

Updating Signature Requirements in GMAS

This job aid covers requesting updates to required signatures in GMAS.

Prerequisites

This job aid assumes that the reader understands the basic functionality and terminology of GMAS.

Topics

1. [How Signatures Work](#)
2. [How users default into roles](#)
3. [Form in Service Now](#)
4. [Roles](#)
5. [Request Types](#)

How Signatures Work

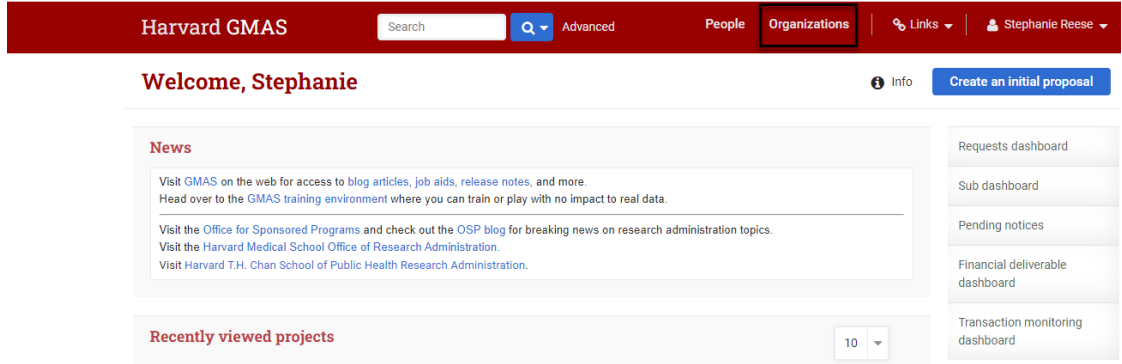
Different roles can be set as signatory requirements that are either mandatory or optional on requests in GMAS. Those roles will appear on the list of signatures needed when a request is locked and routed. If mandatory is selected, the signature requirement cannot be removed, if optional is selected the signature requirement will appear on the list of signatures but will default as unchecked. Descriptive text can appear when a request is locked and routed to explain when to select an optional signature. The signatories can be required at the department, school or central level.

Existing signature requirements can be found on the internal organization homepage in GMAS for each Org/Tub.

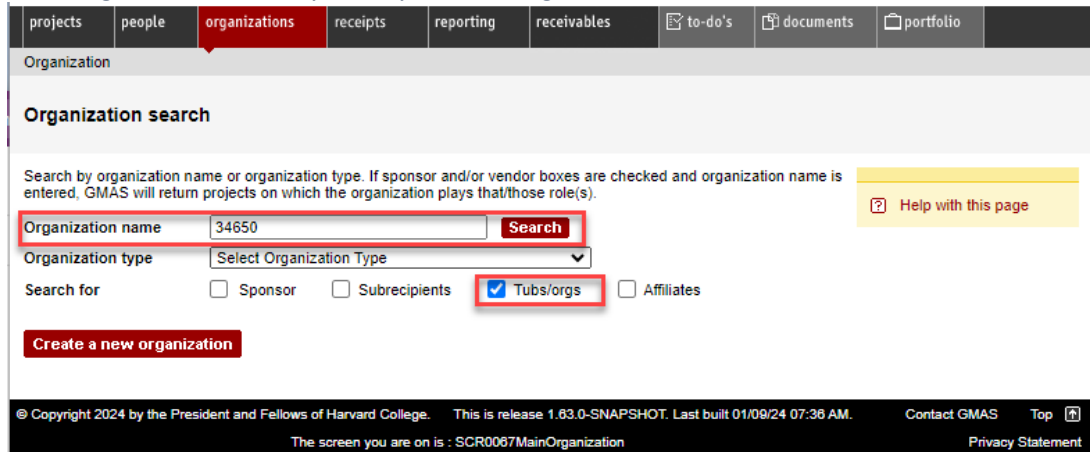
- When viewing an Org, the signatures required for the org, the corresponding tub, and corresponding central office will show.
- When viewing a Tub, the signatures required for the tub and corresponding central office will show.
- When viewing a Central office only the signatures required for the central office will display

To navigate to the internal organization homepage following these steps:

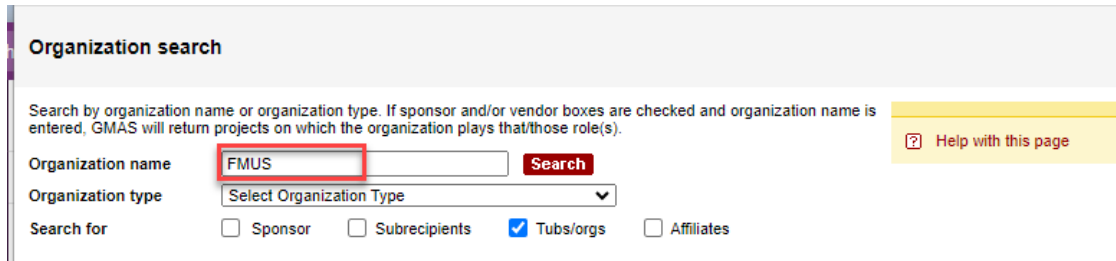
1. From the GMAS homepage select Organizations at the top



2. Type in the organization number or name that you are looking to view. Check the box next to Tubs/orgs. This will show you only internal organizations. Then click "Search"



OR



- Results will display and you can choose the correct organization to view by clicking on the name.

Organization search

Search by organization name or organization type. If sponsor and/or vendor boxes are checked and organization name is entered, GMAS will return projects on which the organization plays that/those role(s).

Organization name: [Help with this page](#)

Organization type:

Search for: Sponsor Subrecipients Tubs/orgs Affiliates

Page: 1 - 1 of 1 records

Organization name	Parent organization name	Organization type
34650 - FMUS^HMSC Admin	FMUS^FAS Museums	Org

(A)* indicates that the org is an affiliate org.

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The screen you are on is : SCR0007MainOrganization

- The organization homepage will load. To view signatures, scroll to the “Required signatures” section.

FMUS^HMSC Admin

Signatory	Mandatory	Description	Requests	
Org Signatures				
Department Chair Signatory	No	As applicable based on sponsor rules.	Initial proposal Continuation Supplement Competing renewal	<input type="button" value="Edit"/>
Mentor	No		Supplement Competing renewal Initial proposal	<input type="button" value="Edit"/>
Tub Signatures				
Harvard Global Signatory	No		Supplement At Risk account(s)	
OTD/OTL Signatory	Yes		Continuation Supplement New account(s) At Risk account(s)	
Principal Investigator	Yes		All	
Dean/Designee Signatory	No	As applicable.	All	
Central Signatures				
Fellow Investigator	Yes		Continuation Supplement	
Principal Investigator	No	Sign for Just in Time	Just-in-time	

Required signatures set at the Central office level override the school and department level requirements and the school level signatures override the department level requirements. For example if a PI is not required as a signatory at the department or school level but the central office requires it, the PI will be a required signatory.

There is an ability to set required signatures at the request level. This allows the ability to set different signatures across different request types on the same project. For example, the Dean/Designee Signatory role maybe be

required on Initial Proposals only and the role University Authorized Signatory may be required on Supplements and Continuations. This can be configured via a request in Service Now. The section "Form in Service Now" further reviews how to fill out and submit the form required to make changes.

How users default into roles

When locking and routing a proposal, the roles that default in are generated by the above explained requirements. The names that default into these roles are generated by people who appear are based on standing teams for the org/tub. If there is only one person assigned to the signature role for the given Tub/Org, the name shows, if there is more than one person, or no person, assigned to the signature role, then no name shows and one can be entered.

Form in Service Now

The GMAS team is responsible for making updates to signature requirements. The form, found [here](#), must be submitted for changes to be made.

This form is to be submitted by individuals who have authority to set signature requirements on behalf of their office.

The form must indicate whether a signature role is being added, edited or deleted. In the form list all orgs and/or tubs the changes should be made to.

The form must include the following:

- Role(s) being changed (Role options are found below in the "[Roles](#)" section).
 - If the role is Mandatory, Recommended or Optional (If mandatory is selected, the signature requirement cannot be removed when requests are locked and routed in GMAS, if recommended is selected, the signature role will default to checked but can be unchecked, if optional is selected the signature requirement will appear on the list of signatures when the request is locked and routed but will default as unchecked)
 - Descriptive text (This is required if the role is Optional. The text will appear when a request is locked and routed in GMAS and is often used to explain when to select an optional signature requirement during the lock and route process.)
 - Request type(s) the role should be associated to (Request types are found below in the "[Request Types](#)" section).
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Roles

The signatory roles that can be chosen for requests are:

- Department Approver
- Central Administrator
- Dean/Designee Signatory
- Department Chair Signatory
- Fellow Investigator
- Financial Dean/Designee Signatory
- Harvard Global Signatory
- Laboratory Director Signatory
- Mentor
- OTD/OTL Signatory
- Principal
- Provost
- Sponsored Programs Approver
- Cost Share Signatory (only available if central office org selected)
- University Authorized Signatory (only available if central office org selected)

Offices can work with the GMAS team to create roles that function similarly to the Central Administrator role. These new roles receive the same Todos and Notifications as the Central Administrator but can be configured to appear as a required signature on different request types to allow the correct people to sign on each type of request.

Request Types

The types of requests that can have signatories configured are:

- Initial Proposal
 - Just-in-Time
 - Continuation
 - Supplement
 - Competing renewal
 - Cost sharing
 - International collaboration and activities
 - Edit research team
 - Confirm research team
 - Pre-award expenditure
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- Carryforward
- No-cost extension
- Equipment rebudget
- Subrecipient addition at no additional cost
- Interfaculty addition at no additional cost
- Change PI
- Rebudget restricted categories
- Early termination
- New account(s)
- At Risk account(s)
- Change Tub/Org
- Billing agreement