

Making Changes to Your Organizational Chart

Article Number

000088695

Information

We recommend finalizing your organizational chart at the start of the Academic Year, before adding in any outcomes or results.

We recommend that you make your changes through Core Data, in order to make them available in additional products. For more information, please refer to our [Core Data support documentation](#). However, if you want to make Outcomes-specific changes, you can do so without affecting other products.

What changes can be made?

There are four general types of changes or modification that can be made

- Additions
- Relocating Organizational Units
- Hiding Organizational Units
- Non-Identifier Changes

Some types of changes, such as moving or hiding organizational units, cannot be made once data has been entered for that organizational unit (or its related units) for that particular Time Period. The system works to protect historical data in your Outcomes platform.

Additions

You can add additional units, courses and sections to your organizational chart via Core Data. The [Organizational Units file](#), [Courses file](#) and [Sections file](#) all work on an add/update protocol. This means you don't have to re-create your entire organizational chart just to make additions. Instead, campuses can prepare the files with the additions only. Once validated and imported through Core Data, you can navigate to **Settings > Organization Tree > Pending Updates > Added to Core Data Management** to sync the additions to Outcomes.

Please [keep the reporting features in mind](#) when thinking about changes and follow the [standard guides provided by Technical Resources](#).

You can also add units manually in Outcomes. We strongly recommend contacting Support about your goals in doing so, as it should only be done in rare cases where adding a unit or course is only needed in Outcomes.

Relocating Organizational Units

You can manually relocate organizational units and courses in your organizational chart. If there is an outcome created in an organizational unit or any of the units/courses within that unit, it cannot be relocated. You must delete the Outcomes data before relocating the unit.

In order to relocate org units or courses, you can navigate to **Settings > Organization Tree**. From there, click on the **Move** action and search for a new parent unit to put it under.

You can relocate organizational units and courses in Core Data, however these relocations are only applied to Outcomes during [the Reinitialization of an Academic Year](#). Reinitializing will permanently delete any Outcomes data added for that year, so we recommend finalizing the location of your courses and org units at the beginning of the Academic Year.

Hiding Organizational Units

Once an Organizational Unit has been created it cannot be deleted. However, you can hide an organizational unit so no one sees it or contributes data to it. Hiding a unit cuts off access to it by any user. When a unit is hidden, anything within that unit will also be hidden; this includes other organizational units, courses, and academic programs. If a campus still wants to access these other units, courses, or programs, they will need to be relocated.

If there is an outcome created in an organizational unit or any of the units/courses within that unit, it cannot be hidden.

In order to hide org units or courses, you can navigate to **Settings > Organization Tree**. From there, click on the **Edit** action, select the **Hide Unit / Course** checkbox and save.

Additionally, the Bulk Hide feature on the Settings > Organization Tree screen will allow you to enter the external identifiers of multiple units, courses, and even sections to hide. Please be aware that sections cannot be unhidden once they are hidden, while units and courses can be hidden/unhidden at any time.

Non-Identifier Changes

Non-identifier changes refer to changes that will not affect reporting functions. This includes changes to the Name, Course Number, Acronym, and Type fields.

	A	B	C	D	E
1	OrgUnitIdentifier	Name	Acronym	ParentIdentifier	Type
2					

- Changing the Name field will change the displayed name of the organizational unit in various places in the platform without affecting reporting capabilities.
- Changing the Acronym and Type does not have any real effect on your Outcomes platform.

These non-identifier changes can be made in Core Data, then synced to outcomes via **Settings > Organization Tree > Pending Updates > Metadata Changes**.

KB Product

Outcomes

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