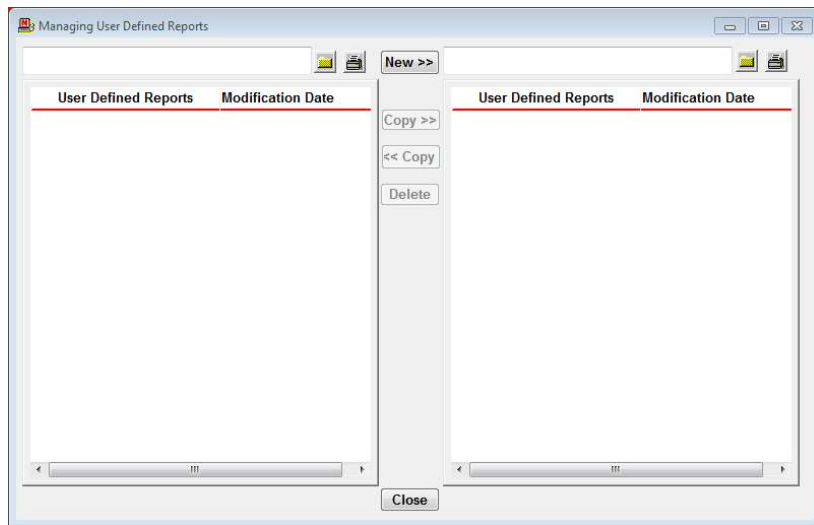




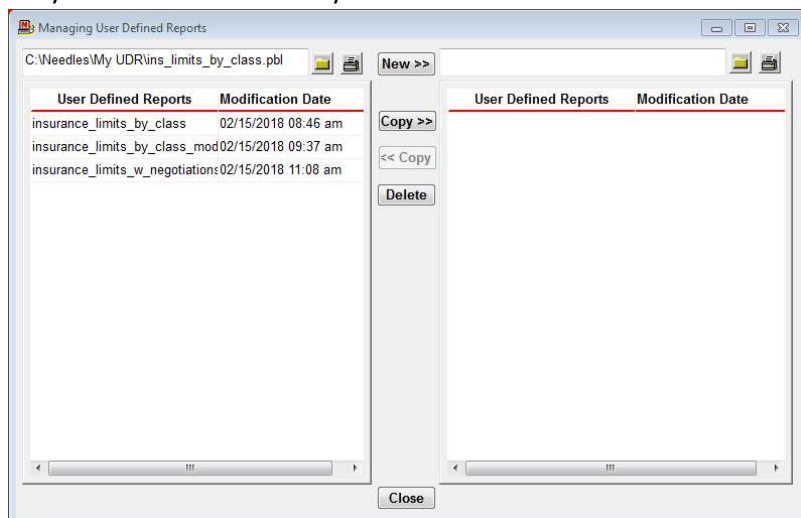
Using the Manage Libraries Tool to Create .pbl Files

You will need to provide a .pbl file that contains your report in order for Needles to rewrite it. Since many Firms have multiple .pbl files that contain their critical reports, the instructions below will assist in the creation of one .pbl file. Please be mindful that each Request is for one report only, so this step may need to be repeated if you are requesting multiple reports.

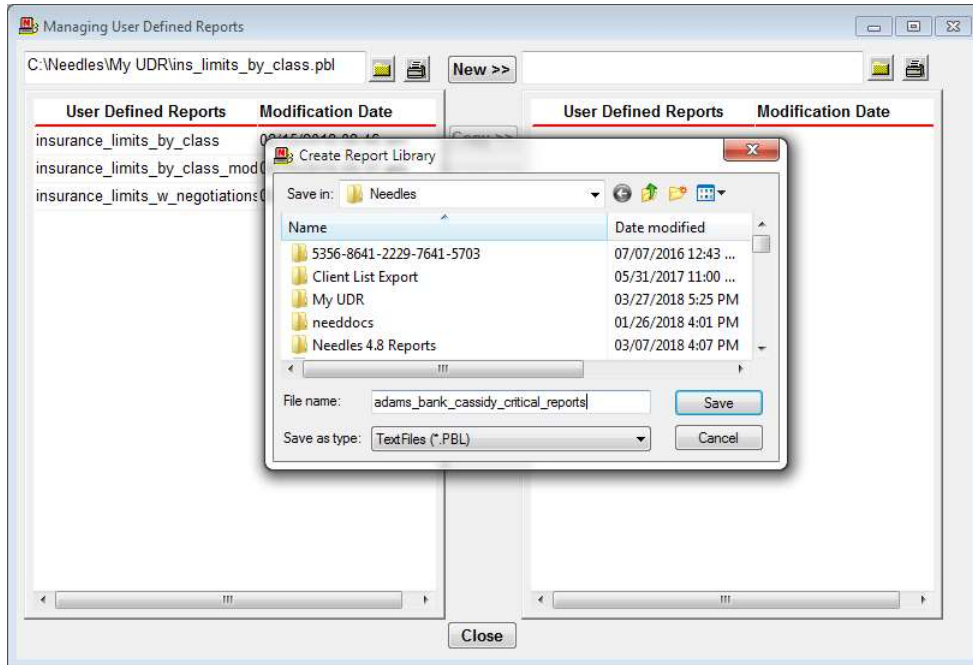
- 1) Create a folder on your Shared Drive to in which to save the new .pbl file. Name the folder: *<Insert your Firm Name> Critical Reports*. Example: Adams, Banks & Cassidy Critical Reports.
- 2) In Needles, Go to Report > User Defined Report > Manage Libraries. The following window will open:



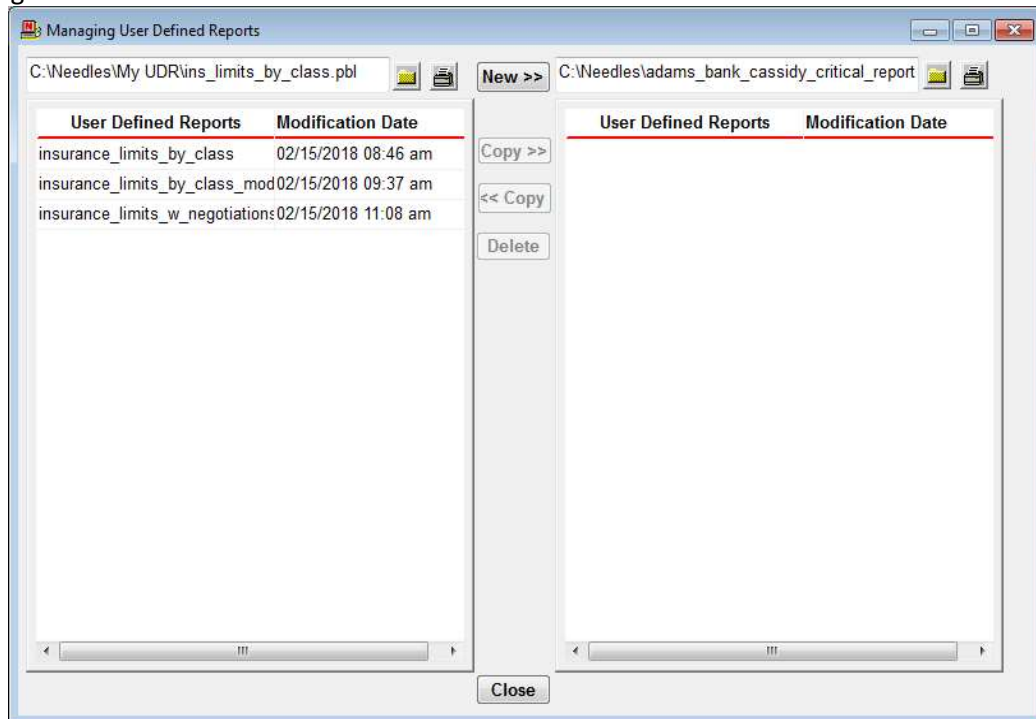
- 3) In the left hand pane, click the folder button to browse to a location on your network that contains the User Defined Report .pbl that you would like to modify.



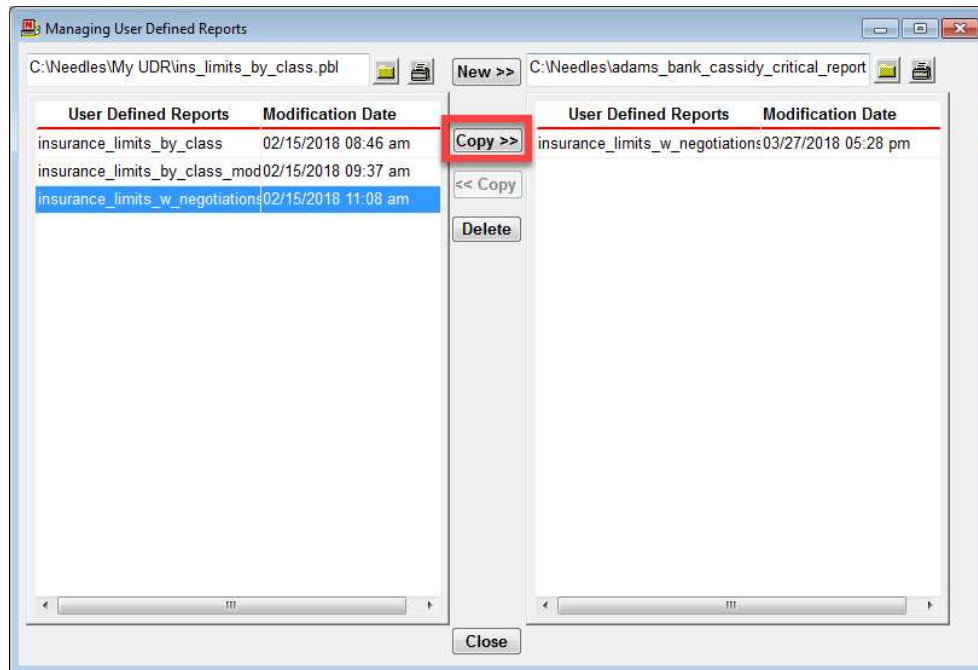
- 4) In the right hand pane, create a new .pbl for the 4.x Report that you wish to modify. Click on the 'New >>' button. Browse to the folder that you created in Step 1. In the File Name box, type the name for your new .pbl: <Insert your Firm Name>_Name_of_Report. NOTE: Use underscores between each word in the name of the file. Example: Adams_Banks_Cassidy_Critical_Reports. Once the .pbl has been created, it will display in the file name on the right hand pane.



Your Manage Libraries will now look like this:



5) To move your report into the new .pbl, click the name of the report in the left-hand pane, then click 'Copy >>'.



6) Close the Manage Library tool once you have moved the User Defined Report to the new .pbl