

# CS Lucas Extension Store

## PURPOSE

This document explains the use of CS Lucas Extension Store in CS Lucas system.

## WHY IS THIS IMPORTANT?

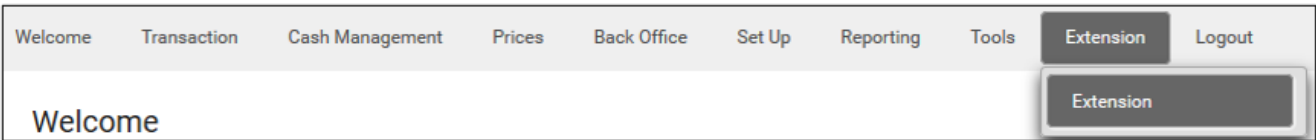
CS Lucas Extension Store is a platform, developed and maintained by CS Lucas, for publishing new user reports, alerts, dashboards, user guides, and tooltips from time to time. Users can browse and download the available user reports, alerts, dashboards, user guides, and tooltips to their environment if they find it useful.

## PROCEDURE

Pre-requisite: To access Extension Store in CS Lucas, the following access rights is required.

<input type="checkbox"/>	Right ID ⇅	Category ⇅	Permission ⇅
<input type="checkbox"/>	18400	Extension Store	Access Extension Store.

1. From the main menu, select Extension > Extension.



2. The screen below displays.

### CS Lucas Extension Store

Category  ▼

Author	Description	Set Up
No records found.		

3. Choose to view the available report/ alert/ dashboard/ user guide/ tooltip from the Category dropdown field.

### CS Lucas Extension Store
















Category  ▼

Author	Description
No records found.	

Report  
Alert  
Dashboard  
Userguide  
Pivot/Chart  
Tooltip


4. In this example, Report will be chosen.

5. Click Refresh. All downloadable reports will be displayed.

CS Lucas Extension Store		
Category	Report	
Refresh		
Author	Description	Set Up
	Chairman Report (Borrow) <a href="#">Specs</a> Chairman Report (Borrow) Version HEAD Author: dev	 
	Outstanding Money Market <a href="#">Specs</a> Outstanding Money Market Version HEAD Author: csucasadmin	
	Investment Trades Revaluation by Security <a href="#">Specs</a> Investment Trades Revaluation by Security Version HEAD Author: CSLUCASADM...	
	Derivative Periodic Rate Reset <a href="#">Specs</a> Derivative Periodic Rate Reset Version HEAD Author: admin	
	Acct Cntr Cash Balance Grouped in Currency <a href="#">Specs</a> Acct Cntr Cash Balance Grouped in Currency Version HEAD Author: csucasadmin	
	Bond Amortisation <a href="#">Specs</a> Bond Amortisation Version HEAD Author: dev	
	Cash and Deposit By Accounting Centre <a href="#">Specs</a> Cash and Deposit By Accounting Centre Version HEAD Author: csucasadmin	

6. Choose which report to download. In this example, Investment Trades Revaluation by Security will be selected.

Note: You can view the design or the report layout by clicking on the Specs beside the report name.

7. Click  to download the report to the system.

8. Once downloaded, click  to assign the report access rights to user group.

### Extension Set Up - Report

Extension Name Investment Trades Revaluation by Security

Short Name\*

Description\*

Category\*  ▼

Access Group
 

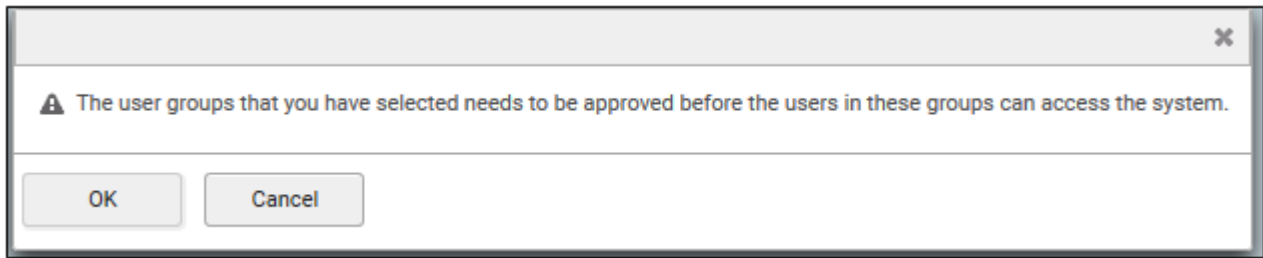
	Shortname
<input type="checkbox"/>	Demo Group
<input type="checkbox"/>	TFS User Group
<input type="checkbox"/>	UAGroup_dev

9. Tick on the checkbox of the user group to assign the access rights for this user report. Multiple user groups can be selected. In this example, Demo Group and UAGroup\_dev will be chosen.

10. Choose the category from the Category dropdown on how you wish the user report to be categorised in the user report listing. The Category field is user definable. This can be created under Set Up > User Definable > Look for User Report Category. For more details on user definable set up, click [here](#).

Note: For dashboard, look for Dashboard Category.

11. When completed, click Save. Note that user groups selected will be disabled until the changes are approved. A popup appears to confirm saving, click OK.



12. To approve the user groups with the new access rights assigned, navigate to Set Up > User and Rights.

13. From the User screen, click Group.

14. Tick the checkbox beside the short name of the user groups to approve.

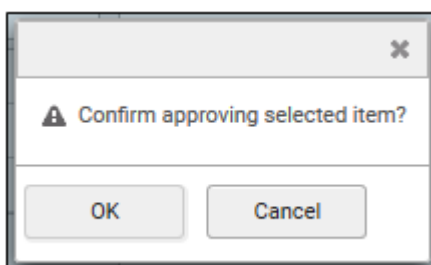
**User Group**

← Refresh New Group Delete Group Approve ↓

	App? ▾	Short Name ▾	Description ▾	Full Rights ▾
<input checked="" type="checkbox"/>	N	<u>Demo Group</u>	Demo Group	
<input checked="" type="checkbox"/>	N	<u>UAGroup_dev</u>	UAGroup_dev	Y
<input type="checkbox"/>		<u>TFS User Group</u>	TFS User Group	Y

1 50 ▾

15. Click Approve. A popup appears to confirm, click OK.



16. Once the user groups are approved, you can now access and print the user report. Navigate to Reporting > User.

Welcome Transaction Cash Management Prices Back Office Set Up **Reporting** Tools Ext

### User Group

	App? ▾	Short Name ▾	Description ▾
<input type="checkbox"/>			
<input type="checkbox"/>			

Standard  
**User**  
Schedule  
Dashboard

17. Click Refresh. The newly downloaded user report from Extension Store will be available for printing.

### User Reports

Category

	Type ▾	Category ▾	Short name ▾	
<input type="checkbox"/>	Query	-	Chairman Report (Borrow)	<a href="#">Configure</a>
<input type="checkbox"/>	Report	-	Investment Trades Revaluation by Security	<a href="#">Configure</a>

## FREQUENTLY ASKED QUESTIONS

## RELATED INFORMATION

## CHANGE HISTORY

Date	By	Changes
14-Sep-2017	Clarissa	Created.
26-Feb-2020	Lyra	Updated Screenshots.