Subaccount Manager Dashboards in Buy.IU

Buy.IU differs from KFS in that it does not have the same routing functionality for subaccount managers. In KFS, requisitions would route to subaccount managers for approval. This step is not an option in BUY.IU approval routing. The UITS Finance Office has designed dashboards for subaccount managers to assist with visibility of requisitions, purchase orders, and invoices created on their subaccounts. These dashboards will take the place of the comments currently made on requisitions that notify subaccount managers that a requisition has been created using their account. Comments regarding requisition creation will be discontinued on September 30, 2019.

This guide walks through the steps required to create these customized dashboards. Please create your customized dashboard following this guide on or before Monday, September 30. Reach out to uitsap@iu.edu if you have questions or need assistance.

There are currently five different saved searches set up that can be customized with different account-subaccounts specific to individual responsibilities. Note: these saved searches will initially bring up invoices for the entire university until new accounts are entered into the search.

- **Requisitions submitted in the last 30 days-** Requisitions that have been submitted within the last 30 days that are waiting for approval as well as ones that have become POs.

- **Requisitions over 2 weeks old with no PO-** Requisitions that were submitted over 2 weeks before the current date that are still waiting in the approval process before they become a PO

- **Open purchase orders-** Purchase Orders that are open for specified account-subaccounts

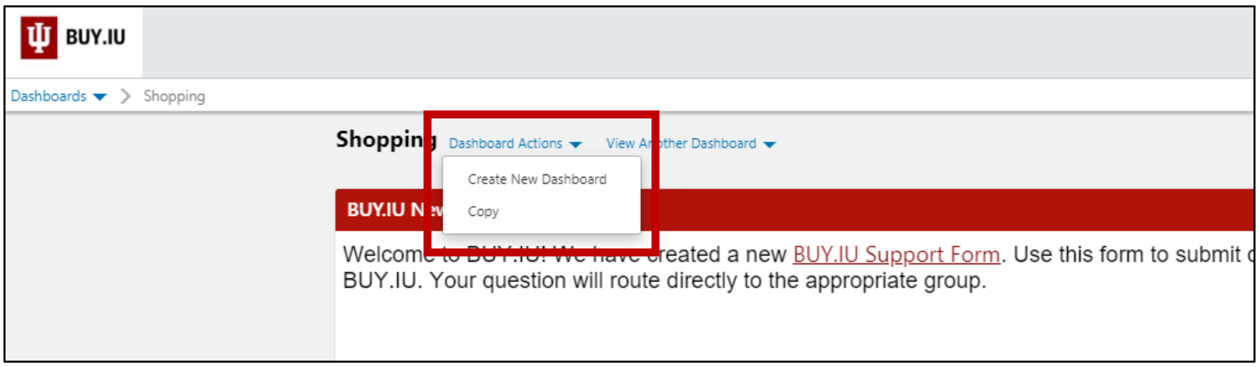
- **Invoices approved within the last 30 days-** Invoices that were approved through the Buy.IU process. They are either in paid or payable (waiting for the due date) status.

- **Invoices waiting on FO approval-** Invoices waiting on the UITS Finance Office to approve. These invoices will either require a forced match or they need a receipt to be created.

Creating a Subaccount Manager Dashboard in Buy.IU

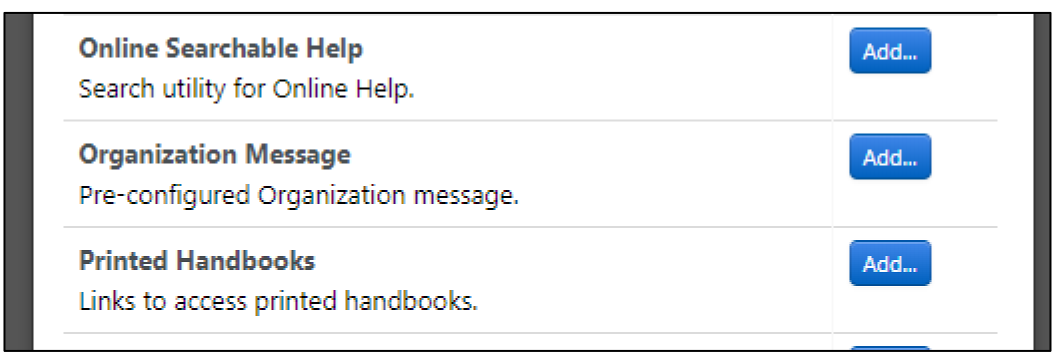
Creating a new dashboard

1. From the Buy.IU homepage, click on the Dashboard Actions drop-down at the upper middle of the screen and select Create New Dashboard.



2. Name the new dashboard and click Create.

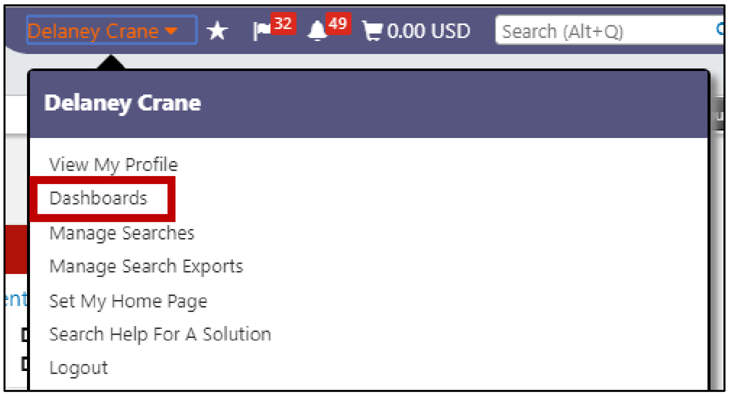
3. Click on Add Widget, and then under the Widget Category dropdown select General. Add Organization Message from this list.



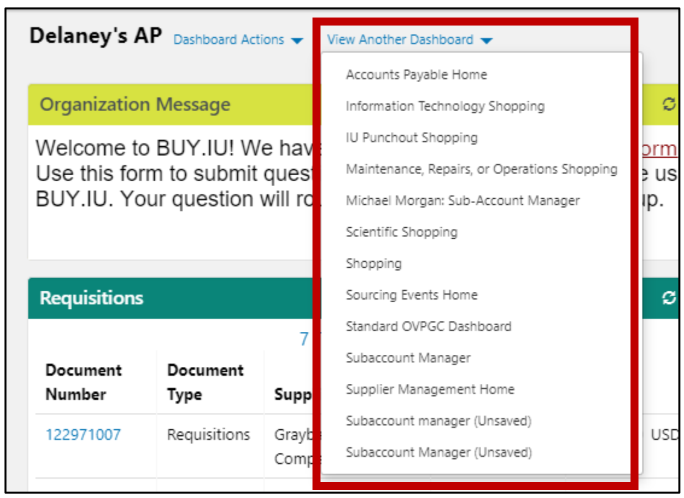
4. In Add Widget there are also options to add Saved Search: Documents, Document Search, Quick Links, and other useful widgets.

5. Save the dashboard.

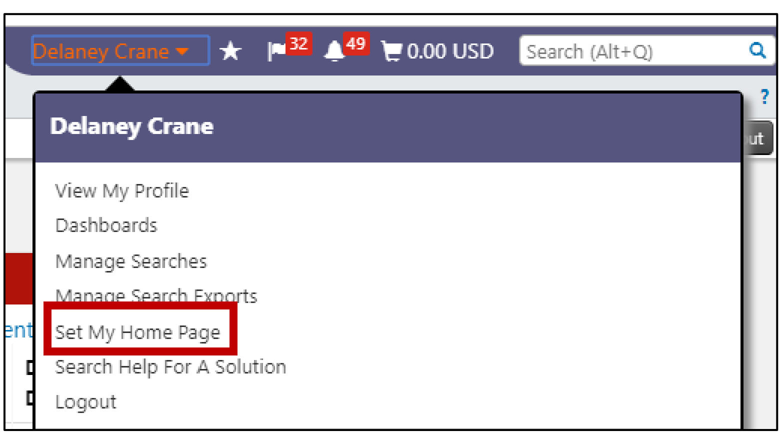
6. To find this dashboard click on your name drop-down and select Dashboards.



7. Select the View Another Dashboard drop-down and select the correct dashboard.

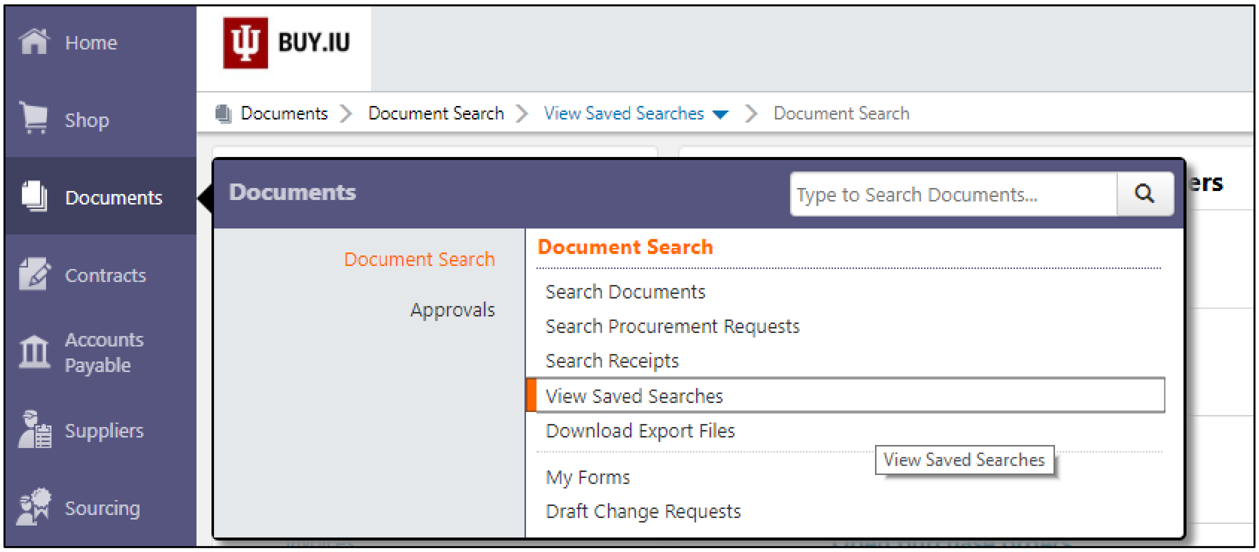


8. Set this as your default home page by clicking on your name drop-down and selecting Set My Home Page.

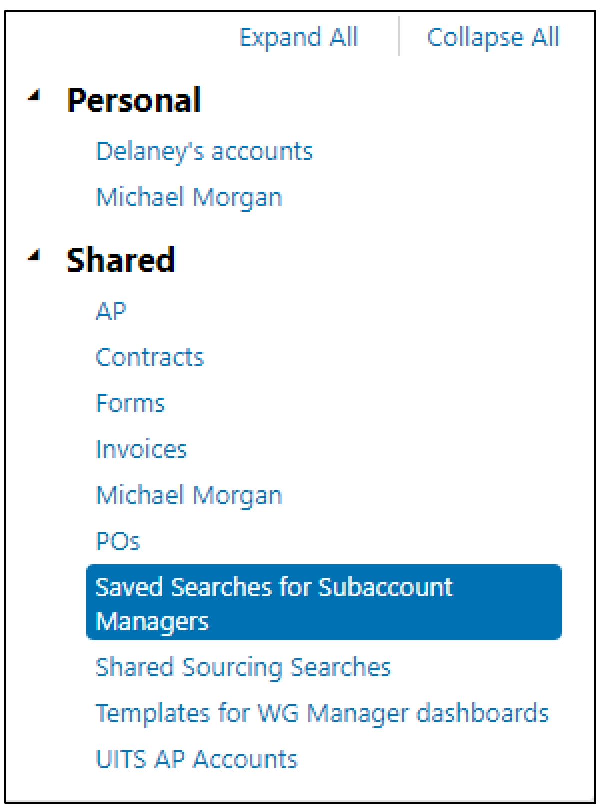


Editing Saved Searches

1. Click on Documents on the left-hand side of the screen, hover over Document Search, and select View Saved Searches.

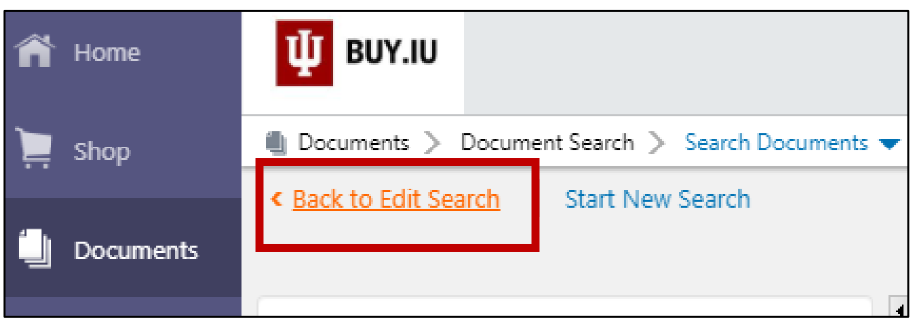


2. Under Shared on the left-hand side of the screen select Saved Searches for Subaccount Managers (please request access from UITSAP if you do not see this option).

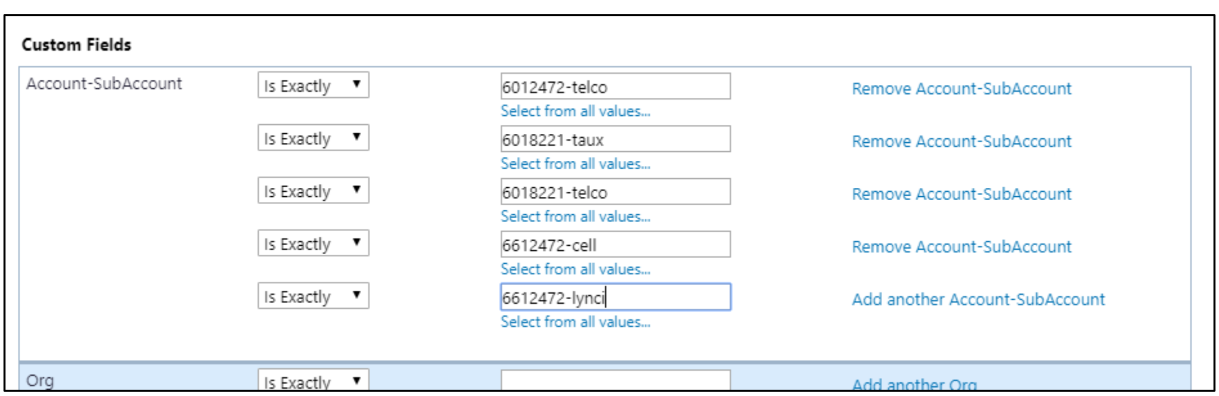


3. On this screen there will be multiple saved searches that can be customized with different accounts and added to a dashboard.

4. Click Go. Once the search is opened select Back to Edit Search in the top left-hand of the screen.

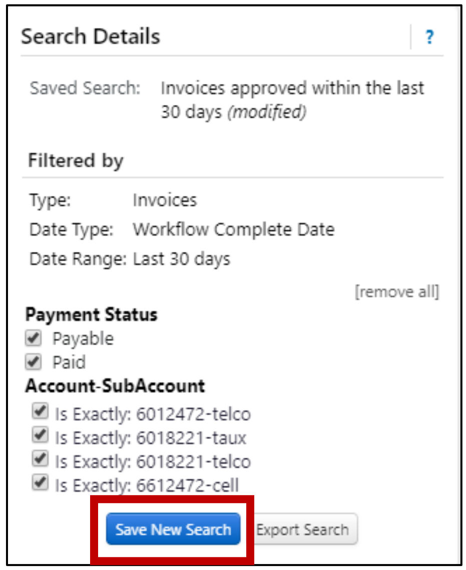


5. Scroll down to the Custom Fields section and enter the account-subaccounts you are responsible for in the Account-SubAccount field in the format shown below.

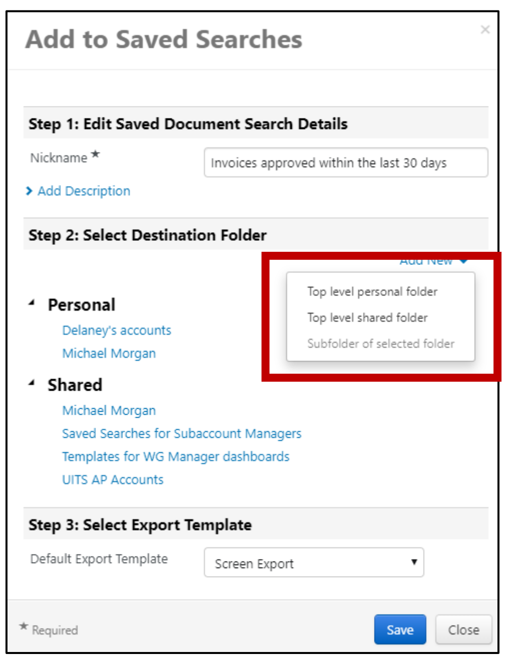


6. Run the search again by clicking the blue Search button at the bottom of the page.

7. After the search is customized with the correct accounts, click Save New Search on the left-hand side of the screen, name the search, and save it to a personal folder.



   a. To create a new personal folder, click on the Add New drop-down and select Top level personal folder.

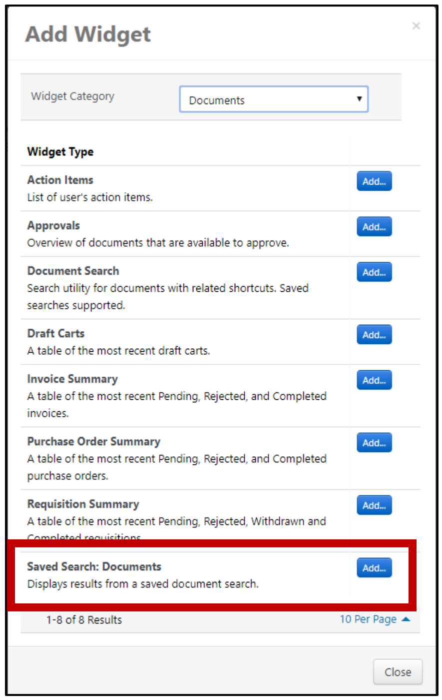


8. Repeat for the four other saved searches listed in step 3.

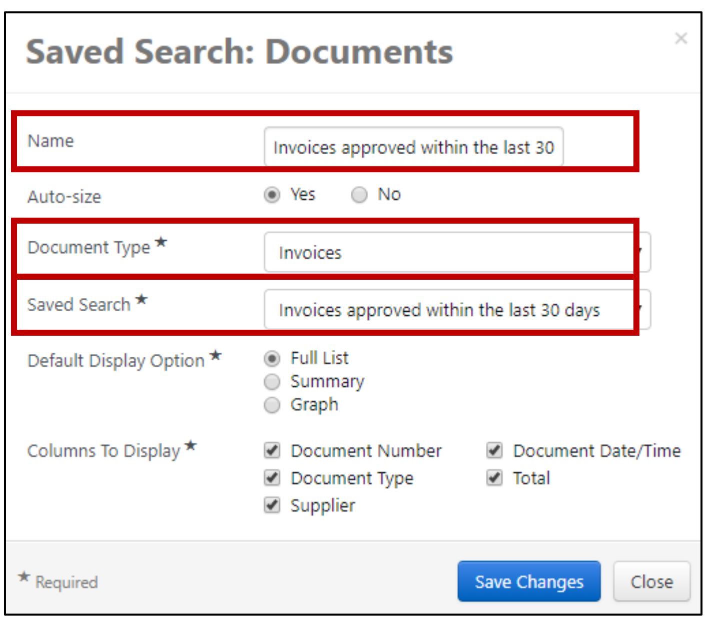
Adding Saved Searches to a Dashboard

1. Edit a previously saved dashboard by selecting Edit from the Dashboard Actions dropdown.

2. Add the widget Saved Search: Documents from the Documents category.



3. Name the widget, select the document type, and select which saved search to pull from.



4. After all the saved searches have been added to the dashboard select Save Changes under the title of the dashboard. These searches can all be modified to fit specific needs such as different date ranges.

*When there is a change to the accounts for which you are responsible, each saved search will need to be updated and resaved. The new saved searches will then need to be updated on the Saved Search widget on your dashboard.

Please let UITSAP know if you have any questions at uitsap@iu.edu