

# Department Manager Dashboard Setup

The Department Manager Dashboard is new functionality that will allow department managers to view financial data, including budgets, pre-encumbrances, encumbrances, expenses, as well as the details behind these numbers, in one location.

Department level security is one of the features of the dashboard and will allow users to only have access to the departments for which they are granted authorization.

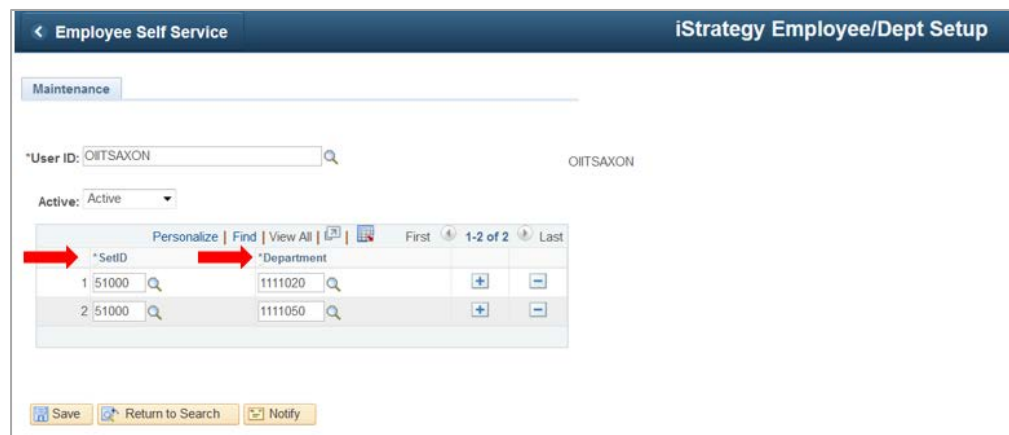
## Setting up Dashboard Security

The local Security Administrator is responsible for assigning a user's security roles. Users will need one of the following security roles to access the dashboard:

- BOR\_GL\_ALLDEPT\_ACCESS: Gives users access to all departments for their institution
- BOR\_GL\_SELECT\_DEPT\_ACCESS: Gives users access only to the departments they manage

With this security role, Department-level security will also need to be added via **PeopleTools > Security > User Profiles > iStrategy Department Security**.

1. Enter the user's SetID and Department ID in the designated columns. If a user has access to more than one department, click the add button and enter the SetID and second department.
2. When all departments have been entered, click **Save**.



The screenshot shows the 'iStrategy Employee/Dept Setup' page. At the top, there's a header with 'Employee Self Service' and 'iStrategy Employee/Dept Setup'. Below that, a 'Maintenance' tab is selected. The user ID is 'OITSAXON'. The 'Active' status is 'Active'. There's a table with two columns: 'SetID' and 'Department'. The table has two rows: Row 1 with SetID '51000' and Department '1111020'; Row 2 with SetID '51000' and Department '1111050'. Red arrows point to the 'SetID' and 'Department' columns. At the bottom, there are buttons for 'Save', 'Return to Search', and 'Notify'.

## Define User's Business Unit

The first time users open the dashboard, their business unit will default to 98000. As a result, user's will need to define their business unit before working with the dashboard. Once the following steps have been completed, the business unit will default to the user's institution each time the user enters the dashboard.

The following steps need to be completed for both the expenses and revenue dashboards.

Navigation: **NavBar > BOR Menus > BOR General Ledger > Department Manager Expenses or Department Manager Revenue**

1. Click the **Show Filters** tab.



Employee Self Service Department Manager Expenses

Pivot Grid  
Press hold icon and drag and drop to column or row below. [Need help?](#)

Column Values  
Row Account

	Total Budget Amount (\$um)	Pre Encumbered Amount (\$um)	Encumbered Amount (\$um)	Expense Amount (\$um)	Remaining Budget (\$um)
+ All	2790426954.980	-2493.120	15340105.970	2743887006.240	31202335.890

Show Filters

2. Click the **Search** icon.

**Business Unit**

98000 

**Budget Reference**

2017

**Search** **Clear**

3. Select the correct **Business Unit** from the search results.

Cancel

Lookup

Search for: Business Unit

Search Criteria

Search Results

1 row

Business Unit	Description
51000	Valdosta State University

4. The system will return you to the dashboard after the business unit has been selected in the step above.

Employee Self Service

Department Manager Expenses

Prompts

Business Unit

51000

Budget Reference

2017

Search

Clear

Account

700000 (217)

500000 (85)

600000 (76)

727000 (40)

More

Pivot Grid

Press hold icon and drag and drop to column or row below. [Need help?](#)

Column

Values

Row

Account

	Total Budget Amount (Sum)	Pre Encumbered Amount (Sum)	Encumbered Amount (Sum)	Expense Amount (Sum)	Remaining Budget (Sum)
+ All	2790426954.980	-2493.120	15340105.970	2743887006.240	31202335.890

5. Click **Search** to populate the data for the selected business unit.

Prompts

Business Unit

51000

Budget Reference

2017

Search

Clear

6. Click the **Options Icon**.

The screenshot shows the 'Department Manager Expenses' dashboard. On the left, there are filters for Business Unit (51000) and Budget Reference (2017). The main area displays a Pivot Grid with columns for Total Budget Amount (\$), Pre Encumbered Amount (\$), Encumbered Amount (\$), Expense Amount (\$), and Remaining Budget (\$). A red arrow points to the Options icon (gear symbol) in the top right corner of the dashboard.

	Total Budget Amount (\$)	Pre Encumbered Amount (\$)	Encumbered Amount (\$)	Expense Amount (\$)	Remaining Budget (\$)
+ All	191119825.210	63.850	3929356.910	181325569.490	5864834.960

7. Click **Save**.

The screenshot shows the same dashboard as before, but with a context menu open over the Pivot Grid. The menu options are 'Update Filters', 'Export Data', 'Save', and 'Save As'. A red arrow points to the 'Save' option.

	Total Budget Amount (\$)	Pre Encumbered Amount (\$)	Encumbered Amount (\$)	Expense Amount (\$)	Remaining Budget (\$)
+ All	191119825.210	63.850	3929356.910	181325569.490	5864834.960

The Dashboard is now set up for use.