

CORES™

Quick Reference Guide

Manage Organizations

Overview

This quick reference guide outlines several key procedures for managing organizations, such as creating and editing them, managing access levels, managing members, and more. Note that, in your system, a *responder* may be referred to as a *volunteer* or a *user*.

Organization Terms

There are several terms to keep in mind as you work with organizations.

Organization Hierarchy – Structure of organizations, consisting of top-level organizations and levels of sub-organizations under each.

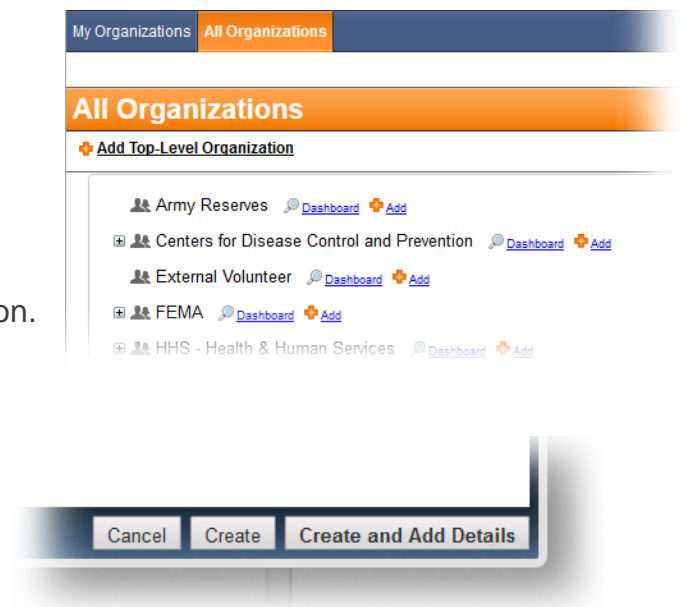
Top-level Organizations – Entities at the topmost level that have the greatest authority. Each top-level organization can be a parent to sub-organizations.

Sub-organization – An entity that is a child to another organization. The parent may be a top-level organization or another sub-organization.

Access Levels – Permission sets that determine the tasks responders can perform within the organization. The default level is automatically assigned to a new member when they are added to or accepted into an organization.

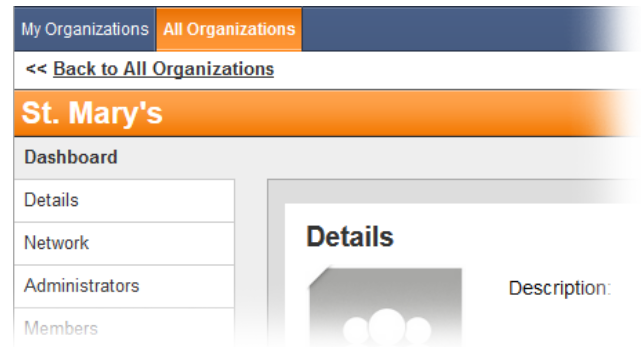
To Create an Organization

1. Go to **Organizations: All Organizations**.
2. Do one of the following:
 - Click **Add Top-Level Organization** to create a top-level organization.
 - Locate the parent organization and click **Add** next to it to create a sub-organization.
3. Enter a name.
4. Do one of the following:
 - Click **Create**.
 - Click **Create and Add Details**, enter details, and click **Save**.



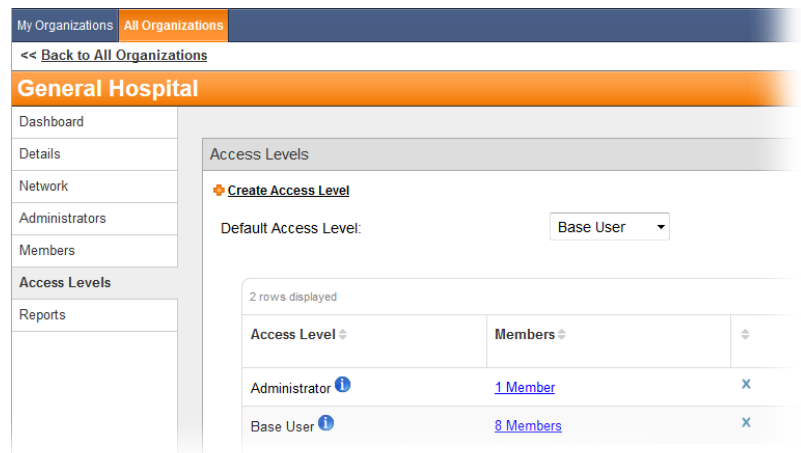
To Edit an Organization's Details

1. Go to **Organizations: All Organizations**.
2. Click **Dashboard** next to the appropriate organization.
3. Click **Details** on the left.
4. Click **Edit** at the top of the page.
5. Edit the information.
6. Click **Save**.



To Create Access Levels

1. Go to **Organizations: All Organizations**.
2. Locate the organization and click its **Dashboard** link.
3. Click **Access Levels** on the left.
4. Click **Create Access Level**.
5. Enter the appropriate information.
6. Click **Save**.



To Set a Default Access Level

1. Go to **Organizations: All Organizations**.
2. Locate the organization and click its **Dashboard** link.
3. Click **Access Levels** on the left.
4. In **Default Access Level**, select the appropriate option.

To Edit an Access Level

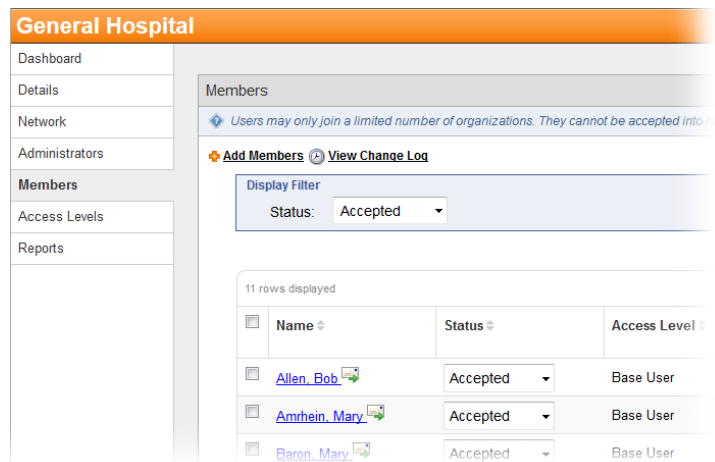
1. Go to **Organizations: All Organizations**.
2. Locate the organization and click its **Dashboard** link.
3. Click **Access Levels** on the left.
4. Click the info icon **i** next to the appropriate access level.
5. Click **Edit** in the upper left corner.
6. Edit the information.
7. Click **Save**.

Membership Management

This section outlines key procedures for managing organization membership.

To Add Members

1. Go to **Organizations: All Organizations**.
2. Locate the organization and click its **Dashboard** link.
3. Click **Members** on the left.
4. Click **Add Members**.
5. In the *Search Center* window, enter a name and click **Search**.
6. Select the check box next to each individual you want to add as a member to this organization.
7. Click **Add Responders**.



*Tip: Any individuals you add to an organization automatically have the **Accepted** status.*

Membership Statuses

The following table lists the available membership statuses and defines each:

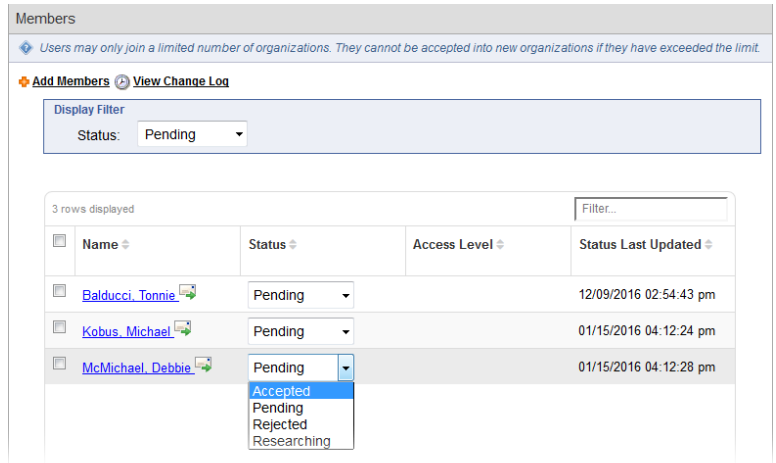
Status	Definition
Accepted	The responder has been accepted and can view organization details and contact information.
Pending	The administrator has not taken any action on the responder's request.
Rejected	The administrator denied the responder's request to be a member of the organization.
Researching	The administrator is performing research to determine whether the user's organization affiliation is authentic.

To Change Membership Status

1. Go to **Organizations: All Organizations**.
2. Locate the organization and click its **Dashboard** link.
3. Click **Members** on the left.
4. Locate the members you want to change.

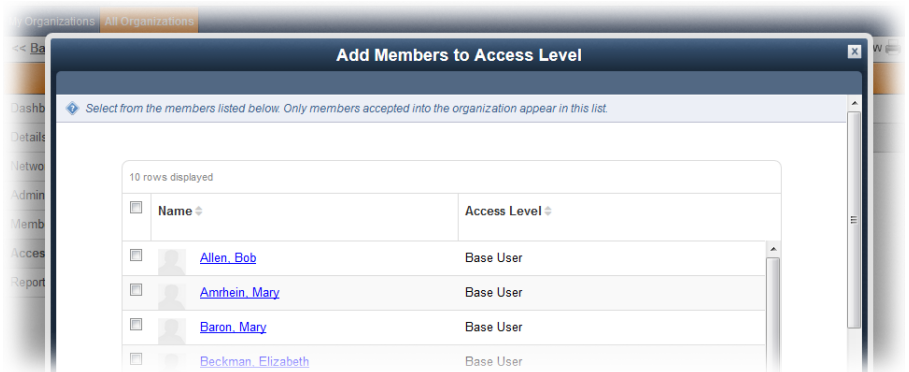
*Tip: Use the **Display Filter** at the top of the page to locate the appropriate members.*

5. In the **Status** column, select the appropriate status for each member.



To Assign Members to Access Levels

1. Go to **Organizations: All Organizations**.
2. Locate the organization and click its **Dashboard** link.
3. Click **Access Levels** on the left.
4. Click the numbered link in the **Members** column for the appropriate level.
5. Click **Add Members**.
6. In the *Add Members to Access Level* window, select the check box next to the appropriate individuals.
7. Click **Add Members**.



For more information, contact your Customer Success Manager or the support desk at 888-735-9559; in the support phone system, press 1 for Client Application Support and then 7 for Collaborative Fusion.