# Create Accounting Centre Groups and Assign Members

See previous W5 version 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.

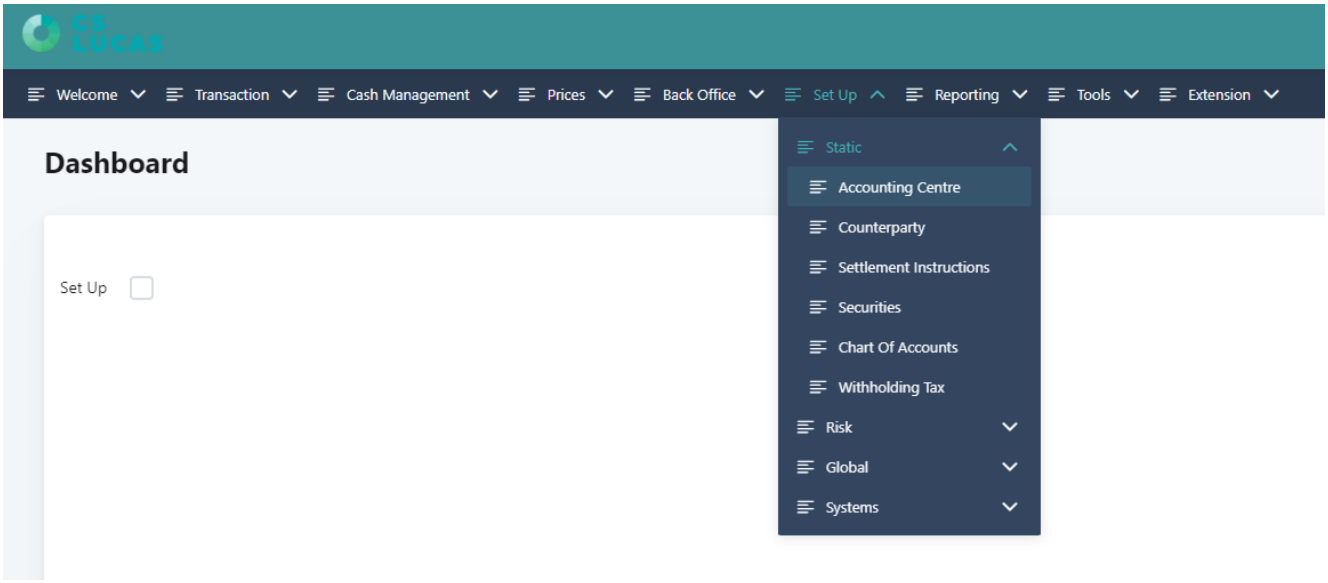
**WHY IS IT IMPORTANT**

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.

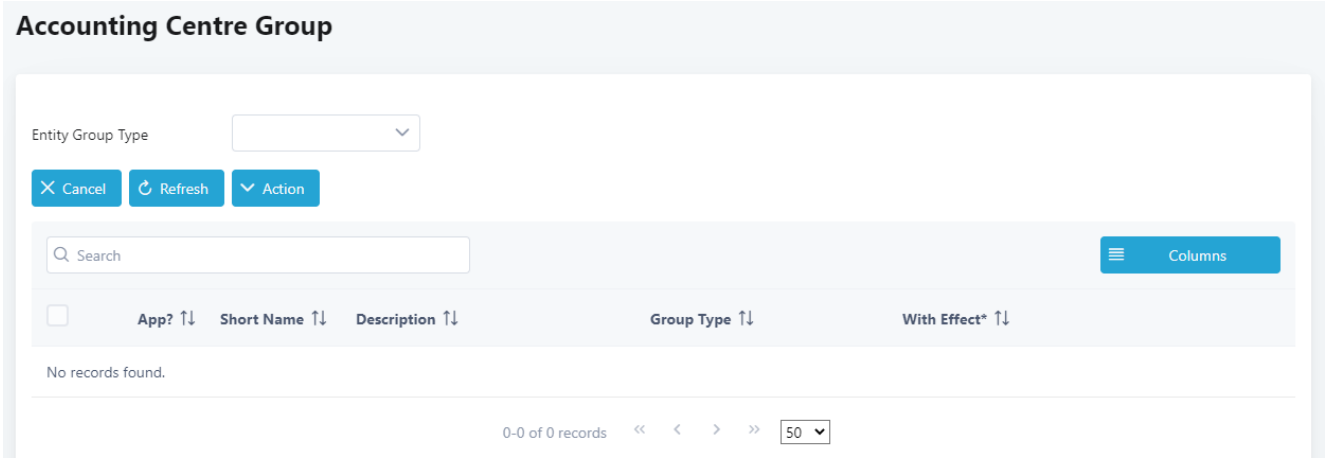
**PROCEDURE**



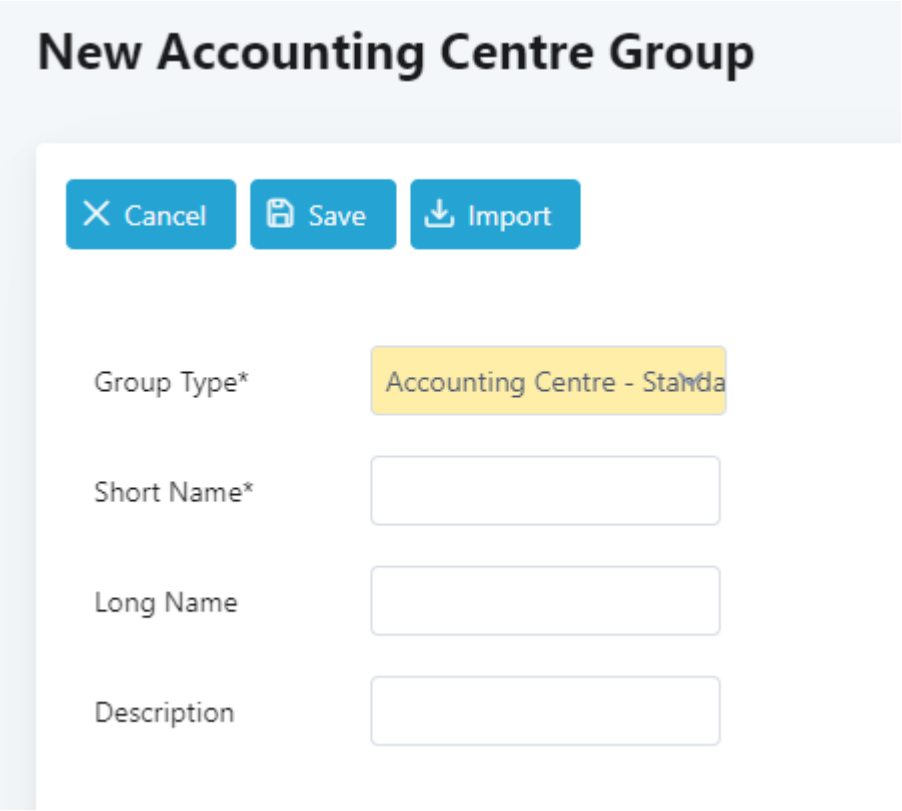
1. Click Set Up > Static > Accounting Centre.




2. In the Accounting Centre screen, click on Group button. The Accounting Centre Group page will be displayed.




3. Click on Action and select New Group to go to New Accounting Centre Group screen.

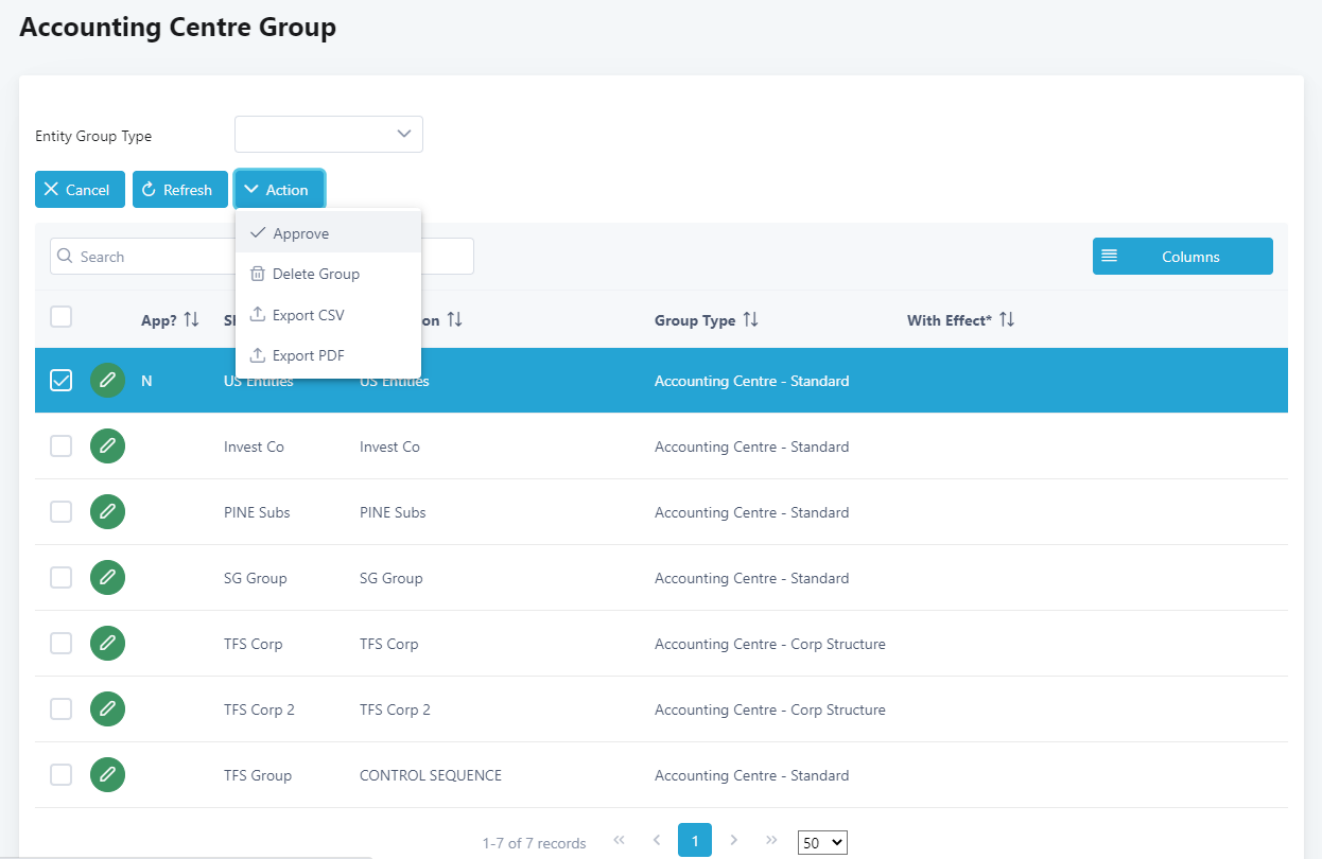



4. Leave the Group Type as default, which is Accounting Centre – Standard. Fill in the Short Name field, this is mandatory.

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

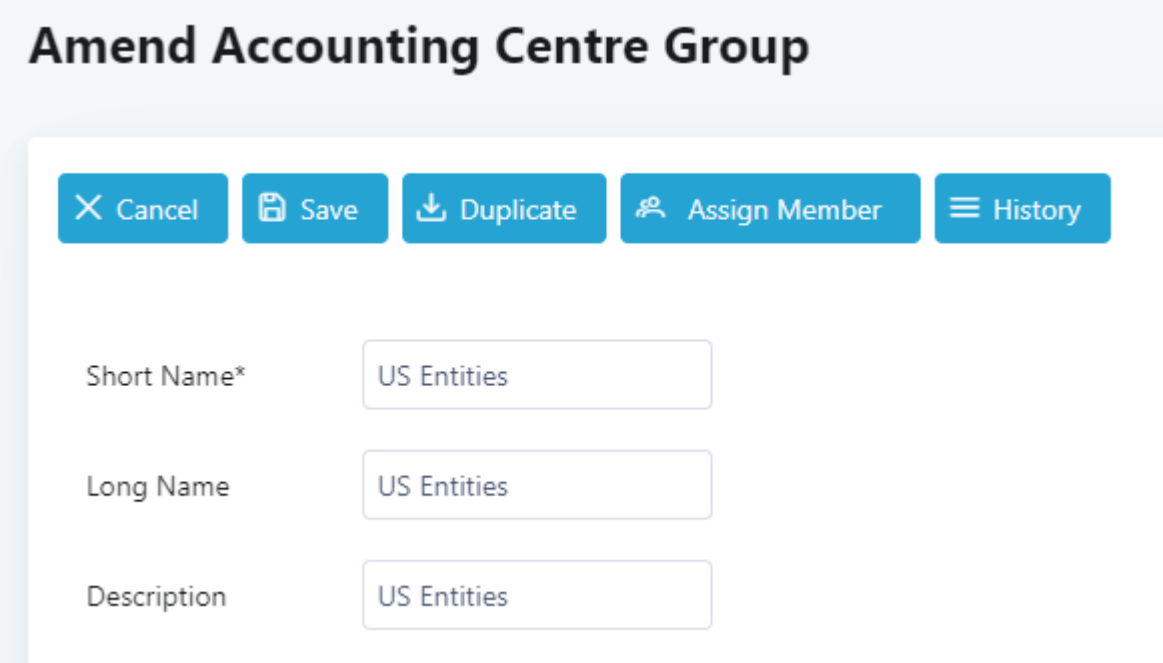
6. In this example, we will create an accounting centre group called US Entities. Click Save.

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

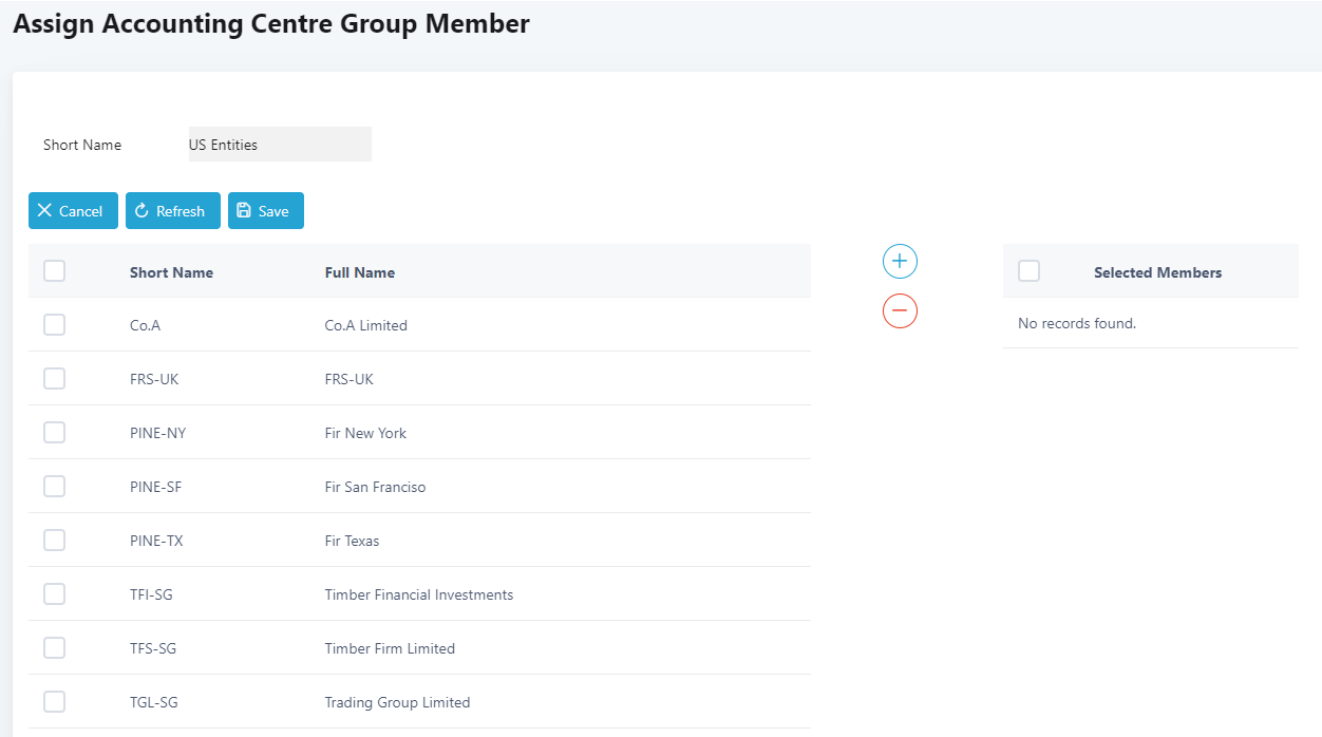



8. Click Approve. The accounting centre group created is now approved.

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



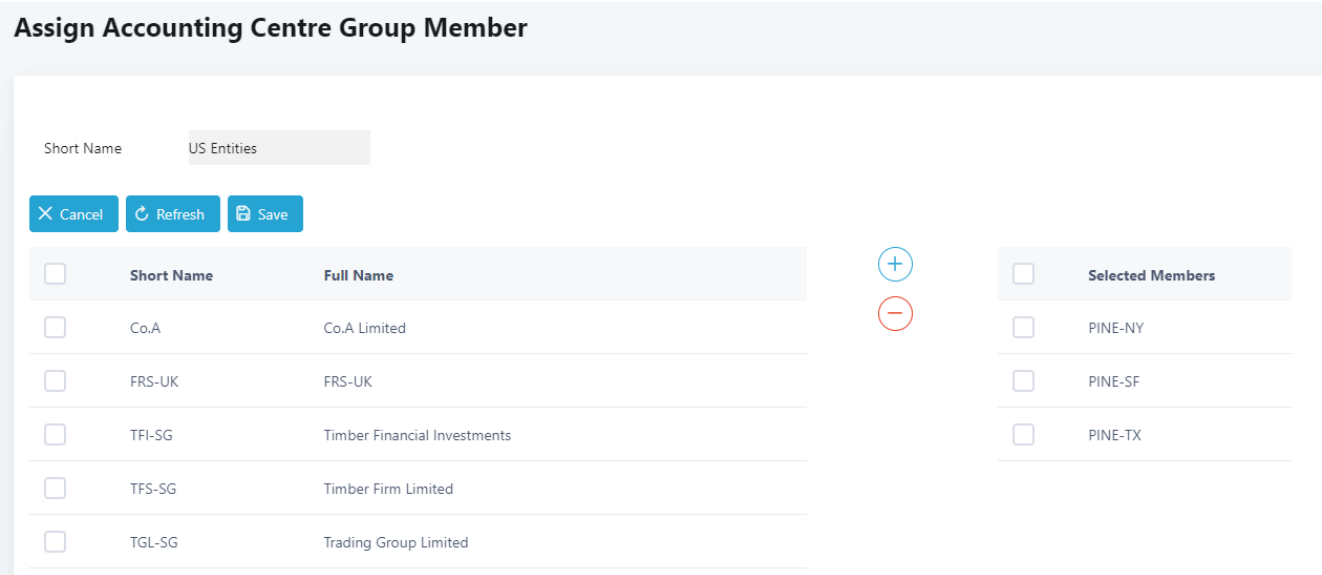

10. Click on Assign Member. All accounting centres will be displayed on the screen.




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

Limitation: If the “Select All” checkbox is checked, you can deselect it by clicking the “Refresh” button. This will deselect all currently selected options.

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 on Action and Approve.

16. The amended accounting centre group is 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 step 1 and screenshot. |
| 7-Nov-2019 | Lyra | Updated screenshots. |
| 30-Jan-2023 | TS | Updated to W6 instructions and screenshots. |