

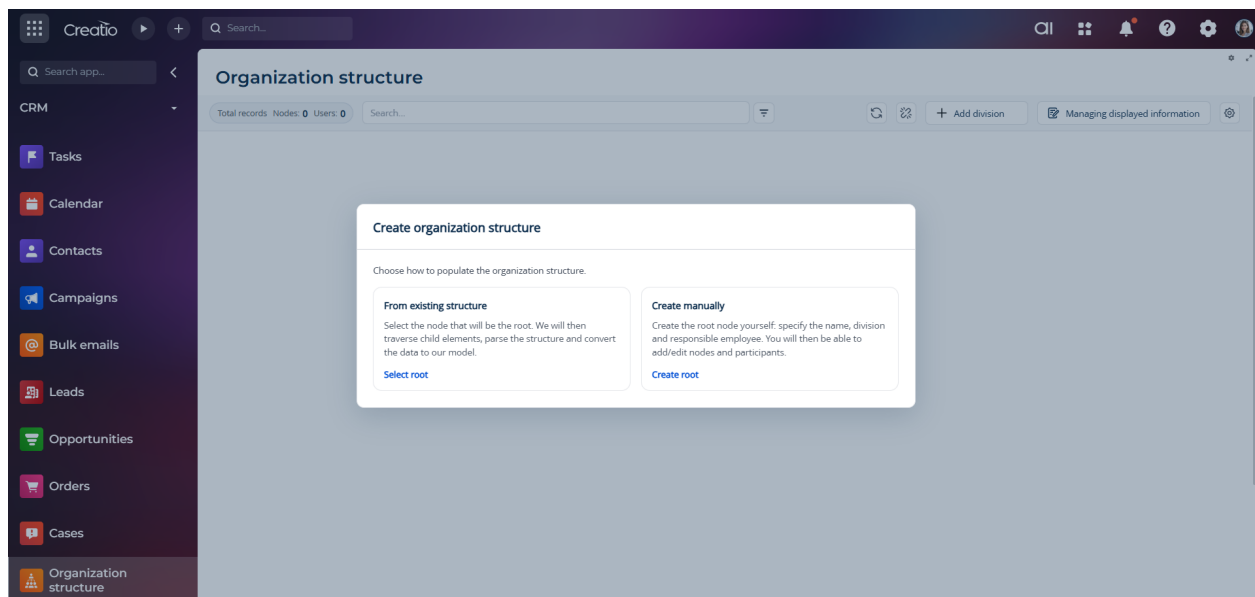
Installing the App from Creatio Marketplace

The application follows the standard installation procedure. To install the app, please refer to the official [Creatio Marketplace documentation](#).

Getting Started with OrgStructure Pro

Once the application is installed, navigate to the **Organization Structure** section.

The app supports a hybrid model, allowing you to either build a hierarchy from scratch or synchronize it with your existing organizational roles.

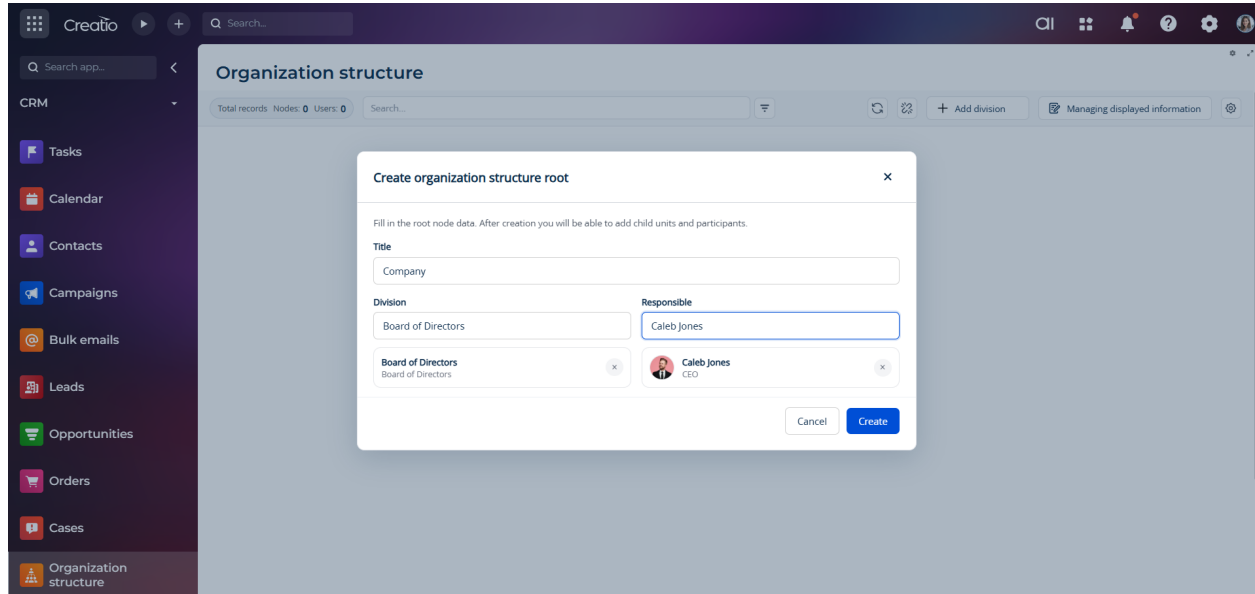


Building a Structure from Scratch

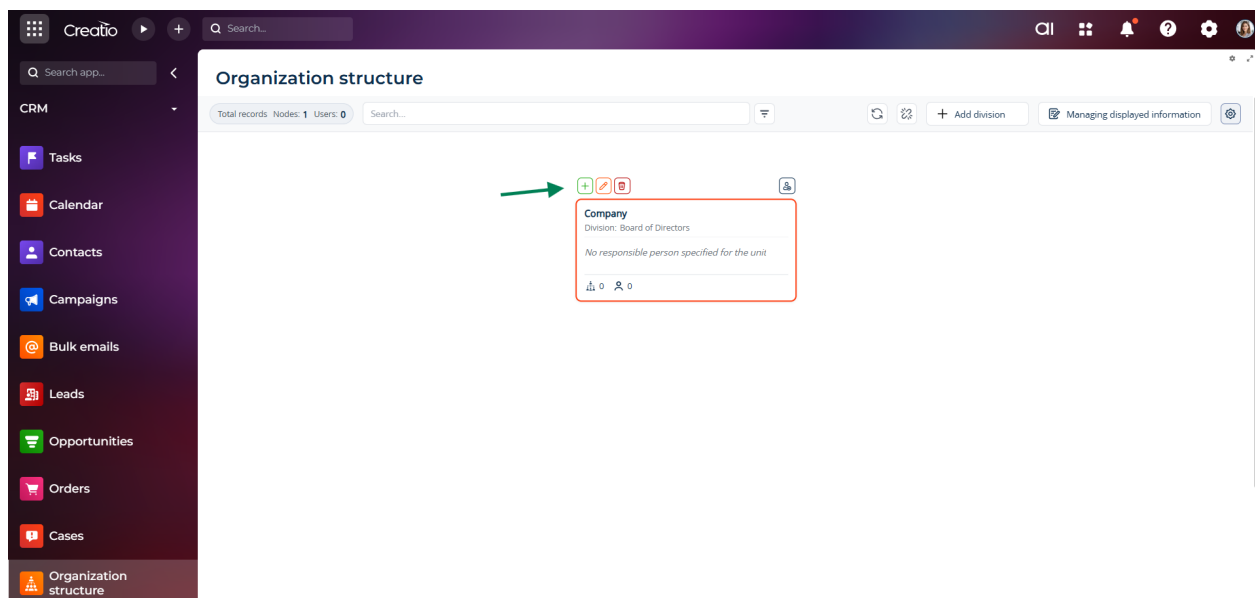
Use this approach if you need to build a hierarchy that differs from your existing system roles:

Creating a Root Unit:

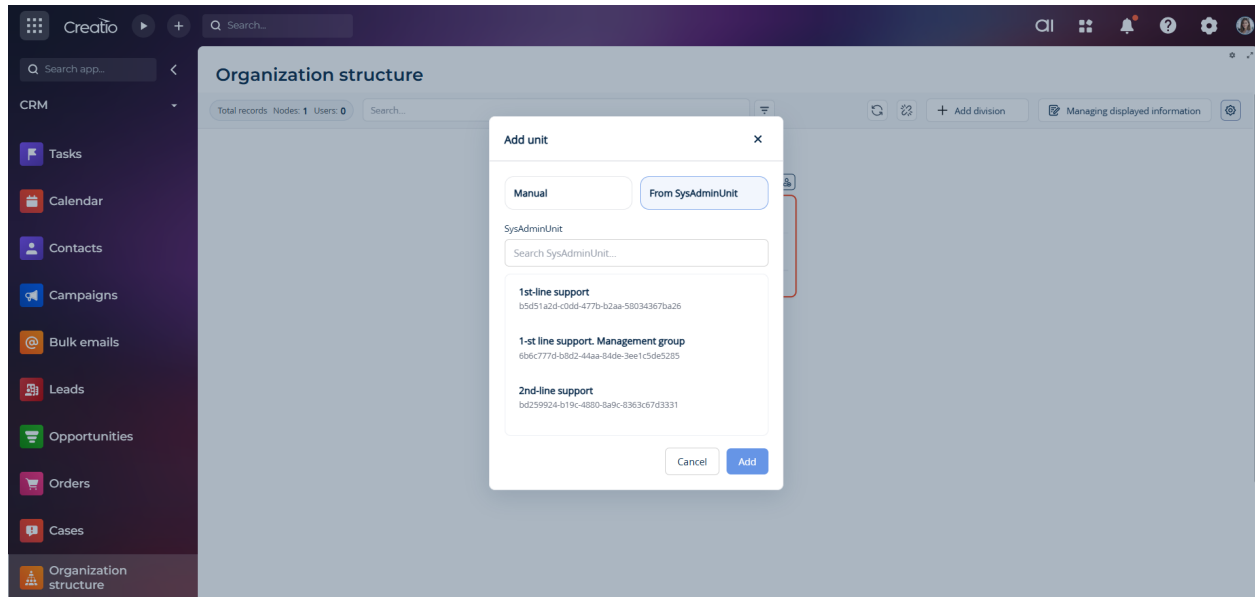
Specify the **Name**, **Owner (Manager)**, and **Division Type**.



Creating Child Units: To add a subordinate department, click the "+" icon directly on the parent node or use the **Edit** menu. The **Parent Node** field will be populated automatically.

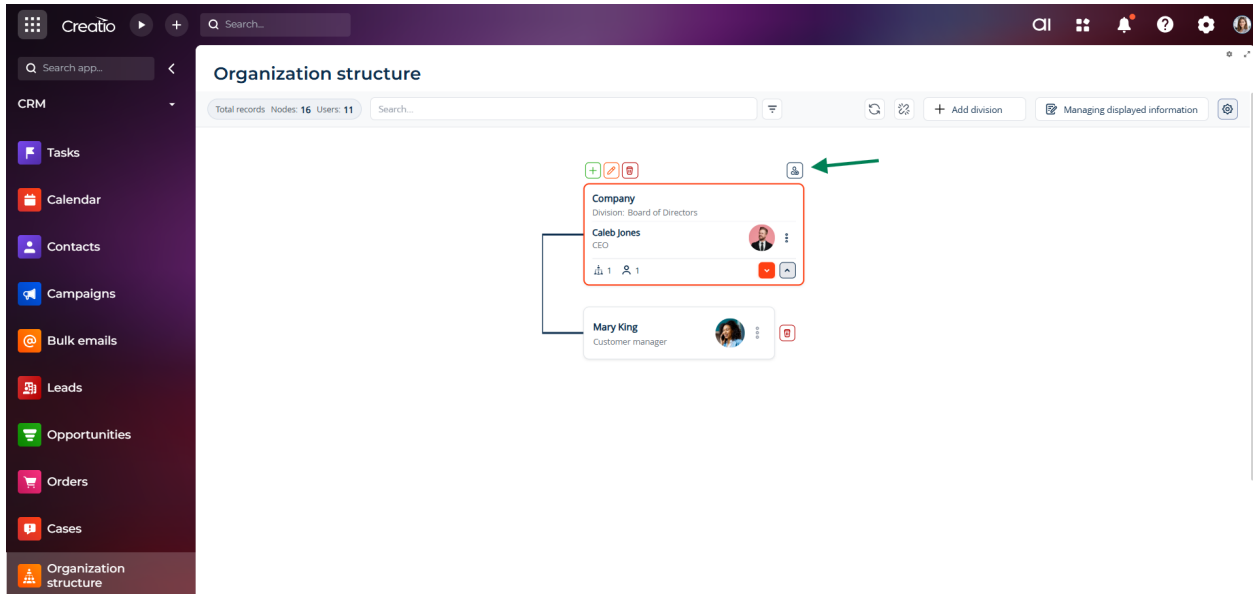


When adding child units, select the preferred method: **Manually** or **From SysAdminUnit**.



Adding Employees:

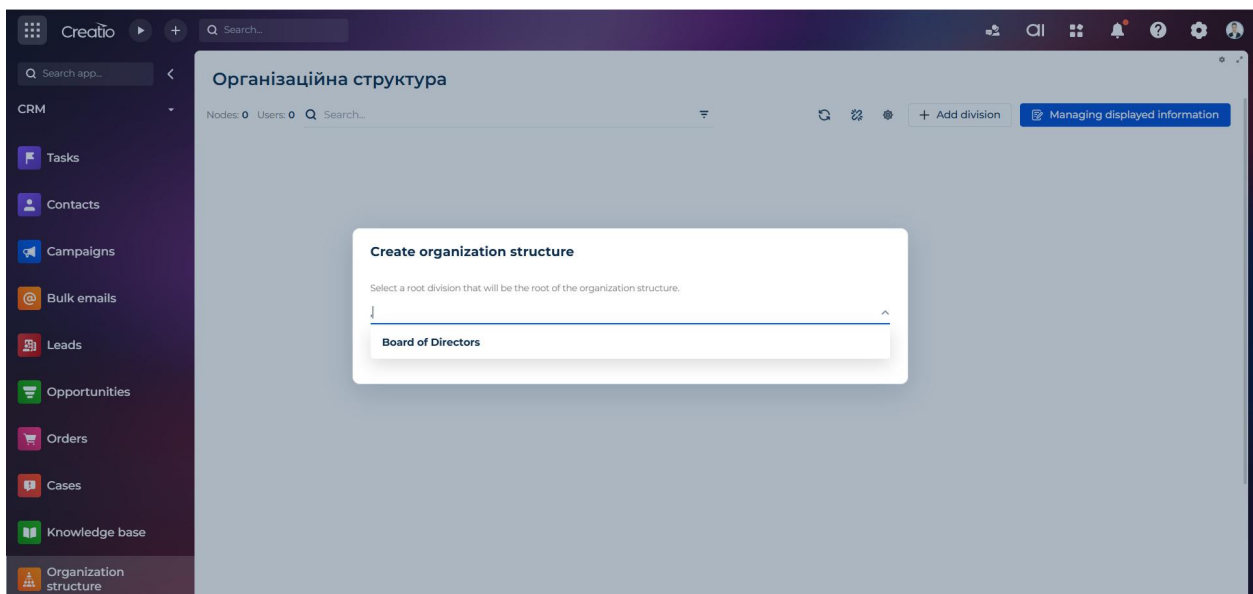
In the node edit window, navigate to the **Employees** tab. Add users from the **Employee** or **Contact** registry, depending on which section contains the complete user profile. These users will now be displayed within this unit when it is expanded.



Creating an org structure from divisions.

Select the root division.

No manual input is needed; simply select a division that has no parent. Once selected, the app will automatically generate and draw the organizational structure.



Visual and dynamic elements

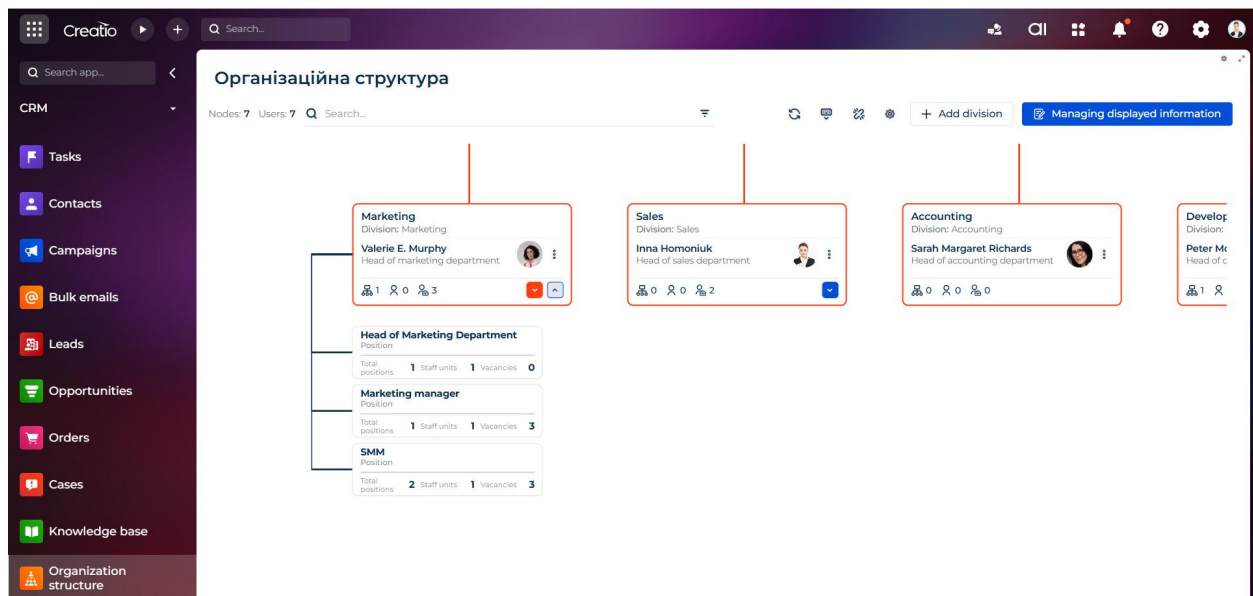
Working with job titles

Each node has a special marker showing the number of job titles.

Blue button: expands the list of job titles within the division.

Job title card: displays the title name, total headcount, and the number of occupied and vacant positions.

Display toggle: allows you to show either the employee or their job title on the chart (simultaneous display is not possible).



Editing connections

Moving elements

Changing connections directly on the canvas (drag-and-drop) is disabled.

Moving a division: open the divisions lookup, find the one you need, and change its parent division.

Moving a job title: open the "Employee job titles" lookup and change the division value.

Deletion: delete the division directly from the lookup, and it will disappear from the organizational structure.

Structure actualization

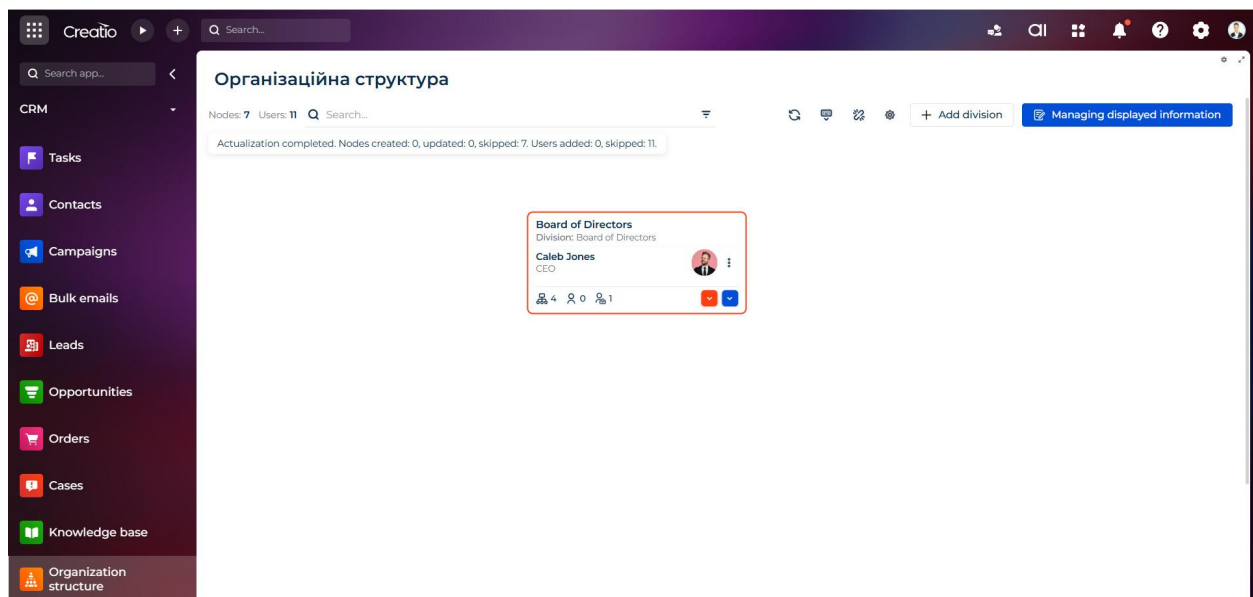
Data update

This feature helps avoid manual data entry after importing divisions or employees.

Running the actualization: the app will process the divisions, create the necessary nodes in the correct hierarchy, and link the job titles.

Modal window: after the process is complete, a report appears showing the number of created, updated, and skipped nodes, as well as added users.

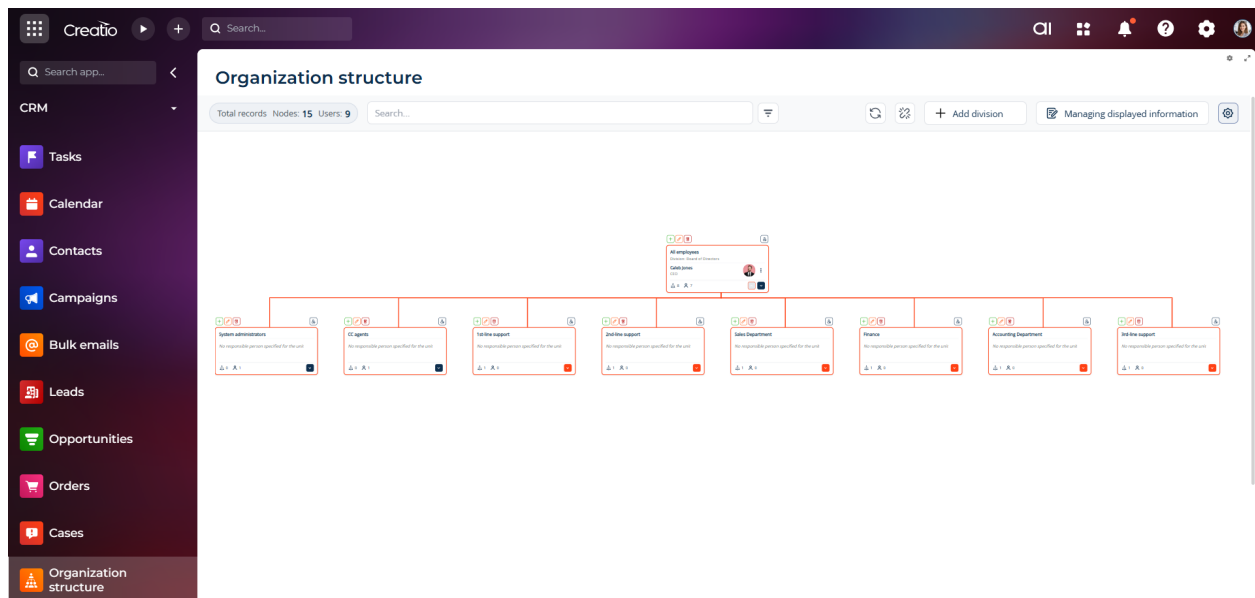
Condition for operation: actualization will only work if the structure was originally created from divisions from the very beginning.



Creating the Org Structure from Existing Data

Select the **Parent Unit**.

No manual data entry is required, as the application automatically retrieves and populates the necessary information. Once saved, the system will automatically render your existing organizational structure.



Interface and Navigation

Working with the Canvas

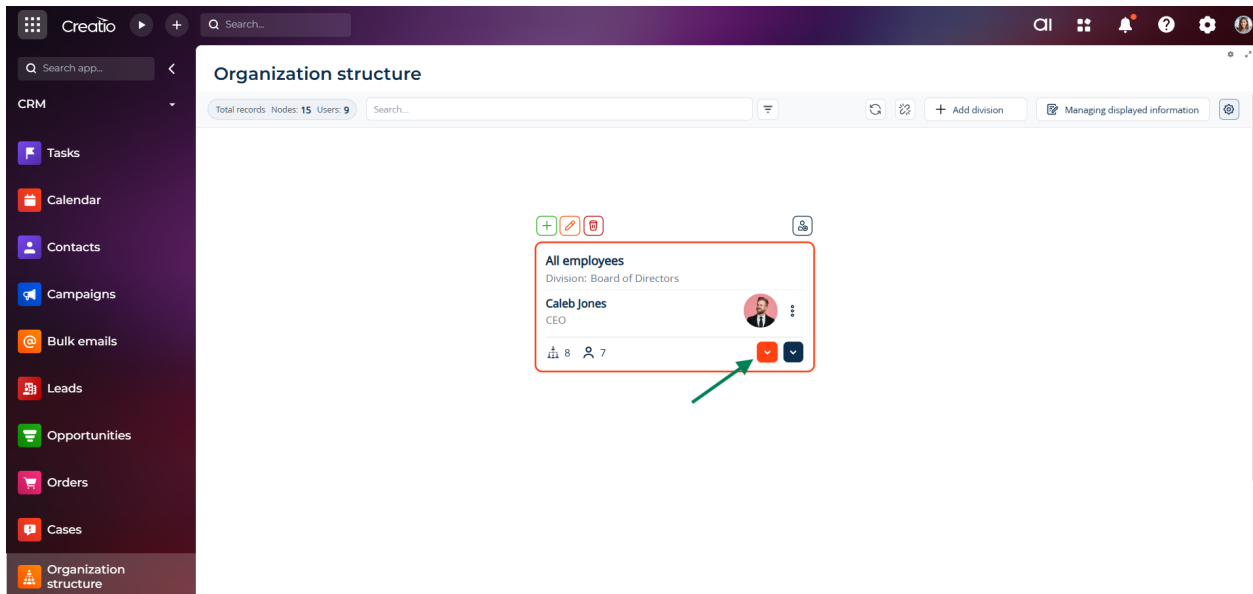
The application is implemented as an infinite interactive canvas.

- **Panning:** Click and hold the left mouse button on any empty space and drag to move the canvas. Individual nodes are anchored to maintain layout integrity.
- **Zooming:** Use the mouse wheel (scroll) to zoom in on specific cards or zoom out for a bird's-eye view of the entire tree

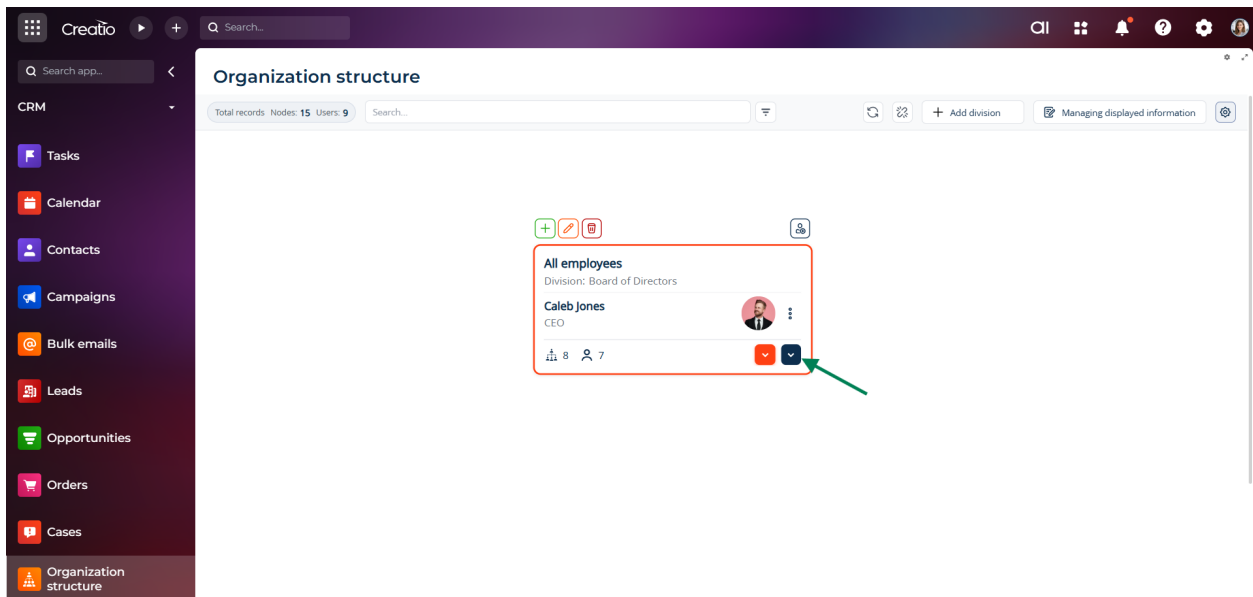
Dynamic Elements

Each node features two expansion options:

- **Orange arrow (bottom of the node)** — expands subordinate units.



Blue arrow (side of the node) — expands the employee list.



Performance (Lazy Loading)

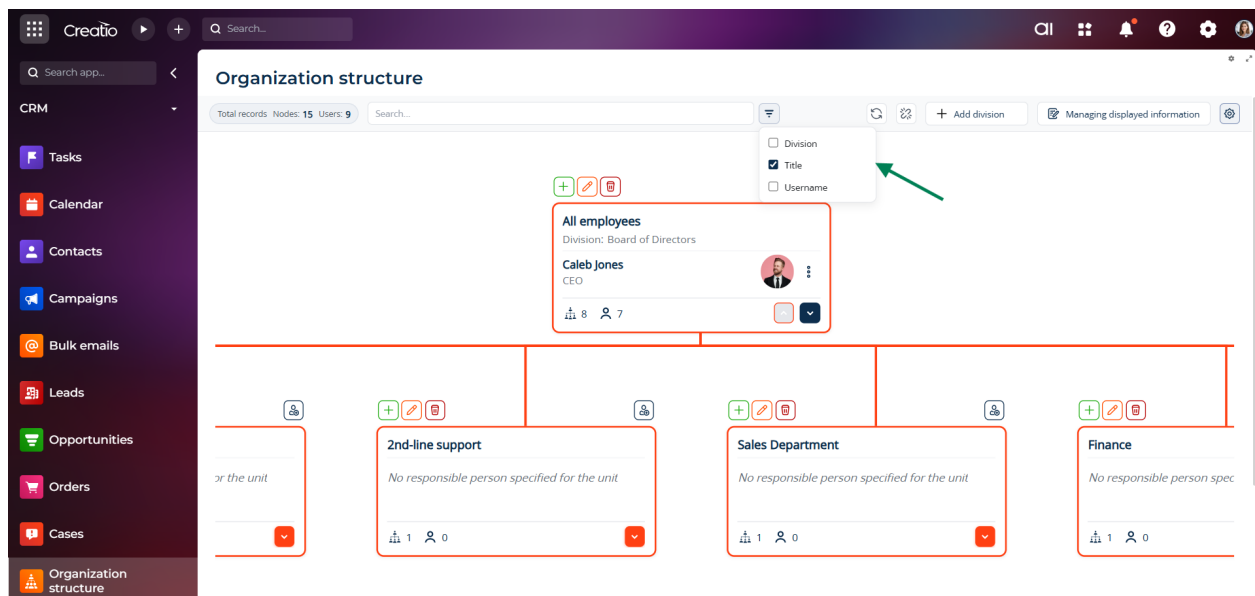
To handle large datasets efficiently, the application utilizes pagination. When a department contains a high volume of employees, click the Load more button to display the next set of

contacts. This optimization ensures high performance and system responsiveness, even when managing 1,000+ records.

Search and Filtering

The system features advanced search functionality across three key parameters:

- **By User Name:** The system locates the individual and automatically expands the complete hierarchical path leading to their position within the structure.
- **By Node Name:** Quickly focuses and navigates the view to a specific department or unit.
- **By Division:** Filters the tree based on the selected organizational level (e.g., displaying only "Departments").



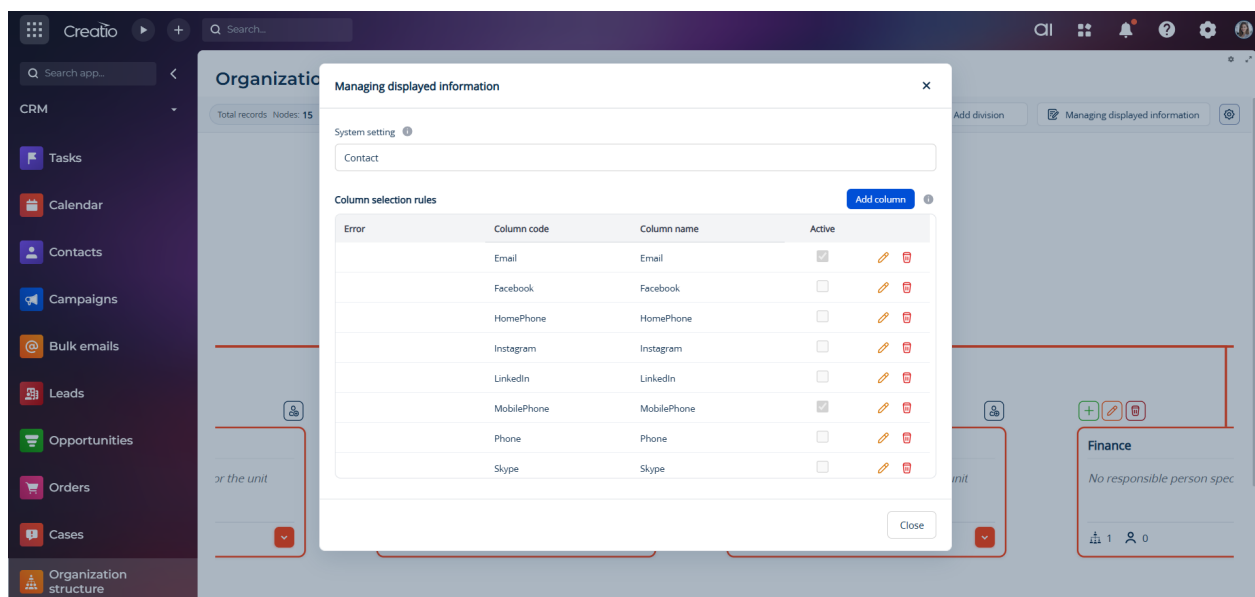
Display Settings (Administration)

You can customize the information displayed on employee cards within the organizational tree.

To do so, access the **Display Information Management** module.

Add or remove the fields you wish to display (e.g., **Phone**, **Email**, **Job Title**, **Telegram**).

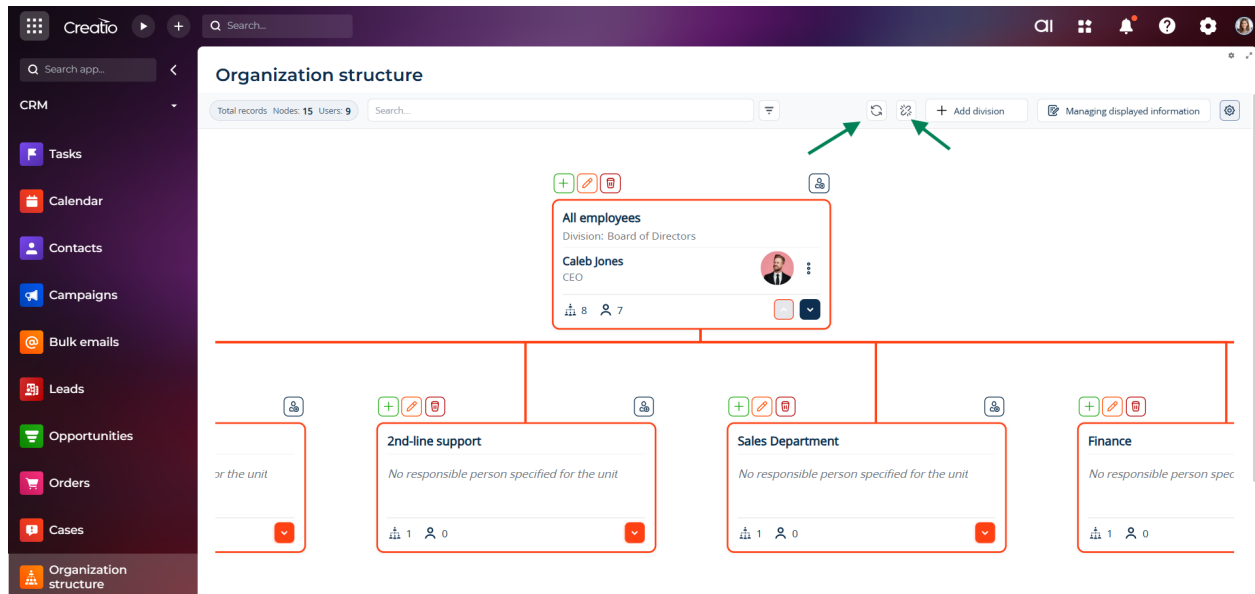
Data can be retrieved from either the **Contact** or **Employee** object. All changes take effect immediately across all cards.



Cache Management and Updates

To ensure optimal performance, organizational structure data is cached.

Click the **Reset Cache** and **Refresh** buttons to update the view with the latest data.

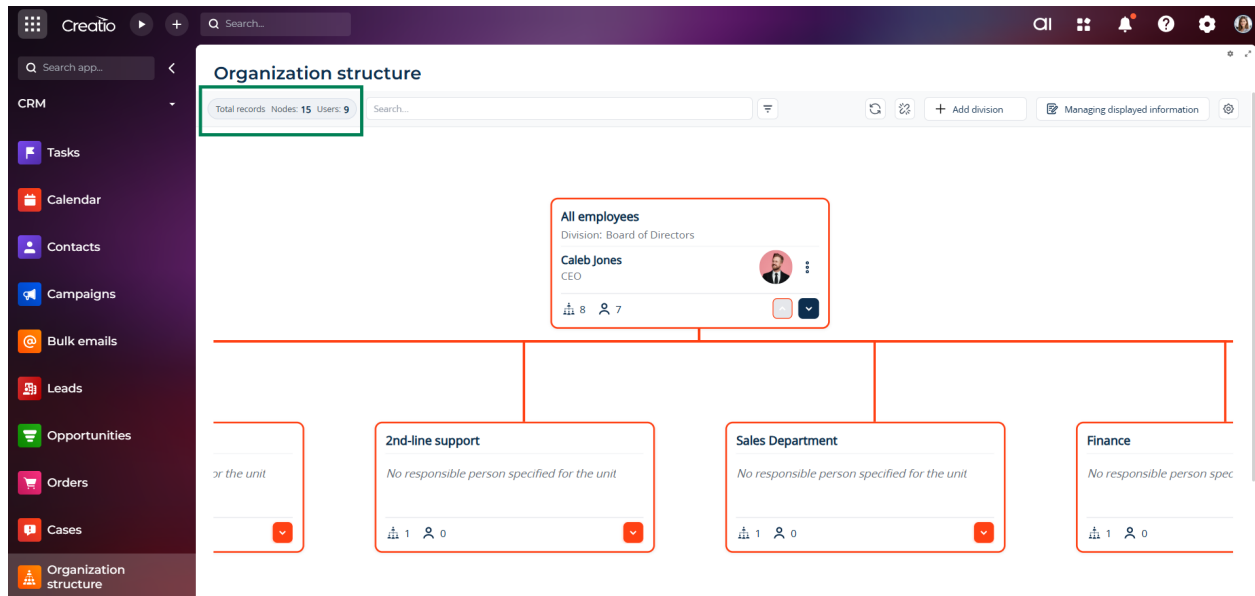


Control Indicators (Counters)

The top panel of the application displays real-time counters:

- **Node Count:** The total number of created organizational units.
- **User Count:** The total number of employees included in the structure.

The employee count always reflects **unique individuals**. For example, if a specialist holds positions or responsibilities in several different departments simultaneously, the system will count them only once.



Access Rights (Permissions)

User:

- **View structure:** Full access to navigate the organizational tree.
- **Search functionality:** Ability to use all search and filtering tools.
- **Navigation:** Access to contact cards via direct links within the nodes.

System Administrator:

- **Settings Access:** Exclusive access to the **Gear (Settings)** icon.
- **Tree Management:** Full rights to edit the structure and add new units.
- **Display Configuration:** Manage displayed information and configure fields for employee cards.
- **System Maintenance:** Ability to perform cache resets and data refreshes.

Employee Management

The system automatically synchronizes the organizational structure by tracking changes in employee records.

- **Transfers:** When a department is updated in an individual's record, the system detects the change and automatically reassigns them within the organizational hierarchy.
- **Offboarding:** If an employee's status is set to **Inactive** or a **Termination Reason** is specified, they are automatically removed from their assigned unit.
- **Role Cleanup:** Upon termination, the employee is automatically removed from all nodes where they were designated as the **Owner** (or **Manager**).
- **Onboarding:** When a new employee record is created and a department is assigned, the system automatically places the individual into the corresponding branch of the structure.

Note on Duplicate Units: If duplicate departments exist (e.g., two units named "Development Department"), automatic assignment will be disabled. Since the system cannot resolve which unit to prioritize, manual intervention by an HR manager is required to ensure data integrity.

Configuring "Autopilot" (Handle)

To enable the automatic synchronization features described above, you must verify the GenHandleAutomaticDivisionChanging system setting.

- Default Value: The default is set to false. In this state, the system ignores any changes made to employee records and does not update the organizational structure automatically.
- How to Enable: Navigate to System Settings and set the value to true. Once enabled, the system will begin dynamically updating the structure based on changes to employee statuses and records.