

Customizing Your Report

An investment of time to customize an OBI report is time well spent. Customizations enable you to format the report to your needs and to determine the columns that best suit your analysis needs.

TIP: Please see *Quick Guide - Customizing Reports* for detailed instructions.

Before Starting

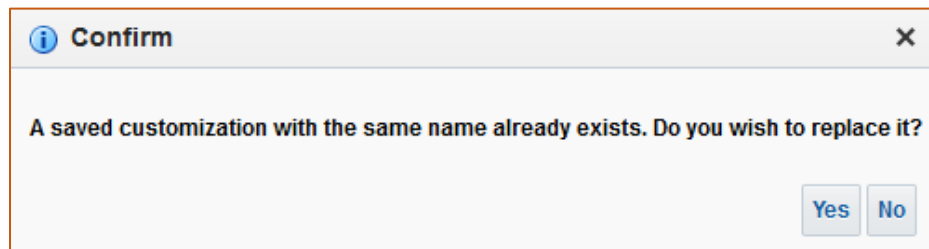
Before starting your customization, run the report with very simple parameters, e.g., one PTA and Current Period or one Assignment Number and one Pay Period.

- Each change you make, e.g., excluding a column, will rerun the report.

Save Often as You Go Along

After the report runs and before you start customizing, save the customization.

- If access.caltech or OBI time out, you will lose the work you have done since the last save.
- Choose a generic name (for example, *Template*).
 - ✓ Each time you save with the same name you will be asked to confirm that you want to replace the customization with the same name.



- Once you have completed your customization of the report you can then save other versions with specific parameters.

Make *Default* Customization Simple

You are only able to choose a saved customization after you first run the report. However, one of your customizations can be saved as your *Default*. Choose the version that you either run the most or has the simplest of parameters so it runs quickly when you first open the report.