

# Adding a New Department to ChartField Definitions

**Purpose:** Use this document to add departments for colleges.

**Audience:** Finance staff

**!** You must have at least one of these local college managed security roles:

- ZD GL Local Config Inquiry
- ZZ GL Local Configuration

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

## Adding a New Department to ChartField Definitions

**Navigation:** Set Up Financials/Supply Chain > Common Definitions > Design ChartFields > Define Values > Define ChartField Values.

**!** **Caution:** A NEW department must start the first day of the new fiscal year, i.e. **07/01/20XX**. If the current date is used, various trees and reports may not contain the departments as they will be outside of its criteria's scope.

1. The **Define ChartField Values** page displays.
2. Select the **Department** link.
3. The **Department** search page displays.
4. Select the **Add a New Value** tab.
5. Enter Business Unit in the **SetID** field.
6. Enter the new **Department** number.
7. Select **Add**.



11. Process complete.

## Editing Existing Departments

!

When editing an existing Department (for example adding a new Department Manager), add a new line with an effective date equal to the update.

1. From the **Department** main page, select the **Add a New Value** **[+]** icon to create another record.

2. Select the **View All** link to view all records.

Department

SetID

WA020

Department

56789

Effective Date

Q

|

|<

<

1 of 2

>

|>

|

View All

\*Effective Date

10/17/2023

\*Status

Active

\*Description

Japanese Language

\*Short Description

JAPAN

Manager ID

101000000

Q

Attributes

Long Description

+

-

☐ Budgetary Only

Manager Name

McCarville, Jane M

Save

Notify

Add

Update/Display

Include History

Correct History

10. The new **Effective Date** row defaults to current date.

11. Update the new record criteria as needed. Example below updates the **Manager ID**.

12. Select the **Save** button.

Department

SetID WA020

Department 56789

Effective Date

10/17/2023

1-2 of 2

View 1

\*Effective Date

10/17/2023

\*Status

Active

\*Description

Japanese Language

\*Short Description

JAPAN

Manager ID

101000002

Manager Name

Kimm,Linda

Attributes

Long Description

+

-

☐ Budgetary Only

\*Effective Date

07/01/2023

\*Status

Active

\*Description

Japanese Language

\*Short Description

JAPAN

Manager ID

101000000

Manager Name

McCarville,Jane M

Attributes

Long Description

+

-

☐ Budgetary Only

Save

Notify

Add

Update/Display

Include History

Correct History

## Inactivating Departments

⚠ Please contact **SBCTC Accounting** prior to inactivating a Department for it may impact Financials.

Please do not inactivate the **previous year** as this will lead to issues with closing. If you want to inactivate a department, this should also be done with the beginning of a fiscal year. In this instance, you would create a new line item by using the plus sign and make the new line with the status of inactive.

⚠ Before inactivating a department, please make sure all data has been transferred.

1. From the **Department** main page, select the **View All** link to view all records.
2. Select the **plus icon [ + ]** to add a new record, it will default to current date.

Department

SetID WA020

Department 67892

Effective Date

Q

|

|<

<

1 of 2

>

|>

|

View All

\*Effective Date

10/17/2023

Calendar icon

\*Status

Active

Dropdown arrow

\*Description

Student Group: Muggles

\*Short Description

MUGGLES

Manager ID

101000000

Q

Manager Name

McCarville, Jane M

Attributes

Long Description

+

-

☐ Budgetary Only

- To retain history, change the status of the new record to **Inactive** of the prior date department.
- Select the **Save** button.

Department

SetID WA020

Department 67892

Effective Date

Q

|

|<

<

1-2 of 2

>

|>

|

View 1

\*Effective Date

07/01/2023

Calendar icon

\*Status

Inactive

Dropdown arrow

\*Description

Student Group: Muggles

\*Short Description

MUGGLES

Manager ID

101000000

Q

Manager Name

McCarville, Jane M

Attributes

Long Description

+

-

☐ Budgetary Only

\*Effective Date

07/01/2020

Calendar icon

\*Status

Active

Dropdown arrow

\*Description

Student Group: Muggles

\*Short Description

MUGGLES

Manager ID

101000000

Q

Manager Name

McCarville, Jane M

Attributes

Long Description

+

-

☐ Budgetary Only

Save

Notify

Add

Update/Display

Include History

Correct History

5. Process complete.

## Video Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

## Video Tutorial Via Panopto

View the external link to [Adding a New Department to ChartField Definitions](#). This link will open in a new tab/window.