

Setting User Preferences for CIR Reports

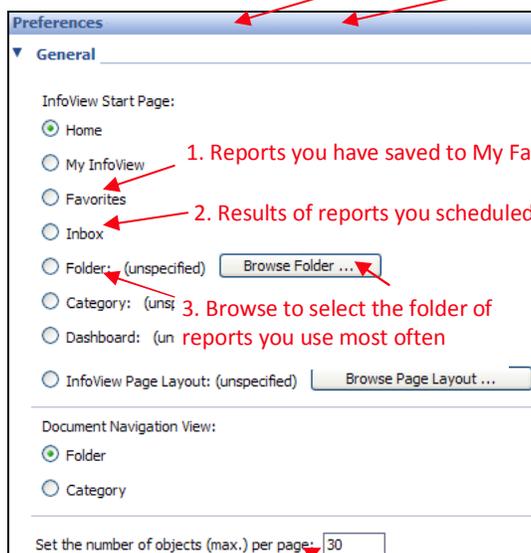
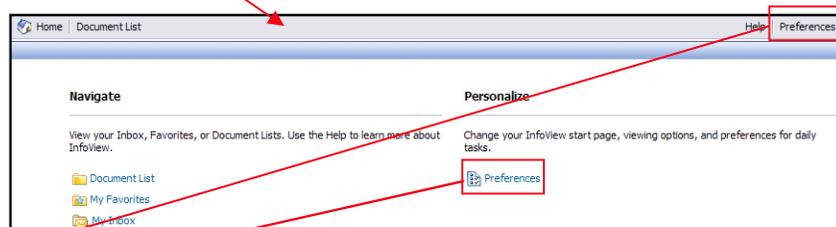
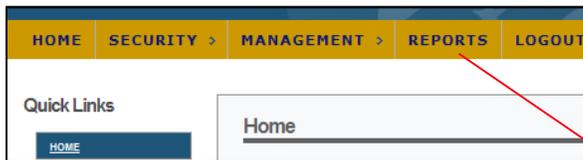
You can customize how you use CIR so that the reports, reference manuals, and other items that you use most frequently appear first. Setting Preferences allows you to specify which page within Business Objects to use as your starting page and how it appears, to turn on Interactive editing, and to specify the time zone of your location.

Preferences are sorted into two groups: **General** and **Web Intelligence**. Within each of these groups, there are several choices that you can set.

Be sure to refer to the manual *Business Objects General Help* for more information about setting preferences. Remember that not all of the choices available in the Business Objects software apply to CIR's implementation of Business Objects.

General Preferences

1. Log in to CIR. Click **Reports** on the gold menu bar to see the Business Objects Home page. On the right side of the title bar or in the Personalize section of the window, click **Preferences**. A new window opens and you see **General Preferences**.



Set to 30 to see all manuals and reports on one page

1. **Favorites**—You can copy the reports you use most frequently to the **My Favorites** folder. You can also modify these saved reports in some ways to meet your agency's needs. For example, you can modify the Voucher Report to sort by Voucher Number. By choosing **Favorites** as your preferred start page, you see the reports you have saved to the **My Favorites** folder first when you choose **Reports** from the gold menu bar.
2. **Inbox**—You can schedule the reports you need on a recurring basis, such as a daily Voucher Report. Scheduled reports are delivered to your CIR Inbox. Choose **Inbox** as your preferred start page to go to the CIR Inbox first.
3. **Folder**—You can specify the folder of standard reports that you use most often as your start page.

General Preferences (cont.)

Title ^	Last Run	Type	Owner
* Agency Reports Help		Adobe Acrobat	ADMINISTRATOR
Help for CIR Agency Reports			
* Business Objects General Help		Adobe Acrobat	ADMINISTRATOR
This document is intended to give a brief overview of			
* CASHLINK II to CIR Report Crosswalk Document			ADMINISTRATOR
This document provides a convenient mapping from th			
* CIR Agency Download Reports - CSV File Layout Spe			ADMINISTRATOR
This document provides a detailed file layout specif			
separated value (CSV) format. It also describes the ACH Detail Report when saved			
* CL II Account Type to CIR Collection System-Subsystem		Adobe Acrobat	ADMINISTRATOR
This document provides a mapping of the CASHLINK II Account Types to the CIR			
ABA Report		Web Intelligence Report	ADMINISTRATOR
This report displays the data for the selected ABA.			
ACH Summary Report	Aug 12, 2013 9:08 AM	Web Intelligence Report	ADMINISTRATOR
This report provides the user with a list of ACH transac			

Default folder view with details for each document and report

Uncheck these items to simplify the display within the folder

Document List Display:

description

owner

date

instance count

Title ^	Type
* Agency Reports Help	Adobe Acrobat
* Business Objects General Help	Adobe Acrobat
* CASHLINK II to CIR Report Cros	Adobe Acrobat
* CIR Agency Download Reports -	Adobe Acrobat
* CL II Account Type to CIR Colle	Adobe Acrobat
ABA Report	Web Intelligence Report
ACH Summary Report	Web Intelligence Report
ALC Group Report	Web Intelligence Report
ALC Report	Web Intelligence Report

Simplified folder view with fewer details

Choose your time zone to show your local time on your reports

Current Time Zone:

(GMT-05:00, DST) Eastern Time (US & Canada)

Web Intelligence Preferences

2. Scroll down farther on the Preferences page. Click the arrowhead to the left of **Web Intelligence** to open these options.

Remember that not all options apply to CIR's implementation of the Business Objects software.

Web Intelligence

Select a default view format:

Web (no downloading required)

Interactive (no downloading required)

PDF (Adobe AcrobatReader required)

When viewing a document:

Use the document locale to format th

Use my preferred viewing locale to fo

Select a default creation/editing tool:

Advanced (Java 2 required)

Interactive (no downloading required)

Desktop (Web Intelligence Rich Client required)

Web Accessibility (508 Compliant)

Select a default Universe:

No default universe

Choose **Interactive** if you want to change the sort order or make other edits to your copies of standard reports

Using B.O.'s Interactive mode allows you to make certain changes to your personal copies of standard reports. For example, to change the sort order of a report, make a copy of the report and put it in the My Favorites folder.

1. Right-click in the column you want to use as the sort.
2. Choose **Sort** from the menu, then **Remove Sorts**.
3. Right-click again, choose **Sort**.
4. Choose **Ascending** or **Descending** sort.

Not all fields in all reports can be used as sort options.

Do not change any other Web Intelligence preferences.



To learn more about setting preferences, refer to these resources:

- *Business Objects General Help* (CIR reference manual)
 - Personalizing BO
- CIR Web-Based Training
 - BO Preference Settings