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Introduction

The Grants Management Application Suite (GMAS) is the engine behind the administration of the University's sponsored funding. The system is the University's system of record for proposals, awards, financials, and documentation related to sponsored segments. It enables the proposal and request development, approval, and

submission processes. GMAS supports the end-to-end grant lifecycle process and is integrated with other University financial and compliance systems.

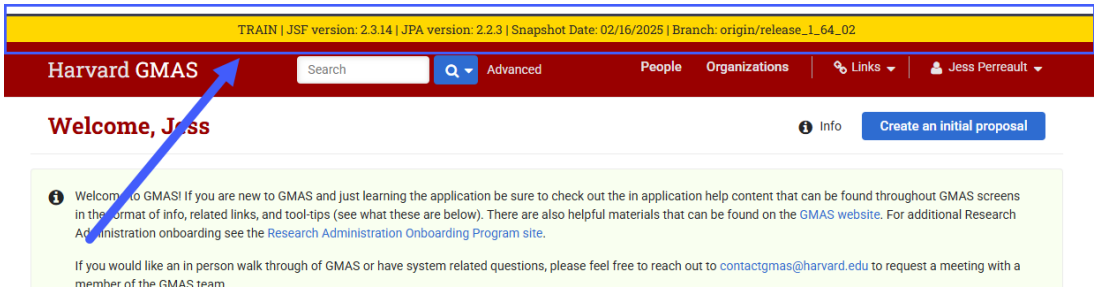
Getting started with GMAS

Security

If you do not have security to access GMAS, a local GMAS authorized requestor can assist in setting you up with the correct access. GMAS access will also be granted if you have been added to a segment research team as a PI or Mentor, or if you have been added in an administrative role to the segment by a department or central office representative.
For more information about security/access see the Security management section below. You can also email contactgmas@harvard.edu for guidance if needed.

System links

GMAS is accessible from https://gmas.harvard.edu/. If you are interested in getting to know GMAS and would like to navigate and edit without impacting real data, use the GMAS training environment which can be accessed from https://gmastraining.harvard.edu/.
Tip: When in training mode, look for the yellow banner at the top of the GMAS screen to ensure you are in the training environment and not in production.

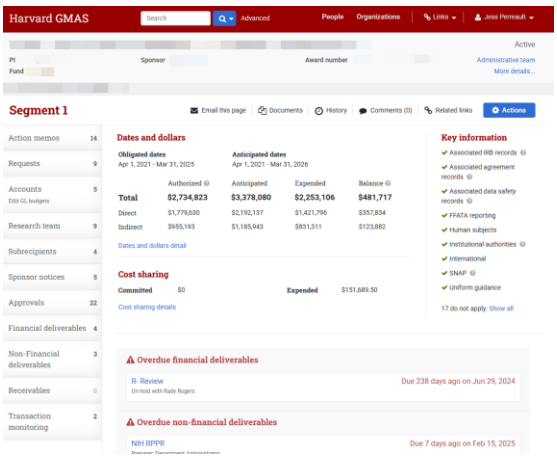
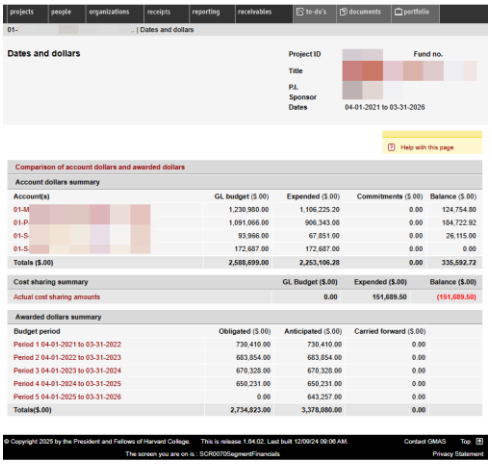


Note: The GMAS training environment is typically refreshed every Sunday with a snapshot of data from the production system. This snapshot remains unchanged throughout the week, meaning any updates made in GMAS production after the refresh (e.g., on Tuesday) will not be reflected in the training environment until the next refresh. Changes made within the training environment do not affect actual production data.

GMAS screens

The GMAS screens are being upgraded to a modern user interface. To ensure continuous business improvement, it was decided to update and create new features

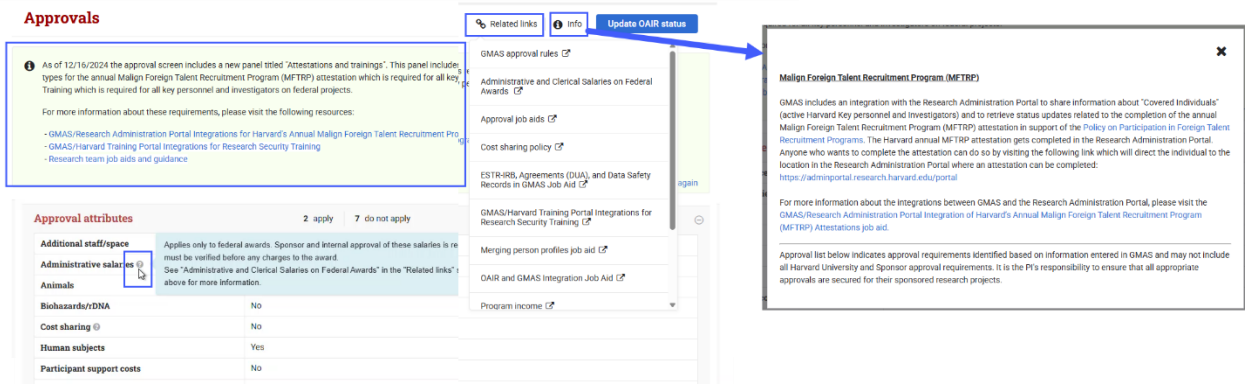
while transitioning to the new interface. As a result, switching between the old and new interfaces during navigation may occur.

New GMAS screen	Old GMAS screen
	

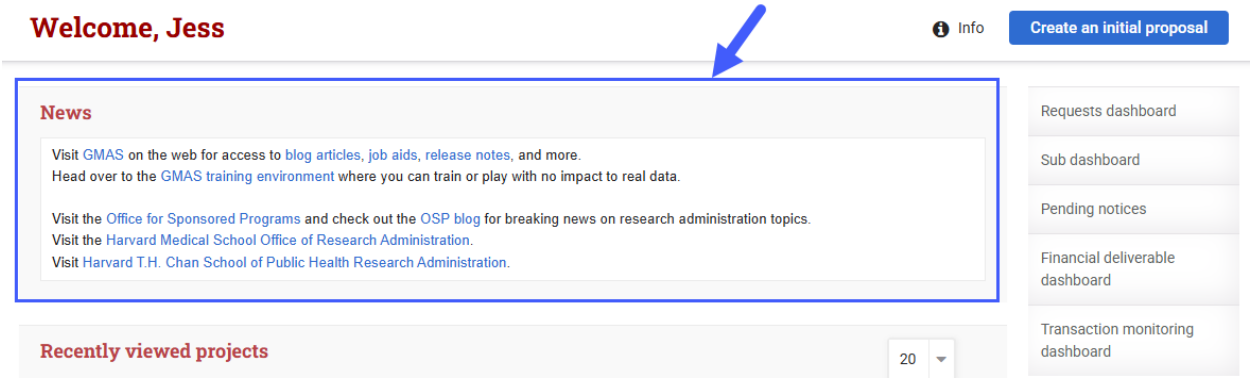
System related resources

GMAS has in-application help content from all new GMAS screens that can be found in the form of tooltips, screen info, and related links.

- Tooltips are hover over help content related to a particular field identified with a question mark icon.
- Info includes screen level information. There are two types of screen info. One is in the format of on-screen dismissible content, and the other is available from an info link on the screen which is not dismissible and needs to be selected to be visible.
- Related links appear at the top of any new GMAS screen that has them. Links include job aids, policies, report dashboards, or anything else that may be helpful in relation to the screen.



The GMAS homepage also has a news section which is updated with system outage information and release information.



There are many additional resources available outside of the system to assist with GMAS.

The GMAS website has resources in the form of job aids to help provide more detailed information about a particular area of the application, release notes to help share information about enhancements that have been made in the system, and a blog where you can learn about upcoming enhancements, tips and tricks, or other system related news.

Be sure to check out the Research Administration Resources website, where you'll find a wealth of trainings, including the GMAS Basics and Systems Overview courses.

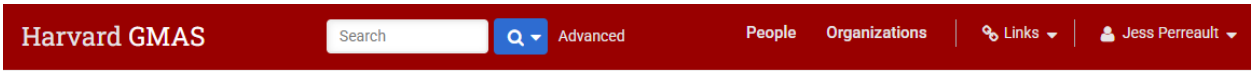
Basic navigation

GMAS has some basic navigation patterns that are helpful when moving around in the system.

Global navigation header

The global navigation header can be found from all new GMAS screens that are not edit screens. The global navigation header makes it easy to jump into segments, person

profiles, organization profiles, helpful external links to other applications, websites, or dashboards, and personal menu items.



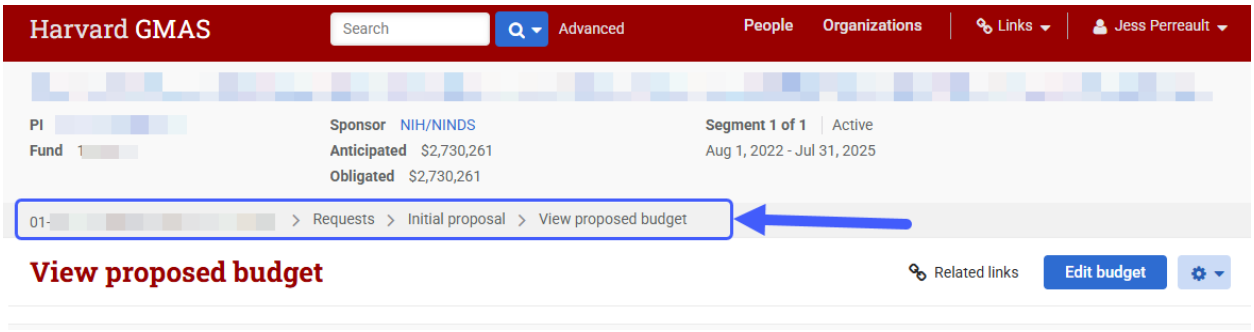
- The **Harvard GMAS logo** on the left of the global navigation header will always direct you back to the GMAS homepage.
- The **quick search** allows you to type in a fund number, a project id, a title, or a person name to quickly search GMAS for any segments that match on what has been entered. Searching is initiated either by pressing Enter on the keyboard or by selecting the button to the right of the search to select what criteria to filter on. The **Advanced link** to the right of the quick search will direct to the advanced search screen where searching can be done on additional criteria.
  In the quick search:
  - Typing in a 6-digit number and pressing Enter on the keyboard will automatically search for a segment with that fund number and direct you to the segment homepage if there is a match.
  - Typing in a number combination followed by a dash and two additional numbers (i.e. 0000000-00) and pressing Enter on the keyboard will automatically search for a segment with that project id and direct you to the segment homepage if there is a match.
  - Typing alphabetical characters and pressing Enter will produce search results where the characters have a match either in the title or PI/Mentor.
- The **People link** will bring you to person search where you can find person profiles (see Person profiles below for more information).
- The **Organizations link** will bring you to organization search where you can find internal and external organizations profiles (see Internal and external organization profiles below for more information).
- The **Links dropdown** provides external links including other research administration related applications, central submitting office websites, sponsor websites, HART dashboards, and more.
  - *Don't see a link there that would be helpful to be there? Submit a request to contactgmas@harvard.edu to see about adding it!*
- **Your personal menu dropdown** provides links to your open GMAS to-dos, your portfolio, your notification preferences, and your personal documents. These are all items that can also be found in your own person profile in GMAS (see Person profiles below for more information). This menu is also where you can log out of GMAS.

Hyperlinks

- Hyperlinks can be found throughout GMAS. From newer screens, the hyperlinks will be blue, and from older GMAS screens the hyperlinks will be red. These links will always navigate to the relevant profile or homepage. For example, person hyperlinks navigate to the individual's profile; organization hyperlinks (internal and external) lead to the organization's profile; project ID links go to the segment homepage; and approval links navigate to the approval homepage.

Breadcrumbs

When navigating through GMAS, your movements will be tracked through breadcrumbs. Breadcrumbs should be used to navigate back to prior screens. **Using the browser back button runs the risk of navigating to a screen with outdated cached information which can cause unexpected system errors.** Use of breadcrumbs will ensure the screen is up to date and navigation continues to be tracked properly.



Common functions

There are some functions that can be found throughout GMAS that are repeated in several places.

Documents

Document repositories are found throughout GMAS to assist in the organization of files related to projects, people, and organizations.

Segment repository: Exists for each project segment and is available when a segment is created.

Request repository: Exists for each request associated to a project segment and is available when a request is created.

Notice repository: Exists for each notice associated to a request or project segment and is available after the notice has been logged.

Approval repository: Exists for each approval within a request or project segment and is available after the list of approvals is generated. Note: The cost sharing and International Collaboration and Activity (ICA) repositories share their documents across their respective approval, form, and request homepages.

Financial deliverable repository: Exists for each financial deliverable within a project segment and is available after the financial deliverable is scheduled.

Non-financial deliverable repository: Exists for each non-financial deliverable within a project segment and is available after the non-financial deliverable is scheduled.

Transaction monitoring repository: Exists for each project segment and is available when a segment is created.

Subrecipient repository: Exists for each subrecipient associated with a project segment and is available after the subrecipient has been created.

Subagreement/Subamendment repository: Exists for each subagreement/subamendment associated with a project segment and is available after the subagreement or subamendment has been created.
Visit the Subagreement and Subamendment Document Repositories Job Aid for more information on this repository

Clipboard: Exists for each Harvard University ID (HUID) person profile in GMAS. A person's clipboard is only available to them. The clipboard is a collection of documents that were emailed into GMAS (gmasdoc@camail.harvard.edu) by that person, or documents that were moved into the clipboard from other repositories for the purposes of moving them around to their proper locations.

Person repository: Exists for all person records in GMAS and is visible by everyone in GMAS. Note: Confidential documents should not be housed in the person repository due to its open access.

Outside foreign contracts and agreements (person level) repository: Exists for each person record in GMAS. Visibility to the repository is as follows:

- Everyone can view their own repository and upload documents.
- Those in the "Contracts reviewer" role in GMAS 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.

Visit the Outside Foreign Contracts and Agreements job aid for more information on this repository

Organization repository: Exists for each organization record in GMAS and is visible by everyone in GMAS. Note: Confidential documents should not be housed in the organization repository due to its open access.

Letter of credit repository: Exists within the LOC component of GMAS and is only accessible with those with the LOC Specialist role in GMAS.

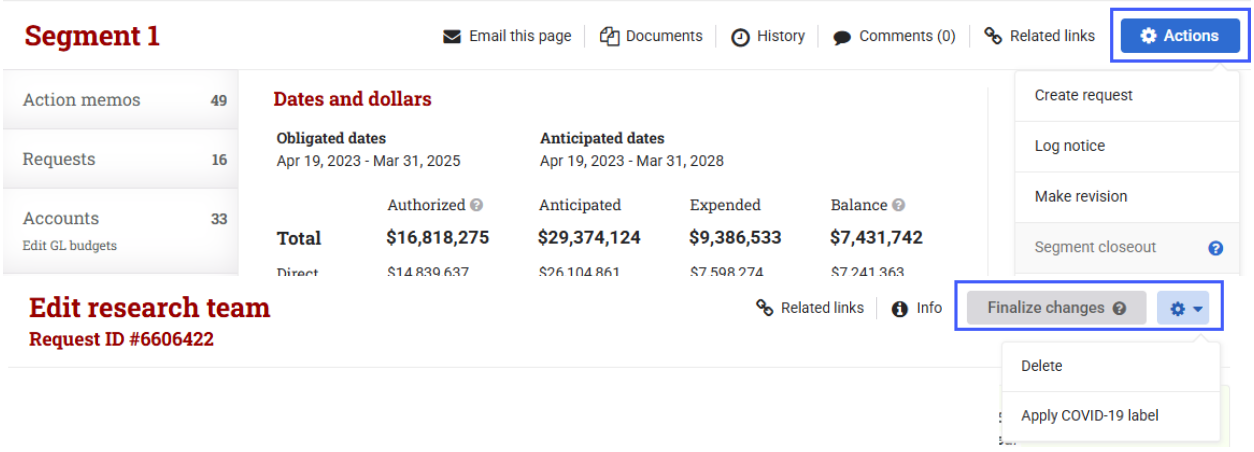
Within each document repository, files can be additionally organized through folders (up to two tiers), document categories (available from select repositories), and document descriptions. Once files are added to the document repository they can be renamed, attachments can be pulled out of emails, documents can be moved around if they were added to an inappropriate repository, and documents can be locked to avoid incidental deletion, editing, or moving.

Security varies from repository to repository. For more information about the GMAS document repositories, visit the Document Repositories Job Aids.

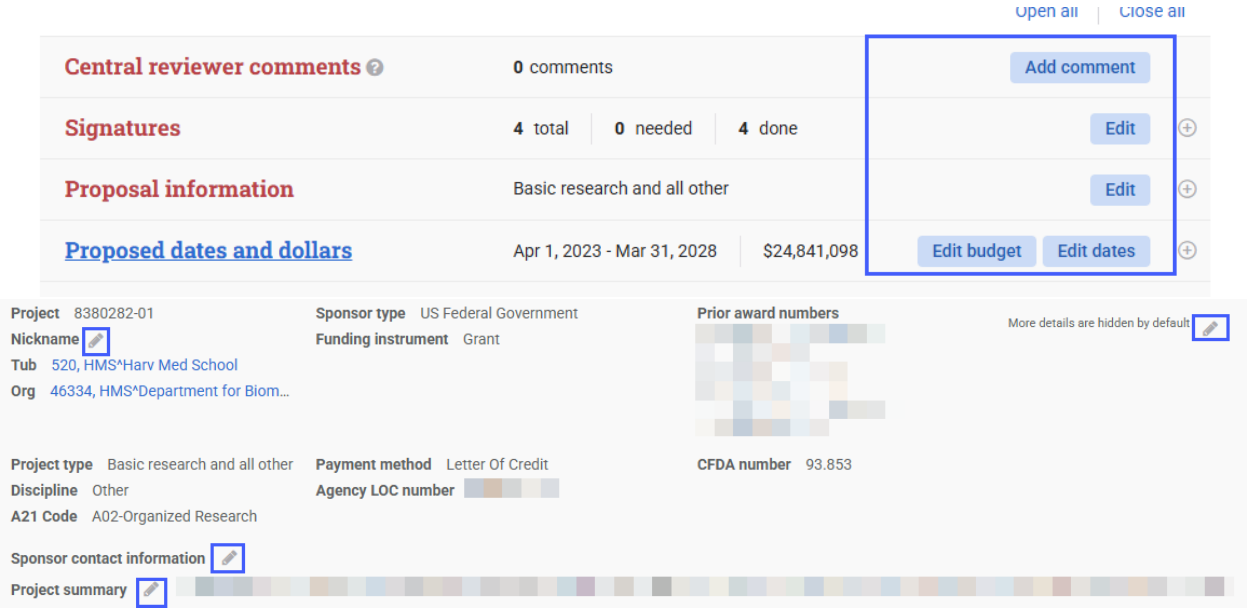
Action buttons/Edit functions

Action buttons will be found throughout the application. Primary actions that can be taken from a particular screen can be found at the top of the screen. Some screens will have one primary action button representing the common next step in a workflow with a secondary action button next to it representing less common possible next steps. If there are multiple common next steps, they will all be listed under the primary action.

If the logged in individual does not have the security to perform an action, or if the action is currently blocked, the action will show disabled with a tooltip explaining why the action cannot be taken.

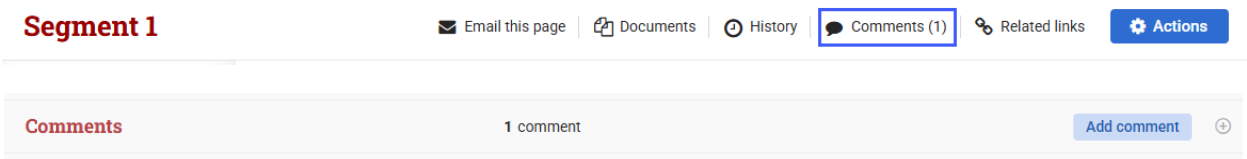


Edit functions will also be represented in the application with other buttons and pencil icons. These action types will only be visible by those with access to perform the actions.

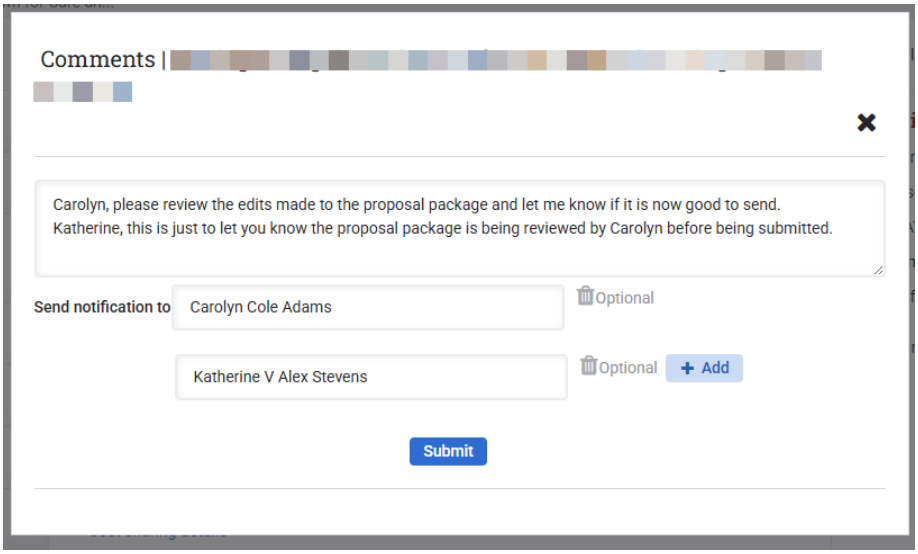


Comments

Comments can be left throughout the application and can be found at the top of a screen as a Comments link, or sometimes as a panel. Comments may represent an important note about the item (for example: a comment left on an approval screen may reflect an exception of the approval status at the time of award set-up), or house a back-and-forth conversation about the item (for example: several comments left on the request screen where notification recipients were added may reflect a conversation between the central submitting office and the department/school resolving an item prior to submission).



When a comment is being entered, there is an option to send that comment with a link back to the location where the comment was left in an email to an individual(s).



Comments can only be deleted by the person who entered them and should only be done so when the comment was added by mistake, or the comment needs to be corrected.

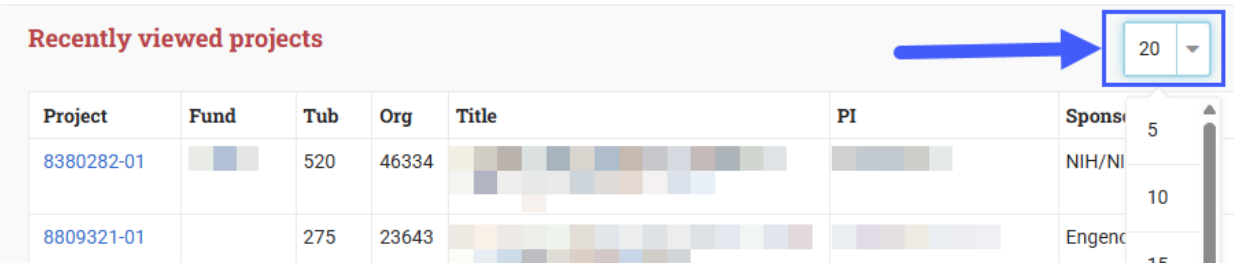
GMAS customizations

As GMAS transitions to the new look and feel, more customizations are being incorporated. Here are some current customizations that can be set within the application by person, by project, or by internal organization:

Person customizations

Recently viewed projects

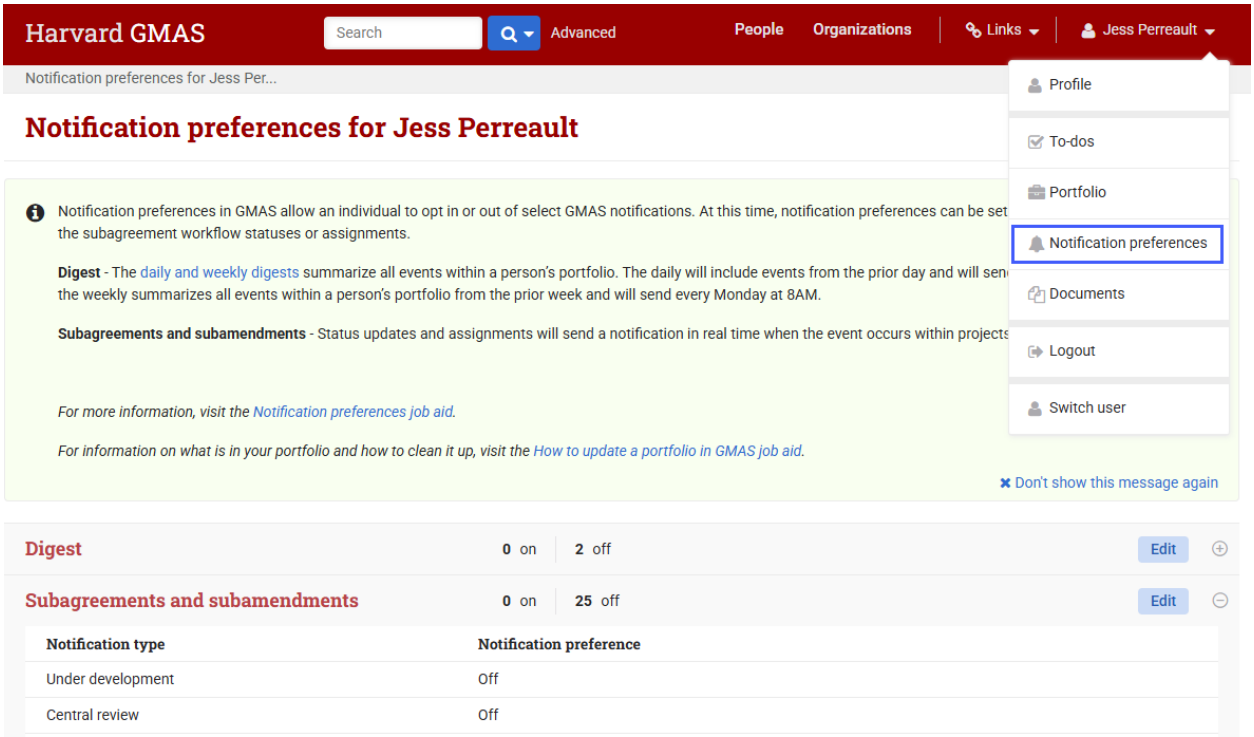
The GMAS homepage displays recently viewed projects. The number of recently viewed projects that are shown on the homepage can be customized. They will default to 20 and can be increased up to 100 and decreased down to 5.



GMAS notifications

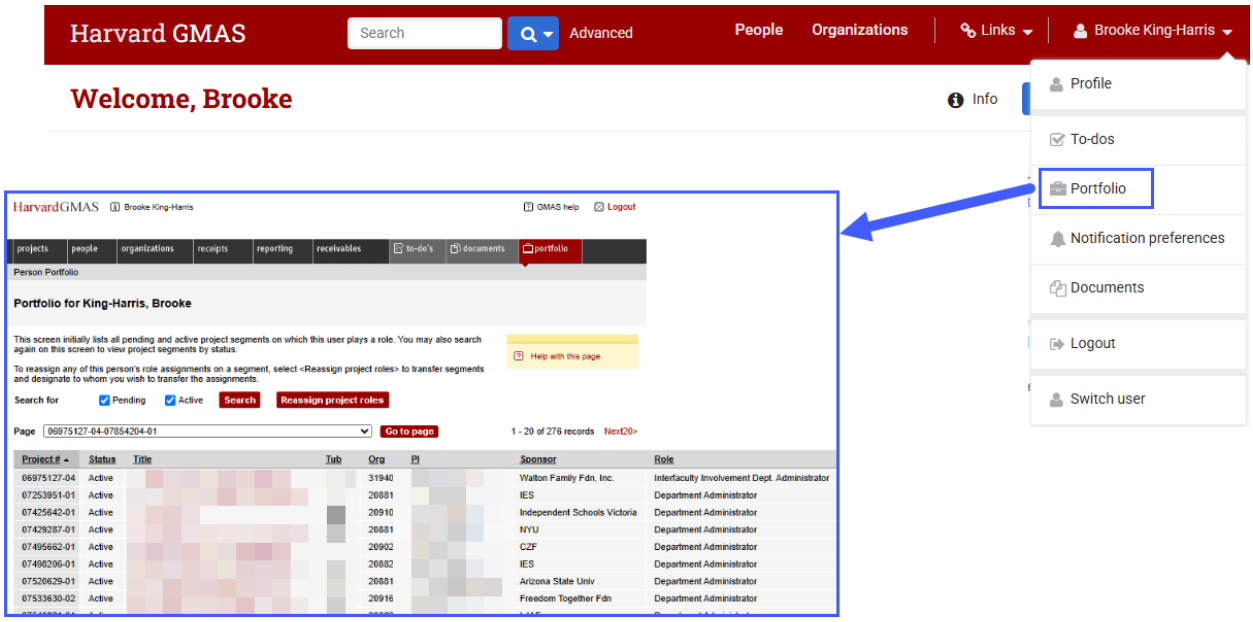
GMAS sends automatic notifications associated to actions taken in the system based on role. Some notifications related to subagreement and subamendment events can be configured in the "Notification preferences" section from your person profile (you can navigate there from your name in the upper right corner of any GMAS screen). From there you can also opt in to receive a daily or weekly digest of all GMAS events within your portfolio.

For more information see the Notification preferences job aid on the GMAS website.



Portfolio management

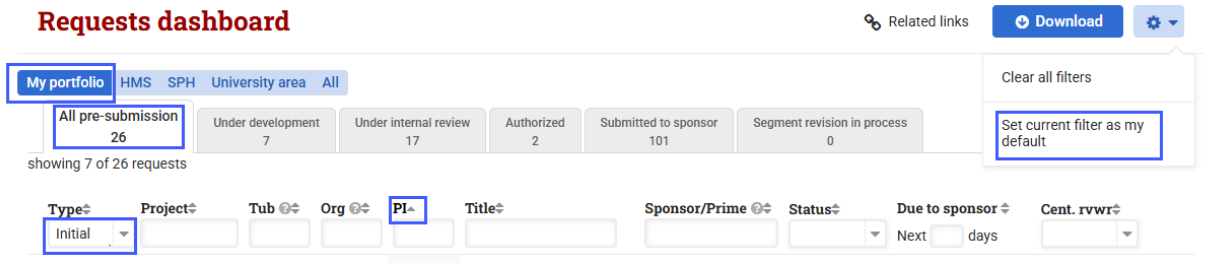
You can manage the projects in GMAS you are associated with through the "Portfolio" section from your person profile (you can navigate there from your name in the upper right corner of any GMAS screen).



For more information see the How to update a portfolio in GMAS job aid on the GMAS website.

Dashboard filter and sort preferences

Ongoing work can be tracked through the dashboards to the right from the GMAS homepage (see the Work management dashboards section below for more information). On the requests dashboard and subs dashboard you can set filters and sorts and save them as your default so that each time you navigate to the dashboard from a new logged in session the default will be applied.



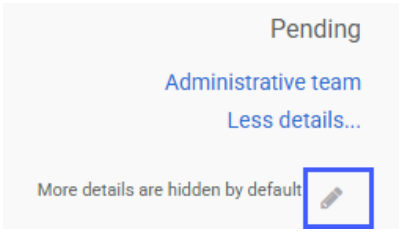
If defaults and sorts are made in the dashboards within a GMAS session, they will be saved for the duration of your session so that as you navigate in and out of the dashboard, your current sorts and filters don't reset.

Segment summary view preference

The segment homepage includes information about the project in the summary section at the top of the screen. Some of this information will be hidden by default but can be displayed by selecting "More details...".



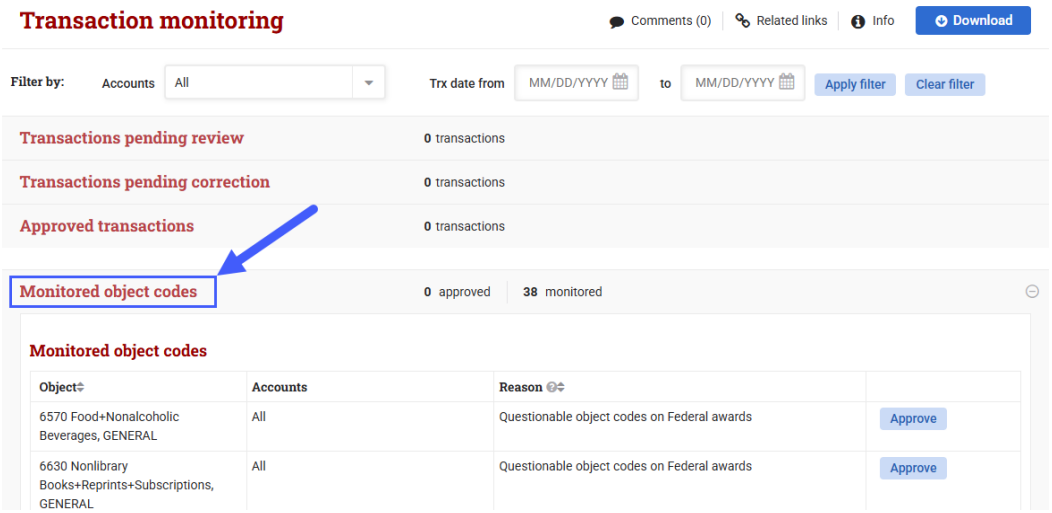
If your preference is to always have the summary display as open on all projects by default, you can set the default by selecting the pencil icon under the expanded view where the default is displayed to save it as open by default going forward.



Project customizations

Monitored object codes on accounts

Within each GMAS segment, there is a Transaction monitoring section. This area of the application tracks object codes that are deemed inappropriate based on the standard list of Cost Accounting Standards (CAS). See Managing Expenses on the OSP website for more information. In this section of the application, each account can be updated to add to the list of object codes for GMAS to monitor, or to proactively approve expenditures to object codes that are typically flagged if there is an exception to the rule. Updating the rules can be done in the Monitored object codes section of the Transaction monitoring screen.



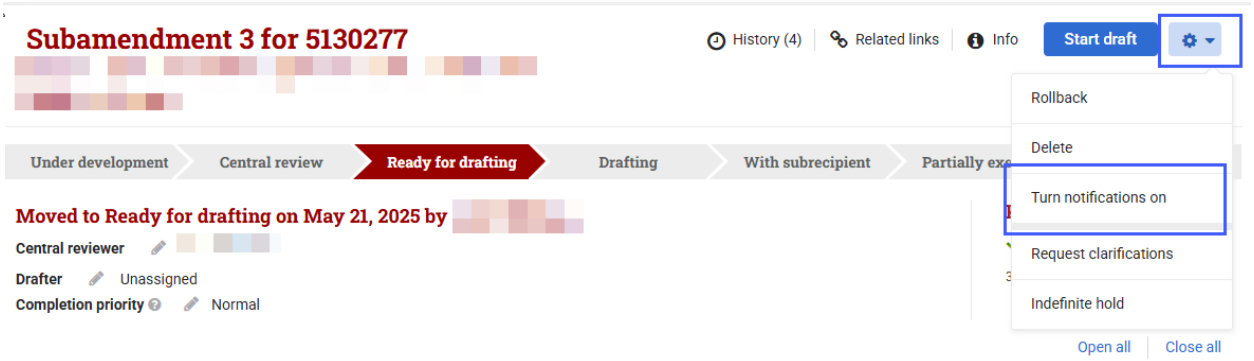
From this panel, selecting Approve on an object code that is set to be monitored will prompt selection of which accounts the object code is approved for, and standard

comment selection indicating the reason the object code is approved for the account(s). Selecting Add object code from the bottom of the open panel will prompt entry of an object code to monitor for, selection of which accounts should be monitored for expenses against that object code, and a space to add a comment about why the object code is now allowed for the account(s).

As spending occurs on the accounts, GMAS will flag any transactions to monitored objects to indicate they require removal or an explanation as to why the expense is allowable and show pre-approved transactions.
For more information on transaction monitoring, see the GMAS segment, Transaction monitoring section below.

Subagreement/Subamendment event notifications

Within each subagreement/subamendment that is in process within a GMAS segment, those with access to the segment can opt in to notifications for that subagreement/subamendment to get a notification each time the status is updated. To turn notifications on or off, navigate to the subagreement or subamendment that is in process, select the secondary action button at the top of the screen, and select Turn notifications on or Turn notifications off.



Organization customizations

School specific questions

Each tub (school) may request updates from the GMAS help desk to update their school specific questions that are answered in GMAS when a proposal is being built. The central submitting offices may also request updates to school specific questions for tubs within their spaces to track information that isn't currently built into the GMAS proposal entry process. School specific questions may be configured to be required or optional to answer. These questions must be formatted in a yes or no response format and may include links if appropriate or helpful. The school specific questions are reportable.

Default signature requirements for requests

Central, school, and department authorized representatives can request signature requirements to be configured in GMAS. Signature requirements are visible from the internal organization homepages which are accessible through organization search (see Internal and external organization profiles below). Signature requirements may be optional (defaults to not be included but can be selected by the person routing the request) and include instructional text for when it is appropriate to include, required (defaults to be included but can be removed by the person routing the request) with the option to remove it for outlier situations, or mandatory (defaults to be included and cannot be removed by the person routing the request). These configurations can help to support local unit policies relating to reviews and approvals. For more information about signature configurations visit the Updating Signature Requirements page on the GMAS website.

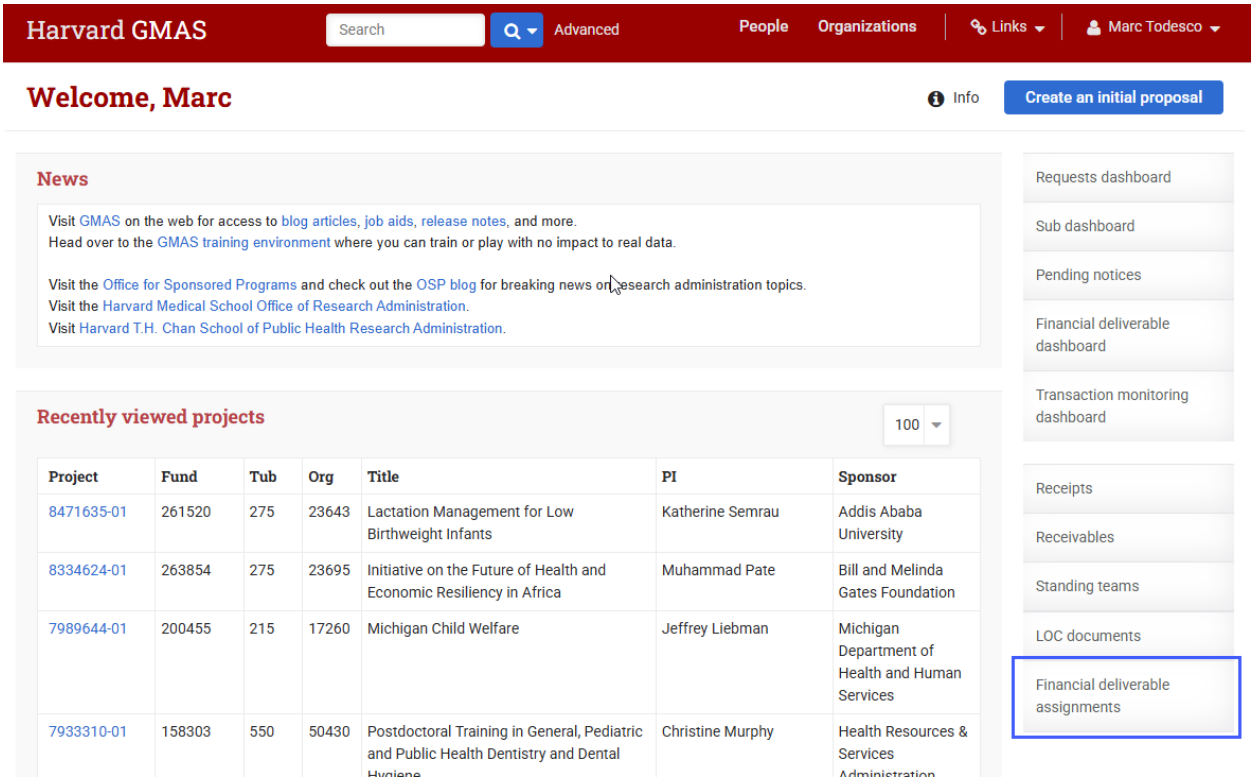
Default central reviewer

Central submitting offices can request updates to the default of the Central reviewer field on request homepages. The defaults are role based and can be unique per request type. These configurations in combination with the administration teams and standing teams are intended to support the central office's structure in how request types are reviewed and submitted. The central reviewers are listed in the Requests dashboard and can be used by individuals to organize their requests in process (see Dashboard filter and sort preferences above).

Financial deliverable assignments

Members of Research Finance in the Office for Sponsored Programs can configure the assignments of financial deliverables by report type and error. These assignments will override the assignments set by standing teams if the deliverable meets the configured criteria when it is brought into the financial deliverable dashboard. The screen to set the assignment rules can be found by those with the proper security to manage them from

the right navigation menu from the GMAS homepage.



Internal submission deadline policies

Each of the central submitting offices can request an update from the GMAS helpdesk to adjust the number of days prior to the sponsor deadline that a proposal must be routed to the central submitting office for review. These dates should be aligned with the central submitting offices' submission deadline policies. The configuration will determine what GMAS shows in the proposal as the "Due to central" date.

Document categories

Each document repository can have document categories incorporated to help identify key documents. These document categories are configurable, and the GMAS team works across various business partners to include the most appropriate document categories throughout the various repositories.

Labels

Labels can be added from segment, request, financial deliverable, subrecipient, and subagreement/subamendment homepages by members of the central submitting offices to highlight important information about a project in the Key information section. The

labels may be used to call out unique components of projects. The configuration of these labels is coordinated across various business partners.

GMAS modules

GMAS includes several modules that are meant to aid in the management of grants with the most notable being the GMAS segment. This section provides a brief overview of each of the different modules that make up GMAS.

GMAS project

A GMAS project has an identified period, amount of funding, line of research, and terms and conditions. A project is also divided into one or more segments and periods and at any one time has one sponsor, one responsible PI, and one responsible tub/org. All segments related to a project typically share an activity value.

The project homepage is accessible from the segment chooser drop-down on the segment homepage. For information about how to access the project homepage, see the GMAS segments, Actions bar section below.

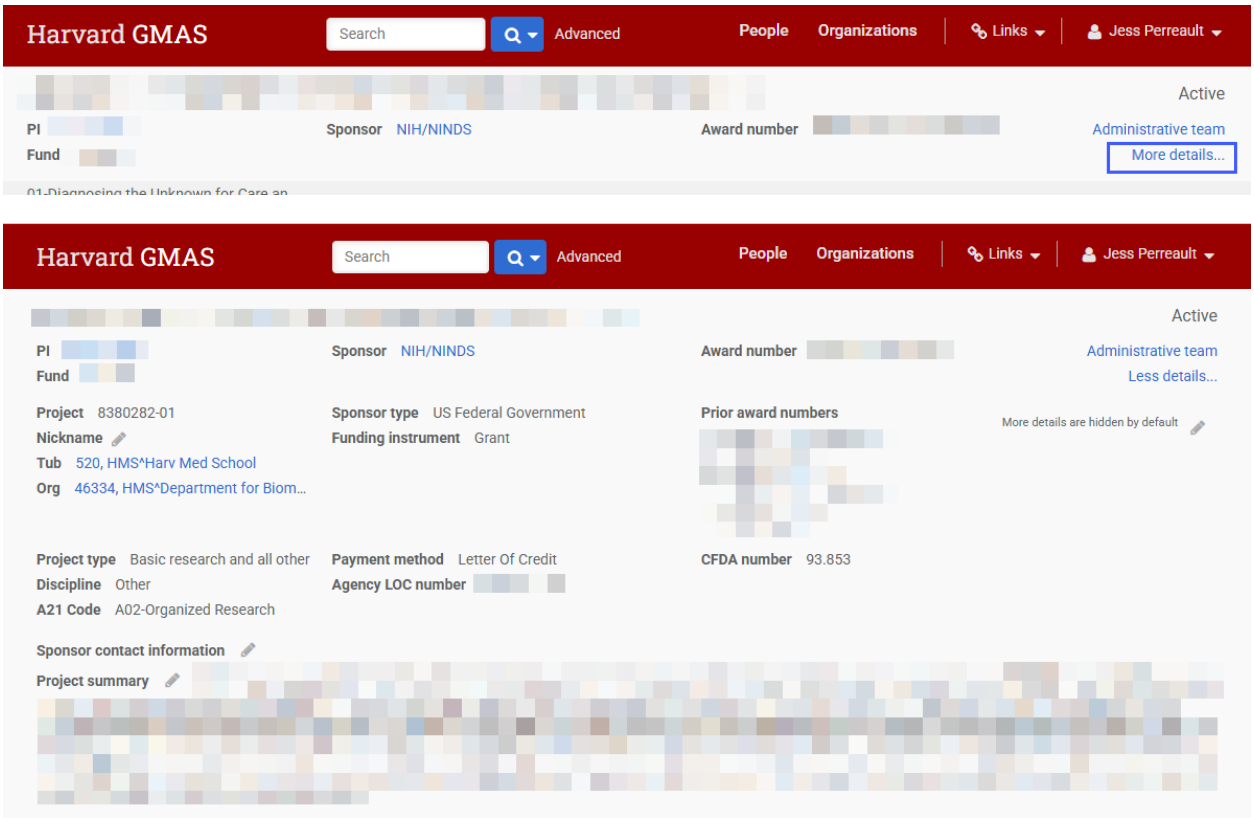
GMAS segment

A GMAS segment represents a distinct period, amount of funding, and scope of work. Each active segment has its own unique fund number. The first segment of a project (see more information about GMAS project above) is created by an initial proposal, and all subsequent segments are created by competing renewals.

GMAS segments are comprised of many parts, all of which are accessible from the segment homepage.

Segment summary

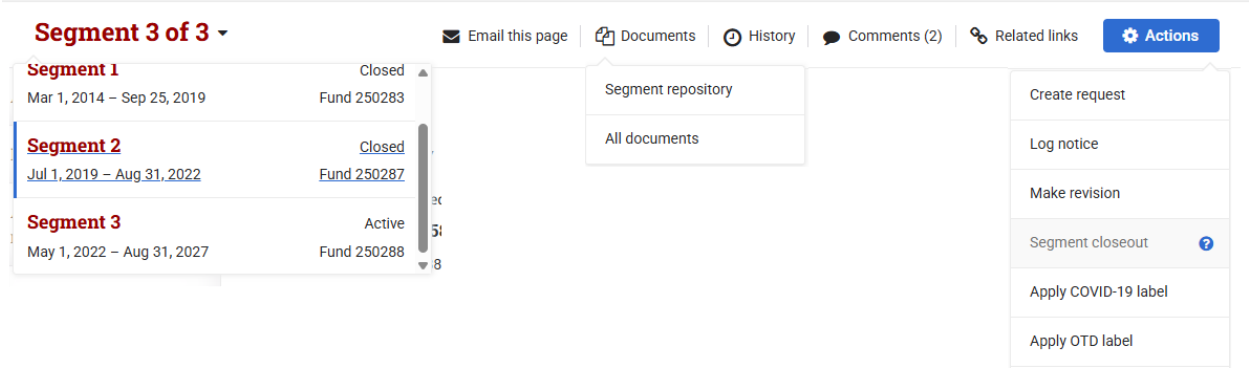
Basic information about the segment including the PI, title, sponsor, department, award number, project nickname, sponsor contact information, and more can be found in the segment summary at the top of the segment homepage. The segment summary expands to show all information by selecting the “More details” link on the right of the summary. See the GMAS customizations section for how to change the default.



Actions bar

The segment actions bar includes options to perform several actions.

- If there are multiple segments associated with the project, the segment number will have a dropdown menu which allows navigation between related segments and the project homepage.
- The “Email this page” link opens your email client with a prepopulated link to the segment homepage to easily direct people into the segment.
- Documents provide links to the Segment document repository, or to the All documents screen where all the segments document repositories are listed.
- History is where all events that took place within the segment can be viewed.
- Comments include notes and conversations related to the segment.
- Related links provide links that may be helpful while working in the segment.
- The actions button menu includes options to create a request, log a sponsor notice, make a segment revision (create an action memo), perform a segment closeout, or apply a label to the segment.

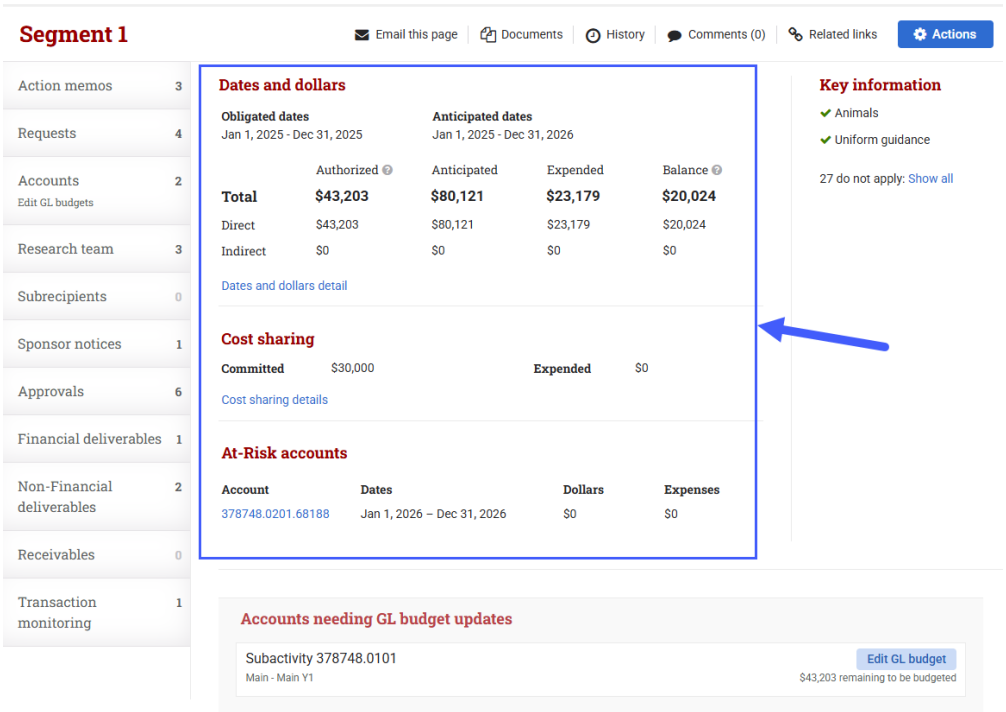


Dates and dollars

The **dates and dollars** section on the segment homepage will display the proposed dates and dollars on a pending segment, or the obligated (authorized by the sponsor) and anticipated (expected by the sponsor) dates and dollars on an active segment. If the segment is active, there will be a link to more dates and dollars detail.

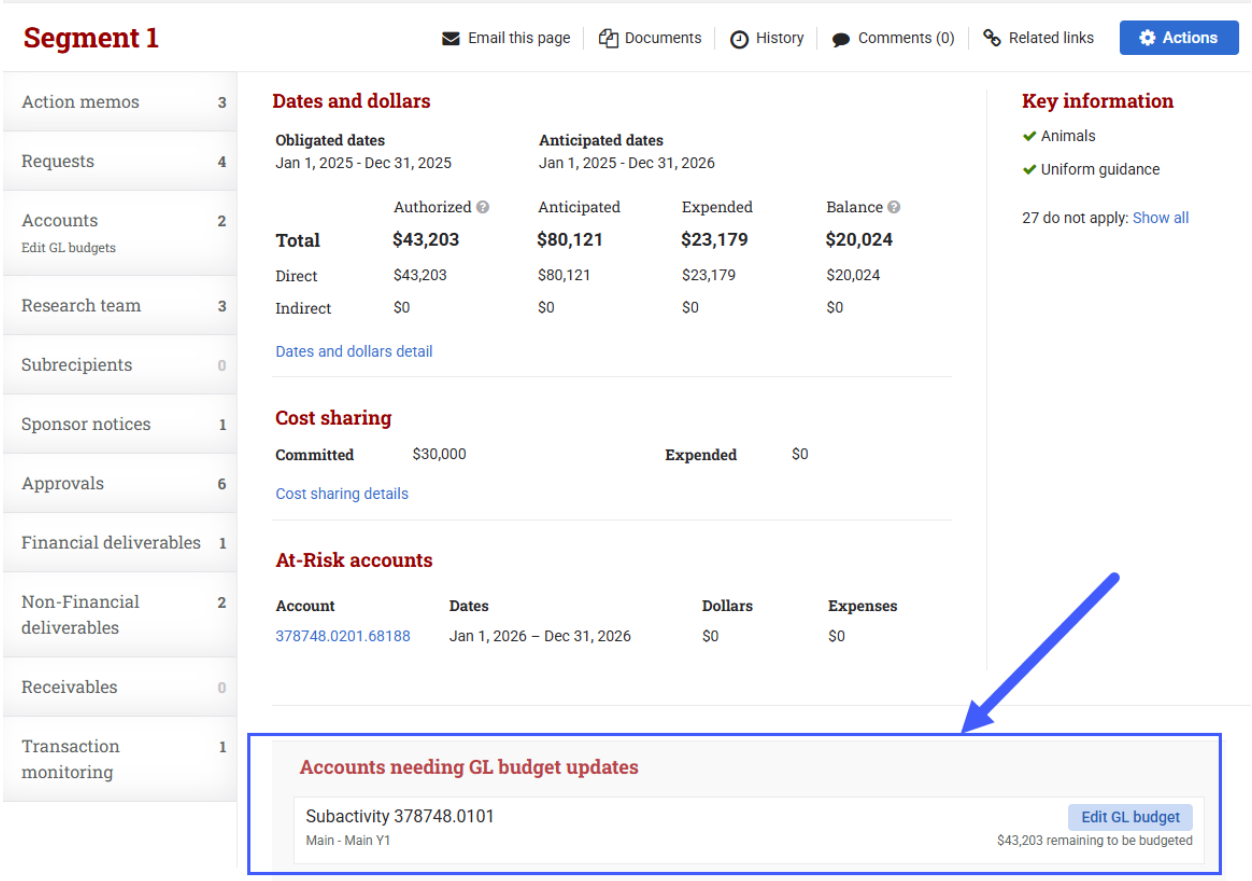
If there is committed **cost sharing** and/or cost sharing expenses associated with the segment, they will be displayed in the dates and dollars section with a link to more cost sharing details.

If there are any accounts in the segment that are flagged as **at-risk** (spending is happening prior to sponsor obligation of dates and dollars) they will be displayed in the dates and dollars section with links to details of the accounts that are at-risk.



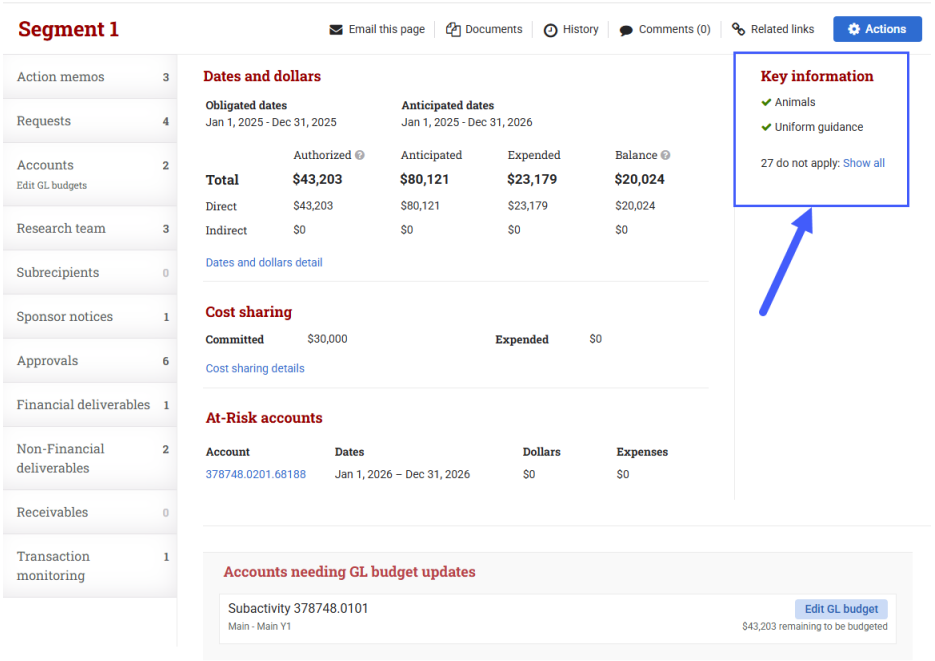
Segment to-dos/work in progress

The work in progress section can be found underneath the dates and dollars. When there are items that need action on the segment, they will be listed in this section.



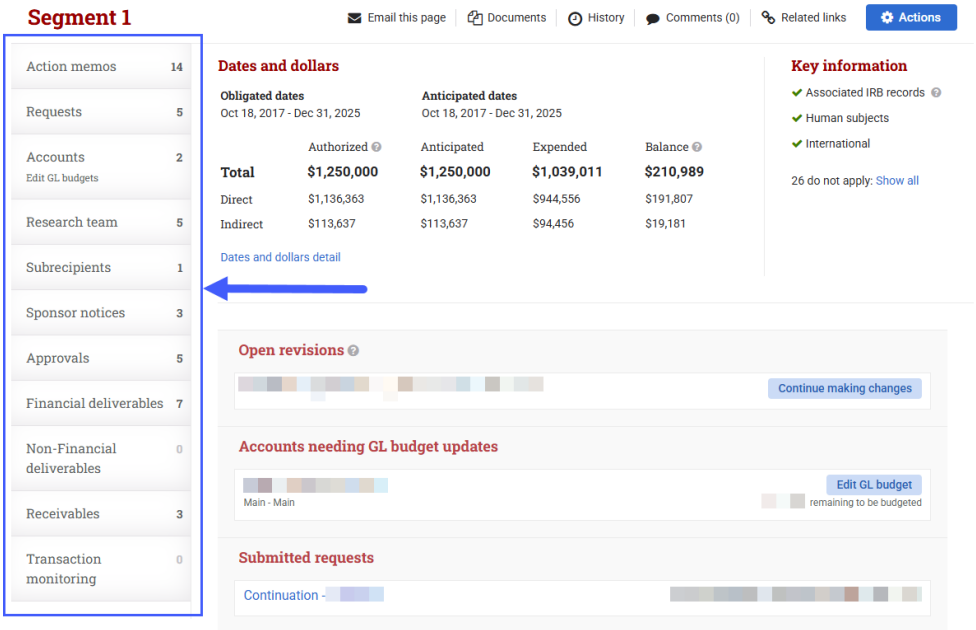
Key information

The segment key information section flags items that were identified as applicable to the segment. The full list of possible key information items can be found in the “show all” link, but only the applicable key information items will be highlighted by default.



Segment left navigation menu

The left navigation menu from the segment homepage links to list screens for all the different segment modules to navigate further into the segment data.



Action memos

Action memos are snapshots of actions that were taken in the segment. These actions can be triggered by a sponsor notice, an authorized internal request, or an administrative action. Action memos are always created through the committal of a

segment revision processed by one of the central submitting offices. All action memos can be accessed from the “Action memos” option on the left screen menu from the segment homepage, associated awarded request homepages, associated sponsor notice homepages, and associated subagreement homepages.

Requests

Requests represent proposals and other requests submitted to the sponsor, and internal action requests to update the segment. Requests are typically initiated by a department administrator or lab administrator and are routed to and submitted by the central submitting office. The segment requests include a list of all requests that have been initiated from the segment. From the requests list each request can be drilled into by selecting the request type hyperlink, and a new request can be initiated or notice logged from the “Actions” button.

Each request has its own set of data requirements, signature requirements, approval requirements, accounts, subrecipients, research team members, key information, comments, documents, etc.

Accounts

Segment accounts include a list of all accounts that are used in the financial management of the award. The list of accounts includes Main, Part-of, Participant support cost, Paid obligation, and Subagreement accounts. From the accounts list each account can be drilled into by selecting the account description hyperlink, a GL budget can be added/edited by selecting the “Edit GL budget” button, and a request to create a new account(s) or create an at-risk account(s) can be initiated from the “Actions” button.

Research team

The research team includes a list of all individuals who have been identified as research team members on the award. Confirming the research team or requesting an edit to the research team can be done from the research team list. End dated research team members will appear hidden in a panel called “End-dated research team members” towards the bottom of the screen, and any individual with payroll costing on an account associated with the segment that is not on the research team will appear at the bottom of the screen in a panel called “Additional people with payroll costing for this segment”.

For more information about research teams, visit the Research team job aids.

Sponsor notices

The sponsor notices page is where the initial award and all award amendments associated with the segment will be recorded. The sponsor notice links will lead to the sponsor notice homepage which will display more information and include links to the action memos that were generated from sponsor notices, the requests the notice was associated with, and the actual sponsor notice document.

Approvals

A full list of approvals, and other associated records triggered either by data in the GMAS segment or the GMAS project ID being linked from another system will be listed on the approvals screen. The screen is broken into different sections.

- Approval attributes will display which approval items do and do not apply to the segment.
- IRB studies will display outside of an IRB approval if the human subjects approval attribute is listed as no, but there is a record of an IRB study that has been linked to the GMAS project ID in the ESTR IRB application.
- Agreement (DUA) and Data Safety records will be displayed if the records in those applications have been linked to the GMAS project ID in the Agreements (DUA) or Data Safety applications.
- Attestations and trainings will display any attestation or training requirements (such as MFTRP annual attestations and Research Security training requirements) that are relevant to members of the segments research team.
- Approvals that GMAS has generated will be listed at the bottom broken out by approvals that still need actions and approvals that are done.

Financial deliverables

The Financial deliverables screen includes the schedule of outstanding and submitted invoices, financial reports, and internal reviews that were scheduled by Research Finance in the Office for Sponsored Programs based on the sponsor notices. The financial deliverable links will lead to the deliverable homepage which provides a detailed view of the deliverable. The financial deliverable that was approved or submitted to sponsor will be categorized in the document repository.

Non-financial deliverables

The Non-financial deliverables screen includes the schedule of outstanding and submitted non-financial reports that have either been scheduled by Department Administrators or members of Research Finance. From this screen, most members of the administrative team can schedule any applicable non-financial deliverables which can be set to send reminders to members of the administrative team. The non-financial deliverable links will lead to the deliverable homepage which will provide a detailed view of the deliverable including links to associated continuations requests if the type is NIH RPPR and the non-financial documents provided to the sponsor if they were recorded.

Receivables

The Receivables module from the segment homepage left navigation menu will provide a list of all receivables paid, partially paid, or outstanding on the segment. Receivables are created when invoices are submitted from the Financial deliverables module (see Financial deliverables above) or created manually. Receivable payments are tracked by Receipts in GMAS. For more information, see the Payment management section below.

Transaction monitoring

The Transaction monitoring module supports the monitoring of financials relating to a segment throughout the post-award life cycle to ensure expenditures are allowable, allocable, reasonable, and in accordance with the terms of the award. Transaction monitoring is where questionable expenses on a segment can be reviewed and either marked as appropriate (approved) or flagged for removal from the account(s).

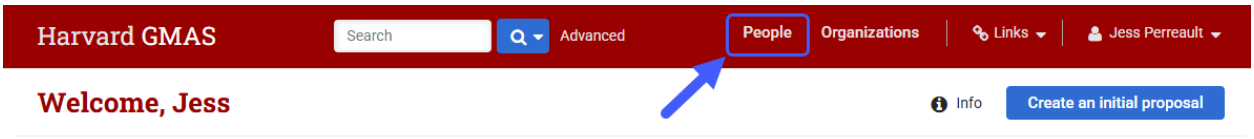
A list of segments that have transactions flagged as needing removal or approval can be found in the Transaction monitoring dashboard from the GMAS homepage (see Work management dashboards below). For information about how to update the monitored objects, see the GMAS customizations, Monitored object codes on accounts section above.

Person profiles

GMAS person profiles make up both Harvard University ID (HUID) person records that are brought into GMAS from HR systems, and person profiles created manually that either represent individuals outside of Harvard (such as a subrecipient PI or administrator) or those who have not yet received their HUID and been brought into GMAS from HR systems. A person profile contains items relating to the individual such

as contact information, GMAS to-dos, GMAS notification preferences, affiliations to GMAS segments (“Portfolio” shows segments where the individual appears on the administrative team, and ”Research teams” shows segments where the individual appears on the research team), active and pending report download, and more.

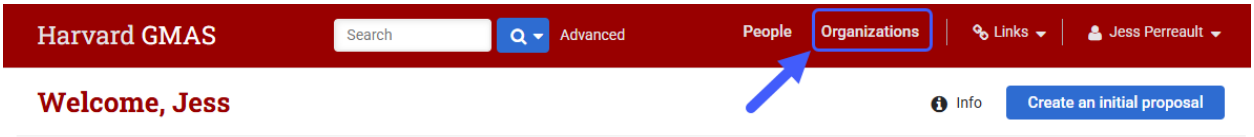
Person profiles can be found in GMAS from the global navigation menu “People” link, or from any person hyperlinked name within the application.



Internal and external organization profiles

Internal Harvard organizations (tubs/schools, orgs/departments, etc.) and external organizations (sponsors, subrecipients, prime sponsors, etc.) have their own profiles in GMAS that provide more details about the entity. Internal organization profiles include information such as chart of account value ranges, and request signature rules. External organization profiles include a list of segments that are associated with the organization, organization risk assessment information, basic organizational information, links, and more.
Internal organizations feed into GMAS automatically. External organizations are created in GMAS by individuals. The Office for Sponsored Programs (OSP) is responsible for activating external organizations in GMAS after they are created. More information about that process can be found on the OSP website on the New Organization/Sponsor Process page.

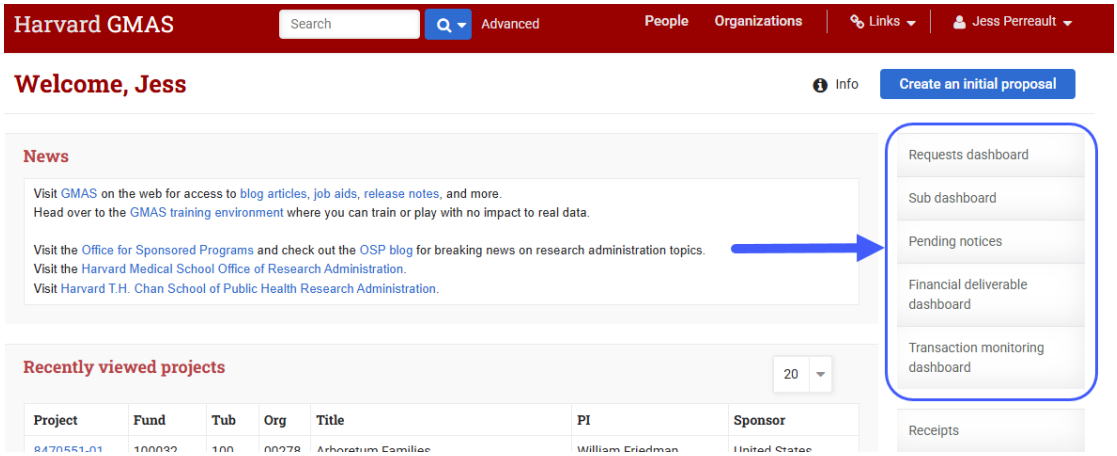
Organization profiles can be found in GMAS from the global navigation menu “Organizations” link, or from any organization hyperlinked name within the application.



Search hint: If you cannot find an organization, try different variations of the name (ex: Massachusetts Gen will provide results for Massachusetts General Hospital, but Mass Gen will not).

Work management dashboards

There are 5 dashboards in GMAS that were designed to assist in the management of GMAS segments. All dashboards can be found on the right screen menu from the GMAS homepage.



These dashboards provide information about relevant items in an incomplete state. Requests, Sub, and Financial deliverable dashboards provide information about where those items are in the workflow and who they are assigned to. The Pending notices dashboard provides information about sponsor notices that have been received but not processed yet. The Transaction monitoring dashboard provides information about all transactions that require review to either be approved or removed from the segments.

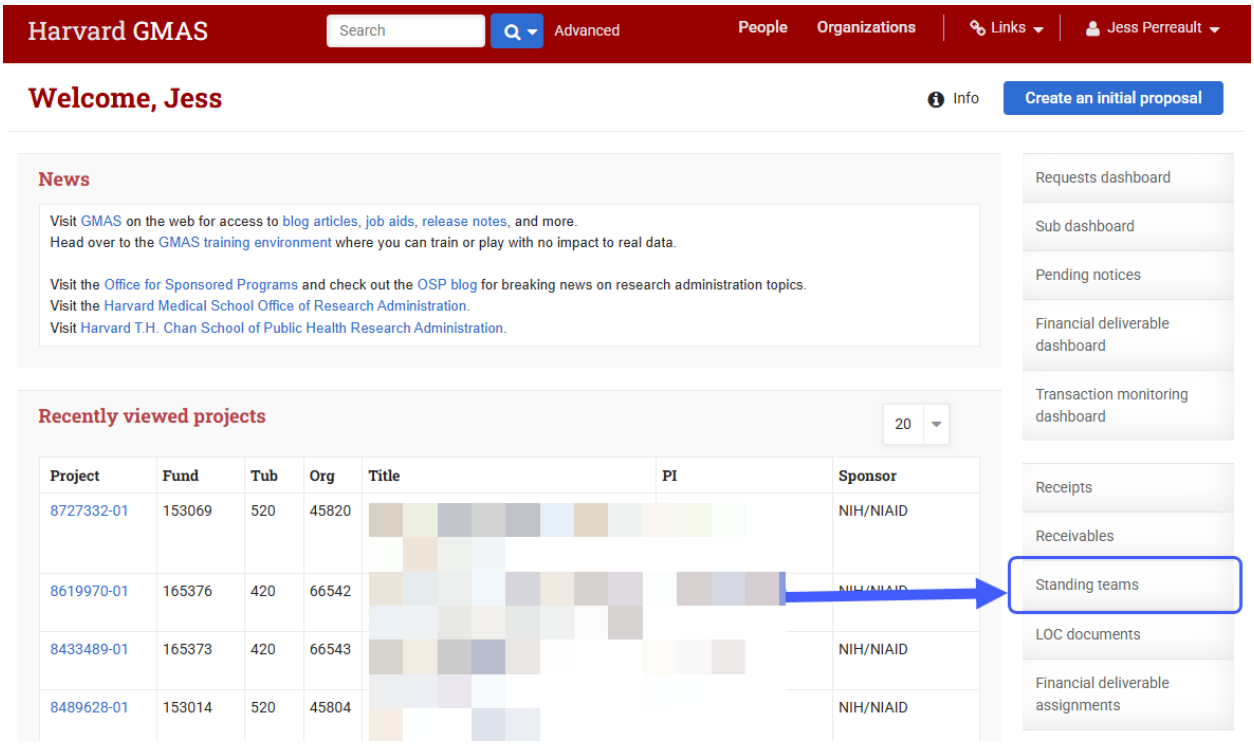
These dashboards will display data within the scope of an individual's security. Some dashboards include the ability to download all dashboard data into excel. See the Dashboard filter and sort preferences section above for more info on saving preferences in these dashboards.

Security management

Security for GMAS is managed directly in the application by GMAS authorized requestors (responsible for creation and editing of standing team scope and responsible for yearly access reviews), standing team owners (responsible for the oversight of standing team access and assignments), and administrators of GMAS segments (responsible for segment specific access).

The scope of an individual's security can be accessed from their person profile in both the Portfolio section (which shows all segment administrative teams an individual is on and the role they play on it), and the Teams panel which will provide a list of standing teams the individual is on. For information about a person's profile, see the Person profiles section above.

Standing team owners can find the full listing of standing teams they manage from their own person profile Teams panel, or they can search for a specific standing team from the Standing teams option in the right screen menu from the GMAS homepage.



Standing team security

Standing teams define access to GMAS based on a combination of roles, orgs, and PIs. Each team is managed by a standing team owner, who can add or remove members and make assignments.

Members of a standing team have access to all GMAS segments that match the team's defined scope. When new segments are created that align with the team's role, org, and PI combinations, team members with assignments for the org and PI combination are automatically added to the segment's administrative team in the role designated by the assignment.

Examples of standing team access:

- *Stephanie is on a standing team that has org 31570 and the department administrator role. She does not have an assignment on the standing team.*
    - *Stephanie can search in GMAS for all segments where org 31570 is the primary managing org.*
    - *While in any segment with the primary managing org 31570, Stephanie can create and route requests and perform all other department administrator activities.*

- *Stephanie will not receive any notifications from GMAS about segments because she is not on the administrative teams due to lack of a standing team assignment.*

- *Oscar is on a standing team that has org 31570 and the department administrator role. He also has an assignment for the combination of org 31570 and department administrator role.*
  - *Oscar can search in GMAS for all segments where org 31570 is the primary managing org.*
  - *While in any segment with the primary managing org 31570, Oscar can create and route requests and perform all other department administrator activities.*
  - *Oscar will receive notifications from GMAS about segments in org 31570 because he is on the administrative teams due to his standing team assignment.*

- *Katherine is on a standing team that has org 31570, the department administrator role, and PI Stan Smith. She also has an assignment for the combination of org 31570, PI Stan Smith, and department administrator role.*
  - *Katherine can search in GMAS for all segments where org 31570 is the primary managing org and the PI is Stan Smith.*
    - *She cannot search for GMAS segments where org 31570 is the primary managing org and the PI is anyone other than Stan Smith.*
  - *While in any segment with the primary managing org 31570 and PI Stan Smith, Katherine can create and route requests and perform all other department administrator activities.*
  - *Katherine will receive notifications from GMAS about segments in org 31570 where the PI is Stan Smith because she is on the administrative teams due to her standing team assignment.*

- *Ruth is on a standing team that has org 31570, the department administrator role, and the department approver role. She has been given an assignment for the combination of org 31570, and the department approver role.*
  - *Ruth can search in GMAS for all segments where org 31570 is the primary managing org.*

- *While in any segment with the primary managing org 31570, Ruth can create and route requests and perform all other department administrator activities.*
- *Ruth will not receive notifications from GMAS about segments in org 31570 because she is not on the administrative teams due to lack of a standing team assignment.*
- *Ruth will default in the department approver signatory role when a request is locked and routed for requests that require it under org 31570.*
- *Ruth can sign off on any request under org 31570 where the department approver sign off is needed, even if she isn't the individual listed as required to sign. (The request will show that Ruth signed on behalf of the individual listed.)*

Administrative team security

Administrative teams determine who can access and perform certain actions on a segment in GMAS. Administrative teams include the PI and Mentor and are informed by standing team assignments when the segment is created. Administrative teams can be additionally managed by those in a central or department administrator role on the administrative team.

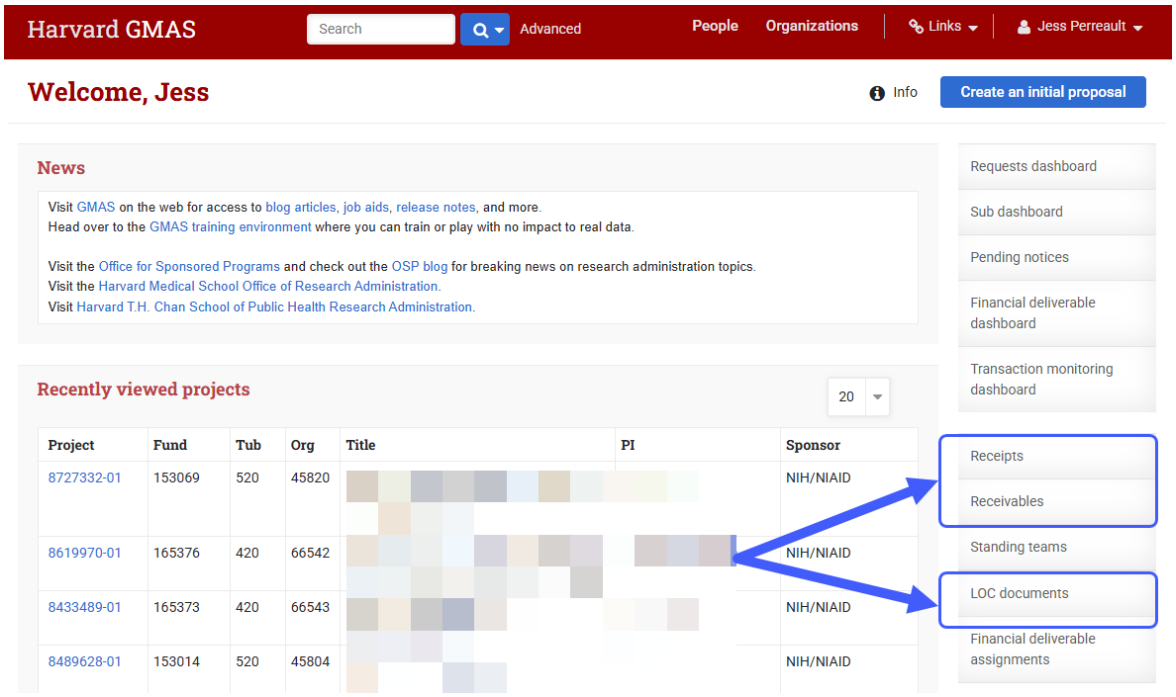
If an individual is only on an administrative team and not on a standing team with the segment scope, they will have access to the segment with permissions designated by the role they were assigned, but they will lose access to the segment once it is closed.

Signatory security

Individuals may default into signatory roles on requests based on standing team assignments (see the Ruth example above in the Standing team-based access examples), but they can also be added as a signatory at the request level. When an individual is added as a required signatory upon locking and routing a request, the individual added into the signatory role will gain temporary access to the segment to review the request and sign it. Their access will remain intact until they complete the sign-off process. Once complete, they will no longer be able to access the segment. If continued access is needed, the signatory should be added to the administrative team, or a standing team (whichever is most appropriate).

Payment management

Members of Research Finance in the Office for Sponsored Programs and select others have access to search for and view information about outstanding receivables (payments pending from sponsors on segments based on invoicing), receipts (payments made by sponsors and applied to receivables), and LOC documents (documents relating to the draw down of federal funds). These payment management modules in GMAS are all accessible to those with access from the right screen menu from the GMAS homepage. Receivables related to a particular segment can be viewed by those with access to the segment homepage. See the GMAS segment, Receivables section above for more information.



GMAS integrations

GMAS integrates with many other Harvard applications. These integrations allow GMAS to send and receive information relating to many aspects of sponsored projects in GMAS. Integrated systems include, but are not limited to:

- Outside Activities and Interest Reporting (OAIR) system
    - Send and receive information about sponsored projects and their research teams.
- Agreements DUA

    - Receive information about Agreements that are linked to GMAS project ID records.

- Data Safety
    - Receive information about Data Safety records that are linked to GMAS project ID records.
- ESTR IRB
    - Receive information about IRB records that are linked to GMAS project ID records.
- Research Administration Portal
    - Send information about research team members on sponsored projects and receive status updates for Malign Foreign Talent Recruitment Program (MFTRP) annual attestations.
- Harvard Data Warehouse
    - Share and receive data relating to sponsored projects.
- Harvard Training Portal
    - Send information about individuals on research teams.
    - Receive information about training statuses.
- Oracle e-Biz
    - Send sponsored account information and receive reconciliation updates. Send NE interest journals and indirect cost rate. Retrieve CCID validations for GL budget.
- HR systems
    - Receive information about people in Harvard systems.
- Email
    - Send emails to sponsors and GMAS users.

Helpful links

- GMAS website

System links

- Grants Management Application Suite (GMAS)
- GMAS Training Environment

Documentation updates tracker

Update date	Description of updates
6/4/2026	Updated links
8/5/2025	Creation of job aid