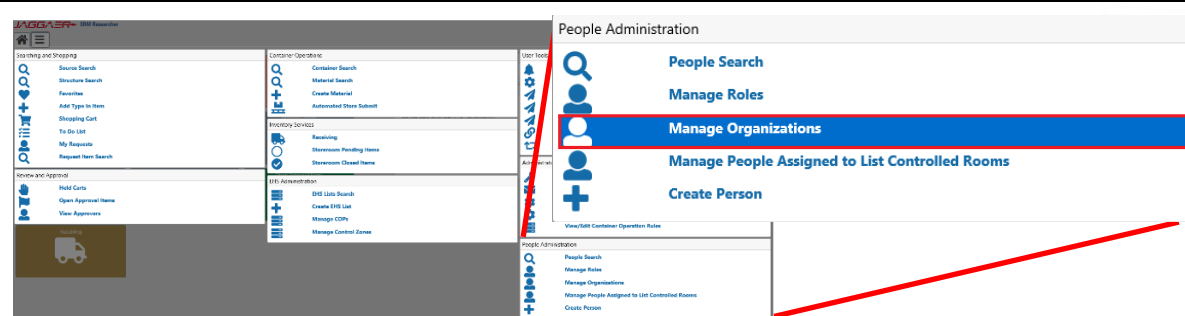
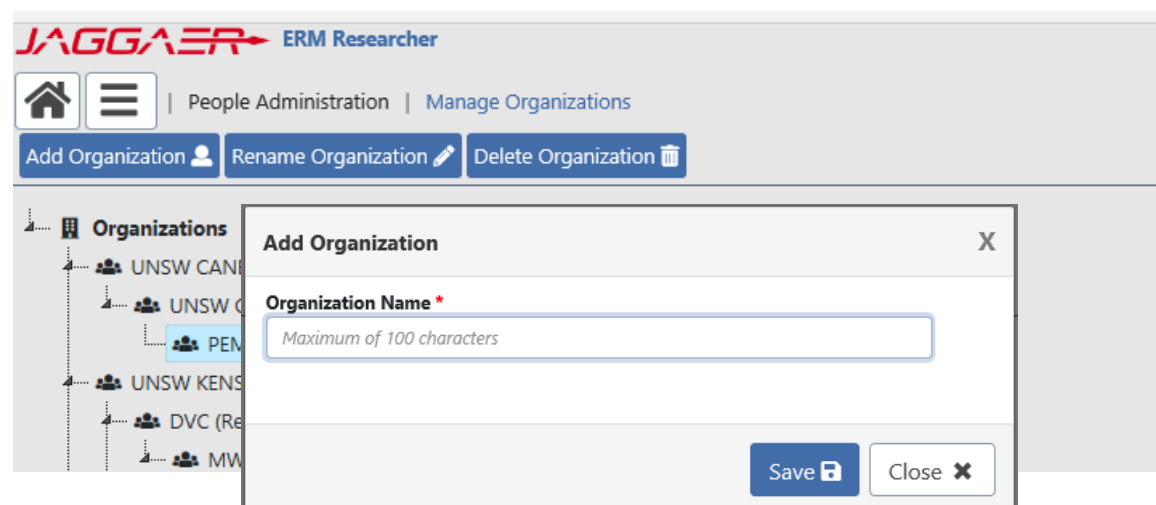


## Creating and Managing Organisation



- ▶ 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”



## Cost Centre Group Management

### People Administration

- People Search
- Manage Roles
- Manage Organizations
- Manage People Assigned to List Controlled Rooms
- Manage People Assigned to Projects
- Create Person
- Manage Cost Centers
- Manage Cost Center Groups**

Cost Center Group  Search

Create New Cost Center Group + Results : 65

Action	Cost Center Group	Action	Cost Centers for Group:
<b>1.</b>	Chemistry-Robert Patterson	<b>4.</b>	CPVE-RE118-RG132555
	Chemistry_Adam Martin		CPVE-RE685-RM09984
	Chemistry_ADMIN		
	Chemistry_Alex Donald		
	Chemistry_Alex Soeriyadi		
	Chemistry_Barbara Messerle		

Back to Manage Cost Center Groups ←

Cost Center  Add Search For Cost Center:  Wild card \* is supp Lookup

Edit Cost Centers for Group Chemistry-Robert Patterson

Action	Cost Center	Action	Cost Center
	CPVE-RE118-RG132555	<b>5.</b>	CHEMSCI-BALL-DUMMY
	CPVE-RE685-RM09984		CHEMSCI-BROPHY-DUMMY

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

## Cost Centre Management

People Administration

- People Search
- Manage Roles
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- Manage People Assigned to Projects
- Create Person
- Manage Cost Centers**
- Manage Cost Center Groups

Cost Centers | People Administration | Manage Cost Centers

Cost Centers \*chemsci\* **1.** Search

Export All Cost Centers Export All Cost Centers and Groups

Selected Cost Centers 0 / 168 **2.** Activate Cost Centers + Inactivate Cost Centers -

<input type="checkbox"/>	Cost Centers	Active	Cost Center Groups for Cost Center: CHEMSCI-OP001-PS02575	# of Cost Centers in
<input checked="" type="checkbox"/>	CHEMSCI-BALL-DUMMY		Chemistry_ADMIN	2
<input type="checkbox"/>	CHEMSCI-BROPHY-DUMMY		Chemistry_Ron Haines	2
<input type="checkbox"/>	CHEMSCI-COLBRAN-DUMMY			
<input type="checkbox"/>	CHEMSCI-COLE-DUMMY			
<input type="checkbox"/>	CHEMSCI-EDWARDS-DUMMY			
<input type="checkbox"/>	CHEMSCI-FC101-PS26811	✓		
<input type="checkbox"/>	CHEMSCI-FC101-PS31094	✓		

- ▶ 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

## Searching existing users

The screenshot shows the 'People Search' interface in the JAGGAER ERM Researcher system. The page title is 'People Administration | People Search'. The search form includes the following fields:

- Name:** A text input field with the placeholder 'Name or Email ...'.
- Status:** A dropdown menu currently set to 'All'.
- Location:** A text input field with a search icon and a trash icon.
- Organization Name:** A dropdown menu with the option 'No Primary Location Set'.
- Project:** A dropdown menu.
- Role:** A dropdown menu.
- Created:** Two date input fields.

At the bottom of the form, there are two buttons: 'Search' and 'Reset Criteria'.

- ▶ 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

The screenshot shows the user search results table in the JAGGAER ERM Researcher system. The table has the following columns:

Action	Last Name	First Name	Middle Initial	Status
	Tuong	Trung		Active

The 'Action' column for the user 'Tuong' contains an edit icon, which is highlighted with a red box in the original image.

- ▶ Click on “edit” button (under the action column) for the user results

**JAGBA ERM Researcher** | People Administration | Edit Person

Created By: Martina Lavin on 27/11/13 2:31 AM  
Last Modified By: Trung Tuong on 25/03/19 4:09 PM

**Last Name \***: Tuong | **First Name \***: Trung | **Middle Initial**:  
**Phone #**: 93855923 | **Email**: n.t.tuong@unsw.edu.au | **Employee ID**: X6313093411207  
**User ID \***: z3130934 | **Active**: Yes/No

**Location**: MWAC>F10>G>G01  
**Organization Name**: UNSW KENSINGTON>DVC (Research)>MWAC>BMIF

**Cost Center Group**: Administration, Chemistry\_OPERATING, BEES-David Eldridge, Test UAT  
**Role**: Administrator, Bar Code Administrator, Cost Centre Approver, BHS User, ERM Purchasing Reports, Purchasing (Vendor) User, Purchasing User, Radiation Approver, Receiver, Scientist 1.5 User, Scientist Administrator, Scientist Guest, Scientist I User, Scientist II User, Stockroom Administrator, Storeroom User

**Additional organizations that user can approve**: UNSW CANBERRA>UNSW Canberra

- ▶ 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

## Adding New Users

The screenshot shows the 'Create Person' form in the JAGGAER ERM Researcher system. The form is titled 'People Administration | Create Person' and has a 'Save' button at the top left. The form fields are as follows:

- Last Name \***: Text input field (Maximum of 100 characters)
- First Name \***: Text input field (Maximum of 100 characters)
- Middle Initial**: Text input field
- Phone #**: Text input field (Maximum of 22 characters)
- Email**: Text input field (Maximum of 100 characters)
- Employee ID**: Text input field (Maximum of 32 characters)
- User ID \***: Text input field (Maximum of 32 characters)
- Active**: Radio buttons for 'Yes' and 'No'
- Generate Password**: Radio buttons for 'Yes' and 'No'
- Location**: Dropdown menu with search and refresh icons
- Organization Name**: Dropdown menu
- Cost Center Group \***: Text input field with a person icon
- Role**: Dropdown menu

- ▶ Click on Menu >People Administration > Create Person or Select the “create person” tile
- ▶ 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)
- ▶ Click “Save” button (top right)