

IBM Cúram Social Program Management  
Version 6.0.5

*Cúram Organization Administration  
Guide*

**IBM**

**Note**

Before using this information and the product it supports, read the information in "Notices" on page 17

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# 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.

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## Introduction

### Purpose

This guide provides an overview of organization administration within the Cúram Enterprise Framework. It describes tools available to administer the organization's users, organization financial administration, organization structure administration, and the organization reporting hierarchy. 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 functionality related to an organization's hierarchy structure across many lines.

### Audience

This guide is intended for business analysts 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. For the most part, this document assumes a low level of technical knowledge from its readers; however, there are certain aspects of system administration which link into the application, and thus, may 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 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. It is assumed the reader has read the Organization Location Administration Guide. This guide may also be read in conjunction with the Cúram System Configuration Guide.

## Chapters in this Guide

The following list describes the chapters in this guide:

### **Organization Structure Administration**

This chapter provides an overview of the organization's structure and various components.

### **Managing the Organization Structure**

This chapter describes the actions available to administrators for the purpose of managing an organization structure.

**User Administration**

This chapter 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.

**Organization Reporting Administration**

This chapter describes organization reporting in relation to the organization structure. A user's position determines where the user resides in the organization structure and who that user reports to.

**General Organization Administration**

This chapter describes the general administration of an organization's facilities.

**Conclusion**

This chapter provides summarizes the main concepts of this guide.

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## Organization Structure Administration

### Introduction

This chapter describes the administration of the organization structure. This 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 that 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 may leave the company and his or her position becomes vacant until another user is assigned to that position. If a location is not specified for a position, the position is automatically assigned the default location of the organization unit.

Users report to other users based on their position assignment. Typically a user reports to the user(s) assigned to his or her lead position. Organization reporting administration is described in Chapter 5.

It is important to note that if a user is not assigned to a position, then that user will not be represented in the organization structure and will not be assigned to a job within the organization. This means that work cannot be allocated to that user based on his or her job.

## Navigating the Organization Structure

There are two ways to view the organization structure: the list view and the tree view. The list view allows a user to see the details of an organization structure using tabs. The tab displays information 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 tab for the organization structure includes 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 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 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 may have Read, Maintain, and Create Unit SIDs assigned to it. The Create Unit SID is the SID that a user must have to create a child organization unit for the organization unit. The Read SID is the SID that a user must have to view organization unit details and details of its child units and positions. The Maintain SID is the SID a user must have to 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. i.e. 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 or not.

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 above units:

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 only view and maintain the details of the Claims Intake Unit. To create a child unit for the Claims Intake unit, the user will have to have the Create Unit SID which has been specified for the Claims Intake Unit added to their profile.

### Sensitivity Security

Sensitivity security provides a means of securing high profile or risky data that should be reserved for viewing by a small number of users. This is done by assigning a sensitivity level to the sensitive data. Users will only be permitted to view the secured data if their sensitivity level is higher the data's sensitivity level.

All users, participants, participant notes, and case notes are assigned a sensitivity level. Additional sensitivity security is available for service plans: all contracts, sub-goals, and plan items are assigned sensitivity levels. In order for a user to have access to the specific participant, user, note, contract, subgoal, or plan item fields, the user must have a sensitivity level equal to or higher than the specific data. For example, if a user with a sensitivity level of 3 tries to modify an activity concerning a participant, that participant's sensitivity level must be equal to or less than 3.

Sensitivity levels range from 1 to 5, with 5 being the highest level. The default sensitivity level for all users, participants, participant notes, and case notes is 1.

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## Managing the Organization Structure

### Introduction

This chapter 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 will be 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 a Organization Structure

An organization structure must be created before organization units can be defined for the organization. Once 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 can then be added to the root organization unit.

## Activating the Organization Structure

There can only be one active organization structure at a time. When a structure is activated, an activation date is assigned to the structure. Only an in edit or superseded structure can be activated. Once activated, a organization structure will supersede the previous active organization structure as only one active organization structure can exist at any time. Canceled organization structures cannot be activated.

## Superseding and Canceling the Organization Structure

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

An organization structure can only be deleted if it has a status of in edit or superseded. When an organization structure is in edit, it is not being used, and thus 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 linking 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 as that of the active organization structure. When an organization structure is cloned, the status of that organization structure will be 'In Edit'. The agency can then modify the 'In Edit' organization structure as required without it impacting the existing active structure. Once the agency is satisfied that the 'In Edit' structure is complete, this can be activated. Activating this results in the existing active organization structure being superseded and the previously cloned structure being activated.

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## User Administration

### 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. Information on location based security can be found in the Cúram 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 Cúram 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. Note that a user account cannot be deleted if the user currently holds any role on a case stored on the system.

### **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 on task redirection, see the Cúram 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, it helps an organization to automatically determine whether clients within a case have a requirement for a translator, by comparing the language skills of the case owner of the case to the preferred language of the clients.

## **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. 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.

## **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 supervisor(s) in the organization reporting hierarchy. Organization reporting is described in detail in Chapter 5: Organization Reporting.



## 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 on the supervisor application, see the *Cúram 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.

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## Organization Reporting Administration

### 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 handling such users is to assign them to the lead position of the root organization unit.

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# **General Organization Administration**

## **Introduction**

The tools necessary to administer the organization are accessible from the organization home page. This chapter provides 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 homepage. This summary provides details of the total

number of units, positions and users in the organisation structure, as well as the total number of locations that are maintained for the specific organisation.

## The Organization Homepage

The purpose of the organization home page is to provide access to the tools used to administer organization details including 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 *Cúram 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 having one root location. Additional information maintained for each location includes location holidays, location working patterns, resources, and daily schedules.

Some locations are public offices which are the locations where the public can interact with the organization. All locations have an address. Note, however, there can be multiple locations at the same address. For example, there can be multiple locations 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 detailed information on locations, see the *Cúram Location Administration Guide*.

## Resources

Resources include the tools, equipment, and office spaces that the organization uses to complete its work, e.g., printers, conference rooms. Resources can be assigned to organization locations and organization units. For more information on resources, see the *Cúram 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 includes information on banks and bank branches, currency exchange rates, organization bank accounts, and insurance return periods. There is also 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 perform some banking functions such as personal banking for individuals living near the bank branch. For example, John Smith banks at the 5th Avenue branch of Citibank in NY. A bank branch is identified through a sort code or BIC (if IBAN functionality is enabled).

Organization and participant bank accounts are affiliated with the bank branches set up as part of the financial administration services. For example, John Smith's benefits are paid into his checking account which is assigned to the 5th 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, e.g., 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 have retired to other countries. The base currency of the organization is Euros. John Smith has retired to England where the currency is Sterling. John's weekly payment of €100 converts to £69 using an exchange rate of Euro/GBP 0.6864.

### **Financial Processing Calendar**

There is a separate financial processing calendar for cash, check, EFT, voucher, and invoice delivery methods. Each one of these calendars stores the dates on which the organization will not be able to make payments using the particular delivery method, e.g. they may not be in a position to oversee the completion of batch payment processing. Therefore any payments that fall due on a payment exclusion date should be processed by a previous run of the batch processes. These dates are called payment exclusion dates.

For example, on December 25th (a public holiday), cash payments cannot be made as the organization's offices are not open. December 25th is marked as a payment exclusion date on the financial processing calendar for the cash delivery method. An EFT (electronic funds transfer) 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 will occur on the nearest processing date prior to the payment exclusion date. For example, cash payments due on December 25th will be processed on December 24th, provided December 24th is not a payment exclusion date for cash payments.

### **Insurance Return Periods**

An insurance return period is the period for which the organization bills for contributions from participants. An insurance return is a record of an employer's contributions on behalf of its employee(s) during a specified insurance return period. The insurance return period is defined by a specific start and end date and given a period name. For example, an insurance return period, Year 2005, starts on January 1, 2005 and ends on December 31, 2005.

## **Organization Calendars**

This section provides an overview of organization calendar functionality. This 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 thus will 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 creating a recurring organization activity, the frequency of the activity must be set. They can be managed as an occurrence or per instance. When an administrator makes changes to an occurrence of a recurring activity, he or she can choose to apply it to the occurrence, or to the series.

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

## **Scheduling Location Holidays**

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

For example, an administrator can record a public holiday for December 25th in the location calendar for the Midway office and its sub-locations. This will then be displayed in the calendars of every user at the midway location and sub-locations.

## **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. Functionality for maintaining working patterns at the organization level is the same as the functionality provided for user working patterns.

To summarize, each working pattern covers working hours for a 14-day period starting 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.

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## **Conclusion**

### **Summary**

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

- The application provides the ability 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 means that work can be assigned to the most appropriate users.

- Jobs are the functional roles within an organization and may 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 perform the same job in the organization.
- Every user reports to at least one other user and has his or her 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 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.
- 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 covered in this guide are covered in several related documents:

### **Cúram Participant Guide**

This guide covers the basic concepts of participant functionality.

### **Cúram Integrated Case Management Guide**

This guide covers the basic concepts of case processing.

### **Cúram Evidence Guide**

This guide covers the basis concept of evidence.

### **Cúram Financials Guide**

This guide covers the basic concepts of financial processing.

### **Cúram Deductions Guide**

This guide covers the basic concepts of deduction processing.

### **Cúram Service Planning Guide**

This guide covers the basic concepts of Cúram Service Planning.

### **Cúram Communications Guide**

This guide provides an overview of communication functionality.

### **Cúram Workflow Overview Guide**

This guide provides an overview of the workflow functionality.

### **Cúram Verification Engine Guide**

This guide provides an overview of the Cúram Verification engine.

### **Cúram Location Administration Guide**

This guide provides an overview of location administration in the Cúram Enterprise Framework.

## **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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