Manage Departments

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Permissions

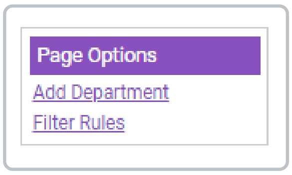
You will require an Access Role with the following permissions:

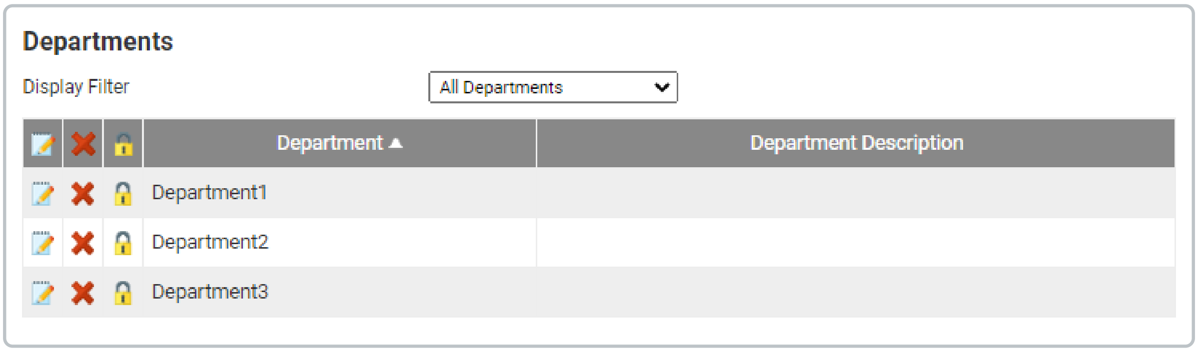
- General Options
- Employees
- Departments

Add a Department

1. Navigate from the **Home** page to **Administrative Settings | Base Information | Departments**. This will display a list of the existing departments configured by your organisation.

2. Click **Add Department** from the 'Page Options' menu.





3. Define the following information:

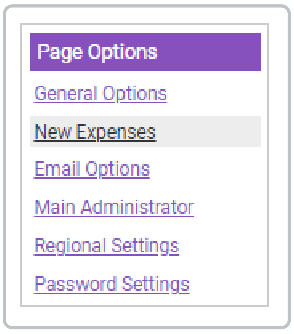
Field	Description
Department	Enter the name of the department.
Description	Enter a description of the department to help users differentiate from other departments.

4. Click **Save** to store the department. This will now display in the list of existing departments on the Departments menu.

Configuring the General Options

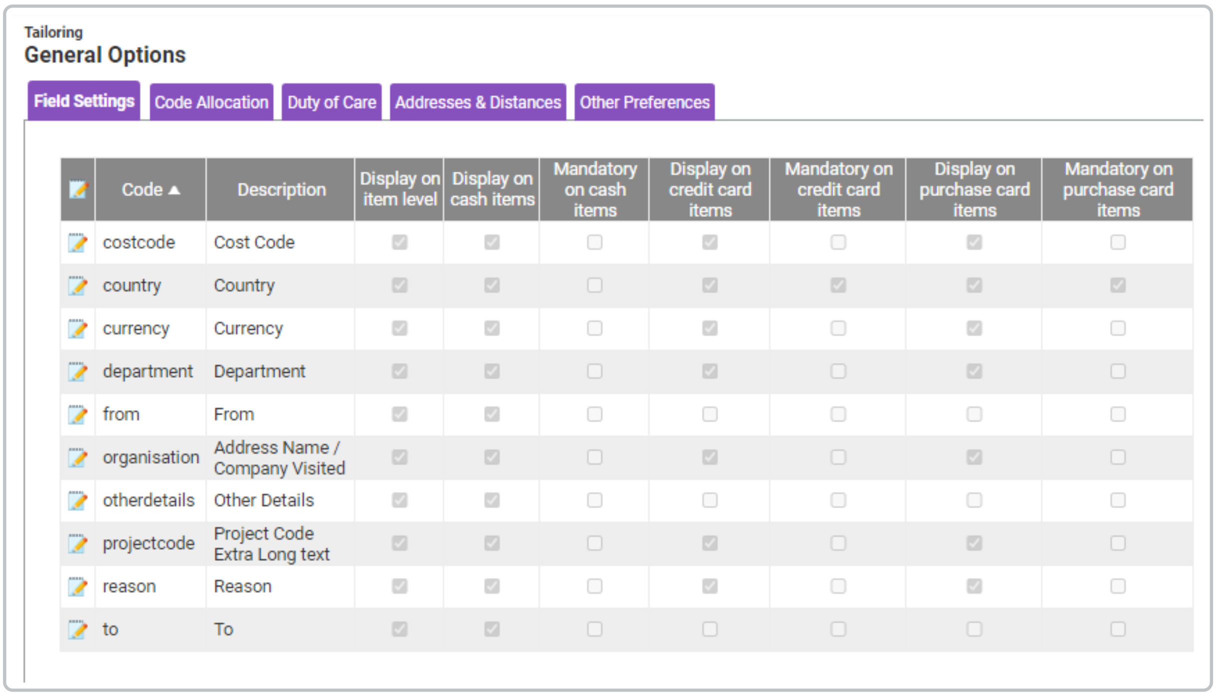
1. Navigate from the **Home** page to **Administrative Settings | Tailoring | General Options**.

2. Click **New Expenses** from the 'Page Options' menu.



3. Within the **Field Settings** tab, the grid shows which fields are displayed on the Add/Edit Expense page.

4. Click next to the department field.


Tailoring

General Options

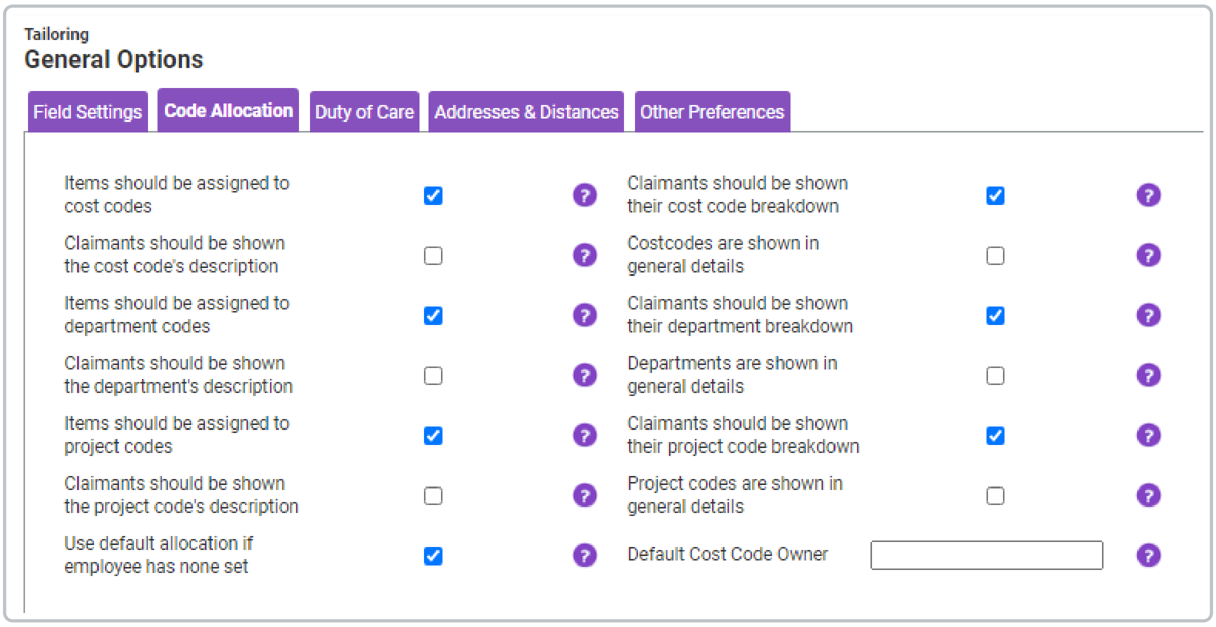
Field Settings | Code Allocation | Duty of Care | Addresses & Distances | Other Preferences

	Code ▲	Description	Display on item level	Display on cash items	Mandatory on cash items	Display on credit card items	Mandatory on credit card items	Display on purchase card items	Mandatory on purchase card items
	costcode	Cost Code	☑	☑	☐	☑	☐	☑	☐
	country	Country	☑	☑	☐	☑	☑	☑	☑
	currency	Currency	☑	☑	☐	☑	☐	☑	☐
	department	Department	☑	☑	☐	☑	☐	☑	☐
	from	From	☑	☑	☐	☐	☐	☐	☐
	organisation	Address Name / Company Visited	☑	☑	☐	☑	☐	☑	☐
	otherdetails	Other Details	☑	☑	☐	☐	☐	☐	☐
	projectcode	Project Code Extra Long text	☑	☑	☐	☑	☐	☑	☐
	reason	Reason	☑	☑	☐	☑	☐	☑	☐
	to	To	☑	☑	☐	☐	☐	☐	☐

5. Define the following options:

Option	Description
Display on item level	Display the department allocation under the individual Expense Item on the Add/Edit Expense page.
Display on cash items	Display the department allocation on cash expenses.
Mandatory on cash items	It is mandatory to select a department for cash expenses.
Display on credit card items	Display the department allocation on credit card expenses.
Mandatory on credit card items	It is mandatory to select a department on credit card expenses.
Display on purchase card items	Display the department allocation on purchase card expenses.
Mandatory on purchase card items	It is mandatory to select a department on purchase card expenses.

6. Click **Code Allocation**.



7. Define the following options:

Option	Description
Items should be assigned to department codes	Select this if your organisation allocates expenses spend to specific department codes. If selected, a claimant will be able to associate each of their Expense Items to a department code.
Claimants should be shown their department breakdown	This will allow a claimant to view the department allocation that their Expense Items are assigned to. By default, if this option is selected, the claimant will be able to alter the department allocation of the Expense Item. If the claimant should be restricted from altering the department allocation you will be required to edit their Access Role. Ensure that the Can edit department option is not active within the Access Role. **Note:** This option must be active in order to define the default department for an employee.
Claimants should be shown the department's description	This will display a friendly description which may help a claimant identify the correct department. The department description field will display instead of the department label. The description can be set within the department by navigating to Administrative Settings | Base Information | Departments.

Option	Description
Departments are shown in general details	This will display the department allocation within the General Details section of the Add/Edit Expense page. Selecting this option will restrict claimants from being able to split their department allocation using percentages.
Use default allocation if employee has none set	Select this option to hide the claimant's department allocation when adding an expense, but still assign their default code allocation to the expense.

8. Click **Save** to store the changes.

Configure an Employee's Cost Centre Breakdown

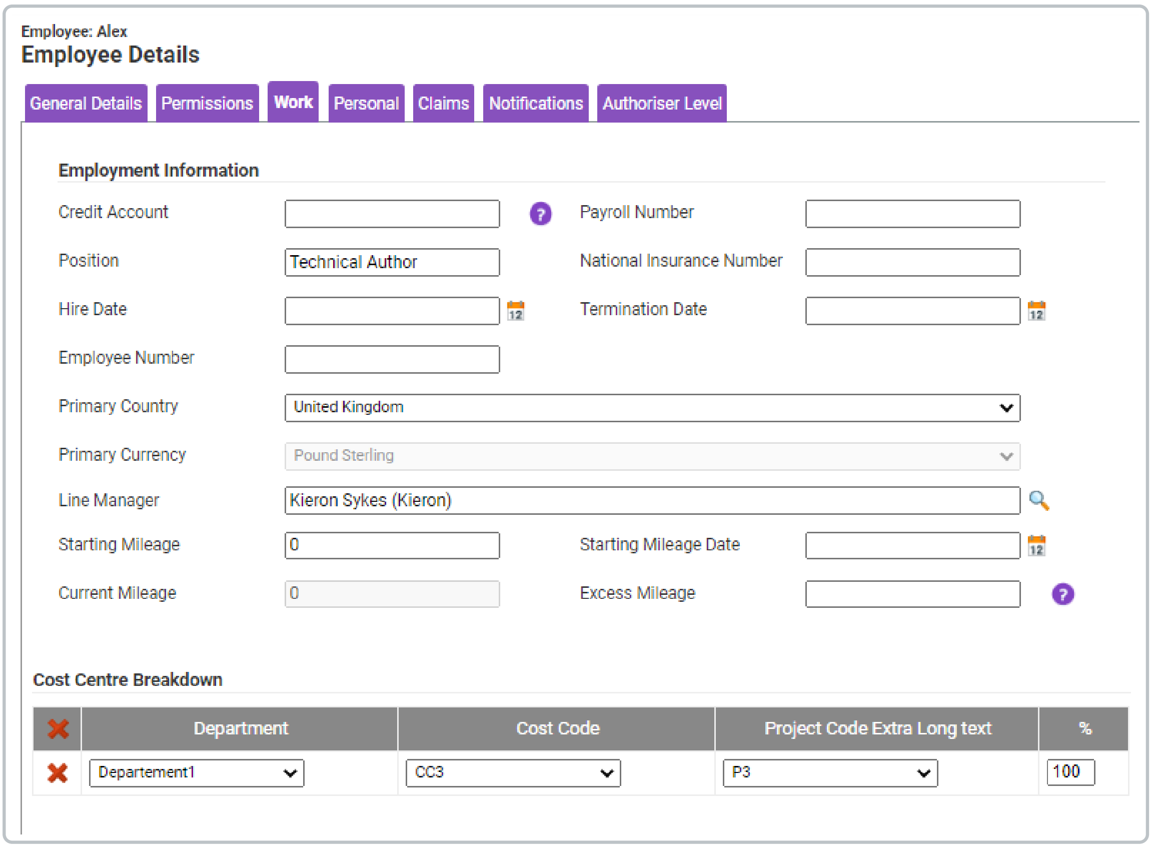
1. Navigate from the **Home** page to **Administrative Settings | User Management | Employees**.

2. Search for the appropriate employee and click .

3. Click **Work**, located under the Employee Details menu.

4. Locate the **Cost Centre Breakdown** section and then select the claimant's default department using the drop down list.

    - If the claimant is permitted to split expenses across multiple departments, set the % field to a number less than 100%. This will create a new row where you can select another department and then define the percentage split.



5. Click **Save** to store the changes against this employee.