Set up Departments

Setup paiyroll® · https://paiyroll.com/kb/set-up-departments/

Follow this article to set up multiple departments, which can be used for manager approval, cost allocation and reporting.

Create Department

You can add a few departments individually, but if you have many departments, it is quicker to use download/edit/upload.

Add departments in the UI

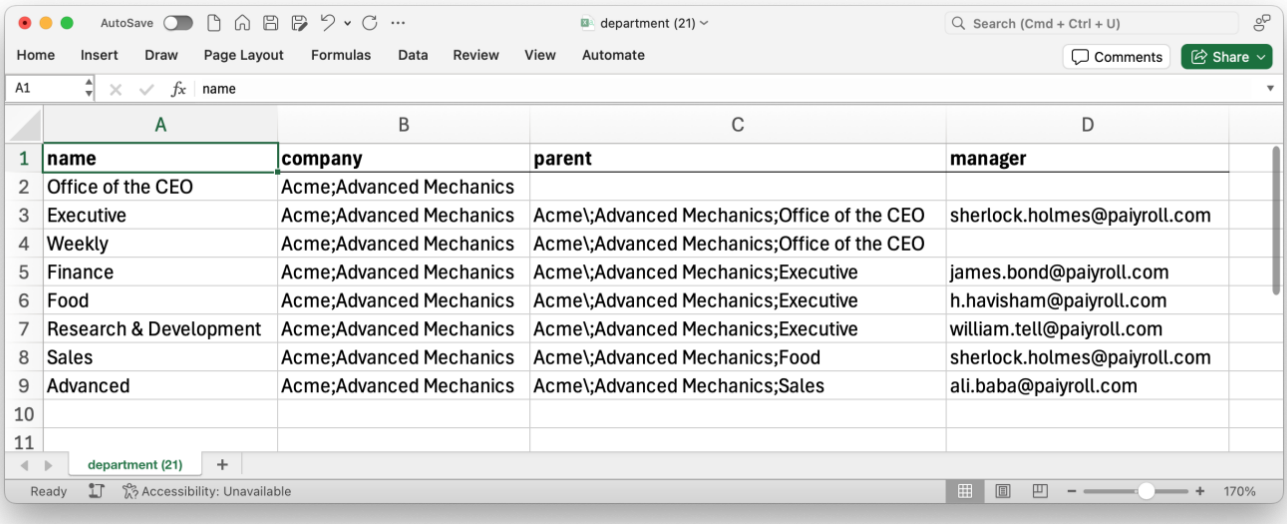
- Setup > Departments
- Add...
- Enter the **Name** you wish to use for the Department (all department names must be unique)
- Select the **Company**
- Select the parent department - which department does this new department sit under? An import will create an **Office of the CEO department**, which is typically the top-level department in a company.
- If you know the manager, select that employee now or leave it blank. If the employee has not been added, it can be added later.
- Add

Download/Upload

- Company Setup > Departments
- Download....
- Select the company
- Download

This will create a CSV file for the existing departments in your downloads folder. There is one row per department.

You can edit this file using a spreadsheet program to add additional new department rows. Ensure you use the same **company** values and **parent** values as applicable. You can save the file in CSV or XLSX format. Here is an example:



	A	B	C	D
1	**name**	**company**	**parent**	**manager**
2	Office of the CEO	Acme;Advanced Mechanics		
3	Executive	Acme;Advanced Mechanics	Acme\;Advanced Mechanics;Office of the CEO	sherlock.holmes@paiyroll.com
4	Weekly	Acme;Advanced Mechanics	Acme\;Advanced Mechanics;Office of the CEO	
5	Finance	Acme;Advanced Mechanics	Acme\;Advanced Mechanics;Executive	james.bond@paiyroll.com
6	Food	Acme;Advanced Mechanics	Acme\;Advanced Mechanics;Executive	h.havisham@paiyroll.com
7	Research & Development	Acme;Advanced Mechanics	Acme\;Advanced Mechanics;Executive	william.tell@paiyroll.com
8	Sales	Acme;Advanced Mechanics	Acme\;Advanced Mechanics;Food	sherlock.holmes@paiyroll.com
9	Advanced	Acme;Advanced Mechanics	Acme\;Advanced Mechanics;Sales	ali.baba@paiyroll.com
10				
11				

When you have finished editing the file, upload as follows:

- Setup > Departments
- Upload....
- Choose the file
- Upload File to server
- Skip first row and clickPreo-process selected data...
- Publish...

Your new departments have been uploaded. You can check the current departments in Company set up > Departments.

Move employees to their new department

You can move employees individually to different departments in the UI, or use bulk upload to make a large number of changes.

Edit a small number of employees

- **Employees**
- **Update** the employee

- Select the new department
- **Update** to save the change

Employee Bulk Edit

Download

- Employees
- Download...
- Select the company
- Download

Edit

This will create a file of all employee data in your downloads folder. You can edit this file and change the **department** column cells to the new Department names required. Save the file as a CSV or XLSX.

The only columns required for bulk editing upload are the **department** and **username**/**works_id**. Any other columns will be ignored. If you wish to provide department names from an external source, for example from an HR system, then ensure username/ workds_id are included in the file to look up each employee together with another column for department **names**. You can use any column headings.

Upload with Bulk Employee edit

- Toolshed
- Employee bulk edit > **Run**
- Select the **company**
- Choose the file
- Upload

Carefully choose each **setting** on the final screen:

1. **Fields**: Click **department** (you may need to scroll down or enlarge the field with the control in the lower right hand corner)
2. **Select**: VLOOKUP by **username** or **works_Id**
3. **Vlookup**: Select the column which includes the lookup (username or works_id)

4. **Mapping**: enter your column name in the curly brackets, for example, the following mapping will read new department names from a column heading in the file **my_new_department** into the employees **department**

```
{
"department": "{my_new_department}"
}
```

Leave **Dry run** to Yes to test the changes and click **Save options**. Go back and change this to No and click **Save options** to make the changes for real. The department change made will be listed.

You can verify the employees by updating an employee, or downloading all the employees again and checking them in a spreadsheet.

Manager Approval

The department manager is the employee who will be approving holidays, timesheets, absences etc.. If there is no department manager, any requests will be routed to the master admin. You can change the department manager in Company set up > departments. If you need an approver who is not an employee then you can set up a test employee.

Note: the manager of a department cannot be a member of the same department - they must be a member of a different department.

Reporting with Analytics

When you run **analytics** to create a data table, each employee will be included along with their department name. That means that any pivot table you create can also be use department names. This allows you to split and analyse any value in the payroll by department.