

DEPARTMENTS

SET UP

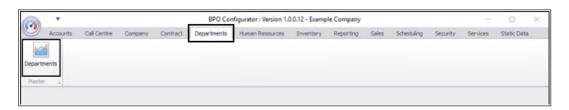
A **department** must be set up in order to link invoice items to a specific department, e.g. **Sales**. If a **site** is selected, then the department will pull through on the Sales Order and Sales Invoice item lines automatically. If you have more than one department, you <u>must</u> select the relevant department for each line.

Departments need to set up to categorise **Contracts**.

If you have a segmented ledger and post general ledger entries based on **departments**, you need to ensure that Sales Orders, Sales Invoices, Contracts and Employees are **linked** to a department.

An **employee** can only be linked to <u>one</u> department type but can be linked to that department type in <u>more than one</u> site.

Ribbon Access: Configurator > Departments > Departments



The **Departments** screen will be displayed. This screen is divided into **two** frames:

- i. Sites
- ii. Department Associations

Department Associations will be addressed further on in this manual.



SITES FRAME

The *Sites* frame lists <u>all</u> the sites linked to this company.

Note: Each site has an *expand* button in front of it. If this button is *bold*, that shows us that there are already departments linked to this site. If the expand button is *faint* then that particular site has no linked departments.

In this image you can see that *Durban* and *Pretoria* have *linked* Departments (*bold* expand button) and *Cape Town* and *Johannesburg* do <u>not</u> have any linked departments (*faint* expand buttons).

- Click on the *expand* button in front of one of the *sites*.
 - In this image *Durban* has been selected.



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DEPARTMENTS FRAME

- The *Departments* frame for this site will be *expanded*.
- Here you can view a list of all the *departments* currently *linked* to this site.
- In this image, there is a
 - Sales
 - Technical and
 - Development

department currently linked to the Durban site.



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Cape Town				
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ADD A DEPARTMENT

- Click in the *final row* of the *Departments* frame. This row will now be *'activated'* and you can now type in the *new* department details.
 - **DEPTDepartment:** Type in the *code* for this new department.
 - **DEPTDepartment Description:** Type in a *description* for this new department.
 - **Status:** This will auto populate with **A** Active.
 - (You will note that the *Associations* frame has populated with an *Item Type* data grid and the frame *title* has changed to *New Department... Associations* as you clicked on the new row. This will be addressed further on in the manual).



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• When you have finished entering the new department details, either press *Tab* or *Enter* on your keyboard.



- A *Confirmation* message box will pop up asking;
 - Are you sure you want to save changes to this department?
- Click on Yes.



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E Dev Development A			
I CCentre Call Centre Department A			
🗄 Pretoria			
Cape Town	×		
	Yes No Cancel		
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• As you click on Yes, a *new row* will be created in the currently open *Departments* data grid.



- A *Select the applicable items* screen will pop up.
- Here you can click on the *check box(es)* to *link* this new department to *any* or *all* of the *site(s)* listed in this screen.

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ave Layout Workspaces	Refresh									
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I Tech	Technical	A								
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- In this image, a site that *already* contains departments (Durban) has been selected as well as a site that has *no* departments linked to it (Johannesburg).
 - Note: Until this point, Johannesburg had a *faint* expand icon - indicating *no* linked departments.
- When you have made your site selection(s), click on *Accept*.



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El Tech	Technical	A						
1 Dev	Development	A						
• 🗄 CCentre	Call Centre Department	A						
•								
El Pretoria								
Cape Town	😽 Selec	t the applicable	items	-	D X			
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	Select sit	es for this departm	ient.					
	🗹 Durbar							
	Pretori							
	Cape T							
	V Johan	nesburg						



- The new department details will be *saved* in the selected sites.
- The new row will now be *'activated'* in the open Durban Departments data grid.
- You will note that Johannesburg now has a *bold* expand button.
 Click on this button.



		Departments - BP	O Configurator : Ver	sion 1.0.0.12 - Exam	ple Company		×.	۵	X
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• The Johannesburg Departments frame will be *expanded*. Here you can view the newly added department details.



• **Collapse** all the open Department frames when you have finished adding departments.

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Home Accounts	Call Centre Company Contra	t Departments	Human Resources Inventory Reporting Sales Scheduling Security Services Static Da	ta –	₿ X
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♦ 🗄 Sales	Sales Department	A			
🗄 Tech	Technical	A			
E Dev	Development	A			
CCentre	Call Centre Department	A			
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Pretoria]		
Cape Town					
Johannesburg					
9. DEPTDepartment	DEPTDepartmentDescription	Status			
GCentre	Call Centre Department	A			
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VIEW DEPARTMENT ASSOCIATIONS

- In the *Departments* screen, select a *site* by clicking on the *expand* button in front of that site.
 - In this image, *Durban* has been selected.

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A '			De	partments - Bi	O Configurator : V	ersion 1.0.0.1	2 - Example	Compa	ny			8	٥		X
Home Accounts	Call Centre	Company	Contract	Oepartments	Human Resources	Inventory	Reporting	Sales	Scheduling	Security	Services	Static Data	2	ð	Х
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- The *Departments* frame for Durban will be expanded.
- *Click anywhere* in the *row* of the *department* that you wish to *view* the associations of.



• In this image, the *Sales Department* has been selected

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E Tech	Technical	A										
🗄 Dev	Development	A										
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Cape Town												
1 Johannesburg												
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- The *Department Associations* frame will now populate with all the associations linked to this department.
 - Note: You will see that the *title* of the frame has changed to *Sales* Department Associations. If the *Technical* Department had been initially selected, the title would have changed to *Technical* Associations.

ADD AN ASSOCIATION

• Click in the *Item Type* text box in the *final row* of the *Asso-ciations* data grid.



ave La	ayout Workspaces R	al Centre Company Contract					duling Security Services Static Data	
		Sites				Sales Departn	nent Associations	_
SiteO	Description			ItenType	ItemTypeDesc	ItemCode	ItenName	
	urban			+ CUST	Customer	CUS001	Cash Sales Account	
1	4 DEPTDepartment	DEPTDepartmentDescription	Status	EMPL	Employee	HAR001	Chris Haynes Attendee	
- 11	g III Sales	Sales Department	A	EMPL.	Employee	BAL001	Susan Cooper	
Î	🗄 Tech	Technical	A	CUST	Customer	YES001	Young Electric	
	E Dev	Development	Á	BMPL	Employee	MUD001	Judith Mudzengi	
	E CCentre	Call Centre Department	A	EMPL.	Employee	TIM	Joseph Timber	
	•			EMPL	Employee	E987654	Jeff Rivers	
E Pr	etoria			EMPL	Employee	306001	Joel James	
a	ape Town			EMPL	Employee	M1.001	Abigal Mine	
I)0	hannesburg			EMPL	Employee	DUT002	Tammy Du Toit	
				CUST	Customer	THE0001	The Very Interesting Shop of Goodles	
				CUST	Customer	APP0001	Apple Juice Inc	
				CUST	Customer	GRE0002	Great New Customer	
				CUST	Customer	NET001	Networking and Laptops	
				CUST	Customer	C030001	CO3 Test Co.	
				CUST	Customer	STA001	Stan and Lopez	
				CUST	Customer	IT50001	IT Supples	
				CUST	Customer	GD80001	Good Books	
				* <u></u>				

• A *drop-down arrow* will be revealed. Click on this arrow to display the *Item Type* menu.



• Click on the *Item Type* that you wish to *associate* with this department.

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ave Layout Workspaces R	lefesh						
	Sites				Sales Departs	ment Associations	
SteDescription			ItenType	ItemTypeDesc	ItemCode	ItemName	
E Durban			CUST	Customer	CU5001	Cash Sales Account	
9. DEPTDepartment	DEPTDepartmentDescription	Status	EMPL	Employee	HAR001	Chris Haynes Attendee	
) 🗄 Sales	Sales Department	A	EMPL	Employee	BAL001	Susan Cooper	
8 Tech	Technical	A	OUST	Customer	YE5001	Young Electric	
E Dev	Development	A	EMPL	Employee	MUD001	Judith Mudzengi	
CCentre	Call Centre Department	A	BMPL	Employee	TIM	Joseph Timber	
•	Construction of the second		EMPL	Employee	E987654	Jeff Rivers	
E Pretoria			EMPL	Employee	1003001	Joel James	
Cape Town			BMPL	Employee	MEL001	Abigal Mine	
Iohannesburg			EMPL	Employee	DUT002	Tammy Du Toit	
			OUST	Customer	THE0001	The Very Interesting Shop of Goodles	
			CUST	Customer	APP0001	Apple Juice Inc	
			CUST	Customer	GRE0002	Great New Customer	
			CUST	Customer	NET001	Networking and Laptops	
			OUST	Customer	C030001	CO3 Test Co.	
			CUST	Customer	5TA001	Stan and Lopez	
			CUST	Customer	IT50001	IT Supplies	
			CUST	Customer	G080001	Good Books	
			1	*			
			Type	A Description			
			ASMN CUST EMPL FNLC DWN	Asset Customer <u>Employee</u> Functional Location Inventory Item			
			PROJ WKOR	Project Work Order			
			x				

• In this image, *Employee* has been selected.



- The *Item Type* and *Item Description* text boxes will now populate with the selected details.
- Click in the *Item Code* text box.

	Sites				Sales Depa	rtment Associations	
SiteDescription			ItenT	ype ItemTypeDesc	ItemCode	ItemName	
🖯 Durban			CUST	Customer	CU5001	Cash Sales Account	
4 DEPTDepartment	DEPTDepartmentDescription	Status	EMPL	Employee	HAR001	Chris Haynes Attendee	
♦ 🗄 Sales	Sales Department	A	EMPL.	Employee	BAL001	Susan Cooper	
SiteDescription Durban A DEPTDepartment DEPTDepartmentDescription Status A DEPTDepartment DEPTDepartment A Dev Development A Dev Development A Cal Centre Cal Centre Department A Development Cal Centre Department A Development A Developme	CUST	Customer	YES001	Young Electric			
E Dev	Development	A	EMPL	Employee	MUD001	Judith Mudzengi	
E CCentre	Call Centre Department	A	EMPL	Employee	TIM	Joseph Timber	
•			EMPL	Employee	E987654	Jeff Rivers	
E Pretoria			EMPL	Employee	30E001	Joel James	
Cape Town			EMPL	Employee	MIL001	Abigal Mine	
🗄 Johannesburg			EMPL	Employee	DUT002	Tammy Du Toit	
			CUST	Customer	THE0001	The Very Interesting Shop of Goodles	
			CUST	Customer	APP0001	Apple Juice Inc	
			CUST	Customer	GRE0002	Great New Customer	
			CUST	Customer	NET001	Networking and Laptops	
			CUST	Customer	CO30001	CO3 Test Co.	
			CUST	Customer	STA001	Stan and Lopez	
			CUST	Customer	TTS0001	IT Supplies	
			CUST	Customer	GD80001	Good Books	
			I EMPL	 Employee 			



- An *ellipsis* button will be revealed.
- Click on this button to display the *Select the associated employee* pop up screen.
 - Note: This pop up screen will *change* according to your initial Item Type selection. If, for example, you selected *Asset*, then the correlating pop up screen would be *Select the related asset*.



Home Acc	counts Call C	antre Como	my Contract Depe			or : Version 1.0			heddon	Security	Sandras	Quile Data	1	1 and	X
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	-								Susa	en Cooper					
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EmployeeNumber	FirstName	LastName	FulName	SecondName	Initals	Manager	Department	Departmen.	Jose	sh Timber					
									Jeff	Rivers					
TWA001	Jonotha	Twain-Sutt	Jonothan-Mark Tw		3	Belnda Sha	Tech	Technica	Joel	James					
STE001			Markus Anilus Stev		M	Jonothan	14,47	0	Abig	al Mine					
30H001			Michael-Stark John		M	Markus Arii		0	Tam	my Du Toit					
C03	CO3		CO3 Administrator		c			0	The	Very Intere	esting Shop	of Goodles			
TA0009	Theo	Peterson	Theo Peterson	Peter	TU	Belnda Sha	Tech	Technica	Appl	le Juice Inc					
MUD001	Judith	Mudzengi	Judith Mudzengi		1	Banca Du	Sales	Sales De	Great	at New Cus	tomer				
TIM	Joseph	Timber	Joseph Timber		1		Sales	Sales De	Net	working and	Laptops				
BEN	Ben	Johnson	Ben Johnson		В			0	C03	Test Co.					
E147282	Jade	Rivers	Jade Rivers		1			0	Star	and Lopez					
E987654	Jeff	Rivers	Jeff Rivers		2		Sales	Sales De	17.9	upples					
306001	Joel	James	Joel James		33	Bianca Du	Sales	Sales De	Goo	d Books					
MIL001	Abigal	Mine	Abigal Mine		A		Sales	Sales De							
DUT001	Test	Employee	Test Employee		T			0							
DUT001	Mary	Saunders	Mary Saunders		м			0							
DUT002	Tammy	Du Toit	Tammy Du Toit		T		Sales	Sales De							
DUTO 10	Gabi	Surendorff	Gabi Surendorff		8			0							
								*							
C.					_	_	_	1	1						

- Click on the *row selector* in front of the *employee* that you wish to *link* to this department.
- Click on Ok.



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Home Acco	unts Call C	ientre Compe	any Contract Depu	rtments Hun	uan Resou	rces Invento	ry Reporting	Sales Si	heduling Security Services	Static Data	- 1	ð)
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	(B)								ItenName			
V	2								Cash Sales Account			
Ok Back S	ave Layout								Chris Haynes Attendee			
	-								Susan Cooper			
Process #	Format a								Young Electric			
									Judith Mudzengi			
Employeetkumber P RED001 EMP123 TWA001 STE001 JOH001 CO3 TAD009 MUD001	FirstName	LastName	FulNane	SecondName	Initials	Manager	Department	Departmen.	Joseph Timber			
•						and all the second			Jeff Rivers			
RED001	George 1	Reddy Jeff.	George James Red		G	Chris Hayn	Tech	Technical	Joel James			
EMP123			Carolna Suzzetta		c	Bianca Du	- Carl	0	Abigal Mine			
TWA001			Jonothan-Mark Tw		1	Beinda Sha	Tech	Technical	Tammy Du Toit			
STE001			Markus Anilus Stev		M	Jonothan		0	The Very Interesting Shop	of Goodles		
30H001			Michael-Stark John		M	Markus Arili		0	Apple Juice Inc			
CO3	C03		CO3 Administrator		ċ	The new Company		0	Great New Customer			
TAD009	Theo	Peterson	Theo Peterson	Peter	TJJ	Beinda Sha	Tech	Technical	Networking and Laptops			
ML0001	Judith	Mudzengi	Judith Mudzengi	(1	Bance Du		Sales Dec	CO3 Test Co.			
TIM	Joseph	Timber	Joseph Timber		1	No. of Contraction	Sales	Sales Dec	Stan and Lopez			
) BEN	Ben	Johnson	Ben Johnson		8			0	IT Supples			
JAD01	Jade	Rivers	Jade Rivers		1	Banca Du	Sales	Sales Der	Good Books			
E987654	Jeff	Rivers	Jeff Rivers		1		Sales	Sales Der				
306001	Joel	James	Joel James		33	Banca Du		Sales Der				
MIL001	Abigal	Mine	Abigal Mine		A		Sales	Sales Dec				
DUT001	Test	Employee	Test Employee		T			0				
DUT001	Mary	Saunders	Mary Saunders		M			0				
DUT002	Tammy	Du Toit	Tammy Du Toit		T		Sales	Sales Des .				
10								,				
				-	-				-			

• The selected employee details will now populate the *Item Code* and *Item Name* text boxes.



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	Sites	1			Sales Departm	nent Associations	
SiteDescription			ItemType	ItenTypeDesc	ItemCode	ItenNane	
El Durban			CUST	Customer	CU5001	Cash Sales Account	
9. DEPTDepartment	DEPTDepartmentDescription	Status	EMPL	Employee	HAR001	Chris Haynes Attendee	
) El Sales	Sales Department	A	EMPL	Employee	BAL001	Susan Cooper	
🗄 Tech	Technical	A	CUST	Customer	YES001	Young Electric	
E Dev	Development	A	EMPL	Employee	MUD001	Judith Mudzengi	
El CCentre	Call Centre Department	A	EMPL	Employee	TIM	Joseph Timber	
			EMPL	Employee	E987654	Jeff Rivers	
3 Pretoria			BMPL.	Employee	JOE001	Joel James	
Cape Town			EMPL	Employee	MIL.001	Abigal Mine	
E Johannesburg			EMPL	Employee	DUT002	Tammy Du Toit	
			CUST	Customer	THE0001	The Very Interesting Shop of Goodies	
			CUST	Customer	APP0001	Apple Juice Inc	
			CUST	Customer	GRE0002	Great New Customer	
			CUST	Customer	NET001	Networking and Laptops	
			CUST	Customer	CO30001	CO3 Test Co.	
			CUST	Customer	STA001	Stan and Lopez	
			CUST	Customer	[TS0001	IT Supplies	
			CUST	Customer	GD80001	Good Books	
			I EMPL	Employee	SEN	Ben Johnson ····	

- Press **Tab** or **Enter** on you keyboard.
- An *Update* message box will appear asking;



• Are you sure you want to save the changes to this association?

• Click on Yes.

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		Sites		1		Sales Departs	nent Associations	
St	eDescription			ItemType	ItemTypeDesc	ItenCode	ItenName	
8	Durban			CUST	Customer	CUS001	Cash Sales Account	
	9. DEPTDepartment	DEPTDepartmentDescription	Status	EMPL	Employee	HAR001	Ovis Haynes Attendee	
) El Sales	Sales Department	A	EMPL	Employee	BAL001	Susan Cooper	
	🗄 Tech	Technical	A	CUST	Customer	YES001	Young Electric	
	1 Dev	Development	A	EMPL	Employee	MUD001	Judith Mudzengi	
	CCentre	Call Centre Department	A	EMPL	Employee	TIM	Joseph Timber	
				B/PL	Employee	ED01	Ed Jones	
Ð	Pretoria	(EMPL.	Employee	JAD01	Jade Rivers	
	Cape Town			EMPL	Employee	E987654	Jeff Rivers	
Ð	Johannesburg			EMPL	Employee	30E001	Joel James	
				EMPL.	Employee	MIL001	Abigal Mine	
				EMPL.	Employee	DU/T002	Tammy Du Toit	
				CUST	Customer	THE0001	The Very Interesting Shop of Goodies	
	Updat	e		Х	Customer	APP0001	Apple Juice Inc	
					Customer	GRE0002	Great New Customer	
					Customer	NET001	Networking and Laptops	
		Are you sure you want to	save changes to th	his Association?	Customer	CO30001	CO3 Test Co.	
					Customer	STA001	Stan and Lopez	
		Jes	No	Cancel	Customer	IT50001	IT Supplies	
		10	<u> </u>	Canto	Customer	G080001	Good Books	
				I EMPL	Employee	BEN	Ben Johnson ····	



The details will be *saved* and a *new row* will be created in the *Associations* data grid.

•	Refresh						
	Sites				Sales Departi	nent Associations	
SiteDescription			ItenType	ItemTypeDesc	ItemCode	ItenName	
E Durban			CUST	Customer	CU5001	Cash Sales Account	
4 DEPTDepartment	DEPTDepartmentDescription	Status	EMPL	Employee	HAR001	Chris Haynes Attendee	
▶ 🗄 Sales	Sales Department	A	EMPL	Employee	8AL001	Susan Cooper	
E Tech	Technical	A	CUST	Customer	YE5001	Young Bectric	
E Dev	Development	A	EMPL	Employee	MJD001	Judith Mudzengi	
E CCentre	Call Centre Department	A	EMPL	Employee	TIM	Joseph Timber	
•			EMPL	Employee	ED01	Ed Jones	
El Pretoria			BMPL	Employee	JAD01	Jade Rivers	
Cape Town			EMPL	Employee	E987654	Jeff Rivers	
E Johannesburg			EMPL	Employee	30E001	Joel James	
			EMPL	Employee	M0L001	Abigail Mine	
			EMPL.	Employee	DUT002	Tammy Du Toit	
			CUST	Customer	THE0001	The Very Interesting Shop of Goodies	
			CUST	Customer	APP0001	Apple Juice Inc	
			CUST	Customer	GRE0002	Great New Customer	
			CUST	Customer	NET001	Networking and Laptops	
			CUST	Customer	CO30001	CO3 Test Co.	
			CUST	Customer	STA001	Stan and Lopez	
			CUST	Customer	IT50001	IT Supplies	
			CUST	Customer	GD80001	Good Books	
			BMPL	Employee	BEN	Ben Johnson	
)	•			



Note about Sub-Departments

- In the *Durban Departments* data grid, you will note that one of the departments; *Development*, has an *active /bold* expand button in front of it.
- This indicates that there is <u>one or more</u> linked *sub-departments*.
- Click on this *expand* button.



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E Tech	Technical	A	CUST	Customer	YE5001	Young Bectric	
Dev	Development	A	EMPL	Employee	MJD001	Judith Mudzengi	
CCentre	Call Centre Department	A	EMPL	Employee	TIM	Joseph Timber	
			EMPL	Employee	ED01	Ed Jones	
El Pretoria	1		EMPL.	Employee	JAD01	Jade Rivers	
Cape Town			EMPL	Employee	E987654	Jeff Rivers	
E Johannesburg			EMPL.	Employee	30E001	Joel James	
			EMPL	Employee	MIL001	Abigal Mine	
			EMPL.	Employee	DUT002	Tammy Du Toit	
			CUST	Customer	THE0001	The Very Interesting Shop of Goodes	
			CUST	Customer	APP0001	Apple Juice Inc	
			CUST	Customer	GRE0002	Great New Customer	
			CUST	Customer	NET001	Networking and Laptops	
			CUST	Customer	CO30001	CO3 Test Co.	
			CUST	Customer	STA001	Stan and Lopez	
			CUST	Customer	IT50001	IT Supples	
			CUST	Customer	G080001	Good Books	
			BIPL	Employee	SEN	Ben Johnson	
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- The *Development Department* frame will be expanded.
- Here you can view two linked *sub-departments:*

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- Coding and
- Documentation.
 - Note: As you clicked on the Development Department expand button the Associations screen *title* and *data grid content* changed to the correlating *Development* Associations.
- In this image, *no* associations have been added to this department yet.

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- Click anywhere in the row of one of the sub folders.
 - In this image, *Coding* has been selected.

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- You will see that as you clicked on the Coding Department row, the Associations frame *title* and *data grid content* changes to the correlating *Coding* Associations.
 - In this image, *no* associations have been added to this department yet.



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When you have finished working in the *Departments* screen, *collapse* the open data grids and *close* the screen



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