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.
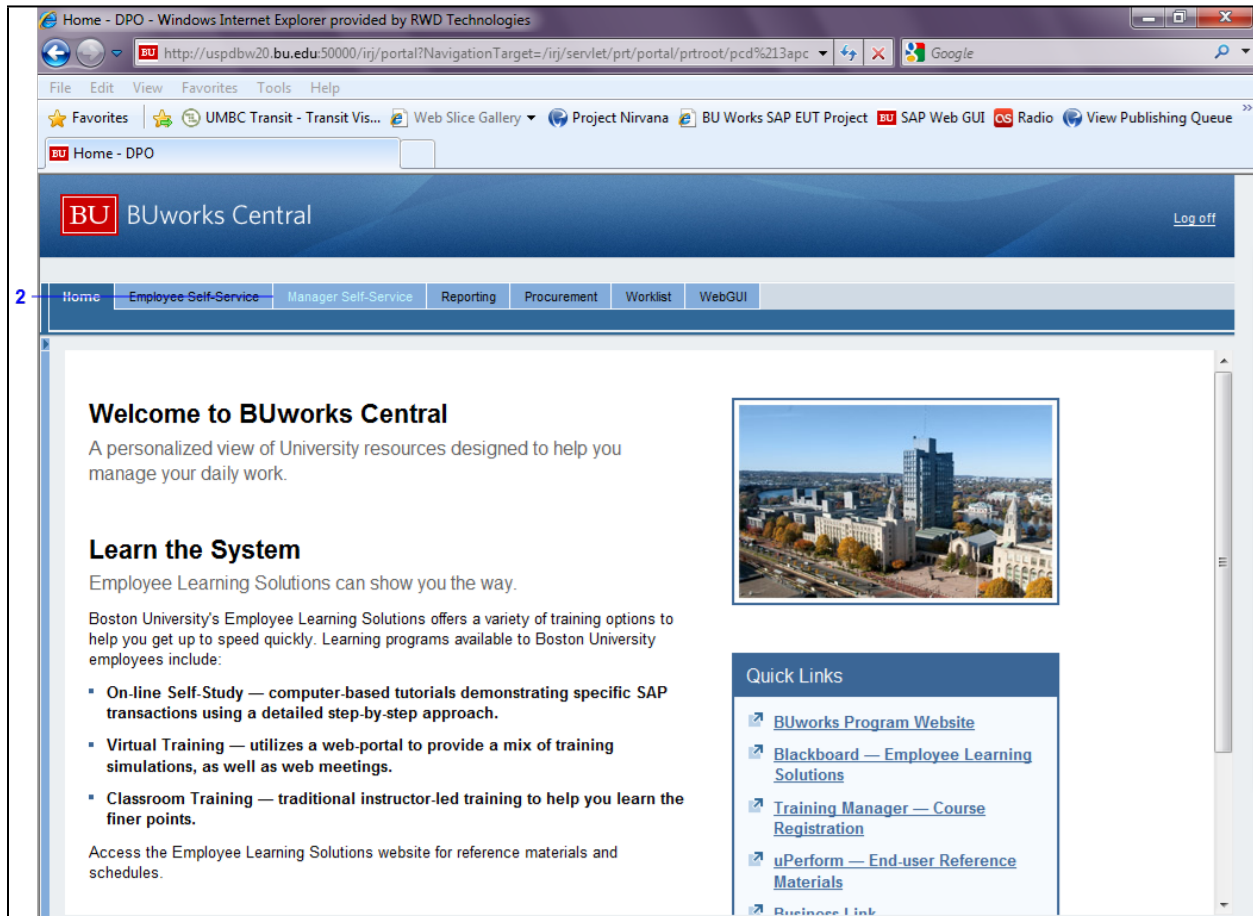- Remember to send the request to the individual responsible for processing the form.

Reports

None

Procedure

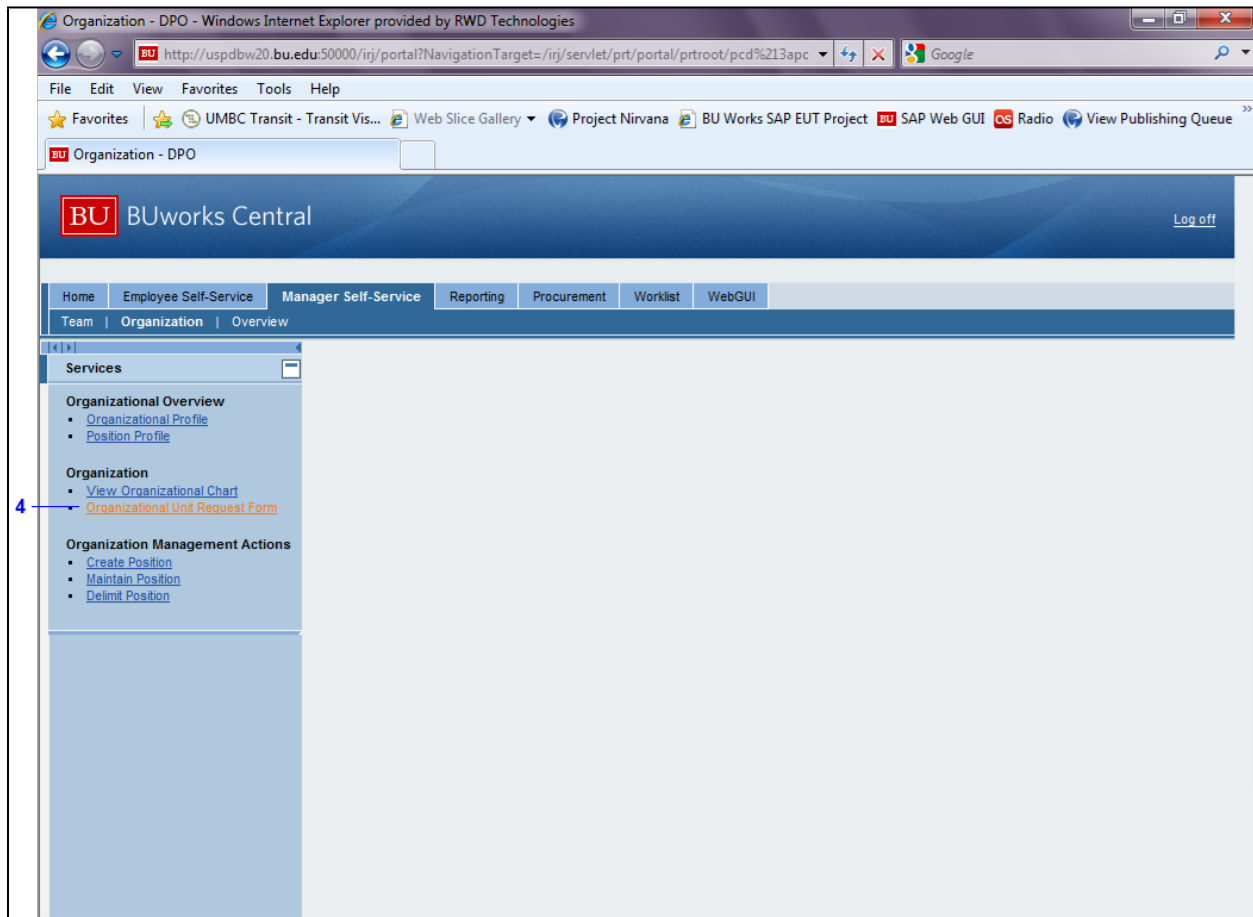**1.** Start the transaction using the appropriate form name, portal, or transaction code.

BUworks Central

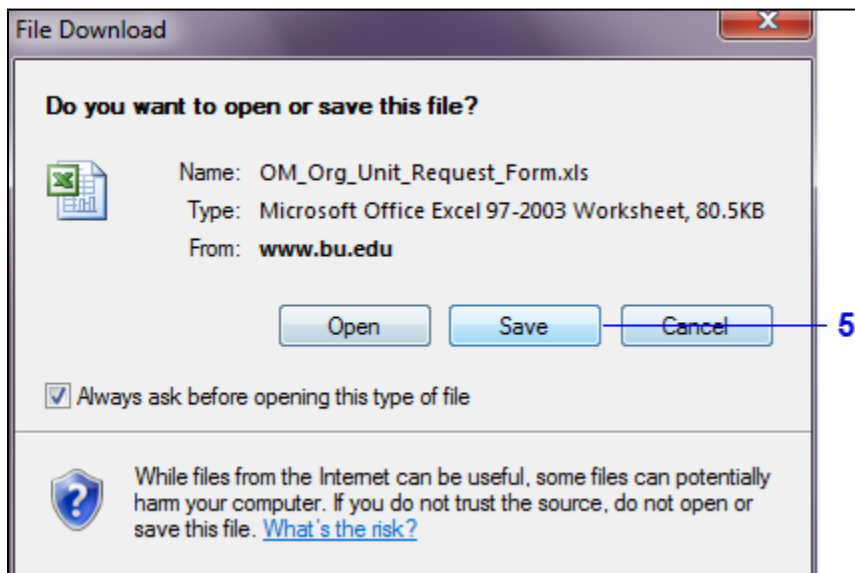**2.** Click the **Manager Self-Service** tab Manager Self-Service .

Manager Self-Service

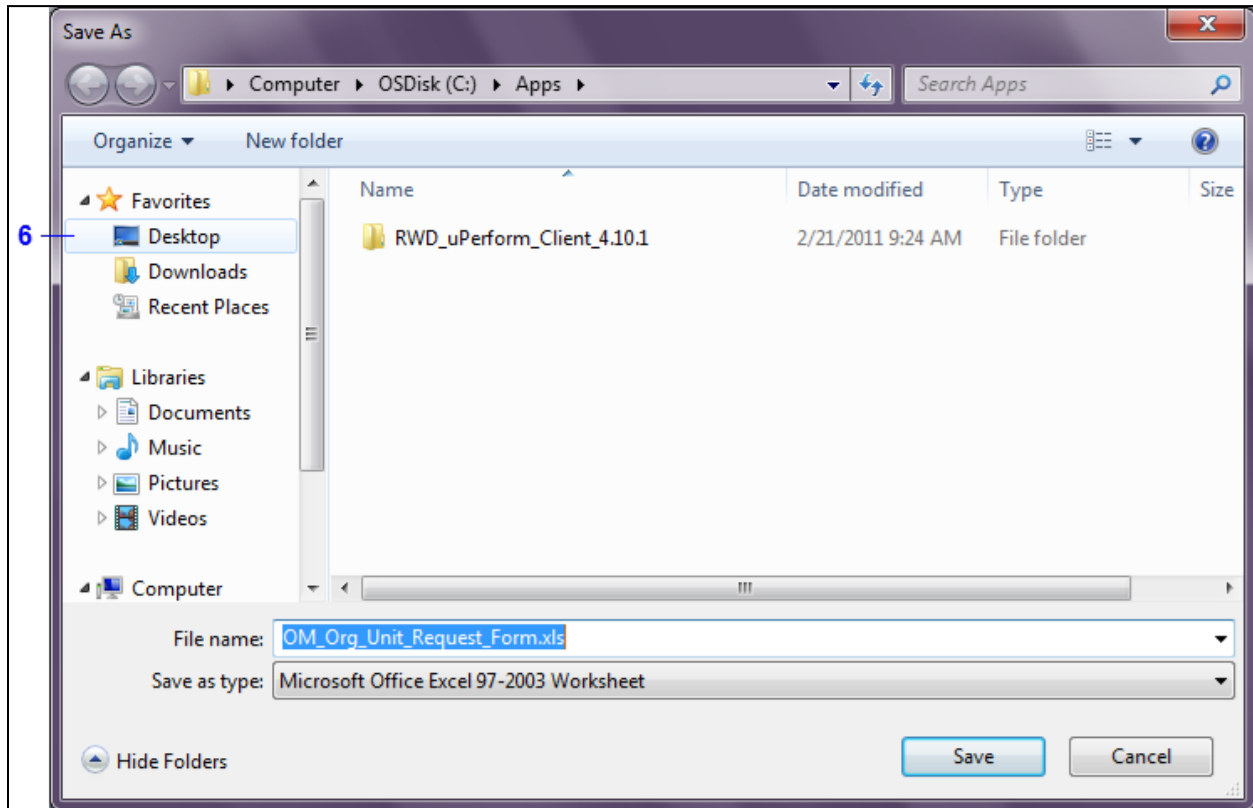**3.**   Click the **Organization** tab [Organization].

Organization

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

File Download

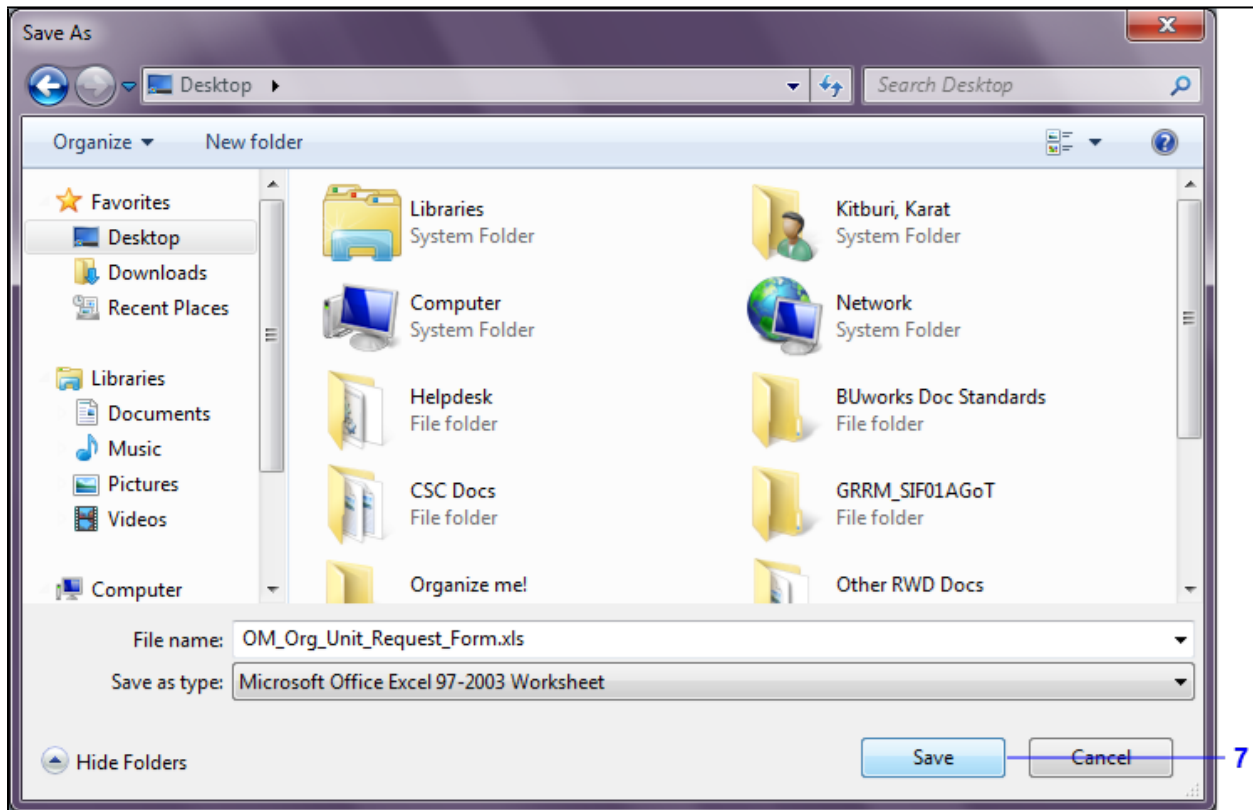**5.** Click the **Save** button [Save] to save the document to your computer.

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 [Save] to save the form to your desktop.

BUworks Online Help

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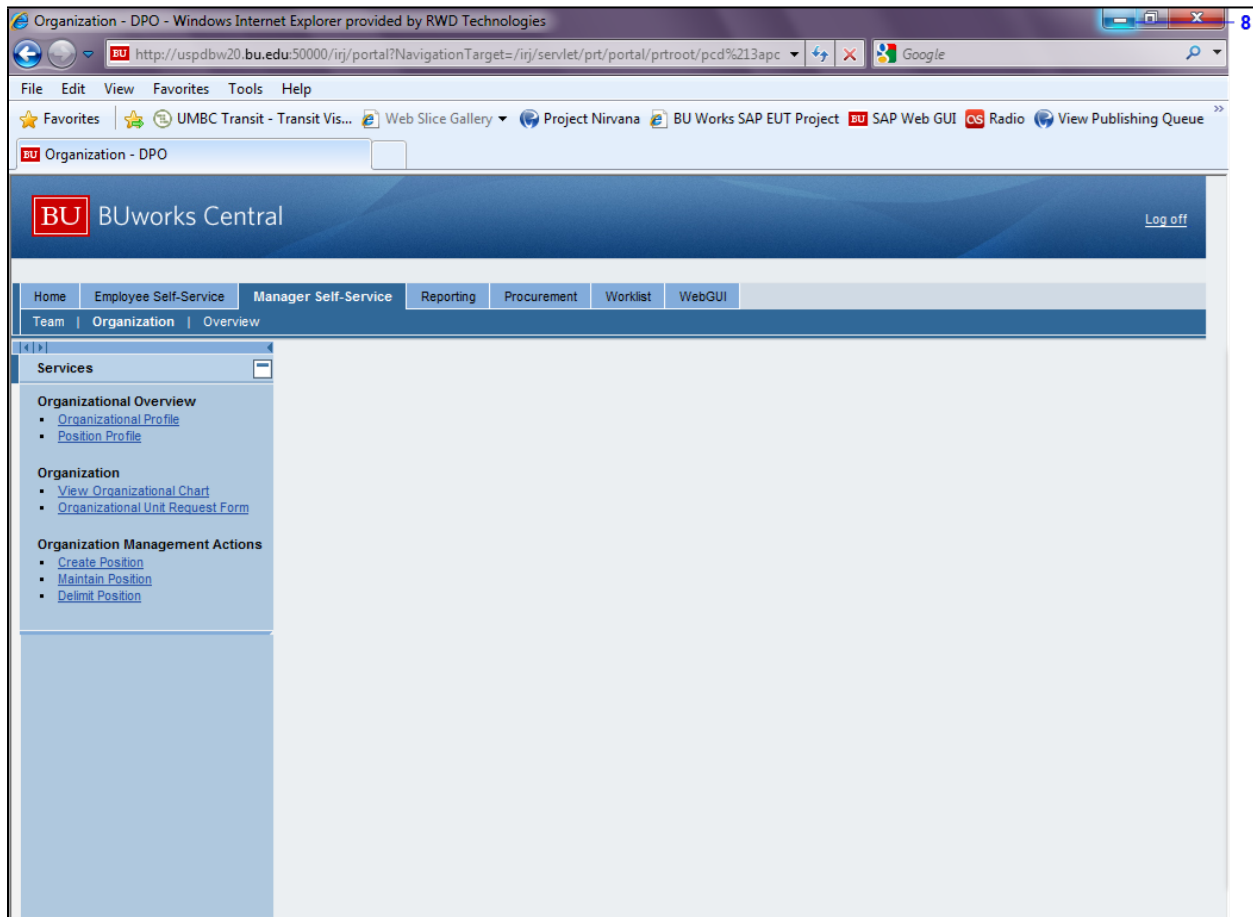
8. Click the **Minimize** button to minimize the web browser and view your desktop.

Desktop

9.

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

BUworks Online Help

Microsoft Excel

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

Microsoft Excel

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

BUworks Online Help

Microsoft Excel

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

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

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

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

Microsoft Excel

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

Microsoft Excel

18. Select the appropriate value from the list.

Microsoft Excel

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

Microsoft Excel

20. Select the appropriate value from the list.

Microsoft Excel

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

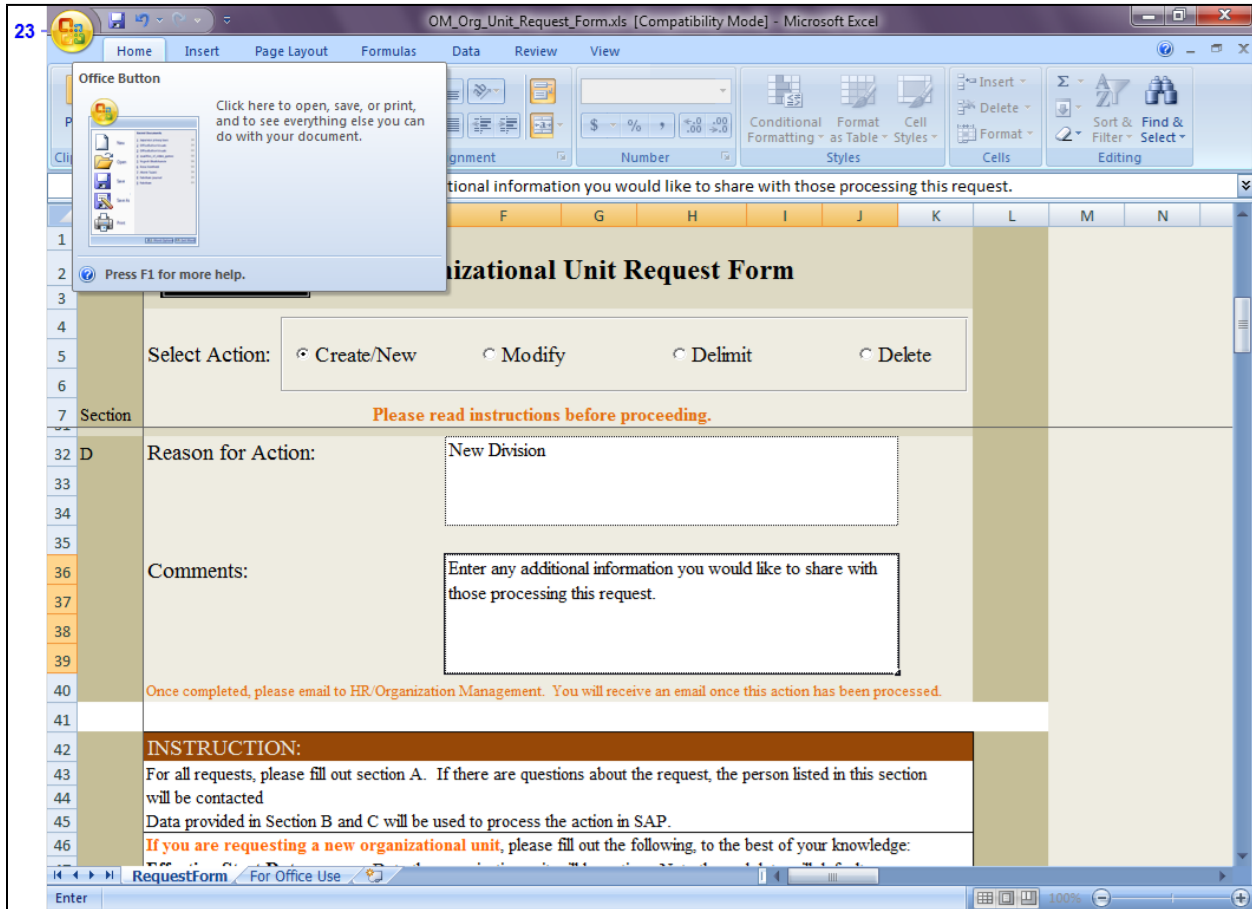| Field	R/O/C	Description
Cost Center Assignment	Required	The ID number of the Cost Center associated with the Organizational Unit. **Example:** 2409990000
General Description (Blurb)	Required	A further description of the Organizational Unit. **Example:** Describe the purpose of this organizational unit.

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

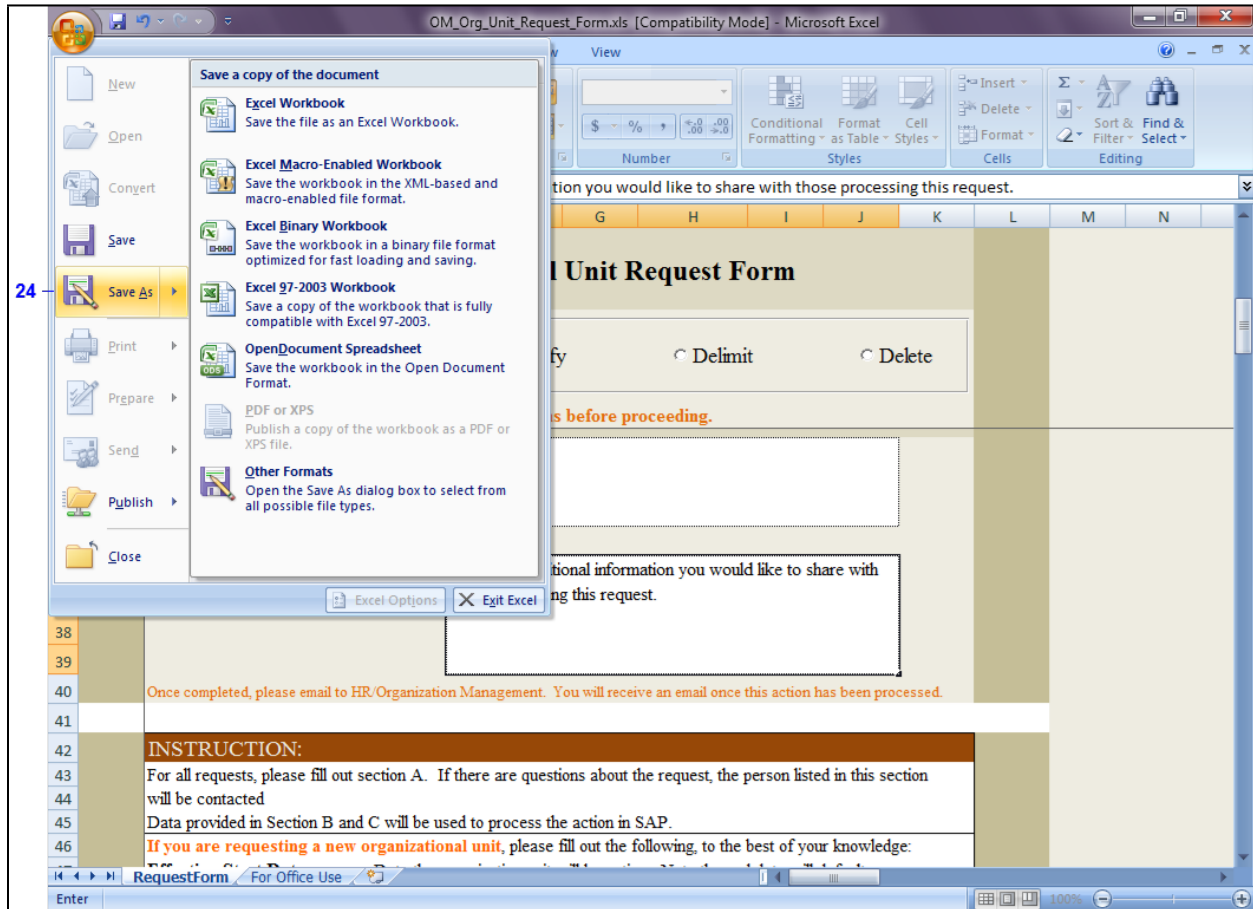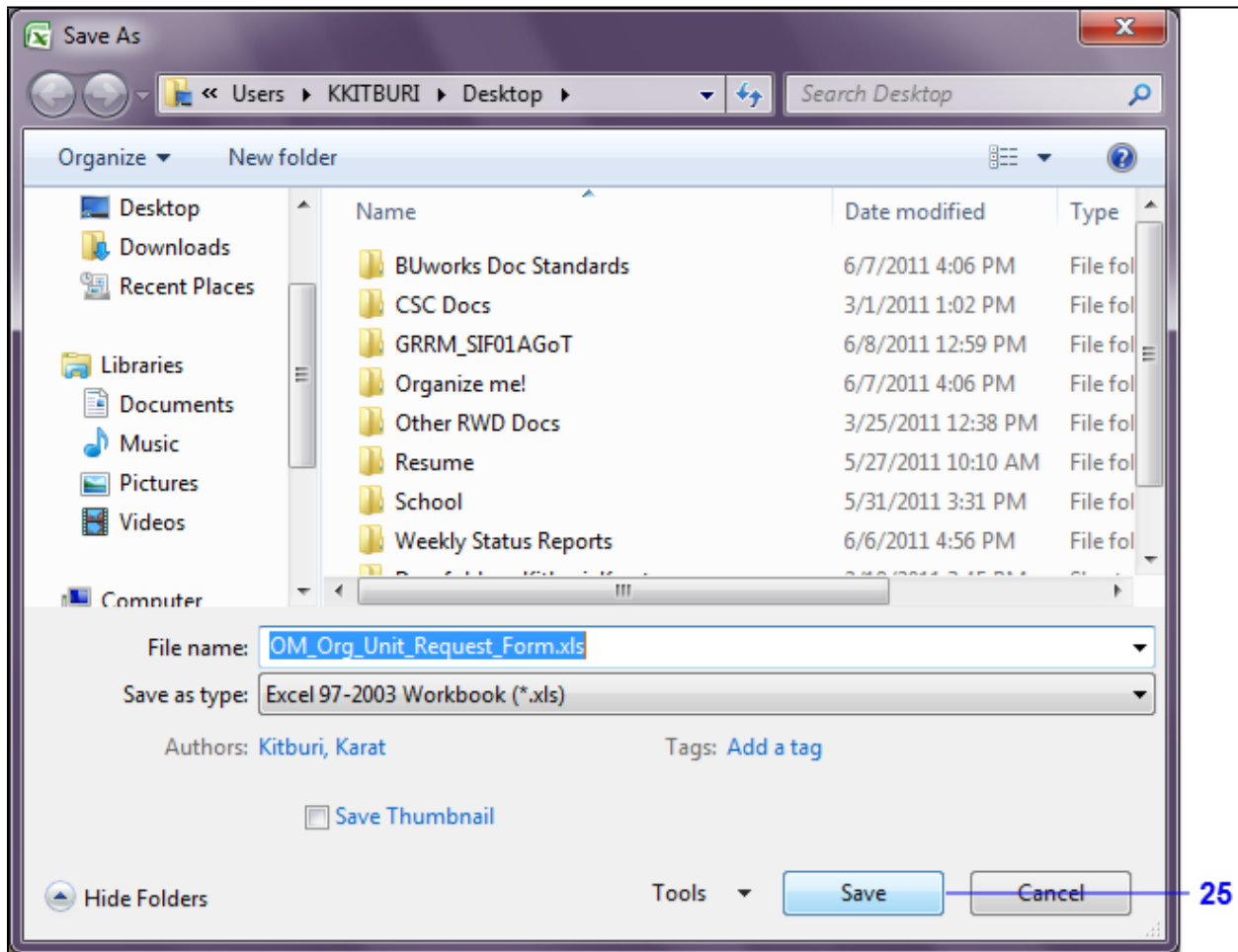| Field	R/O/C	Description
Comments	Required	Explanation or more information related to the transaction. **Example:** Enter any additional information you would like to share with those processing this request.

Microsoft Excel

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

Microsoft Excel

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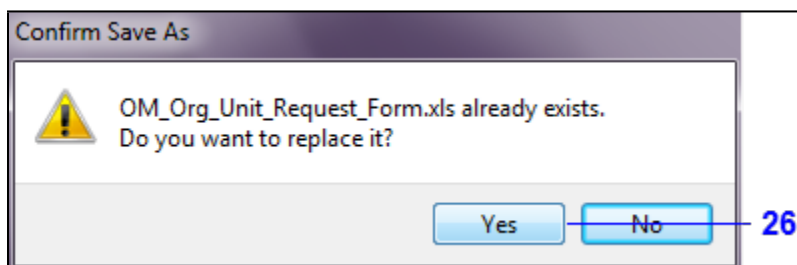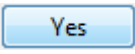
Save As

25.

Click the **Save** button [Save] 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
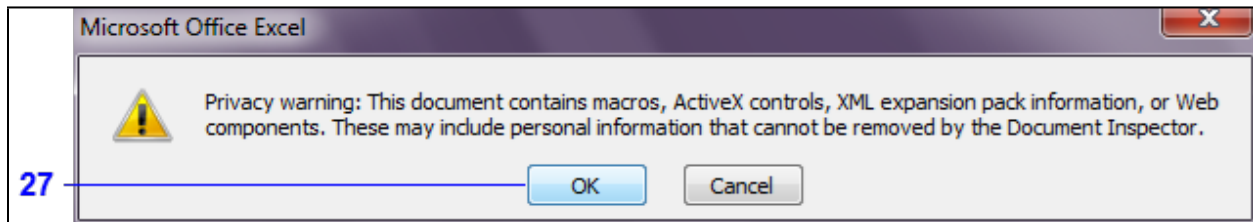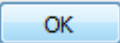

26.

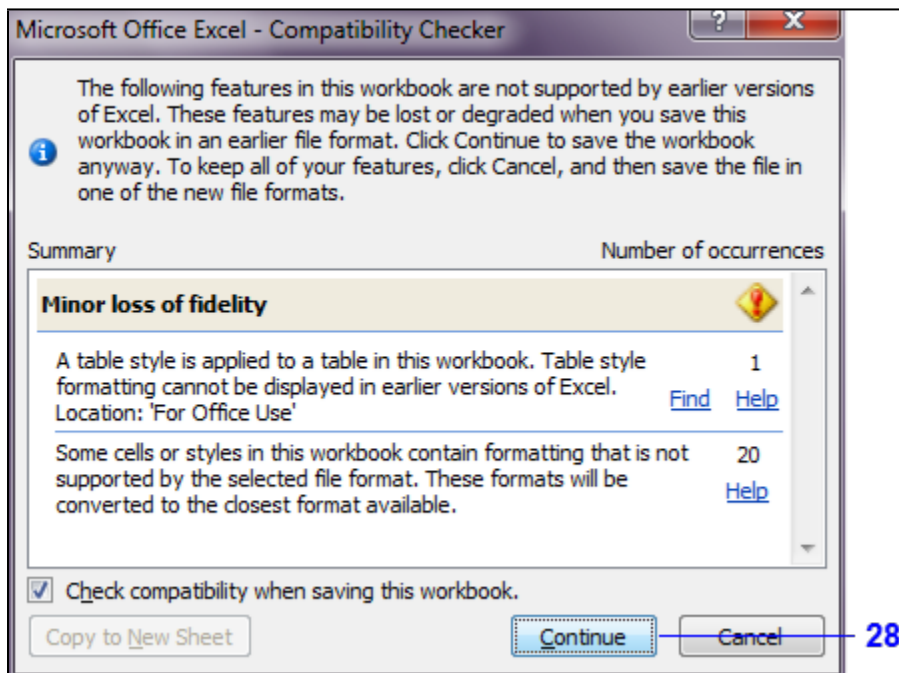Click the **Yes** button [Yes] to replace the original form with the filled in request form.

> 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 [OK] to accept the privacy warning.

Microsoft Office Excel - Compatibility Checker

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

Microsoft Excel

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

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

BUworks Online Help

Manager Self-Service
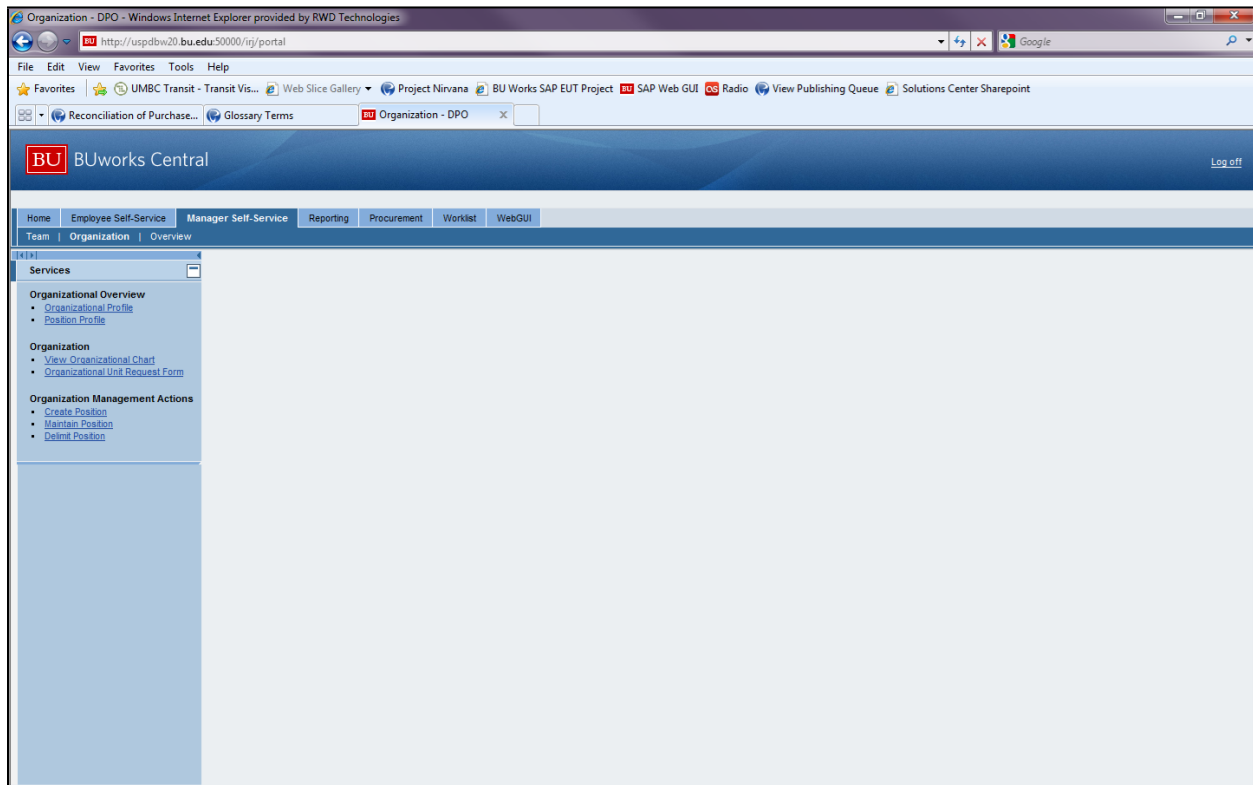
31. The transaction is complete.

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.