Transaction Searching in SeRA

Will search for transactions (proposals, award amendments, etc.) within all SPO records that meet the entered search criteria.

1. Go to http://sera.stanford.edu/
2. From your SeRA Dashboard page click on Search icon located in the top-right corner

3. Click on the Advanced Search link in the search window or click on Advanced Search from the Left Hand Navigation menu

4. You will land on the Basic Project search tab of the Advanced Search page. The red underline tells you on which search tab you are.

5. Click on the Transactions tab. Enter criteria for your search by entering values in the search field(s). At minimum one search criteria is required.
   A. Agreement Types – type or select the agreement type(s). You can search for multiple agreement types, select each one individually from the picklist
   B. PI Name – search by name or SUNet ID and select name from picklist
   C. Sponsor – search by sponsor name or Institution Code and select from picklist
   D. Current Assignee – search by name or SUNet ID and select name from picklist
   E. Past or Current Assignee – search by name or SUNet ID and select name from picklist
   F. Administering Org – search by department name or Org Code and select from picklist
   G. Project Title – free form text, enter as little or as much of the project title name
   H. Transaction Type – select transaction type from drop down list
   I. Transaction Status – select transaction status from drop down list
   J. Central Office – select central office from drop down list
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. **Only one value may be selected for this search criteria.**

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 for this search criteria.**
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 name from the pick list. Continue typing the name to narrow the pick list further. You may also type the SUNet ID. **Only one value may be selected for this search criteria.**

E. **Past or Current Assignee** - You can search for transactions that were previously assigned or are currently assigned to an individual. A pick list will appear as you begin to type in the past or current assignee field. Select the name from the pick list. Continue typing the name to narrow the pick list further. You may also type the SUNet ID. **Only one value may be selected for this search criteria.**

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 for this search criteria.**

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.
H. **Transaction Type** - Click the down arrow to select a transaction type. **Only one value may be selected for this search criteria.**

![Transaction Type Selection](image)

I. **Transaction Status** - Click the down arrow to select a transaction status. If no value is chosen it will search all transaction status types. **Only one value may be selected for this search criteria.**

![Transaction Status Selection](image)

J. **Central Office** - Click the down arrow to select transactions processed by a specific Central Office. If no value is chosen it will search all transactions. **Only one value may be selected for this search criteria.**

![Central Office Selection](image)

6. After entering your search criteria click the Search button located in the left-hand corner.

![Search Button](image)
7. Results display in an Interactive Report. To further customize your report’s results, refer to the Interactive Reporting user guide.

8. To clear the search fields, click Reset