Esploro Essentials: Entities

Organizational Units

Institutions consist of multiple organizational units. These units are arranged in a hierarchical structure that represents administrative and conceptual relationships. Esploro’s Organizational Unit tree visualizes the hierarchy and shows the divisional structure of your organization. Here we see that Esploro University contains many faculties, schools, and departments. For example, the College of Medicine, which itself contains sub-units.

When an institution first starts working with Esploro, Ex Libris implementation helps set up the initial organizational unit structure.

Administrators who have the Organizations Manager role can make changes to your organizational unit information, as we will explain in this video.

This Organizational Unit management page is found in the Esploro Research Information Hub. Open the Research Management Menu and under Organization select Manage Organizational Units. Click a unit name to see more information in a pane to the right. If you need to change the structure itself, you can use these buttons to Add a sub-unit or Move to another parent.

Scroll through the sections or click a heading to jump to that section.

You have the option to add many types of information to this record.

If you have multiple languages enabled, then you can add the information in each language.

The sections include general information, visibility settings, alternate names, descriptions, contact information, files and links, and even Pivot funding searches. For more information about these fields, see Esploro Online Help.

Let’s look at the Visibility Settings. These affect what visitors see on your research portal.

Activate Display in portal unit tree if you want this organizational unit to appear in the list of units on your research portal. By default, your portal will only display units that have this option activated and have research outputs or researchers to show. Activate Always display in portal unit tree if you want the name of this unit to appear, even if it has no associated research output or researchers.

You can also choose whether to Display a homepage for this unit or not.

To enable Organizational Unit homepages in your portal, you will need to activate the Homepage tab. This is found in Configuration > Portal and Profiles > Research Portal > Organizational Unit Tree.

Let’s see an example Organizational Unit Homepage on the portal.

This is the institution’s research portal homepage. Navigate to the organizational units page. Here you can see the units tree, which you can expand to see sub-units. Click a unit to see its associated information. Click the Homepage tab. This page displays some of the information you added in the research Hub.

This is the Organizational Unit Name, which is configured in the General information section.

In the files section, you can add images and select the type. A Logo type file appears here, while a Gallery type file appears here. This is the General Description, and this is a link with content type Homepage.

You can also bulk update multiple units. Select units with checkmarks. Then click Change status or Update visibility.

Organizational Unit management gives you control over the structure of your institutional divisions and what you display about them on your Portal.