

**[PF-41] Verify Organization functionality**

Created: 21/Apr/23 10:18 AM - Updated: 22/Jun/23 2:05 PM - Resolved: 22/Jun/23 2:05 PM

Status: Done
Project: Project final
Component/s: None
Fix Version/s: None

Type: Story
Reporter: Sabina Gabor
Resolution: Done
Labels: None
Original Estimate: Not Specified
Remaining Estimate: Not Specified
Time Spent: Not Specified

Priority: Medium
Assignee: Unassigned
Votes: 0

Description

All information about the organization, the structure and locations are defined here.

General Information

Basic details of the company can be entered on this screen. To start adding information, go to Admin>> Organization>> General Information and click "Edit".

Click "Save" once fields are entered as shown in Figure 2.6.

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General Information

Organization Name *

American Company (Pvt) Ltd

Tax ID

BS753145

Number of Employees

9

Registration Number

A23456

Phone

202-0172112345

Fax

08145788888

Email

sales_rep@benedicts.com

Address Street 1

9th Street, NW California, CA 10090

Address Street 2

City

California

State/Province

Zip/Postal Code

Country

United States

Note

IT solutions and installations

* Required field

Save

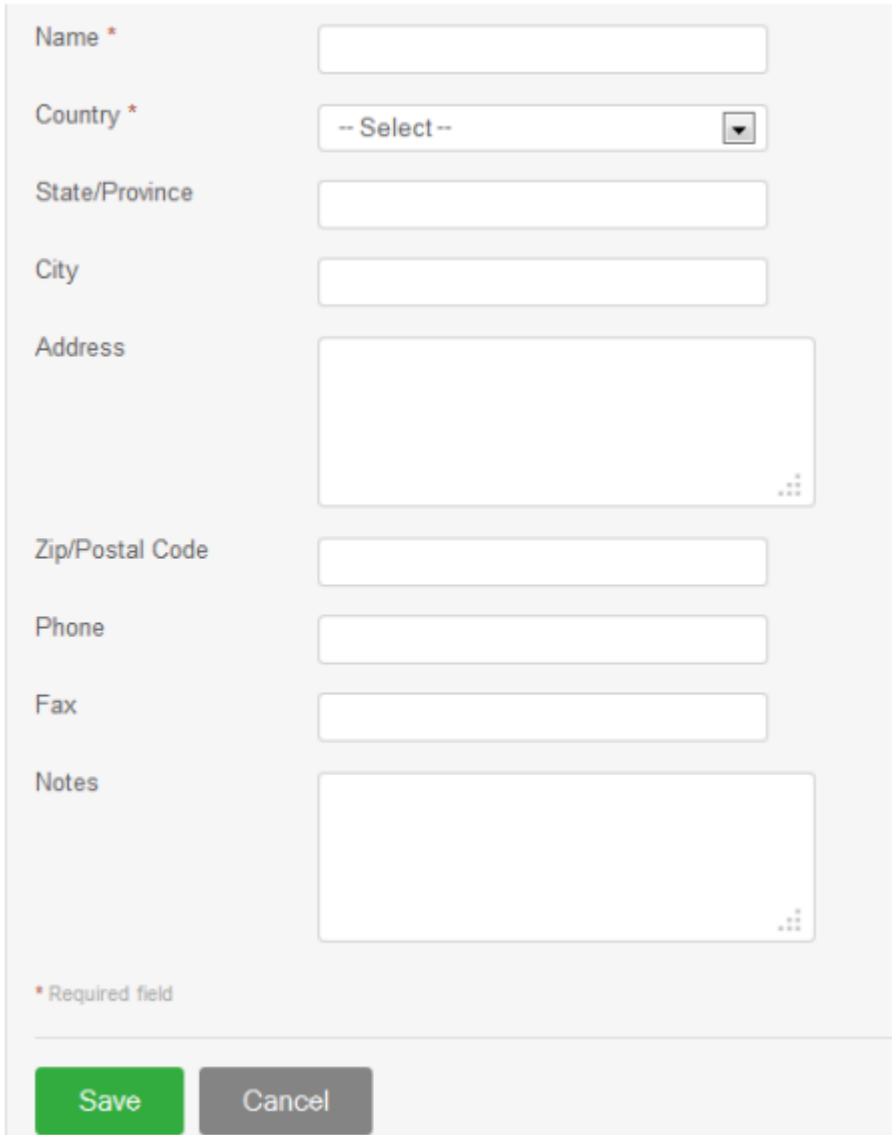
Figure 2.6: General Information

Locations

Under Locations, the HR admin can add details of sites and branches of the company. You are also able to track the number of employees working for a particular location once employees are tagged to the locations when building up the PIM Module.

To add a location go to Admin>>Organization>>Location and click “Add” and the screen as shown in Figure 2.7 would appear.

Click “Save” once the fields are added.



The screenshot shows a web form for adding a new location. The form is titled "Add Location" and contains the following fields:

- Name ***: A text input field.
- Country ***: A dropdown menu with "-- Select --" as the placeholder.
- State/Province**: A text input field.
- City**: A text input field.
- Address**: A large text area for the address.
- Zip/Postal Code**: A text input field.
- Phone**: A text input field.
- Fax**: A text input field.
- Notes**: A large text area for additional notes.

At the bottom of the form, there is a legend indicating that an asterisk (*) denotes a required field. Below the legend are two buttons: a green "Save" button and a grey "Cancel" button.

Figure 2.7: Add Location

Once a location is added, it will be listed as shown in Figure 2.8. You may also enter multiple locations. You may view location details by clicking on “Location Name”.

Add

Delete

<div><div></div></div>	Name	City	Country	Phone	Number of Employees
<div><div></div></div>	HQ	California	United States	23156234757	10
<div><div></div></div>	London	London	United Kingdom	442011134545	0

Figure 2.8: Location List

To delete a location click on the check box next to the location name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

Structure

This feature allows the admin to define the hierarchy of the company by defining sub units. Since the parent company is already defined in the General Information, it would automatically appear in the Company Structure screen.

*Note: You need to define the company name of the parent company before you create the Company Structure.

To add a sub- unit to the company structure, go to Admin>> Organization>> Structure and click on [+] as shown in Figure 2.9 and the screen shown in Figure 3.0 would appear.



Figure 2.9: Add Sub-Unit

OrangeHRM - Add Unit

Unit Id

U002

Name *

IT Division

Description

This unit will be added under U001 : American Company (Pvt) Ltd

* Required field

Save

Cancel

Figure 3.0: Sub-Unit Details

*Note: Company Structure may be defined according to the company's specifications and hierarchy. When entering the fields, you need to specify if the sub-unit is a Department, Division or Team.

Once you have entered the field, click "Save" and the Sub-Unit will appear as shown in Figure 3.1.

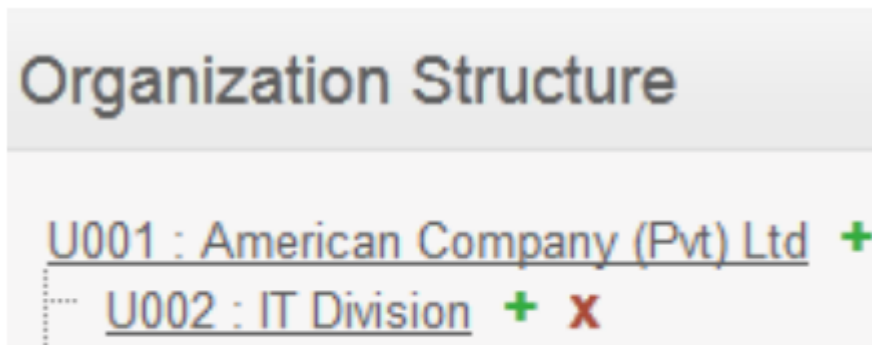




Figure 3.1: Sub-Unit Structure

You may also add further sub-units by clicking [+] option next to the relevant fields to indicate the hierarchy levels of the company and create a pyramidal structure of your organization as shown in Figure 3.2.



Figure 3.2: Company Structure Hierarchy

To delete an entry, you can simply click "[x]" next to the relevant sub units. Click "Done" below the screen to save the information. You can also collapse/expand the sub-units by clicking on the  and  on the right hand side of the sub-units to further view the company structure hierarchy.

Attachments

User Management ▾Job ▾Organization ▾Qualifications ▾NationalitiesManage NewsDocuments ▾Configuration ▾NotificationsAudit Trail

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9th Street, NW California, CA 10090

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City

California

State/Province

Zip/Postal Code

Country

United States ▾

Note

IT solutions and installations

* Required field

Save

Figure 2.6: General Information

Fig. 2.6.png (99 kB)

Name *

Country *

-- Select --

State/Province

City

Address

Zip/Postal Code

Phone

Fax

Notes

* Required field

Save

Cancel

Figure 2.7: Add Location

Fig. 2.7.png (25 kB)

AddDelete

	Name	City	Country	Phone	Number of Employees
<input type="checkbox"/>	HQ	California	United States	23156234757	10
<input type="checkbox"/>	London	London	United Kingdom	442011134545	0

Figure 2.8: Location List

Fig. 2.8.png (24 kB)

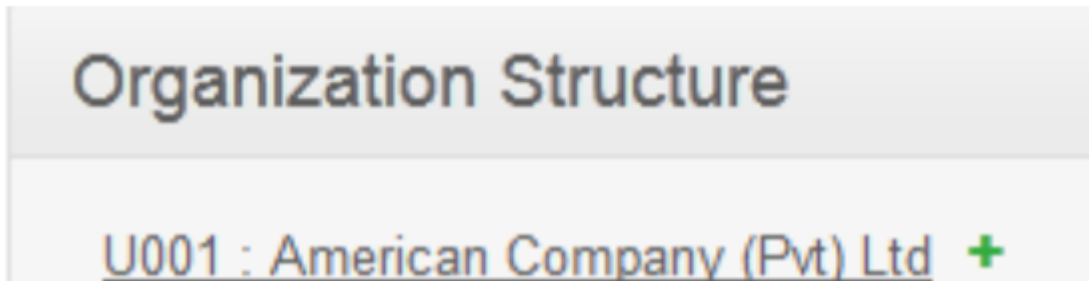


Figure 2.9: Add Sub-Unit

Fig. 2.9.png (36 kB)

OrangeHRM - Add Unit

Unit Id

U002

Name *

IT Division

Description

This unit will be added under U001 : American Company (Pvt) Ltd

* Required field

Save

Cancel

Figure 3.0: Sub-Unit Details

Fig. 3.0.png (45 kB)

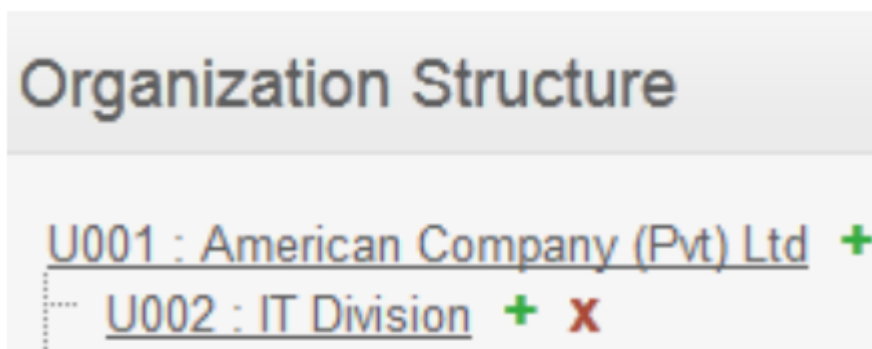


Figure 3.1: Sub-Unit Structure

Fig. 3.1.png (39 kB)



Figure 3.2: Company Structure Hierarchy

Fig. 3.2.png (80 kB)

Links			
Relates			
relates to	PF-42	Verify General Information functionality	Done
relates to	PF-43	Verify if you can add information in the General Information category	Done
relates to	PF-44	Verify the presence of the fields in the General Information category present in Figure 2.6	Done
relates to	PF-45	Verify if you can save the information without completing the required fields	Done
relates to	PF-46	Verify if you can complete the "Phone" field by adding a single digit or a number greater than 10 digits	Done

<i>relates to</i>	PF-47	Verify if you can fill in the "Email" field with random letters without @	Done
<i>relates to</i>	PF-48	Verify Location functionality	Done
<i>relates to</i>	PF-49	Verify if you can add a location and it is listed	Done
<i>relates to</i>	PF-50	Verify the presence of the fields in the "Add Location" category present in Figure 2.7	Done
<i>relates to</i>	PF-51	Verify if you can add a location without filling in the required fields	Done
<i>relates to</i>	PF-52	Verify if you can complete the "Phone" field by adding a single digit or a number greater than 10 digits	Done
<i>relates to</i>	PF-53	Verify if you can view location details after this was added and if you can edit them	Done
<i>relates to</i>	PF-54	Verify if you can delete one location or multiple at the same time	Done
<i>relates to</i>	PF-55	Verify Structure functionality	Done
<i>relates to</i>	PF-56	Verify if you can add a sub-unit to the company structure	Done
<i>relates to</i>	PF-57	Verify the presence of the fields in the "Add Sub-Unit " page, present in Figure 3.0	Done
<i>relates to</i>	PF-58	Verify if you can add a Sub-Unit to the company structure without filling in the required fields	Done
<i>relates to</i>	PF-59	Verify if you can add other subunits to the relevant fields to indicate the hierarchical levels of the company and create a pyramidal structure of the organization.	Done
<i>relates to</i>	PF-60	Verify if you can collapse/expand the sub-units	Done
<i>relates to</i>	PF-61	Verify if you can delete Sub-Units	Done
<i>relates to</i>	PF-71	The "Phone" field can be completed by adding a single digit or a number greater than 10 digits	Done
<i>relates to</i>	PF-72	You can complete the "Phone" field by adding a single digit or a number greater than 10 digits	Done
<i>relates to</i>	PF-73	A subunit can't be added to the company structure on the path mentioned in the busniess requirements	Done
<i>relates to</i>	PF-74	A subunit can't be deleted as specified in the business requirements	Done
<i>relates to</i>	PF-3	Job and Organization functionality	Done