# Organisational management in PEBBLES

# Technical Specification

# V0.36

| **Version Number** | **Sections changed** | **Reason** |
| --- | --- | --- |
| 0.22 | Reporting / Data segregation | Amend ‘scheme’ to ‘business unit’ for clarity and consistency |
| 0.23 | New Section added QL Finance Cost Centre creation | To populate Cost Centre functionality to allow finance to filter by Org Hierarchy within the Grid |
| 0.24 | Removal of QL Finance Cost Centre Creation  Amend reporting section | Project decision not to go ahead as of limited value  Revisions to flattened hierarchy tables for consistency |
| 0.25 | 1) Updating u\_version section added  2) Names of 1st Touch Hierarchy tables  3) Functional workgroups and Data Segregation sections updated to only include workgroups that actually exist. | Correct process for updating tables.  Prevent incorrect workgroup names being used. |
| 0.26 | Audit section added |  |
| 0.27 | 1st Touch HC21\_Schemes added | CSV population of user profile |
| 0.28 | ‘Reporting’ updated - surveyor Hierarchy tables to be added to QL, DW & 1st Touch DW.  HC21.H21\_surv\_hierarchy  HC21.SurvHierarchy | For Asset Management reporting purposes |
| 0.29 | Additional tables to be updated in QL  hrartamt  hgmclent | Data segregation purposes |
| 0.30 | New section ‘Sales Ledger’  Additional table to be updated in QL  acpmast  Removal of User\_Schemes from 1st Touch user properties – field incapable of holding values | Patch, used to divide work between Sales Ledger officers |
| 0.31 | Property Hierarchy, Surveyor Hierarchy | Updating of desn field when only it changes |
| 0.32 | Data Segregation for reporting, Data segregation in 1st Touch | Addition of ‘buddy courts’ to user business units. |
| 0.33 | Organisational Hierarchy in ResourceLink, Reporting | Addition of OBS\_DATE from D100M into hc21\_org\_hierarchy. To show when business unit codes became obsolete, e.g. sold, contract lost, etc. |
| 0.34 | Addition of surveyor business unit table section under 1st Touch tables | Added to allow surveyor access to be regional, for performance purposes |
| 0.35 | Line Management Table | Change functionality to use line manager’s manager when line manager is vacant. Removal of unnecessary reference to TaskCentre. |
| 0.36 | User role table, List of Tables to be created  Surveyor Business Units | QL Officer roles are embedded in property table, and do not allow more than one user per post. This table will simplify reporting and integration.  Surveyor Business Units section moved unchanged. |

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# Overview of Hierarchies, Authorisations, Escalation & Data Segregation

The aims of the PEBBLEs project include the desire to: -

* Enable front line staff to directly enter data and remove the need to re-key
* Improve Management Information and reporting consistency
* Automate process steps where possible
* Meet GDPR requirements of restricting personal data access to only that required for the job role
* Minimise back office staff overhead

Early on it was seen that a key way to do this was by removing duplication of organisational and staff data across systems, and using the HR system (ResourceLink) as the sole source system for Organisational & staff related data. This process had already begun before PEBBLEs with this data being used in Active Directory, Wilma and the Who’s Who.

## Data in ResourceLink

ResourceLink is a well-structured database, with ability to add user defined data fields where required. The following are relevant parts of the data: -

### Organisation Hierarchy

Managed by a graphical tool, the organisation hierarchy allows a typical tree view of the business units within an organisation - directorates, departments etc. It is independent of the individual posts within the organisation and so allows for the existence of organisation units that have no staff – either permanently or temporarily. There is often more than one post in each business unit, and therefore there may be manager-subordinate relationships within these that are not defined in this structure.

### Posts

Actual jobs, these are attached onto the organisational hierarchy in the appropriate place. The post could be held by more than one individual, e.g. a job-share. User defined fields at post level will be used to hold information about the post for use by other systems – e.g. QL role, Financial authorisation limits, QL Workgroups

### Post-to-Post Hierarchy

This defines which post line manages each post. It comprehensively defines the line management arrangements of the organisation, but does only allow for one line-management post for each post. This is unlikely to cause a significant problem.

### Employees

Each employee has one or more posts. Against each employee record the Active Directory (Windows Login) username is held, which forms the link to Active Directory and other systems. It is important not to hold information at employee level that should be held against the post, and vice-versa.

## Organisational Data in QL

There are several places in QL where organisational and user data is stored. There will be routines created that updates these with the latest data from ResourceLink each night. Further details are found below.

### Property Records

Against each scheme and property records such as region, patch etc are held, along with who is responsible for certain activities in relation to that property.

### Workgroups

Workgroups are user roles in QL – they define what functional parts of the system users can access, and also data segregation e.g. which patches a user can access. Users are members of one or more Workgroups, one of which is the default Workgroup, i.e. the one they are logged in as when the first go into QL. A user only gets access to the functional parts of the system for the Workgroup they are logged into, if they have more than one Workgroup they need to change Workgroup to use different parts of the system. Data segregation is valid for all Workgroups, whether logged in or not.

## Further considerations required

There are certain facets of the configuration that need further consideration as to the implications of the design. Areas remaining unresolved so far include: -

#### Oldham

Oldham has a different structure and operating model. A separate piece of analysis will need to be done in relation to this. In view of the size and limited changes a more manual approach to updates may be desirable

# Pre-requisite supporting data required in systems

## ResourceLink

* Agency employees need to be held in ResourceLink and attached to the relevant post.
* All employees with a computer account must have their AD username in ResourceLink.
* Post to Post Hierarchy must be complete and unbroken.
* The three new fields, QL role, QL workgroups, QL WO Limit must be populated for each role that will use PEBBLEs.
* QL Roles are as follows: -
  + Court Manager
  + Patch Manager
  + Property Services Manager
  + Surveyor
  + Assistant CM
  + Regional Admin
  + Head Of
* QL Workgroups are as follows: -
  + HOUSING OPERATIONS
  + tbc
* QL WO Spend limits are as follows: -

|  |  |
| --- | --- |
| CM’s | £750 |
| Housing Manager | £10K |
| Head of Service | £100K |
| Asset Mgmt. Admin | £100K |
| Asset Mgmt. Senior | £300K |
| Director | £500K |
| COO / CEO | £1m |
| Other Roles | N/A |

* Where a court manager manages more than one court they must have a post for each court. Only the main post will contain financial information, but all posts must have the QL role field completed.
* Full Organisation Structure, with at least one Structure Unit for each Scheme / GL Business Unit.
  + Each structure unit must have a SHORT\_DESC that matches the scheme code/ GL Business Unit. The SHORT\_DESC for patches must match the QL Data Segregation Workgroup for that patch.
  + The LONG\_DESC for each structure unit should match QL
  + Every court must have a post attached that has the QL role court manager, and someone in that post
  + Every patch must have a post attached that has the QL role patch manager, and someone in that post
  + Every region must have a post attached that has the QL role region manager, and someone in that post
* Full Surveyor Organisation structure, containing all courts, surveyor patches, etc.
  + Each structure unit must have a SHORT\_DESC that matches the scheme code/ GL Business Unit
  + The LONG\_DESC for each structure unit should match QL
  + Every surveyor patch must have a post attached, that has the role surveyor, and someone in that post
  + Every surveyor region must have a post attached, that has the role Property Service Manager, and someone in that post

## QL

* Each user needs to be manually set up as a user in the system
* The AD username must be input for each user
* A responsible person record needs to be set up for each user, with the same name as the QL username
* The responsible person / user cross-reference needs to be completed.
* The workgroups need to be set up
* The QL Data Segregation Workgroup name for patches must match the RL SHORT\_DESC for that patch.

## 1st Touch

* The users need to be set up, complete with AD username

## Useful Technical Information

#### Organisation Hierarchy in ResourceLink

Further analysis is needed to understand fully the tables and relationships required and the optimal way of using them. The Stored Procedure GET\_RESOURCELINK\_EMPLOYEE\_DATA contains much of the relationship data and logic required to extract the information, and the code for this can be partially re-used.

The organisation hierarchy in ResourceLink is in table D126M. There is more than one hierarchy in this table, the one needed in this case is called “PERS”

SELECT [HIERARCHY\_ID]

,[FATHER\_HIERARCHY\_LEVEL\_NO]

,[FATHER\_STR\_ID]

,[FATHER\_STR\_REF]

,[HIERARCHY\_LEVEL\_NO]

,[STR\_ID]

,[STR\_REF]

FROM [H21\_STAGING].[dbo].[RAW\_D126M]

WHERE [HIERARCHY\_ID] like 'PERS'

The parent-child relationship is between STR\_REF and FATHER\_STR\_REF.

Hierarchy tiers go up in 10’s, i.e. Top level is 10, next 20 etc. The lowest level (Court) is 80.

Additional information on Structure Units is to be found in table D100M, joining on D100M.REF to D126M.STR\_REF.

D100M includes the following fields: -

[ID]

[LONG\_DESC]

[SHORT\_DESC]

[OBS\_DATE]

LONG\_DESC contains the Court or Department name, at present both ID and SHORT\_DESC contain the level 5 code for courts, and a short description for corporate. The ID functions as a GUID, so although ID generally contains a short description (which can still be the level 5 / business unit code if appropriate) it is not really used other than as a reference. SHORT\_DESC will contain the Business Unit/Scheme code. Where sub-structures are part of the same Business Unit the ID will be unique even though the Business Unit will not be.

SHORT\_DESC will therefore form the link to QL, matching Business Unit in the finance system and Scheme in housing.

OBS\_DATE is used to identify when a business unit code becomes obsolete, e.g. sold, contract lost, etc.

Post details are found in D200M, D500M, D550M, D580M this includes Job Title, [LONG\_DESC].

The field [NUMBER\_R] in D200M is the post number referenced against employees, e.g. the view D455V references this as [POST\_NUMBER].

#### AD username in ResourceLink

AD username is in table D970M. This table is used for multiple purposes, so the following is required to link to the employee

WHERE SCREEN\_REF = 'MD55S3' AND FIELD\_REF = '01000140'

ON D970M.DATA\_KEY\_ID = D1048M.PERSON\_REF

The AD username is in field DATA\_VALUE

#### Post to Post Hierarchy in ResourceLink

D228M is used to identify the post that line manages another. It contains both child and parent relationships, identified by the field [POST\_RELATIONSHIP]. Linked to D200M by the fields [POST\_REF1] and [POST\_REF2]. Forms a simple parent child hierarchy if WHERE [POST\_RELATIONSHIP] like 'R' is used, with [POST\_REF1] as children and [POST\_REF2] as parent.

The hierarchy ID will be ‘PERS’

#### User tables in QL

In QL the main table of users is [menuser]. This holds QL username [user\_id], User’s name [name], and default workgroup [group\_id].

The QL table [menldapuser] is the link between QL username [ql\_user] and AD username [ldap\_user].

A list of workgroups is held in [menwrkgp].

QL works order authorisation limits are held in table [hpmspend], this will also need to be updated nightly along with QL purchase order authorisation limits held in table [popspend].

# Specifications

## Updating u\_version

Where we are inserting data into the QL standard tables we need to ensure that the u\_version column is initialised with an ACSII value of between 34 (“) and 126(~), where we are updating existing data the following CASE expression can be used: -

CASE WHEN ASCII(u\_version) >= 33 AND ASCII(u\_version) <= 125 THEN CHAR(ASCII(u\_version) +1)

     WHEN ASCII(u\_version) = 126 THEN CHAR(33)

ELSE CHAR(34)

END

## Property Hierarchy

The property hierarchy fields are as follows: -

[hgmprty1].[sch\_id] Scheme

[hgmprty2].[alt\_desc] Business Stream

[hgmprty2].[region\_cd] Region

[hgmprty1].[ha\_rep\_cd] Patch

Population of the fields are all based on the Organisational hierarchy from ResourceLink where [hgmprty1].[sch\_id] = D100M.SHORT\_DESC defines the Level 70 Business Unit (Court).

In addition to the individual property records there is also a scheme information table [hpdscrec]

This table holds the scheme description, [scheme\_desn], as well as the region, [region\_cd]. The primary key is the scheme code, [scheme\_cd]. The region code should be updated

The value to be used to populate the field is based on the hierarchy level in D126M: -

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Field | category\_id in cmpgencd | Friendly Name | Hierarchy Level | RL Field to use |
| [hgmprty1].[sch\_id]  also  [hpdscrec].[scheme\_cd] | n/a | Scheme | 80 | [SHORT\_DESC] used to join, not update |
| [hgmprty1].[ha\_rep\_cd] | 'HA\_AREA' | Patch | 70 | [SHORT\_DESC] |
| [hgmprty2].[region\_cd]  also  [hpdscrec].[region\_cd] | 'REGION\_CD' | Region | 60 | [SHORT\_DESC] |
| [hgmprty2].[alt\_desc] | n/a | Business Stream | 40 | [LONG\_DESC] |
| [hgmprty3].[extra7\_c001] | 'EXTRA7\_C01' | Sub Business Stream | 50 | [SHORT\_DESC] |

Drop downs & Descriptions

[cmpgencd] will also need to be updated at this point

Add the distinct new values. Only add those that don’t currently exist, so we can later choose not to remove existing values if required.

INSERT INTO [cmpgencd]

[mod\_id] 'HSG'

,[category\_id] 'REGION\_CD'

,[code\_id] Region – level 60 - D100M.Short\_Desc

,[u\_version] $

,[desn] Region – level 60 - D100M.Long\_Desc

INSERT INTO [cmpgencd]

[mod\_id] 'HSG'

,[category\_id] 'HA\_AREA'

,[code\_id] Patch – level 70 - D100M.Short\_Desc

,[u\_version] $

,[desn] Patch – level 70 - D100M.Long\_Desc

INSERT INTO [cmpgencd]

[mod\_id] 'HSG'

,[category\_id] 'EXTRA7\_C01'

,[code\_id] Sub Business Stream – level 50 - D100M.Short\_Desc

,[u\_version] $

,[desn] Sub Business Stream – level 50 - D100M.Long\_Desc

Also update existing records where the description has changed, i.e. the [mod\_id], [category\_id] and [code\_id] already exist as per above, but the [desn] is different.

### Client & Rent Account Tables

The organisation hierarchy will also be used to update the client and rent account tables.

[hrartmt2].[ha\_rep\_cd] Patch

[hrartmt2].[region\_cd] Region

[hgmclent].[ha\_rep\_cd] Patch

[hgmclent].[region\_cd] Region

To get the property join [hrartmt2].[rent\_acc\_no] = [hratency].[rent\_acc\_no]

WHERE

[tency\_end\_dt] > getdate() OR

[tency\_end\_dt] is null

## Surveyor Hierarchy

New hierarchy to be created using existing functionality as per Organisation Hierarchy, with hierarchy\_id of ‘SURV’ (tbc). There are 8 levels to match the main ‘PERS’ structure, although the top levels are just ‘padding’. Surveyor Region (6), Surveyor Patch (7) and Scheme (8)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Field | category\_id in cmpgencd | Friendly Name | Hierarchy Level | RL Field to use |
| [hgmprty1].[sch\_id] | n/a | Scheme | 8 | [SHORT\_DESC] used to join, not update |
| hgmprty1.[oth\_rep\_cd1] | 'OTH\_REP1' | Surveyor Patch | 7 | [SHORT\_DESC] |
| hgmprty1.[oth\_rep\_cd2] | 'OTH\_REP2' | Surveyor Region | 6 | [SHORT\_DESC] |

[cmpgencd] will also need to be updated at this point

Add the distinct new values. Only add those that don’t currently exist, so we can later choose not to remove existing values if required.

INSERT INTO [cmpgencd]

[mod\_id] 'HSG'

,[category\_id] 'OTH\_REP1'

,[code\_id] Surveyor Region – level 60 - D100M.Short\_Desc

,[u\_version] $

,[desn] Surveyor Region – level 60 - D100M.Long\_Desc

INSERT INTO [cmpgencd]

[mod\_id] 'HSG'

,[category\_id] 'OTH\_REP2'

,[code\_id] Surveyor Patch – level 70 - D100M.Short\_Desc

,[u\_version] $

,[desn] Surveyor Patch – level 70 - D100M.Long\_Desc

Also update existing records where the description has changed, i.e. the [mod\_id], [category\_id] and [code\_id] already exist as per above, but the [desn] is different.

## Officer Fields

The ‘Officer fields’ are to be populated with the ‘Responsible Person’ – this is not the same as the user, but is obtained from the table [hgmrpxrf]. This table is designed to cross-reference [cmppers] with [menuser] / [menldapuser]

[hgmrpxrf].[comp\_id]

[hgmrpxrf].[resp\_pers] Responsible Person

[hgmrpxrf].[u\_version]

[hgmrpxrf].[user\_id] User ID

[hgmrpxrf].[spare\_bool]

[hgmrpxrf].[spare\_1]

[hgmrpxrf].[spare\_2] (Line Manager)

| **QL Current** | **Table.Field** | **Hierarchy** | **Proposed Use** | **UDF content** |
| --- | --- | --- | --- | --- |
| Housing Manager | hgmprty1.hsg\_mgr | PERS | Court Manager | CM |
| Housing Officer | hgmprty1.hsg\_off | PERS | Patch Manager | PATCH |
| Repairs Officer | hgmprty1.rep\_off | SURV | Property Services Manager | OFF |
| Development Officer | hgmprty1.dev\_off | SURV | Surveyors | SURV |
| Other Officer | hgmprty1.oth\_per1 | PERS | Assist CM's | ACM |
| Other Officer | hgmprty1.oth\_per2 | PERS | Regional Admin | REGION |
| Other Officer | hgmprty1.oth\_per3 | PERS | Head Of's | HEAD |

The fields in ResourceLink used to identify which post has which role will be newly created UDFs, held against each post.

The UDF contains 3 fields –

QL Role (inc. N/A)

QL Workgroup

QL Spend limit

#### High level process of populating officer fields

QL Property ID QL.hgmprty1.prty\_id

↓

QL Scheme ID QL.hgmprty1.sch\_id

↓

RL ResourceLink Business Unit (Court) RL.D100M.SHORT\_DESC

↓

RL Posts attached to business unit

↓

RL UDF to identify post with correct QL role, e.g. Court Manager

↓

RL Employee ID of person in post

↓

RL Active Directory Username of employee

↓

QL username [menldapuser].[ql\_user]

↓

QL Responsible person [hgmrpxrf].[resp\_pers]

↓

Insert QL Responsible person against e.g. ‘Court Manager’ field in QL Property table HGMPRTY\_1

QL.hgmprty1.hsg\_mgr

## Line Management Table

Table [hgmrpxrf] in QL will be used for Workflow. The line manager (QL username?) will be input in field [spare\_2]. When the line manager is empty, then the line manager’s line manager will be used instead, if available.

The mapping process to identify users line manager is as follows: -

QL username in [hgmrpxrf]

↓

QL AD username from menldapuser

↓

RL AD username is in D970M.DATA\_VALUE WHERE SCREEN\_REF = 'MD55S3' AND FIELD\_REF = '01000140'

↓

RL Employee D970M.DATA\_KEY\_ID = D1048M.PERSON\_REF

↓

Main RL Post held by employee

↓

RL Post-to-Post Hierarchy D228M

↓

RL Post of line manager

↓

RL Employee in line manager post

↓

RL AD username of employee in manager post

↓

QL username matching AD username of manager from menldapuser

↓

Update QL line management table with QL username (?) of manager [hgmrpxrf].[spare\_2]

## Functional Workgroups

Which workgroups each user has access to is defined in the table [menugrp]. This is a simple two-column table of QL username, [user\_id] and workgroup [group\_id] , with a record for each user/workgroup combination allowed. In addition the default workgroup, [menuser].[group\_id] needs to be populated.

QL AD username from menldapuser

↓

RL AD username D970M.DATA\_VALUE WHERE SCREEN\_REF = 'MD55S3' AND FIELD\_REF = '01000140'

↓

RL Employee D970M.DATA\_KEY\_ID = D1048M.PERSON\_REF

↓

RL Post(s) held by employee

↓

RL User defined fields holding workgroup

↓

QL Workgroup(s) required & default Workgroup (default is 1st record)

↓

Update QL User/Workgroup table [menugrp].[group\_id] and default workgroup [menuser].[group\_id] where group\_id exists in [menwrkgp], the master list of workgroups.

## Authorisation Limits

Against each user in QL is an ‘Authorisation Limit’ that defines the Maximum value of Works Order that can be raised. [hpmspend].[spend\_limit]

There is an additional table that identifies Purchase Order spend limits, [popspend].

The following will need to be created / updated [popspend].[user\_id],[popspend].[spend\_limit]

If created then defaults will need to be included for comp\_id and u\_version.

The mapping process to identify which limits are given to which users is as follows: -

QL username / AD username from menldapuser

↓

RL AD username D970M.DATA\_VALUE WHERE SCREEN\_REF = 'MD55S3' AND FIELD\_REF = '01000140'

↓

RL Employee D970M.DATA\_KEY\_ID = D1048M.PERSON\_REF

↓

RL Post(s) held by employee

↓

RL User defined fields holding Authorisation Limit

↓

QL Authorisation Limit required

↓

Update QL Authorisation Limit table [hpmspend].[spend\_limit] , [popspend].[spend\_limit]

## Data Segregation Workgroups in QL

Due to QL limitations, there is a need for two sets of data segregation workgroups to be created. This is because although some sections of the system can be locked down to Patch level, other can only be restricted down to Region level.

QL username / AD username from menldapuser

↓

RL AD username D970M.DATA\_VALUE WHERE SCREEN\_REF = 'MD55S3' AND FIELD\_REF = '01000140'

↓

RL Employee D970M.DATA\_KEY\_ID = D1048M.PERSON\_REF

↓

RL Post(s) held by employee

↓

RL Organisation Hierarchy

↓

1. RL Organisation Hierarchy up one level from where post is attached, then down to all Patches – (Level 6) under that level.
2. RL Organisation Hierarchy up one level from where post is attached, then down to all Regions (Level 5) under that level, or up to the Region if below that level.

↓

RL Business Unit Codes SHORT\_DESC

↓

QL Workgroup for Court Access

↓

Update QL User/Workgroup table [menugrp].[group\_id] with all groups for the user where group\_id exists in [menwrkgp], the master list of workgroups.

# Reporting

SSRS is used to report from both QL, the Data Warehouse and from 1st Touch.

The org (PERS) and surveyor (SURV) hierarchy tables will therefore be flattened and available within all three databases, as well as in the HR reporting solutions. Hierarchy data held at property level will be visible within the QL grid for filtering / grouping etc.

The flattened org hierarchy tables will be created with the following columns: -

[hierarchy\_id]

[board\_code]

[board\_desc]

[executive\_code]

[executive\_desc]

[directorate\_code]

[directorate\_desc]

[business\_stream\_code]

[business\_stream\_desc]

[sub\_business\_stream\_code]

[sub\_business\_stream\_desc]

[region\_service\_code]

[region\_service\_desc]

[patch\_code]

[patch\_desc]

[business\_unit\_code]

[business\_unit\_desc]

[obsolete\_date]

The flattened surveyor hierarchy tables are the same as the org tables, but using the following column names: -

[hierarchy\_id]

[AM1\_code]

[AM1\_desc]

[AM2\_code]

[AM2\_desc]

[AM3\_code]

[AM3\_desc]

[AM4\_code]

[AM4\_desc]

[AM5\_code]

[AM5\_desc]

[AM\_region\_code]

[AM\_region\_desc]

[AM\_patch\_code]

[AM\_patch\_desc]

[AM\_scheme\_code]

[AM\_scheme\_desc]

These tables contain 1 line per business unit code. Where there is more than 1 instance of this code in the RL hierarchy (e.g. due to a day centre) the following action is taken to ensure only a single row is created: -

* Concatenate the long descriptions, truncate length if required
* Use the hierarchy structure for the structure unit with lowest id. This is somewhat arbitrary, but it should be the same for both anyway and this prevents duplication errors

## User Role Table

This is a new table under the HC21 Schema, [HC21.H21\_users\_roles]. Using a similar process to that used for populating officers into the hgmprty1 table it contains the AD username, QL Role from UDF, and the scheme the user’s post is attached to. Each AD username may appear more than once, and more than one AD username may exist for a specific role at a court, e.g. a scheme may have two line managers due to job sharing, etc.

## Surveyor Business Units

Although not strictly speaking reporting or data segregation, for performance purposes there has been identified the need to restrict the number of courts for each surveyor.

A new table HC21.SurveyorBusinessUnits will be created in 1st Touch, identical to the HC21.UserBusiness Units table, but populated from the surveyor hierarchy (SURV) rather than the organisational hierarchy (PERS). The methodology used for populating it is identical, other than the hierarchy used.

## List of Tables to be created

Tables will be created in QL & 1st Touch DW and the main DW as follows: -

[HC21.H21\_user\_business\_units] AD username / Permitted Business Units

[HC21.H21\_org\_hierarchy] Flattened org structure from RL

[HC21.H21\_surv\_hierarchy] Flattened surveyor structure from RL

[HC21.H21\_finance\_org\_hierarchy] View that modifies org structure from RL to meet specific

[HC21.H21\_activity\_hierarchy] Flattened activity hierarchy

[HC21.H21\_nominal\_hierarchy] Flattened nominal hierarchy

[HC21.H21\_company\_hierarchy] Flattened company hierarchy

[HC21.H21\_users\_roles] AD username, QL Role, Scheme

1st Touch

HC21.OrgHierarchy Flattened org structure from RL

HC21.SurvHierarchy Flattened surv structure from RL

HC21.UserBusinessUnits AD username / Permitted Business Units

HC21.CompanyHierarchy Flattened company hierarchy

HC21.ActivityHierarchy Flattened activity hierarchy

HC21.NominalHierarchy Flattened nominal hierarchy

## Data Segregation for reporting

Data segregation is achieved by two methods: -

* Restricting access to only relevant reports by AD group
* Restricting access within a report by use of appropriate logic based on permitted schemes / business units. This will be achieved by the use of the table [hc21\_user\_business\_units] containing the AD username and business unit code. For each business unit that a user is granted access there will be one record. As per agreed specification the user will be granted access to all their peer’s business units, i.e. all of the business units that are under the hierarchy unit one level above where their own post is attached.
* In addition to the business units granted from the hierarchy, the fields hgmprty1.oth\_prty\_id1 and hgmprty1.oth\_prty\_id2 are used to hold ‘buddy’ courts. The court manager will also have these courts added to all user business unit tables.

# Audit records

In order to maintain an audit trail of QL changes it is necessary to update the relevant QL audit tables with any changes. In order to prevent rapid bloat of the audit tables only changes should be recorded.

[hgmpaud1]

[hgmpaud2]

[hgmpaud3]

In addition some new audit tables need to be created in the data warehouse to log changes to QL users, covering changes to the following :-

[cmpgencd]

[hgmrpxrf].[spare\_2] Line Manager

[menugrp].[group\_id] QL Workgroups

[menuser].[group\_id] Default workgroup

[hpmspend].[spend\_limit] WO Spend limit

[popspend].[spend\_limit] PO Spend limit

# Sales Ledger

In order to split workload between Sales Ledger officers the field [acpmast].[area\_id] will be populated with Patch, where [ledger\_id] equal to ‘SL1’, based on the scheme code which is found in [acpmast].[category\_id]. (The latter is completed manually as part of the setup of sales ledger records.)

# Summary of tables to be updated

## QL Tables

[hgmprty1].[sch\_id] Scheme

[hgmprty2].[alt\_desc] Business Stream

[hgmprty3].[extra7\_c001] Sub Business Stream

[hgmprty2].[region\_cd] Region

[hgmprty1].[ha\_rep\_cd] Patch

[hpdscrec].[region\_cd] Region

[hgmprty1].[oth\_rep\_cd1] Surveyor Patch

[hgmprty1].[oth\_rep\_cd2] Surveyor Region

[hgmprty1].[hsg\_mgr] Court Manager

[hgmprty1].[hsg\_off] Patch Manager

[hgmprty1].[rep\_off] Property Services Manager

[hgmprty1].[dev\_off] Surveyor

[hgmprty1].[oth\_per1] Assistant CM

[hgmprty1].[oth\_per2] Regional Admin

[hgmprty1].[oth\_per3] Head Of’s

[cmpgencd].[mod\_id]

[cmpgencd].[category\_id]

[cmpgencd].[code\_id]

[cmpgencd].[u\_version]

[cmpgencd].[desn]

WHERE [category\_id] in ('REGION\_CD', 'HA\_AREA','OTH\_REP1', 'OTH\_REP2', 'EXTRA7\_C01')

[hgmrpxrf].[spare\_2] Line Manager

[menugrp].[group\_id] QL Workgroups

[menuser].[group\_id] Default workgroup

[hpmspend].[spend\_limit] WO Spend limit

[popspend].[spend\_limit] PO Spend limit

[hgmpaud1] Audit

[hgmpaud2] Audit

[hgmpaud3] Audit

[hrartmt2].[ha\_rep\_cd] Patch

[hrartmt2].[region\_cd] Region

[hgmclent].[ha\_rep\_cd] Patch

[hgmclent].[region\_cd] Region

[acpmast].[area\_id] Patch

## 1st Touch tables

User information in 1st Touch

The following User information will be held in the [Profile] table in 1st Touch.

Profile.UserProperties

|  |  |
| --- | --- |
| **Description** | **User Property Field** |
| Domain\AD username (Primary Key) | UserName |
| Default scheme (4-digit code) | HC21\_DefaultScheme |
| Job Title | HC21\_JobTitle |
| User Main office (Court, Tricorn, Mobile, etc) | HC21\_Office |
| Email | HC21\_EmailAddress |
| QL User ID | QL\_UserId |
| QL Role | QL\_Role |
| QL default workgroup | QL\_DefaultWorkgroup |
| Works Order Limit (£) | HC21\_WorksOrderLimit |
| Business Stream | HC21\_BusinessStream |
| Region | HC21\_Region |
| Patch | HC21\_Patch |
| Line Manager (AD username) | HC21\_LineManager |

Data Segregation in 1st Touch

Which courts a user has access to will be held in the 1st Touch DW in a separate new table [user.schemes] with the following columns: -

* AD\_user (Domain\AD user)
* Business\_Unit

Each user will have at least one pair of values, but may have many pairs.

The rule for defining which business units apply to each user is that using the RL Organisation Hierarchy go up one level from where post is attached, then down to all Business Units below that level. In addition to the business units granted from the hierarchy, the fields hgmprty1.oth\_prty\_id1 and hgmprty1.oth\_prty\_id2 are used to hold ‘buddy’ courts. The court manager will therefore have these courts also in all user business unit tables.

Process to populate the above

Although the above information is all held in ResourceLink HR there will be new processes to populate the records in 1st Touch. These will be developed by HC21, and be populated overnight by SSIS