Setting up Organization Levels and Structure

Organization Levels

To use Organizations, you first need to define your **Organization Levels**. These describe the behaviour of different levels of your hierarchy (i.e. whether Clinics, for example, can have cases assigned to them).

To setup Organization Levels, go to Users tab and choose Organization Levels from the menu.

You can use the page to define the levels in your organization hierarchy. Specify the following information for each organization level:

- **Organization Level**: The name of the organization level (ex. District or Clinic)
- **Parent Level**: The parent level for the organization level (ex. the parent level of Clinic is District). For the top level of your organization hierarchy, set the Parent Type to **-top level-**
- **Owns Cases**: This controls whether locations of this type are able to have cases created and assigned to them. For example, you may have Health Workers that own cases, but districts do not. If there are multiple workers assigned to a single location at this level they will share cases if this box is checked.
- **View Child Data**: For an organization level that has child organization levels, this controls whether a location at that level can view cases assigned to child locations. For example, you may want to have Clinics view cases owned by each child Health Worker

Here's a simple example of the organization levels for a project:

<table>
<thead>
<tr>
<th>Location Type</th>
<th>Parent Type</th>
<th>Owns Cases</th>
<th>View Child Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>District</td>
<td>-top level-</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clinic</td>
<td>District</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supervisor</td>
<td>Clinic</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CHW</td>
<td>Supervisor</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Organization Structure

Once you've configured your Organization Levels, you can create the the Organization Structure for your project. The Organization Structure is comprised of **locations** that can represent a geographical hierarchy (i.e. a state or a district), a real world location (i.e. a Clinic) or just a programmatic point in the hierarchy (i.e. a Supervisor and Health Workers)

Click on the Users tab and choose Organization Structure.
1. Click on the "New location at top level" to create your first location

2. Once you've created a location, you can click New Child Location, or go back to the Locations page to create more locations.

3. When viewing the location tree, you can use the + button to expand a location and view its children. Once expanded, there will also be a button to create more child locations for that location.

4. You can also edit a location using the Edit button next to it in the tree. When editing a location, you can set the following information:
   a. Name and Organization Level
   b. Coordinates: This is useful for map-based reports if using Organizations in CommCare Supply project
   c. Parent: Change or move the location to a different parent. Currently only locations with no children can be moved.
d. Site Code: A unique identifier for the location that can be used when assigning cases to the location via Excel or assigning lookup table rows to the location

Assigning Mobile Workers to a Location

To use the Organizations feature in your applications, you first need to assign mobile workers to the location.

There are two ways to assign mobile workers to a location:

1. You can choose the user from the mobile worker list, and then use the Locations tab to choose their location. Each user can be assigned to more than one location. Set the Primary Location to represent that user's main working location. This primary location will then appear in the bulk mobile worker download/upload, and be displayed in the app when accessing the user's information.
1. Alternatively, you can use the Locations page to edit the location. Choose Edit on the location from the Locations page, then chose the Users tab to assign mobile workers to that location.

2. Alternatively, you can use the Locations page to edit the location. Choose Edit on the location from the Locations page, then chose the Users tab to assign mobile workers to that location.