

# Summit Overview

## The Department Admin Dashboard



### Welcome to the Department Admin Dashboard

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

When you access the Department 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:

- **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 Chart-strings that receive an annual Budget allocation.
- **Non-Sponsored Project Activity**: Displays information for Non-Sponsored Projects.
- **Sponsored Activity**: Displays information for Sponsored Projects.
- **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 using the widgets on 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 high level widgets for each activity area, including Fund Balance Funds, Budget Balance Funds, Non-Sponsored Projects, and 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., Through Fiscal Period, DeptID, Fund, etc.).

The screenshot shows the Summit Department Admin Dashboard interface. At the top, there are tabs for Summary, Fund Balance Activity, Budget Balance Activity, Non-Sponsored Project Activity, Sponsored Activity, and Demographics. Below the tabs, there are prompts for data as of (Wed, Oct 19, 2011) and the database used (Summit PROD). A red box highlights the filter section with the following fields: Through Fiscal Period (2012-04 (Oct, 2011)), Dept Tree Level (All Choices), Dept Level Nodes (All Choices), DeptID (All Choices), and Fund (All Choices). A red arrow points to this section with the label "Prompts". Below the filter section, there are several widgets. A red arrow points to the "Available Balance by Activity Type Summary" widget, which is a bar chart showing Available Balance for four activity types: Fiscal Year Fund Balance, Fiscal Year Budget Balance, Non-Sponsored Projects, and Sponsored Project Direct. A table below the chart shows the data for Fiscal Year Fund Balance: Activity Type: Fiscal Year Fund Balance, Available Balance: 104,332,482.36. Other widgets include Alerts, Shortcuts, and Fiscal Year Available Balance by Fund.

Activity Type	Available Balance
Fiscal Year Fund Balance	104,332,482.36

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### How do I drill into an activity?

The Department Admin Summary page includes summary financial data for Fund Balance Funds, Budget Balance Funds, Non-Sponsored Projects and 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.

DeptID	Fund	Fiscal Month To Date Expenditure	Budget	Fiscal Year To Date Expenditure	Encumbrance	Balance	% Remaining	Through Fiscal Period
L620300000 - Psychology	<b>51161 - Operating Fund</b>	622.15	70,724.00	11,001.72	419.65	59,302.63	83.85%	2012-04 (Oct, 2011)
<b>Grand Total</b>		<b>622.15</b>	<b>70,724.00</b>	<b>11,001.72</b>	<b>419.65</b>	<b>59,302.63</b>	<b>83.85%</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	% Remaining
Total Expense Budget	0.00	70,724.00	0.00	0.00	70,724.00	100.00%
Unallocated Expense Budget Total	0.00	70,724.00	0.00	0.00	70,724.00	100.00%
All Expenses Other Total	0.00	70,724.00	0.00	0.00	70,724.00	100.00%
Employee Related Expenses	490.70	0.00	6,588.64	0.00	(6,588.64)	
Administrative Expenses	0.00	0.00	0.00	419.65	(419.65)	
Facility Operational Expenses	131.45	0.00	655.08	0.00	(655.08)	
Information Technology	0.00	0.00	1,200.00	0.00	(1,200.00)	
Fund Deductions	0.00	0.00	2,560.00	0.00	(2,560.00)	
<b>Non Payroll Expense Total</b>	<b>622.15</b>	<b>0.00</b>	<b>11,001.72</b>	<b>419.65</b>	<b>(11,421.37)</b>	
<b>Direct Expenses Total</b>	<b>622.15</b>	<b>0.00</b>	<b>11,001.72</b>	<b>419.65</b>	<b>(11,421.37)</b>	
<b>Total</b>	<b>622.15</b>	<b>70,724.00</b>	<b>11,001.72</b>	<b>419.65</b>	<b>59,302.63</b>	<b>83.85%</b>

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

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

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

**Payroll Detail by Employee**

No data found for the filter criteria

[Refresh](#)

[Payroll Detail by Employee with Chartfields](#)

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**Procurement Summary - Open PO Lines**

Budget Balance Activity Page.

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

See previous question. At the Activity Page, 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 Department 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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