

# Organizational Unit Edits

## Article Number

000088797

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### Information

From time-to-time institutions will have the need to re-organize their institutional structure. These could be re-organizing how various units report to one another, the name of a unit, or deleting a unit altogether. This article walks through each of these scenarios as it relates to the organizational structure.

## KEYS TO SUCCESS

They are few keys points you will want to keep in mind when preparing to make edits to your institution's organizational structure inside of Planning.

### **CHANGES ARE NOT APPLIED ACROSS MULTIPLE TIME PERIODS:**

It is important to know that changes to the organizational structure inside of Planning are only made in the time period that is selected. It is for this reason that it is not recommended that campuses add multiple time periods into the future. The easiest way to keep your organizational structure up-to-date from one year to the next is to simply make any changes to your current time period and copy that tree to the next newly created time period. This will ensure changes made are reflected in the newly copied organization structure.

### **CHANGES MAY IMPACT USER PERMISSIONS:**

Depending on the changes you intend to make, you may need to revisit user permissions in addition to re-organizing or updating your institution's organizational structure. Since permissions are inherited, it is possible that some users may lose access to units that are moved. This would happen if you move a child unit from a parent unit. Users at the parent level would then lose their access to the child unit, as the child unit is no longer inheriting permissions from its parent and that user would need to be re-assigned to the child unit.

It is important to note that when adding a unit(s) to the organizational tree they will automatically inherit any permission set for the user in the parent organizational unit. This means that as soon as the unit is added user may have access to it. It is for this reason we recommend you locking the year in which you are working. This will ensure that no users mistakenly add plan data that would prevent you from deleting a unit.

### **BE SURE TO LOOK AT THE TIME PERIOD IN WHICH YOU ARE MAKING UPDATES:**

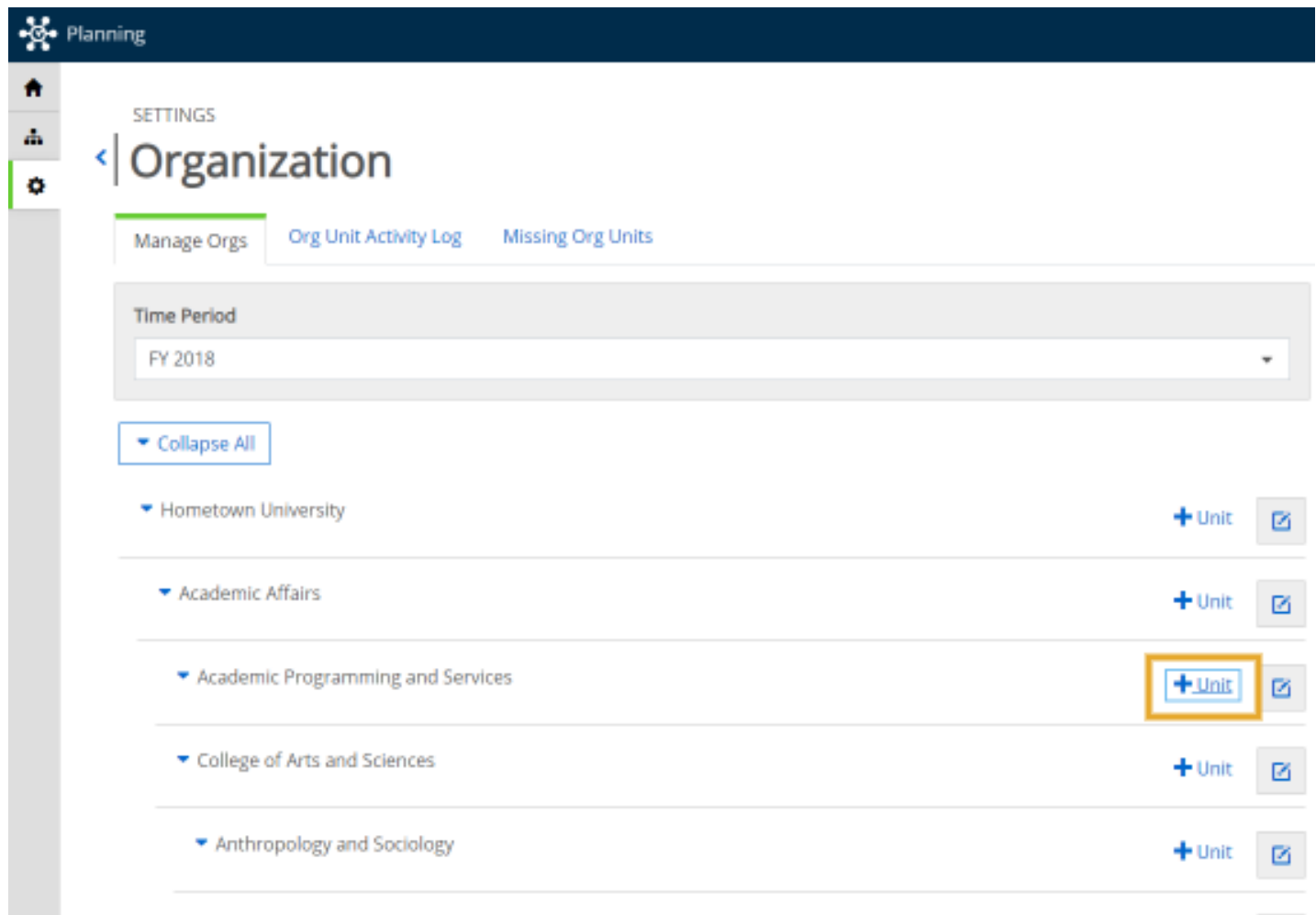
This is important, as any organizational changes happen in real time. For example, if you are making adjustments to an organizational tree for a particular year and the changes are not approved or yet set in stone you will probably not want users adding data to units within that year. If they users do add data and you need to go back and delete a unit, you will need to have them delete the data they had just entered to do so.

## MANAGING ORGANIZATIONAL UNITS

## ADDING A UNIT

Adding a unit to an organizational tree is very simple. Before you get started you will want to think about where you would like to add the unit and if it should be nested below any existing units or units you plan to add.

Once you have determined where in the organizational structure you would like to add the unit and confirmed that you are applying changes to the appropriate time period, simply click the + Unit button located to the right of the parent unit card. For example, by clicking on + Unit at the Academic Programming and Services card, then you will be able to add a unit within/under Academic Programming and Services.



The screenshot displays the 'Organization' settings page in the Planning application. The page is titled 'Organization' and includes a 'Time Period' dropdown set to 'FY 2018'. A 'Collapse All' button is visible. The organizational structure is listed as follows:

- Hometown University
- Academic Affairs
- Academic Programming and Services (highlighted with a yellow box around the '+ Unit' button)
- College of Arts and Sciences
- Anthropology and Sociology

Each unit has a '+ Unit' button and an edit icon to its right.

After clicking on + Unit, you will be able to type in the name of the unit you would like to add to the designated time period. If this is a brand-new unit, never before incorporated into your Planning org structure, simply select the radio button at the bottom where it says *Create new unit* (see below) and then select *Add Unit*.

Planning

SETTINGS

# Organization

Manage Orgs | Org Unit Activity Log | Missing Org Units

Time Period

FY 2020

▼ Collapse All

- ▼ Hometown University
  - ▼ Academic Affairs
    - ▼ Academic Programming and Services
      - ▼ Records and Registration
      - ▼ College of Arts and Sciences
        - ▼ Anthropology
        - ▼ Art
        - ▼ Chemistry

Time Period: FY 2018

Parent Org Unit: Academic Programming and Services

Org Unit Name:

Advising

### Similar Org Units

Advising

Exists in: FY 2017

Not finding an existing Org Unit to use?

Create Org Unit: **Advising**

Cancel Add Unit

After typing in the name of the new unit, you will see any similarly named units that already exist in other time periods. In the example below, we see that Advising already exists in FY 2017. If you would like that same exact unit to be incorporated into FY 2018, select the radio button across from the appropriate similar unit (see below) then select *Add Unit*.

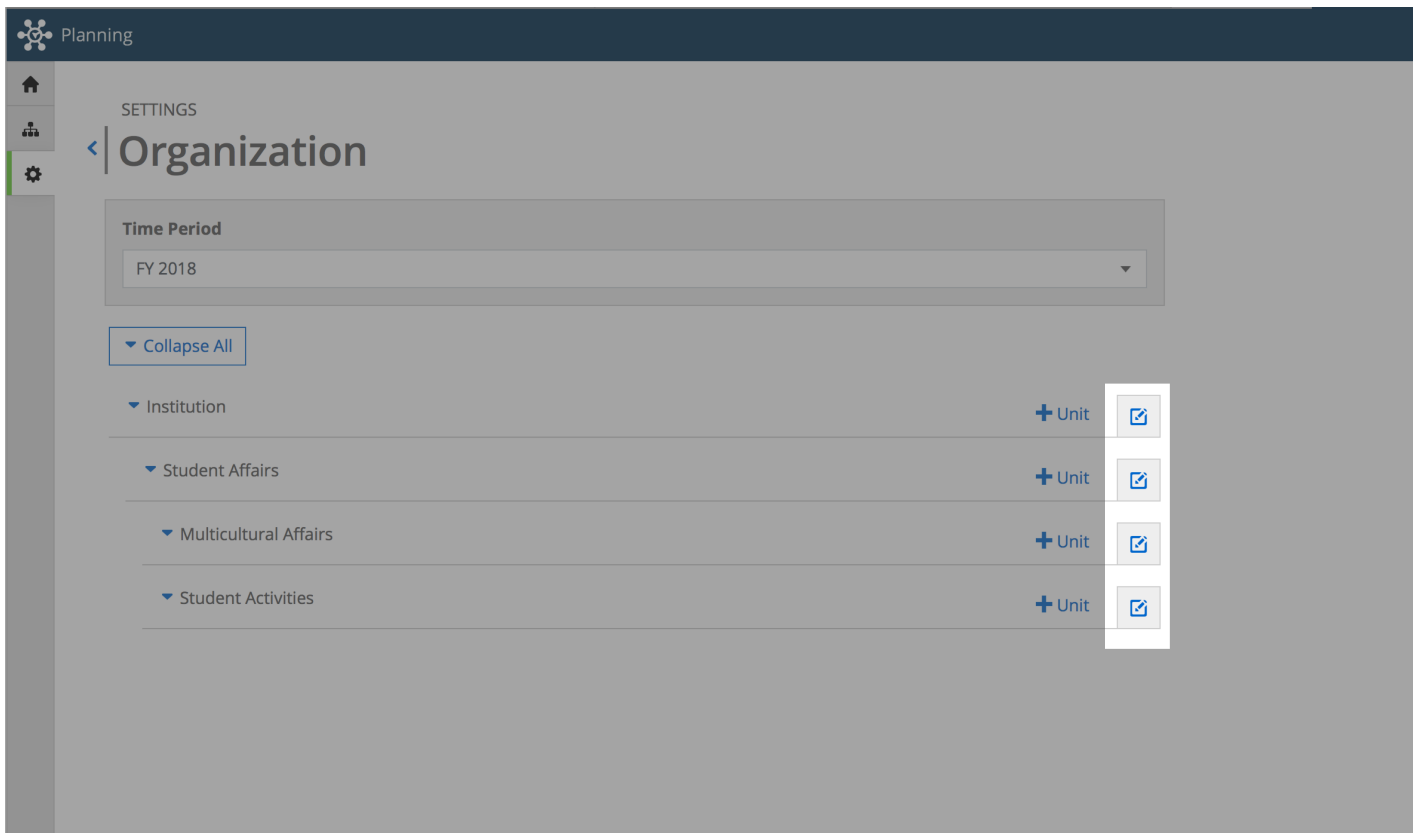
**Note:** Adding the existing unit to a new time period is the only way to maintain continuity for that unit across time periods in the site. This includes common user permissions and the ability to pull longitudinal reports. If you have questions about which option is most appropriate for you, please reach out to your Planning consultant.

The screenshot shows the 'Planning' system interface. The main page is titled 'Organization' under 'SETTINGS'. It features a navigation menu with 'Manage Orgs', 'Org Unit Activity Log', and 'Missing Org Units'. The 'Time Period' is set to 'FY 2020'. A tree view shows the organizational structure starting with 'Hometown University', followed by 'Academic Affairs', 'Academic Programming and Services', 'Records and Registration', 'College of Arts and Sciences', 'Anthropology', 'Art', and 'Chemistry'. Each unit has a '+ Unit' button and an edit icon. An 'Add Org Unit' modal is open on the right, showing the following details: 'Time Period: FY 2018', 'Parent Org Unit: Academic Programming and Services', and 'Org Unit Name: Advising'. The modal also displays a 'Similar Org Units' section with 'Advising' (Exists in: FY 2017) and a radio button. Below this, it asks 'Not finding an existing Org Unit to use?' and offers to 'Create Org Unit: Advising' with another radio button. At the bottom of the modal are 'Cancel' and 'Add Unit' buttons.

## DELETING A UNIT

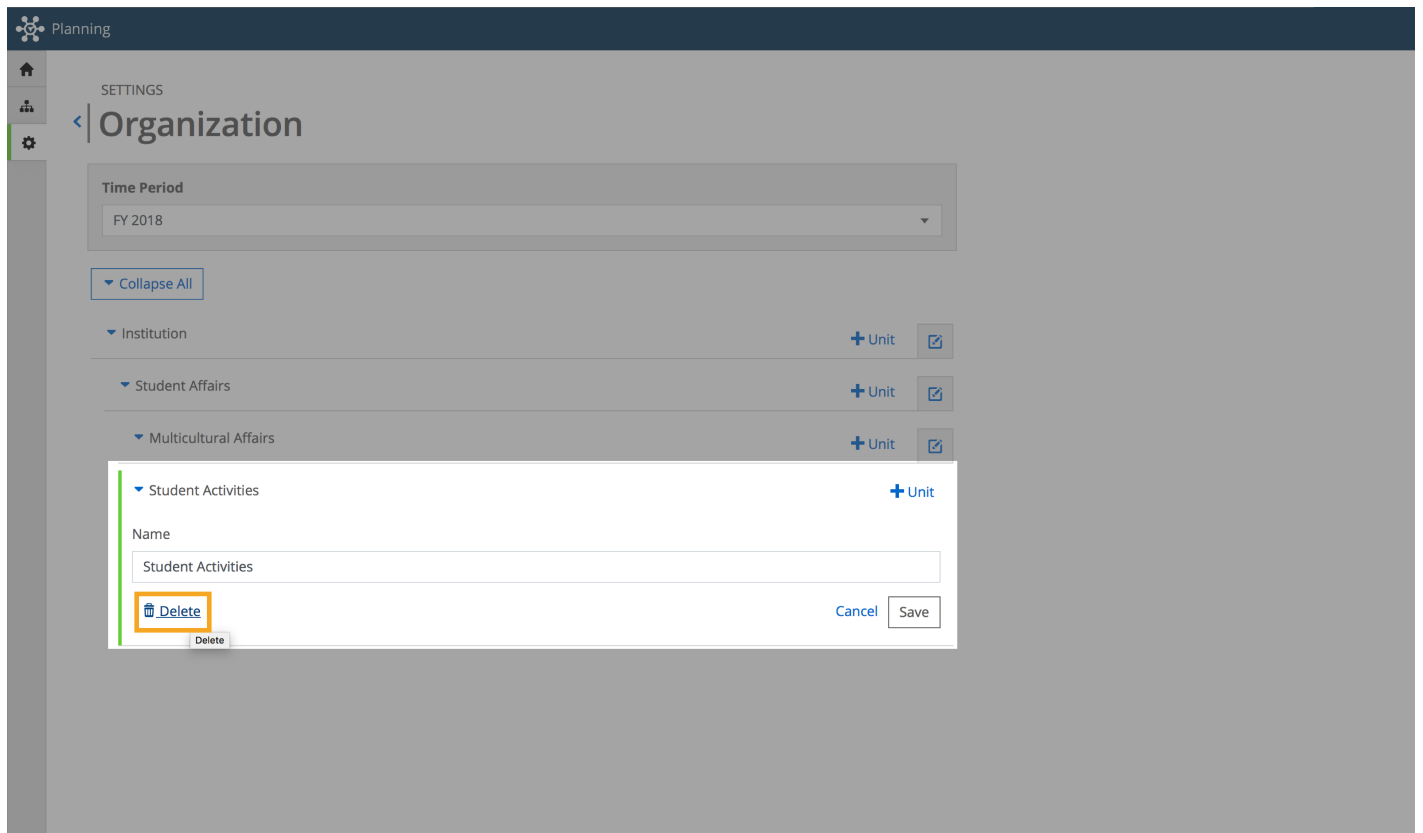
From time-to-time, the need to delete a unit from the organizational structure may be required to accurately reflect changes that have taken place on campus. This is easily done within Planning.

In order to delete a unit from the organizational tree within the given time period, simply clicking on the edit icon located to the far right side of the organizational units card, as shown in the screenshot below.



Upon clicking this button, a sub-menu will open for the given unit. Here you will see the option to delete the unit from the selected time period and organizational structure.

It is important to know that if any plan data exists within the unit for the given time period will need to be deleted first before you have the ability to delete the unit. If you choose to delete the plan data in order to remove the unit, it is important that you know this cannot be undone and the data is deleted forever.



## MOVING A UNIT

Moving a unit within your institution's organizational structure is a simple drag and drop process. Units can only be moved within the selected year and cannot be moved from one time period to another.

To begin re-organizing your institution's organizational tree, simply click and drag the unit from its current location to the desired location. In the example below, we have four units: Institution, Student Activities, Student Affairs and Multicultural Affairs.



SETTINGS

# Organization

Time Period

FY 2018

▼ Collapse All

▼ Institution	+ Unit	<input checked="" type="checkbox"/>
▼ Student Activities	+ Unit	<input checked="" type="checkbox"/>
▼ Student Affairs	+ Unit	<input checked="" type="checkbox"/>
▼ Multicultural Affairs	+ Unit	<input checked="" type="checkbox"/>

As it is currently organized Student Affairs is nested below Student Activities and Multicultural Affairs is nested below Student Affairs. What we would really like to see if both Student Activities and Multicultural Affairs nested below Student Affairs.

In order to accomplish this, we need to click and drag Student Affairs below Institution. You will know which unit you have select by a green outline surround the units card within the tree. Below you can see that we have clicked on “Student Activities.”



SETTINGS

# Organization

Time Period

FY 2018

Collapse All

Institution

+ Unit



Student Activities

Student Activities

+ Unit

+ Unit



Student Affairs

+ Unit



Multicultural Affairs

+ Unit



In order to nest our selected unit within another, you will need to drag it over the card of the unit where you would like it to be placed. Here we can see we have dragged the Student Activities card over Student Affairs, which has activities a green border around the Student Affairs card.



SETTINGS

# Organization

Time Period

FY 2018

Collapse All

Institution

+ Unit



Student Activities

+ Unit



Student Affairs

Student Activities

+ Unit

+ Unit



Multicultural Affairs

+ Unit



Upon dropping the Student Activities card on the Student Affairs card we see now that the Student Activities unit has now become nested below Student Affairs. As changes are made to the organizational chart they are automatically saved.

If other time periods within Planning needed such updates, you would then need to go to each time period and perform the same actions, as reorganizing units across time periods is not a supported function.

The screenshot shows the 'Planning' application interface. At the top, there is a dark blue header with a gear icon and the word 'Planning'. Below this is a sidebar with a home icon, a user icon, and a gear icon. The main content area is titled 'SETTINGS' and 'Organization'. A 'Time Period' dropdown menu is set to 'FY 2018'. Below this is a 'Collapse All' button. The main area displays a list of organizational units, each with a dropdown arrow, a '+ Unit' button, and a checkmark icon. The units listed are: Institution, Student Affairs, Multicultural Affairs, and Student Activities. The 'Student Activities' unit is nested under 'Student Affairs'.

Unit Name	+ Unit	Checkmark
▼ Institution	+ Unit	☑
▼ Student Affairs	+ Unit	☑
▼ Multicultural Affairs	+ Unit	☑
▼ Student Activities	+ Unit	☑

## ACTIVITY LOG

The Org Unit Activity Log will show you all changes made to your organizational structure beginning with the most recent changes. It will also show you when changes were made and by whom they were made.



SETTINGS







# Organization

[Manage Orgs](#) [Org Unit Activity Log](#) [Missing Org Units](#)

## Org Unit Activity Log Across All Time Periods

Search Org Units:  [Clear Search](#)

[Filter](#)

-  **Created** [Entrepreneurship](#) was created in FY 2019 on 8/17/18 by CampusLabs Administrator
-  **Moved** [Financial Aid](#) parent org unit changed from Enrollment Management to Student Support Services in the fiscal year FY 2019 on 8/17/18 by CampusLabs Administrator
-  **Added** [New Student Orientation](#) was added in FY 2018 on 8/17/18 by CampusLabs Administrator
-  **Added** [Spanish Language and Literature](#) was added in FY 2018 on 8/17/18 by CampusLabs Administrator
-  **Deleted** [Italian Language and Literature](#) was deleted in FY 2019 on 8/17/18 by CampusLabs Administrator
-  **Added** [Advising](#) was added in FY 2018 on 8/17/18 by CampusLabs Administrator

If you need to look at the changes made to a specific unit across time, utilize the search functionality.



SETTINGS

# Organization

[Manage Orgs](#) [Org Unit Activity Log](#) [Missing Org Units](#)

## Org Unit Activity Log Across All Time Periods

Search Org Units:  [Clear Search](#)

[Filter](#)

[Back to List](#)

1 unique org units currently contain --- or at one time contained "new student" in their names.

### New Student Orientation

**+ Added** [New Student Orientation](#) was added in FY 2018 on 8/17/18 by CampusLabs Administrator

**Deleted** [New Student Orientation](#) was deleted in FY 2020 on 7/30/18 by CampusLabs Administrator

**Created** [New Student Orientation](#) was created in FY 2019 on 7/18/18 by CampusLabs Administrator

[See All Activities](#)

You can also utilize filters to view a specific type of org structure change. For example, you could utilize the filter to see units that have been deleted across the various time periods in the site.



SETTINGS

# Organization

Manage Orgs   **Org Unit Activity Log**   Missing Org Units

## Org Unit Activity Log Across All Time Periods

Search Org Units:  Clear Search

**Filter**

- Added
- Created
- Deleted
- Renamed
- Moved

Clear Filters Apply

- Deleted [Italian Language and Literature](#) was deleted in FY 2019 on 8/17/18 by CampusLabs Administrator

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- Added [Advising](#) was added in FY 2018 on 8/17/18 by CampusLabs Administrator

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- Deleted [Advising](#) was deleted in FY 2020 on 8/17/18 by CampusLabs Administrator

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- Deleted [Advising](#) was deleted in FY 2019 on 8/17/18 by CampusLabs Administrator

## FIX MISSING ORG UNITS

As noted above, when you add units you are adding them to the designated time period. If those units are then missing from other relevant time periods, the Fix Missing Org Units tab allows you to be carry those units forward (or backward) into other timer periods. This step is often necessary if you have several time periods into the future incorporated into the site

Below we see a summary of all units that exist in FY 2018 that are missing from FY 2019.



SETTINGS

# Fix Missing Org Units

Manage Orgs   Org Unit Activity Log   **Missing Org Units**

## Check for missing org units between two time periods.

Compare the org structures of two time periods. Add any missing org units from one to the other.

### Check for missing org units from:

The following org units need to be added in order to copy all of the items from FY 2018 to FY 2019

### Select missing org unit to add to FY 2019

5 Missing Org Units

- [Advising from FY 2018](#)

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- [Human Performance from FY 2018](#)

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- [Biology from FY 2018](#)

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- [English Language and Literature from FY 2018](#)

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- [PA Program from FY 2018](#)

### Add Missing Org Units to:

- ▼ Hometown University

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- ▼ Academic Affairs

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- ▼ Academic Programming and Services

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- ▼ Records and Registration

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- ▼ College of Arts and Sciences

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- ▼ Anthropology

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- ▼ Art

Some of these units may have been deleted purposefully from FY 2019 and therefore the discrepancy is expected. However, any units from FY 2018 that should also be present within FY 2019 can be seamlessly incorporated by clicking on the unit.



SETTINGS

# Fix Missing Org Units

Manage Orgs   Org Unit Activity Log   **Missing Org Units**

## Check for missing org units between two time periods.

Compare the org structures of two time periods. Add any missing org units from one to the other.

### Check for missing org units from:

The following org units need to be added in order to copy all of the items from FY 2018 to FY 2019

### Select missing org unit to add to FY 2019

5 Missing Org Units

- Advising from FY 2018  
Parent Org: Academic Programming and Services
- Human Performance from FY 2018
- Biology from FY 2018
- English Language and Literature from FY 2018
- PA Program from FY 2018

### Add Missing Org Units to:

- Hometown University
- Academic Affairs
- Academic Programming and Services
- Records and Registration
- College of Arts and Sciences
- Anthropology
- Art
- Chemistry

## KB Product

Planning

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Organizational Unit Edits