SeRA Updates

SeRA New User Experience

S.M.A.R.T. Meeting
February 8, 2016

SeRA New User Interface Release

- New interface to align with Stanford website design themes
- Implementation of Stanford Brand Bar and Universal Footer
- Use of Stanford web color palette and fonts
- SeRA specific updates:
  › Updated left hand navigation menu
  › New right hand Actions and Quick Links menu
  › New “jump” links to directly go to other regions of the page
  › New sub-headers for each region
  › New “back-to-top” button feature for navigating on longer forms
  › Clickable Dashboard column function to sort, filter and hide columns
  › Locked transaction header remains on screen while scrolling
  › Improved pop-up window display and function
  › Automatic screen resolution formatting to your monitor
  › Interactive report enhancements
  › Mobile device compatible and scalable interface
What’s new?

- Color and text changes uniform to Stanford themed websites
- Clickable links will be in bold Cardinal and underlined when cursor hovers
- Tab enhancements on My Dashboard
- Dashboard column field features

What else is new?

- Locked header display for easy identification of transaction information
- New Jump links to quickly navigate to regions across the page
- Hide/show regions to minimize scrolling
- Updated left hand navigation and New Action and Quick Links menu

Header will remain locked and displayed while scrolling down.

Jump links will take user directly to the desired region on the page.

Left hand navigation will have hide/show options, re-ordering flow of pages within transactions.

Option to hide or show regions and minimize scrolling.

New Right hand menu lists actions for the current transaction and Quick Links to project comments and attachments.

Sub-headers to clearly identify each region.
Coming soon… New SeRA User Experience

The new SeRA is scheduled to release on March 12, 2016

Release previews and post-release parties will be held to present the new look and feel of with interactive demos.

Campus Release Events @ Clark Center - Room S360

• March 1 – 2:30 to 4:30 pm
• March 7 – 2:30 to 4:30 pm
• March 16 – 9:00 to 11:00 am
• March 24 – 9:00 to 11:00 am

There will be giveaways, raffle drawings, food and on-site help!

Friendly SeRA Feature Reminder…

Default Proposal Development & Routing Form (PDRF) Approvers

Set up your PDRF Default Approvers. Make sure PDRFs for your participating faculty are directed to the right people.

• This feature allows users to establish default approvers or FYI notifications for PDRFs. The default approvers are set through Authority Manager.
• Departments can configure default approvers to apply to all proposals for the department or only under specific circumstances such as when cost sharing, space renovations, or unapproved use of space applies.
• Defaulted approvers are editable and users will still have the option of adding additional approvers, deleting approvers and reordering of approvers.
• More information can be found at the SeRA PDRF Resources at DoResearch
• Need help? Submit a HelpSU ticket to the SeRA support desk
Default Approvers for SeRA
originally presented at SMART August 25, 2015

• Origin of Request:
  - Department Administrators do not know which approvers to select for other departments
  - Faculty don’t know who to select as approvers

• Overview of Change:
  - Allow departments to manage their own approvers
  - Add these approvers to a PDRF by default based on the selected department

SeRA Approvers

• Approvers & FYIs are added based on the department selected

• Approvers & FYIs are added based on the people granted permissions in Authority Manager
Authority Manager

- Two new roles that drive default approvers and FYIs
  - PDRF Department Approver
  - PDRF Department FYI

- Four types of approvers
  - All proposals
  - Committed Cost Sharing
  - Space Renovations
  - Unapproved Use of Space

- Three types of permissions:
  - Cannot Grant: Is an approver, but can't make others approvers
  - Can Grant: Is an approver & can also make others approvers
  - Can Only Grant (Grant-only): Is NOT an approver, but can make others approvers

Organizational Hierarchy

Stanford University

- Proposal 2
  - Admin Org: XZS
  - Approver: Mary

- School of Medicine
  - VAAA
  - School of Engineering
  - AAAA

- Pediatrics
  - XZS

- Pediatrics/Cardiology
  - XHDW

- Pediatrics/Immunology
  - XIU

- Proposal 1
  - Admin Org: 106U
  - Approver: Bilbo & Mary

Stanford University
Thank you for your attention.