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**OVERVIEW**

GMAS has ten different types of document repositories, each of which can be used to store files related to a specific project component, person, organization, or user.

Repository	Description
<b>Subagreement</b>	Exists for each Subagreement associated with a segment in GMAS. Becomes available after the subagreement shell has been created, and is shared with all the amendments for that shell.
<b>Segment</b>	Exists for each project segment. Becomes available when the segment is created.
<b>Request</b>	Exists for each request associated with a project. Becomes available after the request is created.
<b>Person</b>	Exists for each Person that has a Person Profile in GMAS.
<b>Org</b>	Exists for each Organization that has a profile in GMAS (within the Organization section.) This includes both internal (example: a Harvard org or department) and external organizations (example: National Institutions of Health).
<b>Notice</b>	Exists for each Notice associated to a request in GMAS. Becomes available after the notice has been logged.
<b>My Documents</b>	Exists for each user, and most users may only see the contents of a 'My Documents' repository. Always available through the <Documents> menu button. This repository shows both files the logged in user currently has checked out across projects, as well as all documents and emails contained on the logged in user's Document Clipboard. When an email is sent to <a href="mailto:gmastdoc@camail.harvard.edu">gmastdoc@camail.harvard.edu</a> the email will be displayed on this page.
<b>Letter of Credit (LOC)</b>	Exists within the LOC component
<b>Approval</b>	Exists for each Approval within a project segment. Becomes available after the list of required approvals is generated.

**ADDING FILES TO THE DOCUMENT REPOSITORIES**

New documents may be added to a repository either by uploading or emailing.

- Documents that are uploaded or emailed into GMAS must contain file/email/attachment names only letters, underscores ("\_"), or numbers. Any other characters will prevent the file/email/attachment from being added to a repository.

- Some documents proposals may also have naming conventions that should be adhered to. For questions about naming conventions, please contact your central pre-award representative.
- Most file types are supported for uploading and include Word (.doc), Excel (.xls, .xlsx), and PDF (.pdf) etc.

## UPLOADING DOCUMENTS

From a repository or sub-folder homepage, documents can be added by selecting **Add Document**.



At the time of upload, the user may choose to make a file read-only if the file should not be able to be modified by anyone.

A screenshot of the 'Add a document' form. At the top left is the 'HarvardGMAS' logo and a 'GMAS help' link. The title is 'Add a document'. Below the title is a grey box with instructions: 'Select file to upload into GMAS document repository. Write a brief description of document if desired. Check the Make file read-only box to ensure the document cannot be edited.' To the right of this box is a yellow 'Help with this page' button. The main form area has a 'Choose File' button and 'No file chosen' text. Below that is a 'Description' text area. At the bottom of the form is a checkbox labeled 'Make file read-only'. A yellow starburst icon points to this checkbox. At the bottom left is a '\*required fields' label. At the bottom right are 'Cancel' and 'OK' buttons.

## EMAILING DOCUMENTS AND MOVING FROM THE CLIPBOARD

Send emails to be stored in a GMAS document repository by emailing [gmastdoc@camail.harvard.edu](mailto:gmastdoc@camail.harvard.edu). Emails must be sent from a user's preferred email address.

Documents emailed to GMAS will be stored in the sender's Document Clipboard within the **My Documents** repository until moved somewhere else.



Document clipboard    137 Document(s)    **Add document**    Close ▾

Name    Type    Modified

Emailed documents may be added to a different repository by selecting **Get from my Clipboard** from the destination repository.

**Files**    **Add document**    **Delete document**    **Move selected to my clipboard**    **Get from my clipboard**  **Check document**

### WORKING WITH FILES IN THE DOCUMENT REPOSITORIES

Within a document repository, the following functions may be performed on documents. To perform any of these functions, click on the filename link.

**Download copy**    **Check out to edit**    **Rename**    **Edit description**    **Delete**

**Download Copy:** Opens a copy of a document to save the document on your local computer. Downloading a copy does not prevent other users from downloading and editing document at the same time. (To do this, instead **Check out to edit** document.)

**Check Out to Edit:** (see description above)

**Rename:** Allows user to rename the file. This will result in a new version.

**Edit Descriptions:** Allows user to edit the description of the file. This will result in a new version.

**Delete:** Removes all versions of the document from GMAS. **Note:** documents that have been deleted in error may not be retrieved.

### CHECKING FILES IN AND OUT

Each repository offers the ability to **Check out to edit** the current version of a document. When a document is checked out, no other user may make edits to the document until it is checked back in or unlocked. When a document is initially checked out for edits, the user may select the location on their computer where they would like to save the document for editing. All of a user's checked out documents will display in the user's My Documents repository. Once edits have been made, the document should be checked in by selecting **Check in after edit** on the document home page. The user will be prompted to select the location where the updated file is located on their computer, and to enter a Description of the changes made. When the document is checked in, a new version number is assigned to it and the previous version is logged below in the Previous Versions section.

Central "Special Users" (i.e. FSS GMAS team) have the ability to unlock documents by selecting **Unlock version**. This will check documents back in and should be used in the event that the person who checked out the document is not available to check it back in.

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## MOVING DOCUMENTS

Documents may be moved between various repositories or folders. To move a document, start in the document's source repository or folder. Select the checkbox next to the file to be moved and then select **Move Selected to My Clipboard**. In the destination repository or folder, select **Get from my clipboard** to retrieve document.

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## DOCUMENT VERSIONS

A new document version is created when a document is renamed, has a new description, or is checked in after being checked out. Version numbers are incremented sequentially each time a document is modified. Each version of a document is viewable by selecting the version's "Ver.#". Users may:

**Download Copy** (see description above)

**Revert to this Version:** Creates a new version of the document that is identical to the selected version. The previous version is archived as a new version.

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## EMAILED DOCUMENTS

Documents stored in repositories as emails instead of files have a limited selection of actions. In addition to the actions below, click on an attachment file link at the bottom of the email body to display information about that attachment. Email attachments are by default, read-only and behave as a read-only document.

**Delete:** This will delete the email from GMAS. If there are any attachments associated with that email, the attachments will move to the same repository from which the email was deleted. If the attachments are also to be deleted, see Deleting a document (above).

**View e-mail in new browser:** Opens a new browser or tab to display email.

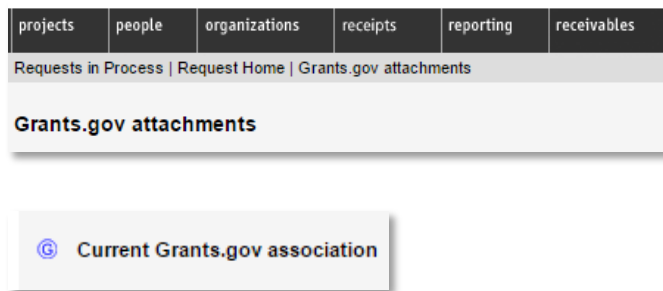
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## GRANTS.GOV DOCUMENTS

Documents stored in GMAS repositories may be included in Grants.gov electronic submissions.

**To associate a document to a Grants.gov form:** Select **Locate** from the Grants.gov attachments screen to upload a new document or select a document previously uploaded to this request repository. Once a document is associated to a Grants.gov form, that document's information screen will display the name of the form corresponding to the document as the "Current Grants.gov association." This document may not be deleted.

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**Working with documents that have been submitted as a part of a Grants.gov submission:** Once a request has been submitted to Grants.gov, the associated documents are linked to a Grants.gov submission. Each document's information screen displays a link to the associated submission. These documents may not be deleted.

## LOCKING DOCUMENTS

Users with the Central Administrator role in GMAS can lock documents to prevent accidental deletion. From a particular document repository, these users can select document(s) and use the **Lock Document** button to prevent deletion or editing. Other users in the Central Administrator role may unlock previously locked documents. The **Unlock documents** button can be found on the document detail page.



## FAQS

### How can I retrieve a previous version of a document?

If a document has prior versions, they will be listed in a section titled **Previous Versions**. Selecting the **Ver. #** of the version of interest will bring you to a screen that lists the document information and will allow you to **Download Copy** or **Revert to this version**.

### Can I delete documents in another person's person repository?

The only roles that can do this are Central "Special Users" and Central Administrators.

### How can I email documents to my clipboard in GMAS?

Email documents to [gmasdoc@camail.harvard.edu](mailto:gmasdoc@camail.harvard.edu).

Log into GMAS. Select **Documents** from the navigation bar. The emailed document(s) will appear in the Document Clipboard.

**Do I have to use a specific email address to email documents into GMAS?**

Yes. You must use your "preferred" email address. The "preferred" email address can be changed by contacting your local HR office.

**I uploaded a huge document (over 5MB) and I don't see it in preview. Will it get submitted to Grants.gov?**

Yes. Documents over 5MB do not display in preview, but will still be submitted to Grants.gov.

**When I preview my document, some of the pages are turned sideways or flipped upside down. How do I fix this?**

Sometimes Adobe will include hidden format code in your document that is interpreted during preview in GMAS. To get around this, please use CutePDF (free download). Open your PDF document in Adobe or Adobe Reader and print (choose CutePDF as your Printer). Save the document to a location where you can easily retrieve it and re-upload it to GMAS. This should correct the issue. If you have the original document in another format (i.e. Word or Excel document), printing from the original document to CutePDF will work as well.

**I get an error uploading a document. What are possible sources of the error?**

Document names may not contain spaces or characters that are not a letter/number/underscore. Spaces and special characters should be removed or replaced with underscores. (Attachments within emails must also not have document names that include spaces or special characters). Emails with pictures or irregular fonts should be sent into GMAS as text-only emails.

**Why is a document that I uploaded listed as having a size of 0 bytes?**

This issue occurs when a browser is closed before the upload has been completed or when the document name is changed during the upload. The document should be re-uploaded to resolve the issue.