



infoAdvantage Interactive Reporting

Participant Guide

Version 2.3

The State of Arizona General Accounting Offices wishes to thank the following subject matter experts for providing information for and assistance with this content:

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What can I expect from this course?

The *infoAdvantage Interactive Reporting* class can be located on the TraCorp training site as a Computer Based Training (CBT). This training will be required for new users in order to gain access to the infoAdvantage system and is a pre-requisite for the infoAdvantage Report Developer course.

Users may log in to the training platform at <https://adoa.server.tracorp.com/novusii/application/login/>

Sign in with your Username (your Employee ID Number) and your password.

Click on “Library”, then under Filter By, click on “Online Training”.

Then, search for “infoAdvantage”.

Next, click the down arrow on “Interactive Reporting: InfoAdvantage”.

Select “Assign and Launch” to begin the course

COURSE GOAL AND OBJECTIVES

As a result of this CBT, Interactive users will be able to run On Demand/Interactive reports in infoAdvantage to retrieve financial data that supports department’s business.

Trainees will be able to:

- Select the best report to meet the need by searching within infoAdvantage
- Consistently run reports that retrieve essential data
- Export and print reports
- Save and schedule reports for future use and retrieve them when needed.
- List the steps required to request a custom report

AGENDA AND TOPICS

Section 1 – Introduction to On Demand/Interactive Reporting

- infoAdvantage
- Data
- Availability
- Types of Reports
- Security Roles

Section 2 – Accessing infoAdvantage

- Logging in
- infoAdvantage environment

- Preferences
- infoAdvantage Help Menu

Section 3 – Finding On Demand/Interactive Reports

- Folder Structures
- Managing Folders
- Searching for Reports
- Opening a Report
- Evaluating Reports

Section 4 – Using On Demand/Interactive Reports

- Prompts - entering criteria to narrow/select the data in a report
- Run (Refresh) the Report
- Navigating the Report
- Filtering within a Report
- Exporting and printing reports
- Saving Report

Section 5 – More infoAdvantage Skills

- Pinning Reports
- Scheduling a Report
- Troubleshooting
- Requesting a custom report

Section 6 – Staying Up to Date

Appendix

- Toolbar and other menu options
- On Demand Report Context Menu

Section 1: Introduction to On Demand/Interactive Reporting

INFOADVANTAGE

infoAdvantage is the reporting tool used by the State of Arizona for financial reporting from the Arizona Financial Information System (AFIS) and other financial sources so data can be easily read and analyzed.

DATA

infoAdvantage currently has data from AFIS Fiscal Year 2016 and beyond.

Most of the data that is available in infoAdvantage includes information from the previous business day's activities and is not "live" data.

AVAILABILITY

infoAdvantage is scheduled to be available workdays, Monday through Friday from 6am-8pm, after the overnight ETL process completes. infoAdvantage may be available during the weekend, but is dependent on system job activities). The ETL process Extracts information from AFIS, Transforms it into the format necessary for infoAdvantage, and the Loads it into infoAdvantage. The ETL runs Monday – Friday & Sunday. Users can check the GAO website at <https://gao.az.gov/> for updates and changes to infoAdvantage available.

***TIP:** Documents processed in AFIS on Saturday will not be reflected in infoAdvantage reports until Monday and a successful Sunday night ETL run.*

TYPES OF REPORTS

There are two type of reports available in infoAdvantage: Published and On Demand/Interactive. The Published reports are scheduled (usually during the nightly batch run) and are automatically populated with data for users.

The On Demand/Interactive reports are blank reports that the user "refreshes" or runs to populate data in the report and can be refreshed at any time by the user.

Published Reports	On Demand/Interactive Reports
<ul style="list-style-type: none"> ▪ Run nightly, monthly, quarterly, or annually by GAO ▪ Automatically saved to Department’s Published Reports folder ▪ Most also available as On Demand Reports 	<ul style="list-style-type: none"> ▪ Can be refreshed “on demand” or at will by the users ▪ Several reports are available under the Statewide folder and Department folder ▪ May allow users to define criteria for the report ▪ Can be scheduled by users to run now, nightly, monthly, quarterly, or annually ▪ Save for future use

Types of Reports (format)

- Webi – default report type used in business objects/infoAdvantage for interactive reports, which provides an answer to a business question, or questions, and is available to be queried by multiple users.
- Excel
- PDF
- Dashboard - an interactive report that is usually designed as a graphic representation in a quick glance format and provides an answer to a business question, or questions, and is available to be queried by multiple users
- .text
- .csv (not available) – .CSV reports are no longer available due to performance issues and downloads not matching report filters, data and format.

INFOADVANTAGE SECURITY ROLES

In order to access infoAdvantage, the Department needs to first submit a UDOC through AFIS. User's must have an infoAdvantage Security Role (or combination thereof) and an infoAdvantage department role (INFO_XXX) for proper access. This guide focusses on the INFO_INTRCT role. These are the common roles that a Department will request:

Description	Security Role (on UDOC)	View Published Reports	Run or Schedule On Demand/Interactive Reports	Create or Modify Reports	Run/view 1099AP Confidential Report	Modify 1099AP Confidential Report	Run/view HRIS Confidential Report	Create or Modify HRIS Confidential Report
Interactive User	INFO_INTRCT	Yes	Yes	No	No	No	No	No
Report Developer	INFO_DVLPR	Yes	Yes	Yes*	No	No	No	No
1099 User	INFO_1099AP	Yes	Yes	No	Yes	No	No	No
Payroll User	INFO_PYRL	Yes	Yes	No	No	No	Yes	No

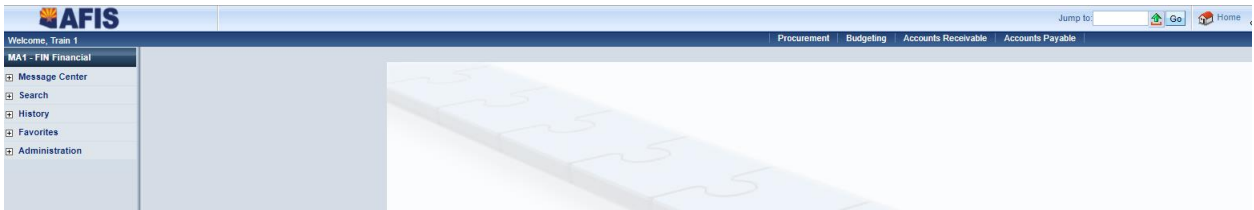
*Can only modify and save if report owner

Section 2: Accessing infoAdvantage

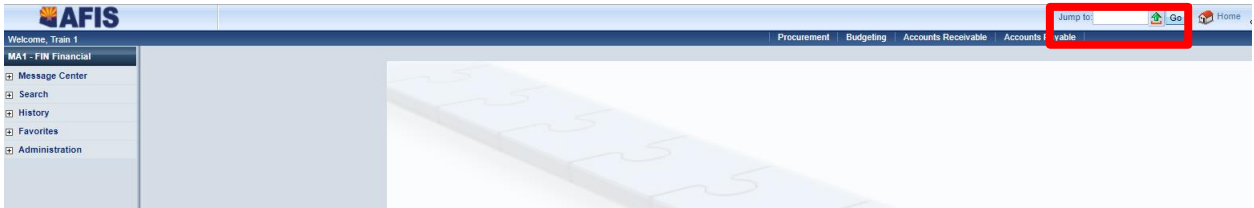
The State of Arizona uses a single sign on. This means that users need to be logged into AFIS in order to access infoAdvantage.

Users access infoAdvantage through AFIS.

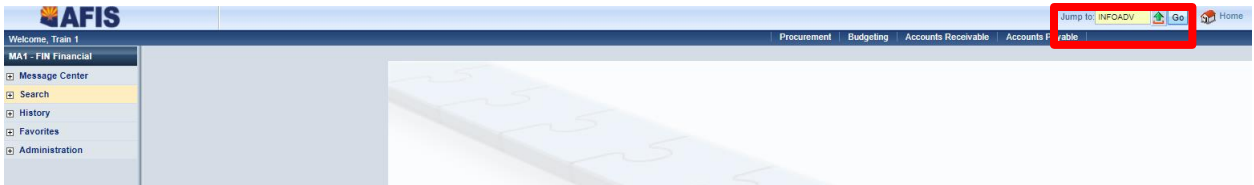
1. **LOG IN** to AFIS.



2. Click in the *Jump To* box.



3. Type INFOADV.

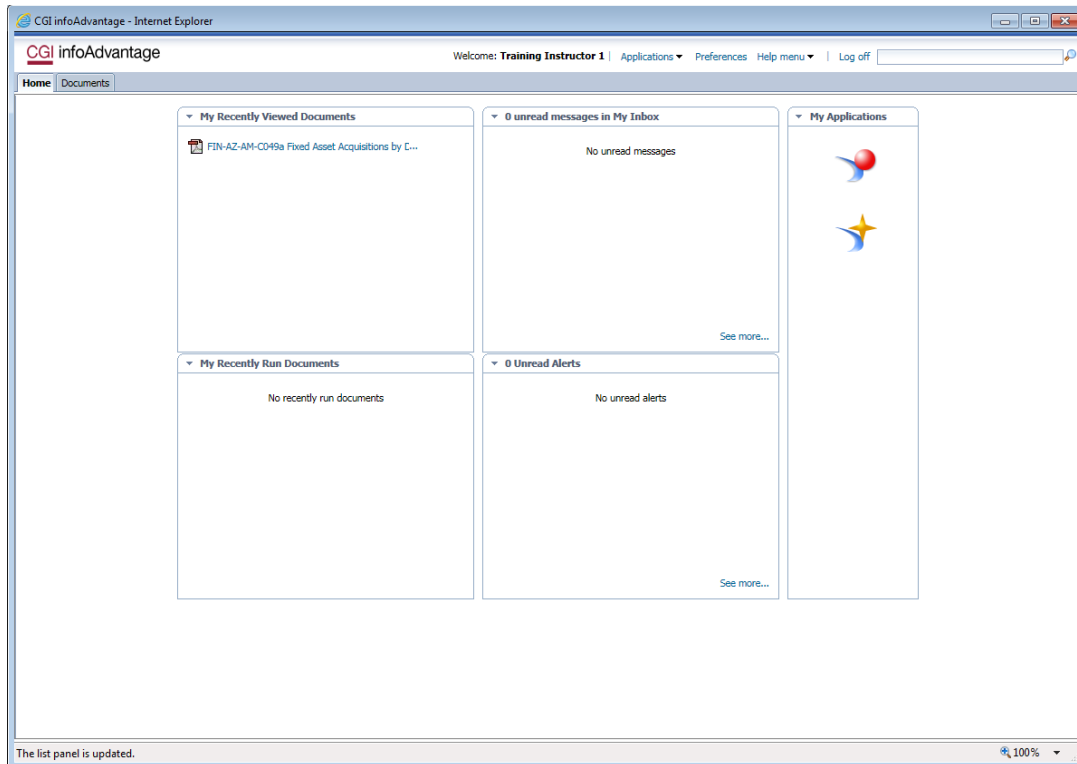


4. Press *Enter* or click *Go*. The infoAdvantage application will open.

TIP: – If the Jump To doesn't work, users can click on the Home button next to the Jump To and then try again.

INFOADVANTAGE ENVIRONMENT

When infoAdvantage is first opened, the home page pops up. The home page consists of the Home and Documents tabs, the username, hyperlinks for Applications, Preferences, Help, and the Log Off link, My Recently Viewed Documents, Unread Messages, My Recently Run Documents, and Unread Alerts.



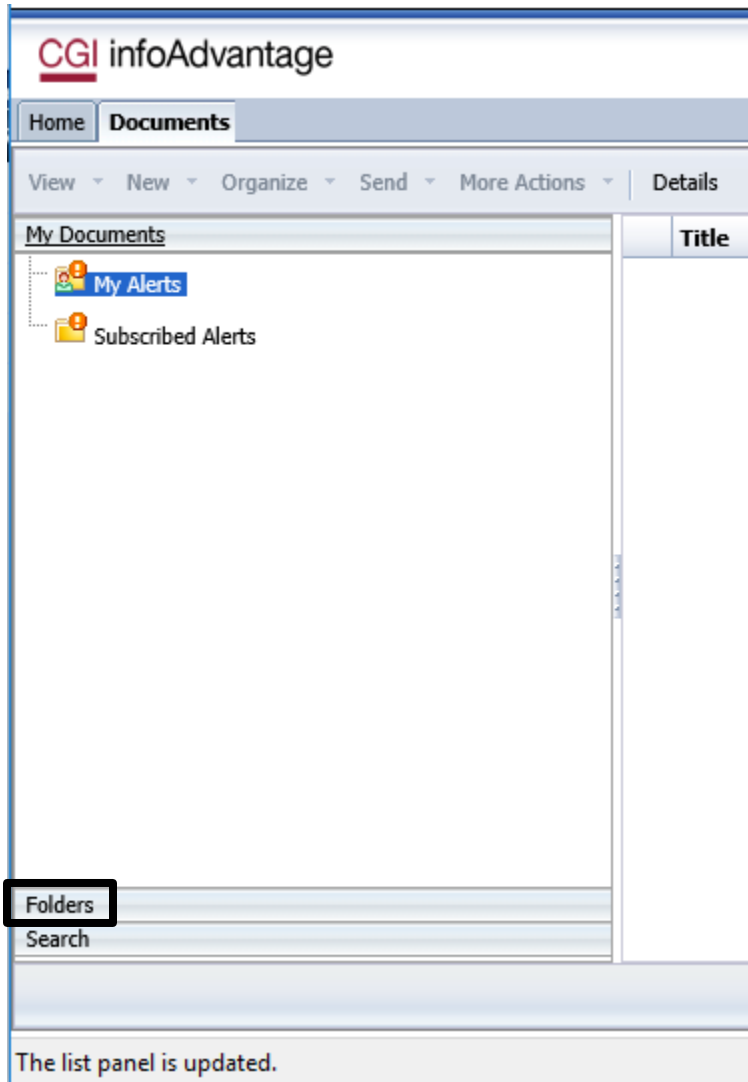
The Recently Used Documents section is in the upper left quadrant of the screen. The Recently Used Documents section is useful for seeing the latest reports run. My Recently Viewed Documents lists the last 10 documents that you viewed, sorted by view date, with the most recently viewed document at the top. My Recently Run Documents lists the last 10 documents in the repository that you scheduled or ran, with the status of each document instance.

There are two tabs.

Home is the user's personal page. The sections on the Home page make it easy to get to recently used reports and messages.

Documents is where users will find all of the reports, including Statewide reports and Departmental folders.

The main listing of reports is found under **Folders**

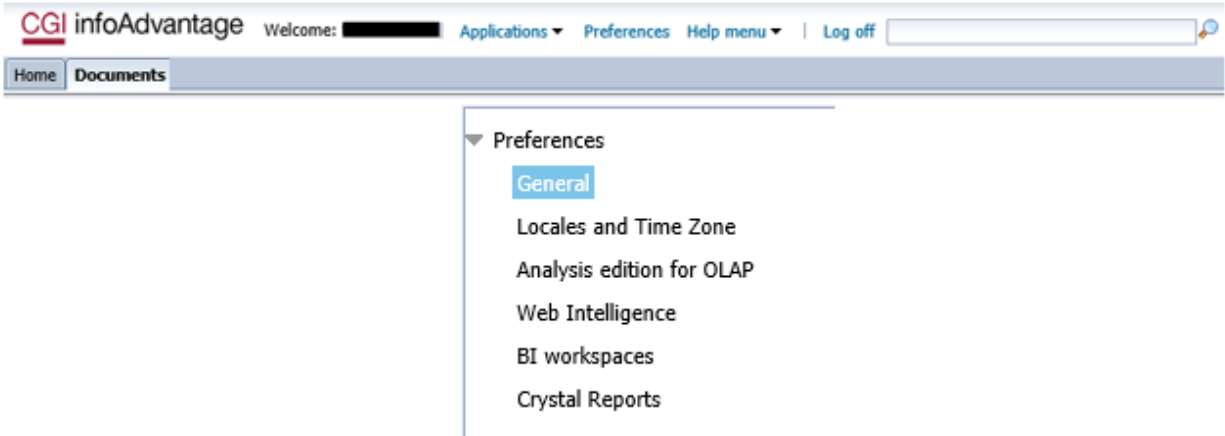


All reports are located within folders in infoAdvantage. The folder structure is helpful in finding the reports users need.

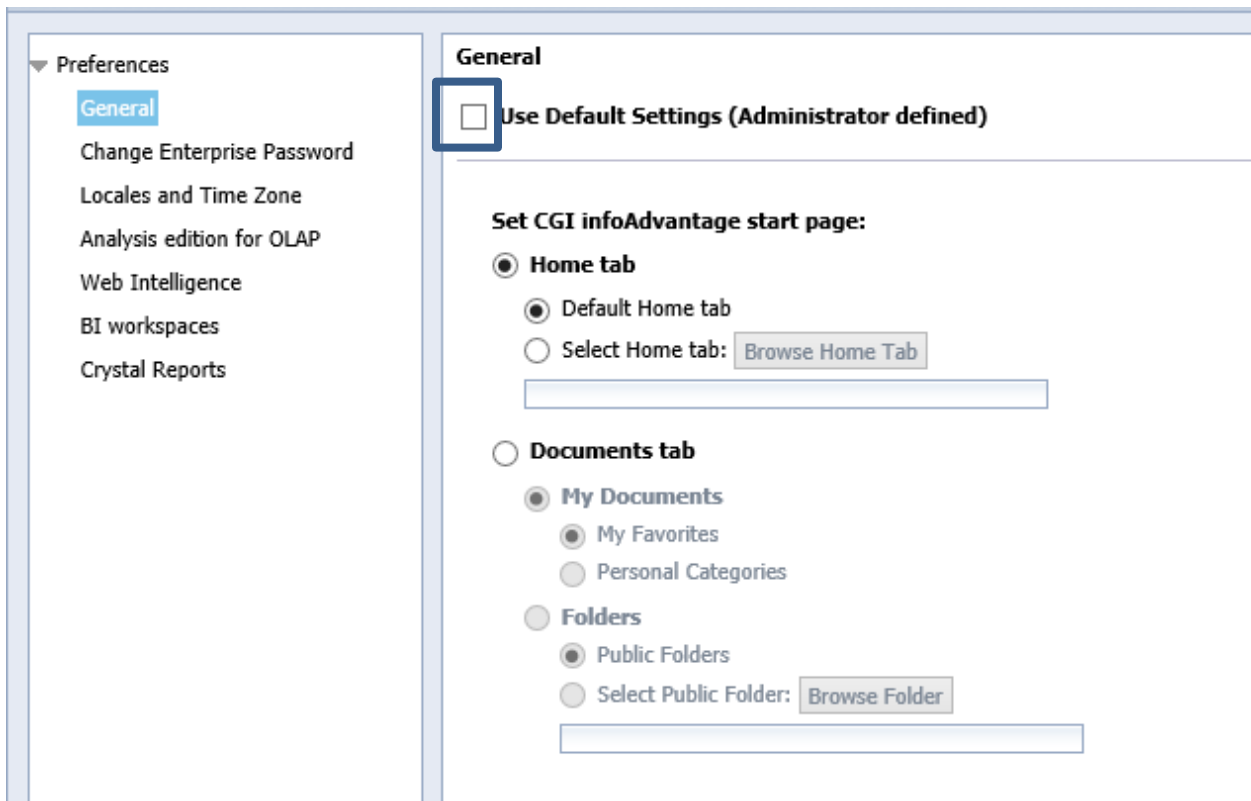
PREFERENCES

Some aspects of the infoAdvantage environment can be customized for the user.

To customize the environment, launch the Preferences menu. The categories in the Preferences menu are shown below:

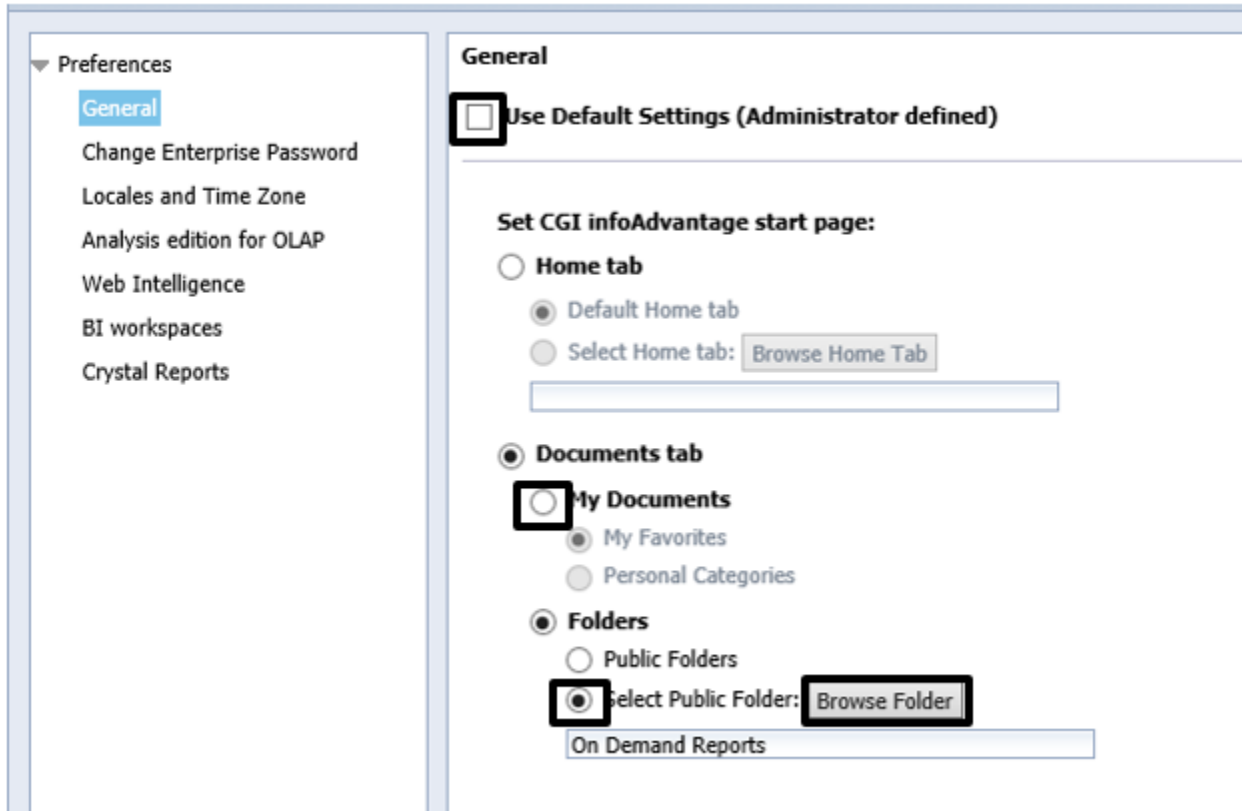


The Preference settings that pertain to the end user is General. Only settings in the General section should be changed.

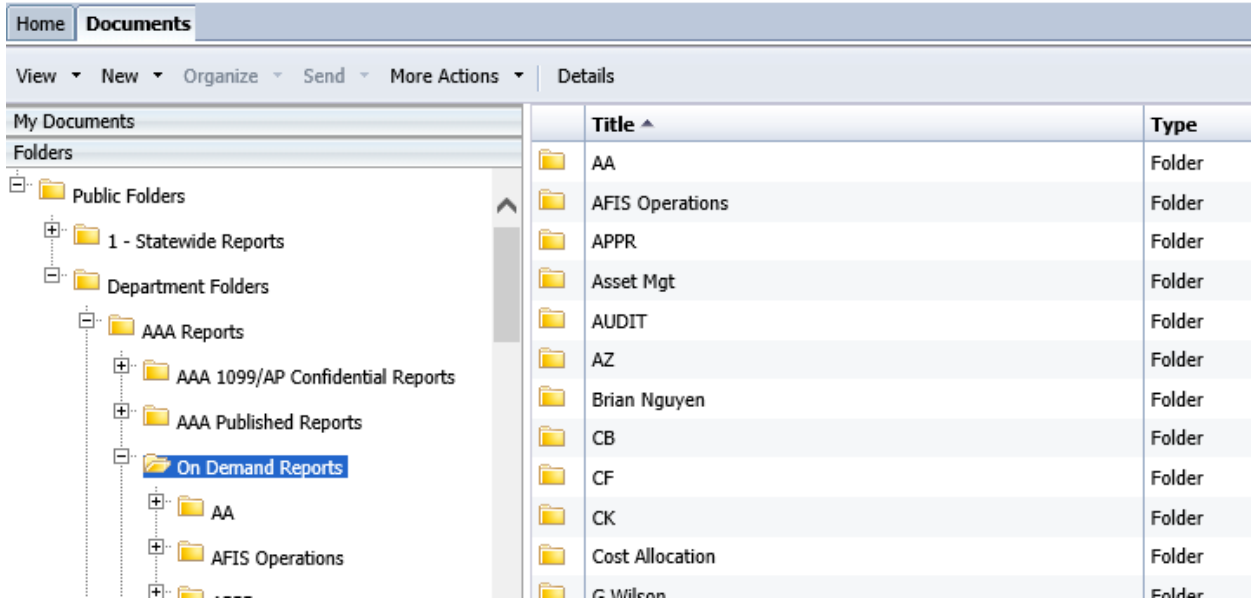


To make changes in Preferences first deselect the “Use Default Settings” box above.

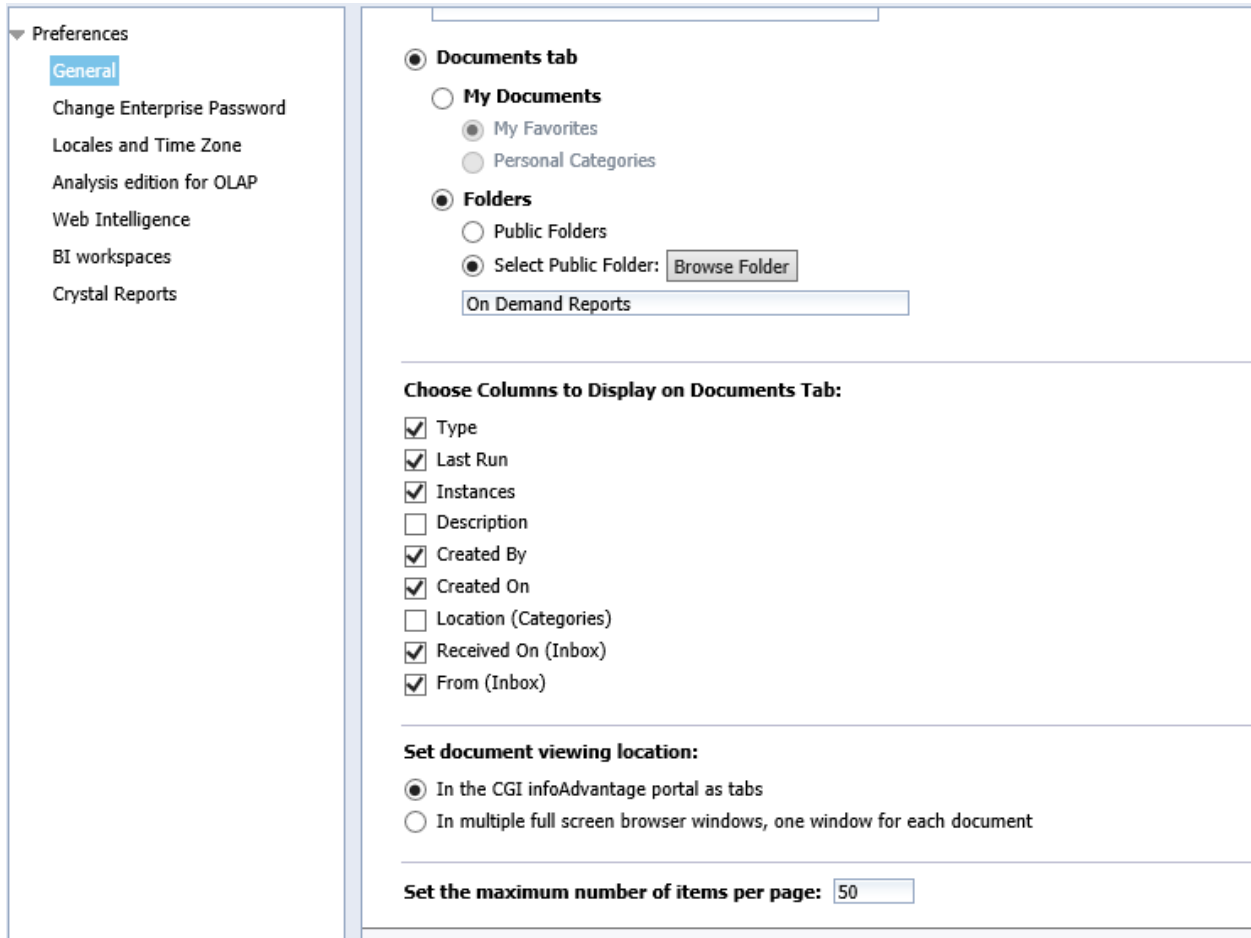
To have infoAdvantage open directly to a specific folder location, select Document tab, Folders, Select Public Folder and then Browse Folder button to select the applicable folder.



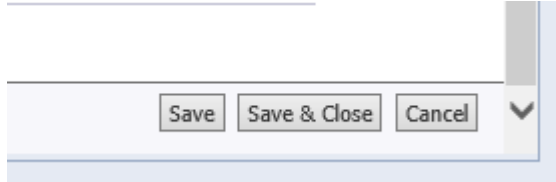
For the new Preferences to take effect, users must log out and sign back in again.



Customize Documents Tab column for report details:



Check or uncheck options under Choose Columns to Display on Documents Tab. By default Type, Last Run and Instances are already selected. Location, Received On and From are currently are not used by the State of Arizona. Description will be from the report/document properties if input by the report developer. Created By and Created On will show the EIN of the creator and the date created.

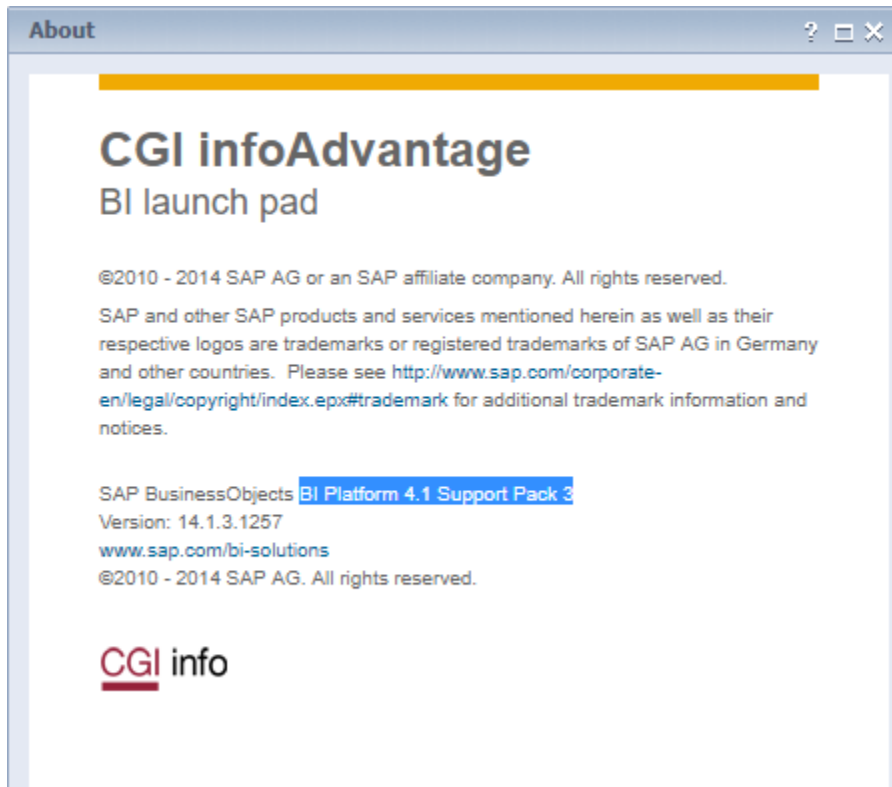


Select Save & Close once all selections have been made. These settings will be changed after logging out of infoAdvantage and logging in again.

TIP: – Setting the CGI infoAdvantage start page to the location users visit the most can save time!
TIP2: – Knowing the Created By and Created On information will provide users with details on the report owner and last update date..

INFOADVANTAGE HELP MENU

The help menu will only provide product versioning.

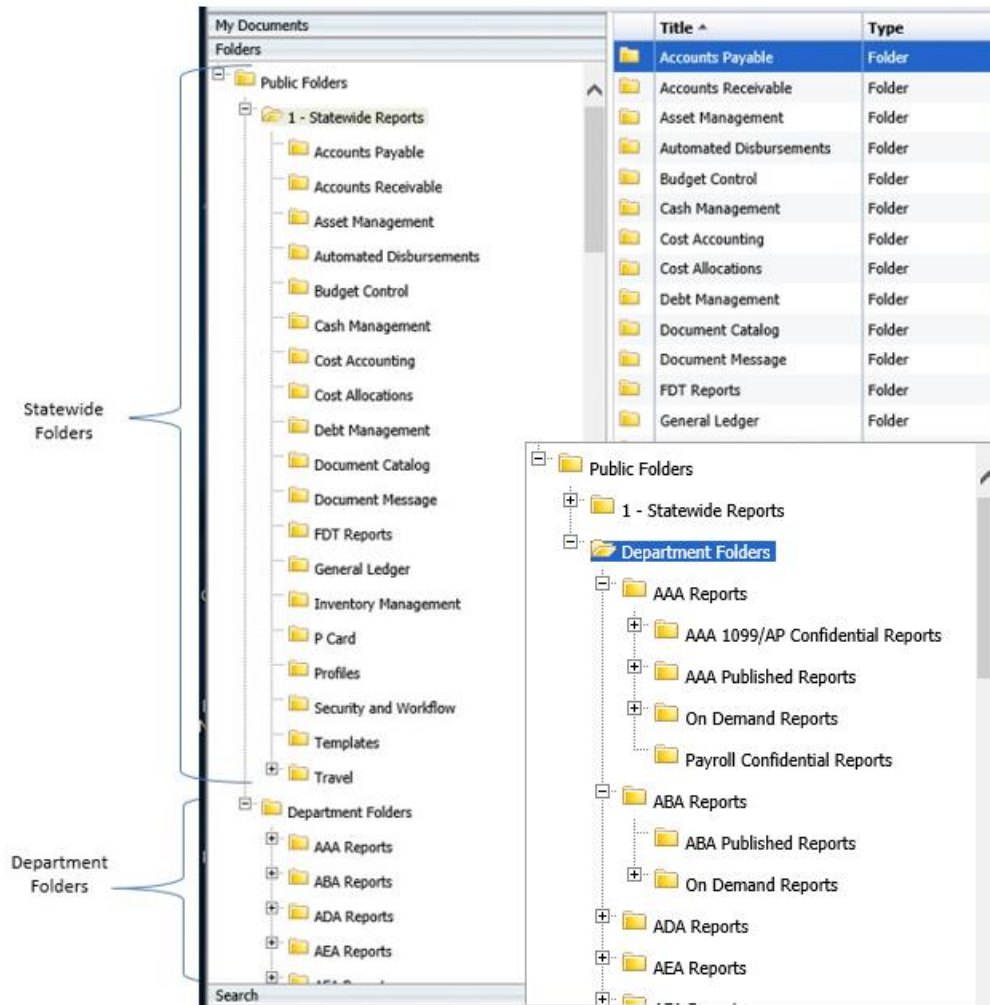


Section 3: Finding On Demand/Interactive Reports

FOLDER STRUCTURE

The State of Arizona has chosen an open report concept. This means that all infoAdvantage reports can be run by all users with the exception of confidential reports. Users are not limited to their own department's reports, but have access to view, run and copy reports within the Statewide report folders and other departmental folders.

The Folder view will open in Public Folders. Use the (+) and (-) next to the folder to expand and collapse folders:



- **Statewide Reports** – This folder contains On Demand/Interactive and Published reports. The folder is organized into subfolders by functional area (i.e. AP, AR, Budget). The content of these reports is controlled by the General Accounting Office. Department users can view, run, copy and/or create shortcuts to these reports.

Subfolders

- Accounts Payable
 - Accounts Receivable
 - Asset Management
 - Automated Disbursements – PDF, exception reports
 - Budget Control
 - Cash Management
 - Cost Accounting – Federal and Other Grants
 - Cost Allocations
 - Debt Management
 - Document Catalog – Document information
 - Document Message – Error Reports
 - FDT Reports – PDF's, Future Document Triggering Report
 - General Ledger
 - Inventory Management
 - P Card
 - Profiles – Chart of Account
 - Security and Workflow – User security and workflow
 - Templates – Templates for InfoAdvantage Developers
 - Travel
-
- **Department Folders** – Users control their departmental folders and they are broken up into several departmental sub folders. When viewing other department folders, users can only access Published Reports and On Demand folders.

Subfolders

- **1099AP Confidential Reports** - These reports are developed by GAO for each Department. Users who are granted INFO_1099AP user roles may view and run reports within this confidential report folder. Users will see these folders, but will not see the reports if they do not have the authorized access to view these reports.
- **Payroll Confidential Reports** – These reports are developed by GAO for each Department. Users who are granted INFO_PYRL user roles may view and run reports within this

confidential report folder. Users will see these folders, but not see the reports if they do not have the authorized access to view these reports

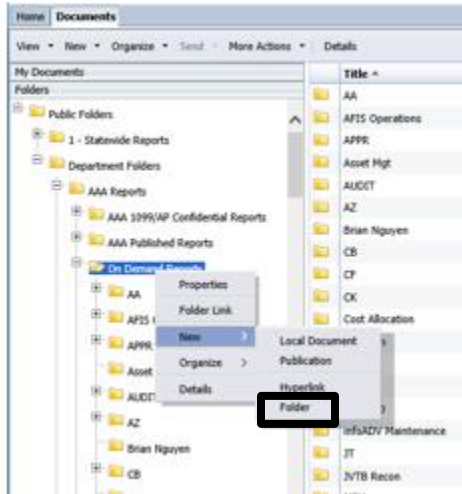
- **Published Reports** – These reports are published by GAO for each Department. Any department user may organize the reports within their assigned department folder by creating new folders and cutting and pasting the report(s) into any Department-determined folder structure.
- **On Demand Reports** – The contents of this folder are controlled by the department users. Any department user working within their assigned department On Demand Reports folder may create new folders and may also paste a report copied from elsewhere (from the Statewide folder or another Department Published or On Demand Reports folder). After the report is saved, a user with INFO_DVLPR access can edit the report. Also, new reports created by a report developer can be saved in the users Department On Demand Reports folder.

Interactive Users can delete reports they have saved in their On Demand Reports folder as well as reports that are saved in their agency's Published Reports folder.

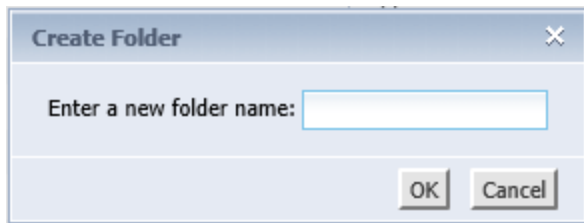
MANAGING FOLDERS

Departments are responsible for maintaining their Department Folders, Published Reports, and On Demand Reports folder structures.

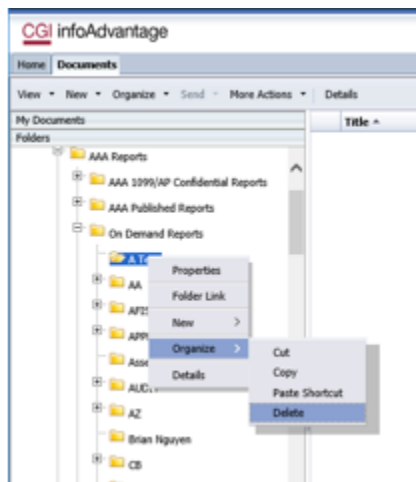
To add a folder:



Right click on the Department On Demand Report folder, highlight “New” and select “Folder”. Enter the folder name and select OK.



To Delete a folder:



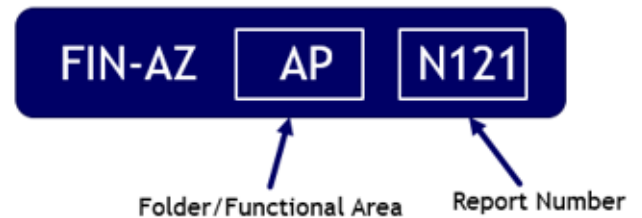
Select the folder to delete, right click on the folder name, highlight “Organize” and select “Delete”. This will delete everything in the folder, move or copy anything that needs to be saved. In the Department On Demand Reports Folder, only the creator of a report or folder can delete the report or folder. If the creator leaves the Department, email AFIS.Reports@azdoa.gov and request the report and/or folder be deleted.

REPORT NAME/DESCRIPTION

Report Names

- Most Report names and numbers in infoAdvantage follow a set pattern. GAO has setup the naming convention so that users can actually use the report number to identify where to find the report in infoAdvantage.

Folder	Functional Areas
Accounts Payable	AP
Accounts Receivable	AR
Asset Management	AM, FA
Automated Disbursements	PDF docs
Budget Control	BC, BG
Cash Management	CM
Cost Accounting	CA, GM, PA
Cost Allocations	PDF docs
Debt Management	DEBT
Document Catalog	DCAT
Document Message	MSG
FDT Reports	PDF docs
General Ledger	GL, GA
Inventory Management	IM
P Card	PC
Profiles	COA
Security and Workflow	SEC, SYS, WF
Templates	ID
Travel	TR



- In the folder structure under Statewide Folders there are more than 14 folders: one for each functional area. The report name will indicate which of these folders the report can be found in; the Report Number reflects the specific report. For example, the FIN-AZ-AP-N347 Warrant Listing will be found under the Accounts Payable folder, and the FIN-AZ-GL-N339 Cash Flow Report will be found under the General Ledger folder.

Report Description (Properties)

The screenshot shows the CGI infoAdvantage interface. In the top left, there's a 'Home Documents' section. The main area displays a list of reports under 'My Documents'. A context menu is open over a report titled 'FIN-AZ-Daily Bal...', with the 'Properties' option highlighted. Below this, the 'General Properties' section is visible, containing the following information:

- Title:** FIN-AZ-Daily Balance Sheet Summary Reconciliation
- ID, CUID:** 2850075, AVu4VO1oTkNJhtV9ghWOfxg
- File Name:** frs://Input/a_027/125/043/2850075/_adzre5k36c9eqyejpeabl8s-guid[auc0axelvn1dimtwz2e47_c].wid
- Description:** (Empty text area)
- Keywords:** (Empty text area)
- Created:** Dec 28, 2016 1:13 PM
- Last Modified:** Jan 29, 2018 10:40 AM
- Last Run On:** May 9, 2018 6:39 AM
- Locale:** English (United States)

Report descriptions in the properties section are included in the searchable data when searching for reports using the “Search using filters” below.

TIP: Titles and Descriptions can be edited and/or added in the General Properties section by the owner when or after copying and saving the report.

SEARCHING FOR REPORTS

Search using filters

Click back into Folders on the top left, select the 1 – Statewide Reports and then select the Accounts Payable folder. Items within folders can be sorted by clicking on the column header:

Not hovering over Title box

Title	Type	Last Run	Instances
FIN-AP-0004 Open Items - Pre-	Web Intelligence		0
FIN-AP-0008 Open Items - Pre-	Web Intelligence		0
FIN-AZ-AP-C021 Future Schedu	Web Intelligence		0
FIN-AZ-AP-C032a Count - Bank	Web Intelligence		0
FIN-AZ-AP-C032b Average Dail	Web Intelligence		0
FIN-AZ-AP-C032c Average Daily	Web Intelligence		0

Hovering over Title box

Title ^	Type	Last Run	Instances
FIN-AP-0004 Open Items - Pre-	Web Intelligence		0
FIN-AP-0008 Open Items - Pre-	Web Intelligence		0
FIN-AZ-AP-C021 Future Schedu	Web Intelligence		0
FIN-AZ-AP-C032a Count - Bank	Web Intelligence		0
FIN-AZ-AP-C032b Average Dail	Web Intelligence		0
FIN-AZ-AP-C032c Average Daily	Web Intelligence		0

If a report is within a folder, users can navigate through the folders and subfolders through filtering:

- Sort a column by clicking the column header
- Filter a column by clicking the filter symbol on the column head.

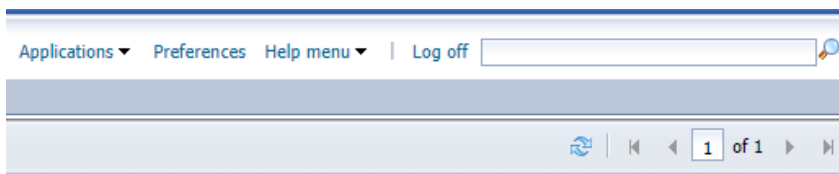
To get the filter symbol to display, hover the mouse over the right section of the column header. Click the symbol to expand the filter menu.

To clear the result, click on the filter symbol, check the clear filter box and click OK.

TIP: Don't forget to clear the filter!

Search boxes

infoAdvantage has a robust search feature to allow users to search for reports. Simply input a term, such as “receivables”, or several key words, then either click enter or click on the magnifying glass:



The search tab will open and display the results from the search:

The screenshot shows a document management interface with a search bar containing 'receivables'. The search results are displayed in a list on the right side of the window. The results include:

- FIN-DT-AR-N183 Accounts Receivable Status**: This report lists the **receivable** amount, any adjustment to the **receivable** amount, collected amount, User Folders/122380
- FIN-DT-AR-N183 Accounts Receivable Status**: This report lists the **receivable** amount, any adjustment to the **receivable** amount, collected amount, DTA Reports/On Demand Reports/Accounts Receivable
- FIN-DT-AR-C035 Open Items - Accounts Receivables**: Report is a **detailed listing of open Accounts Receivable** documents for ADOT only, subtotaled by Unit DTA Reports/On Demand Reports/Accounts Receivable
- Receivable Report**: AGA Reports/On Demand Reports/Budget/Ana
- NF Receivable**: HCA Reports/On Demand Reports/AAA reports for testing SM/JZ/My Doc
- Receivable by Function**: AGA Reports/On Demand Reports/Budget/Ana
- FIN-AR-0004 Receivable History**: ADA Reports/On Demand Reports/OOTC
- FIN-AR-0004 Receivable History**: 1 - Statewide Reports/Accounts Receivable
- FIN-AR-0004 Receivable History**: ICA Reports/On Demand Reports/Accounts Receivable
- FIN-AZ-GM-C076d Comparison Between Claim Submitted and Actual Revenue Received by Grant**: 1 - Statewide Reports/Cost Accounting

On the left side, there are filters for 'type', 'location', 'Refresh Time', and 'datasource'.

Results can then be narrowed by the type of report, location of report, data source, and the author.


OPENING A REPORT

The screenshot shows a document management interface with a list of reports. A context menu is open over the report 'FIN-AZ-AP-N036m Monthly Expenditure Comparison Report'. The menu options are:

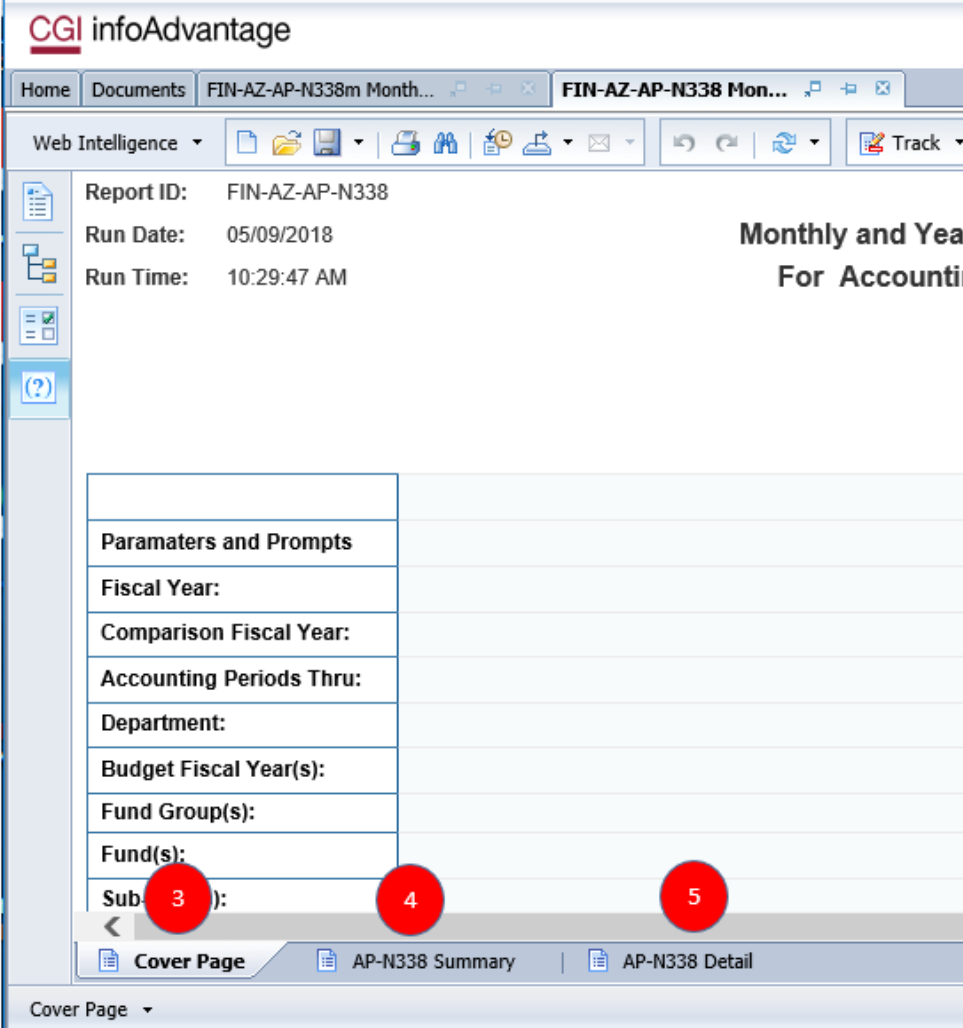
- View
- Properties
- Mobile Properties
- History
- Categories
- Document Link
- Organize
- Details

The 'View' option is highlighted, indicating the report is being opened.

Open the report, either by double-clicking the report or right-clicking and choosing "View".



- (1, 2) Multiple reports can be open simultaneously and will show as tabs
- ↓ Click the **Close** button to close the report without saving
- ↑ Click Home to go to the Home page, or Documents to go back to the folder list.



Report ID: FIN-AZ-AP-N338
 Run Date: 05/09/2018
 Run Time: 10:29:47 AM

**Monthly and Year
For Accounti**

Parameters and Prompts	Sub. (s):
Fiscal Year:	
Comparison Fiscal Year:	
Accounting Periods Thru:	
Department:	
Budget Fiscal Year(s):	
Fund Group(s):	
Fund(s):	
Sub. (s):	

Cover Page | AP-N338 Summary | AP-N338 Detail

The report itself may have multiple tabs (3, 4, 5).

EVALUATING REPORTS

Upon opening a report, a description of the report should appear on the first page:

The screenshot shows a web application interface for reporting. At the top, there are browser tabs and a navigation bar with options like 'Web Intelligence', 'Track', 'Drill', 'Filter Bar', 'Freeze', and 'Outline'. Below this, the report title is 'State of Arizona Monthly and Yearly Expenditure Comparison Report For Accounting Period and Fiscal Years and'. Report details include: Report ID: FIN-AZ-AP-N338, Run Date: 05/09/2018, and Run Time: 10:29:47 AM. A table on the left lists various parameters like Fiscal Year, Department, and Fund Group(s). A red arrow points to a 'Report Description' box containing the following text:

Report Description: This report compares expenditures over two prompted years on a monthly and year-to-date basis. Both Cash (closing class 10) and Accrued (closing class 11) expenditures are included. The following posting codes are excluded: A366, D023, F020, F021, F022.

There are three tabs: Cover Page, Summary, and Detail. Input controls are available on the Summary and Detail tabs for users to filter the data.

At the bottom, there are tabs for 'Cover Page', 'AP-N338 Summary', and 'AP-N338 Detail'.

This description is a part of the report and separate from the properties description. This description should help when trying to decide if this is the correct report to run, before running the report.

Reminder: Most reports contain data up to the previous day's information, however, a few reports contain "Live" data such as: FIN-AZ-DCAT-N522 Document Detail - Draft Documents, OFIN-AZ-DCAT-N604 Document Creation Information, etc.

Section 4: Refresh/Run On Demand/Interactive Reports

PROMPTS


Entering criteria to narrow/select the data in a report

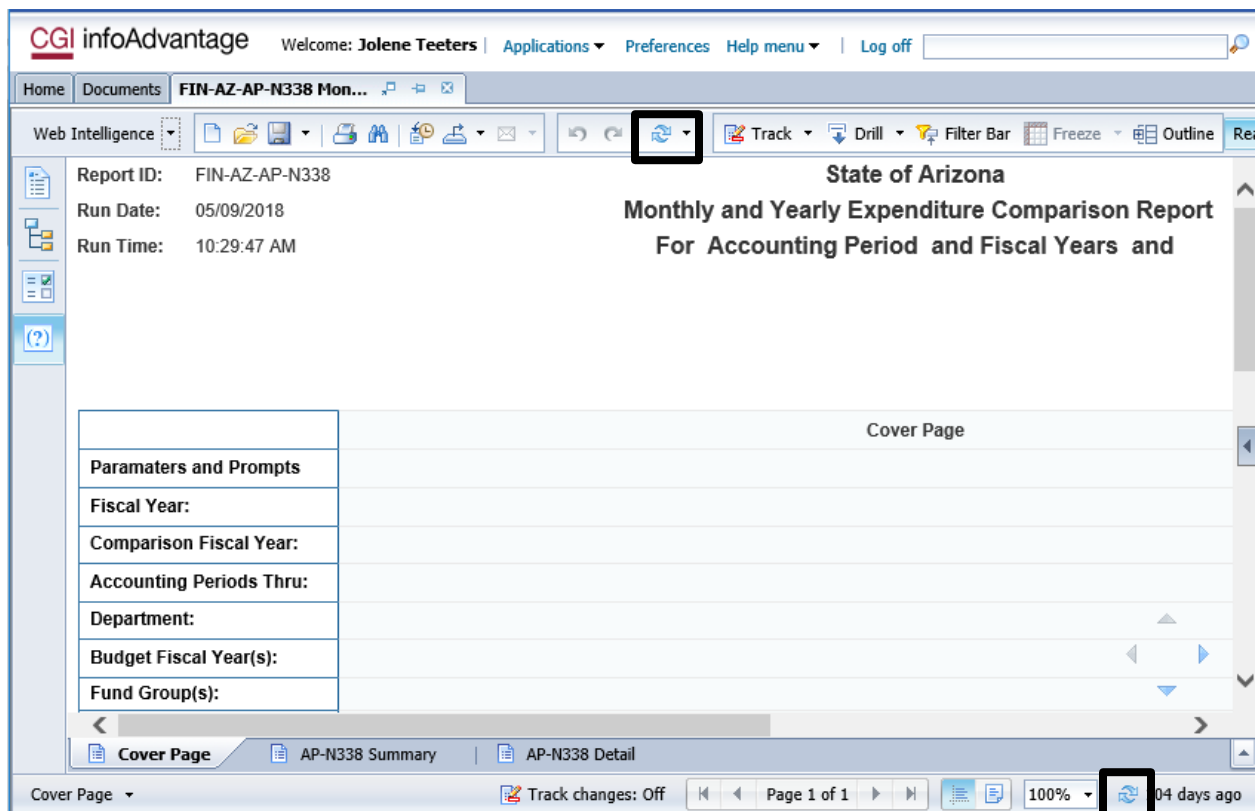
Prompts determine data filters before the report is run. Each report has a different set of prompts based upon the purpose of the report and its underlying data.

There are two locations to enter criteria in prompts:

- Advanced Prompt Menu (recommended method)
- Sidebar Prompt Menu

REFRESH/RUN THE REPORT

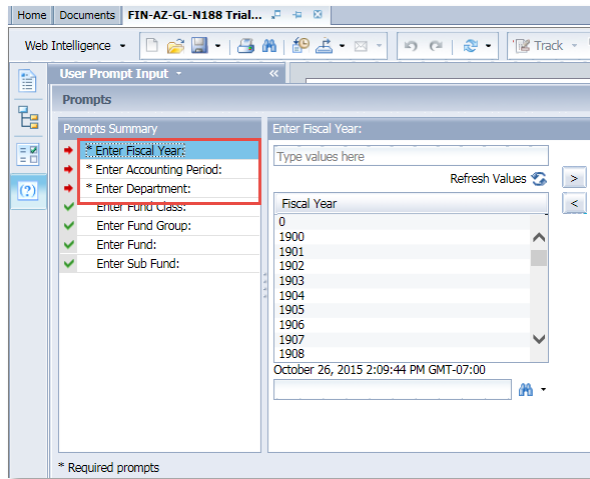
To refresh/run the report, click on one of the two refresh buttons  below.




This will open the Advanced Prompt Menu shown below.


Advanced Prompt Menu

The Advanced Prompt will appear when the report is refreshed.



Prompts that have a  in front of them are required. These prompts will also have an asterisk (*) in front of the words.



Prompts that have a  are optional. The user can use them to further refine the data.

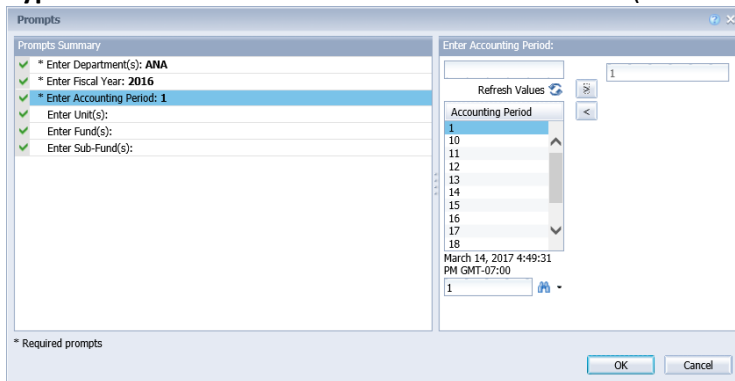
There are three ways to enter criteria in the prompts:


- Search Box (Binoculars)
- List of Values
- Manual Entry

Search Box (Binoculars)

The user can do a search to narrow the list of values that are provided, too.

Type the information wanted to find in the Find box (at the bottom with the binoculars).

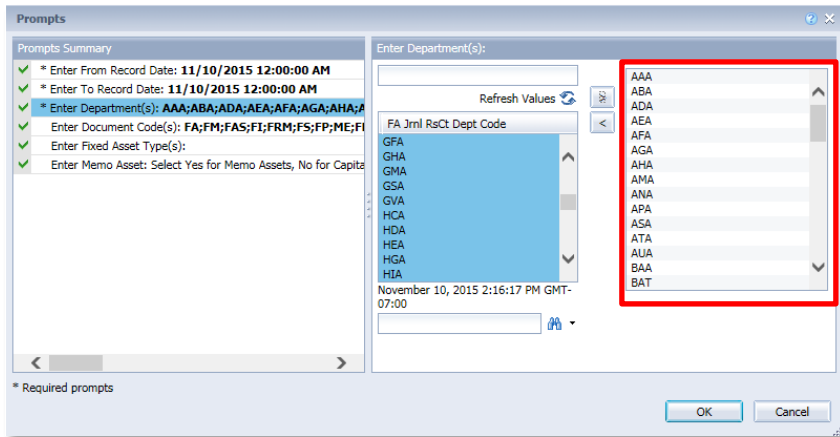


Click the  (binoculars) button to find matching values.

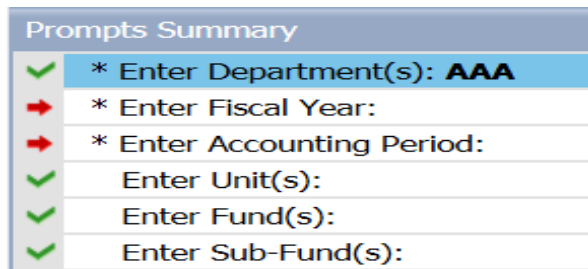
Select from the resulting list (2) and **Click** the > right arrow to add what was typed or selected into the selected prompt. (3)

List of Values

When there is a larger box allowing more than one entry, the user can enter or select multiple entries from the List of Values by using **Shift-Click** to select items in a row, or **Ctrl-Click** to select non-contiguous items.



Note that once the user enters something in a prompt, it will turn  to indicate that the entry requirement has been satisfied.



TIP: Using the List of Values is the recommended method for entering criteria into the prompts!

Manual Entry

To manually enter the criteria in the form:

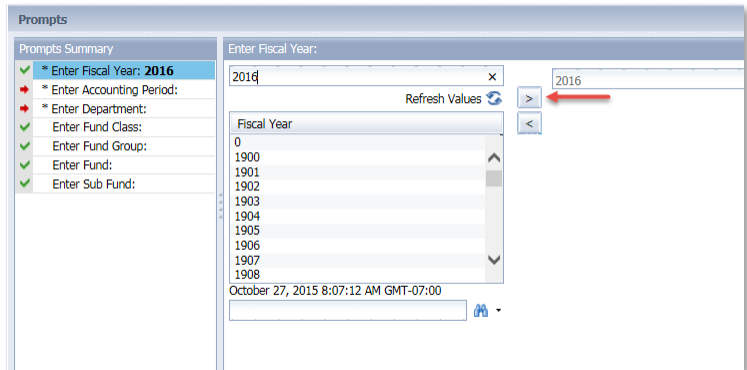
infoAdvantage is case sensitive. *aba* is *not* the same as **ABA.** If the user enters aba instead of ABA, no records will be returned. Case matters! (AFIS automatically converts data fields to uppercase for the user, but infoAdvantage does not.)

Type an entry into the prompt

or

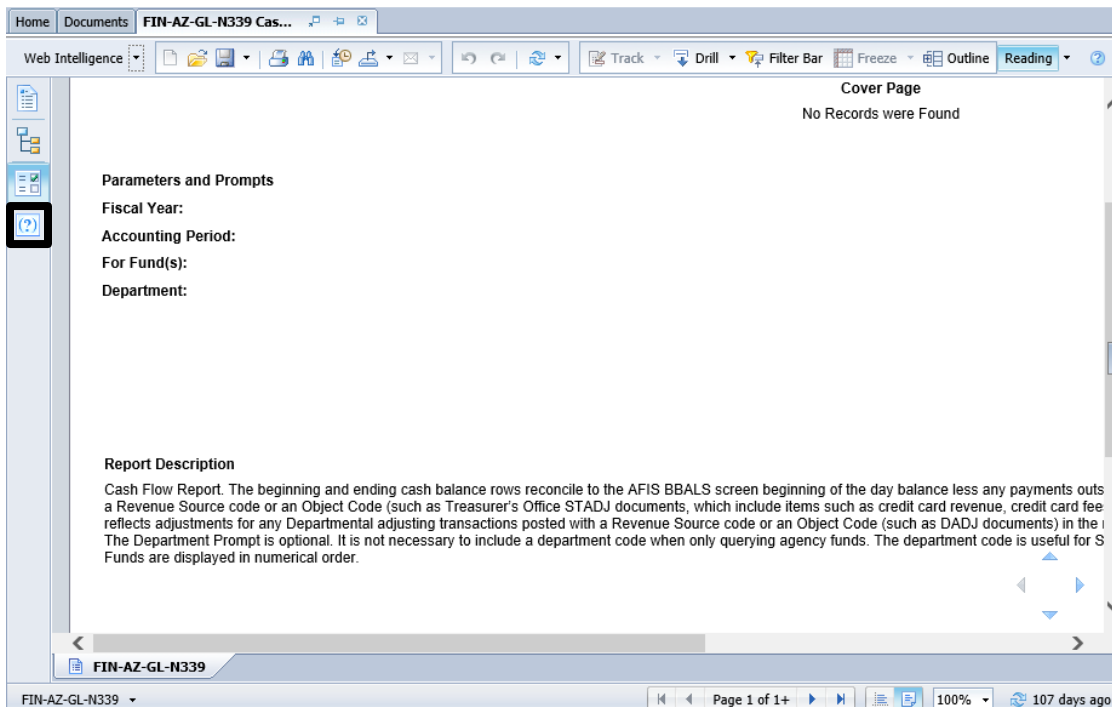
Select a value from the list provided.

Click the > (right arrow) to add what was typed or selected into the selected prompt. (**Click the <** (left arrow) to remove values from the prompt, if needed.)



Sidebar Prompt

The Sidebar Prompt Menu allows users to enter in criteria without going through the form, however, it doesn't give the user any lists to choose from, it requires the user to know the exact format and data. Optional prompts are indicated by the work optional, all other prompts are required.



The Sidebar Prompt Menu is useful when:

- The user is fairly confident in infoAdvantage
- The user already knows the criteria AND how it is entered in AFIS
- The user wants to run the report more than once with different sets of criteria, for example, if the user wanted to look at different Accounting Periods one after the other.

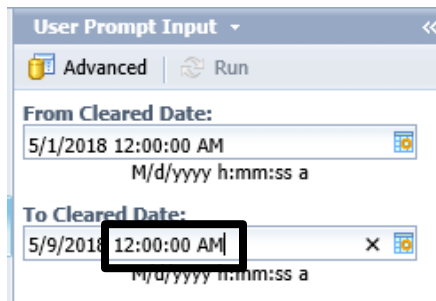
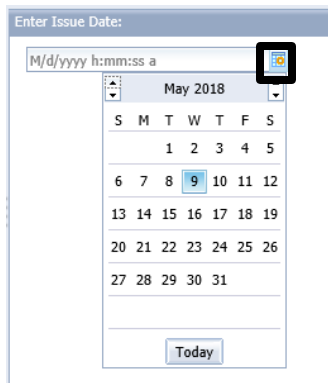
If using the Sidebar Prompt Menu, don't click Refresh on the top toolbar or bottom right corner. Instead click **Run** at the top of the Sidebar Prompt menu.



Special Types of Prompts

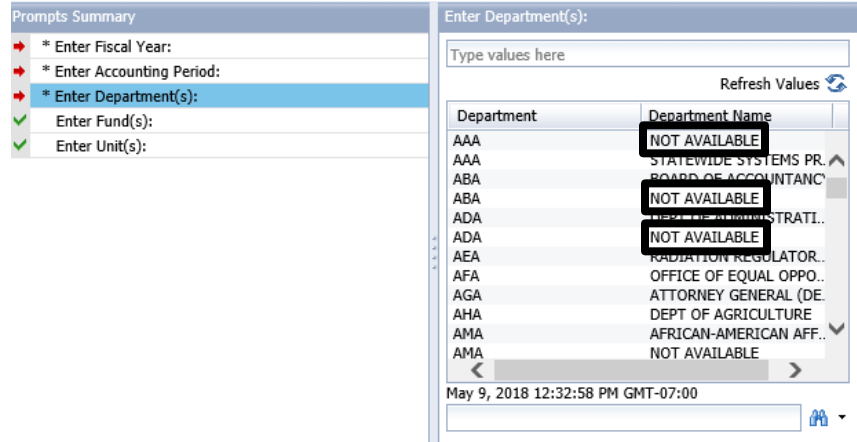
Dates:

When entering a date for a prompt it is strongly recommended to use the calendar to select the date. infoAdvantage defaults to 12:00 AM for the date chosen. To include the "To" or "End" date in the report, add one day to the date because 12:00 AM is the beginning of the day not the end of the day. Example below would return documents with an Issue date of 5/1/2018 through 5/8/2018.



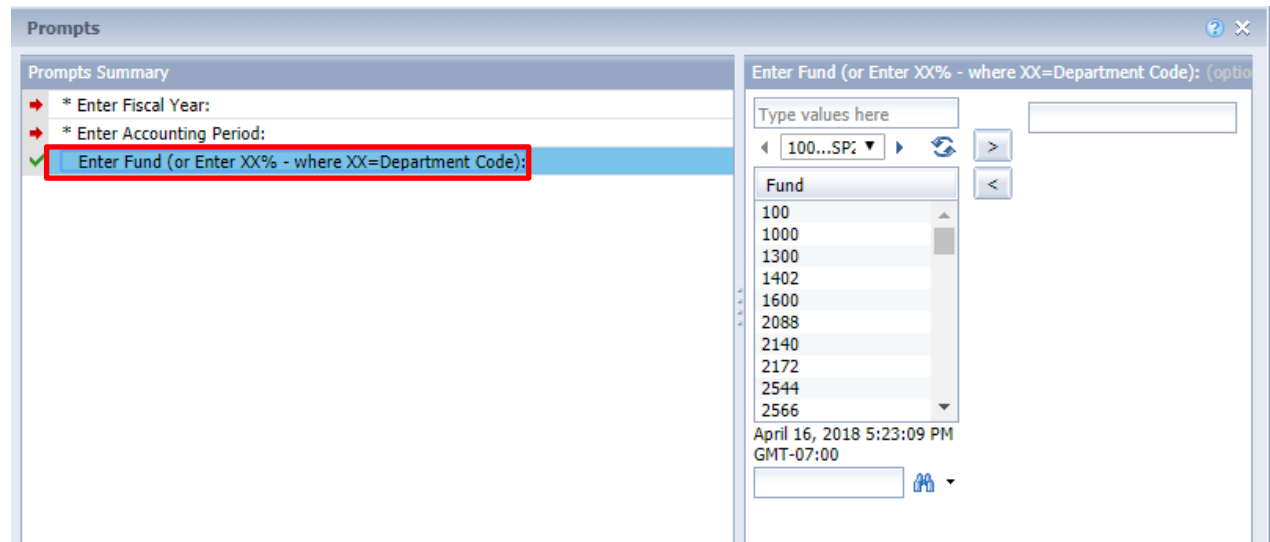
Department:

When selecting departments from lists, if Department Name is in the list, be sure not to select a department displaying a department name “NOT AVAILABLE”.



Matches Pattern

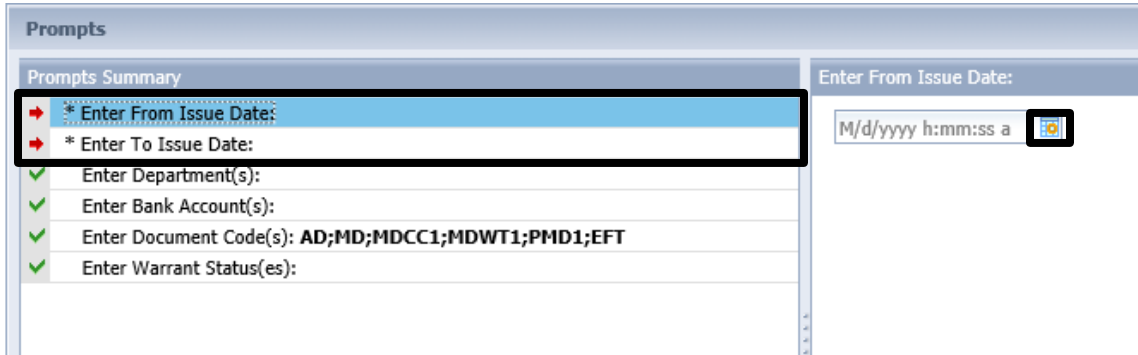
A matches pattern prompt will request the use of “%” or “_” to be used as a wildcard. A “%” wildcard is a substitute for any string of characters and “_” wildcard is a substitute for a value/character.



This example will show all of the funds for a department in the report.

In-between

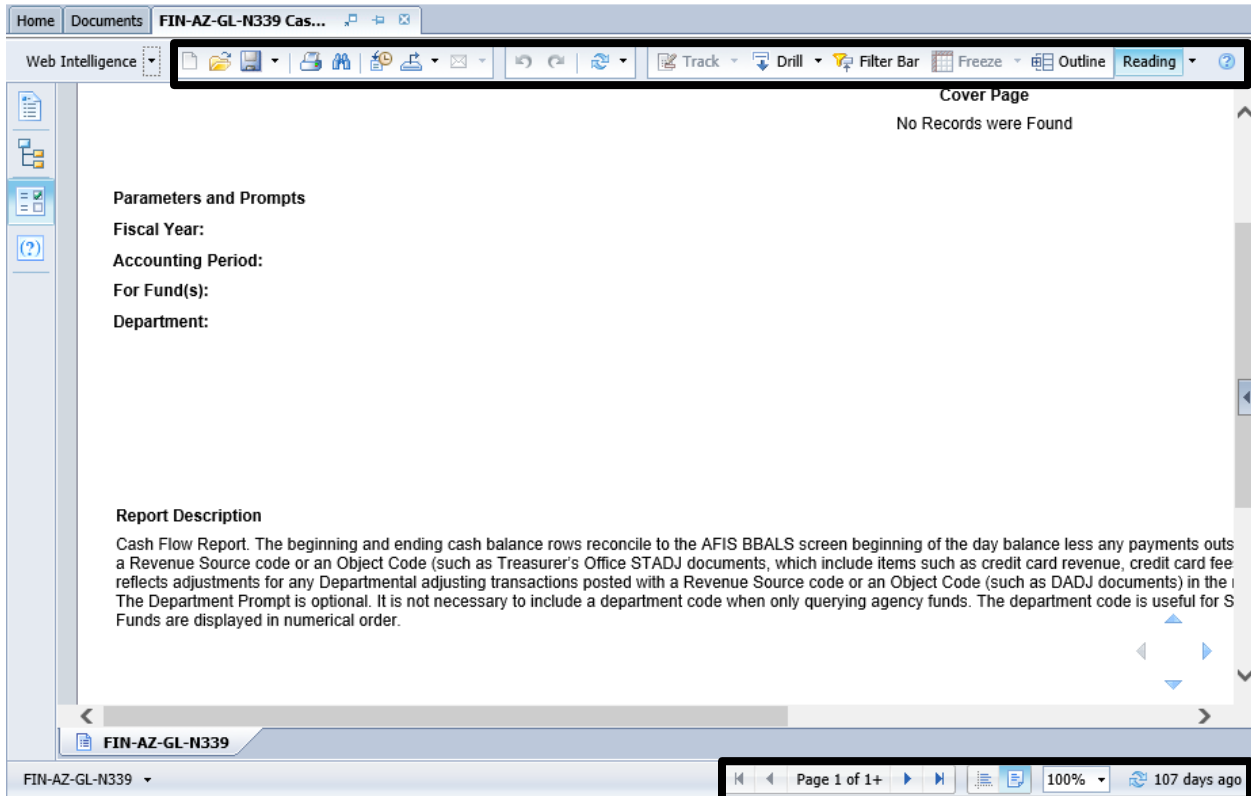
The “in-between” prompt will request users to enter a “from” and “to” date to pull anything between two dates including the dates themselves:




























This example requires the user to choose a “From” date and a “To” date to narrow the range of issue dates that will be displayed in the report.

NAVIGATING THE REPORT

Navigating an infoAdvantage report is similar to navigating in other documents and programs.



Report Buttons

Button:	Name:	Description:
	New	Only available to Developers
	Open	Open a folder: Search for reports in the folders available to the user
	Save	Save the report: "Save As" allows users to select the folder in which the report should be saved.
	Print	Print does not work from infoAdvantage. The report will need to be exported to print.
	Find	Find opens a search bar on the bottom and will search within a report
	History	History opens up the list of dates corresponding to the instances when the document was scheduled
	Export	Export report allows report to be saved as a PDF, Excel, or Text document
	Send to	Not Available for Interactive users
	Undo	Cancel or reverse the last one or more commands
	Redo	Cancel or reverse the last one or more undo's
	Refresh	Refresh one or more data in a report, opens the Advanced prompt menu
	Track	Not Available for Interactive users
	Drill	Not Available for Interactive users
	Filter Bar	Opens the Report Filter Bar – See filtering within a Report for more information
	Freeze	Not Available for Interactive users
	Outline	Enables the user to summarize the report
	Reading	To toggle between HTML and PDF view
	Help	Help Menu
	Back Buttons	To move backward in a report either one page at a time or to the beginning of a report.
	Page #	Displays page number and number of pages once the pages have been activated.
	Forward Buttons	To move forward in a report either one page at a time or to the end of a report.
	Quick Display Mode	The Quick view displays all the data on one page.
	Page Mode	Displays the data on the current page only.
	Zoom	To zoom in and out of a report page
	Refresh	Refresh one or more data in a report, opens the Advanced prompt menu

Common report error


Report ID: FIN-AZ-GL-N339 State of Arizona
 Run Date: 05/09/2018 Cash Flow Report
 Run Time: 3:11 PM

Cover Page

Parameters and Prompts

Fiscal Year: 2018
 Accounting Period: 1
 For Fund(s): ST4008
 Department:

Retrieving Data

 No data to retrieve in FIN - Budget Vs Actual


Report Description

Cash Flow Report. The beginning and ending cash balance rows reconcile to the AFIS BBALS screen beginning of the day balance less any payments a Revenue Source code or an Object Code (such as Treasurer's Office STADJ documents, which include items such as credit card revenue, credit card reflects adjustments for any Departmental adjusting transactions posted with a Revenue Source code or an Object Code (such as DADJ documents) in The Department Prompt is optional. It is not necessary to include a department code when only querying agency funds. The department code is useful Funds are displayed in numerical order.

FIN-AZ-GL-N339

With this common error, there may actually be data in the report. This error is showing that there was no data pulled from the FIN - Budget Vs Actual universe, and will not display any data, even though there may be data from another universe that may be displayed.

IMPORTANT – If you receive the error below when running a report there may actually be data. First see

if the single forward arrow  is blue (active) there is data and page forward to retrieve data.

Reports that run online for an extended period of time, may timeout. For additional options on running larger report, see the section on how to schedule reports.

FILTERING WITHIN A REPORT

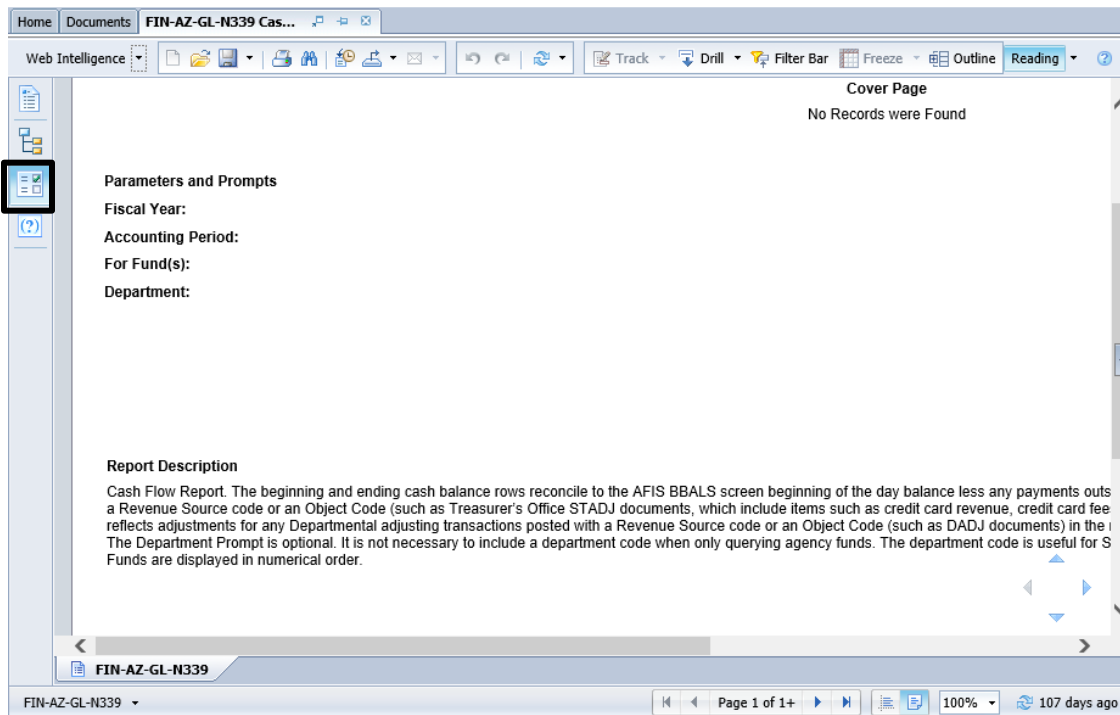
After a report is run, filtering allows users to refine the information contained within the report without the need to refresh/run the report again. There are two methods for interactive users to filter reports in infoAdvantage:

- Using Input Controls on the side panel
- Filtering from the filter bar on top

Input Controls – created by the developer of the report, they allow a user to filter the report by selecting items from a list.

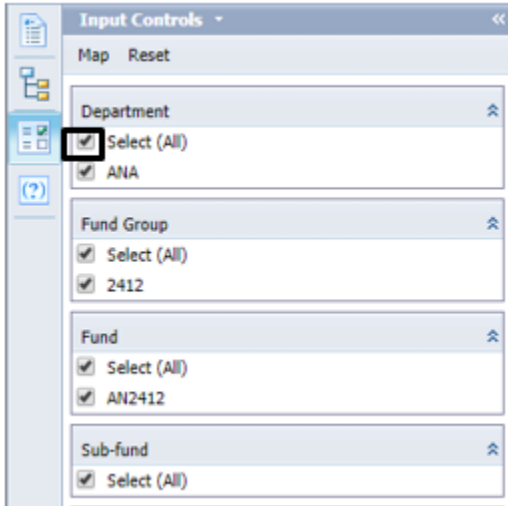
To filter a report with Input Controls

1. Click the Input Controls button on the left side of the screen to display the Input Controls.

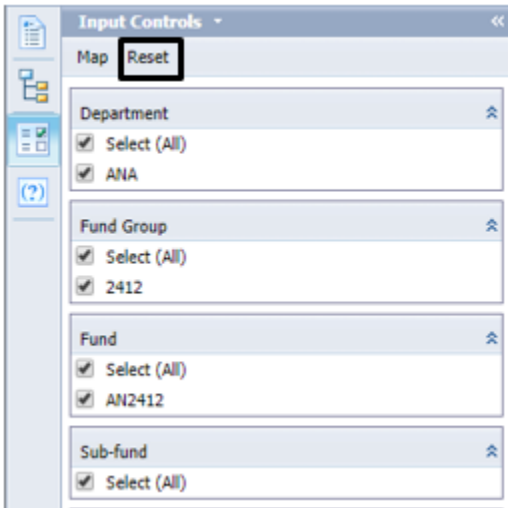


2. The Input Controls panel will open and allow users to toggle objects in the report

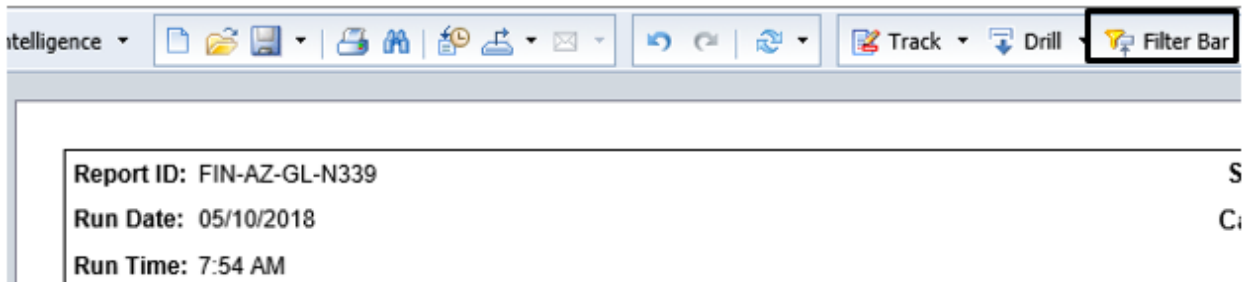
3. **Click** the check box to de-select the objects for the report.



4. **To turn the filter off** Click the reset button:

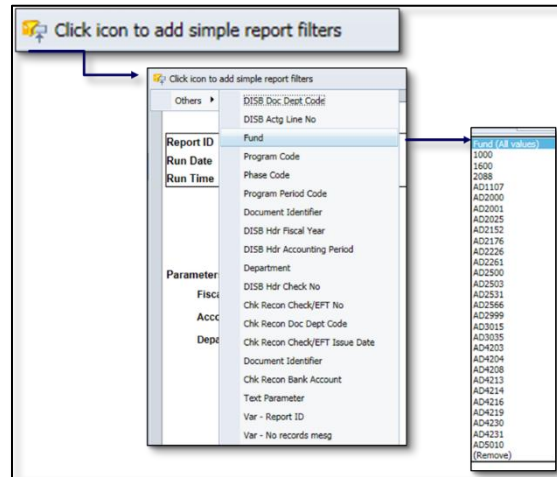


Filter Bar – filter bars can be added for report objects. Multiple objects can be filtered, but only one filter value (or All values) per object can be applied.



To filter a report with the Filter Bar

1. **Click** the Filter Bar button to display the filter bar.
2. **Click** the Add Simple Report Filter button
3. **Select** the field to filter by.
4. **Select** the value to filter for.



To turn the filter off

1. Select All Values from the field filter.
2. Click the Add Simple Report Filter button to toggle the filter off
3. Click the Filter Bar button to toggle the filter bar off.

DON'T FORGET TO TURN IT OFF!

Prompt & Filter Comparison						
Filter Types	May Be Required Fields	Pre-Selected Fields	Limited to one filter value per object	Selected before report is Refreshed /Run	Can be added by Interactive user	Added by Developer
Report Prompt	X	X		X		X
Input Controls		X				X
Filter Bar			X		X	

COPYING REPORTS

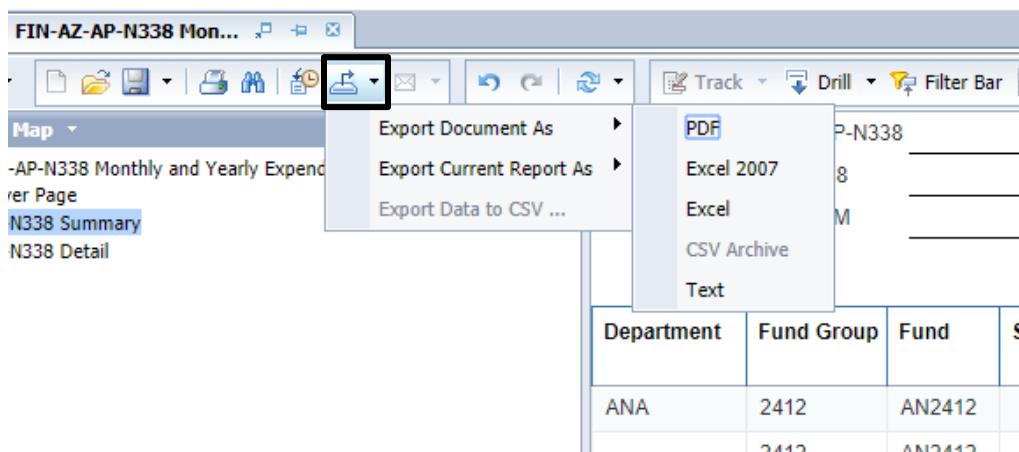
Interactive Users can create shortcuts or copy reports into their Department’s On Demand folder for ease of use. The differences are identified in the chart below:

Shortcut	Copy
On Source Report, Right click > Organize > Copy Shortcut and Paste Shortcut.	On Source Report, Right click > Organize > Copy and Paste.
Links to the source report.	DOEN NOT link to the source report.
If source report is a Statewide Report, any updates are immediately reflected.	If source report is a Statewide Report, updates are NOT reflected.
If source report name is changed, link will be broken.	Not affected by any changes to source report.
No customization available.	If Report Developer is owner, can customize.

EXPORTING AND PRINTING REPORTS

Exporting

The user has the choice of exporting either the Document or the Current Report.



- **Export Document As** is used to export the all report tabs. If there are multiple tabs, all will export.
- **Export Current Report As** exports just the current tab of the report.

TIP: If exporting as Excel, use “Excel 2007” for the most recent Excel version.

To export a report:

1. Click the Export button.



2. Select *Export Document As* or *Export Current Report As*
3. Select PDF, Excel 2007, Excel (Excel 97/2003) or Text

CSV format is not available because it is raw data, may have multiple tables and is not like the report format. **This format also lead to performance issues in infoAdvantage, therefore it was removed.**

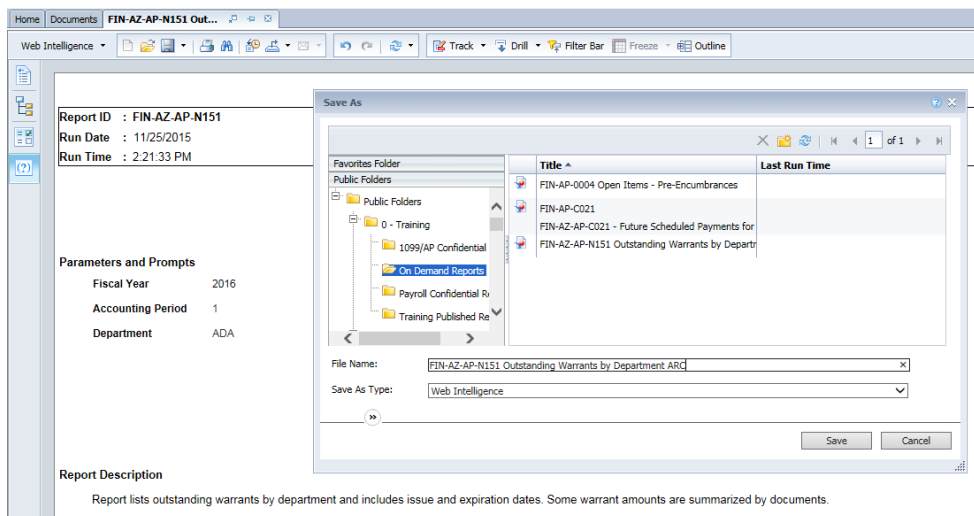
4. Open, Save, or Save As the document.

Printing

Reports cannot be printed directly from infoAdvantage and need to be exported to print in another program.

SAVING REPORTS

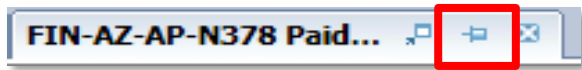
Reports can be saved to the Department’s On Demand folder or custom folders. Reports with data should not be saved in infoAdvantage.



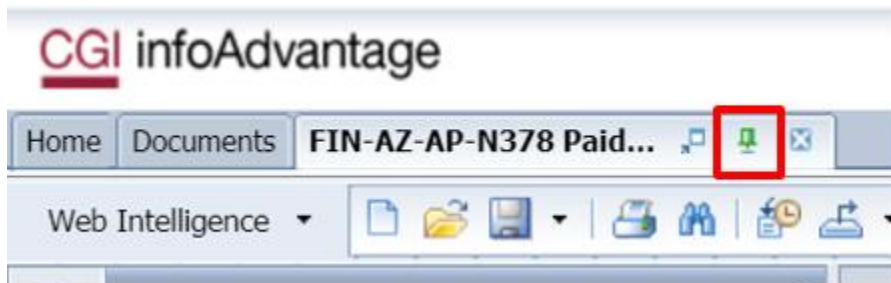
Section 5: More infoAdvantage Skills

PINNING REPORTS

Pinning reports is a quick way to allow a report to open up each time infoAdvantage is opened. After a report is opened, the report can be pinned by clicking on the pin on the report tab:



Pinned reports will have the “stuck” pin showing in green:



In order to unpin a report, just un-click on the pin.

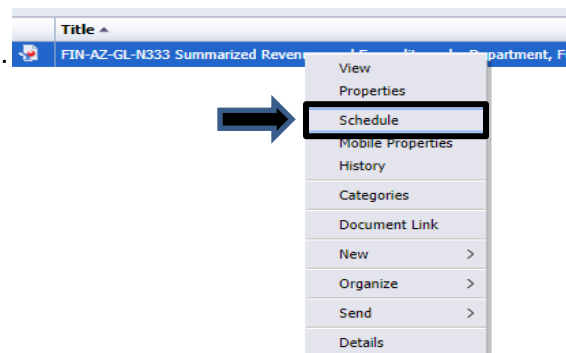
SCHEDULING

Sometimes a report may be large and take a while to run online or times out. If the report is large, users have the option to schedule the report to run in the “background” without having to wait for the report to run on the screen.

Reports cannot be scheduled from the Statewide Reports folder. Only reports in the Department On Demand Reports folder can be scheduled. A shortcut cannot be scheduled if it is linked to a Statewide Report. In order to schedule a report, the report must be in the Department On Demand Reports folders.

Scheduling a report will create an “instance” of the report. These instances are essentially a new copy of the report with the prompts and data saved.

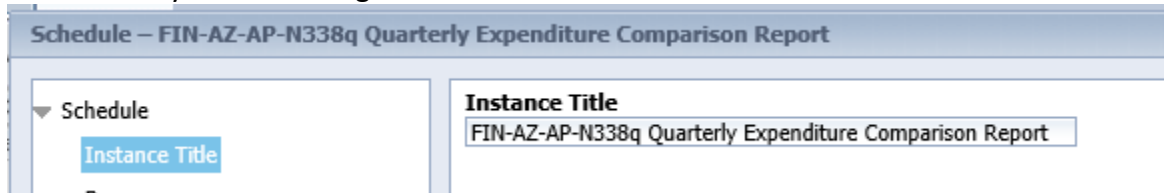
Right Click on the report and then click “Schedule”.



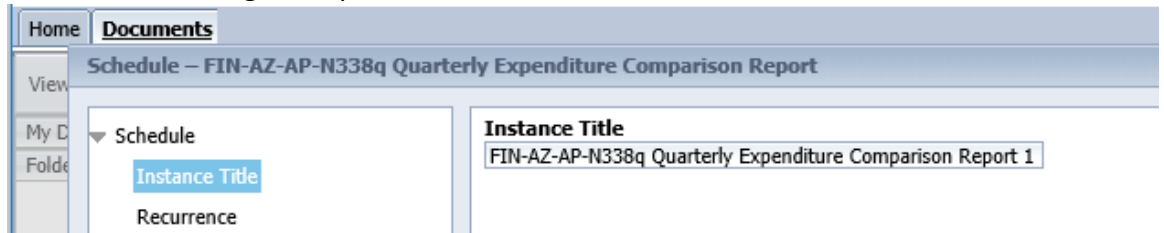
This will open a new window with the following options:

Instance Title

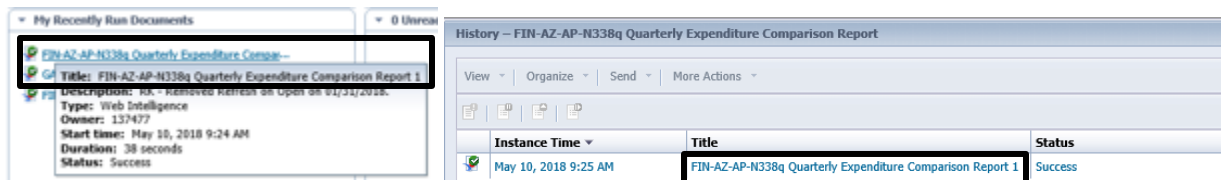
1. Instance Title (Report Name/Title) - each instance must have a unique name, either the user or the system will assign the name.



Defaults to the original report name as shown above.



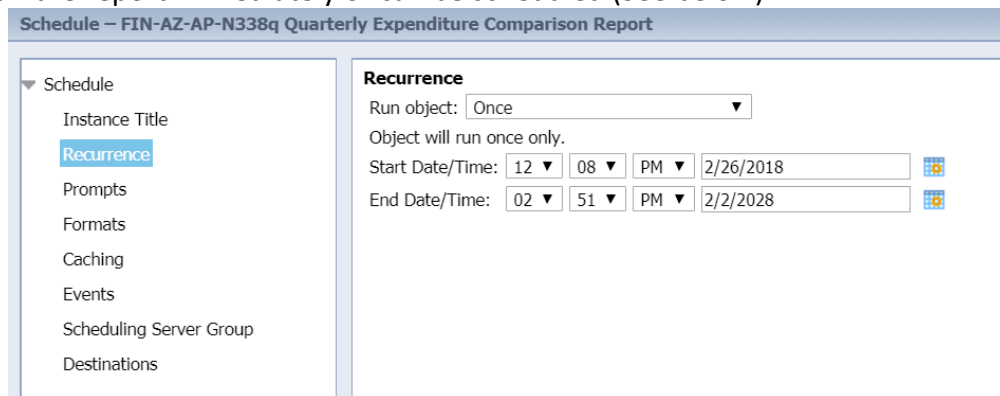
Name can be edited as shown above.



This is the title that will download to the “My Recently Run Documents” on the Home tab and the History window (shown above).

Recurrence

2. Recurrence – Determines when the report will be run. It can be run now or it can schedule it to run in the future, or even to run on a recurring basis. Default to “Now” to run the report immediately or can be scheduled (See below).

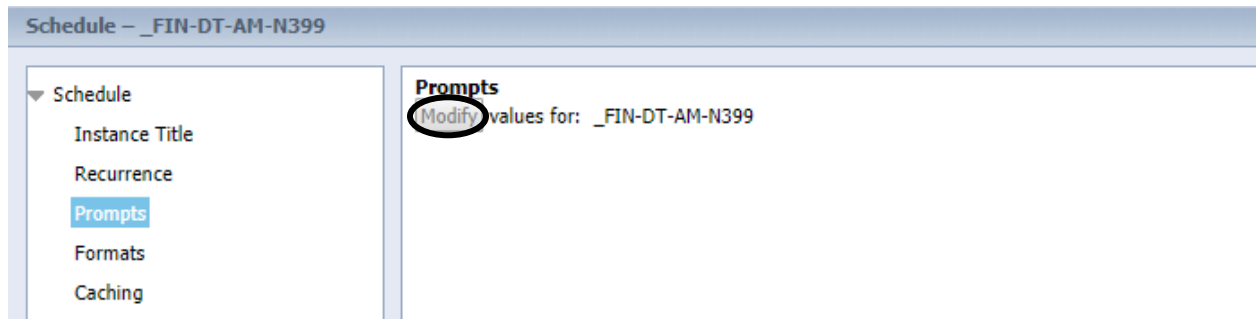


TIP:

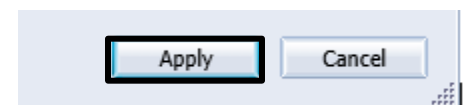
All reports need to complete by 8pm else will timeout and may show partial results.

Prompts

- Prompts – These are the prompts that the report will require to run. Enter the prompts by clicking on the Prompts and then clicking “Modify”. Prompts often take a few moments to appear, please be patient. The normal prompt input window will come up and the prompt responses may be chosen from there. When there are no prompts in a report, the “Modify” button will stay grayed out and will not allow a user to select it:

**TIP:**

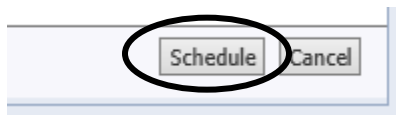
Patience needed during this step, prompt options may take a minute to load.



After entering prompts, select “Apply” in the bottom right section of the Prompts window.

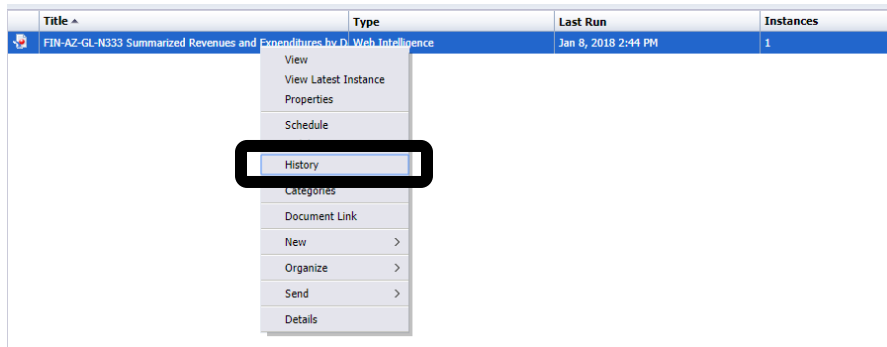
- Formats – It is recommended to leave the report in the Web Intelligence format
- Caching – This is not available to interactive users.
- Events – This has not been configured for interactive users. Please do not use this option.
- Scheduling Server Group – This is not available to interactive users.
- Destinations – Use the Default Enterprise Location. The scheduled report will show up in the default location of where the report was opened. This will create an instance in the report in the On Demand Reports folder.

Finish scheduling the report by clicking “Schedule” in the bottom right-hand corner.



History Window (Report Status)

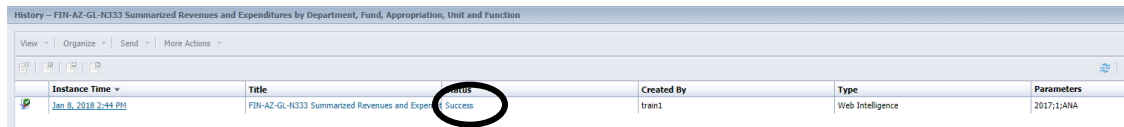
In order to see reports that have been scheduled, users can search through the History Window of the report by right-clicking on the report and selecting “History”:



A new window appears (the History window) it will show a pending status, when the report is processing it will be in a running status.



When the report is complete, the status will change to “Success”:



The History can be closed by clicking the X in the top right corner of the window. The History window will keep up to 5 instances of the scheduled On Demand reports which can be viewed at a later date. Opening a report that has multiple instances from the Department On Demand Reports folder will open the latest instance.

History – 4.12.17 OSPB_2

View | Organize | Send | More Actions

	Instance Time	Title	Status
	Feb 26, 2018 4:22 PM	4.12.17 OSPB_2 4	Pending
	Feb 26, 2018 4:21 PM	4.12.17 OSPB_2 3	Pending
	Feb 26, 2018 4:21 PM	4.12.17 OSPB_2 2	Success
	Feb 20, 2018 8:51 AM	4.12.17 OSPB_2	Success

TIP:
It is recommended that reports are exported and saved outside of infoAdvantage and scheduled instances be deleted from History.

Deleting instances

History – 4.12.17 OSPB_2

View | Organize | Send | More Actions

	Instance Time	Title	Status
	Feb 26, 2018 4:22 PM	4.12.17 OSPB_2 4	Pending
	Feb 26, 2018 4:21 PM	4.12.17 OSPB_2 3	Pending
	Feb 26, 2018 4:21 PM	4.12.17 OSPB_2 2	Success
	Feb 20, 2018 8:51 AM	4.12.17 OSPB_2	Success

History Status
 Organize >
 Pause
 Run Now
 Reschedule

Delete

Individual report instance limits can be increased by sending a request and reason to AFIS.Reports@AZDOA.gov.

TIP:
When a user leaves a Department, any recurring reports that the user had scheduled will no longer run. They should be copied and scheduled by another user still at the Department.

TROUBLESHOOTING

What if I don't see what I expect to see...?

Report doesn't analyze what I want it to, or not in the way I want it to.

Possible Causes	Possible Solutions
<ul style="list-style-type: none"> ▪ Mismatch in the data entered ▪ Data hasn't posted yet 	<ul style="list-style-type: none"> ▪ A different report might be better ▪ Check with co-workers to ensure the data is correct

WAY too much data was returned.

Possible Causes	Possible Solutions
<ul style="list-style-type: none"> ▪ Criteria is too broad 	<ul style="list-style-type: none"> ▪ Enter more criteria in the prompts to narrow the data ▪ Make sure to use the query filters

NO data was returned.

Possible Causes	Possible Solutions
<ul style="list-style-type: none"> ▪ Mismatch in the data entered ▪ caps not used when should be CAPS ▪ The report needs to be refreshed ▪ Data hasn't posted yet ▪ Data is pre-2016 ▪ There is really no data 	<ul style="list-style-type: none"> ▪ One of the key elements to success with reporting in infoAdvantage is knowing your data: how your agency set it up, what fields the data is found in, what the values are. ▪ Another key element is to communicate. If you're the report specialist, but don't have AFIS knowledge, talk with your finance people. ▪ You won't get the data you need if you don't know what to ask for.

REQUESTING A CUSTOM REPORT

Sometimes there isn't a report that meets the Department needs. Users have the option of requesting that a custom report be developed by Report Developers within the Department. If a Report Developer does not exist at the department or a complex report is needed, another option is to submit a Change Request form to the General Accounting Office. Email AFIS.Reports@azdoa to request a copy of this form.

If the Department thinks that a custom report is needed, please:

1. Search infoAdvantage to ensure that no current report is available.
2. Find a similar report to provide as a starting point for the Developers.
3. Email AFIS.Reports@azdoa.gov to request a copy of the Change Request form
4. Get proper authorization from your Department to submit the Change Request and provide as much detail on form.

REPORTING ISSUES WITH A REPORT

For a report located in the Department On Demand Reports folder, find the creator by showing the "Created by" (set in preferences as discussed earlier in this course) and request analysis.

For a report in the Statewide folder, email AFIS.Reports@azdoa.gov and provide as much detail as possible about the reporting issue. Also include the report name, location, time and date ran, and the prompts used.

Section 6: Staying Up to Date

Reports in the Statewide Reports folder are maintained by the GAO. The Statewide reports may be updated, changed or enhanced and new reports developed. In addition, security changes may be implemented or data updated in the system. It is important to Sign-Up for updates from GAO to stay informed.

Go to: <https://gao.az.gov/register-updates>



Sign-up and stay up to date with all of the information that GAO sends out to users.

Register for Updates

Email Address *

First Name

Last Name

Agency

Title

Work Phone Number Extension

E-Newsletter *

- Arizona Financial Information System (AFIS)
- CFO Meetings & Communications
- GAO Financial Reporting & infoAdvantage
- GAO Policy & Procedure
- GAO Training & CPE Events
- Statewide Payroll & Related Information
- Travel Policies & Procedures

Appendix: Toolbar/Menu chart

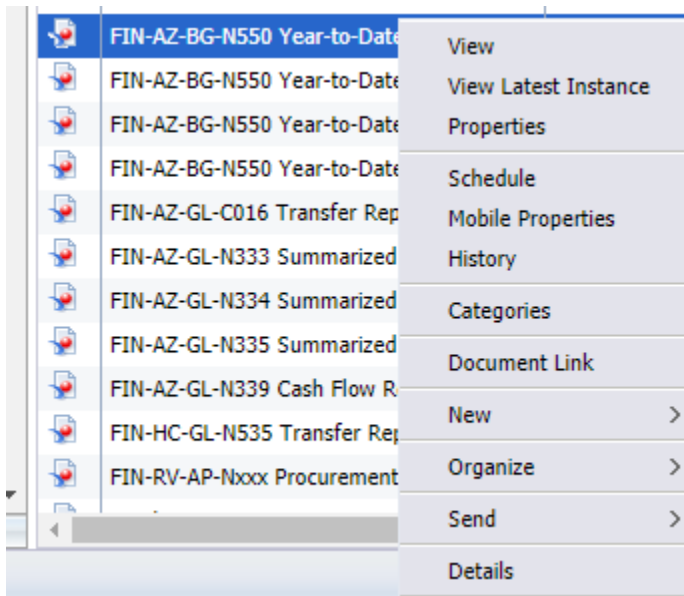
STANDARD TOOLBAR



Icon	Description
View	Another way to open a report. Can also view the selected report's properties from here.
New	Create a new folder or other element. Only available when it is allowable.
Organize	Save, cut, copy, or delete selected item. The commands are different based upon what is selected.
Send	Not functional.
More Actions	Other commands customized based upon what is selected.
Details	Displays side panel that shows property information about the selected report.

ON DEMAND REPORT CONTEXT MENU

Right click on a report in the Department On Demand folder to see the menu below.



On-Demand Report Context Menu			
Menu Item	Sub Menu Item	Description	Statewide Reports
View		Open for Viewing	X
Properties		Shows Create Date, Modified Date, and Full Title of Report	X
Schedule		Use to schedule a report	
Mobile Properties		Currently Not In Use	X
History		History opens up the list of dates corresponding to the instances when the document was scheduled	X
Categories		Currently Not In Use	X
Document Link		Currently Not In Use	X
New	Local Document	Currently Not In Use	
	Publication	Currently Not In Use	
	Hyperlink	Currently Not In Use	
	Folder	To create a new folder within On-Demand folder	
Organize	Copy	Use to copy & paste a report in On-Demand folder to schedule	X
	Copy Shortcut	Use to put a report in On-Demand folder and always have the most current version	X
Send	BI Box	Currently Not In Use	
	Email	Currently Not In Use	
Details		Shows a summary of the report	X