



Unit Identification and Hierarchy Database (UHD)

Administrative User Guide (including Web Services)

September 22, 2015

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Background

Universities depend, as do all business enterprises, on an organizational structure that defines "units" (groupings of people, facilities, and budgets) as well as reporting hierarchies (which unit reports to which other unit). At universities, this structure applies both to academic and administrative operations. It is also used for other hierarchical reporting lines such as special workflow approval flows, data roll ups and informal reporting lines. In the "physical world", this structure dictates decision-making chains of command, paper-based approval workflows, personnel management, budgetary authority, and literally hundreds of different processes.

As enterprise business processes move to software applications for automation and efficiency (the "virtual world"), the organizational structure also needs to become virtual (electronic) to support these processes. For some years, the electronic identification of units at the University of Georgia (UGA) has been maintained in a system commonly referred to as the Budgetary Organizational Structure (a database table named BUD_ORG_STRUCTURE), which we will abbreviate "BOS". BOS assigns "department codes" to units to allow financial reporting and budget analysis. Because the current system was developed specifically for financial reporting and identifies only units that have independent budgets, it does not meet all UGA needs for identifying and managing units, although it is often used in that capacity.

UHD was created in the Office of the Vice President for Research (OVPR) to expand our ability to identify units and track relationships among units at UGA, beyond those identified by budgets in BOS. This manual describes the structure and use of UHD in defining and using the organizational structure of UGA.

Benefits of UHD

UHD was designed to overcome the main limitations of BOS by expanding and diversifying the system to:

- categorize units by type;
- identify both official and unofficial units;
- recognize unit hierarchical relationships over any number of levels;
- track multiple types of unit hierarchical relationships (e.g., budgets and accounts, academic and administrative units, academic programs and majors); and
- track historical changes to units, unit types, and unit relationships.

UHD is also constructed as an SQL-compliant database utilizing modern service-oriented architecture (SOA) methods to make the unit identification and hierarchical data available to any appropriate application (e.g., through web service APIs).

Role-based access to administrative interfaces allows either centralized or decentralized maintenance of the content.

Structure of UHD

UHD maintains unit attributes associated both with the identity of the unit and with the relationship(s) among units (the hierarchy). We describe here the various attributes and how they are used, but a more detailed definition of each is provided in a Glossary (Appendix A).

Unit Identity

UHD contains a set of attributes that relate only to a given unit (unrelated to hierarchy).

UHD Code

The primary entity in UHD is referred to as a **UHD unit**, with a unique identifying code (**UHD unit number**) consisting of 5 digits as displayed. Units that are terminated retain their code; the UHD codes are never reused.

Unit Long Name

Each UHD unit has several name fields, the primary (required) one being the **Unit Long Name**, which is the official name of the unit in the real world. UHD units must also be assigned a **Unit Short Name** (30 characters or less) for use in applications that limit the length of a name field. UHD units may also have a **Budgetary Name** (also 30 characters or less), which is normally the name assigned to the "department" in BOS. UHD units may also be assigned in UHD with an unlimited number of **Synonyms**, which are used to simplify finding a UHD unit record.

Unit Type

Each UHD unit is assigned at least one **Unit Type**, allowing categorization of different kinds of units (departments, schools, centers, institutes, etc.). UHD units can be assigned multiple Unit Types. The current list of Unit Types is provided in Appendix B. In that table, values in the **Unit Status** column indicate whether Units of this Unit Type are always Official (O), always Unofficial (U), or could be either (O/U). These restrictions are set by UGA business rules and can be changed by a UHD Administrator.

Status Documentation

When an *official* UHD unit is created, an upload feature allows archiving the documentation (**Status Documentation**) used to administratively approve the official creation of the unit. Current business rules do not *require* documentation, but that could be reconsidered.

Budget Code

For UHD units that use budgets in BOS, the BOS department code occupies the **Budget Code** field in UHD. A nightly automatic feed from BOS synchronizes the BOS departments with UHD units, recording name changes (see below).

Unit Hierarchy

UHD relates "child" and "parent" units (a child reports to a parent, or in some cases is a subunit of a parent) through a **Unit Hierarchy**. A UHD unit may have more than one unit hierarchy or reporting type. (See below.)

Reporting Type

UHD maintains unlimited multiple hierarchies in parallel, each being termed a **Unit Hierarchical Category** (also called "Reporting Type"). UHD Administrators can create new unit hierarchies (see *Managing Attribute Lists*). As defined, each Unit Hierarchical Category must be assigned a cardinality (a number defining how many parents a given UHD unit may have).

At the time of this writing, five Unit Hierarchies are in use:

- Administrative, which describes the real-world reporting structure of UGA units, essentially the UGA organizational structure;
- Budgetary, which synchronizes with the BOS accounting structure;
- Subunit, which is used to distinguish units *within* other units (as opposed to units *reporting to* other units);
- OVPR_Transmittal, which defines an approval workflow hierarchy used in OVPR's eResearch Portal research administration applications.
- Elements, which defines the academic reporting structure for data roll ups in the UGA Elements faculty activity repository

Appendix C. Unit Hierarchical Categories describes these and other possible hierarchies.

History

UHD is designed to track all changes in UHD units and unit hierarchical relationships. Each unit has a start date and, if terminated, an end date. Changes made to any of the names, any unit type, unit status, budget code, are all time-stamped to create an historical record of UGA's structure. In addition, changes to reporting (parent-child relationships) are time-stamped. With complete and accurate content, this allows a display of UGA's organizational structure at any date in the past.

This historical method of record keeping (using SQL Fourth Normal Form) allows queries based on end date, which return attributes (reporting structure, status, name, etc.) as they were at the specified end date.

Administration of UHD

UHD Portal

All users, with any roles, access UHD through a single portal at <https://paul.ovpr.uga.edu/UHDPortal/>. This link takes the user to a MyID login screen. Upon successful authentication of the user's UGA MyID and password, the user is taken to the Administrator Menu. The capabilities provided to the user depend on the user's role in the application. At the time of writing, only two roles are defined: UHD User and UHD Administrator.

UHD Users

UHD Users consist of anyone with a valid MyID. UHD Users have read-only access to all UHD content in a read-only mode.

UHD Administrators

UHD Administrators are assigned by the UHD Superuser (managed by OVPR administrators outside the UHD Portal); they have read/write access to all UHD content, and can edit or add UHD units. UHD Administrators who login through this URL are taken to a Main Menu (labeled [Administrator Menu](#)).

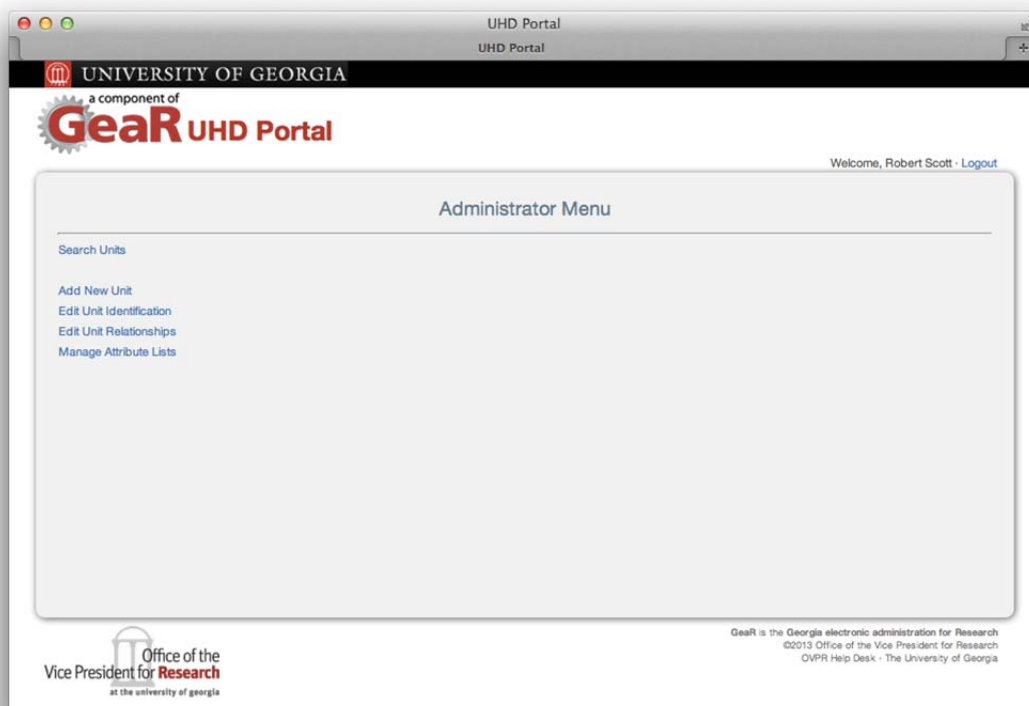


Figure 1. UHD Administrator Menu

Search for UHD Unit and Display its History

Clicking on [Search Units](#) (on the [Administrator Menu](#)) takes the user to a search page (when a UHD User logs in, they are directed to this page immediately).

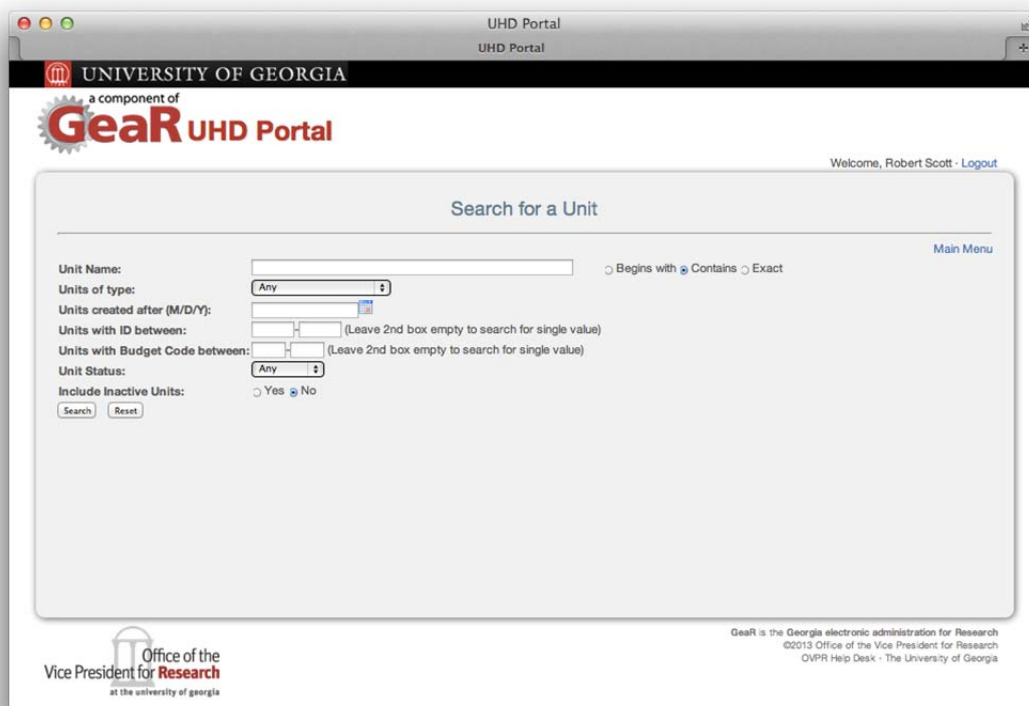


Figure 2. Search for a Unit screen

There are many ways to find a UHD unit using this advanced search page; by default, you are searching current active units. By selecting the radio button “Yes” for **Include Inactive Units**, searches will include inactive and active units. The results of a search (the hit list) are displayed below this search area.

UHD Portal
UHD Portal

UNIVERSITY OF GEORGIA
a component of
Gear UHD Portal

Welcome, Robert Scott - [Logout](#)

Search for a Unit

Unit Name: Begins with Contains Exact [Main Menu](#)

Units of type:

Units created after (M/D/Y):

Units with ID between: (Leave 2nd box empty to search for single value)

Units with Budget Code between: (Leave 2nd box empty to search for single value)

Unit Status:

Include Inactive Units: Yes No

Search Results

Records: 7, Pages: 1

UHD Units					
Unit ID <small>Click for complete details</small>	Budget Code	Long Name	Unit Type(s)	Unit Status	Active
00031	152	BIOLOGICAL AGRICUL ENGINEERING	Budgetary	Official	Y
00117		Institute of the Faculty of Engineering	Budgetary; Institute	Official	Y
00163		Nanoscale Science and Engineering Center (NanoSEC)	Center	Official	Y
00193	038	EITS Security, Network Operations and Infrastructure	Budgetary; Institutional Support	Official	Y
00642	410	ENGINEERING DEPARTMENT	Budgetary	Official	Y
00845		FACULTY OF ENGINEERING	Budgetary	Unofficial	Y
00869	722	College of Engineering	Budgetary; College	Official	Y

Office of the Vice President for Research
at the university of georgia

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Figure 3. Search Results

To display detailed history for the College of Engineering, click on the Unit ID for that unit (00869 in this case).

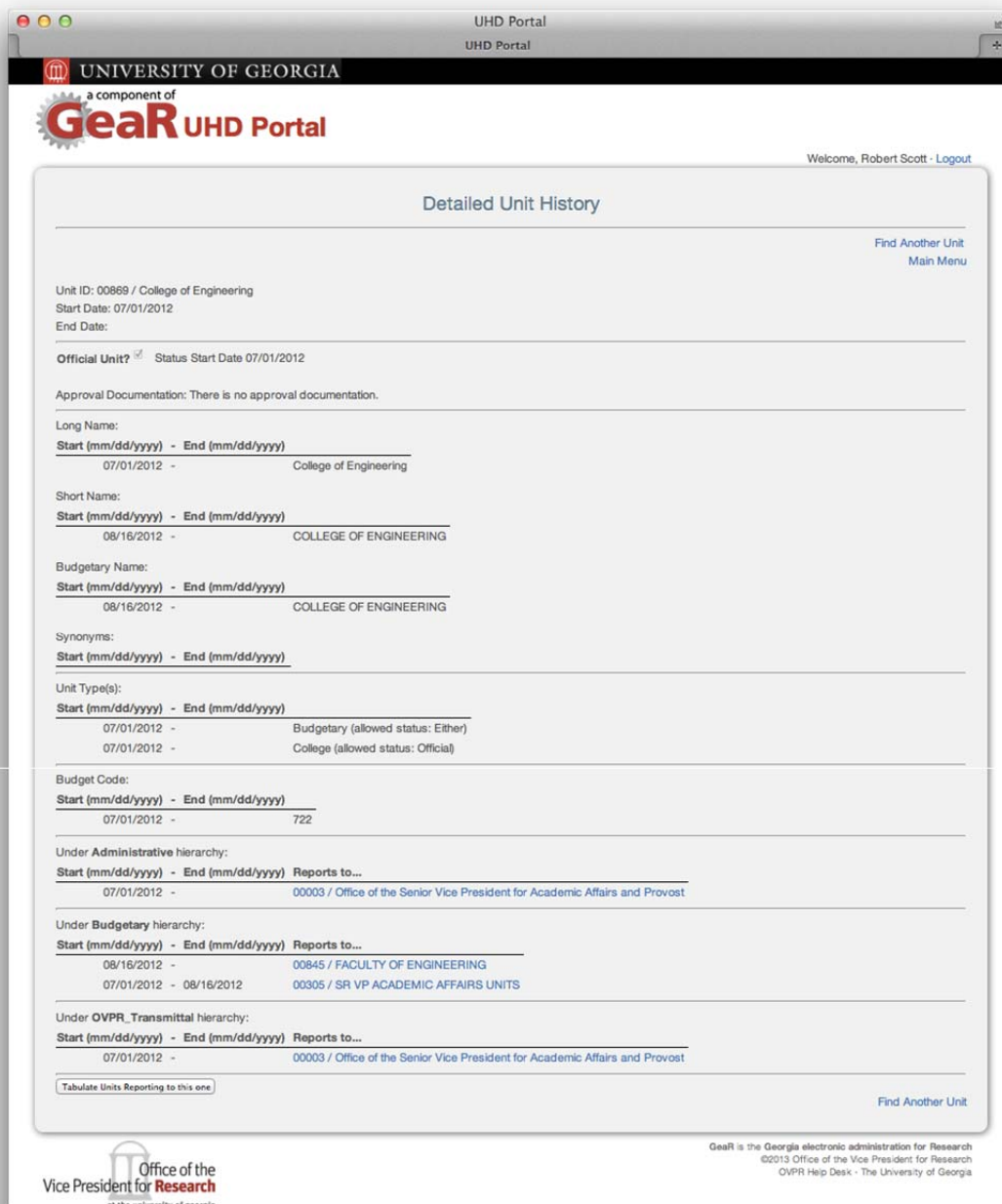


Figure 4. Detailed Unit History

Detailed Unit History

This page provides the entire history of all fields for this UHD unit record. In the bottom section appears the history of parent units in each Unit Hierarchy for which this unit has an assigned parent. They are linked to a [Detailed Unit History](#) page for those units.

Tabulate Units Reporting to this one

The button at the bottom left [Tabulate Units Reporting to this one](#) displays all the children of this unit. This button takes the user to a page ([Display Hierarchy](#)) on which the particular unit hierarchy to be

queried can be selected. The user also has the opportunity to look only for a subset of Unit Types in the hierarchy. The user may also select a date, which will return the hierarchy in effect on that date. The default value is the current date. (NOTE: UHD is NOT populated with historical data before about three years previous.) Once the search parameters are set, pressing [Submit](#) displays the hierarchy from this unit down (children and descendants) on the same page. (In the case of UHD 00869, there are no units that report to the College of Engineering at present, so the screen shot below is of UHD 00009, OVPR.)

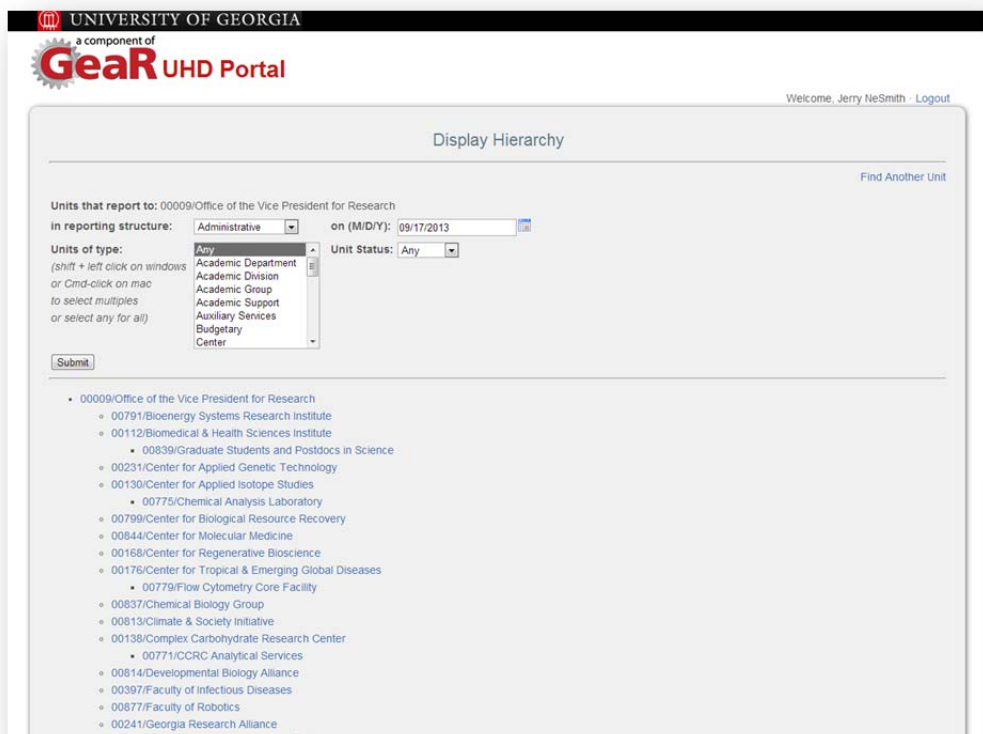


Figure 5. Display Hierarchy (units reporting to this one)

Adding a new UHD unit

Back on the [Administrator Menu](#), clicking [Add New Unit](#) brings up a page to enter all data needed to define and create a new UHD unit. By default, all start dates for this information are set to today, but this can be changed to any past date.

Defining the new UHD unit

As an example below, information has been entered for a fictitious unit Center for Fantasy Games, reporting to the Office of the Vice President for Instruction. It is imagined to be an official center (approved by University Council) so Unit Type is selected as Center, but does not have a Budget Code. The Official status is checked, but no documentation is available.

The screenshot shows a web browser window titled "UHD Portal" with the University of Georgia logo and "Gear UHD Portal" branding. The page is titled "Add a New Unit" and includes a "Main Menu" link. A note states: "Note: The Unit ID will be automatically generated." The form contains several sections, each with a date range selector (Start (mm/dd/yyyy) - End (mm/dd/yyyy)) and a "Current" status indicator:

- Unit Start Date:** 09 / 03 / 2013. Includes a link: "Set All Current Start Dates to Entered Start Date".
- Unit names:** Enter Names and start date (default: today).
 - Long Name:** *Required. Value: "Center for Fantasy Games". Includes "Add a Long Name" button.
 - Short Name (30 characters maximum):** *Required. Value: "CENTER FOR FANTASY GAMES". Includes "Add a Short Name" button.
 - Budgetary Name:** *Required. Value: "Center for Fantasy Games". Includes "Add a Budgetary Name" button.
 - Synonyms:** Value: "CFG". Includes "Add a Synonym" button.
- Unit Type:** *Required. Value: "Center (allowed status: Official)". Includes "Add another Unit Type" button.
- Budget Code:** *Required. Value: "Center (allowed status: Official)". Includes "Add a Budget Code" button.

At the bottom, there are checkboxes for "Is Official Unit?" (checked), "Approval" (Choose File | no file selected), and "Documentation" (Submit).

Figure 6. Add a New Unit

Edit Reporting Relations

Pressing the [Submit](#) button takes the administrator to the [Edit Reporting Relations](#) page, where the OVPI parent has been selected in both Administrative and OVPR_Transmittal hierarchies.

(Note that clicking on the Unit ID link at the top of this page toggles the expansion of more detail about the unit if needed.)

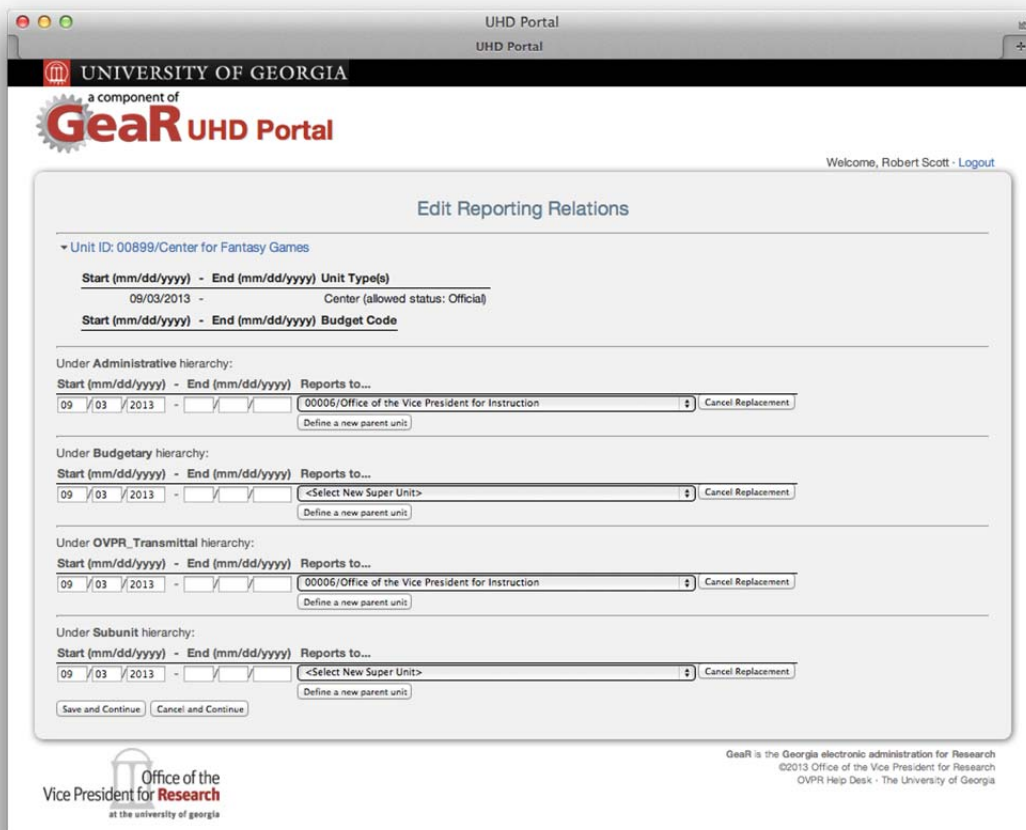


Figure 7. Edit Reporting Relations

The administrator has the opportunity to either [Save and Continue](#) or [Cancel and Continue](#); in either case, a [Detailed Unit History](#) page is displayed to allow review of the details of the new unit (an example of this page is provided earlier in this manual).

Editing an existing UHD unit

On the [Administrator Menu](#), clicking on [Edit Unit Identification](#) first takes the administrator to the [Search for a Unit](#) page (example provided earlier), which can be used to generate a hit list as before. Clicking on the Unit ID of the unit of interest takes the administrator to the [Edit Unit](#) page.

The screenshot shows a web browser window titled "UHD Portal" with a user greeting "Welcome, Robert Scott - Logout". The main content area is titled "Edit Unit" and contains the following sections:

- Unit Information:** Unit ID: 00899, Unit Start Date: 09/03/2013, Unit End Date: (empty).
- Unit Names:** A section with instructions "Enter Values and start date (default: today)". It includes:
 - Long Name:** Start (09/03/2013) - End (empty). Value: "Center for Fantasy Games". Buttons: "Replace Current Long Name", "Current".
 - Short Name:** Start (09/03/2013) - End (empty). Value: "CENTER FOR FANTASY GAMES". Buttons: "Replace Current Short Name", "Current".
 - Budgetary Name:** Start (09/03/2013) - End (empty). Value: (empty). Buttons: "Replace Current Budgetary Name", "Current", "Cancel Replacement".
 - Synonyms:** Start (09/03/2013) - End (empty). Value: "CFG". Button: "Add another Synonym".
- Budget Code:** A section with instructions "Enter Budget Code and start date (default: today)". It includes:
 - Budget Code:** Start (09/03/2013) - End (empty). Value: (empty). Buttons: "Replace Current Budget Code", "Cancel Replacement".
- Unit Type:** A section with instructions "Enter Unit Type and start date (default: today)". It includes:
 - Unit Type:** Start (09/03/2013) - End (empty). Value: "Center (allowed status: Official)". Buttons: "Add another Unit Type", "Current".
- Is Official Unit?** A checkbox with "Status Start Date (mm/dd/yyyy): 09/03/2013".
- Approval:** A "Choose File" button and "no file selected" text.
- Documentation:** A "Submit" button and a "Deactivate Unit on" date field.

At the bottom left is the logo for the Office of the Vice President for Research at the University of Georgia. At the bottom right is the GearR logo and text: "GearR is the Georgia electronic administration for Research ©2013 Office of the Vice President for Research OVPB Help Desk - The University of Georgia".

Figure 8. Edit Unit

On this page, the administrator can use the buttons to replace Long Name, Short Name, Budgetary Name, or Budget Code, or add another Synonym or Unit Type. By default, Start Dates are set to today's date, but these can be edited and will not allow overlap of timeframes. Pressing the [Submit](#) button on this page takes the administrator to the [Edit Reporting Relations](#) page (example provided earlier) in case these relationships also require editing.

Changing reporting relationships

In some cases, only the reporting relationships require editing, so the [Edit Unit Relationships](#) link on the [Administrator Menu](#) takes the administrator directly to the [Edit Reporting Relations](#) page on which this editing can be done.

Displaying unit hierarchy

General users (anyone with MyID) can view any portion of any of the hierarchies in UHD by starting at the [Search for a Unit](#) page (administrators get there by clicking [Search Units](#) on the [Administrator Menu](#)). Use the search function to find the top unit in the hierarchy of interest, click on the unit to get the [Detailed Unit History](#) page, then click the bottom button [Tabulate Units Reporting to this one](#) and select the hierarchy and Unit Types and Unit Status you wish to display. The result is displayed at the bottom of the [Display Hierarchy](#) page, and every unit is a link to the [Detailed Unit History](#) page for that unit. For

example, the Administrative Hierarchy for the Office of the Vice President for Development and Alumni Relations is shown here.

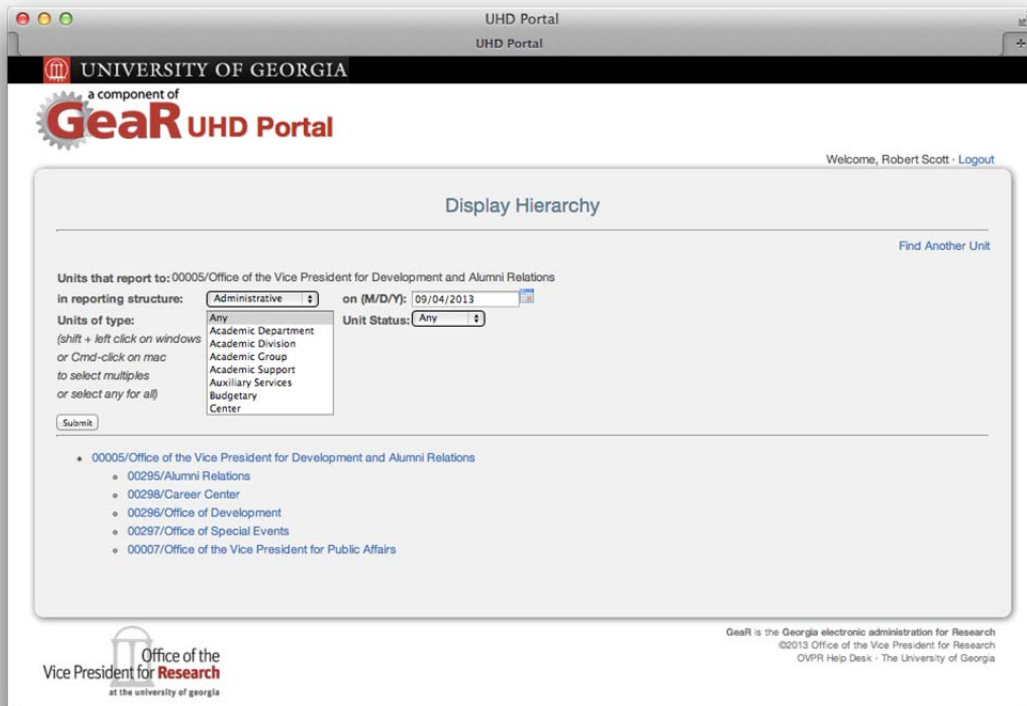


Figure 9. Display Hierarchy (Edit Unit)

Managing Attribute Lists

UHD Administrators have the ability to create/revise the possible Unit Types and Reporting Types (Unit Hierarchical Categories) that can be assigned. On the [Administrator Menu](#), clicking the [Manage Attribute Lists](#) link takes you to a page on which both lists are managed.

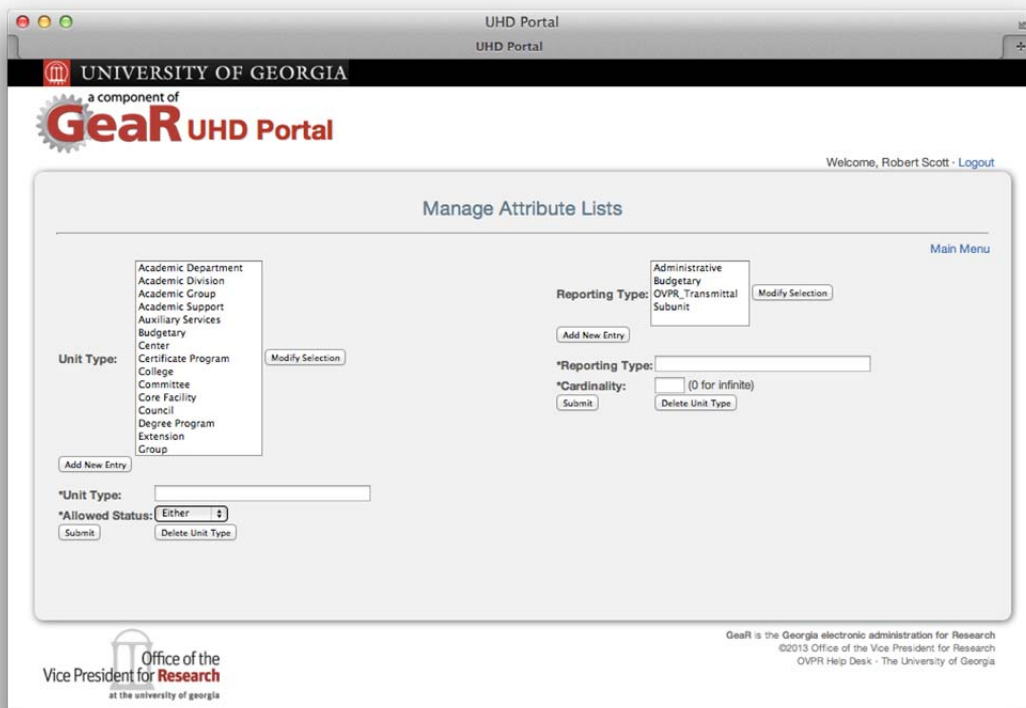


Figure 10. Manage Attribute Lists

Either or both lists can be expanded or edited on this page. For either list, clicking the [Add New Entry](#) button displays the text boxes below the table. The administrator enters text for the new Unit Type and chooses an Allowed Status (Official, Unofficial, Either) for the Unit Type attribute. Pressing the [Submit](#) button adds that new Unit Type. Alternatively, text is entered for the new Reporting Type and a number is entered for Cardinality; the [Submit](#) button adds the new Reporting Type. To edit an existing Unit Type or Reporting Type, click on the one to edit in the table list and press [Modify Selection](#). The fields below the table are then prepopulated with the details of that value and can be edited. The [Submit](#) button then saves those changes. The [Delete ... Type](#) buttons allow the administrator to delete that value from the attribute list *only* if it is not assigned to any existing UHD unit.

Relationship to Budget Organizational Structure

The Budgetary Hierarchy was created to synchronize UHD with the hierarchy described in BUD_ORG_STRUCTURE (BOS). That hierarchy, as designed years ago, consists of exactly three levels:

- Departments (with assigned three-digit Budget Codes) report to
- Intermediate Units, which report to
- Major Units.

The latter two categories are indexed independently in BOS, but become units like all others in UHD. All units from BOS have assigned Unit Type of Budgetary and are assigned parent units in the Budgetary Hierarchy consistent with the hierarchy in BOS. This synchronization occurs nightly by downloading BOS and running an automated script that looks for changes compared to the previous

import. (Often this process requires some manual curation by an OVPR administrator, as described below.)

Description of UHD BUD_ORG_STRUCTURE BUILDER Process

The UHD database is updated on a nightly schedule based on changes detected in the QUERY.BUD_ORG_STRUCTURE table on the mainframe (IMS).

The program responsible is UHDBudOrgStructureBuilder.

Source code: <https://svn.ovpr.uga.edu/svn/ovpr-project/UHDBudOrgStructureBuilder/>

A possible bug in the program has been documented here:

<https://fogbugz.ovpr.uga.edu/default.asp?19113>

When to add a new UHD Unit

Case #1. A Major Unit is found in BUD_ORG_STRUCTURE that has not already been mapped to a UHD Unit.

Case #2. An Intermediate Unit is found in BUD_ORG_STRUCTURE that has not already been mapped to a UHD Unit.

Case #3. A Department Unit is found in BUD_ORG_STRUCTURE that has not already been mapped to a UHD Unit.

How the UHD Unit will be created

+ The new UHD Unit will be given the Unit Type of "Budgetary"

+ The new UHD Unit will be given the same Long Name and Budgetary Name. It will be one of the following:

The Major Unit Description (Case #1)

The Intermediate Unit Description (Case #2)

The Department Unit Name (Case #3)

+ The new UHD Unit will be mapped to the BUD_ORG_STRUCTURE unit using one of the following tables:

BOS_MAJOR (Case #1)

BOS_INTR (Case #2)

UNIT_BUDGET_CODES (Case #3)

+ The UHD Unit will be set to report (under the Budgetary Reporting Structure) to one of the following:

UHD Unit #00001 (The University of Georgia) (Case #1)

The UHD Unit Mapped to the parent Major Unit (Case #2)

The UHD Unit Mapped to the parent Intermediate Unit (Case #3)

When to modify a UHD Unit

+ If the UHD Unit is already mapped to any Unit from BUD_ORG_STRUCTURE (Major, Intermediate, or Department), and the Unit is still present in BUD_ORG_STRUCTURE, do the following:

If the UHD Unit doesn't still have the "Budgetary" Unit Type, restore it.

If the Unit Name from BUD_ORG_STRUCTURE is not among the UHD Unit's names in UHD, add it (see: Add Unit Name process)

+ If the UHD Unit is already mapped to a Major Unit from BUD_ORG_STRUCTURE, and the Unit is still present in BUD_ORG_STRUCTURE, additionally do the following:

If the UHD Unit reports to a different parent unit in the Budgetary Hierarchy vs. the Administrative Hierarchy, update the Budgetary Hierarchy so that the UHD Unit now reports to the same parent unit as in the Administrative Hierarchy.

+ If the UHD Unit is already mapped to an Intermediate or Department Unit from BUD_ORG_STRUCTURE, and the Unit is still present in BUD_ORG_STRUCTURE, additionally do the following:

If the UHD Unit reports to a different parent unit in the Budgetary Hierarchy vs. BUD_ORG_STRUCTURE, update the Budgetary Hierarchy so that the UHD Unit now reports to the same parent unit as in BUD_ORG_STRUCTURE.

+ Prevent a UHD Unit from reporting to itself: If a UHD Unit is mapped to multiple levels of the BUD_ORG_STRUCTURE hierarchy (e.g., UHD Unit is mapped to both an Intermediate Unit and its parent Major Unit), only perform the UHD Reporting Structure modification prescribed for the highest level of BUD_ORG_STRUCTURE hierarchy found (in the previous example, only the steps for a Major Unit would be performed).

Add Unit Name process

When adding a new unit name to an existing UHD Unit:

- If the new Unit Name is already the Long Name, Budgetary Name, or a Synonym for the UHD Unit, do nothing.
- Never alter the UHD Unit's Long Name, we want to keep whatever name was entered here (often manually) previously.
- If the UHD Unit does not already have a Budgetary Name, the Unit Name being added will become the Budgetary Name.
- If the UHD Unit already has a Budgetary Name, the Unit Name being added will be added as a Synonym (of which there may be multiple per UHD Unit).

Other considerations

- On any given date, multiple UHD Units may be mapped to the same Department Unit from BUD_ORG_STRUCTURE. All such UHD Units will be updated, if need be.
- UHD Unit Names and UHD Reporting Relationships that are no longer valid are terminated by applying the present date as the End Date, per UHD timespan rules.
- UHD Units that disappear from BUD_ORG_STRUCTURE, or are otherwise not present, are not deactivated in UHD.

Appendix A. Glossary of Terms

Budget Code

The name within UHD for the "Department" 3-digit code used to identify budgets in BUD_ORG_STRUCTURE. This is to distinguish it from Unit Type = Academic Department.

Budgetary Name

The name of the UHD unit within BUD_ORG_STRUCTURE (30 characters or less).

Status Documentation

A field associated with each unit that contains a link to the approval documentation for units with Unit Status = Official (this could be required by business rule; the 2013 version of UHD has not imposed this business rule).

UHD code or UHD Unit Number

This specifically refers to the 5-digit code that indexes all units (a secondary key).

UHD role

A role that is responsible for maintaining the UHD application (potentially for a subset of units, although this is not currently implemented).

UHD unit

A term that refers to a unit within the context of the UHD system.

Unit

Usually, any grouping of people. These can be easily recognizable official academic units like Departments, Colleges, or they can be unofficial groups like Committees, Faculties. Sometimes, units may not contain people, such as budgets in the Budgetary hierarchy.

Unit Hierarchical Category

UHD maintains information on different kinds of reporting relationships. A set of these relationships is labeled a Unit Hierarchical Category (UHC), such as the Administrative hierarchy that defines the reporting relationships associated with the administrative operations of the university.

Unit Hierarchy

The set of reporting relationships within a specific Unit Hierarchical Category. For example, all the parent-child unit relationships within the Budgetary UHC would be described as the budgetary unit hierarchy (or just budgetary hierarchy).

Unit Long Name

A required field in the UHD database that "names" each unit. The Long Name is the full English name of the unit, without abbreviations. Every unit record also contains a field Budgetary Name (30-character limit), which initially holds the abbreviated name used in BUD_ORG_STRUCTURE for a unit defined therein. UHD also requires a Unit Short Name (30-character limit) and optionally allows the definition of multiple Synonyms to facilitate searching.

Unit Short Name

A required field in the UHD database that provides a short name (30 characters or less) for each unit. The Short Name is useful for applications that restrict the length of a name field in use in that app.

Unit Status

A field in the UHD database that defines whether a unit is "Official" or "Unofficial".

Unit Synonym

An optional set of fields in the UHD database that defines any number of synonyms for a unit. Synonyms are useful for finding units that may be referred to by acronyms, historical names or other unofficial nomenclature.

Unit Type

A field in the UHD database that describes the type(s) of each unit. For example, units can be officially recognized units like Academic Departments, Schools, Centers, Institutes, or they can be unofficial groups like Committees, Academic Groups. A unit may have multiple Unit Types; e.g., a unit could be both an Academic Department and a Budgetary unit (two simultaneous Unit Types). Each Unit Type is assigned to be associated with units with Unit Status of Official, Unofficial, or either (Appendix B).

Appendix B. Unit Types

Possible Unit Types	Unit Status	Definition
Academic Department	O	An official (O) academic unit within a College, Division, or School (e.g., Department of Psychology)
Academic Division	O	An official academic unit within a College or School (e.g., Division of Biological Sciences in Franklin College of Arts & Sciences)
Academic Group	U	An unofficial (U) group of faculty (e.g., Developmental Biology Group)
Academic Support	O/U	An official or unofficial unit that supports the academic functions of the university (e.g., Law School Library)
Auxiliary Services	O	An official non-academic unit that provides auxiliary functions (e.g., Georgia Museum of Art)
Budgetary	O/U	An official or unofficial unit within the Fiscal Unit Hierarchical Category (e.g., WORK STUDY)
Center	O	An official Center, as defined in Academic Affairs Policy Statement 7
Certificate Program	O	An official program of study resulting in a Certificate (e.g., the Music Business Certificate Program)
College	O	An official academic unit to which Departments report (e.g., College of Veterinary Medicine)
Committee	O/U	A possibly temporary unit consisting of committee members (e.g., President's Faculty Advisory Committee)
Core Facility	O/U	A shared-use core research facility that supports research (e.g., Georgia Genomics Facility)
Council	O/U	A unit that provides advice or is a part of the faculty governance process (e.g., Research Advisory Council, University Council)
Degree Program	O	An official program of study leading to a degree (e.g., Master of Business Administration)
Elements AutoGroup	O/U	A unit assigned as an AutoGroup in UGA Elements
Elements CIG	O/U	A unit assigned as a Center/Institute/Group in UGA Elements
Elements Primary Group	O/U	A unit assigned as a Primary Group in UGA Elements
Extension	O	A unit that provides extension services within CES (e.g., 4-H and Youth Programs) or CES itself (should consider whether these always also have Unit Type of Outreach/Public Service?)
Group	U	An unofficial group of personnel organized for any UGA-related activity (defined to handle unofficial groups that cannot be assigned as Academic Groups or Student Groups)
Institute	O	An official Institute, as defined in Academic Affairs Policy Statement 7
Institutional Support	O/U	A unit that supports the institution outside or across the Academic, Instructional, Student Support areas (e.g., Office of the President)
Instruction	O/U	A unit that provides instruction (likely a secondary Unit Type to be assigned to many units)

Possible Unit Types	Unit Status	Definition
Instructional Support	O/U	A unit that supports the instructional functions of the university (e.g., Division of Academic Enhancement)
Major	O	A discipline within a Degree Program (e.g., MBA in Finance)
Minor	O	A group of courses that provides students with expertise in an academic field other than the student's major.
Outreach/Public Service	O/U	A unit that provides public service and outreach activities (likely a secondary Unit Type to be assigned to many units)
Program	O/U	A non-degree granting program (e.g., Georgia Sea Grant Program; Honors Program)
Research	O/U	A unit that provides research activities (likely a secondary Unit Type to be assigned to many units)
Research Support	O/U	A unit that supports the research functions of the university (e.g., Office of Research Services)
School	O	An official academic unit that may occupy the highest level or may report to a College; Schools normally do not have Academic Departments as children (e.g., Warnell School of Forestry and Natural Resources, Lamar Dodd School of Art)
Sophia level1	O/U	Sophia is the new application that Innovation Gateway uses to track technology cases (patents, licenses); it uses a two-level hierarchy. This unit type defines the 'parent' level ...
Sophia level2	O/U	... and this unit type defines the 'child' level of the Sophia unit hierarchy.
Student Group	O/U	A group of students (e.g., Graduate Student Association)
Student Services	O	A unit that provides services to students (e.g., Counseling and Psychiatric Services)
Task Force	O/U	A possibly temporary unit consisting of Task Force members (e.g., Research Task Force)

Appendix C. Unit Hierarchical Categories

Unit Hierarchical Category	# of Parents	Definition
Administrative	0* or 1	This category defines what would be recognized as the organizational chart of the enterprise. It defines a hierarchy that follows employees and the units to which they report, defining the reporting structure of the university (e.g., a <i>department</i> reports to a <i>college</i> that reports to the <i>Office of the Senior Vice President for Academic Affairs and Provost</i> that reports to the <i>Office of the President</i>).
Budgetary	1	This category defines a hierarchy that follows money. In this hierarchy, parents represent budgets into which component budgets "roll up". This category is identical to the current Budgetary Organizational Structure. No Unofficial Units should be allowed to participate in the Budgetary category.
Academic (future)	0* to many	This category defines a hierarchy that follows students enrolled in programs. For example, units with Unit Type of Degree Program or Certificate Program might have a parent Unit with Unit Type of Department or School. Some Programs serve more than one parent.
OVPB_Transmittal	1	This category defines a hierarchy used to create the approval workflows for the eResearch Portal Grants proposal transmittal process. (Some schools and colleges define approval chains that digress from the Budgetary or Administrative hierarchies.)
Subunit	1	This category defines a hierarchy that describes units that are components (subunits) of other units. For example, the Office for Sponsored Programs is a subunit of OVPB, rather than "reporting to" OVPB, as is indicated by the Administrative hierarchy.
Elements	1	This category defines a hierarchy that describes units that are reflect the reporting hierarchy for faculty activity roll ups. For example, the Department of Educational Theory and Practice reports to the College of Education

*0 parents may be allowed only for UHD Units with Unit Status of Unofficial

Appendix D. UHD Web Services

Other than just browsing or searching the UHD hierarchy, the most common method of using the unit identification and hierarchy information is by system-to-system web services.

There are two types of requests you can make, and the "action" parameter in the URL tells the web service which one to do:

- action=getParentUnit
- action=getUnits

If you leave out the action parameter, it will default to "getParentUnit"

Action getUnits

When using action=getUnits, you can use the following parameters, all of which have a default value used when omitted:

- unitName : when omitted or empty string, all units are returned. defaults to empty string
- unitNameMatch : can be in (begins, contains, exact) defaults to contains
- nameType : can be in (longName, budgetaryName, synonym, all) defaults to all

Example 1: Find all UHD Units having a Long Name containing "research"

<https://paul.ovpr.uga.edu/UHDService/?action=getUnits&unitName=research&unitNameMatch=contains&nameType=longName>

Example 2: Find all UHD Units (aka empty search)

<https://paul.ovpr.uga.edu/UHDService/?action=getUnits>

Action getParentUnit

When using action=getParentUnit, you can use the following parameters:

- reportingType : choose which reporting structure the parent should be taken from. It defaults to "Administrative"
- unitNum: the UHD Unit ID of the child unit
- budgetCode: the budget code of the child unit

Example 1: Find the parent unit for budget unit 005 under the Budgetary Reporting Structure

<https://paul.ovpr.uga.edu/UHDService/?action=getParentUnit&budgetCode=005&reportingType=Budgetary>

or equivalently

<https://paul.ovpr.uga.edu/UHDService/?budgetCode=005&reportingType=Budgetary> (omits the action parameter)

Appendix E. UHD JSON Web Service

Purpose

The JSON web service provides a *complete* list of units reporting to any specified UHD unit in any specified Reporting Structure at any particular date and whether each unit is of a Unit Type specified in the web service call.

Included for each unit in the response

- UHD Unit ID
- UHD Unit Long Name
- Parent Unit UHD ID
- whether that unit is of the specified unit type
- These data for each child of the UHD Unit

Possible Uses

A subset of the UHD database can be constructed for use in other applications.

Format of JSON Call

The URL for calling the webservice would be a GET request. Following is the URL.

<http://paultesting.ovpr.uga.edu/reteasy/UHDServices/UHDService/{unitID}/{reportingStructure}/{unitType}/{date}/{unitStatus}>

The URL would return a JSON response object.

The following parameters need to be provided in the URL:

UNIT ID
REPORTING STRUCTURE
UNIT TYPE
DATE
UNIT STATUS

Sample JSON Call

<http://paultesting.ovpr.uga.edu/UHDHierarchy/UHDServices/UHDService/1/4/30/10.17.2014/Official>

where:

1 =UHD id of the University of Georgia (required field)
4 =foreign key of UHD reporting Structure "OVPR Transmittal" (required field)
30 =foreign key of UHD unit type "Elements Primary Group" (required field)
10.17.2014 =effective date of values in response (mm.dd.yyyy)
Official =Select "Official" but not "Unofficial" units (required field)

NOTE:

A UHD Unit may have more than one Unit Type(s). This call will respond with the entire (Elements) Reporting Structure beginning with the parent (1) at the top. Those units in the Reporting Structure that have the specified Unit Type will include that Unit Type in the response. Those units in the reporting structure that do NOT have the specified Unit Type will have a null value in the Unit Type field.

Sample JSON Response

```
{
  "UHDSERVICEResponse":{
    "topTreeID":1,
    "topTreeName":"The University of Georgia",
    "hasChildUnits":true,
    "unitType":30,
    "childUnits":[
      {
        "treeID":2,
        "treeName":"Office of the President",
        "hasChildUnits":true,
        "parentID":1
      },
      {
        "treeID":180,
        "treeName":"Equal Opportunity Office",
        "hasChildUnits":false,
        "parentID":2
      }
    ]
  },
  "childUnits":[
    {
      "treeID":181,
      "treeName":"Internal Auditing Division",
      "hasChildUnits":false,
      "parentID":2
    },
    {
      "treeID":182,
      "treeName":"Office of Legal Affairs",
      "hasChildUnits":false,
      "parentID":2
    },
    {
      "treeID":3,
      "treeName":"Office of the Senior Vice President for Academic Affairs and Provost",

```

```
    "hasChildUnits":true,
    "parentID":2,
    "unitType":30,
    "childUnits":[
      {
        "treeID":189,
        "treeName":"Academic Counseling Center for Student Athletes",
        "hasChildUnits":false,
        "parentID":3
      },
      {
        "treeID":302,
        "treeName":"Buckhead Campus",
        "hasChildUnits":false,
        "parentID":3
      },
      {
        "treeID":12,
        "treeName":"College of Agricultural and Environmental Science
s",
        "hasChildUnits":true,
        "parentID":3,
        "unitType":30,
        "childUnits":[
          {
            "treeID":537,
            "treeName":"ASSISTANT DEAN\GRIFFIN CAMPUS",
            "hasChildUnits":false,
            "parentID":12
          },
          {
            "treeID":543,
            "treeName":"BAMBOO FARM CES",
            "hasChildUnits":false,
            "parentID":12
          },
          {
            "treeID":208,
            "treeName":"CAES Academic Programs Support",
            "hasChildUnits":false,
            "parentID":12
          },
          {
            "treeID":760,
            "treeName":"CAES Business Office",
            "hasChildUnits":true,
```

```
    "parentID":12,
    "childUnits":[
      {
        "treeID":529,
        "treeName":"CAES BUSINESS OFFICE-CES",
        "hasChildUnits":false,
        "parentID":760
      },
      {
        "treeID":360,
        "treeName":"CAES BUSINESS OFFICE-INSTRUCT",
        "hasChildUnits":false,
        "parentID":760
      },
      {
        "treeID":404,
        "treeName":"CAES BUSINESS OFFICE-RESEARCH",
        "hasChildUnits":false,
        "parentID":760
      }
    ]
  },
  .
  .(text deleted to simplify example response)
  .
  {
    "treeID":16,
    "treeName":"College of Education",
    "hasChildUnits":true,
    "parentID":3,
    "unitType":30,
    "childUnits":[
      {
        "treeID":87,
        "treeName":"Department of Career and Information Studie
s",
        "hasChildUnits":false,
        "parentID":16
      },
      {
        .
        .(text deleted to simplify example response)
        .
      }
    ]
  }
}
```