

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.

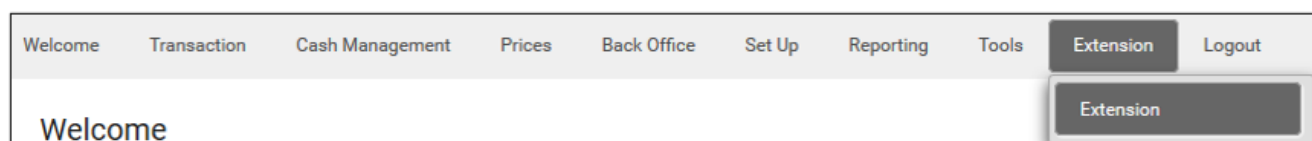
PROCEDURE



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) Specs Chairman Report (Borrow) Version HEAD Author: dev	 
	Outstanding Money Market Specs Outstanding Money Market Version HEAD Author: cslucasadmin	
	Investment Trades Revaluation by Security Specs Investment Trades Revaluation by Security Version HEAD Author: CSLUCASADM...	
	Derivative Periodic Rate Reset Specs Derivative Periodic Rate Reset Version HEAD Author: admin	
	Acct Cntr Cash Balance Grouped in Currency Specs Acct Cntr Cash Balance Grouped in Currency Version HEAD Author: cslucasadmin	
	Bond Amortisation Specs Bond Amortisation Version HEAD Author: dev	
	Cash and Deposit By Accounting Centre Specs Cash and Deposit By Accounting Centre Version HEAD Author: cslucasadmin	

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.

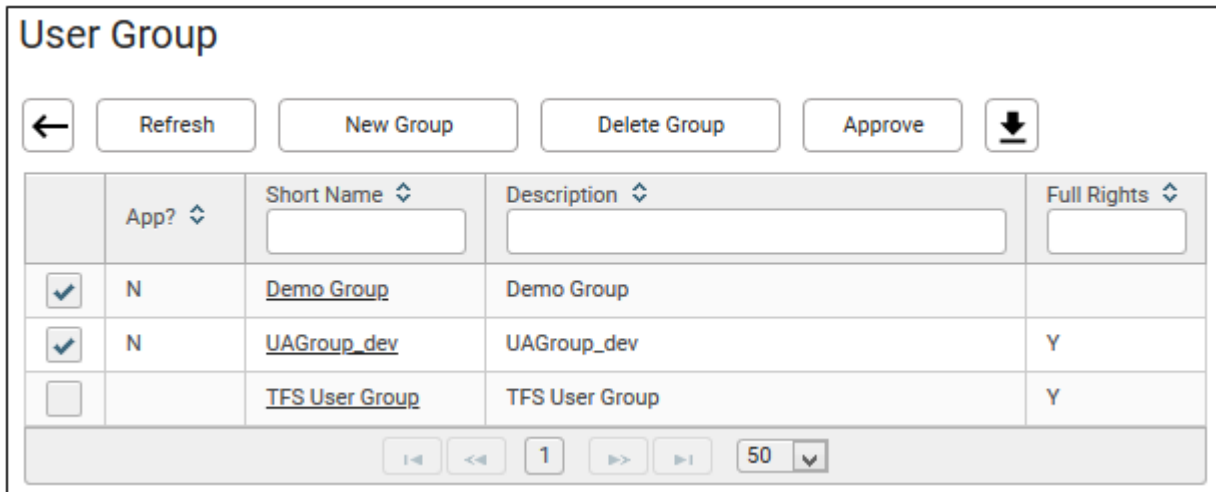
11. When completed, click Save. Note that user groups selected will be disabled until the changes are approved. A popup appears to confirm saving, click OK.

⚠ The user groups that you have selected needs to be approved before the users in these groups can access the system.

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.

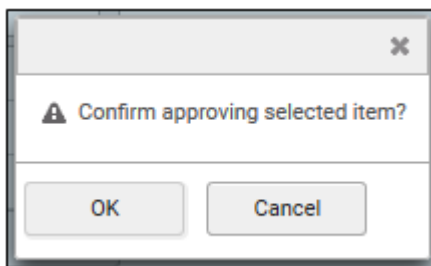
14. Tick the checkbox beside the short name of the user groups to approve.



The screenshot shows the 'User Group' management interface. At the top, there are buttons for navigation (back arrow), 'Refresh', 'New Group', 'Delete Group', 'Approve', and a download icon. Below these is a table with columns: 'App?' (dropdown), 'Short Name' (text input), 'Description' (text input), and 'Full Rights' (dropdown). The table contains three rows: 'Demo Group' (checkbox checked), 'UAGroup_dev' (checkbox checked, Full Rights: Y), and 'TFS User Group' (checkbox unchecked, Full Rights: Y). At the bottom, there are pagination controls showing '1' of 50 items.

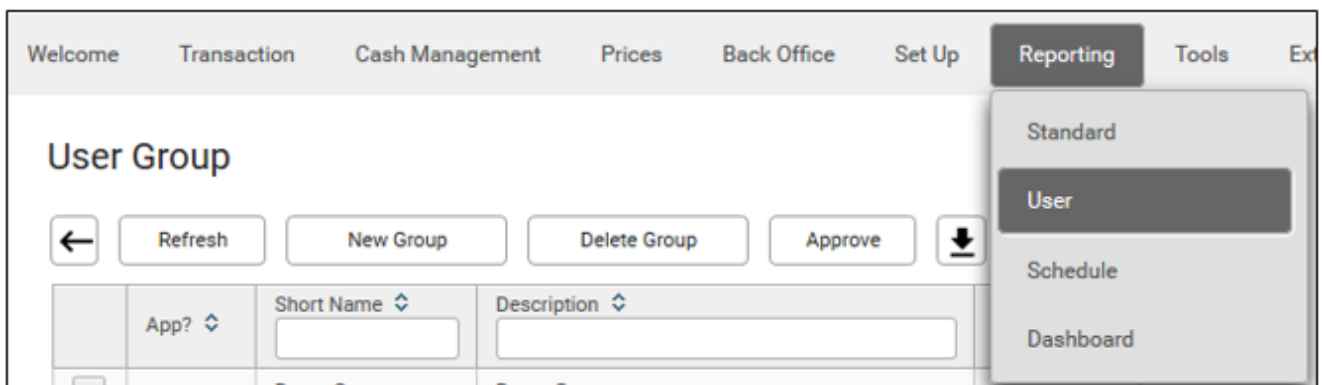
	App? ▾	Short Name ▾	Description ▾	Full Rights ▾
<input checked="" type="checkbox"/>	N	Demo Group	Demo Group	
<input checked="" type="checkbox"/>	N	UAGroup_dev	UAGroup_dev	Y
<input type="checkbox"/>		TFS User Group	TFS User Group	Y

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



The screenshot shows a confirmation dialog box with the title 'Confirm approving selected item?'. It has two buttons: 'OK' and 'Cancel'.

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



The screenshot shows the 'User Group' interface with the 'Reporting' menu open. The menu options are: 'Standard', 'User' (highlighted), 'Schedule', and 'Dashboard'. The background shows the same table as in the previous screenshot.

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

User Reports

Category

-

Refresh

New

Delete

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

FREQUENTLY ASKED QUESTIONS

RELATED INFORMATION

CHANGE HISTORY

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