Organizational Structure Template

Module Guide: Organizational Structure Template

Module Location

Settings > Organization Structure > Organizational Structure Template

Module Purpose

The **Organizational Structure Template** module is a facility for designing and storing various "blueprints" or templates of organizational structures. This feature is highly useful for companies that frequently create new projects, open new branches, or have multiple types of business units with standard internal structures. Instead of building the structure of departments and positions from scratch each time, users can apply a pre-made template.?

1. Main View (Template List)

The main page displays a list of all organizational structure templates that have been created and saved in the system.

View Explanation

- **Create New Template**: A link to open the page or process for creating a new template.

- **Template List Table**:
  - **Design Name**: A unique and descriptive name for each template (e.g., "Branch Office Structure Type A," "Construction Project Team Structure").
  - **Date Created**: The date the template was first created.
  - **Last Change**: The date the template was last modified.
  - **Status**: Indicates the status of the template (e.g., Draft, Active, Inactive).
- Currently, the table shows "NO DATA," which means no templates have been created yet.

2. Steps to Create an Organizational Structure Template

Although the detail page is not shown, the workflow can be summarized as follows:

- **Create New Template**: Click the **Create New Template** link.
- **Name the Template**: The user will be prompted to provide a clear name for the template.
- **Design the Structure**: The system will likely open an interface similar to the **Organization Level** and **Position** modules, where the user can build the hierarchy of departments and job titles visually within the scope of this template.

- **Save the Template**: After the structure is fully designed, the user will save the entire design as a single template.

3. Integrated Workflow & Business Process

- **Standardization and Efficiency**: The primary function of this module is efficiency. When the company plans to open a new branch office, the HR manager does not need to create the structure of departments (Sales, Operations, Finance) and the positions under them one by one. By simply applying the "Branch Office Template," the entire structural framework is created automatically.?

- **Consistency**: Using templates ensures that all units of the same type (e.g., all factories or all projects) have a consistent structure of job titles and departments. This facilitates performance comparison and the uniform application of policies.?

- **Foundation for Rapid Projects**: In project-based industries, these templates enable rapid team mobilization. When a new project is won, a "Project Team Template" can be immediately applied to create all the necessary positions, from Project Manager to Field Engineer.

4. Tips & Important Notes

- Create templates for every type of recurring structure in your company (e.g., templates for factories, warehouses, sales offices, project teams).

- This template only includes the framework of **Organization Levels** and **Positions**, not the people or employees who fill them. The process of assigning employees to these positions is still done separately.

- The management of this module should ideally be handled by the organizational development team within the HR department or a central administration team responsible for business process standardization.

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