

Introduction

Use this procedure to complete the *Organizational Unit Request Form*.

Process

This task is a part of the Organizational Management process.

Trigger

Perform this procedure whenever you need to request a new organizational unit.

Prerequisites

- Access to the Portal (Ensure pop-ups are allowed for this site)
- Understanding of the purpose of an organizational unit
- Understanding of the Enterprise Structure: Personnel Area and Personnel Sub-Area
- Understanding the inheritance principle and relationships
- Have the proper security roles
- Ability to review Organizational Units you are authorized to maintain
- Basic understanding of how to use Microsoft Office Excel

Menu Path

Use the following menu path to begin this transaction:

- **Manager Self-Service → Organization → Organizational Unit Request Form**

Transaction Code

None

Tips and Tricks

- At times you may need to use your scroll bar to view additional information.
- When downloading the *Organizational Unit Request Form* from the portal, you will be asked to save an Excel file. If you receive any other file type (for example, zip), contact your system administrator to notify them of the error and contact HR Organization Management for the form.
- The form may be updated at any time. Download the form for a request or set of requests, but do not store a copy of the form and re-use it weeks later for another request.
- Do keep a copy of the request until you have confirmed that the changes requested are reflected in the portal.
- Remember to send the request to the individual responsible for processing the form.

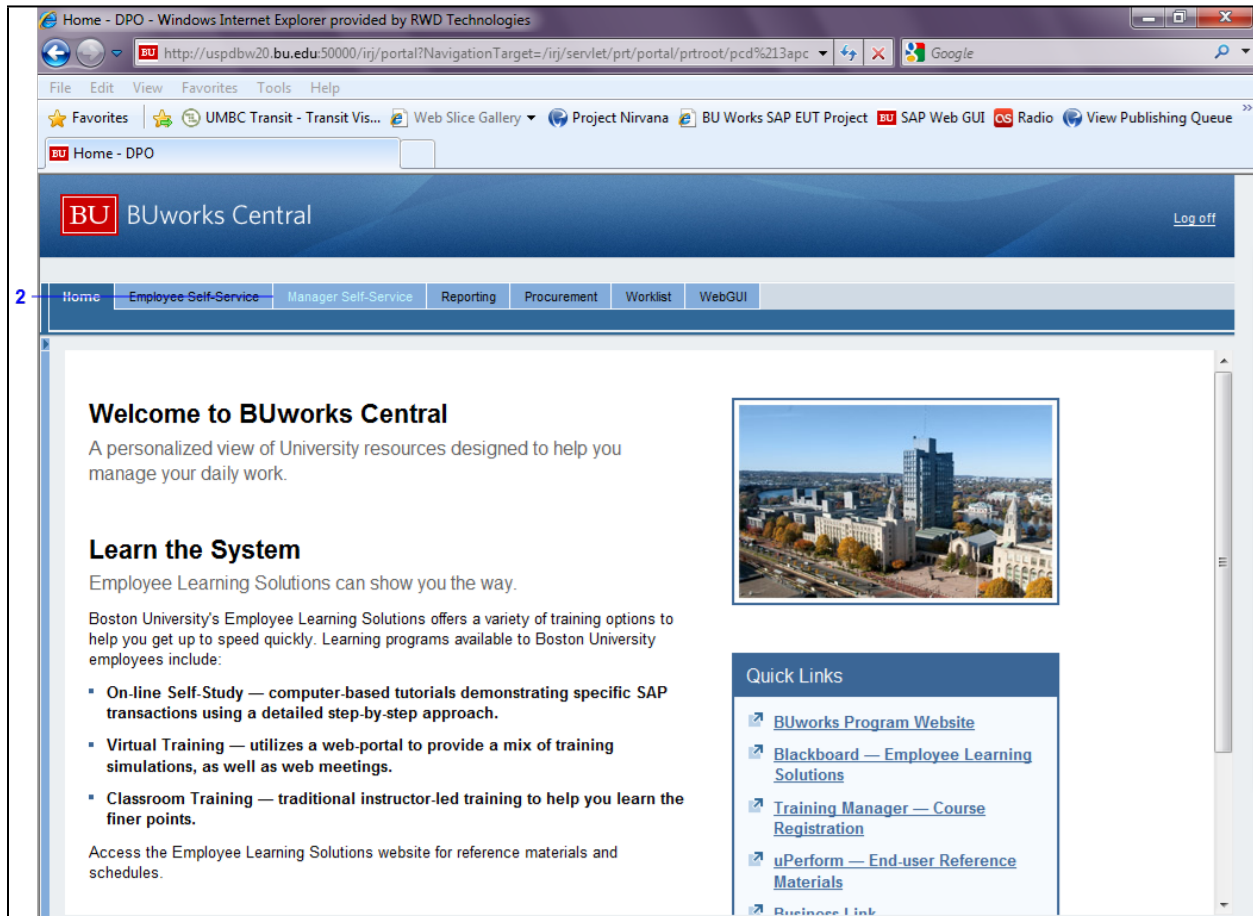
Reports

None

Procedure

1. Start the transaction using the appropriate form name, portal, or transaction code.

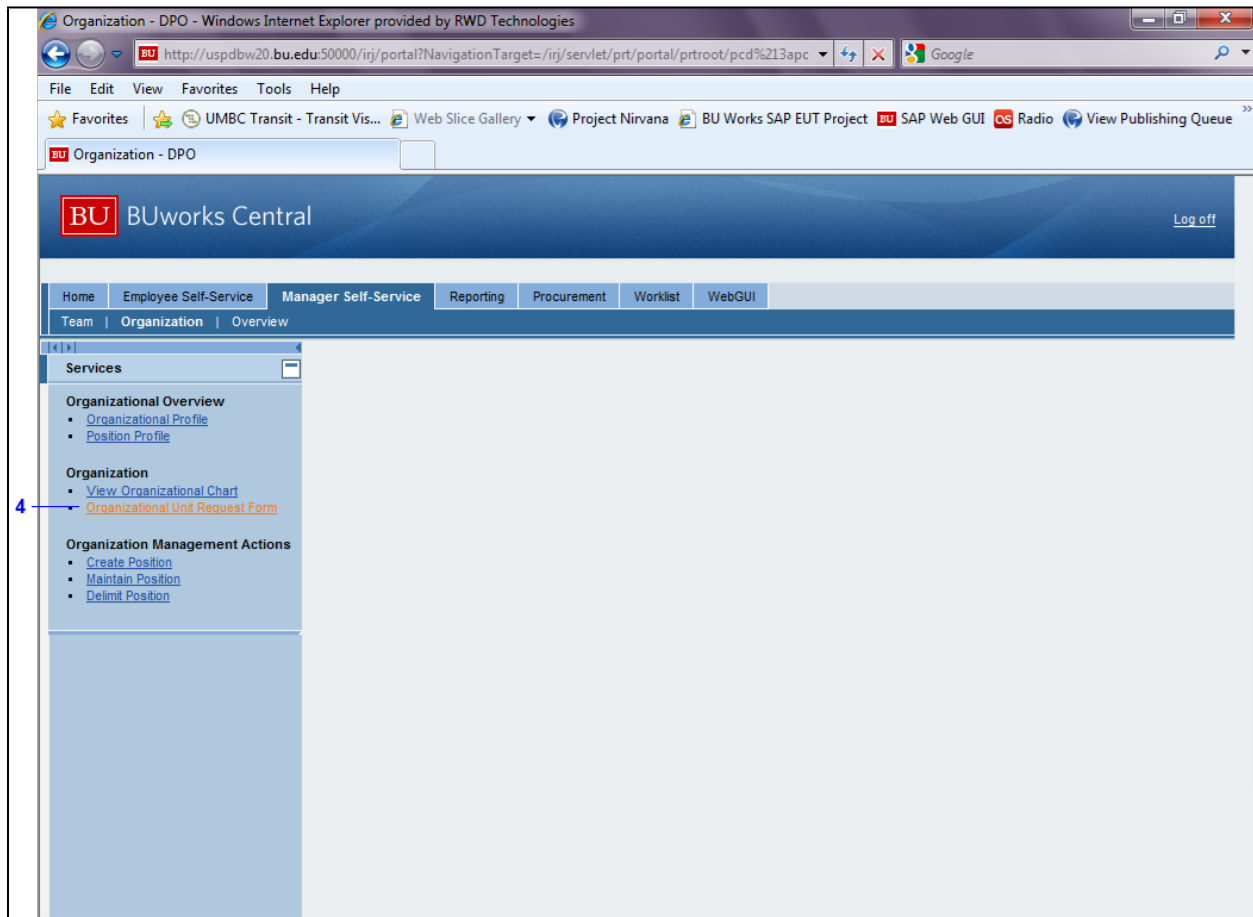
BUworks Central



2. Click the **Manager Self-Service** tab Manager Self-Service.

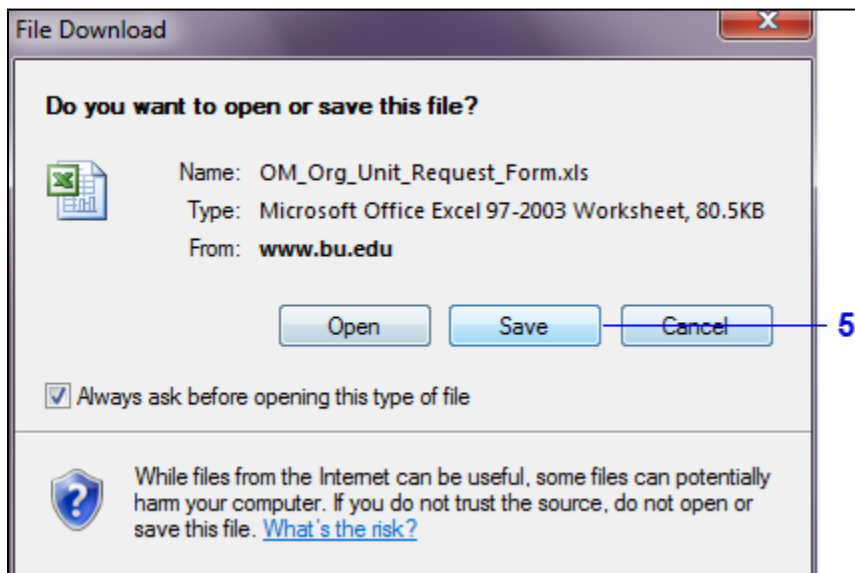
3. Click the **Organization** tab

Organization



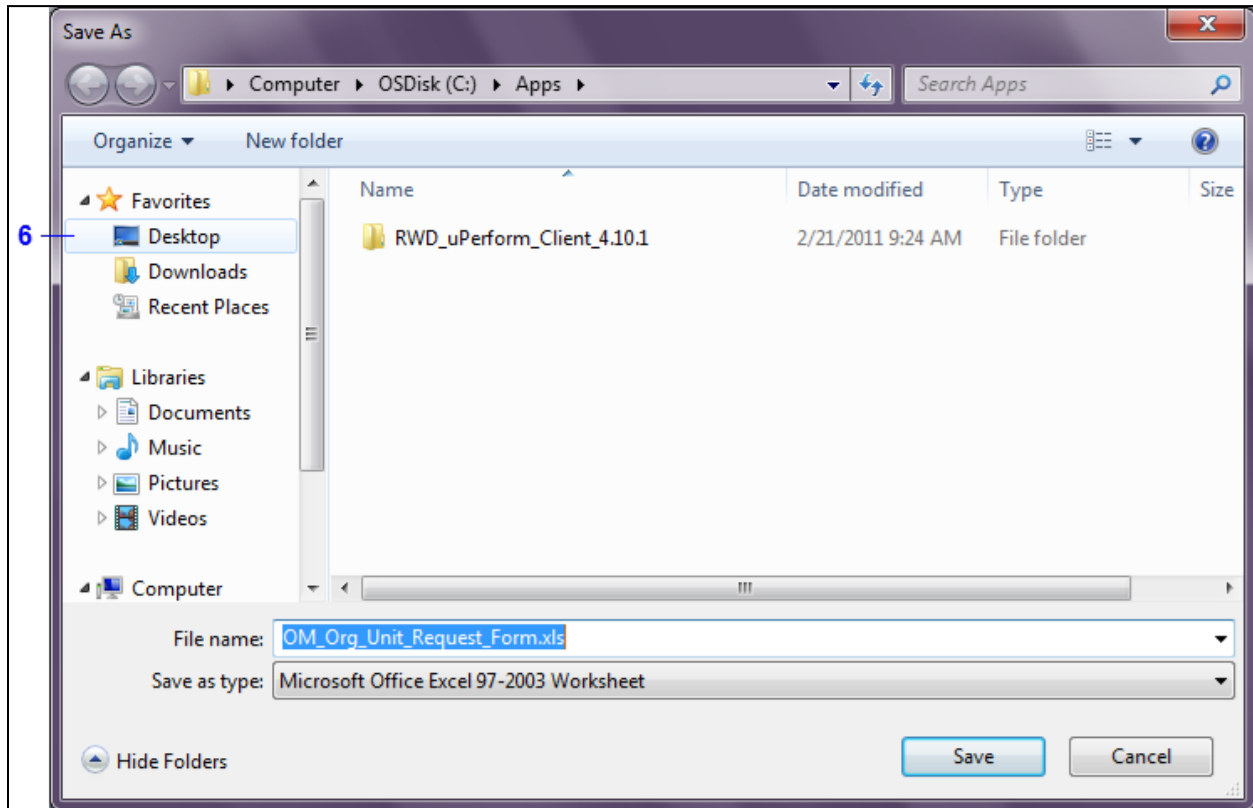
4. Click the **Organizational Unit Request Form** link to open and save the form.

File Download



5. Click the **Save** button  to save the document to your computer.

Save As

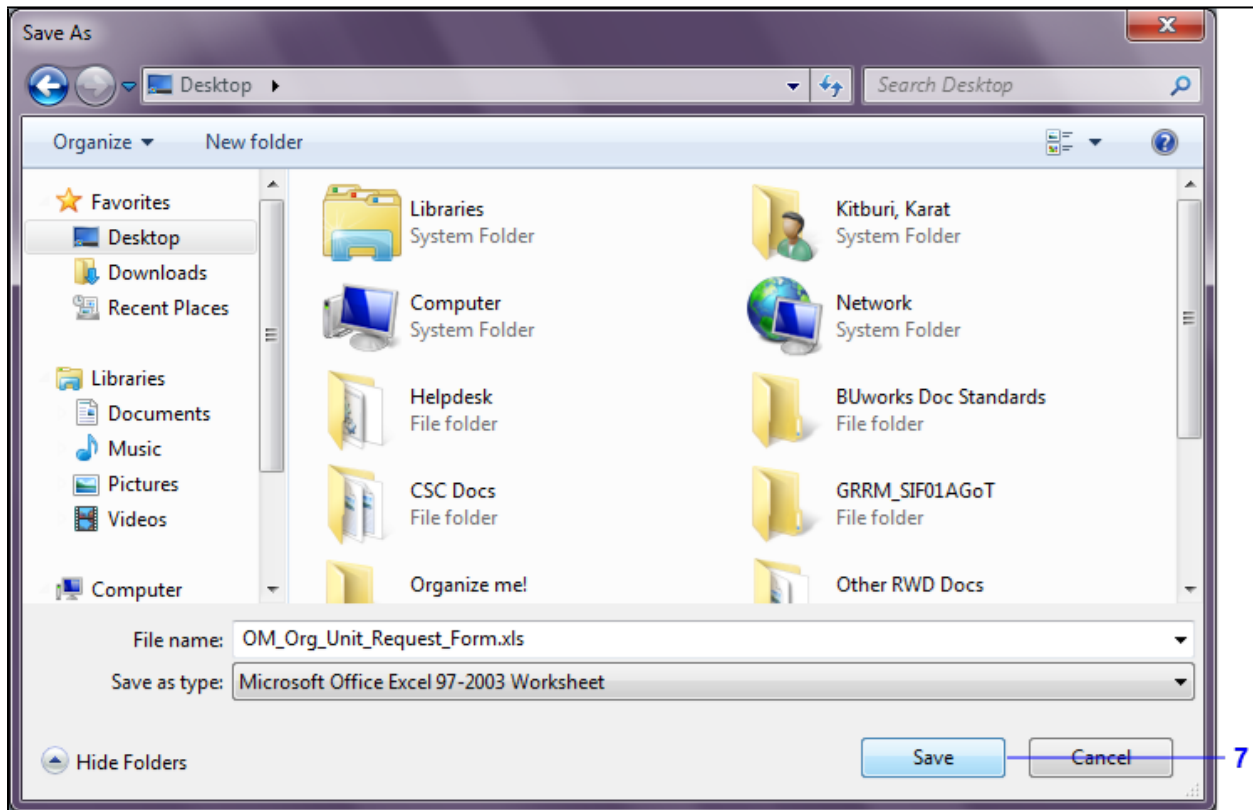


6. Click **Desktop** to select your desktop as the save location.



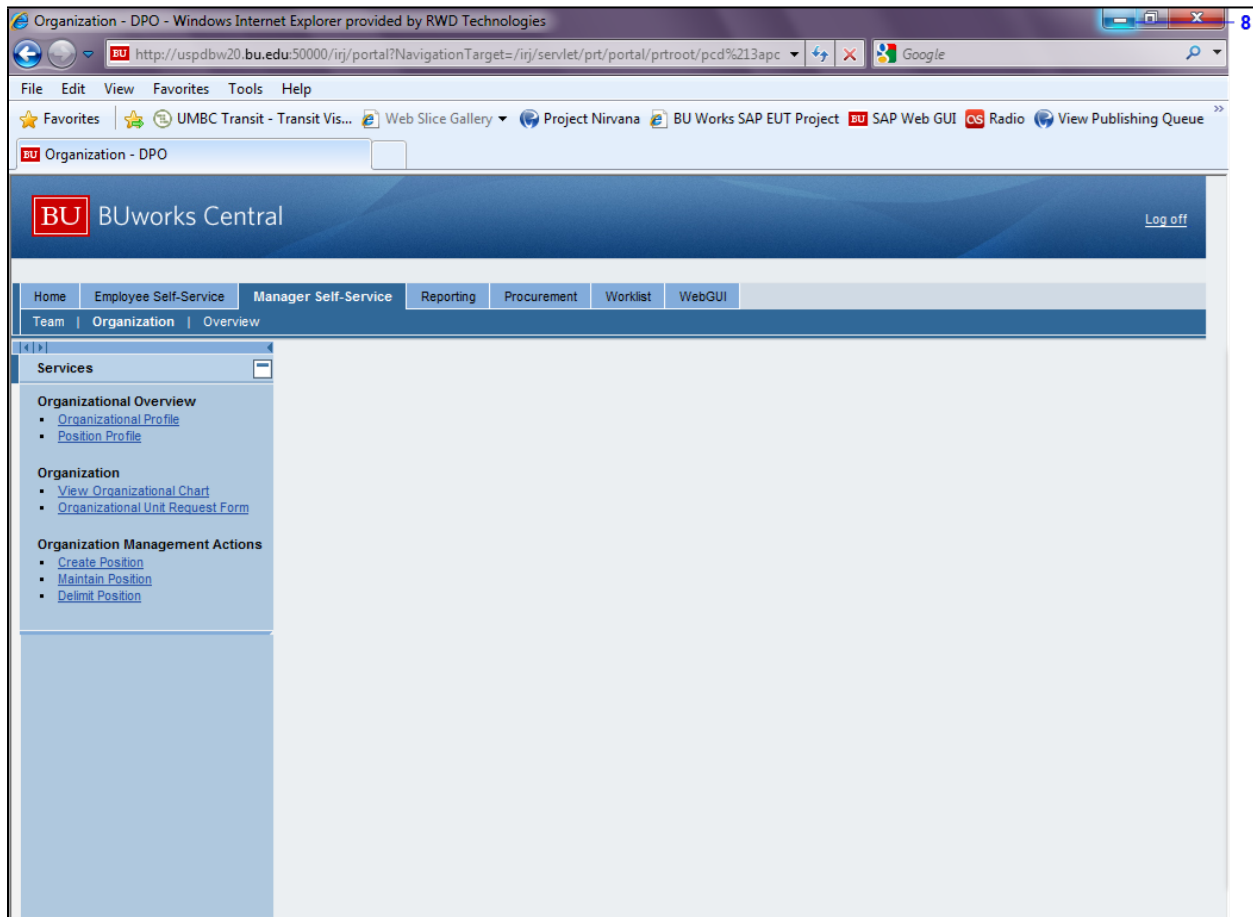
You have the option to save the form in a preferred location.

Save As



7. Click the **Save** button  to save the form to your desktop.

Organization



8. Click the **Minimize** button  to minimize the web browser and view your desktop.

Desktop



9. Double-click the **OM_Org_Unit_Request_Form.xls** file  to open the form document in the **Excel** application.

Microsoft Excel

OM_Org_Unit_Request_Form.xls [Compatibility Mode] - Microsoft Excel

Home Insert Page Layout Formulas Data Review View

Clipboard Font Alignment Number Styles Cells Editing

F9

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24

A B C D E F G H I J K L M N

BOSTON UNIVERSITY **Organizational Unit Request Form**

Select Action: ☐ Create/New ☐ Modify ☐ Delimit ☐ Delete

Section **Please read instructions before proceeding.**

A Date of Request:
 Requestor Name:
 Requestor Phone Number:

B Effective Start and End Date:
 Organizational Unit ID:
 Organizational Unit Abbreviation:
 Organizational Unit Name:
 (Name requested is the complete name with no abbreviations, all punctuation. All name(s) will be reviewed by Marketing/Branding)

C Reports To (Parent ID/Name): /
 Personnel Area: (drop-down)
 Personnel Sub-Area: (drop-down)
 Cost Center Assignment:
 General Description (Blurb):

Ready RequestForm For Office Use 100%

10. Drag the **vertical scroll bar** down to **row 42** to view the instructions for completing the form.

Microsoft Excel

OM_Org_Unit_Request_Form.xls [Compatibility Mode] - Microsoft Excel

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1 2 3 4 5 6 7 Section

BOSTON UNIVERSITY **Organizational Unit Request Form**

Select Action: ☒ Create/New ☐ Modify ☐ Delimit ☐ Delete

Please read instructions before proceeding.

11 42 **INSTRUCTION:**

For all requests, please fill out section A. If there are any changes to the information provided, the person listed in this section will be contacted.

Data provided in Section B and C will be used to process the request. If you are requesting a new organizational unit, the end date will default to 12/31/9999 if no date is provided.

Effective Start Date Date the organization will start. Please enter a valid date in the format mm/dd/yyyy.

Organizational Unit Abbreviation If the organization will be known by an acronym or referenced by some short name, for example, the course catalog - enter the abbreviation here.

Organizational Unit Name Full long name of the unit, no abbreviations, all punctuations.

Reports To (Parent ID/Name) Provide at minimum, the the organizational unit 8 digit ID the new organizational unit will report to.

Personnel Area Select the personnel area from the drop-down. If the value you are looking for is missing, note the personnel area in the comment section.

Personnel Sub-Area Select the personnel sub-area from the drop-down. If the value you are looking for is missing, note the personnel area in the comment section.

Cost Center Assignment Master cost center for the new organizational unit. This assignment will be cross-

RequestForm For Office Use

11. Click in the **Instruction** title in **row 42** to review the instructions for completing the form.

Microsoft Excel

OM_Org_Unit_Request_Form.xls [Compatibility Mode] - Microsoft Excel

Home Insert Page Layout Formulas Data Review View

Clipboard Font Alignment Number Styles Cells Editing

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1 2 3 4 5 6 7 Section

BOSTON UNIVERSITY **Organizational Unit Request Form**

12 Select Action: ☒ Create/New ☐ Modify ☐ Delimit ☐ Delete

Please read instructions before proceeding.

41

42 **INSTRUCTION:**

43 For all requests, please fill out section A. If there are no requests, the person listed in this section

44 will be contacted

45 Data provided in Section B and C will be used to process the request. Please enter a valid date in the format mm/dd/yyyy

46 If you are requesting a new organizational unit, the end date will default to the best of your knowledge.

47 **Effective Start Date** Date the organization was created. If no date is provided, the end date will default to 12/31/9999 if no date is provided.

48

49 **Organizational Unit Abbreviation** If the organization will be known by an acronym or referenced by some short name, for example, the course catalog - enter the abbreviation here

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51 **Organizational Unit Name** Full long name of the unit, no abbreviations, all punctuation

52 **Reports To (Parent ID/Name)** Provide at minimum, the the organizational unit 8 digit ID the new organizational unit will report to

53

54 **Personnel Area** Select the personnel area from the drop-down. If the value you are looking for is missing, note the personnel area in the comment section

55

56 **Personnel Sub-Area** Select the personnel sub-area from the drop-down. If the value you are looking for is missing, note the personnel area in the comment section

57

58 **Cost Center Assignment** Master cost center for the new organizational unit. This assignment will be cross-

RequestForm For Office Use

Ready

12. Select the **Create/New** radio button within **row 5** to indicate that you are requesting the creation of a new organizational unit.

Microsoft Excel

The screenshot shows the 'Organizational Unit Request Form' in Microsoft Excel. The form is titled 'Organizational Unit Request Form' and includes a 'Select Action' section with radio buttons for 'Create/New', 'Modify', 'Delimit', and 'Delete'. Below this is a 'Section' header with the instruction 'Please read instructions before proceeding.' The form fields are organized into three main sections: A (Date of Request, Requestor Name, Requestor Phone Number), B (Effective Start and End Date, Organizational Unit ID, Organizational Unit Abbreviation, Organizational Unit Name), and C (Reports To (Parent ID/Name), Personnel Area, Personnel Sub-Area, Cost Center Assignment, General Description (Blurb)). Each field has a corresponding input box or dropdown menu.

13. As required, complete/review the following fields:

Field	R/O/C	Description
Date of Request	Required	The date the request is made. Example: 6/10/2011
Requestor Name	Required	The first and last name of the individual making the request. Example: Enter contact's first and last name
Requestor Phone Number	Required	The phone number of the individual making the request. Example: Enter contact's phone number



Field	R/O/C	Description
Effective Start Date and End Date	Required	The effective starting and ending dates for the Organizational Unit. Example: 7/01/2011
Effective Start Date and End Date	Required	The effective starting and ending dates for the Organizational Unit. Example: 12/31/2014
Organizational Unit Abbreviation	Required	The abbreviated name of the Organizational Unit. Example: SPH TOU
Organizational Unit Name	Required	Name of organizational unit. Example: School of Public Health: Training Organizational Unit
Reports To (Parent ID / Name)	Required	The ID and name of the Parent Organizational Unit to which the new Organizational Unit will report. Example: 10009999

Microsoft Excel

OM_Org_Unit_Request_Form.xls [Compatibility Mode] - Microsoft Excel

Home Insert Page Layout Formulas Data Review View

Clipboard Font Alignment Number Styles Cells Editing

F19 10009999

BOSTON UNIVERSITY **Organizational Unit Request Form**

Select Action: ☒ Create/New ☐ Modify ☐ Delimit ☐ Delete

Section **Please read instructions before proceeding.**

A Date of Request: 6/10/2011
Requestor Name: Enter contact's first and last name
Requestor Phone Number: Enter contact's phone number

B Effective Start and End Date: 7/1/2011 - 12/31/2014
Organizational Unit ID: (8 digit ID)
Organizational Unit Abbreviation: SPH TOU (max 9 characters, including spaces)
Organizational Unit Name: School of Public Health: Training Organizational Unit
(Name requested is the complete name with no abbreviations, all punctuation. All name(s) will be reviewed by Marketing/Branding)

C Reports To (Parent ID/Name): 10009999 /
Personnel Area: (drop-down)
Personnel Sub-Area: (drop-down)
Cost Center Assignment:
General Description (Blurb):

RequestForm For Office Use

Enter

14

14. Click in the second **Reports To (Parent ID/Name)** field.

Microsoft Excel

15. As required, complete/review the following fields:

Field	R/O/C	Description
Reports To (Parent ID / Name)	Required	The ID and name of the Parent Organizational Unit to which the new Organizational Unit will report. Example: Enter Parent Org Unit Description

Microsoft Excel

OM_Org_Unit_Request_Form.xls [Compatibility Mode] - Microsoft Excel

Home Insert Page Layout Formulas Data Review View

Clipboard Font Alignment Number Styles Cells Editing

H19 Enter Parent Org Unit Description

BOSTON UNIVERSITY **Organizational Unit Request Form**

Select Action: ☒ Create/New ☐ Modify ☐ Delimit ☐ Delete

Section **Please read instructions before proceeding.**

A Date of Request: 6/10/2011
Requestor Name: Enter contact's first and last name
Requestor Phone Number: Enter contact's phone number

B Effective Start and End Date: 7/1/2011 - 12/31/2014
Organizational Unit ID: (8 digit ID)
Organizational Unit Abbreviation: SPH TOU (max 9 characters, including spaces)
Organizational Unit Name: School of Public Health: Training Organizational Unit
(Name requested is the complete name with no abbreviations, all punctuation. All name(s) will be reviewed by Marketing Branding)

C Reports To (Parent ID/Name): 10009999 / Enter Parent Org Unit Description

16 Personnel Area: (drop-down)
Personnel Sub-Area: (drop-down)
Cost Center Assignment:
General Description (Blurb):

RequestForm For Office Use

16. Click in the **Personnel Area** field.

Microsoft Excel

17. Click the **Drop-down** arrow  in the **Personnel Area** field.

Microsoft Excel

OM_Org_Unit_Request_Form.xls [Compatibility Mode] - Microsoft Excel

Home Insert Page Layout Formulas Data Review View

Clipboard Font Alignment Number Styles Cells Editing

F20

1 **BOSTON UNIVERSITY** **Organizational Unit Request Form**

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5 Select Action: ☒ Create/New ☐ Modify ☐ Delimit ☐ Delete

6

7 Section **Please read instructions before proceeding.**

8

9 A Date of Request: 6/10/2011

10 Requestor Name: Enter contact's first and last name

11 Requestor Phone Number: Enter contact's phone number

12

13 B Effective Start and End Date: 7/1/2011 - 12/31/2014

14 Organizational Unit ID: (8 digit ID)

15 Organizational Unit Abbreviation: SPH TOU (max 9 characters, including spaces)

16 Organizational Unit Name: School of Public Health Training Organizational Unit

17 (Name requested is the complete name with no abbreviations, all punctuation. All name(s) will be reviewed by Marketing Branding)

18 C Reports To (Parent ID/Name): 10009999 / Enter Parent Org Unit Description

19 Personnel Area: op-down)

20

21 Personnel Sub-Area: Charles River Campus BU Medical Campus NEIDL Boston Medical Ctr Domestic Off-Campus Overseas op-down)

22 Cost Center Assignment:

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24 General Description (Blurb):

RequestForm For Office Use

Ready 100%

18. Select the appropriate value from the list.

Microsoft Excel

OM_Org_Unit_Request_Form.xls [Compatibility Mode] - Microsoft Excel

Home Insert Page Layout Formulas Data Review View

Clipboard Font Alignment Number Styles Cells Editing

F21

1 BOSTON UNIVERSITY Organizational Unit Request Form

2

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5 Select Action: ☒ Create/New ☐ Modify ☐ Delimit ☐ Delete

6

7 Section

17 Please read instructions before proceeding.
(Name requested is the complete name with no abbreviations, all punctuation. All name(s) will be reviewed by Marketing/Branding)

19 C Reports To (Parent ID/Name): 10009999 / Enter Parent Org Unit Description

20 Personnel Area: BU Medical Campus (drop-down)

21 Personnel Sub-Area: (drop-down)

22 Cost Center Assignment:

24 General Description (Blurb):

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32 D Reason for Action:

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RequestForm For Office Use

Ready

19. Click the **Drop-down** arrow  in the **Personnel Sub-Area** field.

Microsoft Excel

OM_Org_Unit_Request_Form.xls [Compatibility Mode] - Microsoft Excel

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F21

1 **BOSTON UNIVERSITY**

2 **Organizational Unit Request Form**

3

4

5 Select Action: ☒ Create/New ☐ Modify ☐ Delimit ☐ Delete

6

7 **Section**

17 Please read instructions before proceeding.

17 (Name requested is the complete name with no abbreviations, all punctuation. All name(s) will be reviewed by Marketing/Branding)

19 C Reports To (Parent ID/Name): 10009999 / Enter Parent Org Unit Description

20 Personnel Area: BU Medical Campus (drop-down)

21 Personnel Sub-Area: (drop-down)

22 Cost Center Assignment: NREP Faculty

22 NREP Staff

22 NREP Student

22 BU Police

22 L2324 (Cler/Tech)

22 L494 (Security Officer)

22 L615 (Svc Maint)

22 L888 (Librarians)

24 General Description (Blurb):

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32 D Reason for Action:

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RequestForm For Office Use

Ready

20. Select the appropriate value from the list.

Microsoft Excel

21. As required, complete/review the following fields:


Field	R/O/C	Description
Cost Center Assignment	Required	The ID number of the Cost Center associated with the Organizational Unit. Example: 2409990000
General Description (Blurb)	Required	A further description of the Organizational Unit. Example: Describe the purpose of this organizational unit.

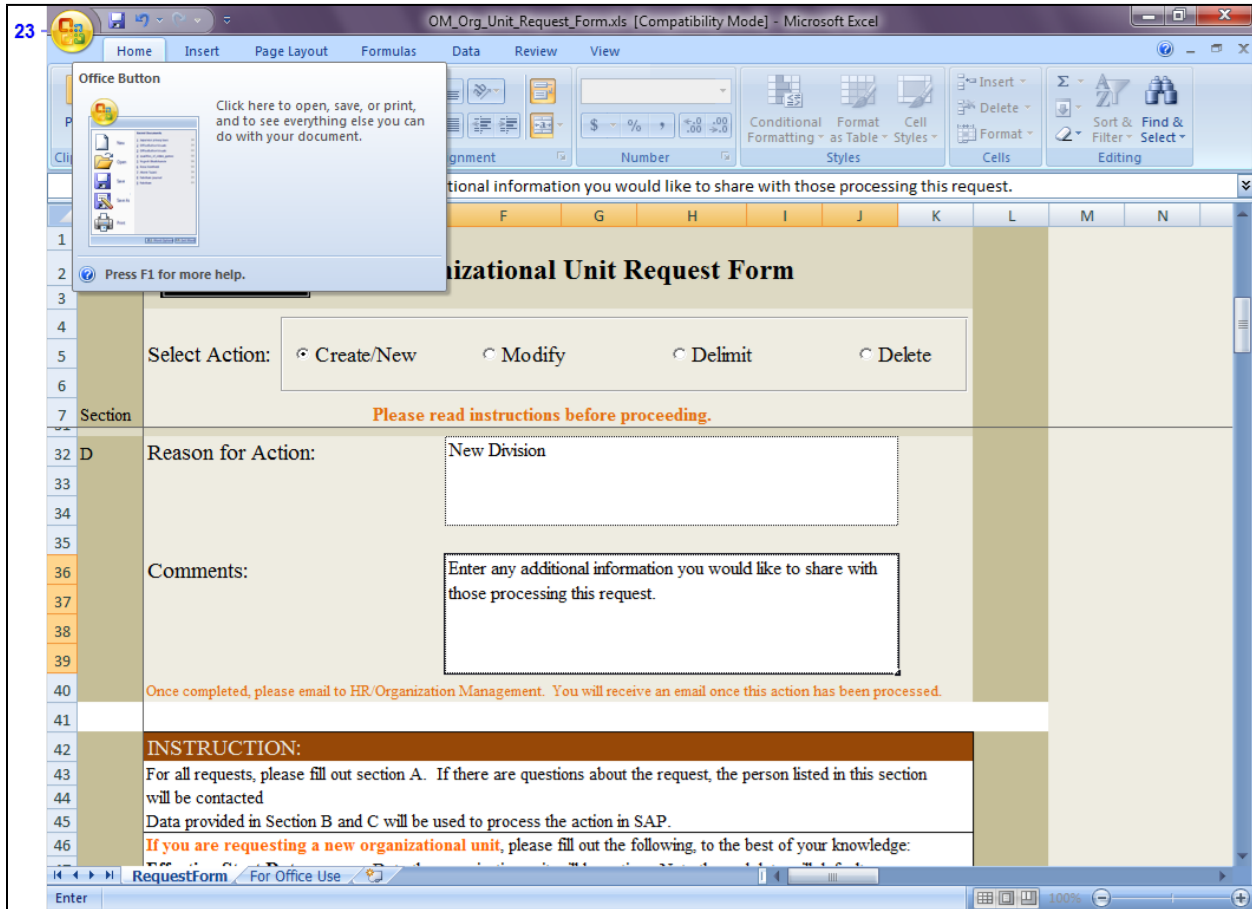
22. As required, complete/review the following fields:

Field	R/O/C	Description
Reason for Action	Required	The reason the action is being run such as rehire, absence or salary change. Example: New Division

Field	R/O/C	Description
Comments	Required	Explanation or more information related to the transaction. Example: Enter any additional information you would like to share with those processing this request.

Microsoft Excel

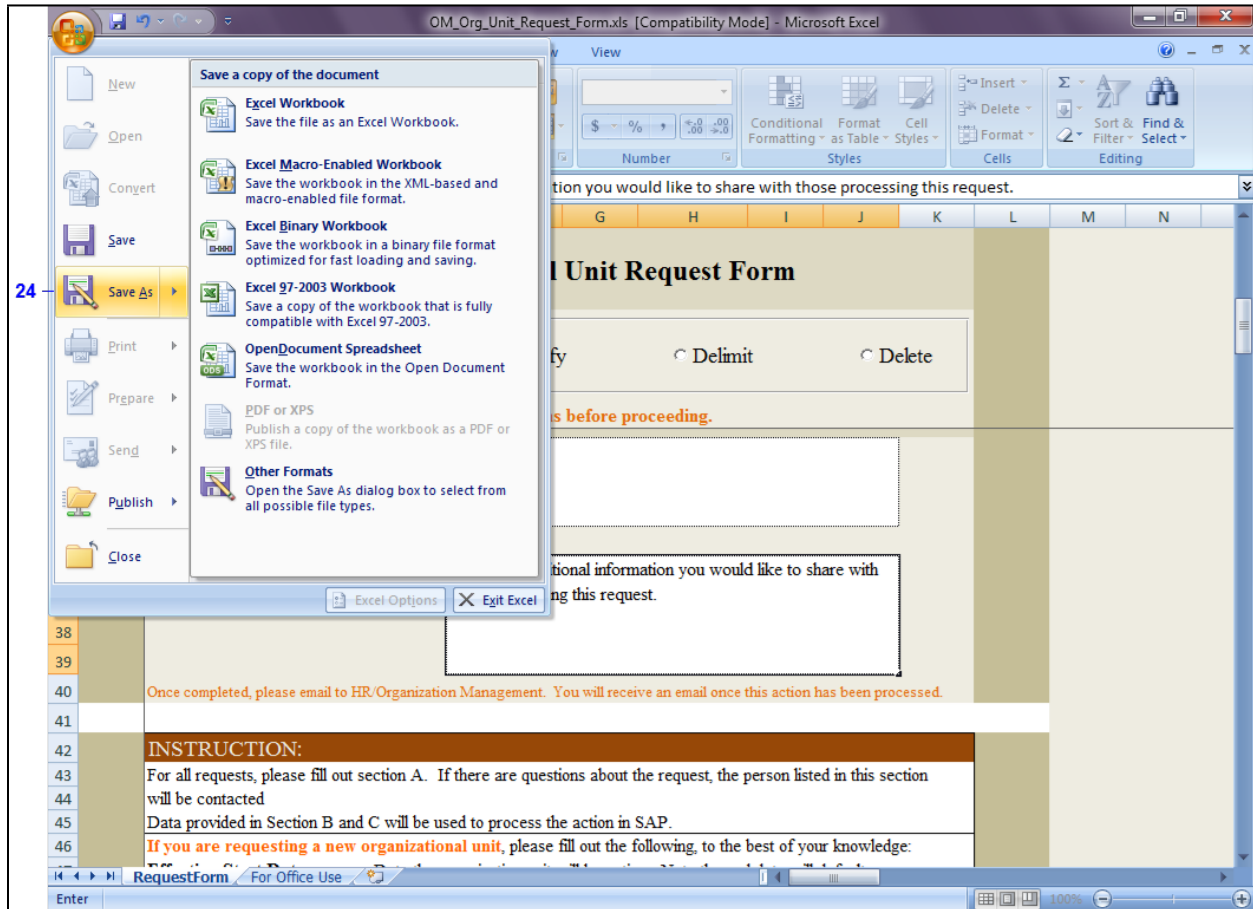
23.  Click the Office button to view the Office menu.



The screenshot shows the Microsoft Excel interface with the 'OM_Org_Unit_Request_Form.xls' file open. The Office Button is highlighted, and the Office menu is open, showing options like Open, Save, Print, and Send To. The spreadsheet content includes a title 'Organizational Unit Request Form', a 'Select Action' section with radio buttons for 'Create/New', 'Modify', 'Delimit', and 'Delete', and a 'Reason for Action' section with a text box containing 'New Division'. A 'Comments' section is also visible with a text box containing 'Enter any additional information you would like to share with those processing this request.'

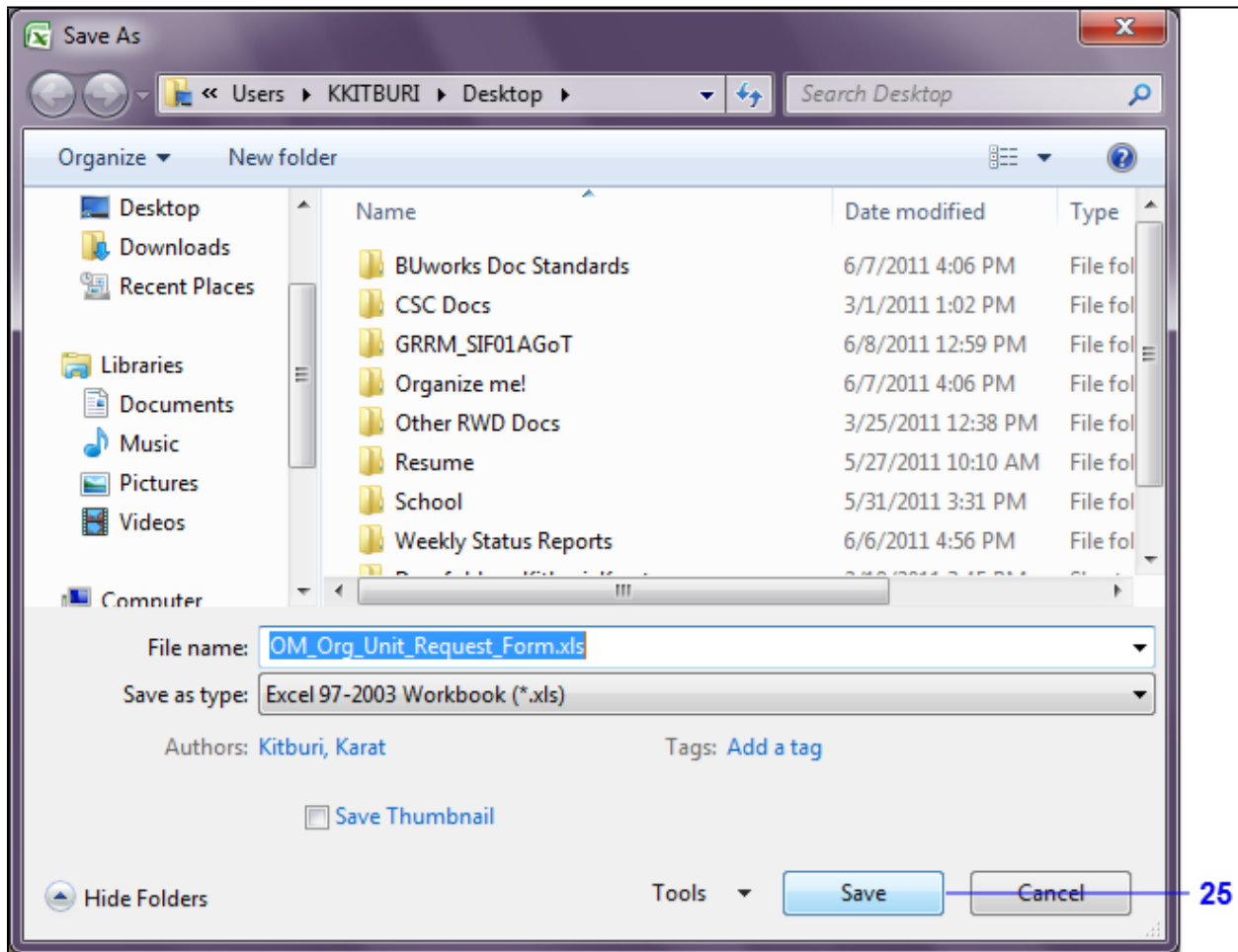
23.  Click the **Office** button to view the Office menu.


Microsoft Excel



24. Select the **Save As** option  to save the completed form.

Save As

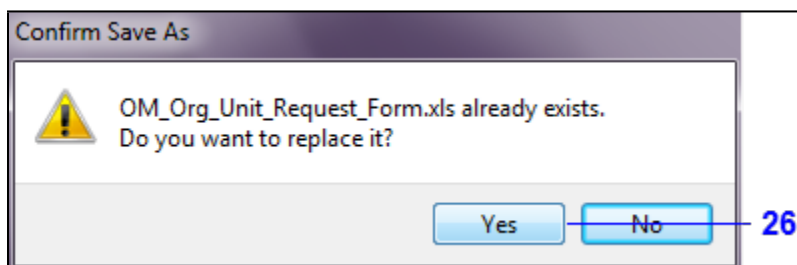


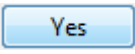
25. Click the **Save** button  to save the completed form in the desired location.



You may want to rename the file to something specific to the request.

Confirm Save As

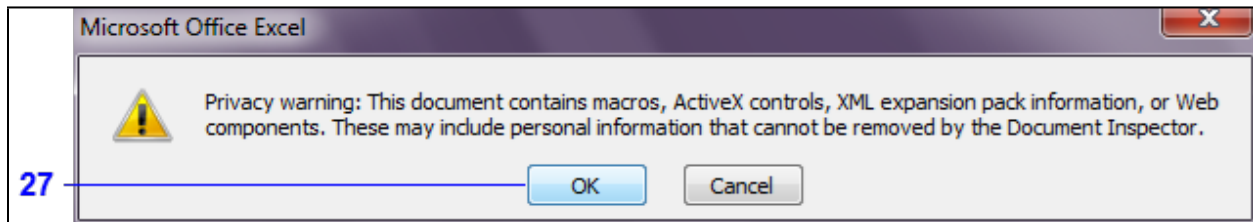


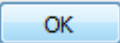
26. Click the **Yes** button  to replace the original form with the filled in request form.



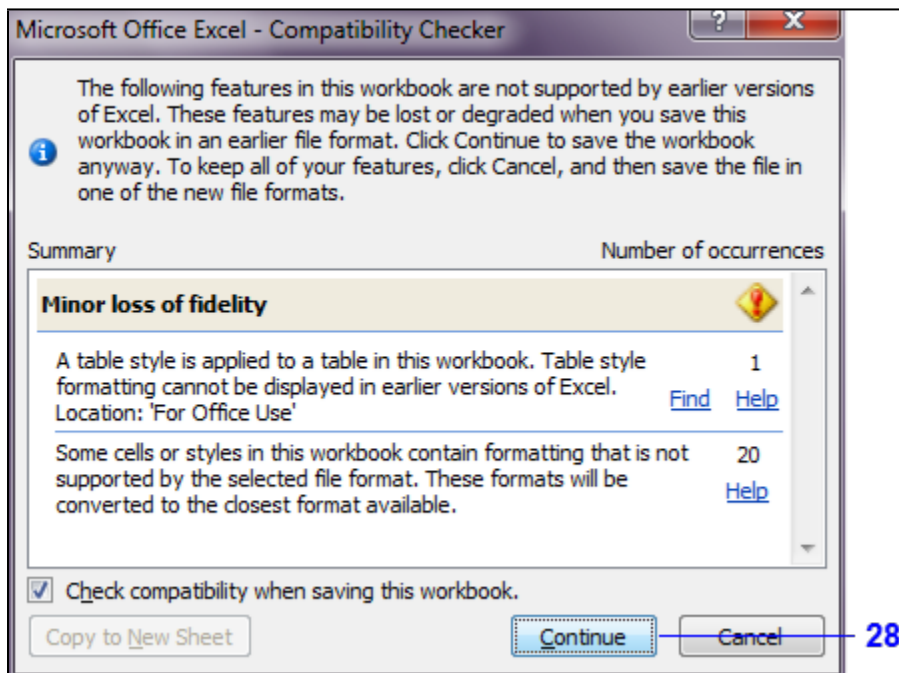
You may not receive the following warning messages. This is dependent upon your computer's current settings.

Microsoft Office Excel



27. Click the **OK** button  to accept the privacy warning.

Microsoft Office Excel - Compatibility Checker



28. Click the **Continue** button  to save the file with compatibility changes.

Microsoft Excel

OM_Org_Unit_Request_Form.xls [Compatibility Mode] - Microsoft Excel

Home Insert Page Layout Formulas Data Review View

Clipboard Font Alignment Number Conditional Formatting Styles Cell Styles Insert Delete Format Sort & Find & Filter Select Editing

A1 Based on the Action, mark column A with results of the checklist item. Do not alter data on original request

	A	B	C	D	E	F	G	H	I
1	Based on the Action, mark column A with results of the checklist item. Do not alter data on original request								
2	If Create:								
3			Cost Center validated by Budget						
4			Object Name(s) validated by Marketing						
5			Notify Recruitment with Org ID and Name						
6			Final Object Abbreviation						
7			Final Object Long Name						
8			Final Object Full Name						
9		Review of parent org							
10			inheriting Personnel Area						
11			inheriting Personnel Subarea						
12			inheriting Cost Center						
13			Any potential issue with the Parent Organizational Unit						
14			if not inheriting, personnel area/personnel sub-area combination OK						
15			Necessary approvals obtained (Refer to approval section below)						
16	If Modification:								
17			Organizational Unit ID validated						
18			Change to Cost Center validated by Budget						
19			Change to Object Name(s) validated by Marketing						
20			Change to Object Name(s) - Notification sent to Recruitment						
21			Final Object Abbreviation						
22			Final Object Long Name						
23			Final Object Full Name						

RequestForm For Office Use

29. Click the **For Office Use** tab **For Office Use** at the bottom of the screen to view the processing checklist for the form.

Organizational Unit Request Form

OM_Org_Unit_Request_Form.xls [Compatibility Mode] - Microsoft Excel

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F36 Enter any additional information you would like to share with those processing this request.

BOSTON UNIVERSITY

Organizational Unit Request Form

Select Action: ☒ Create/New ☐ Modify ☐ Delimit ☐ Delete

Section

Please read instructions before proceeding.

If you would like to delete an organizational unit, please provide the following:

Organizational Unit ID

Organizational Unit Name

Reason for Action

You are welcome to enter any additional information in the comments field (section D)

Once you have completed the request form, please email the form to HR/Organization Management and cc any managers in your department as appropriate.

HR/Organization Management will review the information and obtain any additional authorizations

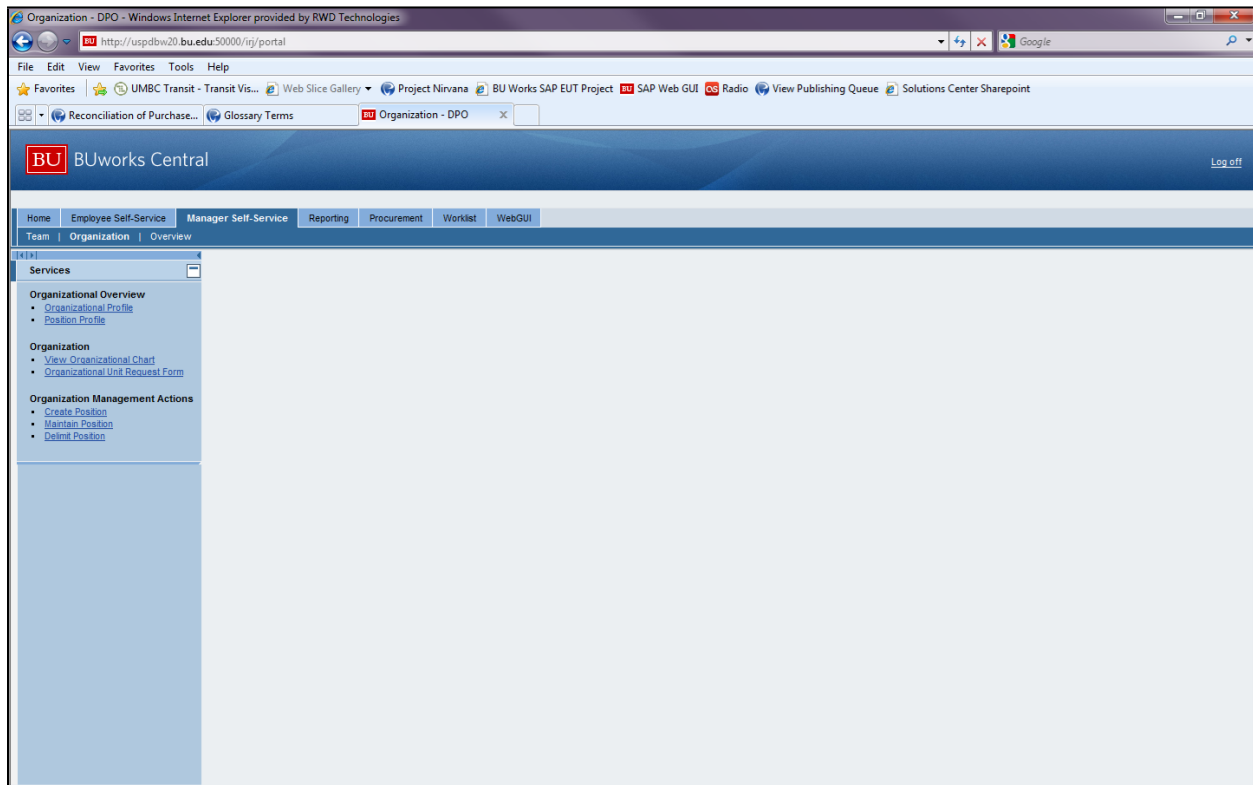
Once your request has been processed, you will receive an email from HR/Org Management

If you have any questions, please do not h...

Organization - DPO - Windows I...

30. Click the **Organization - XXX - Windows Internet Explorer** button  on your taskbar to return to the *BUworks Central* screen.

Manager Self-Service



31. The transaction is complete.

Results and Next Steps

You have completed and submitted the *Organizational Unit Request Form*, as well as ensured it has been processed. Once you have completed the form, it should be submitted to the designated email address that is shown in the **Form Instruction Section** (approximately row 81). Any follow-up questions will be directed to the contact person listed on the form. After the request has been processed, the sender of the form and the contact person will be notified by email. Please confirm the changes are as expected in the Portal. If there are any errors, send a message about the error to the designated email address.