1.) How can one gain access to the Portal?
A: Enter https://myresearch.gatech.edu into the web browser address bar, click “Sign In” and use GT login credentials to gain access. (Note: My Research Portal is not supported with Internet Explorer 8)

2.) What does one see after logging in?
A: When logging in for the first time, a default Dashboard page will appear. The portlets on this page have been pre-configured based on feedback from PD/PI’s. A user can customize the layout of his/her Dashboard and portlets (add, delete, minimize, and move location). Any customization to the Dashboard/portlets will be saved automatically and will remain during future logins unless changed by the user.

3.) What other display features are available?
A: Many data items have mouseover information. For example, while placing the mouse over a subagreement number, the project name will appear. Depending on how a project was set up within the system, the project’s name may include the sponsor’s name (e.g., foundation or matching funds).
4.) How can one customize the Dashboard for his/her personal preferences?
   A: Each portlet can be repositioned by simply dragging and dropping the portlet name. (Place mouse over portlet name, left-click mouse and hold to drag/drop portlet into new position.)

5.) What does the “Add” option do?
   A: This allows one to add additional portlets or to create an entire new Dashboard page. (Hover mouse over [Add], located in the upper left corner of the page. A drop-down box will appear. Click on either “Page” to add an additional Dashboard page or “More” to place additional portlets on a Dashboard.)
• **Adding a new Dashboard Page:** After clicking on “Page”, a box appears along the header of the Dashboard that offers one an option to create a new “Blank”, “My Dashboard”, “Reports”, “Dashboard”, or “Systems” template page (letter a., below). Select the page desired and create a name for the new page by typing within the open text field at the top of the box. Click green check-mark to create new page (letter b., below). To delete a dashboard page, hover mouse over page name and click on the “X” to delete (letter c, below). However, the current/active page cannot be deleted while it is displayed.

![](image1)

![](image2)

![](image3)

Add Page options:

- **Blank Template** - a dashboard page that is completely blank of portlets. The user can then add specific portlets to customize his/her preference.

- **My Dashboard Template** - a template dashboard page that includes portlets associated with the user who is logged into the system at that time, e.g.; “Effort on My Projects”, “My Pending Proposals”

- **Report Template** - a dashboard page that displays links to all available contractual, financial, general and SPD reports.

- **Dashboard Template** - a template dashboard page that does not include portlets that are solely associated with the user who is logged into the system at that time, e.g.; “Effort on My Projects”, “My Pending Proposals”

- **Systems Template** - a dashboard page that displays links to all available compliance, contractual, general tools, proposal development and research admin systems.
• Users can reposition the order of pages that are displayed on a Dashboard by left-clicking a page name and dragging the name to a desired location while keeping the mouse button depressed (see examples, below).

a.) Create a new page:

b.) Hover mouse over page name, left-click mouse and hold, drag to new location:

c.) Release left-click button to set page in a new order:

• Placing additional portlets on Dashboard: After clicking on “More”, a box appears that lists a set of portlets which one can drag and drop into his/her Dashboard. If the list of portlet names is not displayed, click on “My Research” to display them. Insert the new portlet by either dragging and dropping the portlet name to the dashboard with the mouse OR by clicking Add, located to the right of the portlet name.
6.) Can the same portlet be added to one’s Dashboard more than once?
A: Yes. (See example in question #5); Insert the portlet by either dragging the portlet name to the Dashboard page or by clicking Add, located to the right of the portlet name. “My Pending Proposals” has been duplicated in the example below by dragging the portlet “My Pending Proposals” to the Dashboard page. Most portlets can then be configured using the “Filter” feature (see question #14 for further details).

7.) What does the Edit Controls Option do?
A: The “Edit Controls” option, located in the upper left corner of the main Dashboard page, offers users to either display or hide portlet options used to minimize, maximize or delete a portlet. This is done by clicking the box to the left of “Edit Controls”.

[Images demonstrating the Edit Controls feature and portlet duplication]
My Research Portal displays two portlets that a user may not delete. These portlets include “Action Needed” and “Announcements”.

* Displays important action items one may need to complete (compliance, trainings, etc.)

**Action Needed**

- **Project Closeout Abstract Needs Updating**

* Displays important news and announcements applicable to the user.

**Announcements**

- **Entries**

8.) Can data in portlets be sorted?

A: The data in portlets can be sorted by clicking on the ▼ icon, which is visible when mousing over column headings, and selecting “Ascending”, “Descending” or “Remove Sort”.

![Project Balance](image-url)
When portlets contain a large volume of information, users may scroll through data by clicking directional arrows located in the bottom right corner of the portlet box.

9.) How can one see additional information about a row of data in a portlet?
A: To view supplementary data, click on any hyperlinked text. Additional information will be displayed in a new browser window and/or tab.

10.) Can one drill down into a portal to see more data and change parameters to show additional information?
A: To drill down into a portal, click on More, which is displayed in the top right corner of the portlet “box”. This will link the user to the corresponding system in which detailed information can be viewed.

Once in the system, parameters can be changed by selecting the Criteria Page link. After parameters have been changed, click “Submit” to update results.

Users can print data of a portlet through the browser’s print screen feature. If a user drills down into a portlet’s data, the user can also print detail of the drilled information.
11.) Can a portlet be changed to show data for someone else?

A: Yes. Many of the portlets are configurable to allow one to view data using different parameters. However, the underlying system’s security dictates which filters can be utilized by which portlets. For example, the “Project Portfolio” portlet is initially associated with the logged in user. To change the portlet parameters click on the filter icon.

Next, specify desired parameters and select **Other User**. For the **Employee Name** field, enter the first few characters of the other user’s last name. A list of suggested names displays.

Select the desired name then click on the “**Update**” button. This will refresh the data for the required parameters for the selected individual.

Those portlets which contain “My”, such as “My Effort Distribution by Project” or “Effort on My Funds”, are not able to display information of other individuals. They are specifically applicable to the individual who is logged in to the Dashboard at that point in time. This is a feature of the system’s underlying security.
12.) What is the purpose of a Systems page?
A: The Systems page contains links to various systems which aid in research administration. Users can customize which systems are displayed within this portlet by clicking **Customize**. One can also search for a system by entering key terms within the “Search” term field. The **Show Description/Keywords** button provides additional information for each system.

13.) What is the purpose of a Reports page?
A: The Reports page contains links to reports which assist in managing and tracking sponsored research activity. Users can customize which reports are displayed within the Reports portlet using the **Customize** option. The **Show Description/Keywords** button provides additional information for each report. Any newly added report will be identifiable, as one can see in the “Standalone Portal Reports” example below.

![Standalone Portal Reports Example](image)

**GENERAL**
- Standalone Portal Reports

**SPD**
- Electronic Annual Statement of Reasonableness (eASR)
- Electronic Workload Authorization Form (EWAF)

14.) How can one submit suggestions, comments or questions regarding the Dashboard system?
A: Click on the **Feedback** link, located in the upper right corner of the Dashboard screen. This will allow users to enter an enhancement request for the system, report a bug or submit questions.

![Feedback Link Example](image)

15.) How can one seek self-help regarding use of the Dashboard system?
A: Click on the **Help** link, located in the upper right corner of the Dashboard screen. This will link users to a list of Dashboard terms and functionality descriptions posted within the OSP Research Portal.