Requests dashboard

User Role(s): Department Administrators
Central Administrators
Observers
Last Updated: 3/16/2022

Request dashboard

The Requests dashboard provides visibility into all requests that are in process, submitted to sponsor, or in the process of being awarded. The dashboard is broken out into tabs by request status. This job aid will review the different filters, tabs, and what information is available on this dashboard.

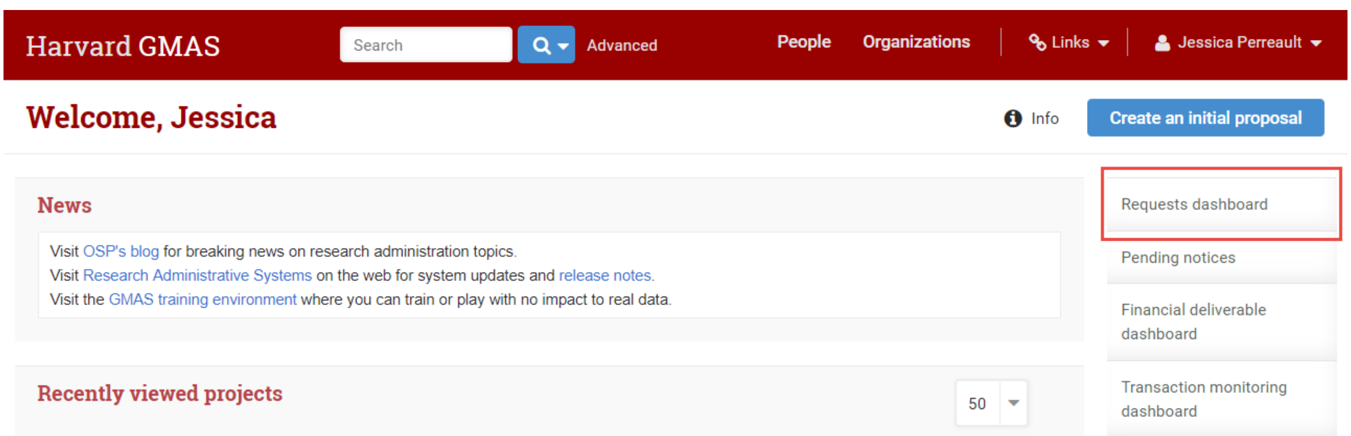
Prerequisites

This job aid assumes that the reader has an understanding of the basic functionality and terminology of GMAS.

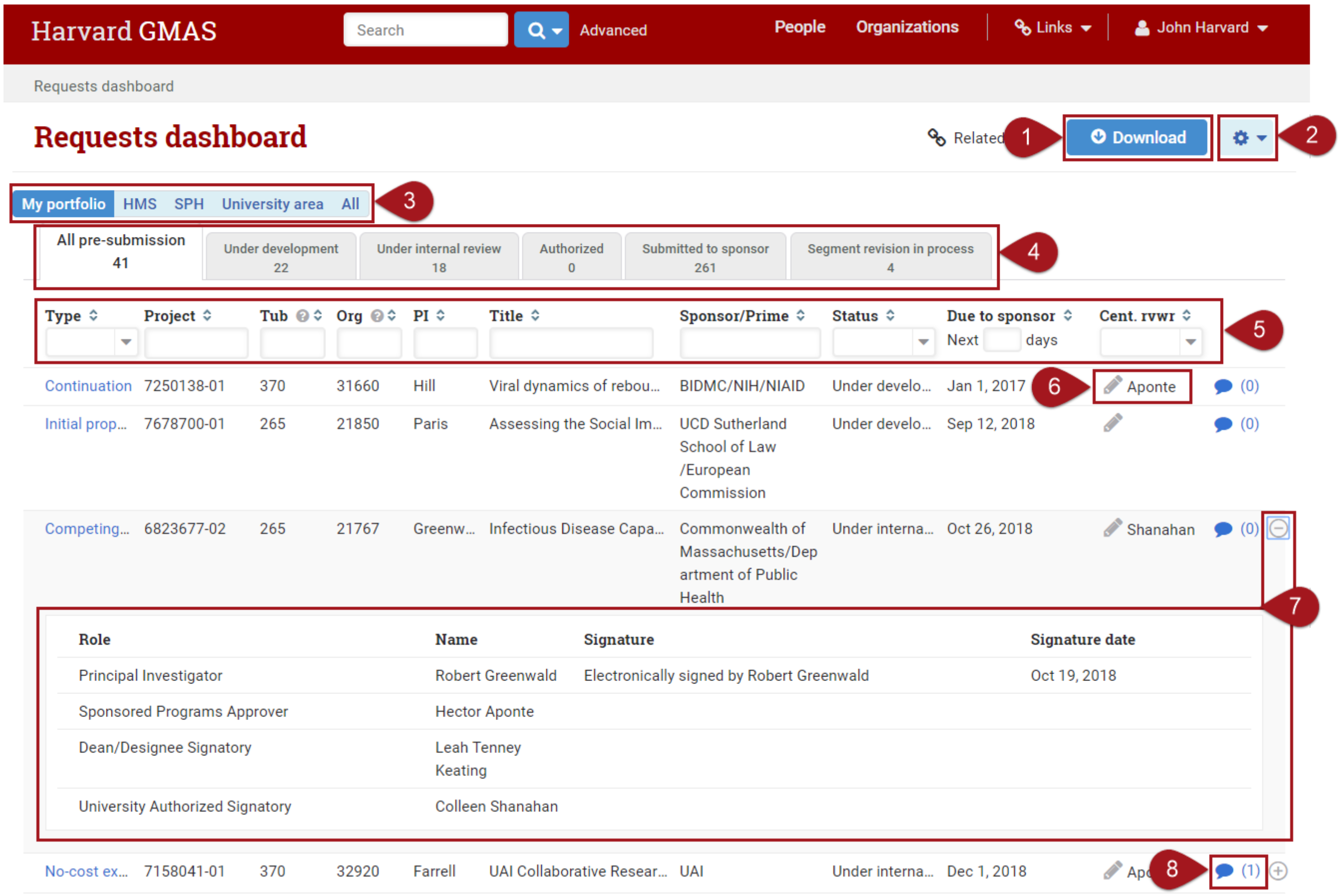
For the purposes of this document, all requests and proposals will just be referred to as "requests".

Who can see the dashboard

Anyone that has access to GMAS will be able to view the Requests dashboard. The dashboard is accessible from the GMAS homepage on the right.



Requests dashboard overview



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1. Download

The requests dashboard has a <**Download**> button located in the top right side of the screen which will download an excel spreadsheet with all data that is available on the dashboard (based on security). Set filters on the dashboard will not be reflected in the download.

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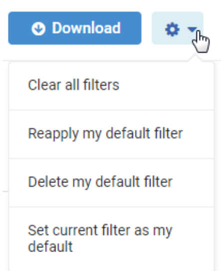
2. Additional dashboard actions

There are four actions that appear in the additional dashboard 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.
- **Reapply my default filter:** This action appears in the drop down a default filter is set, but the current sorts and filters to not match the saved default filter. 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 previously applied as the default. Selecting this option does not reset the sorts and filters in your current session (see Clear all filters).
- **Set current filter as my default:** This action is always available in the drop down. Setting the current filter as my default will save the filter and sorts that are currently applied to the requests dashboard as the default for each time you access the dashboard for the first time in a GMAS session (time of period you are logged into GMAS).

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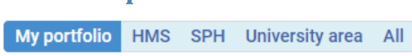
3. Top tier filters



Top tier filters allow flexibility to view requests across the different tabs in the dashboard by portfolio or area (based on security).

- **My portfolio** – Displays all requests where the individual logged in plays a role on the administrative team.
- **HMS** – Displays all requests in HMS (this excludes the WYSS requests which are included in the University area filter).
- **SPH** – Displays all requests within SPH.
- **University area** – Displays all requests for the University area and WYSS (all those requests in areas other than SPH and HMS).
- **All** – Displays all requests regardless of area.

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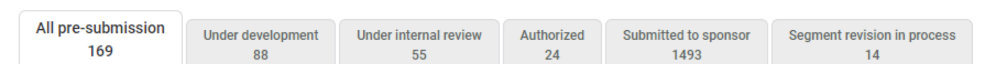
4. Tabs



The dashboard is split into 6 different **tabs**. These tabs represent the statuses of requests.

- **All pre-submission** – All requests in a status of “Incomplete”, “Under development”, “Under internal review”, or “Authorized” appear in this tab (this is the only tab where requests in “Incomplete” status can be found, but requests in all other statuses also appear in their own tabs).
- **Under development** – All requests in “Under development” status appear in this tab. These are requests where the request guided steps have been completed, but the request has not yet been locked and routed for signature. These requests will also appear under the “All pre-submission” tab.
- **Under internal review** – All requests in “Under internal review” status appear in this tab. These are the requests that have been locked and routed for signature but have not been signed yet by all parties. These requests will also appear under the “All pre-submission” tab.
- **Authorized** – All requests in “Authorized” status appear in this tab. These are requests that have been signed off on by all parties but has not yet been submitted to sponsor or awarded yet. These requests will also appear under the “All pre-submission” tab.
- **Submitted to sponsor** – All requests in “Submitted to sponsor” status appear in this tab. These are requests that have been submitted to sponsor but has not been awarded or is not in the process of being awarded.
    - **Just-in-time request that are in a “Submitted to sponsor” status will be excluded from this tab.
- **Segment revision in process** – All requests that are in “Segment revision in process” status appear in this tab. Segment revisions that are not associated to a request will not appear in this tab.

Requests will no longer be visible from the requests dashboard once they have either been closed or awarded (unless another segment revision is processed from an awarded request, in which case it will temporarily appear in the “Segment revisions in process” tab).

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5. Filterable and sortable columns

Each tab has its own set of **filterable and sortable columns**. When a filter or sort is set to a column that appears across multiple tabs, the filter or sort will remain in place while navigating in and out of those tabs (a filter will not remain in place if a filter is set to show data that does not exist in the tab being navigated to). Filters and sorts will also remain in place while navigating in and out of the dashboard during a single GMAS session (a session is a period of time logged in uninterrupted by logging out or being kicked out after an hour of inactivity). Filters will reset when navigating to a tab that does not share the filtered data in a shared column. Filters and sorts will both reset when the filtered column does not exist in a tab navigated to.

- **Type** – This column appears in all tabs. This is the **request name** (ex: Continuation). The filter for this column is a multi-select drop-down menu with all possible request types listed.

  For projects that are listed as "Billing Agreement", all request types associated to the project will be listed in the dashboard as "Billing agreement" instead of the request type (ex: Initial request).
- **Project** – This column appears in all tabs. This is the **project number** associated with the segment the request was created in. The filter for this column is a text entry field.
- **Tub** – This column appears in all tabs. This is the **owning tub** of the request. The filter for this column is a text entry field. Tub can be filtered in the following ways:
  - Individual tub (ex: “520”)
  - Multiple tubs (ex: “420, 520. 550”)
  - Range of tubs (ex: “420-550”)
  - Combination of any of the above (ex: “375, 420, 520-5502, 630-655”)

  Note: only the individual search example allows for partial matching and matches at the front (ex: “10” would result in 100, but would not result in 310)
- **Org** – This column appears in all tabs. This is the **owning org** of the request. The filter for this column is a text entry field. Org can be filtered in the following ways:
  - Individual org (ex: “28741”)
  - Multiple orgs (ex: “28741, 28751, 28761”)
  - Range of orgs (ex: “28711-28761”)
  - Combination of any of the above (ex: “28711, 28713, 28731-28761, 31570-32000”)

Note: only the individual search example allows for partial matching and matches at the front (ex: “001” would result in 00100, but would not result in 35001)

- **PI** – This column appears in all tabs. This column displays last name of the **project owning PI**. The filter is a text entry field which only allows filtering by the PI’s last name.
- **Title** – This column appears in all tabs. This column displays the **title of the request**. The filter is a text entry field.
- **Sponsor/Prime** – This column appears in all tabs. This column displays the **abbreviation (or full name if an abbreviation is not available) of the sponsor**. If there is a **prime sponsor associated to the request** it will display in the same way separated by a “/”. The filter is a text entry field. Sponsor/Prime can be filtered the following ways:
  - Organization as the sponsor or prime sponsor (ex: “NSF”)
  - Organization as the sponsor only (ex: “NSF/”)
  - Organization as the prime sponsor only (ex: “/NSF”)
  - Sponsor and prime sponsor combination (ex: “MIT/NSF”)

  Note: Matches will look at the abbreviation and the full organization name (ex: filtering by “MGH” or “Massachusetts General Hospital” will result in requests where the sponsor or prime sponsor is MGH). Partial matching will match at the front and the back (ex: "ns" or "sf" would result in NSF as the sponsor or prime sponsor, "sf/" would result in NSF as the sponsor, "/ns" would result in NSF as the prime sponsor).

- **Status** – This column only appears in the "All pre-submission" tab. This column displays the **requests status**. The filter for this column is a multi-select drop-down menu with all possible statuses listed.
- **Due to sponsor** – This column appears in the "All pre-submission", "Under development", "Under internal review", and "Authorized" tabs. This column displays the **date the request is due to the sponsor**. The filter is a numeric entry field that counts out future days (ex: if the number 0 is entered requests due to sponsor today and in the past will display, and if the number 10 is entered requests due to sponsor ten days from today's date and prior to then will display).
- **Date routed** – This column appears in the "Under internal review" tab. This column displays the **date the request was locked and routed for review**. The filter is a numeric entry field that counts out past days (ex: if the number 0 is entered requests locked and routed today will appear, and if the number 10 is entered requests locked and routed in the past 10 days including today will appear).
- **Date authorized** – This column appears in the "Authorized" tab. This column displays the **date the request was fully signed by all parties identified in the lock and route process**. The filter is a numeric entry field that counts out past days (ex: if the number 0 is entered requests fully signed today will appear, and if the number 10 is entered requests fully signed in the past 10 days including today will appear).
- **Cent. rvwr** – This column appears in the "All pre-submission", "Under development", "Under internal review", and "Authorized" tabs. This column displays the **individual listed as the central reviewer of the request**. The filter is a multi-select drop-down menu with a list of individuals currently listed as central reviewers. *For more information about how these individuals are set on the dashboard, see 5 below.*
- **Date submitted** – This column appears in the "Submitted to sponsor" and "Segment revision in process" tabs. This column displays the **date the request was submitted to the sponsor**. The filter is a numeric entry field that counts out past days (ex: if the number 0 is entered requests submitted today will appear, and if the number 10 is entered requests submitted in the past 10 days including today will appear).
- **Submitted by** – This column appears in the "Submitted to sponsor" tab. This column displays the last name of the **individual who submitted the request to the sponsor**. The filter is a text entry field which only allows filtering by the submitters last name.
- **Notice associated** – This column appears in the "Submitted to sponsor" tab. This column displays a "Yes" or "No" to indicate whether a **sponsor award notice** has been associated to the request or not. The filter is a drop-down menu with a Yes and No option.
- **Revision started on** – This column appears in the "Segment revision in process" tab. This column displays the **date the segment revision was started**. The filter is a numeric entry field that counts out past days (ex: if the number 0 is entered requests with a segment revision started today will appear, and if the number 10 is entered requests with a segment revision started in the past 10 days including today will appear).
- **Revision created by** – This column appears in the "Segment revision in process" tab. This column displays the last name of the **individual who started the segment revision**. The filter is a text entry field which only allows filtering by the submitters last name.

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6. Central reviewer

GMAS will determine based on area, request type, and standing team assignments whether an individual should populate into the **central reviewer (Central rvwr) role** or not when a request is created.

a. If GMAS determines that an individual should populate into the row as central reviewer, only the central offices can change the assignment (the pencil icon that appears next to the central reviewer will only be visible to central offices).
b. If GMAS determines that an individual should not populate into the row as central reviewer, those who have the security to create requests under the primary managing org, and the central office can update the central reviewer. Once the central reviewer is set, only the central office can change the central reviewer.

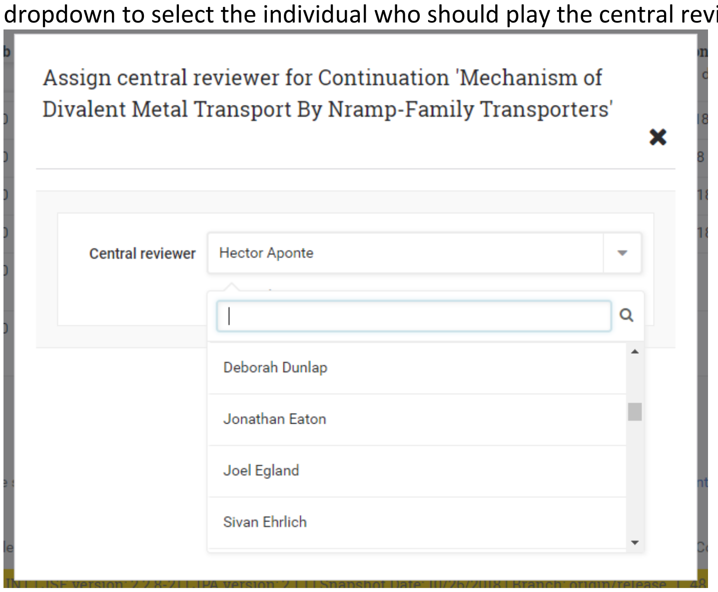
Central office view:

Continuation	7108628-01	370	31570	Gaudet	Mechanism of Divalent M...	NIH/NIGMS	Under develo...	Nov 15, 2018	Aponte	(0)
New accou...	7458489-01	370	31570	Hensch	ATTENTIONAL CONTROL...	Bezos Family Foundation	Under develo...			(0)

Department/School view:

Continuation	7108628-01	370	31570	Gaudet	Mechanism of Divalent M...	NIH/NIGMS	Under develo...	Nov 15, 2018	Aponte	(0)
New accou...	7458489-01	370	31570	Hensch	ATTENTIONAL CONTROL...	Bezos Family Foundation	Under develo...			(0)

To add or change the central reviewer, select the pencil icon. Once the icon is selected, a modal will appear with a dropdown to select the individual who should play the central reviewer role.



Once done is selected from this modal, the individual selected will be listed as the central reviewer on both the dashboard and on the request

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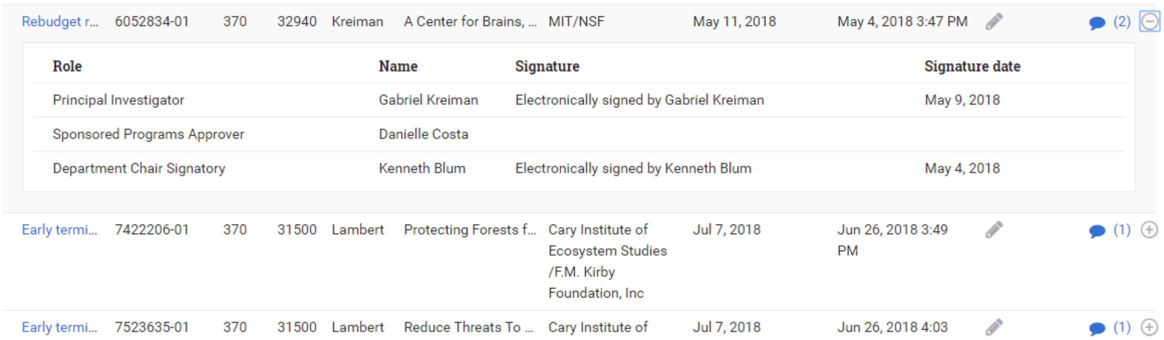
7. Expand

For requests that are in “Under internal review” or “Authorized” status, an **expanded view** is available. The expanded view will display the list of signatures associated to the request as pending or completed.



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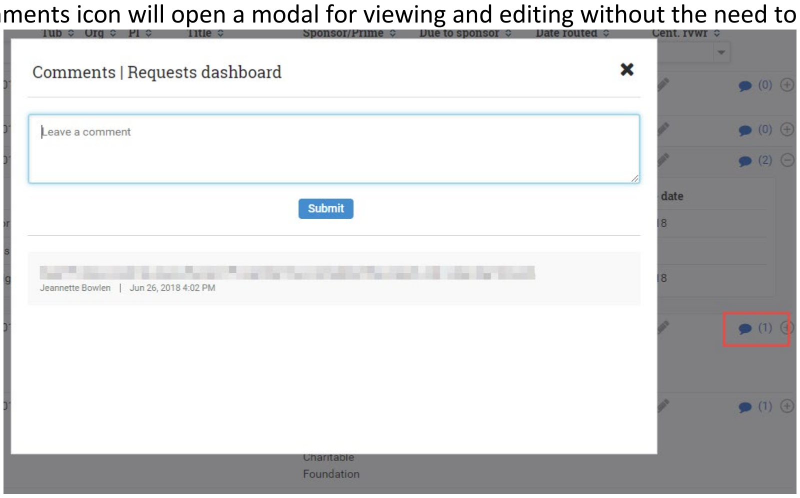
8. Comments

Every request on the dashboard has a link to **add and view existing comments associated to the request**. Selecting the comments icon will open a modal for viewing and editing without the need to leave the dashboard.



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For feedback or questions, please reach out to the GMAS help desk at [contactgmas@harvard.edu].