





SUMMIT Dashboards

Introduction and Navigation

Topic	Description
<p>What are Dashboards?</p>	<ul style="list-style-type: none"> • Dashboards are intended to provide decision-makers with an understanding of relevant data in support of the business operations. It tracks key performance indicators and provides warnings, action alerts and next steps when areas of the business fail to meet pre-determined metrics. • An effective Dashboard is integrated with visual analytics to provide a single tool for rapid, insightful decision making.
<p>What are Widgets?</p>	<ul style="list-style-type: none"> • Widgets are presentations of data within a Dashboard. Data within a widget may be presented as an alert, in graphical and/or table format. Widgets can be customized based upon the business question it is intended to answer. Widgets can present data in multiple views i.e. pie graph, bar graph or line graph.
<p>How to Log In to SUMMIT Dashboards</p> <p> Reminder: Your logon to SUMMIT is the same as your PeopleSoft ID and password.</p> <p> Note: User ID's and Passwords are case sensitive.</p>	<ol style="list-style-type: none"> 1. Navigate to the SUMMIT URL. https://appsprdsummit-inside.umassadmin.net/analytics/saw.dll?Dashboard 2. Enter your User ID and Password. 3. Click the <i>Log In</i> button. <div data-bbox="641 1444 1219 1696" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <p style="text-align: center;">SUMMIT</p> <p style="text-align: center; font-size: small;">Please enter your User ID and Password below, and then press the Log In button.</p> <p style="text-align: center;">User ID <input style="width: 100px;" type="text"/></p> <p style="text-align: center;">Password <input style="width: 100px;" type="password"/></p> <p style="text-align: center;"><input type="button" value="Log In"/></p> </div>

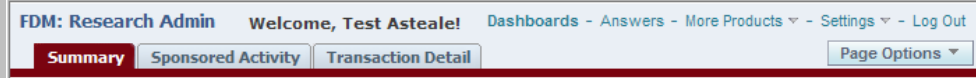
Basic Navigation





Reminder:
A Dashboard is a screen that presents data content. Dashboards are a set of widgets that display information based upon filtered values and user security.

1. Upon logging into SUMMIT, a default dashboard will appear on the screen. A list of other dashboard links may appear based on your role/security.
 - Examples: FDM: Academic Admin, FDM: Research Admin



2. Below the blue header are the current dashboard page tabs.

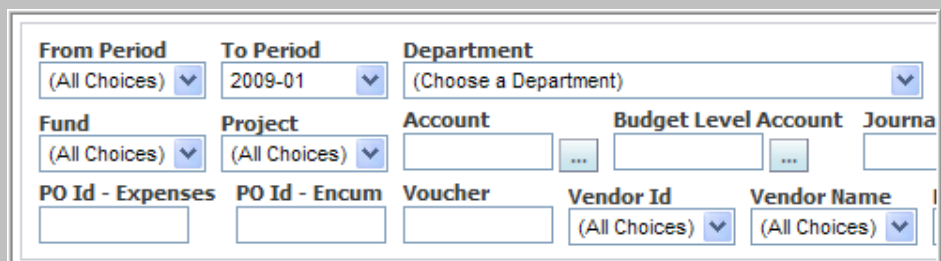



3. To the far right side you will see a Page Option drop down box. The Page Options drop down allows the end user to further customize the pages.
4. There are many ways to Navigate within the Dashboard, for example:
 - Links on the blue header bar
 - Folder tabs above the dashboard page
 - Prompts on the top of each dashboard page
 - Return link on drilled pages
5. The drop down box  allows for selection of different values or views.
6. The collapse button  allows for the widget to be hidden. Clicking the expand button  will display the section.
7. There are two icons present at the bottom left of each dashboard that allow you to refresh or print the page. 
 - Refresh will resend the request to update the data on the page
 - Print will prompt you to select PDF or HTML output and open a new browser window to print the contents


Prompts

Prompts are used to set filter values that apply to a dashboard page or widget.


1. Prompt boxes appear at the top of each dashboard. Further options may appear within a widget window. There are three types of prompts
 - Drop down – list (e.g., From Period, To Period)
 - Search and select (e.g., Account, Budget Level Account)
 - Entry box (e.g., PO Id – Expenses, Voucher)



 **Click the Go button to apply prompt values.**

The bottom right of the prompt section contains the 'Go' button  that will apply the prompt selections to the page.

Using Prompts – Drop Down Lists

 **To modify search criteria to display all results, you will have to set values to blank or set drop down filters to All Choices. Then click Go to return all values.**

1. The default value for drop down filter boxes is “(All Choices)”

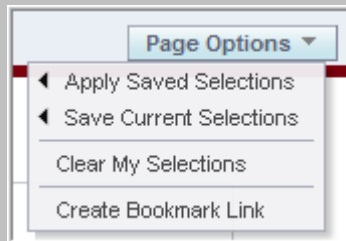
(All Choices) ▼
2. This option displays all filter values that correspond with department level security.
3. You can select specific filter values from the drop down list and save them for future reference. See the Using Prompts – Saving Filter Values for further explanation.

**Using Prompts
– Setting and
Saving Default
Filter Values**

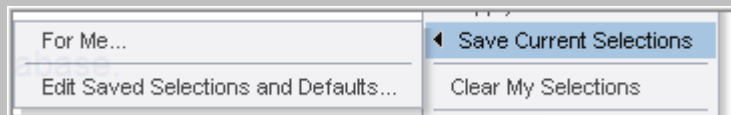
1. Users can save filter values to speed the display of information commonly used. A default setting allows saved filter prompts to return when that page is selected.

Before saving filters prompts you must first enter the prompts then hit the “Go” button.

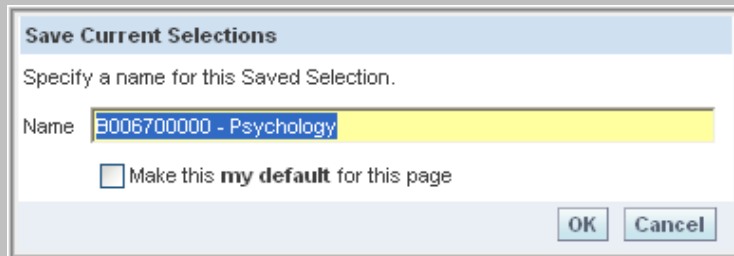
2. Click the Page Options tab



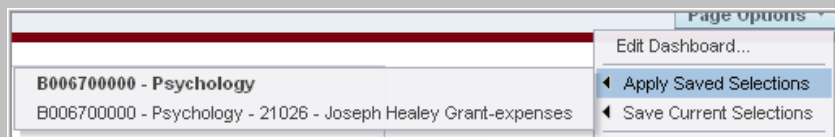
3. Select the Save Current Selections option
4. Select the For Me... option



5. The Save Current Selections window will open and present the Name for the saved selection. You may overwrite this description or leave the default description.



6. Click the Make this my default for this page if you want to set this selection as the default filter set for this page.
7. You do not have to set a default filter selection for this page. No default will return all values based on department level security.
8. To apply the saved filter prompts, select the Page Options, click on Apply Saved Selections.



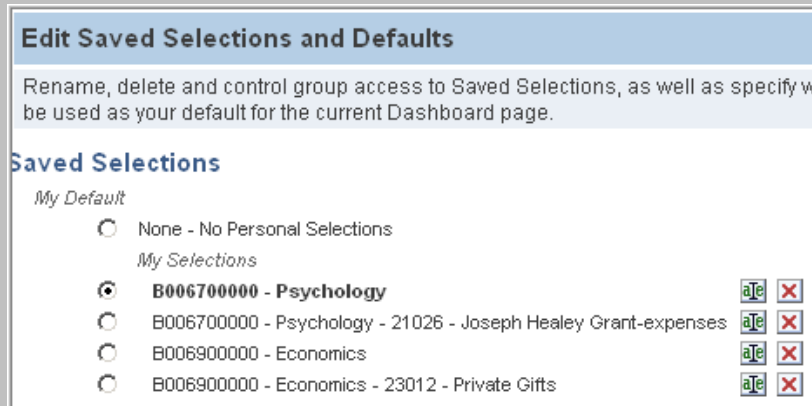
9. Select the saved filter selection to apply to the dashboard. If you have set a default for this page, it will appear in bold.

Alert:
Default page filter Saved Selection values can only be set on the Summary Page .

Alert:
If a secondary page is set with a default value in the Saved Selections settings, configuration values will not be passed properly between the pages.

**Using Prompts
 – Clearing or
 Modifying
 Saved Filter
 Values**

1. Users can modify a default saved selection to another value or to remove the default setting completely.
2. Click the Page Options tab.
3. Select None-No Personal Selections to clear a previously set default value. This value must be set for all secondary Dashboard pages. Only the Summary page can contain a page default saved selection.
4. Click the radio button to select another saved selection if you would like to change the existing default (currently indicated by the radio button).



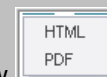
5. To remove a selection, click on the “X” to delete.
6. Click OK to save the filter value or Cancel to exit without saving the modification.

**Printing
 Widgets**


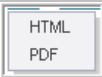








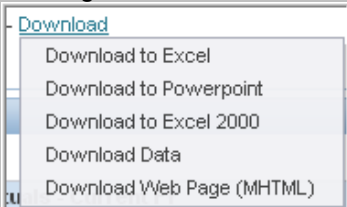
1. At the bottom of each widget is a set of links that allow printing, downloading or refreshing of data in this section.



2. The print link is the middle link

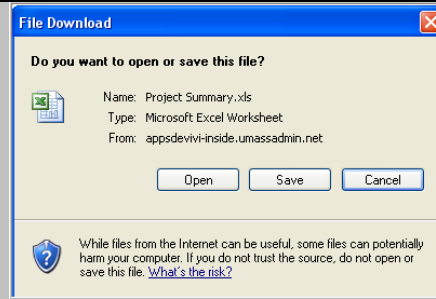


3. There is an option to print to PDF or HTML view
4. HTML option will open a new window that can be printed (using the print function of the browser) with the content of the widget
5. PDF option will open a new window that displays the PDF file inside your browser. You can print or save the file for your records.

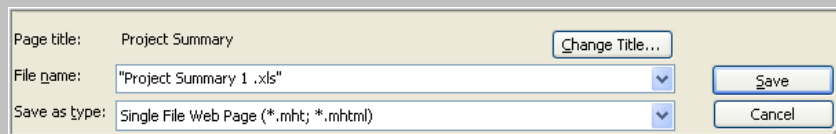
<p>Printing Current Dashboard Page</p>	<ol style="list-style-type: none"> To print the current view of the current dashboard, scroll to the bottom of the window and select the middle print icon from the group of 3 on the left hand side  There is an option to print to HTML view or PDF  HTML option will open a new window that can be printed (using the print function of the browser) with the content of the widget PDF option will open a new window that displays the PDF file inside your browser. You can print or save the file for your records.
<p>View Additional Data Within a Table</p> <p> <i>The summary pages displays 10 records at once and the detail pages display 25 records.</i></p>	<ol style="list-style-type: none"> In a table display of data, if there is more than 10 rows on the Summary page and 25 rows on a detail page, there will be navigation arrows to retrieve additional data.  To navigate to the next set of records, click on the right arrow.  To display all records, click the right arrow with asterisk button.  To navigate back one set of records, click on the left arrow.  To navigate to the beginning of the results set, click the left arrow with the vertical line button. 
<p>Downloading Data to Excel</p> <p> <i>Selecting the Download to Excel link will include table formatting, including grid lines and shading.</i></p>	<ol style="list-style-type: none"> At the bottom of each widget, there is a set of 3 links. The right most link is the Download link.  Clicking on the Download link will bring up a menu of download choices.  Select a download option. When downloading to Excel, you will receive a window that asks if you want to open or save the requested file.

Hint: Use the Download Data option if you do not want to include the formatting of the data elements. This option is best if you are planning on additional sorts or cutting and pasting to other sections in Excel.

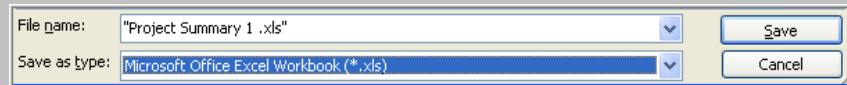
Once the download is complete, you may need to close a blank browser window that was used during the data transfer.



4. Click Save if you want to save the file to your computer as a Microsoft Excel Workbook file. The filename will be the "widget title name".xls (e.g., Project Summary.xls). Please make note of the directory where the file is saved.
5. Click Open to preview the data in a new browser window in Excel Workbook format. To save the file to your computer, use the File > Save As function of your window.



6. You must change the file type from Simple File Web Page to Microsoft File Excel Workbook (*.xls) to open in Excel.



- 7.

Confirm the Save In: directory, then click Save.

Email SUMMIT Output Files

You can also download the data to Excel and email the xls workbook file.

Files must be emailed outside of SUMMIT using your desktop email program.

1. Dashboard content or download files can be emailed as attachments.
2. Print the page or widget to PDF or HTML or download data to Excel and save the file to a location of your choosing.
3. Using your email program, attach the file(s) to your email message.



Reset Password

Note:
If you have been assigned a new PeopleSoft ID, you need to change your password in PeopleSoft before you can login to SUMMIT.

- Navigate to the PeopleSoft Finance Reporting v8.9 URL.
<https://fin-rptg.umassadmin.net/psp/fsrptg89//fsrptg89>

- Reset your PeopleSoft password using the instructions on the PeopleSoft password management page.
- You will be able to login to SUMMIT the next business day.



password management

Change Password

Username: _____

You need to reset your password for one of the following reasons:

- this is the first time you've logged in with your new user id and password, or
- the system has forcibly expired your old password after 180 days as a routine security measure, or
- you have forgotten your password or locked your account after 5 invalid logon attempts and are using the Forgot Password Functionality, or
- an administrator has directed you to this site to have you change your password

Finance v7.5 and Human Resources v7.6 users: The Finance and Human Resources systems will only allow an 8 character password to be used. If you use the same password for all your access please make sure you enter only an 8 character password on this page or you may end up locking your Finance and/or Human Resources operator ids.



Reset Password
(continued)

To change PeopleSoft and SUMMIT password, follow the steps below.

1. Input Old Password
2. Enter New Password
3. Enter Confirm Password
4. Click Change Password button

Secure Password Requirements are listed on the PeopleSoft Password Management screen.

Note:
You will be able to login to SUMMIT the next business day.

<p>Secure Password Requirements :</p> <ul style="list-style-type: none"> ■ Passwords MUST be a minimum of 8 characters ■ Your password cannot contain a portion of your name ■ Your password cannot be the same as your User ID ■ You cannot use any of your previous 24 passwords as the system retains a password history ■ Your password must follow three of the following four rules 		<p>PASSWORD:</p> <p>Old Password: <input type="text"/></p> <p>New Password: <input type="text"/></p> <p>Confirm Password: <input type="text"/></p>
<p>Rule:</p> <ol style="list-style-type: none"> 1. Include an English uppercase character: 2. Include an English lowercase character: 3. Include a number (0-9): 4. Include a special character (!@#%\$&*): 	<p>Example:</p> <p>BlueShoes#2</p> <p>FUnSun@1</p> <p>3GreenTree@</p> <p>Friedegg4%b</p>	<p><input type="button" value="Change Password"/></p> <p><input type="button" value="Forgot Password"/></p>
<p>You must not use any of the examples above as a password.</p>		

Passwords should be difficult to guess. User IDs, names, birth date, employee or social security number, repeating characters (e.g., 111111 or ababab), common character sequences (e.g. "123456" or "abcdef"), or common words that can be found in a dictionary **should not** be used. Additionally, passwords should not be personally related (e.g., favorite sports team, name of child or spouse, pets name, etc).

Please note that sharing or giving anyone else permission to use your operator IDs or passwords is prohibited. The storing of passwords in batch files, in automatic login scripts, in terminal function keys, in computers without access control or in other locations where another person might discover them is prohibited. Violation of these University standards may result in loss of access or other disciplinary action.