Overview of Segment Homepage

There are four main sections of data on the segment home: navigation pane, key information, dates and dollars, and work in process. The data has been captured in this way to allow users easy navigation, provide less clicks to receive information and highlight upcoming and/or outstanding activities.

Understanding the New Segment Home

Additional Segment Home Job Aids

A - Segment Chooser

This allows users to easily navigate to all associated segments of a project by clicking the drop down arrow next to the segment.

- The Segment Chooser includes the segment number, status of the segment, fund or project ID number, and dates of the segment.
- A drop down will not show if there is only one segment associated with the project
- If there is more than one segment, the project overview will be accessible through the segment chooser.
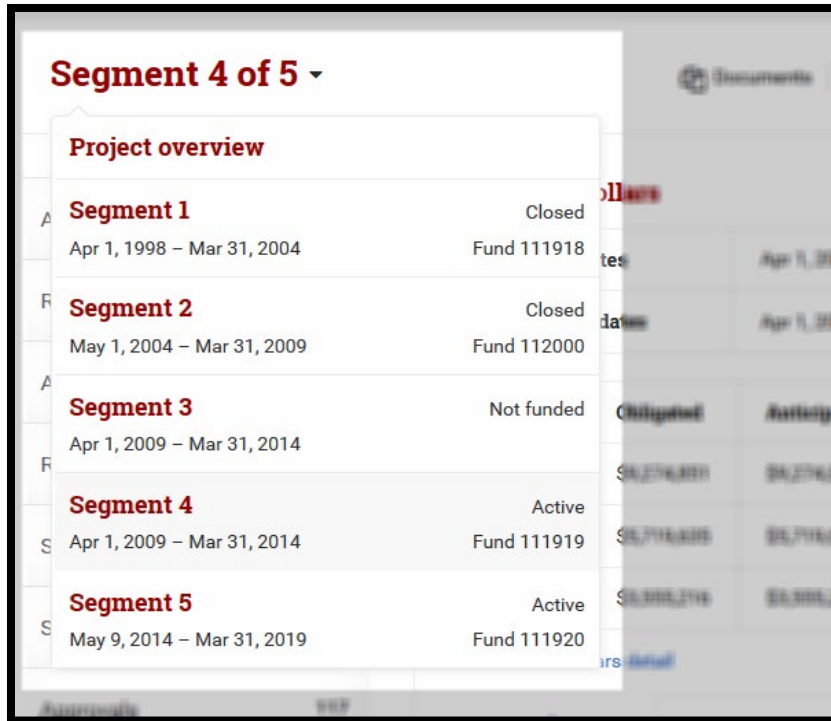
B- More Details

- Within the project snapshot at the top of the screen, there is a blue link to More details (b) capturing segment/ project information that doesn't always need to be displayed on the page.
  - Some information included in this section includes the project ID, tub, organization, project type, discipline, sponsor type, award number, CFDA number, funding instrument, payment method, and agency LOC number.
  - More details section will also include prime sponsor type, prime institute PI and prime award number fields if a prime sponsor has been indicated. This information will also be presented in the closed snapshot.
  - Financial award information and school information are included as links in the more detailed view of the project snapshot.
  - This section also includes nickname, project summary and sponsor edit equipment fields. The nickname and project summary are in place edit fields for those with security, and the sponsor equipment section brings those with security to the edit sponsor equipment terms screen.
    - The in-place edit option under nickname and project summary will only show for users who have security to edit those fields.

- The Sponsor Edit Equipment button will only show in the more detailed view for Central Users with the security to edit the information.

C- Actions

Actions are now located under the project snapshot along with the documents, comments, related links and page info. The drop down actions button includes all of the actions that were previously buttons at the top of the segment homepage.

- Actions include create a request, log a notice, make revision, segment closeout and confirm research team.
- Only the actions a user can take will show in the drop down list. When buttons are disabled it will provide hover text describing why the action cannot be taken at that time (i.e., status of segment or user security).

D - Document Repositories

Document Repositories have been compiled into one location. By clicking on the documents button under the snapshot users will be able to access either the Segment or All Documents repositories.

- The Segment Document repository includes documents related to the segment viewing. This repository belongs to the segment home (previously documents at the bottom of the Segment Homepage).
- The All Documents repository allows users to access all documents in the segment repository including but not limited to request, approval and notice documents (previously segment documents on the right hand side of the screen).
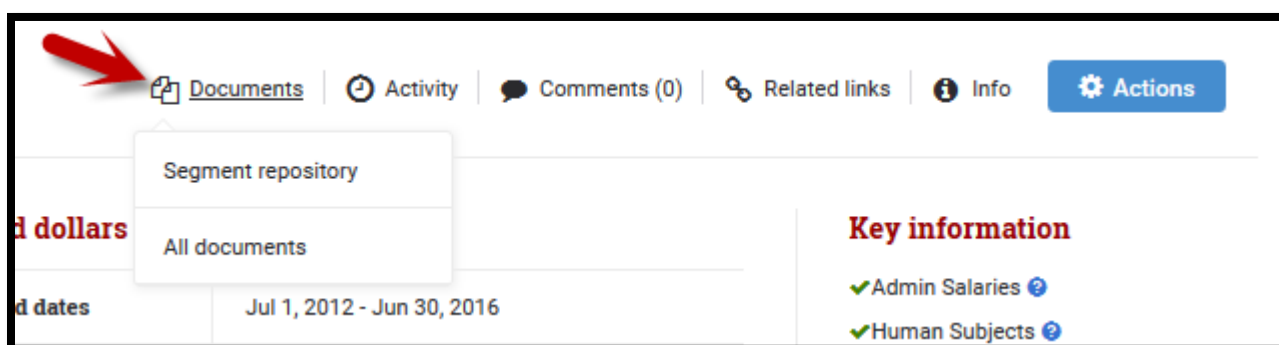
E- Navigation Pane

The navigation Pane is located on the left of the screen providing links to existing GMAS screens. The number next to the page name shows the total number of items associated with the segment.

- The left navigation tags provide links to action memos, requests, accounts, research team, subagreements, sponsor notices, approvals, financial deliverables, non-financial deliverables, receivables, and transaction monitoring.
- Any screen/ tag with a count of "0" will be greyed out (to better highlight those that apply to the segment) but still provide access to the existing page.

Action memos	115
Requests	24
Accounts Edit GL budgets	174
Research team	32
Subagreements	11
Sponsor notices	19
Approvals	106
Financial deliverables	6
Non-financial deliverables	0
Receivables	0
Transaction monitoring	0

F- Dates and Dollars

Dates and Dollars is a summary of relevant financial information including a breakdown of direct and indirect funds as well as total funds. The dates and dollars chart shows obligated, anticipated, expended and balance dollars.

- Dates and dollars details take you to the dates and dollars page.
- Dates and dollars format will vary based on the status of the segment – the obligated dates and dollars chart will only appear for "Active" segments. Pending dollars will show pending dates and dollars.
- If applicable, this section will display cost sharing information when there is a combination of committed cost share and/ or expended cost share.
- At risk accounts will also be highlighted in this section if the account is marked as at-risk. For accounts with many at-risk accounts the dates and dollars section will show

two at risk accounts and provide a link indicating the additional accounts that can be expanded into the view.

Dates and dollars

Obligated dates	Apr 1, 2009 - Mar 31, 2014
Anticipated dates	Apr 1, 2009 - Mar 31, 2014

	Obligated	Anticipated	Expended	Balance
Total	$9,274,851	$9,274,851	$8,740,486	$534,365
Direct	$5,719,635	$5,719,635	$5,513,115	$206,520
Indirect	$3,555,216	$3,555,216	$3,227,371	$327,846

Dates and dollars detail

Cost sharing	Committed: $27,328	Expended: $280,450.75

Key information

✖ Additional staff/space

✖ Administrative salaries

✖ Animals

✖ Biohazards/rDNA

✖ Cost sharing

✖ Harvard is a subrecipient

✖ Human subjects

✖ International

✖ Participant support costs

✖ Stem cells

✖ Use of school name

--- ARRA

--- Agency fund

--- COVID-19

--- Foreign currency

--- Institutional authorities

--- OTD

--- SNAP

--- Small business subcontracting plan

--- Special equipment

--- Uniform guidance

21 do not apply: Hide

G-Key Information

This section surfaces important project attributes to the segment home, so that users can quickly understand the project's risks/ complexities.

- The key information section lists segment flags, approval attribute responses and if Harvard is a sub recipient.
  - Segment flags include yes/ no responses to segment revision questions on uniform guidance, ARRA, institutional authorities, SNAP, foreign currency, agency fund, small business subcontracting plan, and special equipment.
- The segment home will show the items that apply to the segment with a green check mark.
- Users can use the expansion tag at the bottom of the section indicating the number of items that do not apply (i.e., 12 do not apply) to see responses to all questions. Questions answered with a "no" are displayed with an X. Any item with an ellipsis (…) is something that does not apply to the segment.

H-Work in Process

The Work in Process section includes any action that is pending or overdue. This section will show the following:

- Requests that are in process or have been submitted but not yet awarded.
- Overspent and unreconciled accounts, and accounts with invalid code combinations.
- Notices that have not been applied to the segment yet.
- Overdue and upcoming financial and non-financial reports.
- Approvals that are in any status that is considered incomplete.
- Overdue or upcoming receivables.
- Subagreements that are pending, need to be drafted, have pending sub amendments, or need to be extended.
- All of the above work in process sections includes links to their corresponding screens. For more information on this section, refer to the "Overview of Segment Home – Work in Process" Job Aid.

Additional Segment Home Job Aids

Looking for additional information to help you navigate the segment homepage and other changes as a result of the December 14, 2015 release?

- Edit Equipment Process – This job aid documents the new process to edit equipment for a segment in the GMAS system. The edit equipment functionality is used by the business to enter the equipment terms and conditions when the special equipment flag is marked as a yes. As a result of the December system release, only Central Users will have the ability to edit equipment on a segment.
- Overview of Segment Homepage: – The Work in Process job aid takes a deeper look at one section of the segment homepage. The Work in Process section of the segment home provides segment to-do's in one consolidated location. This section is meant to streamline all the items that require attention into one section of the segment homepage
- Top Segment Home Activities – Now that the segment homepage has been redesigned there is an easier way to perform many activities that are performed from the segment home. In other instances there are simply new locations for items. This job aid is relevant to all roles accessing segment home.