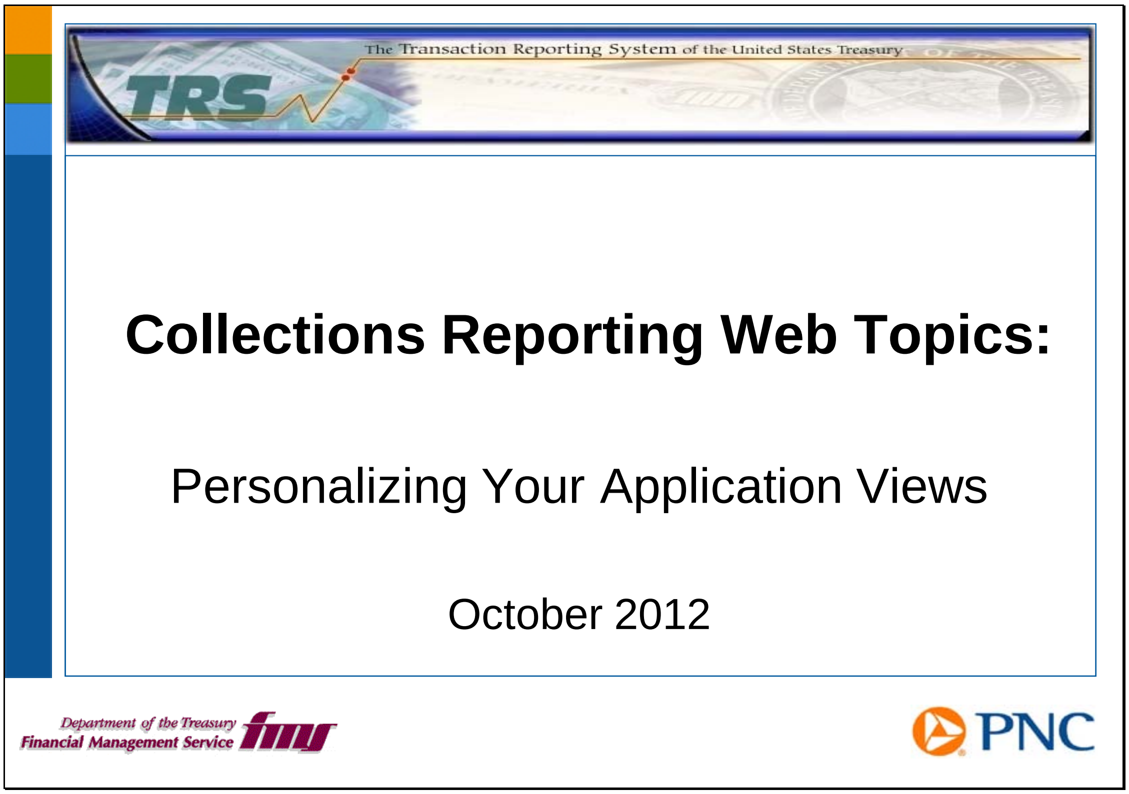
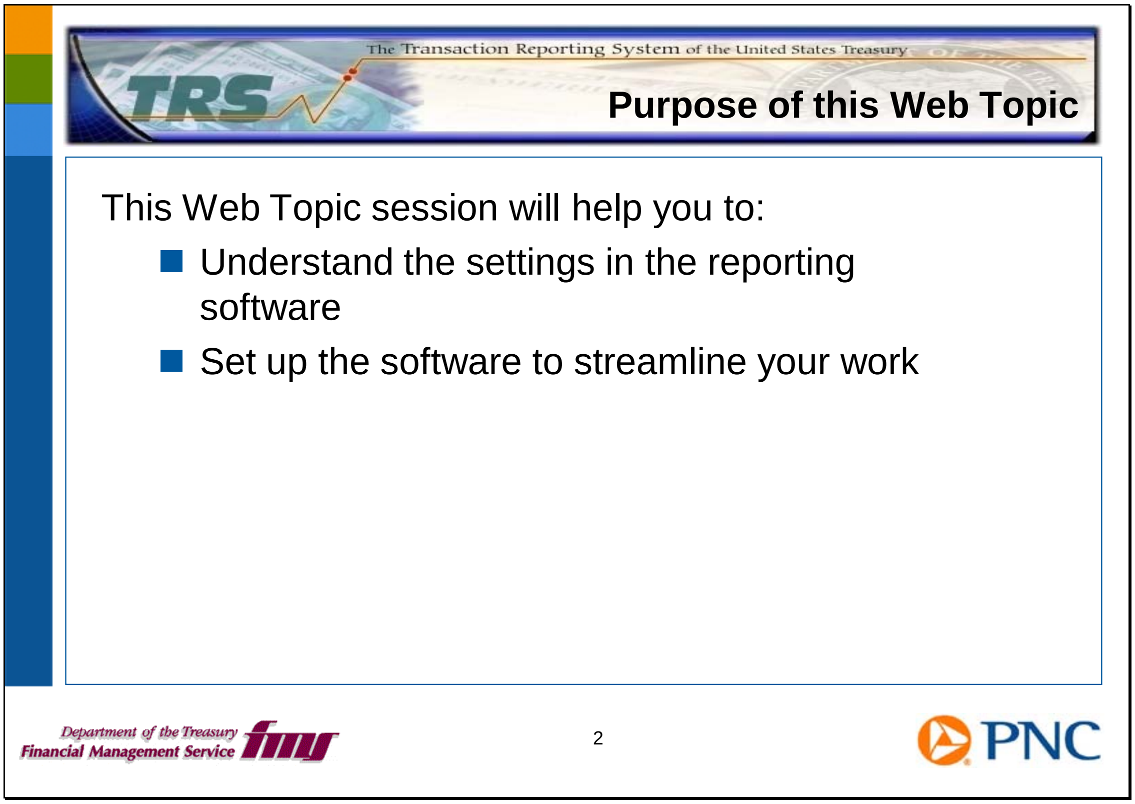
Slide 1



Hello and welcome to this session of Collections Reporting Web Topics. In this session, we will discuss how to personalize the Business Objects software.

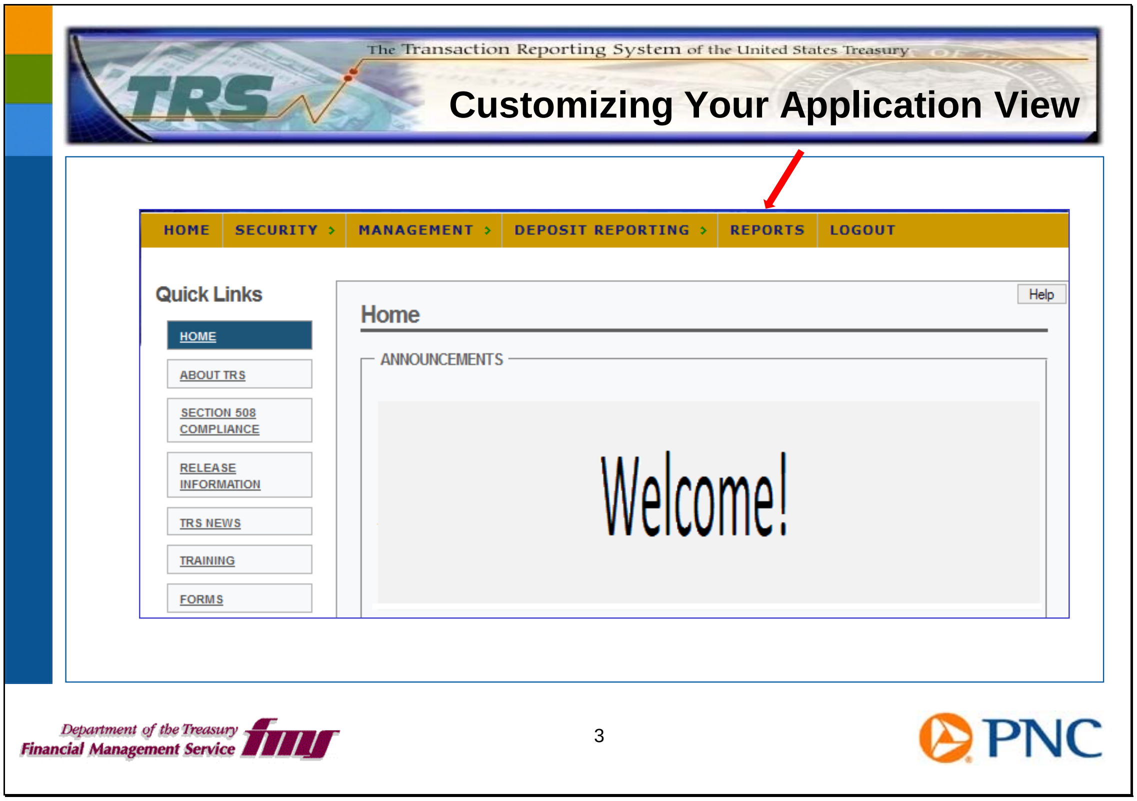
These web topics are intended to supplement the information you will find in the system web-based training (WBT) modules and the online help and reference documents. You will get the most benefit from these web topics if you have already taken the WBTs and are familiar with the online help and reference documents. Before viewing this session, please review the WBTs called *Navigating BO* and *BO Preference Settings.*

Slide 2



This session will help you understand the personal settings available to you in the application. You can define these in order to personalize and streamline how you use the software.

Slide 3

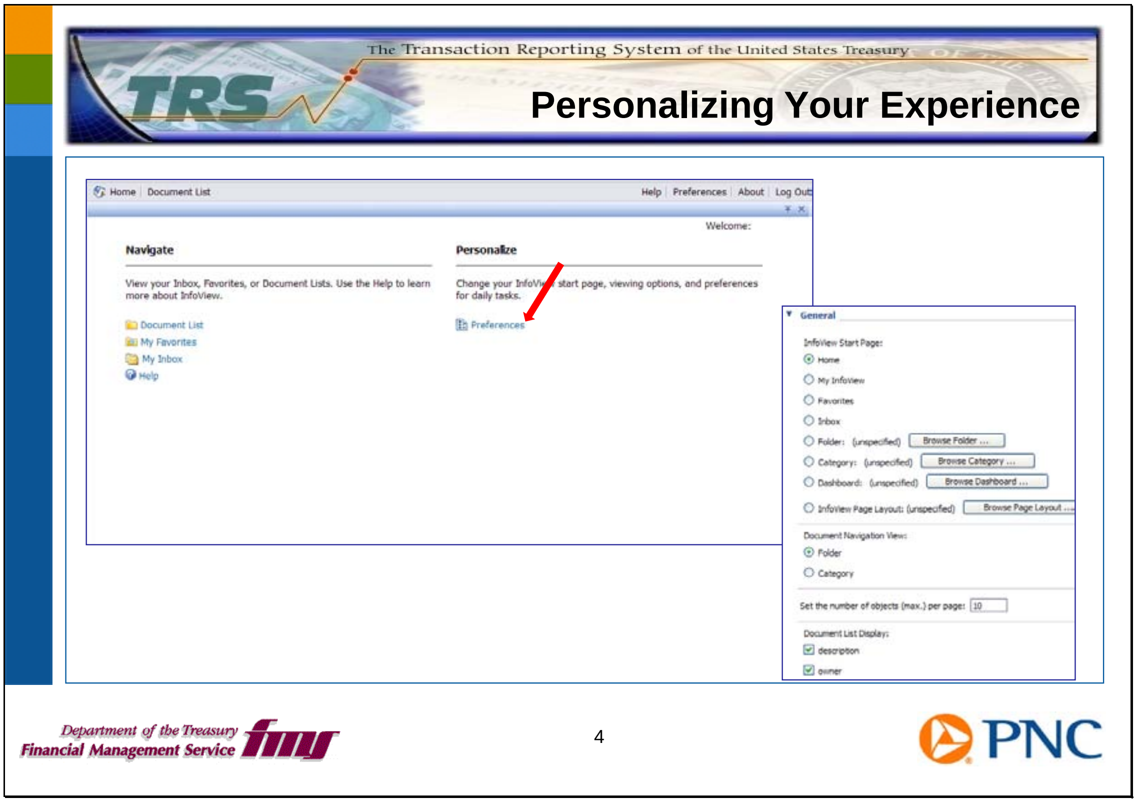


The system is configured using the standard settings of the Business Objects software. Depending on how you use the application, you may want to change these standard settings so you can find your reporting information more quickly.

On the TRS homepage, select the **REPORTS** option from the tool bar.

This will take you to the screen where you may make your customizations.

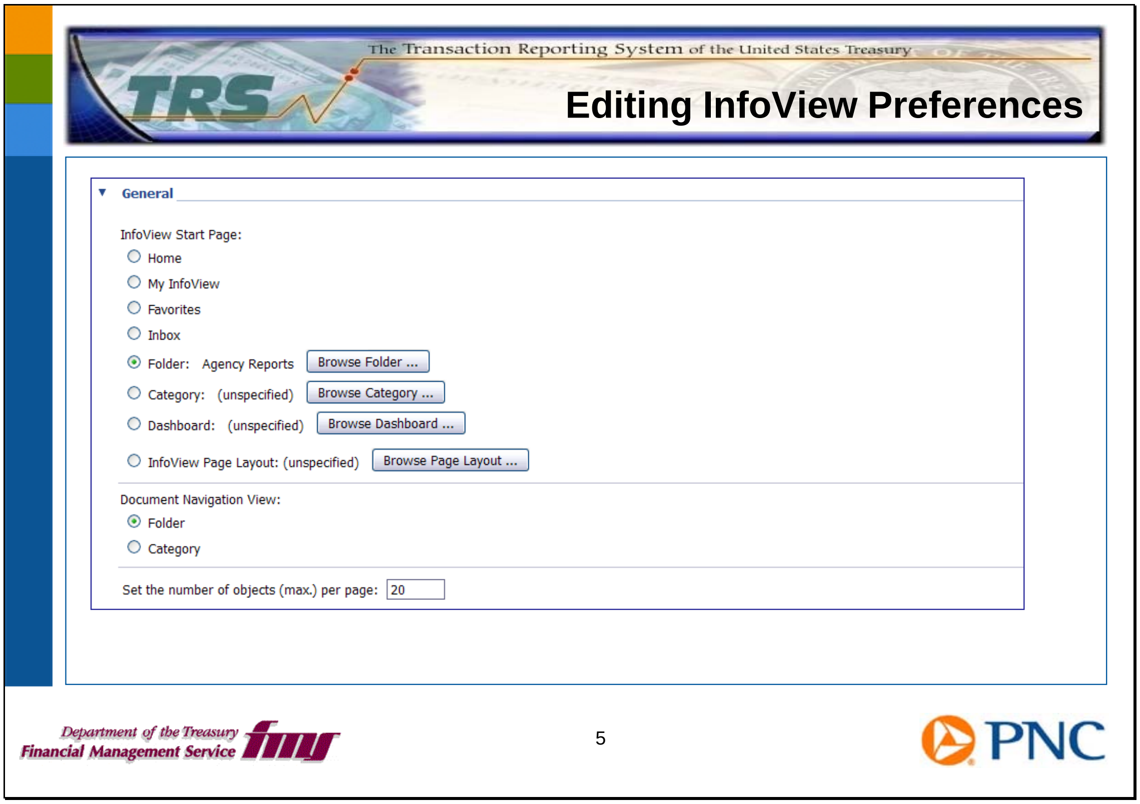
Slide 4



On the Reports Home page, you are presented with options to navigate TRS or to personalize your settings.

Click **Preferences** on the right side of the screen under the **Personalize** heading. You see the Preferences screen.

Slide 5

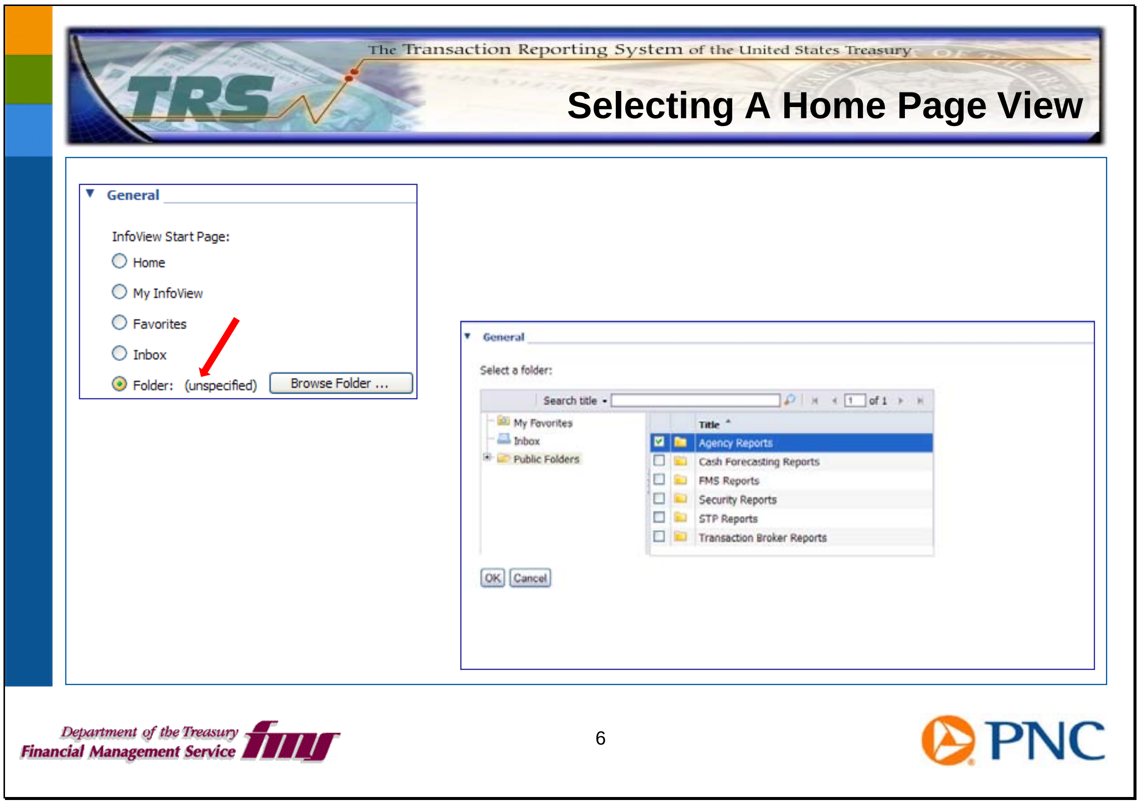


Pictured here are the General InfoView preferences, the first of two sets of fields you may customize.

From this page, you can select the desired view for your Start Page. You may keep the default landing page, or select to land on Favorites, the application Inbox, or a specific folder when you log in to the system and choose the Reports option.

This feature is particularly helpful because it enables you to log in to the application and be presented with the information you want to see first in the format you choose. Let’s look at an example of when you opt to set a folder as your homepage.

Slide 6

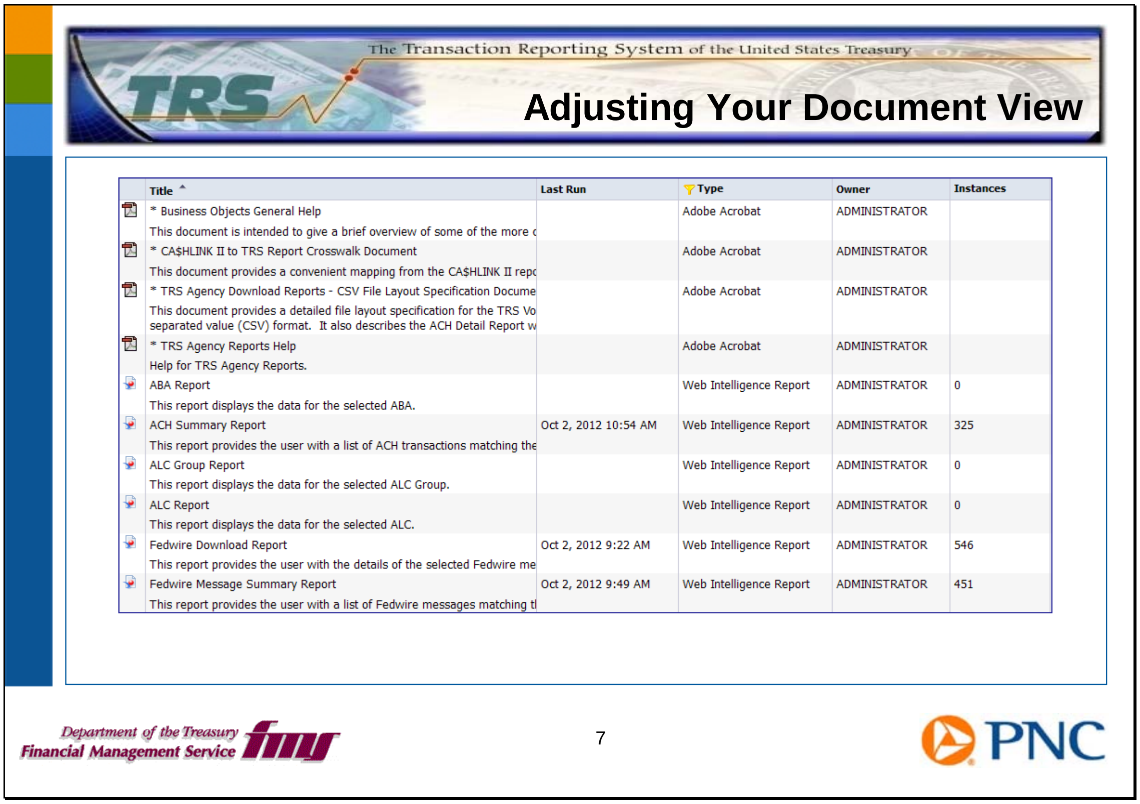


For the purpose of this session, we have elected to set the Agency Reports folder as the start page.

Under InfoView Start Page, click the Folder button, then click the Browse Folder button. You see the list of available folders. To select Agency Folders, simply click OK.

You will then be returned to the Preferences page where you may continue to personalize other options. Click OK at the bottom right of the page to set your selection.

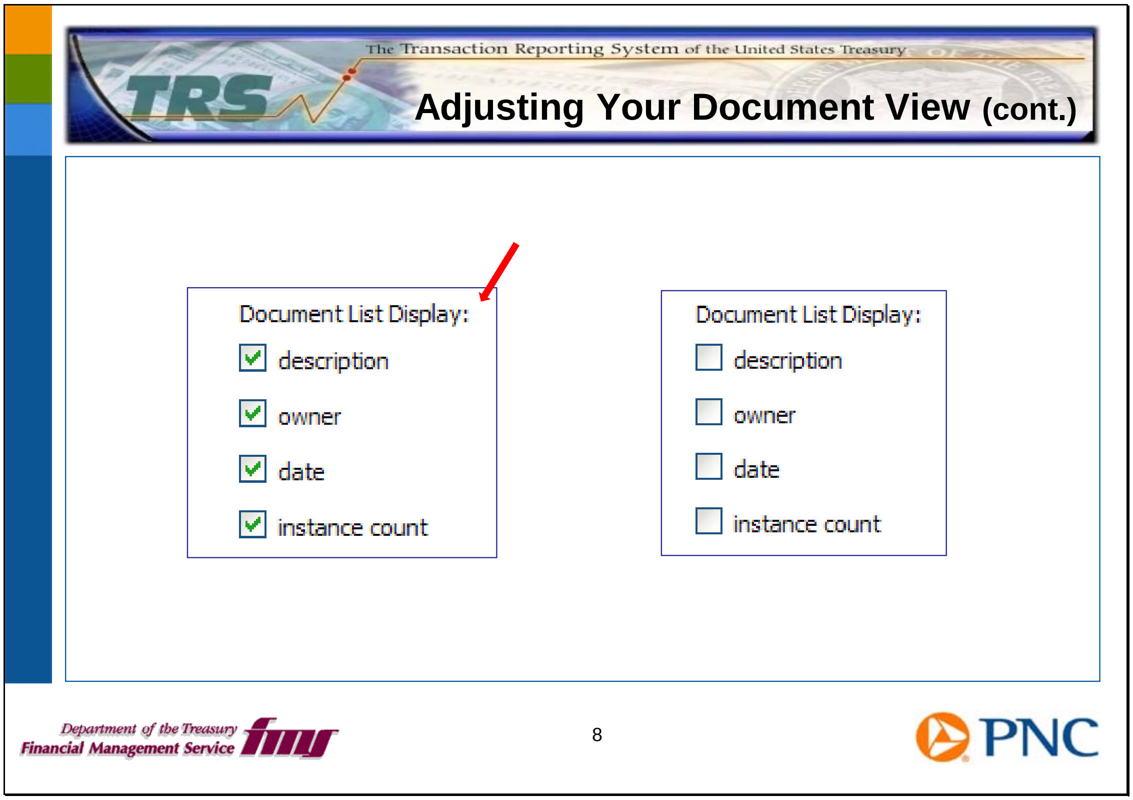
Slide 7



As you can see, the default view of a folder of reports shows reference manuals and the titles of reports you can run. This default view provides a high level of detail for each available document and report, including a description, the type of document, and the owner. For reports, you also see the last time the report was run and the number of instances.

If you do not require this level of detail, you can change the level of detail displayed.

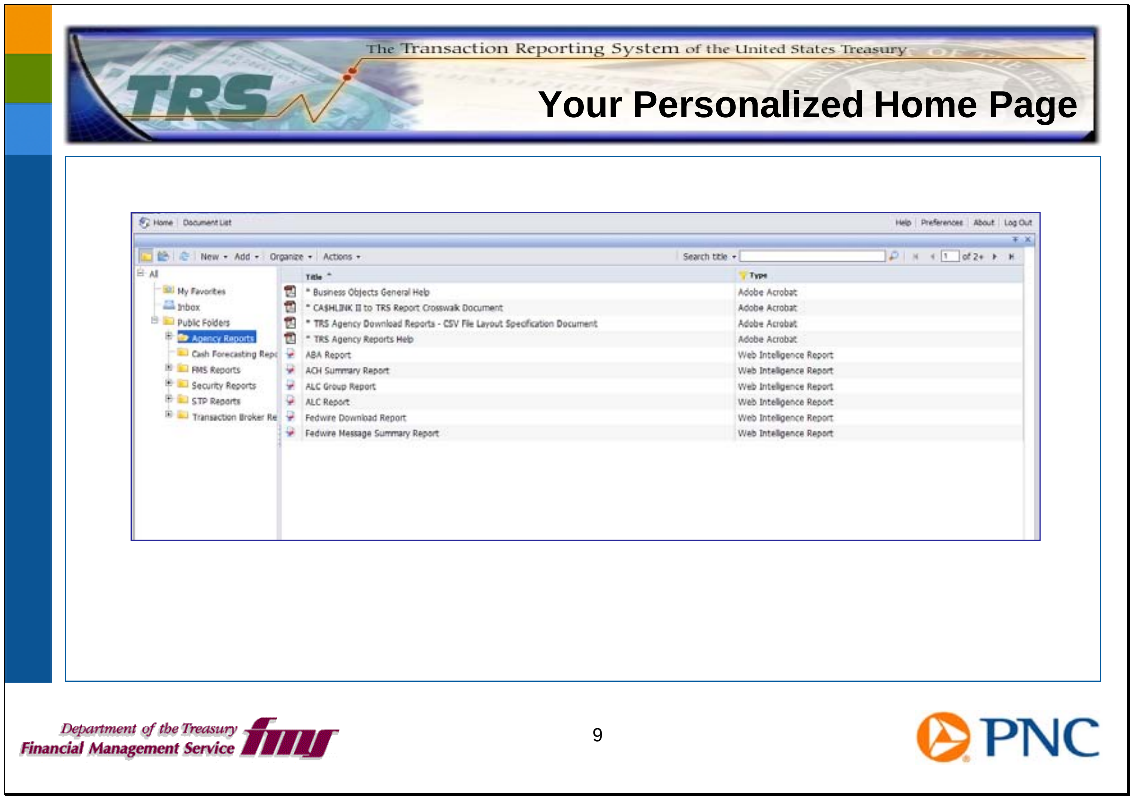
Slide 8



The application allows for the display to be customized in a manner that allows you to see as much or as little detail about a document as you choose.

By default, all selections under the Document List Display in the Preferences screen - noted by the red arrow - are selected. Leaving these selections intact will display all available information for each document. You may uncheck any or all of the selections to adjust how your documents are displayed.

Slide 9

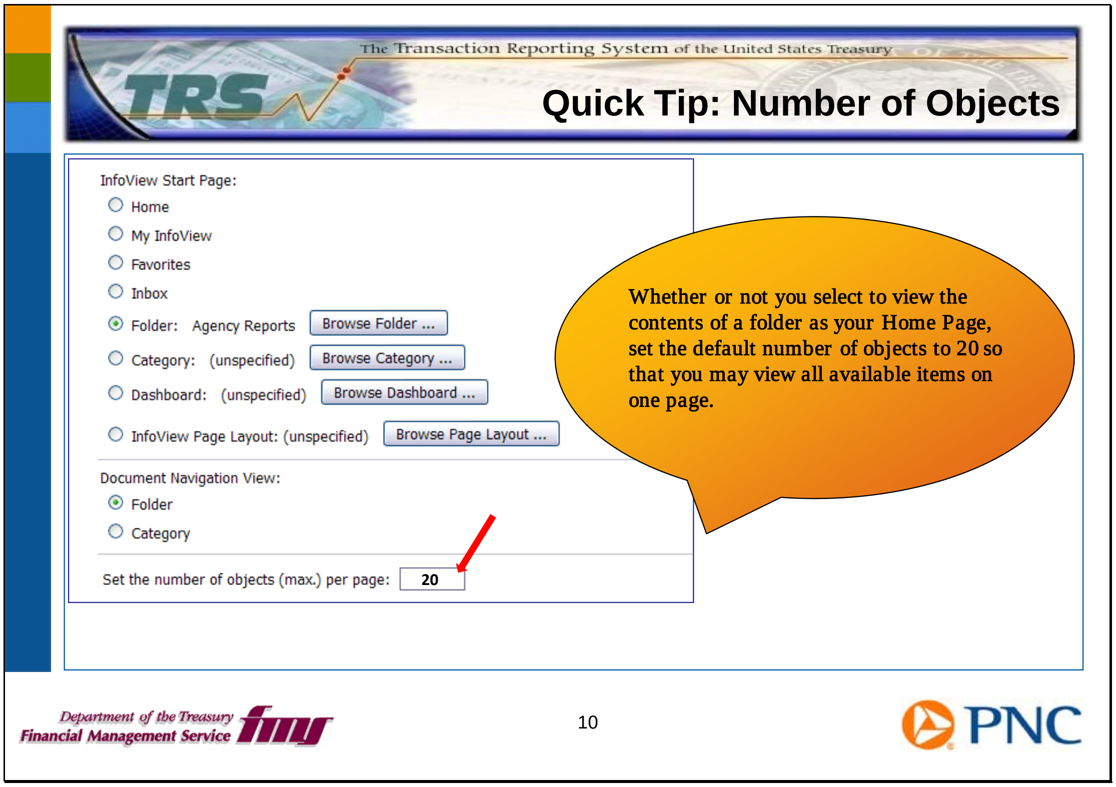


Upon your very next log in and selection of the **REPORTS** option from the gold menu bar, you will immediately be taken to the view you have specified.

Our example results in the display of the Agency Reports folder with the document detail removed as we specified from the personalization menu .

Notice that not all of the Agency reports are displayed in this view, even though there is space below the list of titles. You have to click the arrowhead next to **2+** on the right-hand side of the menu bar to move to the next page of report titles. The next slide explains how to change this.

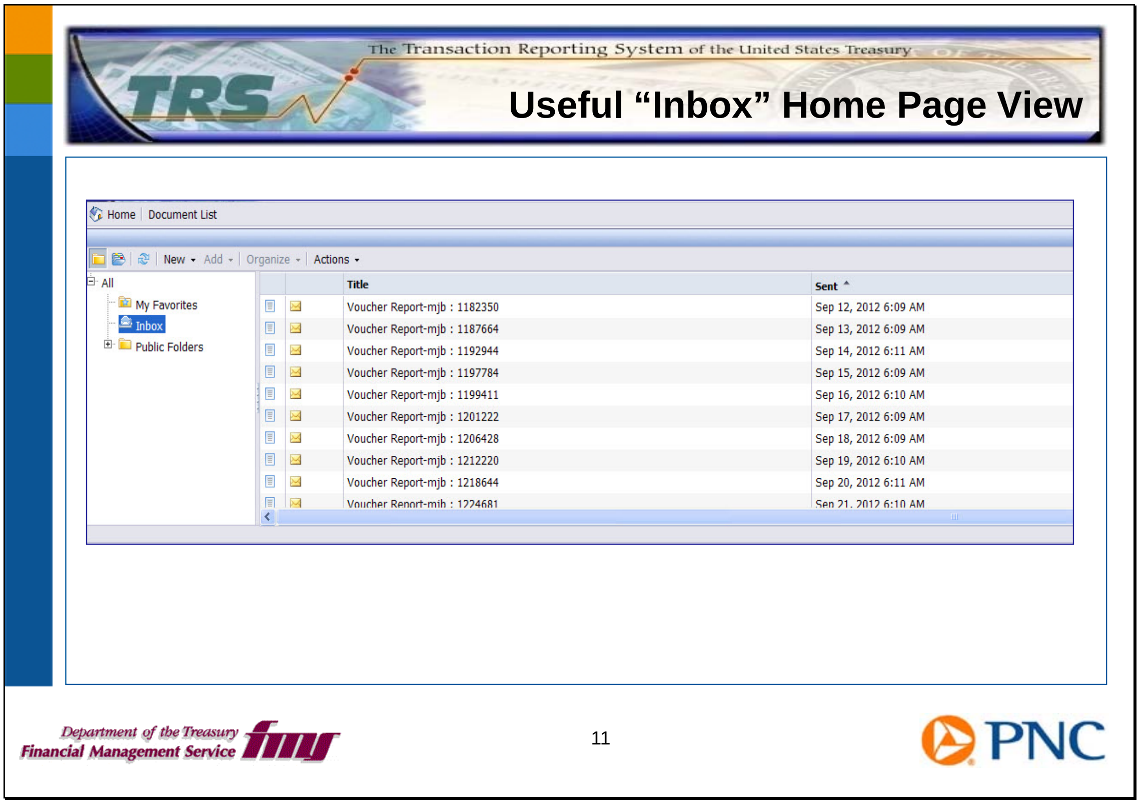
Slide 10



As you will see upon landing on this screen, the default number of objects on a page is set to 10.

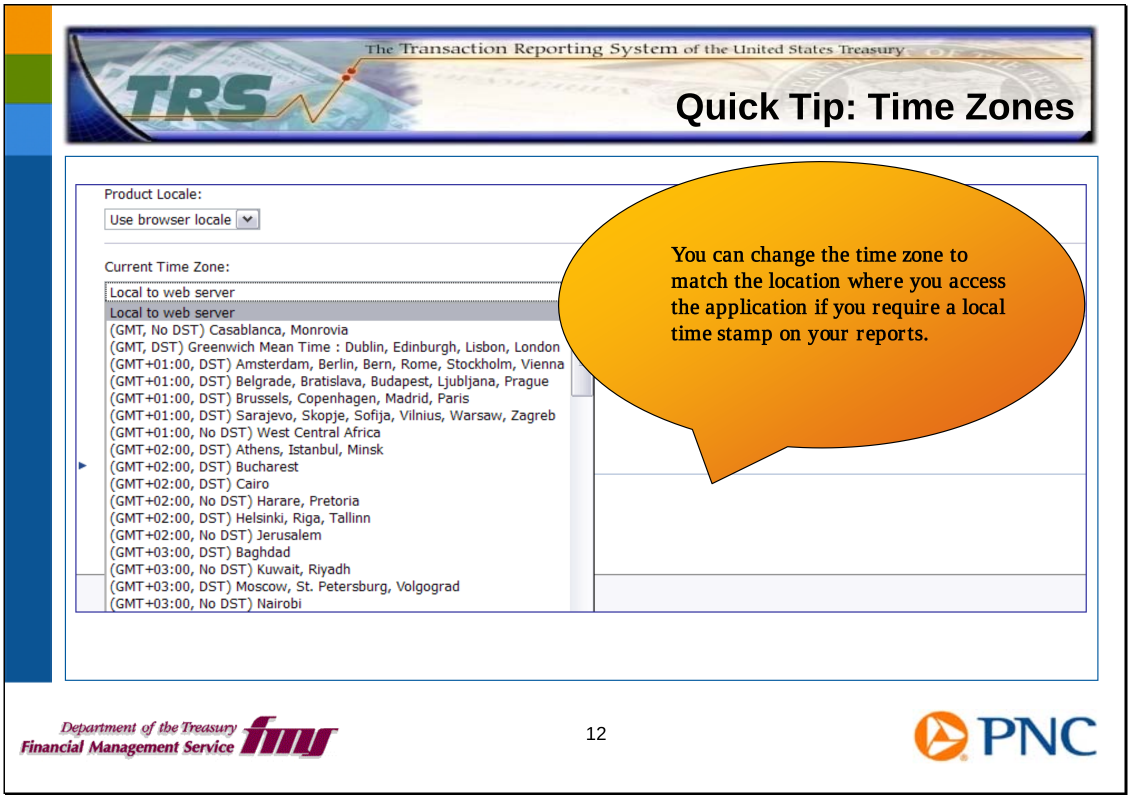
We recommend that you change this setting to 20 so that you will see all the objects in a folder on one page. This way, all available objects in each folder are in view and you will not have to navigate multiple screens.

Slide 11



Depending on how you use the application, you may find it useful to set your home page to land on your application Inbox instead of in a reports folder. If you schedule reports and simply would like to log in to retrieve them, this selection might be most useful for you.

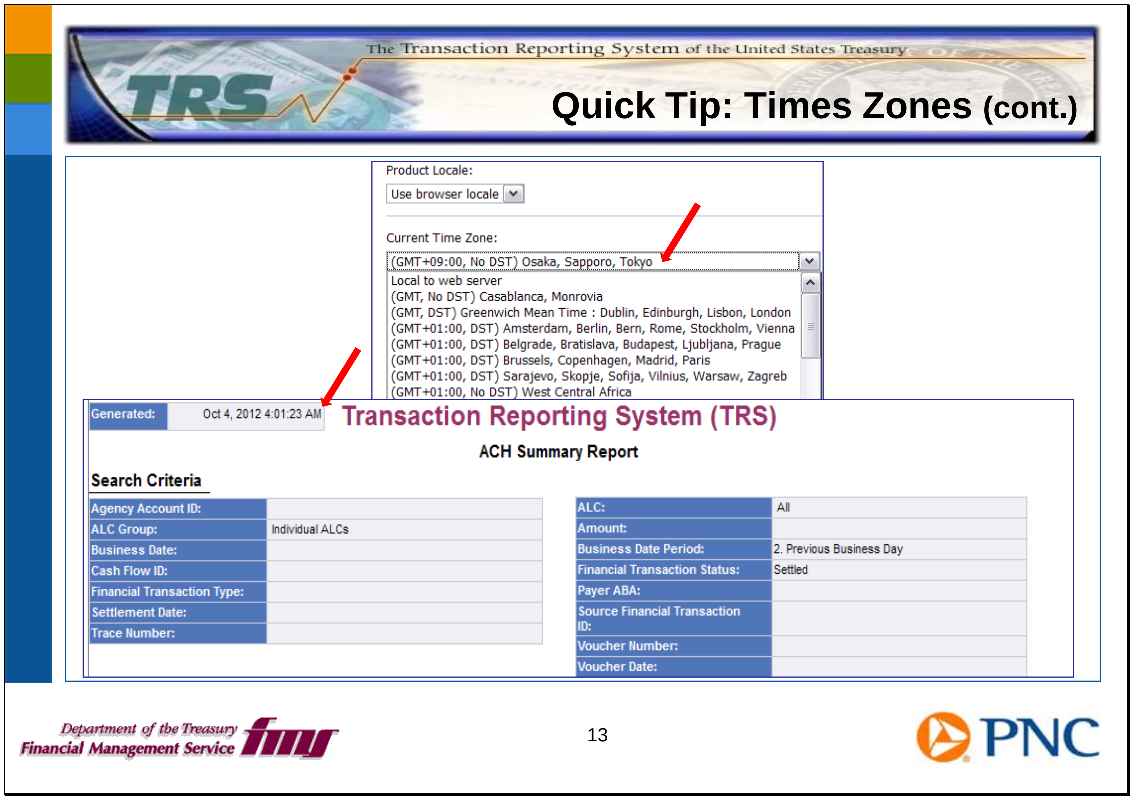
Slide 12



For those users who access the application in a time zone other than Eastern Standard Time (EST), the application allows you to change the time zone setting to your own time zone.

To do this, simply select a time zone from the drop-down option on the Preferences page and then click OK at the bottom right of the screen.

Slide 13



We have selected GMT +09:00, No DST) Osaka, Sapporo, Tokyo as our sample time zone.

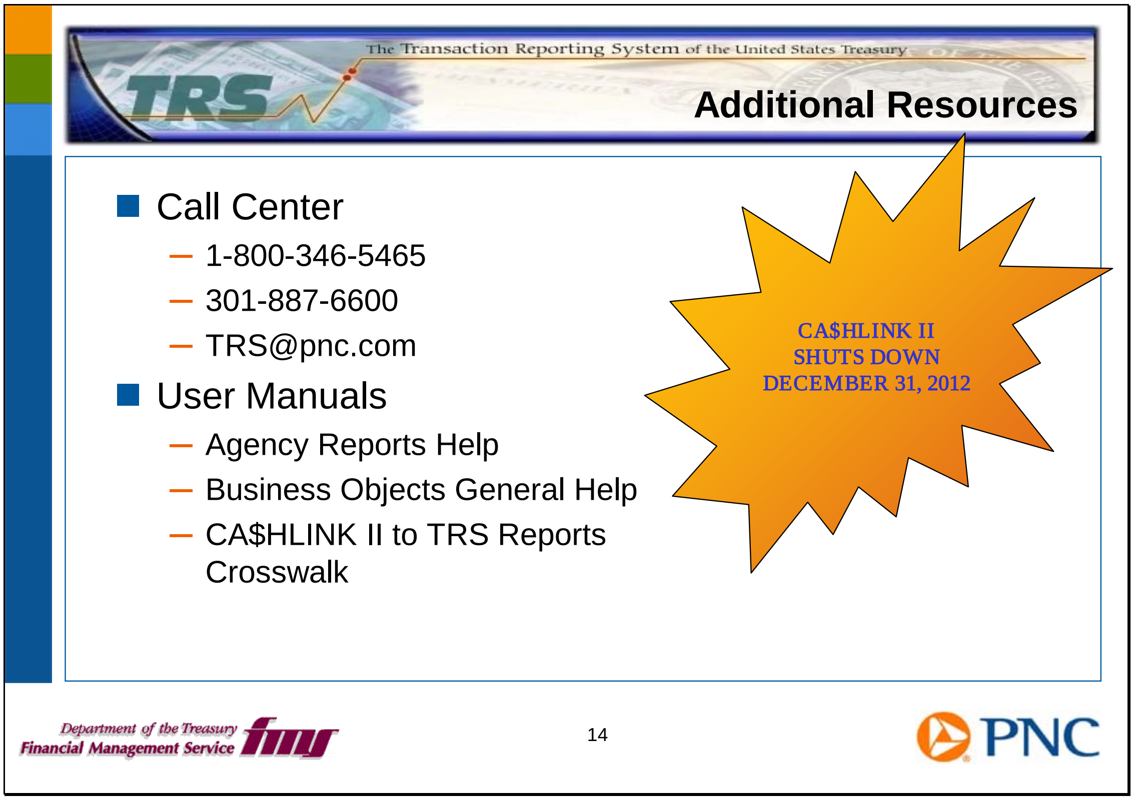
Sign out and then sign back in so that the system registers the change.

We have elected to run the ACH Summary Report.

The actual date and time this example was generated was October 3, 2012 at 3:01 Eastern Standard Time. Notice the date and time in the “Generated” field which appears at the top left of each report. It reflects the current local date and time in Osaka, Sapporo, and Tokyo, Japan, as we specified in the preferences.

This feature is useful if you categorize your reports by the date on which they were generated.

Slide 14



Thank you for viewing this session. We hope you'll take advantage of all the information resources available to you.

Remember, CA$HLINK II is scheduled to be shut down on December 31st, 2012.

We encourage you to send us feedback at TRS@pnc.com.