

Organizational Unit_Delimit

PO10

Change History

Update the following table as necessary when this document is changed:

Date	Name	Change Description
09/14/2004	Brian Desilets	Corrected examples values for some steps.
11/10	A Farrell	Script standards
3/7/06	Chylynn Hansel	Training Update
7/3/2008 – 7/7/2008	Janet Pasion	Update steps to reflect standards, correct transaction codes and additional information.
7/16/2008	Lesa Terry	Reviewed (.25 mins)
7/17/2008	Janet Pasion	Edits reviewed and accepted. (1 hr)
8/1/2008	Chylynn Hansel	Reviewed (.25 minutes)
8/7/2008	Janet Pasion	Edits reviewed and accepted (1hr)
8/20/2008	Carina Benavente	Reviewed

Purpose

Use this procedure to delimit an Organizational Unit.

Trigger

Perform this procedure when an agency no longer needs a department, division, project, etc. (organizational unit) due to reorganization or for other business reasons.

Prerequisites

- Organizational Unit must exist with all required infotypes.
- Check relationships to make sure there are no active relationships. (See **Helpful Hints** for additional information)

In order to perform this transaction you must be assigned the following role:

Organizational Management Processor

Menu Path

- Human Resources → Organizational Management → Expert Mode → Organizational Unit

Transaction Code


PO10

Date	Procedure Update Log
8/20/2008	Update Step 1 to reflect the correct transaction code. Also update the entire procedure to include additional detail to steps and Helpful Hints.

Helpful Hints



When you delimit an organizational unit, all relationship will be delimited.










- Click  (Overview) for an overview of all actions associated with the *Relationships* (1001) to ensure there are no active relationships. Active relationships are indicated by an end date of 12/31/9999.
- The following active relationship types will need to be moved to another active organizational unit:
 - B002 (Is line supervisor of) reflects the Organizational Unit

- o B003 (Incorporates) reflects the assigned Position numbers



Note: The procedures for moving these relationship types are located at the end of this procedure.

The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

Message Type	Description
Error 	Example:  Make an entry in all required fields. Action: Fix the problem(s) and then click  (Enter) to proceed.
Warning 	Example:  Record valid from xx/xx/xxxx to 12/31/9999 delimited at end. Action: If an action is required, perform the action. Otherwise, click  (Enter) to proceed.
Confirmation  or 	Example:  Save your entries. Action: Perform the required action to proceed.

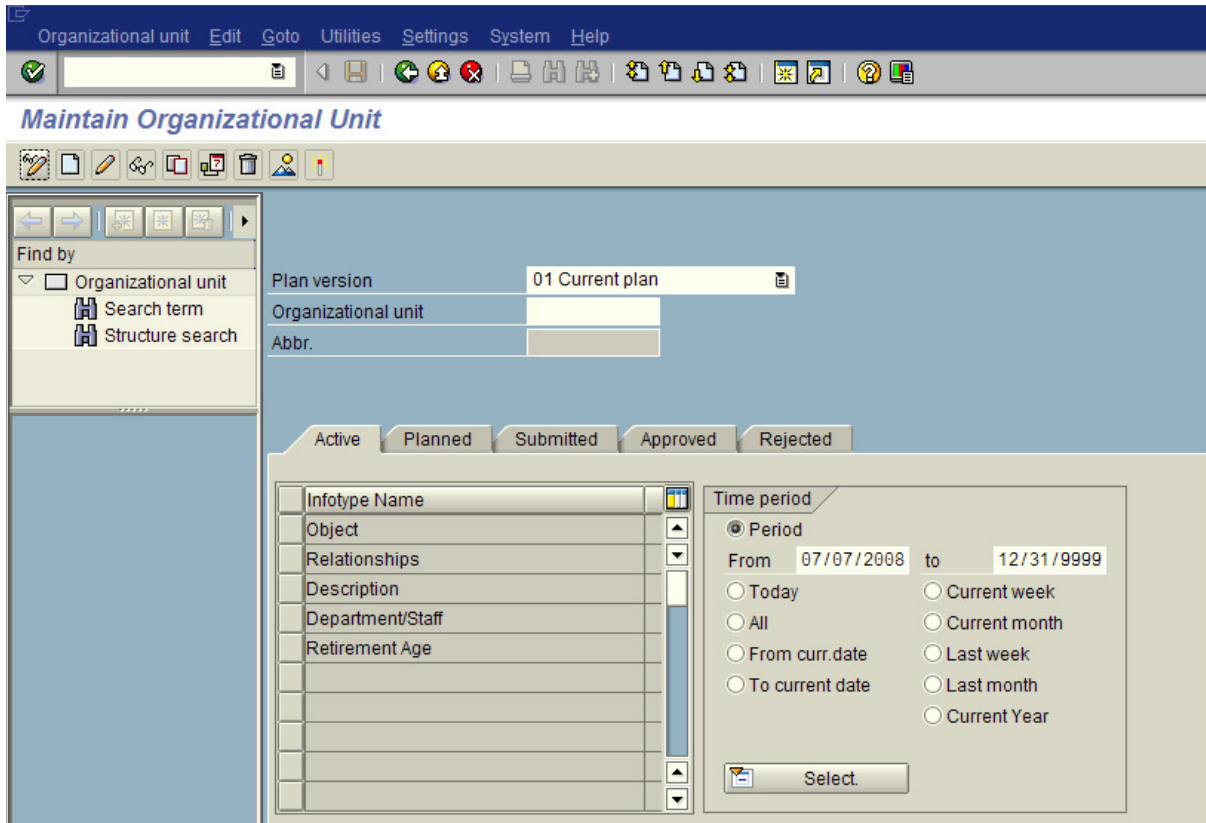
The procedure includes field descriptions along with their conditions. Their definitions are shown below:

R/O/C	Definition
R	designates a “required” entry necessary to proceed in this transaction.
O	designates an “optional” entry.
C	designates a “conditional” entry that may be required under certain conditions.


Procedure


1. Start the transaction using the menu path or transaction code **PO10**.

Maintain Organizational Unit

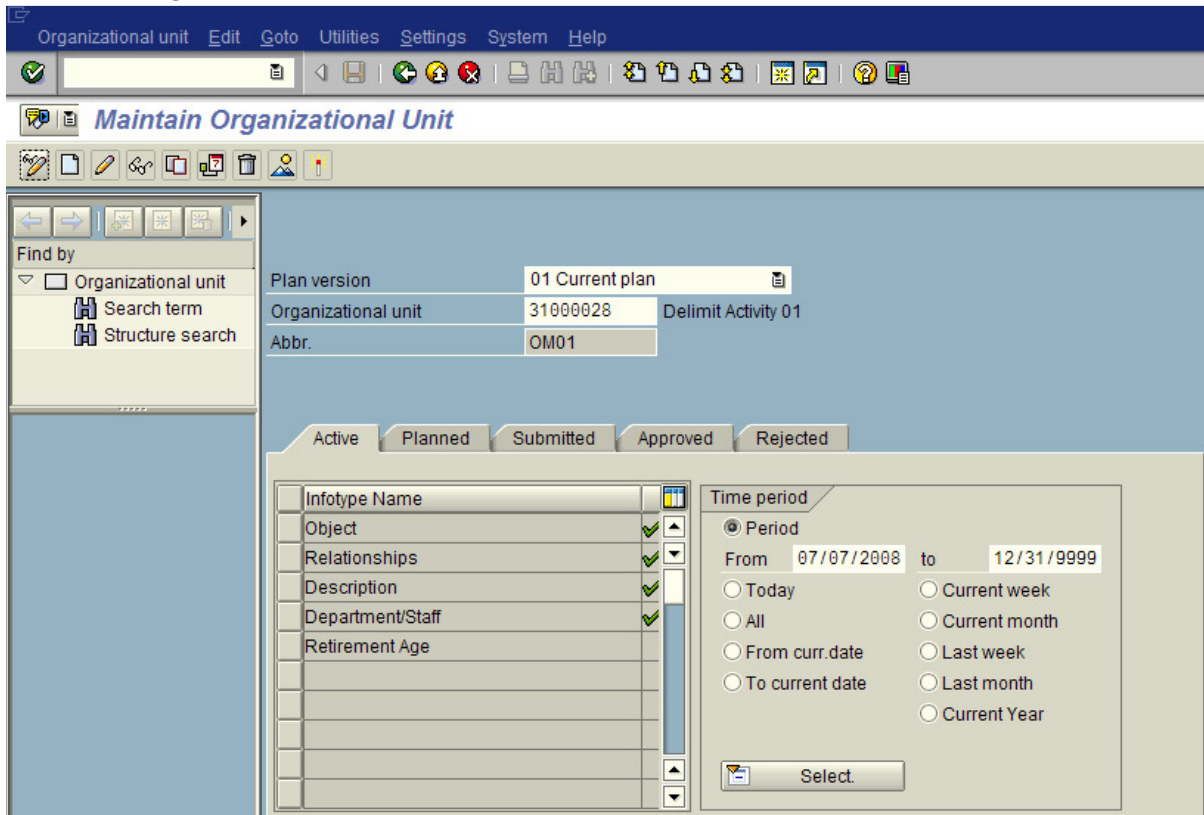


2. As required, complete the following field:

Field Name	R/O/C	Description
Organizational unit	R	<p>Represents departments, regions, divisions, units or other groupings within an Agency. Relationships between organizational units are used to determine the hierarchy within the organizational structure.</p> <p> State of Washington Organizational Unit's object id number begins with a 3.</p> <p>Example: 31000028</p>

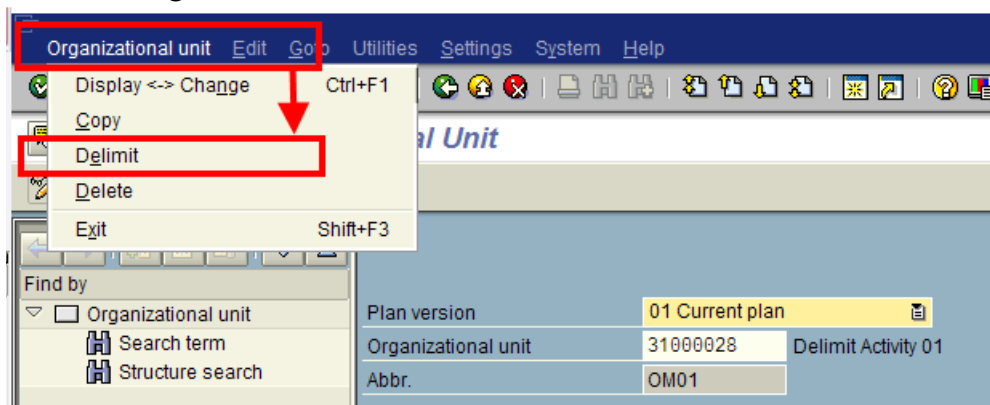
3. Click  (Enter) to validate the information.

Maintain Organizational Unit



4. On the menu bar, select **Organizational unit**→**Delimit**.

Maintain Organizational Unit



5. From the **Maintain Plan Data: Delimit Object** window, complete the following field:

Field Name	R/O/C	Description
Delimit date	R	<p>The delimit date is the last day the record is active. The last day the Organizational Unit is active.</p> <div style="display: flex; align-items: center;"> <p>It is recommended that the delimit date align with the HRMS Payroll Periods. For example on the last day of the pay period (15th) or last day of the month.</p> </div> <p>Example: 07/31/2008</p>

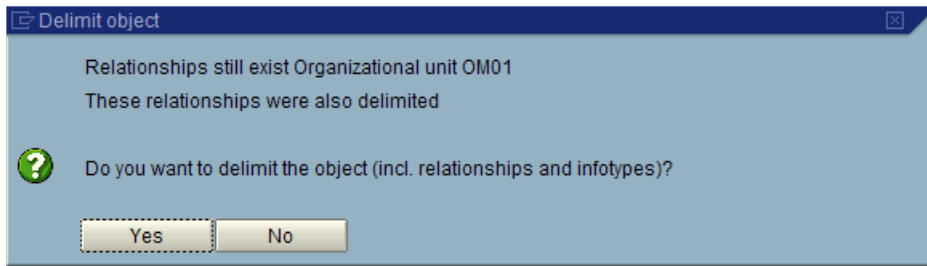
Maintain Plan Data: Delimit Object



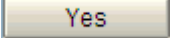
Do not check the Historical rec. box when delimiting. If checked, the Organizational Unit cannot be reinstated if needed.

6. Click (Delimit) to assign an end date to the record.

Delimit object



Make sure there are no active relationships with positions before selecting "Yes". To check for active relationships, see the **Helpful Hints** Section located at the beginning of the procedure.

7. Click  to proceed.

8. You have completed this transaction.

Result

You have delimited an Organizational Unit.

Comments

Related Procedures:

- [Maintaining Organizational Unit to Organizational Unit Relationships](#)
- [Position to Organizational Unit Relationships Create and Maintain](#)