Adding PD Profiles (Org Units) to a Position/User

Org units are recognized by the system through the use of PD Profiles. A PD Profile can be made up of one or multiple org units. Since some org units are included in 2 or more PD Profiles, it’s important to choose the correct PD Profile when changing a user’s access. To add org unit access to a user, first do a search to see if the org unit is included in more than one PD Profile. On the edit row on the org unit tab click on the drop down for the row:

You will then get a pop-up window for a search. Click on ‘Show Search Criteria’:

Note: If you click ‘Enter’ while there are still 0000000 in the Org Unit field or check the assigned box before you put in an existing Org Unit, the workflow will not process correctly.
The search criteria will be shown at the top of the next pop-up window. Enter the org unit you wish to search for (in this example, 50000847) and click ‘Start Search’:

As you can see, there are 2 PD Profiles the org unit is included in: Z:00846 and Z:00847. Since, for this example, you only want to add org unit 50000847, highlight that row on in the search window and click on ‘OK’.
This will bring the org units in the PD Profile into the window of the Summary Security View for that user:

At this point, make sure you click the ‘Enter’ button so the PD Profile is added to the list. As you can see below, this PD Profile includes 2 org units, 50000847 and 50001151. If this is the PD Profile you want to add, click the assigned box to the left of the org unit. Now the org unit is on the list.