Departments

Departments

Purpose and when to use this record

Group employees and activity into an operating department for responsibility and reporting.

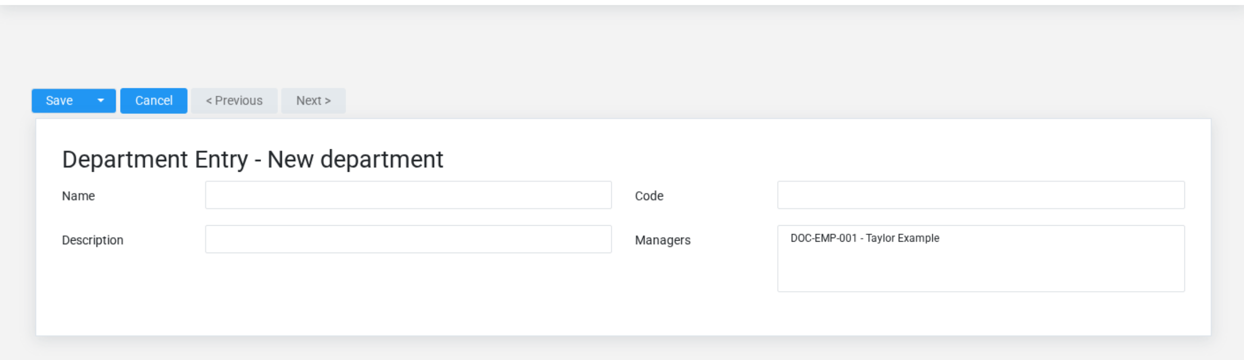
At a glance

- **Identify it by: Name**, and **Code**.
- **Why care:** These master records supply defaults and choices to later transactions. Correct duplicates and inactive records before staff build more activity on the wrong record.

Before you begin

You need the Brisk permission for the action you are taking on departments. If a Create, Edit, or Delete control is absent, do not work around it with another user's account; ask an administrator to review your role.

Create a department



The Departments create screen in the Brisk documentation demo.

Create a department after searching for the person, organization, item, location, or resource under alternate names and identifiers. Merge or correct an existing master record instead of creating a duplicate.

1. Select the business context first.
2. Enter the required identifying and operational values: **Name**.
3. Review **Code**, and **Description** against the source document or approved setup decision.
4. Save the department, then confirm **Name**, and **Code** on its detail page before continuing.

After saving: Verify this department in **Employees** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Delete a department

Delete this department only if it is an unused duplicate or setup mistake. Once other records refer to it, preserve that history and make the value inactive when the screen provides that option.

Before confirming, check for related **Employees**. Brisk may refuse deletion when another record depends on this one; resolve the duplicate or use the supported correction workflow instead of breaking the trail.

On the confirmation page, verify **Name**, and **Code**. After confirmation, return to the Departments list and make sure only the intended department was removed.

Review department details

Use the detail page as the shared record of what this department currently means. Verify **Name**, **Code**, and **Description** before relying on it for a decision.

Compare the department with its source document or approved setup request before deciding that it needs correction.

Next check: Verify this department in **Employees** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Edit an existing department

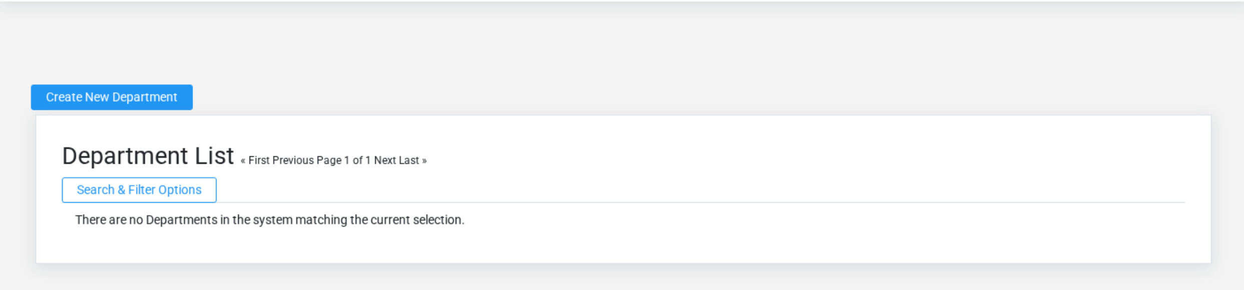
Edit this department to keep the same real-world party, item, location, or resource accurate. Do not repurpose it for a different entity after activity is attached.

1. Open the detail page. Compare **Name**, and **Code** with the supporting document or approved request.

2. Recheck the identifying information shown on the screen. These values are most likely to change future transactions, defaults, assignment, pricing, and reporting.
3. Save the change, return to the list, and confirm that the department now appears under the expected **Name**, and **Code**.

After the change: Verify this department in **Employees** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Find and review departments



The Departments list screen in the Brisk documentation demo.

Use the Departments list to find the correct record before opening or changing it. Compare **Name**, and **Code**. Compare the full identifier rather than relying on a similar name.

- The initial order emphasizes **Name**. Select a column heading when you need a different comparison.

Open the department whose **Name**, and **Code** match the task. If it is missing, clear the list filters and recheck the identifying information shown on the screen rather than creating a replacement immediately.

Fields and business rules

Brisk stores 3 user-relevant fields for this department, including 0 linked-record selections and 0 controlled-choice fields. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
Name	Yes	Human-readable name for this department.
Code	No	Short code used to identify this department.
Description	No	Description of this department.

What happens next

Verify this department in **Employees** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Name** and any message beside the field. A required related record may also be inactive or unavailable to your role.
- **The values look right but the result is wrong:** Compare this department with the source document or approved setup decision, then check the downstream screen where it is used.

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