

University of Michigan – Plant Operations

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Steps needed when setting up a new shop

FIRST STEPS

1. Set up a **Chartfield** for the new shop. **Manager** requesting the new shop to send email to Plant Operations **Division Controller** with explanation and request new shop number and chart fields. **Division Controller** will request the Program, Shortcode & Chartfield for the new shop and send an email to DIS (Data Information Services) requesting a Vendor Code. (**DIS** will request a Vendor Code be established in M-Pathways for billing and associated with the new Chartfield.) The **Division Controller** will send an email documenting this information to **DIS, PPAPO, the Manager of the POCC, and the Manager** who made the request.
2. The **Manager** will determine the supervisor of the new shop (or use the **Manager/General Foreman's** name if no supervisor name is available) and inform **DIS**. **DIS** will create the new shop in FMS once the Vendor Code has been obtained. **DIS** will send an email to the **Manager, PPAPO and the Manager of the POCC**, when the new **Shop Number, Chartfield, and Vendor Code** has been set up, along with the **Supervisor's** name.
3. For payroll purposes, plan on implementing a new shop at the beginning of a pay period. **Manager** requesting new shop to contact PPAPO to determine a mutually agreeable **Implementation Date**. The date should coincide with the date the employees are transferred to the new shop.
4. **Manager** will notify the following departments of the Shop Number, Supervisor, and Implementation Date of the new shop: Work Control (POCC, PM Planning, Senior Secretary), PPAPO, and DIS. (DIS notified of the date to make changes to shop work requests, if necessary) DIS will need instructions on exactly what to do. Determine which work requests (Yearly work requests & One-time work requests) need to have the new shop added. The status of the old shop on the work request will be changed to 80-CMPLETE by DIS automatically when the new shop is added. PM work requests do not need to be reviewed – PM Planning will assist (see #5 below)
5. If the new shop will be included in the PM Program, the **Manager or Supervisor** must keep in mind that PM is generated once a week, two weeks in advance of the begin date for the shop. A new shop will typically require the rescheduling of the entire area involving both the old shop and the new shop, making the transition period take longer for PM's. For the transition to work correctly, PM Planning must be given a minimum of three to four weeks notice, and preferably six to eight weeks notice, prior to the **Implementation Date**. PM Planning will

coordinate the exchange with DIS and DIS will transfer all open PM work requests along with the regular work requests. Changes will also have to be made on the SIM (Serial Inv Master) and the PMT (PM Template) screens.

6. Once the **Implementation Date** has been established, the **Manager, Supervisor or Work Control Coordinator**, should “80-CMPLETE” as many **EXISTING** work requests (for the effected buildings) as possible. The goal is to transfer as few **EXISTING** work requests as possible to the new shop. **DIS** will convert the balance of the **EXISTING** work requests to the new shop on the **Implementation Date**. For each work request transferred to the new shop, **DIS** will create a new phase for that shop and update the associated charge accounts. The **Manager, Supervisor or Work Control Coordinator** must also determine which Yearly Work Requests the new shop must be added to and send an email to DIS with the list of work requests. The transfer of PM work requests will be coordinated by the PM Planning group with DIS.
7. Determine which staff members will be transferred into the new shop - **Manager or Supervisor** to provide list of names, employee numbers, office address, phone numbers, etc., to **PPAPO, the POCC, PM Planning, and the Division Controller**. (POCC will update the Emergency Call-Out List, the Plant Ops phone book and the Division Controller will calculate the billing rates for the new shop, as well as the shops that the people are moving from.)
8. When setting up a new Zone Maintenance Shop, the **Manager or Supervisor** will determine building assignments for mechanics and notify the **POCC and PM Planning**. If transferring people from an existing shop to a new shop, determine who becomes responsible for the duties of the transferred mechanics. (In other words, who is now taking care of the duties they left behind?)

ON THE IMPLEMENTATION DATE FOR THE NEW SHOP

9. The new shop should start on a “Pay Monday” (the Monday before a payday). It is the responsibility of the **Supervisor to enter the time cards from the old shop and contact PPAPO to let them know** the time card entry is complete. **PPAPO will then post the time cards.**

After the time cards have been posted, **PPAPO will set up the new shop for time card entry and** notify the **new shop Supervisor** that the shop is set up for time card entry. The **Supervisor will then be responsible for entering time cards for the new shop.** **PPAPO** will transfer the **Supervisor** to the new shop at the same time the staff is moved.

If the new shop is replacing an old shop(s) **PPAPO will also set the old shop(s) to an inactive status** on FMS.

10. When the new shop has been added, the **Supervisor** will notify the **Manager of the POCC** (to add the shop to the attendance database and the POCC will then begin adding the new shop to work requests) and the **Senior Secretary in Work Control** (to begin running performance reports). **DIS** will run a conversion program on the evening of the first day the new shop is activated to convert the work requests into the new shop.

FINAL RESPONSIBILITIES

11. The Plant Operations Web Site will need to be updated. It is the **Manager or Supervisor's** responsibility to inform the **Plant Operations Webmasters** of the changes.
12. **Supervisor** may need to follow-up with **PPAPO** on paycheck distribution for employees receiving paper paychecks to assure delivery to the correct shop. If paychecks are direct deposited, no action is needed.