

SUMMIT Fiscal Management of Sponsored Programs

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

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

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.

SUMMIT – The Basics: Access & Login

How do I get access?

- As a PI, you should 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: [Controller Forms](#)

How do I login?

- SUMMIT is accessible from the following webpages:
 - ORSP [Training](#) and [Tools & Resources](#)
 - UMass Boston Administration & Finance › [Web Applications](#)
 - UMPO ITS [Product Catalog](#)

SUMMIT – Logging In

The SUMMIT link brings you to the login page

- Use your regular login credentials



Amherst • Boston • Dartmouth • Lowell • Medical • Law • Online

Sign in with

 Boston	 Dartmouth
 UMass Chan	 President's Office
 Lowell	 Amherst



Secure Access Login

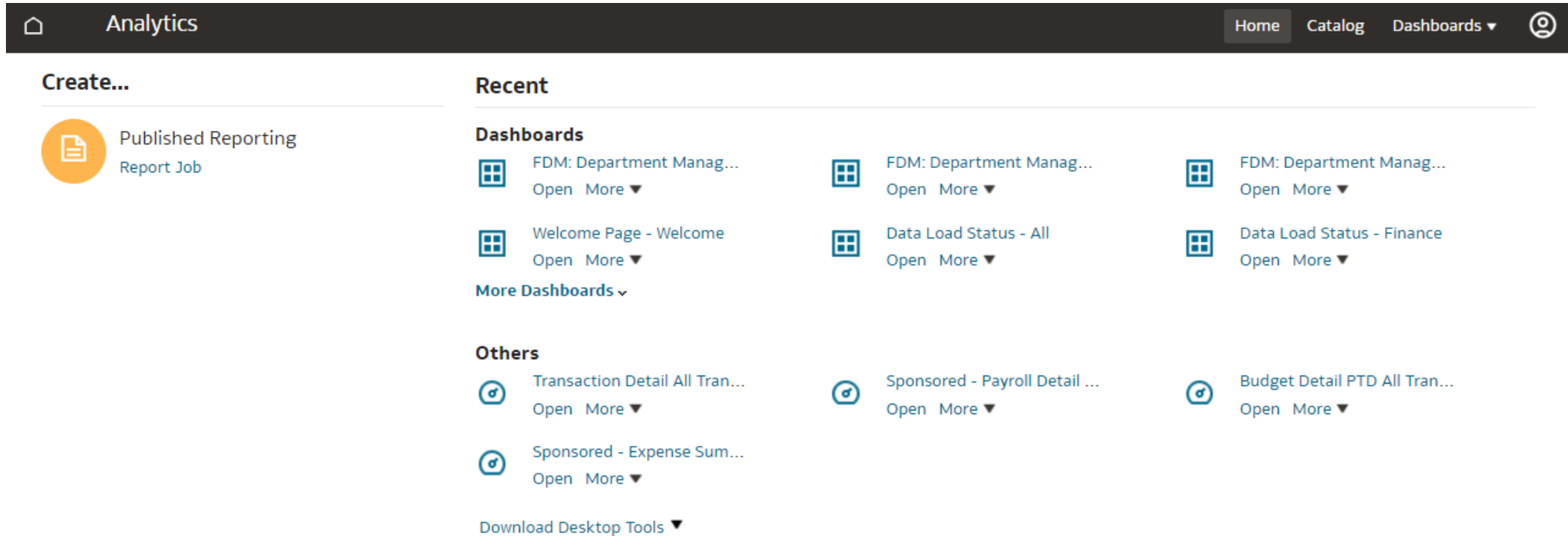
Campus User ID

Password

Boston

Login

SUMMIT – Landing Page



The screenshot displays the SUMMIT Analytics landing page. At the top, a dark navigation bar contains a home icon, the word 'Analytics', and a dropdown menu with 'Home', 'Catalog', and 'Dashboards'. A user profile icon is also present. Below the navigation bar, the page is divided into two main sections. The left section, titled 'Create...', features an orange circular icon with a document symbol and the text 'Published Reporting Report Job'. The right section, titled 'Recent', is further divided into 'Dashboards' and 'Others'. The 'Dashboards' section lists three items: 'FDM: Department Manag...', 'Welcome Page - Welcome', and 'Data Load Status - All', each with a grid icon and 'Open More' links. The 'Others' section lists three items: 'Transaction Detail All Tran...', 'Sponsored - Payroll Detail ...', and 'Budget Detail PTD All Tran...', each with a circular icon and 'Open More' links. A 'Download Desktop Tools' link is located at the bottom of the 'Recent' section.

Create...

 Published Reporting Report Job

Recent

Dashboards

 FDM: Department Manag...
Open More ▼

 Welcome Page - Welcome
Open More ▼

More Dashboards ▼

Others

 Transaction Detail All Tran...
Open More ▼

 Sponsored - Expense Sum...
Open More ▼

 Sponsored - Payroll Detail ...
Open More ▼

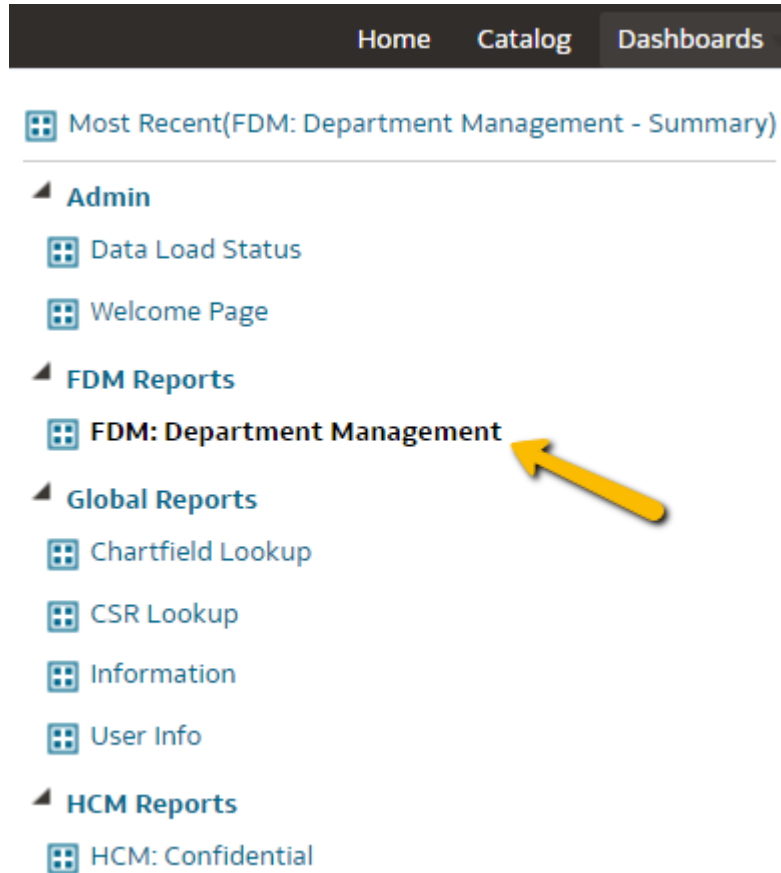
 Budget Detail PTD All Tran...
Open More ▼

Download Desktop Tools ▼

- 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

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 from the menu bar, 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

The screenshot displays the 'Sponsored Project Summary' dashboard. At the top, there are four filter fields: 'Project Status' (set to 'ACTIVE'), 'Project' (set to '--Select Value--'), 'Project PI' (set to 'Sundaram,Bala'), and 'Award ID' (containing the text 'grad'). Below the 'Award ID' field, a dropdown menu is open, showing a search result: '000000000030007 - 2018 National Science Foundation Graduate'. Below the filters, there are tabs for 'Department' and 'Project Attributes'. At the bottom, there is a red bar with the text 'Direct Expenditures'.

- 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

4 Sponsored Project Summary

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

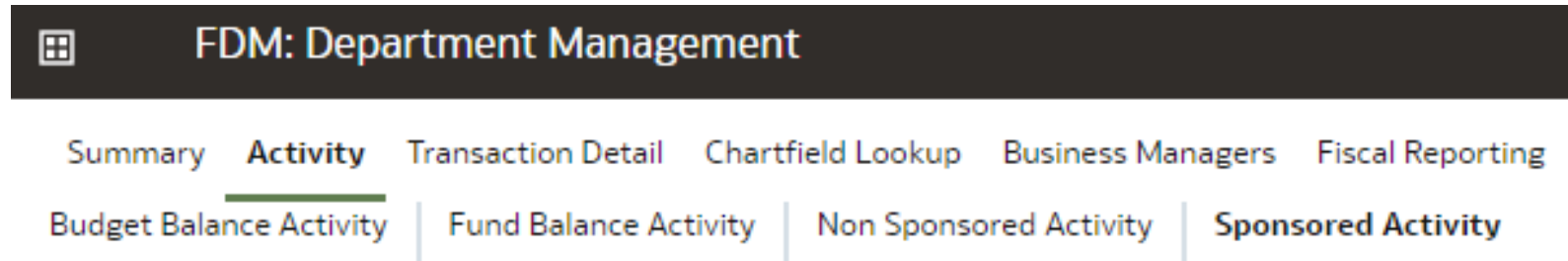
Sponsored Projects with Balance
Remaining greater than 25%

Sponsored Projects with Balance
Remaining greater than 50%

SUMMIT – Sponsored Activity

Navigating SUMMIT Dashboards – Sponsored Activity

- Click the Activity tab, and Sponsored Activity page



- You can also navigate directly the Sponsored Activity by clicking on the project hyperlink from the Summary 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

From Date To Date

>= 07/01/2022 <= 08/10/2022 Apply Reset ▼

Dept Tree Level Dept Level Nodes DeptID Project Project Status

--Select Value-- --Select Value-- --Select Value-- --Select Value-- --Select Value--

Fund Class Code Project PI Award ID Award PI Grant Accountant

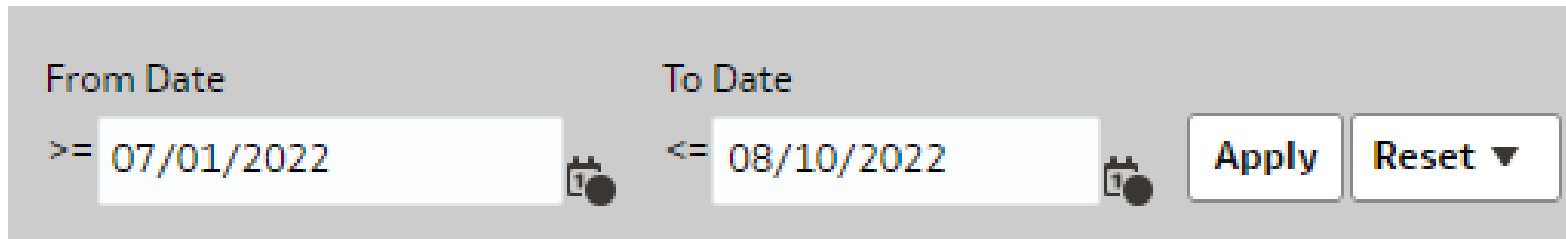
--Select Value-- --Select Value-- --Select Value-- --Select Value-- --Select Value-- --Select Value-- Apply Reset ▼

- 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



The screenshot shows a date filter interface with two input fields: 'From Date' and 'To Date'. The 'From Date' field contains the text '>= 07/01/2022' and the 'To Date' field contains '<= 08/10/2022'. Each field has a calendar icon to its right. To the right of the 'To Date' field are two buttons: 'Apply' and 'Reset' with a downward arrow.

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

Information

Sponsored Project Information

A Project or Award must be selected for data to return

Refresh

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	00000000030007
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

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	00000000030007
F&A Base ID - Desc	NOFNA - No FNA on Award
F&A Rate	0.00%
Days Remaining	1081
Export	

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

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

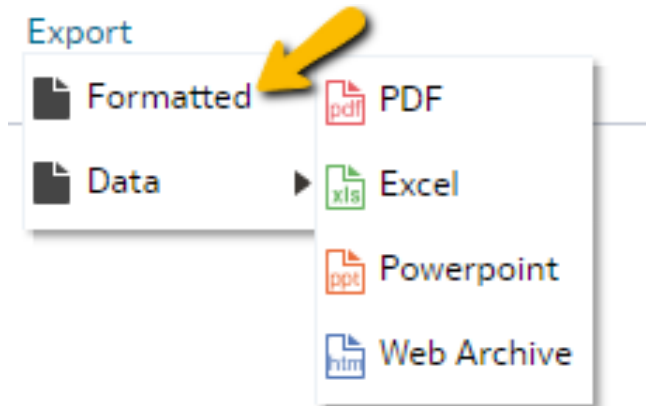
Sponsored Activity Expenditure Summary - Exportable

- 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

- 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

◀ **Detail Transaction Reports**

Sponsored Project Revenue and Expenditures for Selected Dates

PTD Sponsored Project Revenue and Expenditures

Sponsored Project Open Encumbrance



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

Detail Reports

Select Reports

☒ Payroll Detail by Employee

☐ Procurement Summary - Open PO Lines

☐ Voucher Detail

☐ Procard Detail

☐ Travel & Expense Detail

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](#) 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