

# Overview of the Initial Proposal and Competing Renewal Homepage

This job aid supports the re-designed proposal homepage. Users across the system will encounter the new proposal homepage for Initials and Competing Renewals, and this job aid serves as a tool for understanding the new layout. The proposal homepage still allows users to retrieve and edit proposal data, and navigate between proposal versions. The re-design brings outstanding tasks and key information front and center.

There are six main sections of data on the re-designed proposal home: Proposal type/version switcher, left navigation, action buttons, key information, status/workflow indicator, and panels. The data has been organized in this way to allow for easier navigation, provide less clicks to receive information, and to highlight outstanding activities/next steps.

## Understanding the New Proposal Home

The screenshot shows the Harvard GMAS proposal homepage for a specific proposal. The page is titled "GPHD Project : GMAS Proposal Homepage Documentation" and includes details such as PI Dale Cooper, Sponsor Town of Twin Peaks, and a proposed amount of \$777,000. The proposal is in a "Pending" status for "Segment 1 of 1" with a duration from Aug 1, 2019, to Jul 31, 2022. The breadcrumb trail indicates the user is viewing the "Initial proposal" version 2.

Numbered callouts highlight the following sections:

- 1 Initial proposal 6141077**: The main title and proposal ID.
- 2 Research team 2**: A sidebar menu showing counts for Research team (2), Subagreements (0), and Accounts (3).
- 3 Lock and route for signatures**: A button to manage the proposal's signature requirements.
- 4 Key information**: A section indicating "Harvard is a subrecipient" and "12 do not apply".
- 5 Under development**: A workflow indicator showing the current status as "Under development" (highlighted in red), with other stages being "Under review", "Authorized", and "Submitted". It also displays "Due to central in 37 days on Jun 16, 2017" and "Due to sponsor in 47 days on Jun 26, 2017".
- 6 Proposal information**: A detailed table of proposal data.

Section	Value	Action
Proposal information	Fellowship	Edit
Proposed dates and dollars	Aug 1, 2019 - Jul 31, 2022   \$777,000	Edit
Approvals	3 total   3 needed   0 attributes apply	
School specific information	2 questions answered 'No'   Show all	Edit
Interfaculty involvement	None	Edit
Documents	0 documents	Upload

## 1 – Proposal type/Version Chooser



This allows users to easily navigate to all versions of a proposal by clicking the drop down arrow next to the proposal.

- The version chooser includes the proposal type (Initial or Competing Renewal), version number, and request id.
- A drop down will not show if there is only one proposal version (revise to resubmit has never been initiated from the proposal)

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## 2- Left Navigation

Research team	2
Subagreements	0
Accounts	3

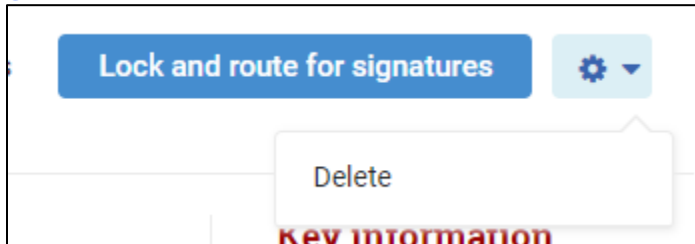
The left navigation links to list screens where information can be added, edited, or deleted.

Research team: Link goes to the research team list for the proposal. The count represents the number of research team members that were included in the proposal.

Subagreements: Link goes to the subagreement list for the proposal. The count represents the number of subagreements that were included in the proposal.

Accounts: Link goes to the account shell page for the proposal. The count represents the number of account shells that were created with the proposal.

### 3- Action Buttons



The primary action buttons suggest the next step in the proposal workflow and the secondary action buttons list all other actions available. When buttons are disabled, hover text is provided describing why the action cannot be taken at that time (i.e., missing information needed to move forward or user security).

The following actions are available for each status of the proposal:

#### Under Development

- Primary Action – Lock and route for signature
- Secondary Action – Delete

#### Under Review/Authorized

- Primary Action – Submit to sponsor
- Secondary Action – Retract this proposal

#### Submitted to Sponsor

- Primary Action – Log a notice
- Secondary Action – Revise to resubmit, Proposal Closeout, or Proposal rollback

#### Awarded

- Primary Action – Log a notice
- Secondary Action – Make project revision

#### Closed

- Primary Action – Revise to resubmit or Log notice (if a prior version)
- Secondary Action – Proposal rollback or no secondary action (if a prior version)

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## 4- Key Information

**Key information**

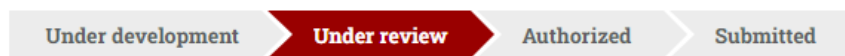
- ✘ Additional staff/space
- ✘ Administrative salaries
- ✘ Animals
- ✘ Biohazards/rDNA
- ✘ Cost sharing
- ✘ Harvard is a subrecipient
- ✘ Human subjects
- ✘ International
- ✘ Participant support costs
- ✘ Program income
- ✘ Stem cells
- ✘ Submitted without institutional review/approval
- ✘ Use of school name
- OTD
- COVID-19

15 do not apply: [Hide](#)

This section surfaces important project attributes to the proposal home, so that users can quickly understand the project's risks/ complexities.

- The key information section lists approval attribute responses, if Harvard is a sub recipient, and if the proposal has been submitted without institutional review/approval.
- The proposal home will show the items that apply to the segment with a green check mark.
- Users can use the expansion tag at the bottom of the section indicating the number of items that do not apply (i.e., 13 do not apply) to see responses to all questions. Questions answered with a “no” are displayed with an **X**. Any item with an ellipsis (...) is something that has not been answered yet in the proposal.

## 5- Status/Workflow Indicator



### **Due to sponsor in 71 days on Jul 15, 2023**

Locked and routed 91 days ago on Feb 3, 2023 10:26 AM by Adam Ackerman

Due to central in 66 days on Jul 10, 2023

This section provides information relevant to the current state of the proposal, and will indicate actions that need to be completed before the proposal can be locked and routed or submitted to sponsor.

The following information will display for each status of the proposal:

### Under Development

- Date due to central (will only display if a due date has been entered)
  - Calculated by the schools policy and the sponsor due date
- Date due to sponsor (will only display is a due date has been entered)
- Actions required – identifies missing information that needs to be completed before the proposal can move forward (edit buttons are disabled with hover text when a user doesn't have security)
  - Sponsor due date is missing
  - Key personnel flag is missing for <name of person missing the flag>
  - Investigator flag is missing for <name of person missing the flag>
  - Proposal budget is missing
  - Approval questions have not been answered
  - School questions have not been answered
  - Prime PI is missing
  - Subagreement dates need attention
  - Subrecipient(s) missing

### Under Review/Authorized

- Due to sponsor date
- Date and time the proposal was locked and routed, and the person that locked and routed it
- Due to Central date

- Actions required – identifies missing information that needs to be completed before the proposal can move forward (edit buttons are disabled with hover text when a user doesn't have security)
  - This list will only appear for proposals where information was changed after lock and route, or for proposals that were submitted prior to the May 22<sup>nd</sup> release that are rolled back:
    - Sponsor due date is missing (will only appear if someone in a Central Admin role removes the sponsor due date)
    - Investigator flag is missing for <name of person missing the flag>
    - Approval questions have not been answered
    - School questions have not been answered
    - Subrecipient(s) missing

#### Submitted to Sponsor

- Date the proposal was submitted to the sponsor, and person that submitted it
- Submission information
  - Date received by central
  - Submission method
  - Tracking number

#### Awarded

- Date the award was set up in GMAS
- Action memos related to the proposal

#### Closed

- The reason for proposal closeout and the person that closed it

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## 6- Panels

The screenshot displays a series of panels for a proposal, each with an 'Edit' button and a collapse icon. The panels are:

- Signatures:** Shows 2 total signatures, 2 needed, and 0 done. It lists two roles: Principal Investigator Francine Laden and Sponsored Programs Approver Wendy Chan, both with a 'Signature needed' warning and a 'Log' button.
- Proposal information:** Shows 'Basic research and all other'.
- Proposed dates and dollars:** Shows dates 'Jul 1, 2017 - Jun 30, 2022' and a dollar amount '\$791,008'.
- Approvals:** Shows 14 total approvals, 6 needed, and 3 attributes apply.
- Proposed cost share:** Shows 'Mandatory' and '\$52,000'.
- Program income:** Shows '\$30,000.00'.
- Grants.gov information:** Shows 'PA-DD-000' and 'S2S via GMAS'.
- School specific information:** Contains a question: 'May Provostial review be postponed until an award is made? (Provostial review is not required until an award is made if this is the sole review criterion: the project is international and involves human subjects research requiring IRB expedited or full review.)' with a 'Yes' button. Below it, it says '3 questions answered "No" | Show all'.
- Interfaculty involvement:** Shows 'None'.
- Documents:** Shows '2 documents' with 'Upload' and 'Download all' buttons.

The panels display all of the data associated to the proposal.

**Signatures:** Shows for all statuses after Under Development. The summary view in the panel shows all signatures listed as required to sign. The summary view defaults to open when the proposal is in Under Review and Authorized statuses.

**Proposal information:** Panel always shows. The summary view in the panel shows basic information about the proposal (such as PI name, org, etc.)

**Proposed dates and dollars:** Shows for all statuses unless the budget information is missing and appears in the "Actions required" section. The summary view in the panel shows each proposed period and the breakdown of Direct and Indirect dollars.

**Approvals:** Shows once the approval attribute questions have been answered. The summary view in the panel shows the needed approvals and their current statuses, and the approval attribute responses.

**Proposed cost sharing:** Only shows if the cost sharing question in the approval attributes was answered "Yes". The summary view in the panel shows the cost share form details and indicates whether the cost share is Mandatory or Voluntary.

Program income: Only shows if the program income question in approval attributes was answered “Yes”. The summary view in the panel shows the breakdown of program income by period.

School specific information: Shows for all statuses unless the answers are missing and it appears in the “Actions required” section. The summary view in the panel shows the questions that were answered “Yes” with an option to see the full list of questions.

Interfaculty involvement: Always shows. The summary view in the panel shows the details of the interfaculty department, PI, and involvement period.

Documents: Always shows. The summary view in the panel shows all of the documents that have been uploaded into the proposal document repository. Documents can be downloaded from here.

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