



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.

Setting up Dashboard Security

The local Security Administrator assigns user security roles and users must have one of the following security roles to access the dashboard:

- BOR_PO_ALLDEPT_ACCESS: Gives users access to the PO Open Encumbrance Dashboard for all departments at their institution
- BOR_PO_SELECT_DEPT_ACCESS: Gives users access to the PO Open Encumbrance Dashboard for specific departments at their institution

Note: When using the BOR_PO_SELECT_DEPT_ACCESS security role, Departmentlevel security needs to be added via iStrategy Department Security page.

Below are step by step instructions for the local Security Administrator to add security roles to 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 iStrategy Department Security link.





Step	Action	
7.	•	artment ID in the designated columns. If a ne department, click the plus (+) button and partment.
	Employee Self Service	iStrategy Employee/Dept Setup
	Maintenance	
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	2 51000 Q 1111050 Q	
	Save Return to Search TNotify	
8.	When all departments are enter	ed click Save .





Defining User's Business Unit

The first time a user opens 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 have been completed, the business unit defaults to the user's business unit each time they enter 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 icon.	
3.	Click the BOR Menus link.	
4.	Click the BOR Purchasing link.	
5.	Click the PO Open Encumbrance link.	
6.	Click the Show Filters tab.	
	Plot & Calum + Pass hold non and drag to column or row babbw. Need help? I Column + Values I Column + Values I Column + Supplier ID O Voucher (Sum) 0	
7.	Click the Search icon.	





Step	Action
8.	Select the correct Business Unit from the search results.
	Cancel Lookup Search for: Business Unit > > Search Results
9.	The system returns to the dashboard after the business unit is selected in the step above.
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Step	Action		
10.	. Click Search to populate the data for the selected business unit.		
	▼ Prompts		
	Business Unit		
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	2020		
	Accounting Period		
	1		
	Search Clear		
11.	Click the Options Icon .		
	Image: Source Accounting Printing Face: Training Ansound (Born) Image: Source		
12.	Click Save . The Dashboard is now ready for use.		
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	Prompts		
	Business Unit		
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	Accounting Period Save t + f Save As		
	Saved Vers		