



PeopleSoft Finance 9.2 Budgets and Financial Reports Summit 101

Budgets and Financial Reports -

- Look up the Speed types for your Department**
- Look up your budget in PeopleSoft Financials 9.2**
- Run the GL7062 and GL7045 Report**

Summit

- Look up Financial information in Summit Reporting**



What is PeopleSoft?

- **Enterprise Resource Planning system (ERP)**
- **University of Massachusetts Financial System of Record**

How do we Use it?

- **Subsystems post Financial Data to create General Ledger Entries**
- **Store and Track Budget information**
- **Lookup Our Budgets**
- **Run Financial Reports**
- **Enter Travel Authorizations and Expense Reports**
- **Pay Vendors**
- **BuyWays Purchase Orders and Invoices interface to PeopleSoft**
- **Grants are managed in PeopleSoft by SPA**



Looking up your Speed Type

A speed type is a quick reference number that stores your department ID and fund code and sponsored project(if applicable). It's used in financial transactions to determine which budget will be charged for a transaction. (Used Expense Reports, Requisitions, Purchase Orders, Invoices)

1. Open your Web Browser

2. Navigate to <https://www.umassd.edu/> and log in.

You must be logged in via single sign on in order to use the tool.

3. Go to www.umassp.edu/connect

[Operational/Project Tools](#)

4. Under Operational Project Tools choose Chartfield Lookup

• [Chartfield Lookup](#)

5. Alternatively, you may navigate to <https://www.umassd.edu/peoplesoffinance/>

Choose Chartfield and Speedtype Lookup Tool

[Chartfield and SpeedType
Lookup Tool](#)

6. Video Tutorials:

<https://www.umassd.edu/peoplesoffinance/training/videotutorials/>



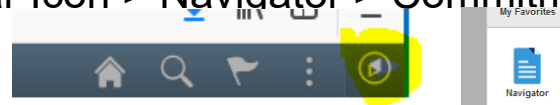
Looking up your Budget in PeopleSoft Financials

1. Open your Web Browser and Navigate to <https://www.umassd.edu/> and log in.
2. From Quick Launch go to PeopleSoft Finance. If prompted, enter your login Credentials. Logging in to PeopleSoft requires Duo Authentication. Contact the help desk if you need help with Duo.
3. Click on the General Ledger and Budget Tile > Review Budget Activity , Budget Overview or Budget Details



Or

Click on the NavBar Icon > Navigator > Commitment Control > Review Budget Activities



4. Video Tutorials: <https://www.umassd.edu/peoplesoffinance/training/videotutorials/>
5. Job Aids: <https://www.umassd.edu/peoplesoffinance/jobaids/>



Running Financial Reports

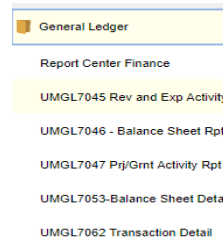
1. Open your Web Browser and Navigate to <https://www.umassd.edu/> and log in.

2. From Quick Launch go to PeopleSoft Finance.

3. Click on the Reporting Tile



4. Click on the General Ledger Folder



5. Choose the Report you wish to run. First timers Add a Run Control. The run control defines the criteria for which you are running your report.

6. Job Aids: <https://www.umassd.edu/peoplesoffinance/jobaids/>

7. Videos: None Exist at this time. But check back in the next month <https://www.umassd.edu/peoplesoffinance/training/videotutorials/>



Summit Reporting for Financials – What is it?

Oracle Business Intelligence Web Based Reporting Tool

- Updated nightly from PeopleSoft Financials- Summit data is one day behind PeopleSoft Financials
- Interactive Dashboards that allow you to create Ad hoc reports and Inquiries
- Login using your Single Sign on User ID and Password
- Requires Duo Authentication

Features

- Ability to download results to multiple Microsoft products
- Save Searches, Print results





Available Dashboards

FDM Academic Admin- *Audience Academic Departments*

Sponsored Project Funds, Fund Balance Funds, Budget Balance Funds and Non Sponsored Project Funds

FDM: Asset Management – Asset Search and Inventory

FDM Department Admin – *Audience, all*

- Budget Balance Funds, Fund Balance Funds, Non Sponsored Project Funds and Sponsored Project Funds, allows for Drilling to transaction detail level.

FDM Facilities Management - *Audience, Facilities*

Contains Finance data for Capital projects. Drill to the transaction detail level

FDM Fiscal Reporting – *Audience, All*

- Contains Finance Data to assist with month end reporting down to the account level. Revenue and Expenses(no project data), Sponsored project and Non Sponsored Project. Drill to Transaction detail

FDM Transaction Detail Analysis – *Audience, All*

Provides Transaction detail data based on prompting. Has Revenue and Expenses, Encumbrance and Budget Data by transaction type

FDM PI – *Audience PI's.*

Sponsored Project Funds, Fund Balance Funds, Non Sponsored Project Funds. Drill to the Transaction Detail level

FDM Procurement Council- *Audience Procurement Directors*


- AP and Procurement card addressable spend.



Summit Dashboards Navigation

1. Open your Web Browser and Navigate to <https://www.umassd.edu/> and log in.

2. From the UMassD QuickLaunch menu, click on Quick Reporting



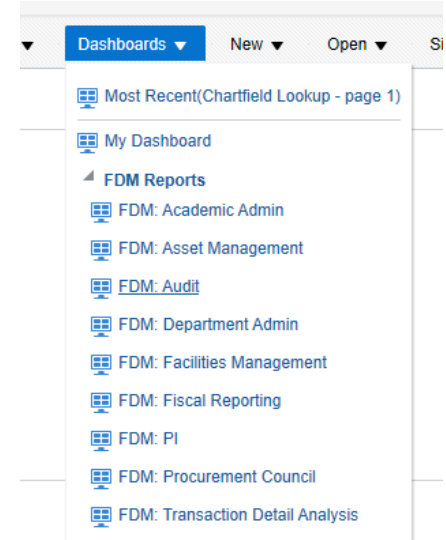
3. Summit Requires Duo Authentication – Use your single sign on user ID and password

4. Click on the Dashboards Menu and Select a Dashboard

5. The wheel icon  allows you to print, download and save searches.

6. Job Aids

<https://www.umassd.edu/peoplesoffinance/training/>





Links to Forms and Other Useful Information

1. **Security Forms – This must be filled out and signed by your manager to gain access to the PeopleSoft and Summit**
<https://www.umassd.edu/peoplesoffinance/forms/>
Choose User Access Security Form
2. **Procurement Forms and Resources**
https://www.umassd.edu/admin_finance/departments/administrativeservices/purchasing/formsresources/
3. **Budget Contact: Questions about Budgets and Budget Errors**
Jillian George x8165, AnneMarie Currie x8023
4. **Security Setup – ITHELP@umassd.edu** (If form has been submitted to Controller)
5. **PeopleSoft Finance, Summit Finance, BuyWays, Terra Dotta: Training, Errors and How to Questions**
Jean Schlesinger x8085
6. **Financial Systems Web Page: <https://www.umassd.edu/peoplesoffinance/>**