University of Massachusetts Medical School
UMASS

Summit Dashboard

Overview

The Summit Dashboard facilitates managing staff and their compensation for Department Managers, Department Administrators and/or Campus HR Departments. It contains multiple pages, each with one or more reports. The Summit Dashboard is designed with meeting the targeted needs of the user groups in mind. The Summit Dashboard organizes all the financial data into two dashboards, **Confidential** and **Non Confidential**. The reports within the dashboards are organized **by Life Event categories** that include **Hiring, Paying, Managing, Terminating and Position Management.** The reports provide you detailed financial information for the employees that report to you organized by Life Event categories. This design allows us to provide you better views to your employee financial data that meets your custom needs.

Users of this dashboard must have security granted through PeopleSoft and/or be a supervisor with direct reports. There are three types of security in effect on this dashboard:
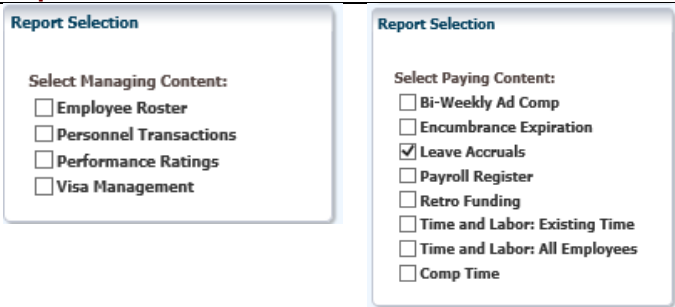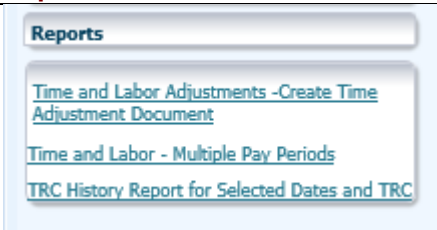
- PeopleSoft HR Department Security
- PeopleSoft Time and Labor Security which is only in effect for MSAT confirming of time, Time and Labor reports and Leave Accrual reports.
- Management Hierarchy based on either Supervisor ID or Reports To Position #. **Note:** If this is the only security, you have when an employee terminates or transfers, you will lose access to all of their data.

You will not have access to all the reports. Your custom view and access will be based on your targeted user needs. If reports are not showing the employees you expected, please consult with your SUMMIT HCM Campus Lead to review your data security. They manage your security profile and can make any necessary corrections to it.

This dashboard contains the following pages:

- **Hiring:** Reports of hiring activity for a specified time frame.
- **Paying:** All reports related to paying an employee. **(Confidential Reports Only)**
- **Managing:** All reports related to managing an employee.
- **Terminating:** Reports of terminating activity for a specified time frame.
- **Position Management:** Reports related to filled and vacant positions. **(Confidential Reports Only)**

Summit Dashboard

The Summit Dashboard documents will provide details on the content by page. All pages have some common elements with minor variations. Below are examples of some of the most common prompts with descriptions.

Prompting

Prompting Start Date 03/04/2018 12:00:00 End Date 03/17/2018 12:00:00 Manager Streeter,Martha S - 10157135 Reporting Group Direct Reports HR Dept (All Column Values) * Employee (All Column Values) Organization Relationship (All Column Values) Jobcode (All Column Values) Employee Classification (All Column Values) Apply Reset	• **Prompts** can vary by page but these are the most common prompt values used in SUMMIT. **Dates:** Most pages default to the last closed pay period. Others like the prompt on the left default to beginning and ending of 1 or more pay period. **Manager:** If you are a manager this will default to you. Otherwise select 'All Choices' from the drop down. **Reporting Group**: When a manager is selected choose either 'Direct Reports', default, or 'All Reports'. **HR Department**: Select 1 or more departments. Remember to pay attention to the Manager Selection. **Employee:** Select one or more employees. **Organization Relationship**: Employee or Contingent. **Jobcode:** Provides a menu of all job codes for you to choose. **Employee Classification:** Provides a menu of all employee classifications for you to choose.

Report Selection

Report Selection Select Managing Content: ☐ Employee Roster ☐ Personnel Transactions ☐ Performance Ratings ☐ Visa Management **Report Selection** Select Paying Content: ☐ Bi-Weekly Ad Comp ☐ Encumbrance Expiration ☑ Leave Accruals ☐ Payroll Register ☐ Retro Funding ☐ Time and Labor: Existing Time ☐ Time and Labor: All Employees ☐ Comp Time	• Some dashboard pages include a **report selection prompt.** • Select the desired report(s) by clicking the box to the left of the report name. • The report(s) will appear in the column on the right. • The report selector prevents unneeded reports from running. • Some reports like Visa Management may not have results because no employees are working under a visa. In that case, the report will diplay a No Results message.

Reports

Reports Time and Labor Adjustments -Create Time Adjustment Document Time and Labor - Multiple Pay Periods TRC History Report for Selected Dates and TRC	• This section identifies **other related reports**. Typically these reports are accessed occasionally and may meet a specific alternate function. • On pages with report selectors, the reports that appear in this section are based on the Report Selection in the prompt above.