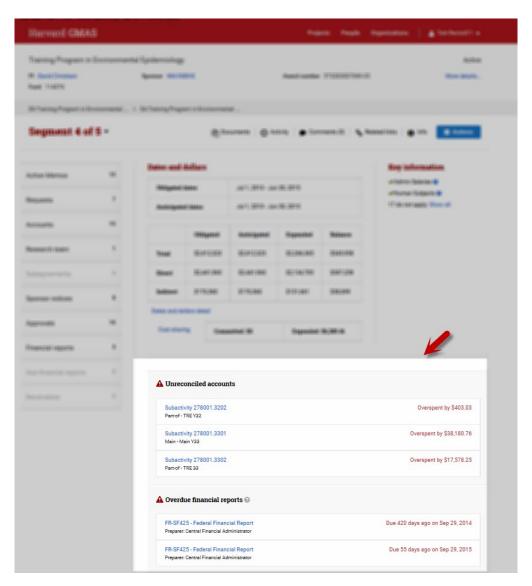
Understanding Segment Home - Work in Process Section

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



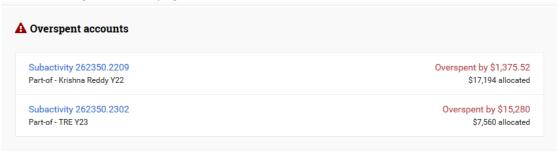
Each segment homepage will only show the panels that have outstanding and/or upcoming activities. Each panel is indicated with black bold heading – where there are overdue activities or activities requiring more immediate attention the panel heading will include a red triangle with an exclamation point.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

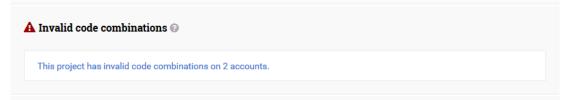


- Unreconciled Accounts shows accounts where the final figure has been entered, the total expenses do
 not match the final figure, and the account is active.
 - The panel will display the activity, subactivity, account description, amount overspent or underspent, and a link to the account home.



• **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.



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.



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.



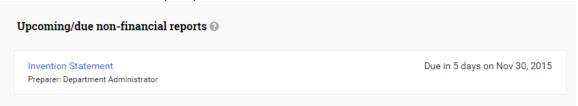
Financial and Non-Financial Reports

- Upcoming/due financial reports displays segment financial reports that are due within the next 30 days.
 - o 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 non-financial reports** displays segment non-financial reports that are due within the next 30 days.
 - o 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 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 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.
 - o 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.

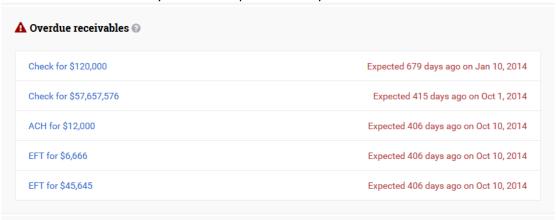


Receivables

- **Upcoming receivables –** displays receivables expected in the next 30 days.
 - O 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 displays receivables that are overdue.
 - O 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.



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.
 - o Each request will link to that request home.



- **Submitted requests (not awarded)** shows any request associated to the segment that has a status of "Submitted to Sponsor".
 - o 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.



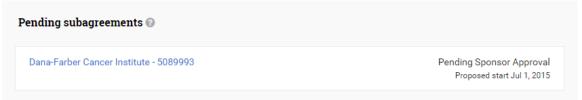
Revisions

- 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.



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.



• **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.

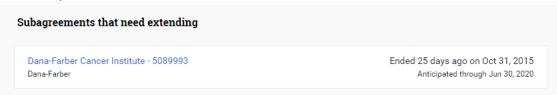
 Each subagreement will show the subagreement organization's full name, subagreement ID, status of the subagreement, proposed start date, and a link to the subagreement home.



- 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.



- 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.



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.

Overview of Segment Home - Work in Process

User Role(s): All Last Updated: 3/16/2022

♣ Failed GL budget posting
Subactivity 383266.0001
Main - Main
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.



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 redesigned 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.