How To: Organizational structures

As an administrator, you access the **organizational structures** via the menu tree under:

MASTER DATA
--> Org. structures

Creating a new organizational structure

During the **initial configuration**, a **hierarchical organizational structure** must be created first so that the workflow functionalities can be used.
The hierarchical organizational structure is used to build the **company organizational chart**. This enables new hierarchical groups to be created and assigned. After the organizational chart has been set up successfully, further organizational structures such as cost centers, loose groups, etc. can be defined.

To **add an organizational structure**, click the **"New org structure"** button; you can then fill in the following **fields**:

1) Name	**Name of the new organizational structure** (e.g. "Test Ltd. organizational chart"); this **name** must be unique and may only be assigned once
2) Description	Description of the new organizational structure
3) Client	Selection of the corresponding **client** to which the organizational structure is to be assigned (only relevant if there are several clients)
4) Organization type	The organization type determines the **behavior and relationship** of the groups to each other; during the initial configuration, only the option "hierarchical organizational structure" can be selected
5) Hierarchy Yes/No	By clicking the **checkbox** you can choose whether the organizational structure is to have a **hierarchical structure** or not; however, certain organizational structures enforce or exclude a hierarchy
6) Singular group membership	If this option is activated, a person can only be a **member of ONE group** of this organizational structure (only one project group, cost center, loose group) **at any one time**. If you assign a person to a new group of this structure, membership of the previous group is ended automatically.

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For the organization types **hierarchical organizational structure, cost center, locations** and **payroll areas**, only one org structure can exist per client. If such an org structure already exists for this client, the respective organization type can no longer be found in the dropdown list when adding.

The organization types at a glance

- **1. Hierarchical organizational structure**
  A hierarchical organizational structure must exist so that the workflow functionalities can be used. The hierarchical organizational structure is used to build the **company organizational chart**.
- **2. Cost center**

With this option you can map the company according to cost center logic. The hierarchy can be chosen freely, but an employee can only be assigned to one cost center.

- **3. Project groups**
  The company can be mapped according to project group logic. Hierarchy and singular group membership can be chosen freely.
- **4. Loose groups**
  This refers to the creation of groups that are needed individually (e.g. full-time/part-time employees, flat-rate employees, leaves of absence, resignations, etc.). Hierarchy and singular group membership can also be chosen freely here.
- **5. Locations**
  This organization type is used to create groups for different locations. There is no hierarchy here and singular group membership is fixed.
- **6. Payroll areas**
  Used to create payroll areas for the payroll system. Here, too, no hierarchies are provided and singular group membership is fixed.

Finally, click the **"Save & Close"** button to return to the list of all clients, or click **"Save"** if you want to continue editing the form.

After saving, a **confirmation** appears in the header. The **overview of the assigned groups** appears at the bottom. Since the organizational structure has just been created, no groups or roles are assigned yet.

Groups are **assigned** to the organizational structures via the **menu item "Groups"**[1] (create new group).

Editing/deleting an existing organizational structure

The **data table** shows all **existing org structures**. Using the

button, they can be **edited** and the associated **groups can be organized**.

An organizational structure can only be **deleted** if it has **no assigned groups**.
To find out whether groups exist, select the corresponding organizational structure from the overview and click the "Groups" tab. If groups exist, the organizational structure cannot be deleted (the delete button is not displayed). All **assigned groups must be deleted** first. In this case, the best procedure is as follows:

1) Delete all groups belonging to the org structure
2) Remove the organizational structure using the "Delete" button in the button bar

Felder

Name	Wert
Modul	Portal & Organisation (po)
Webdesk Actionname	po_editOrgStructures.act
Artefakt-Typ	Action

1. /daisy/webdesk-manual-en/admin/po-overview/3065-dsy/2635-dsy.html