

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

Image not found or type unknown



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*.

image not found or type unknown



[Zoom:](#)

Step 5

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

image not found or type unknown



[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 27 March 2021 13:27:44 by Lizette Lotter

Updated 27 March 2021 13:28:10 by Lizette Lotter