Accessing Dataset Repository

PURPOSE

This document describes the settings needed for the user to retrieve dataset from the CS Lucas system.

WHY IS THIS IMPORTANT?

Accessing the dataset repository allows users to extract and synchronize their Excel and Power BI workbooks with real-time data from the CS Lucas system.

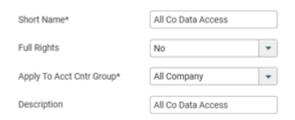
To make the connection to the system, user needs to configure his account.

PROCEDURE

The following steps are elaborated in more detail in <u>Set up user group and permissions.</u>

Step 1:

- Create a user group. (Illustrated as All Co Data Access)
- Apply the group to an Acct Cntr Group. Illustrated here as All Company.



Assign these permissions to the group.



Step 2:

• Users who need access to the dataset repository must activate MFA. See <u>Set Up MFA</u>.

Step 3:

- Assign the user to the group in Step 1. The user will inherit the following rights:
 - 20001 Access for Acct Cntr group. The assigned user will have access to transactions and static data belonging to members of the Acct Cntr group, illustrated here as "All Company".
 - 20002 Access to enterprise static data. The assigned user will have access to enterprise static data shared by all companies E.g., users, prices, exchange rates, transaction logs.

RELATED INFORMATION

CS Lucas data repository

Connection token for CS Lucas data repository

Connecting PowerBI to the CS Lucas data repository

Connecting Excel to the CS Lucas data repository

CHANGE HISTORY