![DXTERA INSTITUTE℠]

## Next Generation Integration Scorecard
## Personnel Functional Area

The Personnel Functional Area defines people and organizations.

# *Person*

| |
|---|
| A Person is a people. Persons define identification information such as names and institutional identifiers. |
| Also known as: *People (plural), Steve, Allison, Mom, etc.* |

❏ Read Operations for Persons:                                                    *Score*

| | |
|---|---|
| ❏ Get Persons given unique ids | |
| ❏ Get all the Persons in a system or Catalog | |
| ❏ Query (Search) Persons based on attribute-based query terms or keywords | |
| ❏ Register for notifications that Persons have been created, updated or deleted | |

❏ Write Operations for Persons:

| | |
|---|---|
| ❏ Create, Update and Delete Persons | |
| ❏ Add an alias Id to reference an existing Person | |
| ❏ Organize Persons into catalogs | |

Minimally Supported Attributes of Persons:

| |
|---|
| ● A unique and permanent identifier |
| ● The name of the Person |
| ● A description of the Person |
| ● The type of this Person: human, martian, virtual, avatar |
| ● The salutation or title of this Person (Mr., Dr., Ms.) |
| ● The given name of the Person |
| ● The preferred forename or mononym of this Person |

| |
|---|
| ● Additional forenames this Person is or was known by |
| ● Middle names of the Person |
| ● The surname of the Person |
| ● Additional surnames this Person is or was known by |
| ● The generation qualifier of the Person |
| ● The qualification suffix of this Person (MD, Phd). |
| ● The birth date of this Person, if available |
| ● A death date of this Person, if available |
| ● The institutional identifier for this Person |

## *Organization*

| |
|---|
| An Organization is a hierarchical structure of organizational units. For this Functional Area it is assumed that every Catalog contains one Organization hierarchy. |
| Also known as: *Company, Firm, Corporation, Institution, Group, Department, School* |

❏ Read Operations for *Organizations*:                                                    *Score*

| | |
|---|---|
| ❏ Get Organizations given unique ids | |
| ❏ Get all the Organizations in a system or Catalog | |
| ❏ Query (Search) Organizations based on attribute-based query terms or keywords | |
| ❏ Register for notifications that Organizations have been created, updated or deleted | |
| ❏ Traverse hierarchical relationships between Organizations | |
| ❏ Register for notifications that OrganizationAncestors have been created, updated or deleted | |
| ❏ Register for notifications that OrganizationDescendants have been created, updated or deleted | |

❏ Write Operations for *Organizations*:

| | |
|---|---|
| ❏ Create, Update and Delete Organizations | |
| ❏ Add an alias Id to reference an existing Organization | |
| ❏ Edit hierarchical relationships between Organizations | |
| ❏ Organize Organizations into catalogs | |

Minimally Supported Attributes of *Organizations*:

| |
|---|
| ● A unique and permanent identifier. |
| ● The name of the Organization |
| ● A description of the Organization |
| ● The type of the Organization: company, university, school, department, team, thesis committee |
| ● A display label for this Organization |
| ● The effective date range of this Organization, if applicable |

## *Position*

| |
|---|
| A Position is a job description performed in the context of an Organization. A Position has a job level represented using a Grade, optional salary range, as well as a set of learning Objectives used to convey the desired qualifications for the position.<br><br>Positions are not canonical in that they belong to a specific Organization although Positions from parent Organizations may be visible to its sub-organizational units. A canonical position that can be reused across Organizations can be represented with a combination of the type of Position and Grade level. |
| Also known as: *Job* |

❏ Read Operations for *Positions:*                                                        *Score*

| | |
|---|---|
| ❏ Get Positions given unique ids | |
| ❏ Get all the Positions in a system or Catalog | |
| ❏ Query (Search) Positions based on attribute-based query terms or keywords | |
| ❏ Register for notifications that Positions have been created, updated or deleted | |
| ❏ Register for notifications that Positions have been created, updated or deleted for Organizations | |

❏ Write Operations for *Positions:*

| | |
|---|---|
| ❏ Create, Update and Delete Positions | |
| ❏ Add an alias Id to reference an existing Position | |
| ❏ Organize Positions into catalogs | |

Minimally Supported Attributes of *Proficiencies:*

| |
|---|
| ●    A unique and permanent identifier |
| ●    The name of the Position |
| ●    A description of the Position |
| ●    The type of the Position: administrative, contract, part-time-no-benefits |
| ●    The Organization to which the Position is assigned |
| ●    The Title of the Position |
| ●    The Level of the Position |
| ●    Qualifications (Learning Objectives) required for the Position, if available |
| ●    The target number of Appointments desired for this Position |
| ●    The Required Percentage Commitment associated with the Position |
| ●    The Low of the Salary Range of the Position |
| ●    The Midpoint of the Salary Range of the Position |
| ●    The High of Salary Range of the Position |
| ●    The frequency of Compensation associated with the Position |
| ●    Whether this Position is FLSA exempt |
| ●    Whether this position is eligible for benefits |
| ●    The Benefits Type associated with the Position, if applicable |
| ●    The effective date range of this Position |

## *Appointment*

| |
|---|
| An Appointment is a relationship between a Person and a Position. The effective dates of an Appointment may be used to indicate the term of employment. |
| Also known as: |

❑ Read Operations for *Appointments:*                                     *Score*

| | |
|---|---|
| ❑   Get Appointments given unique ids | |
| ❑   Get all the Appointments in a system or Catalog | |
| ❑   Get Appointments for Persons | |
| ❑   Get Appointments for Positions | |

| | |
|---|---|
| ❏ Query (Search) Appointments based on attribute-based query terms or keywords | |
| ❏ Register for notifications that Appointments have been created, updated or deleted | |
| ❏ Register for notifications that Appointments for Persons have been created, updated or deleted | |
| ❏ Register for notifications that Appointments for positions have been created, updated or deleted | |

❏ Write Operations for *Appointments:*

| | |
|---|---|
| ❏ Create Appointment for Person and Position | |
| ❏ Update and Delete Appointments | |
| ❏ Add an alias Id to reference an existing Appointment | |
| ❏ Organize Appointments into catalogs | |

Minimally Supported Attributes of *Appointments:*

| |
|---|
| ● A unique and permanent identifier |
| ● The name of the Appointment |
| ● A description of the Appointment |
| ● The type of the Appointment |
| ● The Person associated with the Appointment |
| ● The Position associated with the Appointment |
| ● The Percentage Commitment associated with the Appointment |
| ● The Title of the Appointment |
| ● A Salary associated with the Appointment, if available |
| ● The basis of the Salary in number of months per year |
| ● Effective date range of this Appointment |
| ● The reason this Appointment ended, if applicable |

## *Catalog*

| |
|---|
| A directory or other kind of organization for related entities. Such a grouping serves to separate Persons, Positions and Appointments managed by different organizations or departments and to scope searches. |
| Also known as: Realm |

❏ Read Operations for *Catalogs:* *Score*

| | |
|---|---|
| ❏ Get Catalogs given unique Ids | |
| ❏ Get all the Catalogs in a system or Catalog | |
| ❏ Query (Search) Catalogs based on attribute-based query terms or keywords | |
| ❏ Traverse Hierarchical relationships between Catalogs | |
| ❏ Register for notifications Catalogs have been created, updated or deleted | |
| ❏ Register for notifications that hierarchical relationships between Catalogs have been created, updated or deleted | |

❏ Write Operations for *Catalogs:*

| | |
|---|---|
| ❏ Create, Update and Delete Catalogs | |
| ❏ Add an alias Id to reference an existing Catalog | |
| ❏ Manage Hierarchical relationships between Catalogs | |

Minimally Supported Attributes of *Catalogs:*

| |
|---|
| ● A unique and permanent identifier. |
| ● The name of the Catalog |
| ● A description of the Catalog |
| ● The type of the Catalog |
| ● The provider of this Catalog |
| ● Any available branding for this Catalog, for example, an organizational logo |
| ● Any licensing (terms of usage) associated with this Catalog |