

Reporting - Dashboard

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

PURPOSE

This document shows the procedure on how to access and print dashboard in CS Lucas system.

WHY IS THIS IMPORTANT?

With the data captured in the system, system can generates or produces any kind of charts that is required for management reporting purposes.

PROCEDURE

Pre-requisite: To access Dashboard in CS Lucas, the following access rights are required.

Right ID ↑↓	Category ↑↓	Assigned Permission ↑↓
70270	Dashboard	Access Dashboard.
70291	Dashboard	Refresh Dashboard.

1. From the Main Menu, select Reporting > Dashboard.

The screenshot shows the CS Lucas Reporting Dashboard. The top navigation bar includes 'Welcome', 'Transaction', 'Cash Management', 'Prices', 'Back Office', 'Set Up', 'Reporting' (selected), 'Tools', and 'Extension'. The 'Reporting' dropdown menu is open, showing options: 'Standard', 'User', 'Schedule', 'Dashboard' (selected), and 'Dynamic'. The main content area is titled 'Welcome' and contains a 'View' section with a 'Alerts and Messages' dropdown. Below this are 'Fr Date' (17/02/2025) and 'To Date' (24/02/2025) input fields, a 'View new only' checkbox (checked), and 'Refresh' and 'Send Box' buttons. A table with columns 'Date/Time', 'By', and 'Subject' is shown, with the message 'No records found.' Below the table is a pagination bar showing '0-0 of 0 records' and a '50' dropdown. At the bottom, a message states 'You have no unread message in the selection'.

2. The Dashboard screen displays.

Dashboard

Refresh

Action

Search

Columns

Chart Type ↑↓	Category ↑↓	Short name ↑↓	
☐ Basic Line	-	Bank Balance - Time Series (in Mil)	Configure
☐ Pie (Percentage)	-	Borrowing by Ccy	Configure
☐ Pie (Percentage)	-	Borrowing by Counterparty	Configure
☐ Stacked Column	-	Loan Position Maturity Profile: By Currency	Configure

1-4 of 4 records

<< < 1 > >>

50

3. If you do not see any chart available in this screen, this is because no chart has been downloaded to the system yet. You can find and download the available charts in CS Lucas Extension Store in the system by clicking on Extension from the main menu > Extension > Select Category as Dashboard. For more details on how to download charts from the Extension Store, see [CS Lucas Extension Store](#).

4. To print the chart from the Dashboard screen, click the short name of the chart desired. For example, Borrowing by Ccy.

Note that access rights is required to print each individual chart. To assign the access rights, go to Set Up > User and Rights > Group > Click on the desired user group > Assign Permission. Choose category: User Designed Report/Dashboard/Pivot Chart and click Refresh. You will see the list of charts access rights.

Borrowing by Ccy

Cancel

View



Acct Cntr*

+ TFS Group



As At Date*

30/06/2017

Rpt Ccy*

SGD



Rate Type*

Valuation



5. Select/ fill in the report parameters as required. Click View. The chart will be displayed.

Borrowing by Ccy

Cancel

View



Acct Cntr*

+ TFS Group



As At Date*

30/06/2017

Rpt Ccy*

SGD

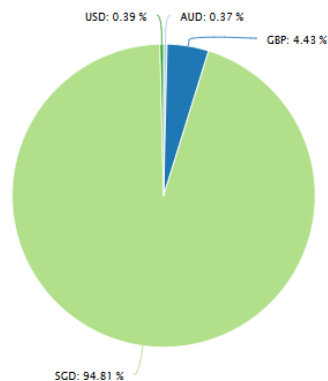


Rate Type*

Valuation

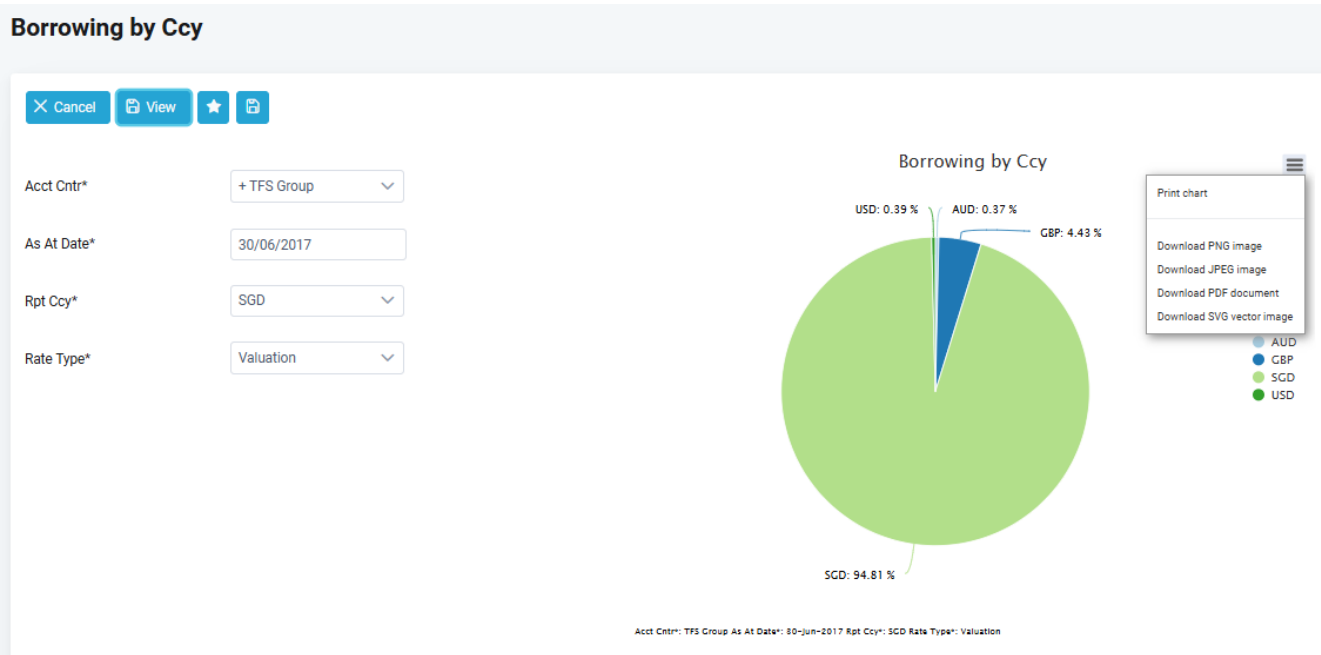


Borrowing by Ccy



Acct Cntr*: TFS Group As At Date*: 30-Jun-2017 Rpt Ccy*: SGD Rate Type*: Valuation

6. On the right side of the chart, you can click on  to print chart or choose to download chart in PNG, JPEG, PDF and SVG vector format. Alternatively, you can also do print screen of the chart from this screen directly.



7. Click Back button to return to Dashboard screen.

FREQUENTLY ASKED QUESTIONS

RELATED INFORMATION

[Dashboard Preview on Homepage](#)

CHANGE HISTORY

Date	By	Changes
14-Sep-2017	Clarissa	Created.
23-May-2018	Anuja	Added user guide link for Dashboard Preview on Homepage under Related Information.
15-Jan-2020	Lyra	Updated Screenshots.
24-Feb-2025	Lyra	Updated to W6 instructions and screenshots.