

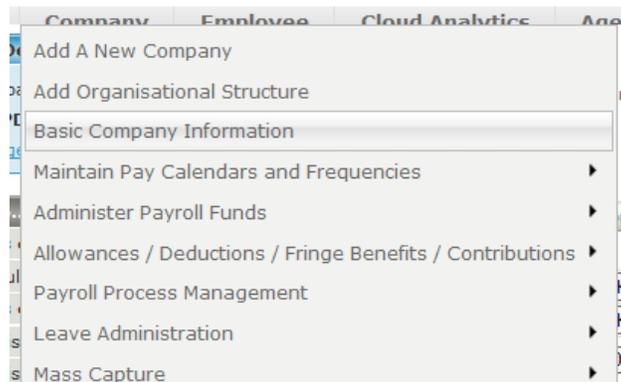
Paymaster Online Tutorial

Departments and Organizational Units

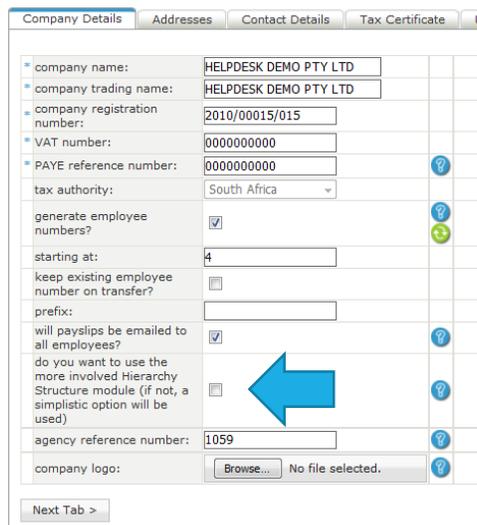
Your business is growing bigger, and you need to now separate your employees into different departments. Accounts, Sales, Management, HR etc. When you view your reports, you want to be able to see which employees are in which department. No problem! We need to set these up first. These are known as organizational units.

When you created your company on the Paymaster payroll system, there was an option you could tick on the first tab of the new company information screen asking if you want a more involved Hierarchy structure. If you took no notice of this before, it is a good idea to go and tick the block now, especially if your company is getting quite busy with lots of departments.

To get there, click on **company, basic company information**.



This is the block you are looking for.

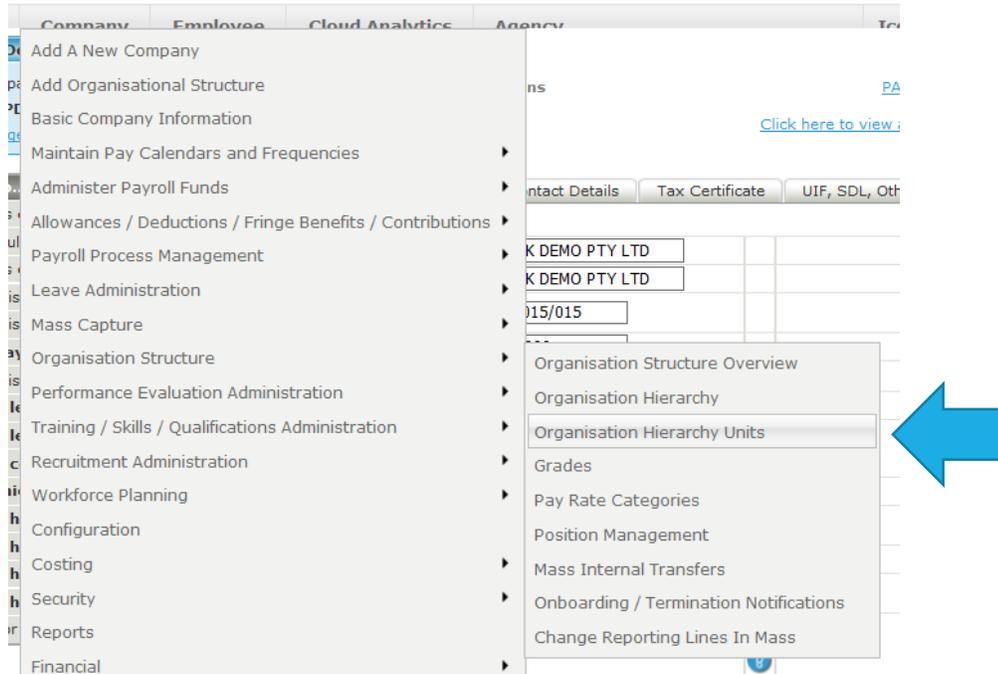
A screenshot of the 'Basic Company Information' form in the Paymaster Online application. The form has several tabs: 'Company Details', 'Addresses', 'Contact Details', 'Tax Certificate', and 'UI'. The 'Company Details' tab is active. The form contains the following fields and options:

- company name: HELPDISK DEMO PTY LTD
- company trading name: HELPDISK DEMO PTY LTD
- company registration number: 2010/00015/015
- VAT number: 0000000000
- PAYE reference number: 0000000000
- tax authority: South Africa
- generate employee numbers?
- starting at: 4
- keep existing employee number on transfer?
- prefix: (empty field)
- will payslips be emailed to all employees?
- do you want to use the more involved Hierarchy Structure module (if not, a simplistic option will be used) (This checkbox is highlighted with a blue arrow)
- agency reference number: 1059
- company logo: Browse... No file selected.

At the bottom of the form, there is a 'Next Tab >' button.

If you need to, click this block. If you are on Lite payroll, you might not have this option. You will then have a simpler version of the organizational unit setup. If you need something more involved, let us know and we will upgrade your payroll to the premier version.

In order for you to setup your hierarchy units, you need to click on **company, organization structure, organization hierarchy units**



Your screen will now look like this:

Details [Click here to view audit trail](#)

* unit description:	<input type="text"/>	
* this unit belongs on the following level:	--select one--	
this units parent unit:	--select one--	
is this the lowest unit in the organisation structure that an employee can be linked to?	<input type="checkbox"/>	
gl/unit code:	<input type="text"/>	
* upload code:	<input type="text"/>	
inactive from date:	<input type="text"/> clear	

Save

You now need to put in the details required. I am going to set up an HR organizational unit.

Details [Click here to view audit trail](#)

* unit description:	Human Resources	?
* this unit belongs on the following level:	Company	?
this units parent unit:	HELPDESK DEMO PTY LTD	
is this the lowest unit in the organisation structure that an employee can be linked to?	<input checked="" type="checkbox"/> ←	?
monthly budget:		
reference:		
gl/unit code:		?
* upload code:	hr001	?
inactive from date:	<input type="text"/> clear	?

Save

NB! Make sure that the block next to “is this the lowest unit in the organization structure that an employee can be linked to” is ticked.

The parent unit will be the Company name until you have created some organizational units.

Once you are done, click on save.

Your new organizational unit is in the system!

Save

Hierarchical View of Organisation Units [Org. Unit Report](#)

- [-] HELPDESK DEMO PTY LTD - Company
 - [-] Human Resources - Company

I have added two more – Management and Sales.

Hierarchical View of Organisation Units [Org. Unit Report](#)

- [-] HELPDESK DEMO PTY LTD - Company
 - [-] Human Resources - Company
 - [-] Management - Company
 - [-] Sales - Company

Now I want to add a section within my HR unit – I need a payroll unit as well.

When I select the parent unit, I don't select the main company, I now select the HR department.

Cloud Analytics Agency

Organisation Hierarchy Units

Details [Click here](#)

* unit description:	Payroll	?
* this unit belongs on the following level:	Company	?
this units parent unit:	--select one--	?
is this the lowest unit in the organisation structure that an employee can be linked to?	--select one-- HELPDESK DEMO PTY LTD --Human Resources --Management --Sales	?
gl/unit code:		?
* upload code:		?
inactive from date:	<input type="text"/> <input type="button" value="clear"/>	?

When I set it up like this, my payroll unit falls with my HR unit, not just under the company section.

Details [Click here to view audit trail](#)

* unit description:	Payroll	?
* this unit belongs on the following level:	Company	?
this units parent unit:	--Human Resources	?
is this the lowest unit in the organisation structure that an employee can be linked to?	<input checked="" type="checkbox"/>	?
monthly budget:	<input type="text"/>	
reference:	<input type="text"/>	
gl/unit code:	<input type="text"/>	?
* upload code:	pay001	?
inactive from date:	<input type="text"/> <input type="button" value="clear"/>	?

Save

Once you are done, click on save. Now you can see my payroll unit falls under the HR unit.

Hierarchical View of Organisation Units [Org. Unit Report](#)

- [-] HELPDESK DEMO PTY LTD - Company
 - [-] Human Resources - Company
 - [-] Payroll - Company
 - [-] Management - Company
 - [-] Sales - Company

It is a good idea to make sure this is setup first before linking your employees as they will now need to be linked to the correct organizational units on their position screen.

You can now select the new organizational unit from the drop down list on your employee's position screen.

The screenshot displays the 'Employee Position' interface. On the left, the 'Current Details' sidebar shows the employee's name as John Greenwillow and company as HELPDESK DEMO PTY LTD. The main form includes fields for effective date (1 October 2015), position in organisation (Manager), and employee organisation unit (HELPDESK DEMO PTY LTD). A dropdown menu for 'employee organisation unit' is open, listing options: Human Resources, Payroll, Management, and Sales. Below the form is a 'I want to...' menu with options like 'Add a new employee' and 'View or edit payslips'. The top navigation bar includes links for Home, Company, Employee, Cloud Analytics, Agency, and Team Help.