

Grant Managers - Administration Portal User Guide

Research Administration Portal

January 24, 2024

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The Research Administration Portal shows faculty, researchers, grant managers, and other research administration staff their outstanding research administration and compliance activities and provides an overview of researchers’ portfolios.

The application includes certain projects, protocols, and related tasks from **AGREEMENTS-DUA, COMS, DATA SAFETY, ESTR, GMAS, HMS IACUC**, statements from **ECRT**, certifications from **OAIR**, and assigned training courses from the **HARVARD TRAINING PORTAL**.

Grant managers have the ability to access To Do items assigned to them, as well as To Do items and projects and protocols for the researchers they support. * Grant managers must have Department Administrator access in GMAS in order to have the additional grant manager options in the Portal that are described below.

Accessing the Research Administration Portal

The Research Administration Portal is available to anyone with an active HarvardKey. After logging into the system, a personalized view of the information and actions relevant to you will display.

To log in:

1. Locate your [HarvardKey and password](#)
2. Navigate to adminportal.research.harvard.edu
3. Enter your credentials (email address and password) in the appropriate spaces
4. Click the Sign In button
5. Once authenticated, you will be taken into the Portal

Items To Do (Home Page)

Overview

The Items To Do page lists research administration tasks that may require your attention. These items may be assigned to you as a Department Administrator in GMAS and/or as a contact on a protocol or submission in Agreements-DUA, COMS, Data Safety, ESTR-IRB, or HMS IACUC. These To Do items are included in two different categories: Items for Me To Do and Items for My Colleagues To Do. Below the To Do lists, a notice will display if any protocols or submissions where you are a contact are nearing expiration.

The **Items For Me To Do** category includes:

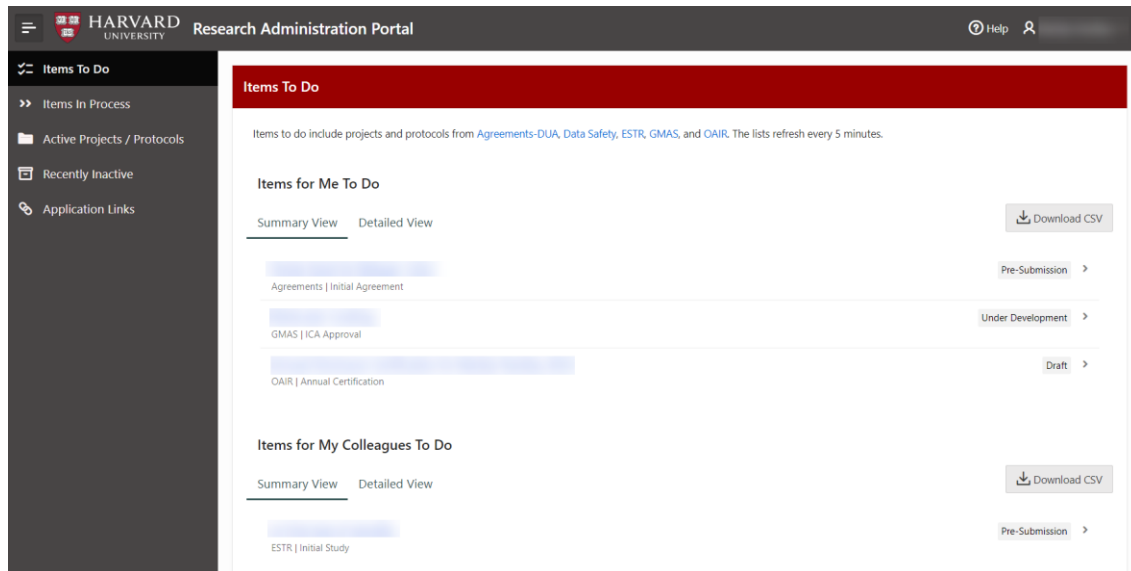
* HMS IACUC Protocols are only visible to researchers named on the project (such as the Principal Investigator or a member of the study team) OR if the person has been named as a delegate in the Research Administration Portal by a researcher named on the project.

- Protocols/submissions from Agreements-DUA, COMS, Data Safety, ESTR-IRB, and HMS IACUC where you are a contact and are able to take the action currently required - for example, if you are a Primary Contact on a Data Use Agreement for which clarifications have been requested, that submission will display in Items for Me To Do;
- GMAS To Do items assigned to you for projects whose PI is in your list of researchers in the Portal (see the My Settings Researchers section below for more information on managing your list of researchers); and
- Training courses in the Harvard Training Portal that are assigned to you and have not been completed.

The **Items for My Colleagues To Do** category includes

- Protocols/submissions from Agreements-DUA, COMS, Data Safety, ESTR-IRB, and HMS IACUC where you are a contact and are NOT able to take the action currently required - for example, if you are a Primary Contact on an ESTR-IRB protocol that needs to be submitted, because only the Principal Investigator may submit the protocol, this item will display in the Items for My Colleagues To Do List – and
- GMAS To Do items assigned to you for projects whose PI is NOT in your list of researchers in the Portal (see the My Settings Researchers section below for more information on managing your list of researchers).

The **Items Nearing Expiration** section will show if there are any Protocols/submissions from Agreements-DUA, COMS, Data Safety, ESTR-IRB, and HMS IACUC where you are a contact that are expiring within the next three months. To see the details of any expiring submissions, click on the link to the Active Projects/Protocols page.



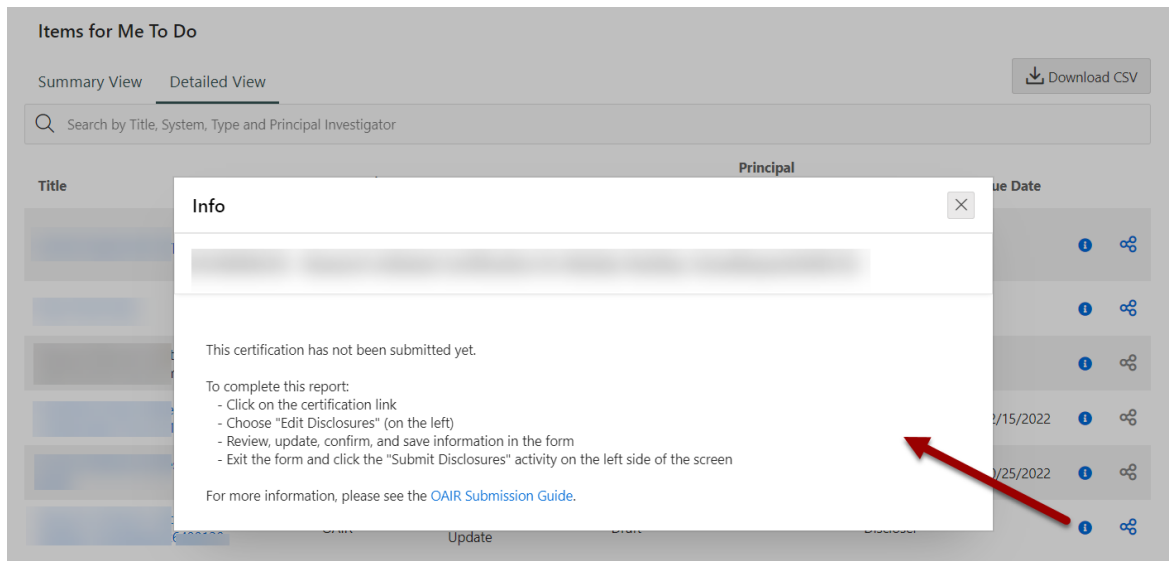
To Do List Navigation

To complete an item in your To Do list:

To complete an item, click on the Title in the Summary or Detail View. The link will take you to the submission or training course in the home system where you can take the required action.

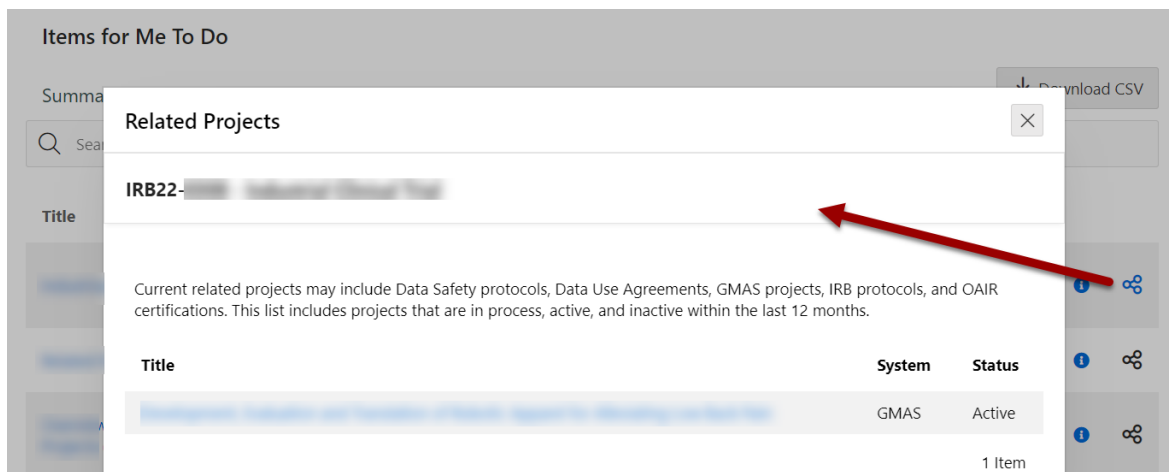
For more information on next steps:

On the Detailed View, to the right of each item is an information icon. Clicking on the information icon will display instructions for completing the required task.



To view related projects:

On the Detailed View, to the right of each item is a related projects icon. Clicking on this icon will display information about projects that may be connected to the item in the list, including COMS registrations, Data Safety protocols, data use agreements, GMAS projects, HMS IACUC protocols, IRB protocols, and OAIR certifications. If the icon is grayed out, there are no related projects to display.



Listing Details
Items for Me To Do

Items in the statuses listed below from Agreements-DUA, COMS, Data Safety, ESTR-IRB, GMAS, and HMS IACUC will display in the Items for Me To Do List for the appropriate roles. In addition, incomplete courses from the Harvard Training Portal will display in this list.

Agreements-DUA

Type of Item	Included Statuses	Roles
Initial Submission or Amendment	Pre-Submission, Clarifications Requested	PI Proxy, Primary Contact
Data Safety relationship required for initial submission	Incomplete (no Data Safety submission is related)	Primary Contact

COMS

Type of Item	Included Statuses	Roles
Amendment	Changes Requested	PI Designee, Lab Contact, Study Staff

Data Safety

Type of Item	Included Statuses	Roles
Initial Protocol, Amendment, or CR	Clarification Requested	PI Proxy, Primary Contact, Study Team
Initial Protocol, Amendment, or CR	Modifications Required	PI Proxy
Amendment or CR	Pre-Submission	PI Proxy
Required Research Data Security Training	Incomplete	Person with Study Team role with access to data

ESTR-IRB

Type of Item	Included Statuses	Roles
New Information Report	Action Required	Responsible Party
Initial Protocol	Awaiting Site Materials	PI Proxy, Primary Contact, Study Team
Initial Protocol, Modification, CR, or New Information Report	Clarification Requested	PI Proxy, Primary Contact, Study Team
Initial Protocol, Modification, or CR	Modifications Required	PI Proxy, Primary Contact, Study Team
Initial Protocol, Modification, or CR	Deferred	PI Proxy, Primary Contact, Study Team
Modification or CR	Pre-Submission	PI Proxy
New Information Report	Pre-Submission	Reporter

Modification	Updating Study	PI Proxy, Primary Contact, Study Team
Data Safety relationship required for initial protocol	Incomplete (no Data Safety submission is related)	Primary Contact

GMAS

Type of Item	Included Statuses	Roles
Confirm Research Team	Incomplete	Department Administrator
Non Financial Deliverable	Incomplete	Department Administrator
Request Signature	Incomplete	Signee

Note: Non Financial Deliverable tasks where the due date is more than three months in the future are not included in the To Do list. Tasks assigned to you as a Department Administrator will display in the Items for Me To Do list when the PI is in your list of researchers in the Portal.

HMS IACUC

Type of Item	Included Statuses	Roles
Initials	Changes Requested, Clarifications Requested, Modifications Requested	Co-PI, Contact Person, Key Personnel, Other Personnel
Amendments	Pre-Submission, Changes Requested, Clarifications Requested, Modifications Requested	Co-PI, Contact Person, Key Personnel, Other Personnel

Training Portal

Type of Item	Included Statuses	Roles
Training Course	Incomplete	Assigned Trainee

Items for My Colleagues To Do

Items in the following statuses will display in the Items for My Colleagues To Do List for the appropriate roles.

System	Included Statuses	Roles
Agreements-DUA	Clarifications Requested	Collaborators
	Pre-Submission	Collaborators
COMS	Pre-Submission	PI Designee, Lab Contact, Study Staff
Data Safety	Modifications Required	Primary Contact, Study Team
	Pre-Submission	Primary Contact, Study Team
ESTR-IRB	Pre-Submission	Primary Contact, Study Team

HMS IACUC

Pre-Submission (Initials only)

Co-PI, Contact Person, Key Personnel, Other Personnel

Researcher Items To Do

Overview

Researcher items to do include any items to do that are assigned to a researcher in the list of Researchers you have selected (see the My Settings Researchers section below for more information on your list of researchers).

NOTE: HMS IACUC Protocols are not included in the Researcher Items To Do list.

To Do List Navigation

Researcher Items To Do

Researcher Items To Do are items assigned to researchers you support. They include projects/protocols and related tasks from Agreements-DUA, Data Safety, ESTR, and GMAS, certifications from OAIR, and assigned training courses from the Harvard Training Portal.

Note: Clicking on a title link will take you to the project/protocol in the home application. However, your access to the project/protocol is set in the home application, so you may not have access to all the items listed here.

Researcher Name	Title	System	Type	Status	Researcher Role	Due Date
	[Link]	Agreements-DUA	Initial Agreement	Pre-Submission	Principal Investigator	
	[Link]	Data Safety	Initial Protocol	Pre-Submission	Principal Investigator	
	Required Research Data Security Training (see the info icon for more information)	Data Safety	Research Data Security Training	Incomplete		

Accessing details for a To Do item:

To view more information related to an item, click on the Title of the item. The link will take you to the submission or training course in the home system where you can view more details.

NOTE: If you do not have access to view the project or protocol in the home system, you will not be able to see additional details even if you can see the To Do item in the Portal. Because only the associated discloser can see an OAIR certification, OAIR certifications that display in the Researcher Items To Do list will not include a link.

For more information on next steps for the researcher:

To the right of each item is an information icon. Clicking on the information icon will display instructions to the researcher for completing the required task.

To send a reminder email:

To the right of each item is an email icon. Clicking on this icon will display the contents of a reminder notice to be sent to the researcher. The notice includes the title and type of the To Do item, the due date, if relevant, and the instructions to the researcher for completing the required task. You may add additional comments to the researcher in the Comments box (1) and include/not include yourself as an additional recipient of the email (2) before sending the email (3).

Send Reminder Email

To send a reminder email to the researcher, click the **Send Email** button at the bottom of the page. You may add comments to the researcher in the **Comments** box below. Comments will be included above the standard reminder text as shown in the Email Preview.

Comments

Email Preview Include me as a recipient of this email

To

Subject: Agreements-DUA in

Dear [redacted]

You have the following research administration and compliance task in **Agreements-DUA** to complete:

Title: [redacted]
Type: Initial Agreement
Status: Pre-Submission
Due Date:

Click on the title link to access the item and complete the task.

Additional Information:

Cancel Send Email

To view related projects:

To the right of each item is a related projects icon. Clicking on this icon will display information about projects that may be connected to the item in the list, including Data Safety protocols, DUAs, GMAS projects, IRB protocols, and OAIR certifications. If the icon is grayed out, there are no related projects to display.

Project/Protocol Listings

Items In Process

Overview

Items in process include GMAS requests that are under development or review and COMS registrations, Data Safety protocols, Data Use Agreements, HMS IACUC protocols, IRB protocols, and OAIR certifications that are in review by a school or central research administration office.

Items in process are included in two different categories: My Portfolio and My Researchers' Portfolio. The My Portfolio list includes projects and protocols where you are a contact. The My Researchers' Portfolio list includes projects and protocols where one of the researchers in your list is a contact.

NOTE: HMS IACUC Protocols are not included in the My Researchers' Portfolio list.

Listing Details

Items in the following statuses will display in the In Process List.

System	Included Statuses
Agreements-DUA	<ul style="list-style-type: none"> External Review Internal Review Language Finalized Out for Signature Routing for Signature Unassigned
COMS	<ul style="list-style-type: none"> Assigned to Agenda Awaiting BSO Assignment Awaiting Correspondence BSO Post-Meeting Review BSO Review COMS Post-Meeting Review COMS Review Extension Requested Inactivation Requested
Data Safety	<ul style="list-style-type: none"> BSO Review Chair Letter Review Closure Requested Committee Review Member Review Modifications Review Modifications Review by Member Post-Review Specialist Review
ESTR-IRB	<ul style="list-style-type: none"> Action Submitted Action Submitted (sIRB Review)

	Committee Review
	Department Review
	Faculty Advisor Review
	Modifications Submitted
	Non-Committee Review
	Pending sIRB Review
	Post-Review
	Pre-Review
	Pre-Review Completed
	pSite Review
	RNI Review
GMAS	Under development
	Authorized
	Submitted to sponsor
	Under internal review
	Segment Revision in Process
	Authorized (Changes Pending)
	Awarded (Changes Pending)
	Submitted Electronically (Changes Pending)
HMS IACUC	Chair Approved Correspondence Review
	Changes Recommended by Vet Coordinator
	Department Review
	Designated Member Coordinator Review
	Designated Member Review
	Designated Member Review: Correspondence
	Pending
	Determination Complete Awaiting
	Correspondence
	Full Committee Review
	IACUC Chair Correspondence Review
	Opportunity to Request FCR
	ORSP Conditions Review
	ORSP Preliminary Review
	ORSP Review
	ORSP Review: Schedule For FCR
	Vet Coordinator Review
	Veterinarian Review
OAIR	Administrative Review

Active Projects/Protocols

Overview

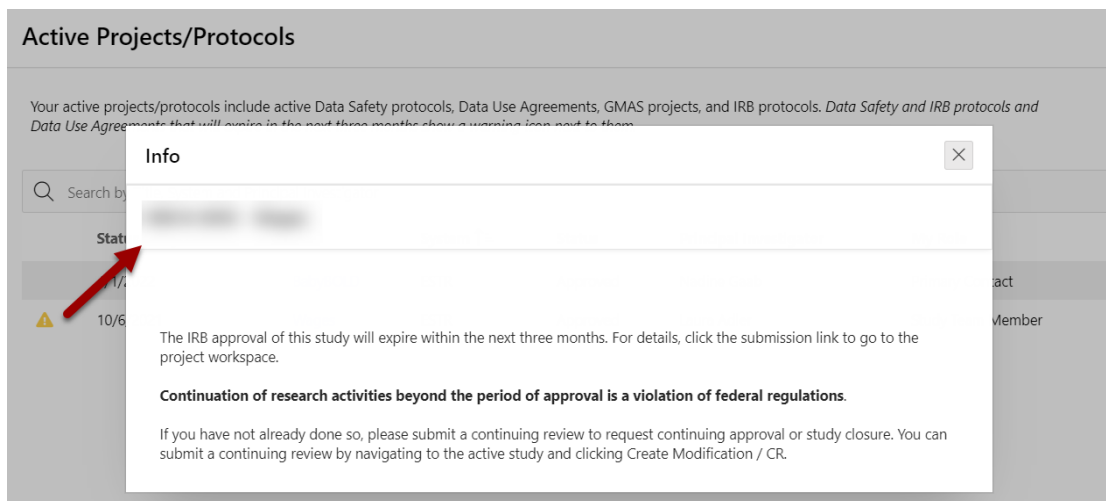
Active projects/protocols include active COMS registrations, Data Safety protocols, Data Use Agreements, GMAS projects, HMS IACUC protocols, and IRB protocols. COMS registrations (unless for a clinical trial), Data Safety protocols, HMS IACUC protocols, IRB protocols and Data Use Agreements that will expire in the next three months show a warning icon next to them.

Active projects/protocols are included in two different categories: My Portfolio and My Researchers' Portfolio. The My Portfolio list includes projects and protocols where you are a contact. The My Researchers' Portfolio list includes projects and protocols where one of the researchers in your list is a contact.

NOTE: HMS IACUC Protocols are not included in the My Researchers' Portfolio list.

For more information on items nearing expiration:

To the left of each item is a warning icon. Clicking on the warning icon will display instructions for extending the approval period for the submission or closing it out.



Listing Details

Items in the following statuses will display in the Active List.

System	Included Statuses
Agreements-DUA	Active Evergreen
COMS	Active
Data Safety	Approved
ESTR-IRB	Active External IRB Ceded Review

	Approved
	Not Human Research
	Human Research, Not Engaged
GMAS	Active
HMS IACUC	Approved

Follow-on submissions from Agreements, COMS, Data Safety, ESTR-IRB, and HMS IACUC that have been completed are not included.

Project / Protocol Teams

Overview

Project Protocol Teams displays the active status of all team members associated with the PI's projects. This includes Initial Study and Segment project types.

NOTE: HMS IACUC Protocols are not included in the My Researchers' Portfolio list.

Listing Details

Project Protocol Teams displays the active status of all team members associated with the PI's projects. The page will show PI, Project ID, Project Title, Project Type, Team Member Role, Email, Active Affiliation and the Project Status as shown below.

Project / Protocol Teams

Project Protocol Teams displays the active status of all team members associated with the PI's projects. This includes Initial Study and Segment project types.

Download CSV

PI ↑	Project ID	Project Title	Project Type	Team Member Role	Team Member	Email	Active Affiliation	Project Status
			New	Study Staff			Y	Active
			New	Study Staff			Y	Active
			New	Study Staff			Y	Active

Recently Inactive

Overview

Inactive projects/protocols include COMS registrations, Data Safety protocols, Data Use Agreements, GMAS projects, HMS IACUC protocols, and IRB protocols that have closed or expired within the last 12 months.

Inactive projects/protocols are included in two different categories: My Portfolio and My Researchers' Portfolio. The My Portfolio list includes projects and protocols where you are a contact. The My Researchers' Portfolio list includes projects and protocols where one of the researchers in your list is a contact.

NOTE: HMS IACUC Protocols are not included in the My Researchers’ Portfolio list.

Listing Details

Items in the following statuses will display in the Inactive list for 12 months after they become inactive.

System	Included Statuses
Agreements-DUA	Expired Terminated
COMS	Expired Inactive
Data Safety	Closed Lapsed Suspended
ESTR-IRB	Closed Complete Disapproved Inactive Lapsed Suspended Terminated
GMAS	Closed
HMS IACUC	Expired Inactive Closed Suspended

Working with Lists

Searching in a List

You can search the lists on the Items To Do, Items In Process, Active Projects/Protocols, and Recently Inactive pages by Title, System, Type (when present) and Principal Investigator. Typing a word or text into the search box above the list will search by that word or text and will display suggestions for filtering based on common values in the list.

Active Projects/Protocols

Your active projects/protocols include active Data Safety protocols, Data Use Agreements, GMAS projects, and IRB protocols. Data Safety and IRB protocols and Data Use Agreements that will expire in the next three months show a warning icon next to them. Download CSV


✕

📦 System: **Agreements**

Multiple search terms and filters can be applied; click on the X next to any term to remove it from your search.

Active Projects/Protocols

Your active projects/protocols include active Data Safety protocols, Data Use Agreements, GMAS projects, and IRB protocols. Data Safety and IRB protocols and Data Use Agreements that will expire in the next three months show a warning icon next to them.

 Download CSV



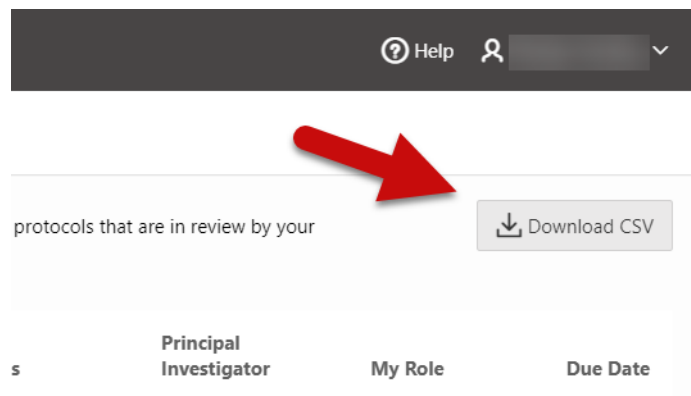
Sorting a List

Each list is sorted by System, Item/Submission Type, and Title. You can sort the list in a different order by clicking on the header for the column you want to sort by. Clicking the column header once will sort the records in ascending order. Clicking the column header again will sort the records in descending order.

Downloading a List

Each detailed list can be downloaded as a CSV file. The CSV file will include the information displayed in the detailed list, as well as the project/protocol ID and a direct link to the project/protocol.

To download the list, click on the **Download CSV** button above the list you want to download.



Additional Options for the Researcher To Do list

The Researcher To Do list has a number of additional options for working with the information in the list and even allows you to create and save custom views.

Searching

The search box allows you to search across all columns or search a specific column. Enter a search term into the search box and click Go to search across all columns or click on the magnifying glass and select a specific column to search only that column.

Once a search term has been applied, it will display above the report list. Click the remove X icon on the right to remove the search term filter.

Reports

The reports dropdown to the right of the search box includes the default reports and any custom reports you have created. The default reports are the Primary Report, which sorts To-Do items by Researcher Name, System, Title, and Type, and a Grouped by Researcher report with Due Dates Highlighted report, which highlights overdue items and those due within 14 days.

Actions

- **Column Selector** – Click the Actions button and select Columns to modify the columns displayed. The columns on the right display. The columns on the left are hidden. You can reorder the displayed columns using the arrows on the far right.
- **Filter** – Click on the Actions button and select Filter to access additional filtering options. You can filter on a column or by row. To filter by column, select a column (it does not need to be one that displays), select an operator and enter an expression to compare against. Expressions are case sensitive. Use % as a wild card. To filter by row, select the Row button and create the filter expression using the lists displayed.
- **Sorting** – Click on the Actions button and select Data and then Sort to access additional sorting options, including sorting by multiple columns. You can also specify how to handle NULLs. The default setting always displays NULLs last or always display them first. The resulting sorting displays to the right of the column headings in the report.
- **Grouping** – Click on the Actions button and select Format and then Control Break to group on one or more columns. This pulls the columns out of the interactive report and displays them as group headers. Records will be grouped by the value in the Control Break column.
- **Highlight** – Click on the Actions button and select Format and then Highlight to format specific cells based on conditions. For example, you can tasks based on due date or items from specific systems.
- **Save Report** – Click on the Actions button and select Report and then Save Report to save the customized view for future use. You provide a name and optional description for the report. You can choose to make the report accessible to the public (that is, all users who can access the primary default report) or make it private (accessible only to you). If you save customized reports, they will be available in the Reports selector that displays above the list.
- **Reset** – Click on the Actions button and select Report and then Reset to return the view to the default settings, removing any customizations that you have made.
- **Download** – **Click on the Actions button and select Download to export the list. The download formats include CSV, HTML, Excel, PDF, or email.**

Column Heading Menu

Clicking on any column heading exposes a column heading menu. Options include:

- **Sort Ascending** icon sorts the report by the column in ascending order.
- **Sort Descending** icon sorts the report by the column in descending order.
- **Hide Column** hides the column. Not all columns can be hidden. If a column cannot be hidden, there will be no Hide Column icon.
- **Control Break Column** creates a group on the column. This pulls the columns out of the list and displays them as group headers. Records will be grouped by the value in the Control Break column.

- **Filter Text Area** is used to enter case insensitive search criteria (no need for wild cards). Entering a value reduces the list of values at the bottom of the displayed menu. You can then select a value from the list and the selected value will be created as a filter.

Report Settings

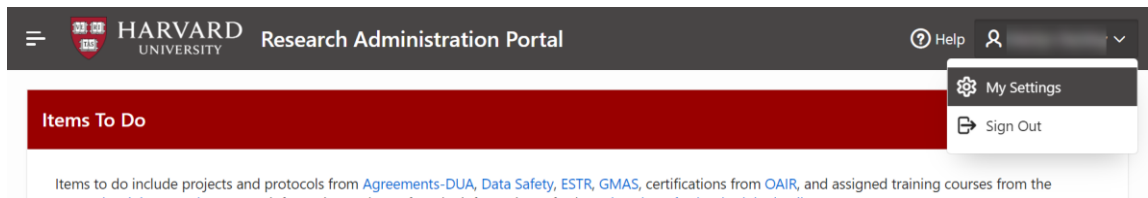
If you customize the display of the list, the customizations added display below the Search bar and above the list. This area can be collapsed and expanded using the arrow icon on the left.

For each customization/setting, you can:

- Edit a setting by clicking the name.
- Disable/enable a setting by unchecking or checking the Enable/Disable check box on the left. Use this control to temporarily turn a setting off and on.
- Permanently remove a setting by clicking the remove X icon on the right.

My Settings

The My Settings page is available by clicking on your name in the top right corner of the site and selecting **My Settings** from the dropdown.



Resources

The resources section includes a link to the **Other support and activities report**. Clicking on this link will direct you to GMAS and the report will download automatically.

Note: The report will only include information for the person logged into the Portal. This download option does not allow you to download the report for other people.

Manage my Researchers

You may select researchers in the Portal in order to view To Do items and other research portfolio information for the researchers you support.

Note: This option is only available to staff who have a Department Administrator role in GMAS. For more information about requesting appropriate GMAS access, see [GMAS Help](#).

To Add a Researcher

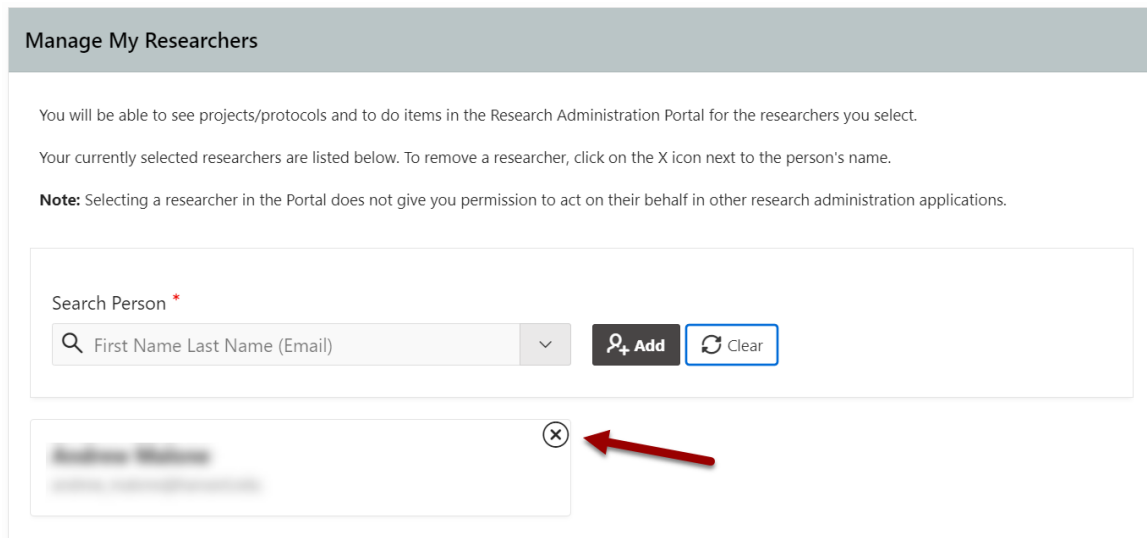
1. In the **Search Person** box, search for a person by first name, last name, and/or email address
2. From the list of search results, click on the correct person name
3. Click the **Add** button next to the Search Person box

4. In the confirmation box, click **Add** again

Your selected researchers will appear below the search box.

To Remove a Researcher

1. Click on the **X** to the name of the person whom you would like to remove
2. In the confirmation box, click **Remove**



Delegates

Delegates that you assign are able to see all of your To Do List items and projects/protocols in the Research Administration Portal. When you assign a delegate, that person will receive an email notification.

Note: Assigning a delegate in the Portal does not give that person permission to act on your behalf in other research administration applications.

To Assign a Delegate

5. In the **Search Person** box, search for a person by first name, last name, and/or email address
6. From the list of search results, click on the correct person name
7. Click the **Assign** button next to the Search Person box
8. In the confirmation box, click **Assign** again

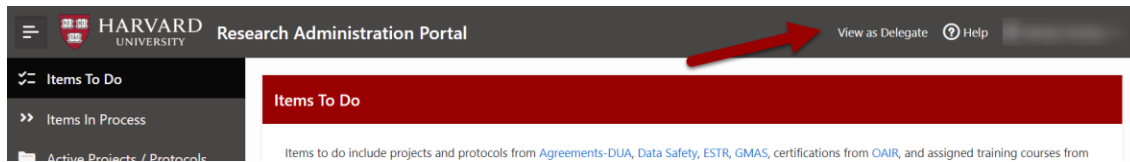
Your assigned delegates will appear below the search box. The new delegate will receive an email notification informing them of the new assignment.

To Remove a Delegate

3. Click on the **X** to the name of the person whose delegate access you would like to remove
4. In the confirmation box, click **Unassign**

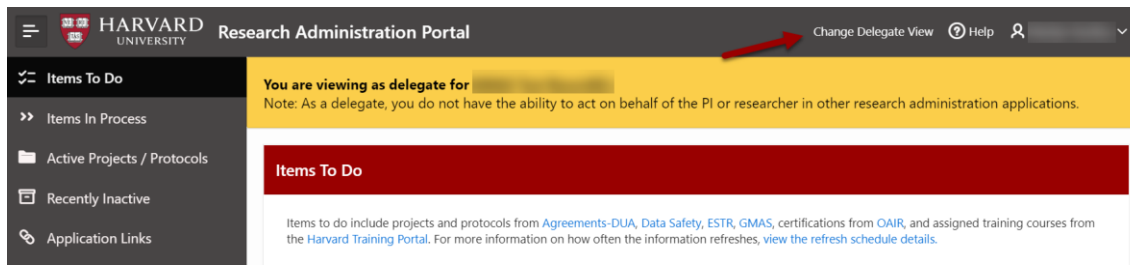
Delegate View

If you have been assigned as a delegate by another person, you can access their To Do List items and projects/protocols, by clicking on the **View as Delegate** link at the top of the page.



The View as Delegate pop-up will show you all the people who have assigned you as a delegate. Click on a name in the list to view that person's information.

When you are viewing another person's information, a yellow banner will display at the top of each page indicating whose information you are viewing. To return to your own view, click on the **Change Delegate View** link at the top of the page and click the **Return to My View** button on the View as Delegate pop-up.



Additional Information

Portal URL: <https://adminportal.research.harvard.edu>

Support Site: <https://ras.fss.harvard.edu/research-administration-portal>

Help Desk: research_adminportal_help@harvard.edu