DEPARTMENT MANAGER DASHBOARD SETUP

The Department Manager Dashboard is functionality that allows department managers to view financial data, including budgets, pre-encumbrances, encumbrances, and expenses as well as details behind those numbers, in one location.

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.

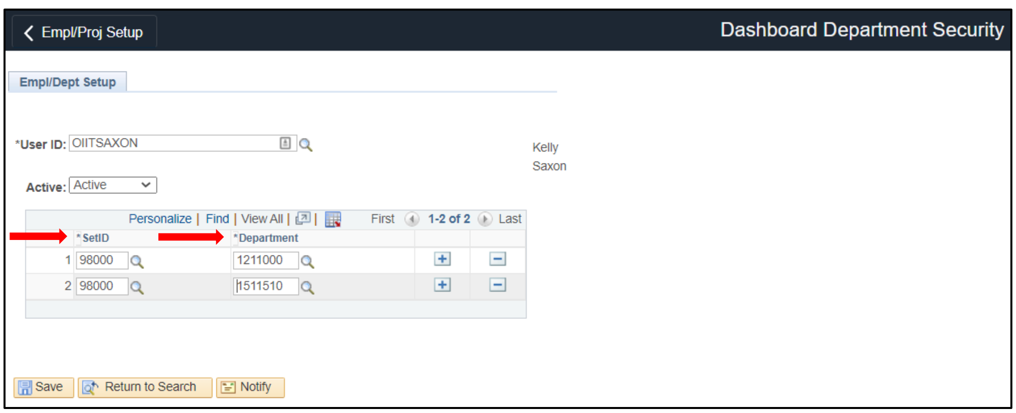
Setting Up Dashboard Security

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:

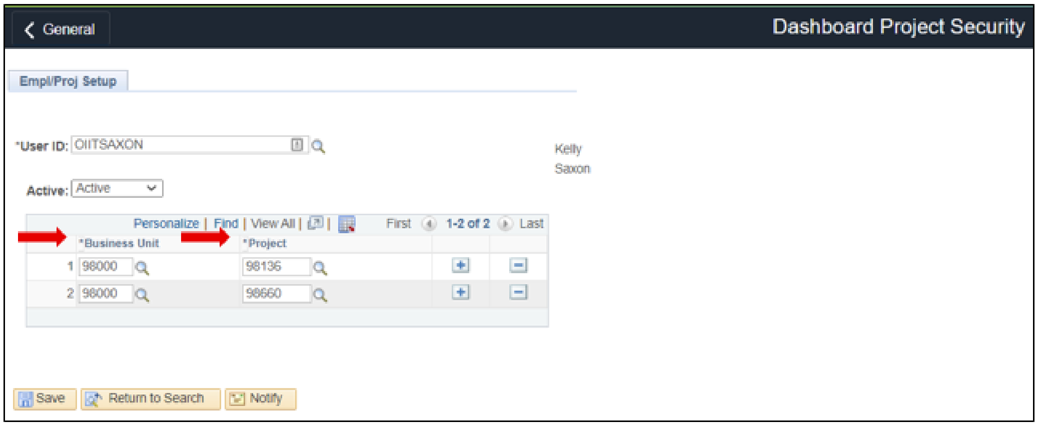
- BOR_GL_ALLDEPT_ACCESS: Gives users access to all departments in the Department Manager Expenses Dashboard for their institution.
- BOR_GL_ALLDEPT_ACCESS_REV: Gives users access to all departments in the Department Manager Revenue Dashboard for their institution.
- BOR_GL_ALLPROJECT_ACCESS: Gives users access to all projects in the Department Manager Expenses Dashboard for their institution.
- BOR_GL_ALLPROJ_ACCESS_REV: Gives users access to all projects in the Department Manger Revenue Dashboard for their institution.
- BOR_GL_SELECT_DEPT_ACCESS: Gives users access only to the departments they manage in the Department Manager Expenses Dashboard.
- BOR_GL_SELECT_DEPT_ACCESS_REV: Gives users access only to the departments they manage in the Department Manager Revenue Dashboard.
- BOR_GL_SELECT_PROJECT_ACCESS: Gives users access only to the projects they manage in the Department Manager Expenses Dashboard.
- BOR_GL_SELECT_PROJ_ACCESS_REV: Gives users access only to the projects they manage in the Department Manager Revenue 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 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**.
8.	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. 
9.	When all departments are entered click **Save**.

<table>
<tr><td>10.</td><td>For Project level security, enter the user's Business Unit and Project ID in the designated columns. If a user has access to more than one project, click the plus (+) button and enter the Business Unit and second project.


</td></tr>
<tr><td>11.</td><td>When all projects have been entered, click Save.</td></tr>
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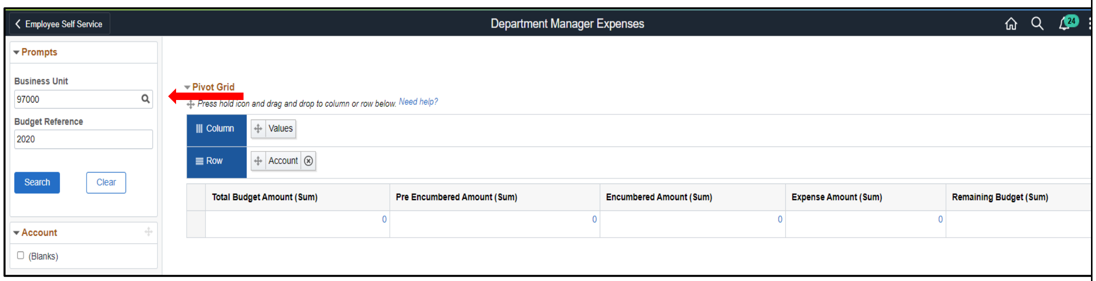
Defining the User's Business Unit

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.

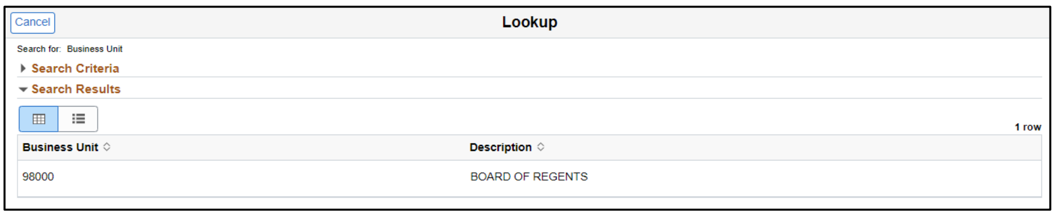
Below are step by step instructions on how to set up a user's default business unit. The following steps need to be completed for both the expenses and revenue dashboards.

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Navigator** icon.
3.	Click the **BOR Menus** link.
4.	Click the **BOR General Ledger** link.
5.	Click the **Department Manager Expenses** or **Department Manager Revenue** link. The system navigates to the corresponding page. ***Note:*** *The following steps need to be completed for both the Expenses and Revenue Dashboards.*

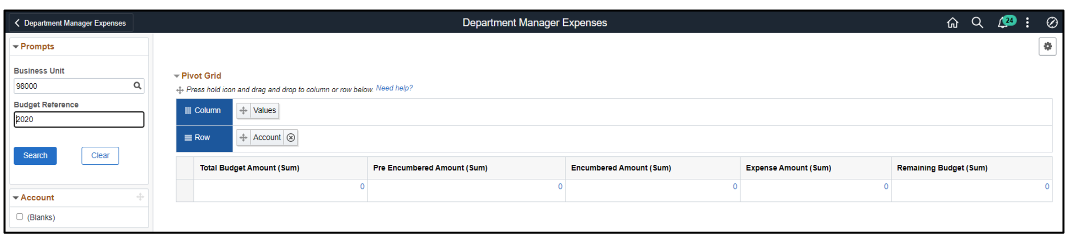
6. Click the **Search** icon.



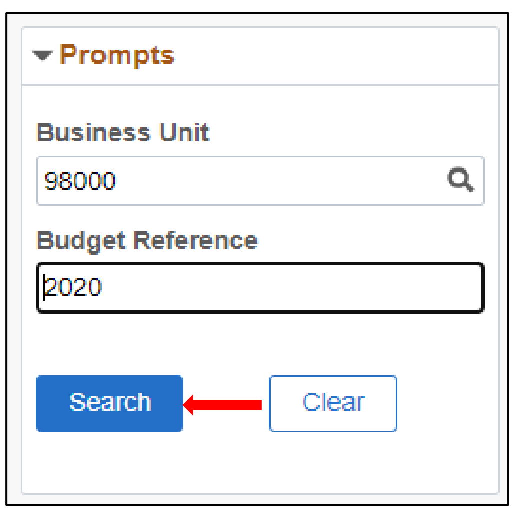
7. Select the correct **Business Unit** from the search results.



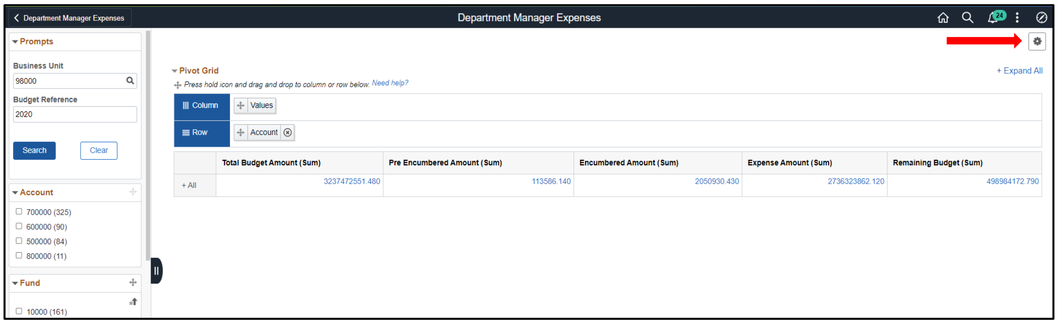
8. The system returns users to the dashboard after the business unit is selected in the step above.



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



10. Click the **Options** icon. A drop down menu appears.



11. Click **Save.** The Dashboard is now ready for use.