

# Summit Overview

## The Academic Admin Dashboard



### Welcome to the Academic Admin Dashboard

As an Academic Administrator, you now have access to the Summit Academic Admin Dashboard. This dashboard provides you with data pertinent to your day-to-day processes.

When you access the Academic Admin Dashboard, your default view will be the **Summary** tab. This tab provides you with high-level activities related to key business drivers. You will also notice several other tabs at the top of the Dashboard.

- **Sponsored Activity:** Displays information for Sponsored Projects.
- **Fund Balance Activity:** Displays information for those chart-strings that carry forward the fund balance from year to year.
- **Budget Balance Activity:** Displays information for those chart-strings that receive an annual budget allocation.
- **Non-Sponsored Project Activity:** Displays information for Non-Sponsored Projects.
- **Transaction Detail:** Displays detailed transaction information for a selected time-frame, including transactions for Revenue, Expenses, Budgets, and Encumbrances.
- **Demographics:** Displays non-financial information, including Speedtype, for sponsored project, fund balance, budget balance, and non-sponsored projects.

It is strongly recommended that you drill down to the data on these tabs by selecting the project or fund from the **Summary** tab; drilling down ensures that the filter criteria you entered on the **Summary** tab is automatically populated.

### How do I view Dashboard information?

The **Summary** tab provides you with information (referred to as widgets) for each activity area, including Sponsored Projects, Fund Balance Fund, Budget Balance Fund, and Non-Sponsored Projects. These widgets are displayed in table or graph format. You can refine the data that is displayed in these widgets by entering values in the Prompt fields at the top of the Summary tab (as shown in the screenshot below). You can select one or multiple prompt values (e.g., Fiscal Period, Dept ID, Fund, etc.).

The screenshot shows the Summit Academic Admin Dashboard interface. At the top, there are navigation tabs: Summary, Sponsored Activity, Fund Balance Activity, Budget Balance Activity, Non-Sponsored Project Activity, Transaction Detail, and Demographics. A 'Page Options' dropdown is on the far right. Below the tabs, a message indicates the data is as of Wednesday, October 19, 2011, and is using Summit PROD pointing to the OBPRD00 database. A red arrow labeled 'Prompts' points to a filter section containing several dropdown menus: 'Through Fiscal Period' (set to 2012-04), 'Dept Tree Level', 'Dept Level Nodes', 'DeptID', 'Fund', 'Award PI', 'Project PI', and 'Grant Accountant'. Below the filters, a note states '\* Apply to Sponsored Project Activity only'. The main content area features three widgets. On the left is an 'Alerts' widget with three yellow warning icons and links to 'Sponsored Project Summary'. The middle widget is 'Sponsored Lowest Budget Remaining Balance - Direct Expenditures', showing a bar chart with 'Days Remaining' (red bars) and '% Remaining' (blue bars). The right widget is 'Sponsored Project Counts', displaying a table of project counts by days remaining.

Days Remaining	Count *
1-30	21
31-60	18
61-90	97

\* Project Counts is based on today's data  
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### How do I drill into an activity?

The Academic Admin Summary page includes summary financial data for Sponsored Projects, Fund Balance Funds, Budget Balance Funds and Non-Sponsored Projects. In order to view activity for a particular project or fund, click the appropriate Project or Fund link. You will be navigated from the Summary page to the Activity page.

Fiscal Year Budget Balance Summary								
DeptID	Fund	Fiscal Month To Date Expenditure	Budget	Fiscal Year To Date Expenditure	Encumbrance	Balance	% Remaining	Through Fiscal Period
L620300000 - Psychology	<b>81161 - Operating Fund</b>	3,317.25	17,323.00	10,379.57	59.95	6,883.48	39.74%	2012-03 (Sep, 2011)
<b>Grand Total</b>		<b>3,317.25</b>	<b>17,323.00</b>	<b>10,379.57</b>	<b>59.95</b>	<b>6,883.48</b>	<b>39.74%</b>	

1 Total Records  
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Fiscal Year Budget Balance Summary Widget on the Summary page.

The Activity page provides a snapshot of the project or fund, including a Revenue and Expense Summary, Payroll Detail, Procurement Summary, Voucher Detail by PO and Procard Detail. Typically, the Activity page displays information for the selected month, with links for additional information (e.g., payroll detail by chartfield, year to date activity, project to date activity, etc.).

Manager Name: Moore, Summer

Average Non Personnel Expenditures per month (rolling 12 months)

Select View: Chart

\* The Average is computed over a 12 month time period  
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#### Fiscal Year Budget Balance Expense Summary

	Fiscal Month to Date Expenditure	Fiscal Year Budget	Fiscal Year to Date Expenditure	Encumbrance	Balance	%
Total Expense Budget	0.00	17,323.00	0.00	0.00	17,323.00	100.00%
Unallocated Expense Budget Total	0.00	17,323.00	0.00	0.00	17,323.00	100.00%
All Expenses Other Total	0.00	17,323.00	0.00	0.00	17,323.00	100.00%
Employee Related Expenses	477.03	0.00	6,095.94	0.00	(6,095.94)	
Administrative Expenses	0.00	0.00	0.00	59.95	(59.95)	
Facility Operational Expenses	280.22	0.00	523.63	0.00	(523.63)	
Information Technology	0.00	0.00	1,200.00	0.00	(1,200.00)	
Fund Deductions	2,560.00	0.00	2,560.00	0.00	(2,560.00)	
Non Payroll Expense Total	3,317.25	0.00	10,379.57	59.95	(10,439.52)	
Direct Expenses Total	3,317.25	0.00	10,379.57	59.95	(10,439.52)	
<b>Total</b>	<b>3,317.25</b>	<b>17,323.00</b>	<b>10,379.57</b>	<b>59.95</b>	<b>6,883.48</b>	<b>39.74%</b>

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**Budget Balance - Expense Summary - All Accounts** ← **All Accounts Link**

[Budget Balance - Expense Summary by Month](#)

#### Payroll Detail by Employee (excludes Fringe)

Searching... To cancel, click [here](#)

[Payroll Detail by Employee with Chartfield](#)

#### Procurement Summary - Open PO Lines

PO #	Vendor Name #	Account	Fiscal Year to Date PO Amount	Cumulative Disencumbered Amount	* Remaining Balance	YTD Vouchered Amount
0005239074	BEST PRESS	734310 - Printing Expenses & Supplies	59.95	0.00	59.95	0.00
<b>Grand Total</b>			<b>59.95</b>	<b>0.00</b>	<b>59.95</b>	<b>0.00</b>

Budget Balance Activity Page.

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**How do I access summarized Revenue and Expense information (previously known as the 7045 report)?**

At the Activity Page (see previous question for how to navigate there), the Revenue and Expense summary shown is summarized by Expense Category. When you select the All Accounts link, you will pull back the Revenue and Expense information.

**Can I print and/or download widgets within the Academic Admin Dashboard?**

Yes, each widget will include a **Print** or **Download** link at the bottom of the widget. Print options include HTML and PDF. Download options include Microsoft Excel, CSV, and PowerPoint. It is recommended that you print the PDF version for formatting purposes.

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