

# Report 1029: Entity Group Assignment by User Group

[See previous W5 version guide](#)

## **PURPOSE**

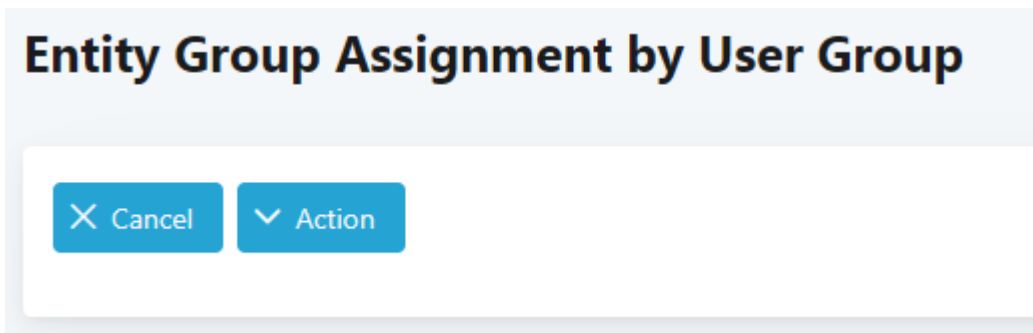
To provide the details used by CS Lucas that the user group has assign which members in the entity group the permission rights to view in the system.

## **WHY IS THIS IMPORTANT?**

Allow users to verify the details and assignment setup in the system for each Entity Group Assignment by User Group.

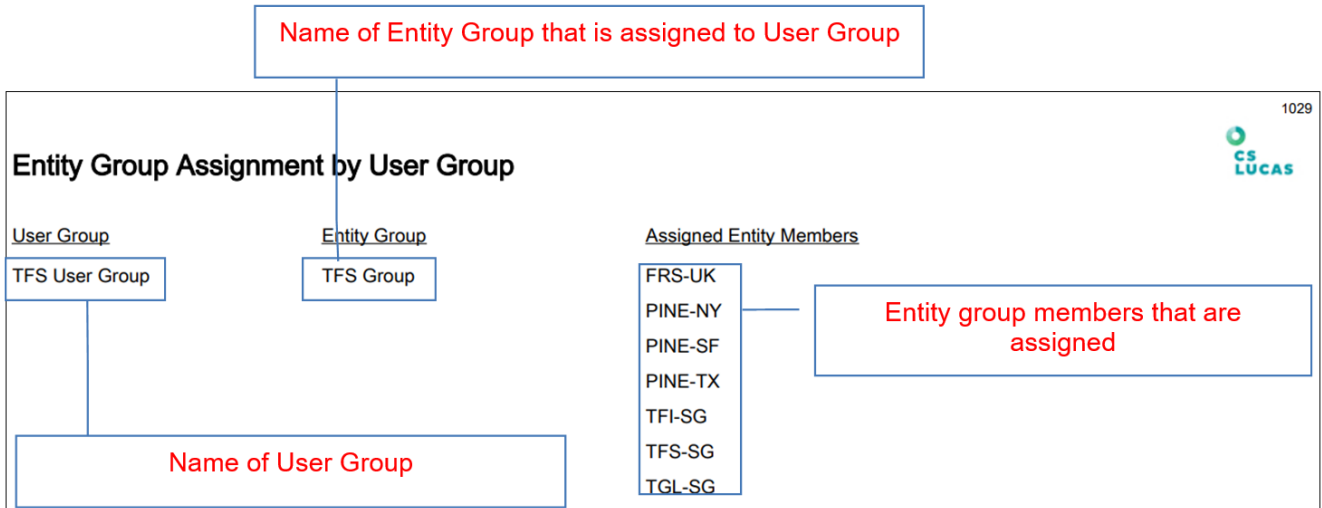
## **QUERY**

1. Navigate to Reporting > Standards > Report 1029: Entity Group Assignment by User Group.



2. Click Action and select the required format.

3. The report shows the User group name, Entity Group name and Assigned Entity Members.



For explanation of Excel Raw export, please see [link](#).



For explanation of buttons, please see [link](#).

## **DATA SOURCE - USER GROUP DETAILS**

To view the following details,

<b>A</b>	<b>B</b>	<b>C</b>
<u>User Group</u>	<u>Entity Group</u>	<u>Assigned Entity Members</u>
TFS User Group	TFS Group	FRS-UK PINE-NY PINE-SF PINE-TX TFI-SG TFS-SG TGL-SG

Follow the steps as shown below:

1. Navigate to Set Up > Global > User and Rights.
2. Click the Group button.
3. Click the Edit button next to the user group: TFS User Group.

## Amend User Group

✕ Cancel

💾 Save

👤 Assign Permission

📄 Duplicate

👤 Assign User

☰ History

Short Name\*

TFS User Group

A

Full Rights

No



Apply To Acct Cntr Group\*

TFS Group



B

Description

TFS User Group

## ENTITY GROUP DETAILS

1. Navigate to Set Up > Static > Accounting Centre.
2. Click the Group button.
3. Click Refresh.

## Accounting Centre Group

Entity Group Type



✕ Cancel

🔄 Refresh

⌵ Action

🔍 Search



Columns



App? ↑↓

Short Name ↑↓

Description ↑↓

Group Type ↑↓

With Effect\* ↑↓



Invest Co

Invest Co

Accounting Centre - Standard



PINE Subs

PINE Subs

Accounting Centre - Standard



SG-Co

SG-Co

Accounting Centre - Standard



TFS Corp

TFS Corp

Accounting Centre - Corp Structure



TFS Corp 2

TFS Corp 2

Accounting Centre - Corp Structure



TFS Group

CONTROL SEQUENCE

Accounting Centre - Standard

1-6 of 6 records



50

- 4. Click the Edit button next to the Accounting Centre Group Short Name. In this example, TFS Group.
- 5. Click Assign Member.
- 6. The selected members assigned to the accounting centre group will be shown.

Assign Accounting Centre Group Member

Short Name

TFS Group

B

Cancel

Refresh

Save

☐

Short Name

Full Name

No records found.

+

-

C

☐

Selected Members

☐

FRS-UK

☐

PINE-NY

☐

PINE-SF

☐

PINE-TX

☐

TFI-SG

☐

TFS-SG

☐

TGL-SG

**FREQUENTLY ASKED QUESTIONS**

**RELATED INFORMATION**

[General Formatting For All Reports](#)

**CHANGE HISTORY**

Date	By	Changes
25-Apr-2016	Ruijin	Created.
23-May-2016	Rj	Formatted.
5-Aug-2016	Li Ping	Rewritten. Reformatted.
10-Dec-2019	Lyra	Updated screenshots.
15-Aug-2024	TS	Updated to W6 instructions and screenshots.