



## Departments User Guide

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### Staff Module

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## Introduction

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One of the key components of schedule creation and competency management is being able to group staff into new departments that you create or departments that already exist within your organization. With the Departments feature, those groups can be customized extensively to match your organization's setup and needs.

Not every department functions the same and may have different parameters for how certain schedule components are handled such as hours in the pay period or when overtime is counted. At an even higher level, you can also add, edit, and manage your organization's properties. This includes setting up different holidays, leave types, addresses, and more that can affect all departments and schedules.

Departments allows for this level of customization, resulting in more organized, efficient, and transparent schedules especially for admins. Decisions come easier as data is grouped and then accessed in an organized and familiar manner. Terminology and structure can mirror your organization's structure while also improving on previous manual scheduling processes.

Once you've mastered the creation and management of Departments and changing organization properties, you will be able to enact change at all levels of your company with ease and efficiency.

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## Creating New Departments

To begin setting up departments, first navigate to the **Departments** tab in the Staff module. (Figure 1)

Select the parent department you wish to add a sub-department to from the list. (Orange box, Figure 1)

Next select the **Add** button. (Yellow box, Figure 1)

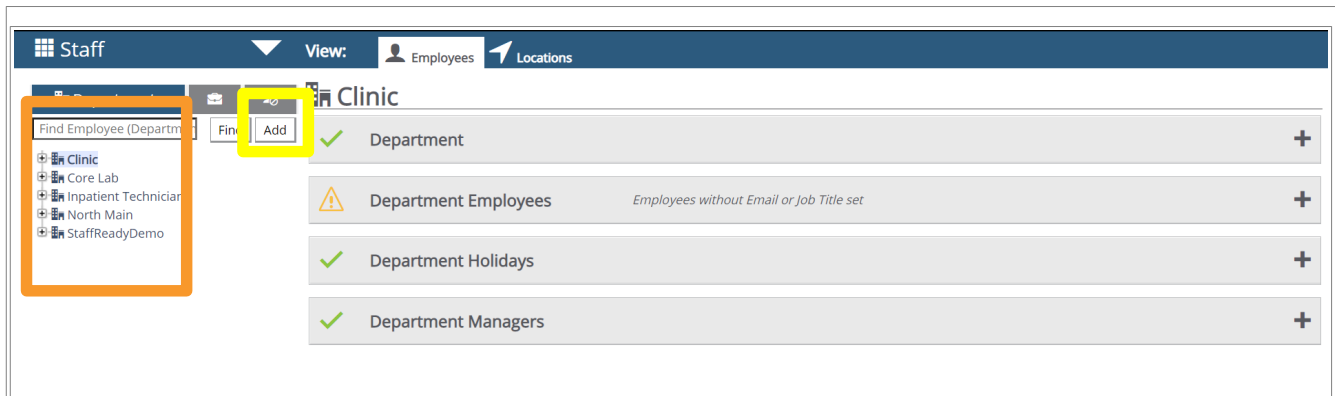


Figure 1

This will open the **Create Department** pop-up window. (Figure 2)

You must first choose where in the hierarchy this new department will reside. By default, the two options are the top level and the department you selected previously.

You will be required to enter the **Department ID** (required fields are marked with a red asterisk). We recommend that this be the same as the **Department Name**. You may also enter the **Department Name** and/or the name of the **Supervisor** but those are not required fields.

Select the **Save Changes** button to create the new department.

 A screenshot of the 'Create Department' pop-up window. The window has a title bar with 'Create Department' and a close button. The main content area contains the following fields:
 

- Within** (with an information icon): Two radio button options: '[top level]' (selected) and 'General Hospital'.
- Department Id\*** (with an information icon): A text input field with a red asterisk indicating it is required.
- Department Name** (with an information icon): A text input field.
- Supervisor** (with an information icon): A text input field.
- Save Changes**: A button at the bottom of the form.

Figure 2

## Editing and Moving Departments

To edit an existing department, first navigate to the **Departments** tab in the Staff module. Select the department you wish to edit and then select the **Edit** link in the **Department** color bar. (Yellow box, Figure 1)

You can choose to update the **department name** or **ID**, the **organization name**, or who the **supervisor** is. You can also choose to adjust the hierarchy of the department by selecting the link beneath 'Within'. (Yellow box, Figure 2)

This allows you to adjust how this department is organized within your departmental hierarchy. (Figure 3)

Click the **Select** button to move the department you're editing to that parent department or subheading.

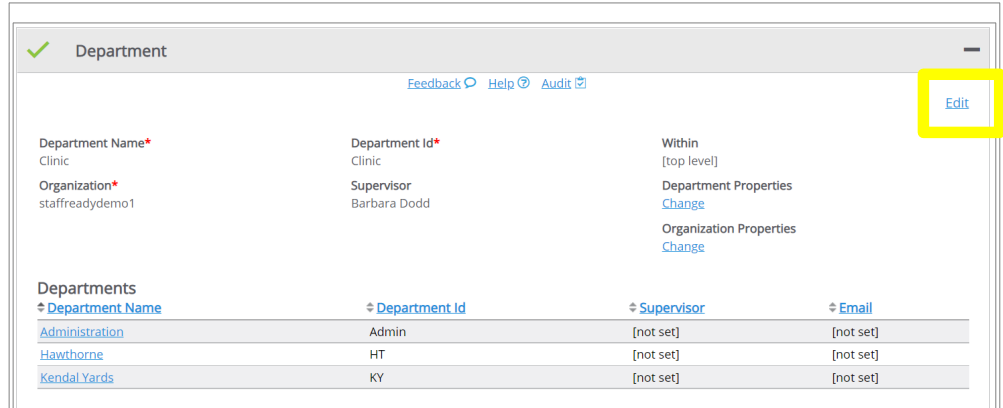


Figure 1

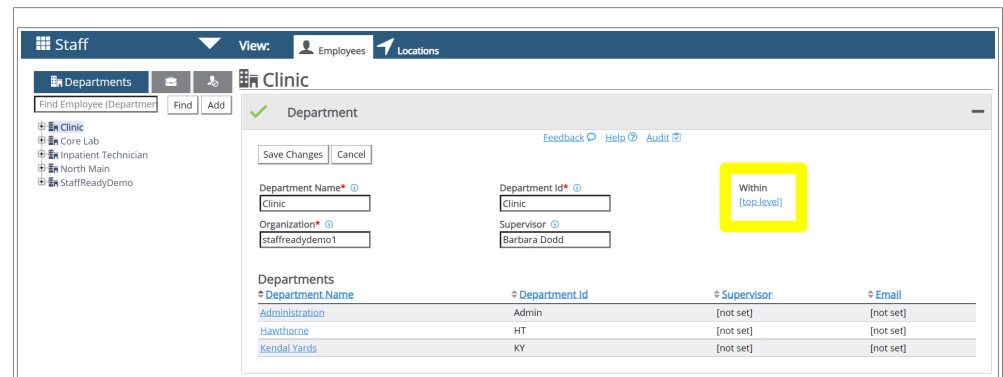


Figure 2

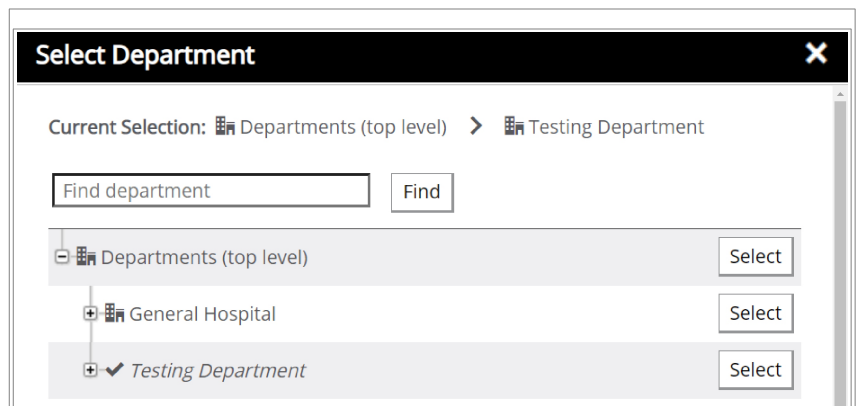


Figure 3

## Department Properties

You can also set up and edit **Departmental** and **Organizational** properties within the **Department** color bar. Open the color bar for the department you wish to edit properties for and select the **Change** link for **Department Properties**. (Figure 1)

This will open the **Department Properties** pop-up window. (Figure 2) You can choose from 3 different tabs: **Properties**, **Overtime**, and **Payroll**.

Selecting **Properties** and then selecting the **Edit** link will allow you to adjust the maximum number of consecutive days an employee can work between all the schedules they are a part of, after how many hours overtime begins accruing, the duration of the overtime period, the duration of the payroll period, and the maximum number of hours an employee can work between all schedules.

Select the **Save** button when finished.

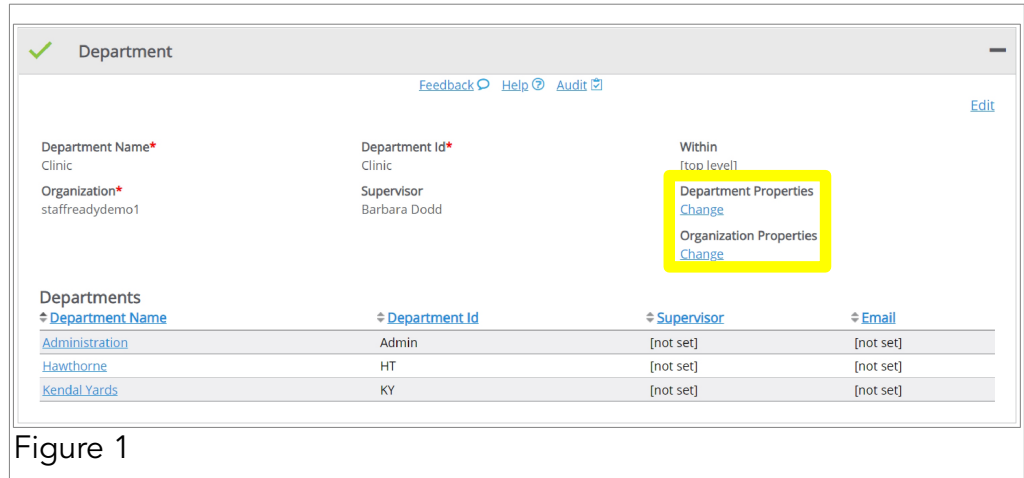


Figure 1

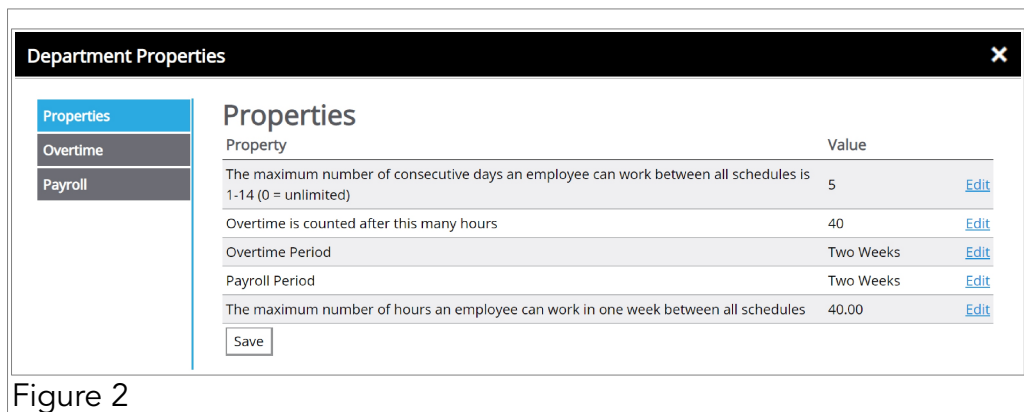


Figure 2

**Note:** Leave Types must be added manually to individual schedules. It will not be automatically added, only added to the options in the dropdown menu.

## Department Properties (Continued)

By selecting the **Overtime** side tab, you can view the list of overtime periods that have been set up for the given department. Each row lists the start and finish date of each period, along with the total number of weekdays within each. You can edit the pattern itself by selecting the **Edit** link. (Yellow box, Figure 1)

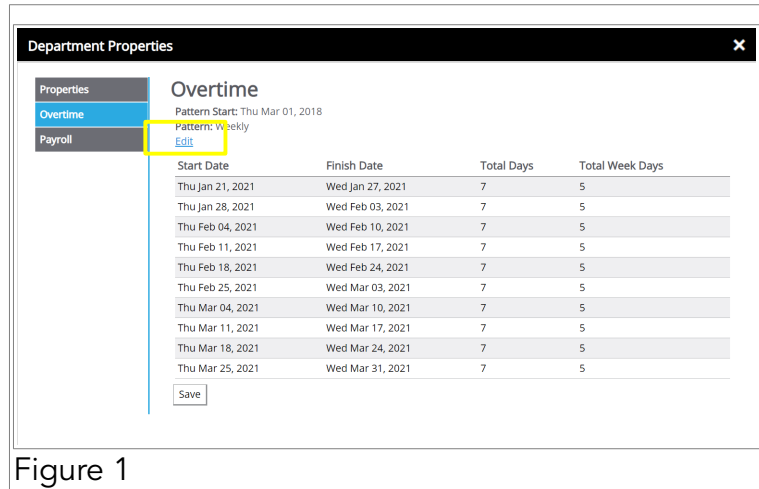


Figure 1

This will open the **Set Pattern** pop-up window. (Figure 2)

Once you have made your selections, select the **Save Changes** button.

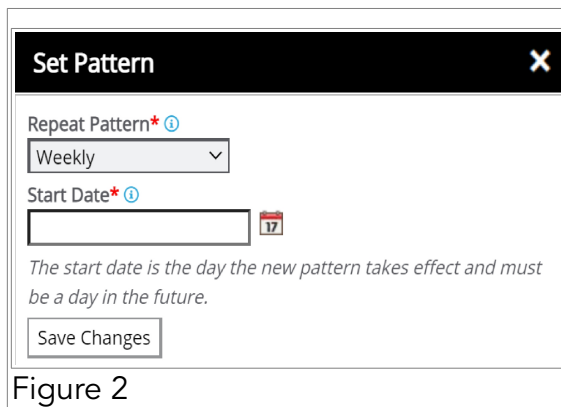


Figure 2

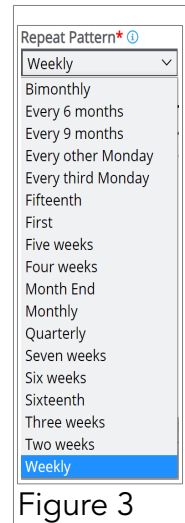


Figure 3

By selecting the **Payroll** side tab, you can view the list of payroll periods that have been set up for the given department. Each row lists the start and finish date of each period, along with the total number of days and the total number of weekdays within each. You can edit the pattern itself by selecting the **Edit** link. (Yellow box, Figure 4)

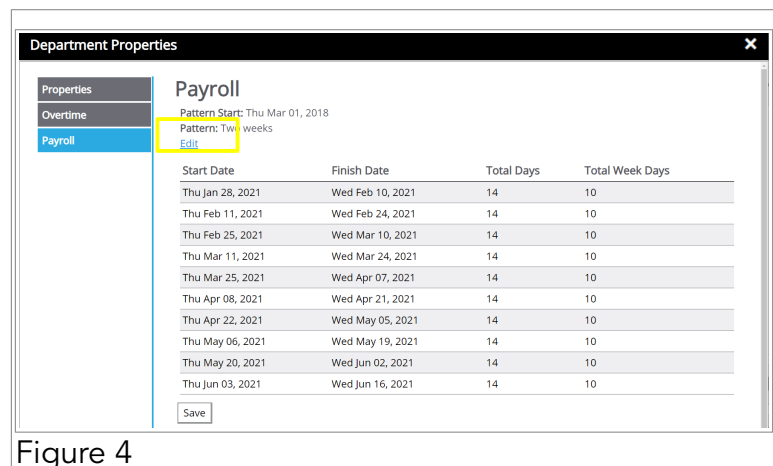


Figure 4

To change the pattern, select an option from the **Repeat Pattern** dropdown menu. (Figure 3)

Then, in the **Start Date** field, enter a calendar date on which the new pattern will begin. Select the **Save** button once you are finished.

## Organization Properties

Selecting the **Change Link** below **Organization Properties** in the **Department** color bar (Yellow box, **Figure 1**) will open the **Organization Properties** pop-up window.

From here you can adjust multiple property types including leave, holidays, phone types, addresses, overtime settings, and payroll.

You can also adjust basic properties such as the maximum number of consecutive days employees can work on all schedules, after which point overtime is counted, the default type of leave used when sick leave is created, how many days long the overtime period is, how many days are in the payroll period, and the maximum number of hours an employee can work in one week between all schedules. (**Figure 2**)

Additionally, you can elect to prevent core users (non-managers) from seeing full schedules (including other people's shifts), viewing the Reports Dashboard, seeing any leave, or leave requests besides their own, or from being able to create shift giveaway or trade requests. It should be noted that you must contact StaffReady support for these settings to be enabled.

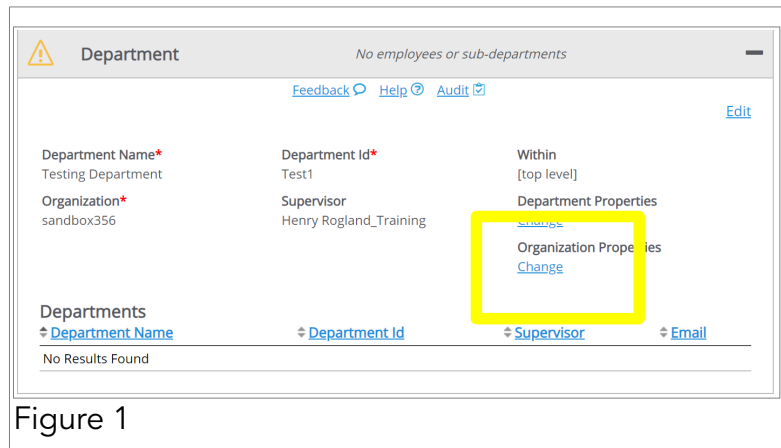


Figure 1

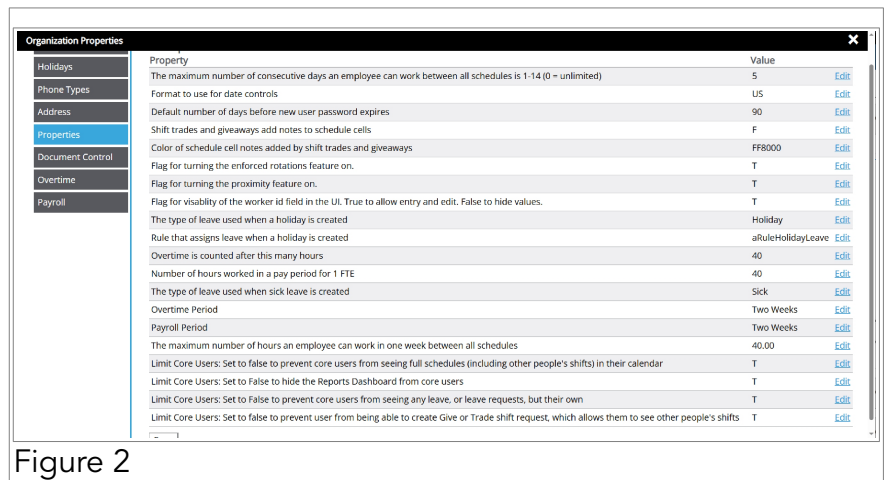


Figure 2

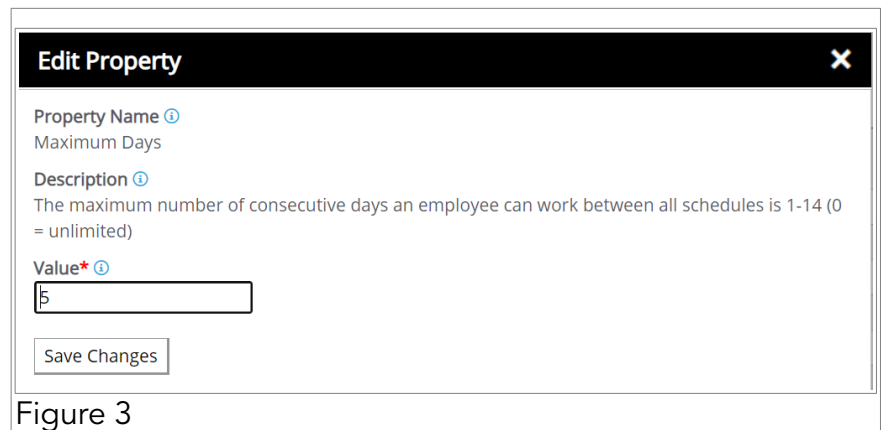
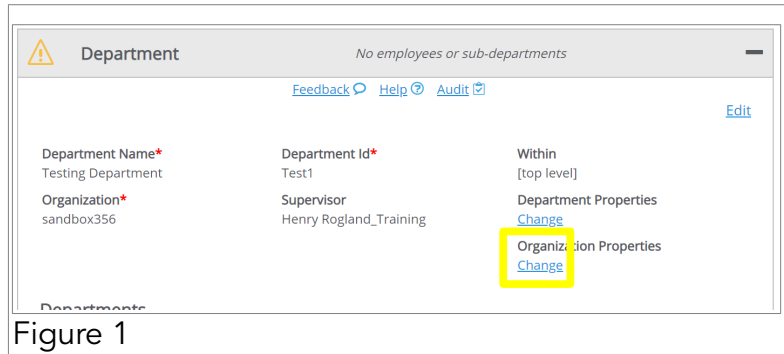


Figure 3

Selecting **Edit** on any of these properties will open the **Edit Property** pop-up window. (**Figure 3**). Update the value and then select the **Save Changes** button.

## Organization Leave

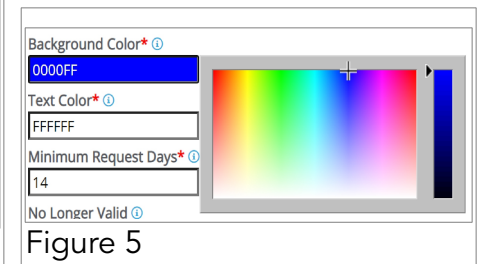
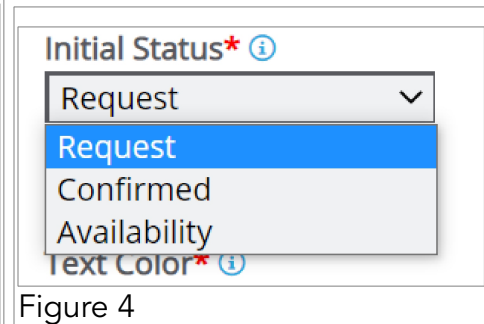
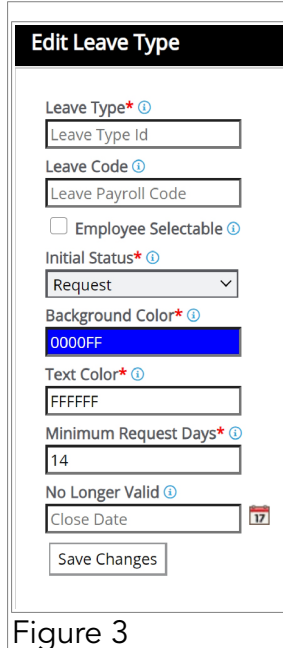
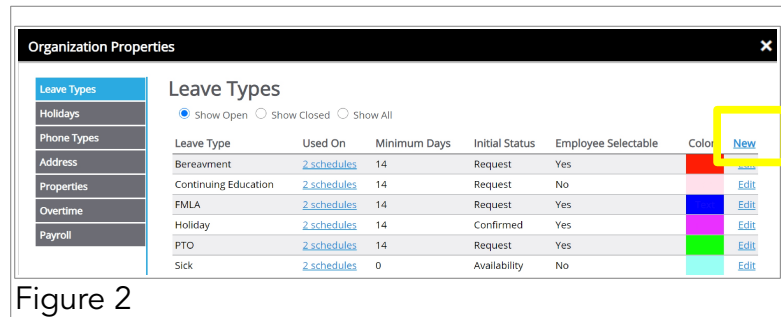
**Leave Types** can be used by any **Department** within your organization. To add a new **Leave Type** for your organization, first navigate to the department color bar and then select the **Change** link underneath **Organization Properties**. (Yellow box, Figure 1) This will open the **Organization Properties** pop-up window.



In the **Leave Types** side tab, select the **New** link. (Yellow box, Figure 2)

This will open the **Edit Leave Type** pop-up window. (Figure 3)

You can enter the **Leave Type ID**, **Leave Payroll Code** (if applicable), and select whether or not the leave type should be available to staff. You can also set the status that the request will begin as. The **Request** status means that the request will need approval, **Confirmed** means that the request will be automatically confirmed when it's submitted, and **Availability** means that the request is conditionally approved pending confirmation (Figure 4). You can also edit the color of the background for the leave request or text color (Figure 5), and the number of days from today that employees are prevented from making that request. It is not required but you can choose the date that the leave will no longer be used.



Once finished, select the **Save Changes** button.

## Organization Holidays

Selecting the **Holidays** side tab will allow you to edit or create a new holiday within your organization that can then be set up for each department. To create a new holiday, select the **New** link (Orange box, Figure 1). This will open the **Define Holiday** pop-up window. (Figure 2)

Enter the name of the holiday into the Holiday ID field and then determine what pattern the holiday will use.

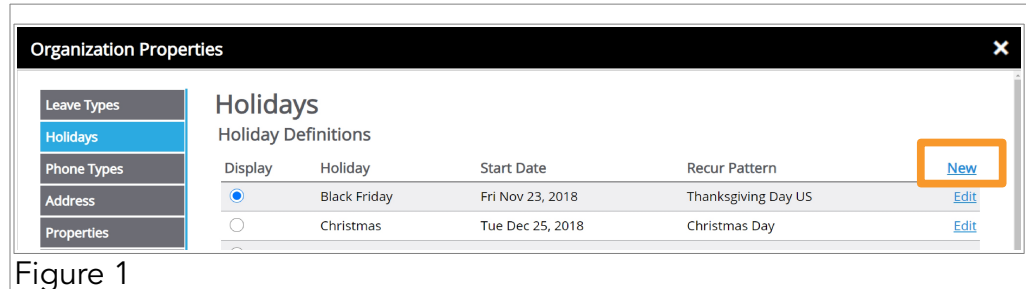


Figure 1

**Team Rotation:** You can also set up a team rotation to determine which employees will work that holiday going forward.

If you choose to enable Team rotation (Yellow box, Figure 2), you can select the first team and the last team (Figure 3) which will determine the range of teams that will work that holiday.

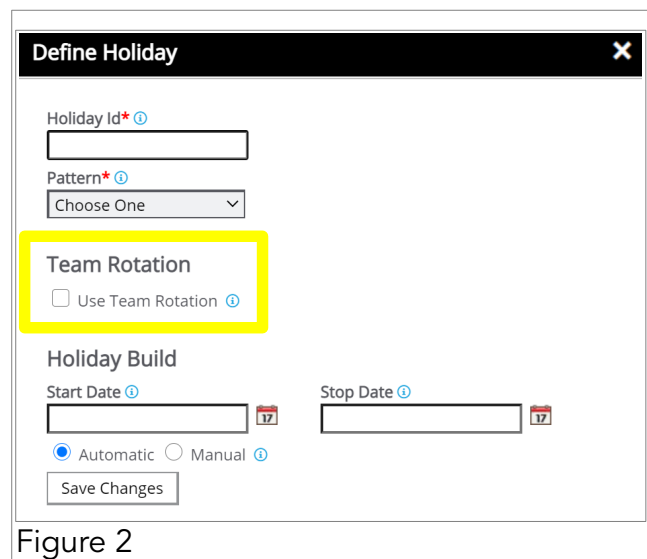


Figure 2

Enter the start date (Figure 4) for when the Organizational holiday begins as well as the stop date after which the holiday will no longer be created.

You will also need to set whether the holiday builds automatically or manually. The **Automatic** radio button will use the pattern previously chosen and the **Manual** radio button will let you create each holiday every year. (Yellow box, Figure 4)



Figure 3

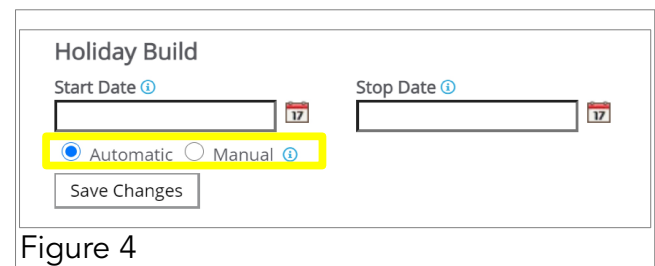


Figure 4

# Organization Phone Types and Address

It is common at many organizations for employees to have multiple phone numbers to be contacted at such as a home or mobile number. As before, any phone types created here can be utilized by any employee or department. To begin entering a new phone type, select the **Phone Types** side tab and then select the **New** link. (Yellow box, Figure 1)

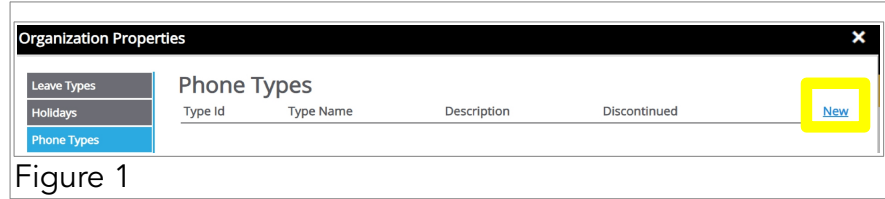


Figure 1

This will open the **Insert Phone Type** pop-up window. (Figure 2)

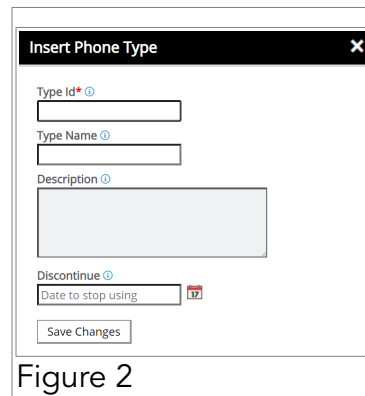


Figure 2

You can enter the short name for the type (ID), the full name (type name), a description, and a discontinue date if applicable.

Once you have made your entry, select the **Save Changes** button.

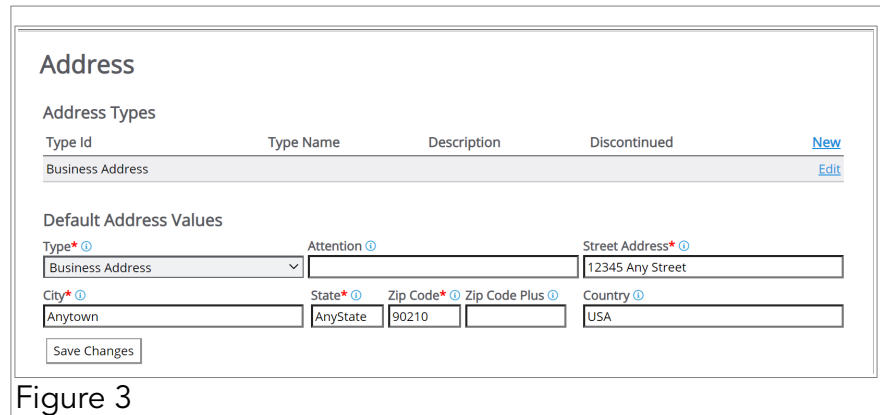


Figure 3

Selecting the **Address** side tab will allow you to adjust default address values and enter new or edit existing addresses. (Figure 3)

Select **Edit** next to the address type you wish to edit or new to create a new type. Selecting these links will open the **Insert Address Type** or **Edit Address Type** pop-up windows, respectively. (Figures 4 and 5)

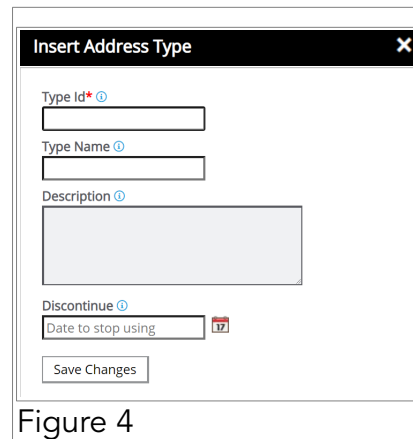


Figure 4

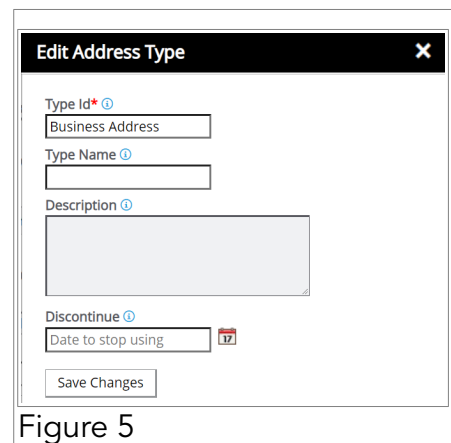


Figure 5

## Organization Overtime and Payroll

By selecting the **Overtime** side tab, you can view the list of overtime periods that have been set up for the entire organization. Each row lists the start and finish date of each period, along with the total number of weekdays within each. You can edit the pattern itself by selecting the **Edit** link. (Yellow box, Figure 1)

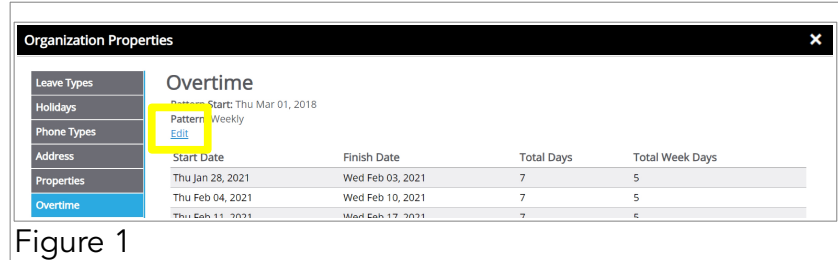


Figure 1

Start Date	Finish Date	Total Days	Total Week Days
Thu Jan 28, 2021	Wed Feb 03, 2021	7	5
Thu Feb 04, 2021	Wed Feb 10, 2021	7	5
Thu Feb 11, 2021	Wed Feb 17, 2021	7	5

This will open the **Set Pattern** pop-up window. (Figure 2)

To change the pattern, select an option from the **Repeat Pattern** dropdown menu. Then, in the **Start Date** field, enter a calendar date on which the new pattern will begin.

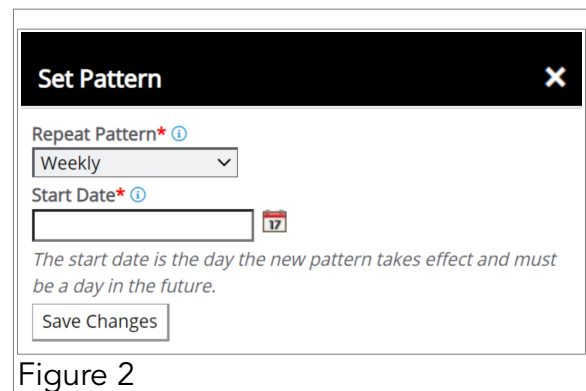


Figure 2

Once you have made your selections, select the **Save Changes** button.

Selecting **Payroll** (Figure 3) you can view the list of payroll periods that have been set up for the entire organization. Each row lists the start and finish date of each period, along with the total number of weekdays within each. This can be useful for admins or for HR purposes for your entire organization.

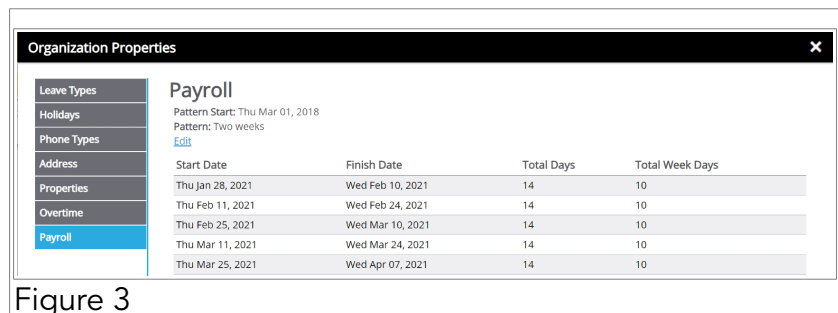


Figure 3

Start Date	Finish Date	Total Days	Total Week Days
Thu Jan 28, 2021	Wed Feb 10, 2021	14	10
Thu Feb 11, 2021	Wed Feb 24, 2021	14	10
Thu Feb 25, 2021	Wed Mar 10, 2021	14	10
Thu Mar 11, 2021	Wed Mar 24, 2021	14	10
Thu Mar 25, 2021	Wed Apr 07, 2021	14	10

Selecting **Edit** will again open the **Set Pattern** pop-up window. Select an option from the Repeat Pattern dropdown menu. Then, in the **Start Date** field, enter a calendar date on which the new pattern will begin. Select the **Save Changes** button once you are finished.

## Resources

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This concludes the User Guide for **Departments**. We hope that this guide has provided you with all the information you need and how the feature functions within the entire framework of the Staff module.

For more focused Guides on the functions and features discussed in this document, please check out the linked Guides on this page for supplemental reading.

For further assistance, please contact our Support Team directly.

Our service hours are Monday through Friday, 6am to 5pm PST.

Phone: 1-877-229-5230

[Online Support Form](#)

## Related Topics

Please select any link to skip to that topic.

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<b>Staff Color Bars</b>	<a href="#">PDF Document</a>