9.2 Defining an Allocation Group

Purpose: Use this document as a reference for defining an allocation group in ctcLink.

Audience: Finance staff

You must have at least one of these local college managed security roles:

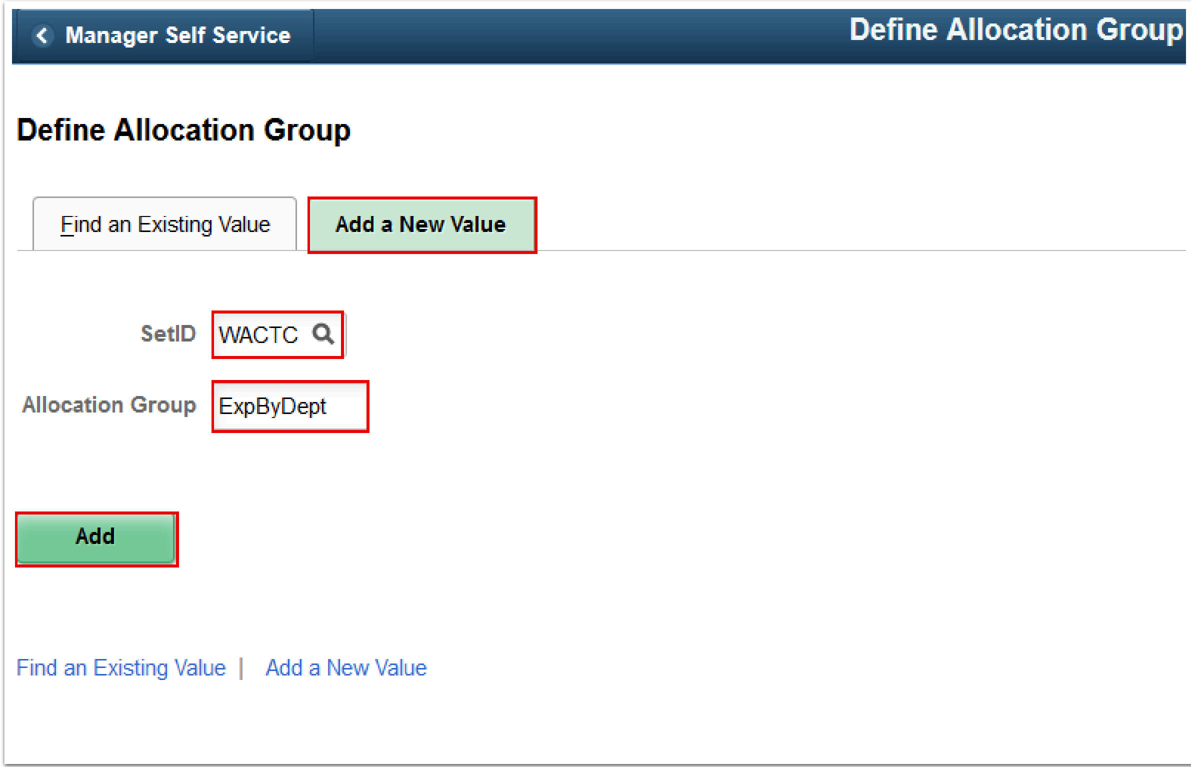
- ZZ General Ledger Allocations

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

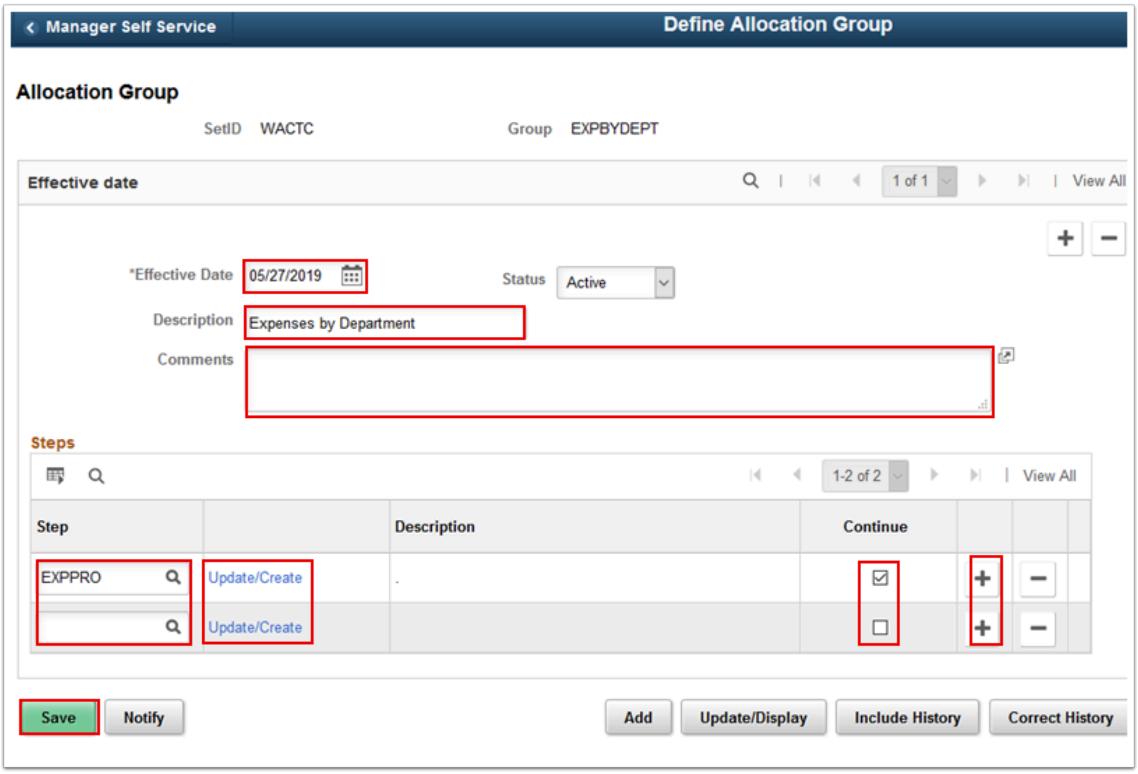
Defining an Allocation Group

Navigation: NavBar > Navigator > Allocations > Define and Perform Allocations > Define Allocation Group

1. The **Define Allocation Group** search page displays.
2. Select the **Add a New Value** tab.
3. Enter **SetID**.
4. Enter **Allocation Group**.
5. Select **Add**.



6. The **Allocation Group** page displays.
7. Enter **Effective Date**.
8. Enter **Description**.
9. Enter **Comments**.
10. Select **Step**.
11. Select the **Update/Create** link to open the Define Allocation Step page in a new window.
12. Select the **Continue** checkbox if you want the system to continue processing even if the allocation step fails.
13. Select the **Add a New Row [+]** icon to continue adding Steps.
14. Select **Save**.



15. Process complete.