

Preference Set Up

[See previous W5 version guide](#)

PURPOSE

This document contains the detailed procedures on accessing preference setup for static data.

WHY IS THIS IMPORTANT?

These preferences set up determine how the system would work for certain functions in the system.

PROCEDURE

1. Preference set up can be found in several static data set up.

2. For more details on these preference setup, see below:

- [Entity Preference](#)
- [Counterparty Preference](#)
- [User Preference](#)
- [Portfolio Preference](#)
- [Accounting Centre SSI Preference](#)
- [Accounting Centre SSI Group Preference](#)
- [Counterparty SSI Preference](#)
- [Security Preference](#)
- [Facility Preference](#)
- [Hedging Policy Preference](#)
- [Bloomberg Preference Set Up](#)

FREQUENTLY ASKED QUESTIONS

FAQ01. What values are allowed for updating text and password fields on the Preference page?

The value entered must only contain letters (a-z, A-Z), spaces, numbers (0-9), basic punctuation marks (. , ! ?), square and round brackets ([] ()), and the following special characters: (: @ # % * + - _ = ~ /).

RELATED INFORMATION

CHANGE HISTORY

Date	By	Changes
15-Sep-2017	Clarissa	Created.
23-Apr-2020	TS	Updated Purpose and Procedure.
6-May-2020	TS	Added link to Hedging Policy Preference.
27-Apr-2021	TS	Added Bloomberg Preference Set Up.
28-Oct-2024	TS	Updated to W6 instructions and screenshots.