# Manage Organisations

https://cclearninghub.co.uk/docs/manage-organisations/

## Manage Organisations

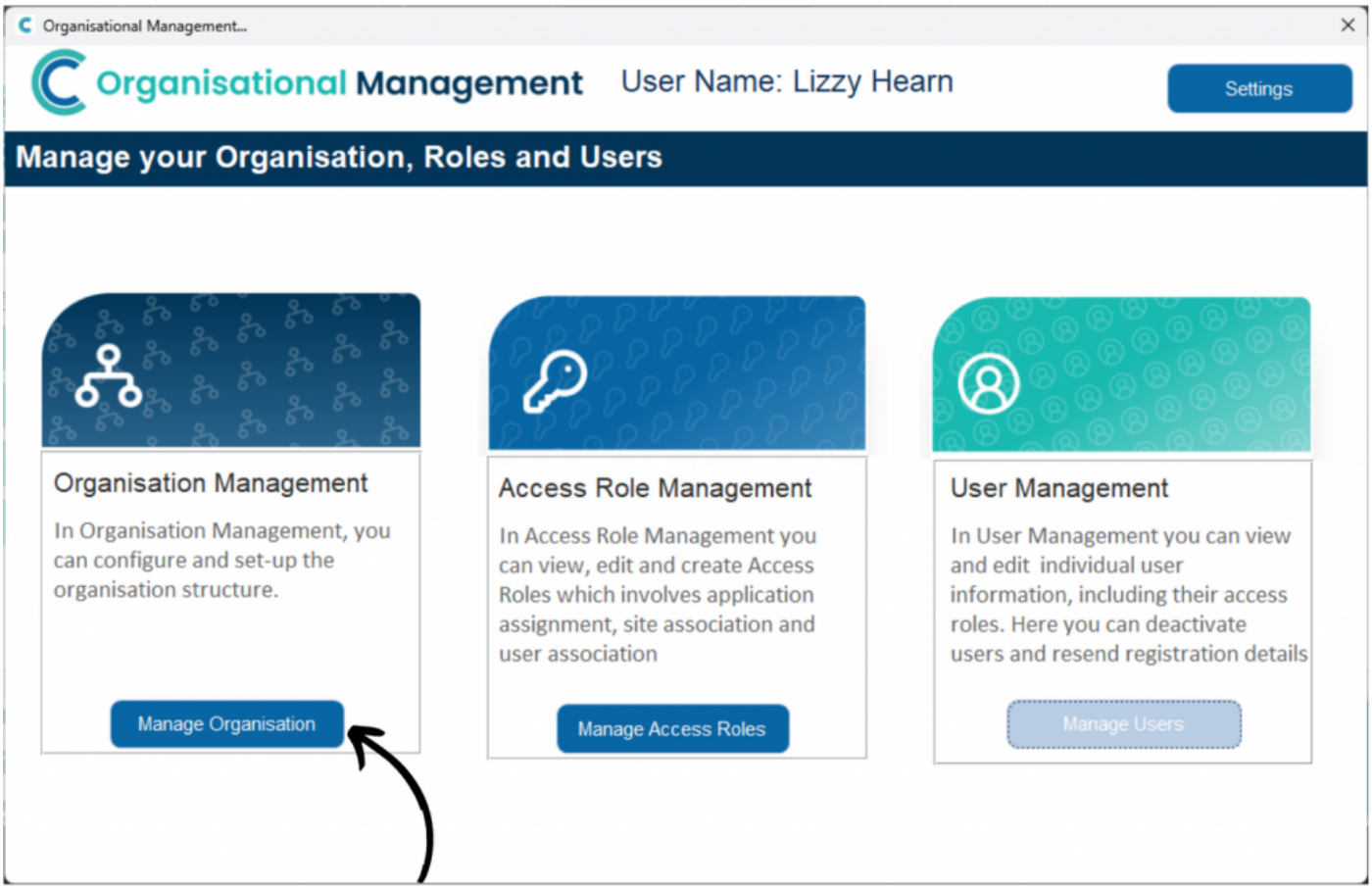
This guide will cover how to use the ‘Manage Organisations’ module within the Organisational Management (OM) tool.

For an introduction and explanation of the new tool, please see the following:

Introduction to OM – Care Control Learning Hub (cclearninghub.co.uk)

Embedded media:

https://player.vimeo.com/video/846641084?color&autopause=0&loop=0&muted=0&title=0&portrait=0&byline=0&h=6da3




## 1

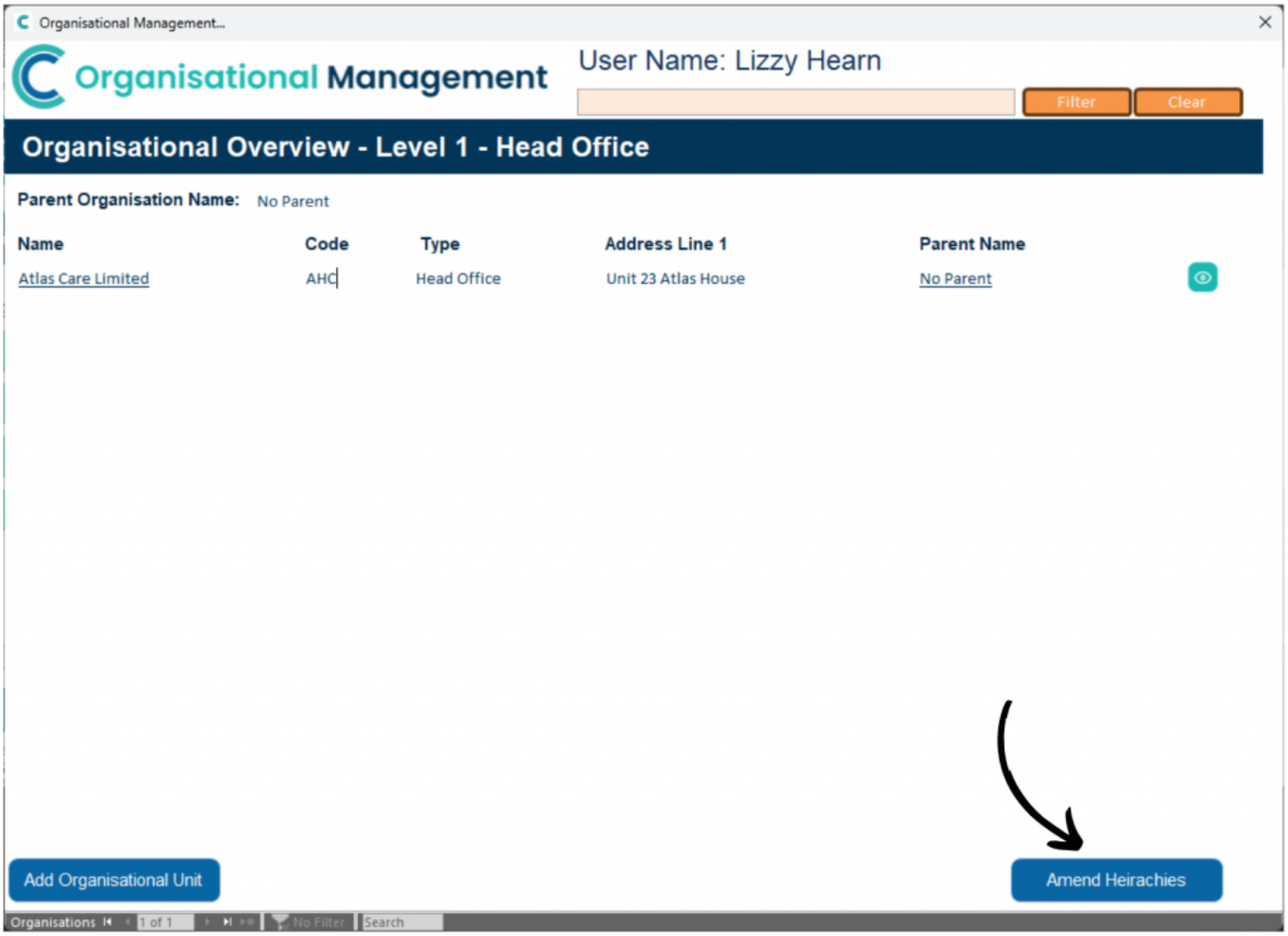
Begin in the **Organisational Management** tool, which can be found under the Advanced Stuff tab of Care Control Windows.

Here, select **Manage Organisation**.

## 2

A new window will open. Here, your organisational overview will be displayed. This will contain the top level of your organisation, usually the Head Office.

To amend the labels associated with each level, or the order in which they show, press **Amend Hierachies**.






## 3

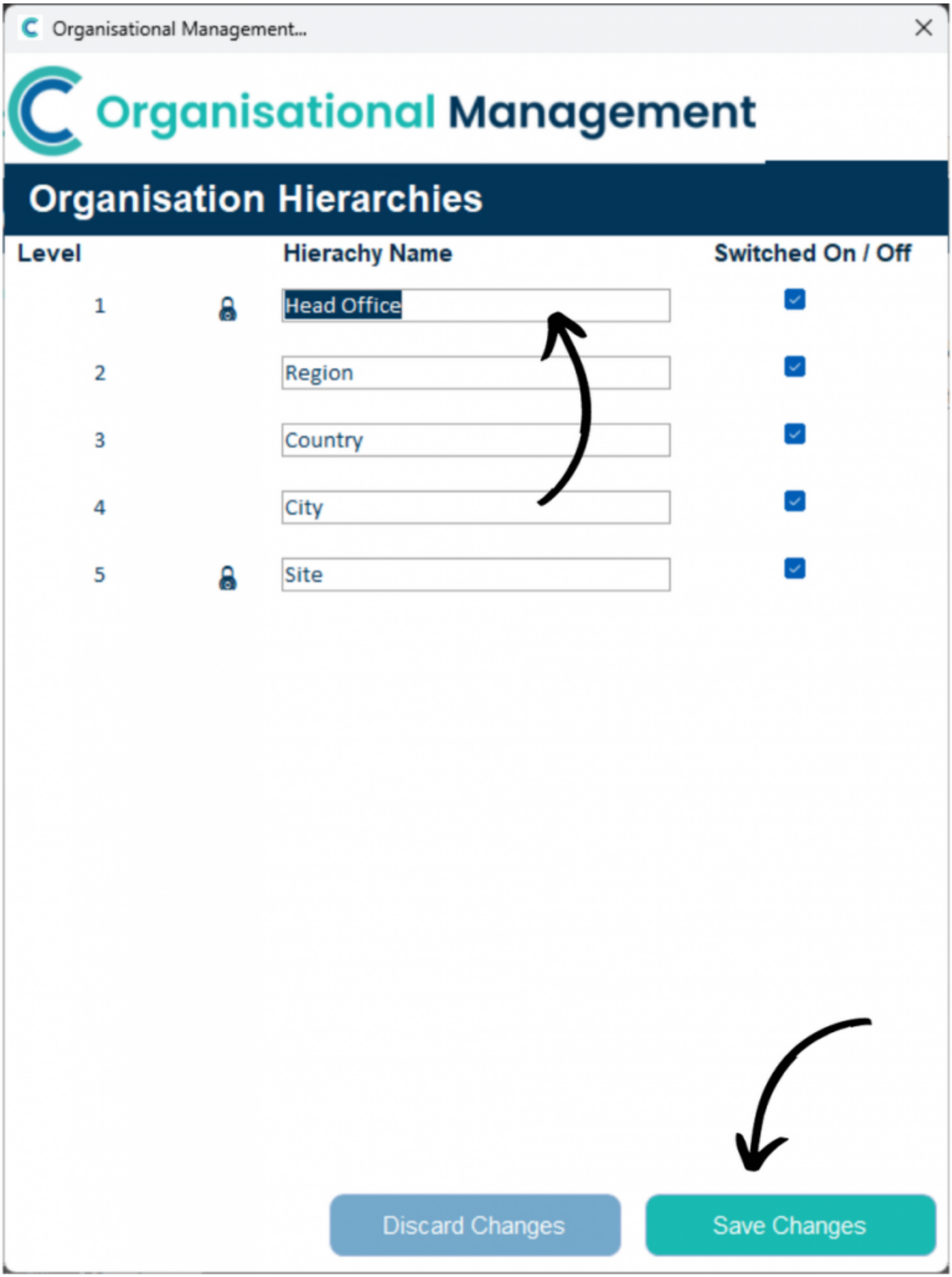
A list of the default levels will show. Here you can **switch on / off** each level accordingly.

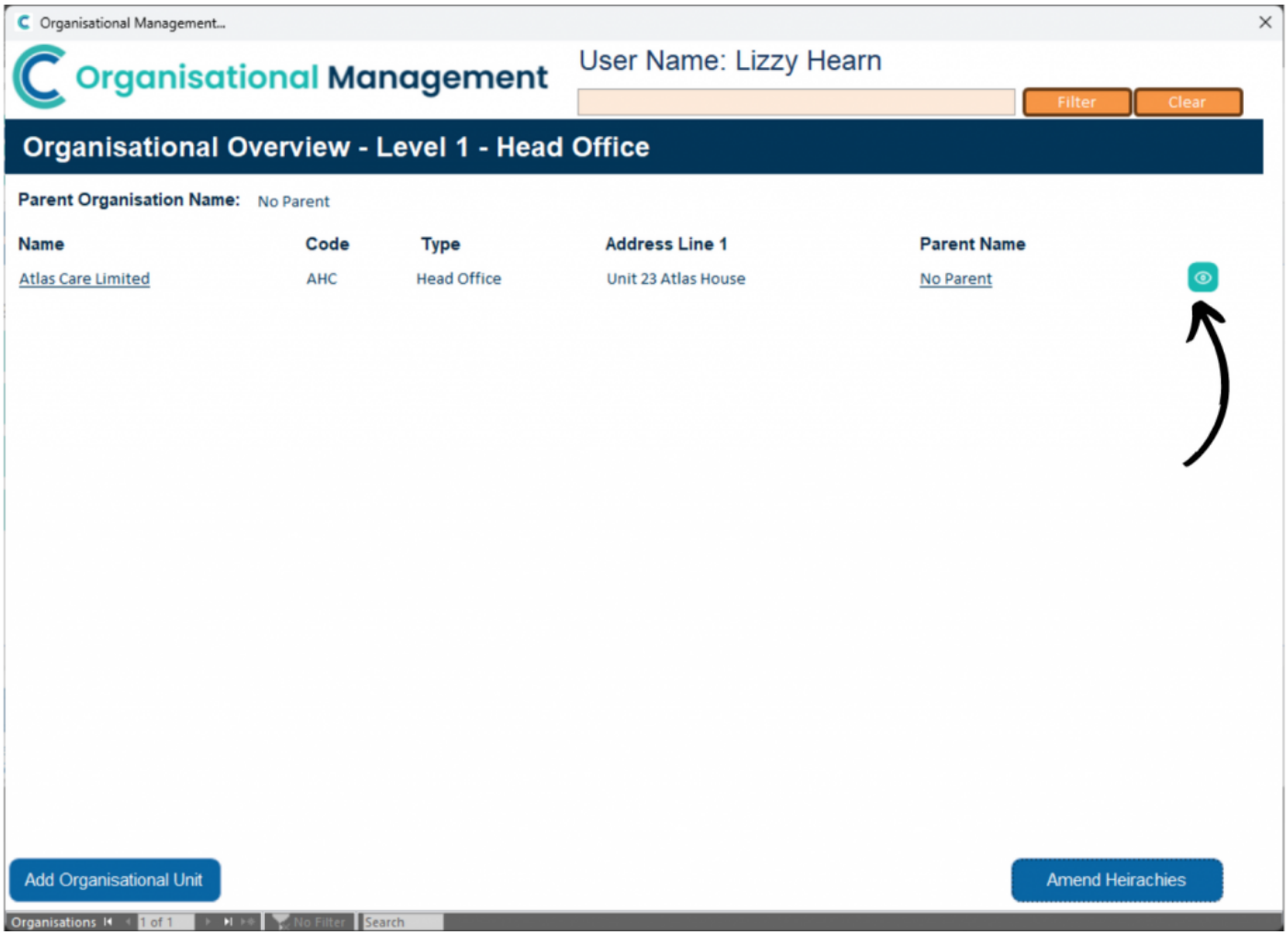
Press **Edit Hierarchies** to amend the names.

*Note: level 1 & 5, head office and site, can be renamed but not switched off as these as the minimum levels required for an organisation.*

## 4

Simply change the name of the level in the text box and press **Save Changes** when complete.


Organisational Management...
Organisational Management
Organisation Hierarchies
Level
Hierachy Name
Switched On / Off
1
Head Office
2
Region
3
Country
4
City
5
Site
Discard Changes
Save Changes

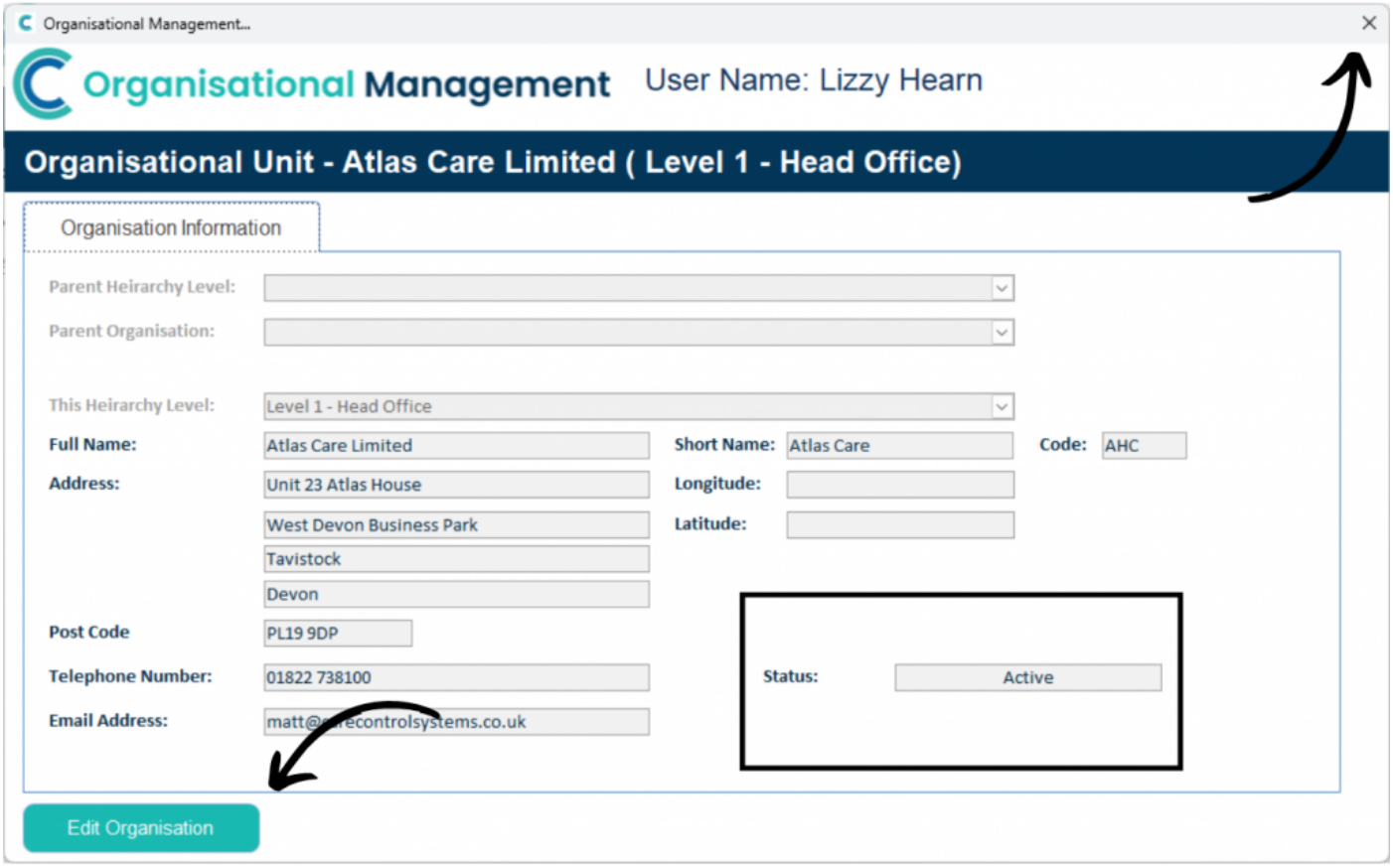



## 5

After returning to the **Manage Organisations** window, press the **Eye Icon** to the right of the row to view information about the organisation level.

## 6

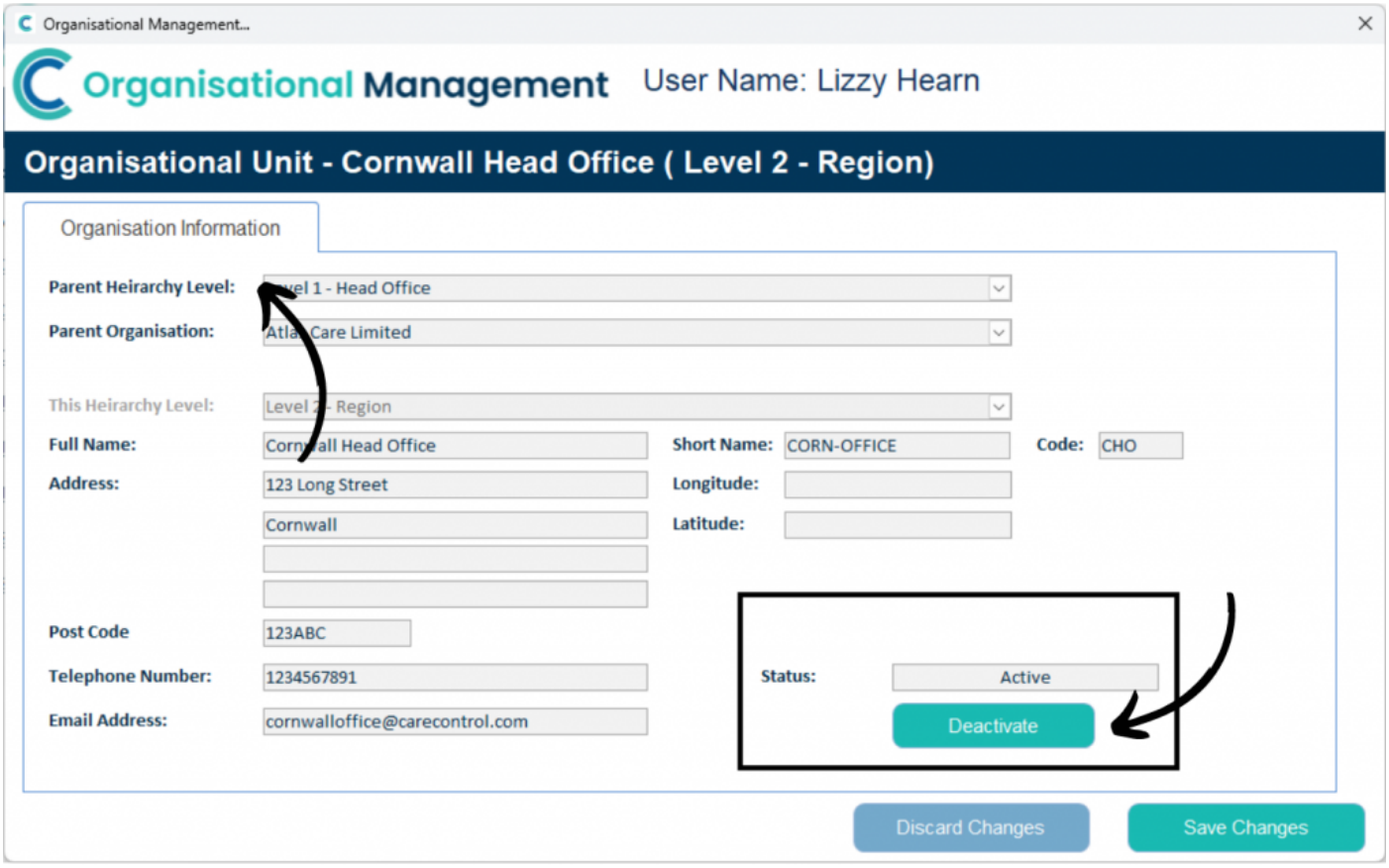
A new window will open. Here, all the details about the organisation can be seen, and edited, via the **Edit Organisation** button.

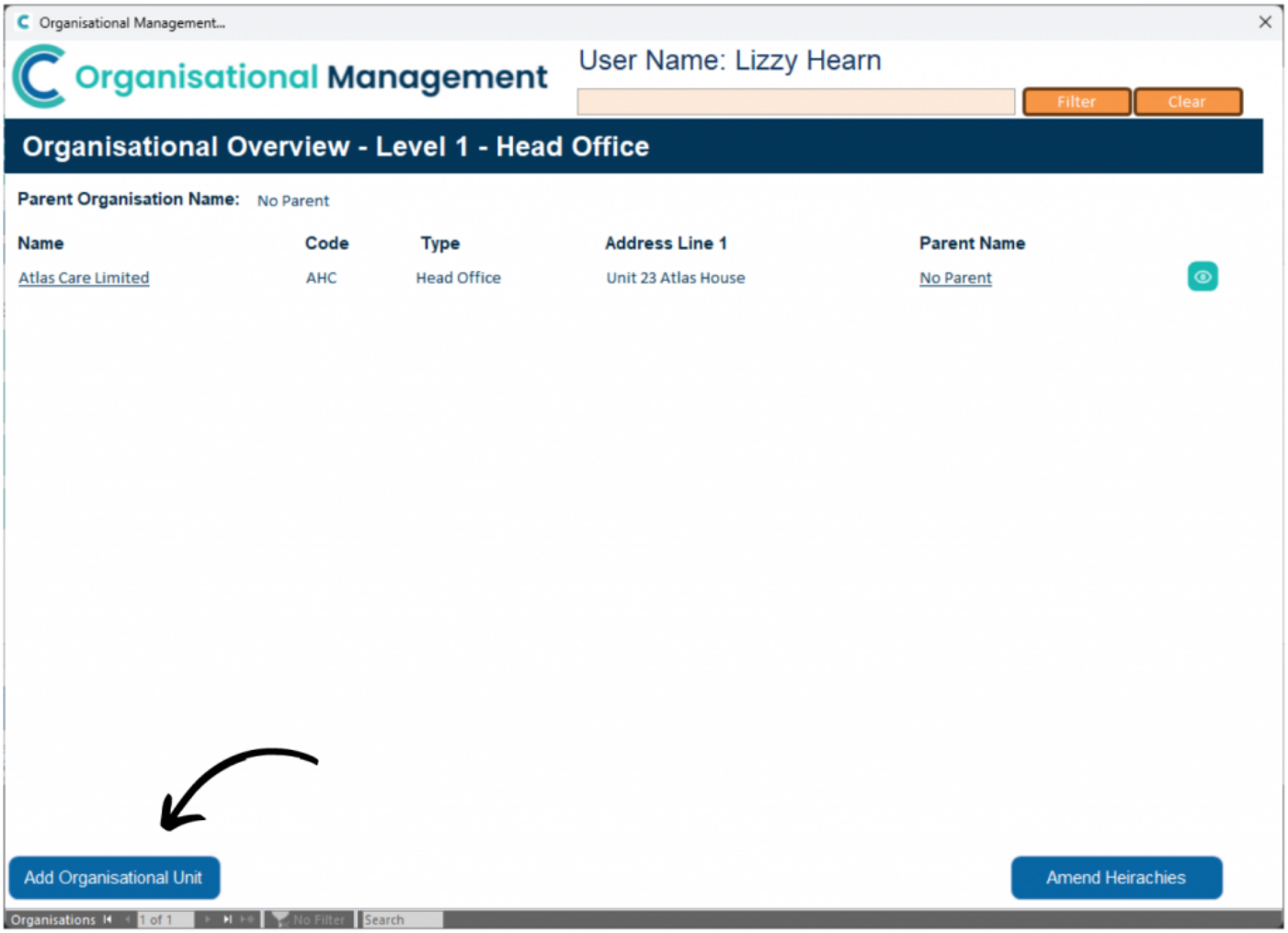



When editing, you can amend the details of the organisation unit.

You can also **Deactivate** the unit via the dedicated button.

After making any changes, you can **Discard** or **Save** them.






## 7

After returning to the **Manage Organisations** screen, we can add an organisation level via the **Add Organisational Unit** button.

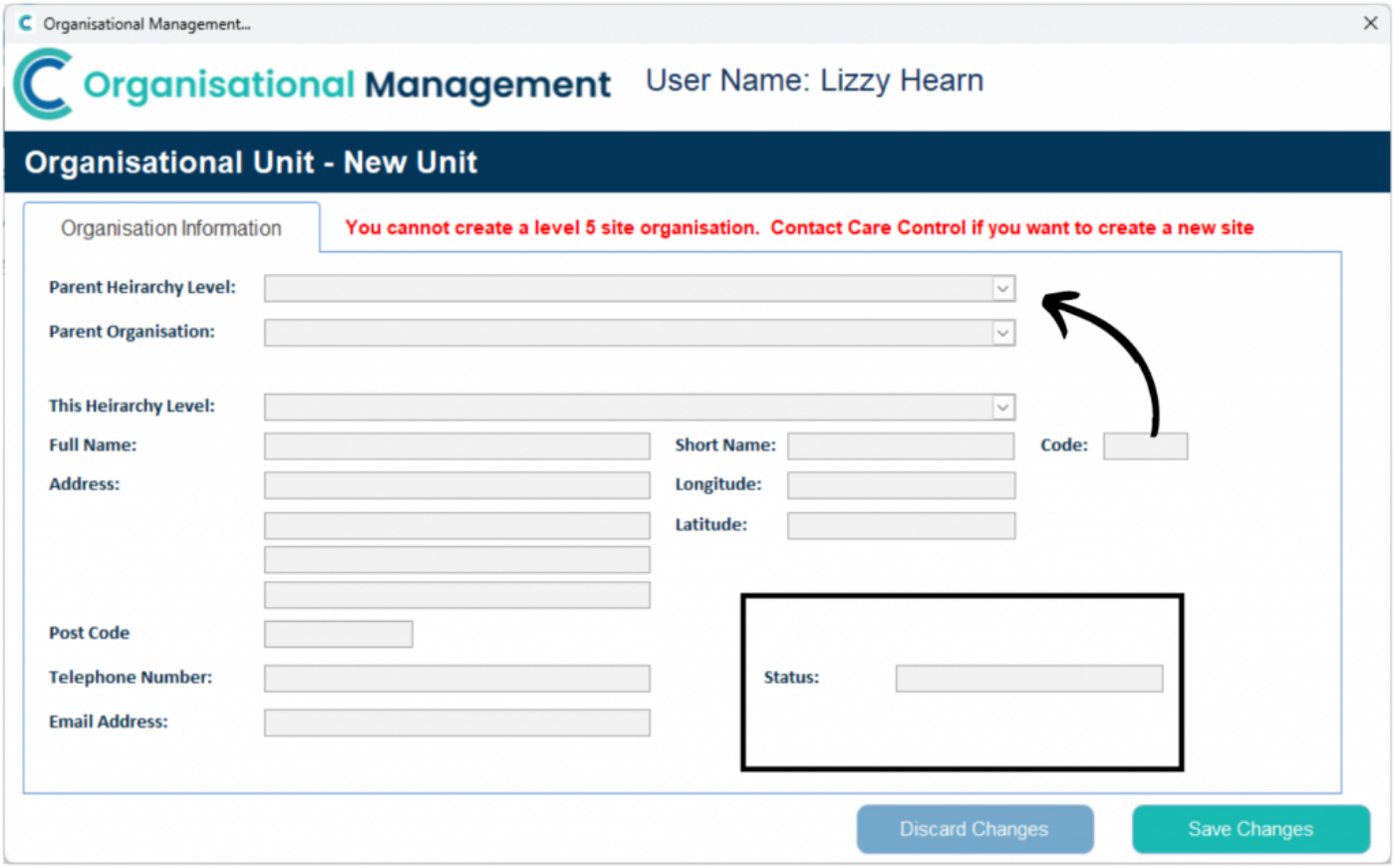
As an example, you may wish to add a regional office unit.

## 8

A blank form will open. Here you can begin entering the details of the new unit.

First, select the **Parent Level & Organisation**. This is the unit which is above the one you are making. For example, if creating a regional office unit, its parent would be the national office unit.

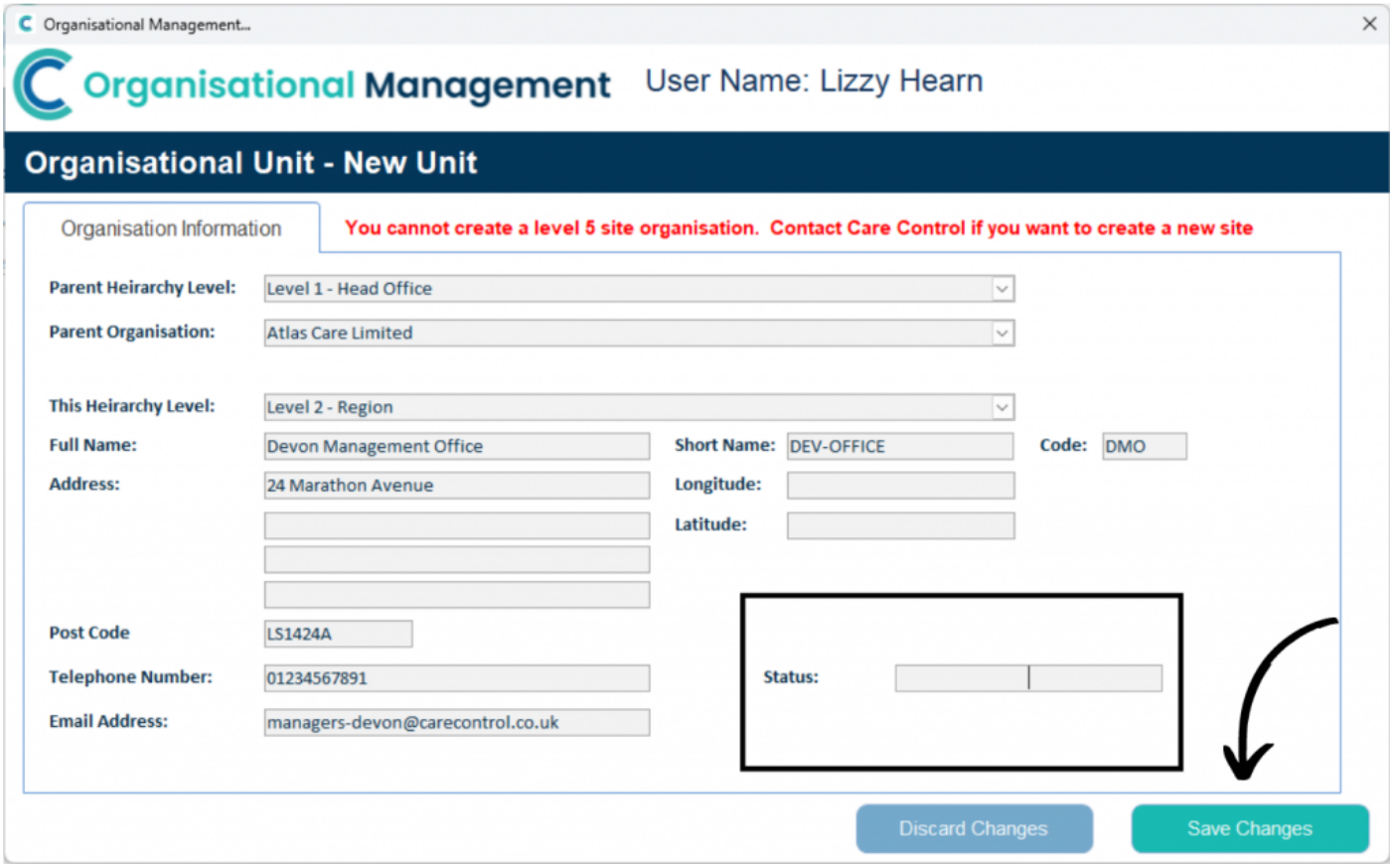
Next, enter the details about the unit, including its **Hierarchy Level**, **Name**, **Location & Contact Info** as well as a **Short Name** & **Code**.




There are also options to add **Longitude & Latitude** details for the unit – this is required to use the **Map View** on the **Organisational Service Status**. The guide linked below covers how to retrieve longitude and latitude data to paste into the dedicated boxes in the form.

CSG Geocoding – Manual Latitude and Longitude Entry – Care Control Learning Hub (cclearninghub.co.uk)

Follow steps 1 to 3 of the guide, then paste the details into the form in CC Windows.




## 9

Here is the same form populated with an example **Region Unit**.

Since its a regional office, its parent is the Head Office.

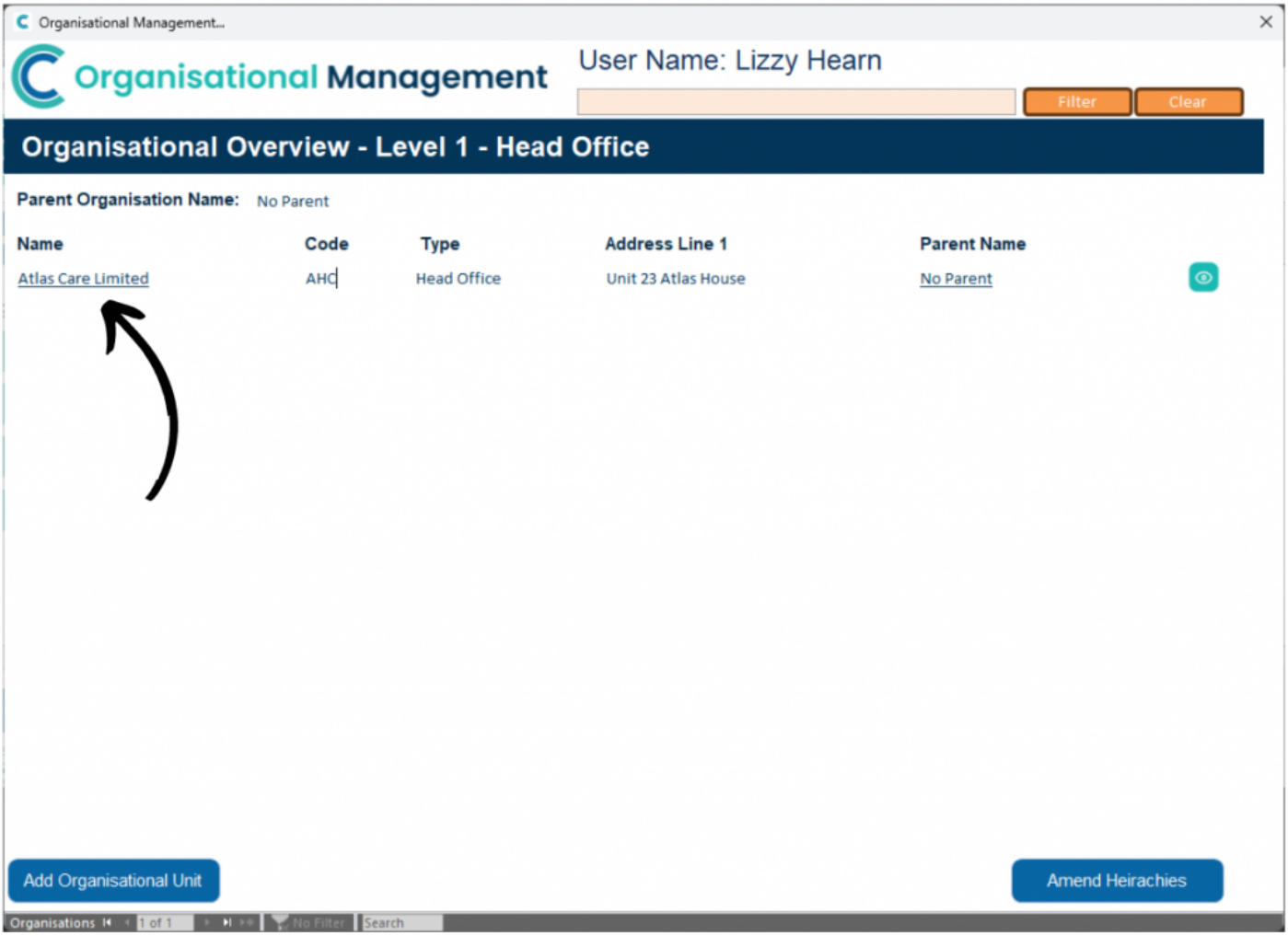
Its name is *Devon Management Office*, so for the **short name**, *DEV-OFFICE* has been used, and for the **code**, *DMO* has been entered.

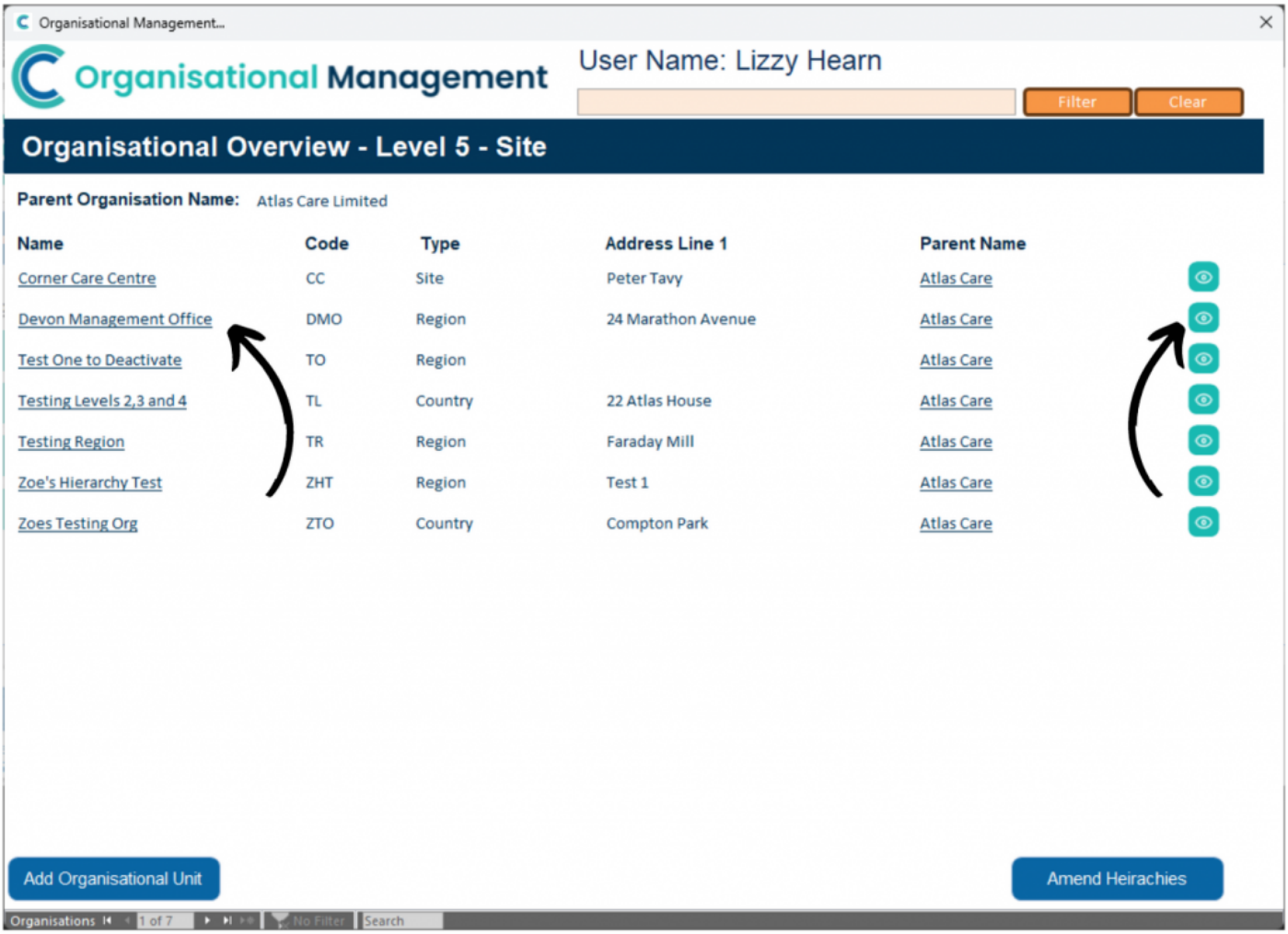
The **Status** box will auto-fill after pressing **Save Changes**.

## 10

After saving an closing the form, return to the **Manage Organisations** dashboard.

Click on the Head Office unit to view the units below it in the hierarchy.

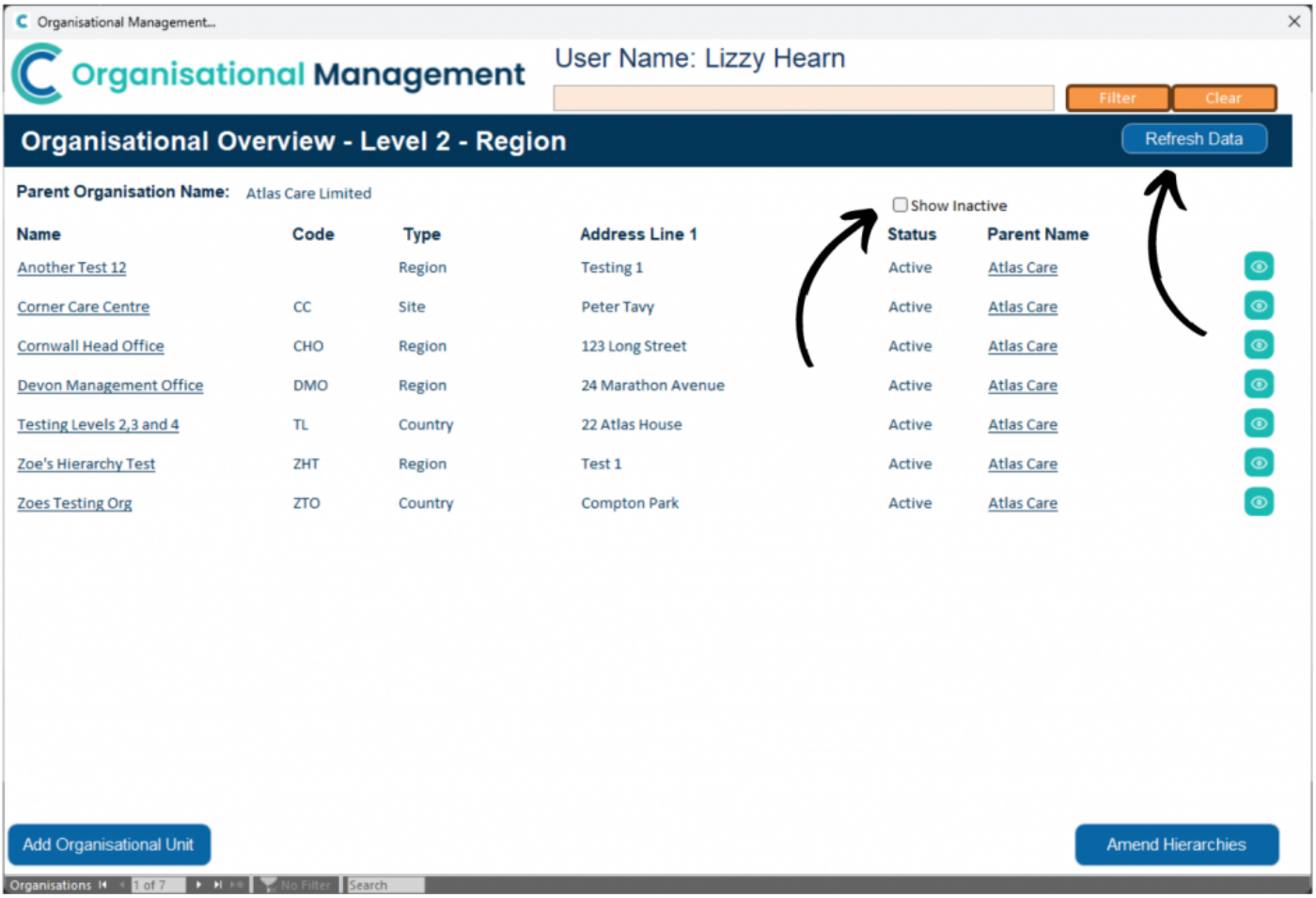

Organisational Management...
Organisational Management
User Name: Lizzy Hearn
Filter
Clear
Organisational Overview - Level 1 - Head Office
Parent Organisation Name: No Parent
Name
Code
Type
Address Line 1
Parent Name
Atlas Care Limited
AHO
Head Office
Unit 23 Atlas House
No Parent
Add Organisational Unit
Amend Heirachies
Organisations
1 of 1
No Filter
Search




## 11

We can now see the **Region Unit** created in step 9 of this guide, the *Devon Management Office.* Click on the **eye icon** to view further details about the unit.

Clicking on the name of the unit will show which (if any) units work beneath it in the hierarchy. For example, the sites which the *Devon Management Office* control would appear.



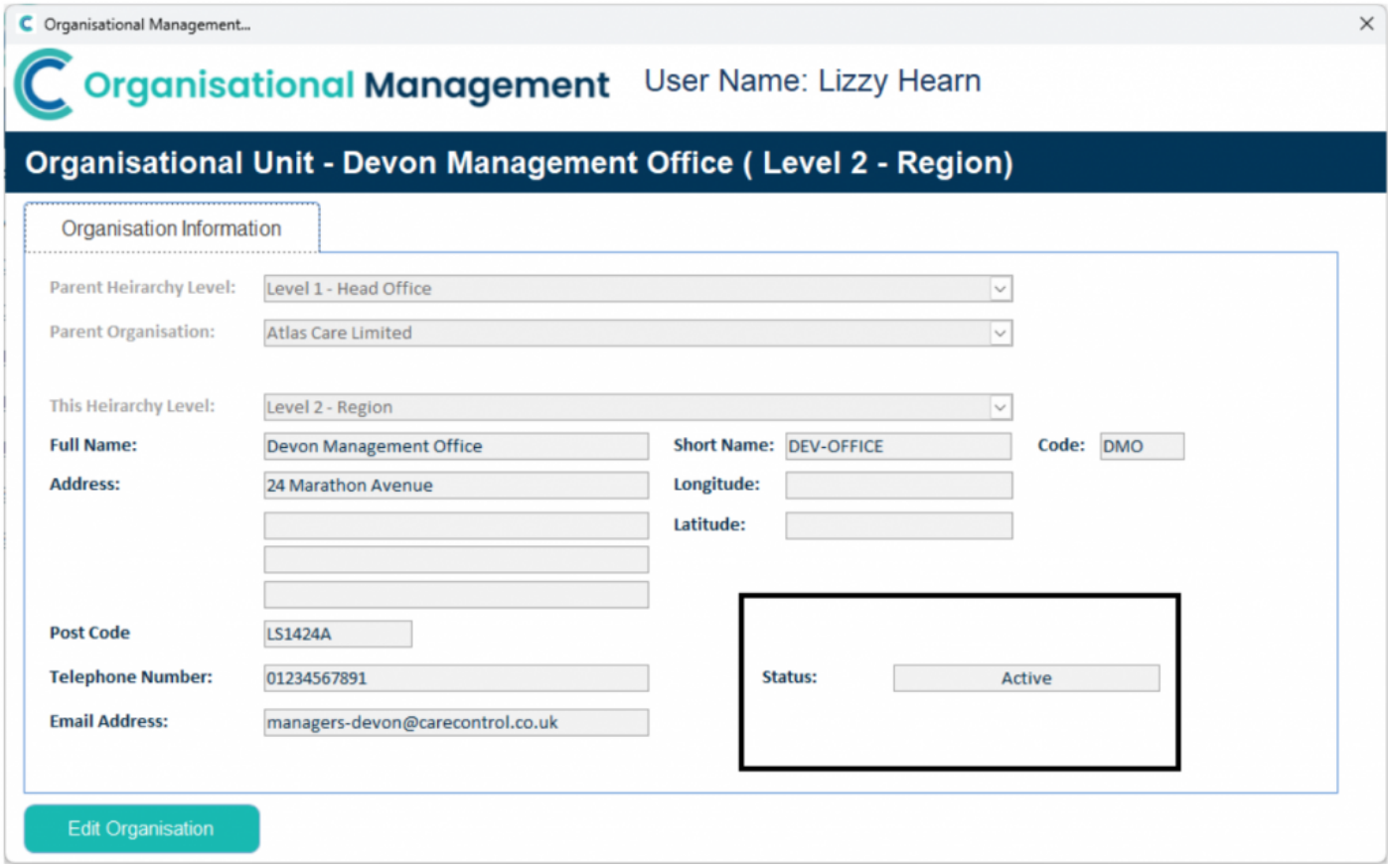

On this page, you can also toggle whether **inactive units** are shown via the tick box.

You can also **refresh** the **data** on the page if any changes have been made.

To go back to the **Level 1 – Head Office** view, simply press on the **Parent Name** which is underlined on the right hand side.

## 12

Selecting the **eye icon** in the previous step will open the details of the unit. Here, you can **Edit** the **Organisation** via the dedicated button.


Organisational Management...
Organisational Management
User Name: Lizzy Hearn
Organisational Unit - Devon Management Office ( Level 2 - Region)
Organisation Information
Parent Heirarchy Level:
Level 1 - Head Office
Parent Organisation:
Atlas Care Limited
This Heirarchy Level:
Level 2 - Region
Full Name:
Devon Management Office
Short Name:
DEV-OFFICE
Code:
DMO
Address:
24 Marathon Avenue
Longitude:
Latitude:
Post Code
LS1424A
Telephone Number:
01234567891
Email Address:
managers-devon@carecontrol.co.uk
Status:
Active
Edit Organisation