TOP SUPPLIER DASHBOARD SETUP

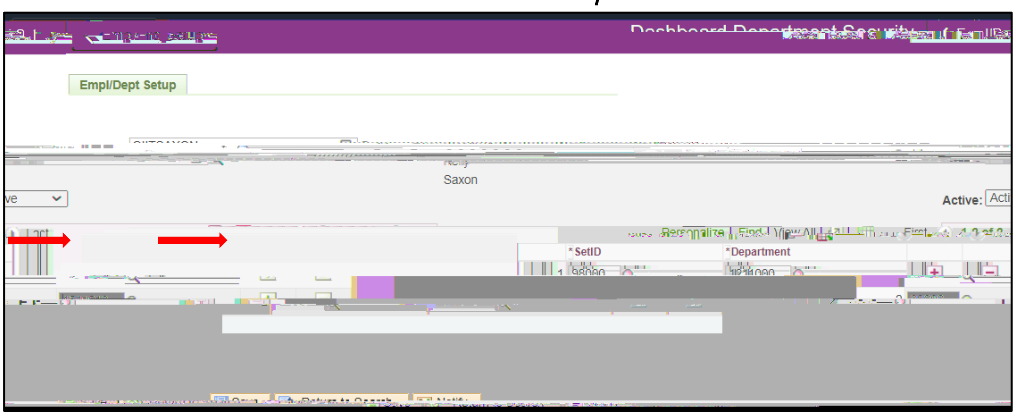
Setting Up Dashboard Security

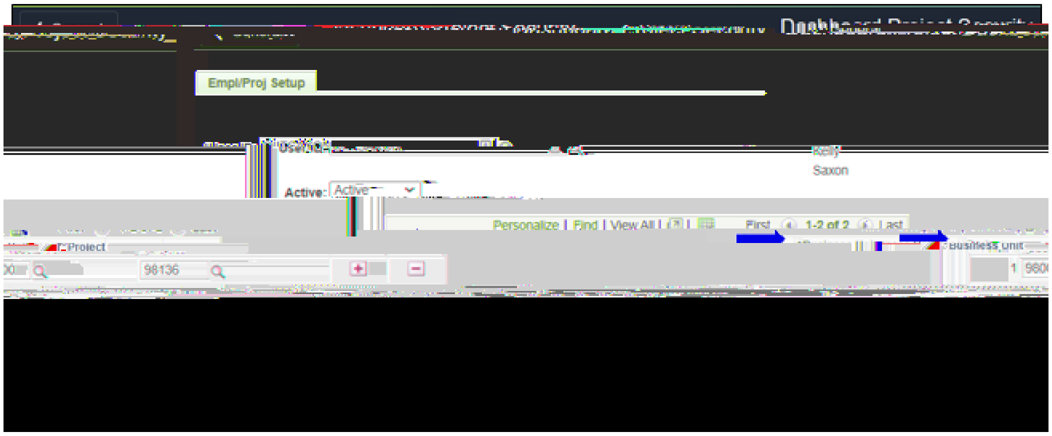
The local Security Administrator is responsible for assigning a user's security roles. Users need one of the following security roles to access the dashboard:

- 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**.
8.	Enter the user's **SetID** and **Department** in the designated columns. ***Note**: 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**.
10.	For Project level security, click the **Dashboard Project Security** link. The system navigates to the Project Setup page.
11.	Enter or search for the users **User ID**.

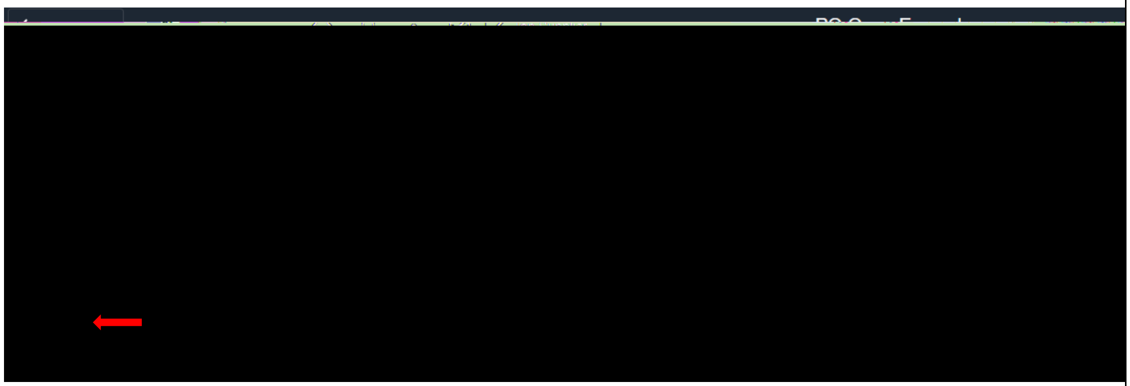
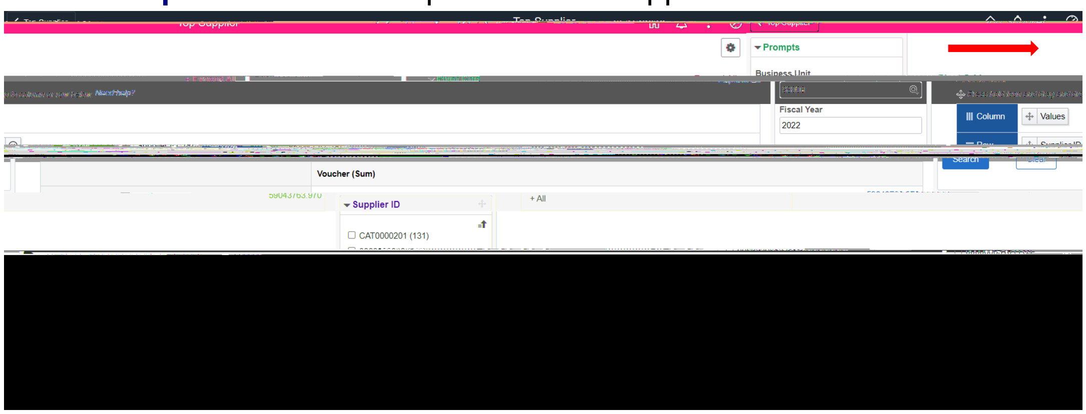
Step	Action
12.	Enter the user’s **Business Unit** and **Project** in the designated columns. ***Note**: If a user has access to more than one project, click the plus (+) button and enter the Business Unit and second department.* 
13.	When all projects have been entered, click **Save**.

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.	

Step	Action
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.