

Simply Personnel Personnel Manager

A Guide to Setting up your Hierarchy

Simply Personnel: Setting up Hierarchy

This document provides step-by-step guide for users to give an easy understanding to set up you company hierarchy.

If at any time you need help or just need some questions answered please use our on-line helpdesk at www.simplypersonnel.co.uk where you will find comprehensive articles and an option to open a support ticket.

Thank you

The Simply Personnel Team.

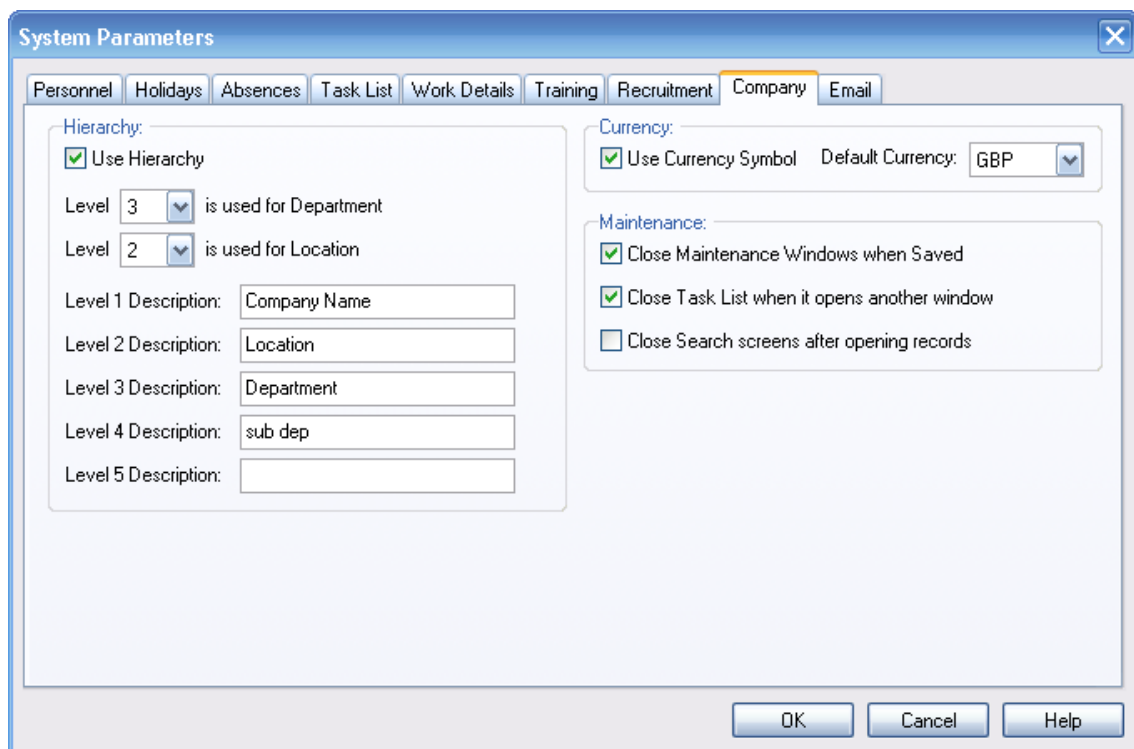
Getting Started:

To ensure that the hierarchy is set up and works properly you need to make an adjustment to your system set up.

Firstly go to you system set up on your main dashboard, then select system parameters.



Then select the tab labelled **company** and tick the box that states use hierarchy.



System Parameters

Personnel Holidays Absences Task List Work Details Training Recruitment **Company** Email

Hierarchy:

Use Hierarchy

Level 3 is used for Department

Level 2 is used for Location

Level 1 Description: Company Name

Level 2 Description: Location

Level 3 Description: Department

Level 4 Description: sub dep

Level 5 Description:

Currency:

Use Currency Symbol Default Currency: GBP

Maintenance:

Close Maintenance Windows when Saved

Close Task List when it opens another window

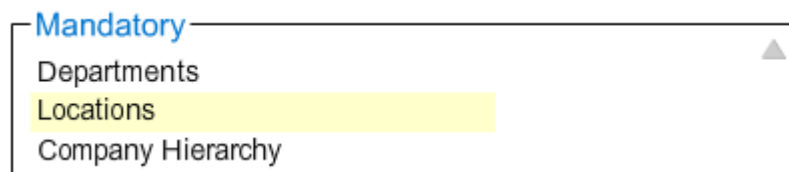
Close Search screens after opening records

OK Cancel Help

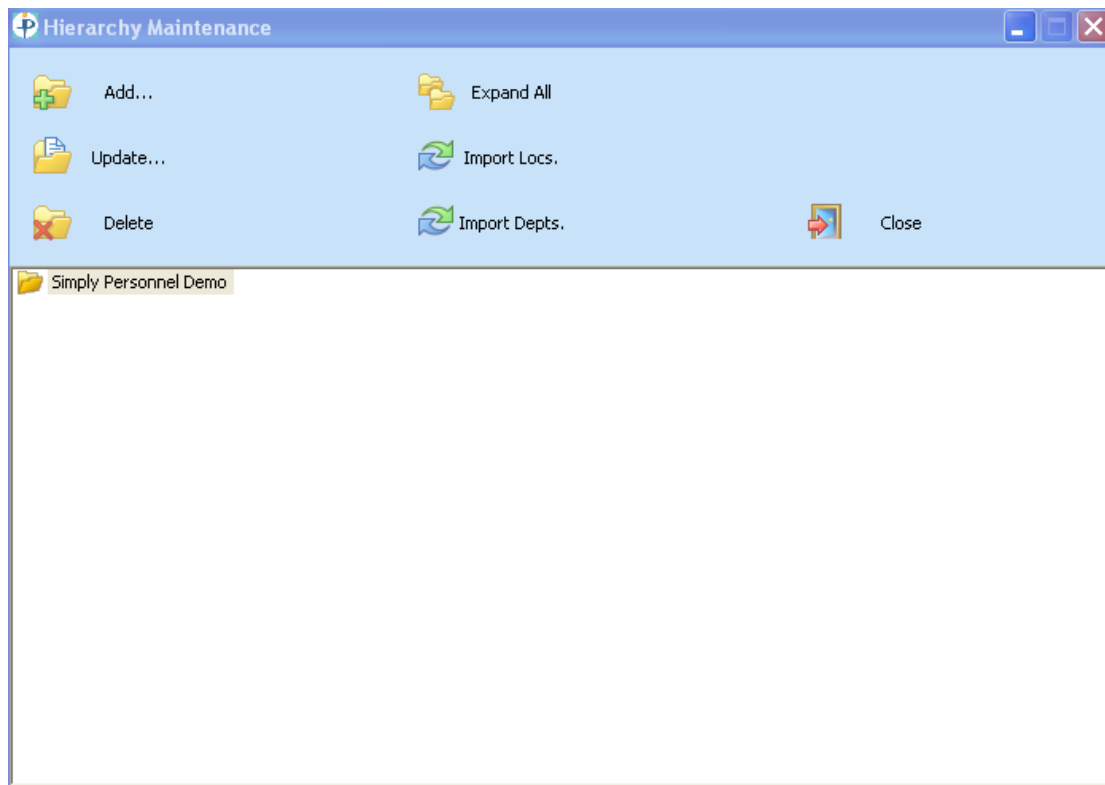
Enter the different level descriptions, this will be used when you are setting up your hierarchy.

Setting Up your Hierarchy:

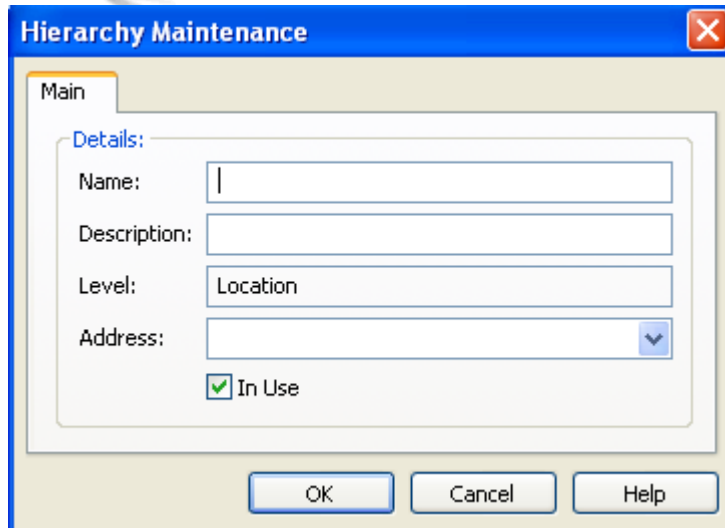
To set up your hierarchy go to the system **setup>business rules>mandatory>company hierarchy.**



The following window will open:



Your first folder will be you company then you can either import you existing location or add the next level of folder, if you select the **ADD** button this window will appear.



Hierarchy Maintenance

Main

Details:

Name:

Description:

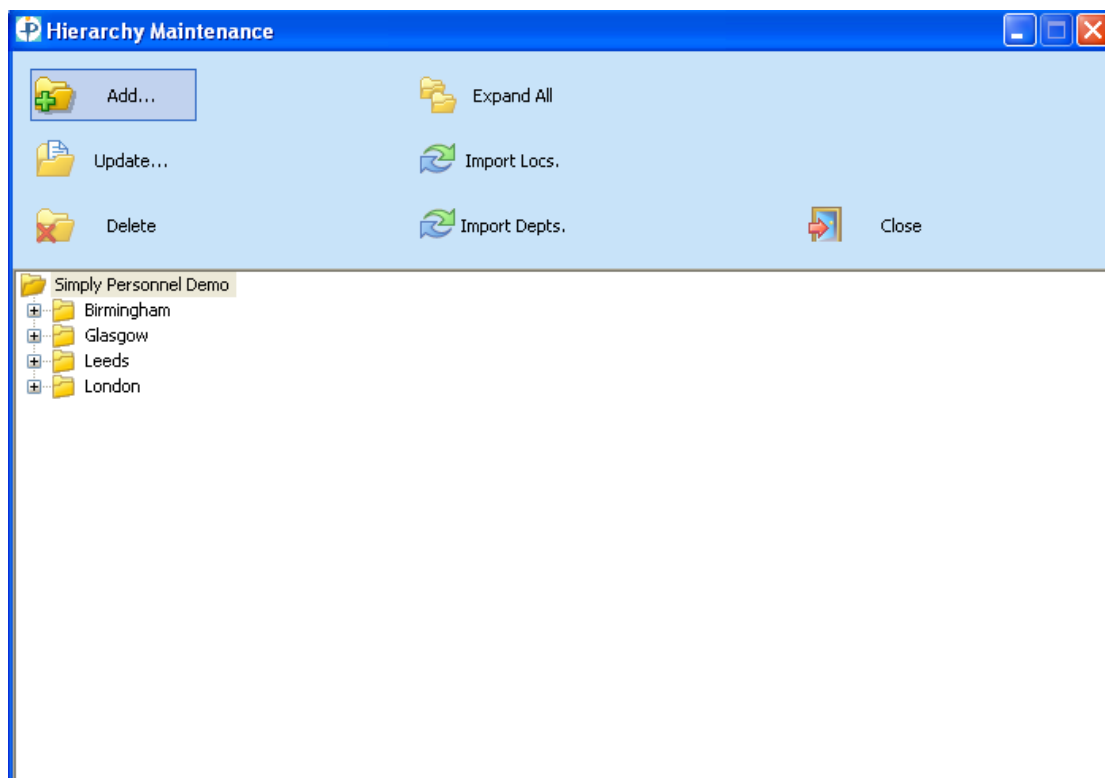
Level:

Address:

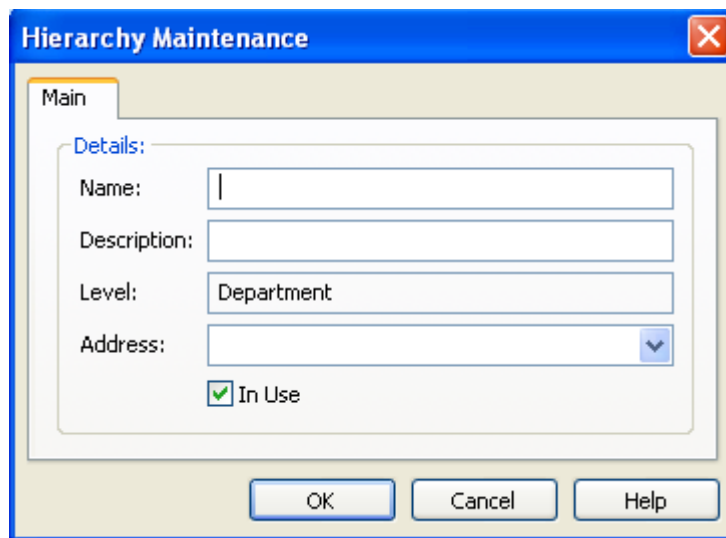
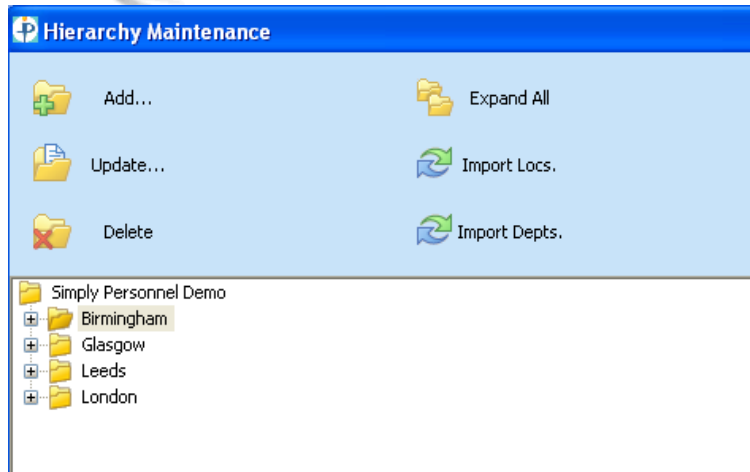
In Use

This will be your second level of hierarchy in the above case it is location, enter the name and description.

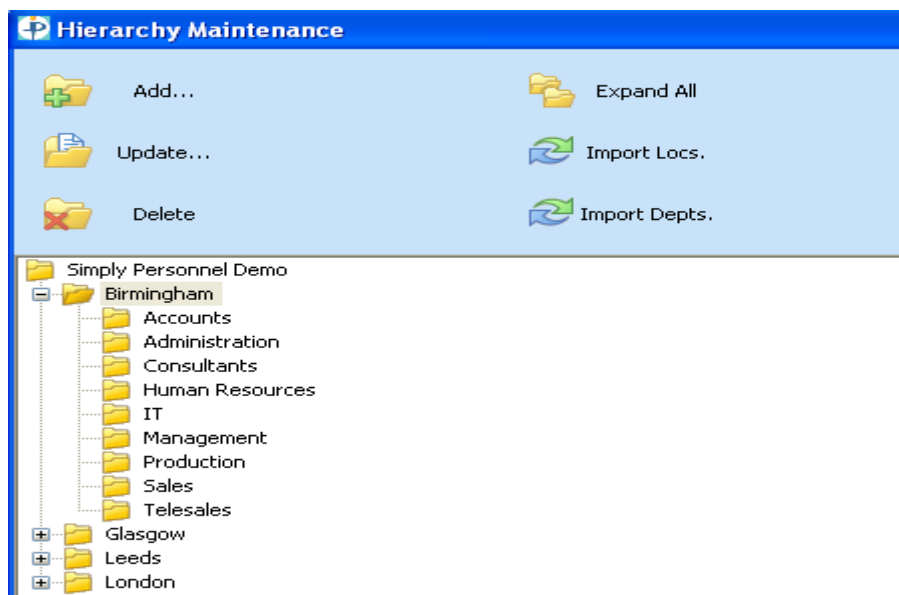
Once the second level has been completed your window will look like this:



Then proceed to add your third level of hierarchy by selecting your location in (this case Birmingham) then add your existing department or select ADD



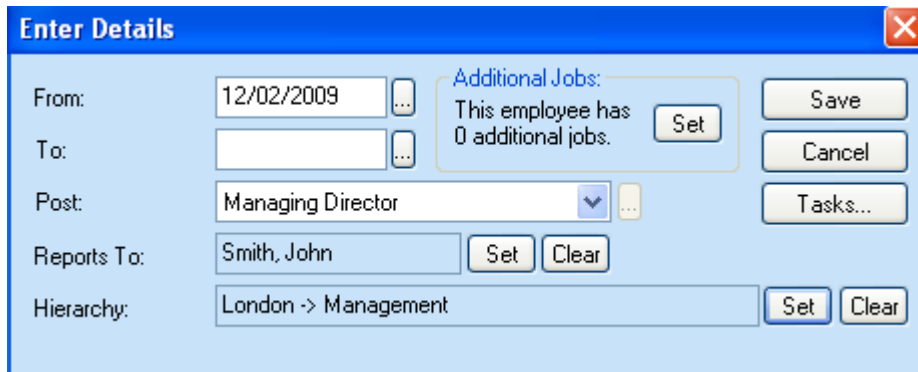
Enter your department and once complete your hierarchy will look like this:



Continue this process for the other location and then if applicable add you other levels.

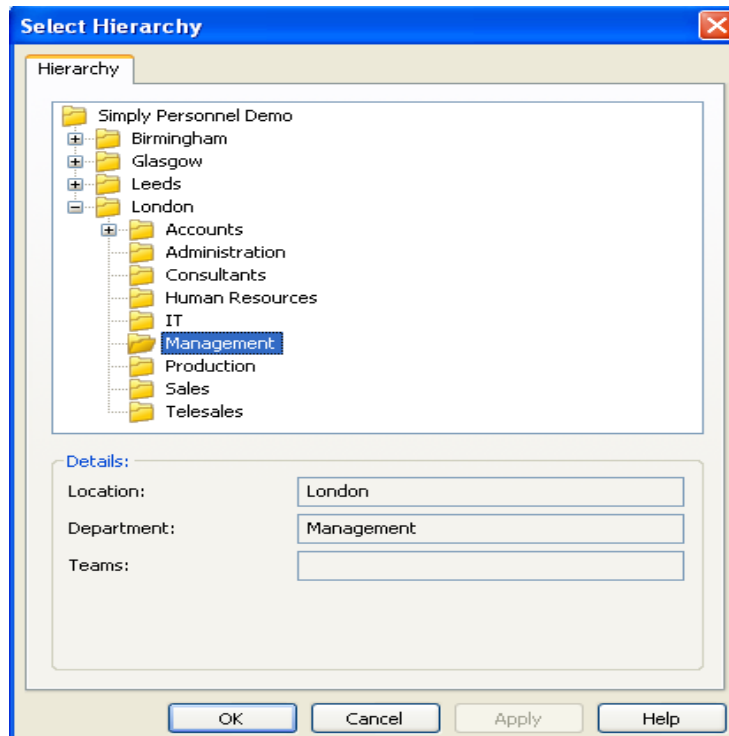
Setting Up Your Employees to Hierarchy:

When you now set up you employees job post instead of selecting the location and department from the dropdown menus you will have an option that states Hierarchy:



The above window was taken from the job history screen but this will also be shown the same when you enter a new starter.

Click on the **Set** button and this window will appear:



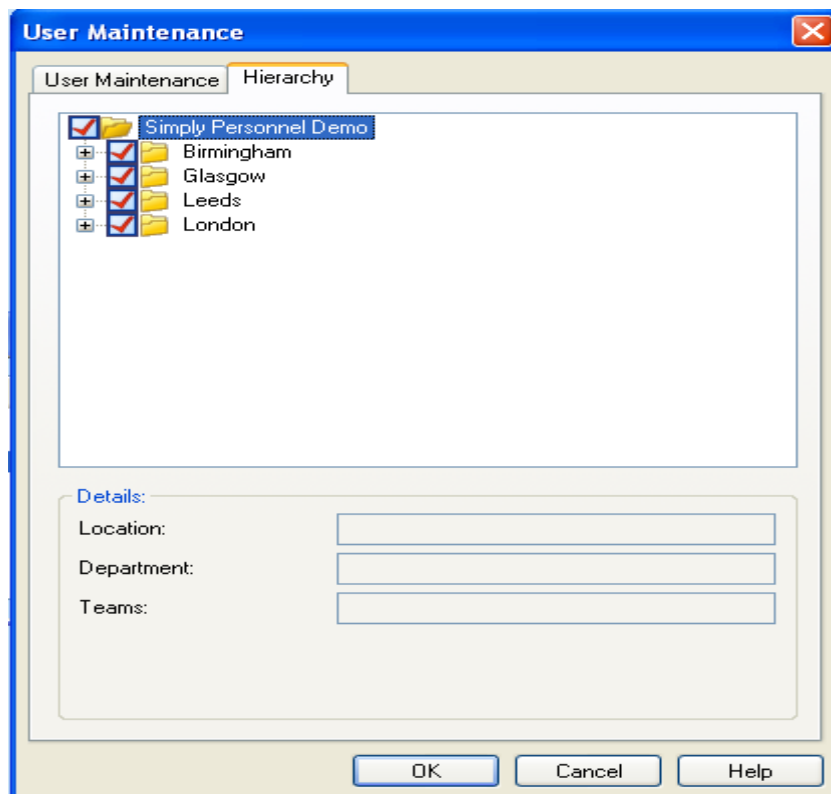
Select where your employee is situated then click on ok to set them in the hierarchy.

Changing your user maintenance:

All members of staff that have access to the Simply Personnel system will need to activate the hierarchy on there user profile. To change this, go to Security on the system setup, and then select User Maintenance.

Access Profiles
User Maintenance

Then select the user and then select the second tab labelled Hierarchy:



Tick the required box of your hierarchy, you will then be able to see the employees within that section.