

Managing and showcasing internal organisation structures in Elements from 2023 onwards

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Managing internal organisational structures

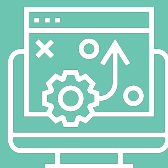
- The ability to create structured groups of users representing different aspects of an organisation is key to configuring and managing Elements.
- The Groups functionality allows organisations to:
 - Manage roles and permissions,
 - Govern access to functionality and data,
 - Explore and manage the data within Elements through the lens of their internal structures.
- To date, the Elements groups functionality allowed organisations to:
 - Capture basic operational metadata,
 - Set rules to determine group membership,
 - Define hierarchical relationships to create representations of internal group structures,
 - Define multiple branches representing both formal and informal groupings at their organisations.

Key use cases for 'Groups' within Elements



Structuring User data

Tracking where each user 'belongs' within the organisation forms part of the the basis of who is responsible for managing their data.



System Configuration

Many Elements systems configurations hang off the group structure including roles, module access, and data source configurations.



Reporting & Analytics

The ability to easily filter by group underpins effective reporting both to control how reports are generated but also who has access.



Showcasing the work of groups

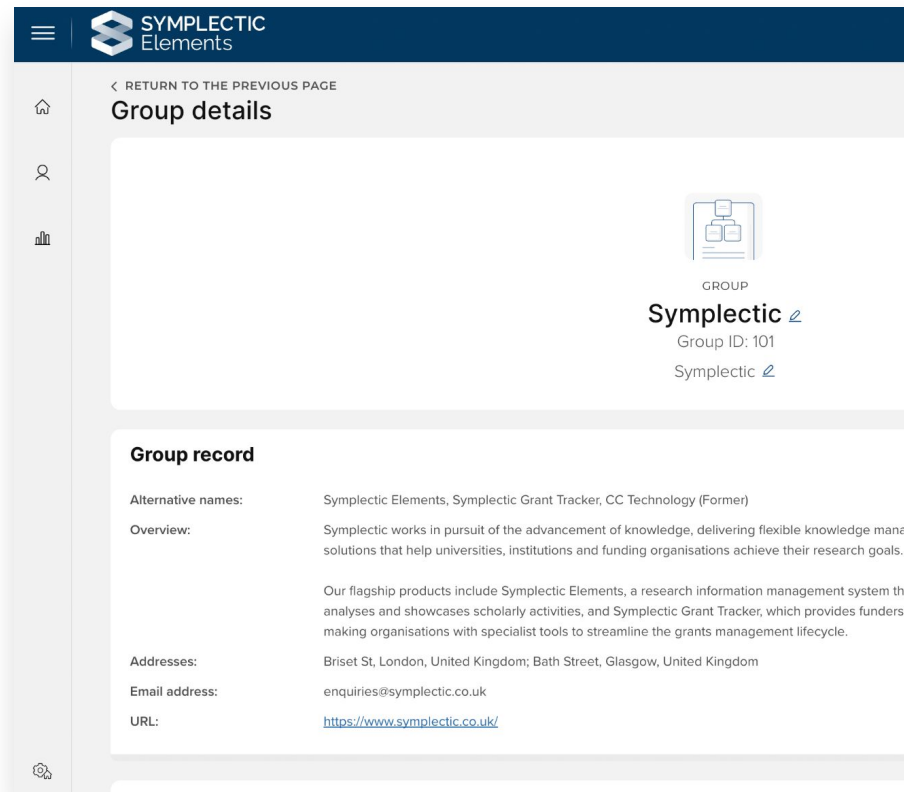
Organisations are now seeking to highlight the work of their researchers in both formal and informal groupings such as research themes.

Capturing more information about Groups

Help organisations capture more information about departments and research groups to showcase in reports and public profiles.

We plan to expand the Groups data model to support the capture of more descriptive metadata and information about associated key users (eg. Group Managers and Heads of Department). We also plan to introduce privacy settings for Groups, allowing you to identify groups for internal use-only vs. groups suitable to be shared publicly.

This vital extension to Elements Groups functionality will allow organisations to capture the data necessary to showcase their groups and departments.



The screenshot shows the 'Group details' page in the Symplectic Elements interface. The page has a dark blue header with the Symplectic Elements logo and a navigation menu on the left. The main content area is white and contains the following information:

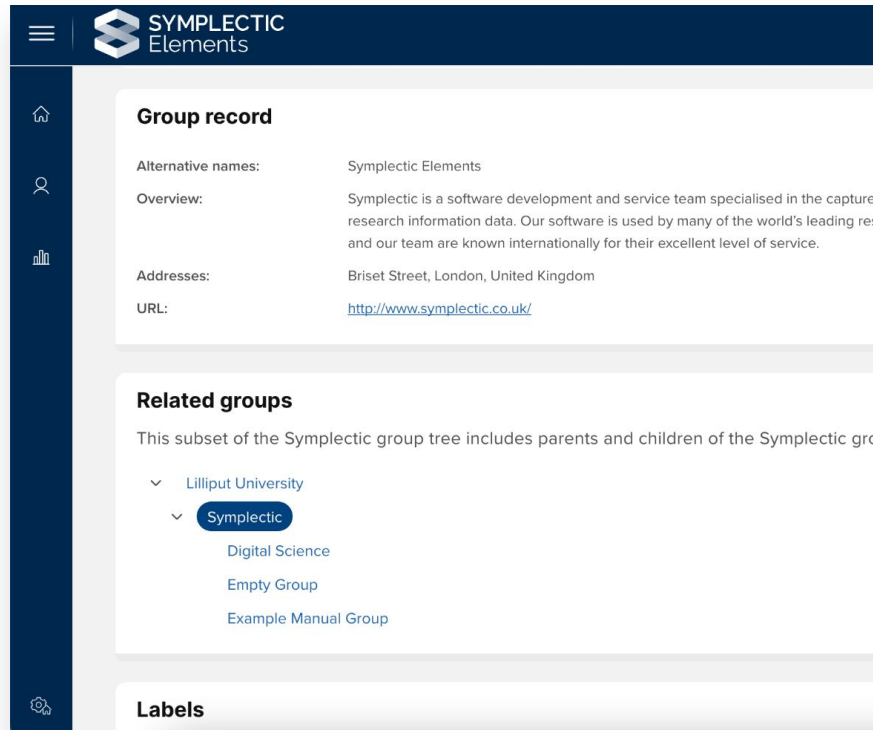
- Group details**: A section with a 'RETURN TO THE PREVIOUS PAGE' link and a 'GROUP' icon.
- Symplectic**: The group name, followed by 'Group ID: 101' and a link to the group's public profile.
- Group record**: A section with the following details:
 - Alternative names:** Symplectic Elements, Symplectic Grant Tracker, CC Technology (Former)
 - Overview:** Symplectic works in pursuit of the advancement of knowledge, delivering flexible knowledge management solutions that help universities, institutions and funding organisations achieve their research goals.
 - Our flagship products include:** Symplectic Elements, a research information management system that analyses and showcases scholarly activities, and Symplectic Grant Tracker, which provides funders making organisations with specialist tools to streamline the grants management lifecycle.
 - Addresses:** Briset St, London, United Kingdom; Bath Street, Glasgow, United Kingdom
 - Email address:** enquiries@symplectic.co.uk
 - URL:** <https://www.symplectic.co.uk/>

Streamlining Group Management

As organisations evolve, changing their internal structures so to must administrators update the representations of those groups within Elements.

As a part of our redesign of Elements' groups functionality, we plan to streamline the management of groups, allowing administrators to more easily manage your internal structures within the system.

- New related groups section to contextualise each group within the broader structure
- Ability to update parent groups, allowing you to more easily restructure group when needed.
- New Group Content Manager role

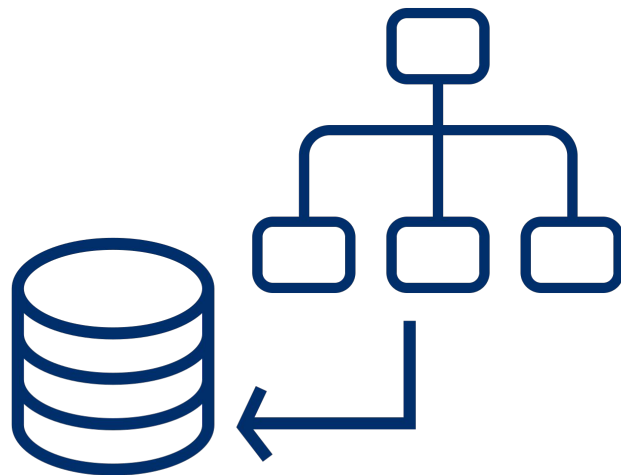


Streamlining the management of Groups

A new Groups Feed will make groups easier to manage, ensuring they stay up to date whilst saving administrators time and effort.

We plan to introduce a new standard integration which will allow organisations to feed information about their group structure into Elements via the API. As this is very powerful new feature, it will feature safeguards similar to the user feed cut-off to assist with the detection of significant changes which may require administrative review (eg. deletions, unexpected volumes of changes).

This new functionality will help streamline the management of groups, particularly for large organisations with many departments.



Demonstration

Target development timelines

February 2023

v6.12

April 2023

v6.13

July 2023

v6.14

- ✓ Redesigned Groups data model
- ✓ New Group page including:
 - New Group records with configurable metadata structure.
 - Ability to view and link to related groups
 - Labels and history sections.
- ✓ New Groups section in System Admin menu

- New API version with new Groups data including record-level metadata
- New group data added to reporting database
- Introduction of Group privacy settings (internal/public)
- Configurable Group types
- Change parent group feature
- Support for highlighted relationships

- New Groups feed to allow organisations to create, update or delete groups in bulk.
- Support for uploading image(s) for Discovery Module / public profile group pages
- Updates to additional groups related pages. Eg. manage roles.
- New Group Content Manager Role.

Preparing to use this new
functionality

Considering how your group structure might evolve

There are a number of options you may wish to consider for evolving your group structures to take advantage of this new functionality:

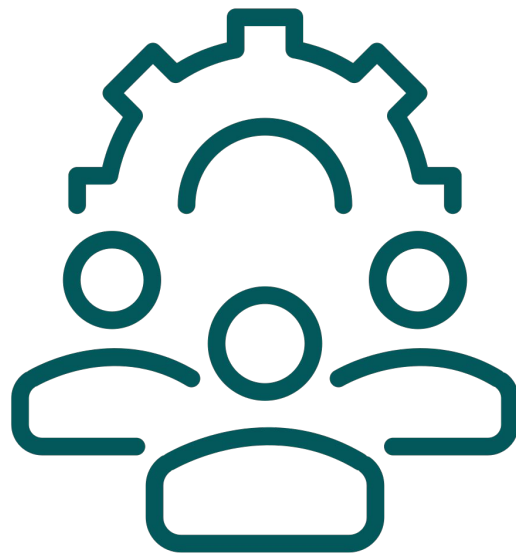
- Does your group structure represent all relevant 'views' of your organisation?
 - Formal group structure
 - Research groups / clusters / themes
 - Administrative groups
- Which of your groups might you want to make public via your profiles site?
 - Plan curation of descriptive metadata
 - Plan privacy settings
 - Consider imagery



Planning the 'governance' approach for groups

These expansions to the groups functionality may mean you wish to review how your plan to manage groups data:

- System Administrators and Group Managers continue to be able to manage group structures including creating and deleting groups and managing group membership.
- A new Group Content Manager role will allow a user to manage the metadata associated with a group.
- We are considering whether there is a need for a specific Group membership manager role.
- If you have a 'source of truth' for groups data you may wish to consider feeding this to Elements.



Questions?