

Setting Up New Schools and Directorates

The administrative tasks required to set up new organisational units (eg Schools, Directorates, Departments, sub-units, etc) at Keele has become complex and involves a number of different sections in several Directorates. This document summarises the processes involved so that administrators both within the new unit(s) and within Directorates responsible for the set up within business systems, have clear documentation of what they need to do and who else needs to be involved.

The procedures could apply equally to the creation of a new School or Directorate, a new business unit in a School / Directorate and re-organisation of existing directorates, faculties or schools into new structures.

It is important to note that changes can only be made with effect from the start of the following academic year (which commences 1st August) and that such changes need to be confirmed to Central Services by the appropriate area of the University by 31 March at the latest.

MIS Group strongly recommends that a working group with a Project Lead is set up to manage and co-ordinate changes of this nature.

The administrative activities described below require work by staff in Finance, HR, PAA and IT Services.

1. Setting up the Organisation and Account Codes in Finance

Management Accounts in Finance need to decide how the change will be represented in the accounts and budgeting systems. This typically culminates in the creation of new “department codes”. Once these have been determined and set up in the Finance System, administrators in the relevant unit(s) need to be informed. Finance staff will need to notify MIS via it.service@keele.ac.uk so that they are aware of the new codes when they come to undertake work described in further sections below.

2. Setting up in Keele People

HR needs to decide how the change will be represented in Keele People. This typically culminates in the creation of new business units in the organisation structure. In order to undertake this work, HR will require the following information:

- The date from which the new unit will be effective from
- Details of any staff transferring into the new unit, including staff name and the area of the University they are transferring from
- Details of any changes in reporting managers
- Any changes to job titles following the creation of the new unit

Once these have been determined, MIS should be informed via the IT Service Desk so that they can link the new units in Keele People to the appropriate Finance codes. (This is required to enable print recharging to function correctly).

3. Setting up in e-Procurement

The Procurement Section will need to decide how the organisational change will be represented in e-Procurement. Once decided, MIS and they will need to do the set-up in eProcurement and make the necessary links with Finance.

4. Setting up in SCIMS

If the new units are academic units, PAA will need to decide how this will be represented in SCIMS. Once the new units are set up, PAA will need to inform MIS (via the IT Service Desk) so that they can integrate this with Keele People to ensure that staff are correctly allocated to the new academic unit(s) via the Keele People -> SCIMS interface.

Where the new academic unit replaces some or all of an existing academic unit, then all SCIMS tables that have fields referencing the existing academic unit will need to be updated (with the exception of tables relating to exited students). This will be managed by PAA, working with MIS, as follows:

- Where the new academic unit replaces all of an existing academic unit, then all SCIMS tables with fields referencing the existing academic unit will be updated to reference the new academic unit
- Where the new academic unit replaces only part of an existing academic unit, PAA will liaise with the relevant owning School to ask them to confirm which tables need to be updated to reference the new academic unit

5. Office Drives

If access is required to networked office drives, an administrator in the new unit needs to log an IT Service Desk request to ensure these are set up and which members of staff require access.

6. Moving Staff / Moving Office / New Staff

Further to 5 above, staff transferring from one unit to another should contact the IT Service Desk if there are changes to network drive access, google groups or mailing list subscriptions. Under certain circumstances the user name may be changed, but the personal email address will remain the same.

Likewise, if moving to a different building, the administrator for the unit should contact the IT Service Desk to ensure the staff PC's are registered to the new building location.

If the affected school / department has their PC's configured with Desktop Management, the administrator for the unit should contact the IT Service Desk to notify IT Services of the proposed changes.

Existing staff who transfer to a new unit and also need access to administrative IT systems (SCIMS, Finance, Keele People, etc), will need to re-register to obtain access to these systems. The IT Service Desk can advise where the appropriate registration forms reside.

New users need to register for access to IT Services / Administrative Computing Systems in the usual manner. Forms are available on the Keele CMS and the IT Service Desk can advise where they reside.

7. Closing Down Old Units

If the change results in the closure of existing units, all the following groups need to be informed:

- Management Accounts – so they can close down Financial accounts at the appropriate time
- HR – so they can close down units at the appropriate time in Keele People
- MIS – so that they can close down units on the Finance database at the appropriate time and ensure any outstanding IDT's to the old units are dealt with
- Procurement – so they can ensure the old units are archived on the e-procurement system

Document Name	Setting Up New Schools and Directorates
Owner	Information and Digital Services
Version Number	[version number, with 0.1 increments for minor amendments]
Equality Analysis Form Submission Date	[Decision from Equality Analysis and form submission date]
Approval Date	29 March 2017
Approved By	[Committee name]
Date of Commencement	29 March 2017
Date of Last Review	29 March 2017
Date for Next Review	29 March 2019
Related University Policy Documents	[List all applicable]
<i>For Office Use – Keywords for search function</i>	