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, one of the features of the dashboard, allows users to have access only to departments for which they are granted authorization.

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:

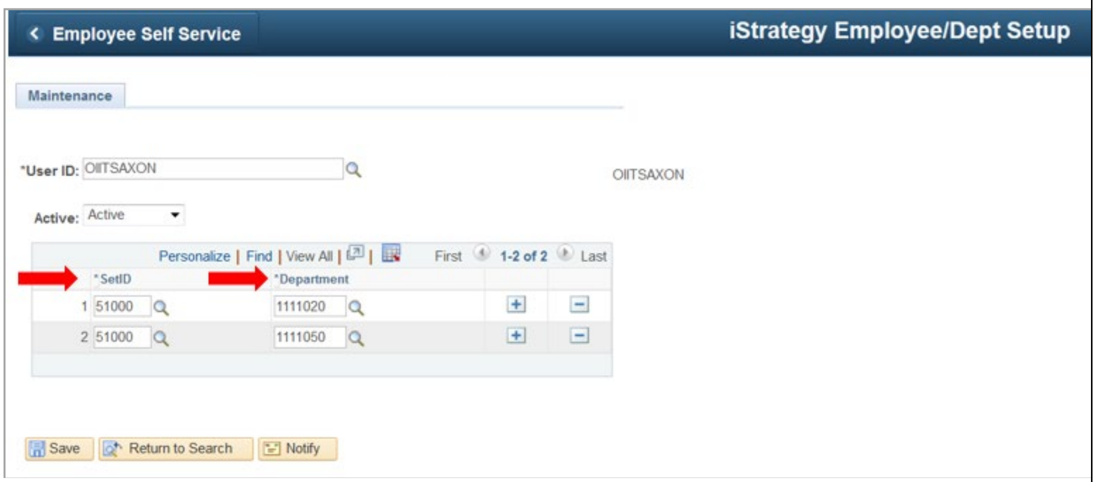
- BOR_PO_ALLDEPT_ACCESS: Gives users access to the Top Supplier Dashboard for all departments at their institution
- BOR_PO_SELECT_DEPT_ACCESS: Gives users access to the Top Supplier Dashboard for specific departments they manage at their institution

***Note**: When using the BOR_PO_SELECT_DEPT_ACCESS security role, Department-level security needs to be added via Dashboard Department Security page.*

Below are step by step instructions for the local Security Administrator to add Department level security for 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 **Dashboard Department Security** link. The system navigates to the Department Setup page.
7.	Enter or search for the users **User ID**.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8.</td><td>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.

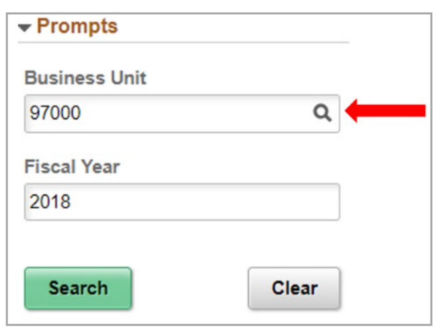


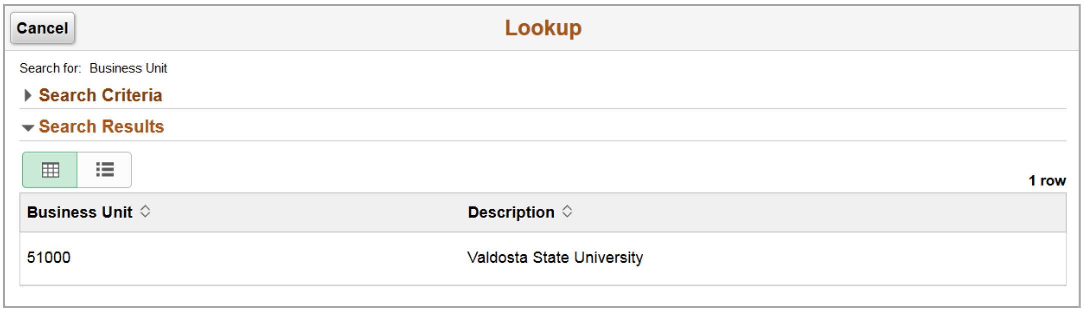
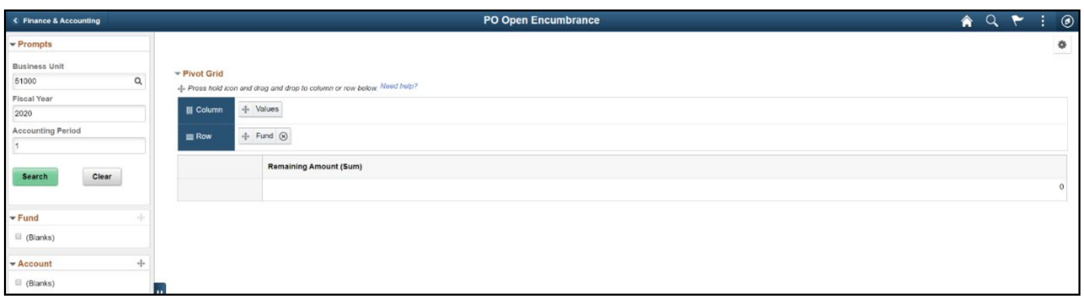
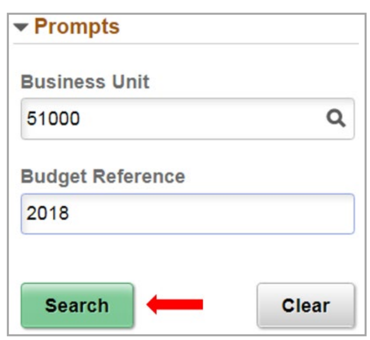
</td></tr>
<tr><td>9.</td><td>When all departments are entered click Save.</td></tr>
</table>

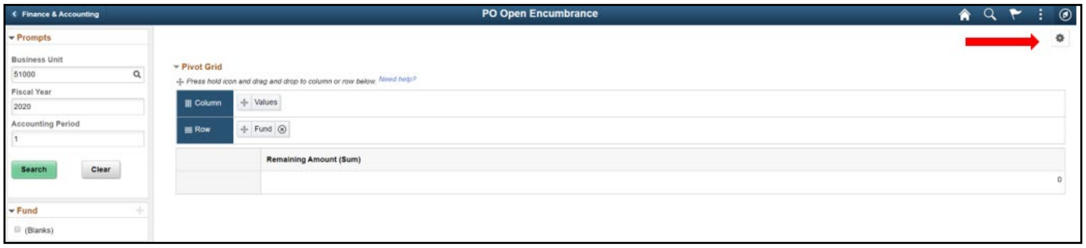
Defining User's Business Unit

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 are complete, the business unit defaults to the user's institution each time the user enters 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 Accounts Payable** link.
5.	Click the **Top Suppliers** 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 users to the dashboard after the business unit is selected in the step above. 
10.	Click **Search** to populate the data for the selected business unit. 

Step	Action
11.	Click the **Options Icon**. A drop down menu appears. 
12.	Click **Save**. The Dashboard is now ready for use.