

Understanding Segment Home – Work in Process Section

The Work in Process section of the segment home provides segment to-do's in one consolidated location. The Work in Process section is located at the bottom of the screen and may require scrolling to obtain all the actionable items.

This section is meant to bring all the items that require attention (or are in a state of incomplete) into one section on the segment homepage. The Work in Process section will decrease the need to dig for outstanding items and reduce the number of clicks to access and complete actions by bringing them to the front page and providing links that take you directly to that item.

Work In Process Overview

The screenshot displays the Harvard GMAS Segment Home interface. At the top, it shows the segment name "Training Program in Environmental Epidemiology" and various navigation options. The main content area is titled "Segment 4 of 5" and includes a "Data and Action" section with a table of financial data. Below this, a "Work in Process" section is highlighted with a red arrow, containing two sub-sections: "Unreconciled accounts" and "Overdue financial reports".

	Unreconciled	Unreconciled	Unreconciled	Balance
Total	20,412,000	20,412,000	20,412,000	20,412,000
Blank	20,412,000	20,412,000	20,412,000	20,412,000
Balance	20,412,000	20,412,000	20,412,000	20,412,000

Unreconciled accounts

Subactivity 278001.3202 Part-of - TRE Y22	Overspent by \$403.03
Subactivity 278001.3301 Main - Main Y22	Overspent by \$38,180.76
Subactivity 278001.3302 Part-of - TRE 22	Overspent by \$17,578.25

Overdue financial reports

FR-SF425 - Federal Financial Report Preparer: Central Financial Administrator	Due 420 days ago on Sep 29, 2014
FR-SF425 - Federal Financial Report Preparer: Central Financial Administrator	Due 55 days ago on Sep 29, 2015

Each segment homepage will only show the panels that have outstanding and/or upcoming activities. Each panel is indicated with black bold heading – where there are overdue activities or activities requiring more immediate attention the panel heading will include a red triangle with an exclamation point. The order begins with open revisions and overdue items and then shows upcoming items due.

Note: Users may need to scroll in order to see all the work in process panels/items.

Work In Process Panels

Accounts

- **Overspent Accounts** – shows accounts where the total expenses are greater than the total allocated amount.
 - The panel will display the activity, subactivity, amount overspent and a link to the account home.
 - At-risk accounts are excluded from this panel but can be found in the dates and dollars section of the segment homepage

⚠ Overspent accounts	
Subactivity 262350.2209 Part-of - Krishna Reddy Y22	Overspent by \$1,375.52 \$17,194 allocated
Subactivity 262350.2302 Part-of - TRE Y23	Overspent by \$15,280 \$7,560 allocated

- **Unreconciled Accounts** – shows accounts where the final figure has been entered, the total expenses do not match the final figure, and the account is active.
 - The panel will display the activity, subactivity, account description, amount overspent or underspent, and a link to the account home.

⚠ Unreconciled accounts	
Subactivity 278001.3202 Part-of - TRE Y32	Overspent by \$403.03
Subactivity 278001.3301 Main - Main Y33	Overspent by \$38,180.76
Subactivity 278001.3302 Part-of - TRE 33	Overspent by \$17,578.25

- **Invalid Code Combination** – appears if there are invalid code strings appearing on the dates and dollars page for the segment.

- An invalid code combination is one that uses the fund or activity/subactivity from a sponsored account, but the corresponding fund or activity/subactivity from a *different* sponsored account. Invalid transactions are based on fund/activity/subactivity ONLY (no other chart segments). Segments only show invalid codes when the sum of transactions to an individual object code is not zero (since invalid codes can only be "removed" from an account by creating offset transactions to the same string).
- The panel will display that there are invalid code combinations and will provide a link to the dates and dollars details page.

⚠ Invalid code combinations [?](#)

This project has invalid code combinations on 2 accounts.

Approvals

- **Needed Approvals** – shows approvals in statuses considered “Needed”.
 - The panel will display the type of approval, status and if applicable the person required to provide the review/approval.

Needed approvals

Federal debarment: Brigham and Women's Hospital, Inc	Needed
International collaboration and activities	Incomplete

Notices

- **Unapplied notices** – any notice on the segment that has not been applied yet (has a status of ‘Under Review’ or ‘Reviewed’).
 - Each notice will provide the notice issued date, status, request type the notice is associated to if applicable, and link to the notice home.

Unapplied notices

<p>Notice issued Aug 1, 2015</p> <p>At Risk account(s)</p>	Under Review
<p>Notice issued Aug 12, 2015</p> <p>Continuation</p>	Under Review

Financial and Non-Financial Reports

- **Upcoming/due financial reports** – displays segment financial reports that are due within the next 30 days.
 - Each report will show the report type, due date, and preparer role.

- Each report will link to the editable financial report if the user has the required security. For those without security only the text will show.

Upcoming/due financial reports ?

R- Review Preparer: Central Financial Administrator	Due in 10 days on Nov 30, 2015
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- **Upcoming/due non-financial reports** – displays segment non-financial reports that are due within the next 30 days.
 - Each report will show the report type, due date, and preparer role.
 - Each report will link to the editable non-financial report if the user has the required security. For those without security only the text will show.

Upcoming/due non-financial reports ?

Invention Statement Preparer: Department Administrator	Due in 5 days on Nov 30, 2015
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- **Overdue financial reports** – shows any financial report on the segment where the completed date has not been entered AND the due date is prior to today’s date.
 - Each report will show the report type, due date, and preparer role.
 - Each report will link to the editable financial report if the user has the required security. For those without security only the text will show.

Overdue financial reports ?

R- Review Preparer: Central Financial Administrator	Due 24 days ago on Nov 1, 2015
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- **Overdue non-financial reports** – shows any non-financial report on the segment where the completed date has not been entered AND the due date is prior to today’s date.
 - Each report will show the report type, due date, and preparer role.
 - Each report will link to the editable non-financial report if the user has the required security. For those without security only the text will show.

Overdue non-financial reports ?

ARRA Sub Not Delegated Preparer: Conflict of Interest Administrator	Due 3,975 days ago on Jan 1, 2005
ARRA Sub Not Delegated Preparer: Central Administrator	Due 3,975 days ago on Jan 1, 2005

Receivables

- **Upcoming receivables** – displays receivables expected in the next 30 days.
 - Displays the payment method, amount due, and receivable due date.
 - The payment method is a link to goes to the Edit Receivable screen. Users will only be able to access this link if they have the required security.

Upcoming receivables ⓘ

Check for \$5,000	Expected in 5 days on Nov 30, 2015
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- **Overdue receivables** – displays receivables that are overdue.
 - Displays the payment method, amount due and receivable due date.
 - The payment method is a link to goes to the Edit Receivable screen. Users will only be able to access this link if they have the required security.

⚠ Overdue receivables ⓘ

Check for \$120,000	Expected 679 days ago on Jan 10, 2014
Check for \$57,657,576	Expected 415 days ago on Oct 1, 2014
ACH for \$12,000	Expected 406 days ago on Oct 10, 2014
EFT for \$6,666	Expected 406 days ago on Oct 10, 2014
EFT for \$45,645	Expected 406 days ago on Oct 10, 2014

Requests

- **Requests in process** – displays all requests that have not been submitted including requests with the following status: 'Incomplete', 'Under Development', 'Under Internal Review', and 'Authorized'.
 - Each request will show the request name and request type. The request type will match what is shown on the request list and request home.
 - Each request will link to that request home.

Requests in process

New account(s) - 5901235 Under development

- **Submitted requests (not awarded)** – shows any request associated to the segment that has a status of "Submitted to Sponsor".
 - Prior version requests will not be displayed in this panel.

- Just-in-time requests that have a “Submitted to sponsor” status will not be displayed in this panel.
- Each request will show the name of the submitted request and date submitted. The request type will match what is shown on the request list and request home.
- Each request will link to that request home.

Submitted requests	
Continuation - 5864128	Submitted 598 days ago on Apr 1, 2014
Subagreement addition at no additional cost - 5902628	Submitted 323 days ago on Jan 1, 2015
Continuation - 5864134	Submitted 269 days ago on Feb 24, 2015

Revisions

- **Open segment revisions** – shows if there is an uncommitted revision for the segment along with a link to the revision homepage. The “Continue making changes” action button takes users to the Revision home.
 - The panel will display the user who initiated the revision, what day it was initiated on, and will have a button to access the open revision. This button will only show to users who have the appropriate access. The button shows as disabled when another user is in the revision along with a tool tip stating so.

Open revisions ?	
Initiated on Oct 14, 2015 by Nancy DiNicolo	Continue making changes

Subagreements

- **Pending subagreements** – displays a subagreement with a ‘Pending sponsor approval’ status and with an associated request that is awarded.
 - Each subagreement will show the subagreement organization’s full name, subagreement ID, status of the subagreement, proposed start date, and a link to the subagreement home.

Pending subagreements ?	
Dana-Farber Cancer Institute - 5089993	Pending Sponsor Approval Proposed start Jul 1, 2015

- **Subagreements to be drafted** – displays a subagreement with a ‘Sponsor Approved’ or ‘Subagreement Pending’ status and where funds have been held aside in anticipation of subagreement being drafted.

- Each subagreement will show the subagreement organization’s full name, subagreement ID, status of the subagreement, proposed start date, and a link to the subagreement home.

Subagreements to be drafted ?

Dana-Farber Cancer Institute - 5089993	Sponsor Approved, Sub Pending Proposed start Jul 1, 2015
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- **Pending subagreement amendments** – shows any subagreement with an amendment drafted in a status of ‘Under Review’ or ‘Duly Executed’.
 - Each subagreement will show the subagreement organization’s full name, subagreement ID, subagreement description if applicable, status of the subagreement, and a link to the subagreement amendment being drafted.

Pending subagreement amendments

Andrew W. Mellon Foundation - 5096113-00	Under review
Brigham and Women's Hospital, Inc - 5057295-03 BWH	Under review

- **Subagreements that need extending** – displays any subagreement on that segment that has an issued end date less than 30 days from the current date and the issued date is less than the anticipated end date
 - Each subagreement will show the subagreement organization’s full name, subagreement ID, subagreement description if applicable, status of the subagreement, and a link to the subagreement home.

Subagreements that need extending

Dana-Farber Cancer Institute - 5089993 Dana-Farber	Ended 25 days ago on Oct 31, 2015 Anticipated through Jun 30, 2020
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General Ledger (GL) Budgets

- **Failed GL budget posting**– displays budgets which were sent to the GL from GMAS but failed to process because of an issue with the cross validation rule (CVR) on the account string.
 - The panel will display the activity and subactivity numbers, the account type and description, and the date the transaction failed to upload to the GL.
 - The ‘Edit GL budget’ button shows as disabled (with a tool tip explaining why) when another user is editing the budget or if they don’t have access to edit the budget.

▲ Failed GL budget posting

Subactivity 383266.0001
Main - Main

Edit GL budget

GL posting failed on Nov 29, 2016

- **Accounts needing GL budget updates** – displays budgets where the allocated amount does not equal the GL budget amount for that account.
 - The panel will display the activity and subactivity numbers, the account type and description, and the amount remaining to be budgeted. The button shows as disabled (with a tool tip explaining why) when another user is editing the budget or if they don't have access to edit the budget.
 - A negative “remaining to be budgeted” amount indicates the allocated is greater than the budgeted amount.

Accounts needing GL budget updates

Subactivity 274820.0001
Main - Main

Edit GL budget

(\$2,348) remaining to be budgeted

Additional Segment Home Job Aids

- **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** – This job aid provides an overview of the new segment homepage layout and orients users to new locations of information. There are four main sections of data on the re-designed segment home: Navigation pane, Key Information, Dates and Dollars, and Work in Process. This job aid provides details around these four main sections.
- **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.