How to create Organisation structure, Cost Centre & Users

<table>
<thead>
<tr>
<th>How to create Organisation structure, Cost Centre &amp; Users</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1 - Set up the Organisation Structure</strong></td>
</tr>
<tr>
<td>▶ Click on the Admin tab</td>
</tr>
<tr>
<td>▶ Select the People tab</td>
</tr>
<tr>
<td>▶ Select Manage Organisation</td>
</tr>
<tr>
<td>▶ Click on the &lt; sign to open up the Organisation structure</td>
</tr>
</tbody>
</table>

This is an Administrative function and is only available to persons with the ‘Scientist Administrator’ role.
How to create Organisation structure, Cost Centre & Users

The Organisation Tree follows a specific hierarchy – as per screenshot on the left:

- **Site Level** – In this case UNSW
- **Faculty Level**
- **School Level**
- **Unit Level** (if applicable) – If there is a special research unit e.g. 3SW, create it at this point or skip to level 5
- **Research Group Level** – Create Supervisors/principal investigators
  - For consistency, this naming follows a specific format:
  - [School]- [First Name] [Last Name]
  - *Note: the lack of spaces either side of the hyphen '-'*

- To add a new entry, click on the site under which you want to place your new entry and then click on e.g. to create a Faculty, click on UNSW, or to create a School click on the corresponding Faculty

How to create Organisation structure, Cost Centre & Users

To create a research group under TNF in the School of SoMS, click on TNF

Then click the button

Enter the details in the appropriate format

[School]-[FirstName] [LastName]

Click OK

New entry is created
How to create Organisation structure, Cost Centre & Users

### Step 2: Set up the Cost Centre Groups

*Take care when creating these as they CANNOT be edited or deleted!*

1. Click on ‘Admin’, then ‘People’, then ‘Manage Cost Centre Groups’

2. To create a New Cost Centre Group click

   ![Add Cost Center Group](image)

3. Enter the name of the new group

4. Follow the consistent naming format i.e.
   
   `[School]-[FirstName] [LastName]`

   *Note: Use an hyphen ‘-’ between school and name.*

5. Repeat the above steps until all cost centre groups for the school/centre are created
Step 3: Set up the Cost Centres

- Click on ‘Add Cost Centre’
- Enter the name of the cost centre
- Follow the following order when naming the cost centres to facilitate copying to the people-soft purchasing system (note: put organisation first here to facilitate searching in ERM). Thus the order is:
  [Organisation]-[Fund]-[Project] NO SPACES, HYPHENS between sections
- Finally assign the Cost Centres to a Cost Centre Group by:
  - Click on the Cost Centre Group (highlighted)
  - Then click on the Cost Centre (highlighted)
  - Then Click
How to create Organisation structure, Cost Centre & Users

Notice: This Cost centre is now associated with the highlighted Cost centre group

Note: To deselect a cost centre, click on the cost centre then click on
How to create Organisation structure, Cost Centre & Users

Step 4: Set up Users

- Click on the ‘Admin’ tab, then the ‘People’ tab then click on the tab

- This opens up the ‘Person’ pop up window. Follow the prompts as shown below
How to create Organisation structure, Cost Centre & Users

- Enter the Last Name and First Name
- Select the appropriate Organisation as created in Step 1.
- For User ID: Enter the person’s zID
- Enter Email in the following format: zID@unsw.edu.au. This is applicable for both staff and students and is critical for ensuring that periodical email alerts can be sent to all users.
- Select the person’s Primary Location (click on the icon to find the person’s main lab room number)
- Select the appropriate Cost Centre Group created in Step 2.
- Search for the Group on the left
- Select it and press the button to add it to the list on the right
- If your selection is incorrect, highlight the entry and press 
- Select the default Cost Centre (account code) to be used for purchasing
- Select the appropriate Role (refer to Role Profiles)