

We are currently updating our site; thank you for your patience.

DEPARTMENTS

SET UP

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

Departments need to be 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.

Each **Department** and **Sub Department** must be linked to a **Site**.

Departments will be used a lot for a **segmented chart of accounts**. You can slice your chart of accounts by **Departments** as well. So instead of just having a Sales Account, you can have a Sales Account per **Department**. Example - they don't sit under **Sites**, they sit next to it. So you can have **Departments** across the **Sites** or **Sites** across the **Departments**.

Department Associations shows employees or customers that are linked to a particular **Department**.

You can create **Sub Departments** of a **Department** and link employees and customers to those **Departments**. When financial postings happen, it will check that and post to wherever it needs to or whatever the transaction is. It is part of a **segmented chart of accounts** functionality.

An **employee** can only be linked to one Department type but can be linked to that Department type in more than one site.

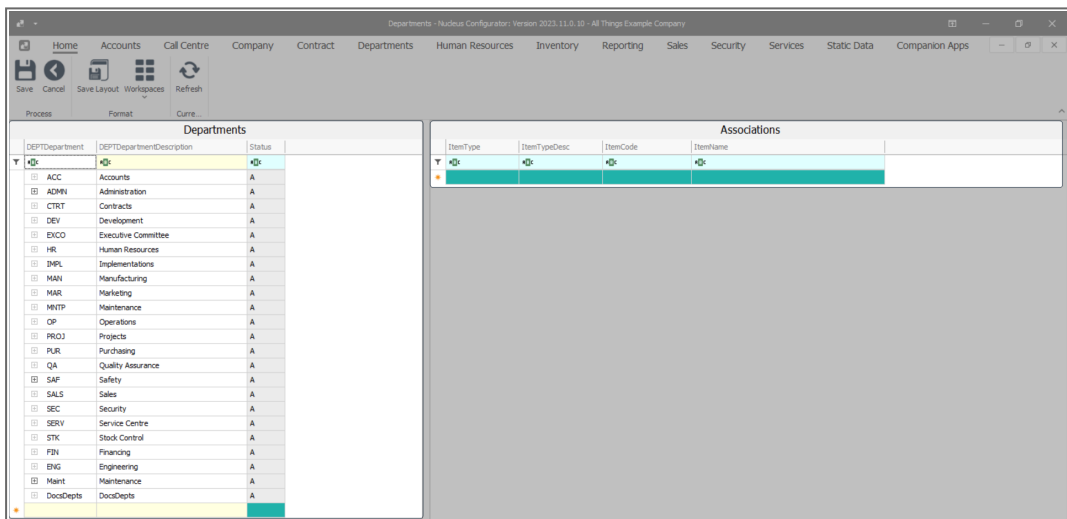
Ribbon Access: Configurator > Departments > Departments



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

Departments

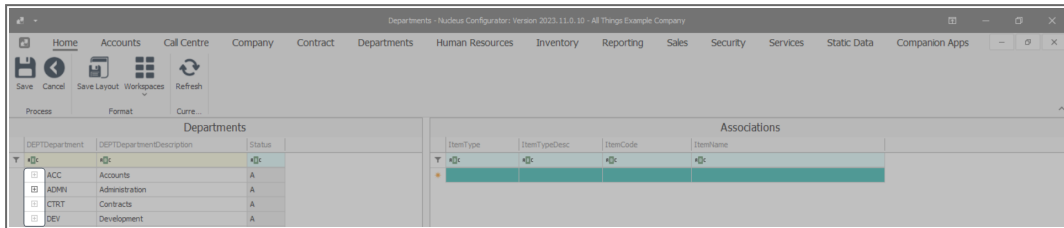
Associations



DEPARTMENTS

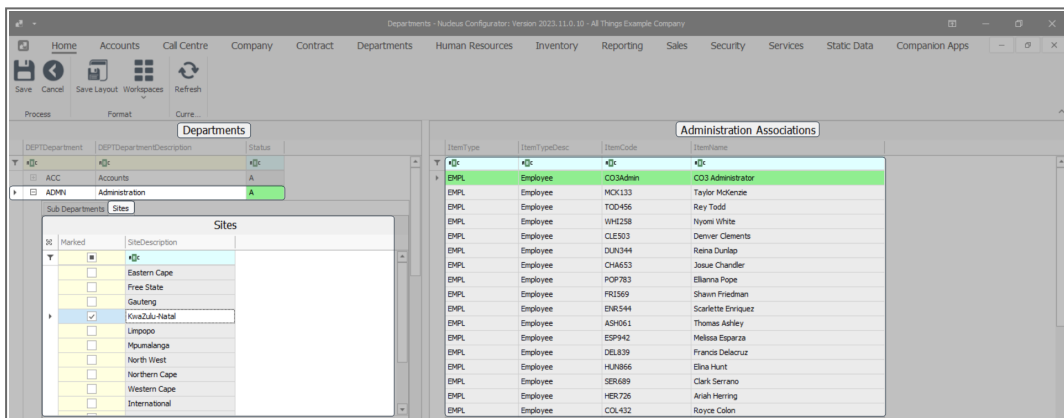
Each **Department** row begins with an **expand** button (+ sign). If the expand button is **bold**, it shows that there are linked **Sub Department(s)**. If the expand button is **feint**, then there are no linked **Sub Department(s)**.

- In this image, you can view the faint and bold **expand** buttons at the beginning of the department rows.

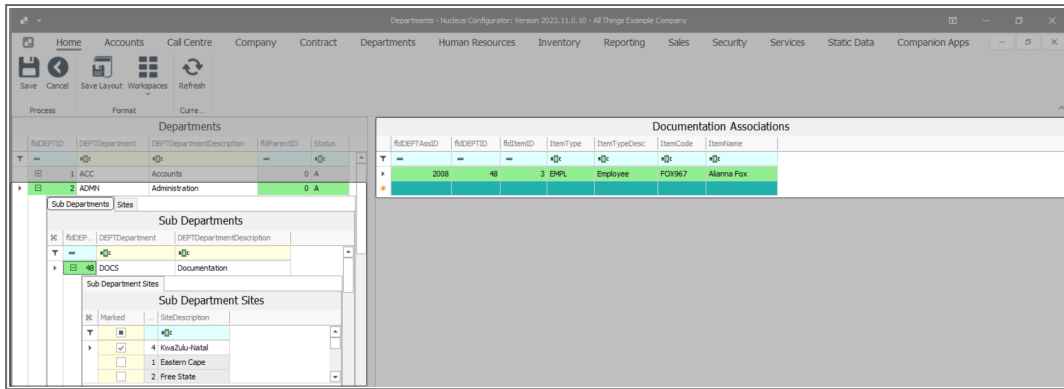


There must be at least one **Site** linked to each **Department** and **Sub Department**.

- This image shows an expanded view of the **Administration Department** showing the **Site** and the **Associations** linked to this Department.

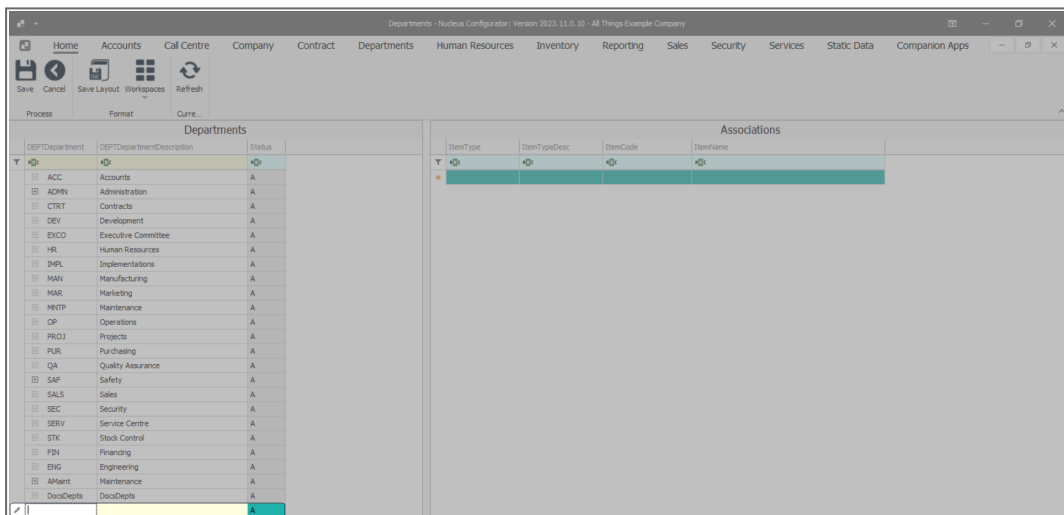


- This image shows an expanded view of a **Sub Department** and the **Sub Department Site** and **Sub Department Association**.

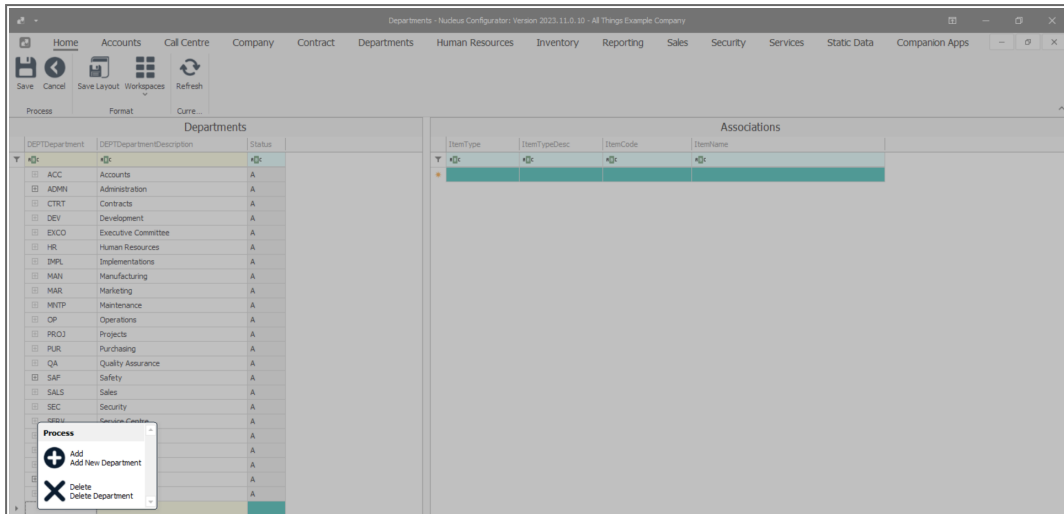


ADD A DEPARTMENT

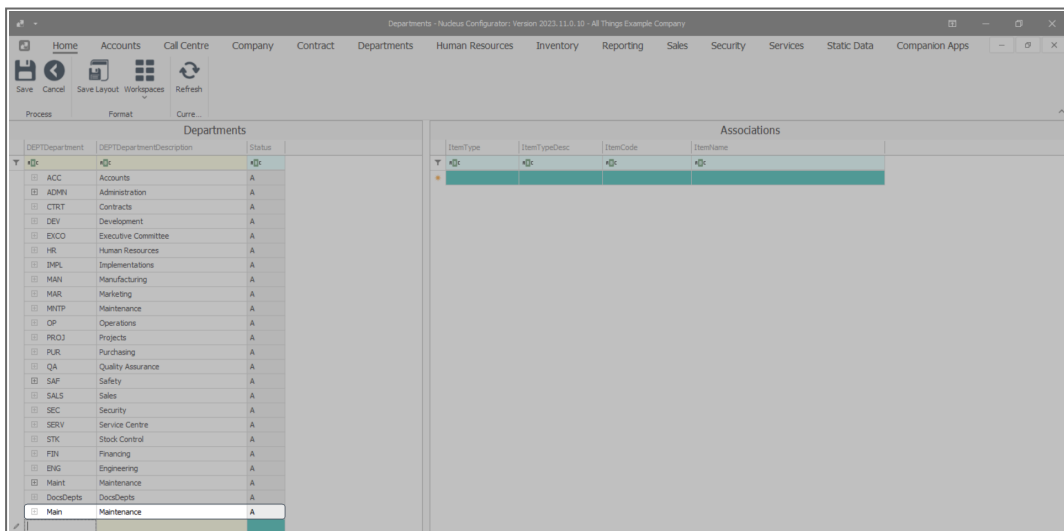
- You have two options to choose from to add a new **Department**. Either click in the **final row** of the **Departments** Grid and a new row will be **'activated'** and you can now add the **new** Department details.



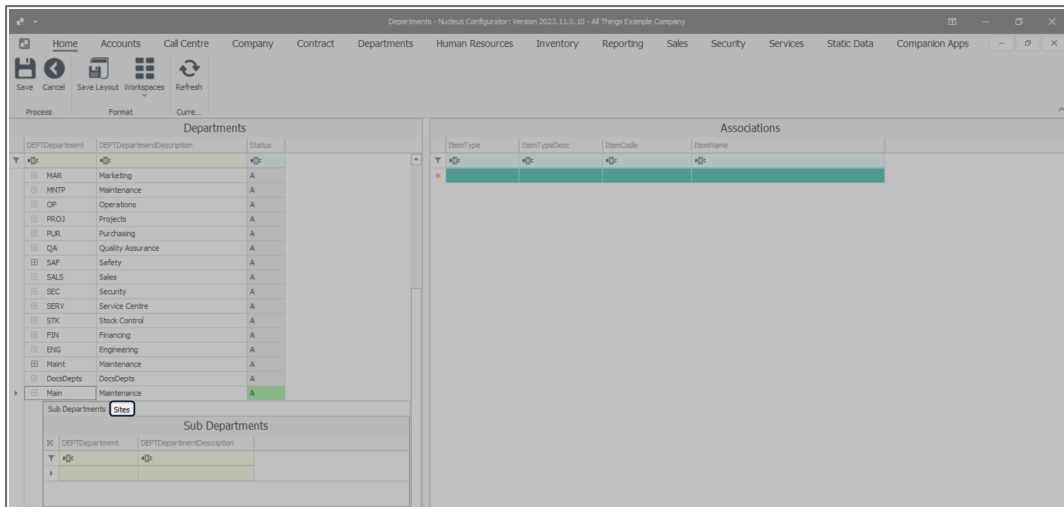
- Or you can right click on the **Departments** Grid to call up the **Process** menu. Click on **Add New Department**. A new row will be **'activated'** and you can now add the **new** Department details.



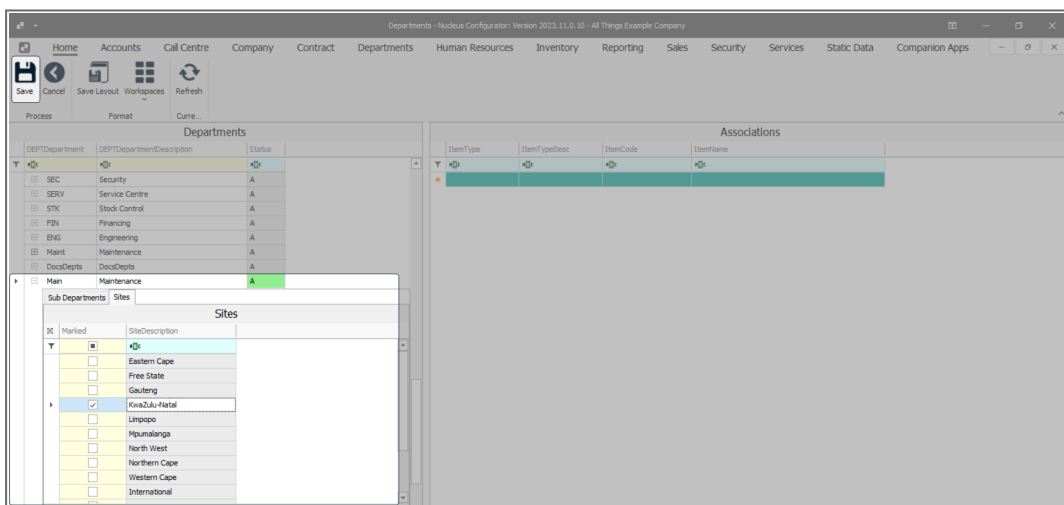
- **DEPTDepartment:** Type in the **code** for this new **Department**, E.G., Main for Maintenance.
- **DEPTDepartmentDescription:** Type in a **description** for this new Department, E.G., Maintenance.
- **Status:** This will auto populate with **A** - Active.
- Tab over to the next row to be able to click on the **expand** button (**+ sign**) at the beginning of the newly added **Department** row :



- This will open the **Sub Department** and **Sites** panels
- . Click on the **Sites** panel.

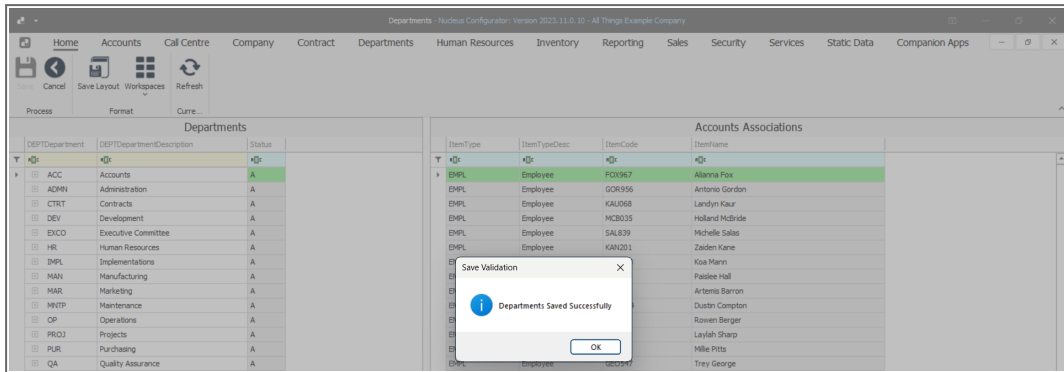


- This will open the **Sites** list for the new **Department**. Select the **Sites** linked to this new **Department**.
- In this example, KwaZulu-Natal has been selected.
- Once you have selected the **Site(s)**, click on **Save**.



- A Save Validation message will pop up saying -
- **Departments Saved Successfully.**

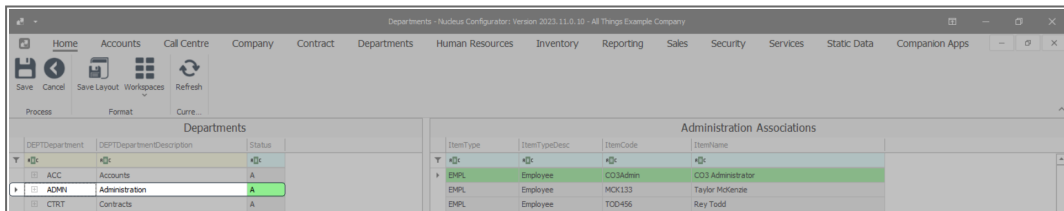
- Click on **OK**.



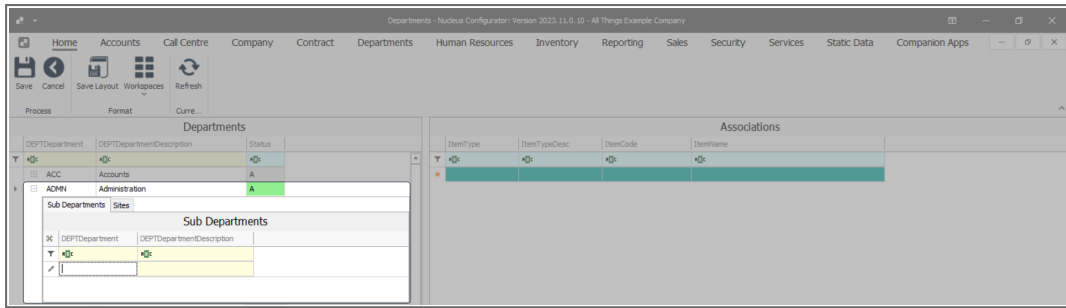
- You will return to the **Departments** screen.
- You can add **Sub Department(s)** and **Association(s)** to this new **Department**.

ADD A SUB DEPARTMENT

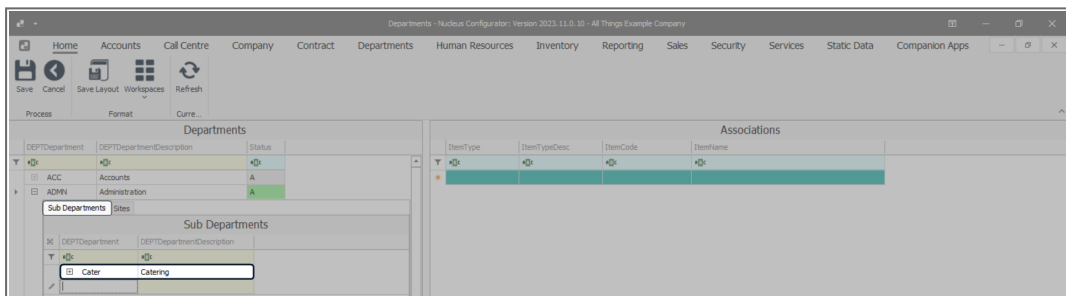
- Click on the **row** of the **Department** you wish to add a **Sub Department** to and click on the **expand** button (+ sign).
- In this image, **Administration Department** has been selected.



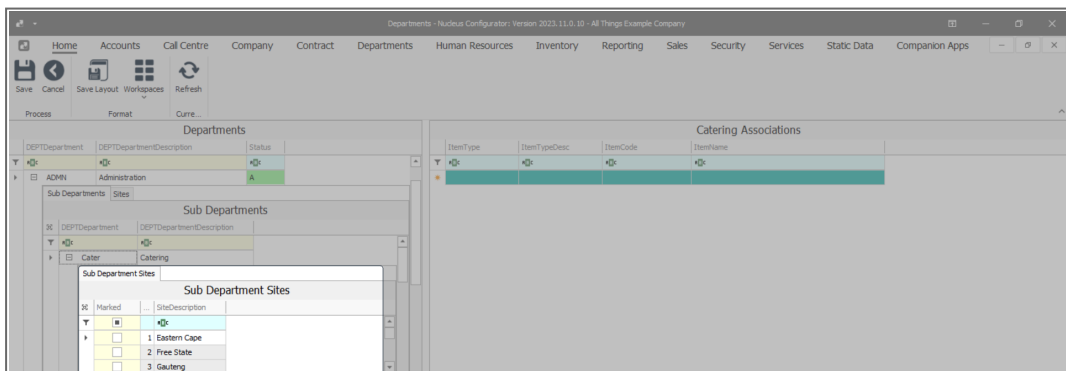
- Click in the **first free row** of the **Sub Departments** panel. This row will now be '**activated**' and you can now add the **new Sub Department** details.



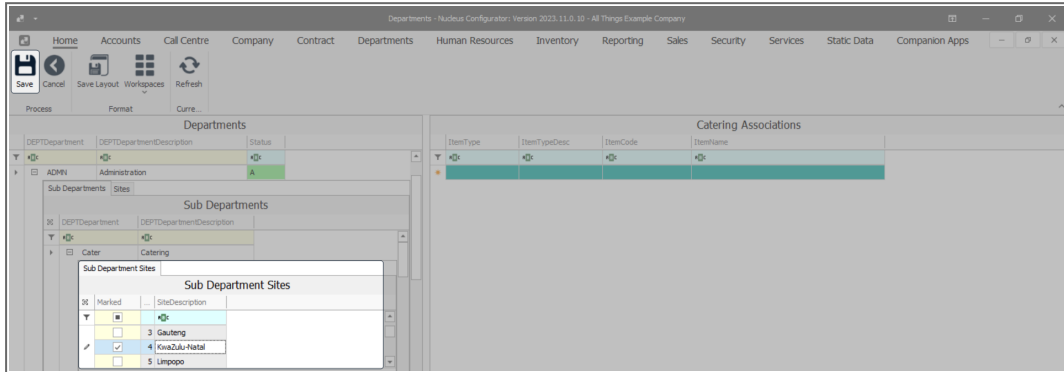
- **DEPTDepartment:** Type in the **code** for this new Department, E.G., Cater for Catering.
- **DEPTDepartmentDescription:** Type in a **description** for this new Department, E.G., Catering.
- Tab over to the next row to be able to click on the **expand** button (+ sign) at the beginning of the new **Sub Department** row.



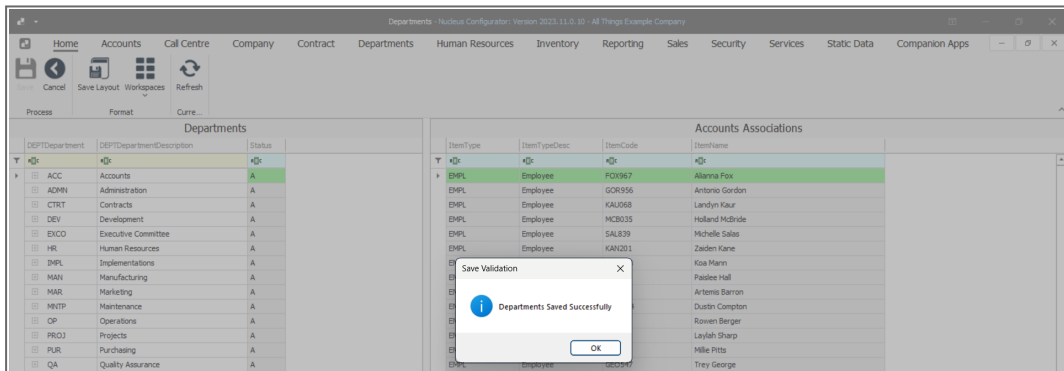
- This will open the **Sub Department Sites** menu.



- Select the **Site(s)** linked to this new **Sub Department**.
- In this example, KwaZulu-Natal has been selected.
- Once you have selected the **Sites**, tab over to the next row and then click on **Save**:



- A Save Validation message will pop up saying -
 - **Departments Saved Successfully.**
- Click on **OK**.



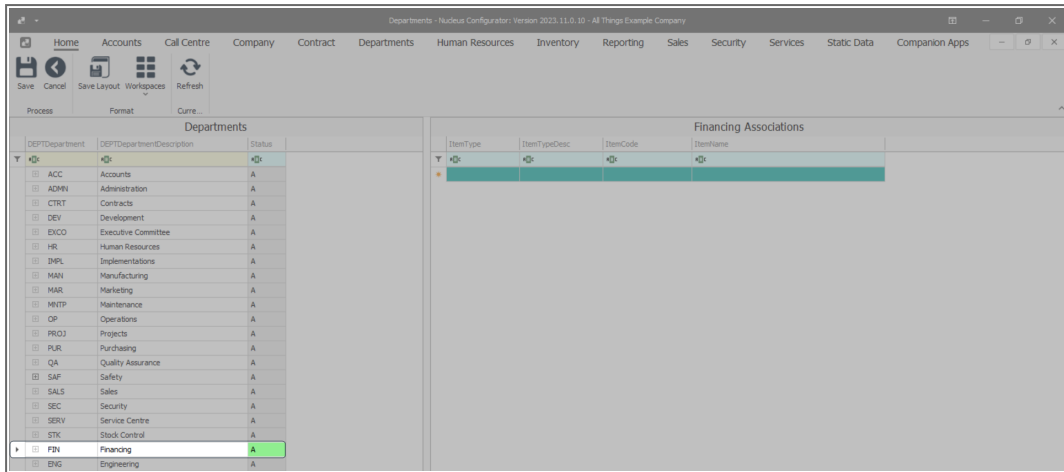
- You will return to the **Departments** screen.
- You can now link **Association(s)** to this **Sub Department**.

ASSOCIATIONS

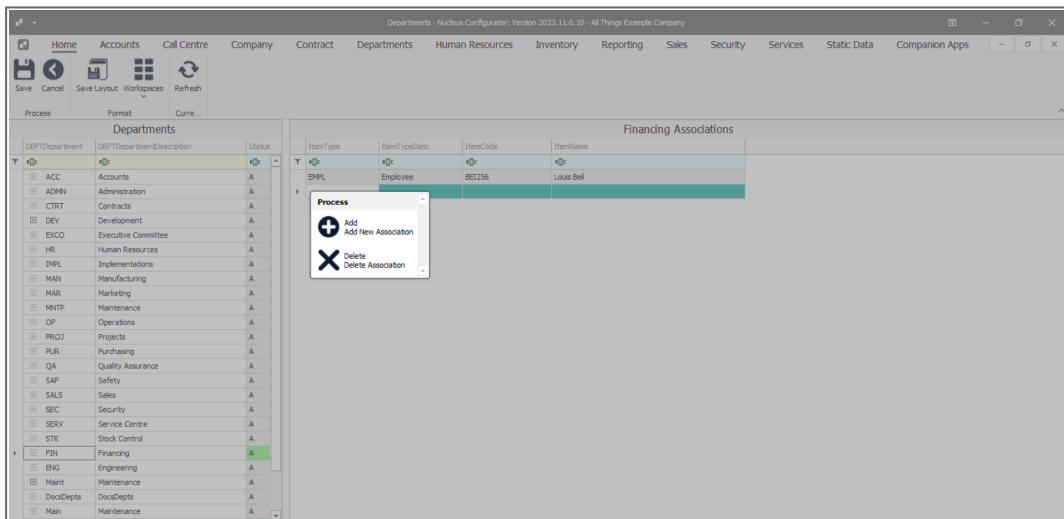
- The following **Associations** can be linked to a **Department** or **Sub Department** :
 - **Asset**
 - **Customer**
 - **Employee**
 - **Functional Location**
 - **Inventory Item**
 - **Project**
 - **Work Order**
- An **Asset** and **Inventory Item** and **Project** and **Work order Association** cannot be deleted or removed from the **Department** it is associated to.
- If you want to change an **Employee's** Department, you can do this through the **Drag and Drop** feature or through **Finance/HR Employees** [Link a Department to an Employee](#).

ADD A DEPARTMENT ASSOCIATION

- In the **Departments** Grid, select the **Department** to link an **Association** to.
- In this example, the **Financing** Department has been selected.

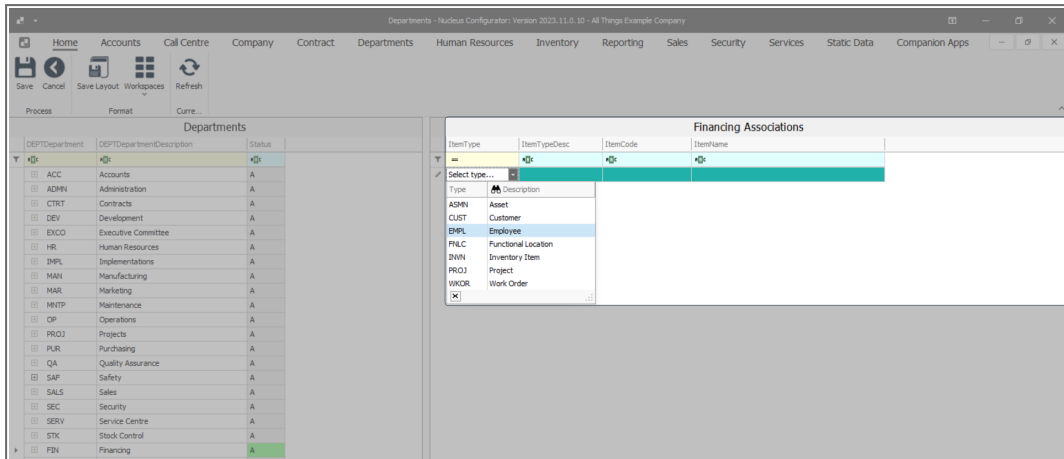


- In the **Associations** Grid - you have two options to add an **Association**.
- You can either right click in one of the rows of the Associations panel to call up the **Process** menu.
- Click on **Add New Association**. A new row will be 'activated' and you can now add the **new** Association details.

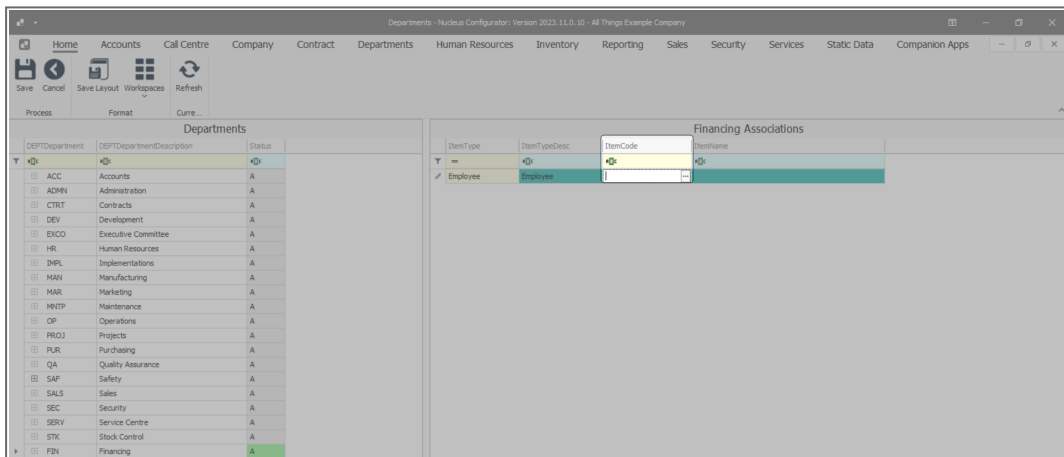


- Or select the first available row to start adding the **new** Association details.
- Click on the drop-down arrow to select the **ItemType**:

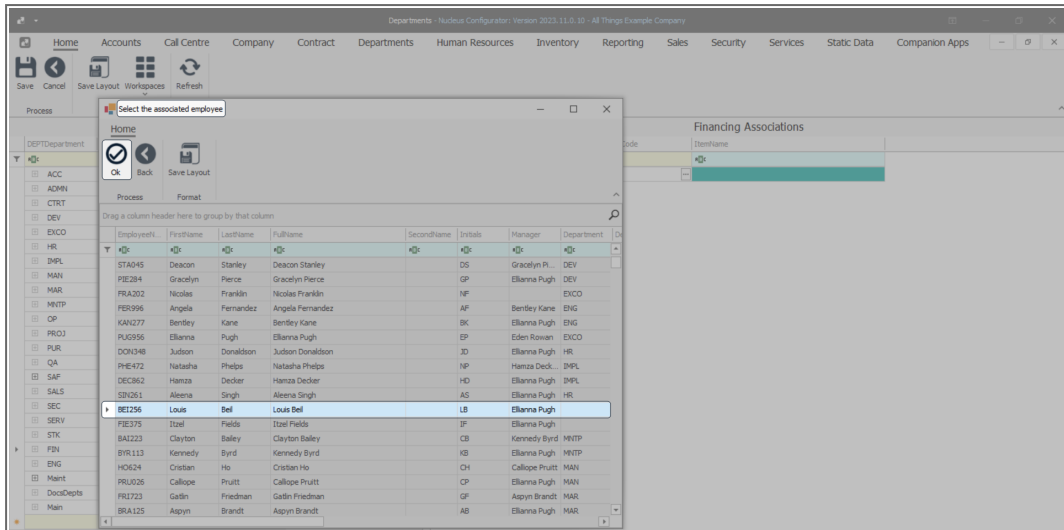
- In this example, **Employee** will be selected.



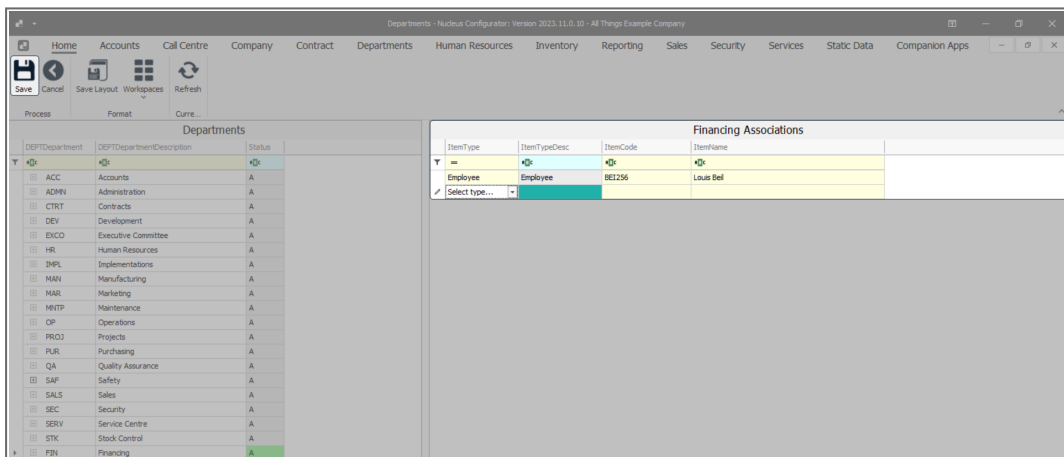
- **ItemTypeDescription:** This field will auto populate according to the **ItemType:** selected.
- **ItemCode:** Click on the Elipsis to call up the menu.



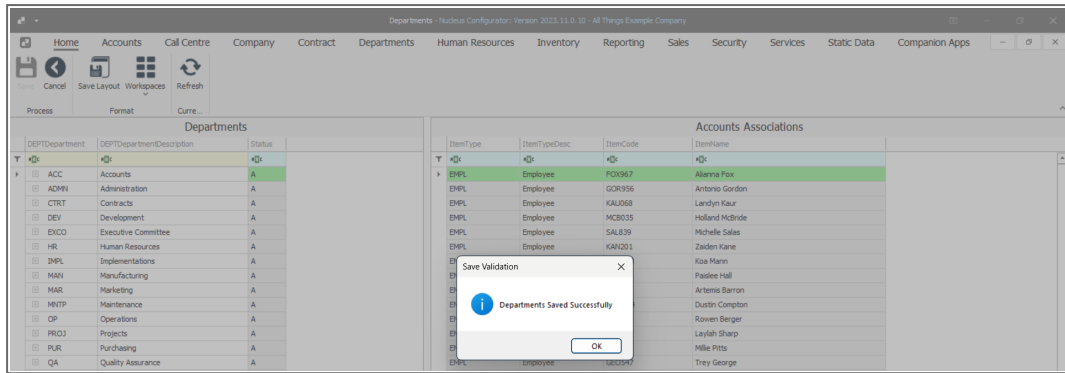
- A screen will pop up where you can select the **Association** to the selected Department.
- In this image, the associated **Employee** will be selected.
- Click on **OK**.



- **ItemName:** This field will populate with the **ItemName** according to the **ItemCode:** selected. In this example, it will be the Employee's name.
- Tab over to the next row and then click on **Save**.



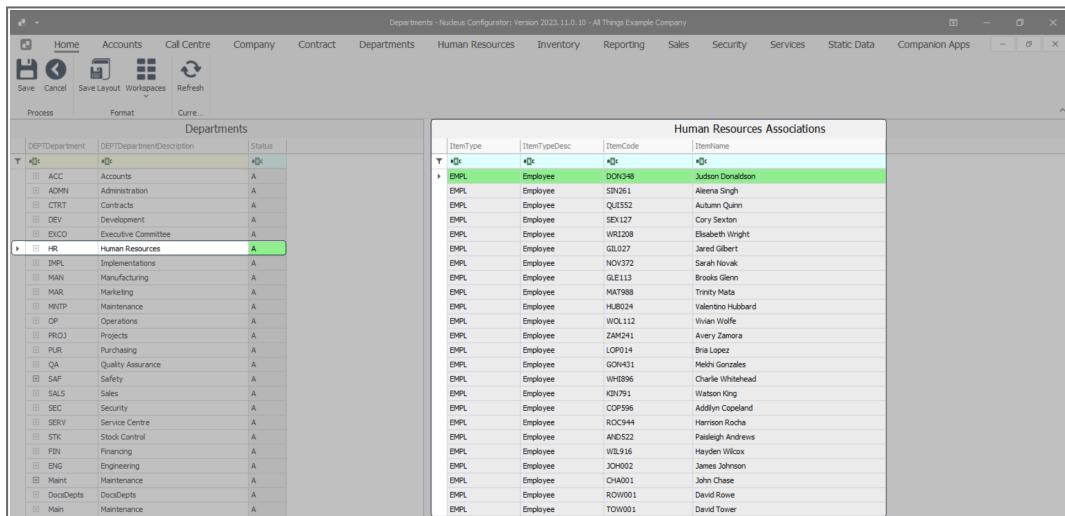
- A Save Validation message will pop up saying -
 - **Departments Saved Successfully.**
- Click on **OK**.



- You will return to the **Departments** screen.

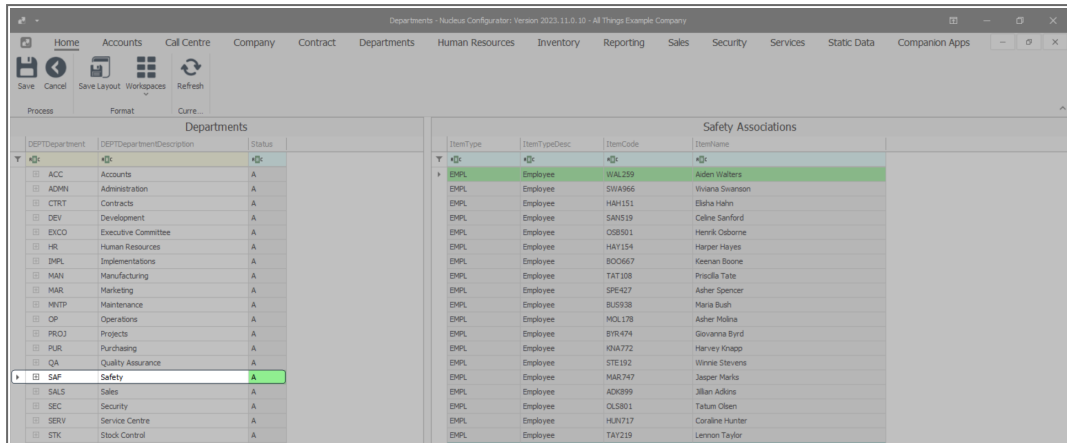
VIEW DEPARTMENT ASSOCIATIONS

- In the **Departments** screen, select the row of a **Department** to display the linked **Associations**.
- In this image, the **Human Resources Department** has been selected and you can view the **Associations** linked to this **Department**.

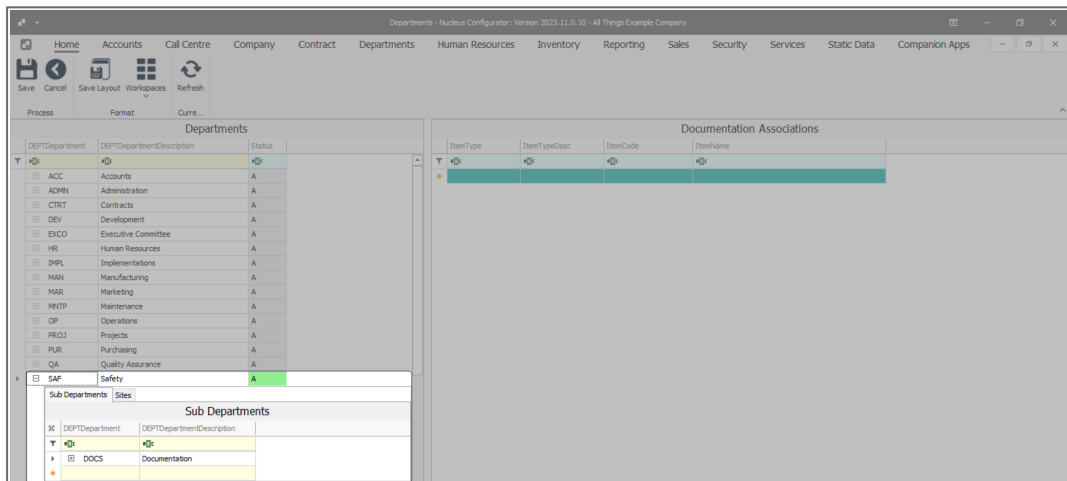


VIEW SUB DEPARTMENTS

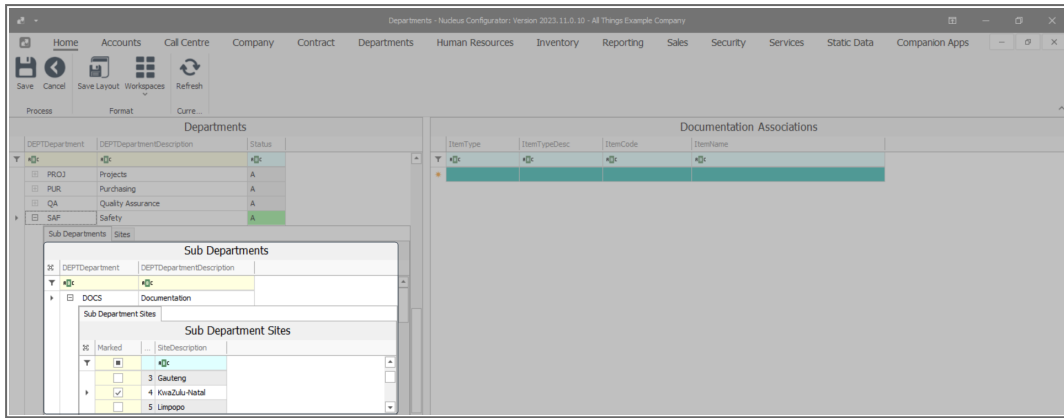
- In the **Departments** Grid, select the row of a **Department** and then click on the **expand** button (+ sign).



- Once you have clicked on the **expand** button (+ sign), the **Sub-Departments** list will open.

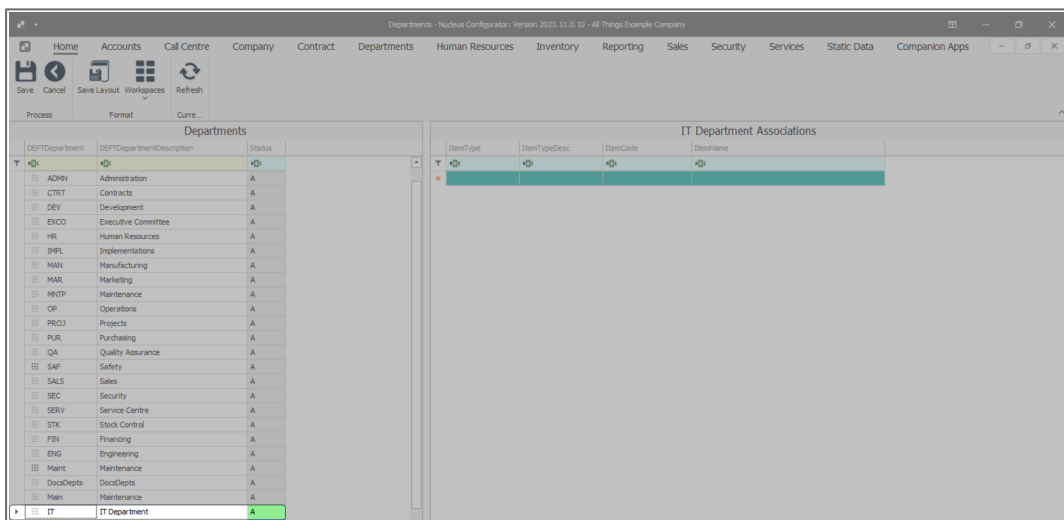


- If you would like to view the **Sites** linked to this **Sub Department**, click on the **+ sign** sign at the beginning of a **Sub-Departments** row.

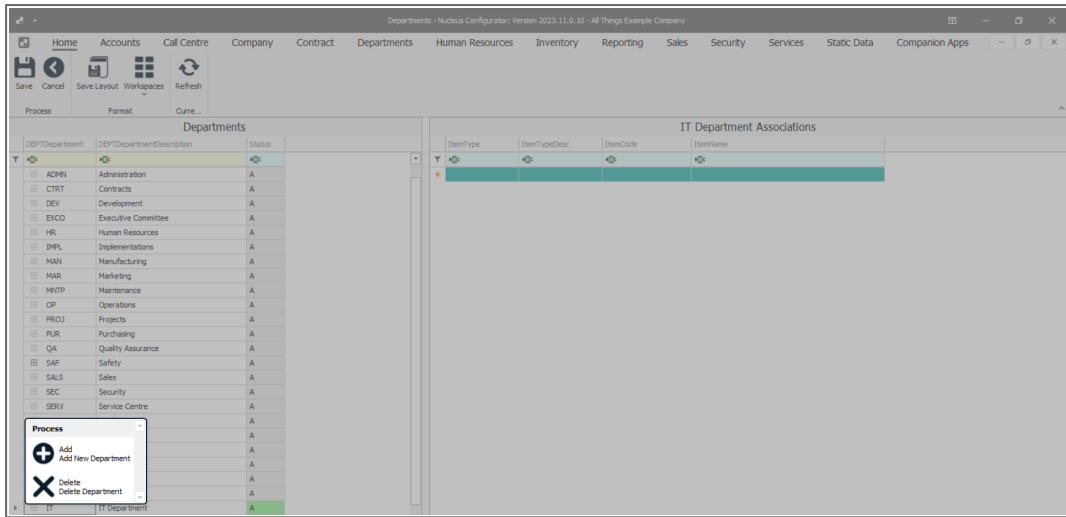


DELETE DEPARTMENT

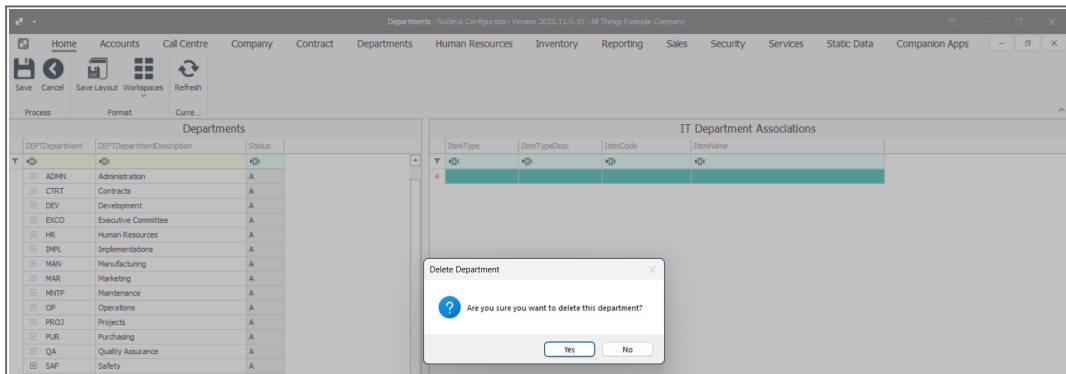
- In the **Departments** screen, select the row of the **Department** you wish to delete.
 - In this image, **IT Department** has been selected.



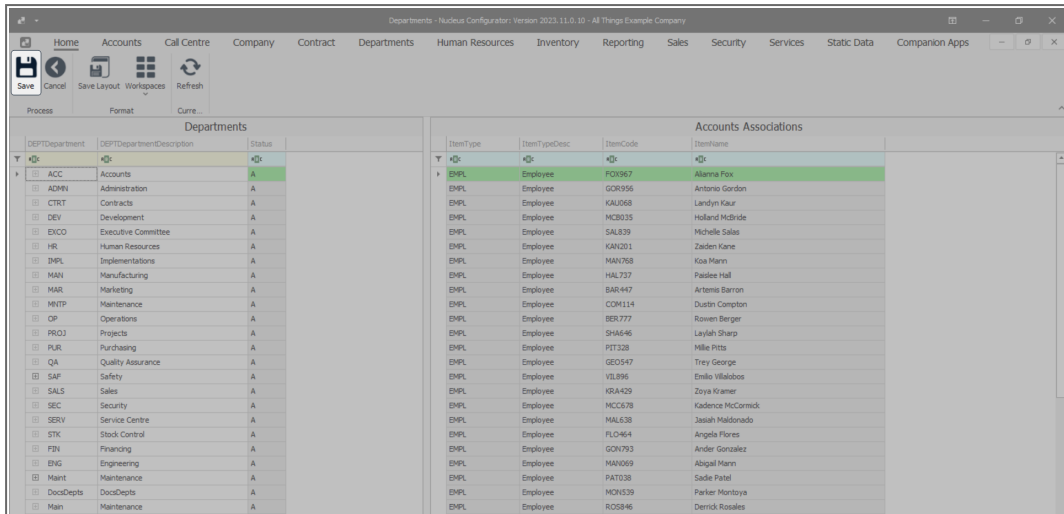
- On the row of the selected **Department**, right click to call up a Process menu and select **Delete Department**.



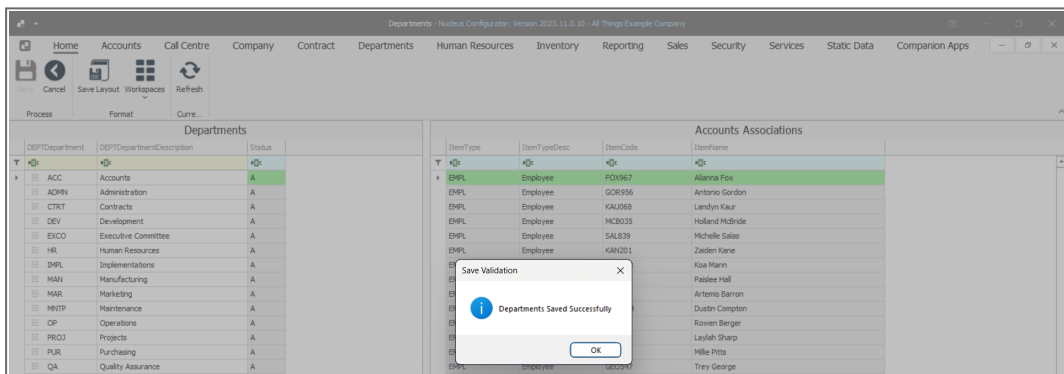
- A Delete Department message will pop up asking -
 - Are you sure you want to delete this Department?
 - Click on Yes.



- You will then -
 - Click **Save** to successfully delete the Department.



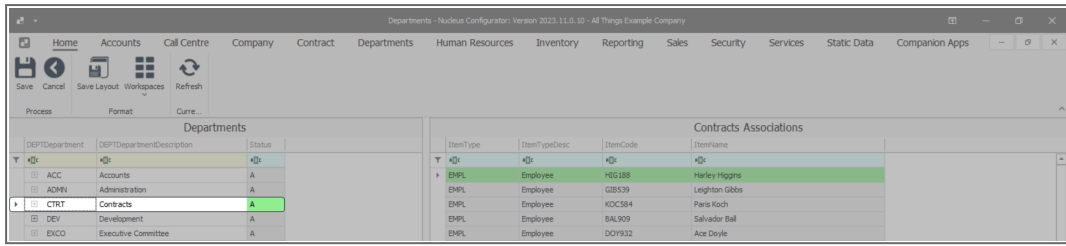
- A Delete Validation message will pop up saying -
 - **Departments Saved Successfully**
 - Click on **OK**.



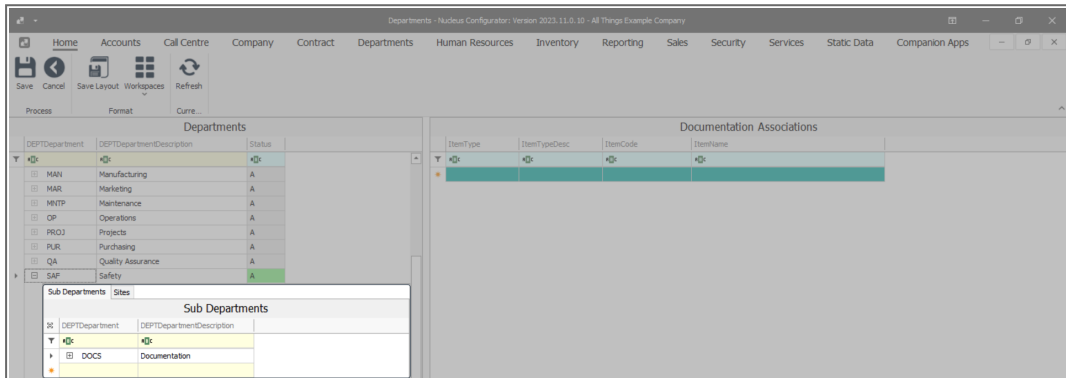
- You will return to the Departments listing screen.

DELETE SUB DEPARTMENT

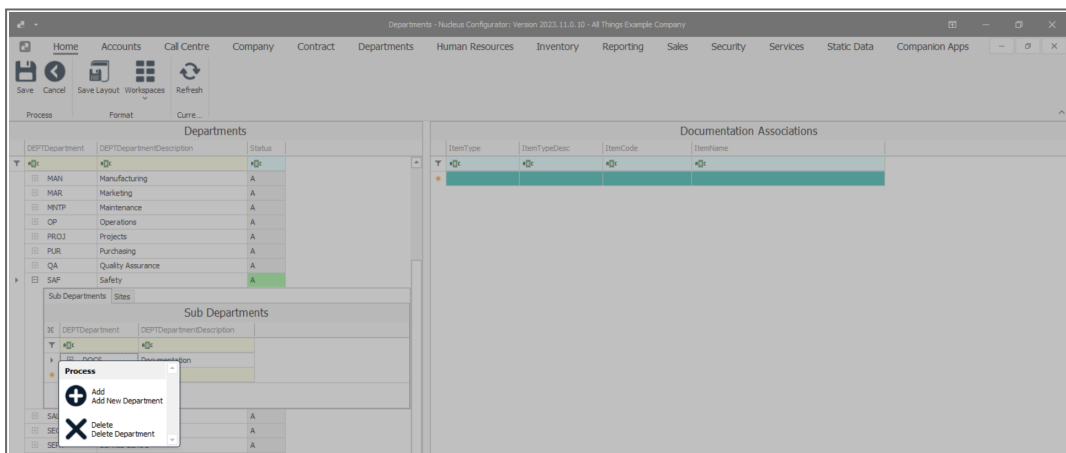
- In the **Departments** screen, select the row of a **Department** you wish to delete the Sub Department from and click on the **expand** button (+ sign).
 - In this image, **Safety Department** has been selected.



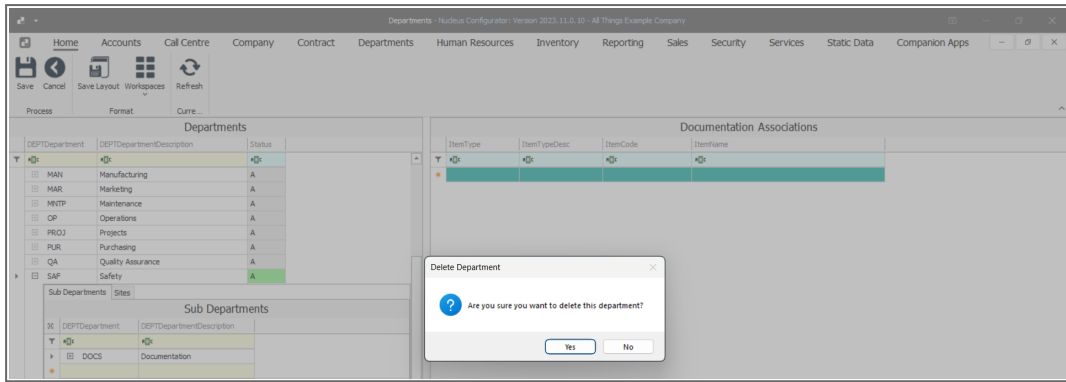
- The **Sub Department** panel will open.



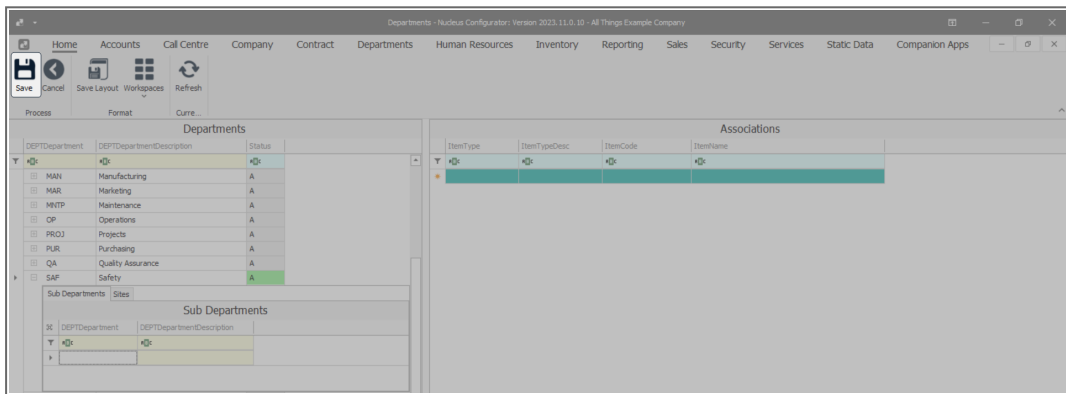
- In the row of the **Sub Department**, right click to call up a Process menu and select **Delete Department**.



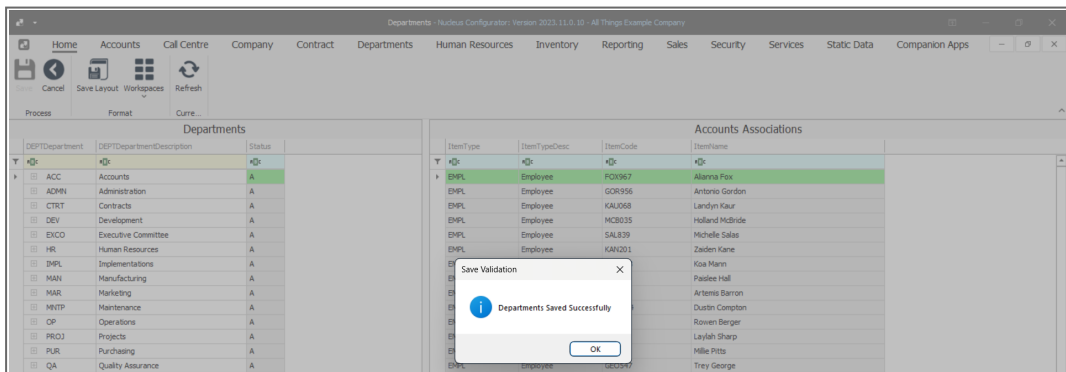
- A Delete Department menu will pop up asking -
 - **Are you sure you want to delete this Department?**
 - Click on **Yes**.



- To successfully delete the **Sub Department** -
 - Click **Save**.



- A Delete Validation message will pop up saying -
 - **Departments Saved Successfully.**
 - Click on **OK**.



- You will return to the Departments listing screen.

SITES

There must be at least one **Site** linked to each **Department** and **Sub Department**.

A **Site** is added or edited by clicking on the **expand** button (+ sign) at the beginning of the row.

EDIT A DEPARTMENT SITE

- In the **Departments** Grid, select the row of a **Department** you wish to edit.
- In this image, **Contracts Department** has been selected.
- Click on the **expand** button (+ sign).

DEPTDepartment	DEPTDepartmentDescription	Status
ACC	Accounts	A
ADMIN	Administration	A
CTRT	Contracts	A
DEV	Development	A
EXCO	Executive Committee	A

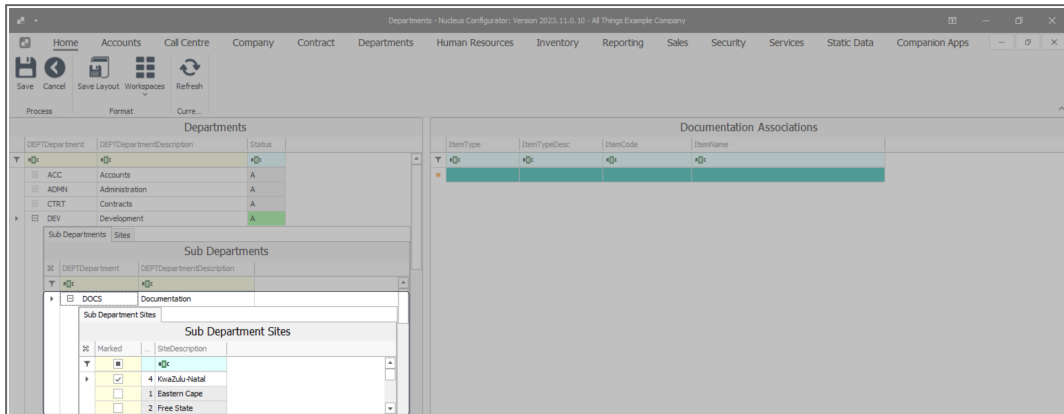
Item Type	Item Type Desc	Item Code	Item Name
EMPL	Employee	STA045	Deacon Stanley
EMPL	Employee	PIE284	Gracyn Pierce
EMPL	Employee	LONG14	Abby Long
EMPL	Employee	SP636	Jace Spencer
EMPL	Employee	SH4692	Ray Sheffer

- Once you have clicked on the **expand** button (+ sign), the **Sub Departments** and **Sites** panel will open.
- Click on the **Sites** panel to open the **Site(s)** menu.

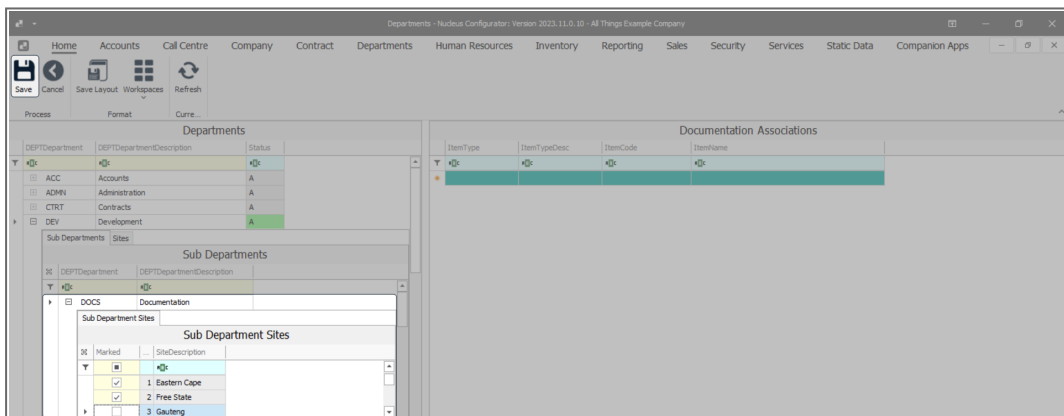
DEPTDepartment	DEPTDepartmentDescription	Status
ACC	Accounts	A
ADMIN	Administration	A
CTRT	Contracts	A
DEV	Development	A
EXCO	Executive Committee	A

Item Type	Item Type Desc	Item Code	Item Name
EMPL	Employee	STA045	Deacon Stanley
EMPL	Employee	PIE284	Gracyn Pierce
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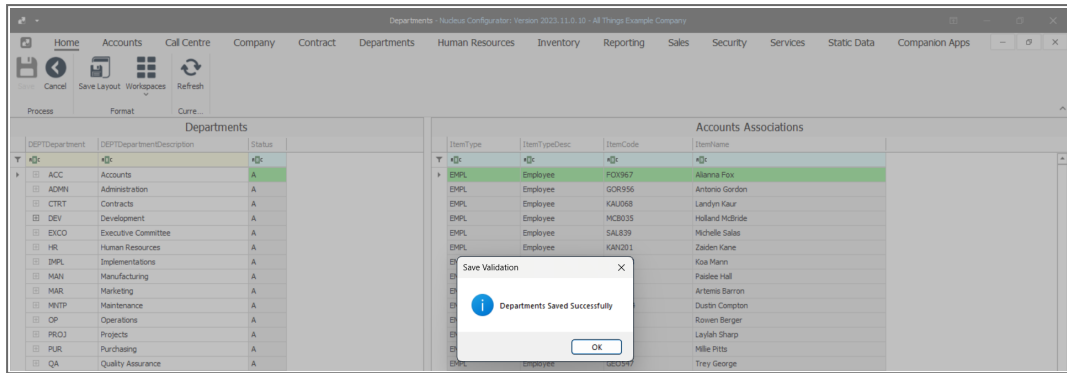
- This image shows Kwa-Zulu Natal Site is linked to this Sub Department.



- To edit the **Site(s)**, you can tick or untick a Check box.
- In this image, Eastern Cape and Free State been selected. Once you have made the changes, you can either tab over to the following row or click in the blank area next to the Sites panel and then click **Save**.



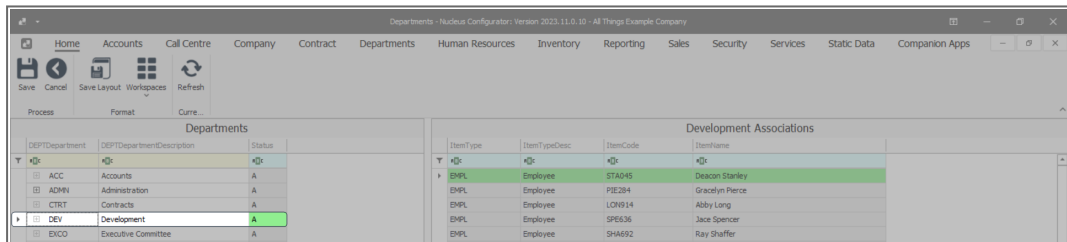
- A Save Validation message will pop up saying -
 - **Departments Saved Successfully.**
- Click on **OK**.



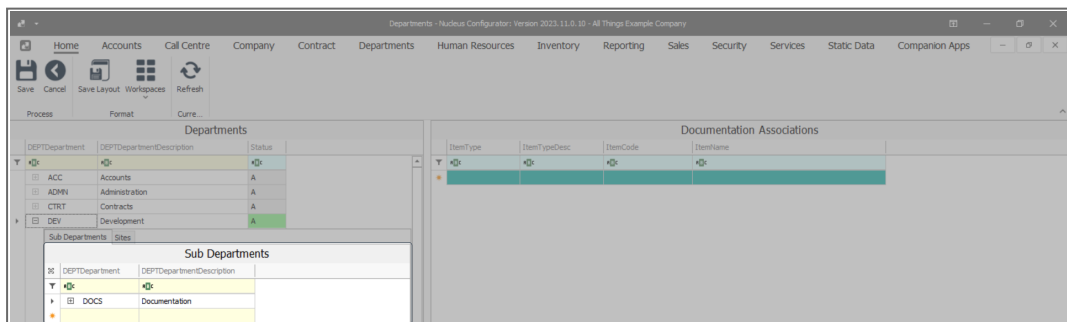
- You will return to the **Departments** screen.

EDIT A SUB DEPARTMENT SITE

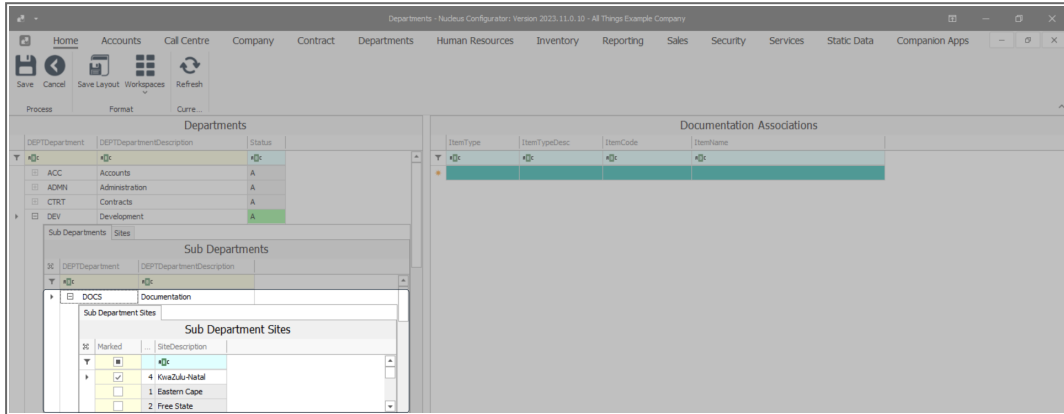
- In the **Departments** screen, select the row of a **Department** that the **Sub Department** is linked to.
- In this image, **Development Department** has been selected.
- Click on the **expand** button (+ sign).



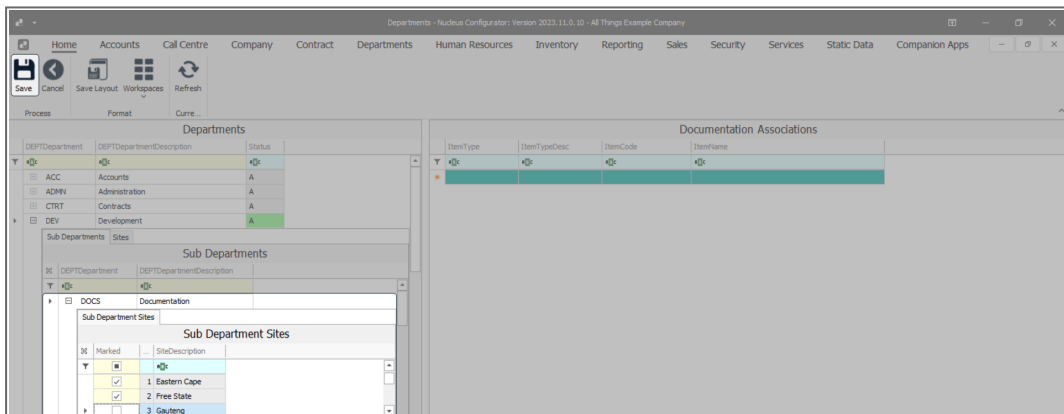
- Once you have clicked on the **expand** button (+ sign), the **Sub Departments** menu will open.



- Select the row of the **Sub Departments** you wish to edit and click on the **expand** button (+ sign).
- The **Sub Departments Sites** panel will open.
- This image shows Kwa-Zulu Natal Site is linked to this Sub Department.



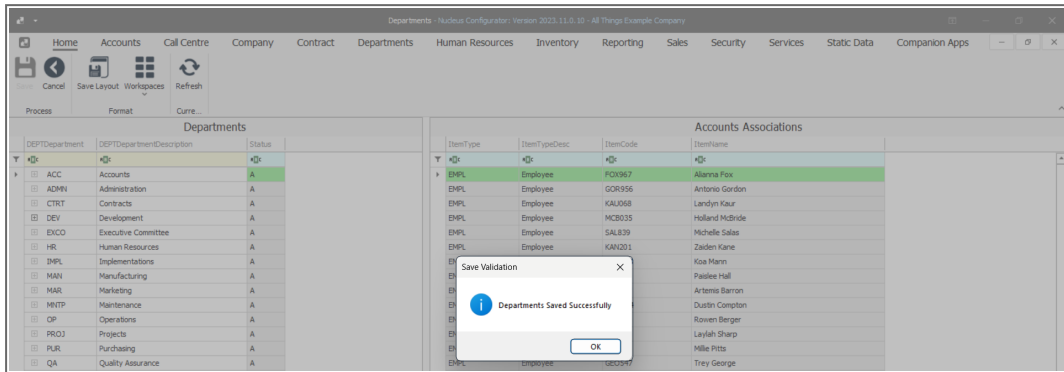
- To edit the **Site(s)**, you can tick or untick a Check box.
- In this image, Eastern Cape and Free State have been selected.



- Once you have made the changes, you can either tab over to the following row or click in the blank area next to the Sites panel and then click **Save**.
- A Save Validation message will pop up saying -

- **Departments Saved Successfully.**

- Click on **OK**.

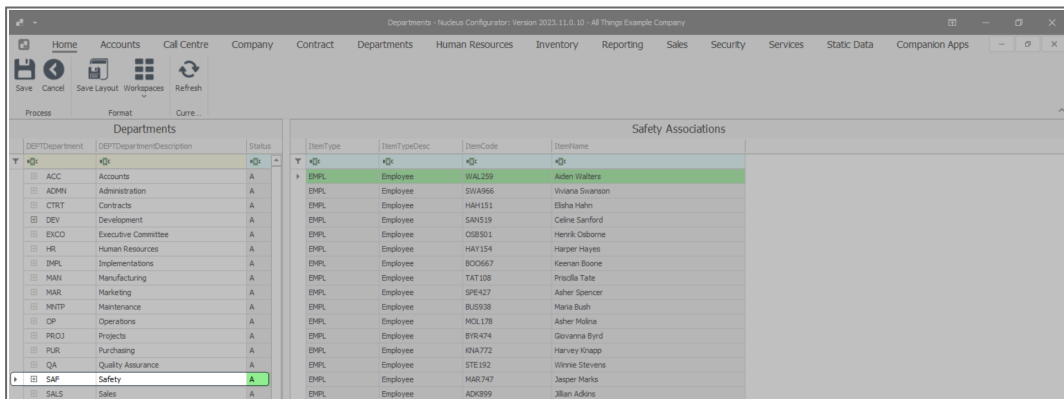


- You will return to the **Departments** screen.

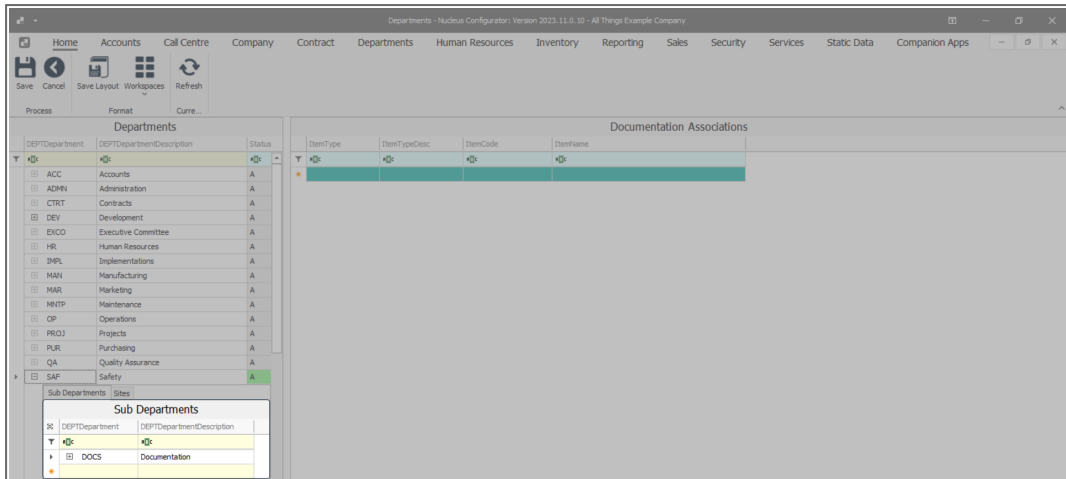
DRAG AND DROP FEATURE – SUB DEPARTMENT

You have the option to make use of the **drag and drop feature** to drag a **Sub Department** to a **Department**.

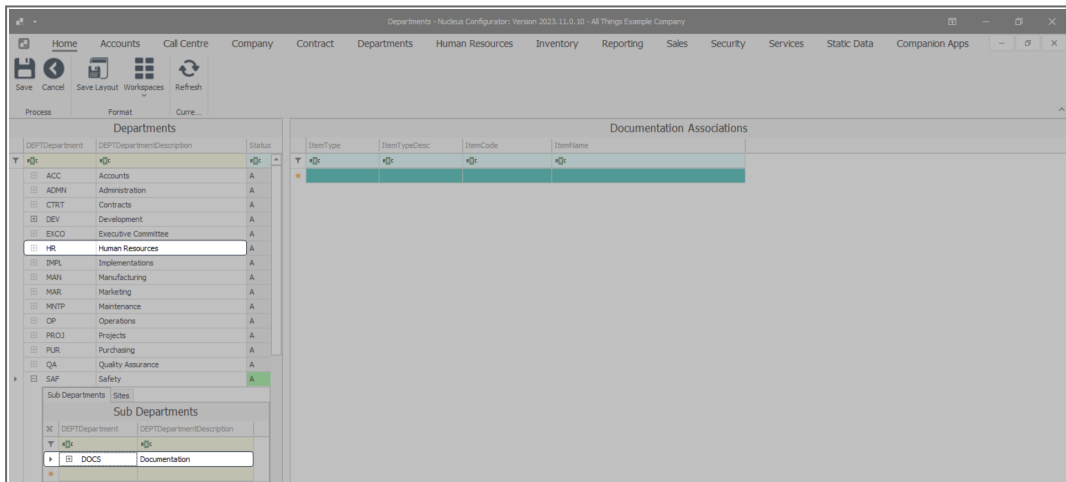
- Click on the **expand** button (+ sign) of a **Department** to open the **Sub Department** panel.



- Once you have clicked on the **expand** button (+ sign), the **Sub Departments** panel will open.



- Click on the arrow at the beginning of the **Sub Department** row that you wish to move, and drag the **Sub Department** row to the expand button of the **Department** you wish to move this **Sub Department** to.
- This image shows the Documentations Sub Department has been selected to be moved to the Human Resources Department.



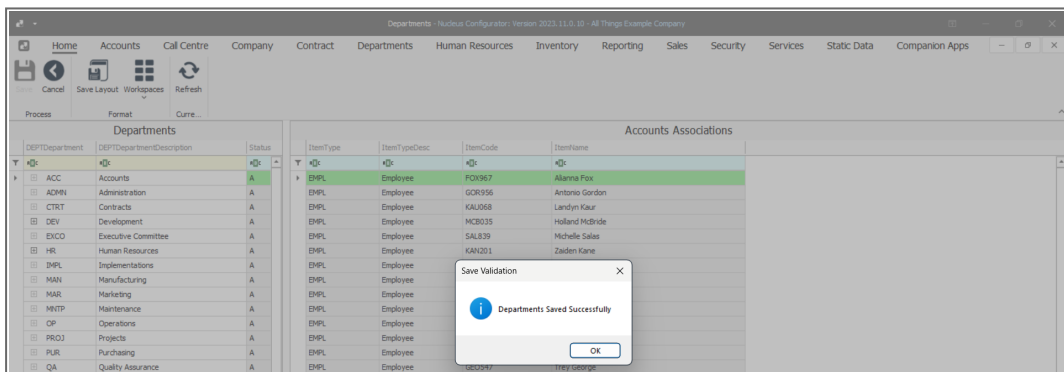
- If you have not dragged the Sub Department to the correct Department, you will click on **Refresh** to start again.



- If you are happy that the Sub Department has been moved to the correct Department, you will click on **Save** for the move to be successful.



- Once you have clicked on **Save**, a Save Validation message will pop up saying -
 - **Departments Saved Successfully.**
- Click on **OK**.

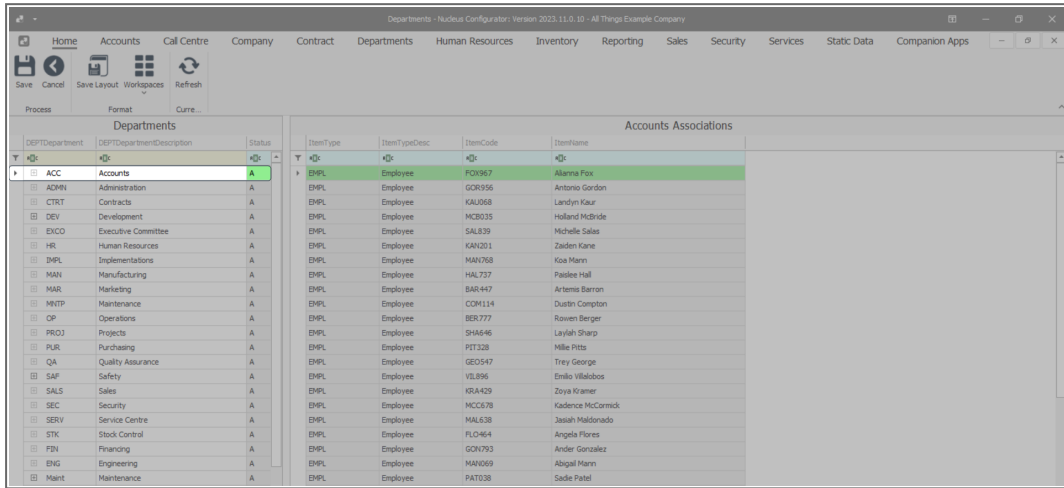


- You will return to the **Departments** screen.

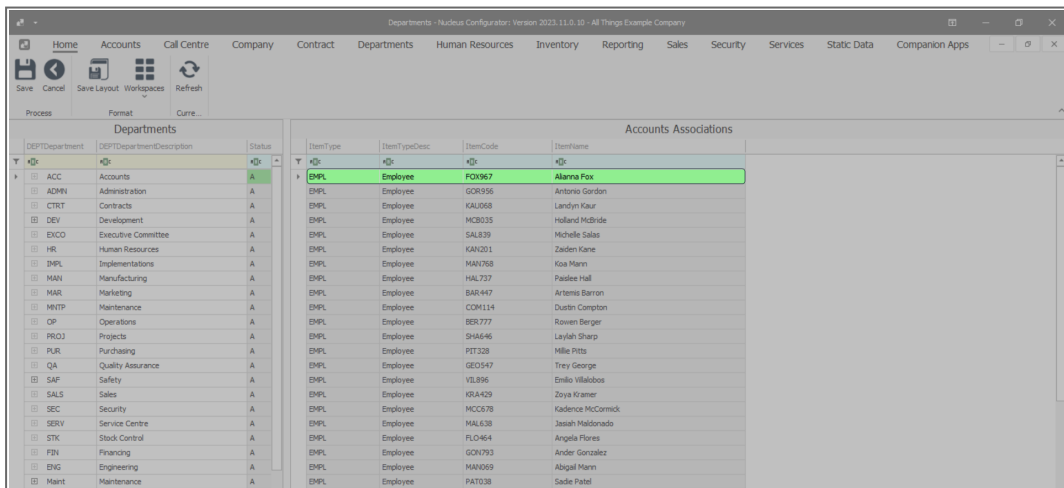
DRAG AND DROP FEATURE – ASSOCIATION

You have the option to make use of the **drag and drop feature** to drag an **Association** to a different **Department** or **Sub Department**.

- In the **Departments** Grid, select the **Department** to choose an **Association** to move.
- In this example, the **Accounts** Department has been selected.



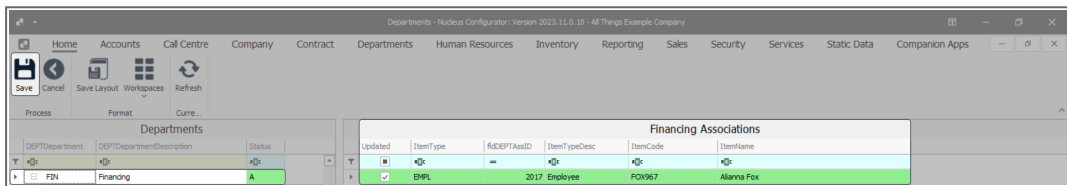
- Select the **Association** you wish to **drag and drop** and click on the arrow at the beginning of the **Association** row and drag the **Association Row** over to the **Department**, or **Sub Department**, you wish to move this **Association** to
- This image shows that the Employee **Alianna Fox** has been selected to be moved to the Human Resources Department.



- If you have not dragged the Association to the correct Department, you will click on **Refresh** to start again.



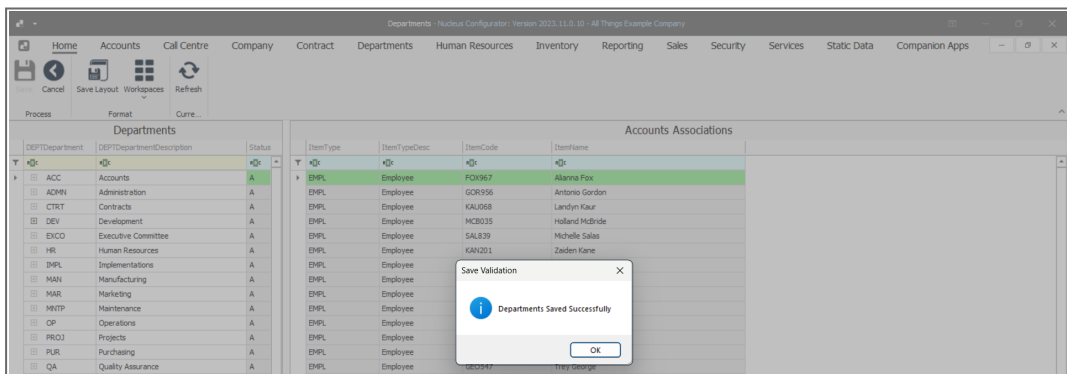
- If you are happy that the Association has been moved to the correct Department, you will click on **Save** for the move to be successful.



- Once you have clicked on Save, a Save Validation message will pop up saying -

- **Departments Saved Successfully.**

- Click on **OK**.



- You will return to the **Departments** screen.

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