

Logging in to Summit

Secure Access Login

Campus User ID:

Password:

Campus:

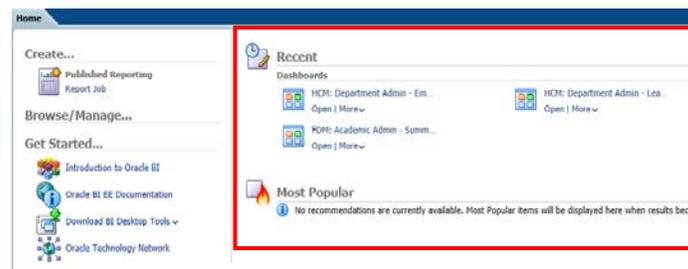
Forgot Password? | Need Help?

1. Navigate to the Summit application.
2. Enter your **Campus User ID**. The Campus User ID is the same as the campus account name you use to log in to your UMass e-mail and/or computer.
3. Enter the password affiliated with your campus account into the **Password** field.
4. Select your campus in the **Campus** dropdown list.
5. Click the **Login** button.

Summit Home

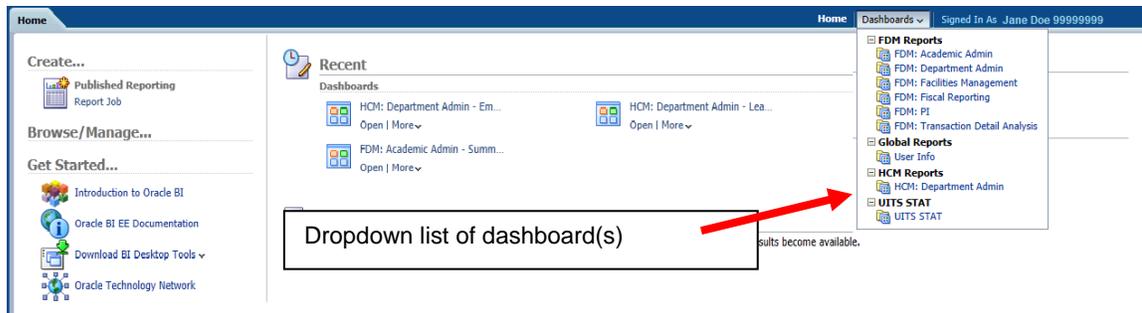
Home
Dashboards ▾
Signed In As
Jane Doe 9999999

Your user information will display when you first log in to Summit, including your **Display Name** and **User ID**. If you encounter issues in the system, an Administrator may ask you to check this info so he/she can provide you with more support.



The home page will also display your most recent dashboards and most popular recommendations.

Understanding Your Dashboard(s)



Dropdown list of dashboard(s)

Dropdown List

You can navigate back and forth between dashboard(s) by using the **Dashboards** dropdown list at the top of the page.

Alerts

A dashboard may contain an **Alerts** section. **Alerts** can be critical and emerging issues that demand immediate attention. Pro-active and event-based **Alerts** notify the decision-makers where corrective action may be needed.

Widgets

When you navigate to a dashboard, you will see a series of widgets that may be in chart and/or table format. The type of widgets will vary based on the dashboard or tab to which you have navigated.

- Some widgets contain prompts so you can make changes and rerun the widget.
- Others do not have prompts; therefore, you should return to the main dashboard page and run the widget again if new filter criteria is required.

Dashboard Prompt Overview



Key Prompt Buttons

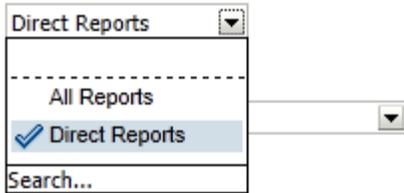
- ❖ **Apply:** Use the Apply button to refresh the dashboard based on the prompts you have entered.
- ❖ **Reset:** Once you complete a search, you can use the Reset button to reset your Prompt Selections

The Prompt Types

(1) Dropdown Single Select

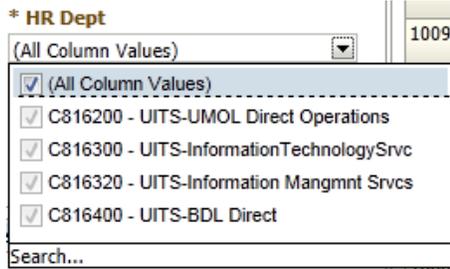
The dropdown list will allow you to either select single choices

Reporting Group



(2) Dropdown Multi-Select

or multiple choices based on the constraints and available values for each list.



Saving a Prompt Value Selection

Summit allows you to save your most frequently used prompt selections.

1. Select the appropriate prompt values.
2. Click the **Apply** button to refresh the dashboard.
3. Click the **Page Options**  icon button in the top right corner of the dashboard.
4. Click the **Save Current Customization** item.
5. Click the **Save For Me...** item.

Important: Any default Date fields will be saved as part of the saved selection. After accessing a saved selection, you should change the date prompt value before pressing the Apply button.

Using Saved Selections

1. Click the **Page Options** icon button.
2. Click the **Apply Saved Customizations** item.
3. Click the selection you want to view.

Accessing Widgets

Using View Selectors

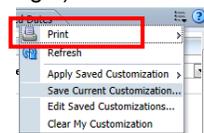
Some widgets contain **View Selectors** (displayed as a **Select view** dropdown list). The **Select view** dropdown list allows you to select different ways in which to view data for a specific widget.

Drilling into a Widget

Some widgets contain columns with hyperlink values. These hyperlinks allow you to drill down and view more detailed data within a widget.

Downloading & Printing Widgets

- ❖ At the bottom of each widget, click the **Export** link to export to a PDF, Excel, etc.
- ❖ Click the **Page Options** icon (top right) to **Print** the entire page .

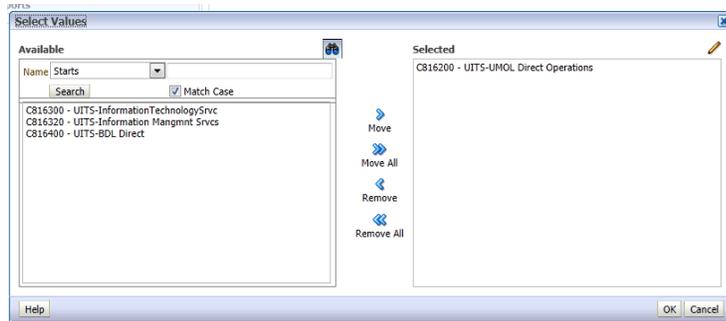


The Prompt Types continued

(3) Search...

Search...

When you click the **Search** link, a Select Values prompt window opens.



You can select more than one value from the available values in the prompt list box.

- ❖ Double click a value or use the **>** button to move a selected value in the **Available** column to the **Selected** column and the **<** button to remove a value from the Selected column. Use the **Ctrl** key to choose more than one value in the list to move to the **Selected** column.
- ❖ Use the **>>** or **<<** buttons to move the whole set of values from one column to another.

You can search for specific values by using the dropdown list functionality in the **Available** column and then clicking the Search button.

- ❖ Use the dropdown list to select a match type (e.g., starts, contains, ends).

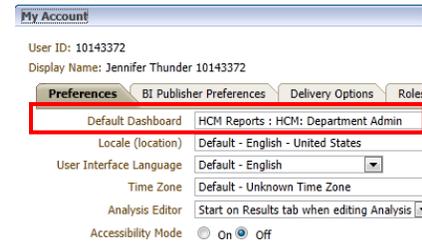
Setting a Dashboard as the Home Page Default

You can save your most commonly used Dashboard as the default on your Home page.

1. Click the arrow dropdown next to your user name at top right of page
2. Click **My Account**



3. Click the **Default Dashboard** dropdown list in the Preferences section.



4. Select the **Dashboard** you want to default on your home page.
5. Click the **OK** button at the bottom of the **My Account** page.
6. You will need to log out, close your browser, and then log back in so your home page can refresh with your new default settings.