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

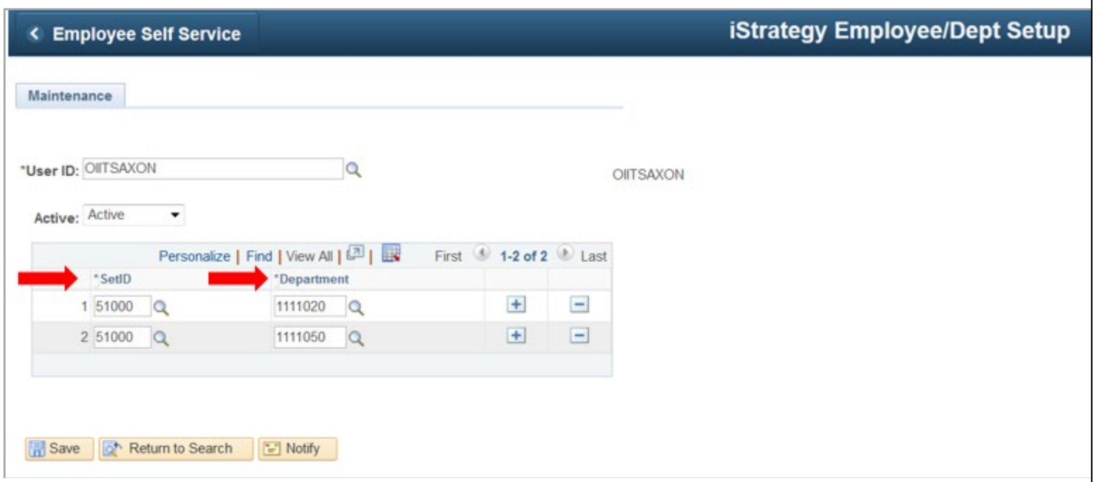
The local Security Administrator assigns user security roles and users must have one of the following security roles to access the dashboard:

- 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, Department-level 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:

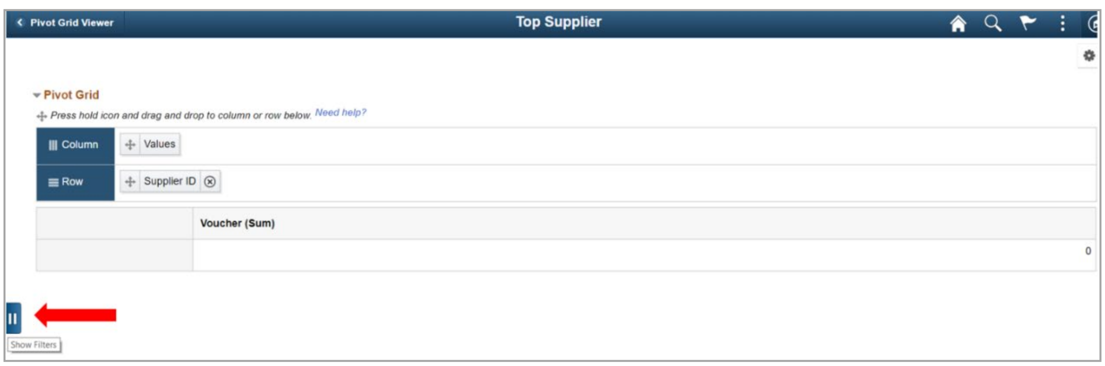
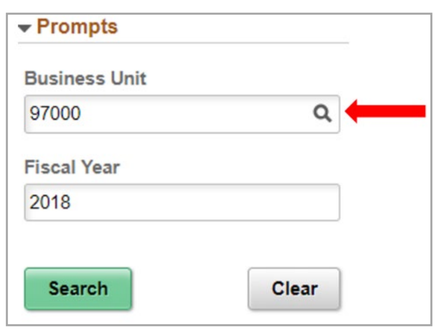
Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Navigator** icon.
3.	Click the **PeopleTools** link.
4.	Click the **Security** link.
5.	Click the **User Profiles** link.
6.	Click the **iStrategy Department Security** link.

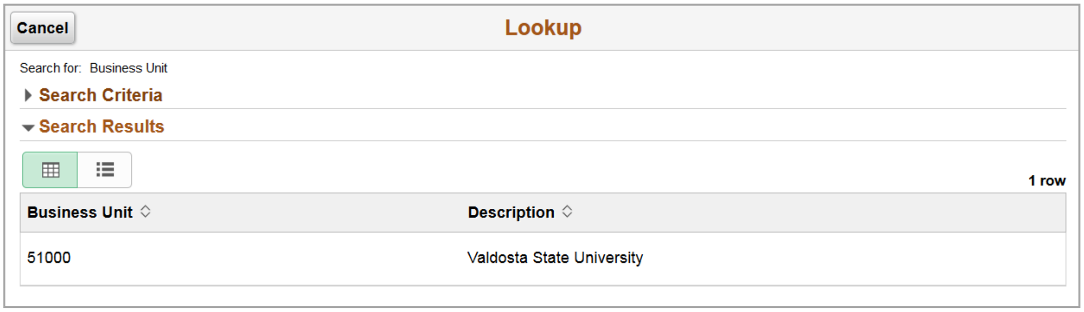
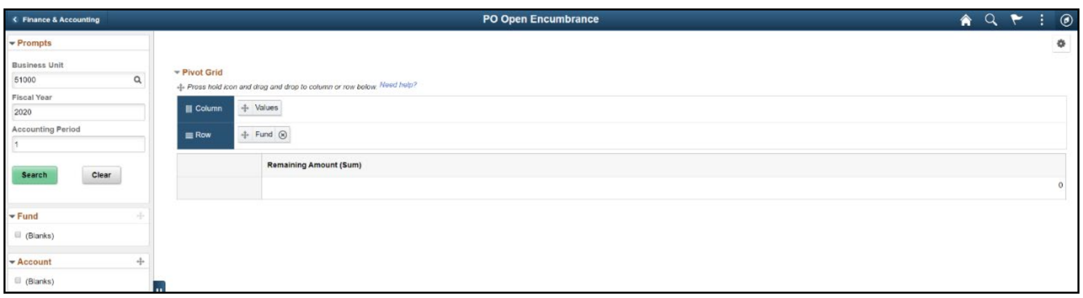
Step	Action
7.	Enter the user's SetID and Department ID in the designated columns. If a user has access to more than one department, click the plus **(+)** button and enter the SetID and second department. 
8.	When all departments are entered click **Save**.

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. 
7.	Click the **Search** icon. 

Step	Action
8.	Select the correct **Business Unit** from the search results. 
9.	The system returns to the dashboard after the business unit is selected in the step above. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>10.</td><td>Click Search to populate the data for the selected business unit.

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<tr><td>11.</td><td>Click the Options Icon.

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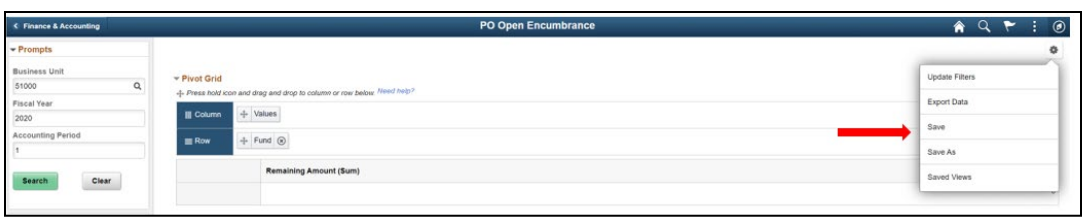
<tr><td>12.</td><td>Click Save. The Dashboard is now ready for use.



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