Organisation Structure Configuration

In this Section:

- Organisation Structure Configuration

Configuration and Administration

In this section you will be shown how to configure the *Organisation Structure* module before you start building a structure. This will be done in two main phases and the sample structure you developed above will be used:

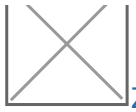
- Provide a list of what your organisation structure nodes are called.
- Stipulate which child nodes can be linked to which parent nodes. In other words what the relationships between the nodes are.

Provide the Node Types



Step 1

- Click System Administration from the **Administration Menu.**
- Open the *Organisation Structure* module by selecting **Modules | Organisation Structure | Administration | Organisation Structures.**

Zoom:

Step 2



Again from the menu, locate and open *Node Types.*

This will open the screen where the node descriptions are provided.

Zoom:

All the regular screen functionalities are available with which to *Add*, *Edit* or *Delete* records. An existing unit type is edited by clicking anywhere on the record or by clicking the View/Edit hyperlink.

Step 3

- Click **Add** to open a blank record as shown below.

Zoom:

- Provide a node's Name and Description e.g. Company.
- Click *Save* or *Save Add New* to provide successive node descriptions. The order in which they are provided is of no importance here.
- Continue in this fashion until all your node descriptions have been entered.

Provide the Node Type Relationships



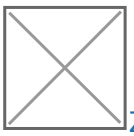
Step 4

Now it's time to provide the relationships between the different nodes.

- On the menu, from the *Administration* item select *Node Type Relationships*.

The screen below will open showing any existing relationships. This screen is interpreted as follows:

- The node in column *Linked Node Type* is linked to (or falls under) the node in the column *Node Type*.

Zoom:

Step 5

- Click ***Add*** to open a blank relationship screen as shown below.

Zoom:

- Select the parent node from the Node Type dropdown and then select its child node from the Linked Node Type dropdown.
- Click *Save* or *Save Add New* to add consecutive relationships.

Revision #1
Created 2021-03-27 15:27:44 UTC
Updated 2021-03-27 15:28:10 UTC