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.

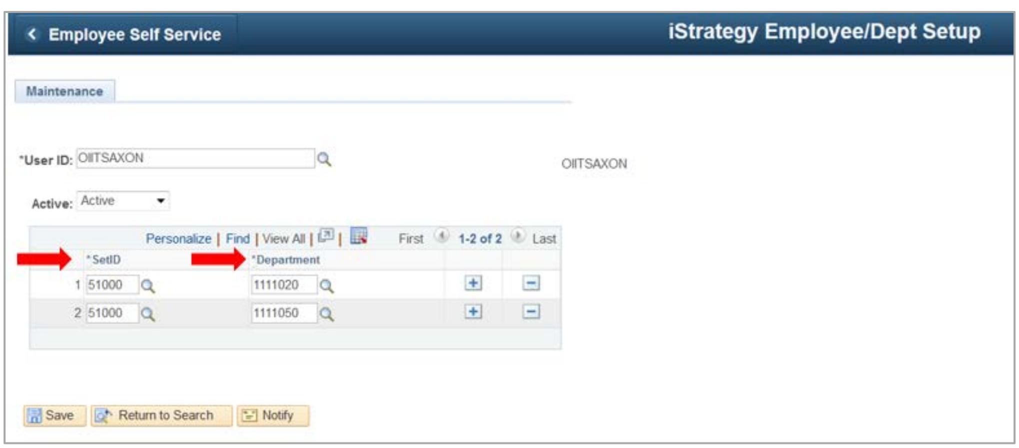
Setting up Dashboard Security

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**.



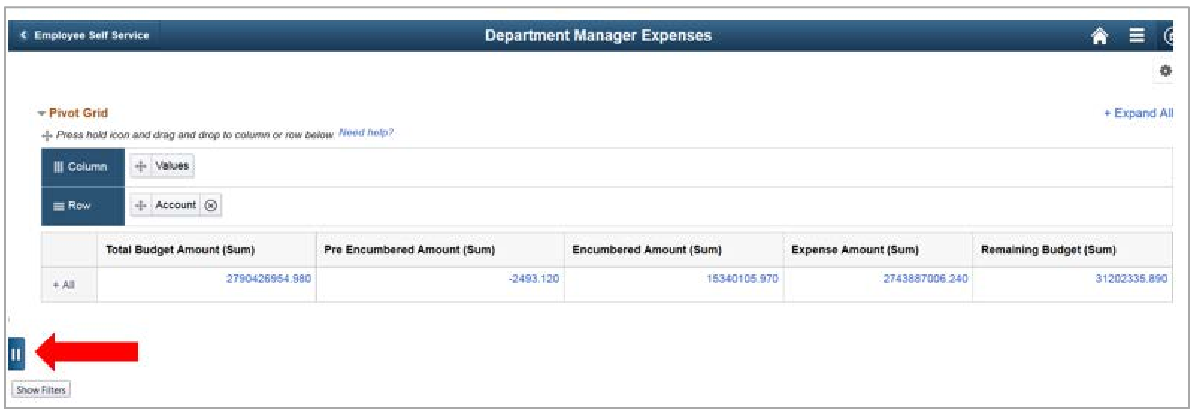
Define User's Business Unit

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.

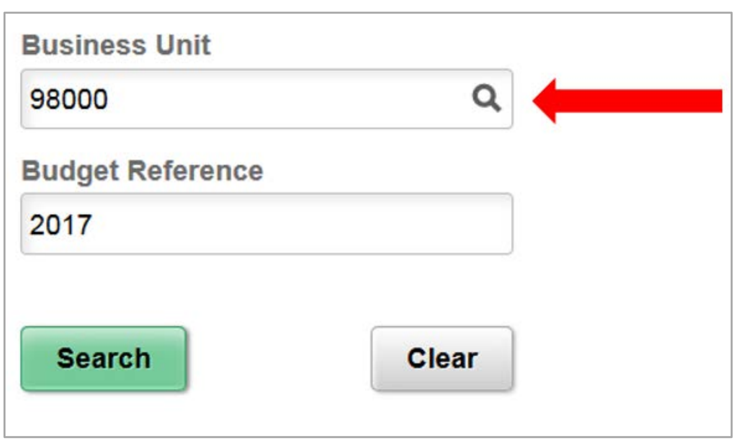
The following steps need to be completed for both the expenses and revenue dashboards.

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

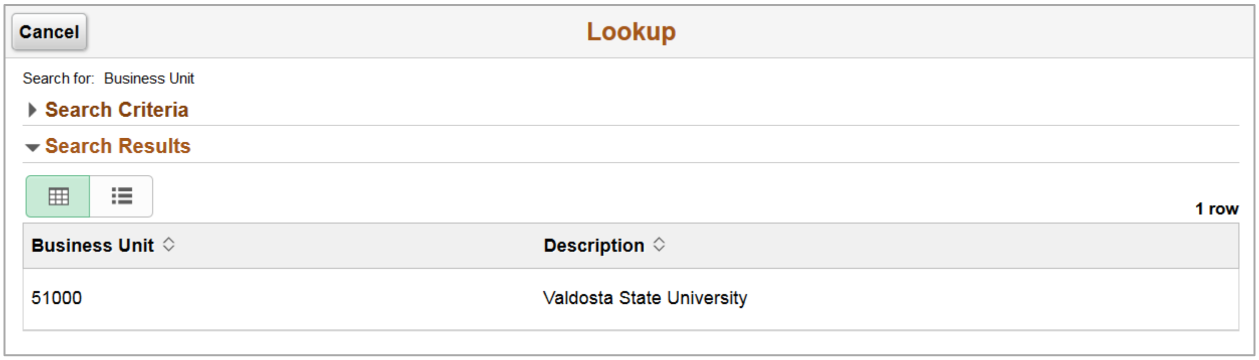
1. Click the **Show Filters** tab.



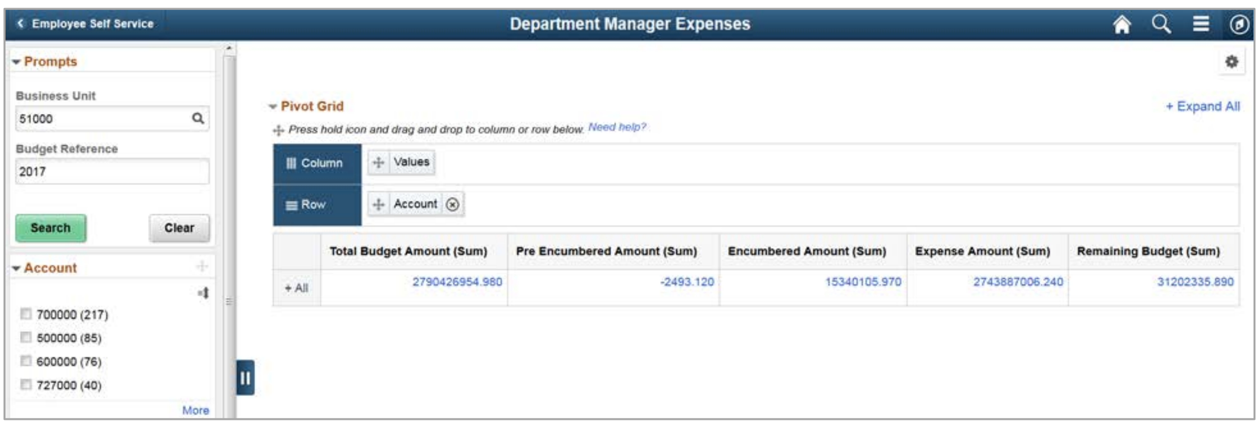
2. Click the **Search** icon.



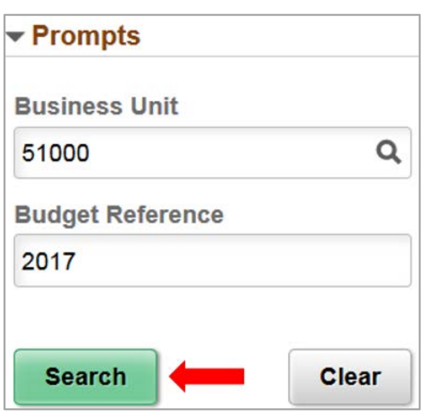
3. Select the correct **Business Unit** from the search results.



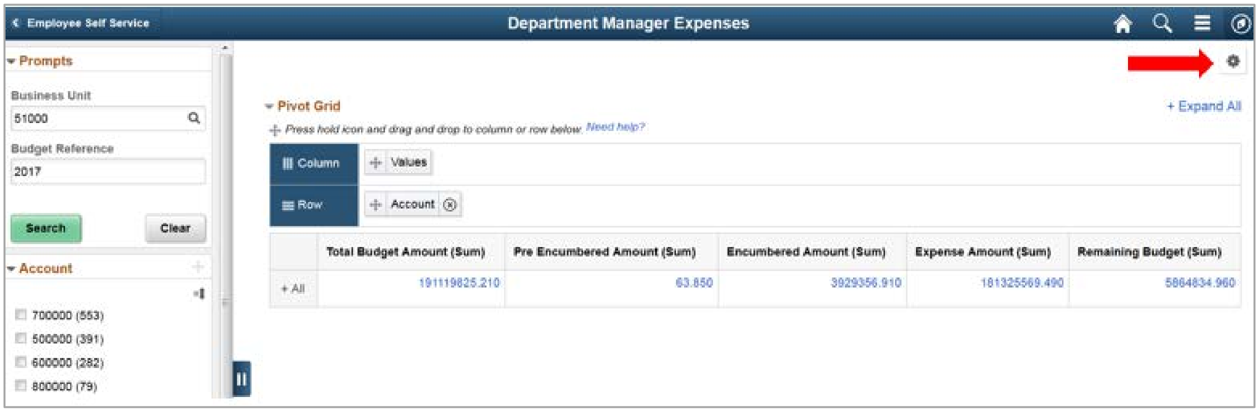
4. The system will return you to the dashboard after the business unit has been selected in the step above.



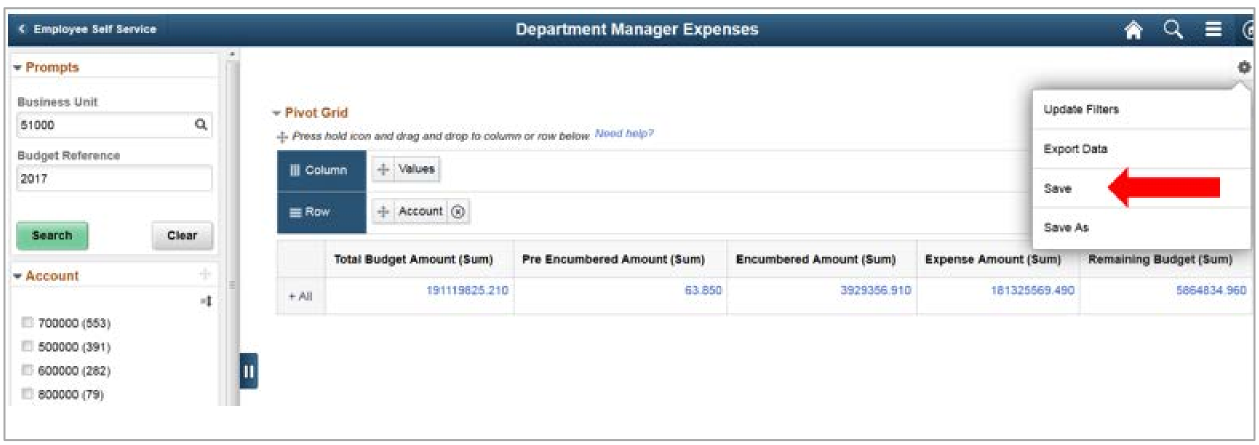
5. Click **Search** to populate the data for the selected business unit.



6. Click the **Options Icon**.



7. Click **Save**.



The Dashboard is now set up for use.