

GMAS Sub dashboard

This job aid focuses on the how to use the GMAS Sub Dashboard. This dashboard provides visibility into the status and assignments of pending subagreements and subamendments.

Prerequisites

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

Additional Resources

- [Subagreement and Subamendment Job Aid](#)
- [Step-by-step Walkthrough of GMAS Subagreement Workflow](#)
- [University wide GMAS Subagreement Business Process](#)
- [All Subagreement related Job Aids](#)

Accessing the Sub Dashboard

Select **Sub dashboard** from the GMAS homepage.

The screenshot shows the Harvard GMAS homepage. At the top, there is a dark red navigation bar with the text 'Harvard GMAS' on the left, a search bar, and several menu items: 'Advanced', 'People', 'Organizations', 'Links', and 'Cynthia Martini'. Below the navigation bar, the user is greeted with 'Welcome, Cynthia' and an 'Info' icon. A blue button labeled 'Create an initial proposal' is visible. On the left side, there is a 'News' section with a heading 'The Research Administration Portal was recently updated!' and several paragraphs of text. On the right side, there is a vertical list of dashboard options: 'Requests dashboard', 'Sub dashboard' (highlighted with a yellow box), 'Pending notices', 'Financial deliverable dashboard', and 'Transaction monitoring dashboard'.

The dashboard is initially displayed with the top tier filter set to **My Portfolio**. If you don't have a portfolio assignment, no records will be displayed.

For more information on what is in your portfolio and instructions on how to clean it up, please go to [How to update a portfolio in GMAS](#).

Top tier filters include the following:

1. **My work:** This filter is only available for Central Administrators. It includes any subagreements assigned to the Central Administrator, regardless of portfolio assignment
2. **My portfolio:** Includes all subagreements in the user's portfolio, regardless of whether it is assigned to that user or not.
3. **SPH/HMS/University Area:** Includes subagreements on projects where the responsible tub is in an associated area.
4. **All:** Includes all subagreements based on the user's GMAS security.

Note the hyperlinks that provide instant access to additional information:

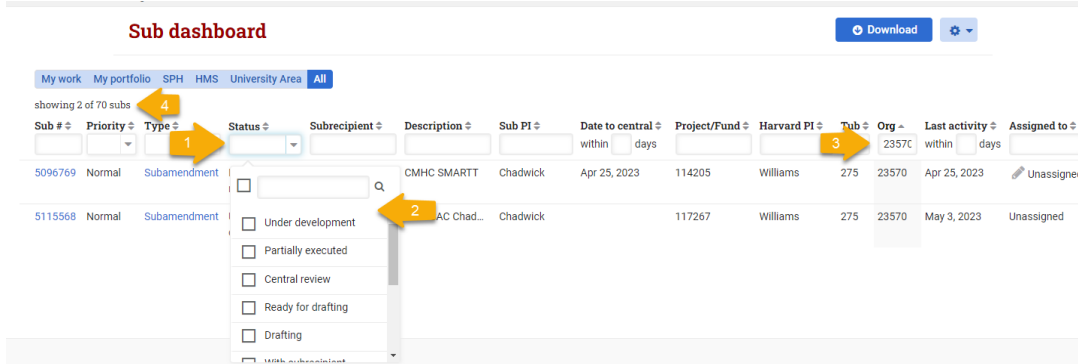
- **Sub #:** Links to Subrecipient homepage
- **Type:** Links to Subagreement/Subamendment homepage
- **Subrecipient:** Links to the GMAS Organizational profile for the subrecipient

Sub #	Priority	Type	Status	Subrecipient	Description	Sub PI	Date to central	Project/Fund	Harvard PI	Tub	Org	Last activity	Assigned to
5124455	Normal	Subagreement	Under develop...	Mbarara Universi...		Nginzi	within days	280933	Meara	520	45338		Unassign...
5101570		Subamendment	Under develop...	Sangath	Scale-up	Tugnawat		149869	Patel	520	45338		Unassign...

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Other Sorting and Filtering

1. Sort any column by clicking on the small up/down arrow icon
2. Filter by clicking on the dropdown such as in the Status, Priority, or Type column OR
3. Filter by entering a value, such as in the Org column
4. Shows the count of how many subs fit the filtered criteria

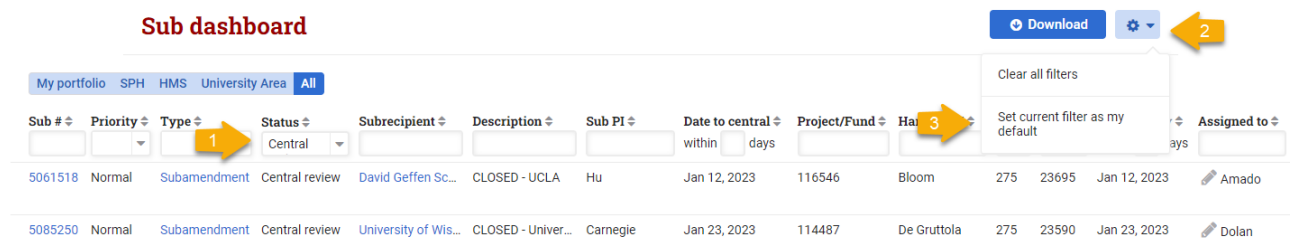


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Default Filters

Filters may be saved as *default* filters so that when the user logs in again, the same filters will be applied.

1. Select filters and sorting you want to apply for your default filter
2. Click on **Gear box**
3. Select **Set current filter as my default**: This action will always be available in the drop down. Setting the current filter as my default will save the filter and sorts that are currently applied to the dashboard as the default for each time you access the dashboard in a new GMAS session.



After selecting **Set current filter as my default**, the **Edit default filter for subagreement dashboard** modal is displayed. Currently selected filters and sorts are displayed. Select **Save to my default filter**.

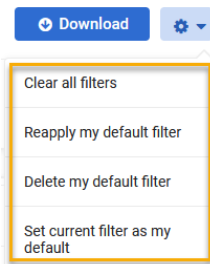
Edit default filter for subagreement dashboard ✕

Setting a default on the subagreement dashboard will ensure that the below filters and sorts apply each time you navigate to the dashboard at the beginning of a GMAS session.

Default top tier filter	My portfolio	
Default filters	Status	Central review
	Org	31240
Default sort	Sort by	subrecipient
	Sort order	ASCENDING

Note that there are four actions that can appear in the actions drop down menu:

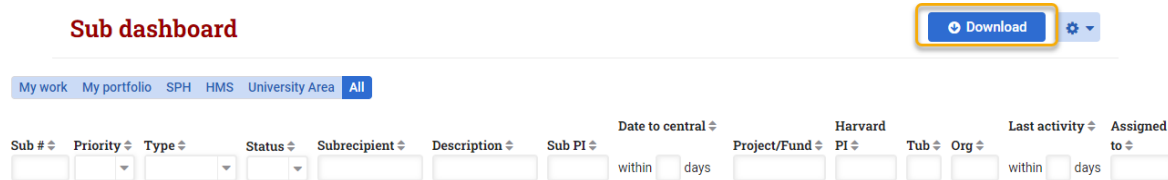
- **Clear all filters:** This action appears in the drop down anytime there is a filter or sort currently applied to the dashboard. Selecting **Clear all filters** resets all sorts and filters currently applied to the dashboard. It does not delete your default filter.
- **Reapply my default filter:** This action appears in the drop down if a default filter is set, but the current sorts and filters do not match the saved default filters. Selecting **Reapply my default filter** resets all of the filters and sorts to the saved default filter for the current session.
- **Delete my default filter:** This action only appears in the drop down if there is a current default filter set. Deleting the default filter removes all saved sorts and filters in your current session.
- **Set current filter as my default:** This action will always be available in the drop down. Setting the current filter as my default will save the filter and sorts that are currently applied to the dashboard as the default for each time you access the dashboard for the first time in the GMAS session.



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Downloading information in the Dashboard

Click on **Download** to download all data on the dashboard to an Excel file. Filters are not applied in download. Use Excel filters when needed in the downloaded Excel file



Assigned to

The **Assigned to** column identifies who the subagreement is currently assigned to. Because a subagreement will be assigned to different people across the life of the workflow, the name displayed is based on the current status

1. Any subagreement that is in **Under Development** status, the Assigned to will show as Unassigned
2. Any subagreement that is in **With subrecipient** status, the Assigned to will show as Subrecipient
3. Any subagreement that is in any other status will show current assignee, based on the status. E.g., if a subagreement is in **Drafting** Status, the name of the assigned drafter will be displayed; if in **Central Review** status, the name of the reviewer will be displayed, etc.
 - a. If a person has not yet been assigned for that status, the **Assigned to** will show as Unassigned
4. Central Administrators can change the assignment by clicking the pencil icon for all statuses except for Under development, With subrecipient, Clarifications requested, Indefinite hold, and In Review

The screenshot shows the 'Sub dashboard' with a table of subagreements. The table has columns for Sub #, Priority, Type, Status, Subrecipient, Description, Sub PI, Date to central, Project/Fund, Harvard PI, Tub, Org, Last activity, and Assigned to. There are eight rows of data. Annotations with yellow arrows and numbers 1-4 point to specific cells in the 'Assigned to' column: 1 points to 'Unassigned' for sub # 5126345, 2 points to 'Subrecipient' for sub # 5126679, 3 points to 'Ramos' for sub # 5126712, and 4 points to 'Ramos' for sub # 5126716. The 'Date to central' column has a 'within' field and 'days' unit.

Sub #	Priority	Type	Status	Subrecipient	Description	Sub PI	Date to central	Project/Fund	Harvard PI	Tub	Org	Last activity	Assigned to
5126345	Normal	Subagreement	Under development	American Egg B...		Record01	Jun 1, 2020	270685	Record01	370	31240	Dec 13, 2022	Unassigned
5126687	Normal	Subagreement	Clarifications requested	Regents of the U...	Cal Berkely - Jon...	Jones Prathe	Jun 1, 2022	134706	Harvard	370	31240	Dec 31, 2022	Martini
5126685	Normal	Subamendment	Central review	Tufts University	Tufts - Jones	Jones	Jun 1, 2022	134706	Harvard	370	31240	Jan 8, 2023	Ramos
5126677	Normal	Subagreement	Drafting	Boston Universit...		Record01	Jul 1, 2022	134707	Harvard	370	31240	Jan 12, 2023	Kaze
5126679	Normal	Subagreement	With subrecipient	Boston Universit...		Record01	Jun 1, 2022	134708	Harvard	370	31240	Dec 31, 2022	Subrecipient
5126712	Normal	Subagreement	Central review	Boston Universit...		Record01	Jun 1, 2022	134718	Harvard	370	31240	Jan 8, 2023	Ramos
5126714	Normal	Subagreement	Central review	Boston Universit...		Record01	Jun 1, 2022	134719	Harvard	370	31240	Jan 8, 2023	Ramos
5126716	Normal	Subagreement	Central review	Boston Universit...		Record01	Jun 1, 2022	134720	Harvard	370	31240	Jan 8, 2023	Ramos

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