6 Organisational Structure and Mini Explorer

There are two explorers that you can use. The Organisation Explorer and the Mini Explorer.

The Organisation Explorer menu option will only be available to those users with a University wide user profile. For users with a Departmental profile Organisation Explorer will not appear as a menu option, but Mini Explorer can be used to view the department for which the user profile applies.

The whole area of the Organisation Structure is controlled using effective dates. Information that is added, amended, or deleted is recorded as a change on that specific date. It is important that the date selected when using the organisation explorer is the correct one, as the organisation will differ from day to day.

6.1 Using the Organisation Explorer

This feature allows you to view and maintain a dynamic diagram of the structure of schools, faculties and departments in the iTrent display pane. Each item within the structure is enabled to act as a navigational link to the functions and/or content of the selected component.

i   It is suggested that you use the Organisation explorer only to identify an area of the University structure to initialise a search procedure. To add or maintain elements search for the unit, post or position and click the Mini explorer link in the action pane.

6.1.1 To search using the Organisation explorer

1. Select the University of Cambridge in the object pane and click the Organisation explorer link in the action pane.

2. Enter the effective date. The top level node of the Organisation structure diagram appears in the display pane.
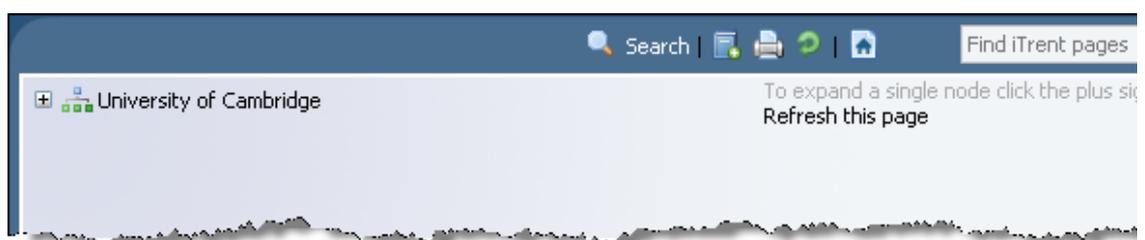
3. Click the Search 🔍 button in the display header toolbar
   iTrent opens the sliding search pane to the right of the display area.

4. Enter the required search item in the text field provided and click 🔍
   iTrent displays all the matching items in the search pane.
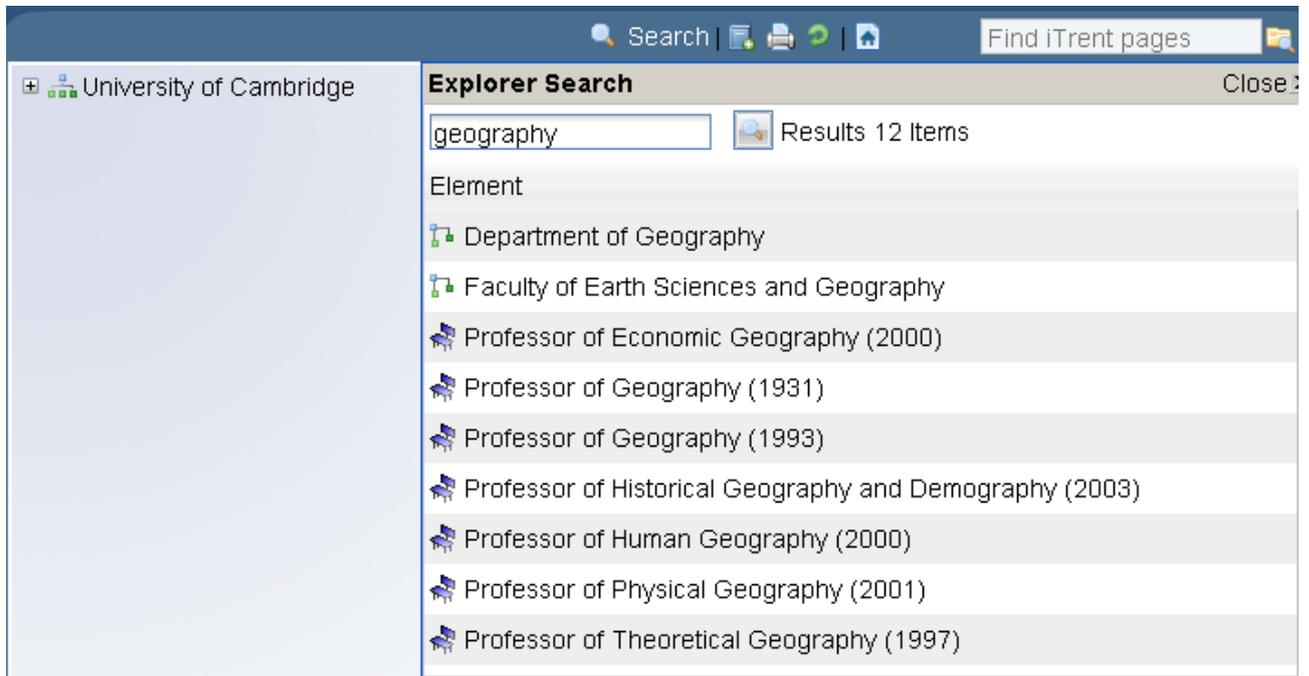
5. Select the required item from the search result.
   iTrent expands the Organisation explorer to reveal the location of the selected item.
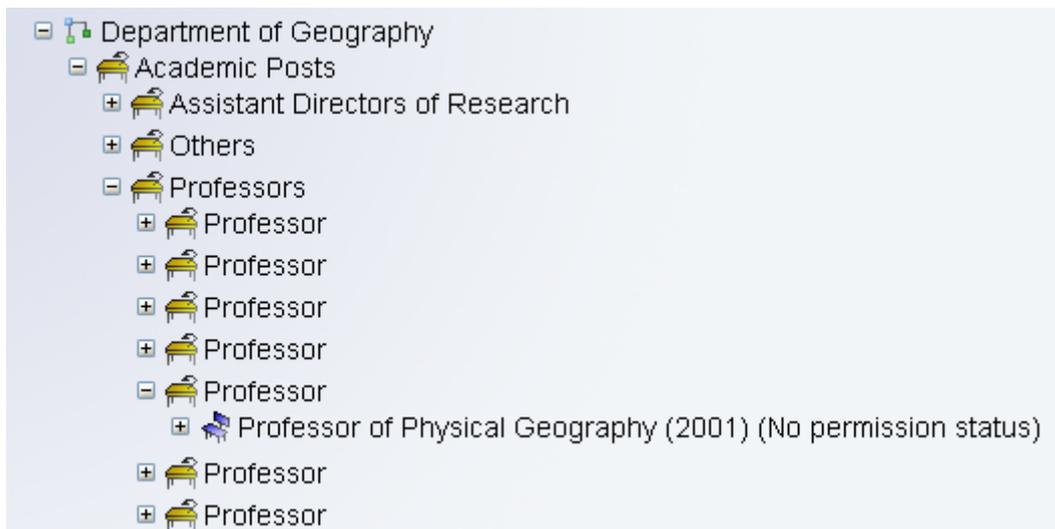
6.2 Organisation Structure

iTrent's organisation structure is made up of Units, Posts, Positions and Contracts.

Unit

The main units which make up the University of Cambridge structure are Colleges, Council and General Board, External and Roll Delivery Unit.
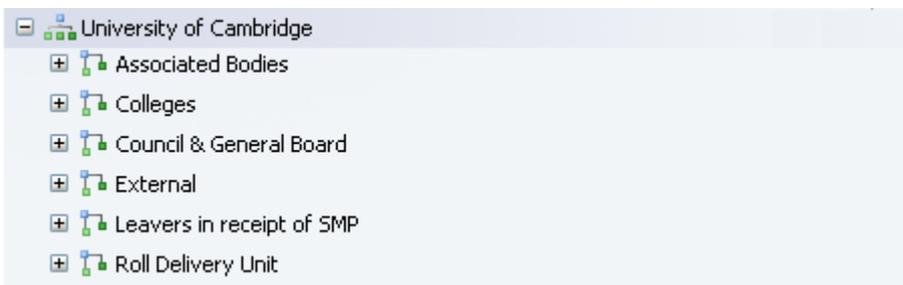
These units are then further divided into units within these main units for the Schools, Faculties and Departments.

Post

Within the Faculties and Departments are Posts. There are three levels of posts within the structure.

This screen displays the Department of Architecture

Level 1 posts are Academic, Academic Related, Headships, Research, Research Students and Support

Level 2 posts are shown below this – Assistant Directors, Others, Professors, Readers, Senior Lecturers, University Lecturers

Level 3 posts are the 2 Professor Posts that exist within the Department.

Position

A position is a location in the Organisation in which a person can be placed.

A person cannot occupy a post directly; the post is always filled by means of an intermediate 'position'.

If the chair icon is blue the position is occupied.

If the chair icon is green it indicates that the position is vacant and as yet unoccupied

If the chair icon is red it indicates that the position is vacant and has a recruitment requisition attached to it. (Recruitment functionality will be a later phase of the project)

People

Each person that we hold details for in iTrent will be shown with this icon. People are attached to the structure via a position and a contract is created.

A contract within iTrent is not a contract of employment, but the piece of data which binds an employee to a payroll.

Reporting

Reports that are produced from iTrent detail reference numbers that are automatically generated by the system

Occupancy Reference	Post Reference	Position Reference	Position
40013143	56542	56542	University Lecturer

Once a post and position have been created the post and position reference numbers will always remain the same regardless of who occupies the position.

The occupancy reference number is a unique number specific to an individual in that position. If the person leaves and is replaced by a new occupant a new occupancy reference unique to that person's occupancy is generated.

Post and Position Menus

The position details menu displays information specific to the individual employee who occupies a position.

Position details
- Addresses
- Contacts
- Mini explorer
- Patterns
- History
- Hours and basis
- Inheritance chart
- Occupancy details
- Payscale values
- Position details
- Position inheritance summary
- Position occupancy history
- Position summary
- Salary details
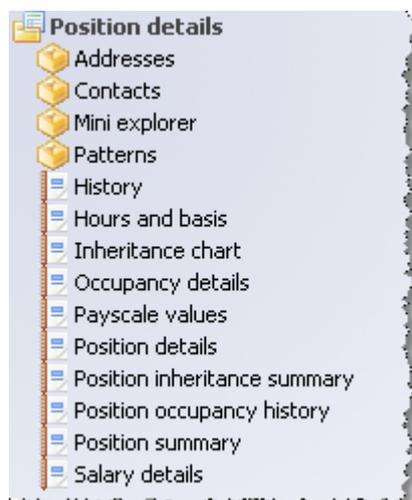
The Payscale values form shows the grade and scale point for the employee.

Occupancy details shows expected occupancy end date, for example where an employee is limited by their work permit expiry date.

Hours and basis shows the number of hours that the employee is contracted to work.

Addresses shows the UMS address at which the employee works.

Each position is attached to a post and the post details menu displays information specific to the post and the conditions that a position should go back to when an occupant leaves.
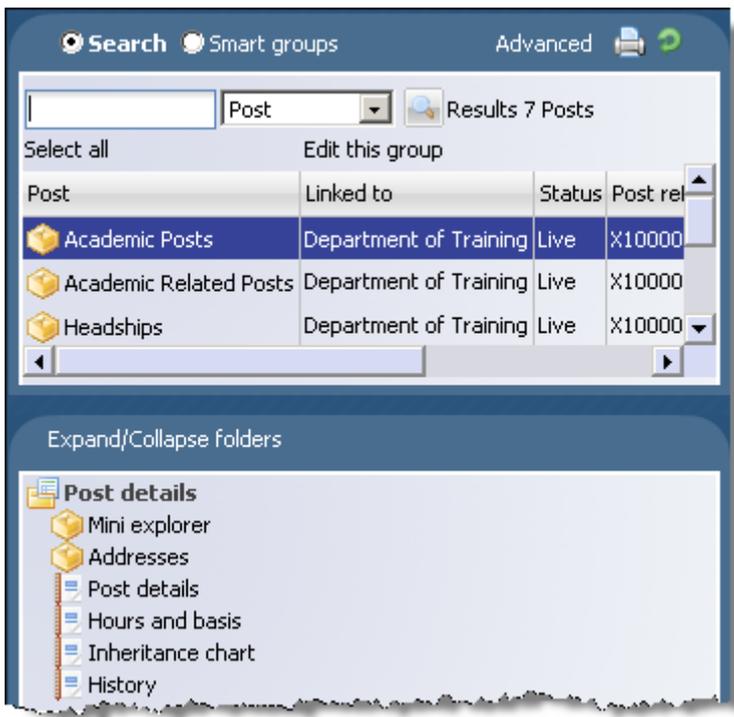
The Payscale values form (available on HR users profiles) shows the grade of the post, but no scale point as this is individual to the occupant.

Hours and basis shows whether it is a full time or part time post. A post may show as full time, but position details could show that the employee occupying the position is working less hours.

Addresses shows the UMS address for the faculty or department. The position details address may be different where the occupant is located in a different place of work.

6.3 Using the organisation mini explorer

The mini explorer allows you to view and maintain your departments' details in the object pane, and to add, maintain and view new elements to it as required.

As the whole structure of the University is so large it is easier to create, amend or view the specific area of the organisation structure you require using the Mini Explorer.

6.3.1 Accessing the mini explorer

With the University of Cambridge selected in the object pane, select Unit, Post or Position from the action pane and search for your department.

Select your department from the object pane and click the link to the mini explorer
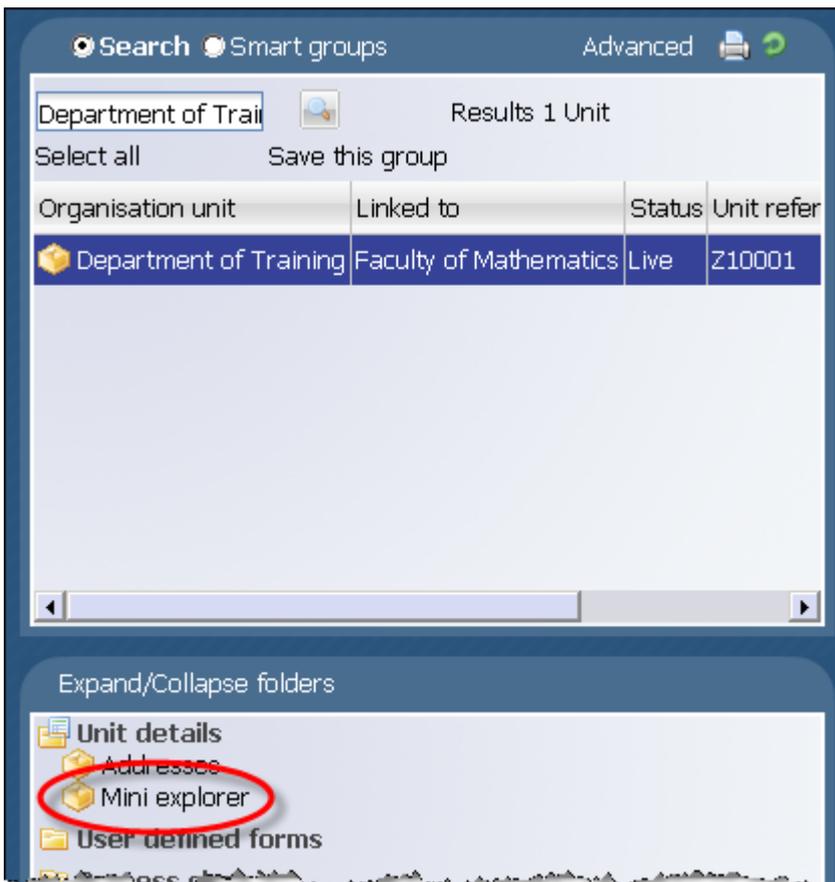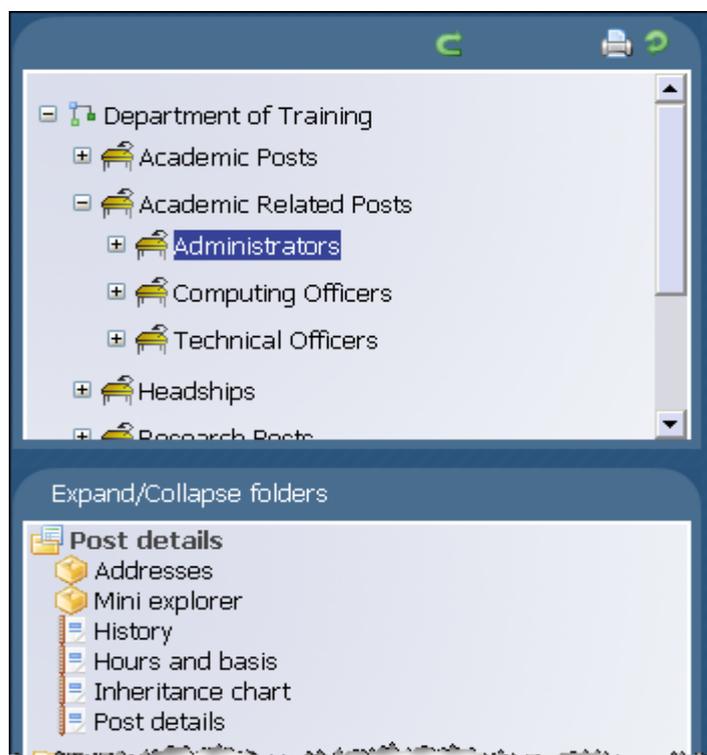
The unit icon of the department will appear in the object pane and can be expanded if applicable by clicking the plus icon ⊞ adjacent to it.

The mini explorer can also be used to access details of a post or position in a similar way.

6.3.2 To maintain existing data

If you need to modify existing structure components select the required element in the object pane and the related function will become available in the action pane.

Selecting a person in the object pane will make person related options available in the action pane. Selecting unit, post or position in the object pane will update the action pane to display the available options for the unit, post or position respectively.

6.3.3 Amending or entering new details

Select the element (node) to be modified in the object pane and then click the required element details node in the action pane. Existing information will be shown on the function details page in the display pane, where it can be amended as necessary.

When you have completed an entry or amendment, click [Save] in the display pane to save the changes.

Access to be able to maintain, amend or enter new details will be according to your individual user profile.