User Role(s): Department Administrator Lab Administrator Central Administrator Last Updated: 2/14/2023

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Overview

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

Project Component Repositories	Function
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.

Document Repositories Job Aid User Role(s): Department Administrator

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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 repository is one repository shared across the cost sharing approval, cost sharing form, and cost sharing request.
Financial Deliverables Repository	• Exists for each financial deliverable within a project segment and is available after the financial deliverables are scheduled
Transaction Monitoring Repository	• Exists for each project segment and is available when a segment is created.
Subrecipient Repository	• Exists for each subagreement associated with a project segment and is available after the subagreement has been created.
Amendments Repository (Visit the <u>Subagreement and</u> <u>Subamendment Document</u> <u>Repositories Job Aid</u> for more information on this repository)	 Panel from amendment page links to this document repository and is available after the amendment has been created
Clipboard	 Exists for each user. Only visible to the individual user. 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

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Person Repository	Exists for each person record in GMAS.Visible to all users.
Outside Foreign Contracts and Agreements (person level repository) (Visit the <u>Outside Foreign</u> <u>Contracts and Agreements job</u> aids for more information on this 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 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)	• Exists for each organization record in GMAS.
Letter of Credit (LOC) Repository	Exists within the LOC component of GMAS.Only available to the LOC Specialist role.

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Adding Folders and Files to the Document Repositories

Creating a Folder

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".

Documents Initial proposal # 5021225				✤ Related links	Actions
Name \Diamond Final documents to be submitted to sponsor (1)	Size \$	Uploaded by \Diamond	Uploaded date \diamond	Add folde	
FW: Invoice Number 12453614	10 KB	Tristan Burke	Oct 28, 2021 1:35 PM	Get from	clipboard
image002.gif	14.4 KB	Tristan Burke	Oct 28, 2021 1:35 PM		٥

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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".

Size o	Uploaded by 0	Uploaded date 0	
			0
31.5 KB	Jessica Pereault	Sep 2, 2016 7.58 AM	Upload documents
104.88	Jessica Pereault	Sep 1, 2016 3.58 PM	Rename
77 KB	Jessica Perreault	Sep 1, 2016 3.58 PM	Delete
710.4 820	Jessica Persualt	Sep 1, 2016 3.56 PM	Get from clipboard
	31.5 KB 104 KB 77 KB	31.5.82 Jessica Perreault 104.82 Jessica Perreault	31.5.42 Jessica Peresult Sep 2, 2016 7.58 AM 104.63 Jessica Peresult Sep 1, 2016 3.58 PM 77.83 Jessica Peresult Sep 1, 2016 3.58 PM

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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".

Documents Initial proposal # 5021225				Related links
Name 🗘	Size ≎	Uploaded by \diamond	Uploaded date 🗘	Add folder
Final documents to be submitted to sponsor (1)				Upload documents
FW: Invoice Number 12453614	10 KB	Tristan Burke	Oct 28, 2021 1:35 PM	Get from clipboard
image002.gif	14.4 KB	Tristan Burke	Oct 28, 2021 1:35 PM	0

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

Documents Initial request # 5021225				Actions
Name	Size	Uploaded by	Uploaded date	
Final documents to be submitted to sponsor (1)			_	> [
FW: NIDDK DIVERSITY SUPPLEMENT APPLICATION PDF	13.4 KB			Upload documents
Supplement docs.pdf	4.7 MB	Jessica Perreault	Nov 5, 2015	Rename
Department sign-off*.pdf	101.2 KB J	Jessica Perreault	Oct 26, 2012	
This is amendment 1 fully executed on 09-21-12.				Delete
Project-Summary.pdf	81.4 KB	Jessica Perreault	Oct 2, 2014	Get from clipboard
		0.0000112		1

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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 can be added to each of the documents prior to finalizing the upload by choosing "Add description" and entering text.

Name	3 files selected for upload Choose		×	
Final documents				4
FW: NIDDK DIV	2 12-19-13 Final NarrativeSubmission.docx	Vploaded	Add description	
	Budget REVISED022114.xlsx	Vploaded	Add description	
	2013 fullreport Harvard financial.pdf	Vploaded	Add description	
Project-Summa		_		0
	Cancel	Done		0

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Emailing Documents and Moving from the Clipboard

Emails can be stored in a GMAS document repository by emailing <u>gmasdoc@camail.harvard.edu</u> 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, and then "Documents"

Harvard GMAS	Projects People Organizations	🛓 Jessica Perreault 👻
System: Systems and	logy Dispinanting Research Castles	Account settings
PI	Sponsor Regents of the University of California - Be Award number IAADD 11210 Prime sponsor © National Science Foundation Prime award number IIIC 0540071	togout
01 (print) - Sprinter Anny A	gra.	🗑 To-Do's
Segment 1	쉽 Documents 🧿 Activity 🖕 Comments (0) 💊 Refe	2] Documents
Action memos 45	Dates and dollars K	Portfolio

Documents can be moved from the Clipboard by navigating to the document repository where the document will live. To upload the email (or its attachments) to the document repository, select "Actions" and then "Get from clipboard".

Documents Initial proposal # 5021225				ℜ Related links Actions
Name 🗘	Size ≎	Uploaded by \diamond	Uploaded date 🗘	Add folder
Final documents to be submitted to sponsor (1)				Upload documents
FW: Invoice Number 12453614	10 KB	Tristan Burke	Oct 28, 2021 1:35 PM	Get from clipboard
image002.gif	14.4 KB	Tristan Burke	Oct 28, 2021 1:35 PM	٥

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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".

Documents Initial request # 5021225				Actions
Name	Size	Uploaded by	Uploaded date	
Final documents to be submitted to sponsor (1)				── →⊡
FW: NIDDK DIVERSITY SUPPLEMENT APPLICATION PDF	13.4 KB			Upload documents
Supplement docs.pdf	4.7 MB	Jessica Perreault	Nov 5, 2015	Rename
Department sign-off*.pdf This is amendment 1 fully executed on 09-21-12.	101.2 KB	Jessica Perreault	Oct 26, 2012	Delete
Project-Summary.pdf	81.4 KB	Jessica Perreault	Oct 2, 2014	Get from clipboard
N	2.112	1.4.1		

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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.)

Name	Category		Size	Uploaded by	Upl	oaded date
Training PDF.pdf			83.1 KB	Stephanie Reese	Feb	14, 2023 8:54 AM
Prior Day Receivables.xlsx		6	12.5 KB	Stephanie Reese	Feb	Move
SMR.docx			376.1 KB	Stephanie Reese	Feb	Delete
INVOICE.pdf			153.4 KB	Stephanie Reese	Feb	Lock
						Rename
						Edit description
						Add category

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

 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.

Initial proposal - version 2 # 6373627				Download all
Name 0	Size 🗘	Uploaded by 0	Uploaded date ©	
	3126 0	opioaded by v	opioaded date v	Add folder
# SUBMITTED PROPOSAL (3)				Upload documents
BIO Department approval - Williams (1)				Get from clipboard
Late notification (1)				Lock documents
Sub docs - see ASSIST preview for budgets (6)				Unlock documents
Messerlian_PFAS_2020.03.04_FINAL.pdf	4.4 MB	Melissa Lund	Mar 4, 2020 10:08 AM	Move documents
PHS assignment form_Messerlian_PFAS.pdf	105.4 KB	Melissa Lund	Mar 3, 2020 3:08 PM	Delete documents
Messerlian_MarchR01resub_2020.02.26.xlsm	114.4 KB	Melissa Lund	Feb 28, 2020 4:43 PM	
COVER LETTER_PFAS_R01_Submitted_2020.pdf	118.2 KB	Melissa Lund	Feb 27, 2020 12:21 PM	

- 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.

 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.

	Move selected documents to: # SUBMITTED PROPOSAL	•			
	Name 0	Folder/Subfolder name 0	Size 0	Uploaded by 0	Uploaded date 0
	RE: Submitted Proposal from eRA commons Messerilan FW: GRANT13037583 Grants gov Submission Receipt	# SUBMITTED PROPOSAL	12.6 KB	Maureen Sciortino	Mar 5, 2020 8:46 AM
	Submitted Proposal from eRA commons Messerilan FW: GRANT13037983 Grants gor Submission Receipt Submitted Proposal from eRA Commons Messerian 4413087_Egrant.pdf	# SUBMITTED PROPOSAL	9.3 KB	Maureen Sciortina	Mar 5, 2020 8-26 AM
~	PHS assignment form, Messerlian, PFAS.pdf		105.4 KB	Melissa Lund	Mar 3, 2020 3:08 PM
~	Messerlian_MarchR01resub_2020.02.26.xlsm		114.4 KB	Melissa Lund	Feb 28, 2020 4:43 PM
	Dr. Petrozza Signed SOI - 2020A001086.pdf	Sub docs - see ASSIST preview for budgets/MGH - Petrozza	1.2 MB	Melissa Lund	Feb 27, 2020 3:14 PM
	2018-09-28 MGH DHHS Rate Agent-IDC pdf	Sub docs - see ASSIST preview for budgets/MGH - Petrozza	1.2 MB	Melissa Lund	Feb 27, 2020 3:14 PM
		2 documents will be mo	ved.		

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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.

Documents Initial proposal - version 2 # 6410334				% Related links Actions
	Download all			
Name	Add folder			
Internal Budget (6)				Upload documents
Revised Budget w Audit cost (3)				Get from clipboard
Subawardee - Swiss TPH (3)				Lock documents
To Submit to Sponsor (7)				Unlock documents
TESTING 1_59 Melton.DivSupp.U01DK089536 (8).pdf	3.1 KB 4.7 MB	Jessica Perreault Jessica Perreault	Jan 13, 2022 7:25 PM Jan 13, 2022 7:25 PM	Move documents
FW: GMAS TEST 4/16/2012 - test with tons of attachments	7.3 KB	Jessica Perreault	Nov 5, 2015 12:25 PM	Delete documents

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.

Delete do	Delete documents Segment 01								
A Docume	ents cannot be retrieved once they are deleted. Be sur	re all documents are p	properly selected before deleting	j .					
	Name th	Category \$	Folder/Subfolder name ‡	Size ‡	Uploaded by ‡	Uploaded date ‡			
V	Training PDF.pdf			83.1 KB	Stephanie Reese	Feb 14, 2023 8:54 AM			
	Prior Day Receivables.xlsx			12.5 KB	Stephanie Reese	Feb 14, 2023 8:53 AM			
1	SMR.docx			376.1 KB	Stephanie Reese	Feb 14, 2023 8:53 AM			
	NVOICE.pdf			153.4 КВ	Stephanie Reese	Feb 14, 2023 8:52 AM			
	2 documents will be deleted.								
		Cancel	Delete documents						

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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".

Documents Initial request # 5021225				C Actions
Emergency Release	4.3 KB			0
Failed-Validation-to-Ready-to-D.xlsx	37 KB	Jessica Perreault	Jan 13, 2015	0
FW: NIDDK DIVERSITY SUPPLEMENT APPLICATION PDF	13.4 KB			0
Bupplement docs.pdf	4.7 MB	Jessica Perreault	Nov 5, 2015	0
12-19-13 Final NarrativeSubmission.docx	41.8 KB	Jessica Perreault	Jul 22, 2016	•
12-19-13 Final NarrativeSubmission.docx	41.8 KB	Jessica Perreault	Jul 22, 2016	Move
2013 fullreport Harvard financial.pdf	3.7 MB	Jessica Perreault	Jul 22, 2016	Delete
2013 fullreport Harvard financial.pdf	3.7 MB	Jessica Perreault	Jul 22, 2016	Lock
🕅 Amgenixisx	10.2 KB	Jessica Perreault	Oct 2, 2014	Rename
Approvals_Matrix_Module_Doc.xlsx	24.6 KB	Jessica Perreault	Oct 2, 2014	Edit Description
Biohazards.docx	16.7 KB	Jessica Perreault	Jul 22, 2016	0

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Editing Descriptions 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".

🖂 Emergency Release	4.3 KB				0
Entergency necesse Failed-Validation-to-Ready-to-D.xlsx	37 KB	Jessica Perreault	Jan 13, 2015		0
FW: NIDDK DIVERSITY SUPPLEMENT APPLICATION PDF	13.4 KB				•
Supplement docs.pdf	4.7 MB	Jessica Perreault	Nov 5, 2015		•
12-19-13 Final NarrativeSubmission.docx	41.8 KB	Jessica Perreault	Jul 22, 2016		•
2013 fullreport Harvard financial.pdf	3.7 MB	Jessica Perreault	Jul 22, 2016	Move	
2013 fullreport Harvard financial.pdf	3.7 MB	Jessica Perreault	Jul 22, 2016	Delete	
Amgen_xlsx	10.2 KB	Jessica Perreault	Oct 2, 2014	Lock	
Approvals_Matrix_Module_Doc.xlsx	24.6 KB	Jessica Perreault	Det 2, 2014	Rename	
Biohazards.docx	16.7 KB	Jessica Perreault	Jul 22, 2016	Edit Description	
Budget REVISED022114.xlsx	46 KB	Jessica Perreault	Jul 22, 2016		<
CA Division DEVICE TRADUCT A VISIO	A6.KR	hausten Darraault	A100 2014		

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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.

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Locking and unlocking documents and emails individually:

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

Biohazards.xls	5.9 MB Jessica Perreault Jul 22, 2016	0
Budget REVISED022114.xlsx	46 KB Jessica Perreault Jul 22, 2016	Move
Budget REVISED022114.xlsx	46 KB Jessica Perreault Jul 22, 2016	Delete
Components.xlsx	11.3 KB Jessica Perreault Jul 22, 2016	Lock
Department sign-off*.pdf This is amendment 1 fully executed on 09-21-12.	101.2 KB Jessica Perreault Oct 26, 2012	Rename
Project-Summary.pdf	81.4 KB Jessica Perreault Oct 2, 2014	Edit Description
Subjects chart.png	9 KB Jessica Perreault Apr 27, 2015	e 0
		Unlock

Locking and unlocking documents and emails in bulk

 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.

Documents Initial proposal # 5021225	% Related links			
				Download all
Name 🗘	Size 🗘	Uploaded by \diamond	Uploaded date 🗘	Add folder
Budget entry_SCR_0006_HU direct total.png	13.5 KB	Jess Perreault	Jan 13, 2022 7:31 PM	Upload documents
A file	3.1 KB	Jess Perreault	Jan 20, 2021 7:18 PM	Get from clipboard
Create_Proposals_and_Requests_Quick_Reference_Job_Aid.pdf	307.4 KB	Jess Perreault	Jan 20, 2021 7:18 PM	Lock documents
Create_Proposals_and_Requests_Quick_Reference_Job_Aid.pdf	307.4 KB	Jess Perreault	Jan 20, 2021 7:15 PM	
August 2020 1_54.03 Testing	3.1 KB	Jess Perreault	Aug 11, 2020 7:23 PM	Unlock documents
Segment_Accounts_List_8070788 (1).xls	288.5 KB	Jess Perreault	Aug 11, 2020 7:23 PM	Move documents
Segment_Accounts_List_8070788.xls	288.5 KB	Jess Perreault	Aug 11, 2020 7:20 PM	Delete documents
MGH SOW Intent rh_cm.docx	12.2 KB	Melissa Lund	Feb 27, 2020 3:14 PM	C
request_5021225.pdf	1.5 MB	Sivan Ehrlich	Nov 20, 2006 11:28 AM	£4

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.

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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.

	Name ©	Folder/Subfolder name 0	Size 0	Uploaded by 0	Uploaded date ©
	Budget entry_SCR_0006_HU direct total.png		13.5 KB	Jess Perreault	Jan 13, 2022 7:31 PM
7	A file Create_Proposals_and_Requests_Quick_Reference_Job_Ald.pdf		3.1 KB	Jess Perreault	Jan 20, 2021 7:18 PM
~	August 2020 1_54.03 Testing Segment_Accounts_List_8070788 (1).xis		3.1 KB	Jess Perreault	Aug 11, 2020 7:23 PN
	MGH SOW Intent rh_cm.docx		12.2 KB	Melissa Lund	Feb 27, 2020 3:14 PM
		4 documents, including email attac	hments, will be locke	d.	

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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.

Documents Initial proposal # 5021225				� Related links	Actions
Name ≎	Size ≎	Uploaded by \diamond	Uploaded date 🗘		
Final documents to be submitted to sponsor (1)					٥
111099_111181 DWH.pdf	117.1 MB	Tristan Burke	Oct 28, 2021 1:50 PM		٥
FW: Invoice Number 12453614	10 KB	Tristan Burke	Oct 28, 2021 1:35 PM		0

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.

Documents Initial proposal # 5021225				Related links Actions Download all
Name ≎	Size ≎	Uploaded by \Rightarrow	Uploaded date 🗘	Add folder
Final documents to be submitted to sponsor (1)				Upload documents
FW: Invoice Number 12453614	10 KB	Tristan Burke	Oct 28, 2021 1:35 PM	Get from clipboard
image002.gif	14.4 KB	Tristan Burke	Oct 28, 2021 1:35 PM	0

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Categorizing Documents

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

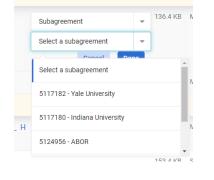
Previously uploaded documents can be categorized by choosing the gear icon and selecting "Add Category".

IRB (2)					٥
Harvard IRB approval.pdf	136.4 KB	Mark Cellucci	Aug :	26, 2020 9:49 AM	۰
户 IRB.pdf 也	133.9 KB	Mark Cellucci	Aug	Move	
MPI Effort (1)				Delete	
RE_ MPI effort - 7R01MH 112384-05 - PI Name_ H	RE_ MPI effort - 7R01MH 112384-05 - PI Name_ H 348 KB	Meghan Coughlin	Oct	Lock	
NVOICE_282523_02.pdf	153.4 KB	Stephanie Reese	Feb	Rename	
P export (2).csv	1 KB	Stephanie Reese	Jan	Edit description	
561				Add category	

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

IRB (2)		
🕒 Harvard IRB approval.pdf	₽ -	18
	Canael Dona	^
IRB.pdf		
MPI Effort (1)	Subagreement	I.
RE_ MPI effort - 7R01MH 112384-05 - PI Name_ H	Subagreement Budget	
	Subagreement Statement of Intent	

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.



HarvardGMAS

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

		1 files selecte	ed for upload		
Choose files	Drop files here				
Budget.docx	G		✓ Uploaded	Add description or category	*
		Cancel	Done		Ŧ

Available categories and sub recipients are displayed to choose from.

Budget.docx		✓ Uploaded	Add description or category
Enter description		6	
Subagreement Budget	-	Select a subagreement	
		5117180 - Indiana University	•
		5124956 - ABOR	
		5117178 - Fenway Community Health Center	Mark Cellucci Aug
		5117272 - Columbia University	v

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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.

ment subrecipient documents	1 document			Download all	1
Filename	Category	Size	Uploaded by	Date	
Segment repository					
NVOICE_282523_02.pdf	Subagreement	153.4 KB	Stephanie Reese	Feb 6, 2023 11:23 AM	

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

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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 <u>document security matrix</u>.

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Browser Preferences for Document Download

Firefox

<u>https://support.mozilla.org/en-US/kb/change-firefox-behavior-when-open-file</u> (scroll down to section called "Change download actions" or click this URL<u>https://support.mozilla.org/en-US/kb/change-firefox-behavior-when-open-file#w_changing-download-actions</u>)

Instructions to view PDF files in Firefox browser (plug-ins and how to fix common issues): https://support.mozilla.org/en-US/kb/view-pdf-files-firefox-without-downloading-them

Chrome

https://support.google.com/chrome/answer/95759?co=GENIE.Platform%3DDesktop&hl=en (scroll down to section called "Change download locations")

Instruction to view PDF files in Chrome browser (enable plug-in): https://support.google.com/chrome/answer/6213030?hl=en

Internet explorer

https://support.microsoft.com/en-us/help/17436/windows-internet-explorer-download-files-from-web (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): https://helpx.adobe.com/acrobat/kb/cant-view-pdf-web.html#topic-6

Other resources

Solutions to common issues viewing PDFs from a website from Adobe: <u>https://helpx.adobe.com/acrobat/kb/cant-view-pdf-web.html</u>

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