What is a portfolio in GMAS?

A portfolio in GMAS is a listing of all pending and active projects where an individual plays a role that grants them access. This access is also what determines which notifications a person receives.

There are a few ways project and role combinations are added to an individual's portfolio:

1. The person is added to a single project's "Administrative team" by a central administrator or department administrator.
2. The person is on a standing team with a role and org assignment that automatically adds them to every "Administrative team" for projects created under the standing team org.
3. A person has reassigned their portfolio assignment to an individual adding them to the "Administrative team" in their place.

How do I navigate to a person's GMAS portfolio?

To navigate to your portfolio in GMAS, you can:

1. Select your name from the global navigation bar at the top of the GMAS homepage, and then select "Portfolio" from the menu options.
2. Select "Portfolio" from the left navigation menu from your person profile page.

To navigate to someone else's portfolio in GMAS, you can

1. Navigate to the individual persons profile page by selecting "People" from the global navigation bar at the top of the GMAS homepage, and then search for the person. From their person profile, select "Portfolio" from the left navigation menu.

How do I update my portfolio in GMAS?

Individauls are only able to update portfolios for themselves. If someone's portfolio needs updating, and they are not able to do it themselves, work with a GMAS Authorized Requestor who can work with Client Services in HUIT to help update their portfolio.

To update your portfolio in GMAS:

1. Navigate to your portfolio page in GMAS (select your name from the global navigation menu at the top of the GMAS homepage, and then select "Portfolio" from the menu options).
2. Select the <Reassign project roles> button.
3. Select the "End date selected portfolio items" option.
   a. You can also reassign from yourself to another person by leaving the "Reassign from" option selected and then searching for the person you wish to transfer project and role combinations to, but to just remove yourself end dating is the best option.

4. Select all of the project and role combinations (it is possible to be on one project in multiple roles, so it will appear once for each role) that you wish to remove yourself from.

   a. WARNING: If you remove yourself from a project and are not on a standing team that grants you access to that project, this action will remove your access to the project completely.

5. Scroll to the bottom of the screen and select <OK>.

If you continue to default onto projects that you do not believe should be in your portfolio after you perform a clean-up, reach out to your GMAS Authorized Requestor or Standing team owner to get your standing team assignments cleaned up. You can view your own standing team assignments from your person profile in the expanded "Teams" panel (the standing team owner and back-up team owner will be listed with the team).

For more information on Standing teams and Administrative teams in GMAS, please visit the GMAS Security Deconstructed job aid on the GMAS website.