

Manage Organization Settings

Last Modified on 07/03/2024 5:51 am EDT

Starting with V10.0, Cora SeQuence has been renamed to Cora Orchestration.

V10.7

Overview

Cora Orchestration provides a robust OBS (organizational breakdown structure) mechanism capable of handling large organizations with thousands of groups and subgroups. On the Organization Management page, based on your role you can create and manage organization groups and subgroups, add and edit employees, and assign roles to employees, among other things.

The screenshot shows the Cora Orchestration interface. On the left is the 'Organization Tree' with a sidebar menu containing 'Entire Organization', 'Sales', 'North Sales', 'South Sales', and 'sharon'. The main content area has tabs for 'Employees', 'Subgroups', 'Employee Roles', and 'Properties'. A search bar is present with the text 'Search for an employee in Entire Organization'. Below the tabs, a table titled 'Employees in Entire Organization' is displayed. The table has columns for 'Edit', 'Last Name', 'First Name', 'E-mail', 'Roles', 'Group Manager', 'Move', and 'Remove'. The table contains four rows of employee data. Below the table is a '+ Add Employees' button.

Edit	Last Name	First Name	E-mail	Roles	Group Manager	Move	Remove
	Administrator	Global			<input checked="" type="checkbox"/>	→	×
	Administrator	System			<input checked="" type="checkbox"/>	→	×
	Developer	Sha		Employee, HotOperati...	<input type="checkbox"/>	→	×
	GlobalAdmin	Sha		Employee, HotOperati...	<input type="checkbox"/>	→	×

Managing your organization breakdown structure

In the Administration site home page, in the Manage Organization card, select **Edit Organization**. The Organization Management page opens in a separate tab in the browser.

You can manage your organization breakdown structure directly from the organization tree, using the right-click menu. You can also use the navigation tabs, which provide the same functionality.

The Organization Tree pane is visible by default, and displays the first 20 groups for a Global Admin and a developer. An Access Controlled user can view only the groups they have access to. You can configure the number of groups that are displayed at a time.

To help you manage very large organization structures, with many groups and subgroups, you can hide the Organization Tree pane and work with the tabs.

Configuring the organization tree

You can set up application variables to change the default behavior of the Organization Tree.

Key	Description	Values
Administration.Organization.Tree.Visible	Hides or shows the organization tree.	True (default) False
Administration.Organization.Tree.PageSize	Specifies the number of: <ul style="list-style-type: none"> Groups displayed by default Groups that load when user clicks Load more 	Numeric numbers <ul style="list-style-type: none"> Default: 20 0: displays all groups, without "Load more"

Main actions

Action	Description
Load more groups	<ul style="list-style-type: none"> By default, the organization tree displays up to 20 groups at a time. To view additional groups, click Load more.
Expand/Collapse organization tree	<ul style="list-style-type: none"> If the organization tree is configured to display in our system, you can use the Expand/Collapse icon to show or hide the tree. The tree is expanded by default. Collapsing the Organization Tree is helpful when you handle very large organizations because you can work directly on the required groups, without the need to locate them in a very long list with a complex hierarchical structure. The system remembers the user's last state, and displays the same when next time the user accesses the Organization Management page.
Manage organization with tab functionality	<ul style="list-style-type: none"> The following tabs are available: <ul style="list-style-type: none"> Employees: Add employees to a subgroup, or edit existing employees. Subgroups: View all subgroups within a group, or add new subgroups. Employee Roles: Assign roles to employees within a subgroup or add employee to the selected group. <div style="background-color: #e1f5fe; padding: 5px; margin: 5px 0;"> <p>TIP If you need to assign roles to a large number of employees in that group, click Assign Roles, and then select the employees and the role or roles that you want to assign to them.</p> </div> Properties: Edit the name of the subgroup.

Action	Description
Copy Teams and Roles <i>(V10.6 onwards)</i>	<ul style="list-style-type: none"> You can copy team memberships and roles from one employee to other employees. You can either additionally assign team memberships and roles of one employee to others, or override the employees' earlier team memberships and roles and assign the "from user's". <div data-bbox="480 461 1415 551" style="background-color: #e1f5fe; padding: 5px;"> <p>NOTE This action is not available to the Access Controlled users.</p> </div>
Navigate to subgroups	<ul style="list-style-type: none"> You can navigate between groups through the organization tree, or by clicking a step in the breadcrumb trail on top of the page. Groups that have been synced from an Active Directory are marked as such.
Search	<ul style="list-style-type: none"> A search box is available on all pages. The search feature searches for groups or employees <i>within the selected group</i>. To search within the entire organization, you need to select Entire Organization. The Search field displays automatic suggestions that match the text that you type in.
Add group	<ul style="list-style-type: none"> You can add a subgroup from the organization tree, or from the Subgroups tab. <div data-bbox="480 1216 1415 1332" style="background-color: #e1f5fe; padding: 5px;"> <p>NOTE You can perform this action only if you are a Global Admin, a Developer, or an Access Controlled user with Full Control role.</p> </div>
Move group	<p>To move a group, you can:</p> <ul style="list-style-type: none"> Drag it to the required group in the organization tree. Right click on the group and click the move option. <div data-bbox="480 1538 1415 1641" style="background-color: #e1f5fe; padding: 5px;"> <p>NOTE You can perform this action only if you are a Global Admin or a Developer access level.</p> </div>

Action	Description
Add employee to group	<ul style="list-style-type: none"> • You can add employees from the organization tree, or from the Employees tab. • The list of employees displays up to 200 names. • To find specific employees, search for their names. • To select all the employees in the organization, select the Select all Employees option. <div data-bbox="480 499 1414 613" style="background-color: #e1f5fe; padding: 5px;"> <p>NOTE You can perform this action only if you are a Global Admin, a Developer, or an Access Controlled user with Team Admin or Full Control role.</p> </div>
Assign roles	<ul style="list-style-type: none"> • To assign roles to employees, use the <i>Employees Roles in Group</i> tab. • To assign a role or a number of roles to a large number of employees within a subgroup, go to the <i>Assign Roles</i> page. <div data-bbox="480 819 1414 1205" style="background-color: #e1f5fe; padding: 5px;"> <p>NOTES</p> <ul style="list-style-type: none"> • You can perform this action only if you are a Global Admin, a Developer, or an Access Controlled user with with Team Admin or Full Control role. • The Assign Roles page is useful when you have big groups of people that need to be assigned to specific roles. • You can select Select All to assign roles to all the employees. • If you do not select a role that is already assigned to an employee, that role is not removed from the employee. The Assign Roles page only assigns roles. It does not remove roles. </div>
Set group property	<ul style="list-style-type: none"> • You can access the properties of a subgroup from the organization tree > Manage Properties, or from the Properties tab. • On the subgroup properties page, you can: <ul style="list-style-type: none"> ◦ Edit the subgroup's name, and other properties, such as Calendar, and Cost per Person. ◦ Move the subgroup to a different location in the organization hierarchy. ◦ Delete the subgroup <div data-bbox="480 1601 1414 1715" style="background-color: #e1f5fe; padding: 5px;"> <p>NOTE You can perform this action only if you are a Global Admin, a Developer, or an Access Controlled user with Full Control role.</p> </div>

Action	Description
Edit employee details	<ul style="list-style-type: none"> There are a couple of ways to access the Edit Employee Details page. <ul style="list-style-type: none"> Search for the employee, and from the list of results, click the employee name. <div style="border: 1px solid #add8e6; padding: 5px; margin-top: 10px;"> <p>NOTE You can perform this action only if you are a Global Admin, a Developer, or an Access Controlled user with Team Admin or Full Control role.</p> </div>
Delete employees	<ul style="list-style-type: none"> You can delete employees from any of the employees groups. Locate the employee name, and then click the delete button. You can delete all employees from the employee list by clicking the Remove All. <div style="border: 1px solid #add8e6; padding: 5px; margin-top: 10px;"> <p>NOTE You can perform this action only if you are a Global Admin, a Developer, or an Access Controlled user with Team Admin or Full Control role.</p> </div>

V10.6

Overview

Cora Orchestration provides a robust OBS (organizational breakdown structure) mechanism capable of handling large organizations with thousands of groups and subgroups. On the Organization Management page you can create and manage organization groups and subgroups, add employees, and assign roles to employees, among other things.

The screenshot shows the 'Employees in Entire Organization' page in Cora Orchestration. The interface includes a navigation menu on the left with 'Entire Organization', 'Sales', 'North Sales', 'South Sales', and 'sharon'. The main content area has tabs for 'Employees', 'Subgroups', 'Employee Roles', and 'Properties'. A search bar is present with the text 'Employee Search for an employee in Entire Organization'. Below the search bar is a table titled 'Employees in Entire Organization' with the following columns: Edit, Last Name, First Name, E-mail, Roles, Group Manager, Move, and Remove. The table contains four rows of data:

Edit	Last Name	First Name	E-mail	Roles	Group Manager	Move	Remove
	Administrator	Global			<input checked="" type="checkbox"/>		
	Administrator	System			<input checked="" type="checkbox"/>		
	Developer	Sha		Employee, HotOperati...	<input type="checkbox"/>		
	GlobalAdmin	Sha		Employee, HotOperati...	<input type="checkbox"/>		

Below the table is a blue button labeled '+ Add Employees'.

Managing your organization breakdown structure

To access the Organization Management page, on the Administration site home page, select **Edit Organization**.

The Organization Management page opens in a separate tab in the browser.

You can manage your organization breakdown structure directly from the organization tree, using the right-click menu. You can also use the navigation tabs, which provide the same functionality.

The Organization Tree pane is visible by default, and displays the first 20 groups. You can configure the number of groups that are displayed at a time.

To help you manage very large organization structures, with many groups and subgroups, you can hide the Organization Tree pane and work using the tabs.

Configuring the organization tree

You can set up application variables to change the default behavior of the Organization Tree.

Key	Description	Values
Administration.Organization.Tree.Visible	Hides or shows the organization tree.	True (default) False
Administration.Organization.Tree.PageSize	Specifies the number of: <ul style="list-style-type: none">Groups displayed by defaultGroups that load when user clicks Load more	Numeric numbers Default: 20 0: displays all groups, without "Load more"

Main actions

Action	Description
Load more groups	<ul style="list-style-type: none">By default, the organization tree displays up to 20 groups at a time.To view additional groups, click Load more.
Expand/Collapse organization tree	<ul style="list-style-type: none">If the organization tree is configured to display in our system, you can use the Expand/Collapse icon to show or hide the tree. The tree is expanded by default.Collapsing the Organization Tree is helpful when you handle very large organizations because you can work directly on the required groups, without the need to locate them in a very long list with a complex hierarchical structure.The system remembers the user's last state, and displays the next time the user accesses the Organization Management page.

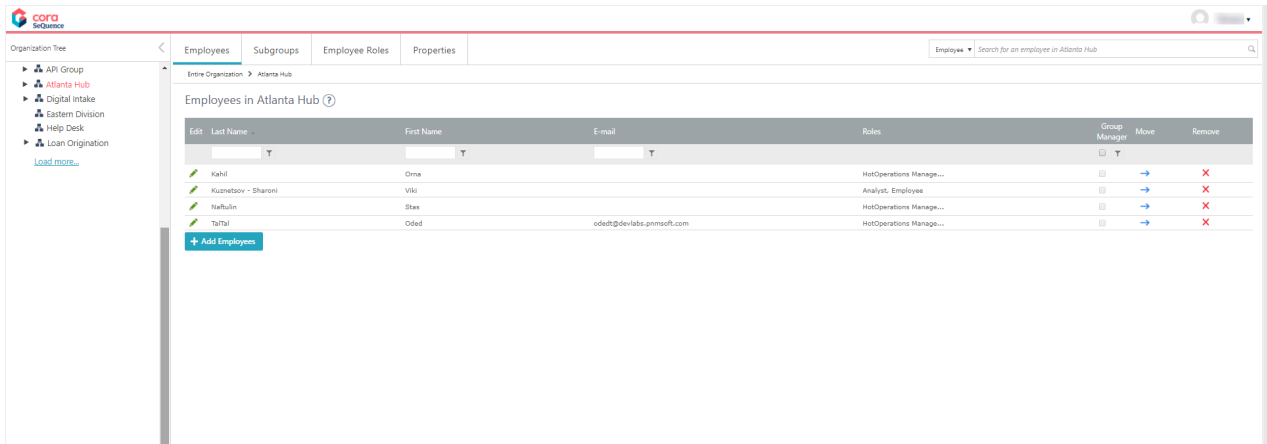
Action	Description
Manage organization with tab functionality	<ul style="list-style-type: none"> • The following tabs are available: <ul style="list-style-type: none"> ◦ Employees: Add employees to a subgroup, or edit existing employees. ◦ Subgroups: View all subgroups within a group, or add new subgroups. ◦ Employee Roles: Assign roles to employees within a subgroup or add employee to the selected group. Tip: If you need to assign roles to a large number of employees in that group, click Assign Roles, and then select the employees and the role or roles that you want to assign to them. ◦ Properties: Edit the name of the subgroup.
Copy Teams and Roles (V10.6 onwards)	<ul style="list-style-type: none"> • You can copy team memberships and roles from one employee to other employees. • You can either additionally assign team memberships and roles of one employee to others, or override the employees' earlier team memberships and roles and assign the "from user's".
Navigate to subgroups	<ul style="list-style-type: none"> • You can navigate between groups through the organization tree, or by clicking a step in the breadcrumb trail on top of the page. • Groups that have been synced from an Active Directory are marked as such.
Search	<ul style="list-style-type: none"> • A search box is available on all pages. • The search feature searches for groups or employees <i>within the selected group</i>. • To search within the entire organization, you need to select Entire Organization. • The Search field displays automatic suggestions that match the text that you type in.
Add group	<ul style="list-style-type: none"> • You can add a subgroup from the organization tree, or from the Subgroups tab.
Move group	<p>To move a group, you can:</p> <ul style="list-style-type: none"> • Drag it to the required group in the organization tree • Use the move icon () next to it on the Subgroups tab • Click Move on the Properties tab, or on the organization tree.

Action	Description
Add employee to group	<ul style="list-style-type: none"> You can add employees from the organization tree, or from the Employees tab. The list of employees displays up to 200 names. To find specific employees, search for their names. To select all the employees in the organization, select the Select all Employees option.
Assign roles	<ul style="list-style-type: none"> To assign roles to employees, use the <i>Employees Roles in Group</i> tab. To assign a role or a number of roles to a large number of employees within a subgroup, go to the <i>Assign Roles</i> page. <div style="background-color: #e1f5fe; padding: 10px; margin-top: 10px;"> <p>NOTES</p> <ul style="list-style-type: none"> The Assign Roles page is useful when you have big groups of people that need to be assigned to specific roles. You can select Select All to assign roles to all the employees. If you do not select a role that is already assigned to an employee, that role is not removed from the employee. The Assign Roles page only assigns roles. It does not remove roles. </div>
Set group property	<ul style="list-style-type: none"> You can access the properties of a subgroup from the organization tree > Manage Properties, or from the Properties tab. On the subgroup properties page, you can: <ul style="list-style-type: none"> Edit the subgroup's name, and other properties, such as Mailbox, Calendar, and Cost per Person. Move the subgroup to a different location in the organization hierarchy. Delete the subgroup
Edit employee details	<ul style="list-style-type: none"> There are a couple of ways to access the Edit Employee Details page. <ul style="list-style-type: none"> From any of the employees lists, locate the employee name, and then click the edit button. Search for the employee, and from the list of results, click the employee name.

V9.0-V10.5.x

Overview

Cora SeQuence provides a robust OBS (organizational breakdown structure) mechanism capable of handling large organizations with thousands of groups and subgroups. On the Organization Management page you can create and manage organization groups and subgroups, add employees, and assign roles to employees, among other things.



Managing your organization breakdown structure

To access the Organization Management page, on the Administration site home page, select **Edit Organization**.

The Organization Management page opens in a separate window.

You can manage your organization breakdown structure directly from the organization tree, using the right-click menu. You can also use the navigation tabs, which provide the same functionality.

The Organization Tree pane is visible by default, and displays the first 20 groups. You can configure the number of groups that are displayed at a time.

To help you manage very large organization structures, with many groups and subgroups, you can hide the Organization Tree pane and work using the tabs.


Configuring the organization tree

You can set up application variables to change the default behavior of the Organization Tree.

Key	Description	Values
Administration.Organization.Tree.Visible	Hides or shows the organization tree.	True (default) False
Administration.Organization.Tree.PageSize	Specifies the number of: <ul style="list-style-type: none"> Groups displayed by default Groups that load when user clicks Load more 	Numeric numbers Default: 20 0: displays all groups, without "Load more"

Main actions

Action	Description
Load more groups	<ul style="list-style-type: none"> By default, the organization tree displays up to 20 groups at a time. To view additional groups, click Load more.

Action	Description
Expand/Collapse organization tree	<ul style="list-style-type: none"> • If the organization tree is configured to display in our system, you can use the Expand/Collapse icon to show or hide the tree. The tree is expanded by default. • Collapsing the Organization Tree is helpful when you handle very large organizations because you can work directly on the required groups, without the need to locate them in a very long list with a complex hierarchical structure. • The system remembers the user's last state, and displays the next time the user accesses the Organization Management page.
Manage organization with tab functionality	<ul style="list-style-type: none"> • The following tabs are available: <ul style="list-style-type: none"> ◦ Employees: Add employees to a subgroup, or edit existing employees. ◦ Subgroups: View all subgroups within a group, or add new subgroups. ◦ Employee Roles: Assign roles to employees within a subgroup or add employee to the selected group. Tip: If you need to assign roles to a large number of employees in that group, click Assign Roles, and then select the employees and the role or roles that you want to assign to them. ◦ Properties: Edit the name of the subgroup.
Navigate to subgroups	<ul style="list-style-type: none"> • You can navigate between groups through the organization tree, or by clicking a step in the breadcrumb trail on top of the page. • Groups that have been synced from an Active Directory are marked as such.
Search	<ul style="list-style-type: none"> • A search box is available on all pages. • The search feature searches for groups or employees <i>within the selected group</i>. • To search within the entire organization, you need to select Entire Organization. • The Search field displays automatic suggestions that match the text that you type in.
Add group	<ul style="list-style-type: none"> • You can add a subgroup from the organization tree, or from the Subgroups tab.
Move group	<p>To move a group, you can:</p> <ul style="list-style-type: none"> • Drag it to the required group in the organization tree • Use the move icon () next to it on the Subgroups tab • Click Move on the Properties tab, or on the organization tree.

Action	Description
Add employee to group	<ul style="list-style-type: none"> You can add employees from the organization tree, or from the Employees tab. The list of employees displays up to 200 names. To find specific employees, search for their names. To select all the employees in the organization, select the Select all Employees option.
Assign roles	<ul style="list-style-type: none"> To assign roles to employees, use the <i>Employees Roles in Group</i> tab. To assign a role or a number of roles to a large number of employees within a subgroup, go to the <i>Assign Roles</i> page. <div data-bbox="533 689 1414 994" style="background-color: #e1f5fe; padding: 10px; margin-top: 10px;"> <p>NOTES</p> <ul style="list-style-type: none"> The Assign Roles page is useful when you have big groups of people that need to be assigned to specific roles. You can select Select All to assign roles to all the employees. If you do not select a role that is already assigned to an employee, that role is not removed from the employee. The Assign Roles page only assigns roles. It does not remove roles. </div>
Set group property	<ul style="list-style-type: none"> You can access the properties of a subgroup from the organization tree > Manage Properties, or from the Properties tab. On the subgroup properties page, you can: <ul style="list-style-type: none"> Edit the subgroup's name, and other properties, such as Mailbox, Calendar, and Cost per Person. Move the subgroup to a different location in the organization hierarchy. Delete the subgroup
Edit employee details	<ul style="list-style-type: none"> There are a couple of ways to access the Edit Employee Details page. <ul style="list-style-type: none"> From any of the employees lists, locate the employee name, and then click the edit button. Search for the employee, and from the list of results, click the employee name.