SUMMIT Training

University of Massachusetts Medical School
Worcester Campus

Reference Guide
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# Summit Overview Job Aid

## What is Summit?

The UMass SUMMIT Program is a partnership with the business community to coordinate and manage the Enterprise Reporting efforts at the University.

SUMMIT is a business intelligence and report inquiry tool that will transform volumes of data into valuable, actionable information. Summit incorporates leading practices and tools widely accepted in the industry for the summarization and presentation of data.

## What are Dashboards?

Dashboards are intended to provide decision-makers with an understanding of relevant data in support of the business operations. It tracks key performance indicators and provides warnings, action alerts and next steps when areas of the business fail to meet pre-determined metrics.

An effective Dashboard is integrated with visual analytics to provide a single tool for rapid, insightful decision making.

## What are Widgets?

Widgets are presentations of data within a Dashboard. Data within a widget may be presented as an alert, in graphical and/or table format. Widgets can be customized based upon the business question it is intended to answer. Widgets can present data in multiple views i.e. pie graph, bar graph or line graph...

## Logging into Summit

1. Navigate to the intranet ([http://inside.umassmed.edu](http://inside.umassmed.edu)).
2. Click Financial Services then click Summit from the left navigation bar.
3. Click SUMMIT Sign on to access the login screen. ([https://appsprdsummit-inside.umassadmin.net/analytics/](https://appsprdsummit-inside.umassadmin.net/analytics/))
4. Enter your User ID and Password.
5. Click the Log In button.

*Note:* User ID and Password are the same as PeopleSoft Finance.
Upon Logging into SUMMIT the Academic Administrator view displays.

The Academic Administrator view contains seven pages displayed in the graphic below.
<table>
<thead>
<tr>
<th>Page</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary</td>
<td>Displays summarized financial information for a high level department or individual department value.</td>
</tr>
<tr>
<td>Sponsored Activity</td>
<td>Displays information for sponsored projects. Users can navigate to this page by:</td>
</tr>
<tr>
<td></td>
<td>• Drilling from the Summary page. (In this option the filter criteria will automatically be populated.)</td>
</tr>
<tr>
<td></td>
<td>• Directly navigating to the page and manually entering the filter criteria.</td>
</tr>
<tr>
<td>Fund Balance Activity</td>
<td>Displays information for fund balance based chartstrings. Typically, those where cash/fund balances are retained by the department and carried forward from year to year (i.e. Dept RTF &amp; revenue based).</td>
</tr>
<tr>
<td></td>
<td>• Drilling from the Summary page. (In this option the filter criteria will automatically populate.)</td>
</tr>
<tr>
<td></td>
<td>• Directly navigating to the page and manually entering the filter criteria.</td>
</tr>
<tr>
<td></td>
<td>(See Appendix A for a listing of funds defined as fund balance)</td>
</tr>
<tr>
<td>Budget Balance Activity</td>
<td>Displays information for those chartstrings that receive an annual budget allocation (i.e base allocations and administrative departments). Users can navigate to this page by:</td>
</tr>
<tr>
<td></td>
<td>• Drilling from the Summary page. (In this option the filter criteria will automatically populate.)</td>
</tr>
<tr>
<td></td>
<td>• Directly navigating to the page and manually entering the filter criteria.</td>
</tr>
<tr>
<td></td>
<td>(See Appendix B for a listing of funds defined as budget balance)</td>
</tr>
<tr>
<td>Non Sponsored Activity</td>
<td>Displays detailed information for non-sponsored projects (i.e gift and recruit packages). Users can navigate to this page by:</td>
</tr>
<tr>
<td></td>
<td>• Drilling from the Summary page. (In this option the filter criteria will automatically be populated.)</td>
</tr>
<tr>
<td></td>
<td>• Directly navigating to the page and manually entering the filter criteria.</td>
</tr>
<tr>
<td>Transaction Detail</td>
<td>Displays detailed transaction information for a selected time frame, this page will display transactions for revenue, expenses, budget and encumbrances. Time frame is user determined and can cross fiscal years and months. Users can navigate to this page by:</td>
</tr>
<tr>
<td></td>
<td>• Directly navigating to the page and manually entering the filter criteria.</td>
</tr>
<tr>
<td>Demographic</td>
<td>Demographics tab at the top of the dashboard. Displays non financial information for sponsored and non sponsored funding, including SPEEDTYPE. You have the ability to filter by Node and/or Department.</td>
</tr>
</tbody>
</table>
Prompts/Filters Each page has a different filter criterion which allows you to modify your search criteria to display all results, you will have to set values to blank or set drop down filters to All Choices. Once you set your criteria, you must click the Go button to return the data.

Note: Every time you change your criteria, you must click Go.

Saving Filter Values Users can save filter values to speed the display of information commonly used. A default setting allows saved filter prompts to return when that page is selected. Before saving a default filter be sure you have clicked Go.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click the Page Options tab.</td>
</tr>
<tr>
<td></td>
<td>[Image of Page Options tab with options: Edit Dashboard, Apply Saved Selections, Save Current Selections, Clear My Selections, Create Bookmark Link]</td>
</tr>
<tr>
<td>2</td>
<td>Select the Save Current Selections option the select For Me.</td>
</tr>
<tr>
<td></td>
<td>[Image of Page Options tab with Save Current Selections highlighted]</td>
</tr>
<tr>
<td></td>
<td>Result: The Save Current Selections window will open and present the Name for the saved selection. You may overwrite this description or leave the default description.</td>
</tr>
<tr>
<td>3</td>
<td>Enter in the name of your Current Selection then click OK.</td>
</tr>
<tr>
<td></td>
<td>[Image of Save Current Selections window with name field and OK button]</td>
</tr>
<tr>
<td>4</td>
<td>Click the Make this my default for this page if you want to set this selection as the default filter set for this page.</td>
</tr>
</tbody>
</table>
## Using Saved Selections

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click the <strong>Page Options</strong> then click <strong>Apply Saved Selections</strong>.</td>
</tr>
</tbody>
</table>
| 2    | Select the appropriate Saved Selection  
*Note:* Select the saved filter selection to apply to the dashboard. If you have set a default for this page, it will appear in bold. |

## Clear My Selections

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click the <strong>Page Options</strong> tab.</td>
</tr>
</tbody>
</table>
| 2    | Select the **Clear My Selections**.  
*Result:* The page will refresh and all filters will be reset to All Choices |

## Printing Widgets

At the bottom of each widget is a set of links that allow printing, downloading or refreshing of data in each section.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Click the **Print** link at the bottom of a widget.  
*Result:* A sub menu displays with two options print to PDF or HTML view. |
| 2    | Select either **PDF** or **HTML**  
*Note:*  
- HTML option will open a new window that can be printed (using the print function of the browser) with the content of the widget  
- PDF option will open a new window that displays the PDF file inside your browser. You can print or save the file for your records. |
In a table display of data, if there are more than 10 rows on the Summary page and 25 rows on a detail page, there will be navigation arrows to retrieve additional data.

- To navigate to the next set of records, click on the right arrow.
- To display all records, click the right arrow with asterisk button.
- To navigate back one set of records, click on the left arrow.
- To navigate to the beginning of the results set, click the left arrow with the vertical line button.

### Download to Excel/PDF/Powerpoint

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Scroll to the bottom of each widget to display a set of three links.</td>
</tr>
<tr>
<td>2</td>
<td>Click the Download link to display a list of download choices.</td>
</tr>
</tbody>
</table>
| 3    | Select download to Excel...  
**Note:** When downloading to Excel, you will receive a window that asks if you want to open or save the requested file.  
| 4    | Click **Save** if you want to save the file to your computer as a Microsoft Excel Workbook file.  
**Note:** The filename will be the “widget title name”.xls (e.g., Project Summary.xls). Please make note of the directory where the file is saved.  
| 5    | Confirm the **Save In:** directory, then click **Save**.  
**Note:** You must change the Save as type to Excel Workbook (*.xls) to open in Excel.
Summary Page

**Page Filters/Prompts** – Allows the users to choose filter criteria for the page.

**Alerts** – Displays summarized financial data for sponsored projects in jeopardy of being over or underspent. *Alerts are based upon the user’s row level security and today’s date.*

**Shortcuts** – Contains links to common URLs.

**Sponsored Lowest Budget Remaining Balance – Direct Expenditures** – Displays the five projects with the lowest remaining direct budget balance. *Days remaining are based on current date.*

**Sponsored Projects Set to Expired**
Displays a chart of sponsored projects set to expire grouped by days remaining.

**Sponsored Projects Expired**
– Displays a table of expired sponsored projects, grouped by days expired.

**Sponsored Project Summary**
Displays a table of summarized financial data for sponsored projects.

**Inactive Projects- Sponsored Projects Summary with Current Fiscal Year Activity**
Provides access to Inactive sponsored projects with current fiscal year activity.

**All Projects- Sponsored Projects Summary (Active and Inactive)**
Provides access to all Sponsored projects both active and inactive.
Fiscal Year Fund Balance Summary - Displays a table of summarized financial data for those funds defined as fund balance. These include Funds where the balance is brought forward each fiscal year. (See appendix A for a listing of funds defined as fund balance.)

Fiscal Year Budget Balance Summary - Displays a table of summarized financial data for those funds defined as budget balance. These include funds where the balance is not brought forward each fiscal year. (See appendix B for a listing of funds defined as budget balance.)

Non-Sponsored Project Summary - Displays a table of summarized financial data for non-sponsored projects.

Inactive Projects - Sponsored Projects Summary with Current Fiscal Year Activity
Provides access to Inactive Non-Sponsored projects with current fiscal year activity.

All Projects - Sponsored Projects Summary (Active and Inactive)
Provides access to all Non-Sponsored projects both active and inactive.
**Sponsored Activity Page**

Information – Provides pertinent information for the selected sponsored project. Speedtype is displayed here.

Key Personnel
Displays the key personnel for the project as well as the % of committed effort for Key Personnel.

Project to Date Expenditure by Category
Displays project to data balances for: payroll, non-payroll, and fringe expenses.

Sponsored Non Personnel Trend (rolling 6 months) – Displays non-personnel expenses by month grouped by expense categories.

Sponsored Direct Expenditure Trend (rolling 6 months) & Sponsored Direct Encumbrance Trend (rolling 6 months) - Displays monthly direct expenditure or encumbrance balances, with an average trend line. This graph will display a rolling 6 months based upon the time span in the filter criteria.

Sponsored Activity Expense Summary – Displays Summarized Financial Data for the selected sponsored project. Clicking on the account description will display account level information.

Sponsored Project Expenditure by Month

Payroll Detail by Employee
Displays detailed employee payroll information.

Clinical Payroll Detail by Employee
Displays month, year and project to date employee payroll expenses for cross funded employees, (paid from clinical payroll but funded through the school).
### Fund Balance Activity Page

**Average Non Personnel Expense Per Month (rolling 12 month)**
Displays non-personnel expenses by month.

**Fiscal Year Fund Balance Revenue and Expense Summary**
Displays summarized financial data for the selected department and fund combination. Clicking on the Account description displays account level information.

**Payroll Detail by Employee**
Displays detailed employee payroll information.

**Clinical Payroll Detail by Employee**
Displays month, year and project to date employee payroll expenses for cross funded employees, (paid from clinical payroll but funded through the school).

**Procad Detail**
Provides period to date Procad detail by card holder.

---

#### Fiscal Year Fund Balance Summary

<table>
<thead>
<tr>
<th>DeptID</th>
<th>Fund</th>
<th>Program</th>
<th>Fiscal Year Revenue</th>
<th>Fiscal Year Additions</th>
<th>Fiscal Year Expenditures</th>
<th>Fiscal Year Deductions</th>
<th>Net Change</th>
<th>Ending Balance</th>
<th>Encumbrance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>W 52132 - THON0000001-RTY - Surgery-Dept/Gal(transfer)</td>
<td></td>
<td>2,245.85</td>
<td>0.00</td>
<td>4,492.36</td>
<td>8.00</td>
<td>-10,722.70</td>
<td>15,807.70</td>
<td>8.00</td>
</tr>
</tbody>
</table>

---

#### Procad Detail - Period to Date

No data found for the filter criteria.

---

**Return To Summary**
Average Non Personnel Expense Per Month (rolling 12 month)
Displays non-personnel expenses by month.

Fiscal Year Fund Balance Revenue and Expense Summary
Displays summarized financial data for the selected department and fund combination. Clicking on the Account description displays account level information.

Payroll Detail by Employee
Displays detailed employee payroll information.

Clinical Payroll Detail by Employee
Displays month, year and project to date employee payroll expenses for cross funded employees, (paid from clinical payroll but funded through the school).

Procard Detail
Provides period to date Procard detail by card holder.
### Average Non Personnel Expense Per Month (rolling 12 month)
Displays non-personnel expenses by month.

### Fiscal Year Fund Balance Revenue and Expense Summary
Displays summarized financial data for the selected department and fund combination. Clicking on the Account description displays account level information.

### Payroll Detail by Employee
Displays detailed employee payroll information.

### Clinical Payroll Detail by Employee
Displays month, year and project to date employee payroll expenses for cross funded employees, (paid from clinical payroll but funded through the school).

### Procard Detail
Provides period to date Procard detail by card holder.
### Expenses (HR Payroll)
Includes those payroll and fringe benefit expenses that flow through the payroll system. This will not include fringes booked via general ledger allocations such as workers comp, health & welfare, and fringes on state payroll. These will display under the Expenses and Transfers Out (Other Sources) category.

### Expenses (Accounts Payable, Procard)
Includes expenses generated via a requisition or purchase order, and Procard expenses.

### Expenses and Transfers Out (Other Sources)
Includes expenses generated from sources other than HR and AP, for example; general accounting entries, recharges, clinical payroll entries, transfers, and F&A expenses.

### Revenue and Transfers In
Includes all revenue and transfers in from all sources.

### Budget
Includes all budget entries from all sources.

### Encumbrance Payroll
Includes payroll and fringe benefit encumbrances that flow through the payroll system. This will not include any state fringe encumbrances, these are done via General Ledger allocations and will display under the Expenses and Transfers Out (Other Sources) category.

#### Open Encumbrance (Purchase Order)
Purchase order encumbrance balances by PO number, vendor and chartstring for the selected time span. To view the full balance on the PO, select the beginning of the Fiscal Year in the From Period filter.

#### Open Encumbrance (Requisitions)
Requisition pre-encumbrance balances by Req ID, vendor and chartstring for the selected time span. To view
the full balance on the requisition, select the beginning of the Fiscal Year in the From Period filter select the beginning of the Fiscal Year in the From Period filter
### Demographics – Sponsored Projects
Displays chartfield information including speedtype for all sponsored projects.

### Demographics – Fund Balance, Budget Balance and Non-Sponsored Projects.
Displays chartfield information for all Fund, Budget and Non-Sponsored Projects.

#### Demographics – Sponsored Projects
<table>
<thead>
<tr>
<th>Project ID</th>
<th>Project Description</th>
<th>Sponsor</th>
<th>Dept Award Id</th>
<th>Project Period</th>
<th>PI Name</th>
<th>Award/Contract</th>
<th>F&amp;A Rate</th>
<th>Fund Code</th>
<th>Fund Description</th>
<th>DeptID</th>
<th>DeptID Description</th>
<th>Program Code</th>
<th>Speedtype</th>
</tr>
</thead>
<tbody>
<tr>
<td>S025501520800000</td>
<td>3M/NIH Study (S2)</td>
<td>3M/NIH Innovative Properties Company</td>
<td>91695</td>
<td>20-DEC-08 to 15-DEC-08</td>
<td>Pfeiffer</td>
<td>VCU 2000000000543</td>
<td>26.89%</td>
<td>0342</td>
<td>Private Direct G&amp;A Level 2</td>
<td>U1</td>
<td>U1</td>
<td>814</td>
<td>117264</td>
</tr>
</tbody>
</table>

#### Demographics – Fund Balance, Budget Balance and Non-Sponsored Projects
<table>
<thead>
<tr>
<th>Project ID</th>
<th>Project Description</th>
<th>Fund Code</th>
<th>Fund Description</th>
<th>DeptID</th>
<th>DeptID Description</th>
<th>Program Code</th>
<th>Speedtype</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
<td>N/A</td>
<td>51498</td>
<td>HSF, Departmental</td>
<td>B01</td>
<td>112072</td>
<td></td>
<td></td>
</tr>
<tr>
<td>N/A</td>
<td>N/A</td>
<td>53000</td>
<td>Private Gifts</td>
<td>D04</td>
<td>N/A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>P300000400000000</td>
<td>SFF Injury Free Work</td>
<td>53000</td>
<td>Private Gifts</td>
<td>D04</td>
<td>100000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>P300000400000000</td>
<td>SFF Injury Free Work</td>
<td>53000</td>
<td>Private Gifts</td>
<td>D04</td>
<td>100000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>P300000400000000</td>
<td>Puller Foundation</td>
<td>53000</td>
<td>Restricted Endowment Income</td>
<td>D04</td>
<td>113012</td>
<td></td>
<td></td>
</tr>
<tr>
<td>R677000000120951</td>
<td>RG Injury Prevention/Educ Fund</td>
<td>53000</td>
<td>Private Gifts</td>
<td>D04</td>
<td>115644</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>