

1.1.1 Organization Management

The System Admin can manage the organizations in this module. The Organization management has the following features:


a. New Organization Request List

The new organizations which have purchased the LMS services will be listed here for approval from the System Admin. The organizations approved by the System Admin will be added to the organization list. The System Admin can view and update the Organization data before approval by clicking on the view option. The information and address of the Organization can be viewed and updated.

Multiple branches and departments can be created under an Organization. The users are then mapped to their respective branch and departments. The organization hierarchy can also be defined in organization management. Here the various users in the hierarchy are mapped to the respective departments and higher-ups. The organization Admin can be updated in this section.

New Organization Request List

NEOBENCH




John Doe
System Admin

Dashboard

Organization Management

- [New Organizations](#)
- Organization List

User Management



New Organization Request List

[Organization Management](#) > New Organization Request List

Filter All Status


Show 10 Organizations


Search:

ALL ☒

None ☐

Excel ☐

Filter 

Select	Organization Name	Email	Contact Person	Contact no.	Business Category	Created on	Status	Actions
<input type="checkbox"/>	Organization C	orgc@email.com	Josh Doe	+91 2222222222	Accounting Firm	24 Dec 2021	Pending	 View

Showing 1 to 1 of 1 Organizations

Previous


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Organization Request List Attributes

S.No	Attribute	Description
1.	List Table	Display the list of organization requests Columns: Select, Organization Name, Email, Contact person, Contact No., Business Category, Created On, Status and Actions
2.	Status	Display the status of the request
3.	View	Click to display the details of the organization
4.	Search	Click to search the list with a keyword
5.	Filter	Filter the list based on the selected filter


View Organization Basic Info






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System Admin



View Organization
[Organization Management](#) > [Organization List](#) > View Organization

Basic Info

Address

Admin

Branches

Other Details

Organisation Name*

Organization C

Organization Type*

Private

Business Category*

Accounting Firm


Website

www.organizationc.com

Status

Active

Organization Logo



Upload

Cancel


Deny


Approve

Organization Basic Details Attributes

S.No	Attribute	Description
1.	Organization Name	Enter the Name of the Organization
2.	Organization Type	Select the Organization Type from drop down list
3.	Business Category	Select the Business Category from drop down list
4.	Website	Enter the URL of organization's website
5.	Status	Select the Status of the record
6.	Organization Logo	Click to upload the logo of the organization
7.	Cancel	Click to cancel and navigate back to the organization list
8.	Deny	Click to deny the request and revert back
9.	Approve	Click to approve the organization and it will be added to the organization list.

View Organization Address


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View Organization

[Organization Management](#) > [Organization List](#) > View Organization

Basic Info

Address

Admin

Branches

Other Details

Organization C

Address

CSK Building, Pappanamcode

Country

INDIA

State

KERALA

City

Thiruvananthapuram

Zip Code

695018

Latitude

18.99993

Longitude

72.829414

Post Office

Pappanamcode S.O

Cancel


Deny

Approve


Organization Address Attributes

S.No	Attribute	Description
1.	Address	Enter the Address of the organization
2.	Country	Select the country of the organization
3.	State	Select the state of the organization
4.	City	Select the city in which the organization is situated
5.	Zip Code	Enter the zip code of the organization
6.	Post Office	Enter the Post Office which the organization belongs to
7.	Latitude	Enter the Latitude coordinate
8.	Longitude	Enter the Longitude coordinate


View Organization Admin






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John Doe
System Admin



View Organization
[Organization Management](#) > [Organization List](#) > View Organization

Basic Info

Address

Admin

Branches

Other Details

Organization C

Organization Admin

Josh Doe

Q

Email ID

abc@gmail.com

Designation

IT MANAGER

Phone Number

+91 2222222222

User Role*

Organization Admin

Cancel


Deny

Approve


Organization Admin Attributes

S.No	Attribute	Description
1.	Organization Admin	Select a user from the Searchable dropdown to map the user as the Organization Admin
2.	Designation	Display the designation of the selected user
3.	Email ID	Display the Email ID of the selected user
4.	Phone Number	Display the phone number of the selected user
5.	User Role	Display the Role of the selected user
6.	Avatar	Display the avatar of the selected user


View Branches






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John Doe
System Admin



View Organization
[Organization Management](#) > [Organization List](#) > View Organization

Basic Info

Address

Admin

Branches

Other Details

Organization C

Show

10

Branches

Search:

Q Search All

ALL

✓

None










✗

Excel

✕

Filter

▼

Select	Branch Name	Branch Head	Designation	Email	Contact No.	Created on	Status	Actions
<input checked="" type="checkbox"/>	Branch A	Jack Doe	Branch Manager	ca@email.com	+91 7777777777	24 Dec 2021	Active	  
<input type="checkbox"/>	Branch B	Jonah Doe	Branch Manager	cb@email.com	+91 6666666666	31 Dec 2021	Active	  
<input type="checkbox"/>	Branch C	Jim Doe	Branch Manager	cc@email.com	+91 5555555555	31 Dec 2021	Active	  

Showing 1 to 3 of 3 Branches

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Next

Cancel


Deny

Approve


Add Branch






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John Doe
System Admin



Branch

Basic Info

Address

Departments

Designations

Hierarchy

Other Details

Branch Name*

Branch A

Branch Description

Branch A Description

Branch Head

Jack Doe

Q ▼

Designation

Finance Manager

Email ID

ca@email.com

Phone Number

+91 7777777777

User Role*

Training Admin

▼

Status*

Active

▼

Cancel


Save

Branches Attributes


S.No	Attribute	Description
1.	Branch Name	Enter the name of the Branch
2.	Branch Description	Enter the Branch Description

3.	Branch Head	Select a user from the searchable dropdown to map as the branch head
4.	Designation	Display the designation of the selected user
5.	Email ID	Display the email ID of the selected user
6.	Phone Number	Display the phone number of the selected user
7.	User Role	Display the role mapped to the selected user
8.	Status	Select the status of the record
9.	Save	Click to save the branch record
10.	Cancel	Click to cancel and navigate back to the Organization page

Branch Address



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Branch

Basic Info
Address
Departments
Designations
Hierarchy
Other Details

Branch A

Address*

ABC Building, Karamana

Country*

INDIA

State*

KERALA

City*

Thiruvananthapuram

Zip Code

695018

Latitude

18.99845

Longitude

72.829741

Post Office

Karamana P.O

Cancel

Save

Branch Address Attributes

S.No	Attribute	Description
1.	Address	Enter the Address of the branch
2.	Country	Select the country of the branch
3.	State	Select the state of the branch
4.	City	Select the city in which the branch is situated

5.	Zip Code	Enter the zip code of the branch
6.	Post Office	Enter the Post Office which the branch belongs to
7.	Latitude	Enter the Latitude coordinate of the branch
8.	Longitude	Enter the Longitude coordinate of the branch

Departments

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Branch

Basic Info
Address
Departments
Designations
Hierarchy
Other Details

Branch A

Department*
Admin/HR Department

Department Head
Jill Doe

Status*
Active

Save
Cancel

Show 10 Departments Search: Search All
ALL None Excel Filter

Select	Department Name	Department Head	Updated on	Status	Actions
<input checked="" type="checkbox"/>	Admin/HR Department	Jill Doe	24 Dec 2021	Active	
<input type="checkbox"/>	Finance Department	Jenna Doe	24 Dec 2021	Active	
<input type="checkbox"/>	Operations Department	James Doe	31 Dec 2021	Active	

Showing 1 to 3 of 3 Departments
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The departments are listed under each branch and can be mapped in the hierarchy section. A department head is mapped to each department.

Department Attributes


S.No	Attribute	Description
1.	Department	Select the Department from the list
2.	Department Head	Select and map the department head from the searchable dropdown
3.	Status	Select the status of the record
4.	List table	Display the list of departments Columns: Select, Department Name, Department Head, Updated-on, Status and Actions

5.	Edit	Click to edit the record
6.	Delete	Click to delete the record
7.	Status	Click to update the status

View Designations



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Branch

Basic Info
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Other Details







Branch A

Designation*
Finance Director
Department*
Finance Department

Status*
Active

Save
Cancel

Show 10 User Roles
Search Q Search All
ALL None Excel Filter

Select	Designation	Department	Updated On	Status	Actions
<input type="checkbox"/>	CEO	ALL	24 Dec 2021	Active	 
<input checked="" type="checkbox"/>	Finance Director	Finance Department	24 Dec 2021	Active	 
<input type="checkbox"/>	Finance Manager	Finance Department	24 Dec 2021	Active	 


Showing 1 to 5 of 5 User Roles
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Designation Attributes

S.No	Attribute	Description
1.	Designation	Select the Designation from the list
2.	Department	Select the department to which the designation is applicable
3.	Status	Select the status of the record
4.	List table	Display the list of departments Columns: Select, Designation, Department, Updated-on, Status and Actions
5.	Edit	Click to edit the record
6.	Delete	Click to delete the record

7.	Status	Click to update the status
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Hierarchy





John Doe
System Admin

Branch

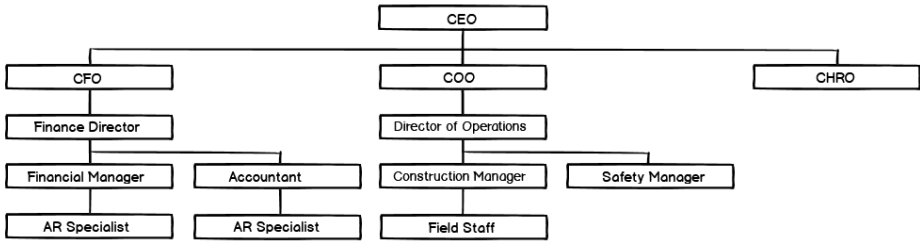
Basic Info
Address
Departments
Designations
Hierarchy
Other Details

Branch A

Designation*
CEO
Parent Designation*
NONE

Save
Cancel

Hierarchy




The hierarchy of the organization will define the levels of the organization, their departments and the users in those departments. Multiple departments are mapped to the organizations and the hierarchy levels are defined for each department.


Hierarchy Attributes

S.No	Attribute	Description
1.	Designation	Select the Designation from the list
2.	Parent Designation	Select a designation from the list to set as the parent designation for the selected designation
3.	Save	Click to save and add the designation to the hierarchy
4.	Cancel	Click to cancel and navigate back to the organization page


Branch Other Details






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Branch

Basic Info

Address

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Hierarchy

Other Details

Branch A

Whether Any Contractors?

☒ Yes
 ☐ No

Contractor Category*

Construction

Whether Sub-Contractors?

☒ Yes
 ☐ No

Sub Contractor Category*

Brick Masonry


Cancel

Save


Branch Other Details Attributes

S.No	Attribute	Description
1.	Whether Any Contractors	Select Yes or No from the radio option
2.	Contractor Category	Select the Contractor Category from the list
3.	Whether Any Subcontractors	Select Yes or No from the radio option
4.	Subcontractor Category	Select the SUBcontractor Category from the list


Organization Other Details



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View Organization

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Default language

Arabic

Cancel

Deny

Approve

Organization Other Details Attributes

S.No	Attribute	Description
1.	Default Language	Select the default language from the list.

The default language shall be applicable to the entire application across all modules. The language including the UI and menu options shall be in the language defined as default for the organization.

Once the System Admin has verified all the data of the organization they will approve it and the record will be saved to the organization list.

b. Organization List

All the organizations which have been approved will be displayed in the Organization list. The System Admin can manage the Organizations from this list.

View Organization List

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Organization List

[Organization Management](#) > Organization List

Filter

All Status

+ Add New

Show

10 Organizations

Search

Q Search All

ALL

☒ None

☒ Excel

☒ Filter

Select	Organization Name	Type	Business Category	Admin	Email	Contact no.	Created on	Status	Actions
<input checked="" type="checkbox"/>	Organization A	Private	Construction	John Doe	org@gmail.com	+91 9999999999	24 Dec 2021	Active	
<input type="checkbox"/>	Organization B	Private	Construction	Jane Doe	orgb@email.com	+91 8888888888	31 Dec 2021	Active	
<input type="checkbox"/>	Organization D	Private	Construction	James Doe	orgd@email.com	+91 7878787878	31 Dec 2021	Active	
<input type="checkbox"/>	Organization E	Private	Construction	Jenny Doe	orge@email.com	+91 2323232323	31 Dec 2021	Active	
<input type="checkbox"/>	Organization F	Public	Manufacture	Jared Doe	orgf@email.com	+91 9898989898	31 Dec 2021	Active	

Showing 1 to 5 of 5 Organizations

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Organization List Attributes

S.No	Attribute	Description
1.	List Table	Select the default language from the list.
2.	Add New	Click to add a new organization
3.	Status	Click to update the statue of the organization
4.	Edit	CLick to edit the organization details
5.	Delete	Click to delete the organization record
6.	Search	Enter keyword to search from the organization list
7.	Filter	Click to filter the organization list

Editing organization from list will load in same design as “New organization” view, instead of deny or approve there will be save or cancel buttons.

1.1.1 Packages


The Super Admin can manage the packages of the service which will be made available in the webpage.

The packages module has the following features:


a. **Packages List**

The various packages for the software service can be added here and it will be reflected in the user module webpage.

Package List



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System Admin

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Packages List

[Packages](#) > Packages List

Filter

All Status

+ Add New

Show

10

 Packages Search:

Q Search All


ALL

✓







None

✕

Excel



Filter

Select	Package Title	Mode	Pricing	No. of Users	Created on	Status	Actions
<input type="checkbox"/>	Trial Edition	Trial Mode	0.00	10	24 Oct 2021	<div><div></div>Active</div>	<div></div>
<input type="checkbox"/>	Professional Edition	Monthly Build	999.00	200	24 Oct 2021	<div><div></div>Active</div>	<div></div>
<input type="checkbox"/>	Professional Edition	Annual Build	10999.00	200	24 Oct 2021	<div><div></div>Active</div>	<div></div>


Showing 1 to 1 of 1 Packages

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Add Package






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Package Details

Package Title*
Professional Edition

Package Sub-Title
Lorem ipsum dolor

Mode*
Monthly Build

Price*
999.00

No. of Users*
100

Billed
Monthly & Yearly

Features*
Multi Language, Live Chat Support, Unlimited Courses, Custom Reports

☐ Email Support
☒ Multi Language
☒ Live Chat Support
☒ Unlimited Courses
☒ Custom Reports

Status
Active

Cancel

Save


Package Attributes


S.No	Attribute	Description
1.	Package Title	Enter the package name
2.	Package Sub Title	Enter the package Sub Title
3.	Mode	Select the package mode
4.	Price	Enter the price of the package
5.	No of users	Enter the maximum number of users for the package
6.	Billed	Select the billing type
7.	Features	Select the list of features (multi-select)
8.	Status	Select the status of the record
9.	Cancel	Click to cancel and navigate back to the package list
10.	Save	Click to save the record

b. Packages Modes

The package mode allows the Admin to manage accessibility of the software service to their customers.

Package Modes


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Package Modes

[Packages](#) > Package Modes

Package Details

Package Mode*
6 Months Build

Mode Description*
Pricing every 6 months

No. of Days*
180

Status*
Active

Save

Cancel









Show 10 Package Mode Search

ALL ☒

None ☐

Excel ☐

Filter

Select	Package Mode	Mode Description	No. of Days	Created On	Status	Actions
<input type="checkbox"/>	Trial Mode	Trial for 14 Days	14	24 Dec 2021	<input checked="" type="radio"/> Active	 
<input type="checkbox"/>	Monthly Build	Pricing every month	30	24 Dec 2021	<input checked="" type="radio"/> Active	 
<input checked="" type="checkbox"/>	6 Months Build	Pricing every 6 months	180	24 Dec 2021	<input checked="" type="radio"/> Active	 
<input type="checkbox"/>	Annual Build	Pricing every 12 months	365	24 Dec 2021	<input checked="" type="radio"/> Active	 

Showing 1 to 5 of 5 Package Modes

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Next

Package Mode Attributes

S.No	Attribute	Description
1.	Package Mode	Enter the package name
2.	Mode Description	Enter the package Sub Title
3.	No. of Days	Select the package mode
4.	Status	Select the status of the record
5.	Cancel	Click to cancel and navigate back to the package list
6.	Save	Click to save the record