PO OPEN ENCUMBRANCE DASHBOARD SETUP

The PO Open Encumbrance Dashboard allows users to view purchase order open encumbrances. The data produced is the same as the Open Encumbrance as of Accounting Period report. The dashboard functionality is similar to the Department Manager Dashboard offering drill down capability into purchase order information.

Department and Project level security are two of the features of the dashboard and allow users to have access only to departments and/or projects for which they are granted authorization.
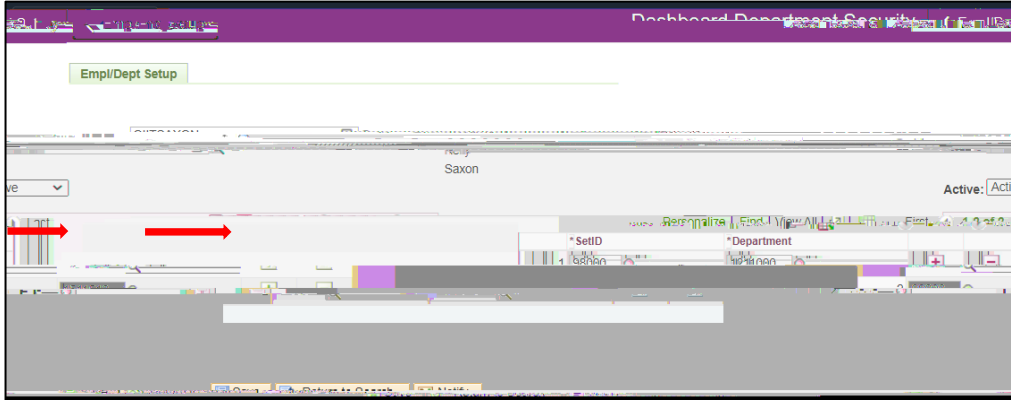
Setting U p Dashboard Security

The local Security Administrator shboall departments in the PO Open Encumbrance Dashboard for their institution.

x BOR_PO_SELECT_DEPT_ACCESS: Gives users access only to the departments they manage in the PO Open Encumbrance Dashboard.

x BOR_PO_ALLPROJECT_ACCESS: Gives users access to all projects in the PO Open Encumbrance Dashboard for their institution.

x BOR_PO_SELECT_PROJECT_ACCESS: Gives users access only to the projects they manage in the PO Open Encumbrance Dashboard.

With these security roles, Department and/or Project level security will also need to be added via PeopleTools > Security > User Profiles > Dashboard Department Security or Dashboard Project Security

Below are step by step instructions for the local Security Administrator to add Department and/or Project level security for a user:

Step	Action
1.	Click the NavBar icon.
2.	Click the Navigator icon.
3.	Click the PeopleTools link.
4.	Click the Security link.
5.	Click the User Profiles link.
6.	Click the Dashboard Department Security link. The system navigates to the Department Setup page.
7.	Enter or search for the users User ID.
8.	Enter the user's SetID and Department in the designated columns. *Note*: If a user has access to more than one department, click the plus (+) button and enter the SetID and second department.
9.	When all departments are entered click Save.
10.	For Project level security, click the Dashboard Project Security link. The system navigates to the Project Setup page.
11.	Enter or search for the users User ID.

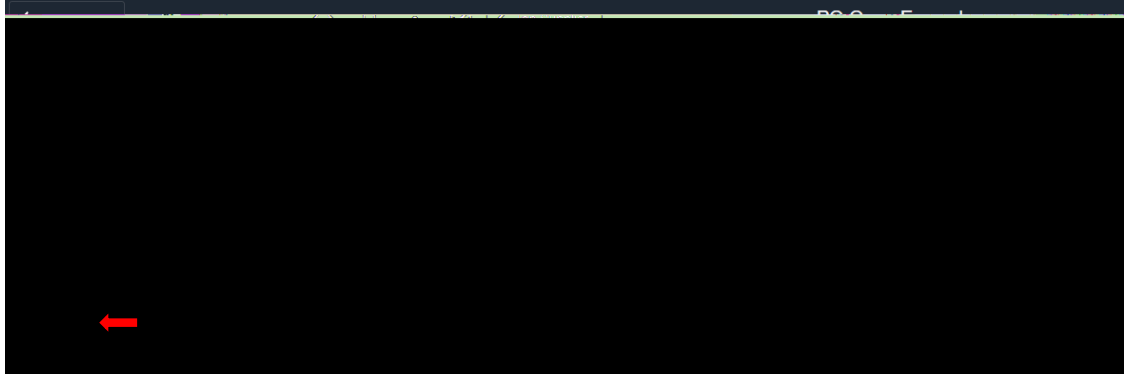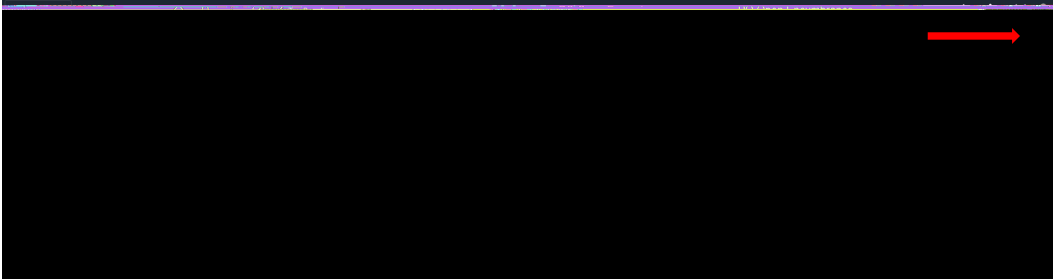| Step	Action
12.	Enter the user's Business Unit and Project in the designated columns. ***Note***: If a user has access to more than one project, click the plus (+) button and enter the Business Unit and second project.

Defining User's Business Unit

The first time users open the dashboard, their business unit defaults to 97000. As a result, users need to define their business unit before working with the dashboard. Once the following steps are complete, the business unit defaults to the user's institution each time the user enters the dashboard.

Below are step by step instructions on how to set up a user's default business unit.

Step	Action
1.	Click the NavBar icon.
2.	Click the Navigator

Step	Action
9.	Click Search to populate the data for the selected business unit.
10.	Click the Options Icon. A drop down menu appears.
11.	Click Save. The Dashboard is now ready for use.