



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 and Project level security are two of the features of the dashboard and allow users to have access only to departments and/or projects for which they are granted authorization.

Setting Up Dashboard Security

The local Security Administrator is responsible for assigning a user's security roles. Users need one of the following security roles to access the dashboard:

- BOR_AP_ALLDEPT_ACCESS: Gives users access to all departments in the Top Supplier Dashboard for their institution.
- BOR_AP_SELECT_DEPT_ACCESS: Gives users access only to the departments they manage in the Top Supplier Dashboard.
- BOR_AP_ALLPROJECT_ACCESS: Gives users access to all projects in the Top Supplier Dashboard for their institution.
- BOR_AP_SELECT_PROJECT_ACCESS: Gives users access only to the projects they manage in the Top Supplier Dashboard.

With these security roles, Department and/or Project level security will also need to be added via **PeopleTools > Security > User Profiles > Dashboard Department Security or Dashboard Project Security**





Below are step by step instructions for the local Security Administrator to add Department and/or Project 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 .			
	Note: If a user has access to more than one department, click the plus (+) button and enter the SetID and second department.			
	1 98000 1211000 			
	Return to Search 😨 Notify			
9.	Image: Save Image: Return to Search Image: Notify When all departments are entered click Save.			
9. 10.				





Step	Action					
12.	Enter the user's Business Unit and Project in the designated columns.					
	<i>Note</i> : <i>If a user</i> button and ent				nject, click the plus (+) department.	
	General				Dashboard Project Security	
	Empl/Proj Setup					
	*User ID: OIITSAXON Active: Active	a q		Kelly Saxon		
	Personalize *Business Unit	Find View All 🖉 🔜 Fi	rst 🕢 1-2 of 2 🤅	Last		
	1 98000 Q	98136 Q 98660 Q	+			
12	Save Return to Search	Notify				
13.	When all proje	cts nave been	entered	a, click Save	€.	



Defining User's Business Unit

The first time users open 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 Search icon.				
7.	Select the correct Business Unit from the search results.				
8.	The system returns users to the dashboard after the business unit is selected in the step above.				
	Image: Complex Supplier Prompts Business Unit 96000 Fiscal Year 2022 Search Clear * Supplier ID (Blanks)				





Step	Action					
9.	Click Search to populate the data for the selected business unit.					
	< Top Supplier PO Open Encumbrance					
	- Prompts					
	Business Unit Pivot Grid # Press hold icon and drag and drop to column or row below. Need help?					
	Fiscal Year 2022 III Column Values					
	Accounting Period 1					
	Search Clear Clear					
10.	Click the Options Icon. A drop-down menu appears.					
	Prompts Business Unit Fived Grid + Peess hold ion in of data and data to be column or row telew. Need help? + Pees hold ion and data and data to be column or row telew. Need help?					
	Fiscal Year 2022					
	Search Clear + Suppler ID @					
	+ All 59043783.970 - ↑					
	C 00000000 (13) C 000000000 (11) C 000000000 (70)					
	COUDON117 (52) CATOD0001 (51) CATOD0001 (56)					
	0000031921 (29) 000000115 (29) 000000115 (29)					
	0 000008112 (27) More					
11.	Click Save . The Dashboard is now ready for use.					
	< tro Supplier Construction Construction					
	Business Unit					
	2022 Eport Filtered Data					
	Search Lear Voucher (Sum) Save					