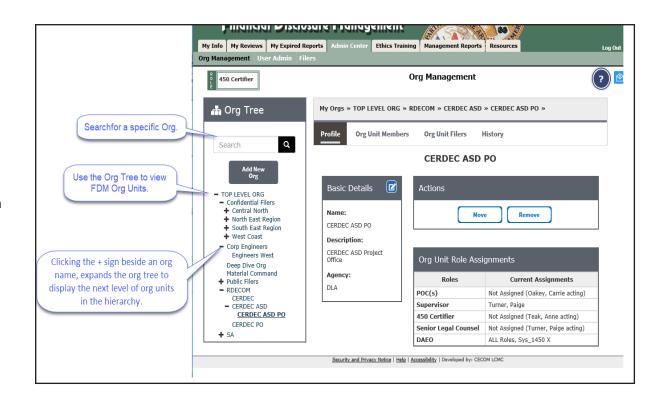## Org Tree

- ◆ The Org Tree is a hierarchical display of the Org Units that you can manage.

- ◆ You can view and manage all Org Units and members within your Org Tree hierarchy.

- ◆ The viewable org unit hierarchy is dependent on your selected role.

- ◆ The initial view of the Org Tree displays your top-level Org Unit and any subordinate Org Units.

Navigating the Org Tree

1. Go to **Admin Center** tab then expand the Org Tree by selecting the **plus sign (+)** beside an Org Unit in your list.

2. Click the **minus sign (-)** beside an Org Unit to collapse or hide subordinate Org Units.

3. Select an Org Unit name to view its Profile.

Searching for an Org Unit:

1. Click the **Admin Center t**ab and then click **Org Management**.

2. In the search box at the top of the Org Tree, begin typing the name of the Org Unit you wish to locate.

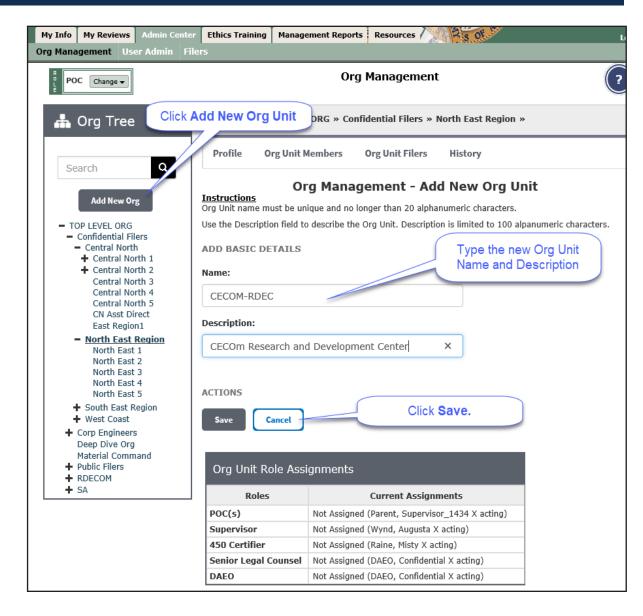3. Click on the Org Unit name once it appears in the search results drop-down field.

Adding New Org Units

Additional Org Units are only necessary when you need different or separate groupings of Filers such as at the beginning of the filing season when you may have new Filers you need to group together.

1. Go to **Admin Center** | **Org Management** then select the Org Unit in the Org Tree where the new Org Unit will be added.

2. Click **Add New Org** and then type the appropriate Name and Description for the new Org Unit.

Org Unit Name and Description

- ◆ The Org Unit Name must be unique and should accurately reflect the Org Unit of filers you supervise.

- ◆ Use the Description field to describe the Org Unit further so you can easily distinguish the Org Unit from others that may have a similar name.

3. When complete, click **Save** then **OK** to confirm the addition of the new Org Unit.

Editing an Org Unit

Editing an Org Unit allows you to change the Org Unit Name and Description.

1. On the Org Unit Profile page, click **Edit button** in the Org Profile Basic Details on the right.

2. Update the Org Unit Name and/or Description as needed and then click **Save**.
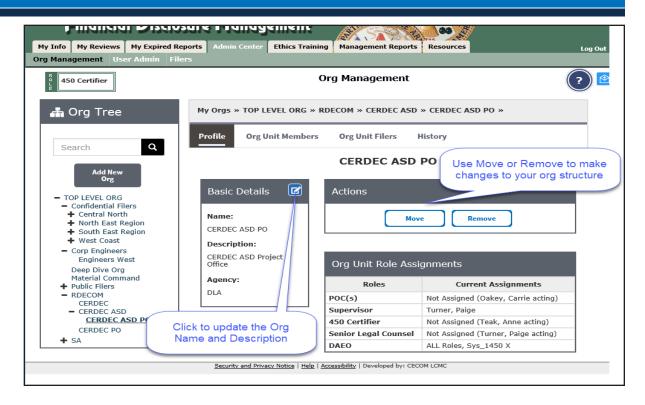
Moving Org Units

Due to changes in your organization, you may need to move an Org Unit. This may change the review chain.
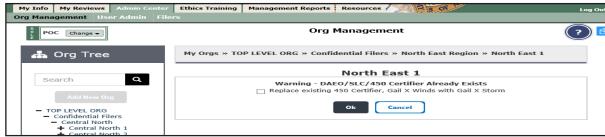
1. On the Org Unit Profile page, click the **Move button** in the Actions column of the Org Unit profile.

2. Select an Org Unit from the Org Tree that you want the moving Org Unit to fall under and then click **OK** to confirm.

   ◆ At times, both Org Units, the one you are moving and the Org Unit you are moving to, may have existing review chain participant associations. Choose from the list of legal reviewers.
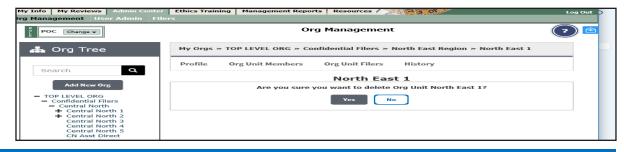
Removing Org Units

Before you can delete an Org Unit, you will need to move any associated Filers and Sub-Org units.

1. On the Org Unit Profile page, click on the button that says **Remove** in the Actions section of the Org Unit profile.

2. Click **Ok** to confirm.

Assigning Org Members to an Org Unit

1. Go to **Admin Center** | **Org Management** then select the Org Unit in the Org Tree where the new Org Member will be added.

2. Click the **Org Unit Members** tab.

3. Click the **+Assign** or **Replace** button to assign or Replace someone as an Org Member.

4. Select the appropriate **Agency Directory** from the drop-down list and then type the new Org Member's e-mail address in the e-mail field then click **Search**.

5. Select the individual whom you wish to add by clicking the **plus (+) sign** beside their name.

Removing Org Members

Removing a review chain participant simply removes their association to a selected Org Unit.

1. Click the **Remove button (X)** next to the Org Member you wish to remove and then click **OK**.

Editing Org Unit Members

1. On the **Org Unit Members** page, click the **+Assign** or **Replace** link to assign or replace someone as an Org Member.

Search & Select

2. Select the appropriate **Agency Directory** from the drop-down list, type the new Org Member's e-mail address and then click **Search**.

3. In the search results list, select the individual whom you wish to add by clicking the **plus (+) sign** beside their name.