

Organization Structure Module

User Manual - Console Interface

SONARWORKS WORKFLOW SYSTEM

Version 1.1

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1. Introduction

The Organization Structure module allows administrators to define and manage the organizational hierarchy within the Sonar Workflow System. This structure controls user access, workflow routing, and reporting capabilities.

Key Functions:

- Define corporate entities and subsidiaries
- Categorize organizations
- Create Strategic Business Units (SBUs)
- Manage branch locations
- Set up departmental structures

NOTE: Organization structure must be set up before creating workflows with access restrictions.

[Screenshot: Organization Structure Overview]

Figure: Organization Structure Overview

2. Organization Hierarchy Overview

2.1 Hierarchy Levels

Level	Description	Contains
Corporate	Top-level legal entities	SBUs
Category	Corporate classification	N/A (label only)
SBU	Strategic Business Units	Branches, Child SBUs
Branch	Physical locations/offices	Departments
Department	Functional departments	Users (via assignment)

2.2 Visual Hierarchy

Example: Organization Structure Example

Corporate: ABC Holdings Ltd

/

+-- SBU: Finance Division

/ /

/ +- Branch: Head Office

/ / +- Department: Accounts

/ / +- Department: Treasury

/ /

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|   +- Branch: Regional Office
|   +- Department: Local Accounts
|
+- SBU: Operations Division
|
+- Branch: Manufacturing Plant
    +- Department: Production
    +- Department: Quality

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2.3 Impact on System Features

Feature	How Organization Affects It
User Access	Users see workflows based on their org units
Workflow Routing	Approvers assigned by SBU/Branch
Reporting	Reports can be filtered by organization
Data Segregation	Data is partitioned by organization

3. Managing Corporates

3.1 Accessing Corporate Management

Steps:

Step 1: Navigate to Administration > Organization

Step 2: Click 'Corporates' in the sub-menu

Step 3: The Corporate List displays all entities

3.2 Creating a Corporate

Steps:

Step 1: Click '+ New Corporate' button

Step 2: Enter the corporate details

Step 3: Select a category

Step 4: Click 'Save'

3.3 Corporate Fields

Field	Required	Description
Code	Yes	Unique short code (e.g., ABC)
Name	Yes	Full legal name
Category	Yes	Classification category

Type	No	Type of entity (Holding, Subsidiary, etc.)
Address	No	Physical address
Email	No	Contact email
Phone	No	Contact phone
Website	No	Corporate website URL
Active	Yes	Whether corporate is active

[Screenshot: Corporate Form]

Figure: Corporate Form

3.4 Corporate Types

Type	Description
Holding	Parent holding company
Subsidiary	Fully owned subsidiary
Associate	Partially owned associate company
Joint Venture	Joint venture entity
Other	Other corporate types

4. Managing Categories

4.1 What Are Categories?

Categories are used to classify corporates for grouping and reporting purposes. They provide a way to organize multiple corporates by industry, function, or other criteria.

4.2 Accessing Category Management

Steps:

Step 1: Navigate to Administration > Organization

Step 2: Click 'Categories' in the sub-menu

Step 3: The Category List displays

4.3 Creating a Category

Steps:

Step 1: Click '+ New Category' button

Step 2: Enter the Category Name

Step 3: Enter an optional Description

Step 4: Click 'Save'

4.4 Category Fields

Field	Required	Description
Name	Yes	Category name (e.g., 'Financial Services')
Description	No	Explanation of the category
Active	Yes	Whether category is available for use

Example: Category Examples

Categories:

- Financial Services (*Banks, insurance, investments*)
- Manufacturing (*Production companies*)
- Retail (*Consumer sales*)
- Technology (*IT and software companies*)
- Healthcare (*Medical services*)

5. Managing SBUs (Strategic Business Units)

5.1 What is an SBU?

An SBU (Strategic Business Unit) represents a major division or business line within a corporate entity. SBUs can have their own sub-SBUs, creating a hierarchical structure.

5.2 Accessing SBU Management

Steps:

Step 1: Navigate to Administration > Organization

Step 2: Click 'SBUs' in the sub-menu

Step 3: The SBU List displays

5.3 Creating an SBU

Steps:

Step 1: Click '+ New SBU' button

Step 2: Select the parent Corporate

Step 3: Optionally select a Parent SBU (for sub-SBU)

Step 4: Enter SBU details

Step 5: Click 'Save'

5.4 SBU Fields

Field	Required	Description
Code	Yes	Unique short code (e.g., FIN-01)
Name	Yes	Full SBU name
Corporate	Yes	Parent corporate entity
Parent SBU	No	Parent SBU for hierarchical nesting
Email	No	SBU contact email
Phone	No	SBU contact phone
Address	No	SBU address if different from corporate
Active	Yes	Whether SBU is active

[Screenshot: SBU Form]

Figure: SBU Form

5.5 SBU Hierarchy

SBUs can be nested for complex organizational structures:

Example: SBU Hierarchy Example

Corporate: ABC Holdings

SBU Level 1:

- +-- Finance Division (FIN)
- +-- Operations Division (OPS)

SBU Level 2 (under Finance):

- +-- Retail Banking (FIN-RET)
- +-- Corporate Banking (FIN-CORP)
- +-- Investment Banking (FIN-INV)

6. Managing Branches

6.1 What is a Branch?

Branches represent physical locations or offices within an SBU. They are useful for geographically distributed organizations.

6.2 Accessing Branch Management

Steps:

Step 1: Navigate to Administration > Organization

Step 2: Click 'Branches' in the sub-menu

Step 3: The Branch List displays

6.3 Creating a Branch

Steps:

Step 1: Click '+ New Branch' button

Step 2: Select the parent SBU

Step 3: Enter branch details

Step 4: Click 'Save'

6.4 Branch Fields

Field	Required	Description
Code	Yes	Unique branch code (e.g., HQ-001)
Name	Yes	Branch name (e.g., 'Head Office')
SBU	Yes	Parent SBU
Address	No	Physical address
City	No	City location
Phone	No	Branch phone number
Email	No	Branch email
Active	Yes	Whether branch is active

[Screenshot: Branch Form]

Figure: Branch Form

Example: Branch Examples

SBU: Retail Banking

Branches:

- +-- Head Office (HQ-001) - City Center
- +-- Downtown Branch (DT-001) - Downtown
- +-- Airport Branch (AP-001) - Airport Area
- +-- Mall Branch (ML-001) - Shopping Center

7. Managing Departments

7.1 What is a Department?

Departments represent functional divisions within a branch. They are the lowest level of the organizational hierarchy and are often where users are directly assigned.

7.2 Accessing Department Management

Steps:

Step 1: Navigate to Administration > Organization

Step 2: Click 'Departments' in the sub-menu

Step 3: The Department List displays

7.3 Creating a Department

Steps:

Step 1: Click '+ New Department' button

Step 2: Select the parent Branch

Step 3: Enter department details

Step 4: Click 'Save'

7.4 Department Fields

Field	Required	Description
Code	Yes	Unique department code (e.g., IT-001)
Name	Yes	Department name (e.g., 'Information Technology')
Branch	Yes	Parent branch
Email	No	Department email
Phone	No	Department phone
Active	Yes	Whether department is active

Example: Department Examples

Branch: Head Office

Departments:

- +-- Information Technology (IT-001)
- +-- Human Resources (HR-001)
- +-- Finance & Accounting (FA-001)
- +-- Legal & Compliance (LC-001)

8. Organization Relationships

8.1 Parent-Child Relationships

Parent	Child	Relationship
Corporate	SBU	One-to-Many (Corporate has many SBUs)
SBU	SBU	One-to-Many (SBU can have sub-SBUs)
SBU	Branch	One-to-Many (SBU has many Branches)
Branch	Department	One-to-Many (Branch has many Departments)

8.2 Cascading Effects

Changes to parent entities may affect children:

- Deactivating a Corporate affects all its SBUs, Branches, Departments
- Deleting an SBU requires handling of child Branches first
- Moving a Branch to different SBU updates the hierarchy

WARNING: Be careful when deactivating or deleting organization entities. Consider the impact on users and workflows.

8.3 User Assignment

Users can be assigned to multiple organization units:

- Users can belong to multiple Corporates
- Users can be in multiple SBUs
- Users can work at multiple Branches
- Users typically belong to one primary Department

9. Best Practices

9.1 Planning Organization Structure

1. Map your actual organizational hierarchy first
2. Start from the top (Corporates) and work down
3. Use consistent naming conventions
4. Plan for future growth and changes
5. Keep the structure as simple as needed

9.2 Naming Conventions

Entity	Code Format	Name Format
Corporate	ABC, XYZ	ABC Holdings Ltd
Category	N/A	Financial Services
SBU	FIN-01	Finance Division
Branch	HQ-001	Head Office
Department	IT-001	Information Technology

9.3 Maintenance Recommendations

- Review organization structure annually
- Update promptly when reorganizations occur
- Deactivate rather than delete unused entities
- Document the purpose of each entity
- Keep codes unique and meaningful

9.4 Common Pitfalls

- Creating too deep a hierarchy (3-4 levels is usually enough)
- Using abbreviations that aren't clear
- Not updating structure after company changes
- Deleting entities with active users assigned
- Creating duplicate entities for temporary needs