Fube

GUIDE

# How to organise your staff into departments



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Updated · 15 November 2026

# How to organise your workforce into departments

> Once your workforce grows beyond five people, the employee list stops answering questions. ‘How many hours has the warehouse done this month?’ or ‘who is affected by the shift change?’ are questions about areas, and the answer isn't in an alphabetical list. **Departments** are the label that turns that list into a usable organisation chart.

This guide is for whoever manages the team. In ten minutes you'll have your departments created, each person assigned to theirs and — most importantly — you'll know exactly what each field does afterwards, starting with the manager field, as the manager approves their people's requests. You can see the full scope of this part of the product on the **workplaces and departments** page.

## Before you start

A department in Fube is a **label that lives on the employee's record**: each person belongs to one, and only one. It isn't a hierarchy and it doesn't nest. It assigns only one thing: what its **manager** can approve, which you'll see in step 4.

It's also worth knowing in advance who can change it, because it isn't what you'd expect: **creating, editing and deleting departments uses the employees permission**, not a permission of its own. In practice, that leaves the screen in the hands of the **Owner** and the **HR Manager**, and nobody else. The **HR Auditor**, despite having read permission on employees, can't see it either: the **Team** section of the menu requires a time tracking permission that their role doesn't include, so the entire branch doesn't appear for them and a manually typed URL ends in *Access denied*. And the **Administrator** — who can do almost everything in other areas — can't see it either, because they have no HR module permissions. If someone tells you they can't find the screen, check their role first; how roles are assigned is covered in the guide to **inviting your team and assigning roles**.

## Step 1 — Open the departments screen

Go to **Team > Employees > Departments**. The screen is called **Department management** and, if you don't have any yet, it greets you with a notice — *No departments* — and a button to create the first one.

Once you have some, the list shows four columns: **Name** (with its coloured dot in front), **Description**, **Manager** and **Status**. There's a fifth, **ID**, hidden by default and available in the columns menu should you ever need it. Departments are sorted alphabetically and you can filter by text in the name and description, by a specific manager and by status.

## Step 2 — Create the department

Click **Create department**. The form has five fields and only one is required:

| Field | What it's for | Required? |
|---|---|---|
| **Name** | What the area is called. Maximum 100 characters | Yes |
| **Description** | Free text to define its scope | No |
| **Colour** | The coloured dot in the list | No |
| **Manager** | The employee who runs it and approves their people's requests (step 4) | No |
| **Active** | Toggle, on by default | No |

Click **Save** and Fube confirms with *Department created*.

**The name can't be repeated within the same company.** If you try, the screen responds *A department with this name already exists*. That's why it's worth deciding on a convention before creating the third one: either all ‘Warehouse’, ‘Office’, ‘Workshop’, or all ‘Sales department’, ‘Purchasing department’. Mixing the two styles costs you in every filter you use afterwards.

About the **colour**, a clarification so you don't give it more importance than it has: it's shown as a dot next to the name **on this screen and nowhere else**. It doesn't colour calendars, shift rotas or reports. Choose it to recognise the row at a glance and don't spend any more time on it.

## Step 3 — Assign each person to their

## department

Departments aren't filled from here: **the assignment lives on the employee's record**. Go to **Team > Employees > Employees**, open the person and use the **Department** field, with its selector. If you're adding someone new, it's one of the fields on the new employee form and it's explained in the guide to **adding an employee**.

Each employee belongs to **a single department**. If someone works across two areas, you'll have to choose which one counts for reporting purposes: Fube doesn't allow dual membership.

There's also a timing detail worth knowing, because it can't be undone: when you create an employee's record, Fube notifies their colleagues with a *New team member* notice, and **that notice is limited to the department the record has at the moment it's created**. If you leave it empty and fill it in tomorrow, the notice will already have gone out to the whole company. It's not serious, but if you wanted only the team to find out, set the department before saving.

# Step 4 — Appoint a manager: they approve their people's requests

The **Manager** field accepts any employee in the company — they don't need to belong to the department — and it's the one that changes day-to-day work the most, because **the manager approves their people's requests without needing an HR role.** Simply appoint them here: there's no need to give them any separate permission.

With the people in their department, the manager can:

- **Approve or reject their absence requests**, leaving the reason for rejection if they wish.
- **Validate or reject their daily hours balances**, one by one or all at once.
- **See what they've done today**: the clock-in time of whoever is clocked in, the day's timeline and the time worked. They still see the rest of the workforce like any other colleague, with their name and their status.

They have all this in **Team > Team** — the *My team* screen — in a **Pending approval** card that brings together their people's pending absences and balances. When rejecting a balance they can leave the reason, and the notice the person receives carries their name as the department manager, not HR's. And when someone in their department requests an absence, they get the *New absence request* notice, which takes them straight there. The full absence workflow is in the guide to **managing team holidays and absences**.

For this to work, three things are needed: the department must be **Active**, the manager must be an active employee with their own Fube user — it's the one they log in with to approve — and there must be someone else in the department besides them. 'Their people' are whoever has that department on their record **today**: if you move someone to another department or change the manager, the inbox changes at that moment. And if one person manages two departments, they see both.

What does **not** change, which is worth being equally clear about:

- **They don't approve their own requests.** Their own absences and their own balances are still handled by HR, even if they're in the department they manage.
- **Only their people.** Other departments' requests don't appear for them and they can't resolve them.
- **It gives them nothing else.** They can't cancel or edit absences, they can't correct clock-ins and they can't see the absence calendar or the HR screens.
- **HR can still do everything.** The Owner and the HR Manager approve and validate anyone's requests, including those in a department with a manager, and whoever gets there first resolves it. If the manager also has one of those roles, they don't see the *Pending approval* card: they approve from the HR screens, as usual.

The **Manager** column in the list can be filtered, so it also answers 'who is each area's manager?' at a glance without opening an organisation chart elsewhere.

## Step 5 — Make the most of them

With departments set up and the workforce assigned, this is what really changes:

**In the time tracking reports.** Go to **Team > Hours and balances > Reports** and you will see a **Department** selector next to the employee, workplace and schedule ones. It filters the four hours tabs (*By employee*, *Overtime*, *Additional hours* and *Daily totals*) and the download too: the file you download as CSV or Excel has the suffix `-depto` in its name, so you won't mix up the warehouse report with the company-wide one three weeks later. The fifth tab, *Compliance*, works independently and is not filtered. How to read these reports is explained in the guide to **hours worked reports**.

**In the employee list.** The **Department** column can be filtered and also **grouped**: in the column header you have **Group**, and the list then shows your staff split by area. It is the quickest way to spot anyone who has been left unassigned.

**In internal announcements, partly.** When you publish an announcement, the **Recipients** field offers **Company**, **Department** and **Workplace**, but at the moment the form **has no way to choose which department**: even if you tick *Department*, the announcement still goes out to all staff. It is a known product gap, so until it is closed, assume every announcement reaches everyone. You will find the details in the guide on **communicating with your staff**.

## A warning that saves headaches: the department is not historical

This does not appear on any screen and explains 90% of the surprises when comparing reports from two different months.

**The department is a current attribute of the employee record, not a snapshot of the past.** Clock-ins do not store which department the person belonged to on the day they clocked in: they store who clocked in, and the report works out the department **at the moment you view it**.

The practical consequence: if you move someone from Warehouse to Office on 1 September, the July report you run tomorrow will count their July hours **under Office**. It is not a calculation error (the hours are the same), but the breakdown by area changes retroactively. If you need to keep the breakdown for a closed period, **download the report before moving anyone**.

## Edge cases and common mistakes

- **I deleted a department with people in it and it didn't warn me.** That is the expected behaviour: deletion is not blocked. The employees **are not deleted and lose nothing**; they are simply left **without a department**, and from then on they disappear from any filter by area until you assign them another one. Check the employee list grouped by department after a deletion.
- **I marked a department as Inactive and it still appears when assigning employees.** That is also expected, even if it does not seem so: **Active / Inactive does not prevent it from being assigned** (it is a badge in the list and a filter). The only thing that changes concerns the manager: the manager of an inactive department stops approving their team's requests and receiving their notifications, which go back to HR only. If you really want nobody to choose it by mistake, delete it.
- **Two departments with the same name.** This is not possible, and deliberately so. If you need to tell apart 'Sales' at two branches, either put it in the name ('Sales North', 'Sales South') or what you are really looking for is **workplaces**, which are something else and coexist with departments.
- **I can't find the screen.** It is almost always the role. An **Administrator** does not have HR module permissions and cannot see it; neither can an **Employee**.
- **The manager doesn't see the 'Awaiting approval' card.** Check, in this order: that the department is active, that the manager has a user account and it is active, and that there is someone other than them in the department. If they have an HR role (Owner or HR Manager), the card is deliberately hidden: they approve from **Team > Time tracking > Absences** and from the hours balance.
- **Someone without a department requests holiday.** Their request has no manager to approve it: it goes to HR only.
- **Someone appears in the reports under an area that is not theirs.** Check their employee record: the report uses the current department, not the one they had on the dates queried.

# Frequently asked questions

## Can an employee belong to several departments?

No. The employee record allows only one department per person. If their work is split between two areas, choose the one you want to count in the reports.

## What happens if I delete a department?

It is simply deleted, whether or not it has people in it, and this cannot be undone. Employees who had it assigned are left without a department; their clock-ins, balances and documents are not affected.

## So what is the point of marking it as inactive?

Two things: the *Inactive* badge in the list, with its status filter, and cutting off the manager's role, so they stop approving their team's absences and balances. It does not prevent it from being assigned or hide it in the selectors.

## Can I filter holidays or shifts by department?

Not yet. The department filter is available in the time tracking reports and in the employee list; absences and shift rotas are filtered by person.

## Does the department manager approve their team's hours or absences?

Yes. They approve or reject absences and validate or reject the daily balances of the people in their department, from the **Awaiting approval** card in *My team*, without needing an HR role. Their own requests are still approved by HR.

## Who approves the manager's own holidays?

HR, as with anyone who has no manager. Even if the manager is in the department they lead, their own requests and balances do not appear in their inbox.

### Can I create departments from the AI Agent?

Yes. The agent includes tools to search for departments by name or description and to create a new one with its name, colour and manager, so you can set up the structure by asking for it in natural language and review it afterwards on screen.

## Half an hour that pays for itself

Setting up departments is one of the few configuration tasks whose benefit shows up the same month: the first report filtered by area already saves you the spreadsheet you used before. Do it with the staff you have today, assign everyone (including office staff, who are the ones always left without a label) and leave the detailed organisation chart for when it is needed. If you don't use Fube yet, you can **create your free account** and have your team organised from day one.

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