

Organization Level

Module Guide: Organization Level

Module Location

Settings > Organization Structure > Organization Level

Module Purpose

The **Organization Level** module serves as a central master data hub for creating, viewing, and managing the company's hierarchical organizational structure. This is where organizational units such as companies, divisions, departments, and sections are defined and arranged in a **tree structure** to reflect the chain of command and reporting relationships.

1. Main View (Organization Tree Structure)

The main page displays the company's entire organizational structure in a hierarchical tree that can be expanded and collapsed.

View Explanation

. Tree Structure:

- **Top Level:** Represents the parent company entity (e.g., PT. UNGGUL INDO MODERN SEJAHTERA).
- **Lower Levels:** Show the organizational units that fall under the entity above them, such as divisions or departments (e.g., `MANAGING DIRECTOR`, `PRODUCTION PLANNING`, `ACCOUNTING`).

• Action Buttons per Level:

- **Add Icon:** (Usually a icon or similar) to create a new organizational unit under the selected level.
- **Edit Icon:** (Usually a pencil icon) to open the detail page and modify the information of the selected organizational unit.
- **Delete Icon:** (Usually an icon) to delete an organizational unit (if it has no descendants or is not in use).

2. Organization Detail Page

This page is the form for editing the details of an existing organizational unit or creating a new one.

View Explanation

• Basic Information:

- **Organization Code & Organization Name:** The unique code and name of the organizational unit (e.g., department or division).
- **Organization Level:** A dropdown to place this unit under its parent unit, building the hierarchical relationship.
- **Status:** An "Active" checkbox to indicate if this organizational unit is still valid.

- **Form Action Buttons:**

- **Add Child:** A shortcut button to create a new organizational unit positioned directly under the one currently being viewed.
- **Change, Reset, Cancel, Delete:** Standard data management buttons.

- **Archive (Change History):**

- A table at the bottom that serves as an audit log. This table records all changes ever made to this organizational unit, including changes to its name, parent level, and the date of the change.

3. Steps to Build the Organizational Structure

- Starting from the Main View, click the **add icon** next to the top-level entity to create a new division.
- You will be directed to the **Organization Detail** page. Fill in the **Organization Code**, **Organization Name**, and ensure the parent **Organization Level** is correct.
- Click **Save** (or **Change**).
- To create a department under the division you just created, return to the Main View, find that division, and click the **add icon** next to it. Repeat this process until the entire organizational structure is formed.

4. Integrated Workflow & Business Process

- **Basis for CCPC:** The organizational structure created here is the foundation for creating **Cost Centers and Profit Centers** (CCPC). Each department or division defined here can be designated as a CCPC for cost accounting and budget monitoring purposes.
- **Approval Workflow:** The hierarchy defined here is often used to build automated approval workflows. For example, a purchase request from a staff member will be automatically routed to their department head for approval, based on the structure in this module.
- **Management Reporting:** This structure enables the creation of financial or operational reports that can be rolled up by department, by division, and up to the company level.

5. Tips & Important Notes

- The organizational structure is the backbone of many control and reporting processes in an ERP system. Design this structure carefully to match the company's actual operational and reporting structure.?
 - Use a logical numbering scheme (Organization Code) to facilitate identification and leave room for future growth.
 - The management of this module should be handled by the Human Resources (HR) department or the administrative team responsible for the organizational structure, in coordination with the finance team.
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