How to create Organisation structure, Cost Centre & Users

Creating and Managing Organisation

- Select Menu > People administration > Manage Organizations
- Add organization –
  - Click “Add organization”
  - Type the desired name in the “organization name” field
  - Click “save”
- Rename and Delete Organization:
  - Select the organization
  - To rename: Select the “rename organization”
  - To delete: Select the “delete organization”
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Cost Centre Group Management

Paragraph:

- Select “Manage cost centre group” from “People administration” menu
- Editing existing Cost centre group
  - Search for the desired cost centre. Hint: using wildcard search with school unit name
  - Select the “edit” icon (1) Note: the associate cost centres will be displayed on the left
  - To add a NEW cost centre to cost centre group; type the new cost centre into (2) and click on the “add +” button
  - To add exist cost centre, search using wildcard of department ID in (3), existing cost centre will appear on the right-side and use “+” (5) to add the desired cost centre
- Deleting cost centre from cost centre group
  - Search for the desired cost centre. Hint: using wildcard search with school unit name
  - Select the desired cost centre group, which will display the associated cost centre on the right
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Cost Centre Management

- Click on the “delete” icon (4) of the respective cost centre that needs to be removed

- Select “Manage Cost Centers” under people management
- Activating or de-activating cost centre
  - Search for cost centre by either typing the entire cost centre or use wild card search in the cost centre field (1). The search result to appear on the left table.
  - Select the cost centre for activation/de-activation by ticking (3)
  - Using either the “activate cost centres” or In-activate cost centres” button (2) to activate/deactivate the cost centre
## How to create Organisation structure, Cost Centre & Users

### Searching existing users

Select the “people search” icon or Menu > People Administration > People Search

- **Name:** Search first & last name, email and Z-Id
- **Status:** the selection of all, active and Inactive
- **Location:** Click on the “search” icon to browser primary location
- **Organisation:** select the desired organisation from the drop-down list
- **Roles:** Select the desired roles from the drop-down list

Click “search.”

### Edit/ Change user profile

Click on “edit” button (under the action column) for the user results
To add or edit the following:
- **First & last name**: type
- **Phone number**: type
- **Email**: type
- **User ID**: Z-id
- **Active**: Select Yes/No
- **Location**: Select the blue “search” icon to browse for the desired primary location
- **Organisation**: Select the desired organisation from the drop-down list
- **Cost Centre Group**:
  - Search the cost centre group by typing in the name of the group.
  - Select the “cost centre group” and click on the “add+” button
- **Roles**: Select the desired role from the drop-down list and click on “add+” button
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Chemical Inventory Management

### Adding New Users

1. Click on Menu > People Administration > Create Person or Select the “create person” tile
2. Fill in all the mandatory field *
   - Last & First name
   - Phone number
   - Email
   - User ID: Z-Id
   - Generate Password: select “No.”
   - Location: Select a primary location by clicking on the “search” button
   - Organisation: Select the organisation from the drop-list
   - Cost Centre Group: browse and select the cost centre group by typing the cost centre group name. (hint: an additional cost centre group will need to be added in the edit user window)
   - Roles: Select the role from the drop-down list. (hint: any additional roles will need to be assigned in the edit user window)

3. Click “Save” button (top right)