

## Contents

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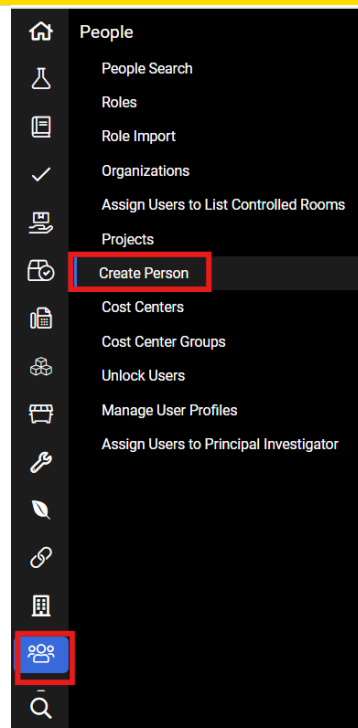
# 1. Create a New User in Jaggaer

Details required to create a new user profile in Jaggaer:

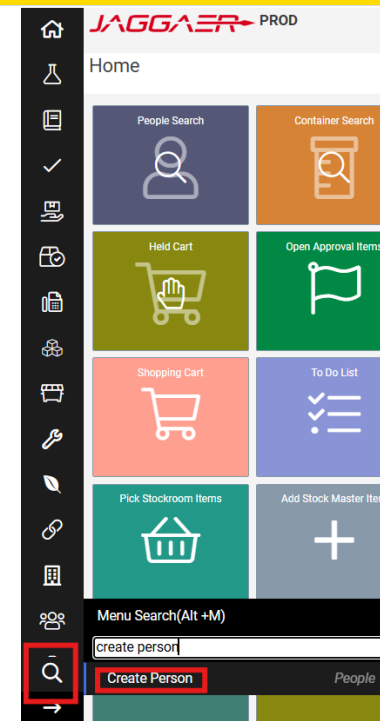
- First name, last name
- zID, email
- Supervisor
- Location: Default delivery location for users' orders (e.g. BABS>E26>LG>LG021 Receiving Location)
- Primary Organisation: Organisation structure varies by area by generally follow this hierarchy: Faculty > School/Institute > Research Group (if any) (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

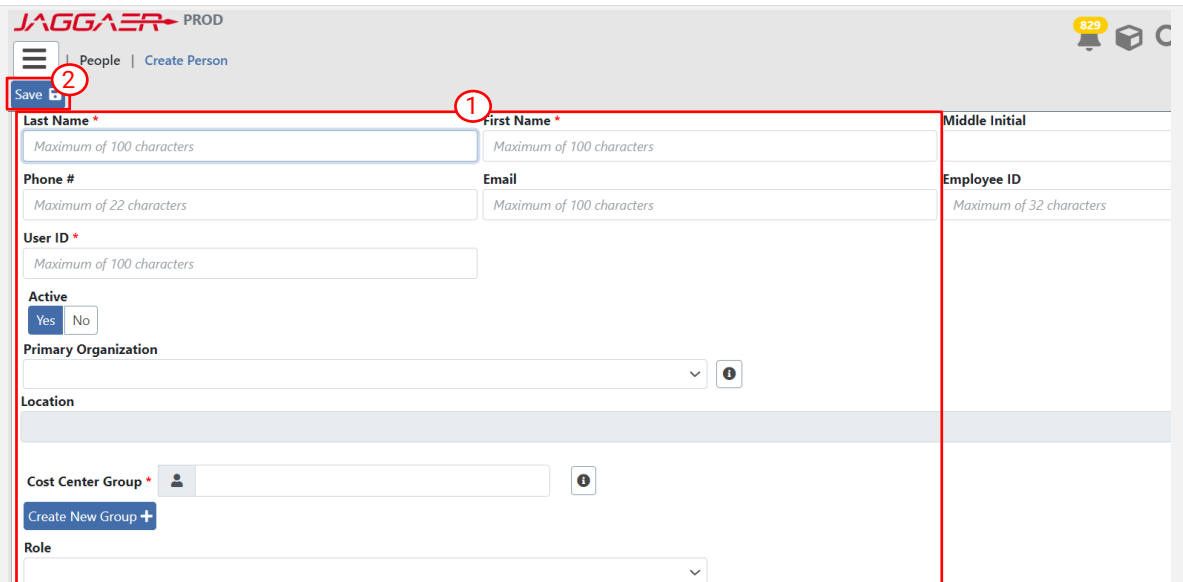
- ① Fill in all compulsory fields \*
  - **Last Name, First Name**
  - **Email**
  - **User ID:** UNSW zID (with the 'z')
  - **Primary Organization:** Select one at the lowest level of the hierarchy (e.g. Faculty of Medicine>CCIA>CCIA-ETMO)
  - **Location:** Click on **Search** icon to search for delivery 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)

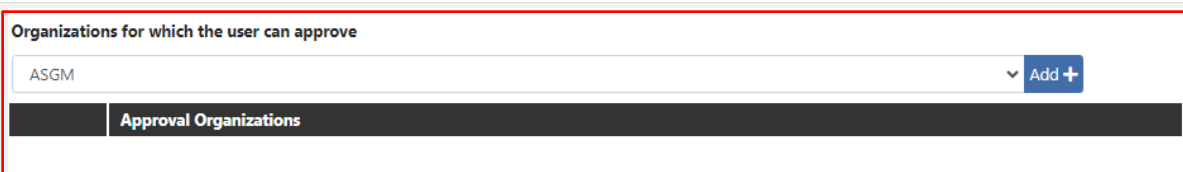
**Note:** If you get the error 'User Id must be unique', it means this user has an existing profile.  
In that case, please contact [jaggaercim@unsw.edu.au](mailto:jaggaercim@unsw.edu.au) for support.

### **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.

## 2. Manage Cost Centre/Cost Centre Group in Jaggaer

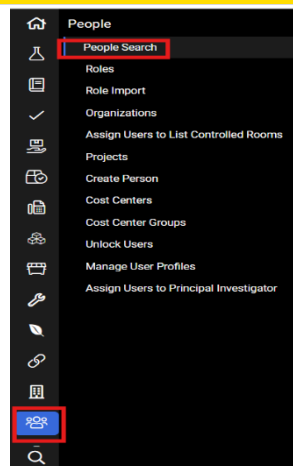
- **Cost Centre:** a project or fund code from which orders are charged. Cost Centre must follow the exact format of **DepartmentID-FundID-ProjectID**.
- **Cost Centre Group:** a group of cost centres managed by the same research group. Users with access to a Cost Centre Group can charge orders to any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

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

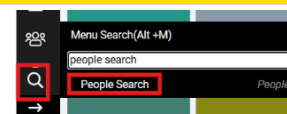
#### Edit an existing user profile

##### 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



People • People Search

Reset Criteria  Search 

General

Name

Status

Role


Project

##### 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.

JAGGAER PROD

People | People Search

☐ Select All People ( 1 ) Operations 

Selected People 0 / 1

Action	Last Name	First Name	Middle Initial	Status
	To	Linh		Active

## Update cost centre group for a user

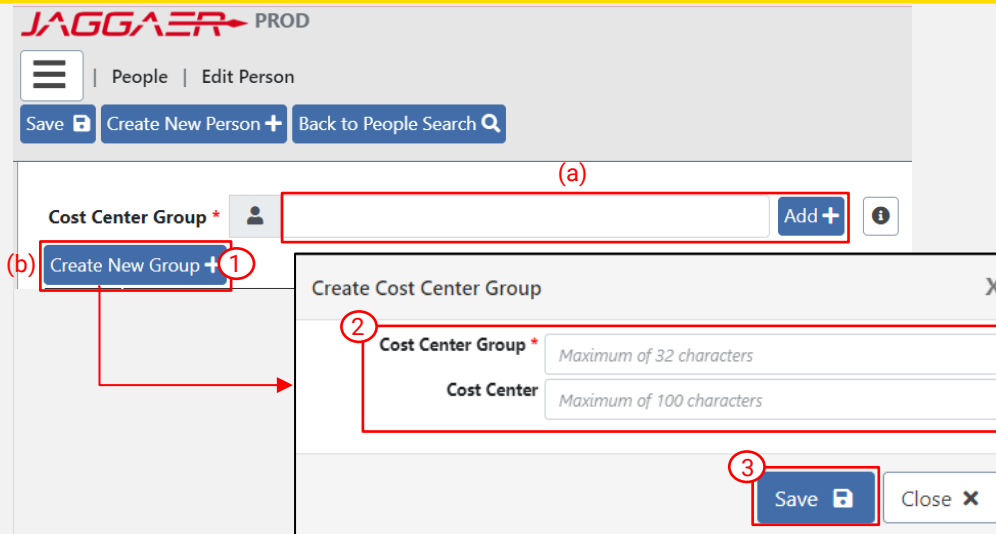
### Add a cost centre group to user profile:

#### (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:

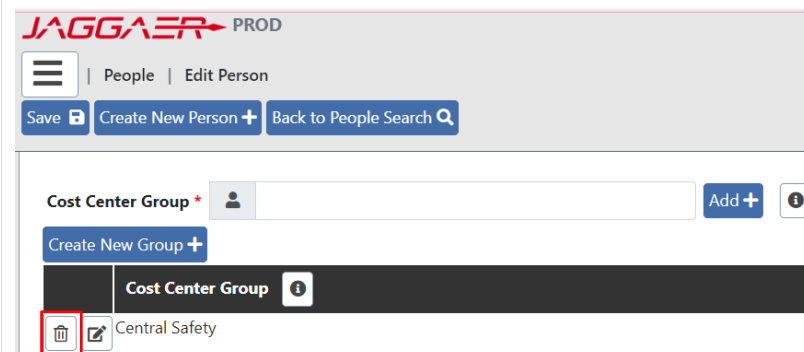
- 1 Click **Create New Group**. A new window will appear.
- 2 Enter the new **Cost Center Group** name and new **Cost Center**
- 3 Click **Save** to add to user profile.



**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

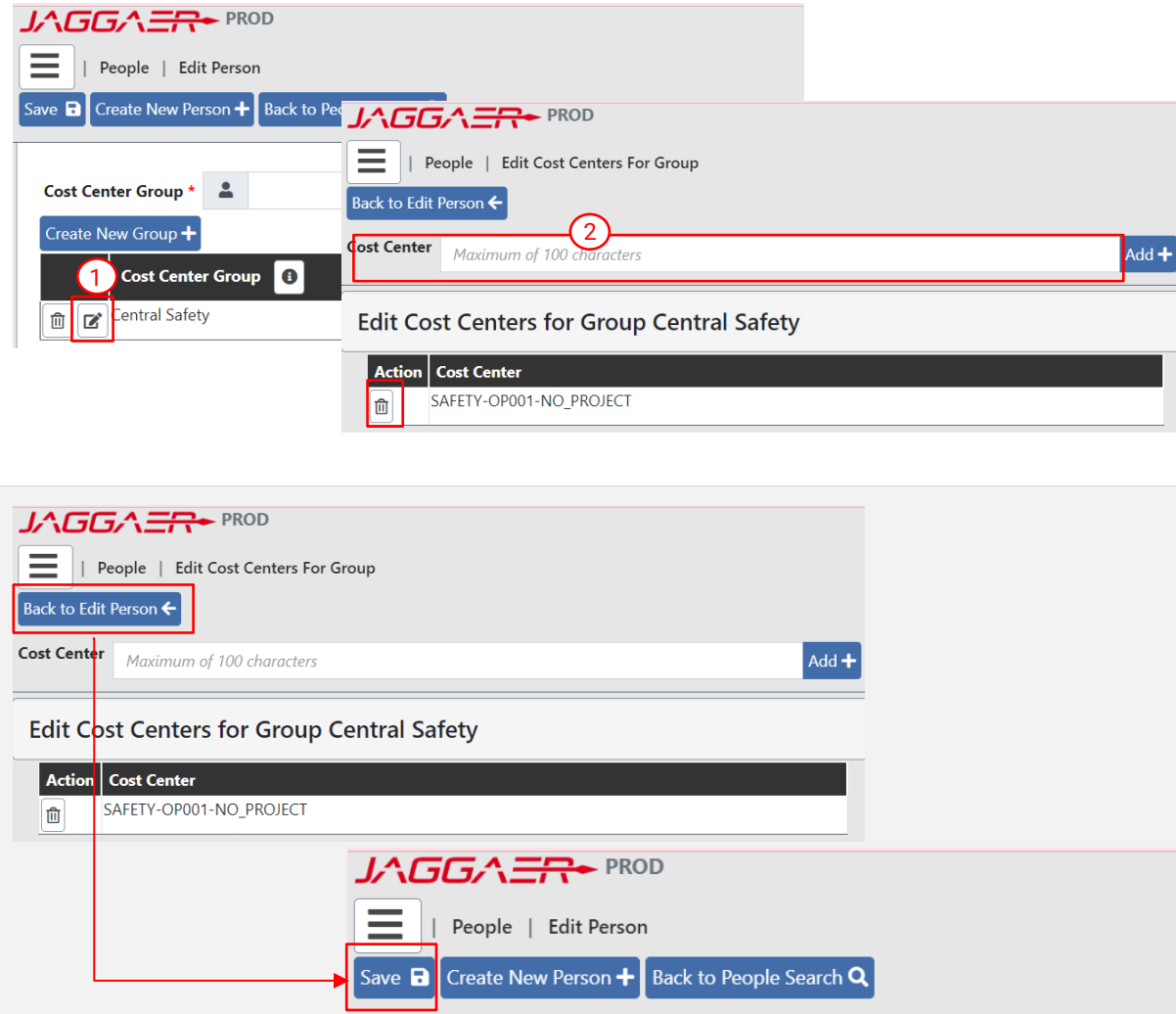
### Add/Remove a cost centre from an existing Cost Centre Group:

**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.

### Save changes

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



**JAGGAER PROD**


People | Edit Person

Save Create New Person + Back to People Search


**JAGGAER PROD**

People | Edit Cost Centers For Group

Back to Edit Person

Cost Center Group \* 

Create New Group +


① Cost Center Group 

Central Safety

Cost Center  Add +

②

Edit Cost Centers for Group Central Safety

Action	Cost Center
	SAFETY-OP001-NO_PROJECT

**JAGGAER PROD**

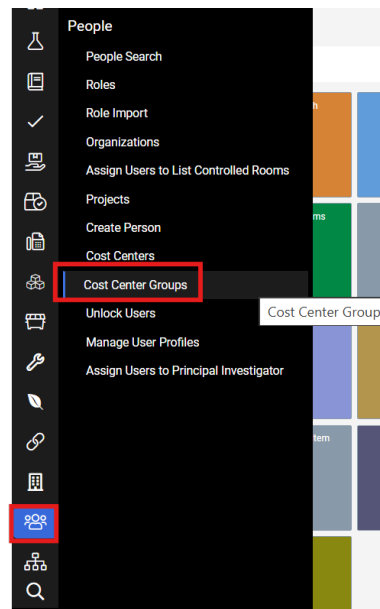
People | Edit Person

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  icon









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





**JAGGAER** PROD

People | Cost Center Groups

Cost Center Group

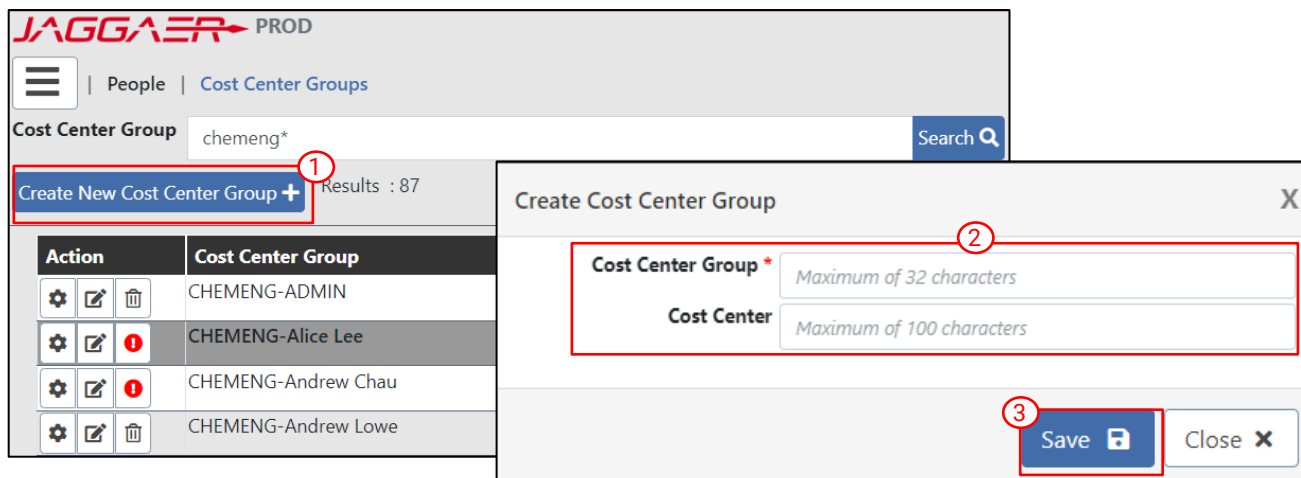
Create New Cost Center Group + Results : 87

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 [REDACTED]
	CEIC-RE783 [REDACTED]
	CEIC-SPF02- [REDACTED]
	RES/LABS-OP001 [REDACTED]

### 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

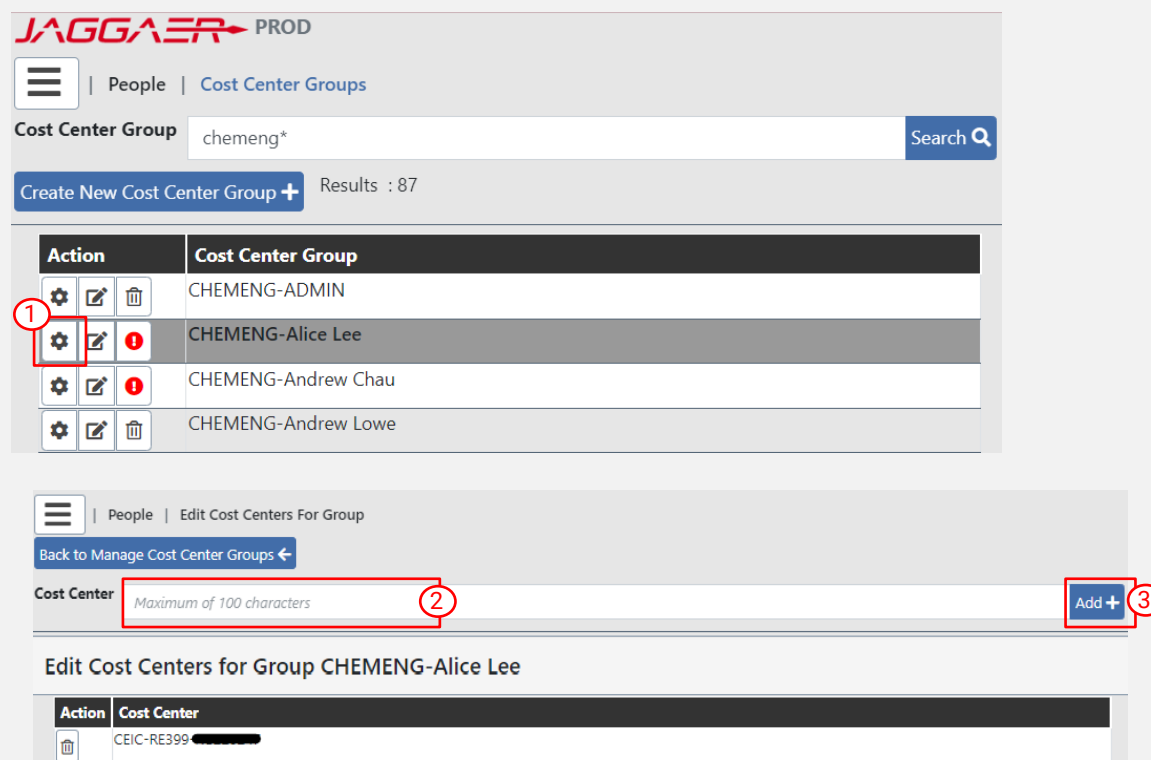
Cost Center Group \* Maximum of 32 characters

Cost Center Maximum of 100 characters

Save  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 with the exact format of **DepartmentID-FundID-ProjectID**
- 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-Andrew Chau
  	CHEMENG-Andrew Lowe

People | Edit Cost Centers For Group

Back to Manage Cost Center Groups ←

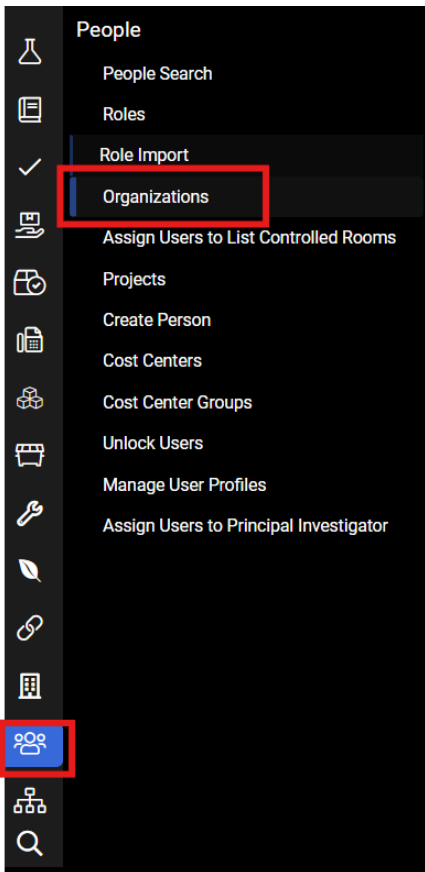
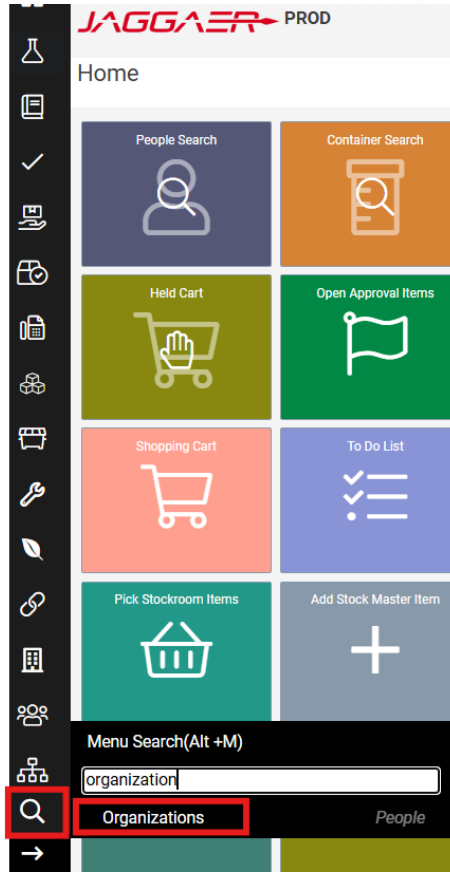
Cost Center Maximum of 100 characters Add +

**Edit Cost Centers for Group CHEMENG-Alice Lee**

Action	Cost Center
	CEIC-RE399

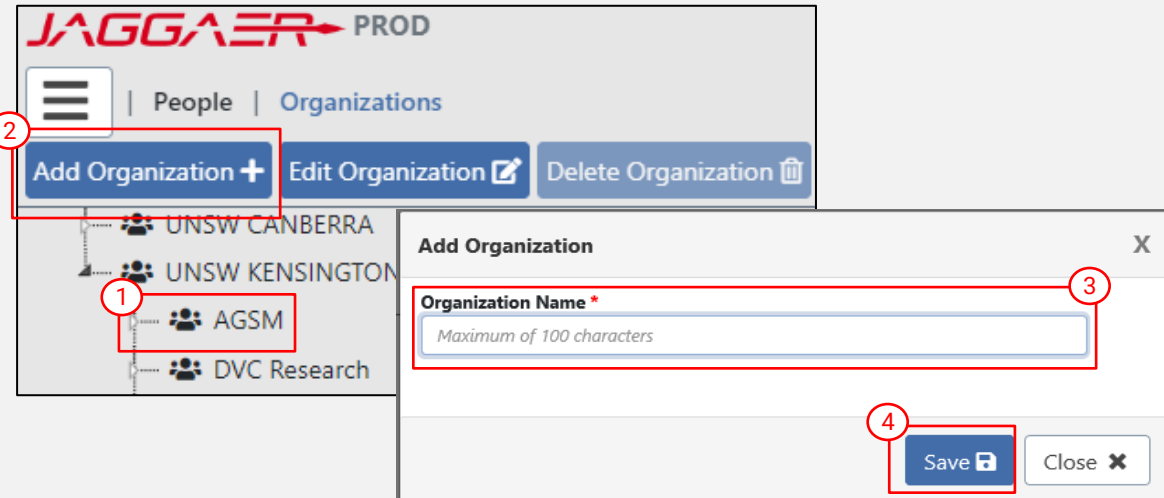


## 3. Manage Organisation in Jaggaer

Step	Screenshot
1. In the Home page, go to <b>People</b> icon -> <b>Organizations</b> to open Organization page.	<div>  </div> <div>or</div> <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**.

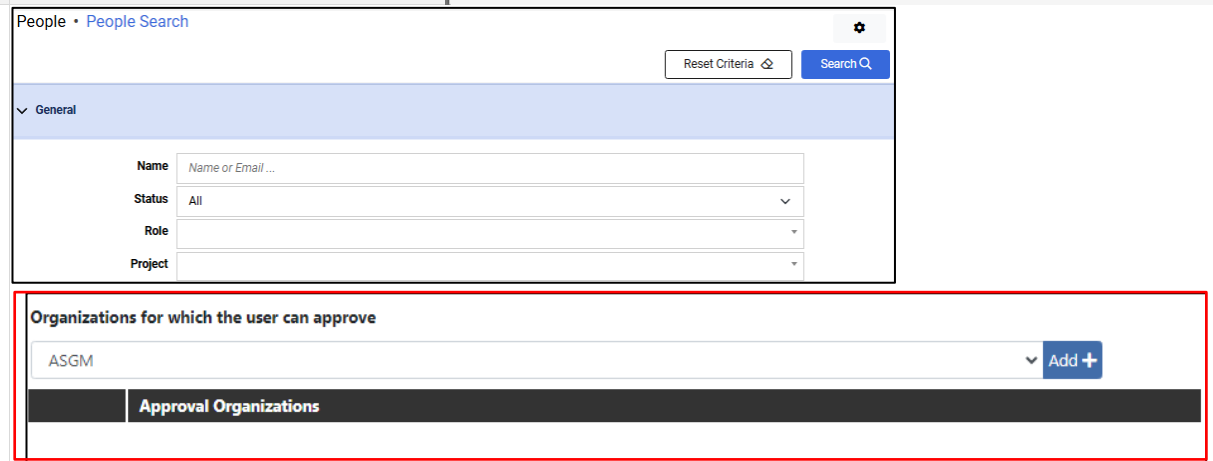


The screenshot shows the JAGGAER PROD interface. In the 'Organizations' tab, a list of organizations is displayed: UNSW CANBERRA, UNSW KENSINGTON, AGSM, and DVC Research. The 'AGSM' organization is selected, indicated by a red box and number 1. A red box and number 2 highlights the 'Add Organization' button. An 'Add Organization' modal is open, showing a text field for 'Organization Name' with a red box and number 3. The modal also has a 'Save' button with a red box and number 4, and a 'Close' button.

**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 Organizations** list
- Click **Save**.



The screenshot shows the 'People Search' page. Under the 'General' tab, there are fields for Name, Status, Role, and Project. Below these fields, there is a section titled 'Organizations for which the user can approve'. This section contains a dropdown menu with 'AGSM' selected, and an 'Add' button next to it. A red box highlights this section. Below the dropdown, there is a table titled 'Approval Organizations'.

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.

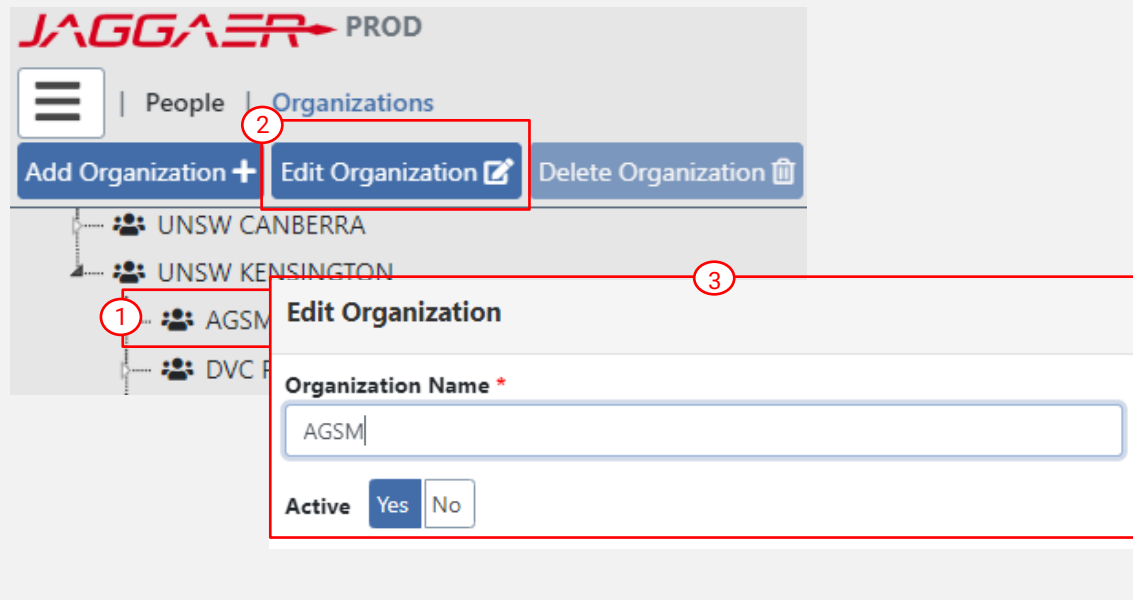
## Edit Organisation

- 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 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 organisation are reassigned before inactivating the organisation.



The screenshot shows the JAGGAER PROD interface. The 'Organizations' tab is selected. A list of organizations is displayed: UNSW CANBERRA, UNSW KENSINGTON, AGSM, and DVC. The 'AGSM' organization is selected, and the 'Edit Organization' modal is open. The modal contains the following fields and controls:

- Organization Name \***: A text input field containing 'AGSM'.
- Active**: A toggle switch with 'Yes' selected and 'No' unselected.