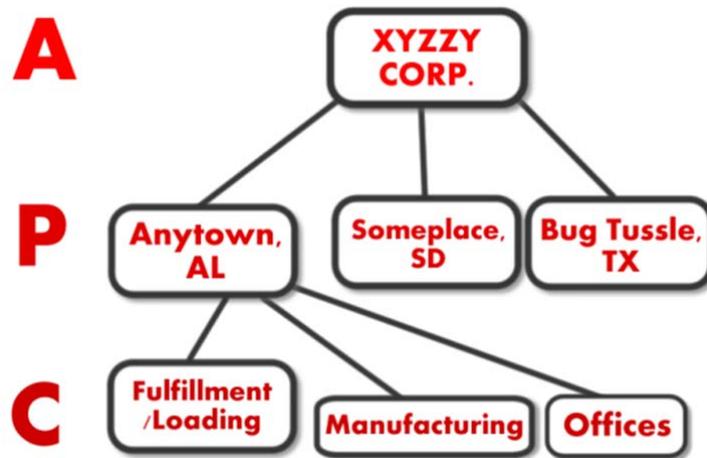# The 4-tier Hierarchy and SOPA Roles

We designed SOPA so that we could "model" companies from the smallest single-site company (like many of you) to large multi-level companies. We refer to the four levels as the "RAPC" hierarchy. The acronym is composed of the initials of the levels at one of our early clients (Region / Area / Plant / Committee). Obviously, not all of our clients use all four tiers! For small, single-committee installations, a single C-unit may be sufficient. But we have been successful at modeling even the largest clients with the four RAPC layers.

As we discussed in *SOPA Observer* #6, each of the levels can be "aliased" to a different term, and your buttons and explanations in SOPA might reflect that. For instance, some of your installations use the term "Committee" for a C-unit; others use "Site." Others use "Business Unit" or even "Equipo Guía" – we try to match terms that are displayed on the User Interface to what you use in your company. This could make this article very confusing, both for you and me! I'm going to stick to the generic classification that makes sense to SOPA; whether you call that bottom unit "Committee" or "Site", the SOPA software deals with it as a C-unit.

The most important level is "C" (or the SOPA committee domain). This is where the action takes place. Checklists belong to the individual committee, and observations that are done at this domain also belong to the C site. Most of the observers are at C-level. Depending on the size of the company, the remaining personnel are assigned to one of the management oversight levels (R, A, or P).

Here's a simple diagram that illustrates this. Let's consider the site that does order fulfillment (and includes the loading dock) at the Anytown plant of XYZZY Corporation. It is the bottom of the branch that has Anytown AL and XYZZY above it.

The first thing to notice about the diagram is that it's a 3-level hierarchy, with C, P, and A levels (R isn't needed in this example, but it would be the level above A, if we needed it). The "action" always takes place at C-level because that's where the bulk of the employee/observers are assigned, the BBS steering committee is there, the checklists belong to that committee, and the observations done with those checklists also reside at C. In this example, there are three committees under Anytown AL: 1) Fulfillment/Loading, 2) Manufacturing, and 3) Offices. In general, we don't want personnel from Manufacturing or Offices to have access to Fulfillment data, unless there is a need to know.

For security reasons, most employees have limited access to most SOPA functions, and to other people's data. This is accomplished by assigning a **SOPA Role** to each person who will be participating in the BBS process.

Managers and administrators who are responsible for all three committees at Anytown are *usually* assigned to the P level (there are important exceptions). Managers who need to access data from all three "plants" are assigned one level further up at the A level ("XYZZY") so they can drilldown to the right P-level unit and its committees. At each level, there is a role that has privileges to do almost anything in SOPA (a Facilitator or Agent of the Committee), and the people who manage the data.

SOPA Roles at C-level

Even though C is the lowest level of the RAPC hierarchy, it is where the bulk of the employees are assigned, and where the safety steering committee, checklists and observations reside. We sometimes call units at this level "committee domains" or simply "sites." There is a set of SOPA Roles for employees that are assigned to C-level. Most of these Roles are restricted to their own domain,

and those Roles cannot navigate to see any other committees.

- **Observer** – most of the committee's human resources are Observers. They should be trained to do BBS observations.
- **Self-Entering Observer** – these are Observers, but they are responsible for entering their own data. Since we know who the Observer is, we can skip some of the questions, so the data-entry process is a little more streamlined.
- **Data Management** – people with this role can enter and view observation data, as well as data about employees. But they can only do so within their own domain.
- **Participating Data Management** – these are people who are assigned to one committee domain and are counted in the headcount for that domain, but they can perform data management duties at the other committee sites. "Participating" means that they can perform observations within their home domain like any other Observer, but they can navigate to other domains to perform data management.
- **Agent of the Committee** – this is the "go to" facilitator of the committee, who has broad privileges but only within the current committee.
- **Participating Management** – much like the Agent role, and much like the Facilitator role at P-level (see below), this person has broad privileges over several committee domains, but counts against the headcount of the current domain site.

SOPA Roles at P-level

Persons assigned to P and higher are usually management personnel who are responsible for overseeing several committee domains. (Not every SOPA installation has a P level; if your company only has a single committee domain, it probably does not need a P level).

- **Facilitators** have the privileges to do almost everything. They are like Agents, but are not assigned to a particular domain and do not count against anyone's headcount. They can navigate by drilling down to any of the committee sites below them.
- **Database Administrators** (DBAs) can perform data management duties for more than one domain.

- **Charts Only** – this is a Role for persons who need to be able to monitor the BBS processes at the committee sites by looking at charts, but they cannot do much more.

SOPA Roles at A-level

- **Area Facilitators** are analogous to Facilitators, but for a larger group of domains.
- **Area DBAs** can perform data management all the way down to C-level.
- **Area Management** is similar to the Charts Only role at P-level. They can see charts for any of the domains, or groups of domains, below them in the hierarchy.

SOPA Roles at R-level

- **Regional Facilitators** have extensive privileges, for a larger group of domains.
- **Regional Data** can perform data management all the way down to C-level.
- **Corporate** is similar to the Charts Only role at P-level, or Area Management. They can see charts for any of the domains, or groups of domains, below them in the hierarchy.

There are also two other specialized Roles: BBSPro and Tech. We need privileges that you don't, but Agent, Facilitator, Area Facilitator and Regional Facilitator can do most of what we can do.

The short descriptions of each Role above are not necessarily complete, but are intended to give you an overview of the differences between Roles. If you need a precise picture of who can do what, ask us for a copy of the currently up-to-date "Roles by Privilege" matrix.

In the discussion above, we have talked about restrictions on the ability to navigate to other sites and other RAPC branches. An important exception to these restrictions is the **Guest Observation**, which will be covered in a future newsletter.

> *The RAPC hierarchy has successfully modeled all of our clients' organizations. The various SOPA Roles at each level ensure that*

> *employees can do what they need to do for the BBS Process to succeed, but do not have more power than they need.*