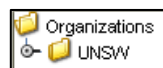
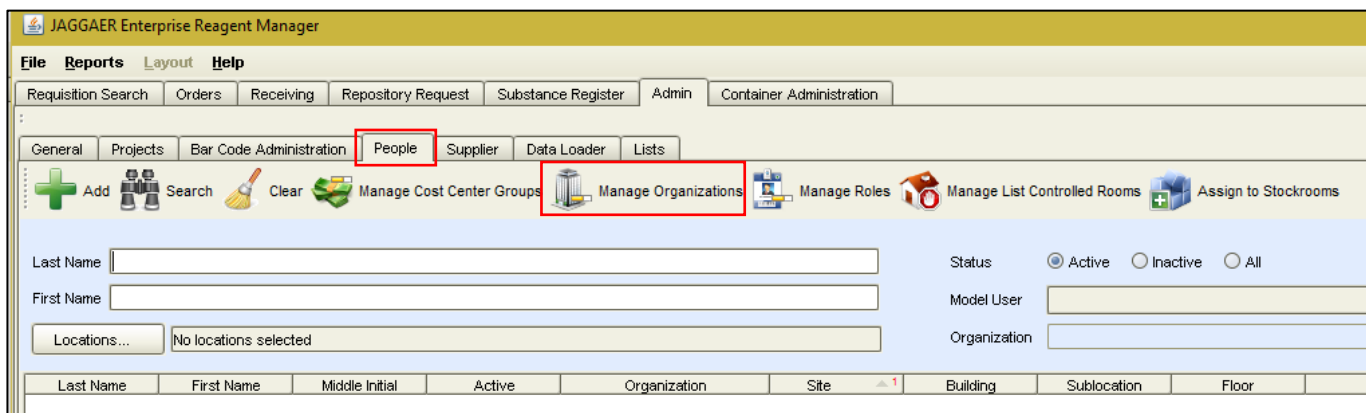
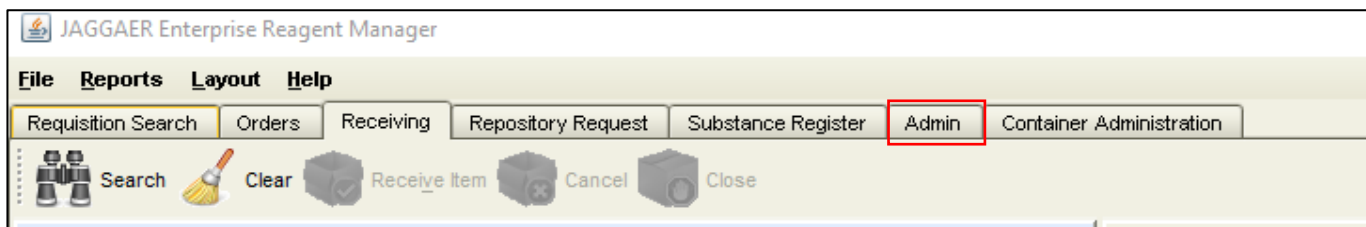



How to create Organisation structure, Cost Centre & Users

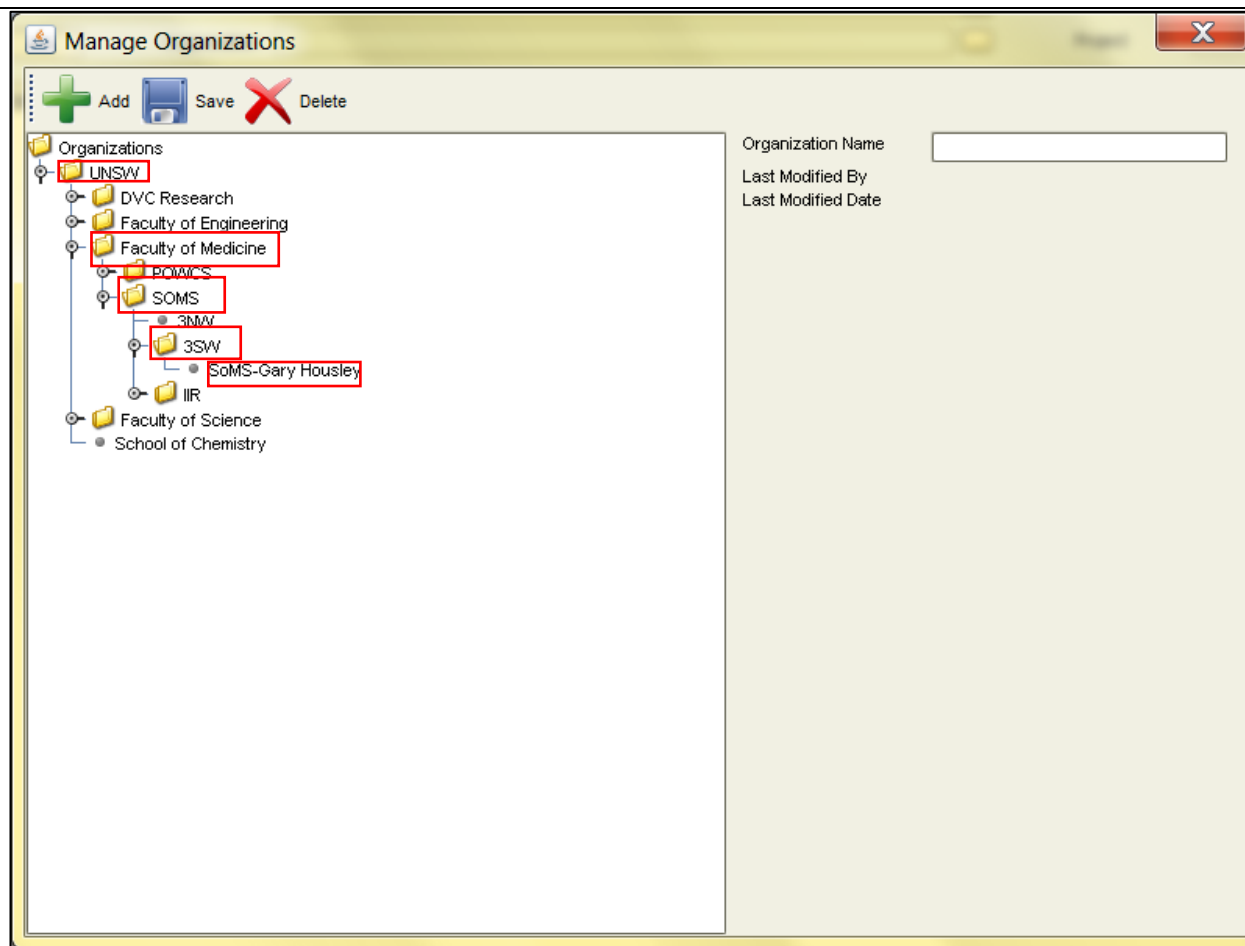


This is an Administrative function and is only available to persons with the 'Scientist Administrator' role.


Step 1 - Set up the Organisation Structure

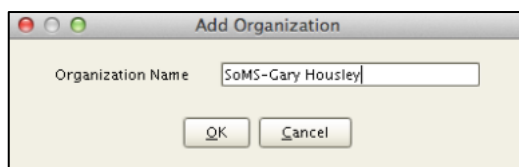
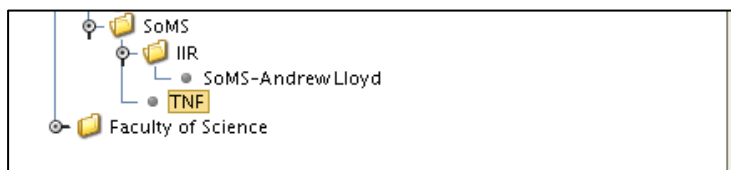
- ▶ Click on the **Admin** tab
- ▶ Select the **People** tab
- ▶ Select **Manage Organisation**
- ▶ Click on the  sign to open up the **Organisation** structure

How to create Organisation structure, Cost Centre & Users

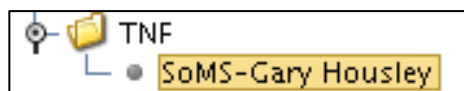



The **Organization Tree** follows a specific hierarchy – as per screenshot on the left:

- ▶ **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

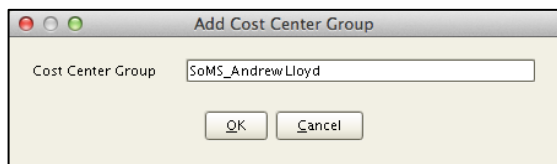
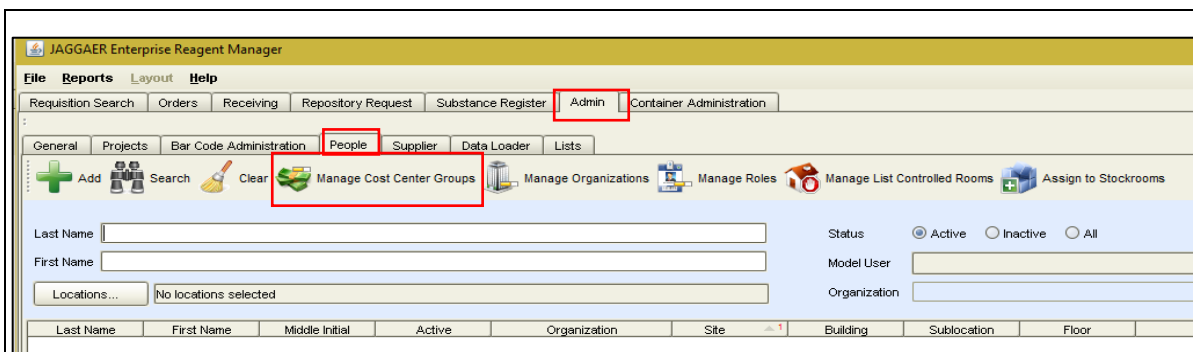


A screenshot of a dialog box titled 'Add Organization'. It has a text input field labeled 'Organization Name' containing the text 'SoMS-Gary Housley'. Below the field are two buttons: 'OK' and 'Cancel'.



- ▶ To create a research group under TNF in the School of SoMS, click on TNF
- ▶ Then click the  Add button
- ▶ Enter the details in the appropriate format
[School]-[FirstName] [LastName]

- ▶ Click OK
- ▶ New entry is created

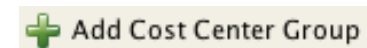


Step 2: Set up the Cost Centre Groups

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



▶ Enter the name of the new group

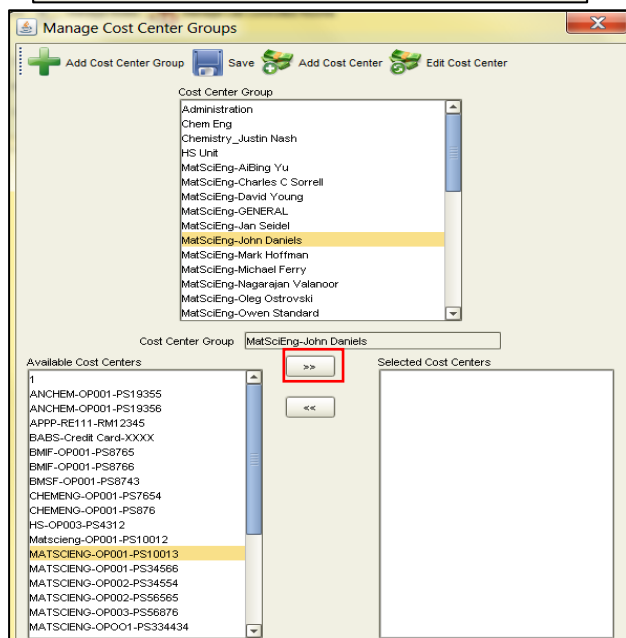
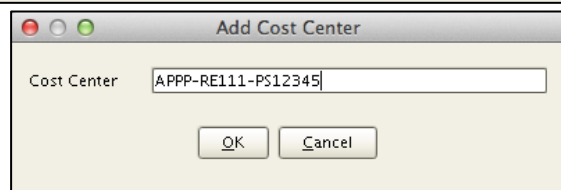
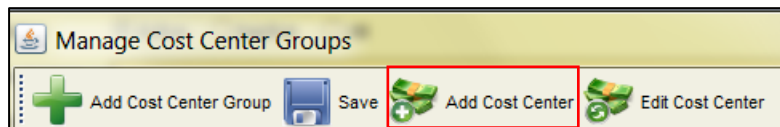
▶ Follow the consistent naming format i.e.

[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

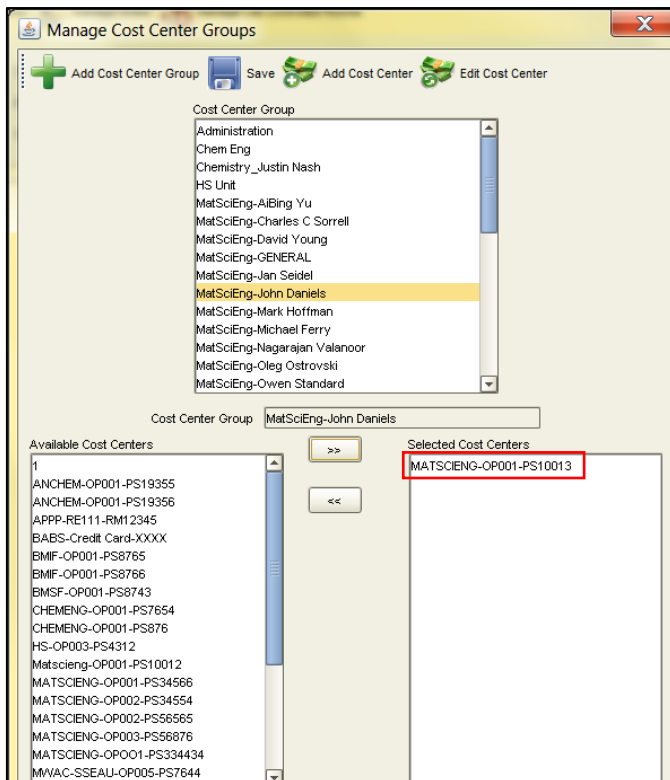
How to create Organisation structure, Cost Centre & Users



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



Manage Cost Center Groups

Cost Center Group

- Administration
- Chem Eng
- Chemistry_Justin Nash
- HS Unit
- MatSciEng-AiBing Yu
- MatSciEng-Charles C Sorrell
- MatSciEng-David Young
- MatSciEng-GENERAL
- MatSciEng-Jan Seidel
- MatSciEng-John Daniels
- MatSciEng-Mark Hoffman
- MatSciEng-Michael Ferry
- MatSciEng-Nagarajan Valanoor
- MatSciEng-Oleg Ostrovski
- MatSciEng-Owren Standard

Cost Center Group: MatSciEng-John Daniels

Available Cost Centers

- 1
- ANCHEM-OP001-PS19355
- ANCHEM-OP001-PS19356
- APPP-RE111-RM12345
- BABS-Credit Card-XXXX
- BMF-OP001-PS8765
- BMF-OP001-PS8766
- BMSF-OP001-PS8743
- CHEMENG-OP001-PS7654
- CHEMENG-OP001-PS876
- HS-OP003-PS4312
- Matscieng-OP001-PS10012
- MATSCIENG-OP001-PS34566
- MATSCIENG-OP002-PS34554
- MATSCIENG-OP002-PS56565
- MATSCIENG-OP003-PS56876
- MATSCIENG-OP001-PS334434
- MWAC-SSEAU-OP005-PS7644

Selected Cost Centers

- MATSCIENG-OP001-PS10013

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



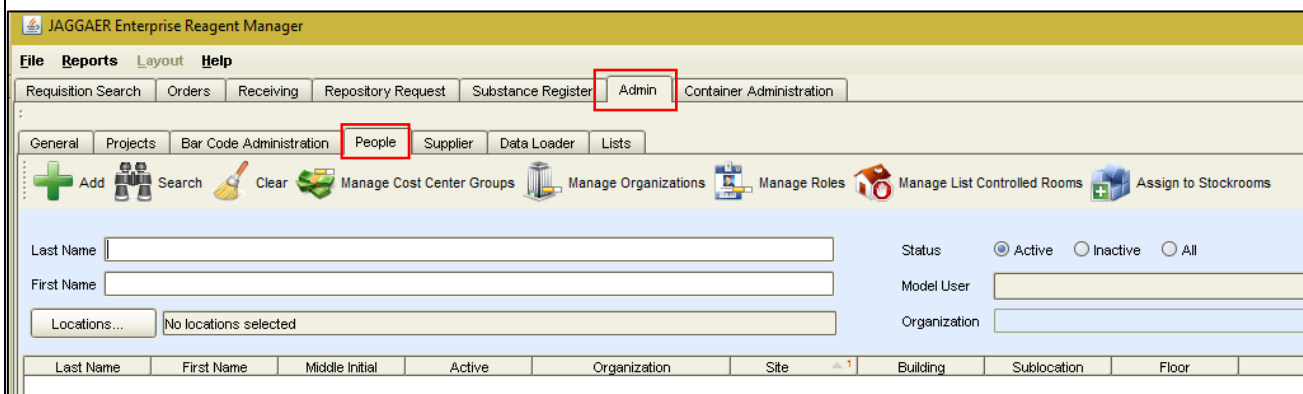







How to create Organisation structure, Cost Centre & Users

JAGGAER Enterprise Reagent Manager

File Reports Layout Help

Requisition Search Orders Receiving Repository Request Substance Register Admin Container Administration

General Projects Bar Code Administration People Supplier Data Loader Lists

 Add
  Search
  Clear
  Manage Cost Center Groups
  Manage Organizations
  Manage Roles
  Manage List Controlled Rooms
  Assign to Stockrooms

Last Name

First Name

Locations... No locations selected


Status Active Inactive All

Model User

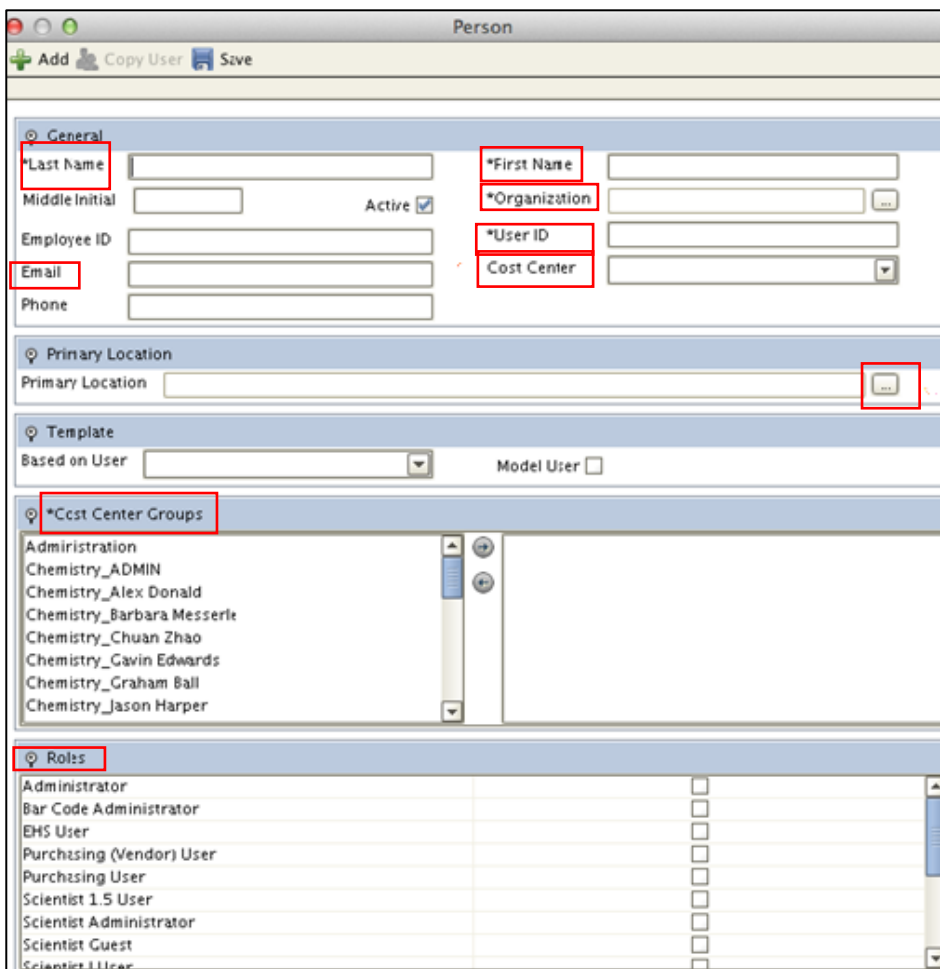
Organization

Last Name	First Name	Middle Initial	Active	Organization	Site	Building	Sublocation	Floor

Step 4: Set up Users

- ▶ Click on the 'Admin' tab, then the 'People' tab then click on the  Add tab
- ▶ This opens up the 'Person' pop up window. Follow the prompts as shown below

How to create Organisation structure, Cost Centre & Users



Person

+ Add Copy User Save

General

*Last Name *First Name

Middle Initial Active *Organization

Employee ID *User ID

Email Cost Center

Phone

Primary Location

Primary Location

Template

Based on User Model User

***Cost Center Groups**

Administration	
Chemistry_ADMIN	
Chemistry_Alex Donald	
Chemistry_Barbara Messerle	
Chemistry_Chuan Zhao	
Chemistry_Gavin Edwards	
Chemistry_Graham Ball	
Chemistry_Jason Harper	

Roles

Administrator	<input type="checkbox"/>
Bar Code Administrator	<input type="checkbox"/>
EHS User	<input type="checkbox"/>
Purchasing (Vendor) User	<input type="checkbox"/>
Purchasing User	<input type="checkbox"/>
Scientist 1.5 User	<input type="checkbox"/>
Scientist Administrator	<input type="checkbox"/>
Scientist Guest	<input type="checkbox"/>
Scientist 1 User	<input type="checkbox"/>

- ▶ 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

