

## CORES® Quick Reference Guide

# Organization Management

## Overview

Key aspects of organization management include creating and editing organizations, defining organization access levels, and identifying responders or volunteers that are members.

**Note:** Responders and volunteers are both acceptable terms for the people who respond to and volunteer for incidents. Although your solution may refer to them as volunteers, responders is used throughout this document for consistency.

## Keywords

Here are a few keywords to keep in mind as you manage organizations in your solution.

- **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

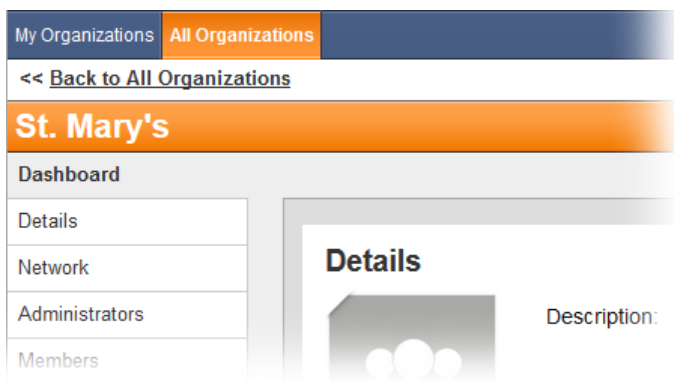
1. Go to **Organizations: All Organizations**.



2. Take one of these actions.
  - Click **Add Top-Level Organization** to create a top-level organization.
  - Locate the parent organization and, on that row, click **Add** to create a sub-organization.
3. Enter the name of the organization.
4. On the lower right, take one of these actions.
  - Click **Create**.
  - Click **Create and Add Details**, enter the details, and then click **Save**.

### To Edit Organization Details

1. Go to **Organizations: All Organizations**.
2. Locate the organization and, on that row, click **Dashboard**.
3. On the left, click **Details**.

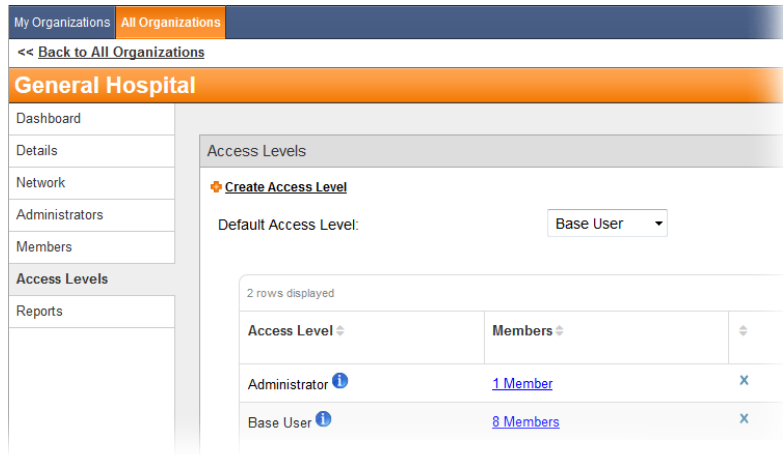


4. Click **Edit**.
5. Update the organization details.
6. Click **Save**.

### To Create Access Levels

1. Go to **Organizations: All Organizations**.
2. Locate the organization and, on that row, click **Dashboard**.
3. On the left, click **Access Levels**.

4. Click **Create Access Level**.




5. Enter the required information.

6. Click **Save**.

### To Set a Default Access Level

1. Go to **Organizations: All Organizations**.
2. Locate the organization and, on that row, click **Dashboard**.
3. On the left, click **Access Levels**.
4. In the **Default Access Level** list, click the level you want assigned by default.

### To Edit an Access Level

1. Go to **Organizations: All Organizations**.
2. Locate the organization and, on that row, click **Dashboard**.
3. On the left, click **Access Levels**.
4. Locate the access level and, on that row, click the info icon . The info window opens.
5. In the upper left, click **Edit**.
6. Update the information.
7. Click **Save**.

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