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Introduction

GMAS has different document repository types. Each can be used to store files related to a specific project component, person, or organization.

Repository	Type	Availability and Purpose
Segment Repository	Project	Available when a segment is created and is meant for housing general segment documents.
Request Repository	Project	Available for each request type once created and is meant for housing documents related to the request.
Notice Repository	Project	Available for each notice once created and is meant for housing documents related to the notice.
Approval Repository	Project	Available for each approval within a request or project segment and is meant for housing documents related to the approval. Note: ○ The cost sharing repository is one repository shared across the cost sharing

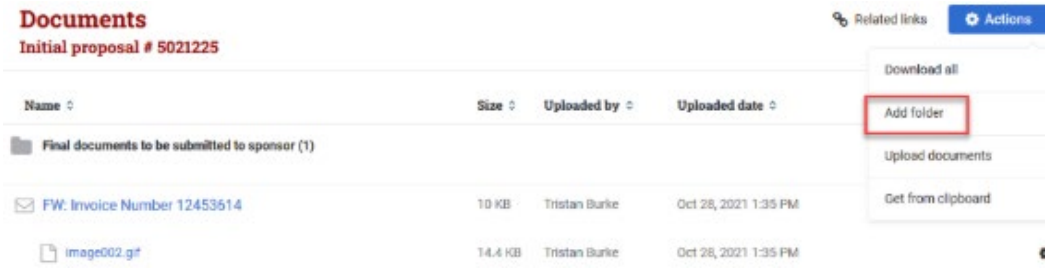
		approval, cost sharing form, and cost sharing request. ○ The international collaborations and approvals (ICA) repository is one repository shared across the ICA approval, ICA form, and ICA request.
Financial Deliverables Repository	Project	Available for each financial deliverable within a project segment and is meant for housing the documents relating to the financial deliverable.
Non-Financial Deliverables Repository	Project	Available for each financial deliverable within a project segment and is meant for housing the documents relating to the deliverable
Transaction Monitoring Repository	Project	Exists for each project segment and is available when a segment is created.
Subrecipient Repository	Project	Exists for each subrecipient associated with a project segment and is available after the subrecipient record has been created.
Amendments Repository (Visit the Subagreement and Subamendment Document Repositories Job Aid for more information on this repository)	Project	Panel from amendment page links to this document repository and is available after the amendment has been created.
Clipboard	Person	Exists for each person record in GMAS and is only visible to the individual. This document repository contains ○ emails mailed to gmasdoc@camail.harvard.edu from a preferred email address of a user in GMAS ○ any emails or documents moved to Clipboard from the other repositories ○ emails or documents uploaded directly to the clipboard
Person repository	Person	Exist for each person record in GMAS and is visible to everyone with GMAS access.
Outside Foreign Contracts and Agreements (Visit the Outside Foreign Contracts and Agreements job aids for more information on this repository)	Person	Exists for each person record in GMAS. Visibility of this repository is as follows: ○ Everyone can view their own repository and upload documents. ○ Those in the "Contracts reviewer" role can view everyone's repositories, upload documents, delete documents, and add

		descriptions and status categories to the documents. ○ Those who play an active role on projects can view and upload documents to repositories for individuals who are on the research teams to the projects within their scope.
Organization Repository (Internal and External)	Organization	Exists for each organization record in GMAS.
Letter of Credit (LOC) repository	LOC	Exists within the LOC component in GMAS and is only available to those in the LOC specialist role.

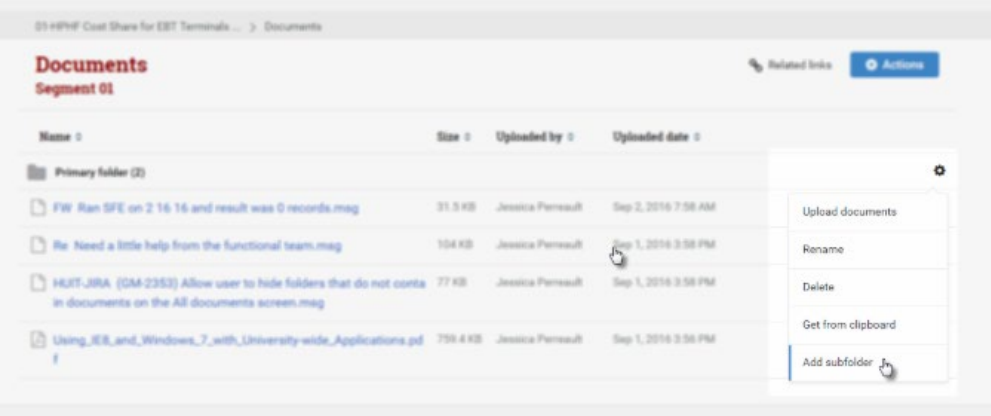
Adding Folders and Files to the Document Repositories

Folders can be created to organize documents within a document repository. To create a folder in a document repository, navigate to the document repository where the folder will live.

To create a folder, select "Actions" and then "Add folder". Then enter the folder name and select "Done".



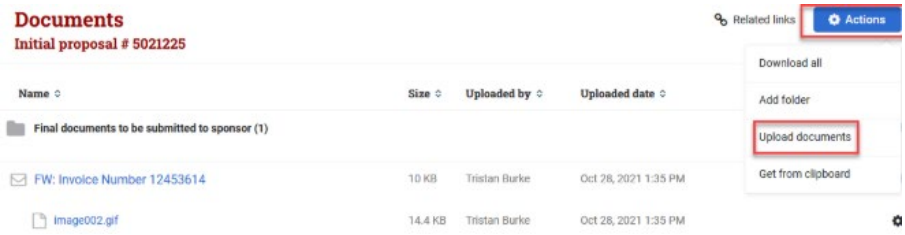
GMAS also allows a second tier of subfolders. To create a subfolder, navigate to where the primary folder lives, select the gear icon next to the primary folder and then “Add subfolder”. Enter the subfolder name, and select “Done”.



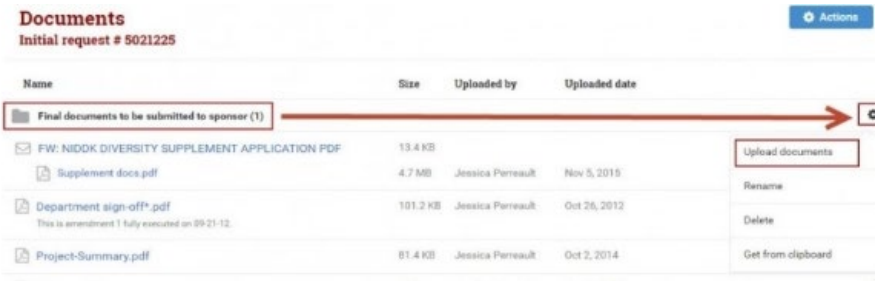
Uploading Documents

Documents can be uploaded one by one, or in bulk in the document repositories.

1. To upload documents, navigate to the document repository where the document will live. Select the "Actions" button and then select "Upload documents".

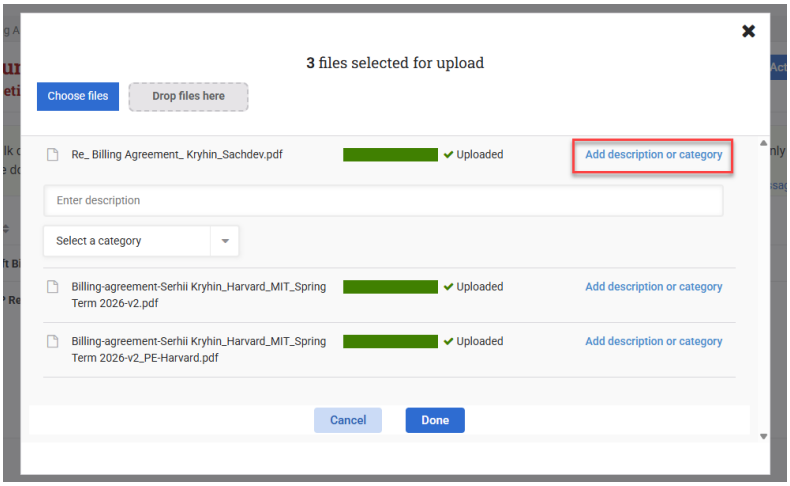


or to upload a document to a folder, select the gear icon associated to the folder and then "Upload documents".



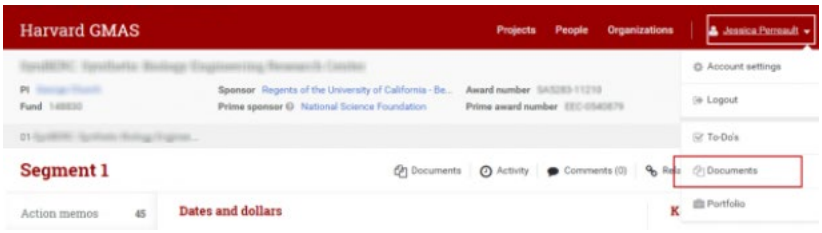
2. Select Choose files to select or drag them from a location on your desktop into the “Drop files here” window. To select multiple files, use Ctrl on the keyboard while making document selections (you can also drag a folder into the Drop files here window to upload all the contents of a folder.) Then select "Done" to upload all the documents to the document repository.

3. Descriptions and categories can be added to each of the documents prior to finalizing the upload by choosing “Add description or category.

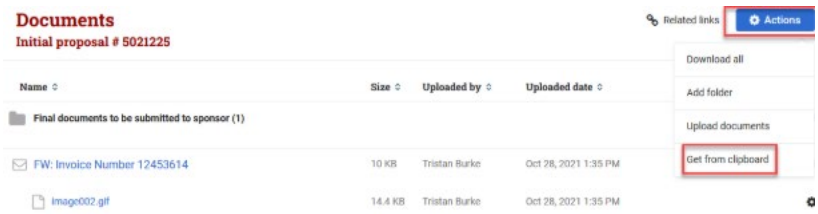


Emailing Documents and Moving from the Clipboard

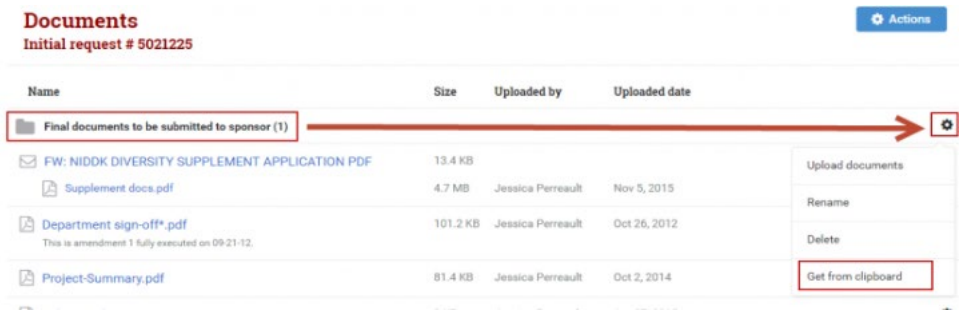
Emails can be stored in a GMAS document repository by emailing gmasdoc@camail.harvard.edu from a user's preferred email address. Documents emailed into GMAS will be stored in the sender's Clipboard until moved. To access the clipboard, select your name in the GMAS header, and then select "Documents".



Documents can be moved from the Clipboard by navigating to the document repository where the document will live. To move the Clipboard documents to the desired document repository, select "Actions" and then "Get from clipboard".



Or to upload to a folder, select the gear icon associated to the folder and then "Get from clipboard". Select the documents from the Clipboard to be moved into the repository and select "Done".



Working with the Folders and Files in the Document Repositories

Documents can be viewed, moved, deleted, and document attributes can be edited once they are in the document repository.

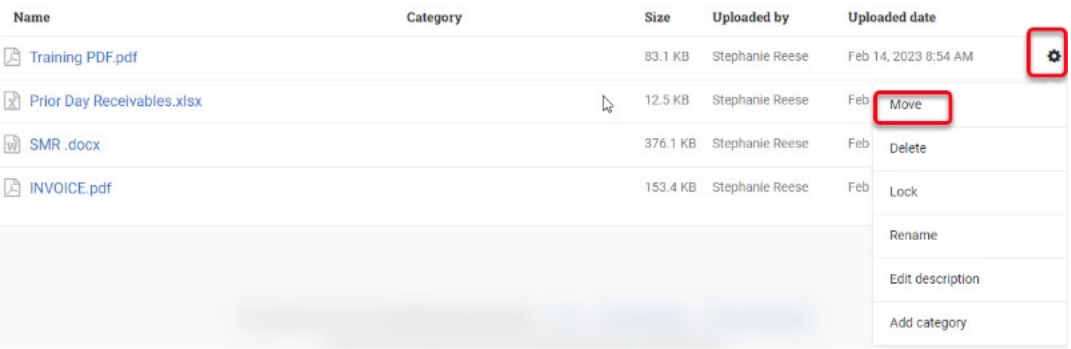
Viewing Documents and Emails

To view documents within a folder, open the folder by clicking on the folder icon. To view an email, the attachments of an email, or an uploaded document, select the name of the email or document.

Moving Documents and Emails

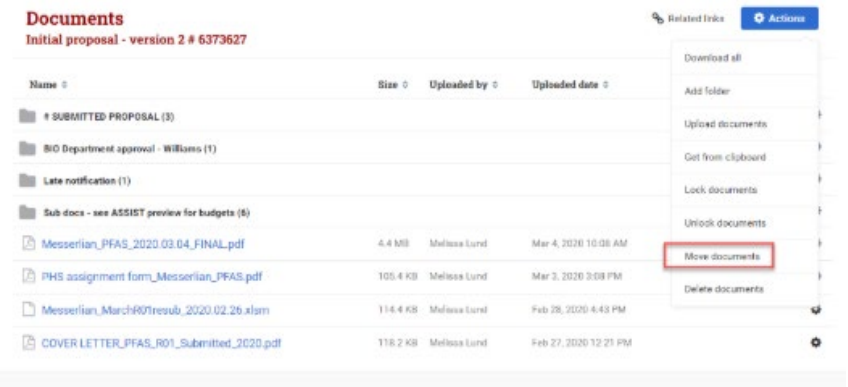
Moving a document or email to/from a folder or to the clipboard individually:

Select the gear icon associated to the document or email and then select "Move". Select the folder or select the clipboard and then "Done" to successfully move the document or email. (Attachments can also be moved out of an email by following the same process.)



Moving documents or emails to/from a folder or to the clipboard in bulk:

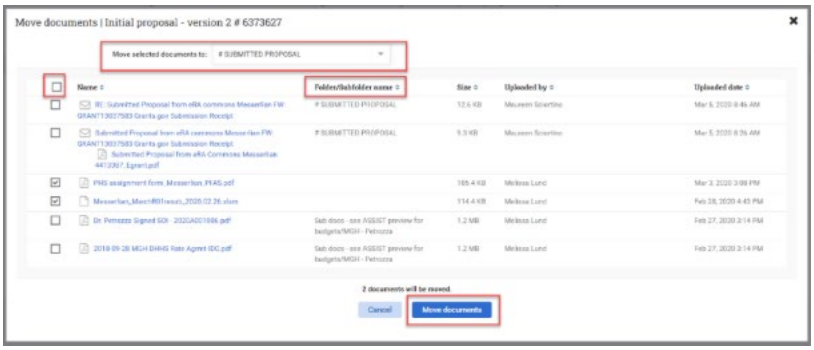
1. Select the "Actions" button at the top of the screen and then select "Move documents".
   Note: the "Move documents" option will be disabled if there are no documents that can be moved.



2. The “Move documents” modal will contain all documents and emails from the document repository that can be moved around (this modal excludes locked documents).
3. Select where the documents will be moved to. They can be moved into folders by selecting the folder or subfolder name, to the clipboard if permissions allow it, or to the top level of the document repository.
4. Once the location is selected, all documents can be selected from the top checkbox, or multiple documents can be selected by selecting the individual checkboxes in the list. The “Folder/Subfolder name” column indicates where in the repository the documents are located. No name indicates the document is at the top level of the document repository.
   Note: Attachments of emails will not have checkboxes next to them. If attachments need to be treated differently from the email they are associated

with, they must first be moved out from the email following the move individual documents process.

5. Once all the documents are chosen, select “Move documents” at the bottom of the modal.
   Note: If a location was selected and any of the selected documents to move are already residing in that location, they will not move.



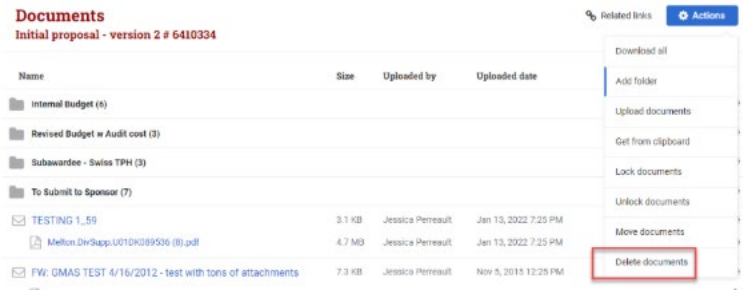
Deleting Documents, Folders, and Emails

Deleting a document, folder, or email individually

Select the gear icon associated to the document, folder, or email and then select "Delete".
Note: Deleting a folder or an email will also delete all associated documents.

Deleting documents and emails in bulk

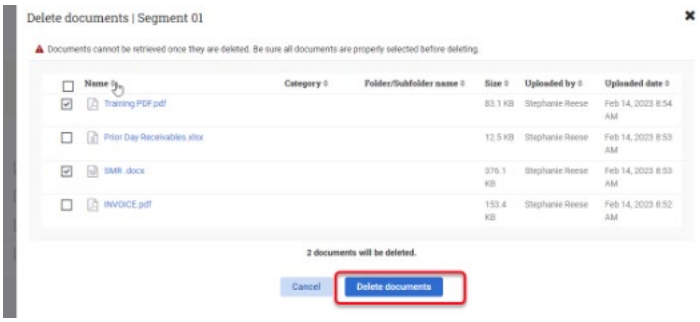
1. Select the “Actions” button at the top of the screen and then select “Delete documents”. Note: the “Delete documents” option will be disabled if there are no documents that can be deleted within the document repository. This can be due to security or documents being locked.



2. The “Delete documents” modal will contain all documents and emails from the document repository that can be deleted (this modal excludes locked documents). All documents can be selected from the top checkbox, or multiple documents can be selected by selecting the individual checkboxes in the list.

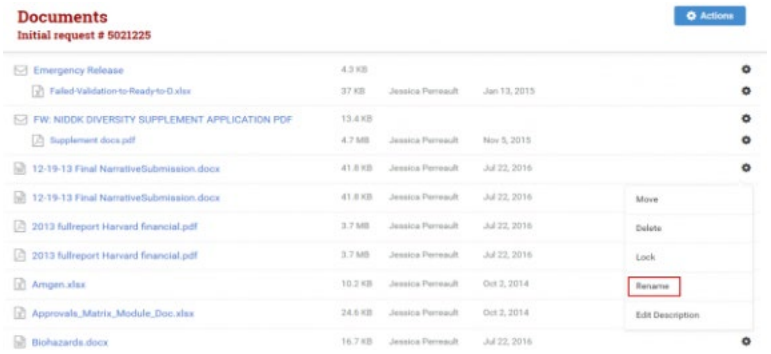
Note: Attachments of emails will not have checkboxes next to them. If attachments need to be treated differently from the email they are associated with, they must first be moved out from the email following the move individual documents process.

Once all the documents to be deleted are set, select “Delete documents” at the bottom of the modal. WARNING: Documents cannot be retrieved once they are deleted. Be sure all documents are properly selected before selecting the "Delete documents" button.



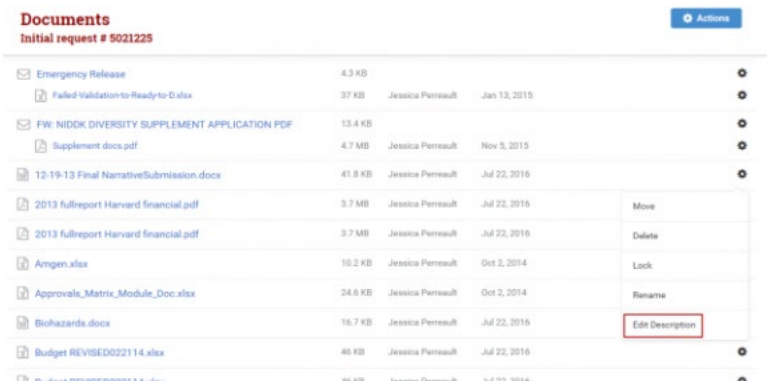
Renaming Documents and Folders

To rename a document or folder, select the gear icon associated to the document or folder and select "Rename". Enter the new name of the document or folder and then select "Done".



Editing Description of Documents

To edit the description of a document, select the gear icon associated to the document and select "Edit description". Enter the new description of the document and then select "Done".

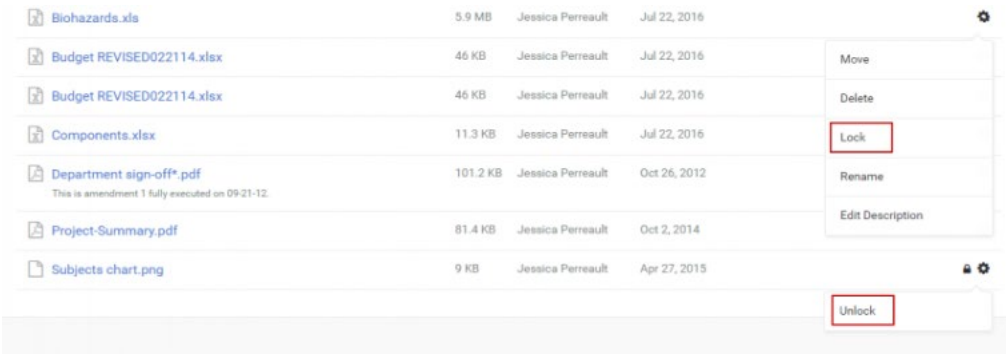


Locking and Unlocking Documents

A lock icon will appear next to the gear icon if the document or email has been locked and will disappear if the document or email is unlocked.

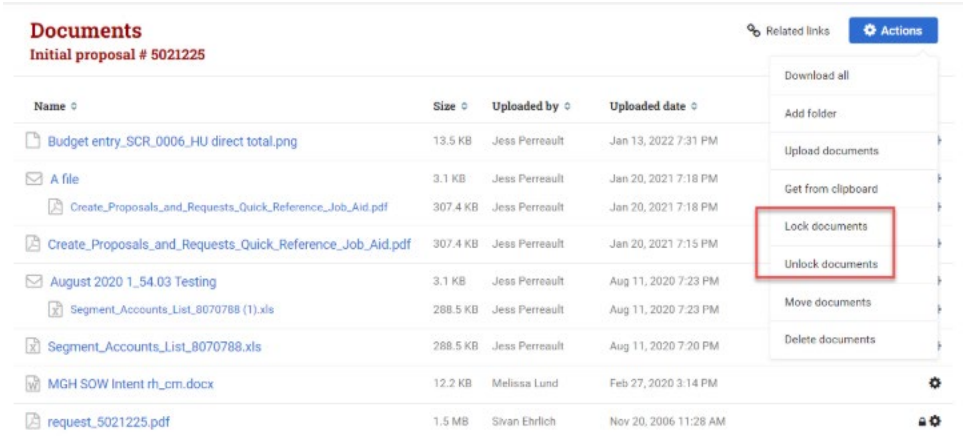
Locking and unlocking documents and emails individually:

Select the gear icon next to the document or email and then select "Lock" or "Unlock".



Locking and unlocking documents and emails in bulk

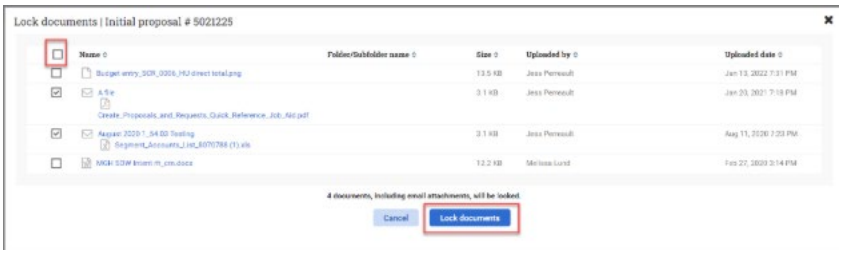
1. Select the “Actions” button at the top of the screen and then select “Lock documents” or “Unlock documents”. Note: the “Lock documents” and “Unlock documents” option will be disabled if there are no documents that can be locked or unlocked within the document repository. This button can also be disabled due to security.



2. The “Lock documents” and “Unlock documents” modals will contain all documents and emails from the document repository that can be locked or unlocked. All documents can be selected from the top checkbox, or multiple documents can be selected by selecting the individual checkboxes in the list.

Note: Attachments of emails will not have checkboxes next to them. If attachments need to be treated differently from the email they are associated with, they must first be moved out from the email following the move individual documents process.

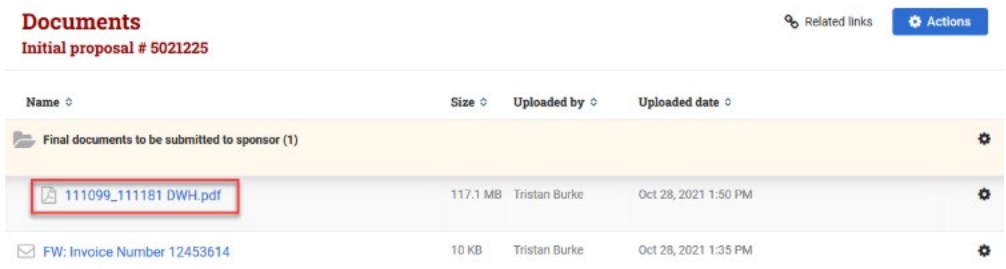
3. Once all the documents to be deleted are set, select “Lock documents” or “Unlock documents” button at the bottom of the modal.



Downloading Documents

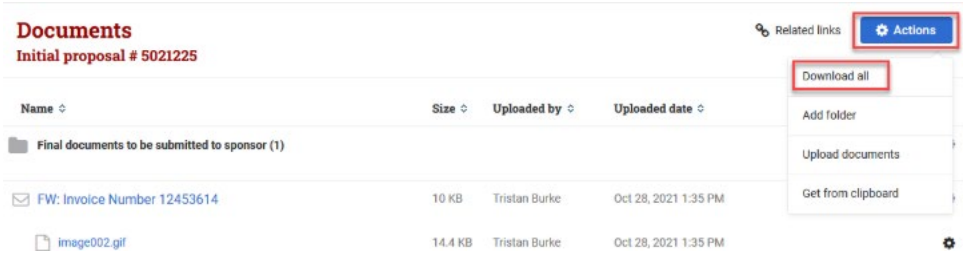
Downloading an individual document or email attachment

Click on the name of that document or email attachment and it will be downloaded by your browser.



Downloading all documents from a repository

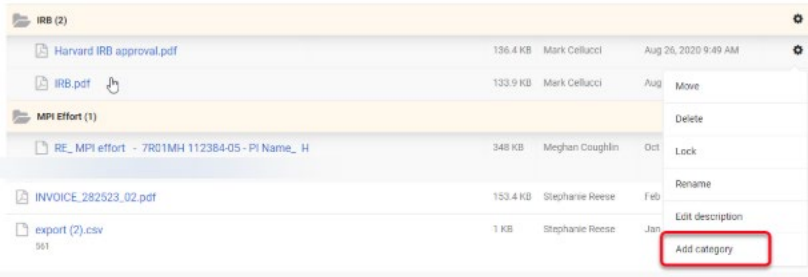
To download all documents in a repository, navigate to that repository and select "Actions" and then "Download all". If you choose to download all documents in a repository, they will be downloaded by your browser as a zip file.



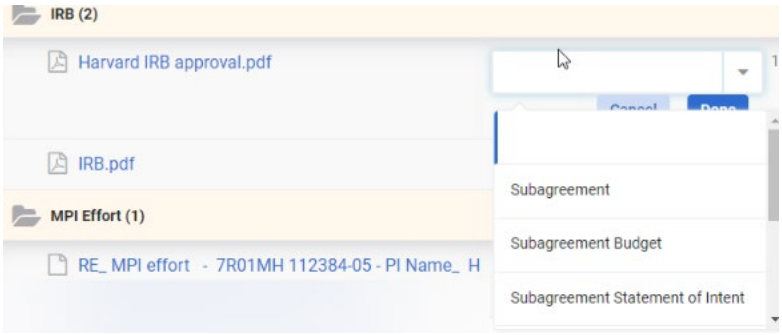
Categorizing Documents

The ability to categorize documents exists in financial deliverable repositories, request repositories, segment repositories, subrecipient repositories and subagreement and subamendment repositories.

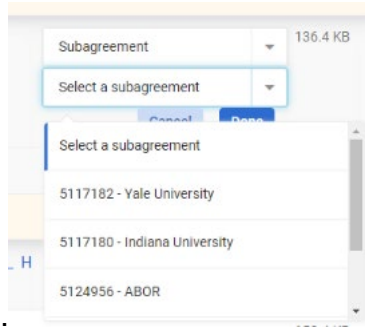
Previously uploaded documents can be categorized by choosing the gear icon and selecting “Add Category”.



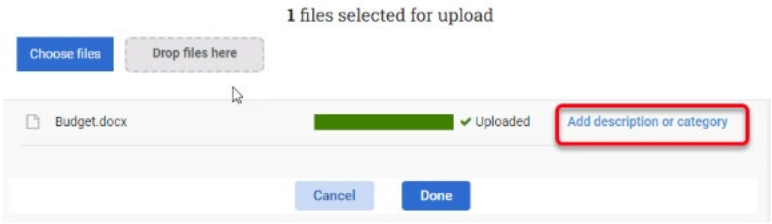
A drop-down menu is available to choose a category. Only certain categories are available from each repository.



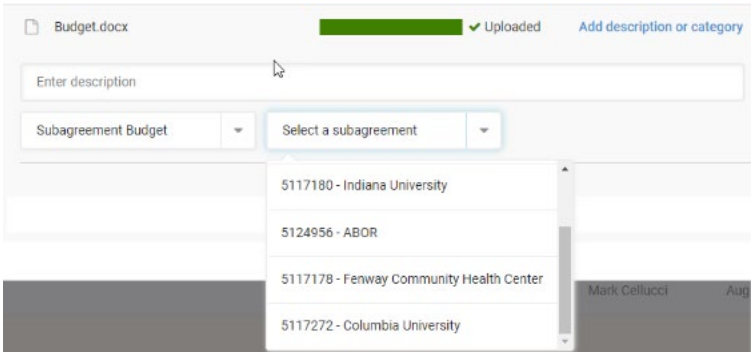
If the document is not in a subagreement or subamendment document repository, and a sub related category is selected, an additional option to associate the document to a subagreement ID is available



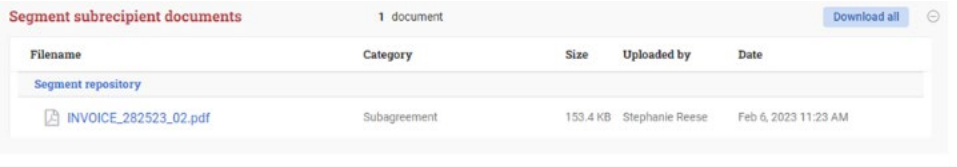
Newly uploaded documents can be categorized the same way by selecting “Add description or category”



Available categories and sub recipients are displayed to choose from.



Documents in the request repositories and segment repositories that are associated to subagreement IDs are visible in a new panel on the subrecipient homepage called “Segment subrecipient documents”. More information can be found in the Subagreement Document Repository Job aid.



This panel is only visible on the screen if there are other repositories throughout the segment that have been associated with the subrecipient record. Secondary headers link to the document repository that the documents were uploaded in.

GMAS Document Management Guidelines

The Office for Sponsored Programs, Harvard Medical School Office of Research Administration, and the Harvard Chan School of Public Health Sponsored Programs Administration have collectively defined guidelines to assist in the organization, maintenance, and retention of documentation in GMAS. These guidelines can be found here.

Document Repository Security

Security in the document repositories varies based on role and document repository type. For a full list of security by role and repository type use this document security matrix.

Helpful links

- Introduction to GMAS job aid
- Subagreement and Subamendment Document Repositories Job Aid
- Browser Download Preferences
    - Firefox
        - Scroll down to section called “Change download actions” or navigate here.
        - Instructions to view PDF files in Firefox browser (plug-ins and how to fix common issues):

  - Chrome
    - Scroll down to section called “Change download locations”
    - Instruction to view PDF files in Chrome browser (enable plug-in)
  - Internet explorer
    - Scroll down to section called “Change the default download folder on your PC
    - Instruction to view PDF files in Internet Explorer browser (enable PDF add-on)
- Solutions to common issues viewing PDFs from a website from Adobe

System links

- Grants Management Application Suite (GMAS)

Documentation updates tracker

Update date	Description of updates
6/28/2026	Moved to new job aid template