How to set up the Organisation structure, Cost Centres and Users

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

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

1. Click on the Admin tab

   ![Admin Tab Image]

2. Select the People tab

   ![People Tab Image]

3. Select ‘Manage Organisation’

   ![Manage Organisation Image]

4. Click on the sign to open up the Organisation structure

   ![Organisation Sign Image]

The **Organization Tree** follows a specific hierarchy – as per screenshot below:

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

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

7. Then click the Add button.

8. Enter the details in the appropriate format [School]-[FirstName] [LastName].

9. Click OK.

New entry is created.
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**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

3. Enter the name of the new group
   a. Follow the consistent naming format i.e. [School]_[FirstName]_[LastName]
   b. *Note: the use of an underscore ‘_’ between school and name*

4. Repeat steps 2 and 3 until all cost centre groups for the school/centre are created

**Step 3: Set up the Cost Centres**

1. Click on ‘Add Cost Centre’

2. Enter the name of the cost centre

3. 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
4. Finally assign the Cost Centers to a Cost Centre Group by:

- Click on the Cost Centre Group (highlighted)
- Then click on the Cost Centre (highlighted)
- Then Click

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
Step 4: Set up Users

1. 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 labelled below:

2. Enter the Last Name and First Name
3. Select the appropriate Organisation as created in Step 1.
4. For User ID: Enter the person’s zID
5. Enter Email – this is really important for email alerts (use official university email address)
6. Select the person’s Primary Location (click on the to find the person’s main lab room number)
7. Select the appropriate Cost Centre Group created in Step 2.
   i. Search for the Group on the left
   ii. Select it and press the button to add it to the list on the right
   iii. If your selection is incorrect, highlight the entry and press
8. Select the default Cost Centre (account code) to be used for purchasing
9. Select the appropriate Role
   a. Scientist 1 – Search internal inventory and search hosted catalogs but cannot create requisitions
   b. Scientist 2 – As Above plus can create requisitions i.e. senior PhD or PostDoc
   c. Scientist Admin – As Above plus with Admin functions as per this cheatsheet (envisage one or two of such roles per school)
Note: if you have more than one user with the same details (e.g. same physical location, same cost centre group and cost centre then choose ‘Copy User’