

# Summit Overview

## The Facilities Management Dashboard



### Welcome to the Facilities Management Dashboard

As a Facilities Manager, you now have access to the Summit Facilities Management Dashboard. This dashboard provides data pertinent to your day-to-day processes.

When you access the Facilities Management 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 have access to the **Demographics** tab. This tab is a good reference point for your non-financial information for Fund Balance, Budget Balance, and Non-Sponsored Projects, including Speedtype.

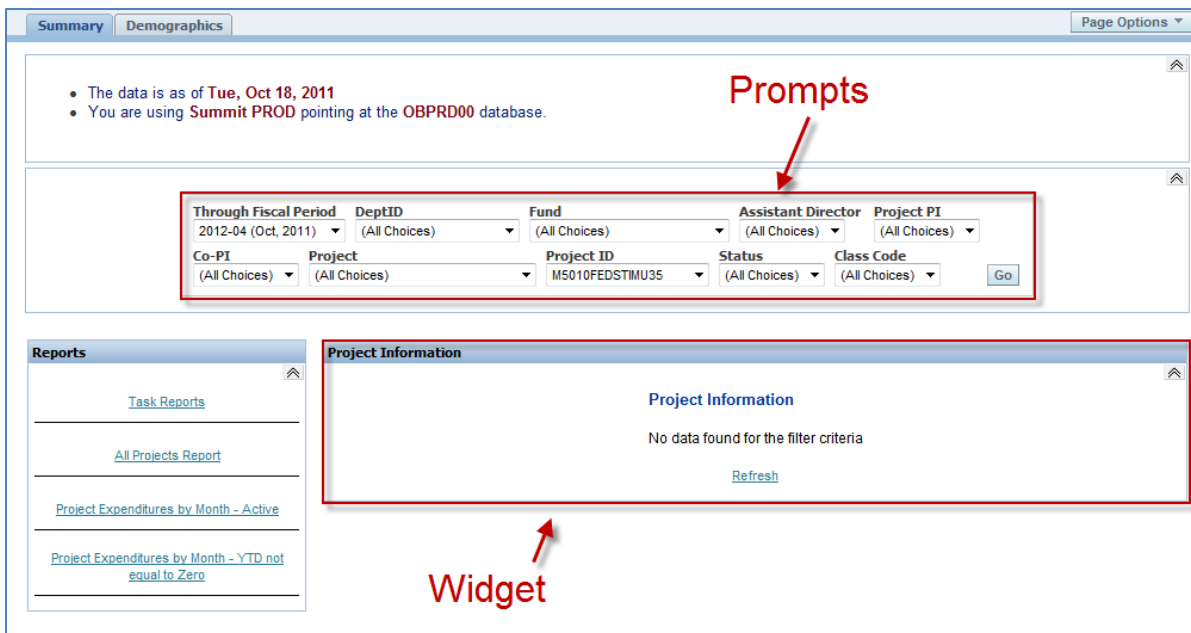
#### How do I view Dashboard information?

You can refine the data displayed in the Summary tab widgets by entering values in the Prompt fields on the Summary tab. You should select the Project ID when filling out Prompts. For step by step instructions on the recommended prompt selections, please see the Understanding the Facilities Management Dashboard job aid.

The **Summary** tab provides high-level widgets for the following activity areas:

- Project Information
- Expenditure Summary
- Procurement Summary – Open PO Lines

These widgets are displayed in table format. If prompt information does not bring back results for a widget, a message will appear that states “No data found for the filter criteria” as shown in the below example.



#### How do I drill into an activity?

The widgets on the Facilities Management Dashboard provide high-level activities and key data associated with each activity. For example, the Expenditure Summary displays a table of summarized

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financial data for those Account Groups with expenditures. Each row displays the Fiscal Month to Date, Fiscal Year to Date, Budget, Project to Date, Encumbrance, Balance, and % Remaining.

Expenditure Summary							
Account Group	Fiscal Month to Date	Fiscal Year to Date	Budget	Project to Date	Encumbrance	Balance	% Remaining
All Expenses	0.00	0.00	700,000.00	0.00	0.00	700,000.00	100.00%
Other Costs	0.00	0.00	0.00	16,644.00	0.00	(16,644.00)	
Task 20_Design Consultants	0.00	9,525.00	0.00	292,398.50	6,085.75	(298,484.25)	
Task 30_Construction	0.00	4,570.00	0.00	256,367.57	37,647.34	(294,014.91)	
Task 31_Alterations Construct	0.00	0.00	0.00	38,912.62	1,875.00	(40,787.62)	
Task 40_FF&E & On Campus Exp	0.00	3,915.30	0.00	30,550.27	8,697.14	(39,247.41)	
Task 41_Hazmat Abatement	0.00	0.00	0.00	9,358.50	450.00	(9,808.50)	
<b>All Expenses Total</b>	<b>0.00</b>	<b>18,010.30</b>	<b>700,000.00</b>	<b>644,231.46</b>	<b>54,755.23</b>	<b>1,013.31</b>	<b>0.14%</b>
<b>Total</b>	<b>0.00</b>	<b>18,010.30</b>	<b>700,000.00</b>	<b>644,231.46</b>	<b>54,755.23</b>	<b>1,013.31</b>	<b>0.14%</b>

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[Expenditure Detail - All Accounts](#)

You'll notice in the example above that the values in several of the columns are displayed in a blue font (e.g., Account Group, Fiscal Month to Date). Whenever you see values displayed in blue, you can click on that field to drill down into more detailed data about that specific activity. Below is an example of a drill down. Here the user clicked on the Task 20\_Design Consultants Account Group to view more detailed information about that Account Group.

Facilities Management - Revenue and Expenditure Detail - All Accounts			
Through Fiscal Period	DeptID	Project	Fund
2012-04 (Oct, 2011)	L300600000 - Facilities	M5010FEDSTIMU35 - FY10 Fed.Stim. Wann. FMP10-251	51425 - Internal UML Projects

Account Group	Account ID - Desc	Fiscal Month to Date Expenditure	Fiscal Year to Date Expenditure	Budget	Project to Date Expenditure	Encumbrance	Balance	% Complete
Task 20_Design Consultants	757060 - Archtictcs/Space Plan/Ldscape	0.00	0.00	0.00	116,673.15	6,085.75	(122,758.90)	
Task 20_Design Consultants	757140 - Health/Safety Experts	0.00	0.00	0.00	2,454.70	0.00	(2,454.70)	
Task 20_Design Consultants	757220 - Planners	0.00	9,525.00	0.00	173,270.65	0.00	(173,270.65)	
<b>Task 20_Design Consultants Total</b>		<b>0.00</b>	<b>9,525.00</b>	<b>0.00</b>	<b>292,398.50</b>	<b>6,085.75</b>	<b>(298,484.25)</b>	
<b>All Expenses Total</b>		<b>0.00</b>	<b>9,525.00</b>	<b>0.00</b>	<b>292,398.50</b>	<b>6,085.75</b>	<b>(298,484.25)</b>	
<b>Total</b>		<b>0.00</b>	<b>9,525.00</b>	<b>0.00</b>	<b>292,398.50</b>	<b>6,085.75</b>	<b>(298,484.25)</b>	

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### Can I print and/or download widgets within the Facilities Management 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.

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