

GL.010.009 – ADD A NEW DEPARTMENT CHARTFIELD

Purpose	<ul style="list-style-type: none"> To add a department. To identify the navigation to add a new department ChartField. To identify the required information to add a new department.
Description	Accounting adds departments on an as-needed basis, such as when a new university organization is established and a new department might be needed. The Department ID, Effective Date, Status, Description, Short Description, and Manager ID are required when creating a new department.
Security Role	BOR_GL_CHARTFIELDS
Dependencies/Constraints	<ul style="list-style-type: none"> Review any applicable trees containing department information and add the new department to the appropriate trees if needed. Add new Budgets before transactions can be posted against new Departments.
Additional Information	None

Procedure

Below are step by step instructions on how to add a new department. Users also designate a department manager to this new department.

Step	Action
1.	Click the NavBar icon.
2.	Click the Menu icon.
3.	Click the Set Up Financials/Supply Chain link.
4.	Click the Common Definitions link.
5.	Click the Design ChartFields link
6.	Click the Define Values link.
7.	Click the Define ChartField Value link. The system navigates to the ChartField Values page.
8.	Click the Department link. The system navigates to the Department page.
9.	Click the Add a New Value tab.
10.	Enter a Department value in the Department field.
11.	Click the Add button. The system navigates to the Department Details page.
12.	Enter a Date in the Effective Date field.
13.	Enter a Description in the Description field.
14.	Enter a Short Description in the Short Description field.
15.	Use the search icon in the Manager field to add Project Manager to the Manager Field. The system generates the Look Up Manager popup window. <i>Note: The Department Manager field is required for workflow purposes. For transactions to route for approval in eProcurement, the Manager field must be populated. Otherwise, transactions route to the Workflow Administrator.</i>
16.	Either enter a Project Manager name or open search for the Project Manager.
17.	Click an entry in the Name column. The system navigates back to the ChartField Values page.
18.	Verify the correct Project Manager populated in the Manager Name field.
19.	Click the Save button.
20.	Review all department budget and reporting trees. Add new department value to appropriate trees, if needed.
21.	Once a department is created, the department must be funded via budget journals or budget transfers to spend funds.

Step	Action
22.	<p>Run the General Ledger Build Combination Data process. Refer to GL.030.006 – Running Build Combination Data for more information.</p> <p>Note: The COA_COMBO1_BOR table may need to be updated if the department is used in the Banner system and/or OneUSG Connect. For more information, refer to GL.030.007 - Updating COA_COMBO1 BOR TABLE.</p>