Cúram 8.1.3

Location Administration Guide

Note

Before using this information and the product it supports, read the information in Notices on page 21

Edition

This edition applies to Cúram 8.1, 8.1.1, 8.1.2, and 8.1.3.

© Merative US L.P. 2012, 2024

Merative and the Merative Logo are trademarks of Merative US L.P. in the United States and other countries.

Contents

1 Cúram Location Administration Guide

Locations are the work places of the organization's users. Location structures can be maintained by administrators. A location hierarchy of parent-child relationship between locations can be kept. There can be only one active location structure at any time.

1.1 Introduction

Purpose

A high level overview of organization location administration with the Cúram Platform. It describes tools available to administer locations and to maintain the organization's locations, location structures, location security, and resources. One of the main aspects of location administration is the management of the location structure. At a high level, the location structure provides a means of managing the organization's locations and location's resources. More specifically, the location structure allows for the partition of administration functionality related to an organization's locations 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 locations, location security, and the organization's reporting hierarchy. It is assumed the reader has read the *Organization 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 within this guide:

- **1.2 Location Structures on page 10**
  Describes location structures. The chapter describes locations, the location structure, location relationships, and navigating the location structure.

1.2 Location Structures

Introduction

This chapter describes the location structure. A location structure provides a means of managing the organization's locations in a dynamic and logical fashion.

Locations and the Location Structure

The locations of the organization are the work places of its users. Locations can also be public offices 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. All locations also have an operating status which indicates whether or not the location is in use.

The location hierarchy displays the parent/child relationship between locations. Once the location structure has been created, it can be viewed from the location structure home page. Users can also choose to browse the location structure in a tree view. The tree structure allows the relationships between locations to be seen clearly. From both views, locations can be added to the structure. The entire location structure is visible in both the tree structure and the standard application view.

There can be multiple location structures within the organization. However, there can be only one active structure at any time. This allows active and in edit structures to exist simultaneously. A location structure must be activated before it can be used. When a new location structure is activated, it supersedes the existing active structure.

Locations can be secured. Location security limits user access to case and client information based on a comparison of a user's location, the location of their position or positions, and the location of the case/client information. The location of a case is taken as the location of the primary client in the case.

Additional information that can be maintained for each location includes location holidays, resources, and schedules.

Location Administration Security

Locations can be secured so that only specific users can access location administration details. Security identifiers are used to secure administrative details for a location. For more information about location administration security, see .

Understanding the Location Hierarchy

Every location in the organization is represented as part of the organization structure hierarchy. Location relationships are readily apparent when viewed in the tree structure. Parent locations are displayed directly above child locations. The current element of the tree structure is always highlighted. This allows the user to see the related parent and child location, if they exist.

The Root Location

There is one root location per structure in the organization. The root location is always at the top of the location structure. The root location and any location under it can be parent locations. The location hierarchy is used for location security, both at the administration level and the case/client level.

Parent/Child Locations

The hierarchical location structure is used for location security, both at the administration level and the case/client level. A location and it's parent location determine where the location fits into the hierarchy. Any location can have a parent/child relationship with any other location. The location type bears no relation to where a location can be in the hierarchy, and it does not restrict the relationship between locations. It is for informational purposes only.

Navigating the Location Structure

There are two ways to view the location structure: the list view and the tree view. The list view allows a user to see the details of a location structure using tabs. The list items in the Location tab can be expanded to display more information about a location. By default the location 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 location structure includes Home,Tree View, Locations, and Additional Details pages. A user can view the details of any location in the location structure by selecting the relevant location from the Locations tab. The root location can be added or edited using the Additional Details tab. 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 location structure , and is accessed by using the Tree View tab, which is available on the home pages for the locations, sub locations and location structure. Users can view the tree structure and add locations to the structure which when selected, displays the respective home page of the selected element. A location can be expanded to reveal sub locations,if any exist; and collapsed to hide sub locations.

Location structure nodes can be viewed in the tree by selecting to expand the nodes. A user can view the details of any location in the location structure by selecting the relevant location in the

tree. The tree node page includes action menus with links to create schedules for a location, create child locations, assign access to a location, edit the location information, and delete the location.

1.3 Managing the Location Structure

Introduction

This chapter provides information on creating, activating and superseding the location structure. Since the location structure is an important aspect of the organization, it is likely that one will be activated as part of setting up the application. The location structure defines the relationship between the locations in the organization. Location structures can have a status of active, in edit, superseded or canceled.

Creating a Location Structure

A location structure must be created before locations can be defined for the organization. Once a location structure is created, it can be viewed in a tree structure or in a non-tree structure. A new location has a status of in edit until it is activated.

The first component added to the location structure is the root location. Further child locations can then be added to the root location.

Translating Location Names

If your Cúram application supports more than one language, you can add translation text for location names to support users who use that language. You can also modify existing translation text for a location 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 location name in that language by selecting the **Edit** action for the location 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. From the tab navigation bar, click **Structures** > **Location Structures**.
4. Click a location structure name.
5. On the location structure home page, click the **Locations** tab. A list of the organization locations is displayed.
6. Click the location whose name you want to translate.
7. From the location home page, click the Translate Text icon. A list of existing translations for the location name is displayed.
8. Do one of the following:

- Add a new translation.

    1. Click **Add Translation**.
    2. Select the language for the location name translation.
    3. Enter the translation for the location 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 location name text.
    3. Click **Save**.

9. Click **Close**.

Results

The location name is translated with the changes you made everywhere it appears in the application. For example, log in to Cúram as a caseworker and click **Register Person** > **Preferred Office**. The location 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 localization, see the *Web Client Reference Manual*.

Activating the Location 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, the location structure will supersede the previous active location structure as only one active location structure can exist at any time. Canceled location structures cannot be activated.

Superseding and Canceling the Location Structure

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

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

1.4 Location Security

Introduction

An organization may want to limit access to data in the main application e.g., case and client information. The hierarchical location structure is used for for this purpose. The application facilitates location security by providing security configuration options. At the organization level,

location security limits a user's access to client and case information. Location data security can also be configured to allow a user to access locations other than their own.

Location Administration Security

Each location has Create, Read and Maintain SIDs assigned to it. The Create Location SID is the SID that a user must have to create a child location for the location. The Read SID is the SID that a user must have to view administration data within this location and its sub locations. The Maintain SID is the SID a user must have to maintain administration data within this location and its sub locations. Users with maintain SIDs for a location will also be able to view administration data for locations.

Understanding Location Security

Location security checks a user's rights to access information based on the location of case and client information. Location security also checks the location of a user compared to the location of the case owner, if the case owner is a user. In this situation, access will be granted to a user if the user's location is successfully compared to either the location of the case owner or the location of the primary client of the case.

There are two types of location security checks: location data security and product security. The purpose of location data security is to limit user access to case and client information based on user locations. This works by comparing the location of the user (as well as any positions held by the user), and the location of the case/client information. If a user is a case owner or a case supervisor, they will automatically have access to the case irrespective of their location. Where no location has been specified for a client, all users will have access to the client's details and the details of cases for which they are the primary client.

Product location security can be used to further restrict a user's access to cases containing specific products.

Using Location Based Security to authorize User Access

Location Based Security for the application is configured by setting the location data security value on the organization home page. Location data security provides a means to secure sensitive information within an organization. It can be set to Off, On, Restricted View or Read Only.

Setting location data security allows administrators to configure user access to case and client details. Access to case and client information can be secured based on the user's location and the location of the user's position in the organization. When a user attempts to access a case, the user's location and location of the user's position is compared to the location of the case owner, if the case owner is a user. In this situation, access will be granted to a user if the user's location is successfully compared to either the location of the case owner or the location of the primary client of the case.

By setting the location data security level, an administrator can configure a user's access to case and client information in a number of ways:

- If Location Data Security is set to "Off" there are no restrictions on users viewing and maintaining case and client information.
- If Location Data Security is set to "On" users will only be able to view and maintain cases and client information in their own location and sub-locations.
- If Location Data Security is set to "Restricted View" users will be able to see that a case or client exists in other locations but will not be able to view and maintain case or client details outside of their own location.
- If Location Data Security is set to "Read Only" users can view and maintain cases in their own location and sub-locations. Users will be able to view client and case information in other locations, but not maintain them.

The following examples describe how location security allows various levels of access to the different users of the application.

Location Data Security set to 'Off'

When location data security is set to "Off" for an organization, users can view and maintain all cases and all client details irrespective of their location in the organization.

Location Data Security set to 'On'

When location data security is set to "On" for an organization, users can view and maintain all cases and clients in their own location (and sub-locations). users cannot view or maintain any cases or clients which exist in other locations.

Location Data Security set to 'Restricted View'

When location data security is set to "Restricted View" for an organization, users can view and maintain all cases and all clients in their own location (and sub-locations). Users can see that cases and clients exist in other locations but cannot view the details of the cases or clients in these locations.

Location Data Security set to 'Read Only'

When location data security is set to "Read Only" users can view and maintain all cases and clients in their own location (and sub-locations). Users can read the details of other cases and clients in other locations but not maintain them.

Location Data Security set to 'On' with additional access assigned.

When location data security is set to "On" for an organization and the user's location has been assigned additional location access to a location, the user can view and maintain all cases and clients in their own location as well as the additional location and all the child locations of the location. An administrator may also choose to apply the additional location access to all sub-locations, and if so then users in sub-locations of the location granted access can also view and maintain all cases and clients in their own location as well as the additional location. If the user only has read rights for the additional locations then they will only be able to view cases and client information in the additional locations.

This could apply to a location such as a call center. For example, users in a call center location may require additional access to other locations within the organization. An administrator can

assign additional location access to these call center users. Users would then gain rights to the additional locations and any child locations of the additional locations, unless a child location was specifically removed from the list of locations to which a location was being granted access. If a user holds two positions in two different locations, both locations would be considered that users location and as such the user would have access to information in both locations.

Location Data Security set to 'Read Only' with additional access assigned.

When location data security is set to "Read Only" for an organization and the user's location has been assigned additional location access to a location with maintain rights, the user can maintain all cases and clients in their own location as well as the additional location and the child locations of the location. An Administrator may also choose to apply the additional location access to all sub-locations, and if so then the users in sub-locations of the location granted access can maintain all the cases and clients in their own location as well as the additional location. The assignment of additional location access with read rights is not applicable as the user can already view the cases and client information of the other locations.

Location Data Security set to 'Restricted View' with additional access assigned.

When location data security is set to "Restricted View" for an organization and the user's location has been assigned additional location access read and maintain rights to a location, the user can view and maintain all cases and clients in their own location as well as the additional location and the child locations of the location. An Administrator may also choose to apply the additional location access to all sub-locations, and if so then the users in sub-locations of the location granted access can view and maintain all the cases and clients in their own location as well as the additional location. If the user only has read rights for the additional locations then they will only be able to view cases and client information in the additional locations.

Product Security Administration

Product security is another level of security that can be used by the organization to secure information. Cases are secured using a combination of location data security and product SID functionality. Security for cases can be applied on a location only basis, or using a combination of location and product security settings.

For example, when location data security is set to "On", a user will only be able to access cases in their own location and sub-locations. If a product has additional SIDs specified and location data security is set to "On", this may further restrict a user's access to a case in their own location or sub-locations that contains this product.

Products and cases can be secured using any combination of location data security settings and SID functionality, depending on the needs of the organization.

1.5 General Location Administration

Introduction

General location administration functions can be be performed from the location administration home page. This chapter provides information on assigning a resource to a location, maintaining the location holiday calendar, maintaining location daily schedules, and maintaining resources.

Location Resources

Resources include the tools, equipment, and office spaces that the organization uses to complete its work, e.g., printers, conference rooms. Location resources are resources specific to a location, e.g., location printer 1, location photocopier 2. The types of resource that can be assigned to a location are configurable.

Existing resources can be assigned to a location. Resources can also be applied to multiple locations. Only active and operating resources are available to be assigned. A location cannot be deleted if it has an active resource. Resources that are applied to a location can also be applied to its child locations.

Resources have parameters. A resource parameter could be a technical address, e.g., the network address for a printer. A parameter could also be the serial code on a mobile phone. Parameters are flexible depending on the resource type.

Users must have sufficient location administration rights to view and maintain a resource. A user will not be able to assign a resource to a child location without sufficient maintain rights for that child location.

Location Holiday Calendar

Holidays can be assigned to locations. A location holiday calendar keeps a record of days on which the location is closed. Holidays are maintained at the location level because different locations may observe different holidays.

Users must have sufficient location administration rights to view and maintain a location holiday calendar. A user will not be able to assign a location holiday to a child location without sufficient maintain rights for that child location.

Location Daily Schedules

Daily schedules are the set of daily time periods for a specific location during which work can be scheduled at that location. When creating a daily schedule, a type must be provided to define the type of work that can be scheduled using the daily schedule, e.g. an appeals hearing or a client self scheduled appointment. A daily schedule consists of a number of slots. These slots define a period of time during a day. Each slot allocation defines the number of work items that can be processed at a location during a set time period (slot). Positions are assigned to a daily schedule. These are the positions available for work scheduling during the slot's time period. Users assigned to these positions then become the users available to perform the work items during the time slot for the daily schedule

For example, the organization conducts benefit application interviews at the location, 21 State Street that can be scheduled on-line by clients. The working day is eight hours with one hour for

lunch and interviews take an average of 50 minutes. Seven one-hour slots are therefore available each day. Four users are assigned to the daily schedule via their position assignment and so 28 (four users by seven slots) interviews can be scheduled each day with these users.

Users must have sufficient location administration rights to view and maintain a location daily schedule.

An administrator can also add translation text for location schedule slot names to support users who use that language.

Translating Location Schedule Slot Names

If your Cúram application supports more than one language, you can add translation text for location schedule slot names to support users who use that language. You can also modify existing translation text for a location schedule slot 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 location schedule slot name in that language by selecting the **Edit** action for the location schedule slot 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. From the tab navigation bar, click **Structures** > **Location Structures**.
4. Click a location structure name.
5. On the location structure home page, click the **Locations** tab. A list of the organization locations is displayed.
6. Click a location name.
7. On the location home page, click the **Location Schedules** tab. The organization location's schedule is displayed.
8. Expand the location schedule and locate the location slot whose name you want to translate.
9. Click the Translate Text icon. A list of existing translations for the location schedule slot name is displayed.
10. Do one of the following:

    *   Add a new translation.

        1. Click **Add Translation**.
        2. Select the language for the slot name translation.
        3. Enter the translation for the slot 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 slot name text.
        3. Click **Save**.

11. Click **Close**.

Results

The location schedule slot name is translated with the changes you made everywhere it appears in the application. For example, log in to Cúram Management as a caseworker and from an appeal hearing case, click **Schedule Hearing**. The location schedule slot 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 localization, see the *Web Client Reference Manual*.

Location Working Patterns

Location working patterns are the working patterns of the organization's locations. Functionality for maintaining location working patterns is similar to that for maintaining organization working patterns. A standard location working pattern can be created to define the working hours for each day within a 14-day period starting on Monday and finishing 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.

There may be some days that do not fall into a standard working pattern. For example, a rural or satellite office may only operate 3 days a week or daily between the hours of 2.00 PM to 5.00 PM. These days can be recorded as non-standard working days and can be recorded for one or more days within the 14 day period. Individual days within a location working pattern can be specified as default, non-standard, and non-working.

Location working patterns can be specified as a working hours type or as a public opening hours type. The public opening hours working pattern type defines the hours a public office location is open for business to the public over a 14 day period. Only one active working pattern for each working pattern type is allowed in any given period.

1.6 Conclusion

Summary

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

- The location structure is used to manage the organization's locations.
- The location structure has a lifecycle which includes creating, activating, superseding and canceling the location structure.
- A user's access to case and client information can be limited depending on that user's location and position within the organization.
- Location resources, location holidays, and location daily schedules can be maintained as part of general location administration.
- Location security allows an organization to limit access to case and client information. It also allows a users access to locations other than their own to be restricted as necessary.

- Location administration security allows the organization to limit access to the administration of locations.

Additional Information

Additional information on the topics covered in this guide are covered in several related guides:

- ***System Administration Guide***
  Covers the basic concepts of system administration.
- ***Organization Administration Guide***
  Covers the basic concepts of organization administration functionality.
- ***Participant Guide***
  Covers the basic concepts of participant functionality.
- ***Integrated Case Management Guide***
  Covers the basic concepts of case processing.

Notices

Permissions for the use of these publications are granted subject to the following terms and conditions.

Applicability

These terms and conditions are in addition to any terms of use for the Merative website.

Personal use

You may reproduce these publications for your personal, noncommercial use provided that all proprietary notices are preserved. You may not distribute, display or make derivative work of these publications, or any portion thereof, without the express consent of Merative

Commercial use

You may reproduce, distribute and display these publications solely within your enterprise provided that all proprietary notices are preserved. You may not make derivative works of these publications, or reproduce, distribute or display these publications or any portion thereof outside your enterprise, without the express consent of Merative.

Rights

Except as expressly granted in this permission, no other permissions, licenses or rights are granted, either express or implied, to the publications or any information, data, software or other intellectual property contained therein.

Merative reserves the right to withdraw the permissions granted herein whenever, in its discretion, the use of the publications is detrimental to its interest or, as determined by Merative, the above instructions are not being properly followed.

You may not download, export or re-export this information except in full compliance with all applicable laws and regulations, including all United States export laws and regulations.

MERATIVE MAKES NO GUARANTEE ABOUT THE CONTENT OF THESE PUBLICATIONS. THE PUBLICATIONS ARE PROVIDED "AS-IS" AND WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESSED OR IMPLIED, INCLUDING BUT NOT LIMITED TO IMPLIED WARRANTIES OF MERCHANTABILITY, NON-INFRINGEMENT, AND FITNESS FOR A PARTICULAR PURPOSE.

Merative or its licensors may have patents or pending patent applications covering subject matter described in this document. The furnishing of this documentation does not grant you any license to these patents.

Information concerning non-Merative products was obtained from the suppliers of those products, their published announcements or other publicly available sources. Merative has not tested those products and cannot confirm the accuracy of performance, compatibility or any other claims related to non-Merative products. Questions on the capabilities of non-Merative products should be addressed to the suppliers of those products.

Any references in this information to non-Merative websites are provided for convenience only and do not in any manner serve as an endorsement of those websites. The materials at those

websites are not part of the materials for this Merative product and use of those websites is at your own risk.

This information contains examples of data and reports used in daily business operations. To illustrate them as completely as possible, the examples include the names of individuals, companies, brands, and products. All of these names are fictitious and any similarity to actual people or business enterprises is entirely coincidental.

The licensed program described in this document and all licensed material available for it are provided by Merative under terms of the Merative Client Agreement.

COPYRIGHT LICENSE:

This information contains sample application programs in source language, which illustrate programming techniques on various operating platforms. You may copy, modify, and distribute these sample programs in any form without payment to Merative, for the purposes of developing, using, marketing or distributing application programs conforming to the application programming interface for the operating platform for which the sample programs are written. These examples have not been thoroughly tested under all conditions. Merative, therefore, cannot guarantee or imply reliability, serviceability, or function of these programs. The sample programs are provided "AS IS", without warranty of any kind. Merative shall not be liable for any damages arising out of your use of the sample programs.

Privacy policy

The Merative privacy policy is available at https://www.merative.com/privacy.

Trademarks

Merative ™ and the Merative ™ logo are trademarks of Merative US L.P. in the United States and other countries.

IBM®, the IBM® logo, and ibm.com® are trademarks or registered trademarks of International Business Machines Corp., registered in many jurisdictions worldwide.

Adobe™, the Adobe™ logo, PostScript™, and the PostScript™ logo are either registered trademarks or trademarks of Adobe™ Systems Incorporated in the United States, and/or other countries.

Oracle and Java are registered trademarks of Oracle and/or its affiliates.

The registered trademark Linux® is used pursuant to a sublicense from the Linux Foundation, the exclusive licensee of Linus Torvalds, owner of the mark on a worldwide basis.

Microsoft™, Windows™, and the Windows™ logo are trademarks of Microsoft™ Corporation in the United States, other countries, or both.

UNIX™ is a registered trademark of The Open Group in the United States and other countries.

Other company, product, and service names may be trademarks or service marks of others.