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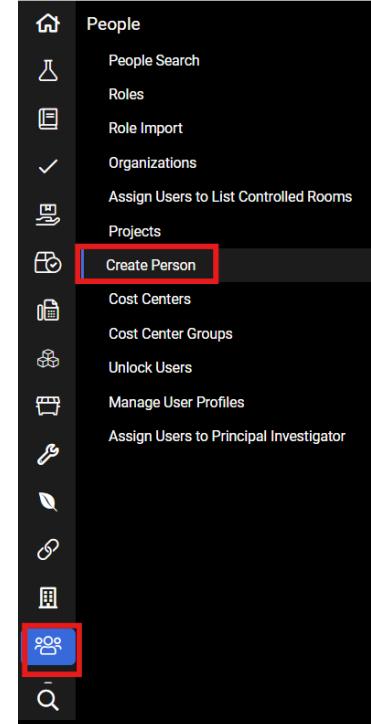
1. Create a New User in Jaggaer

Details required to create a new user profile in Jaggaer:

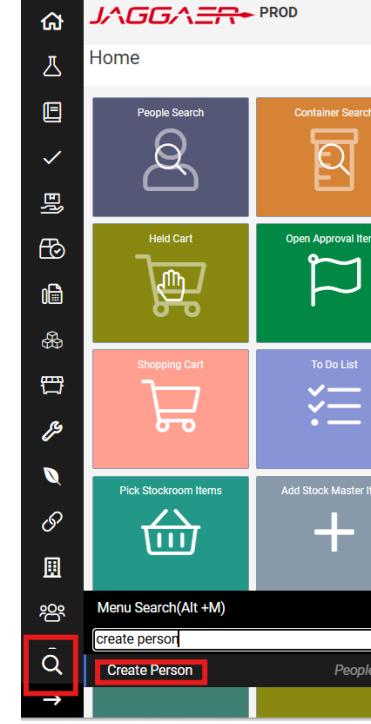
- First name, last name
- zID, email
- Supervisor
- Location: Default delivery location for users' orders (e.g. BABS>E26>LG>LG021 Receiving Location)
- Primary Organisation: Organisation structure varies by area but generally follows this hierarchy: Faculty > School/Institute > Research Group (if any) (e.g. Faculty of Medicine>CCIA>CCIA-ETMO)
- Cost Centre Group: The group that includes the Cost Centre to which orders are charged
- Role: Please refer to [Jaggaer Roles and Permissions](#) guide for more details

Create a new user profile

1. In the Home page, click **People** icon > **Create Person** to create a new user profile.



Or



2. Create Person

① Fill in all compulsory fields *

- **Last Name, First Name**
- **Email**
- **User ID: UNSW zID (with the 'z')**
- **Primary Organization:** Select one at the lowest level of the hierarchy (e.g. Faculty of Medicine>CCIA>CCIA-ETMO)
- **Location:** Click on **Search** icon to search for delivery location: School>Building >Floor>Room
- **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)

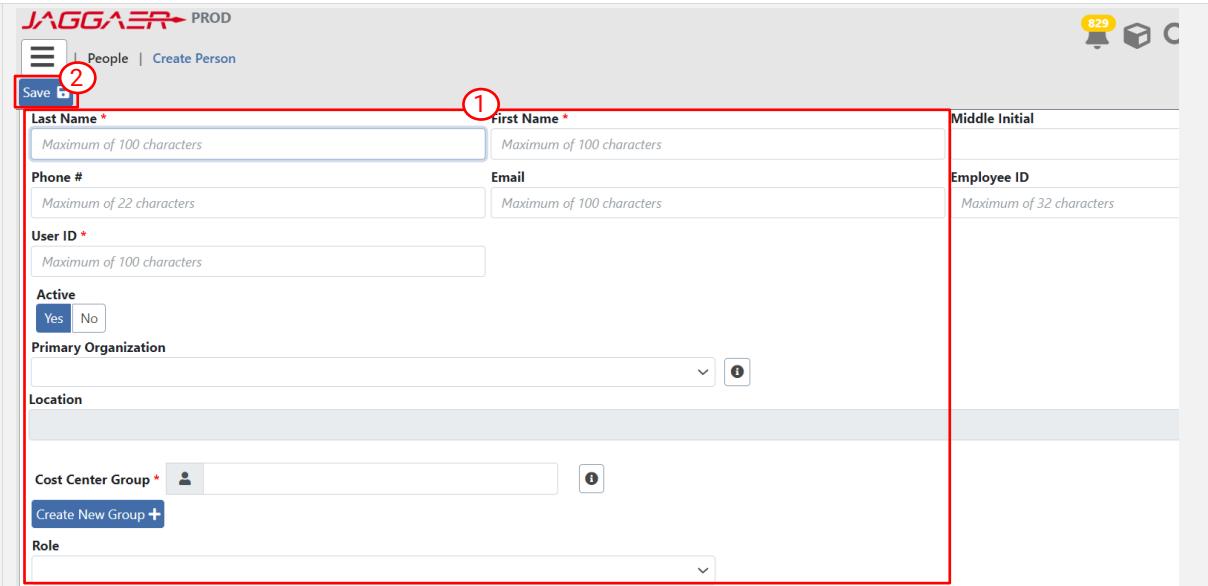
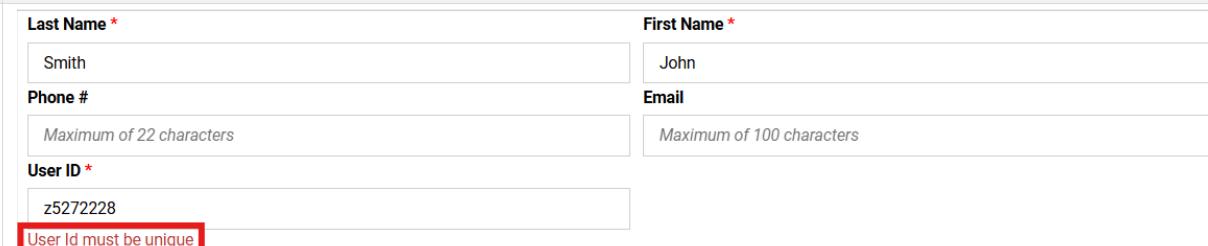
Note: If you get the error 'User Id must be unique', it means this user has an existing profile.

In that case, please contact jaggaercim@unsw.edu.au for support.

Note: Approval Organisation list

For users with one or more Approver roles (i.e. Cost Centre Approver and/or EHS User), ensure the relevant organisation is added to their approval list

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


Once an approval organisation is added, the user can complete cost and/or safety approvals for any orders submitted from this organisation.

Why this matters: If this step is not completed, the user will not be able to approve any orders, even if they have the required role permission.



UNSW
SYDNEY

Manage User Profile, Cost Centre, and Organisation in Jaggaer

JAGGAER

2. Manage Cost Centre/Cost Centre Group in Jaggaer

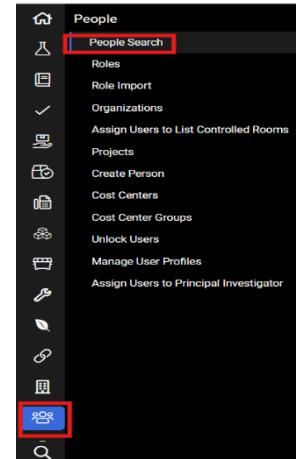
- **Cost Centre**: a project or fund code from which orders are charged. Cost Centre must follow the exact format of **DepartmentID-FundID-ProjectID**.
- **Cost Centre Group**: a group of cost centres managed by the same research group. Users with access to a Cost Centre Group can charge orders to any cost centres within that group.

a) Update Cost Centre/Cost Centre Group for a User

Edit an existing user profile

1. Search for a user profile

- In the **Home** page, go to **People** icon -> **People Search**.
- In **People Search** page, search for a user profile using name/zID



Or



2. Edit an existing user profile

- Click **Edit** button
- Scroll down to find **Cost Centre Group** section.
- Select one of the below actions to manage Cost Centre Group/Cost Centre.

Update cost centre group for a user

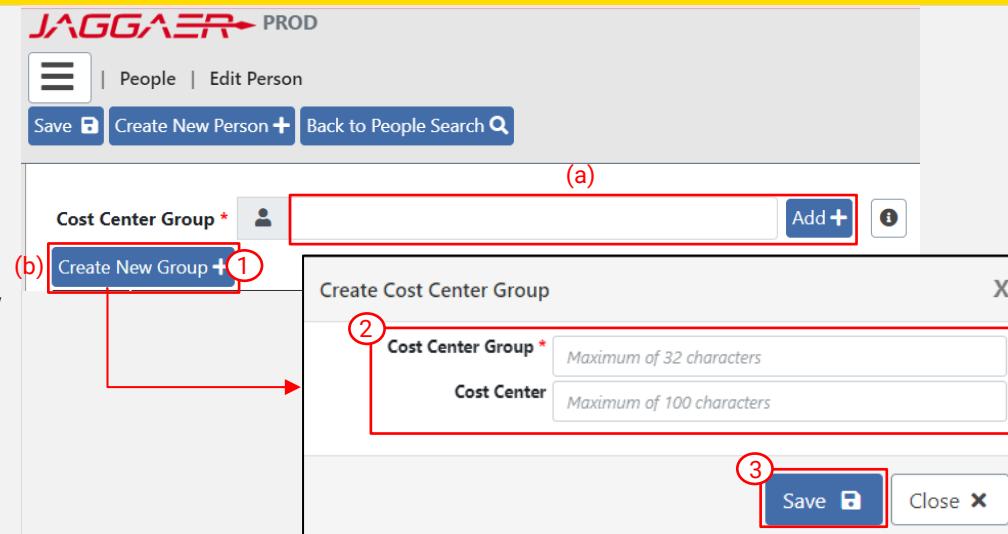
Add a cost centre group to user profile:

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

- Search and select a new Cost Centre Group
- Click **Add**.

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

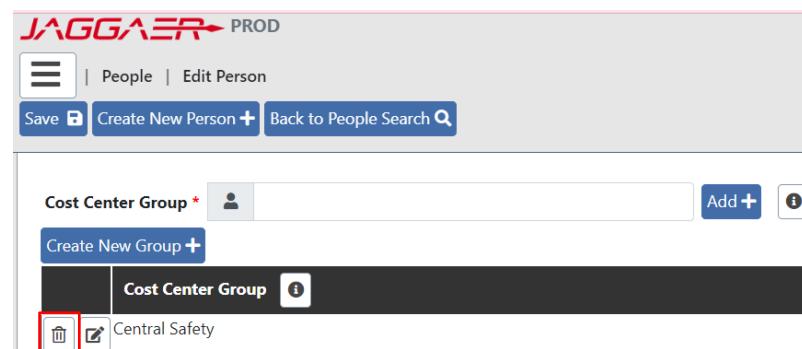
- Click **Create New Group**. A new window will appear.
- Enter the new **Cost Center Group** name and new **Cost Center**
- Click **Save** to add to user profile.



Note: Users with access to a Cost Centre Group can charge orders with any cost centre within the group; hence, be mindful when adding a group to a user profile.

Remove a cost centre group from user profile

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

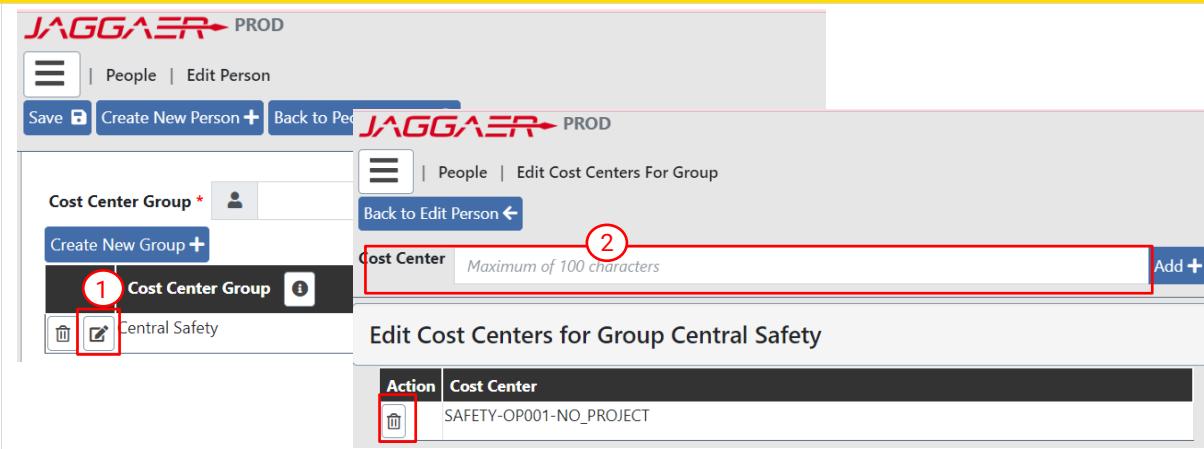


Update cost centre for a user

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

Note: Any changes made to a Cost Centre Group (i.e. add or remove cost centres) will be applied to all users having the same Cost Centre Group.

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



JAGGAER PROD

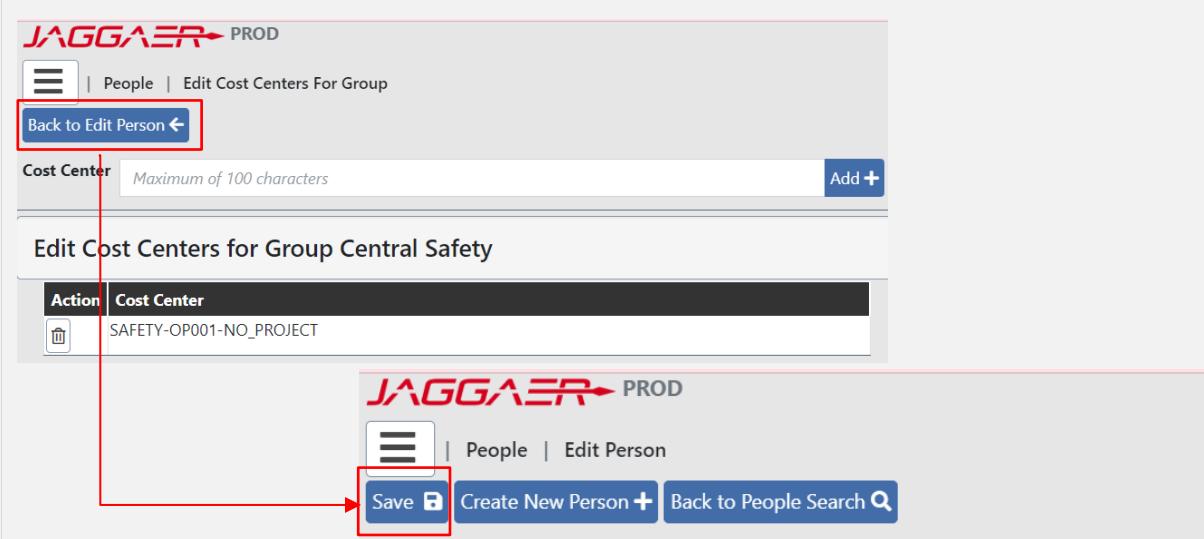
Cost Center Group *

Cost Center Group **Central Safety**

Cost Center **SAFETY-OP001-NO_PROJECT**

Save changes

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



JAGGAER PROD

Cost Center

Cost Center **SAFETY-OP001-NO_PROJECT**

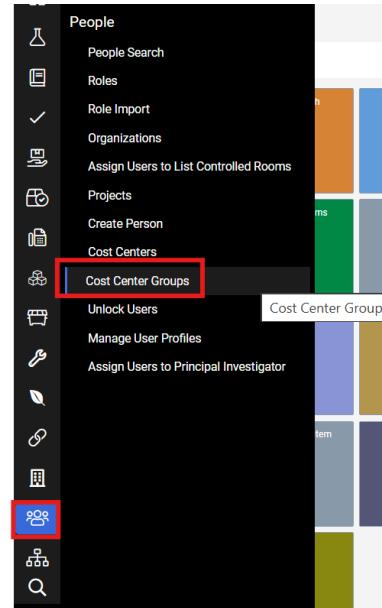
JAGGAER PROD

Save  Create New Person  Back to People Search 

b) Manage Cost Centre/Cost Centre Group (System-Level)

Create or Edit Cost Centre Group

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



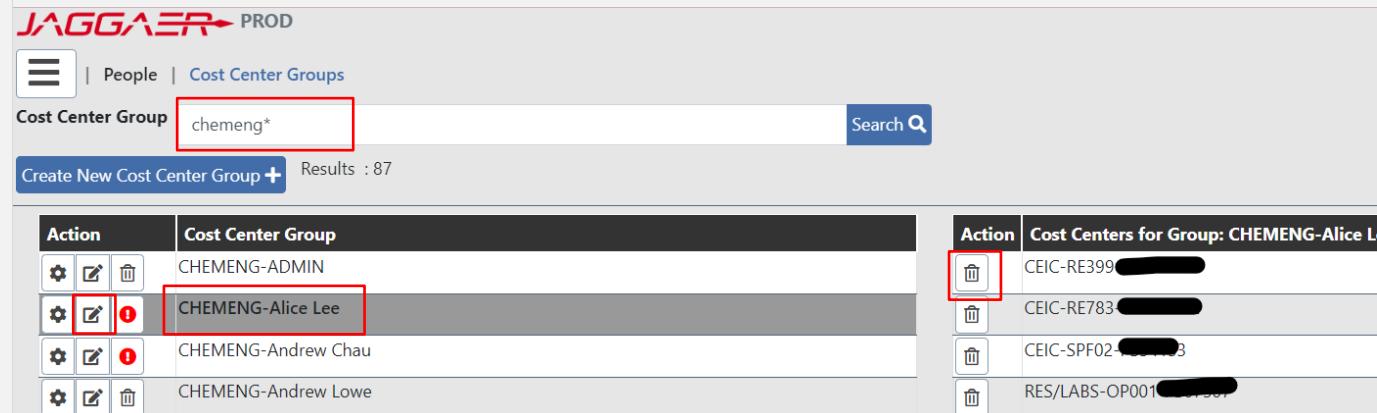
Edit an existing cost centre group

- Type the group name or use wild card search (*).

The left table shows a list of matching groups. 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 .

Note: You cannot delete a group if multiple cost centres exist.

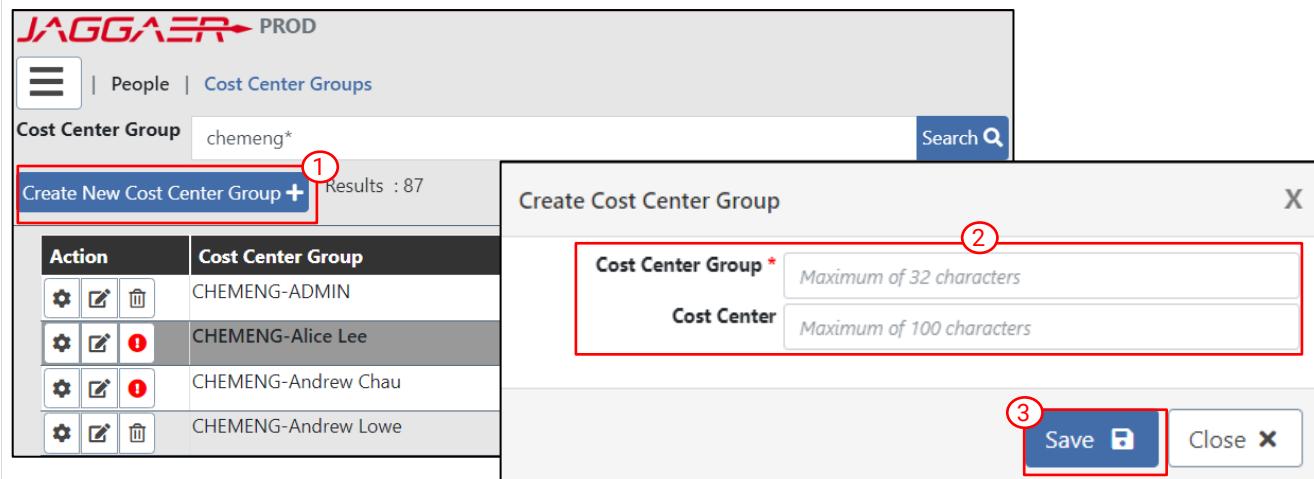


Action	Cost Center Group
	CHEMENG-ADMIN
	CHEMENG-Alice Lee
	CHEMENG-Andrew Chau
	CHEMENG-Andrew Lowe

Action	Cost Centers for Group: CHEMENG-Alice L
	CEIC-RE399
	CEIC-RE783
	CEIC-SPF02
	RES/LABS-OP001

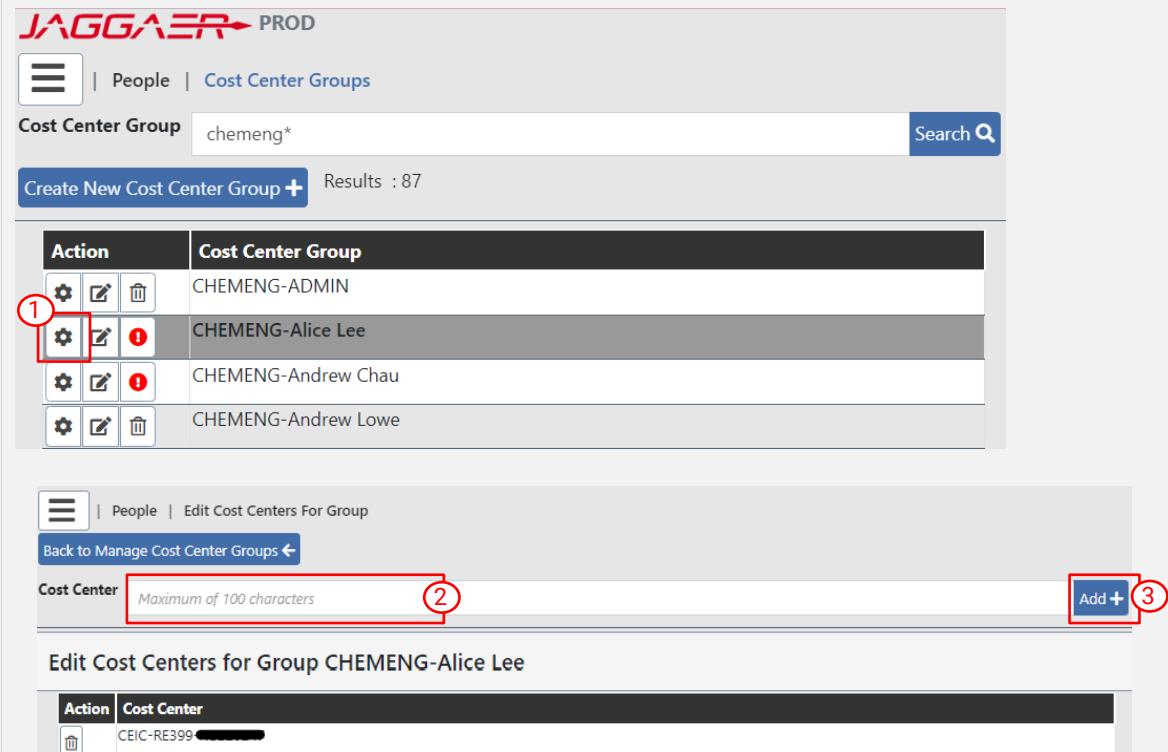
Create a new cost centre group

- 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**.

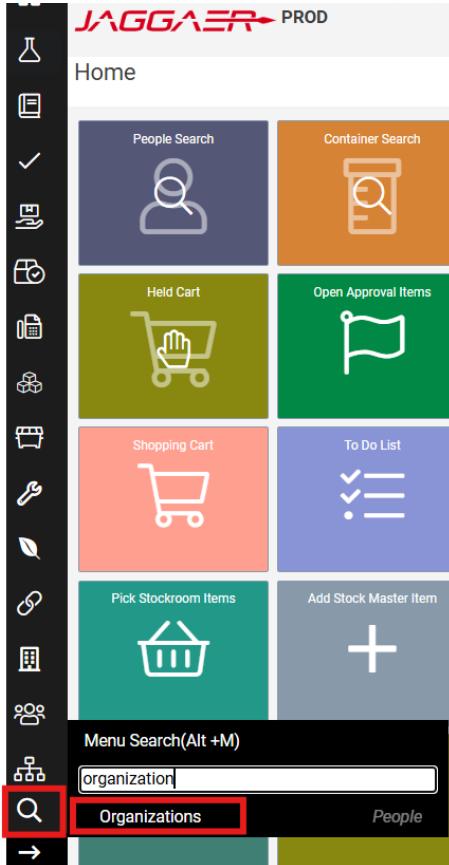


Add a new cost centre to an existing cost centre group

- ① Click **Setting** icon under Action column → **Edit Cost Centers For Group** page will appear.
- ② Enter a new cost centre with the exact format of **DepartmentID-FundID-ProjectID**
- ③ Click **Add**.

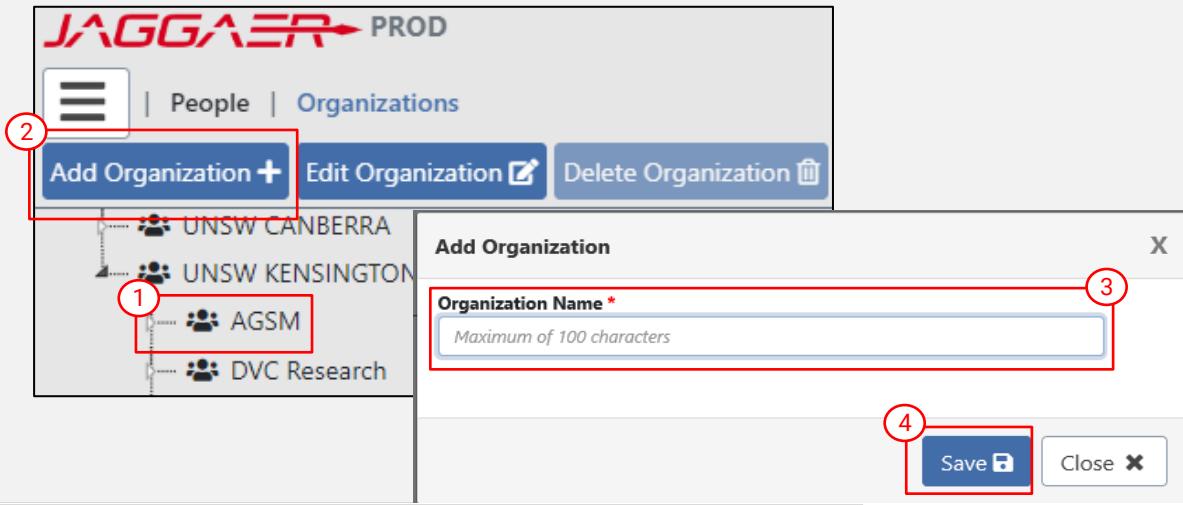


3. Manage Organisation in Jaggaer

Step	Screenshot
1. In the Home page, go to People icon -> Organizations to open Organization page.	<div style="display: flex; justify-content: space-around;"> <div style="text-align: center;">  <p>People</p> <ul style="list-style-type: none"> People Search Roles Role Import Organizations Assign Users to List Controlled Rooms Projects Create Person Cost Centers Cost Center Groups Unlock Users Manage User Profiles Assign Users to Principal Investigator </div> <div style="text-align: center;"> <p>or</p>  <p>JAGGAER PROD</p> <p>Home</p> <p>People Search</p> <p>Container Search</p> <p>Held Cart</p> <p>Open Approval Items</p> <p>Shopping Cart</p> <p>To Do List</p> <p>Pick Stockroom Items</p> <p>Add Stock Master Item</p> <p>Menu Search(Alt +M)</p> <p>organization</p> <p>Organizations</p> <p>People</p> </div> </div>

Add Organisation

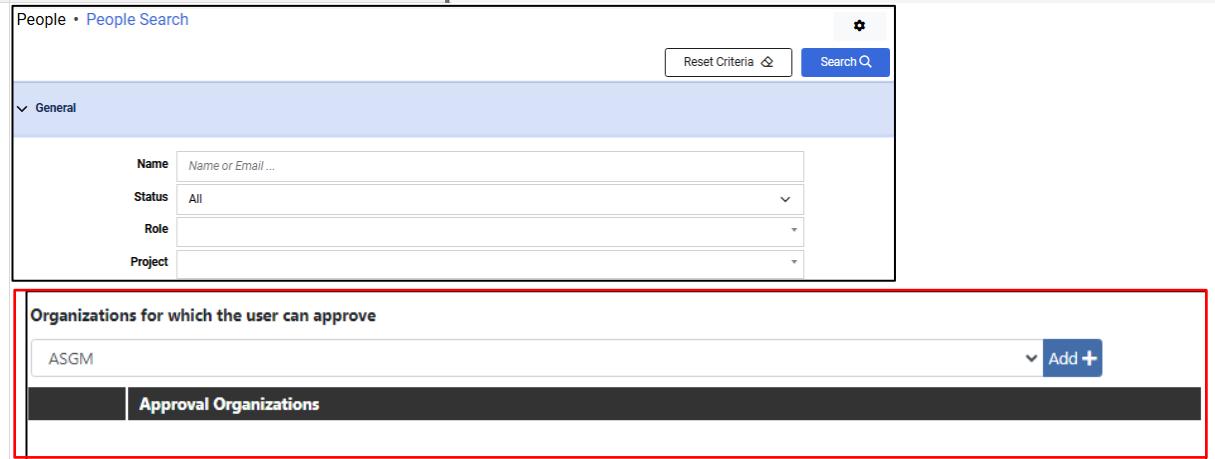
- ① Choose the organisation under which you would like to add a new organisation
- ② Click **Add Organization**
- ③ Enter **Organization Name** field
- ④ Click **Save**.



Note: For each new organisation, **at least one user** with Cost Center Approver and/or EHS User role must be assigned to this organisation.

To assign an approver to a new organisation:

- Go to **People Search** → Search for the nominated approver by name/zID
- Locate the **Organizations for which the user can approve** section
- Search for the organisation using dropdown list
- Click **Add** to add into **Approval Organisations** list
- Click **Save**.



Once assigned, this user will be able to complete cost and/or safety approvals for orders associated with this organisation, provided they have the relevant permissions (Cost Center Approver and/or EHS User role).

Why this matters: If no approvers are assigned to an organisation, orders from this organisation will not progress for approval.

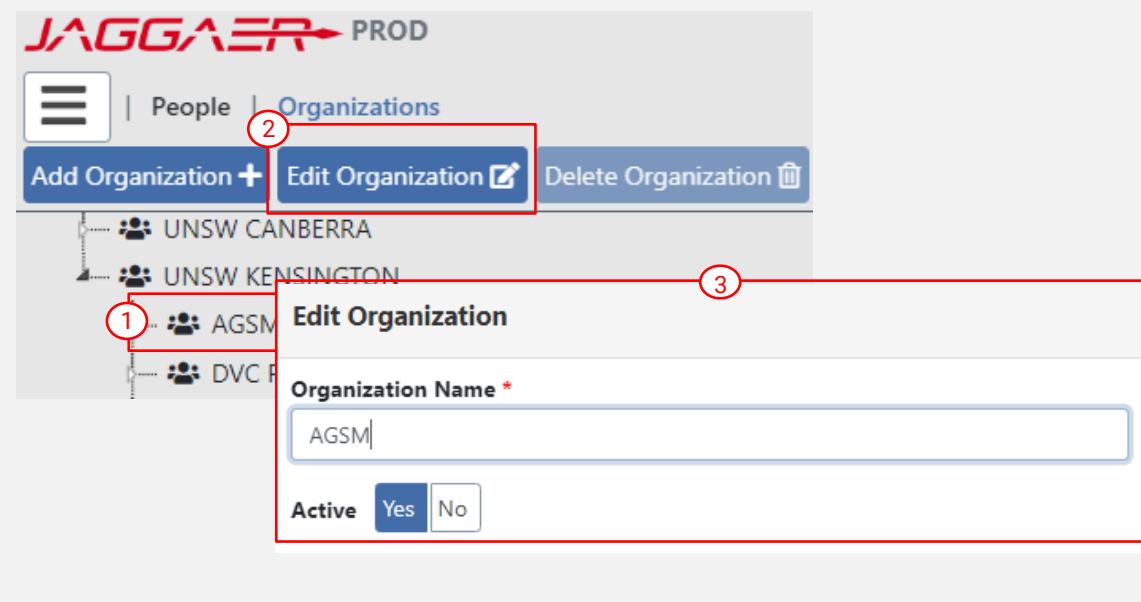
Edit Organisation

- 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 deactivate 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 organisation are reassigned before deactivating the organisation.



The screenshot shows the Jaggaer PROD interface for managing organisations. On the left, a tree view shows 'UNSW CANBERRA' and 'UNSW KENSINGTON'. Under 'UNSW CANBERRA', 'AGSM' is highlighted with a red circle and the number 1. On the right, a navigation bar has 'Edit Organization' highlighted with a red box and the number 2. A modal window titled 'Edit Organization' is open, showing the 'Organization Name' field containing 'AGSM' and the 'Active' dropdown set to 'Yes' (highlighted with a red box and the number 3). The 'Delete Organization' button in the navigation bar is also visible.