

The Research Administration Portal shows faculty and researchers their outstanding research administration and compliance activities and provides an overview of their portfolio. The application includes certain projects and protocols from **AGREEMENTS-DUA**, **DATA SAFETY**, **ESTR**, and **GMAS**, certifications from **OAIR**, and assigned training courses from the **HARVARD TRAINING PORTAL**.

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

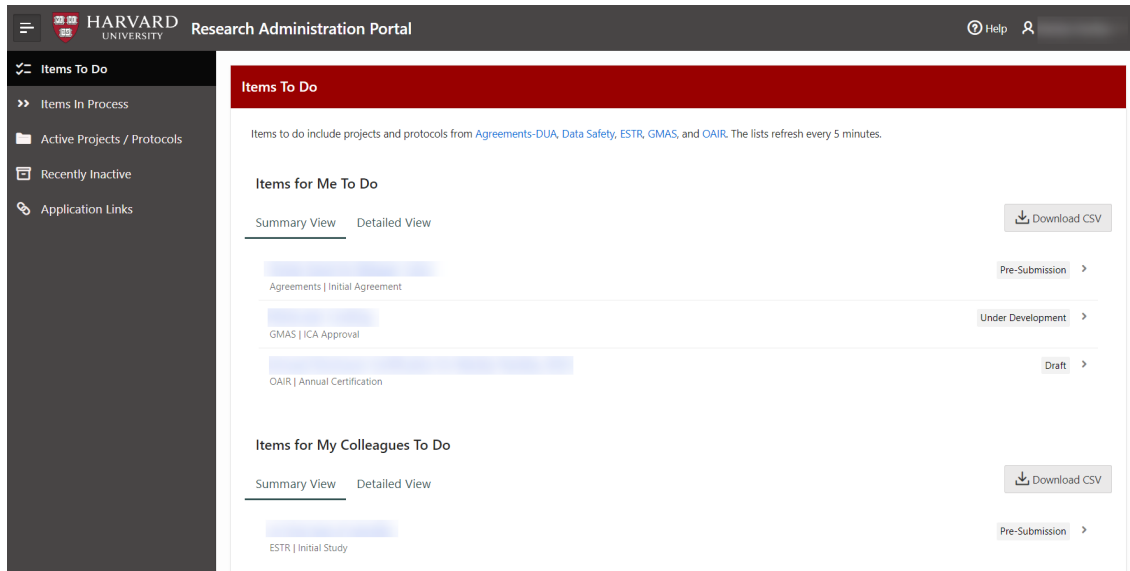
The Items To Do page lists your projects/protocols where the Principal Investigator (PI) or a research/study team member is required to take action to move that item to the next step in the process, as well as other research administration tasks that may require your attention. These To Do items are 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 of your projects/protocols are nearing expiration.

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

- Projects/protocols from Agreements-DUA, Data Safety, ESTR-IRB, and GMAS where you are able to take the action required - for example, if you are required to sign a funding proposal in GMAS, that proposal will display in the Items for Me To Do list when it is ready for you to sign;
- Training courses in the Harvard Training Portal that are assigned to you and have not been completed;
- Incomplete ancillary reviews from Agreements-DUA, Data Safety, and ESTR-IRB that are assigned to you; and
- Your outstanding OAIR certifications.

The **Items for My Colleagues To Do** category includes your projects/protocols where you do not have the ability to take the action required and a PI or someone else on your study/research team must take the action. For example, in ESTR, only the Principal Investigator may submit a new protocol. For other members of the study team, an ESTR submission in the pre-submission status will display in the Items for My Colleagues To Do List.

The **Items Nearing Expiration** section will show you if you have any projects/protocols from Agreements-DUA, Data Safety, and ESTR-IRB 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.



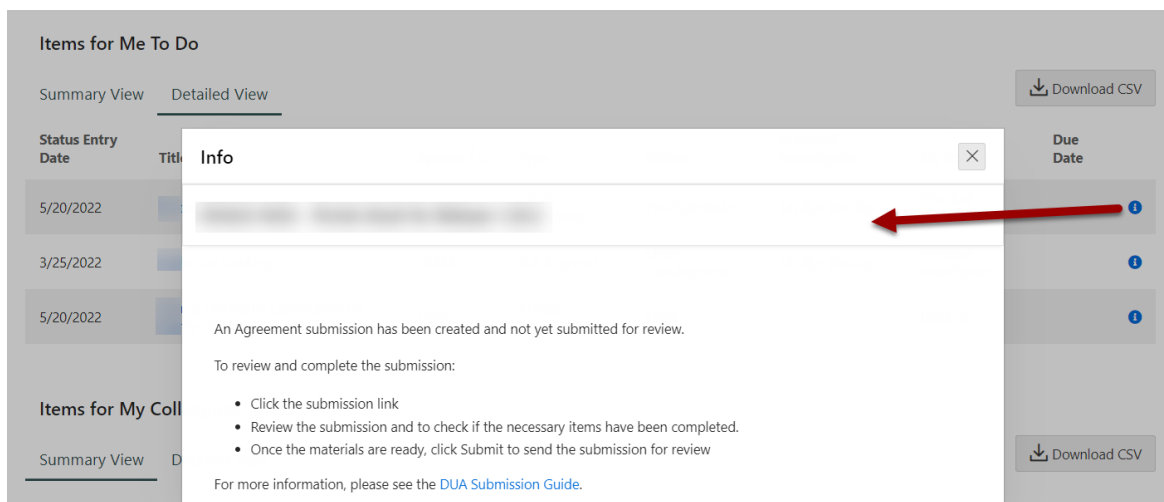
To Do List Navigation

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.



Listing Details

Items for Me To Do

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

System	Included Statuses	Roles
Agreements-DUA	Clarifications Requested	PI, PI Proxy, Creator
	Pre-Submission	PI, PI Proxy, Creator
Data Safety	Clarification Requested (BSO Review)	PI, PI Proxy, Primary Contact, Study Team
	Clarification Requested (Closure Requested)	PI, PI Proxy, Primary Contact, Study Team
	Clarification Requested (Committee Review)	PI, PI Proxy, Primary Contact, Study Team
	Clarification Requested (Member Review)	PI, PI Proxy, Primary Contact, Study Team
	Clarification Requested (Specialist Review)	PI, PI Proxy, Primary Contact, Study Team
	Modifications Required	PI, PI Proxy
ESTR-IRB	Pre-Submission	PI, PI Proxy (Follow-ons only)
	Action Required	
	Awaiting Site Materials	PI, PI Proxy, Primary Contact, Study Team
	Clarification Requested (Advisor Review)	PI, PI Proxy, Primary Contact, Study Team
	Clarification Requested (Committee Review)	PI, PI Proxy, Primary Contact, Study Team
	Clarification Requested (Department Review)	PI, PI Proxy, Primary Contact, Study Team
	Clarification Requested (Designated Review)	PI, PI Proxy, Primary Contact, Study Team
	Clarification Requested (Pre-Review)	PI, PI Proxy, Primary Contact, Study Team
	Clarification Requested (RNI Review)	PI, PI Proxy, Primary Contact, Study Team
	Modifications Required	PI, PI Proxy, Primary Contact, Study Team
	Deferred	PI, PI Proxy, Primary Contact, Study Team
	Pre-Submission	PI, PI Proxy (follow-ons only)
	Updating Study	PI, PI Proxy, Primary Contact, Study Team
GMAS	Signature Required	Signee
	ICA Approval Incomplete	PI
	ICA Approval Needs Review	PI
	ICA Approval Under Development	PI
OAIR	Administrative Review: Response Pending	Discloser
	Discloser Review of Plan	Discloser

Draft

Discloser

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
Data Safety	Modifications Required	Primary Contact, Study Team
	Pre-Submission	Primary Contact, Study Team
ESTR-IRB	Pre-Submission	Primary Contact, Study Team

Project/Protocol Listings

Items In Process**Overview**

Your items in process include GMAS requests that are under development or review and Data Safety protocols, Data Use Agreements, and IRB protocols that are in review by your school or central research administration office.

Listing Details

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

System	Included Statuses
Agreements-DUA	External Review
	Internal Review
	Language Finalized
	Out for Signature
	Routing for Signature
	Unassigned
Data Safety	BSO Review
	Chair Letter Review
	Closure Requested
	Committee Review
	Member Review
	Modifications Review
	Modifications Review by Member
	Post-Review
ESTR-IRB	Specialist Review
	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)

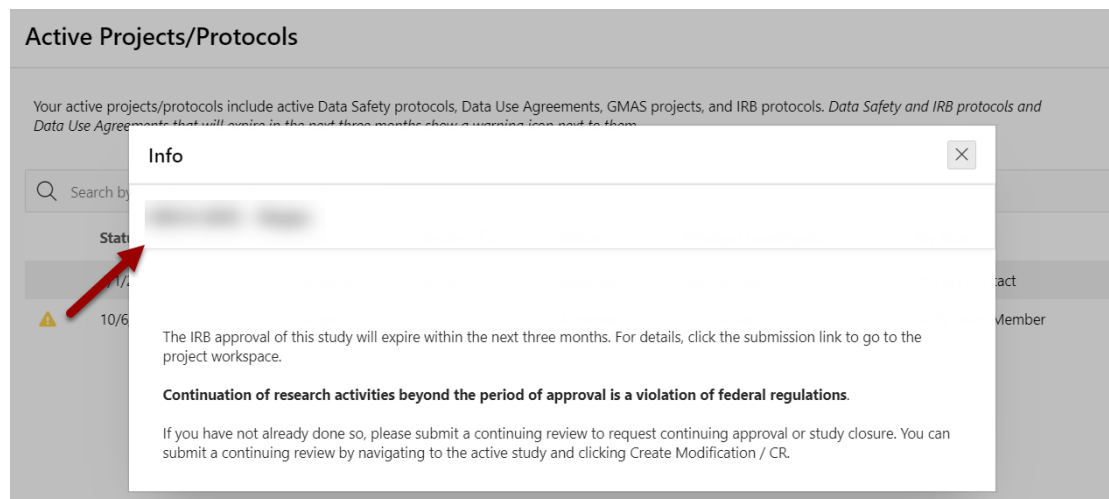
Active Projects/Protocols

Overview

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.

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
Data Safety	Approved
ESTR-IRB	Active External IRB Ceded Review Approved Not Human Research Human Research, Not Engaged
GMAS	Active

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

Recently Inactive

Overview

Your inactive projects/protocols include Data Safety protocols, Data Use Agreements, GMAS projects, and IRB protocols that have closed or expired within the last 12 months.

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
Data Safety	Closed Lapsed Suspended
ESTR-IRB	Closed Complete Disapproved Inactive Lapsed Suspended Terminated
GMAS	Closed

Working with Lists

Searching in a List

You can search the lists on the Items In Process, Active Projects/Protocols, and Recently Inactive pages by Title, System, 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](#)

Q agr X

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](#)

Q System Agreements X school X |

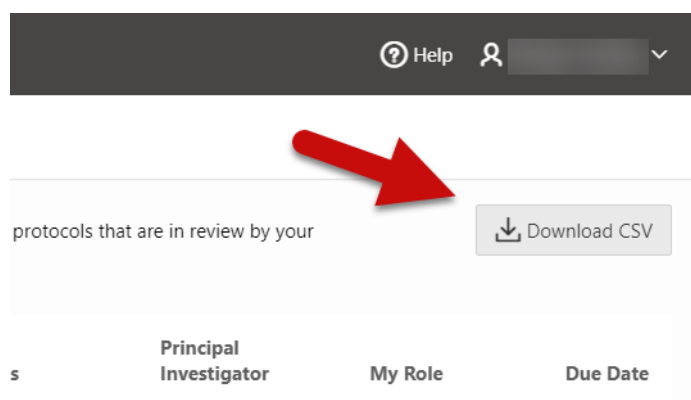
Sorting a List

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

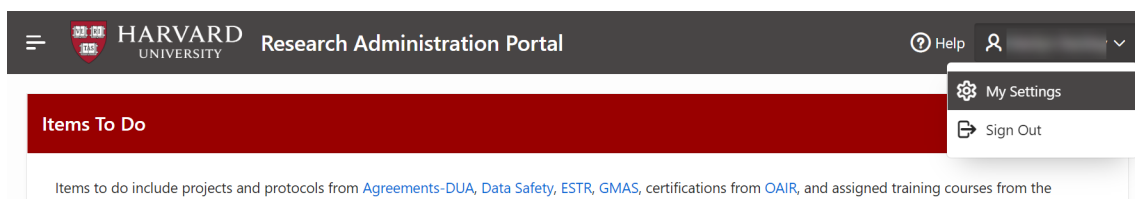
Each detailed list can be downloaded as a CSV file. The CSV file will include the information displayed in the detailed list, as well as the project/protocol ID and a direct link to the project/protocol.

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



My Settings

The My Settings page is available by clicking on your name in the top right corner of the page 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. Delegates cannot download and access the report for other people.

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

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 **Assign** button next to the Search Person box
4. 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

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

Manage Delegates

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

Your current delegates are listed below. To remove delegate access, click on the X icon next to the person's name.

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

Search Person *

First Name Last Name (Email) [Assign] [Clear]

[X]

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.

HARVARD UNIVERSITY Research Administration Portal

View as Delegate Help

Items To Do

Items In Process

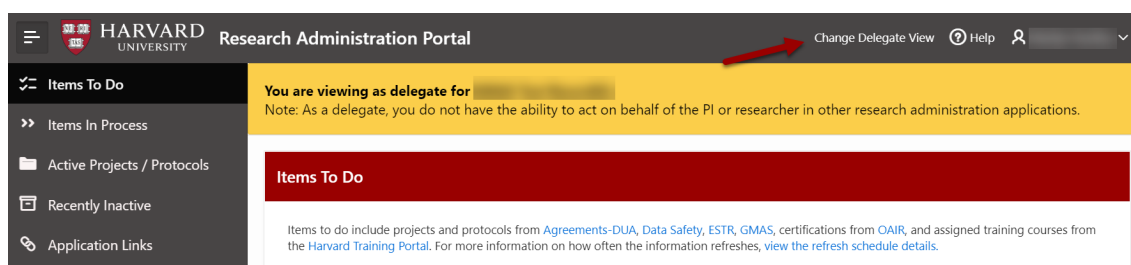
Active Projects / Protocols

Items To Do

Items to do include projects and protocols from Agreements-DUA, Data Safety, ESTR, GMAS, certifications from OAIR, and assigned training courses from

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