![GeorgiaFIRST - Financial Information & Reporting Systems for Tomorrow - A Project of the University System of Georgia]

![PeopleSoft 9.2]

Top Supplier Dashboard Setup

The Top Supplier Dashboard allows users to view the top supplier activity for a fiscal year. The dashboard functionality is similar to the Department Manager Dashboard offering drill down capability into supplier information and voucher data. Department-level security also allows users to have access only to departments for which they are granted authorization.
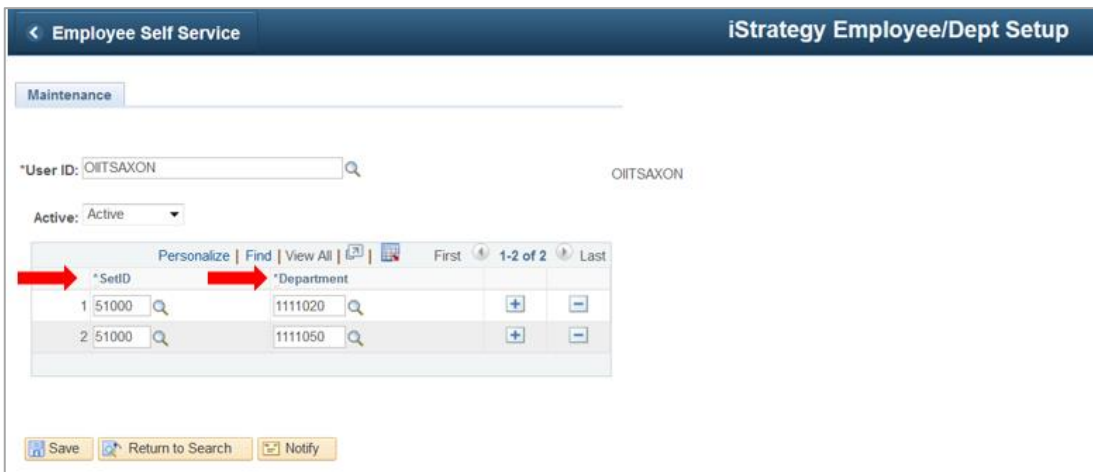
Setting Up Dashboard Security

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_AP_ALLDEPT_ACCESS: Gives users access to the Top Supplier Dashboard for all departments for their institution
- BOR_AP_SELECT_DEPT_ACCESS: Gives users access to the Top Supplier Dashboard for only the departments they manage

When using the BOR_AP_SELECT_DEPT_ACCESS security role, Department-level security will also need to be added via **NavBar > Navigator > 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 a user opens the dashboard, their business unit will default to 97000. As a result, users 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 they enter the dashboard.

Navigation: **NavBar > Navigator > BOR Menus > BOR Accounts Payable> Top Supplier**
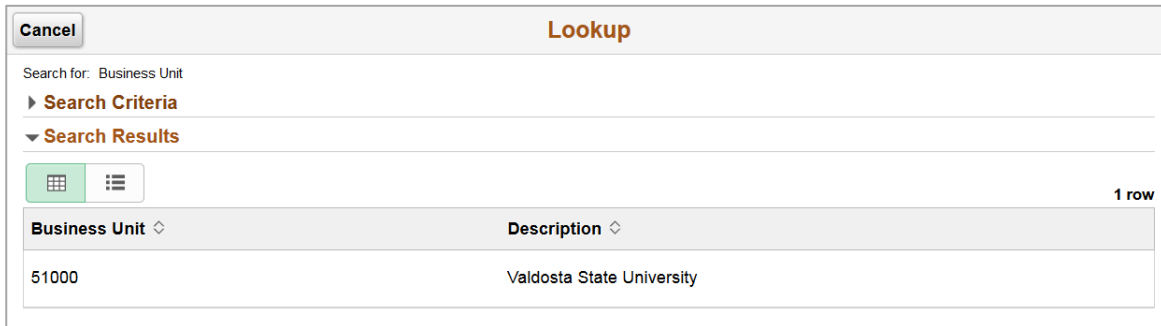
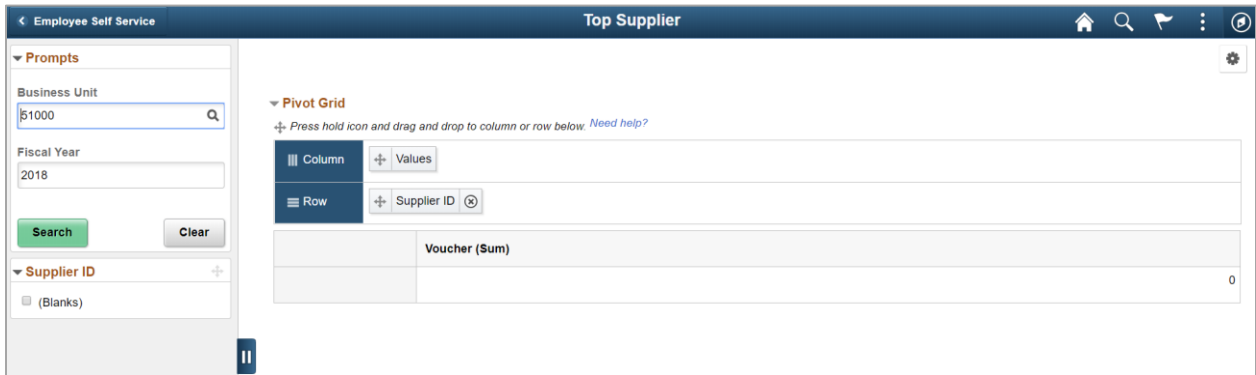1. Click the **Show Filters** tab.
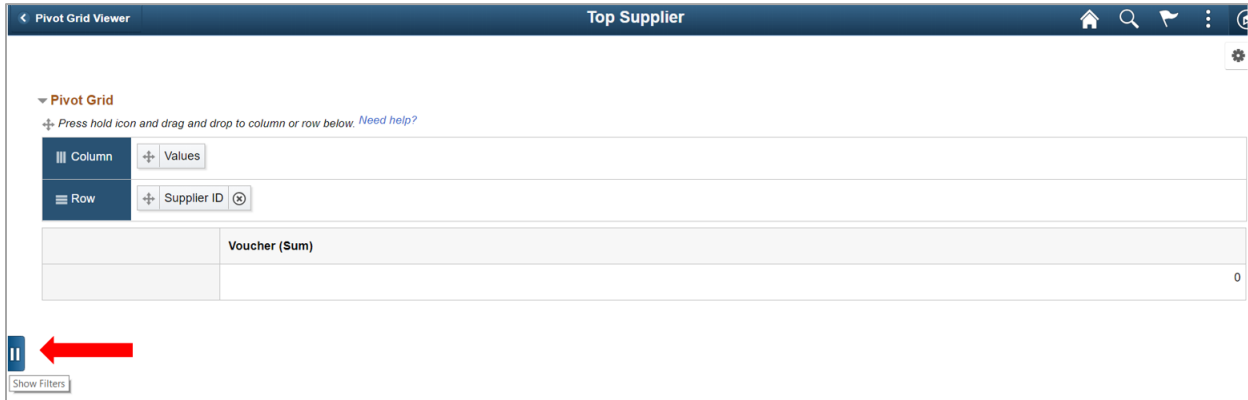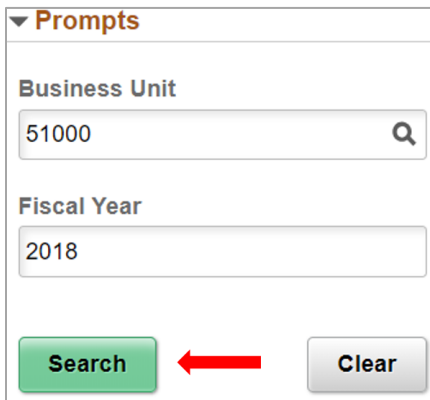

2. Click the **Search** icon.
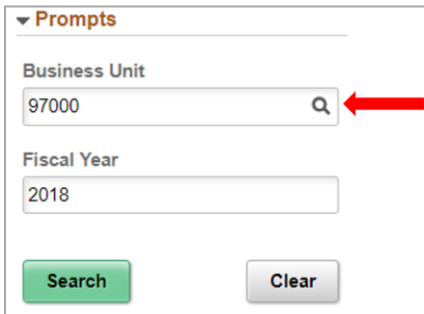
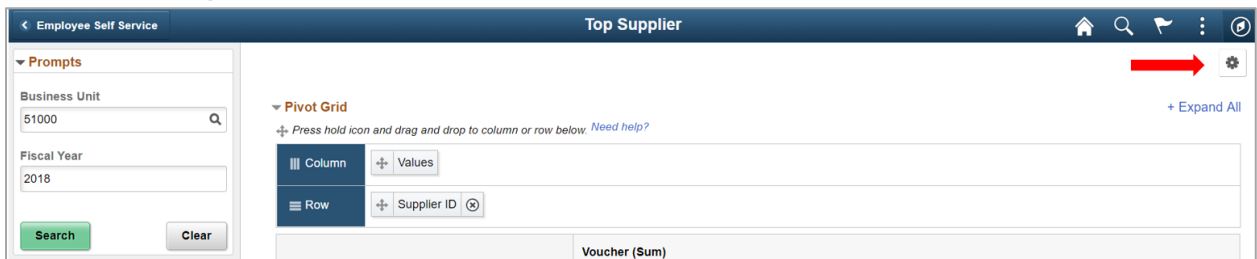3. Select the correct **Business Unit** from the search results.

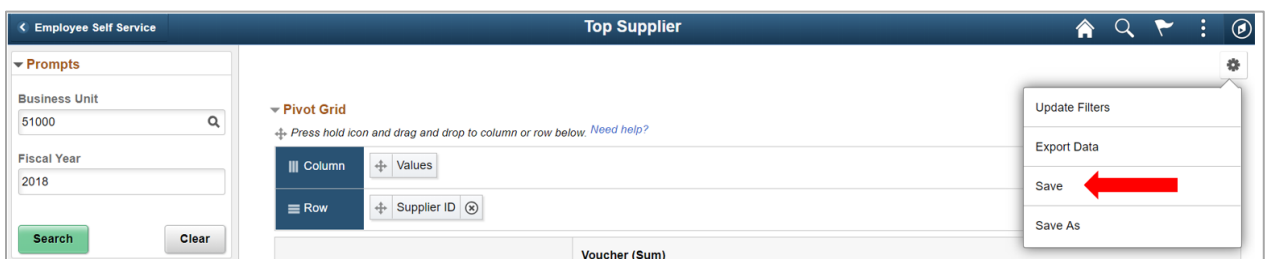4. The system will return you to the dashboard after the business unit has been selected in the step above.

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

6. Click the **Options Icon**.

7. Click **Save**.

The Dashboard is now ready for use.