

Departments

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Departments

Departments at a glance

Departments is the company reference list for maintaining department entries in the HR configuration

area. The page title is **Departments**, and a new or edited entry opens in a

Department popup

under **HR**.

If you need to...	Go to
Prepare access and recognise the available surface	Before you start
Open the list	Find Departments
Check fields and list behaviour	Understand the Departments screen
Add or rename an entry	Add or change a department
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Before you start

Prerequisites

- Have access to the Departments configuration route.
- Confirm that the configured subscription feature is included for the company.
- Have the department name ready before opening the entry form.

- Expect the available list headers to depend on the page configuration when the list opens.

The list surface loads when the configured feature is included. When it is not included, the list is replaced by an upgrade surface. The **New** control is available when the new-entry control is not hidden. The edit control and delete menu depend on the corresponding access settings.

Find Departments

From the configuration area, open **Departments**.



Prerequisites

- Have access to the configuration area.

Steps

1. From the configuration area, select **Departments**.

Result: The Departments configuration route opens when the configured feature is available.

Understand the Departments screen

The Departments screen maintains the department name while keeping record and ordering values behind the form. Use the visible field for the value you want to change.

Field	What to expect	Required	Where it appears
Name	The department name	Yes	List and entry form
Ordering value	The list order value	No	Hidden
Entry identifier	Identifies the entry	No	Hidden
Company-branch reference	Identifies the company branch	No	Hidden
Description	Not shown in the entry form	No	Hidden

The form exposes **Name** as the visible editable field. The columns shown in the list can vary, so read each entry using the headers currently shown. A new entry opens in the **Department** popup.

Add or change a department

A department entry is a named reference value that you maintain from the Departments list.

Add or edit an entry

Prerequisites

- Know the department name to enter.
- Have the Departments list open.

Steps

1. Choose the action for the entry you need.

If you need to...	Select
Create a new entry	New
Change an existing entry	The row edit control

A new entry opens a **Department** popup. An existing row opens the same popup for editing.

2. In the popup, enter the department name in **Name**.
3. Select **Save**.

Entry type	Message
New entry	Data saved Successfully
Edited entry	Data updated Successfully

Result: The list reloads after a successful save, and the popup closes.

Remove or export departments

Use the row delete menu to remove an entry and the list **Export** control to open export choices.

Delete an entry or open export

Prerequisites

- Have the Departments list open.
- For deletion, have more than one entry in the list.

Steps

1. Choose the list action you need.

If you need to...	Select
Remove an entry	The row delete control
Open export choices	Export

2. If you opened the row delete menu, choose one option.

If you want to...	Select
Keep the entry	Cancel
Continue deletion	Delete

Confirm deletion when the prompt displays `Are you sure you want to delete this item?` .

3. If you selected **Delete**, wait for the result.

Result: A successful deletion displays `Data Deleted Successfully` . Selecting **Export** opens the export-options dialog; selecting **Cancel** leaves the entry in the list.

Handle surface variations

The Departments surface can differ according to subscription and access settings.

Prerequisites

- Have the configuration area open.

Steps

1. Choose the applicable surface branch.

If you see...	Then...
The list	Use the available list actions.
An upgrade surface instead of the list	Use the upgrade route available to your company.
No New control	Use an available maintenance route or contact an administrator.
No row edit control	Review your access before attempting an edit.
No row delete menu	Review your access before attempting a deletion.
Different list headers	Read entries using the headers currently shown.

Result: You use the Departments surface and controls available for the current configuration.

When a department action goes wrong

Use the message text to choose the corrective action.

What you see	Meaning	What to do
No message is emitted when validation is invalid; the save returns.	The save returns without displaying a validation message.	Check the required Name field, then select Save again.
Related to Saved data, Can't be deleted	Saved data is related to the entry.	Keep the entry and review the saved relationships before trying again.
Must have at least one item	The list cannot be reduced to zero entries.	Keep at least one department entry.
Failed to Delete	The deletion did not complete.	Review access and saved relationships, then try again.
Forbidden characters detected. Please remove them and try again.	The filter contains characters the list rejects.	Remove the forbidden characters from the filter and apply it again.

Continue after department maintenance

When the list has reloaded and the popup has closed after a successful save, continue with the next configuration list from the [Configuration dashboard](#), or review related reference-list work in [Reference-list data](#).