

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**.

← ChartField Values Department

Department

Find an Existing Value Add a New Value

*SetID

*Department

Add

[Find an Existing Value](#) | [Add a New Value](#)

8. The **Department** page displays.
9. Enter the following information;
 - **Effective Date** = 07/01/20XX
 - **Status** = Active
 - **Description**
 - **Short Description**
 - **Manager ID**
10. Select **Save**.

← ChartField Values Department

Department

SetID WA020 Department 56789

Effective Date 1 of 1 | View All

*Effective Date
Attributes
Long Description
+ -

*Status
 Budgetary Only

*Description

*Short Description

Manager ID
Manager Name McCarville, Jane M

Save Notify
Add
Update/Display
Include History
Correct History

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.

The screenshot shows the 'Department' form with the following details:

- SetID: WA020
- Department: 56789
- Effective Date: 10/17/2023
- Status: Active
- Description: Japanese Language
- Short Description: JAPAN
- Manager ID: 101000000
- Manager Name: McCarville, Jane M

At the bottom of the form, there are buttons for 'Save', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'. A 'View All' link is also visible in the top right corner of the form area.

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 1-2 of 2 View 1

*Effective Date	10/17/2023	Attributes	Long Description	+ -
*Status	Active	<input type="checkbox"/> Budgetary Only		
*Description	Japanese Language			
*Short Description	JAPAN			
Manager ID	101000002	Manager Name	Kimm,Linda	

*Effective Date	07/01/2023	Attributes	Long Description	+ -
*Status	Active	<input type="checkbox"/> Budgetary Only		
*Description	Japanese Language			
*Short Description	JAPAN			
Manager ID	101000000	Manager Name	McCarville,Jane M	

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 1 of 2 [View All](#)

*Effective Date 10/17/2023 Attributes Long Description [+](#) [-](#)

*Status Active Budgetary Only

*Description Student Group: Muggles

*Short Description MUGGLES

Manager ID 101000000 Manager Name McCarville, Jane M

- 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 1-2 of 2 [View 1](#)

*Effective Date 07/01/2023 Attributes Long Description [+](#) [-](#)

*Status Inactive Budgetary Only

*Description Student Group: Muggles

*Short Description MUGGLES

Manager ID 101000000 Manager Name McCarville, Jane M

*Effective Date 07/01/2020 Attributes Long Description [+](#) [-](#)

*Status Active Budgetary Only

*Description Student Group: Muggles

*Short Description MUGGLES

Manager ID 101000000 Manager Name McCarville, Jane M

[Save](#) [Notify](#) [Add](#) [Update/Display](#) [Include History](#) [Correct History](#)

- 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.