

Dashboard Preview on Homepage

[See the previous W5 version guide.](#)

PURPOSE

This document describes the procedures on how to set up preview of favourite dashboards on CS Lucas homepage.

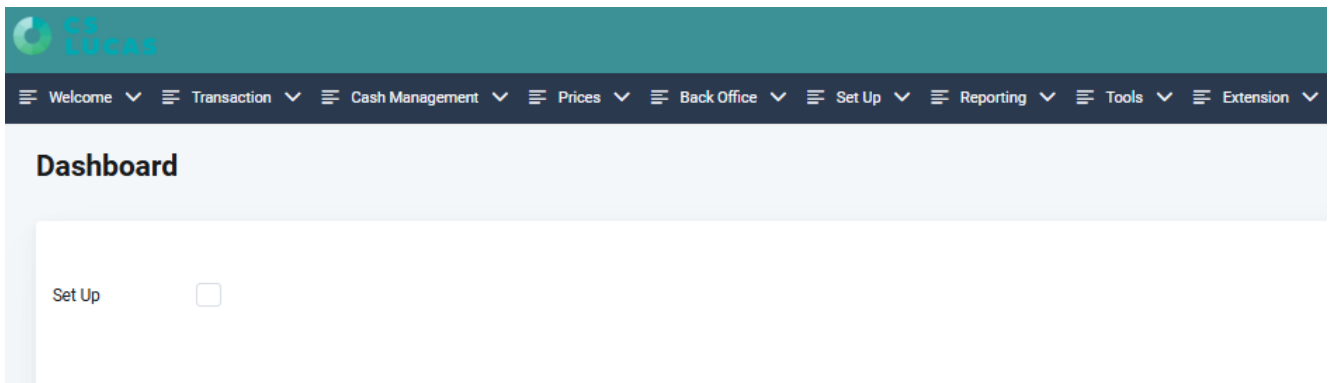
WHY IS THIS IMPORTANT?

This allows to have quick view of favourite dashboards.

PROCEDURE

Pre-requisite: Ensure Dashboard preferences are saved for each dashboard page in Reporting > Dashboard > Dashboard report page before setting up the Dashboard preview on CS Lucas homepage. See FAQ01 for more details.

1. To view favourite dashboards on CS Lucas homepage, tick on Set Up.



2. Select the available dashboards from the drop down list according to how you wish to position it on the homepage. You can view up to four dashboards at a time.

Dashboard

Set Up

☒

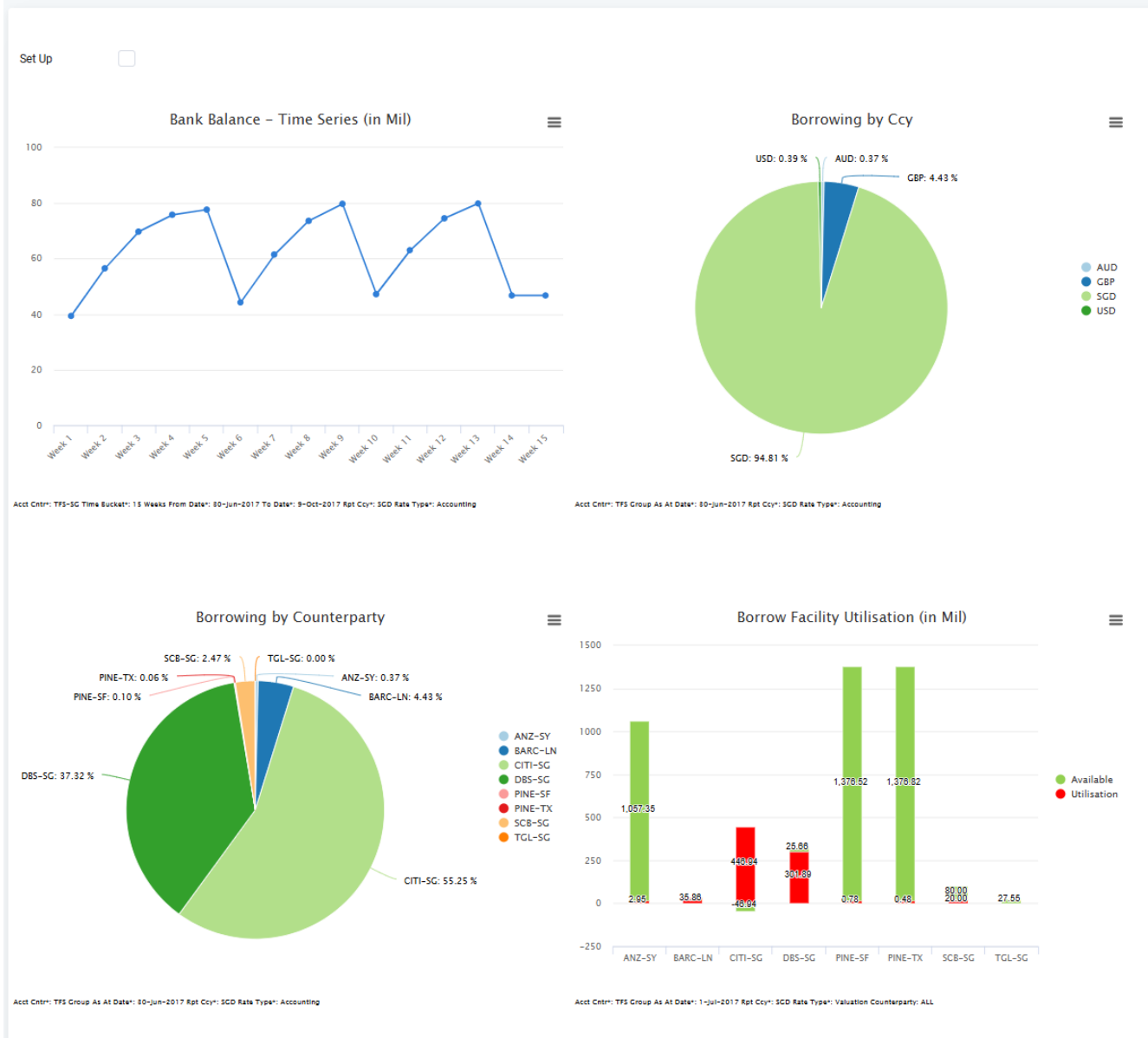
 Save

Position	Dashboard Shortname
Upper Left	Bank Balance - Time Series
Upper Right	Borrowing by Ccy ▼
Lower Left	Borrowing by Counterparty
Lower Right	Borrow Facility Utilisation (i

3. Click Save.

4. The dashboards saved will be displayed on the homepage.

Dashboard



FREQUENTLY ASKED QUESTIONS

FAQ01. I have set up the dashboards to display on homepage. However, it is not displayed. Why?

For Dashboards to be displayed on the homepage, preferences for each dashboard need to be saved in Reporting > Dashboard > Dashboard report page.

For example to view 'Borrowing by Ccy' dashboard on homepage.

First, save report parameters as favourite in Borrowing by Ccy dashboard page.

Borrowing by Ccy

✕ Cancel

📄 View

★



Acct Cntr*

+ TFS Group

As At Date*

30/06/2017

Rpt Ccy*

SGD

Rate Type*

Valuation

Then, select the dashboard in Setup in the home page and click save.

RELATED INFORMATION

[Reporting - Dashboard](#)

CHANGE HISTORY

Date	By	Changes
22-May-2018	TS	Created.
23-May-2018	Anuja	Reformatted. Rewritten.
10-Jul-2018	Silpa	Added Pre-requisite and FAQ01.
15-Jan-2020	Lyra	Updated Screenshots.
24-Feb-2025	Lyra	Updated to W6 instructions and screenshots.