Notification preferences

The notification preferences screen in GMAS allow an individual to customize certain GMAS notifications related to their portfolio. Currently, there are only two modules (Digest and Subagreements) that include notifications that can be customized. Over time, GMAS will introduce additional modules. This job aid will be updated as additional items are added.

Prerequisites

This job aid assumes that the reader understands the basic functionality and terminology of GMAS.

Additional resources

- GMAS Daily and Weekly Digest job aid
- How to update a portfolio in GMAS
- <u>Subagreement and Subamendments Job Aid</u>

How to navigate to the Notification preferences screen

To navigate to your notification preferences in GMAS, you can select your name from the global navigation bar at the top of the GMAS homepage, and then select "Notification preferences" from the menu options. You can also select "Notification preferences" from the left navigation menu from your person profile page.

To navigate to someone else's notification preferences in GMAS, you can navigate to the person profile page by selecting "People" from the global navigation bar at the top of the GMAS homepage, and then search for the individual. From their person profile, select "Notification preferences" from the left navigation menu.

Note: inactive HUID profiles (where the "Active in PeopleSoft" flag is **No**) and non-HUID profiles (where the University ID field is blank) will not have this option from the person profile since these person records are not able to receive GMAS notifications.

Updating notification preference

Individuals are only able to update notification preferences for themselves. To update your notification preferences in GMAS:

- 1. Navigate to your notification preferences page in GMAS (see above).
- 2. Select the **Edit** button on the module where notification preferences need to be updated.
- 3. In the modal, use the **On** and **Off** toggles to set the notification preference for the notification types you wish to update and then select the **Save** button.
 - a. If you wish to turn all notifications on or off, use the "All on" or "All off" buttons located at the top of the modal.

Note: Updating a notification preference to **Yes** results in a notification from GMAS being sent to your preferred email address listed on your GMAS person profile screen each time the event occurs on a segment that is present in your portfolio in GMAS. For more information on what is in your portfolio and instructions on how to clean it up, please go to <u>How to update a portfolio in GMAS</u>.

Notifications available to customize

There are currently two modules that include notifications that are customizable in GMAS. These notifications default to **Off** for everyone and can be updated to turn the notification **On**. Opting into notifications at this level means that a GMAS notification will be sent to you each time the related notification is triggered within your portfolio. The two modules available are:

Daily and weekly digest

For more information about these digest notifications that get sent daily and weekly, please visit the <u>GMAS Daily</u> and <u>Weekly Digest job aid</u>.

Subagreement and Subamendments

The notification types that can be turned on or off in the subagreement and subamendments module represent every status transition, status update, and assignment activity that can be taken throughout the subagreement and subamendment workflow. These notifications that you can opt into include:

- Primary status transitions each time a subagreement or subamendment transitions to one of the following primary statuses
 - Under development
 - Central review
 - Ready for drafting
 - o Drafting
 - With subrecipient
 - Partially executed
 - Fully executed
- Secondary status transitions each time a subagreement or subamendment transitions to one of the following secondary statuses
 - o Clarifications requested
 - Indefinite hold
 - o In review
 - In negotiation
 - $\circ \quad \text{Ready for revision} \quad$
- Secondary status updates each time an update is made to one of the above secondary statuses
- Assignments each time an assignment is set or changed
 - o Drafter

- o Central reviewer
- Assignments related to any of the above secondary statuses

For more information about the subagreement workflow, go to the <u>Subagreement and Subamendments Job Aid</u>.