Departments

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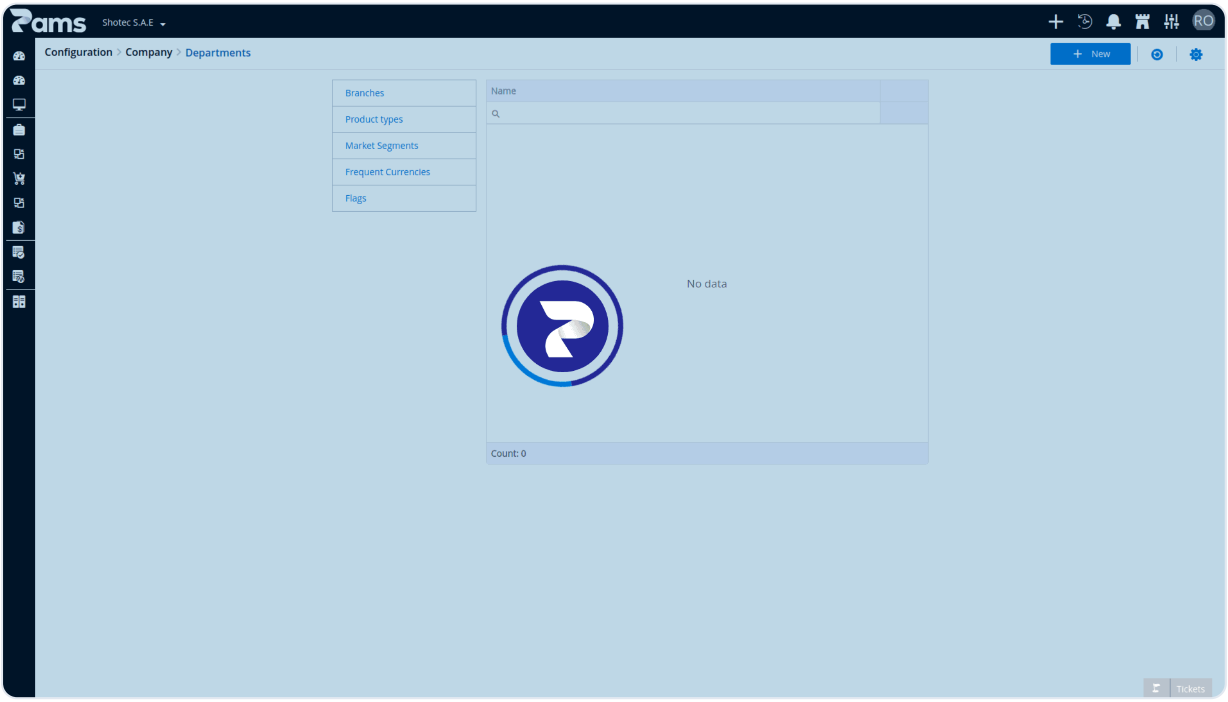
Departments

Applications › Configuration › Company



Departments

Overview

Use Departments to view and work with department records in the Company configuration area. This page is useful when you need to locate existing departments, narrow the displayed records, start a new department record, or export the current list. Sales, project, purchasing, warehouse, and finance users can use the list to review the departments available in the system.

> **Note:** The current list displays a count of 0, which means no department records are currently shown.

Workflow

1. **Review the department list before making a change.**
   Use **Search** to find a department in the current list. If you need to limit the records displayed, select **Apply filter** and apply the required criteria.

   > **Tip:** Filter the list before exporting it so that the export contains only the department records relevant to your task.

2. **Choose whether to create a department or work with the displayed records.**
   - To begin a new department record, select **New**.
   - To leave the current action without continuing, select **Cancel**.
   - To add or work with a file, select **Attach**, or drag the file to **Drop a file here**.
3. **Export the reviewed list when you need an external copy.**
   After searching or applying filters, select **Export** to export the department records currently displayed. Select **Ok** to confirm an available action when prompted.

Examples

A project manager needs to review the departments currently available before preparing project-related reporting.

1. On the Departments page, the project manager enters `Operations` in **Search** to look for matching department records.
2. If additional narrowing is required, the project manager selects **Apply filter**.
3. The project manager reviews the resulting list and selects **Export** to create a copy of the displayed department records for review outside the system.
4. If no suitable department is found, the project manager selects **New** to begin creating a department record.

Tips

> **Tip:** Use **Search** for a quick lookup and **Apply filter** when you need to narrow the list using additional criteria.

> **Note:** Use **Cancel** when you decide not to continue with the current action.

> **Warning:** Export only after confirming that the displayed list reflects the department records you intend to use.

Troubleshooting

Symptom	Likely cause	Fix
No department records are displayed.	No records match the current search or filter, or no department records are available in the list.	Review the text entered in **Search** and adjust the criteria applied through **Apply filter**.
The export does not contain the expected departments.	The list was searched or filtered before export.	Review the displayed records, update **Search** or **Apply filter** as required, then select **Export** again.
You started an action but do not want to continue.	The current action is no longer required.	Select **Cancel**.

Related pages

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