



Cost Center Help Guide

Creating a Cost Center in EnergyCAP

Description

A Cost Center is a group or collection of related accounts. Cost Centers are used to organize vendor accounts in a hierarchy representing your organization's financial structure. Cost Centers also provide a way of reporting and viewing energy use and cost data related to groups of accounts. Cost Centers can contain other Cost Centers, as well as individual accounts.

This section will...

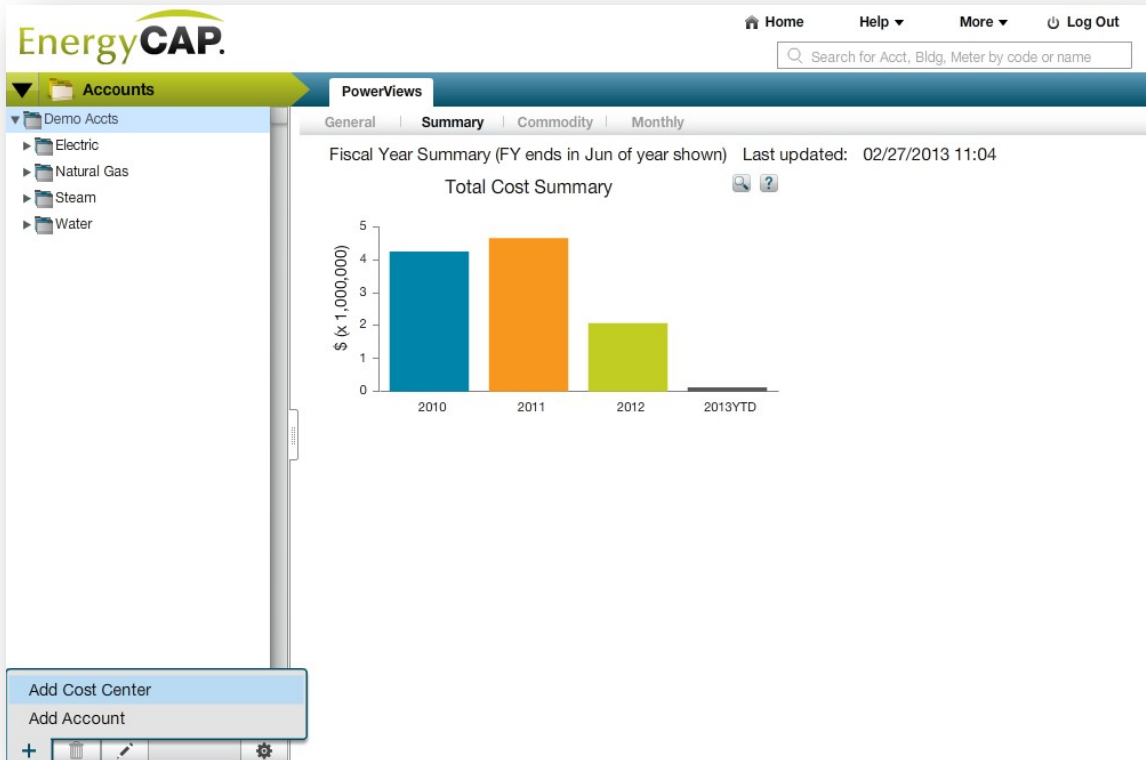
- Describe the process for adding a cost center.

Prerequisites

- The ability to add cost centers requires permission associated with the following User Roles:
 - Administration Full Access
 - Bill Entry & Account Setup

Step-by-Step

1. Select **Accounts** from the Main Menu. The Accounts Tree View will be displayed on the left.
2. Click the **Add** button below the Tree View. Click the **Add Cost Center** menu option.



3. On the **General** tab, input the general information:

- In the **Name** field, enter the display name for the Cost Center.
- In the **Code** field, a code based on the name will be automatically created. This field can be changed to any desired value. Spaces and special characters cannot be included in the Code.



The screenshot shows a dialog box titled "Cost Center Wizard" with a "General" tab selected. The dialog contains the following text and fields:

Enter the common name of this cost center and give it a code or abbreviation.

Name *

Code *

* Required Field

Buttons: Cancel, Save

Name: Name Cost Centers according to internal accounting breakdowns [region, complex or functional grouping] **OR** by vendor name.

Code: RegionAbbreviation_commodity [Ex: NWREG_WATER]
OR agency#_vendor [Ex: 0010_OGE]

4. Click **Finish**. The **Cost Center/Account Wizard** will close and the new Cost Center will be added to the tree hierarchy.

Rules & Restrictions

A Cost Center can only be placed under another Cost Center. This includes the topmost Cost Center listed on the tree.