Create Customised User Guide

PURPOSE

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

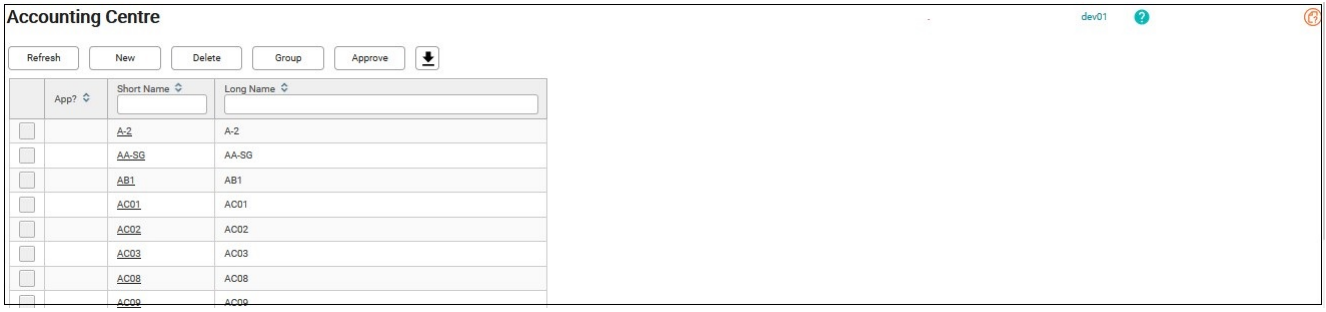
WHY IS THIS IMPORTANT?

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

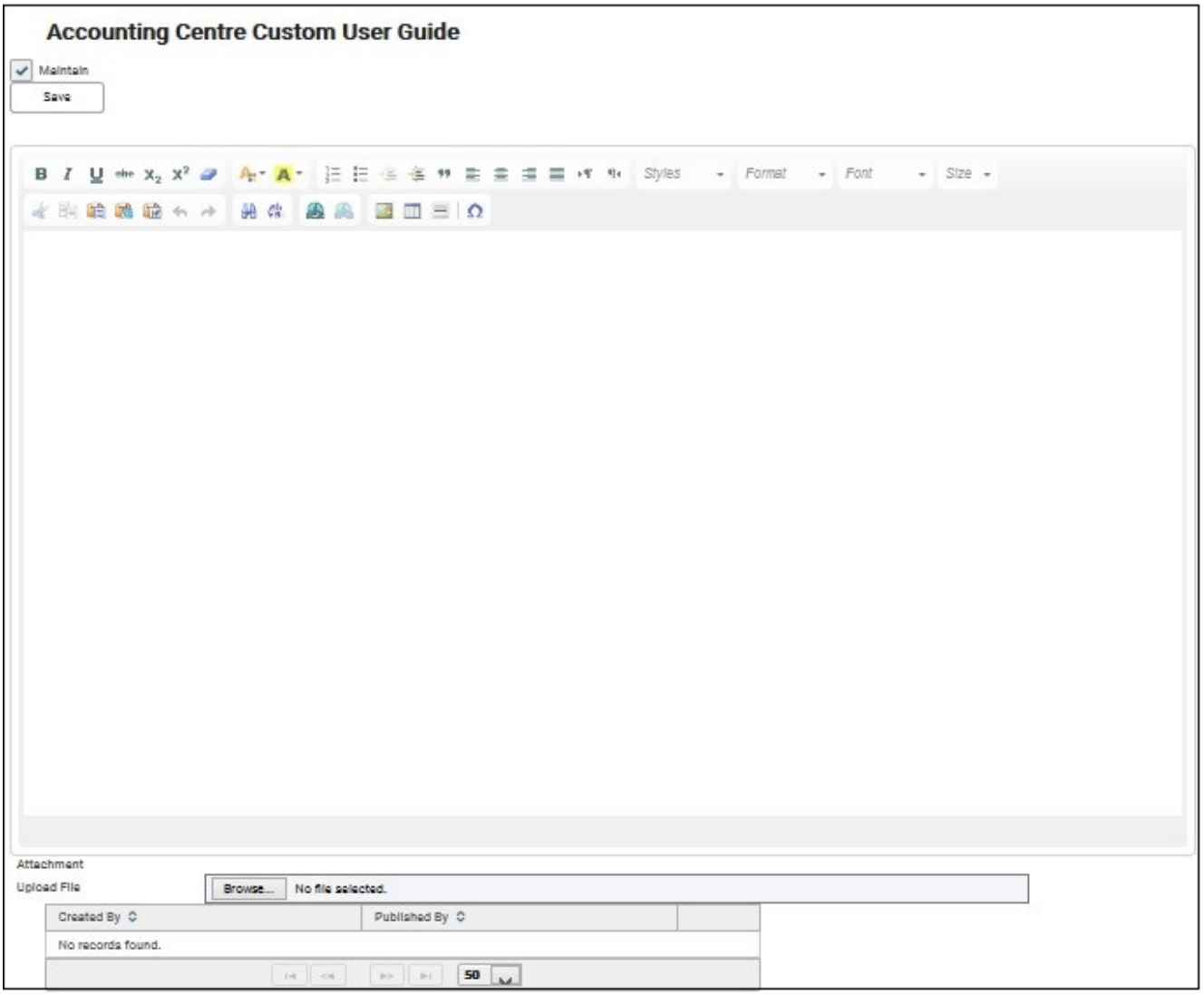
1. Customised user guide can be retrieved on the top right corner of every screen by clicking on the icon. In this example, we will show how to create a customized user guide for accounting centre.

2. From the main menu, select Set Up > Entity.



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.



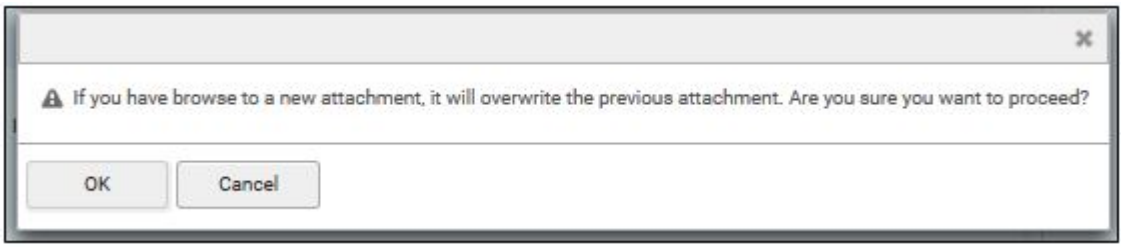
5. In the free text area, user can type in the new instructions.



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



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



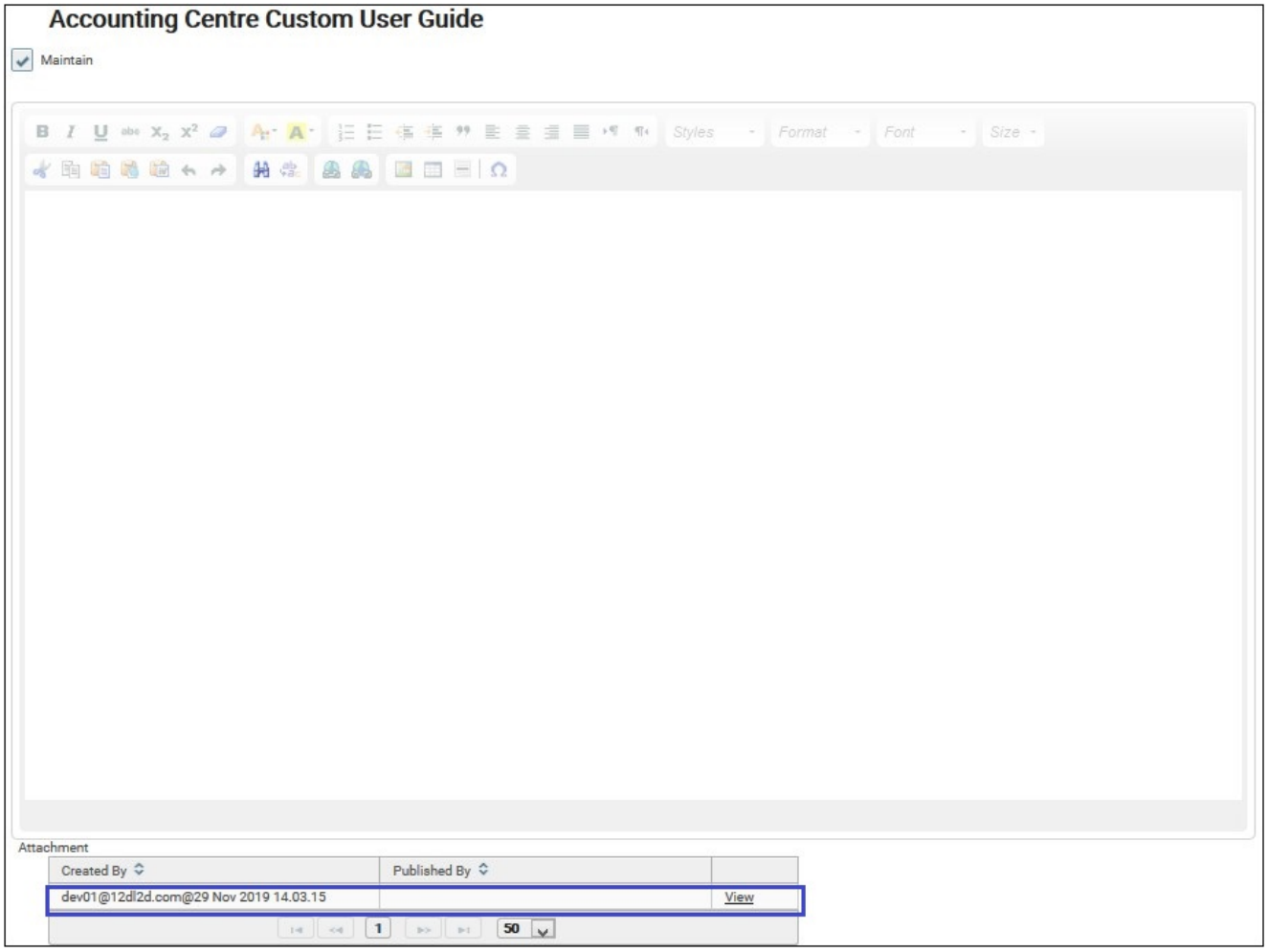
8. A message saying the customised user guide is updated successfully and it is pending to be publish will be displayed.



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.



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.



11. Click View.

12. The contents of the newly created user guide will be displayed in the free text area.

13. Ensure this is the user guide to publish. Then, click Publish.

14. Once published, you will see user guide is published successfully message displayed.



15. The Published By field in the listing at the bottom of the screen will also be updated with the user and date/time when the user guide is published.



FREQUENTLY ASKED QUESTIONS

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

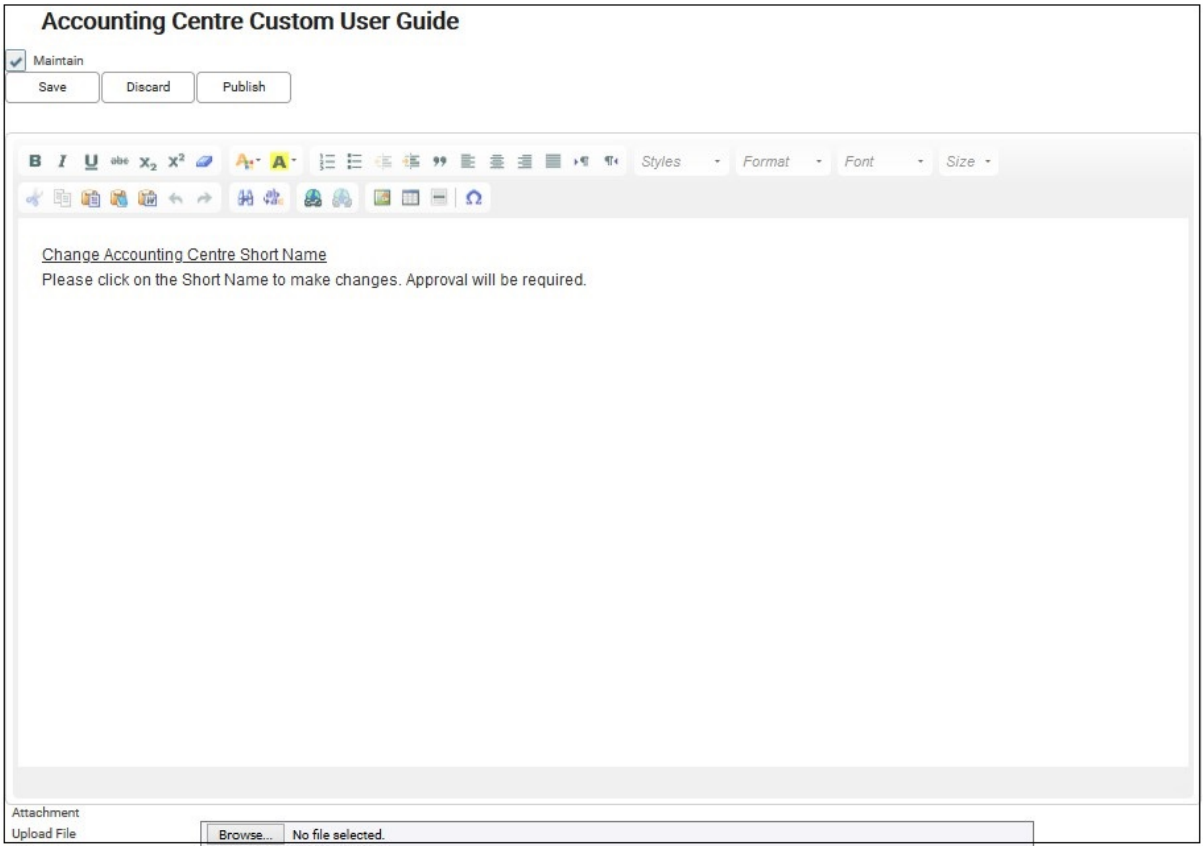
Yes. A saved user guide can be discarded before it is publish. Tick on the Maintain checkbox.



Click on the View for the unpublished user guide

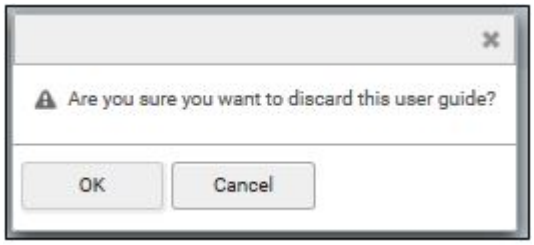


The contents of the user guide displayed on the free text area.



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.