

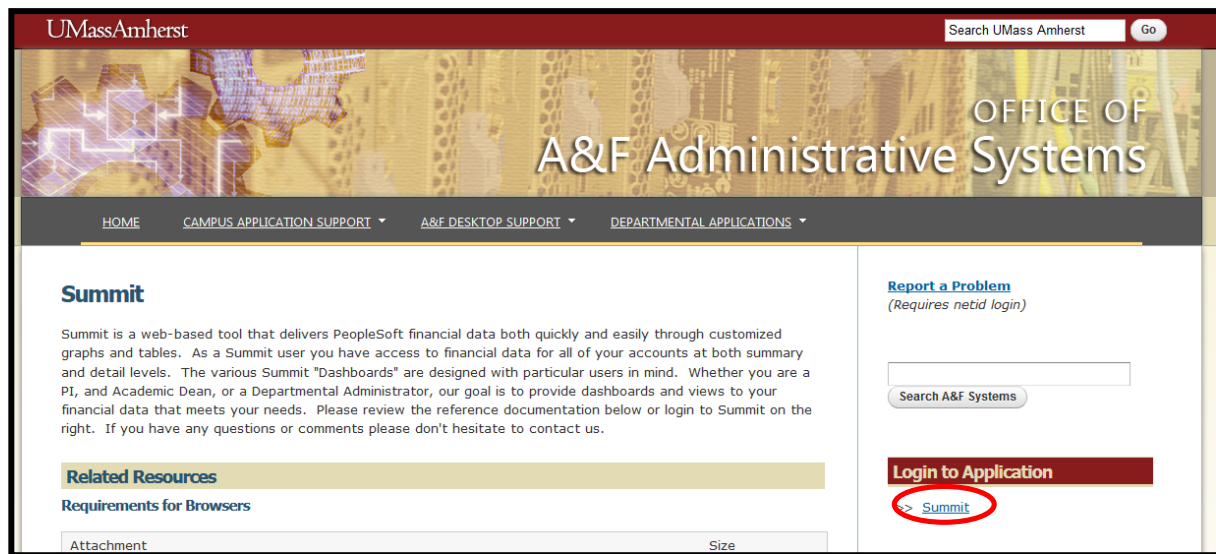
# Summit – The Basics

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Summit is the university's financial database system. All financial transactions are recorded and organized here.

## Logging On:

Go to <https://www.umass.edu/afsystems/summit>, and follow the application link



You will get to a login screen where you should enter your SPIRE ID and Password. Remember to specify the Amherst Campus.

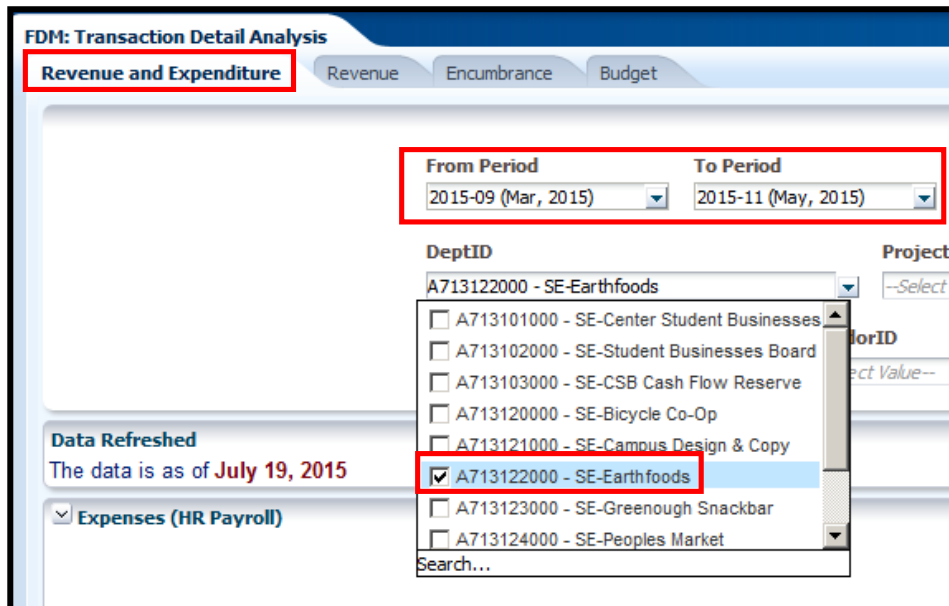
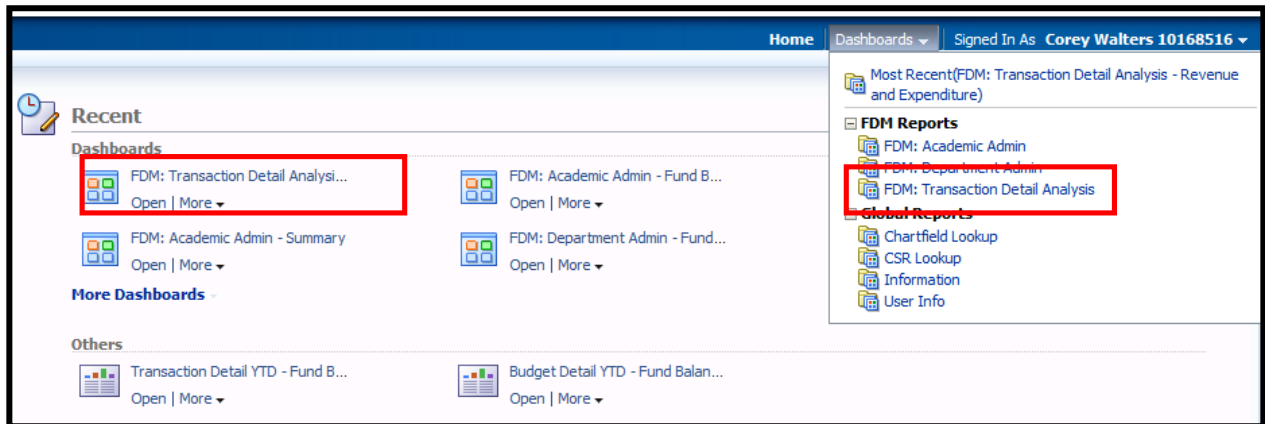
The 'Secure Access Login' form contains the following elements:

- Campus User ID:** A text input field.
- Password:** A text input field.
- Campus:** A dropdown menu with the option 'Choose Campus ...'.
- Login:** A button to submit the form.

If you can't login or Summit shows no information, contact the Administrative Coordinator or Director so the appropriate permission forms can be completed.

## Basic Use:

Summit is organized into functions called Dashboards, each with different display options. For almost all use, you will use the Transaction Detail Analysis dashboard, Revenue and Expenditure view. You will select a date range and grad assistants will select a business in DeptID (Consultants will be limited to their own business).



Hit  and all of the categories should populate.

## Categories and What They Mean:

Expenses (HR Payroll)

Payroll is mostly self-explanatory. It is organized alphabetically by co-manager.

Expenses (Accounts Payable, Procard)

This category is anything you've purchased with a PO or Procard, or anything from a vendor outside of the University. Originally organized by Account Code, it may be more useful to sort by Vendor ID or Amount.

Expenses and Transfers Out (External)

As much as this category is called External, it really refers to transactions applied within UMass, outside of Student Affairs. For example: UCard Fees, Phone Charge, Student Farm, MICROS.

Expenses and Transfer Out (Other Sources)

These are the transactions within Student Affairs such as printing at CD&C, BoSB dues, and credit card fees. Full costing is also accrued here, but the description will read AO\_Bus\_CFSs\_not\_SATF\_CFS because, why just write 'full costing' when you could come up with something much longer and more confusing.

Revenue and Transfers In

Ok, here's where it gets weird. First I would sort by Line Description, so you can organize transactions by source (hopefully). Here is how a source might match a description:

- **Cash** – A cash transaction is often described simply by the date on the deposit slip, but sometimes with a modifier such as the business name, or the day of the week. e.g. 4/22/2015, FRIDAY 4/22/2015, CD&C 4/22/2015

- **Credit Cards** – All credit card transactions are described as **Cash Management**.
- **UCard and YCMP** – These transactions only show up in Summit as an aggregation of usually a month of transactions. However the start and end dates of each transaction are not recorded.
- **Recharges** – Whether for **Catering** or **RSO/Departmental Sales** these transactions should show up under the name of the organization.

**Tips and Usability:**

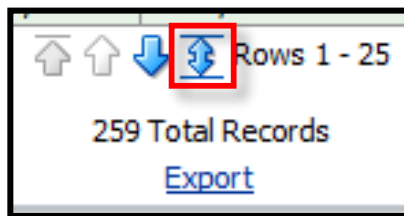
Here are some basic issues of functionality that will make Summit easier.

**Expand:** Each category will automatically only show the 25 most recent entries. Use the arrow tool at the bottom of the category to expand to show all of the transactions for the time period.

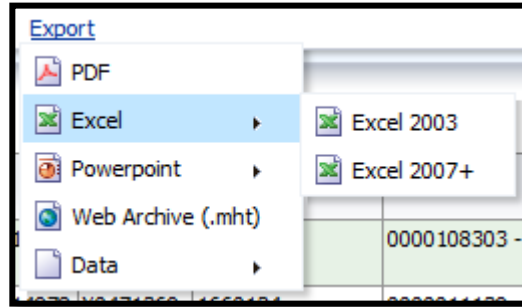
Expenses (HR Payroll)

Transaction Type	Account	Account Description	Fund Code	DeptID	Project ID	Program Code	Class	Journal ID	Journal Date	Employee Name	Employee ID	Employee Record	Pay End Date	Earnings Begin Date	Earnings End Date	Earnings Code	Hours Worked	Amount
Payroll	730015	Contracted Student Interns-CCS	51119	A713124000	N/A	E07		PAY3083980	5/8/2015	Add, Sarah Patricia	10160601	2	5/2/2015	4/26/2015	5/2/2015	ASH	14.00	126.00
Payroll	730015	Contracted Student Interns-CCS	51119	A713124000	N/A	E07		PAY3081311	4/24/2015	Add, Sarah Patricia	10160601	2	4/18/2015	4/5/2015	4/18/2015	ASH	21.00	189.00
Payroll	730015	Contracted Student Interns-CCS	51119	A713124000	N/A	E07		PAY3078988	4/10/2015	Add, Sarah Patricia	10160601	2	4/4/2015	3/22/2015	4/4/2015	ASH	20.00	180.00
Payroll	730015	Contracted Student Interns-CCS	51119	A713124000	N/A	E07		PAY3079460	3/27/2015	Add, Sarah Patricia	10160601	2	3/21/2015	3/8/2015	3/14/2015	ASH	18.00	162.00
Payroll	730015	Contracted Student Interns-CCS	51119	A713124000	N/A	E07		PAY3074000	3/13/2015	Add, Sarah Patricia	10160601	2	3/7/2015	2/22/2015	2/28/2015	ASH	16.00	144.00
Payroll	730015	Contracted Student Interns-CCS	51119	A713124000	N/A	E07		PAY3071513	2/27/2015	Add, Sarah Patricia	10160601	2	2/21/2015	2/8/2015	2/21/2015	ASH	35.50	319.50
Payroll	730015	Contracted Student Interns-CCS	51119	A713124000	N/A	E07		PAY3069270	2/13/2015	Add, Sarah Patricia	10160601	2	2/7/2015	1/25/2015	1/31/2015	ASH	14.50	130.50
Payroll	730015	Contracted Student Interns-CCS	51119	A713124000	N/A	E07		PAY3061150	12/19/2014	Add, Sarah Patricia	10160601	2	12/13/2014	11/30/2014	12/6/2014	ASH	10.75	86.00
Payroll	730015	Contracted Student Interns-CCS	51119	A713124000	N/A	E07		PAY3058826	12/5/2014	Add, Sarah Patricia	10160601	2	11/29/2014	11/16/2014	11/29/2014	ASH	16.75	134.00
Payroll	730015	Contracted Student Interns-CCS	51119	A713124000	N/A	E07		PAY3056718	11/21/2014	Add, Sarah Patricia	10160601	2	11/15/2014	11/9/2014	11/15/2014	ASH	8.50	68.00
Payroll	730015	Contracted Student Interns-CCS	51119	A713124000	N/A	E07		PAY3054536	11/7/2014	Add, Sarah Patricia	10160601	2	11/1/2014	10/19/2014	11/1/2014	ASH	24.50	196.00
Payroll	730015	Contracted Student Interns-CCS	51119	A713124000	N/A	E07		PAY3052020	10/24/2014	Add, Sarah Patricia	10160601	2	10/18/2014	10/5/2014	10/18/2014	ASH	28.00	224.00
Payroll	730015	Contracted Student Interns-CCS	51119	A713124000	N/A	E07		PAY3049649	10/10/2014	Add, Sarah Patricia	10160601	2	10/4/2014	9/21/2014	10/4/2014	ASH	44.00	352.00
Payroll	730015	Contracted Student Interns-CCS	51119	A713124000	N/A	E07		PAY3047096	9/26/2014	Add, Sarah Patricia	10160601	2	9/20/2014	9/7/2014	9/20/2014	ASH	40.00	320.00
Payroll	730015	Contracted Student Interns-CCS	51119	A713124000	N/A	E07		PAY3069270	2/13/2015	Bada, Nicole Elizabeth	10158959	2	2/7/2015	1/25/2015	2/7/2015	AWIS	25.82	232.37
Payroll	730015	Contracted Student Interns-CCS	51119	A713124000	N/A	E07		PAY3067194	1/30/2015	Bada, Nicole Elizabeth	10158959	2	1/24/2015	1/18/2015	1/24/2015	AWIS	2.18	19.58
Payroll	730015	Contracted Student Interns-CCS	51119	A713124000	N/A	E07		PAY3061150	12/19/2014	Bada, Nicole Elizabeth	10158959	2	12/13/2014	11/23/2014	12/13/2014	AWIS	10.50	84.00
Payroll	730015	Contracted Student Interns-CCS	51119	A713124000	N/A	E07		PAY3058826	12/5/2014	Bada, Nicole Elizabeth	10158959	2	11/29/2014	11/16/2014	11/22/2014	AWIS	5.85	46.80
Payroll	730015	Contracted Student Interns-CCS	51119	A713124000	N/A	E07		PAY3056718	11/21/2014	Bada, Nicole Elizabeth	10158959	2	11/15/2014	11/2/2014	11/15/2014	AWIS	11.70	93.60
Payroll	730015	Contracted Student Interns-CCS	51119	A713124000	N/A	E07		PAY3054536	11/7/2014	Bada, Nicole Elizabeth	10158959	2	11/1/2014	10/19/2014	11/1/2014	AWIS	12.75	102.00
Payroll	730015	Contracted Student Interns-CCS	51119	A713124000	N/A	E07		PAY3052020	10/24/2014	Bada, Nicole Elizabeth	10158959	2	10/18/2014	9/28/2014	10/18/2014	AWIS	15.75	126.00
Payroll	730015	Contracted Student Interns-CCS	51119	A713124000	N/A	E07		PAY3049649	10/10/2014	Bada, Nicole Elizabeth	10158959	2	10/4/2014	9/21/2014	9/27/2014	AWIS	4.80	38.40
Payroll	730015	Contracted Student Interns-CCS	51119	A713124000	N/A	E07		PAY3083980	5/8/2015	Bada, Nicole Elizabeth	10158959	3	5/2/2015	4/19/2015	5/2/2015	ASH	39.50	355.50
Payroll	730015	Contracted Student Interns-CCS	51119	A713124000	N/A	E07		PAY3081311	4/24/2015	Bada, Nicole Elizabeth	10158959	3	4/18/2015	4/5/2015	4/18/2015	ASH	32.50	292.50
Payroll	730015	Contracted Student Interns-CCS	51119	A713124000	N/A	E07		PAY3078988	4/10/2015	Bada, Nicole Elizabeth	10158959	3	4/4/2015	3/22/2015	4/4/2015	ASH	34.00	306.00

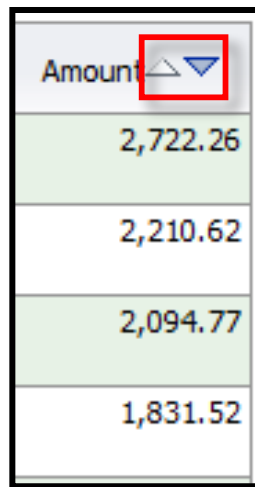
Rows 1 - 25  
259 Total Records  
Export



**Export:** You can export a given category to Excel if you want to manipulate the data, or get rid of some of the superfluous categories.



**Sort:** You can sort an entire category by a field heading. When you hover your mouse over the heading two arrows will appear. The 'up' arrow sorts from smallest to largest, and the 'down' arrow sorts from largest to smallest.



### Other Useful Information:

- The Journal Date heading refers to the date that the transaction **entered Summit** not the date that it occurred. Sometimes transactions take days or months to process, so sorting by Journal Date will not show chronological events.
- For a full description of what each of the headings in each category means, please consult the [University Accounts Glossary](#).