SUMMIT Fiscal Management of Sponsored Programs

How to use the SUMMIT Reporting Tool to effectively manage your sponsored funding

Office of Research & Sponsored Programs (ORSP)

Topics:

SUMMIT Basics

Access, Logging In, Navigation, Summary Page

Sponsored Activity Page

Prompts, Encumbrances, F&A, Reporting

Resources

Ongoing training and how to get help

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SUMMIT – The Basics

What is SUMMIT?

SUMMIT is the enterprise reporting tool for the UMass system

SUMMIT delivers PeopleSoft data quickly and easily

…if you know how to use it effectively

What do I need to know?

SUMMIT is not dynamic

It is updated nightly through a data feed from PeopleSoft

Beware the Dunning-Kruger effect!

It is important to truly understand your data in SUMMIT

Utilize your resources – Departmental and ORSP

Your support staff are well versed in institutional policy and process as well as how to navigate the complex compliance concerns that are associated with sponsored programs.

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SUMMIT – The Basics

How do I get access?

- As a PI, you should automatically have access to SUMMIT
  - Use your regular login credential (same as email and HR)
  - You will only see what you have permission to view
- If you cannot access to SUMMIT
  - Complete the CON-15 Form here: https://www.umb.edu/controller/forms

How do I login?

- SUMMIT is accessible from the following webpages:
  - UMass Boston Administration & Finance › Web Applications
    - https://www.umb.edu/administration_finance/applications
  - UMPO UITS Product Catalog
    - https://www.umassp.edu/uits/product-catalog

SUMMIT – Logging In

UMB A&F Web Applications Page

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Admissions · Academics · Campus Life · Research · About · Athletics

Current Students · Parents & Families · Faculty & Staff · Alumni

Home — Administration & Finance — Web Applications

Menu

- Departments
- Policies & Procedures
- Web Applications
- F&A Advisory Group
- Presentations

Web Applications

PeopleSoft Finance

Sign on to PeopleSoft

- For questions about PeopleSoft Finance Security & Training, please contact Bobby Kartsagoulis at 617.287.3810

Summit Finance

Sign on to Summit Finance

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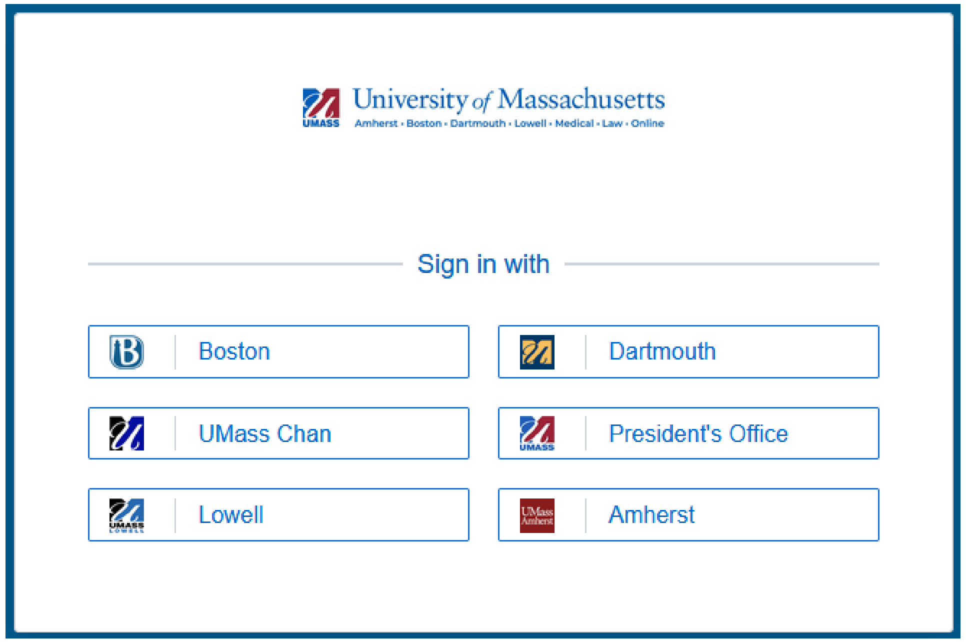
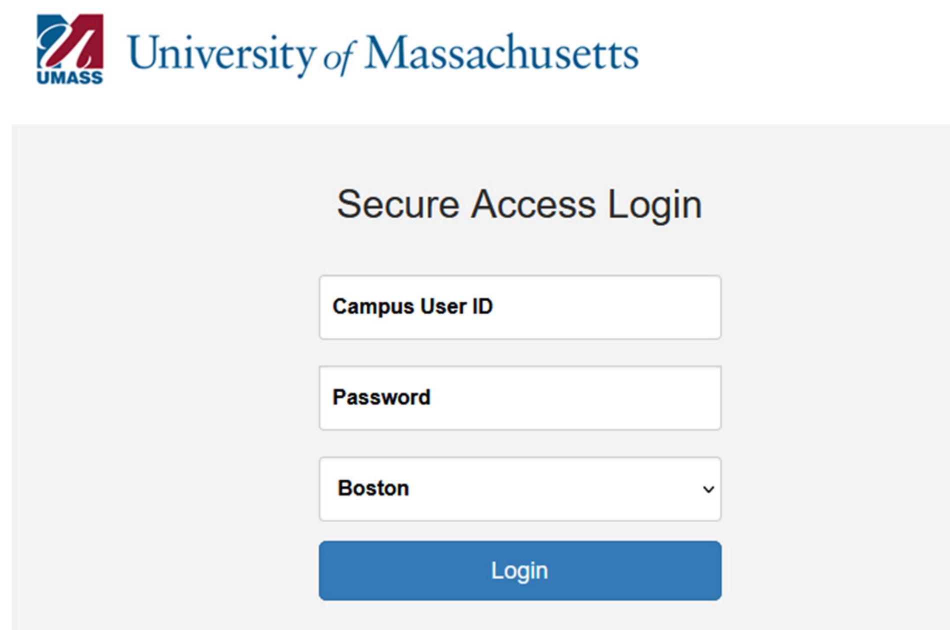
SUMMIT – Logging In

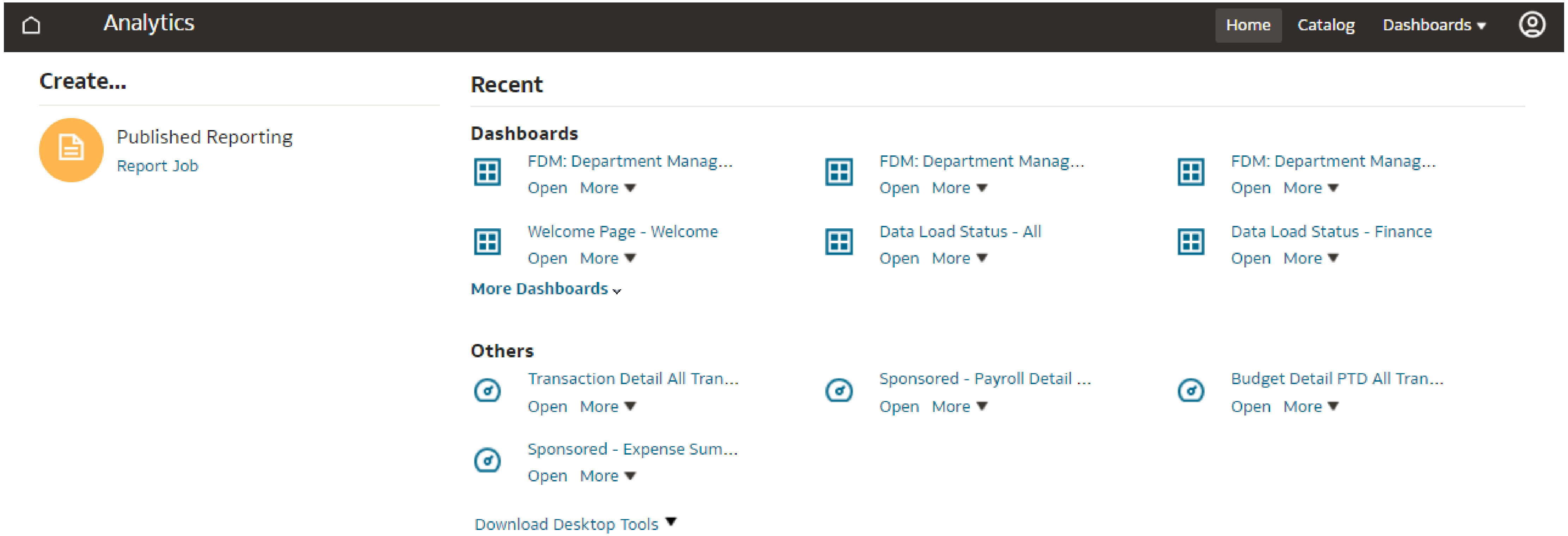
The SUMMIT link brings you to the login page

- Use your regular login credentials





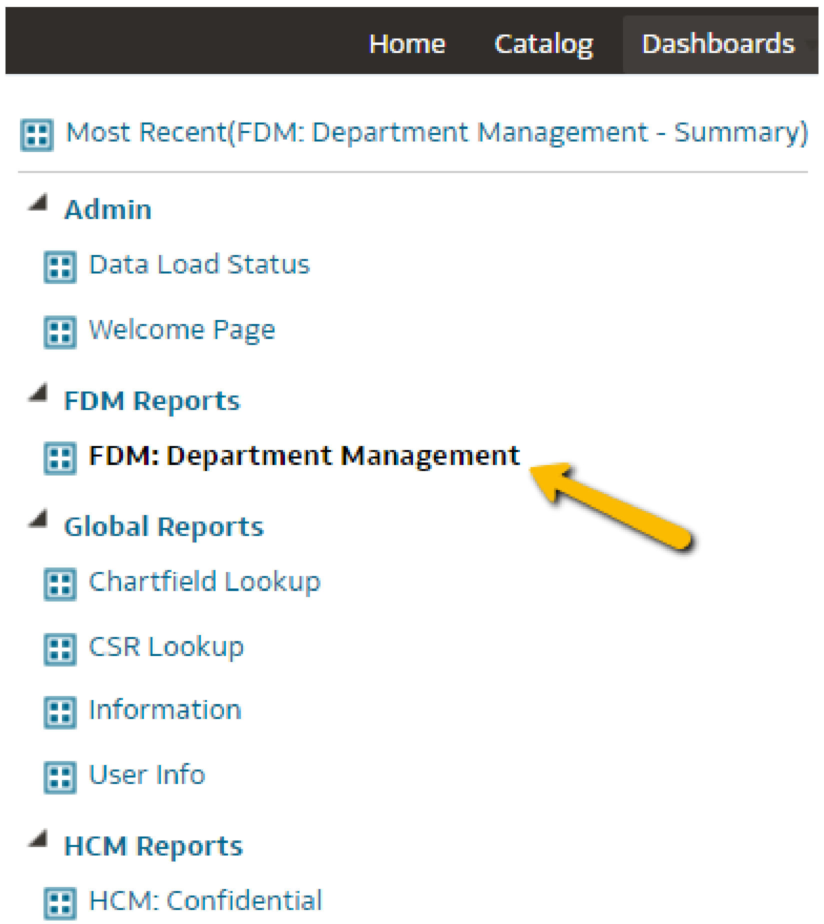
SUMMIT – Landing Page



- Shows the recent areas you have visited, click to open or
- Navigate to Dashboards using the dropdown menu on the upper right toolbar

SUMMIT – Dashboard Menu

SUMMIT Dashboards dropdown menu:



- Dashboards you have access to will be available to select
- Click FDM: Department Management

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SUMMIT – Dashboards

SUMMIT Dashboards – What are they?

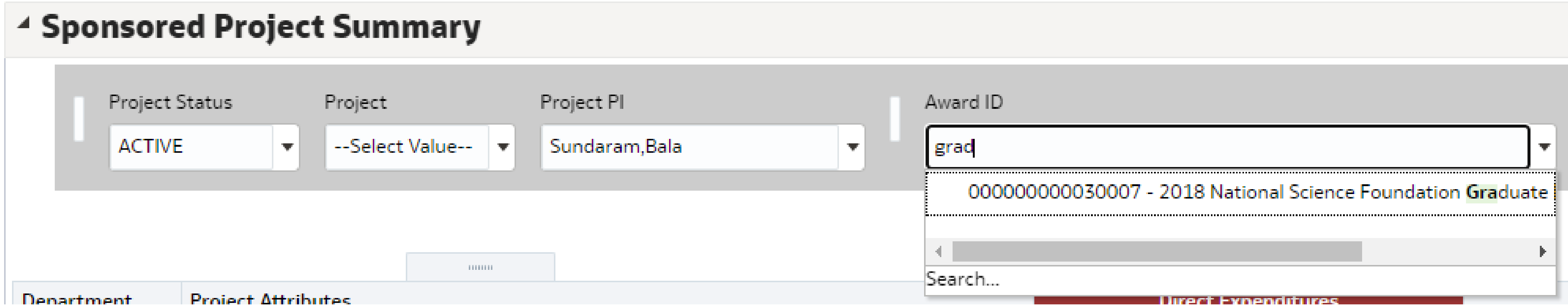
- Dashboards are a collection of interactive tools called ‘widgets’ designed to enable end users to run ad-hoc reports and perform personalized analysis
- UMass has designed the FDM: Financial Department Management dashboard to provide a variety of tools for managing various fiscal areas, including sponsored projects

- When accessing the FDM: Department Management Dashboard, you will always default to the Summary tab

SUMMIT – The Summary Tab

Navigating SUMMIT Dashboards – The Summary Tab

- On the Summary tab, scroll down to Sponsored Project Summary
- What you can view is based on your access in PeopleSoft Finance
- Type directly in the filter areas to narrow your results, once a filter is filled in, data available in additional filter fields is constrained by the selections already made



- You don't have to search using exact numbers

SUMMIT – The Summary Tab

Sponsored Project Summary on the Summary Tab

- This area provides a quick view of your sponsored projects
- Note the red section is Direct Expenditures only
- The All Expenditures section to the right of Direct Expenditures is inclusive of direct and indirect charges to your project

Sponsored Project Summary

Project Status	Project	Project PI	Award ID	Award PI	Grant Accountant	
ACTIVE	--Select Value--	Sundaram,Bala	000000000030007 - 2018 National Science Foundation Graduate R	--Select Value--	--Select Value--	Reset

Department	Project Attributes							Direct Expenditures			All Expenditures (Direct and Indirect)						
Dept ID	Project	PI Name	Ref Award Id	Days Remaining *	Project Start Date	Project End Date	Status	Fiscal Year to Date Expenditure	Project to Date Expenditure	Balance Remaining	Fiscal Month to Date Expenditure	Fiscal Year to Date Expenditure	Budget	Project to Date Expenditure	Encumbrance	Balance Remaining	% Remaining

- This section of the Summary tab is helpful, but the detail available here is limited

SUMMIT – The Summary Tab

Alerts on the Summary Tab

- On the Summary tab, scroll down to the Alerts Based on Today's Date
- For Sponsored Projects, the following alerts will populate if there is data present for your projects
  - In Deficit
  - With Balances Greater than 25% or 50%

Alerts - Based on Today's Date

Sponsored Projects with Deficit Balance

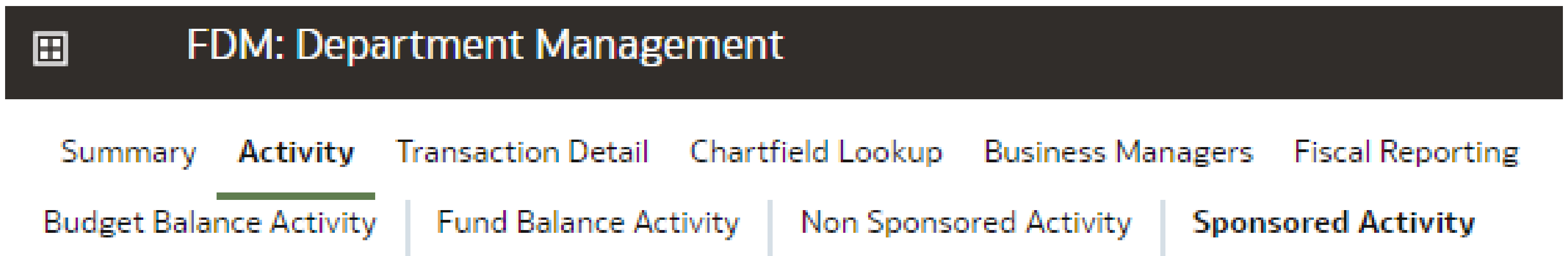
Sponsored Projects with Balance Remaining greater than 25%

Sponsored Projects with Balance Remaining greater than 50%

SUMMIT – Sponsored Activity

Navigating SUMMIT Dashboards – Sponsored Activity

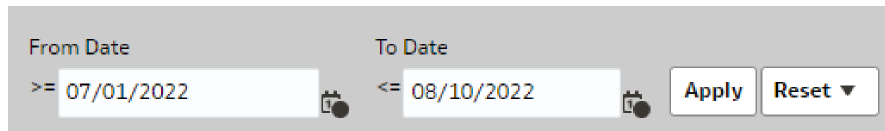
- Click the Activity tab, and Sponsored Activity page

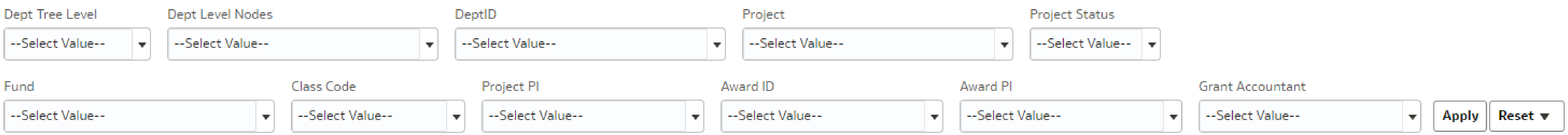


SUMMIT – Sponsored Activity

Filters on the Sponsored Activity Page

- Here you will see a series of filters to define your search criteria
- Note there are two filter sections, each with their own Apply and Reset buttons, the date range section is in gray



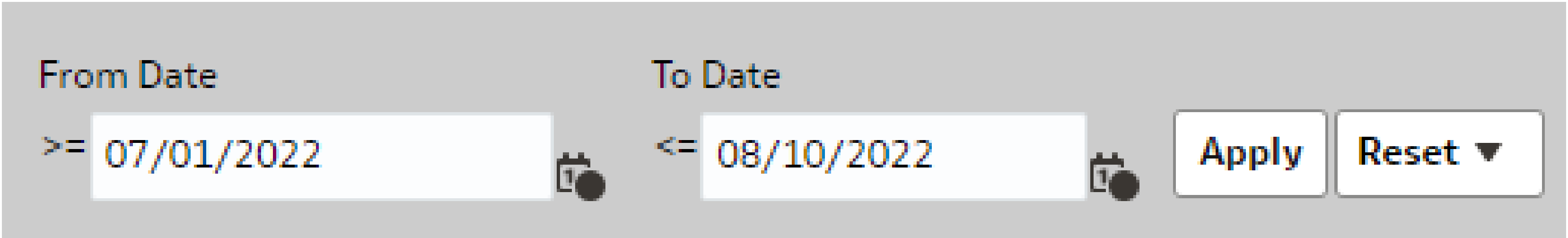


- You must click the Apply button for each section separately after you populate the filters in those sections

SUMMIT – Filters

Date Filters on the Sponsored Activity Page

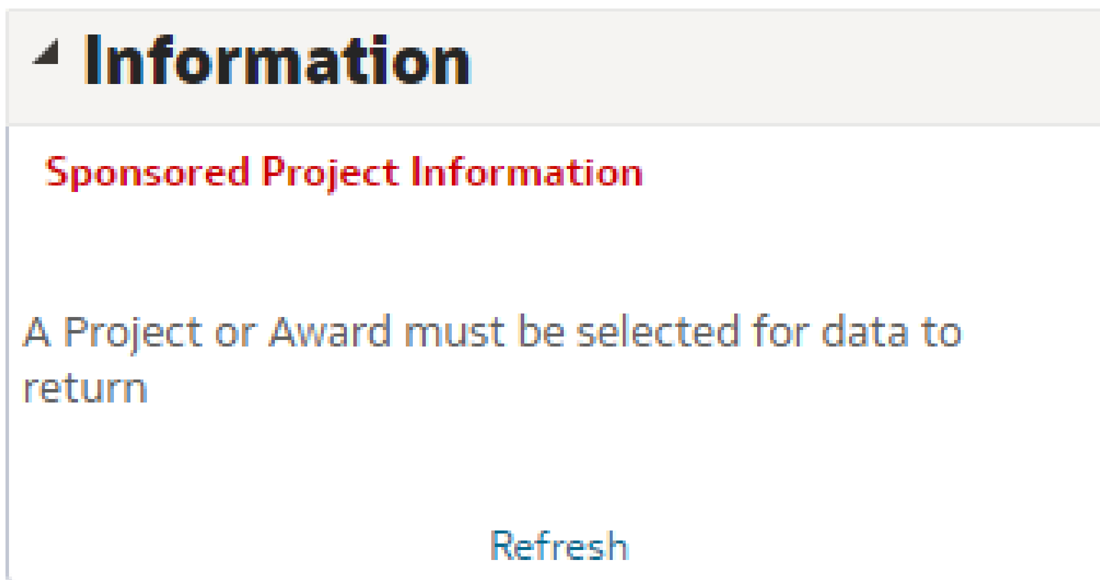
- These dates always default to:
  - From Date – beginning of the current fiscal year
  - To Date – today’s date
  - Remember that SUMMIT data is always one day behind
- These dates control the data that returns in the ‘Selected Date Range Expenditures’ Column in the Sponsored Activity Expenditure Summary section and the data that is pulled into the Sponsored Project Expenditures for Selected Dates report under Detail Transaction Reports
- Data is pulled in by Accounting Date and Journal Date
  - Payroll adjustments will show in the date range the adjustment was applied



SUMMIT – Filters

Filters on the Sponsored Activity Page

- When you first navigate to the Sponsored Activity Page, filters other than the date filters will be blank and if you have more than one Award, nothing will be populated in the Information box on the left
- Once a Project or Award is selected, this box will fill in with your Award details



SUMMIT – Filters

Filters on the Sponsored Activity Page – Expenditure Summary

- The Sponsored Activity Expenditure Summary section returns summarized values based on the filtered data
- Until filter values are populated, this data will be inclusive of everything you have access to

Information

Speedtype	112592
DeptID	B008300000
DeptID Description	Biology
Fund	53106
Fund Description	Federal Grants & Contracts
Ref. Award ID	1842403
Project Number	S20220000054811
Project Description	2022 NSF Fellowship - Barr
Project Status	ACTIVE
Project Type	BASC
Contract Type	LOC
Principal Investigator	Sundaram,Bala
Project Period	01-JUN-22 to 31-JUL-25
Sponsor	NATIONAL SCIENCE FOUNDATION
Award/Contract Number	000000000030007
F&A Base ID - Desc	NOFNA - No FNA on Award
F&A Rate	0.00%
Days Remaining	1081

Export

Detail Transaction Reports

Sponsored Project Revenue and Expenditures for Selected Dates

PTD Sponsored Project Revenue and Expenditures

Sponsored Project Open Encumbrance

Expenditures by Project Year Trend

Sponsored Activity Expenditure Summary

Sponsored Project Cost Transfer Documentation

Select View Summary

Account Group	Selected Date Range Expenditures	Budget	Project to Date Expenditures	Encumbrance	Balance	% Remaining
Special Salary	0.00	136,000.00	136,148.04	0.00	(148.04)	(0.11%)
Payroll Total	**0.00**	**136,000.00**	**136,148.04**	**0.00**	**(148.04)**	**(0.11%)**
Fringe Benefits	0.00	544.00	620.68	0.00	(76.68)	(14.10%)
Fringe Benefits Total	**0.00**	**544.00**	**620.68**	**0.00**	**(76.68)**	**(14.10%)**
National Travel	0.00	16,000.00	12,133.31	0.00	3,866.69	24.17%
Foreign Travel	0.00	4,000.00	0.00	0.00	4,000.00	100.00%
Other Non-Personnel	56,331.00	351,456.00	391,791.28	0.00	(40,335.28)	(11.48%)
Supplies and Materials	0.00	76,500.00	26,322.74	0.00	50,177.26	65.59%
Equipment Lease and Rent	0.00	3,500.00	734.77	0.00	2,765.23	79.01%
Operational Services Expense	0.00	10,000.00	1,249.18	0.00	8,750.82	87.51%
Human Subjects	0.00	0.00	0.00	0.00	0.00	
Other Expenditures	0.00	0.00	0.00	0.00	0.00	
Non Personnel Total	**56,331.00**	**461,456.00**	**432,231.28**	**0.00**	**29,224.72**	**6.33%**
Direct Expenses Total	**56,331.00**	**598,000.00**	**569,000.00**	**0.00**	**29,000.00**	**4.85%**
Total	**56,331.00**	**598,000.00**	**569,000.00**	**0.00**	**29,000.00**	**4.85%**

Export

Sponsored - Expense Summary by Month

Here we see the Sponsored Activity Expenditure Summary section and the Information section populated

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SUMMIT – Information Section

Filters on the Sponsored Activity Page – Information Section

- The Information section shows your Award details, including:
  - Sponsor, Start and End Dates, PI, F&A Rate, Title…
- Note – if an Award has multiple projects, the Primary Project information will default in, select a specific Project to view details for Projects other than the primary

Information

Speedtype	112592
DeptID	B008300000
DeptID Description	Biology
Fund	53106
Fund Description	Federal Grants & Contracts
Ref. Award ID	1842403
Project Number	S20220000054811
Project Description	2022 NSF Fellowship - Barr
Project Status	ACTIVE
Project Type	BASC
Contract Type	LOC
Principal Investigator	Sundaram,Bala
Project Period	01-JUN-22 to 31-JUL-25
Sponsor	NATIONAL SCIENCE FOUNDATION
Award/Contract Number	000000000030007
F&A Base ID - Desc	NOFNA - No FNA on Award
F&A Rate	0.00%
Days Remaining	1081

Export

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SUMMIT – Expenditure Summary

Filters on the Sponsored Activity Page – Expenditure Summary

- The Sponsored Activity Expenditure Summary section provides a summary view of your Award Budget, Expenditures, Encumbrances, and Remaining Balance
- Note the Selected Date Range Expenditures include costs applied that fall within the date range filters – To and From dates in the grey box at the top
- All hyperlinked numbers are drillable, click the number to see detail

Sponsored Activity Expenditure Summary

Sponsored Project Cost Transfer Documentation

Select View Summary

Account Group	Selected Date Range Expenditures	Budget	Project to Date Expenditures	Encumbrance	Balance	% Remaining
Special Salary	0.00	136,000.00	136,148.04	0.00	(148.04)	(0.11%)
Payroll Total	**0.00**	**136,000.00**	**136,148.04**	**0.00**	**(148.04)**	**(0.11%)**
Fringe Benefits	0.00	544.00	620.68	0.00	(76.68)	(14.10%)
Fringe Benefits Total	**0.00**	**544.00**	**620.68**	**0.00**	**(76.68)**	**(14.10%)**
National Travel	0.00	16,000.00	12,133.31	0.00	3,866.69	24.17%
Foreign Travel	0.00	4,000.00	0.00	0.00	4,000.00	100.00%
Other Non-Personnel	56,331.00	351,456.00	391,791.28	0.00	(40,335.28)	(11.48%)
Supplies and Materials	0.00	76,500.00	26,322.74	0.00	50,177.26	65.59%
Equipment Lease and Rent	0.00	3,500.00	734.77	0.00	2,765.23	79.01%
Operational Services Expense	0.00	10,000.00	1,249.18	0.00	8,750.82	87.51%
Human Subjects	0.00	0.00	0.00	0.00	0.00	
Other Expenditures	0.00	0.00	0.00	0.00	0.00	
Non Personnel Total	**56,331.00**	**461,456.00**	**432,231.28**	**0.00**	**29,224.72**	**6.33%**
Direct Expenses Total	**56,331.00**	**598,000.00**	**569,000.00**	**0.00**	**29,000.00**	**4.85%**
Total	**56,331.00**	**598,000.00**	**569,000.00**	**0.00**	**29,000.00**	**4.85%**

Export

Remember -
Data is pulled in by Accounting Date and Journal Date

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SUMMIT – Expenditure Summary

Sponsored Activity Expenditure Summary

Sponsored Project Cost Transfer Documentation

Select View Summary

Account Group	Selected Date Range Expenditures	Budget	Project to Date Expenditures	Encumbrance	Balance	% Remaining
Regular Salary	3,520.49	14,215.00	8,617.10	5,624.73	(26.83)	(0.19%)
Special Salary	3,238.07	33,371.00	15,903.43	0.00	17,467.57	52.34%
Payroll Total	**6,758.56**	**47,586.00**	**24,520.53**	**5,624.73**	**17,440.74**	**36.65%**
Fringe Benefits	1,427.68	9,010.00	3,475.76	2,289.83	3,244.41	36.01%
Fringe Benefits Total	**1,427.68**	**9,010.00**	**3,475.76**	**2,289.83**	**3,244.41**	**36.01%**
Direct Expenses Total	**8,186.24**	**56,596.00**	**27,996.29**	**7,914.56**	**20,685.15**	**36.55%**
Indirect Costs	1,227.85	8,489.00	4,199.36	0.00	4,289.64	50.53%
Indirect Costs Total	**1,227.85**	**8,489.00**	**4,199.36**	**0.00**	**4,289.64**	**50.53%**
Indirect Overhead and Other Total	**1,227.85**	**8,489.00**	**4,199.36**	**0.00**	**4,289.64**	**50.53%**
Total	**9,414.09**	**65,085.00**	**32,195.65**	**7,914.56**	**24,974.79**	**38.37%**

Export

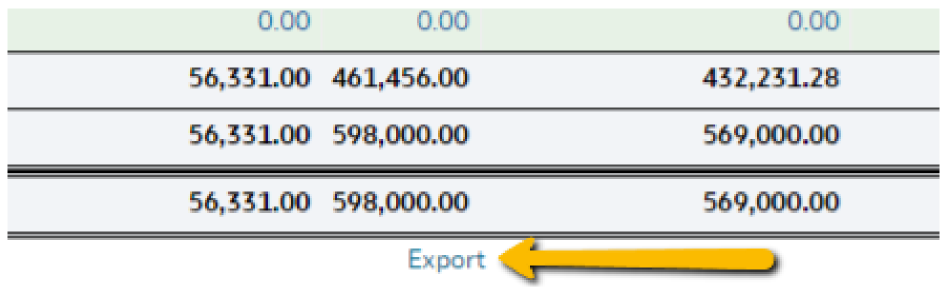
Sponsored - Expense Summary by Month

Note the Encumbrance column does NOT encumber F&A, always look at your Direct Expense Total for the true Balance Available that you have remaining for direct costs

SUMMIT – Expenditure Summary

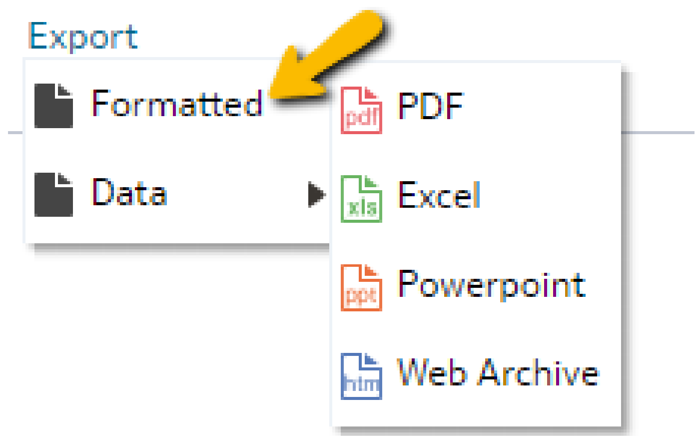
Sponsored Activity Expenditure Summary - Exportable

- The Sponsored Activity Expenditure Summary section can be exported by clicking the Export link



0.00	0.00	0.00
56,331.00	461,456.00	432,231.28
56,331.00	598,000.00	569,000.00
56,331.00	598,000.00	569,000.00

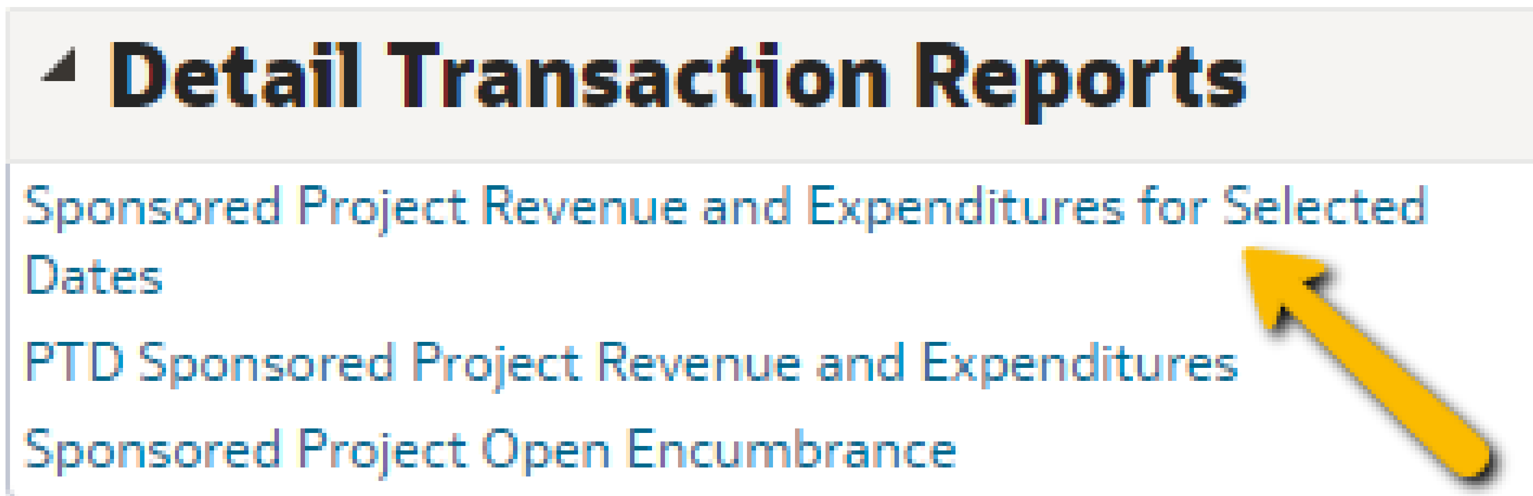
- Export to either Excel or PDF, use the Formatted export function



SUMMIT – Detail Transaction Reports

Reporting in SUMMIT – Detail Transaction Report for Selected Date Range

- Returns a detailed listing of all expenditures that fall within the filter date range
- Can be downloaded into Excel or as a PDF
- Totals in each category will match the Expenditure Summary section
- This is a great way to review expenses for financial reporting, or to see if an expected expense has posted



SUMMIT – Detail Reports

Reporting in SUMMIT – Detail Report Section

- Additional Reports are available at the bottom of the page in the Detail Reports section
- These reports only show if you check the box, this is the cut down on page load times

SUMMIT – Detail Reports

Reporting in SUMMIT – Payroll Detail by Employee

- Available by Payroll, Fringe, and Total Payroll and Fringe

Payroll Detail by Employee

Payroll by Employee

Payroll by Employee reflects amounts as of the end of the month of the chosen Selected End Date

Payroll Category: Total Payroll and Fringe

- Provides list by Employee, includes HR Encumbrance End Date

Employee Name	Selected Date Range Expenditures	Project to Date Expenditures	Encumbrance	Projected Payroll	HR Encumbrance End Date

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SUMMIT – Resources

Ongoing Training

- See ORSP/Training & Education webpage where you can:
  - Sign up for future training sessions
  - Attend scheduled drop-in sessions
- Additional group and one on one training is available upon request

Resources

- Please reach out to Ginny Maki with any Sponsored Project related SUMMIT questions
- Copies of this presentation can be emailed
- Contact: Virginia.Maki@umb.edu