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
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

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

Web Applications

PeopleSoft Finance

Sign on to PeopleSoft

- For questions about PeopleSoft Finance Security & Training, please contact Bobby Kartsagoulis at 617.287.3510

Summit Finance

Sign on to Summit Finance
SUMMIT – Logging In

The SUMMIT link brings you to the login page

➢ Use your regular login credentials

![Login page screenshot with options: Boston, Dartmouth, UMass Chan, President's Office, Lowell, Amherst.]

Secure Access Login

- Campus User ID
- Password
- Boston

Login
**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

<table>
<thead>
<tr>
<th>Dashboards</th>
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<tbody>
<tr>
<td>FDM: Department Manager... (Open : More ▼)</td>
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<tr>
<td>Welcome Page - Welcome (Open : More ▼)</td>
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<tr>
<td>More Dashboards ▼</td>
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<table>
<thead>
<tr>
<th>Others</th>
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</thead>
<tbody>
<tr>
<td>Transaction Detail All Trans... (Open : More ▼)</td>
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<tr>
<td>Sponsored - Payroll Detail ... (Open : More ▼)</td>
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<td>Budget Detail PTD All Trans... (Open : More ▼)</td>
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**Analytics**
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, you will always default to 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

- 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.

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

<table>
<thead>
<tr>
<th>Information</th>
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<td>Speedtype</td>
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<td>DeptID</td>
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<td>DeptID Description</td>
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<td>Fund</td>
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<tr>
<td>Fund Description</td>
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<tr>
<td>Ref. Award ID</td>
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<tr>
<td>Project Number</td>
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<td>Project Description</td>
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<td>Project Status</td>
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<td>Project Type</td>
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<td>Contract Type</td>
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<td>Principal Investigator</td>
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<td>Project Period</td>
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<td>Sponsor</td>
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<tr>
<td>Award/Contract Number</td>
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<tr>
<td>F&amp;A Base ID - Desc</td>
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<tr>
<td>F&amp;A Rate</td>
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<tr>
<td>Days Remaining</td>
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</tbody>
</table>
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.

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

- 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

➢ Provides list by Employee, includes HR Encumbrance End Date

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Payroll Category</th>
<th>Total Payroll and Fringe</th>
<th>Selected Date Range Expenditures</th>
<th>Project to Date Expenditures</th>
<th>Encumbrance</th>
<th>Projected Payroll</th>
<th>HR Encumbrance End Date</th>
</tr>
</thead>
</table>
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

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