Cúram 8.1.2

Organization Administration Guide

Note

Before using this information and the product it supports, read the information in Notices on page 31

Edition

This edition applies to Cúram 8.1, 8.1.1, and 8.1.2.

Contents

1 Cúram Organization Administration Guide

The organization structure is a representation of the organization's users and functional areas. It partitions administration functionality that is related to an organization's hierarchy structure across many lines. Organization users, structures, reporting hierarchies and financial services can be administratively maintained.

1.1 Introduction

Use the links in this guide to understand its Purpose on page 9, Audience on page 9, and Prerequisites on page 9. A list of the chapters that are included in the guide also is included.

Purpose

The Cúram Organization Administration Guide provides an overview of organization administration within Cúram Platform. It describes tools available to administer the organization's users, organization financial administration, organization structure administration, and the reporting hierarchy of the organization.

One of the main aspects of organization administration is the management of the organization structure. At a high level, the organization structure provides a means of managing the organization's users and functional areas. More specifically, the organization structure allows for the partition of administration functions that are related to an organization's hierarchy structure across many lines.

Audience

This guide is intended for business analysts who are employed by the organization. It is assumed that this audience has a strong knowledge of the organization's business requirements. Only a basic knowledge of the application is required to read this document.

Mostly, this document assumes a low level of technical knowledge from its readers. However, certain aspects of system administration exist that link into the application, and might introduce certain terms more familiar to a reader with a more technical background.

Prerequisites

It is assumed that the reader is familiar with the basic concepts of Social Enterprise Management. In particular, it is assumed that the reader is familiar with the administrative tasks necessary to manage a social enterprise organization, such as the management of the organization's users, organization administration, and the organization's reporting hierarchy.

Chapters in this Guide

Use this list of chapters in the guide to find the information that is related to the various categories of the Cúram Organization Administration Guide.

The following list describes the chapters in the Cúram Organization Administration Guide:

-
  Provides an overview of the organization's structure and various components.
-
  Describes the actions available to administrators for managing an organization structure.
-
  Describes the administration of user accounts, user skills, jobs and positions, and user working patterns. It also provides a high-level overview of user supervision.
-
  Describes organizational reporting in relation to the organization structure. A user's position determines where the user is placed in the organization structure and who that user reports to.
-
  Describes the general administration of an organization's facilities.
-
  Provides a summary the main concepts of the previous chapters.

1.2 Organization Structure Administration

Use the links in the Organization Structure Administration section to learn about the organization units, positions, and user position assignments. The section also explains how to navigate the organization structure. Administration security also is covered.

Introduction

Organization Structure Administration describes how to understand and navigate through the organizational structure of the Cúram application. This explanation includes an overview of the root unit, organization units, positions, and user position assignment.

At the top of the organization structure is the root organization unit. Any of the organization units can be parent elements for another organization unit.

Each organization unit, including the root organization unit, can include one or more positions. These positions can be filled by one or more registered users. Positions can be left vacant if no user is available to fill it.

The organization structure is an organization chart based on positions. It depicts the relationships between the different roles in the organization, rather than depicting relationships between specific users. When a user's position is changed, only their position assignment changes. The organization structure remains intact.

Organization Root Unit

The root organization unit is the highest level unit within the organization structure. All other organization units and all positions within the organization structure are contained within the root unit. An organization unit can be added to the root organization unit or to another organization unit

> **Note:** The root unit must be created before any other organization units can be added to the structure.

Organization Units, Positions, and User Position Assignment

Each organization unit, including the root organization unit, can include one or more positions. The organization unit is the parent element to any positions contained within it. A default location can be specified for an organization unit.

Positions can be filled by one or more registered users. This structure allows for instances where a user might leave the company and their position becomes vacant until another user is assigned to that position. If a location is not specified for a position, the position of the organization unit default location is assigned automatically.

Users report to other users based on their position assignment. Typically, a user reports to the user or users assigned to their lead position. For more information, see 1.2 Organization Structure Administration on page 10.

> **Note:** If a user is not assigned to a position, then that user is not represented in the organization structure and is not assigned to a job within the organization. This limitation means that work cannot be allocated to that user based on their job.

Navigating the Organization Structure

Two ways exist to view the organization structure-the list view and the tree view. Use this information to understand the difference between the two views and how to use them.

The list view allows a user to see the details of an organization structure by using tabs. The tab displays information that is grouped by the organization units, positions, and users. The list items in each tab can be expanded to display more information.

By default the organization structure is displayed in the list view. The tree view presents the same elements as the list view, but displays them according to their hierarchical relationship. A user can drill down through the tree view or select an element to see detailed information on that element displayed.

The tabs for the organization structure include **Home**, **Tree View**, **Organization Units**, **Positions**, and **Users**. A user can view details of any component in the organization structure by selecting the relevant organization unit, position, or user from the tabs. Each page has action menus with links relevant to that page.

The tree view allows the user to see at a glance the hierarchy of the organization structure and is accessed by using the **Tree View** tab, which is available on the home pages for the organization units, positions, and organization structure. An organization unit can be expanded to reveal sub organization units. Positions can be expanded to show the users who are assigned to them. Users can add organization units, positions, and users to the tree structure.

The organization structure can be viewed in the tree by expanding out the tree nodes. A user can view details of any component in the organization structure by selecting the relevant organization unit, position, or user in the tree. Pages that are associated with each tree node have action menus with links to create and delete child organization units, create positions, edit organization unit information, and assign a default location.

Administration Security

Each organization unit can have Read, Maintain, and Create Unit Security Identifiers (SIDs) assigned to it. The Create Unit SID is the SID that a user must create a child organization unit for the organization unit. The Read SID is the SID that a user must view organization unit details and details of its child units and positions. The Maintain SID is the SID a user must maintain details of the organization unit and its child units and positions. The Maintain SID and the Create Unit SID always take precedence over the Read SID. For instance, where the user has the right to maintain a unit or create a child unit for a unit, they automatically have the right to view the unit regardless of whether they have read rights.

Consider the following organization structure of Midway Unit, which has a child unit, Midway Claims Unit, which itself has a child unit, Claims Intake Unit.

The following SIDs are specified for the units referred to previously:

Table 1: Administration security example

Organization Unit	SIDs specified
Midway Unit	`read` SID, `maintain` SID, `create unit` SID
Midway Claims Unit	No SIDs specified
Claims Intake Unit	`create unit` SID

If a user has the Read, Maintain, and Create Unit SID for the Midway Unit, they can view, maintain, and create a child unit for Midway Unit. The user can also view, maintain, and create a child unit for the Midway Claims Unit. However, for the Claims Intake Unit, the user can view and maintain only the details of the Claims Intake Unit. To create a child unit for the Claims Intake unit, the user must have the Create Unit SID that is specified for the Claims Intake Unit added to their profile.

Sensitivity Security

Sensitivity security is applied to secure high profile or risky data. A sensitivity level is assigned to the sensitive data or to the client to restrict the viewing and modification of the data to a few users.

All users, participants, participant notes, and case notes are assigned a sensitivity level. Extra sensitivity security is available for service plans. All contracts, sub goals, and plan items are also assigned sensitivity levels. The sensitivity level range is 1 - 5, with 5 being the highest level. The default sensitivity level for all users, participants, participant notes, and case notes is 1. Users are permitted to modify and view the secured data only if their sensitivity level is either equal to or higher than the data’s sensitivity level. For example, if a user with a sensitivity level of 3 wants to access or modify an activity that concerns a participant, the participant’s sensitivity level must be equal to or less than 3.

Where a case has multiple case members, determination of which data on the case a caseworker can access needs to extend beyond a comparison between the user’s sensitivity level and that of a single client. The sensitivity level of all case members involved needs to be considered. However, because the primary client on the case represents the head of household, access to the primary client's data is the primary consideration for whether the user can access the case.

The goal is to offer the user a complete view of the case so that the user has all the information available to them to allow the caseworker to progress the case as required. However, at the same time, a client's sensitive data must be protected. To fulfill the goal, when a user is trying to access a case that has multiple case members, and where sensitivity levels vary across the case members, the following criteria apply:

- The user must have a sensitivity level equal to, or greater than, the case participant to have full access and rights to case data. Access based on sensitivity is derived from the case participant with the highest sensitivity level.
- If the user does not have access to the primary client's data, then the user does not have the appropriate sensitivity level. Access to the data is denied or the data is masked.
- If the primary client and the user have the same sensitivity level but other case members on the case have a higher sensitivity level, the system allows the user access to view the case. However, the user is unable to modify any aspect of the case. Therefore, the case participant is protected by restricting the modification of data on the case participant's case to a user with an appropriate sensitivity level.

The following examples show how the criteria are applied:

- **Example 1**
  The primary client has a sensitivity level of 2, and the case worker and the case member have a sensitivity level of 1. The case worker cannot access the case. Certain data that is returned in a search is masked.
- **Example 2**
  The primary client and the case worker have a sensitivity level of 1, and the case member has a sensitivity level of 2. The case worker can access and view the case, but the case worker cannot modify the case. For the case member who has a higher sensitivity level, certain related data that is returned in a search is masked.

1.3 Managing the Organization Structure

Use the links in the Managing the Organization Structure section to learn about how to create and activate an organization structure. The section also covers other aspects of working with an organization structure, such as superseding, canceling, and cloning.

Introduction

The Managing the Organization Structure section provides information on creating, activating, and superseding the organization structure. Since the organization structure is an important aspect of the organization, it is likely that one is activated as part of setting up the application. The organization structure defines the relationship between users, positions, and organization units in the organization. Organization structures can have a status of active, in edit, superseded, or canceled.

Creating an Organization Structure

An organization structure must be created before organization units can be defined for the organization. After an organization structure is created, it can be viewed in a tree structure or in a non-tree structure. A new organization structure has a status of **in edit** until it is activated.

The first component added to the organization structure is the root organization unit. Child organization units and positions then can be added to the root organization unit.

Translating Organization Structure and Organization Unit Names

If your Cúram application supports more than one language, you can add translation text for the organization structure name and any configured organization units.

The Cúram application uses the correct language for the organization structure name and organization unit names at runtime based on the user's locale. If Cúram supports a single language, but that language is not English, you can edit a name in that language by selecting the **Edit** action for the name you want to update.

Translating the Organization Structure Name

Complete the following steps:

1. Log in to the Cúram application as an administrator.
2. Click **Administration Workspace** > **Shortcuts** > **Organization** > **My Organization**.
3. From the tab navigation bar, click **Structures** > **Organization Structures**.
4. Click the organization structure name.
5. On the Organization structure home page, click the Translate Text icon. A list of existing translations for the organization structure name is displayed.
6. Do one of the following:
    - Add a new translation.
        1. Click **Add Translation**.
        2. Select the language for the organization structure name translation.
        3. Enter the translation for the organization structure name text.
        4. Click **Save**.
    - Modify an existing translation.
        1. Click the **Edit** action for the translation you want to modify.
        2. Edit the translation for the organization structure name text.
        3. Click **Save**.
7. Click **Close**.

Results: The organization structure name is translated with the changes you made. Log in to Cúram as a caseworker and from an integrated case, click **User Roles** > **New Owner** > **Organization Unit Search**. The organization structure name is displayed in the language based on the user's default locale.

For more information about configuring text translations, see the *System Administration Guide*. For more information about developing localizable text translations, see the *Web Client Reference Manual*.

Translating Organization Unit Names

Complete the following steps:

1. Log in to the Cúram application as an administrator.
2. Click **Administration Workspace** > **Shortcuts** > **Organization** > **My Organization**.
3. From the tab navigation bar, click **Structures** > **Organization Structures**.
4. Click the organization structure name.
5. On the Organization structure home page, click the **Organization Units** tab. A list of the organization units that are recorded for the organization structure is displayed.
6. Click the organization unit whose name you want to translate.
7. On the organization unit home page, click the Translate Text icon. A list of existing translations for the organization unit name is displayed.
8. Do one of the following:
    - Add a new translation.
        1. Click **Add Translation**.
        2. Select the language for the organization unit name translation.
        3. Enter the translation for the organization unit name text.
        4. Click **Save**.
    - Modify an existing translation.
        1. Click the **Edit** action for the translation that you want to modify.
        2. Edit the translation for the organization unit name text.
        3. Click **Save**.
9. Click **Close**.

Results: The organization structure name is translated with the changes you made. Log in to Cúram as a caseworker and from an integrated case, click **User Roles** > **New Owner** > **Organization Unit Search**. The organization structure name is displayed in the language based on the user's default locale.

For more information about configuring text translations, see the *System Administration Guide*. For information about developing localizable text translations, see the *Web Client Reference Manual*.

Superseding and Canceling the Organization Structure

An active organization structure is superseded when an **in edi**t or **superseded** organization structure replaces it through the activation process.

An organization structure can be deleted only if it has a status of **in edit** or **superseded**. When an organization structure is **in edit**, it is not being used, and it can be canceled. Likewise, a **superseded** organization structure is no longer in use and can be canceled.

Cloning the Organization Structure

An active organization structure and all of its components can be cloned. When an organization structure is cloned, a new relationship is created that links the Position, Organization Unit, and Users of the active organization structure is created for the cloned organization structure. Cloning allows the agency to create an identical structure, including the Organization Units, Positions, and Users of the active organization structure.

When an organization structure is cloned, the status of that organization structure is **In Edit**. The agency can then modify the **In Edit** organization structure as required without it impacting the existing active structure. After the agency is satisfied that the **In Edit** structure is complete, this organization can be activated. Activating this action results in the existing active organization structure to be superseded and the previously cloned structure to be activated.

1.4 User Administration

Use the links in the User Administration section to learn about how an administrator can manage the users of the organization. The section how to maintain user accounts and how to match user skills with jobs and positions. User supervision and user working patterns also are covered.

Introduction

Cúram organization administration allows an administrator to manage the users of the organization. Users are registered and important information about them is stored including but not limited to their positions, jobs and skills.

Maintaining User Accounts

A user account is set up for all users registered on the system. This account includes the user's business phone number, email address, and fax number. Contact information can be automatically retrieved by the system when issuing correspondence to or from the user. For example, notifications from the organization to the user can be sent to the user's email address.

All user accounts include information regarding the user's security access rights. This includes the user's log in information (password and username), access periods (when the user can log into the system), and whether or not the user account is enabled. The administrator can search for closed and deleted users in the application. Closed users can also be searched for as part of the regular user search.

A user's security role is also stored in the user account. This security role defines the business operations and fields that the user can perform and/or access on the system. Security roles may be set up in line with or relevant to positions within an organization to define the list of access rights a user requires in order to fulfill a particular role. However, assigning security at the user level rather than position or role level means that security can be tailored per individual. Security rights can be enhanced or restricted for individual users, if necessary.

Additional security set up on a user account includes the user's location based security rights and the user's sensitivity access level. An organization location is assigned to all users. This location defines the resources available to the user, such as a printer. An organization location is assigned to all users. This location defines the resources available to the user, such as a printer.

An organization may want to limit user access to data in the main application e.g. case and client information, based on the location of the user and the location of the data.

For more information about location based security, see the *Location Administration Guide*.

Security rights can be enhanced or restricted for individual users, if necessary, based on the user's security role and sensitivity level. For a complete overview of user security, see the *System Administration Guide*.

Deleting User Accounts

User accounts can be deleted. For example, a user account can be deleted if it was created in error. When a user account is deleted, any positions held by the user are also deleted. A user account cannot be deleted if the user currently holds any role on a case that is stored on the system or one or more open tasks are assigned to the user.

Closing and Reopening User Accounts

User accounts can be closed if the user has left the organization or completed all assigned tasks. An end date is recorded. After this date, the user's tasks and notifications are re-directed to another user. Task redirection enables supervisors to redirect tasks from one user to another. This function is useful for situations such as annual leave. The supervisor can specify start and end dates, and choose which user to redirect to. Note that a user account cannot be closed if other users currently reports to the user or if one or more open tasks are still assigned to the user. The user's supervisor must transfer any outstanding tasks to a different user before the user's account can be closed.

For more information about task redirection, see the *Supervisor Workspace Guide*.

Disabling User Accounts

A user account can be disabled. For example, an account may be set up for a user in advance of his or her joining the organization. The user's account may be disabled until the user commences work. When a user account is disabled, the user cannot log into the system until the user account has been enabled.

Summary

A user summary page for each user is available in the tree version of the organization structure only. The user summary page means that an administrator does not have to leave the tree structure in order to view summary details of the user.

User Skills, Jobs and Positions

One of the challenges of an organization is to ensure that the members of the organization, represented as users are matched up with one or more jobs based on their skills. It is also important to ensure that there is a clear reporting hierarchy so that its members are aware of who they report to and who reports them. The relationship between the reporting structure and a user's skills and jobs is important. Organizations may find it useful to assign work to users based not only on their position in the organization but also on the jobs they fill and the skills they have.

Skills

A member of an organization will have a set of skills and competencies, which can be graded based on experience and performance. Examples include counseling skills, computing skills, and language skills. An organization will often employ competency models and job templates for the different work that users are required to complete. The organization is provided with the ability to maintain a database of user skills and abilities that can be linked directly to each user's profile. This means work can be allocated to the most appropriate user. For example, computing tasks can be assigned to users with computing skills. It also provides those who allocate the work with the information they need to distribute work in an optimal way for example, more challenging computing tasks can be assigned to users with a higher level of computing skills.

By maintaining language skills, an organization can automatically redetermine whether clients within a case require a translator when the language skills of a user change. When the application is configured for automatic redetermination, the preferred language of each case participant in all open cases that are owned by a user is compared to the language skills of the user. Depending upon the volume of cases that are owned by the user, redetermination occurs in either online or batch modes.

Jobs

Jobs are the functional roles of users within the organization. A user will have a job title that describes the type of work that the user does, for example, social worker or claims analyst. An administrator can add translation text for job titles to support users who use that language.

The organization's list of jobs can be mapped to users within the organization. This is done via a user's position assignment. Work can be assigned or allocated to users based on their jobs.

Translating Job Names

If your Cúram application supports more than one language, you can add translation text for job names to support users who use that language. You can also modify existing translation text for a job name.

About this task

The Cúram application uses the correct language at runtime based on the user's locale. If Cúram supports a single language, but that language is not English, you can edit the job name in that language by selecting the **Edit** action for the job whose name you want to update.

Procedure

1. Log in to the Cúram application as an administrator.
2. Click **Administration Workspace** > **Shortcuts** > **Organization** > **My Organization**.
3. Click the **Jobs** tab.
4. Locate the job whose name you want to translate.
5. Click the Translate Text icon. A list of existing translations for the job name is displayed.
6. Do one of the following:
    - Add a new translation.
        1. Click **Add Translation**.
        2. Select the language for the job name translation.
        3. Enter the translation for the job name text.
        4. Click **Save**.
    - Modify an existing translation.
        1. Click the **Edit** action for the translation you want to modify.
        2. Edit the translation for the job name text.
        3. Click **Save**.
7. Click **Close**.

Results

The job name is translated with the changes you made everywhere it appears in the application. For example, log in to Cúram as a caseworker and from an integrated case, click **Administration** > **User Roles** > **New Supervisor** > **Job Search**. The job name is displayed in the language based on the user's default locale.

For more information about configuring text translations, see the *System Administration Guide*. For information about developing localizable text translations, see the *Web Client Reference Manual*.

Positions

Positions serve as place holders for users within the overall organization structure. Each user is assigned to a position that frames them within their organization unit and with respect to other units in the organization. The position indicates who that user reports to and who reports to the user.

Positions are also the containers for the jobs in the organization. The position of Social Worker 1 in the organization may have any number of jobs associated with it. For example, as well as having the job of Social Worker, the position may also have the jobs division manager, claim analyst and reviewer associated with it.

Typically, positions are used to define the levels within certain job sets. In this case, many positions will share the same job, such that the position becomes a level for that job. For example, the job, Social Worker, might be assigned to three positions, Social Worker 1, Social Worker 2, Social Worker 3, each one of these representing a level of experience for that job.

Positions can be assigned locations. Along with the locations assigned to users, this can determine access to case and client information if location-based security is applied.

A user's position determines the user's supervisors in the organization reporting hierarchy. Organization reporting is described in detail in 1.5 Organization Reporting Administration on page 21.

If your Cúram application supports more than one language, an administrator can also add translation text for position names to support users who use that language.

Translating Position Names

You can add translation text for position names to support users who use that language. You can also modify existing translation text for a position name.

About this task

The application uses the correct language at runtime based on the user's locale. If Cúram supports a single language, but that language is not English, you can edit the position name in that language by selecting the **Edit** action for the position name you want to update.

Procedure

1. Log in to the Cúram application as an administrator.
2. Click **Administration Workspace** > **Shortcuts** > **Organization** > **My Organization**.
3. From the tab navigatioin bar, click **Structures** > **Organization Structures**.
4. Click the organization structure name.
5. On the organization structure home page, click **Positions**. A list of the positions that are recorded for the organization structure is displayed.

6. Click the position whose name you want to translate.
7. On position home page, click the Translate Text icon. A list of existing translations for the position name is displayed.
8. Do one of the following:
   - Add a new translation.
     1. Click **Add Translation**.
     2. Select the language for the position name translation.
     3. Enter the translation for the position name text.
     4. Click **Save**.
   - Modify an existing translation.
     1. Click the **Edit** action for the translation you want to modify.
     2. Edit the translation for the position name text.
     3. Click **Save**.
9. Click **Close**.

Results

The position name is translated with the changes you made everywhere it appears in the application. For Example, log in to Cúram as a caseworker and from an integrated case, click **Administration** > **User Roles** > **New Owner** > **Position Search**. The position name is displayed in the language based on the user's default locale.

For more information about configuring text translations, see the *System Administration Guide*. For information about developing localizable text translations, see the *Web Client Reference Manual*.

User Supervision

Every user reports to at least one other user who monitors their work. The term supervisor has been designated to represent this relationship.

Supervisors can be provided with a specialized account in the system for the management of tasks and cases if the Supervisor Workspace has been purchased. The Supervisor Workspace allows supervisors to directly manage work for the following users:

- Users in organization units in which the supervisor holds a lead role
- Users in child units of the units in which the supervisor holds a lead role
- Users in a position which reports directly to the supervisor's position

For more information about the supervisor application, see the *Supervisor Workspace Guide*.

User Working Patterns

Working patterns can be maintained for the organization on the whole, as well as for each individual user. The organization working patterns are the default working patterns for the system users, but these defaults are overridden by an individual user's working pattern. Each working pattern covers the working hours for a 14 day period which starts on a Monday and ends on the second Sunday. Note that an end date does not have to be set for a working pattern. In which case, the 14 day period will repeat indefinitely. The organization and each user can have multiple working patterns but the dates of those patterns cannot overlap.

Standard working hours are set for a working pattern, e.g., from 9 AM to 5 PM. Any hours outside this standard are defined as either non-standard or non-working hours. For example, the organization may have a half-day every second Friday. As such, the working hours for the second Friday can be set as non-standard working hours from 9 AM to 1PM. Non-working hours can be added for one or more days in a working pattern and automatically apply to a full day, i.e, a full non-working day.

1.5 Organization Reporting Administration

Use the links in the Organization Reporting Administration section to learn about the chain of command within an organization structure. The section explains how to set up organizational reporting and how the relationship between users and supervisors is affected by changes within the organization.

Introduction

Organization reporting is the chain of command within the organization structure; it establishes the supervisors and the users who report to them. The process of setting up organization reporting is aligned with the set up of positions in the organization structure. User position assignment in the organization determines the relationships between users and their supervisors. It is important to understand how changes made to the organization structure can impact these relationships.

Setting Up Organization Reporting

The process of setting up the organization reporting involves the assignment of users to lead positions. Any user assigned to a lead position will be the supervisor of users assigned to positions in the same organization unit.

A chain of command is used to assign supervisors to users for organization units with no lead positions or else with empty lead positions (it has a lead position but no users are assigned to it).

Lead Positions and the Primary Lead Position

Certain positions within the organization can be labeled as lead positions. Users assigned to lead positions are supervisors of users assigned to reporting positions. As part of setting up the organization's reporting, a lead position must be assigned to the root organization unit. This is known as the primary lead position; it ensures that there is at least one reporting position for all other positions.

If a position does not have a specified lead position, then that position will report to a lead position based on the organization structure. If no lead positions are assigned to an organization unit or any of its parent units, the unit will report to the primary lead position.

Reporting Positions

A user's position assignment determines who that user reports to. Typically, a user reports to the user(s) assigned to his or her lead position in the same organization unit. For example, the organization unit Social Workers, contains the positions Social Worker 1, Social Worker 2, and Lead Social worker; therefore, John Smith will report to any users assigned to the Lead Social

Worker position. If Jane Doe is assigned to the Lead Social Worker position, then she is John Smith's supervisor.

If an organization unit does not have a lead position or if no users are assigned to it, then the users in that organization unit will report to users assigned to lead positions in a parent or grand-parent organization unit. For example, if no users were assigned to the above-mentioned Lead Social Worker position, then John Smith would report to a user assigned to lead position in the organization unit which is a parent (or grand-parent) to the Social Worker organization unit.

It is also possible for a position to report to another position which is not necessarily a lead position. This can be set up when creating a new position or else modifying it. The options are as follows:

Table 2: Table of Options for Reporting Positions

Options for Selecting Reporting Position	Description
Lead Positions	A position can report to any lead position within the organization structure.
Organization Unit Positions	A position can report to any position within the same organization unit.
Parent Organization Unit Positions	A position can report to any positions assigned to the parent organization unit.
Position Search	A position can report to any position in the organization structure.

Relationship between Users and their Supervisors

Given that organization reporting is linked to the organization structure, it is important to understand how the relationships between users and their supervisors can be impacted by certain changes to the organization structure. This section describes some of the scenarios which might occur in an organization.

Changes to organizational structure may mean that an administrator will need to create a new structure. This will mean the loss of the old structure once the new is activated. The following sections discuss scenarios where changes have been made to reporting structure:

User in Supervisor Role Leaves Organization

If a supervisor leaves the organization, the normal procedure would be for the relevant users to report to the next most senior supervisor in the organization until such time as the position of supervisor is assigned to a new user. An organization is provided with the flexibility to edit the reporting hierarchy without making any changes to the structure. For example, if the user assuming the role of a supervisor of an Organization Unit leaves the company, the reporting structure may be adapted to allow for users within that Organization Unit to report to another position within the same unit, or a position may be edited so that it reports to a user in another Organization Unit.

A Group of Users Reporting to Different Supervisors

The straightforward reporting relationship would be a group of users reporting to the same manager. There can be more complicated relationships, such as a cross-functional team of users who report to different managers. Given the flexibility of reporting positions, there are different options for implementing cross-functional reporting structures. The easiest way to ensure users are reporting to the most appropriate supervisors is to manually set up a reporting hierarchy.

For example, in an organization unit consisting of different levels of social workers, it might make sense to set up reporting relationships based on experience. The less experienced social workers could report to more experienced social workers. The more experienced social workers could report to a lead position in a middle-management organization unit.

Impact of Restructuring Organization Positions

It is important to recognize the impact of restructuring organization positions has on organization reporting. For example, certain positions within an organization might become redundant or change; however, these same positions might still define relationships between users and supervisors. The users assigned to the positions should be reassigned to new positions; their supervisors will need to be assigned to reporting positions. Most organizations are accustomed to managing organization charts which focus on people rather than positions. Extra care should be given when shifting positions within the organization so that users not only are assigned to a position because of their jobs and roles in an organization unit, but also, they should report to the appropriate supervisors.

Handling Users with No Supervisors

There may be users within the organization who do not have supervisors. For example, the CEO of a company will typically answer to a board, but not to a specific supervisor. A simple solution for handing such users is to assign them to the lead position of the root organization unit.

1.6 General Organization Administration

The tools necessary to administer the organization are accessible from the organization home page. The following topics provide information on general organization administration, including the maintenance of organization facilities, financial services, organization calendars, and organization working patterns.

Organization and Location Summary

The administrator is provided with a summary of the active organization and location structure on their home page. This summary provides details of the total number of units, positions and users in the organization structure, and the total number of locations that are maintained for the specific organization.

The Organization Home Page

The organization home page provides access to the tools used to administer organization details that include system users in the organization, the organization's jobs, organization structures, and location structures. It also provides access to the organization activity calendar and employee working patterns.

Most of the information covered in this guide is accessible from the organization home page. The only exception is finance information, which is accessible from the administration home page.

The organization home page displays organization contact details, the organization tax and registration numbers, and the location data security level. The location data security level is used to secure case and client information based on the location of users on the system.

For more information, see the *Location Administration Guide*.

Locations

The locations of the organization are the work places of its users. Each location is organized into a hierarchical location structure that has one root location. Additional information that is maintained for each location includes location holidays, location working patterns, resources, and daily schedules.

Some locations are public offices that are the locations where the public can interact with the organization. All locations have an address. However, multiple locations might exist at the same address. For example, there multiple locations might exist within an office block. Locations can be secured thus limiting the ability of users to access and maintain case and client information based on their assigned location.

For more information, see the *Location Administration Guide*.

Resources

Resources include the tools, equipment, and office spaces that the organization uses to complete its work, for instance, printers or conference rooms. Resources can be assigned to organization locations and organization units.

For more information, see the *Location Administration Guide*.

Organization Web Addresses

Web addresses can be maintained for an organization or an organization unit from the organization home page. From here, users can create, modify, and delete web addresses for organizations and organization units.

Organization Financial Administration

Administration services are provided to maintain financial information for the organization. This information includes banks and bank branches, currency exchange rates, and organization bank accounts. Also included is a financial processing calendar that is used to maintain the financial processing dates for different delivery methods.

Banks and Bank Branches

Banks are the financial institutions in which money is kept (for savings or commercial purposes) or is invested, supplied for loans, or exchanged. Bank branches are the facilities for a specific bank that are responsible for specific banking functions, such as personal banking for individuals who live near the bank branch.

For example, John Smith banks at the Fifth Avenue branch of Citibank in New York. A bank branch is identified through a sort code or Bank Identifier Code (BIC) (if International Bank Account Number (IBAN) functions are enabled).

Organization and participant bank accounts are affiliated with the bank branches established as part of the financial administration services. For example, John Smith's benefits are paid into his checking account that is assigned to the Fifth Avenue bank branch of Citibank.

Currency Exchange Rates

A currency exchange rate is a conversion rate between two currencies. Each organization has a base currency in which it conducts its finances, for instance, US Dollars, GB Pounds. Currency exchange rates can be stored in the application to support the payment and receipt of monetary amounts in a currency other than the base currency. All currency exchange rates for the organization are expressed in comparison to the organization's base currency.

For example, the organization makes pension payments to entitled participants who retired to other countries. The base currency of the organization is Euros. John Smith retired to England where the currency is Sterling. John's weekly payment of €100 coverts to £69 using an exchange rate of Euro/GBP 0.6864.

Financial Processing Calendar

A separate financial processing calendar is included for cash, check, EFT (electronic funds transfer), voucher, and invoice delivery methods. Each one of these calendars stores the dates on which the organization is not able to make payments by using the particular delivery method. For example, the organization might not be in a position to oversee the completion of batch payment processing. Therefore, any payments that fall due on a payment exclusion date needs to be processed by a previous run of the batch processes. These dates are called payment exclusion dates.

For example, on Dec. 25 (a public holiday), cash payments cannot be made as the organization's offices are not open. Dec. 25 is marked as a payment exclusion date on the financial processing calendar for the cash delivery method. An EFT payment can be processed on the public holiday as no payment exclusion date is set up on the EFT financial processing calendar.

Prepayment requirements can be set up for payment exclusion dates. If prepayment is required, financial processing occurs on the nearest processing date before the payment exclusion date. For example, cash payments due on Dec. 25 are processed on Dec. 24, provided Dec. 24 is not a payment exclusion date for cash payments.

Organization Calendars

The following topics provide an overview of organization calendar functions. This informational overview includes organization calendar activities, and location holiday calendars.

Scheduling Organization Activities

The organization calendar is used to record once-off and recurring activities for the organization. Activities can be scheduled from an organization calendar by an administrator. Organization activities cannot be related to a concern or a case. Invitees cannot be selected for organization activities, as organization activities address the organization as a whole. If required, a location can be selected for the activity. A start time and end time must also be specified.

Organization activities apply to all system users and appear on the organization activity calendar, a user's individual calendar, and the equivalent user calendar accessible from a user home page.

Scheduling a Recurring Organization Activity

Recurring organization activities can be created. When a user creates a recurring organization activity, the frequency of the activity needs to be set. They are able to be managed as an occurrence or per instance. When an administrator changes an occurrence of a recurring activity, the administrator can choose to apply it to the occurrence, or to the series.

For example, if the organization has a monthly agency-wide status meeting, an activity can be set up for the status meeting to recur on the same day every month.

Scheduling Location Holidays

Holidays are assigned to locations from the location calendar. Location holidays are displayed in the calendars of all users at that location. Holidays for a location also might apply to sublocations.

For example, an administrator can record a public holiday for Dec. 25 in the location calendar for the Midway office and its sublocations. This information then is displayed in the calendars of every user at the midway location and sublocations.

Organization Working Patterns

The organization working patterns are the default working patterns for the system users. These defaults can be overridden by an individual user's working pattern. Functions for maintaining working patterns at the organization level are the same as the functions provided for user working patterns.

To summarize, each working pattern covers working hours for a 14-day period that starts on Monday and ending on the second Sunday. Standard working hours are set for each working pattern, for example, 9:00 AM to 5:00 PM. The organization and each user can have multiple working patterns but the dates of those patterns cannot overlap.

Announcements

You can configure an application-wide announcement message to display on the home page of an application view for a set period. If your Cúram application supports more than one language, you can also translate announcement text and comments for display at runtime.

Announcements are used to inform users of information that they might need to be aware of, such as informing when a particular front-line office is closed or if technical issues exist with a phone system. An example of an announcement might be something such as `Midway Office is closed today due to flooding, Downtown Office will be managing all clients and has extra staff to handle the numbers`.

Translating Announcement Text and Comments

You can add translation text for announcement text and comments that you add to an announcement to support users who use that language. You can also modify existing translation text for an announcement text and comments.

About this task

The application uses the correct language at runtime based on the user's locale. If Cúram supports a single language, but that language is not English, you can edit the announcement text and comments in that language by selecting the **Edit** action for the announcement whose text and comments you want to update.

Procedure

1. Log in to the Cúram application as an administrator.
2. Click **Administration Workspace** > **Shortcuts** > **Organization** > **My Organization**.
3. Select **Announcements** from the tab navigator bar.
4. Expand the announcement whose text and comments you want to translate.
5. Click the Translate Text icon. A list of existing translations for the announcement text or comments are displayed.
6. Do one of the following:
    - Add a new translation.
        1. Click **Add Translation**.
        2. Select the language for the announcement text or comments translation.
        3. Enter the translation for the announcement text or comments.
        4. Click **Save**.
    - Modify an existing translation.
        1. Click the **Edit** action for the translation you want to modify.
        2. Edit the translation for the announcement text or comments.
        3. Click **Save**.
7. Click **Close**.

Results

The announcement text and comments are translated with the changes you made. Log in to Cúram as a caseworker and select the announcement text on the application home page. The announcement text and comments are displayed in the language based on the user's default locale.

For more information about configuring text translations, see the *System Administration Guide*. For more information about developing localizable text translations, see the *Web Client Reference Manual*.

1.7 Conclusion

The Conclusion contains links to a summary of the information in this guide and to sources of addition information. In particular, the summary presents a list of the main concepts that are covered in the guide.

Summary

The Summary contains a list of the main concepts that are covered in the guide.

The following list is a summary of the main concepts that are covered in this guide:

- The application enables users to maintain the organization's facilities, activities, and financial information.
- The organization is provided with an ability to maintain a database of skills and competencies that can be linked to user profiles. This feature means that work can be assigned to the most appropriate users.
- Jobs are the functional roles within an organization and can be mapped to users within the organization.
- Positions are containers for the organization's jobs and placeholders for its users. Any number of users can be assigned to the same position, which means that each of these users performs the same job in the organization.
- Every user reports to at least one other user and has their work monitored by that user. That user is known as a supervisor and the system provides supervisors with a specialized account for the management of tasks and cases.
- The organization structure is an organizational chart based on positions. It depicts the relationships between the different roles in the organization, rather than depicting relationships between specific users.
- Users report to other users based on their position assignment in the organization structure.
- Users who are assigned to lead positions are supervisors of users who are assigned to reporting positions. As part of setting up the organization's reporting, a lead position must be assigned to the root organization unit.
- The administration of the organization structure can be secured whereby only users with appropriate access rights can view or maintain organization units and positions.
- An organization calendar is available in the administration application and can be used to schedule and maintain organization activities.
- A location holiday calendar is available in the administration application.
- Payment processing dates for the organization can be administratively set for a delivery method in a financial calendar.

Additional information

Additional information on the topics that are covered in the guide is covered in the following related documents.

- ***Cúram Participant Guide***
  The ***Cúram Participant Guide*** covers the basic concepts of participant functions.
- ***Integrated Case Management Guide***
  The ***Integrated Case Management Guide*** covers the basic concepts of case processing.

- ***Cúram Evidence Guide***
  The ***Cúram Evidence Guide*** covers the basis concept of evidence.
- ***Cúram Financials Guide***
  The ***Cúram Financials Guide*** covers the basic concepts of financial processing.
- ***Cúram Deductions Guide***
  The ***Cúram Deductions Guide*** covers the basic concepts of deduction processing.
- ***Cúram Communications Guide***
  The ***Cúram Communications Guide*** provides an overview of communication functions.
- ***Cúram Workflow Overview Guide***
  The ***Cúram Workflow Overview Guide*** provides an overview of the workflow functions.
- ***Cúram Verification Engine Guide***
  The ***Cúram*** *Verification Engine****Guide*** provides an overview of the Verification engine.
- ***Cúram Location Administration Guide***
  The ***Cúram Location Administration Guide*** provides an overview of location administration in the Cúram Platform.

Technical Information

The following is a list of technical documents referenced in this guide:

- ***`Cúram Rules Editor Guide`***
  This guide describes how to use the Cúram Rules Editor.
- ***`Inside the Cúram Eligibility and Entitlement Engine`***
  This guide provides an overview of the Cúram Eligibility and Entitlement Engine.
- ***`Cúram Batch Processing Guide`***
  This guide provides information on batch process development.
- ***`Cúram Operations Guide`***
  This guide provides an overview of the operations including application properties.

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