

# Customize the Organization Structure

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## Overview

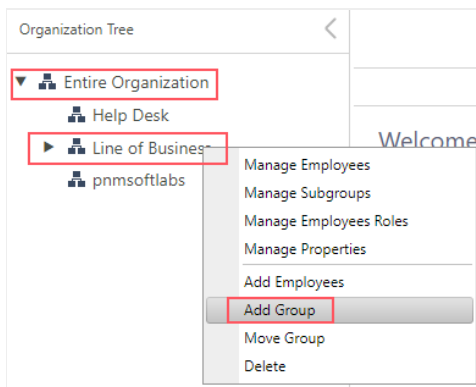
In Cora Underwriting Manager, you can build your own organization structure with as many teams as you need, add members to these teams and allocate the work between the teams according to any logic you need.

### NOTE

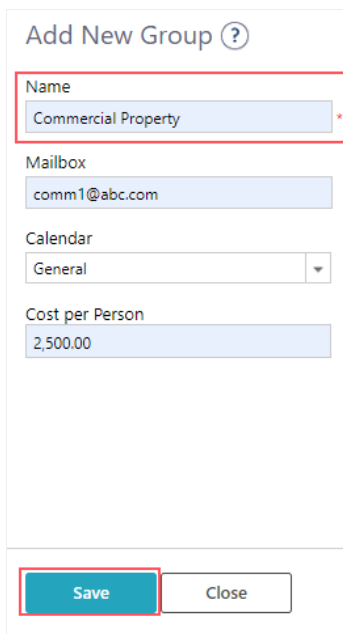
Teams in Cora Underwriting Manager are referred to as Groups, and team members are referred to as Employees.

## Add a group

1. In the Administration site homepage, in the Manage Organization tile click **Edit Organization**.  
The Organization Management page appears in a separate window.
2. In the left panel, right-click the **Entire Organization**.
3. Click **Add Group**.

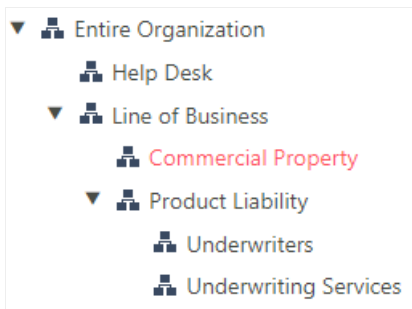


4. Enter a name for the group, and then click **Save**.

A screenshot of the 'Add New Group' form. The form has a title 'Add New Group' with a help icon. It contains several input fields: 'Name' (with 'Commercial Property' entered and an asterisk indicating it's mandatory), 'Mailbox' (with 'comm1@abc.com' entered), 'Calendar' (with a dropdown menu set to 'General'), and 'Cost per Person' (with '2,500.00' entered). At the bottom, there are two buttons: 'Save' (highlighted with a red box) and 'Close'.

Only the fields marked with an asterisk (\*) are mandatory.

As Cora Underwriting Manager supports different lines of business (LoB) so, you can create a team for each LoB, as shown below.



### IMPORTANT

- All logical exception tasks are assigned to the UWA (Underwriter assistant) role. Make sure to assign this role to at least one team member in each team.
- All technical exception tasks are assigned to the Help Desk team. Make sure to include Help Desk as a Group.

### Add Employees and Roles to a Group

1. In the Administration site, navigate to display the Organization Management page.
2. Right-click the **Entire Organization** in the left panel.
3. Click **Add Employees**.
4. Select the employee from the Employees list and move to the Selected Employees list.  
You can also search for employees with their names or email IDs in the Employees search box.
5. Select specific roles to assign to the selected employee.  
You can assign multiple roles to one employee if you want.
6. Click **Save**.

