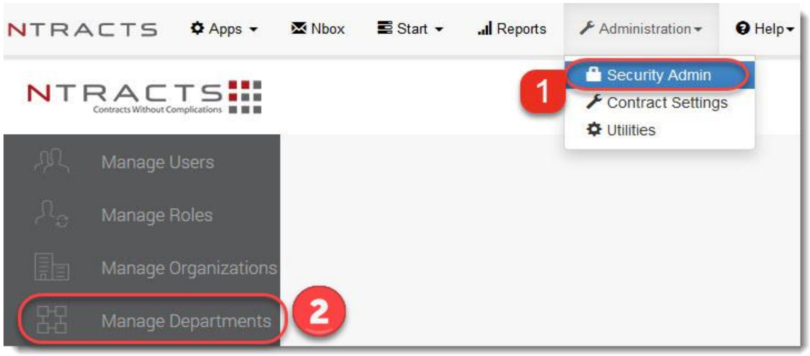
Quick Reference Guide

Administration>Security Admin>Manage Departments



Overview

This guide covers how to:

- Add a new department
- Edit a department's name
- Add a sub department
- View users that have contract access to a department
- Delete a department

Terms defined:
department- a division selected in Ntracts used for securing contract records

Note: *In Departments Management, a red plus sign signifies there are sub types available for viewing. Click on the plus sign to see the sub departments.*

To add a new department:

1. From the **Administration** menu, select **Security Admin**.
2. From the left menu, click **Manage Departments.**
3. Click the red **+ADD DEP** in the upper right.
4. Enter the desired name for the department.
5. In the **Nest Dept To**, select a department in the drop down only if you wish to create a parent-child relationship between two departments.
6. Click **Save**.

The next step is to add permissions for users and/or security roles to have access to the newly created department. Refer to the ***Manage Users*** or ***Manage Roles Quick Reference Guides*** for assistance.

To edit a department's name:

1. From the **Administration** menu, select **Security Admin**.
2. From the left menu, click **Manage Departments.**
3. From the Actions drop down, select **Edit Dept**.
4. Edit the **Edit Department** field.
5. Click **Save**.

To add a sub department:

1. From the **Administration** menu, select **Security Admin**.
2. From the left menu, click **Manage Departments**.
3. Search for the department you want to add a sub department to.
4. In the Actions drop down, select **Add Sub Dept**.
5. Enter the department name.
6. Click **Save**.

The next step is to add permissions for users and/or security roles to have access to the newly created sub department (*Exception: If the user and/or security role already has access to the parent department then access to the new sub department will be automatic*). Refer to the ***Manage Users*** or ***Manage Roles Quick Reference Guides*** for assistance.

To view users that have contract access to a department:

1. From the **Administration** menu, select **Security Admin**.
2. From the left menu, click **Manage Departments**.
3. Search for the desired department.
4. From the Actions drop down, select **View Users**. A Users pop-up appears listing the username, email address, full name and how the user received access to that department. You can search for a specific user in the upper left.

To delete a department:

Prior to deleting a department in Ntracts, any contract records assigned to that department would need to be assigned to another department. The system will not allow you to delete a department without doing so.

1. From the **Administration** menu, select **Security Admin**.
2. From the left menu, click **Manage Departments**.
3. Search for the department that needs to be deleted.
4. From the Actions drop down, select **Delete Dept**.
5. In the pop up, click **Confirm**.

