Transaction Search - A transaction search will search for transactions that meet the search criteria within all SPO records

- From your SeRA dashboard page click on ‘Search’ icon located in the top-right corner

- Click on the Advanced Search link to be taken to the Advanced Search page.

- Click on the Transactions tab. \* The red underline under the tab lets you know the search type you are in.
Select criteria for your search by entering values in the search field(s). **Note: at least one search criteria is required.**

a. **Agreement Types** - Select the agreement type(s). If selecting multiple types, select each one individually from the pick list.

b. **PI** - As you begin typing the PI’s name, a pick list appears. Select the name from the pick list. Continue typing the name to narrow the pick list further. You may also type the SUNET ID.
c. **Sponsor** - A pick list will appear as you begin to type into the Sponsor field. Select the desired sponsor from the pick list. Only one value may be selected.

![Sponsor pick list](image)

- NIH
  - Creative and Novel Ideas in HIV Research (CNIHR)
  - Foundation for the National Institutes of Health (FNIH)
  - NIH Pain Consortium
  - National Institutes of Health (NIH)
  - Nihon Medi-Physics Company, Ltd (NICHON)
  - Nihon Sun U.S. Office (NHCIONSUN)
  - Nihon Unisys Ltd (AZSUNUL)


d. **Current Assignee** - You can search for transactions that are currently assigned to an individual. A pick list will appear as you begin to type in the current assignee field. Select the individual from the pick list. Only one value may be selected.

![Current Assignee pick list](image)

- Tim Leung (tleung - BPRA)


e. **Past or Current Assignee** - You can search for transactions that are either previously assigned or currently assigned to an individual. A pick list will appear as you begin to type in the past or current assignee field. Select the individual from the pick list. Only one value may be selected.

![Past or Current Assignee pick list](image)

- Megan Dietrich (reymar - BPRA)
f. **Administering Org** – Begin typing in the Administering Org field and a pick list will appear. Select the desired org code from the pick list. Only one value may be selected.

![Administering Org](image)

<table>
<thead>
<tr>
<th>Administering Org</th>
</tr>
</thead>
<tbody>
<tr>
<td>xm</td>
</tr>
<tr>
<td>Physics Department (QDXM)</td>
</tr>
<tr>
<td>Psych/Administrative &amp; Academic Special Programs (XMCA)</td>
</tr>
<tr>
<td>Psych/Child &amp; Adolescent Psychiatry and Child Development (XMRC)</td>
</tr>
<tr>
<td>Psych/Sleep Medicine (XMYQ)</td>
</tr>
</tbody>
</table>

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g. **Project Title** - The project title is a free form field. Enter a word or series of words into the project title field. SeRA will search for any combination of those words.

![Project Title](image)

<table>
<thead>
<tr>
<th>Project Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter title here</td>
</tr>
</tbody>
</table>

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h. **Transaction Type** - Click the down arrow to select a transaction type. Only one value may be selected.
i. **Transaction Status** - Click the down arrow to select a **transaction status**. Only one value may be selected. If no value is chosen it will search all transaction status types.

j. **Central Office** - Click the down arrow to select transactions processed by a specific Central Office. Only one value may be selected. If no value is chosen it will search all transactions.
• After selecting chosen search criteria click the Search button on the bottom right. Search results will display as shown below. *Note additional columns ID#, Process Type, Status, and Completed. To customize your report, refer to the Interactive Reporting user guide.

• To clear the search fields, click Reset.