# 2 Explorers

There are two explorers that you can use. The organisation Explorer and the Mini Explorer.

The whole area of the Organisation Structure is controlled using effective dates. Information that is added, amended, or deleted is recorded as a change on that specific date. It is important that the date selected when using the organisation explorer is the correct one, as the organisation will differ from day to day.

2.1 Organisation Explorer

You can use the Organisation explorer to display the units, posts and positions within the University and how they have been organised within Trent.

1. Select University of Cambridge
2. Select Organisation Explorer
3. The top level of the organisation is displayed first with a plus icon next to it
    ⊞ 🖳 University of Cambridge . The plus sign indicates that there are further items to be displayed under this node. Click the plus sign to display the nodes.

When viewing the structure in the organisation explorer, the appearance of a plus icon ⊞ 🖧 next to any item indicates hidden items below the level displayed.

Clicking the plus icon will expand the diagram to display the subordinate components. When the selected item is fully expanded, the plus icon ⊞ changes to a minus icon ⊟

Clicking the minus ⊟ icon condenses the item again.

When you reach the node that you are interested in, click on it.
The screen will then change as follows:

a) Trent will open a new View (B) leaving the original view (A) unchanged

b) The Object pane will change to a Search screen (C) for the type of object that you selected.

c) The Action pane (D) changes to display all of the actions that you can perform against that object.
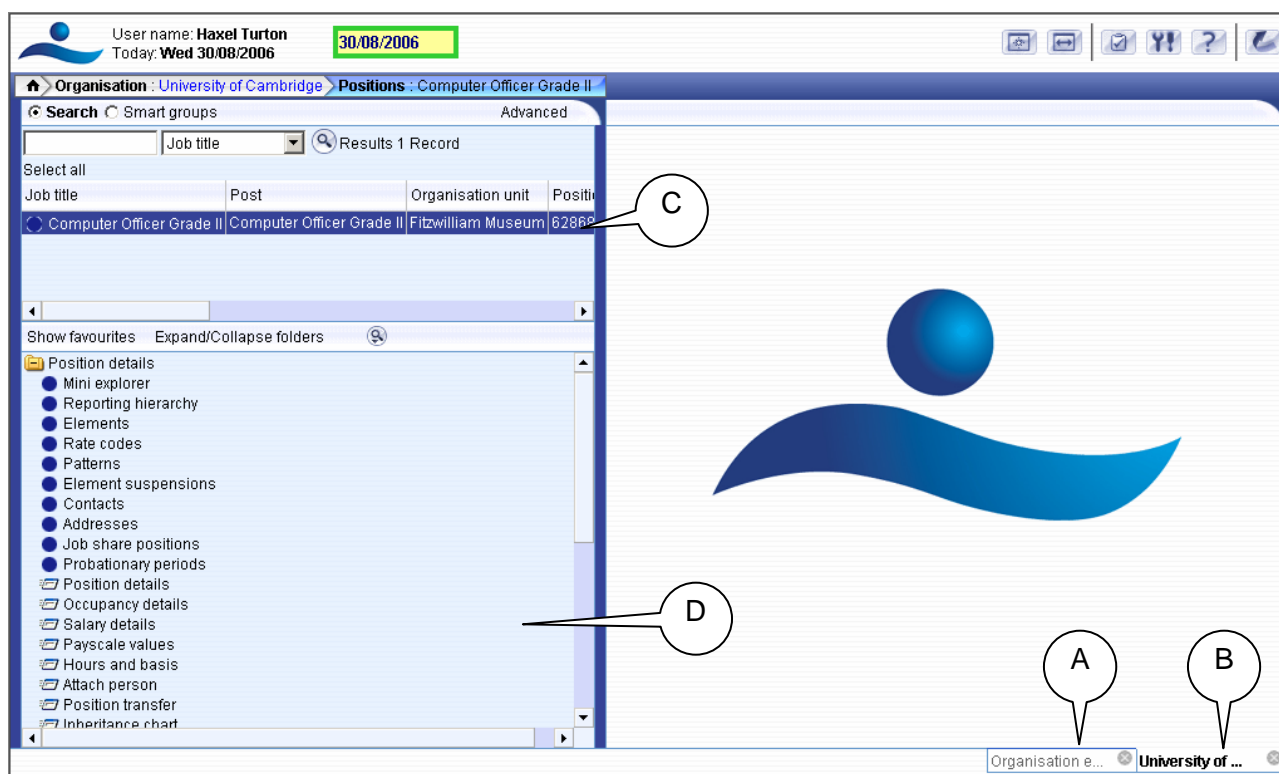
You can now select any of the options available to you from the navigation displayed. The display will vary depending on the type of object that you selected.

It is suggested that you use the Organisation explorer only to identify an area of the University structure to initialise a search procedure. To add or maintain items search for the unit, post or position and click the Mini explorer link in the action pane.

2.2 Mini Explorer

The Mini Explorer allows you to add new items to the Organisation structure as required and to view and maintain Unit, Post and Position details of the organisation structure for a specific area in the object pane.

As the whole structure of the University is so large it is easier to create, amend or view the specific area of the organisation structure you require using the Mini Explorer.

The mini explorer options are available for each of the different components that make up the structure (Units, Posts and Positions), and can be accessed in the relevant folder.
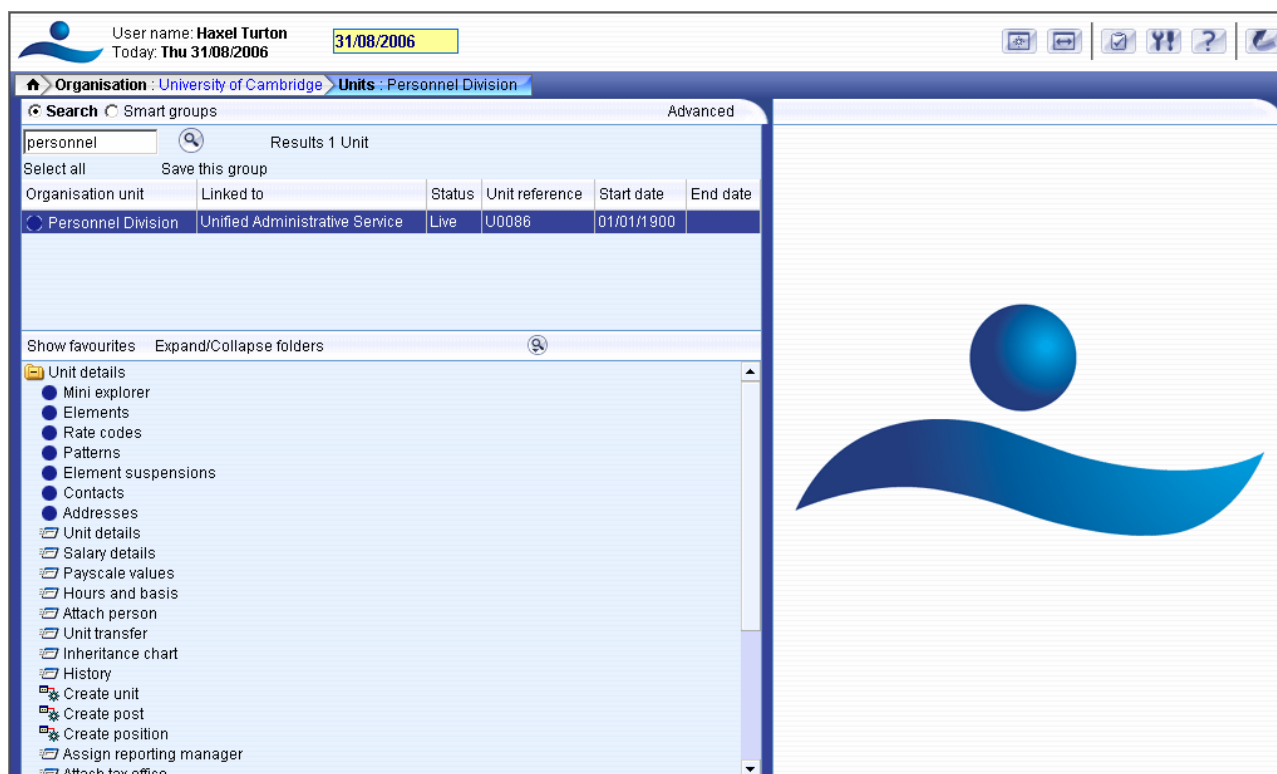
Use the search facility to locate the item you require. (See the introduction manual for more information about performing searches). Select from the object pane the item you wish to enquire on and click the ● Mini explorer link. The structure icon of the selected item will appear in the object pane.

Like the organisation explorer, the mini explorer structure diagram can be expanded by clicking the plus ⊞ icon next to items that contain lower levels.

People

The mini explorer can also be used to access details of a post, position or person (contract). The explorer view will appear within the Object pane. If you need to add, amend or view details within the mini explorer you can click on the relevant item and the appropriate folder items will be displayed in the Action Pane as usual.
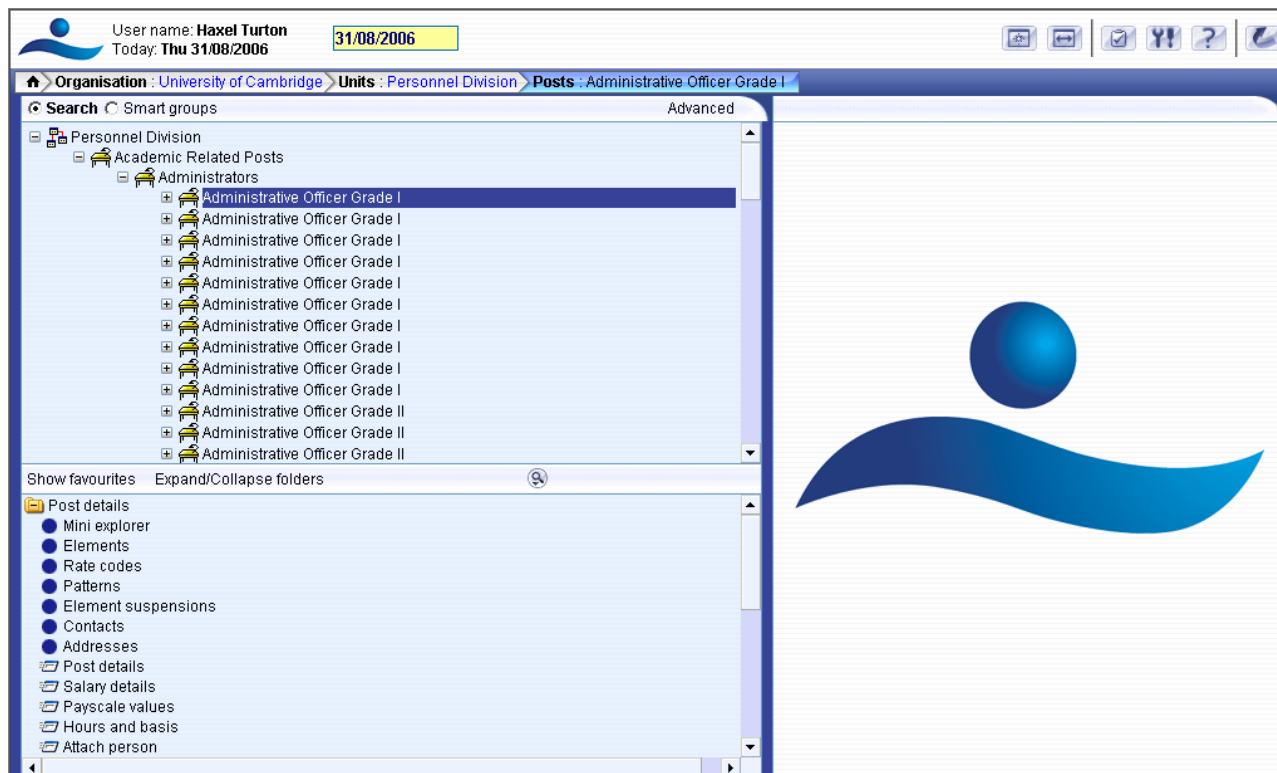
2.2.1 To maintain existing data

If you need to modify existing structure components select the required item in the object pane and the related function will become available in the action pane.

Selecting a person in the object pane will make person related options available in the action pane. Selecting unit, post or position in the object pane will update the action pane to display the available options for the unit, post or position respectively.

2.2.2 Amending or entering new details

Select the item to be modified in the object pane and then click the required item details in the action pane. Existing information will be shown on the function details page in the display pane, where it can be amended as necessary.

When you have completed an entry or amendment, click **Save** in the display pane to save the changes.