How to Save Favourites

See previous W5 version guide

PURPOSE

This module gives a step-by-step procedure on how you can save commonly used parameter or “favourites” in the CS Lucas system.

WHY IS THIS IMPORTANT?

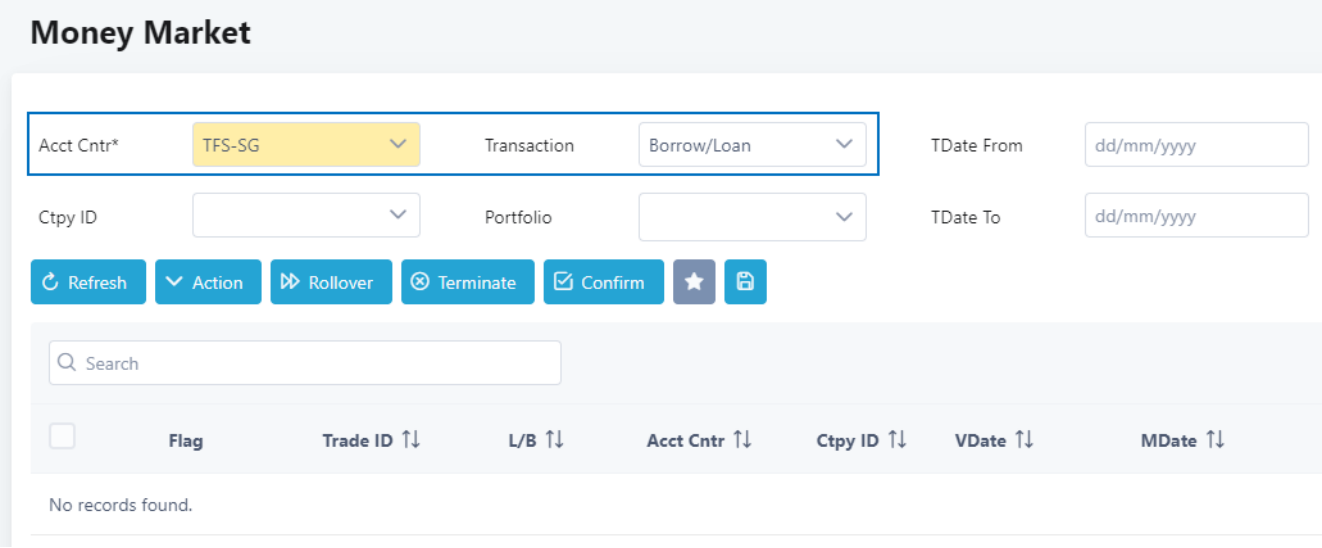
Users may save favourite parameter values so that the system automatically applies these parameters on screens used to perform inquiry and for printing reports. This will save time and reduce errors when performing these tasks.

PROCEDURE

1. Screens that allow user to perform inquiry on transaction details and reports that allow users to save favourites.

2. In the example below, we illustrate how this is done for the Money Market inquiry screen.

3. Let us consider the situation where a user would like to save accounting centre “TFS-SG” and transaction “Borrow” as the parameter. Select the desired accounting centre and transaction, then click the Save Favourite button.



4. When you next login, you can click on the Apply Favourite  button. This will populate the favourites saved for accounting centre and transaction field because we have saved this in the step above.

5. The above step requires you to click on the Apply Favourite  button to populate what was previously saved. If you would like the system to always apply it, you need to make the favourite "sticky." To do this, you need to click twice on the Apply Favourite  button with 10 seconds between the two clicks. The download button will turn  . When you next login, you will see that your preference is automatically applied. No need to press anything else.

6. To remove the "sticky," click on the download button twice with 10 seconds in between clicks. The Apply Favourite button will become  again.

7. Please note that when saving dates, a special situation arises when you save current date as the preference. The system will assume that you would like to apply the system's current date. For example, let's say that today is 15-Feb-2013 and you save this same date as a favourite for VDate. When you next login on another day, say 17-Feb-2013, the system will apply 17-Feb-2013 as the favourite for VDate.

FREQUENTLY ASKED QUESTIONS

RELATED INFORMATION

CHANGE HISTORY

Date	By	Changes
15-Feb-2008	-	Created.
28-Jul-2015	CS	Included section for FAQ.
19-Sep-2015	Clarissa	Changed.
13-Jun-2016	Richard	Proofread.
22-Jul-2016	Clarissa	Changed.
25-Nov-2019	Lyra	Updated screenshots.
13-Jun-2023	TS	Updated to W6 instructions and screenshots.