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Sage Administration

This procedure will explain the steps to follow for administration of the Sage software.

This function will be managed by the banking and accounting team.

There is a Sage administration role held within CFAT that is responsible for the following activities:

- Adding new users to the system
- Creating new user roles
- Amending existing user roles

Sage also holds the functionality for users with the correct level of access to create and amend account codes and cost centres (cost centres are known as sites in Sage). This would only be done in conjunction with a wider project or at financial year end any changes made would need to include updates to BaNCS as both systems need to remain aligned.
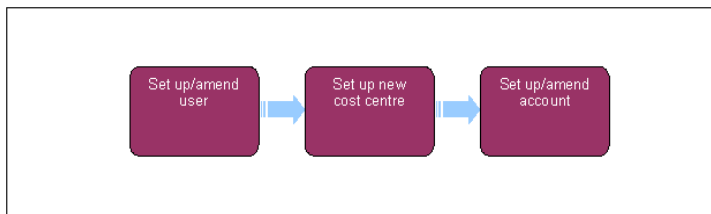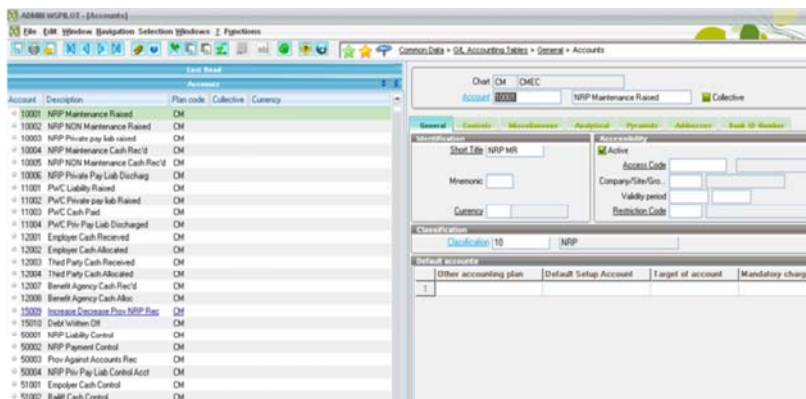

Set up/amend user

1. To set up a new user in Sage or amend an existing user's profile you will need to contact the appropriate IT support service provider.

Set up new cost centre

2. From the left hand navigation menu select **Parameters**, **Organisation Structure** and then **Sites**.

3. Go to the menu bar at the top of the screen, select **File** and then **New**. Input the requested data.

Setup/amend account

4. From the left hand navigation menu select **Common Data**, **GL Accounting Tables**, **General** and then **Accounts**. An example of the screen is shown below:

On the left of the screen the accounts already set up are listed.

The right of the screen is used to set up, amend or delete accounts.

5. To create an account populate the following fields:

- **Account** – defines the number and description of the account

- **Currency** – defines the currency of the account

- **Classification** – defines where in the trial balance the account will appear.

6. From the bottom right of the screen select **Create**, **Save** and then **End**.

To amend an account, select it from the left hand menu, and then amend the data on the right side of the screen. Once complete, select **Save** and then **End**.

Finance And GL Overview