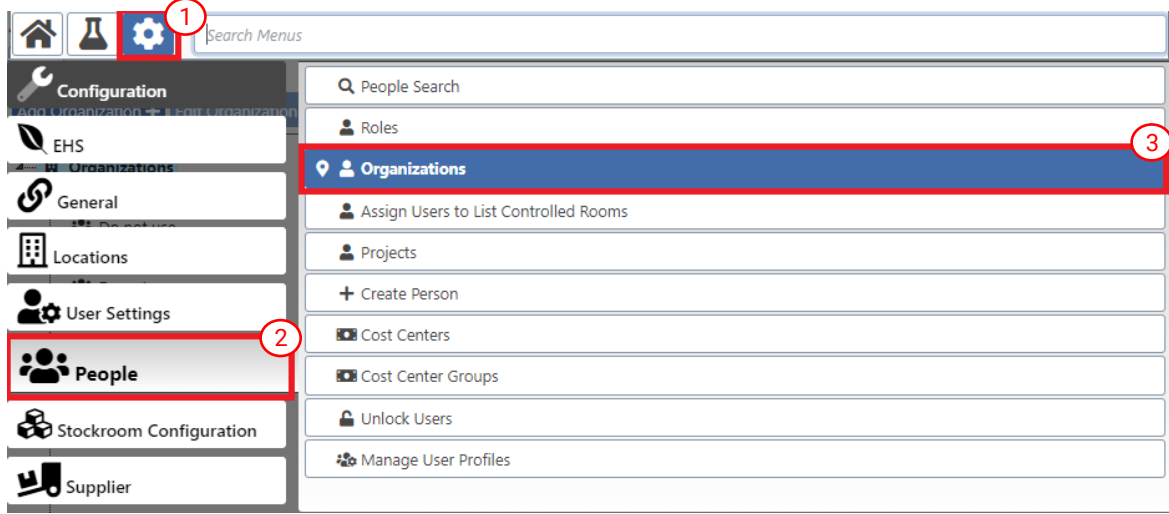
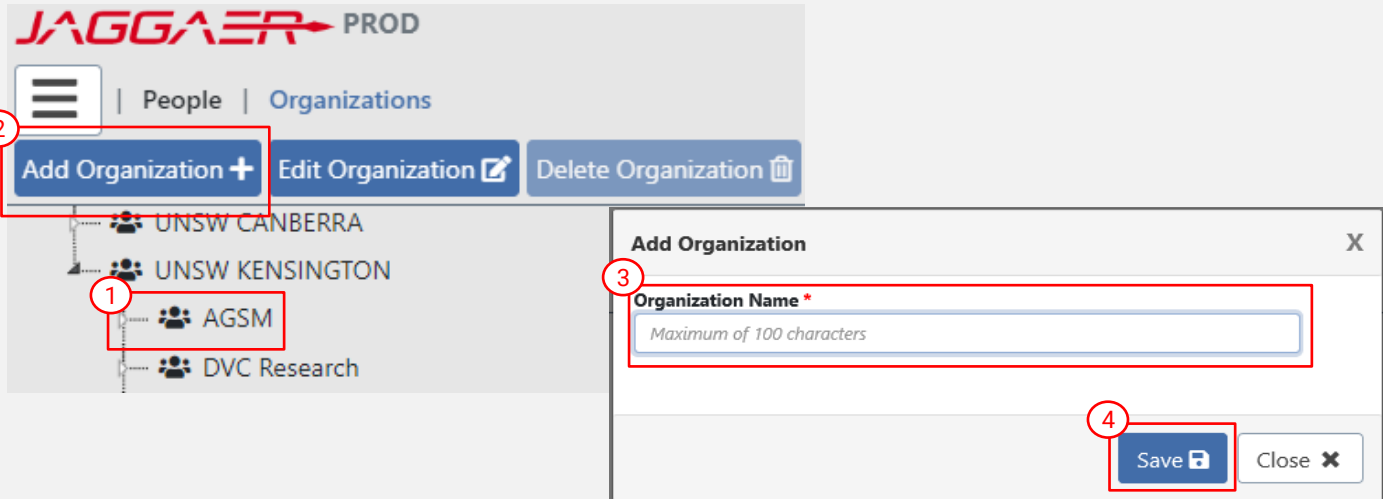


## Contents

1.	Create and Manage Organisation in Jaggaer	2
2.	Create and Manage Cost Centre in Jaggaer	4
a)	Manage cost centre/cost centre group of a specific user profile: Add, Edit, Remove	4
b)	Manage Cost Centre Group with no specific user profile available: Create, Edit	8
3.	Add New Users in Jaggaer	10

# 1. Create and Manage Organisation in Jaggaer

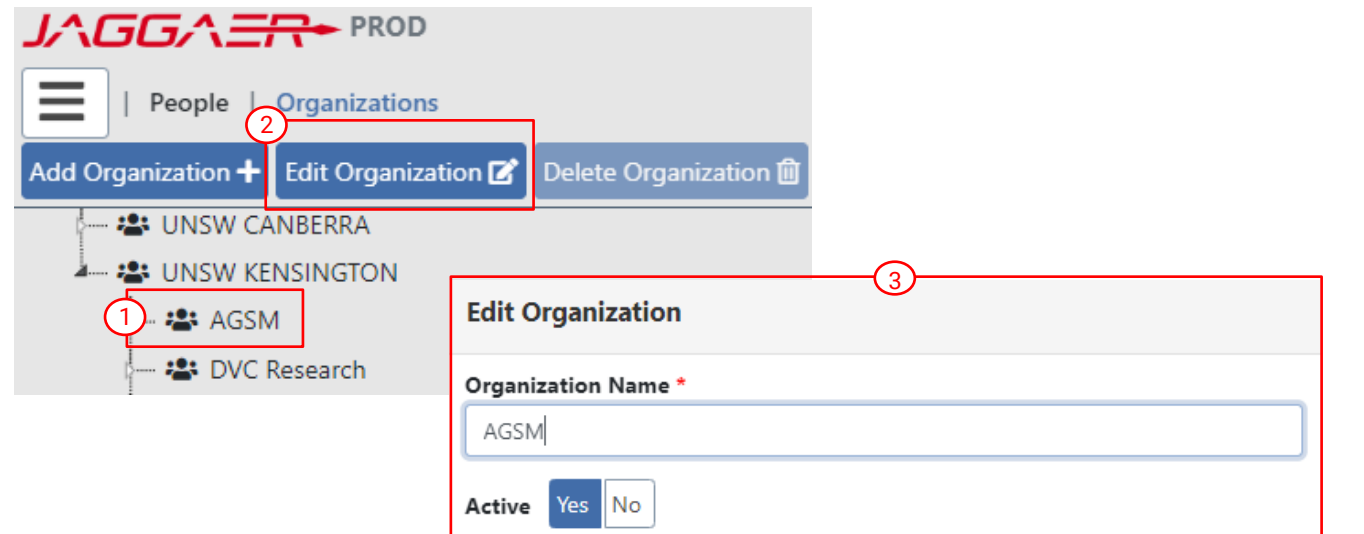
Step	Screenshot
<p>1. In the Home page, go to <b>Menu</b> -&gt; <b>People</b> -&gt; <b>Organizations</b> to open Organisation page.</p>	
<p><b>Add Organisation</b></p> <ol style="list-style-type: none"> <li>① Choose the organisation under which you would like to add a new organisation.</li> <li>② Click <b>Add Organization</b>.</li> <li>③ Enter the desired name in the <b>Organization Name</b> field.</li> <li>④ Click <b>Save</b>.</li> </ol>	

## Edit Organisation

- ① Select the organisation that you would like to edit
- ② Click **Edit Organization**
- ③ Rename the Organization Name or make it Inactive -> click **Save**

### Note:

- You cannot delete any organisations.
- You can inactivate an organisation, but please note that if a high-level organisation is **Inactive**, all sub-level organisations will be **Inactive**.
- Make sure that all **Active** users within an organization are reassigned before inactivating the organization.



The screenshot displays the JAGGAER PROD interface. At the top, there is a navigation bar with a menu icon, 'People', and 'Organizations'. Below this are three buttons: 'Add Organization +', 'Edit Organization' (highlighted with a red box and a circled '2'), and 'Delete Organization'. A list of organizations is shown below: UNSW CANBERRA, UNSW KENSINGTON, AGSM (highlighted with a red box and a circled '1'), and DVC Research. An 'Edit Organization' modal window is open, showing the 'Organization Name' field with 'AGSM' entered and 'Active' radio buttons for 'Yes' and 'No'. The modal is highlighted with a red box and a circled '3'.



## 2. Create and Manage Cost Centre in Jaggaer

### Definition:

- **Cost Centre** refers to the account from which orders are charged.
- **Cost Centre Group** is a group of accounts managed by the same organisation. Users who have permission to approve for a Cost Centre Group can approve for **all** orders associated with any of the cost centres within it.

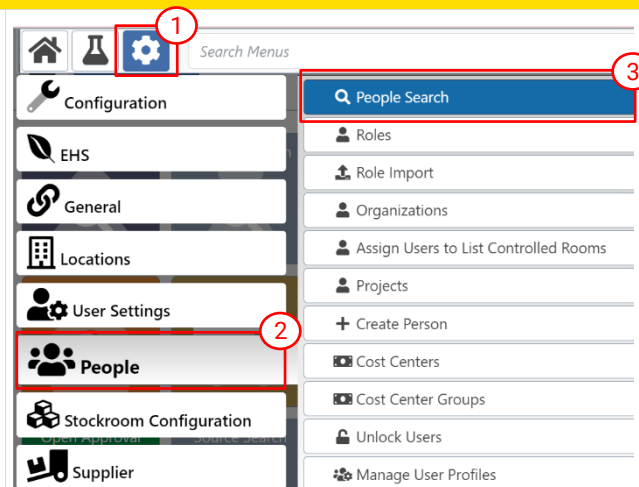
### Note:

- You will need to know the **Cost Centre Group** that the new cost centre belongs to.
- **Cost Centre** must be in the correct format of **DepartmentID-FundID-ProjectID** (no whitespace in between) and be active in Finance system (NSF).

### a) Manage cost centre/cost centre group of a specific user profile: Add, Edit, Remove

#### Search existing user profiles

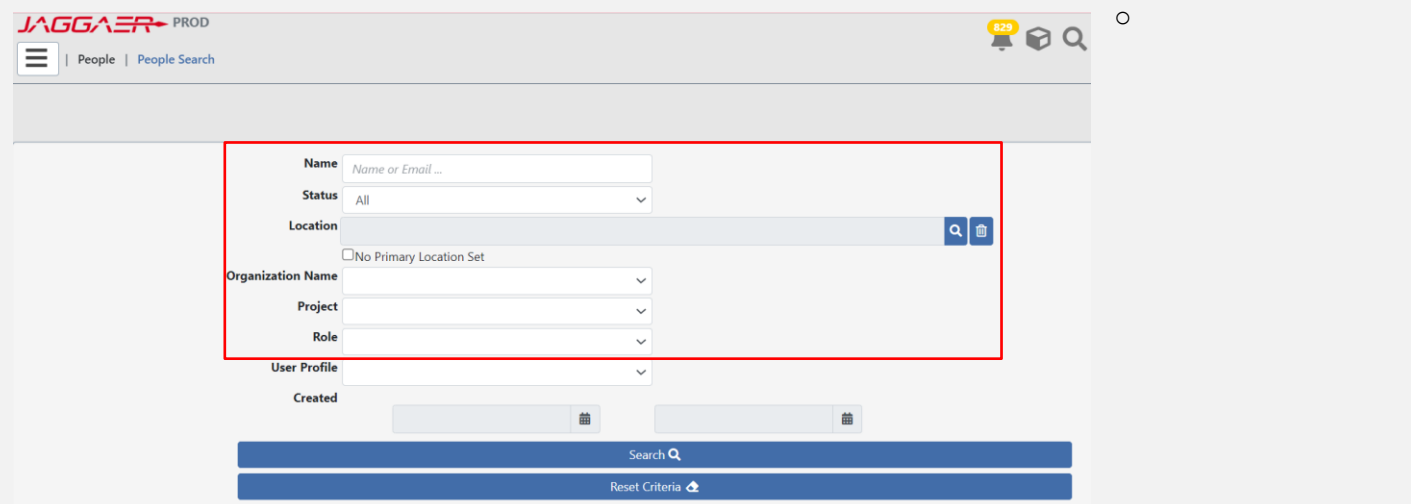
1. In the Home page, go to **Menu** -> **People** -> **People Search** to search for user profiles.



## 2. Search for an existing user profile

In **People Search** page, search for an existing user profile:

- **Name:** Search by first name & last name, email, zID
- **Status:** All, Active or Inactive
- **Location:** Click on the Search icon to browse primary location
- **Organization Name:** Select the desired organisation
- **Role:** Select the desired roles
- Click **Search**



JAGGAER PROD

People | People Search

Name

Status

Location

No Primary Location Set

Organization Name

Project

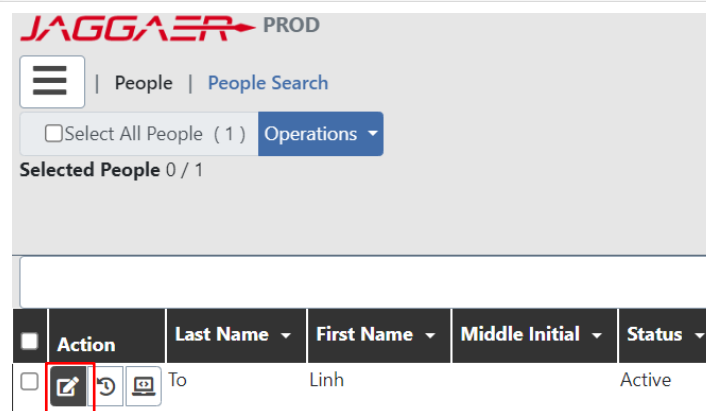
Role

User Profile

Created

## 3. Click on **Edit** button (under **Action** column)

- When **Edit Person** page opens, scroll down to find **Cost Centre Group** section.
- Select one of the below actions to manage Cost Centre Group/Cost Centre.



JAGGAER PROD

People | People Search

Select All People ( 1 )

Selected People 0 / 1

<input type="checkbox"/>	Action	Last Name	First Name	Middle Initial	Status
<input type="checkbox"/>	<input type="button" value="Edit"/> <input type="button" value="Refresh"/> <input type="button" value="Delete"/>	To	Linh		Active

## Manage cost centre groups of an existing user profile

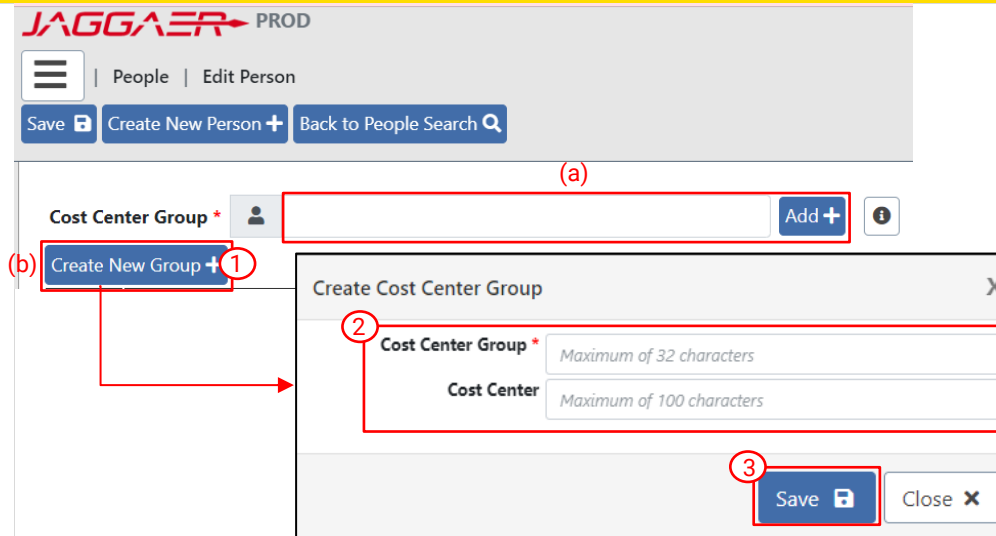
### Add a cost centre group to user profile:

(a) To add an **existing** cost centre group:

- Type cost centre group name and select the correct one
- Click **Add**.


(b) To create a **new** cost centre group:

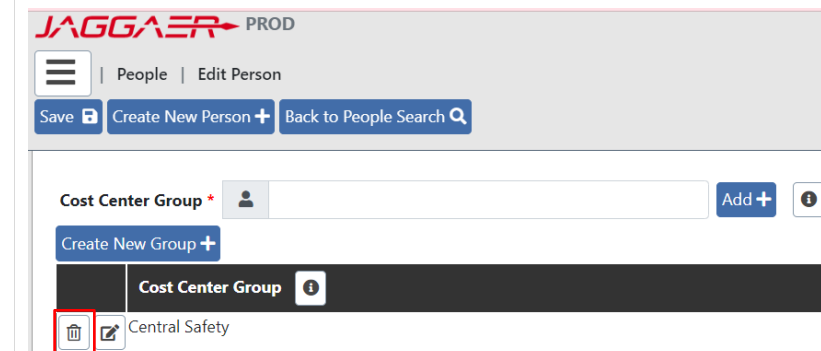
- 1 Click **Create New Group**. A new window will appear.
- 2 Enter the new **Cost Center Group** name and new **Cost Center**
- 3 Click **Save** to add to user profile.



The screenshot shows the 'Edit Person' page in the JAGGAER PROD system. At the top, there are navigation options: 'People' and 'Edit Person', along with 'Save', 'Create New Person +', and 'Back to People Search' buttons. Below this, there is a 'Cost Center Group \*' field with an 'Add +' button. A red box labeled '(a)' highlights this field. Below the field is a 'Create New Group +' button, which is highlighted with a red box and a circled '1' labeled '(b)'. An arrow points from this button to a 'Create Cost Center Group' modal window. This modal window has two input fields: 'Cost Center Group \*' with a note 'Maximum of 32 characters' and 'Cost Center' with a note 'Maximum of 100 characters'. A red box labeled '2' highlights these fields. At the bottom of the modal, there is a 'Save' button (highlighted with a red box and a circled '3') and a 'Close' button.

### Remove a cost centre group from user profile


- Click on  icon to remove a cost centre group from user profile.

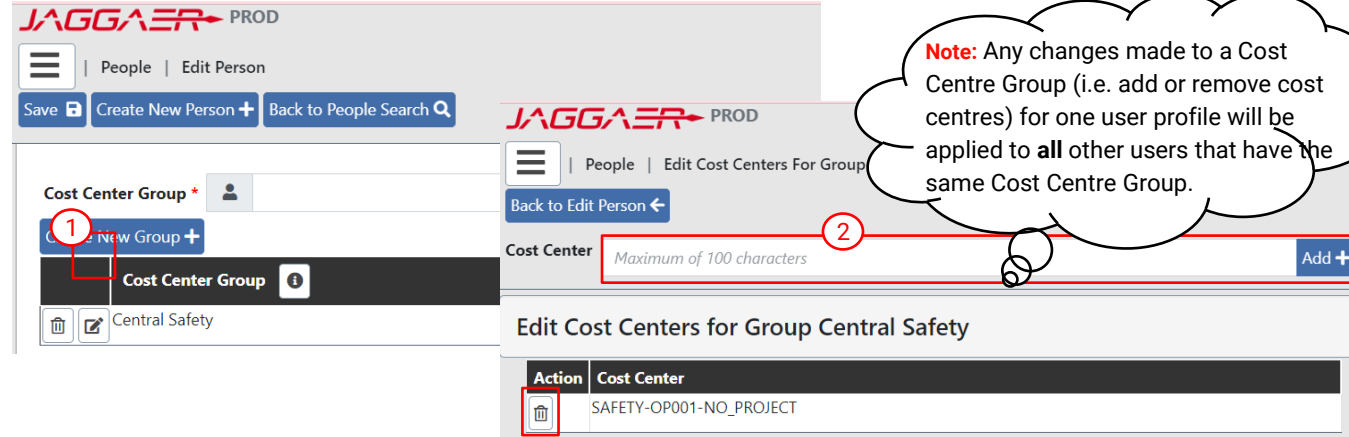


The screenshot shows the 'Edit Person' page in the JAGGAER PROD system. It features the same navigation and buttons as the previous screenshot. Below the 'Cost Center Group \*' field and 'Create New Group +' button, there is a list of existing cost center groups. The first group is 'Central Safety'. A red box highlights the trash icon next to this group name, indicating the removal action.

## Manage cost centre of an existing user profile

### Add/Remove a cost centre from an existing Cost Centre Group:

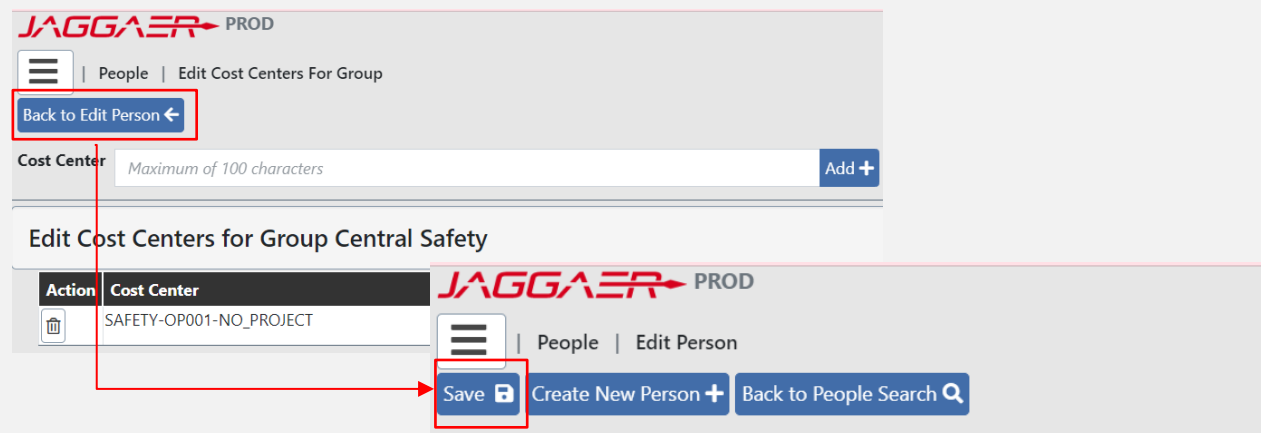
- 1 Click **Edit** button next to the Cost Centre Group name
- 2
  - (a) **Add:** Enter the new Cost Centre code in the format of Department ID-FundID-ProjectID -> click **Add**.
  - (b) **Remove:** Click on  to remove the cost centre.



**Note:** Any changes made to a Cost Centre Group (i.e. add or remove cost centres) for one user profile will be applied to **all** other users that have the same Cost Centre Group.

### 5. Save changes

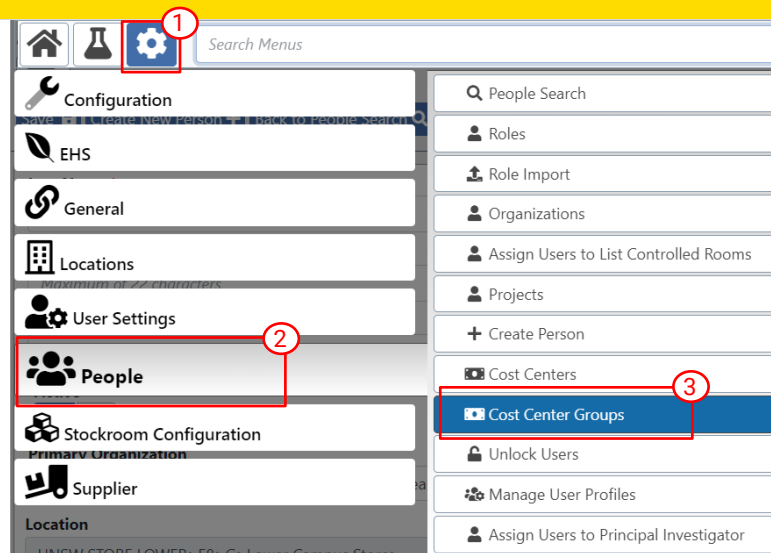
Once completed editing user profile, click **Back to Edit Person** -> click **Save**.



## b) Manage Cost Centre Group with no specific user profile available: Create, Edit

### Create or Edit Cost Centre Group



1. In the Home page, go to **Menu** -> **People** -> **People Search** to search for user profiles.



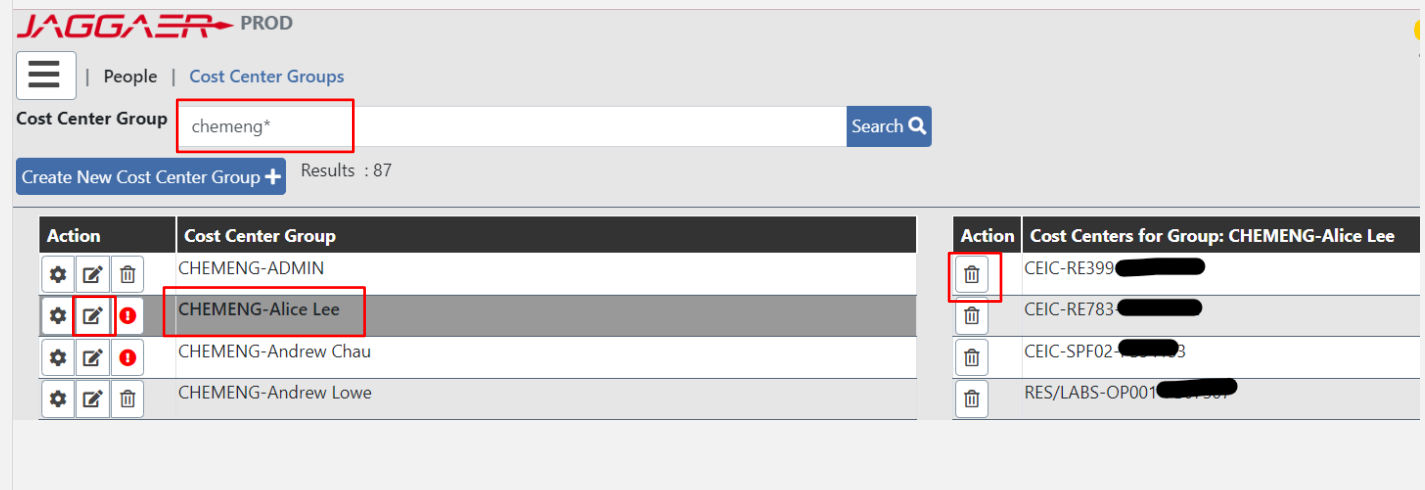
### Edit an existing cost centre group















- Type the entire cost centre group name or use wild card search (\*).

The left table shows a list of cost centre group. The right table shows cost centres of a selected group.

- To **rename** a cost centre group, click 
- To **delete** a cost centre in a group: Click  icon

**Note:** Must not delete a cost centre group if multiple cost centres exist.

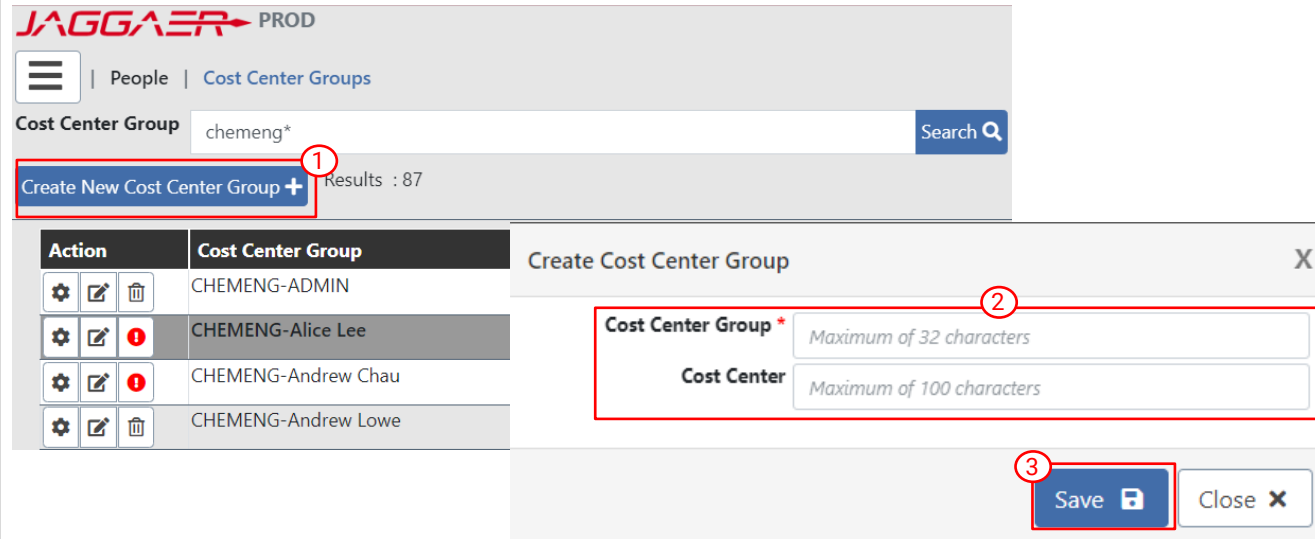


Action	Cost Center Group	Action	Cost Centers for Group: CHEMENG-Alice Lee
 	CHEMENG-ADMIN		CEIC-RE399-██████████
  	<b>CHEMENG-Alice Lee</b>		CEIC-RE783-██████████
  	CHEMENG-Andrew Chau		CEIC-SPF02-██████████
 	CHEMENG-Andrew Lowe		RES/LABS-OP001-██████████



### Create a new cost centre group

- ① Click **Create New Cost Center Group**. A popup window will appear.
- ② Enter the new **Cost Center Group** name and new **Cost Center**
- ③ Click **Save**.















JAGGAER PROD

People | Cost Center Groups

Cost Center Group chemeng\* Search

Create New Cost Center Group + Results : 87

Action	Cost Center Group
  	CHEMENG-ADMIN
  	CHEMENG-Alice Lee
  	CHEMENG-Andrew Chau
  	CHEMENG-Andrew Lowe

Create Cost Center Group X

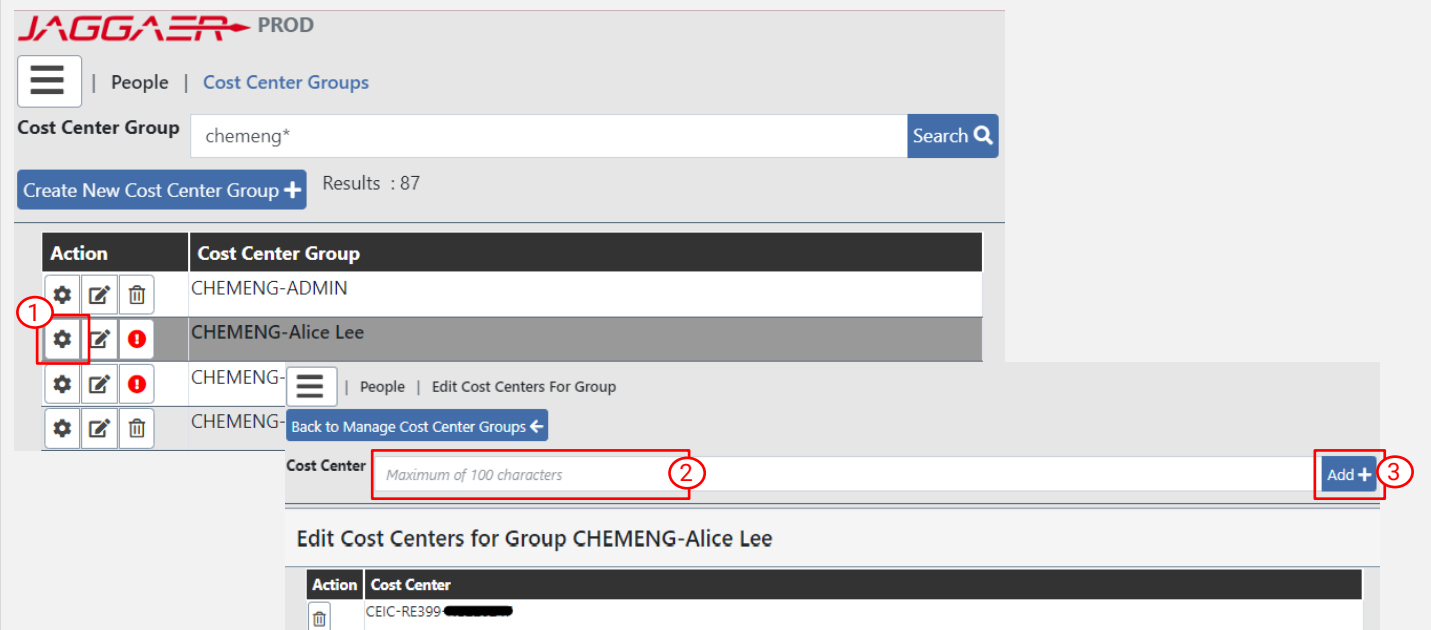
Cost Center Group \* Maximum of 32 characters

Cost Center Maximum of 100 characters

Save Save Close X

### Add a new cost centre to an existing cost centre group

- ① Click **Setting** icon under Action column → **Edit Cost Centers For Group** page will appear.
- ② Enter a new cost centre that you wish to add to the group
- ③ Click **Add**.















JAGGAER PROD

People | Cost Center Groups

Cost Center Group chemeng\* Search

Create New Cost Center Group + Results : 87


Action	Cost Center Group
  	CHEMENG-ADMIN
  	CHEMENG-Alice Lee
  	CHEMENG-
  	CHEMENG-

People | Edit Cost Centers For Group

Back to Manage Cost Center Groups

Cost Center Maximum of 100 characters Add +

Edit Cost Centers for Group CHEMENG-Alice Lee

Action	Cost Center
	CEIC-RE399



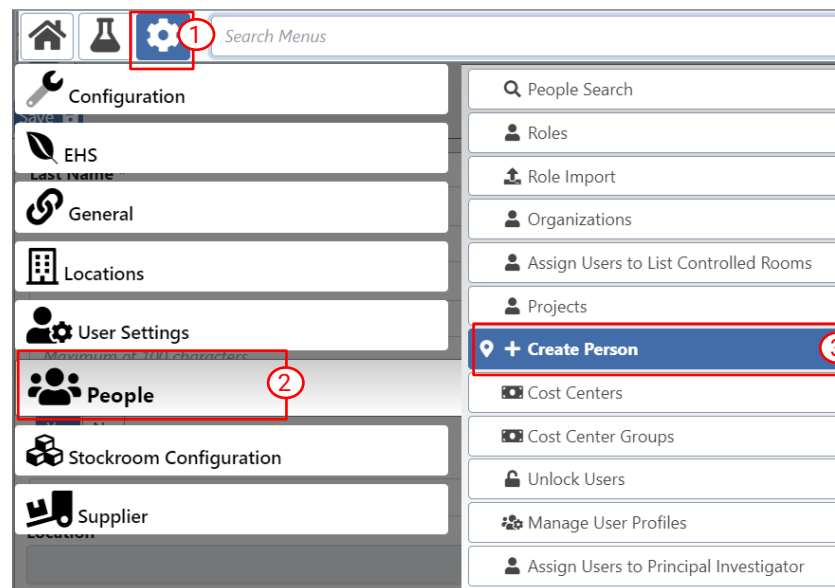
## 3. Add New Users in Jaggaer

**Prerequisite:** Details required to create a user profile in Jaggaer:

- First name, last name
- zID, email
- Supervisor: To decide which sub-location they belong to.
- Location: Receiving location for users' orders (e.g. BABS>E26>LG>LG021)
- Organization Name: Must be assigned to the lowest level of the organisation chart (e.g. Faculty of Medicine>CCIA>CCIA-ETMO)
- Cost Centre Group: Group that includes the Cost Centre that orders are charged from.
- Role: Please refer to [Jaggaer Roles and Permissions](#) guide for detailed information on each system role.

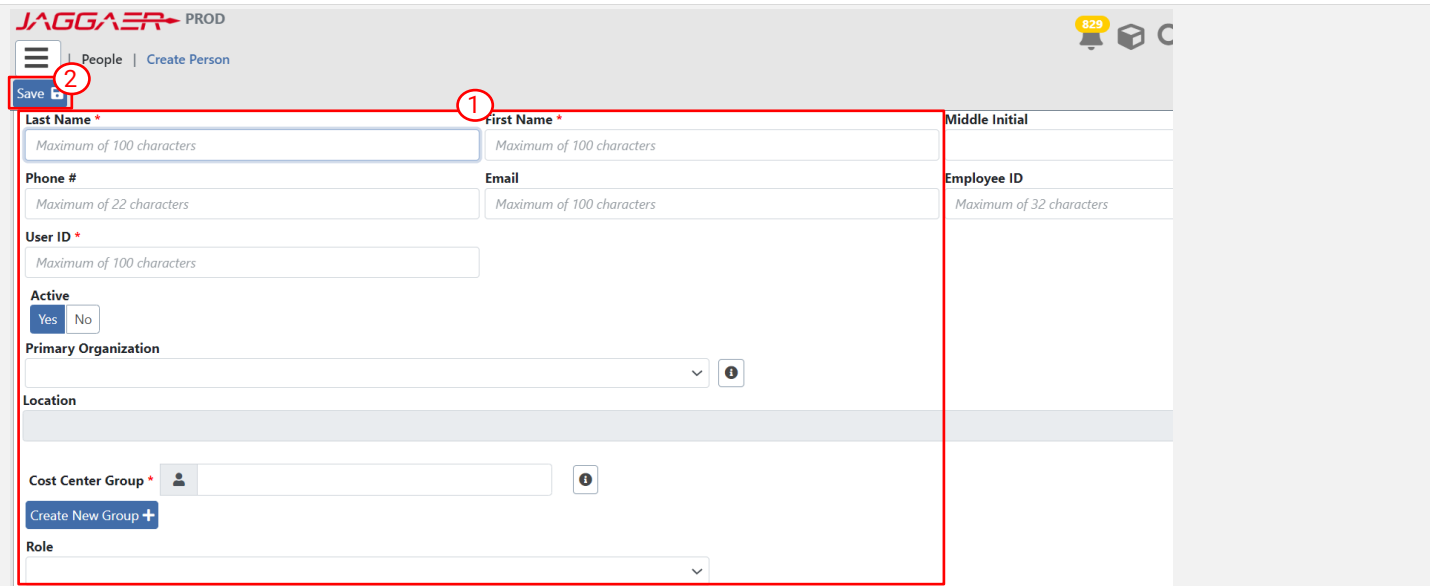
### Create New Users

1. In the Home page, go to **Menu** -> **People** -> **Create Person** to create a new user profile.



## 2. Create Person

- ① Fill in all compulsory fields \*
  - **Last Name**
  - **First Name**
  - **Email**
  - **User ID:** zID (with the 'z')
  - **Primary Organisation**
  - **Location:** Click on **Search** icon to search for receiving location.
  - **Cost Center Group:** Type cost centre group name to search and select.
  - **Role:** Click on the dropdown list to assign a role.
- ② Click **Save** to open **Edit Person** page for further updates (e.g. add multiple cost centre groups, multiple roles)



The screenshot shows the 'Create Person' form in the JAGGAER PROD system. The form is titled 'People | Create Person'. A red box highlights the main form area, and a 'Save' button is circled in red. The form includes the following fields:

- Last Name \*** (Maximum of 100 characters)
- First Name \*** (Maximum of 100 characters)
- Middle Initial**
- Phone #** (Maximum of 22 characters)
- Email** (Maximum of 100 characters)
- Employee ID** (Maximum of 32 characters)
- User ID \*** (Maximum of 100 characters)
- Active** (Yes/No buttons)
- Primary Organization** (Dropdown menu)
- Location** (Searchable dropdown menu)
- Cost Center Group \*** (Searchable dropdown menu with 'Create New Group +' button)
- Role** (Dropdown menu)

**Note:** If you create a profile and get the error **User Id must be unique**, it means this user has an existing profile. In that case, please contact [jaggaercim@unsw.edu.au](mailto:jaggaercim@unsw.edu.au) for support.

### Note:

If the new user has Approver roles (i.e. Cost Centre Approver, EHS User):

- Find **Organizations for which the user can approve** section
- Search for the organisation from the dropdown list
- Click **Add** to add into **Approval Organisations** list.



The screenshot shows the 'Organizations for which the user can approve' section. It includes a dropdown menu with 'ASGM' selected and an 'Add +' button. Below the dropdown is a section titled 'Approval Organizations'.