How to create Organisation structure, Cost Centre & Users

This is an Administrative function and is only available to persons with the ‘Scientist Administrator’ role.

**Step 1 - Set up the Organisation Structure**

- Click on the Admin tab
- Select the People tab
- Select Manage Organisation
- Click on the sign to open up the Organisation structure
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
Step 2: Set up the Cost Centre Groups

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

- Click on ‘Admin’, then ‘People’, then ‘Manage Cost Centre Groups’
- To create a New Cost Centre Group click
  ![Add Cost Center Group]
- Enter the name of the new group
- Follow the consistent naming format i.e.
  [School]_[FirstName] [LastName]

Note: The use of an underscore ‘_’ between school and name.

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, B=NO HYPENS 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

Chemical Inventory Management

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

Chemical Inventory Management

- 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 – this is really important for email alerts (use official university email address)
- Select the person’s Primary Location (click on the ▶ 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
  - Scientist 1 – Search internal inventory and search hosted catalogs but cannot create requisitions
  - Scientist 2 – As Above plus can create requisitions i.e. senior PhD or PostDoc
  - Scientist Admin – As Above plus with Admin functions as per this cheatsheet (envisage one or two of such roles per school)
How to create Organisation structure, Cost Centre & Users