

Summit Overview

The Department Management Dashboard



Welcome to the Department Management Dashboard

The purpose of the new FDM: Department Management dashboard is to consolidate 4 existing dashboards which will give users one place to access common financial reports in one dashboard. The dashboards that are being combined are:

FDM: Academic Admin

FDM: Department Admin

FDM: PI

FDM: Transaction Detail Analysis

Changes from existing dashboards:

Summary Page

Alerts and Reports that were previously shown on the left hand side of the Summary page are now at the bottom of the page to maximize space for the essential reports.

From:

Through Fiscal Period

2020-03 (Sep, 2019) ▼

Dept Tree Level

--Select Value-- ▼

** Apply to Sponsored Project Activity only*

Data Refreshed

The data is as of **September 22, 2019**

Alerts - Based on Today's Date

BuyWays - Catalog/Punchout Requisitions less than \$2,500

Fiscal Year Budget Balance with Deficit Balance

Fiscal Year Fund Balance with Deficit Balance

Shortcuts

Google Search

Finance Production

Reports

BuyWays Analysis

Available Balance b

To:

From: Upstreamed > Report Summary: Item: Department Admin

Alerts - Based on Today's Date

BuyWays - Catalog/Punchout
Requisitions less than \$2,500

Sponsored Projects with
Deficit Balance

Sponsored Projects with Balance
Remaining greater than 25%

Sponsored Projects with Balance
Remaining greater than 50%

Payroll Encumbrance End Dates
Expiring in 30 Days or Less

Fiscal Year Budget Balance
with a Deficit balance

Fiscal Year Fund Balance
with Deficit Balance

Reports

BuyWays Analysis

Demographics

F & A Distribution

Summit Overview

The Department Management Dashboard



The order of the Summary reports have been changed to the following

- Fiscal Year Budget Balance Summary
- Fiscal Year Fund Balance Summary
- Sponsored Project Summary
- Non- Sponsored Project Summary

Sponsored specific prompts have been removed from the main dashboard prompt and placed directly above the Sponsored Project reports. A Project Status prompt has been added which eliminates the need for separate links to an “All Project” report and an “Inactive Projects” report.

Sponsored Project Summary

Project Status	Project	Project PI	Award ID	Award PI	Grant Accountant
ACTIVE	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--

Non-Sponsored specific prompts have been added directly above the Non-Sponsored Project reports. A Project Status prompt has been added which eliminates the need for separate links to an “All Project” report and an “Inactive Projects” report.

Project Status	Project	Type of Funds	Project Manager	Department Manager	Reset
ACTIVE	--Select Value--	PG_BUDG_BASE	--Select Value--	--Select Value--	

Activity Pages

The new dashboard is utilizing subpages which allows one main page to have many subpages. The activity pages (Budget Balance, Fund Balance, Non-Sponsored and Sponsored) have been moved to subpages of the Activity page.

FDM: Department Management				
Summary	Activity	Transaction Detail	Chartfield Lookup	
Budget Balance Activity Fund Balance Activity Non Sponsored Activity Sponsored Activity				

The Subpages can be reached by clicking a Fund or Project from the Summary page or by clicking the Activity page and then one of the subpages. Each of the subpages consist of a Revenue/Expense Summary and detail reports. The detail reports have been changed to a ‘select’ menu so that the reports will only run when users want to view them.

Summit Overview

The Department Management Dashboard



Detail Reports

Select Reports

- ☐ Payroll Detail by Employee
- ☐ Procurement Summary - Open PO Lines
- ☐ Voucher Detail
- ☐ Procard Detail
- ☐ Travel & Expense Detail

The Budget Balance Activity, Fund Balance Activity, and Non-Sponsored Activity pages include an option to switch the Revenue/Expense Summary report from the standard/default account view to the UM-Plan account view. (UM-Plan is the University Budgeting tool.) The Sponsored Activity page is not affected by the UM-Plan account view.

* Select Account View

- ☒ Default Account Tree ☐ UM-Plan Account Tree

Sponsored Activity

The Sponsored activity page has been updated to use a 'From Date' and 'To Date' prompt rather than the 'Through Fiscal Period' that is on the other pages. This new feature allows users to input the start and end dates of a project or an award or any other period desired. The data returned is based on the transactions accounting date.

Activity | **Sponsored Activity**

From Date	To Date	
>= 07/01/2019 12:00:00 AM	<= 09/23/2019 12:00:00 A	Apply Reset ▼

Additional prompting values were also added based on feedback from the Grant Accounting core team.

Drill Reports (i.e. drilling into amounts on Summary pages or Activity pages)

New functionality has been added to the drill reports to provide two views, 'Screen View' and 'Download View'. The 'Screen View' separates each section by the expense type and the 'Download View' has all data in one view with all columns and rows. The 'Download View' is best when users are downloading data into excel for other purposes. The 'Download View' eliminates the need to reformat the excel spreadsheet to put the columns in the same order.

Summit Overview

The Department Management Dashboard



Through Fiscal Period: 2020-08 (Feb, 2020)
Dept Node: All Department Nodes
DeptID: D101002000 - Chancellor's Housing
Fund: 51161 - General Operating Fund
Project: All Projects

University of Massachusetts
Month to Date Transaction Detail
Time Run: 2/18/2020 11:06:53 AM

Payroll

Choose Table Display Screen View
Screen View
Download View

Account	Account Desc	Fund Code	DeptID	Project/Grant	Program Code	Class	Journal Date	Journal ID	Source	Employee Name	Emp ID
---------	--------------	-----------	--------	---------------	--------------	-------	--------------	------------	--------	---------------	--------

Transaction Detail

The transaction detail analysis dashboard has been incorporated directly into the Department Management dashboard in order for users to have one dashboard to go to. The transaction detail analysis dashboard pages (Revenue and Expenditure, Revenue, Encumbrance, Budget and Balance Sheet) are now subpages of the Transaction Detail page.

The date prompts ('From' and 'To' periods) will initially default to the Current Fiscal Year and the reports will not run until prompts have been selected/updated and the 'continue' button clicked or the 'continue' button clicked. Deferring the generating of the reports until prompts are entered and the 'continue' button clicked will help performance as users will not have to wait for the page to load before selecting/updating the prompts.

From Period	To Period	Dept Tree Level	Dept Level Nodes
2020-01 (Jul, 2019) ▼	2020-03 (Sep, 2019) ▼	--Select Value-- ▼	--Select Value-- ▼

Message at the top of the page

Opening this dashboard page may take a while. Select prompt values and click Continue if you want to open this page.

Continue

The transaction detail includes separate sections for different types of transactions. If a user wants to download the transaction detail to excel, select the table view which is located just below the prompts. The table view allows users to download the multiple sections with different column headings and eliminates the need to reformat the excel spreadsheet to put the columns in the same order.

From Period	To Period	Dept Tree Level	Dept Level Nodes					
2020-01 (Jul, 2019) ▼	2020-07 (Jan, 2020) ▼	--Select Value-- ▼	--Select Value-- ▼					
DeptID	Project	Fund	Program	Class				
--Select Value-- ▼	--Select Value-- ▼	--Select Value-- ▼	--Select Value-- ▼	--Select Value-- ▼				
Account	Employee	VendorID	Account Group	Requisition	Purchase Order	Voucher	Journal ID	Journal Source
--Select Value-- ▼	--Select Value-- ▼	--Select Value-- ▼	--Select Value-- ▼	--Select Value-- ▼	--Select Value-- ▼	--Select Value-- ▼	--Select Value-- ▼	--Select Value-- ▼
Reset ▼								

Transaction Detail - Revenue and Expenditure - Table view

Summit Overview

The Department Management Dashboard



Breadcrumbs

When navigating in Summit, use the breadcrumbs at the bottom of the page to return to a previous page. Do not use the back arrow and do not navigate back by directly selecting a tab/page as doing so will carry prompts back. Using the breadcrumbs results in the page displaying exactly as it was.

The screenshot shows the Summit web application interface. At the top, there is a navigation bar with the Summit logo and the title 'FDM: Department Management'. Below this, there are tabs for 'Summary', 'Activity', 'Demographics', and 'Transaction Detail'. The 'Summary' tab is selected. Under the 'Summary' tab, there are sub-tabs for 'Budget Balance Activity', 'Fund Balance Activity', 'Non Sponsored Activity', and 'Sponsored Activity'. The 'Budget Balance Activity' sub-tab is selected. Below the sub-tabs, there are filters for 'Through Fiscal Period' (set to '2020-08 (Feb, 2020)'), 'Dept Tree Level' (set to '--Select Value--'), and 'Dept Level Nodes' (set to '--Select Value--'). There is also a 'Criteria' section with a 'Manager Name' field set to 'Stebbins, Katie' and an 'Export' button. Below this, there is a 'Through Fiscal Period Reports' section with links for 'Budget Balance Fiscal MTD Expenditures' and 'Budget Balance YTD Open Encumbrance'. There is also a 'Fiscal Year Buc' button. Below this, there is a 'Detail Reports' section with a 'Select Reports' box containing checkboxes for 'Payroll Detail by Employee', 'Procurement Summary - Open PO Lines', 'Voucher Detail', 'Procard Detail', and 'Travel & Expense Detail'. At the bottom of the page, there is a breadcrumb trail: 'FDM: Department Management: Summary > FDM: Department Management: Budget Balance Activity'. The 'Summary' part of the breadcrumb is highlighted with a green underline.

Do not use if Breadcrumbs are available

Use Breadcrumbs