SeRA Tau Release (May 13, 2017)

What has changed?
A new version of SeRA was deployed on Saturday, May 13th, 2017. The primary objective of this release was to upgrade our technical infrastructure and make some technical changes. In addition, a number of smaller usability enhancements were added to improve the overall ease-of-use of the system.

Technical Upgrades & Enhancements
- Oracle Apex 5.1 Upgrade
- Better integration of subaward transactions & IDC Waiver transactions
- Changes to support Oracle upgrade
- Create workgroup for MCL faculty
- Better processing of merge activities for parallel transactions

Usability Enhancements
- Look-and-Feel Changes
  - Cleaned-up pop-ups (auto-sized, consistent look)
  - SeRA Footer
  - Updated look for emails
  - Ability to full-screen regions
  - New “Start Proposal / Start Transaction” buttons on Project Summary
  - Updated simple search
  - Header, LHM, & Quick Link changes
- Add multiple attachments at the same time
- Support for multiple SeRA browser tabs
- New routing history section to log transactions (e.g. JIT, LOA, etc.)
Contents

Apex 5.1 technical upgrade................................................................. 3

All transactions now fully integrated with SeRA............................. 3
  Subaward transactions now have the SeRA "Look-and-Feel" .......... 3
  Simple Search includes Purchase Order & Requisition Number criteria ................................................................. 6
  Subaward transaction types listed in the Advanced Search criteria ................................................................. 6
  IDC Waiver transactions now have the SeRA "Look-and-Feel" ........................................................................ 7

Updates to the Look-and-Feel of the System .................................... 8
  Updated Pop-ups ........................................................................ 8
  SeRA Page Footer ........................................................................ 8
  Updated Emails ........................................................................ 8
  Ability to full-screen regions ...................................................... 9
  New location for starting transactions ........................................ 9
  Left Hand Navigation, Header, & Dashboard Changes ...................... 10
  "View Project Attachments" added to the Quick Links for all Transactions .................................................. 12
  Changes to search functionality .................................................. 12

Attachments ................................................................................. 13
  Edit Attachment Category/Subcategory ........................................ 13
  Add multiple attachments with same Category/Subcategory ................................................................................ 13

Updates to Dashboard Filters .......................................................... 14

Multiple SeRA Browser Tabs ............................................................ 14

Display routing history region to other log transactions (e.g JIT, LOA, Misc Consultation, etc.) ....................... 15

Small enhancements & bug fixes ....................................................... 15

Support & Technical Improvements ................................................ 16
  Manage technical issues through our Maintenance Application ................................................................. 16
  New link table for correct transactions ........................................ 16
  Support the Oracle database upgrade .......................................... 16
  New workgroup to track MCL faculty ........................................ 16
  Move Parallel Transaction Processing to a Background Job ................................................................. 16
  Outdated and unused reports removed from reporting application ................................................................. 17
**Apex 5.1 technical upgrade**

The main change as part of the Tau release was a technical upgrade of our Apex infrastructure to Apex 5.1. This upgrade brings with it a great deal of new functionality. Some new functionality was leveraged for many of the additional changes in the release. Other functionality will roll out as part of future enhancements.

This upgrade affects all of the SeRA modules except ARC & PTA Manager (which are hosted on Oracle servers).

**All transactions now fully integrated with SeRA**

*Subaward transactions now have the SeRA “Look-and-Feel”*

We have made changes to Subaward transactions so that the look and feel is similar to other SeRA transactions.

**Subaward Transaction page** has received the following changes (see screenshot below):

- The Subaward transaction page shows a header at the top that includes the name of the page, subrecipient name (with hyperlink to monitoring page), SPO#, Stanford PI, Department, Agreement Number, Agreement Type, Sponsor and Prime Sponsor if applicable. This main header information will display on all Subaward Transaction pages.
- Each section of the page is broken down into separate regions. You can click on the region shortcuts at the top of the page to go directly to the region of choice or you can view all regions at once by clicking Show All.
- Actions such as Save, Reassign, etc are now available in the right hand menu under Actions. You can also access these Actions by clicking the Actions button on the bottom left hand corner of the page.
- The right hand menu displays the ID#, Assignee and Status of the Subaward transaction. You can also see the Transaction Summary count and well as some helpful links under Quick Links.
- The left hand menu allows you to navigate to the SPO, PO, Subaward and Subaward pages such as Attachments, Risk Assessment and the NOS page. When you are in the Subaward Transaction page you can also use the next button on the bottom of the page to navigate to the Attachments and Risk Assessment page.
Attachments are now in a new page. You can access the attachments by clicking on the Attachments link on the left hand menu.
Risk Assessment is now in a new page. You can access the Risk Assessment page by clicking on the Risk Assessment link on the left hand menu.

To enter the Assessment you must double click on the field and select the number from the dropdown menu. In order to save any changes on this page you must click the Save button located on the bottom right hand corner of the page.
When you access the **PO Information page** you will now notice the following changes (see screenshot below):

- The PO Information page has the following two regions.
  - PO Information regions displays the PO number (with hyperlink to Oracle PO information page), PO Amount, Agreement Amount and International Subrecipient information.
  - Transactions regions displays all Subaward Transactions (with Transactions Number as hyperlink to the Subaward Transaction page). You can also create manual transactions by clicking on the Create Manual Transaction button on the top right hand corner of the region.
- The left hand menu allows you to navigate to the SPO, PO and PO transactions pages.

**Simple Search includes Purchase Order & Requisition Number criteria**

All users will now be able to search by Purchase Order (PO) and Requisition Number using Simple Search in SeRA.

**Subaward transaction types listed in the Advanced Search criteria**

All users will now be able to search by Transaction Type, Subaward-New and Subaward-Amend using Advance Transaction Search in SeRA.
IDC Waiver transactions now have the SeRA "Look-and-Feel"

We have updated the IDC Waiver Transaction to have the same look and feel as other transactions within SeRA.

- There is now a header to show the SPO#, PI, Admin Department, and Sponsor the transaction is associated with.
- The left hand menu now shows which SPO, and proposal identifier the transaction relates to.
- The attachments are now on its own page. This allows more consistent attaching of documents and provides the ability to link existing documents to the IDC transaction. You can use the Attachments link on the left hand navigation or by clicking Next button at the bottom of the page.
- Action items have been moved to the right-hand navigation as well as the action button at the bottom of the transaction.
- Additional helpful links are now included in the right hand menu under 'Quick Links.'
Updates to the Look-and-Feel of the System

Updated Pop-ups
The pop-ups within the system now have a standard look-and-feel and are auto-sized to fit the information within the pop-up. This should mean no more scroll-bars within pop-ups, inconsistent colors, and inconsistent button placement.

SeRA Page Footer
We have added a series of useful links to a footer the bottom of the SeRA home page.

Updated Emails
The emails within SeRA have been upgraded with a brand new look! They should look much more professional and the information within them should be much easier to read.
Ability to full-screen regions
Some regions in SeRA can now be made full-screen. This should make the information easier to read without needing to scroll. To make a region full-screen, click on the double arrow icon found on the far right hand of the region header. Some example regions with this new capability can be found on the Attachments page, Project History page, My Action Items page, and the Transaction Log page.

New location for starting transactions
To start a new proposal, use the "Initiate New Proposal" button on the dashboard. For central office users, this button on the dashboard is labeled as "Initiate New" and is used to start new proposals, parallel proposals, and other agreement logs.

The agreement type is now requested in a pop-up and the transaction starts on the PI & Project Location page. The "initiate" action has been removed from the left hand menu so that this menu now only contains navigational items.
A new "Start Transaction" menu button has also been added to the top of the Project Summary page to easily start project level transactions.

**Left Hand Navigation, Header, & Dashboard Changes**

We have made several changes to the SeRA navigation and dashboard.

- The link for "Help" has moved to the header.
- The other application links have been consolidated under the "Navigate to" option in the left hand menu and added to the header.
- New action item filters are available to easily filter action items by type (Proposals, Awards, Other Transactions or Subawards).
- Tabs have been cleaned up. Proposals, Awards, and Other Transactions tabs have been moved to "Jump to" button.
- Central office users can view the IO Ready flag in their Action Items, which lists outstanding tasks for non-central office users.
For central office users, the IO Ready column lists outstanding tasks in progress by others on proposals and awards, updated every 4 hours.

- All remaining work can be completed by an IO or RPM
- There are outstanding tasks: mouse-over for more details
- The system has not checked for tasks (ex: prior to Institutional Review)

<table>
<thead>
<tr>
<th>Task Name</th>
<th>Abbreviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>COI Responses/Disclosure</td>
<td>COI</td>
</tr>
<tr>
<td>COI Training</td>
<td>COI_TR</td>
</tr>
<tr>
<td>OSF Approval</td>
<td>OSF</td>
</tr>
<tr>
<td>SLAC Approval</td>
<td>SLAC</td>
</tr>
<tr>
<td>Export Control</td>
<td>EXPORT</td>
</tr>
<tr>
<td>On Hold</td>
<td>ONHOLD</td>
</tr>
<tr>
<td>Parallel Award, PDRF is incomplete</td>
<td>PDRF</td>
</tr>
</tbody>
</table>
"View Project Attachments" added to the Quick Links for all Transactions
The ability to view project attachments has been added to all transaction types in the Quick Links in the right hand menu so this information can be easily viewed from any transaction.

Changes to search functionality
The search function in the header has been updated in order to remove technical complexity. When searching, a pop-up now opens with the previous search criterial options. For additional ease-of-use, a keyboard shortcut (Ctrl+/) has been added to quickly open the basic search pop-up. Additionally, a new "Advanced Search" navigation link has been added to the left hand menu to quickly access to the full-fledged advanced search.
Attachments

*Edit Attachment Category/Subcategory*
Users may now edit the category and subcategory of attachments by clicking on the Pencil Icon.

*Add multiple attachments with same Category/Subcategory*
Users may now add multiple attachments to the same category/subcategory at the same time.
Updates to Dashboard Filters
The SeRA dashboard is no longer being reset every time the page is loaded. This means selected filters will remain in place the next time you return to your dashboard. Now you can customize your dashboard with custom filters and changes and the system will not reset these changes when you leave the page and come back.

Multiple SeRA Browser Tabs
We have added the ability to open a second browser tab for SeRA without the fear of overwriting your data. This can be done by selecting 'Open New SeRA Tab' from the menu below your SUNet ID.

**Please Note: Editing the same page in multiple tabs will still cause Data issues. Opening a second tab outside of this function will also still cause issues. Please use this function with caution**
Display routing history region to other log transactions (e.g. JIT, LOA, Misc Consultation, etc.)

We have added a routing history region to the log transactions which did not previously display this region. The routing information for these transactions has previously been stored for these transactions and now it can be easily seen.

**Small enhancements & bug fixes**

- **Remove empty region on AAN/NOA**
  
  We have removed an extra empty region that was displaying on the AAN/NOA.

- **PI field label updated in advanced search**

  The PI field label has been changed to "Investigator" on the Extended Project Search to properly define this search criteria (which looks for this user in all faculty roles of a project).
• **Issues with placing project on-hold in the Transaction Log fixed**
  The bug that didn't allow projects to be placed on-hold from the Transaction Log in some scenarios has now been fixed.

• **New information text for "Return for Minor Edit"**
  Information Text displays when selecting “Return for Minor Edit” listing which fields are not editable as part of this action. These fields will require a Major Edit to change.

• **Remarks field in T&C page now limited to 4,000 characters**
  When additional remarks entered on the T&C page of an award exceed 4,000 character limit there are issues in rendering the AAN/NOA. To correct this, we are now limiting these fields to 4,000 characters. A countdown will also display showing the number of characters entered.

• **IDC Waiver: Approval comments no longer stick from previous transaction**
  We resolved an issue where approval comments on an IDC Waiver transaction were copied into the next transaction.

**Support & Technical Improvements**

**Manage technical issues through our Maintenance Application**
We have built out a new support page proactively identifying technical glitches within the system. This will allow identification of particular “stuck” transactions more quickly and resolve these issues even if they are not reported problems.

**New link table for correct transactions**
We are now storing a reference from a correct transaction to the originating proposal or award that is being corrected. This will initially be leveraged for reporting needs, but may be used later for some UI enhancements to better display the sequence of transactions within a project.

**Support the Oracle database upgrade**
Changes to the way we are making calls to Oracle have been made to support the Oracle database upgrade currently scheduled for the fall.

**New workgroup to track MCL faculty**
We have created a new workgroup to denote faculty who are Med Center Line faculty. This should simplify updating faculty who are not currently listed correctly in SeRA.

**Move Parallel Transaction Processing to a Background Job**
When completing an "Initiate Parallel Transaction", the system previously did some heavy processing and created the proposal transaction & award transaction immediately. This could cause performance issues for other users accessing the system at the same time. This processing has now been moved to a background job. This allows the transaction to close immediately, but the creation of the proposal & award transactions will be delayed by a couple of minutes.
Outdated and unused reports removed from reporting application

We have been maintaining a number of old reports in our associated SeRA reporting application that are out dated and no longer used by anyone. As part of this release, we reviewed and analyzed all of our reports and removed the reports that are no longer being used. This will speed up upgrades & enhancements in the future since these reports will no longer need to be tested and maintained.