

OPP ITS Policy 004: Creating a New Unit

Policy Statement

The Office of Physical Plant (OPP) recognizes that there may be circumstances that result in needing a new Unit (e.g. Maximo Crew) established in the OPP systems.

Purpose

This document outlines the required steps to establish a new unit given the needs of the business. Specifically, this document outlines the application process, approval process, and system update needs.

Process

- 1) An OPP Supervisor must complete a formal email request to their Manager to gain approval of adding a new Unit.
 - a) The email must contain the following questions and answers (please copy and paste the following into the body of your email request and supply the answers):
 - i) What is the business need for this new unit?
 - ii) What is the new Unit name?
 - iii) What employees and their user IDs should move into the new unit?
 - iv) What is the old/current unit of the employees that are moving to the new unit?
 - v) Is there a budget change for any of the employees moving to the new unit?
 - vi) What is the parent unit of the new unit?
 - vii) Is the new unit a division?
 - viii) Who will be supervising the new unit?
 - ix) Is the new unit's supervisor already a supervisor of another unit? If so, which?
 - x) Is the supervisor in charge of the new unit a Manager?
 - xi) Will this unit be assigned work orders?
- 2) If the OPP Manager approves their Supervisor's request for a new unit, s(he) will reply to the email with an approval. If the OPP Manager rejects the request, s(he) can reply to the email with a rejection notice.
- 3) Upon receipt of the Manager's approval, the OPP Supervisor needs to forward the email trail to the OPP Payroll @ opppt@psu.edu, the Maximo Group @ oppmaximo@psu.edu, and the WRC @ OPPAS1@psu.edu and CC: OPP HRCs @ opphrcon@psu.edu.
 - a) Once this has been sent to the above groups, please allow 30 days to complete all system updates.
- 4) In conjunction with OPP HR, OPP Payroll & the Maximo Group will review the new unit submission.
 - a) If needed, these groups may go back to supervisor with additional questions.

- b) If there are no issues with the request, the OPP Payroll and Maximo Group will move forward with the process of adding the new unit. OPP HR will submit or work with the supervisors to submit necessary forms in Workday.
- 5) Considerations when adding the new unit to OPP systems.
 - a) Short and Long names
 - i) Short names must match between Maximo and Abacus.
- 6) System Update(s)

Please note: Step 6 and its underlying tasks must work collaboratively together and will happen on the same business day.

- a) The OPP Payroll s will update Abacus with the following:
 - i) Create the new Unit and include all relevant details
 - ii) Move employees from their existing unit to the new unit
- b) The Maximo Group will update Maximo with the following:
 - i) Create the new Crew
 - ii) Update Person group
 - iii) Assign the new Crew's Default/Supervisor
 - iv) Update Domain(s)
 - v) *Update Open work orders*
 - vi) *Review active records in Maximo (eg. PMs, job plans, etc.)*
- c) WRC will update Abacus OT Events
 - i) Update, if needed, the rules assigned to lists
- 7) Maximo Group notifies the OPP Supervisor, OPP Manager, and the OPP Payroll (opppt@psu.edu) and OPP HR (oppchrcon@psu.edu) when the request is complete in all systems.

Effective Date: 8/22/18

Updated: 5/25/21-Change action of creating new unit from OPP-HR creating to OPP Payroll