Organization Planning Packet
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<td>---------------------------------------------------------------------------</td>
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</tr>
<tr>
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<td>Organization Identifier Codes [New MAU Code + Dept Code = CUC, Org Code (8 digits)]</td>
<td>DPB</td>
</tr>
<tr>
<td>2</td>
<td>Org Template (create/change/verify dept phone, address, FO, etc)</td>
<td>Unit</td>
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<td>3</td>
<td>HR/Payroll Email with Position and Funding Report</td>
<td>HR</td>
</tr>
<tr>
<td>4</td>
<td>Completed HR/Payroll Position and Funding Report</td>
<td>Unit</td>
</tr>
<tr>
<td>5</td>
<td>Security Email Summary and Access Report</td>
<td>IT Services Security</td>
</tr>
<tr>
<td>6</td>
<td>Complete ARM and Security Access Spreadsheet</td>
<td>Unit</td>
</tr>
<tr>
<td>7</td>
<td>Finance Workflow Email with supplemental Finance information for Accounts, Assets, and Finance Routing for existing organizations.</td>
<td>Finance</td>
</tr>
<tr>
<td>8</td>
<td>Finance Workflow (FO's, Delegates, Organization Reviewers)</td>
<td>Unit</td>
</tr>
</tbody>
</table>
## Timeline Worksheet (Cont’d)

<table>
<thead>
<tr>
<th>No</th>
<th>Documents</th>
<th>Who completes this</th>
<th>What does this mean if not completed?</th>
<th>Document Needed?</th>
<th>Target Date Document Due to Unit</th>
<th>Due Date Back to OOI Workgroup</th>
<th>Work Task Completed</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>9</td>
<td>Finance Capital Assets Information</td>
<td>Unit</td>
<td>Assets follow Accounts. Changes in reporting structure do not impact where the assets are assigned. Make sure CAM Processor is assigned to the organization code where the assets reside.</td>
<td>Y / N</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Finance Account edocs</td>
<td>Unit</td>
<td>Units can create, modify, move, or close accounts at any time using the Account or Account Global eDocs in KFS. Budget deadlines and Payroll Account Defaults should be considered. Accounts must all be moved or closed if the organization code is being inactivated in KFS.</td>
<td>Y / N</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Budget Overview (if applicable)</td>
<td>OPB Budget</td>
<td>If Account changes are not made in time for the budget freeze they will not be included for the new Fiscal Year Budget. (Applies to GA, GD, GU sub fund accounts.)</td>
<td>Y / N</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Update Organization Information in OOI (based on step#2)</td>
<td>OPB</td>
<td>Organization changes are not sent to any other systems.</td>
<td>Y / N</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Update HR/Payroll in SAP (based on step#4)</td>
<td>HR/Payroll</td>
<td>This could affect the ability to submit time, salary employees will be paid on default account, and non-salary employees may not get paid.</td>
<td>Y / N</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Update Security Access based on Returned Security Access Spreadsheet (#6)</td>
<td>IT Services Security</td>
<td>Unit will have no access to roles for organization - Time cannot be entered for staff - Payroll will not be generated for staff - HR forms cannot be initiated or approved - Finance access and routing may be affected - Budget application not accessible</td>
<td>Y / N</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Organization Work Completion</td>
<td>ALL</td>
<td>If all previous steps have been completed all changes should be visible in OOI, SAP, Security, KFS, BI Cognos, and all other systems and your organization can perform the business functions of the organization.</td>
<td>Y / N</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Diagram of University System Interactions (Related to Organization Changes)

Start Here

Hey! My Organization is changing! What does that mean to me?

OPB/OOI System (Org data entered here)

- Includes org info for outside systems i.e. DCS and SIS

HR/Payroll – SAP System

- Position, Person and SAP roles entered here

- Includes org info for outside systems i.e. DCS and SIS

Finance/KFS System

- Accounts, Assets, Fiscal Officers, Delegates, and Organization Review entered here by Units

- What happens in KFS? Accounts, KFS Roles & Assets

- File upload from Cognos EP for General Fund funding based allocations

- In case of manual input for KFS roles

OPB/Budgets – Cognos EP System

- Account allocations distributed from here

- Includes leads to outside systems i.e. DCS and SIS

University Security/ITServices System

- Written authorization for multiple system security roles including OPB, KFS and SAP roles

- Includes security roles for many MSU outside systems i.e. Doc Viewer and SIS

Compass

(Don’t forget to think about BI and adjusting Financial or Shadow system reports.)

What does a change do to my General Operations funding?

What happens with my people and how they are paid?
OPB (OOI)
OPB(OOI):
Organization of Interest

• The Organization of Interest (OOI) application is the system of record for all orgs at MSU

• All changes to an org must be completed in OOI before the changes can be migrated to other university systems

• Changes include creation of orgs, movement of orgs from one MAU to another, activation of org in structures, inactivation of orgs
OPB(OOI):
Organization of Interest(cont’d)

• OOI is also the application in which central staff record department address changes, locator changes (telephone), org manager, etc. To accommodate these changes a unit may be required to complete an org template.

• Currently, university staff have no access to the system and any changes are performed by OPB staff.

• For more information on common OOI terms, see the Overview of the Organization of Interest Database and Attributes on the Org Change website.
HR/Payroll
(SAP)
HR/Payroll (SAP): Creating a New Organizational Unit

• No employees exist so no changes are required
• No security or workflow exists so it must be created before the unit is fully functional for HR/Payroll
• Security Roles based on unit number include:
  – HR/Payroll Approver, must have this role and be added to the workflow route
  – HR Unit Time Administrator
  – HR Unit Time Entry Specialist
  – COMPASS

• Access and Time Reporting Concerns-
  – Employees that transfer from one unit to another will appear in both units in CATS for a period of 31 calendar days
  – Depending on the date of the change portal access for employees may be disrupted for one day
HR/Payroll (SAP): Inactivating an Organizational Unit

• All employees must be removed from the unit prior to change
• Workflow and security should be ended for the unit
• Security Roles based on unit number include:
  – HR/Payroll Approver, must have this role and be added to the workflow route
  – HR Unit Time Administrator
  – HR Unit Time Entry Specialist
  – COMPASS
• Access and Time Reporting Concerns:
  – Employees that transfer from one unit to another will appear in both units in CATS for a period of 31 calendar days
  – Depending on the date of the change portal access for employees may be disrupted for one day
HR/Payroll (SAP):
Changing an Organizational Unit Name

Employee Records
• An action will be run on each record for each employee within the organizational unit
  – The action will be run as of the effective date of the name change
  – The action is called “Reorganization” with the reason of “Change Name”
  – All information on the record will be carried forward in this new action, only the name will change

<table>
<thead>
<tr>
<th>Person ID</th>
<th>Pers.No.</th>
<th>Employment Status</th>
<th>Action Type</th>
<th>Start Date</th>
<th>End Date</th>
<th>PSA</th>
<th>Personnel Subarea</th>
</tr>
</thead>
<tbody>
<tr>
<td>3183</td>
<td>00003183</td>
<td>Active</td>
<td>Re Organization</td>
<td>01/28/2013</td>
<td>12/31/9999</td>
<td>OTEE</td>
<td>Other EE</td>
</tr>
<tr>
<td>8733</td>
<td>00008733</td>
<td>Active</td>
<td>Re Organization</td>
<td>01/28/2013</td>
<td>12/31/9999</td>
<td>AP</td>
<td>Professionals</td>
</tr>
<tr>
<td>15753</td>
<td>00015753</td>
<td>Active</td>
<td>Re Organization</td>
<td>01/28/2013</td>
<td>12/31/9999</td>
<td>OTEE</td>
<td>Other EE</td>
</tr>
<tr>
<td>60755</td>
<td>0060756</td>
<td>Active</td>
<td>Re Organization</td>
<td>01/28/2013</td>
<td>12/31/9999</td>
<td>AP</td>
<td>Professionals</td>
</tr>
<tr>
<td>61606</td>
<td>00061606</td>
<td>Active</td>
<td>Re Organization</td>
<td>01/28/2013</td>
<td>12/31/9999</td>
<td>OTEE</td>
<td>Other EE</td>
</tr>
<tr>
<td>41638</td>
<td>00100541</td>
<td>Active</td>
<td>Re Organization</td>
<td>01/28/2013</td>
<td>05/15/2013</td>
<td>GRAS</td>
<td>Grad. Assist.</td>
</tr>
<tr>
<td>127201</td>
<td>00127201</td>
<td>Active</td>
<td>Re Organization</td>
<td>01/28/2013</td>
<td>12/31/9999</td>
<td>OTEE</td>
<td>Other EE</td>
</tr>
<tr>
<td>130888</td>
<td>00130888</td>
<td>Active</td>
<td>Re Organization</td>
<td>01/28/2013</td>
<td>12/31/9999</td>
<td>OTEE</td>
<td>Other EE</td>
</tr>
</tbody>
</table>
HR/Payroll (SAP):
Changing an Organizational Unit Name

• Any pay and cost changes initiated after the name change, but effective prior to the date of change will need to be split:
  – Example:
    • Name change effective 05/01/2013
    • Pay change effective 04/01/2013, initiated on 05/15/2013
    • Unit will need to submit one request for 04/01/2013-04/30/2013 and one request for 05/01/2013-12/31/9999

• The unit number remains the same and all reporting relationships remain the same, no inherent changes to workflow or security

• Access Concerns-
  – Depending on the date of the change portal access for employees may be disrupted for one day
HR/Payroll (SAP): Changing an Organizational Unit Reporting Relationship
HR/Payroll (SAP):
Changing an Organizational Unit Reporting Relationship

- An action will be run on each record for each employee that reports to the organizational unit changed. If the unit that changed is the MAU then all employees in the units reporting to the MAU will change.
  - Action will be run as of the effective date of the change
  - Action is called “Reorganization” with the reason of “Transfer MAU” or “Transfer Unit”, depending on the change
HR/Payroll (SAP): Changing an Organizational Unit Reporting Relationship

• All information on the record will be carried forward in this new action the only changes will be to:
  – Default account for salary records
  – Organizational level cost center

<table>
<thead>
<tr>
<th>Person ID</th>
<th>Pers.No.</th>
<th>Employment Status</th>
<th>Action Type</th>
<th>Start Date</th>
<th>Personnel Subarea</th>
<th>Employee Group</th>
<th>Employee Subgroup</th>
<th>Cost Ctrl</th>
</tr>
</thead>
<tbody>
<tr>
<td>1120</td>
<td>00001120</td>
<td>Active</td>
<td>Re Organization</td>
<td>01/01/2013</td>
<td>Other EE</td>
<td>Non-Union</td>
<td>Proj Pay-Biwkly OC</td>
<td>1580690100</td>
</tr>
<tr>
<td>1183</td>
<td>00001183</td>
<td>Active</td>
<td>Re Organization</td>
<td>01/01/2013</td>
<td>Other EE</td>
<td>Non-Union</td>
<td>B-Weekly On Call</td>
<td>1580690100</td>
</tr>
</tbody>
</table>

• Any pay and cost changes initiated after the name change, but effective prior to the date of change will need to be split:
  – Example:
    • Name change effective 05/01/2013
    • Pay change effective 04/01/2013, initiated on 05/15/2013
    • Unit will need to submit one request for 04/01/2013-04/30/2013 and one request for 05/01/2013-12/31/9999
HR/Payroll (SAP): Changing an Organizational Unit Reporting Relationship

- The organizational unit number remains the same so current workflow and security settings could remain.
- Unit review is recommended to confirm if changes are required.
  - HR/Payroll Approver, must have this role and be added to the workflow route.
  - HR Unit Time Administrator.
  - HR Unit Time Entry Specialist.
  - COMPASS.
- Access Concerns-
  - Depending on the date of the change portal access for employees may be disrupted for one day.
HR/Payroll (SAP): Merging Organizational Units

• Merging units involves almost all of the above changes.
• Most commonly a new unit is created and multiple units are ended and all employees move into the new unit
• Ending Unit(s)
  – All employees must be removed from the ending unit(s)
  – Workflow and security should be ended for the unit(s)
• New Unit(s)
  – Workflow and security should be created for this unit(s)
• Security Roles based on unit number include:
  – HR/Payroll Approver, must have this role and be added to the workflow route
  – HR Unit Time Administrator
  – HR Unit Time Entry Specialist
  – COMPASS
• Access and Time Reporting Concerns-
  – Employees that transfer from one unit to another will appear in both units in CATS for a period of 31 calendar days
  – Depending on the date of the change portal access for employees may be disrupted for one day
HR/Payroll (SAP):
‘Sub’ Organizational (U2)Units

• Parent Unit(s)
  – All employees must be removed from the parent unit(s)
  – Workflow and security should be ended for the unit(s)
  – Hiring attribute (allows forms completion) will be removed
• ‘Sub’ Unit(s)
  – Workflow and security should be created for this unit(s)
• Security Roles based on unit number include:
  – HR/Payroll Approver, must have this role and be added to the workflow route
  – HR Unit Time Administrator
  – HR Unit Time Entry Specialist
  – COMPASS
• Access and Time Reporting Concerns-
  – Employees that transfer from one unit to another will appear in both units in CATS for a period of 31 calendar days
  – Depending on the date of the change portal access for employees may be disrupted for one day
Security
Security Overview:
ARM Forms

• You will only need to submit one ARM for this Org Transition
  
  – Use Generic ARM -
    [link]
    [http://aissecuritycontact.ais.msu.edu/arms/generic.pdf]
  
  – Description should say something like:
    “Attn: IT Services Application Security (Shawn Fulton). Please perform the necessary security tasks to perform Org Change xxxxxxxxx”
  
  – Any security work that needs to be done for this transition will be done under this blanket ARM
Security Overview:
Security Access Changes

• We will send you a security report for the affected Org Codes and the employees within those Org Codes
  • This spreadsheet (sample on Org Change website) includes tabs for
    – NetID’s – of person employed in the Org code
    – D6501 Group Membership – lists security roles for all NetId’s
      » Does not list ESS
    – Mainframe Access – Lists Users for all NetIDs
    – Oracle Access – Lists Oracle access for all NetIDs
    – SQL Access – Lists SQL access for all NetIDs
    – D6501 Access Groups with Unit Authorization –
      » lists all D6501 Group that have authorization to the affected Org Code or Common Unit code
Security Overview:
Security Access Changes (cont)

» Lists all NetIDs that are members of the above groups – even if these people are not employed in the affected Org Code or Common Unit code

– Public Web Application Access
  » lists all D6501 Group that have authorization to the affected Org Code or Common Unit code
  » Lists all NetIDs that are members of the above groups – even if these people are not employed in the affected Org Code or Common Unit code

– SAP HR Workflow Approvers – lists all SAP HR Workflow for the affected Org Code

– SAP HR Workflow Approver Changes – Allows you to setup new workflow for the affected Org Code
Security Overview:
Security Access Changes (cont)

• If you wish to make any changes to your existing security, you must
  – Review each tab of the spreadsheet
  – Follow the instructions on each tab for how to indicate your changes
  – Send the updated spreadsheet back to Org Change team at least two weeks prior to the effective date. As reviewed in the timeline, different changes have different effective dates.
Security Overview:
Other considerations

• Unit or Local Applications/processes – If you have any applications or processes in your office that are based on Common Unit code (2 character MAU Code plus 3 character Dept Code), they will need to be updated

• Any Compass access requires contacting HR (see HR slide) to gather details and make any changes
Finance (KFS)
## Finance (KFS) Overview

<table>
<thead>
<tr>
<th>What you do</th>
<th>What the Finance System does automatically</th>
<th>What we do manually</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update Accounts (including create new/edits/closing)</td>
<td>Wherever the org code exists within KFS the correlating information will be updated.</td>
<td>Accept the Organization Change from the OOI System</td>
</tr>
<tr>
<td>Update Fiscal Officers</td>
<td></td>
<td>&quot;ARM&quot; role changes (done by Security)</td>
</tr>
<tr>
<td>Update Account Delegates</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Update Organization Reviewers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Update Assets</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provide requests for other role changes to Security</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Additional information related to the Finance System can be found at [http://ebs.msu.edu/finance/index.htm](http://ebs.msu.edu/finance/index.htm) or [http://ebs.msu.edu/OOI/index.htm](http://ebs.msu.edu/OOI/index.htm)*
# Finance (KFS) Accounts

<table>
<thead>
<tr>
<th>Where are they created?</th>
<th>Who creates, edits, and closes them?</th>
<th>When are they &quot;Effective&quot;</th>
<th>What should be considered during an org change?</th>
</tr>
</thead>
</table>
| Finance System (KFS)    | Units - Users with the Financial Document Preparer role | Accounts are "effective" as soon as the document has reached a Final status in KFS. Be sure to submit ahead of time to ensure your accounts are "effective" when desired as part of your organization change. | **NEW** - Do I need to create any new accounts? Do I need to move any existing accounts to my new org? Do I need to update any of the information that currently exists on my accounts? When do I need to submit them in order to be part of the budget process?  
**INACTIVATE** - All accounts must be moved or closed that are related to the organization before it can be inactivated in the Finance System.  
**MOVE** - The "Reports To Organization Code" will automatically be updated by the Finance System. However, a unit should still consider if they want to make any other updates to their account information.  
**REPORTING** - In the Finance System and most reports, when assigning an account to a new organization the history of that account will also move and look as though it always belonged to the new organization. |

<table>
<thead>
<tr>
<th>Account Number</th>
<th>Account Name</th>
<th>Organization Code</th>
<th>Organization Allows Accounts</th>
<th>RC Code</th>
<th>Reports To Organization Code</th>
<th>Account Type Code</th>
<th>Fund Group Code</th>
<th>Sub-Fund Group Code</th>
<th>Fiscal Officer Name</th>
<th>Closed?</th>
<th>Account Manager Name</th>
<th>Account Create Date</th>
<th>Account Expiration Date</th>
<th>Legacy Account Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>PC048870</td>
<td>EBSP Augmentation Non-h001</td>
<td>10047307</td>
<td>Yes</td>
<td>75</td>
<td>10076000</td>
<td>NA</td>
<td>PF</td>
<td>PC</td>
<td>Palmer, Erin</td>
<td>No</td>
<td>Palmer, Erin</td>
<td>10/29/2010</td>
<td>06/30/2017</td>
<td>418870</td>
</tr>
<tr>
<td>PN100197</td>
<td>EBS Operations</td>
<td>10047307</td>
<td>Yes</td>
<td>75</td>
<td>10076000</td>
<td>NA</td>
<td>PF</td>
<td>PN</td>
<td>Palmer, Erin</td>
<td>No</td>
<td>Palmer, Erin</td>
<td>09/28/2012</td>
<td>06/30/2017</td>
<td>202328</td>
</tr>
</tbody>
</table>
# Finance (KFS) Assets

<table>
<thead>
<tr>
<th>Where are they created?</th>
<th>Who creates, edits, and closes them?</th>
<th>When are they &quot;Effective&quot;</th>
<th>What should be considered during an org change?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finance System (KFS)</td>
<td>Units: - Users with the CAM Processor Role for direct modifications to the asset. Financial Document Preparer for modifications to the accounts related to organization owner of the asset.</td>
<td>Asset modifications are &quot;effective&quot; as soon as the Asset or Account related document has reached a Final status in KFS. The &quot;effective date&quot; can also depend on the type of organization change.</td>
<td><strong>GENERAL</strong> - If a unit needs to change the Owner Account associated with an Asset they will need to use the Asset Transfer document. If a unit needs to change the Organization related to an asset that is done either by modifying the Organization on the Account itself (Account or Account Global eDoc) or in some cases such as a Parent Org change the system will update these automatically. <strong>NEW</strong> - Am I moving any accounts to the new organization that have an asset assigned that I don’t want to move? Do I need to move any assets to the new organization? Do I have a CAM Processor assigned for the new organization that can manage assets? Example: A unit wants to move assets to a new organization that is being created: Existing Org and Acct To Account moved to new Org by Unit 10032589 - GA013333 40002933 – GA013333 Asset #500289 Asset# 500289 CAM Processor for Org 10032589 or Org 10032000 CAM Processor must be created for Org 4002933 or Org 10032000 <strong>INACTIVATE</strong> - Assets follow the account. A unit will want to review their assets to make sure that any active assets will not be on a closed account. As all accounts must be closed or moved prior to inactivating an organization the assets must either move to a different organization belonging to the unit or to surplus. <strong>MOVE</strong> - Assets follow the account. When a reporting relationship changes the account information is automatically updated by the system and so no Asset changes are necessary. <strong>REPORTING</strong> - In the Finance System and most reports, when assigning an account to a new organization the history of that account will also move and look as though it always belonged to the new organization. As assets belong to accounts, the assets will also look as though they always belonged to the new organization structure.</td>
</tr>
</tbody>
</table>
# Finance (KFS) Roles

<table>
<thead>
<tr>
<th>Where are they created?</th>
<th>Who creates, edits, and closes them?</th>
<th>When are they &quot;Effective&quot;</th>
<th>What should be considered during an org change?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finance System (KFS)</td>
<td>Units - Fiscal Officers, Account Delegates, Organization Review Security - All other role changes based on ARM submissions</td>
<td>Fiscal Officers - Assignments are made on the Account or Account Global eDoc and changes are &quot;effective&quot; once the document goes to Final. Account Delegates - Assignments are effective once the correlating Account Delegate, Account Delegate Global, or Account Delegate Global from Model eDoc is Final. Organization Review and all other role assignments in KFS contain an &quot;Active From&quot; and &quot;Active To&quot; date. Entries can be made ahead of time to be effective for a future date, but cannot be made retroactively.</td>
<td>NEW - Role assignments cannot be made on new organizations until that organization exists in the Finance System. Once it is present a unit will want to consider if any roles should be assigned based on their needs/requirements. INACTIVATE - An Organization CANNOT be inactivated in KFS until all role assignments have been removed from that organization. A unit should indicate to remove all role assignments on the Security ARM related to that organization and end date any Organization Review assignments in the Finance System. MOVE - The &quot;Reports To Organization Code&quot; will automatically be updated by the Finance System. However, a unit should still consider if they want to make any other updates to roles as documents may route differently based on the Organization Hierarchy. REPORTING - Note that many new reports can be run based on the Fiscal Officer assignment. This may be something to consider when setting up roles within the Finance System. ALL - During any Organization Change it is recommended that a unit review it's current Role Assignments to determine if the current structure is meeting Unit and University needs in the most efficient way possible.</td>
</tr>
</tbody>
</table>

*Reminder that these roles only pertain to FINANCE workflow. HR workflow is not managed in KFS. Please review the HR/Payroll and Security sections for information related to HR Workflow.*
OPB Budget (Cognos EP)
OPB Budget (Cognos EP): Budget Allocation

- Review the OOI budget change within Base Budget Reconciliation application as a transfer in and out of MAUs
- As needed, Provost Market and Promotion funding will need to be updated within Base Budget Reconciliation and Salary and Wage Allocation applications
- Nonrecurring allocations such as Off Campus Credit Instruction, Research Facilitation, and Revenue Based Initiatives will need to be updated
- Recurring and nonrecurring program allocations will be reviewed to correct the MAU
- All archived Cognos EP applications will show prior MAU distribution
- Business Intelligence (BI) reports and queries from Cognos EP data use the current MAU within the OOI structure

Salary Distribution

- Data within all salary distribution reports point to the current OOI structure
OPB Budget (Cognos EP):
General Fund Unit Budget Planning

- In May, approved organization change requests are due in the Office of Planning and Budgets and account change requests should be initiated in KFS in order to ensure workflow processing is complete by the June freeze date. This applies to changes affecting sub-funds GA, GD and GU which are part of the general fund budget planning process.

- In June, there will be a freeze on the following changes until the end of August
  - closing GA, GD and GU accounts
  - changes to GA, GD and GU organization relationship
  - changing organization names that have a relationship to GA, GD or GU account

- A review of prior year budget amounts will be done to crosswalk funding to new organization(s)
OPB Budget (Cognos EP): General Fund Unit Budget Planning (cont’d)

- Budget planning security roles are at the organization level. Security roles need to be reviewed to be sure correct employees are included in the role. New organizations will require a security role be added and security contacts to enter approved employees to the role.
- Workflow groups will be reviewed yearly which will include new organizations.
- All archived Cognos EP applications will show prior the MAU and organizations.
- Business Intelligence (BI) reports and queries from Cognos EP data use the current OOI structure.
Reporting (BI)
Reporting Overview

• Generally speaking for most reports, a unit will want to use the “new” organization structure in order to find current and historical data. However, some BI reports separate current from historical data and a unit should be cognizant of their data when reviewing different reports.

• Business Intelligence Support Page (http://ebs.msu.edu/BI/index.htm)
  – These web pages provide materials to assist MSU faculty and staff with running and analyzing reports in the EBS Business Intelligence (BI) System

• Available Reports Link (http://ebs.msu.edu/BI/docs/AvailableReportsBI.pdf)
  – This link includes HR, Finance, Budget, and OOI BI Report Descriptions
Other Points Of Consideration
Other Points Of Consideration:

- Website changes that may be needed (including MSU website changes for search and keywords)
- System checks for hard coding (shadow systems, Excel pivot tables, etc)
- Possible updates needed to internal billing systems and other unit systems (direct bill, web credit, etc.)
- Notification of changes to Travel Office for Direct Billing
- DPPS MSU ID cards may need to be updated
- Notification to Facilities Planning and Space Management for building assignment changes in FAMIS and on web
- COMPASS
- Academic Units may have additional considerations
Contact Information
## Org Change Planning Group:

<table>
<thead>
<tr>
<th>Area</th>
<th>Name</th>
<th>Email Address</th>
</tr>
</thead>
<tbody>
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</tbody>
</table>

## Org Change Website:

[http://ebs.msu.edu/OOI/index.htm](http://ebs.msu.edu/OOI/index.htm)