



# MPHR Hierarchy Training

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## Building your Hierarchy

There are 7 Steps to follow to help you build a hierarchy in MPHR.

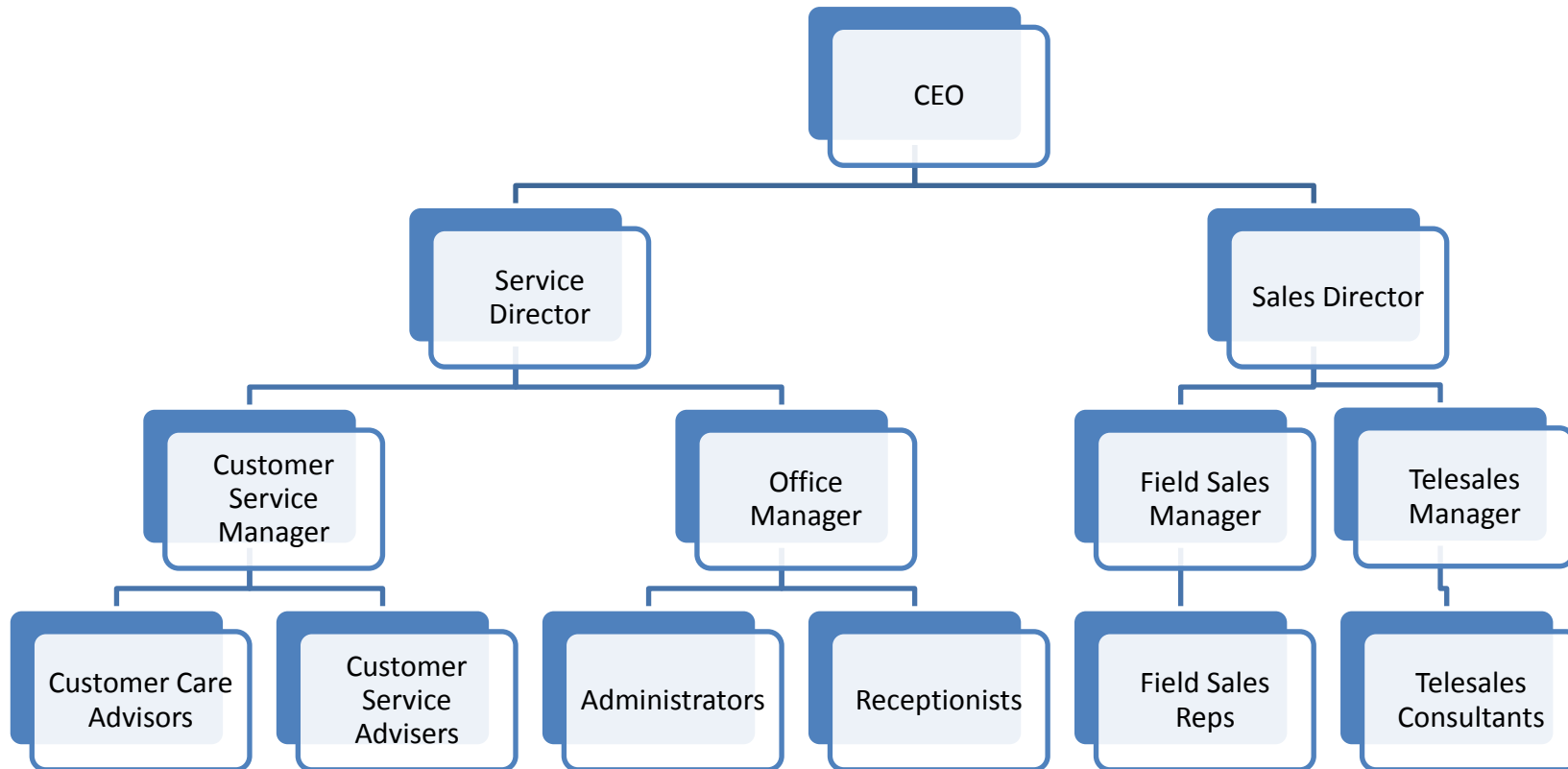
- 1 • Draw out your Hierarchy
- 2 • Create the Levels you need
- 3 • Create Organisation Units
- 4 • Create & Define Positions
- 5 • Assign positions to employees
- 6 • Create Security Profiles
- 7 • Assign Security Profiles

Throughout building (or making changes to the hierarchy) we must 'refresh the Hierarchy' to allow the changes to update in the background. You can do this as often as you like, but the changes may not show correctly if this process is not done. To see 'How To' guide, go to page 12.

## **STEP 1**

Draw out your Organisations Hierarchy. By having this in front of you, it will make it clearer to build in MPHR.

Start from the top of the tree and work your way down adding in Job titles under their Line Manager's title.

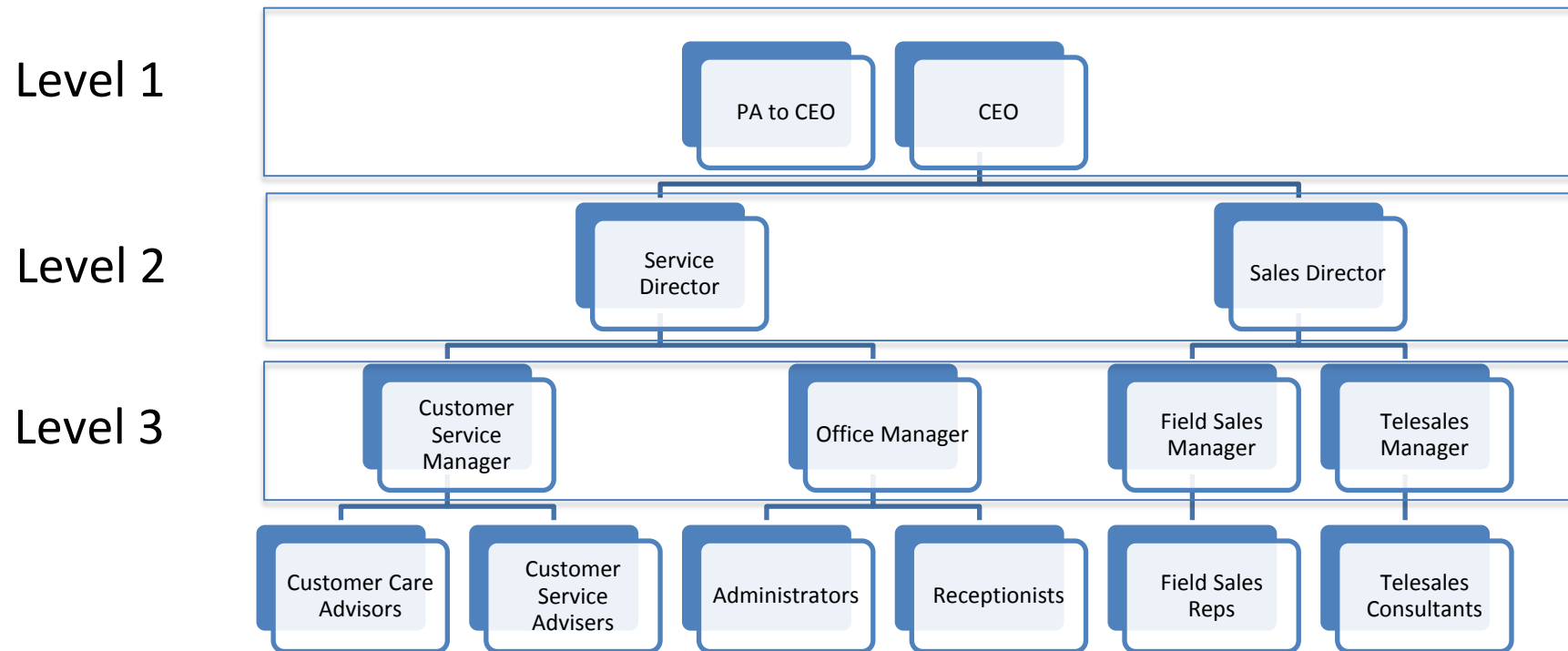


## **STEP 2**

Create the levels you need.

Only the rows which have managers in need levels creating. You can have up to 9 levels in MPHR.

Mark this out on your drawn out structure so you can see how many you will need to create.



## Creating the Levels

To create the levels, you need to go into **Administration > Organisation > Organisation Levels**

Here, you can add a New Level, or Clone and rename an existing position.

It's best to keep this simple: naming them

Level number: 1

Level Name: Level 1

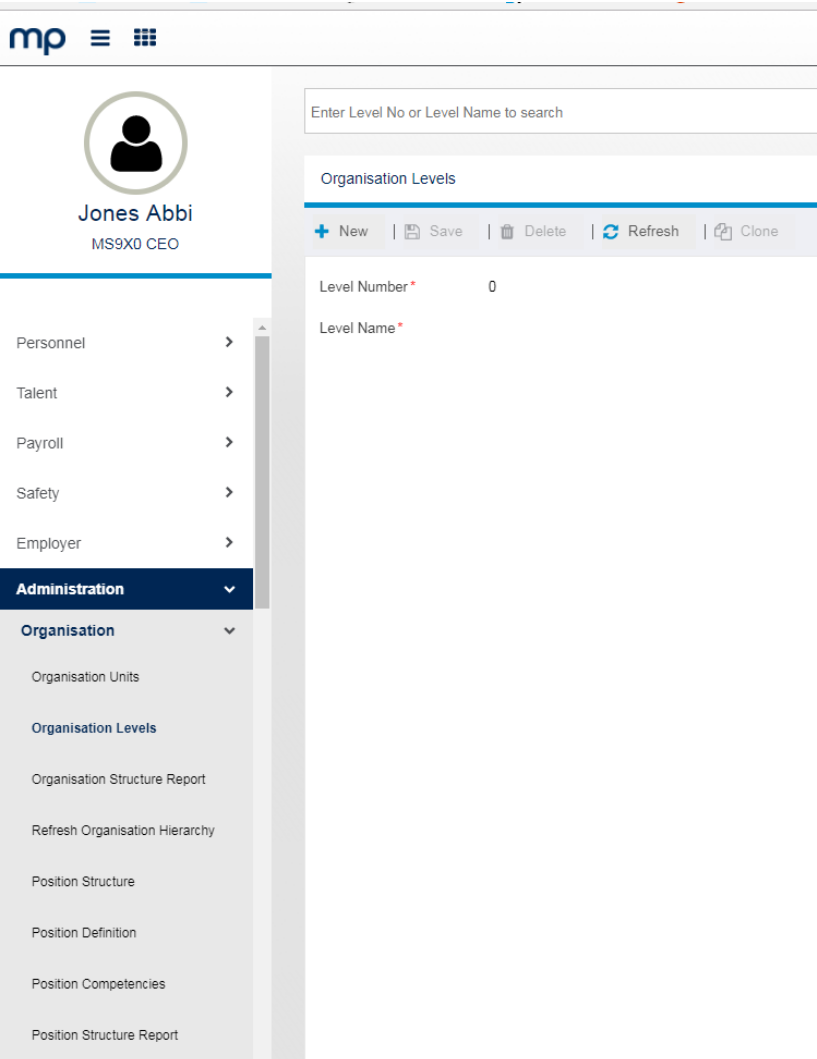
Level number: 2

Level Name: Level 2

Level number: 3

Level Name: Level 3

And so on.



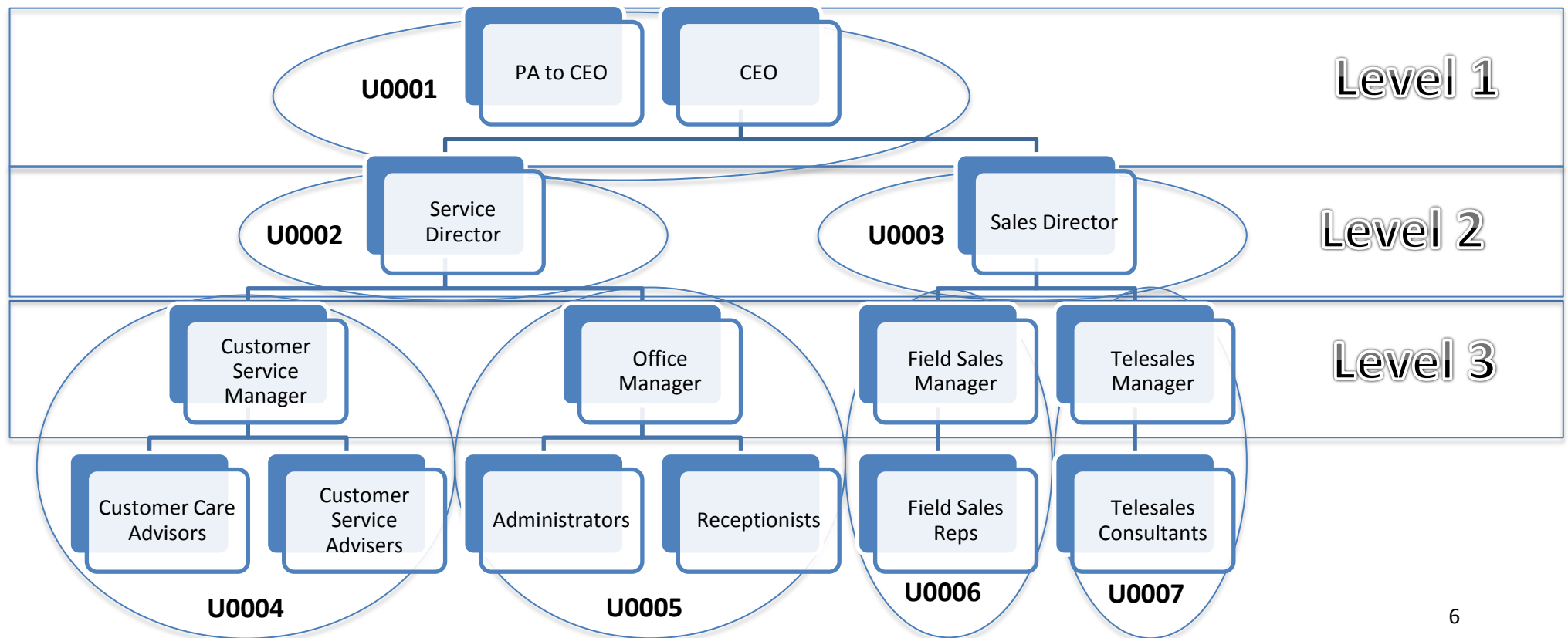
The screenshot shows the mp system interface. The left sidebar contains a navigation menu with the following items: Personnel, Talent, Payroll, Safety, Employer, Administration (expanded), Organisation (expanded), Organisation Units, Organisation Levels, Organisation Structure Report, Refresh Organisation Hierarchy, Position Structure, Position Definition, Position Competencies, and Position Structure Report. The main content area displays the 'Organisation Levels' page. At the top, there is a search bar with the placeholder text 'Enter Level No or Level Name to search'. Below the search bar, there is a table with the following columns: Level Number and Level Name. The table contains one row with the value '0' in the Level Number column. The table has a toolbar with the following actions: New, Save, Delete, Refresh, and Clone.

### **STEP 3**

Create Organisation Units.

The Organisation Units are basically the departments that you will have in your organisation. We need to split our drawn out hierarchy into departments as per the example below.

We name each Org Unit in the following format, U0001, U0002, U0003 and so on. Multiple positions can sit in the same Org Unit however there can only be one manager position in each.



## Creating the Organisation Units

To create the Org units, you need to go into **Administration > Organisation > Organisation Units**

Similar to the Levels, for Org Units you can Add or Clone to make new units.

Go from the top of your diagram and add in all the Org Units which you need.

You will need to fill in the correct level number of where your Org Unit sits and also the 'Belongs to' with the Org Unit of the level above.

\*Reminder, now would be a good time to refresh your Hierarchy. See 'How to' Guide on page 12

## **STEP 4**

Create and define Positions.

### **Go to Administration > Organisation> Position Definition**

This is where you create the Job Roles and assign them within the Org Units you have just created.

Again you can add new positions or clone existing ones.

Add in position ID's Usually we follow the format from the default positions, starting at 9999 being System Admin and 9998 being Employee Default and work backwards, so the next Position ID would be 9997, then 9996 and so on.

Again start at the top of your tree and work your way down.

mp

Abbi Jones  
CEO

Enter Position Id or Title to search

POSITION ID	STATUS	TITLE	FULL TITLE	ORG UNIT ID
9998		EMPDFLT	Employee Default	U0002
9999		SYSADM	System Administrator	U0001

Position Id \* 9998

Title \* EMPDFLT

Full Title Employee Default

Organisation Unit Id \* U0002 Location 1

Location

Classification \* 9999 Default Classification

Salary Grade \* 9999 Default Salary Grade

Seniority Level \* 4 Employee

Manager Position \* ☐ Yes ☒ No

Reports To Position 9999 SYSADM

Select which Org Unit this position sits in.

And then select their manager's position.

Multiple employees can sit within one position if they have the same job title. This only works if they have the same Line Manager, if they have a different Line Manager they will need separate positions.



## **STEP 5**

Assign positions to employees.

Go to **Personnel > Contract Details> Position**

Search for the employee that you want to allocate the position to.

Here you can use the drop down box next to Position ID to select the position you want your employee to sit in.

You will notice that their manager will show under the 'Reports to' section so you can ensure your Positions are set up correctly.

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Abbi Jones  
CEO

To Do List

**Personnel**

Basic Details

**Contract Details**

Leave Entitlements

Duties

**Position**

Position History

Enter ID Number or Name or NI Number to search

Position, ID Number: 001001, Jones Abbi, Company Code: 01, Payroll Status: Current

+ New | Save | Delete | Refresh | Clone | Drilldown | More Rows | Clear Row

POSITION I.D. 9998 EMPDFLT Apprenticeship Start Date End Date

Full Title Employee Default

Department 2 FTE 0.00

Location Job Family 0

Reports To

Reports To Position 9999 SYSADM

ID NUMBER	FULL NAME
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## **STEP 6**

Creating Security Profiles.

Any manager within your organisation will need a Security Profile set up and assigned to them. This protects what information they are able to see, the security profile is linked to their Organisation Unit.

In our diagram, the Customer Services Manager is the manager of the Org Unit U0004, therefore will need a security profile for U0004.

To create the security profiles, we will use our diagram to see how the tree reports upwards.

Start from the bottom,

U0004 is a level 3, reporting into U0002 a level 2, then into U0001 which is our level 1.

To create this, we can add new or again we can clone an existing profile.

Fill in the levels with the correct Org Units.

Go through your diagram and create profiles for every Org which has a manager in it.

Level	Org Unit	Role
Level 1	U0001	Managing Director
Level 2	U0002	Sales Director
Level 3	U0004	Service Director

\*Reminder, now would be a good time to refresh your Hierarchy. See 'How to' Guide on page 12.

## **STEP 7**

Assigning Security Profiles.

Security > Define Users.

In this screen, we give employees access to the security profile we have just created.

When you choose 'Standard' as the User Type, you will notice the 'Security Profile' box appears, here you need to pick up the profile of the Org Unit that your manager sits in.

The screenshot displays the 'Define Users' interface. On the left, a sidebar identifies the user as 'Jones Abbi, MSSX0 CEO' and lists navigation options under 'Security', with 'Define Users' currently active. The main content area shows a form for defining a user. At the top, a search bar and a summary line read: 'Define Users, ID Number: 001005, Login: JULIANB MANAGER, Name: Bishop Julian, User Type: Standard'. Below this are action buttons: '+ New', 'Save', 'Delete', 'Refresh', and 'Clone'. The form fields are as follows:

- User Type\***: Standard
- ID Number**: 001005 (dropdown), Name: Bishop Julian
- Login User Name\***: JULIANB MANAGER
- Application User Name\***: UT4H001005
- Profile Status\***: Enabled
- Group Profile\***: MANAGER (dropdown), Manager Group Profile
- Access Profile\***: MANAGER (dropdown), Manager Access
- Security Profile\***: U0007 (dropdown)
- Business Email**: (empty text field)
- Personal Email**: (empty text field)
- Administrator**: (checkbox), (Y or blank)
- Desktop to Use**: (dropdown)
- Access to User Types**: A (dropdown)

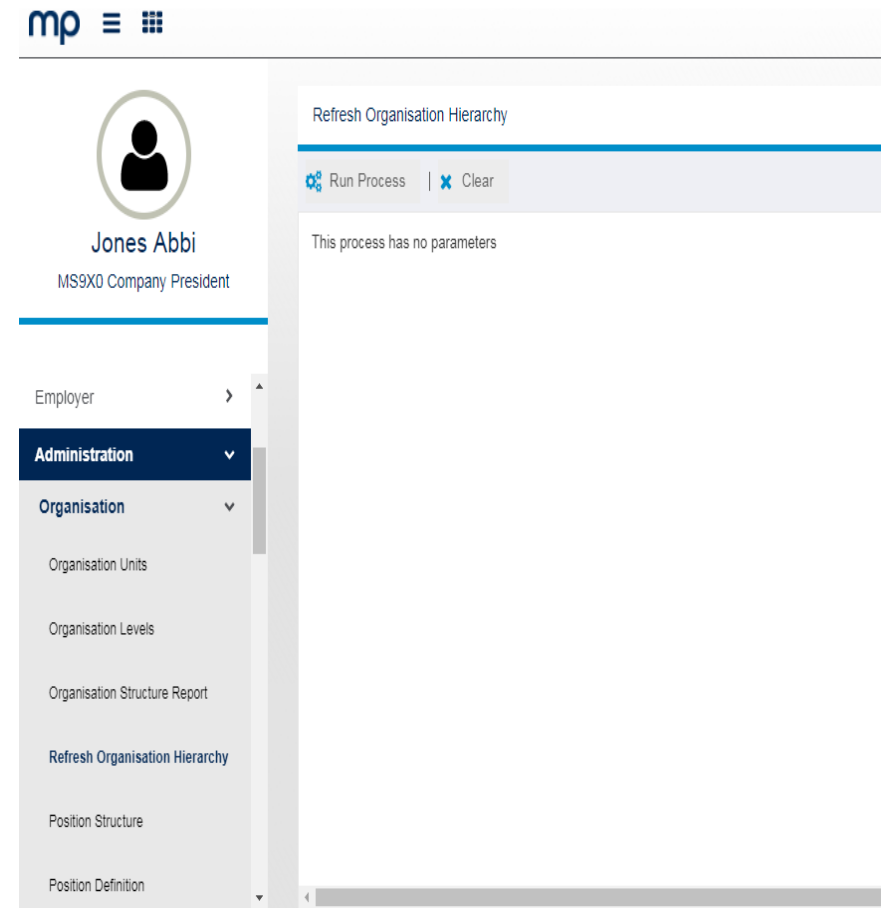
## Refresh the Hierarchy

Go to **Administration > Organisation > Refresh Organisation Hierarchy**

We refresh our Hierarchy to ensure all the background processes are complete when creating or making changes to our Hierarchy.

In this screen, you need to click 'Run Process'

Once the process has been run you will get a green notification bar to tell you it has been done.



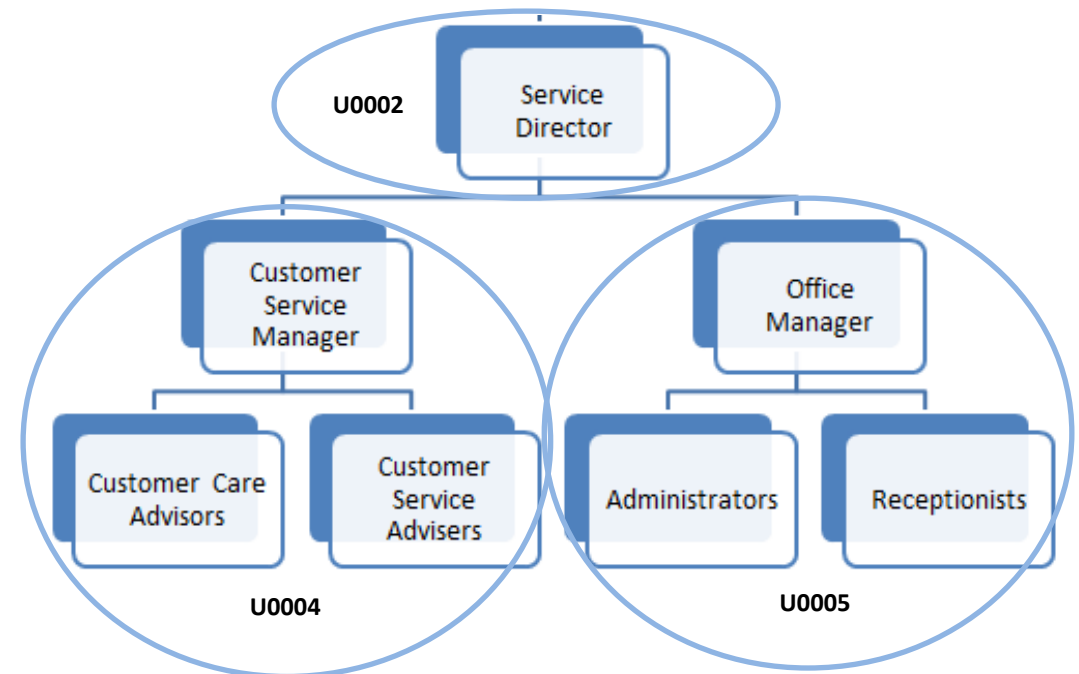
## Making Changes to a Hierarchy

Before making any changes to the hierarchy, there are many things to think about. If you are moving an employee's position, the first thing you would need to check is if the employee you wish to change is the only employee in that position or does the position have multiple employees sat within it. If they are the only employee within the position then the position can be moved. If they share the position with another employee you would need to create a new position to support the change.

Once you have decided what you will be doing with the position, you then need to look at the Organisation Unit structure. Is this position the only position in the current Organisation Unit or is the Org Unit shared with another position. If it is a shared Org Unit you will need to move the position into a different Org Unit. Can the position sit in an existing Org Unit or will you need to create a new Org Unit for them to sit into to support the change.

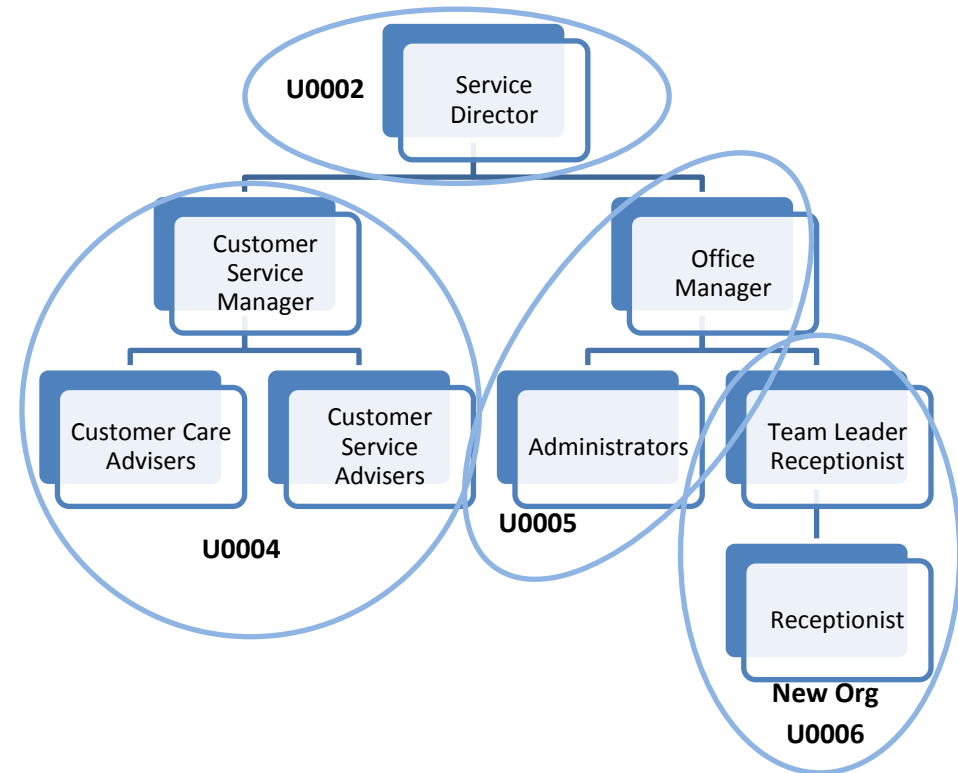
For Example: let's look at this section of our hierarchy

Scenario 1 - Sarah currently works as a Receptionist with Rob and Joe. Sarah has had a promotion and her new role is Customer Service Adviser. Because Sarah shares her role with Rob and Joe we cannot move that whole position. There is already a position with the title Customer Service Advisers therefore we would move Sarah into this position.



Scenario 2 – Sarah has become the team leader for Rob and Joe (Receptionists) therefore all their holiday request will now need to go to Sarah instead of the Office Manager. Sarah will need a new position so that Rob and Joe can report into her and following the rules of only having one manager in each Org Unit, Sarah will also need a new Org Unit creating.

Looking at the new Organisation structure, the Administrators can still share their Org Unit with the Office Manager as the Office Manager is the only position with Manager Rights, Sarah sat in Team Leader Receptionist now shares the New Org U0006 with the Receptionists Rob and Joe as they report into her.

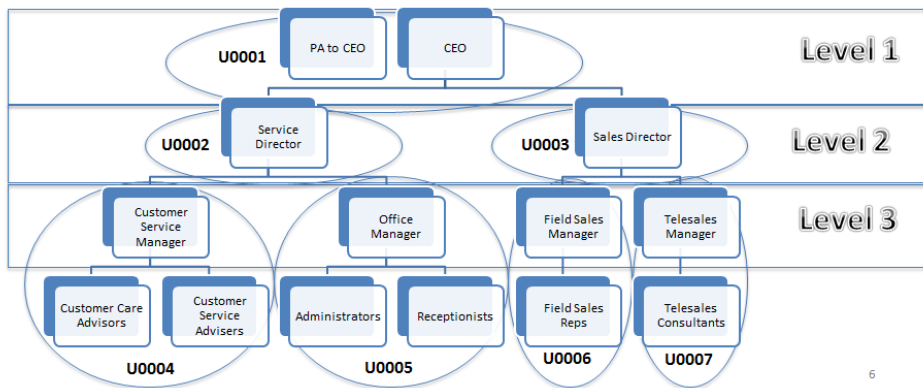


## Trouble Shooting

### Managers cannot see the correct employees

The main cause of manager not being able to see the correct employees fall on the Security Profile they have been assigned and the Security Profile it's self.

To check a Security Profile, you will need to find what Organisation Unit the Manager you are looking at sits in. Once you have this Organisation Unit number you need to see which Organisation Unit it reports into, then which Organisation Unit that Org reports into until you reach the top of the hierarchy. Once you have this information, you will need to go into **Security > Define Security Profiles** and search the Organisation Unit of the Manager you are looking at. The Security Profile for this Org Unit must match the reporting flow which you have just created (by checking which Org each report into).



For Example: looking at our Hierarchy

Our 'Office Manager' sits in U0005, which reports to U0002 this then reports to U0001. Therefore the Security Profile for U0005 needs to reflect this flow.

Define Security Profiles

+ New | Save | Delete | Refresh

Security Profile \* U0005

Pay Frequencies W F B

Active Employees Only ☐

Level 1 U0001 Company

Level 2 U0002 Service

Level 3 U0005 Office

Level 4

Define Users

+ New | Save | Delete | Refresh | Clone

User Type \* Standard

ID Number 001005 Bishop Julian

Login User Name \* jbishop@non.com

Application User Name \* (Auto Generated)

Profile Status \* Enabled

Group Profile \* MANAGER Manager Group Profile

Access Profile \* MANAGER Manager Access

Security Profile \* U0005

The final part of checking a manager has the correct access is within **Security > Define Users**. Here you need to search for the Manager and check which security profile they have assigned to them.

## Reports

There are 3 reports you can run regarding Hierarchy within MoorepayHR: Position Structure Report, Organisation Structure Report and Position Structure. All 3 of these are found within **Administration > Organisation**.

### Position Structure Report

This report is used to see which employees sit within a position and also any other positions which report into the selected position. To run the Position Structure Report, select the position you wish to look at, the Levels will default to 0 and choose 'Y' within the 'Include People' box, Select 'Run Process' this will give you a PDF document as below.

Program PP6005R	Advanced Bureau Training Db'S 01	Position Structure
CEO	9997	Company
	Emp ID	Name
	001001	Jones Abbi
Sales Director	9989	Sales Director
	Emp ID	Name
	001004	Stewart Samantha
Telesales Manager	9986	Tele Sales
	Emp ID	Name
	001019	Doggett Emily

Position Structure Report

Run Process | Clear

Position \* 9997 CEO

Levels 0

Include people Y

Number of Names to Display per Position 0

Display B

### Organisation Structure Report

The Organisation Structure Report works in the same way as the Position Structure Report however it shows which Positions sit within which Organisation Unit. Select the Organisation Unit which you wish to look at, the Levels will default to '0' and the select 'Y' within the 'Include Positions' box. Select 'Run Process' this will give you the PDF document as below.

Organisation Title	Organisation Unit No	Level
Company	U0001	Level 1
Position ID		
9997		CEO
9998		EMPDFLT
9999		SYSADM
Service	U0002	Level 2
Position ID		
9996		Service Director

Organisation Structure Report

Run Process | Clear

Organisation Unit \* U0001 Company

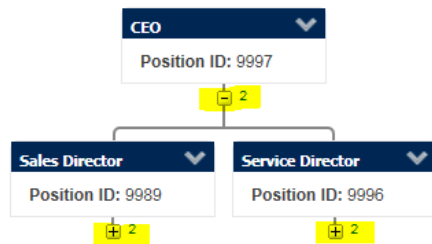
Levels 0

Include positions Y



## Position Structure


The Position Structure provides a Hierarchy Flow on a selected position with the positions which report below. Fill in the Position ID of the position you wish to look at, use the + and – boxes as shown below to open up and close further sections of the hierarchy.



To see the names of the employees who sit within each position, click the arrow in the Job Title box then choose Position Occupants, this will open a pop up showing you which employees sit within that position as shown below.



### Team Members of 9992

Office Manager	
Position ID:9992	
Position Occupants	
	ID : 001005
	Name : Bishop Julian

### Position Structure

+ New | Save | Delete | Refresh | Clone

Position Id

9997

