Create Accounting Centre Groups and Assign Members (W5)

This version is superseded. Click here to view the latest guide.

PURPOSE

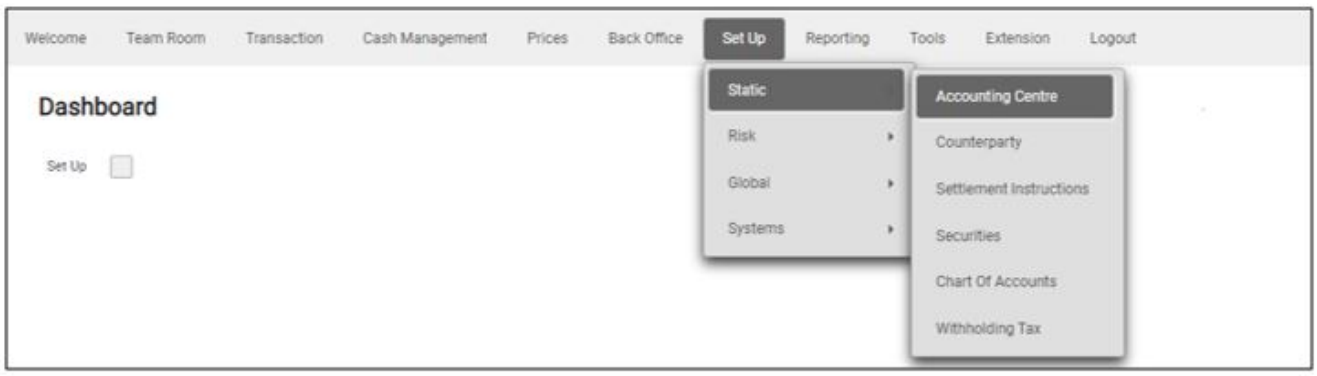
This document is the detailed procedure on creating new accounting centre group. It also shows how to assign members in an accounting centre group.

WHY IS IT IMPORTANT

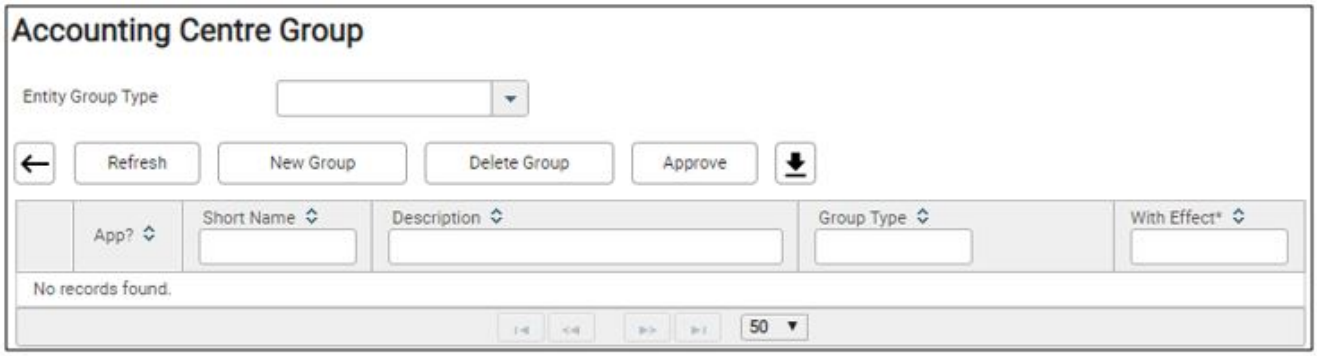
The purpose of assigning accounting centres to groups is to facilitate the control of access rights of accounting centres that users can access/ view in CS Lucas system.

PROCEDURE

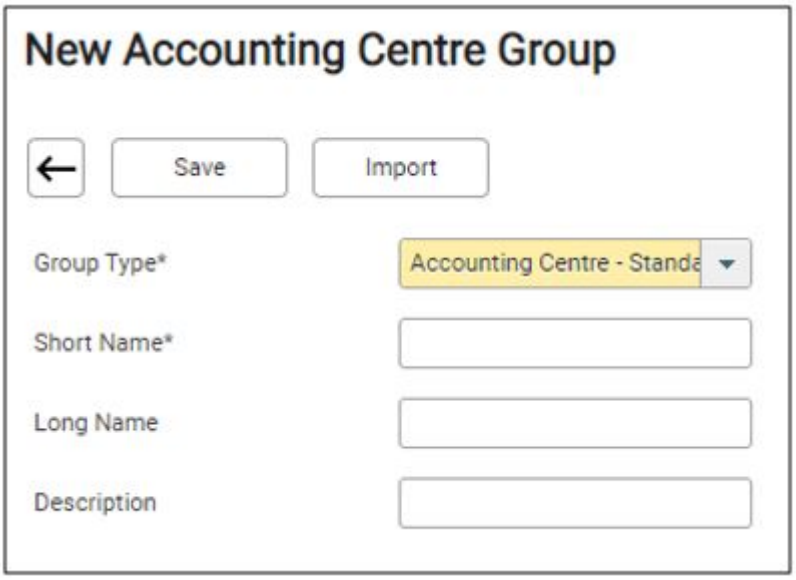
1. Click Set Up > Static > Accounting Centre.



2. In the Accounting Centre screen click Group The screen below will be displayed.



3. Click New Group to go to New Accounting Centre Group screen.

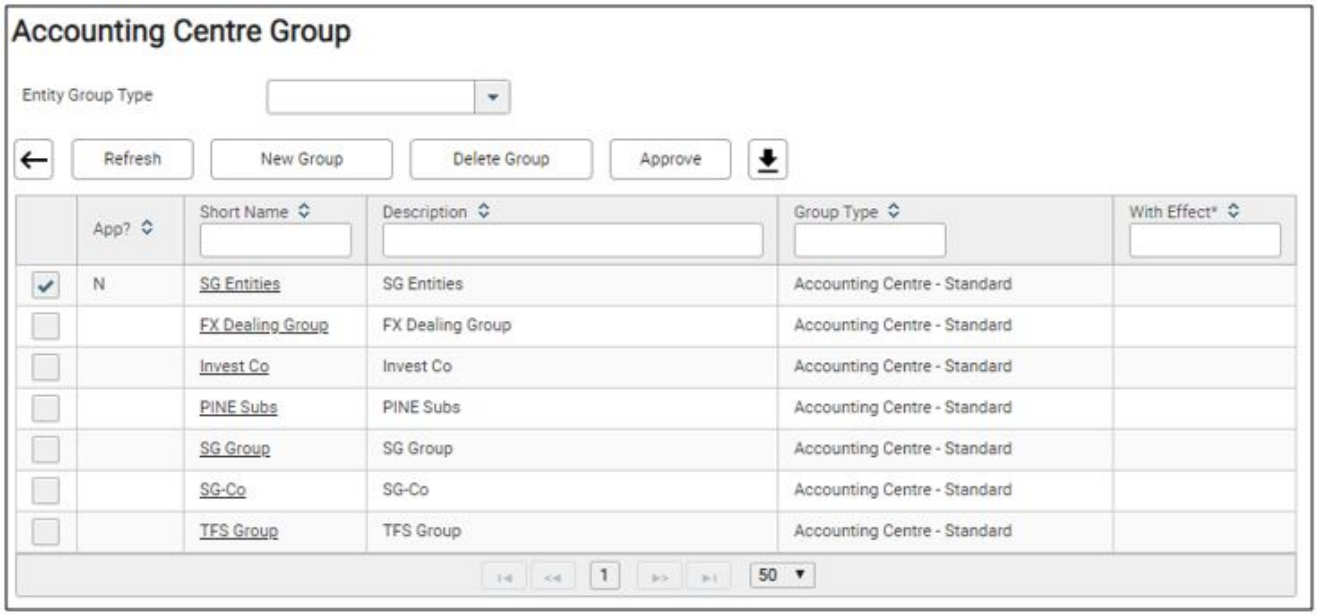


4. Leave the Group Type as default, which is Accounting Centre – Standard. Fill in the Short Name field, this is mandatory.

5. You may also fill out the Long Name and Description fields, these are optional.

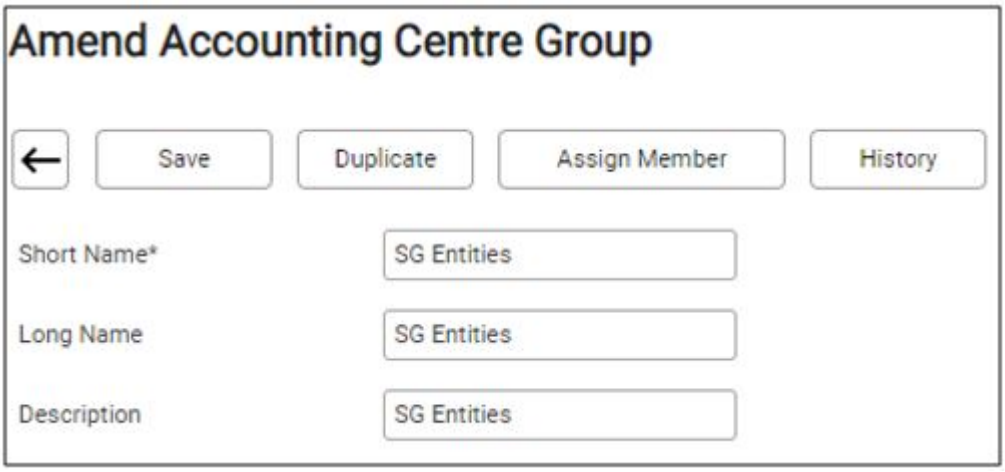
6. In this example, we will create an accounting centre group called SG Entities. Click Save.

7. Back to the Accounting Centre Group main screen, click on the tick box on the left of newly added accounting centre group.

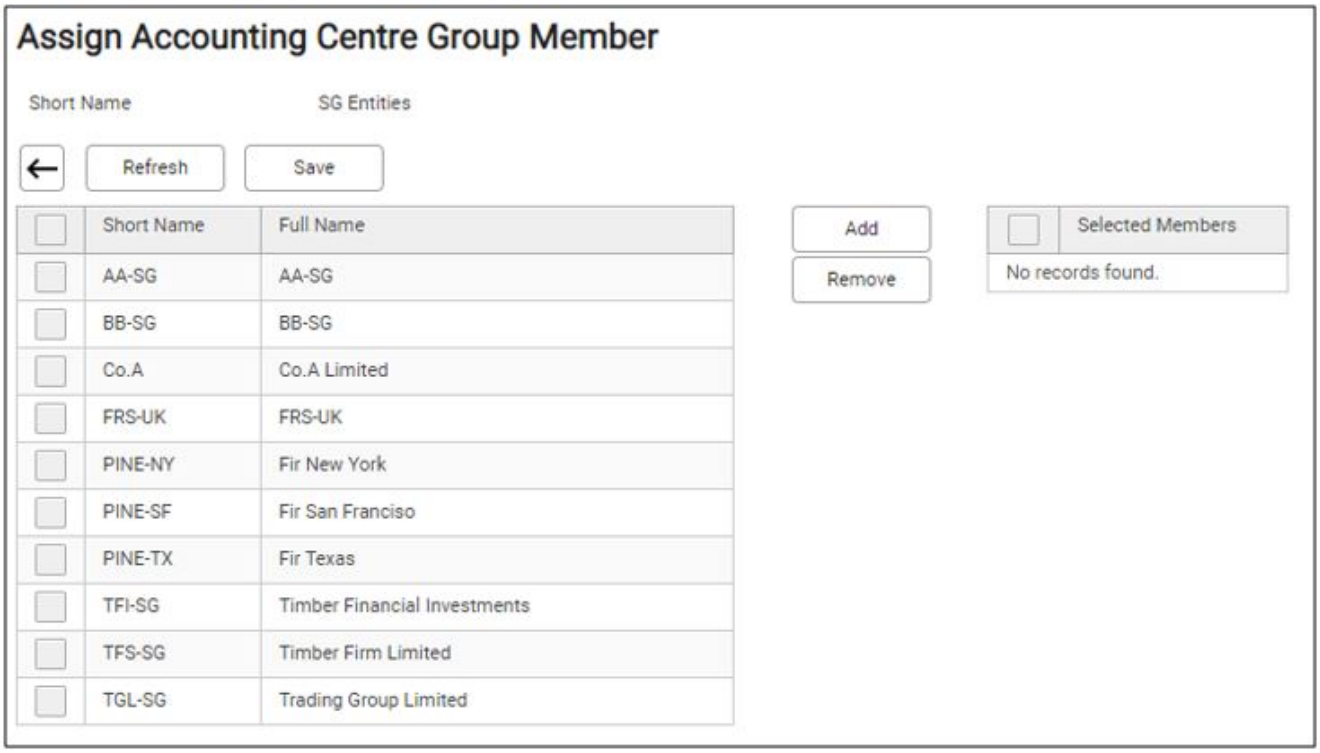


8. Click Approve. The accounting centre group created is now approved.

9. To assign members to the accounting centre group, click on the short name of the group to amend. The screen below will be displayed.

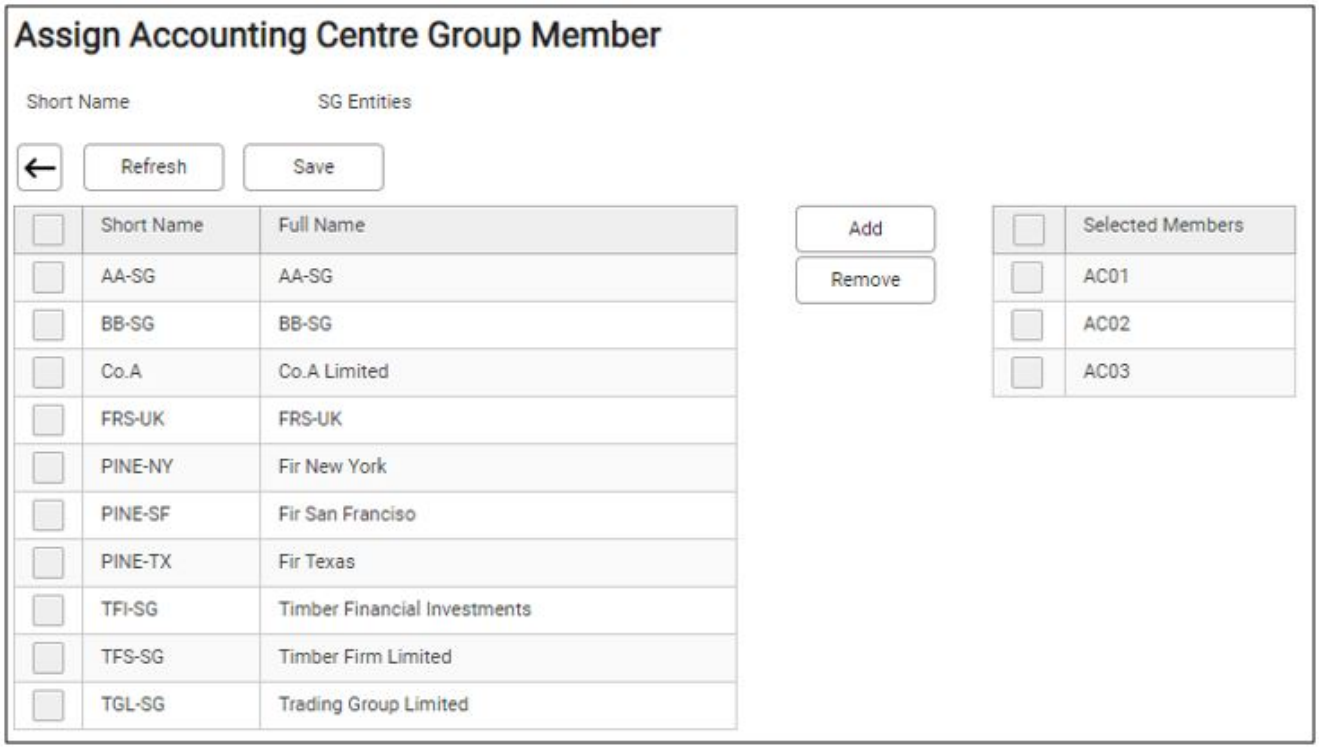


10. Click on Assign Member. All accounting centres will be displayed on the screen.



11. Tick on the boxes beside the accounting centres to add to the accounting centre group.

12. Once chosen, click Add . The selected members will be moved to the right of the screen.



13. Click Save, then in the next screen, click Cancel.

14. From the main Accounting Centre Group screen, click on the tick box next to the accounting centre group which was amended.

15. Click Approve.

16. The members assigned to the accounting centre group are now approved.

FREQUENTLY ASKED QUESTIONS

FAQ01. I can’t create new accounting centre groups.

Please check that you have sufficient access rights. The access right for this process is 10524 – Create new accounting centre group.

FAQ02. I can’t assign members to the accounting centre groups.

Please check that you have sufficient access rights. The access right for this process is 10531 – Amend accounting centre group membership.

RELATED INFORMATION

User Groups & Assigning Permissions

CHANGE HISTORY

Date	By	Changes
15-Feb-2008	-	Created
28-Jul-2015	CS	Included section for FAQ
14-Jan-2016	Clarissa	Rewritten. Reformatted.
17-Aug-2018	Silpa	Updated step1 and screenshot.
07-Nov-2019	Lyra	Updated Screenshots