

Create Customised User Guide

PURPOSE

This document shows the procedures on how to create a customised user guide in CS Lucas system.

WHY IS THIS IMPORTANT?

This feature allows users of the system to create their own customised user guide and publish on the system so that it can be shared by all the users of the system.

PROCEDURE

1. Customised user guide can be retrieved on the top right corner of every screen by clicking on the icon. In this example, we will show how to create a customized user guide for accounting centre.
2. From the main menu, select Set Up > Entity.



App?	Short Name	Long Name
<input type="checkbox"/>	A-2	A-2
<input type="checkbox"/>	AA-SG	AA-SG
<input type="checkbox"/>	AB1	AB1
<input type="checkbox"/>	AC01	AC01
<input type="checkbox"/>	AC02	AC02
<input type="checkbox"/>	AC03	AC03
<input type="checkbox"/>	AC08	AC08
<input type="checkbox"/>	AC09	AC09

3. Click on the icon. A new tab will be opened.
4. If there is customised user guide published before, the latest published customised user guide will display. If the text area is blank, this means there is no published customised user guide. Tick on the Maintain checkbox to create a new customised user guide.

Accounting Centre Custom User Guide

☒ Maintain

Save

B *I* U x_2 x^2
A A

↶ ↷ ↶ ↷ ↶ ↷ ↶ ↷

Attachment

Upload File Browse... No file selected.

Created By	Published By
No records found.	

1-6 << >> 50

5. In the free text area, user can type in the new instructions.

Accounting Centre Custom User Guide

☒ Maintain

Save

B *I* U x_2 x^2
A A

↶ ↷ ↶ ↷ ↶ ↷ ↶ ↷

Please click on the Short Name to make changes. Approval will be required.]

6. You may also attach one document at below the text area by clicking the Choose File to browse for the file to attach.

Attachment	
Upload File	<input type="button" value="Browse..."/> No file selected.
Created By	Published By

7. When completed, click Save. A popup appears to confirm, click OK.

If you have browse to a new attachment, it will overwrite the previous attachment. Are you sure you want to proceed?

8. A message saying the customised user guide is updated successfully and it is pending to be publish will be displayed.

Accounting Centre Custom User Guide

☒ Maintain

User guide updated successfully.
There is a new user guide pending to be publish.

9. The customised user guide saved will not be seen by other users in the system unless it is published. To publish the user guide, tick on the Maintain checkbox.

Accounting Centre Custom User Guide

☒ Maintain

10. You will see one user guide is pending for publish at the listing at the bottom of the screen. User guide pending for publish does not have the information on Published By field.

Created By	Published By	
dev01@12dl2d.com@29 Nov 2019 14.03.15	dev01@12dl2d.com@29 Nov 2019 14.06.06	View
<div> <div>1</div> <div>50</div> </div>		

FREQUENTLY ASKED QUESTIONS

FAQ01. I amended the user guide and saved. Can I still discard the changes that I made to the user guide?

Yes. A saved user guide can be discarded before it is publish. Tick on the Maintain checkbox.

Accounting Centre Custom User Guide

☒ Maintain

Click on the View for the unpublished user guide

Created By	Published By	
dev01@12dl2d.com@29 Nov 2019 14.07.55		View
dev01@12dl2d.com@29 Nov 2019 14.03.15	dev01@12dl2d.com@29 Nov 2019 14.06.06	View
<div> <div>1</div> <div>50</div> </div>		

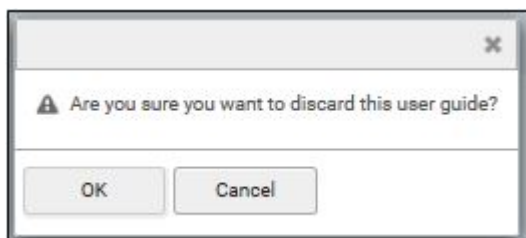
The contents of the user guide displayed on the free text area.

The screenshot shows a web-based editor titled "Accounting Centre Custom User Guide". At the top left, there is a "Maintain" checkbox which is checked. Below it are three buttons: "Save", "Discard", and "Publish". A rich text editor toolbar is visible, containing various icons for text formatting (bold, italic, underline, text color, background color, font size, font family), list creation, indentation, and other standard editing functions. The main content area contains the text: Change Accounting Centre Short Name
Please click on the Short Name to make changes. Approval will be required.

At the bottom of the editor, there is an "Attachment" section with an "Upload File" button and a "Browse..." button. The text "No file selected." is displayed next to the "Browse..." button.

Click Discard.

A popup appears to confirm. Click OK.



The user guide will be discarded.

Note that published user guide cannot be discarded.

FAQ02. What access rights do I need to edit and publish customised user guide?

You would need the following access rights to create/edit and publish customised user guide.

Right ID ↕	Category ↕	Permission ↕
18500	Customized User Guide	Edit Customized User Guide.
18501	Customized User Guide	Publish Customized User Guide.

RELATED INFORMATION

CHANGE HISTORY

Date	By	Changes
14-Sep-2017	Clarissa	Created.
29-Nov-2019	Lyra	Updated Screenshots.