



# **infoAdvantage Interactive Reporting**

## **Participant Guide**

Version 1.1

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

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## What can I expect from this course?

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The *infoAdvantage Interactive Reporting* class is a four-hour course designed for users who have Interactive Report User access in infoAdvantage. This course focuses on the activities required to run interactive (on-demand) reports using infoAdvantage.

infoAdvantage has two kinds of reports:

- Published reports that are automatically “burst” to the appropriate folders
- Interactive (on-demand) reports that are run using the prompt inputs.

This course focuses on Interactive or On-Demand Reports, and how to get the most out of them.

### COURSE GOAL AND OBJECTIVES

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As a result of this class you will be able to run interactive reports in infoAdvantage to retrieve financial data that supports your agency’s business.

You will be able to:

- Select the best report to meet the need by using the *AFIS Reports Reference Guide* and searches within infoAdvantage
- Consistently run reports that retrieve essential data
- Export and print reports
- Save reports for future use and retrieve them when needed.
- List the steps required to request a custom report

### AGENDA AND TOPICS

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Section 1 – Overview and Introduction

Section 2 – *AFIS Reports Reference Guide*

- Finding reports in the *AFIS Reports Reference Guide*
- infoAdvantage environment
- Finding reports in infoAdvantage

Section 3 – infoAdvantage Interactive Reporting

- Opening and running Reports
- Entering criteria (aka “prompts”) for the data the report should show
- Exporting and printing reports

Section 4 – More infoAdvantage Skills

- Folder management
- Saving reports for future use
- Toolbar and other menu options
- Requesting a custom report

Section 5 – Course Summary and Assessment

## **ASSESSMENT**

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At the end of the class, you will be completing a demonstration of proficiency to prove to yourself that you can do the things we said that you would be able to do. This Assessment will consist of running three reports based on scenarios we give you. In order to show proficiency, you will need to successfully complete two out of the three scenarios.

## Introduction to Interactive Reporting

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There are two type of reports available in infoAdvantage: published and on-demand, or interactive. The on-demand reports are called interactive, because the user can interact with the report by using prompts to seek specific data. Published reports are pre-defined and the user does not enter prompts.

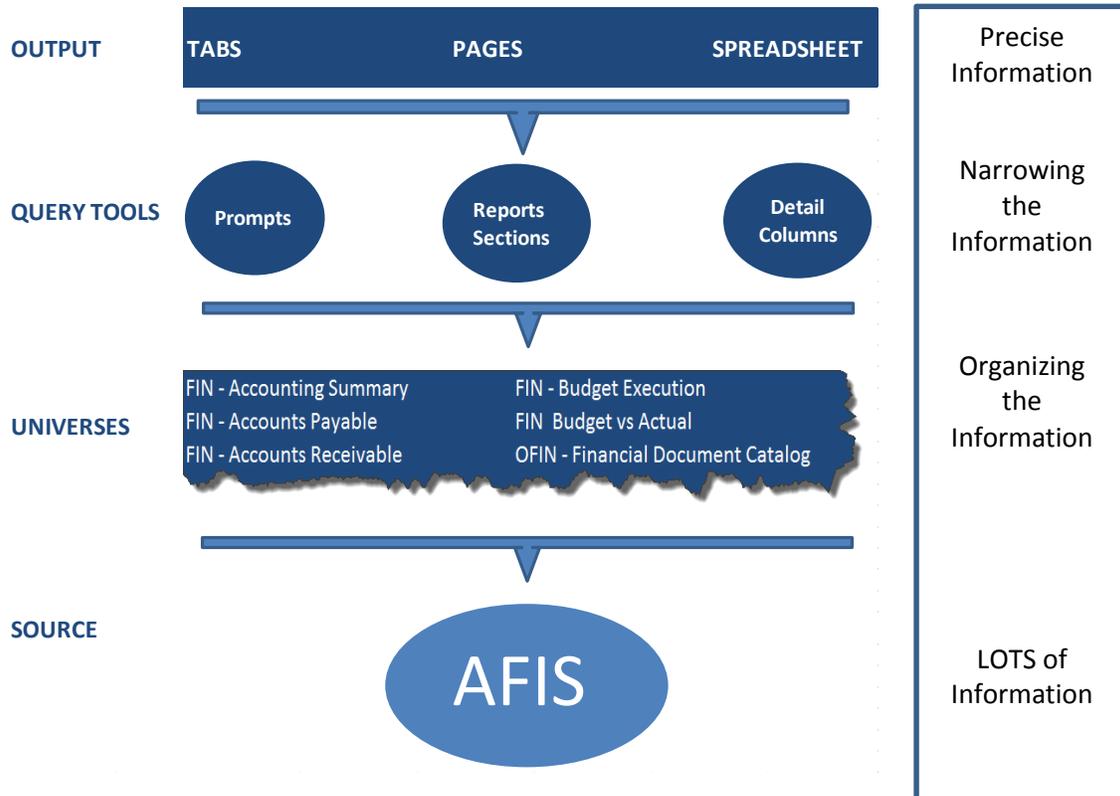
Published Reports	Interactive Reports are:
<ul style="list-style-type: none"><li>▪ Run nightly, monthly, quarterly, or annually</li><li>▪ Automatically post to Agency folders (are “burst” to the folders)</li><li>▪ Are the responsibility of Agencies once published</li></ul>	<ul style="list-style-type: none"><li>▪ Are run on demand</li><li>▪ Allow you to define criteria (“prompts”)</li><li>▪ Supplement published reports</li><li>▪ Can be saved for future use</li></ul>

**TIP:** Most published reports can also be run on-demand. The difference is that the published report shows information that matches the prompts that were pre-set; when you run the report on demand, you’re able to enter the prompts to get a different set of information. For example, there might be a published report that is normally run (updated) monthly, but you might need to see the data as of today.

## REPORT STRUCTURE

All infoAdvantage reports are based on the data that has been entered and is stored in AFIS.

The graphic below shows how your data gets from AFIS to the report you see. The top two levels are where we get involved; where we are refining the information that we ultimately see.



**TIP:** There is no need to reconcile data between the reports and AFIS: it all comes from the same place!

## Sample Report

All reports begin with a cover page.

**Prompts** reflect the fields that you can enter criteria for AND the specific criteria you entered. If a prompt is blank, it wasn't used.

Report ID : FIN-AP-0004  
Run Date : 11/23/2015  
Run Time : 1:47:49 PM

CGI Advantage  
Open Items Report - Pre-Encumbrances  
Fiscal Year 2016, Accounting Period 1

Cover Page      Report Header

Parameters and Prompts

Accounting Period	1
Fiscal Year	2016
Fund	

Criteria you select (aka "prompts")

Report Description  
This Report is a detailed listing of open Pre-Encumbrance documents with a fiscal period cutoff.

Subsequent pages show the data that you searched for.

**Sections** reflect data that is grouped together. For example, a report that has FUND in the section, would group and summarize all the records for Fund 1000 together, then Fund 1300 together, etc.

**Detail Rows** reflect transaction detail or summary lines that meet the criteria of the user-selected prompts and the Sections that group the detail rows.

**Columns** reflect data from AFIS for the selected fields.

Report ID : FIN-AP-0004		CGI Advantage				Page 1 of 547					
Run Date : 11/23/2015		Open Items Report - Pre-Encumbrances									
Run Time : 1:47:49 PM		Fiscal Year 2016, Accounting Period 1									
Fund	1000 - GENERAL FUND	} Sections				Columns					
BSA	- NOT ENTERED										
Document	Document Reference	Document Date	BFY	CL	AL	Dept	Unit	Obj	Vendor Code	Vendor Name	Amount
RQPZ1,AGA,RQ000000 9884		07/23/2015	2016	1	1	AGA	6E02	6297			175.00
		07/23/2015	2016	2	1	AGA	6E02	6297			720.00

# AFIS Reports Reference Guide

There more than 200 reports available in infoAdvantage. There are two resources available for finding the report that you need: the *AFIS Reports Reference Guide*, and infoAdvantage itself.

## FINDING REPORTS IN THE *AFIS REPORTS REFERENCE GUIDE*

The *AFIS Reports Reference Guide* can be found on the General Accounting Office’s website:

**General Accounting Office (GAO) website > AFIS > Report Reference Guide**



The *AFIS Reports Reference Guide* lists published and interactive reports, and allows you to look for the kinds of reports you want by searching:

- The folder or functional area the reports might be found in.
- Run frequency (published and run monthly, daily, quarterly, annually; or on-demand).
- The prompts that you can use to refine data.
- The fields you can group by (sections) and the fields you want to see (columns.)

Home

### AFIS infoAdvantage Reports

From this page you can find information about any of the AFIS reports that are generally accessible through InfoAdvantage, Maximo, TRIRIGA, or Advantage. Use the exposed filters to narrow the list of reports. Click on a Report ID to see a full page of information about the report, including a sample screenshot of its layout.

**Folder** 
**Run Frequency** 
**Prompts** 
**Report Sections and Columns** 
**Universes**

Report ID	Description	Prompts	Sections	Display Fields	Universes
FIN-AP-0004 Open Items Report - Pre-Encumbrances	This Report is a detailed listing of open Pre-Encumbrance documents with a fiscal period cutoff	Fiscal Year (Mandatory), Accounting Period (Mandatory), Fund	Fund, Balance Sheet	Document, Document Reference, Document Date, Budget Fiscal Year, Customer Line, Accounting Line, Department, Unit, Object, Vendor Code, Vendor Name, Amount	FIN - General Accounting

You can search for more than one Prompt field, and more than one Report Sections and Columns field.

**TIP:**

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You can retrieve more information about any of the reports by clicking the Report ID link for the report. The full description of the report will appear.

Home

## FIN-AZ-BG-N147

**Report Name:** Department Budget Control by Program, Division, and Unit  
**Report Description:** Program Budget Expenditure and charges listing by Program, Division, and Unit.  
**Folder:** Budget Control  
**Universes:** FIN - Accounting Summary  
 FIN - Budget vs. Actual  
**Prompt List:** Fiscal Year (Mandatory)  
 Accounting Period (Mandatory)  
 Department(s) (Mandatory)  
 Major Program  
 Program  
**Section List:** Department  
 Major Program  
 Program  
**Display Fields:** Division  
 Unit  
 Object  
 Object Short Name  
 Program Current Budget  
 Prior Year Expenditures  
 Current Month Expenditures  
 Year-to-Date Expenditures  
 Pre-Encumbrance/Encumbrance Outstanding  
 Charges  
 Remaining

**Report Sample:**

Division	Unit	Object	Object Short Name	Program Current Budget	Prior Year Expenditures	Current Month Expenditures	YTD Expenditures	Pre-Encumbrance/Encumbrance Outstanding	Charges	Remaining
2000	2191	0011	Regular Base Sa		0.00	0.00	0.00	0.00	173.34	
2000	2464	4300	Emergency Fund		0.00	0.00	0.00	0.00	275.46	

**Individual Exercise 2.2**

You need to find open encumbrances, where *Program* is one of the columns, and you want to specify which *Budget Fiscal Year* to look in.

**Where I looked for Program (circle):**

Folder                  Run Frequency                  Prompts                  Sections and Columns

**Number of Reports Returned:** \_\_\_\_\_

**Where I looked for Budget Fiscal Year (circle):**

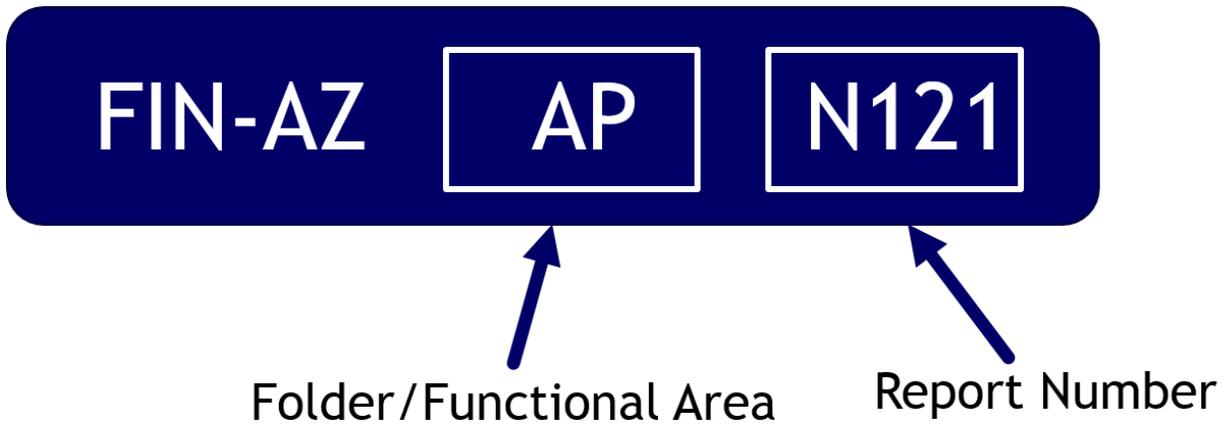
Folder                  Run Frequency                  Prompts                  Sections and Columns

**Number of Reports Returned:** \_\_\_\_\_

**Report I ended up with:** \_\_\_\_\_



A Note on Report Names and Numbers

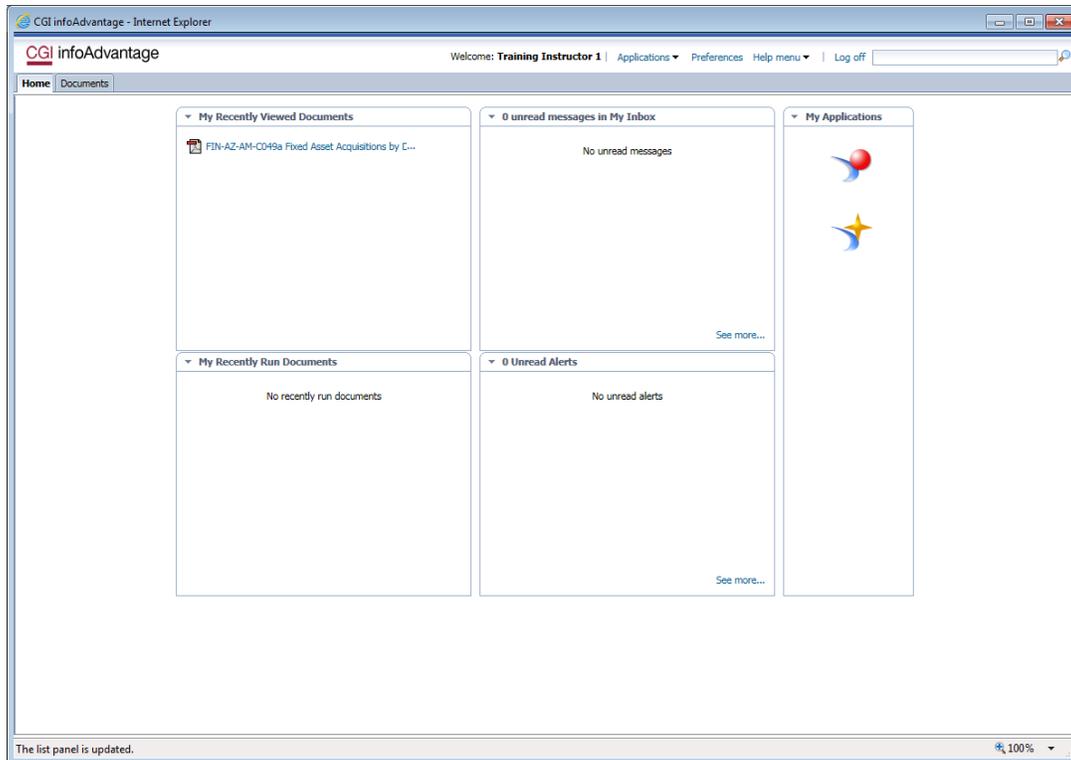


Folder	Functional Areas
Accounts Payable	AP
Accounts Receivable	AR
Asset Management	AM, FA
Budget Control	BC, BG
Cost Accounting	CA, GM, PA
Cash Management	CM
Document Catalog	DCAT
Document Message	MSG
Debt Management	DEBT
General Ledger	GL, GA
Security and Workflow	SEC, WF

## FINDING REPORTS IN INFOADVANTAGE

You get to infoAdvantage from within 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.



### infoAdvantage Environment

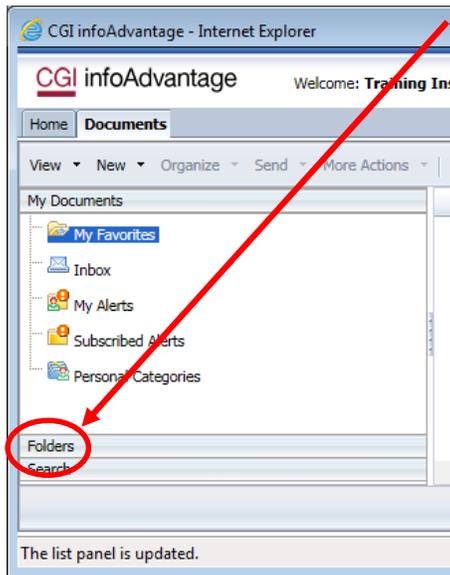
There are two tabs.

**Home** is your personal page. The sections on the Home page make it easy to get to recently used reports and messages.

**Documents** is where you will find all of the reports, and where you will spend the majority of your time.

When you first open the Documents tab, **My Documents** will appear. My Documents is a repository for frequently used reports, messages, and alerts. You can save reports you use most frequently into *My Favorites* for easy retrieval.

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



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

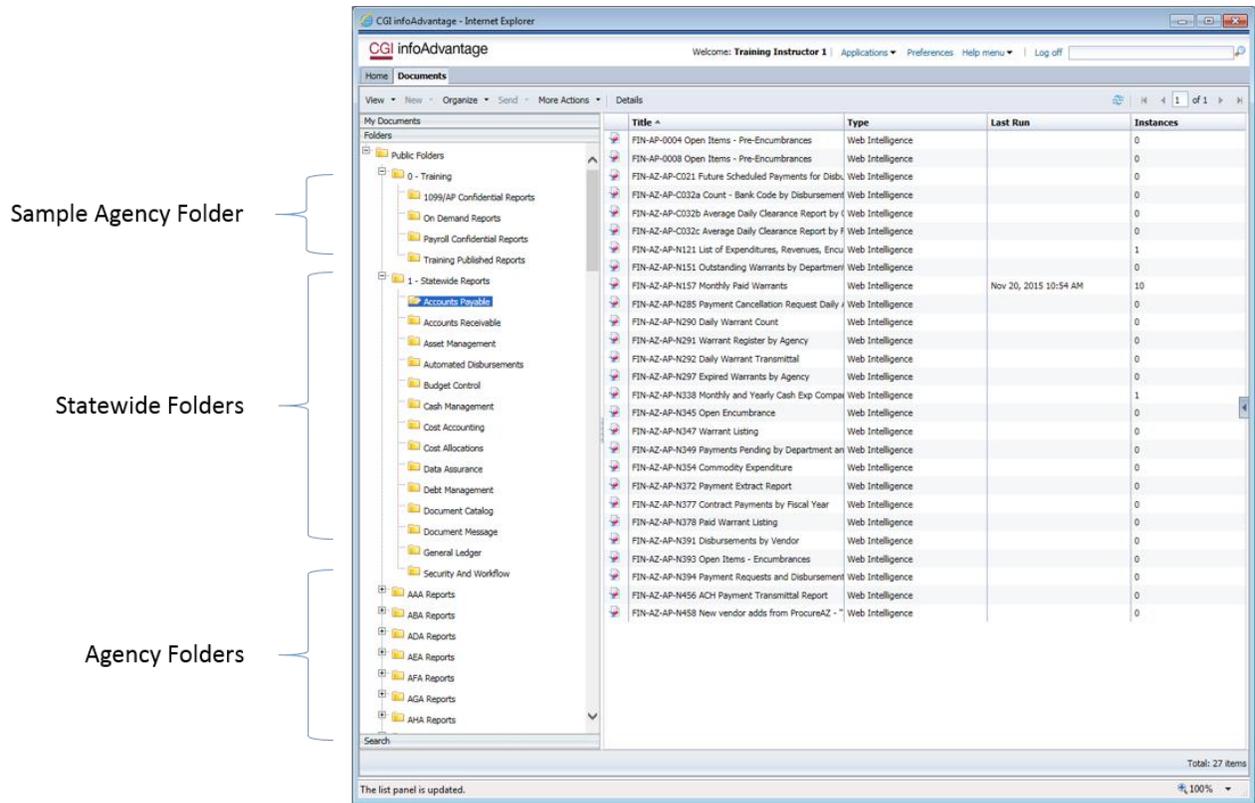
### Folder Overview

All reports are located within folders within infoAdvantage. Folders are organized into subfolders. The folder structure is helpful in finding the reports you need.

- Statewide Reports folders contain On Demand reports and are organized by functional area.

*TIP: Remember that the report name gives us a clue to the functional area/folder the report can be found in!*

- In addition to the Statewide Reports folders, each agency has Published Reports and On Demand Reports folders. The agency folders are intended to make it easy for users to find the reports that their agency uses, whether those are published reports, on-demand reports that are used by many users within the agency, or custom reports. Users can save reports that they originally found in the Statewide Reports into their agency's folder so that they reports are easy for others in the agency to find and use.
- My Favorites, under My Documents, can also be used for reports that you yourself use frequently.



### Navigating, Sorting and Filtering

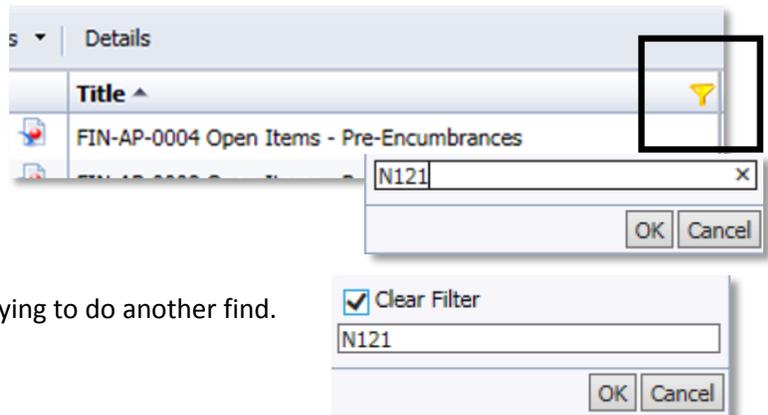
Navigation in infoAdvantage is similar to that of other programs.

- Use the + and – next to the folder to expand and collapse the folder

To navigate through the folders and subfolders:

- 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 your mouse over the right section of the column header. Click the symbol to expand the filter menu.



- Don't forget to clear the filter before trying to do another find.

**Individual Exercise 2.5**

Find the first report you searched for in the previous section

**Individual Exercise 2.6**

Find the second report you searched for in the previous section

**Section Review**

True or False?

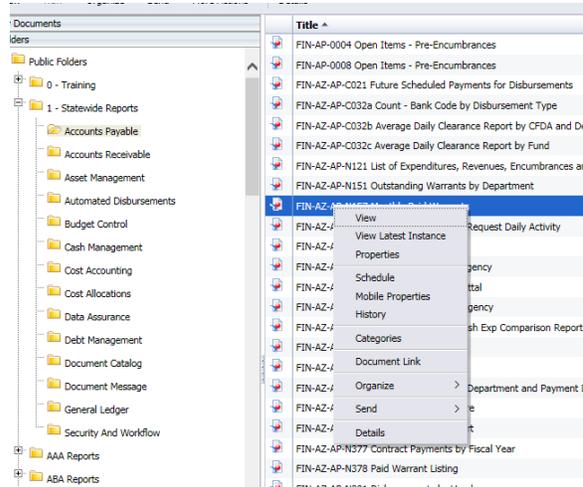
The <i>AFIS Reports Reference Guide</i> allows users to search for both Published and On Demand infoAdvantage reports	T	F
I can run some Published reports on demand if I need to	T	F
Reference Guide searches can be based on Prompts, Report Sections or Column Headers, type of report, and folder where the report can be found	T	F
infoAdvantage folders are organized for effective searching	T	F
Reports can be sorted and filtered within a folder	T	F
I can figure out which folder to look in using the Report Number	T	F

# Interactive Reporting

## OPENING AND RUNNING A REPORT

There are four basic steps to running a report.

1. Open the report, either by double-clicking the report or right-clicking and choosing "View".
2. Refresh the report, if necessary.
3. Enter the criteria you are looking for into the prompts.
4. Run the report.

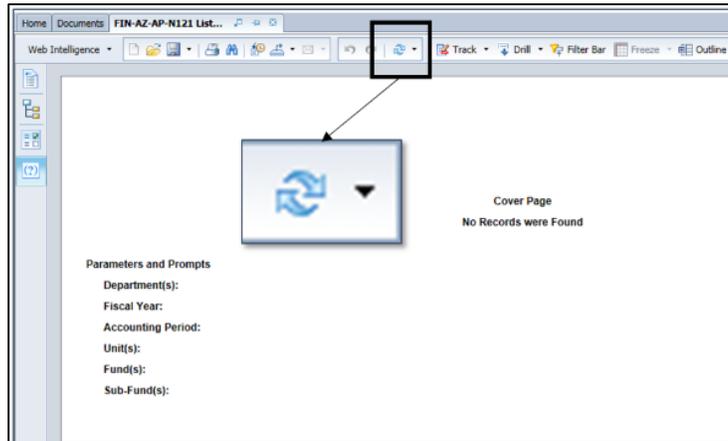


### Refresh the Report

Sometimes you first open a report the cover page will say No Records Found.

#### DON'T PANIC!

Simply refresh the report to initiate the prompts. Fill in the prompts to retrieve the data.



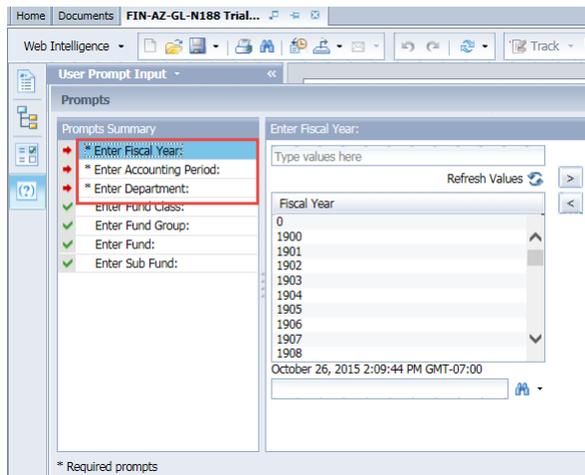
## Prompts

Each report has a different set of prompts based upon the purpose of the report and its underlying data.

There are two ways to enter criteria in prompts: the recommended way is using what is called the Advanced Prompt form. (The other way can be found in the next section of this guide.)

### Advanced Prompt Form

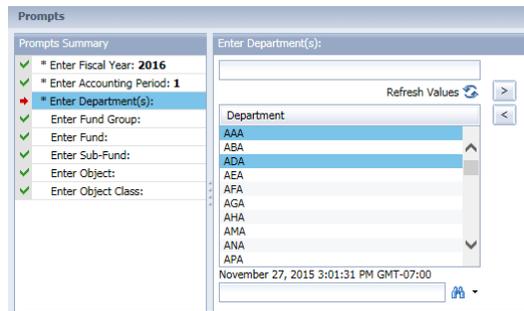
The Advanced Prompt form may appear automatically when you open the report (depending upon the report) and will appear when you Refresh the report.



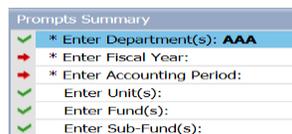
Prompts that have a  in front of them are required.

Prompts that have a  are optional. You can use them to further refine what you're looking for.

When there is an (s) after the prompt name, you can enter or select multiple entries by using **Shift-Click** to select items in a row, or **Ctrl-Click** to select contiguous items.



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



**Entering Criteria into the Prompts**

What you enter in the prompts defines the data that is returned, and it's very important to enter the "right" criteria.

- **infoAdvantage is case sensitive.** *ada* is *not* the same as **ADA**. If you enter *ada* instead of **ADA**, no records will be returned. Case matters! (AFIS automatically converts data fields to uppercase for you, but infoAdvantage does not.)
- **infoAdvantage does exact matches.** You have to know your agency's data and how it was entered so that you can enter matching criteria. If in doubt, talk with your financial teams about how the data was entered.

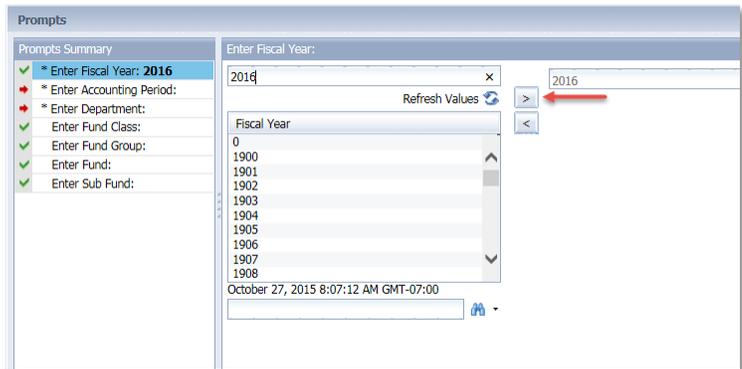
To enter the criteria in the form:

1. **Type** an entry into the prompt

or

**Select a value** from the list provided.

2. **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.)



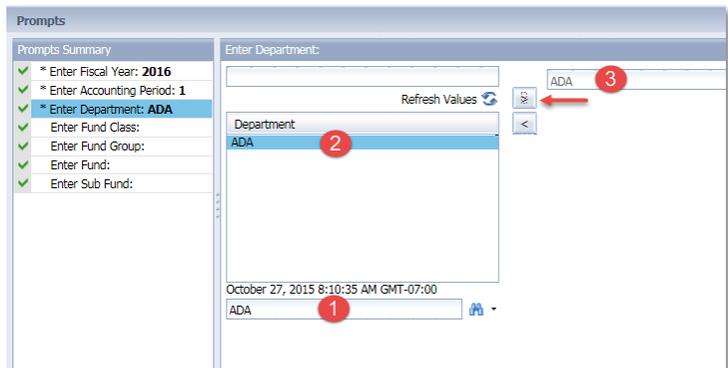
You can do a search to narrow the list of values that are provided, too.

1. **Type** what you want to find in the Find box (1).



2. **Click the** (binoculars) button to find matching values.

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

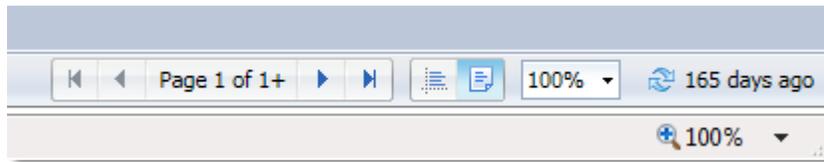


## Running the Report

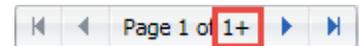
To run the report, simply **click OK** from the Advanced Prompt form. The report will run and return data based upon the prompts you entered.

## NAVIGATING THE REPORT

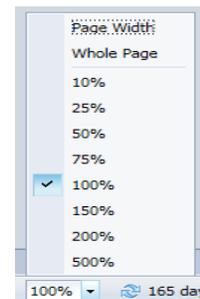
Navigating an infoAdvantage report is similar to navigating in other documents and programs.



Page navigation shows at the bottom of the report window. More than one page will be indicated by a 1+.



The view can be scaled using the Zoom control



Back  and forward  buttons move you through the pages.

Quick display view  shows the current page only; the Page  view shows all the pages



Multiple reports can be open

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.

And the report itself may have multiple tabs



### Individual Exercise 3.2

- Find and run the *FIN-AZ-BG-N149: Appropriation Budget Status Excluding Pre-Encumbrances* report using the following criteria.

**Fiscal Year:** 2016

**Accounting Period:** 1

**Department** ADA

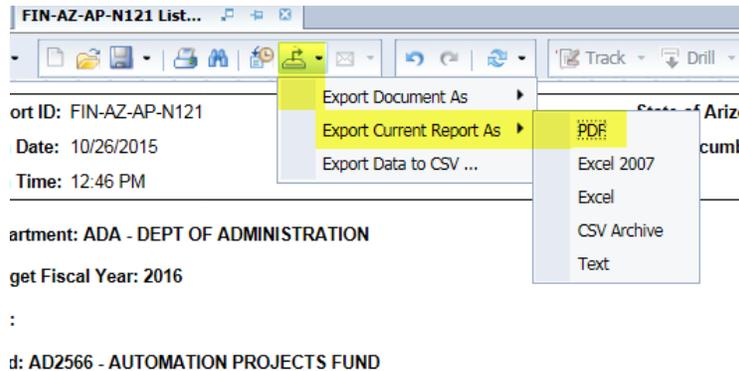
**Budget Fiscal Year:** 2016

## EXPORTING AND PRINTING THE REPORT

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### Exporting

You have the choice of exporting Document or Current Report as Excel or PDF.



**DON'T EXPORT TO CSV!**

**Exporting Document** and **Exporting Current Report** usually accomplish the same thing, however:

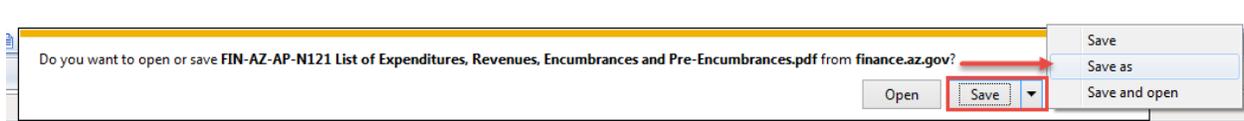
- **Export Document** is used when there are multiple tabs.

*TIP: If one of the Tabs is Excel, Export Document to Excel 2007 rather than PDF in order to be able to manipulate the Excel data.*

- **Export Current Report** is used when there is a single tab in the report, or if you want to export/print just a single tab of a multi-tab report

To export the report:

1. Open the report.
2. **Click** the Export button. 
3. **Select** *Export Document As* or *Export Current Report As*
4. **Select** PDF or Excel 2007. (Excel is for Excel 97/2003).
5. **Open, Save, or Save As** the document.



## Printing

Reports are exported first in order to print: they don't print directly from infoAdvantage.

### Individual Exercise 3.5

Export report FIN-AZ-AP-121: Expenditures, Revenues, Encumbrances and Pre-Encumbrances by Department as a PDF to your Desktop.

I used (circle)    Export Document            Export Current Report

Because \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### Individual Exercise 3.7

You are looking for a warrant that was issued on August 3, 2015. Use Report FIN-AZ-AP-N378.

1. Find and run the report using the following prompts:

**From Issue Date: 8/3/2015**

**To Issue Date 8/3/2015**

**Bank: BK01**

**Department: ADA**

2. Find the payment for Verve Chiropractic and Associates, Inc.

The Warrant Number is \_\_\_\_\_

For \$ \_\_\_\_\_

### Individual Exercise 3.8

You have been asked to report on budget activity for the different *Divisions* within your *Department*. You need to see which *Object Groups* the activity is associated with. When asking for the report, your manager said to find the report that replaced the legacy AFIS report DAFR7210.

1. Find and run the report using the following prompts:

**Department: AAA**

**Fiscal Year: 2016**

**Accounting Period: 1**

2. Export the Report as PDF to the Desktop and open it.

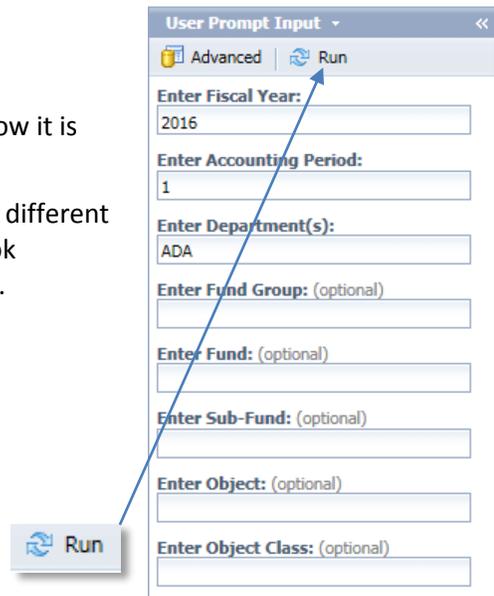
## PROMPTS, REVISITED

Although the Advanced Prompts form is the recommended way to enter prompts, there is another option.

The Sidebar Prompt Menu allows you to enter in criteria without going through the form. It can go more quickly than the Advanced Prompts menu, but, as it doesn't give you any lists to choose from, it requires that you know exactly what you're looking for.

The Sidebar Prompt Menu is useful when:

- You're fairly confident in infoAdvantage
- You already know what criteria you want AND how it is entered in AFIS
- You want to run the report more than once with different sets of criteria, for example, if you wanted to look different Accounting Periods one after the other.



If using the Sidebar Prompt Menu, don't click Refresh on the top toolbar. Instead click **Run** from the Prompt menu.

### **Individual Exercise 3.10**

You are looking for a warrant for \$640 to Arizona Sign Language Interpreting for the Deaf that you think was paid during the first week of August 2015, but it could have been the last week of July or even the second week of August. Your agency is ADA.

1. Find and run the report to search the first week of August, 2015.
2. Look to see if the warrant is listed.
3. If not, change the prompts to look in the second week of August or the last week of July.
4. When found, write the date the warrant was paid in your guide.

**Section Review**

True or False?

How I enter the information in the prompts is important.	T	F
Once I run the report, I lose track of what information I entered at the prompts.	T	F
I have to enter information in all of the prompts.	T	F
If there is an "(s)" after the prompt, I can enter multiple values.	T	F
I should export reports to CSV.	T	F
I must always use Refresh and the Advanced menu to run my reports.	T	F
If my report has multiple tabs, I have to export them one by one.		
To print, I must first export the file.		

# More infoAdvantage Skills

## MANAGING FOLDERS

Earlier we saw that each Agency has its own folder, under which are more folders for Published Reports and On-Demand reports. Within those folders, the Agency can choose to add more folders according to any pattern they would like.

In addition, each user has his or her own My Favorites folder that can be organized any way he or she would like.

### Adding a Folder

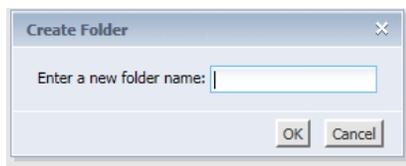
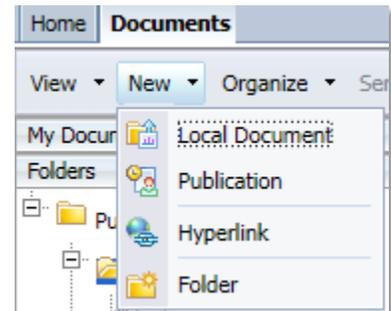
Adding a folder in infoAdvantage is similar to that of other programs. You can add as many folders as you want and organize them in any you want under My Favorites.

But when it comes to adding folders to the Agency folders...

### ASK FIRST!

To add a folder:

1. **Select** the “parent” folder, under which you want the new folder to go. (Note that you cannot create folders under parent folders you don’t have permissions to.)
2. **Click** the New button.
3. **Select** *Folder*.
4. **Enter** the name of the new folder.
5. **Click** *OK*.



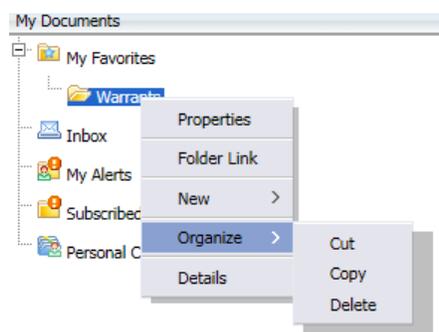
### Deleting a Folder

You can delete folders from My Favorites, but cannot delete any folders that you do not have permission to in the agency folders. It is a good idea to periodically clean up the folders and reports created and saved. But if you are cleaning up Agency folders,

### ASK FIRST!

To delete a folder:

1. **Right click** on the folder you wish to delete.
2. **Click *Organize***.
3. **Click *Delete***.
4. **Click *OK*** to confirm the deletion.



### **Individual Exercise 4.1**

You will be looking up warrants—open and paid—on a regular basis. There are multiple reports related to warrants, and you want to have a central place to find them.

1. Create a new folder in My Favorites called “Warrants”
2. Observe that the folder was successfully created.

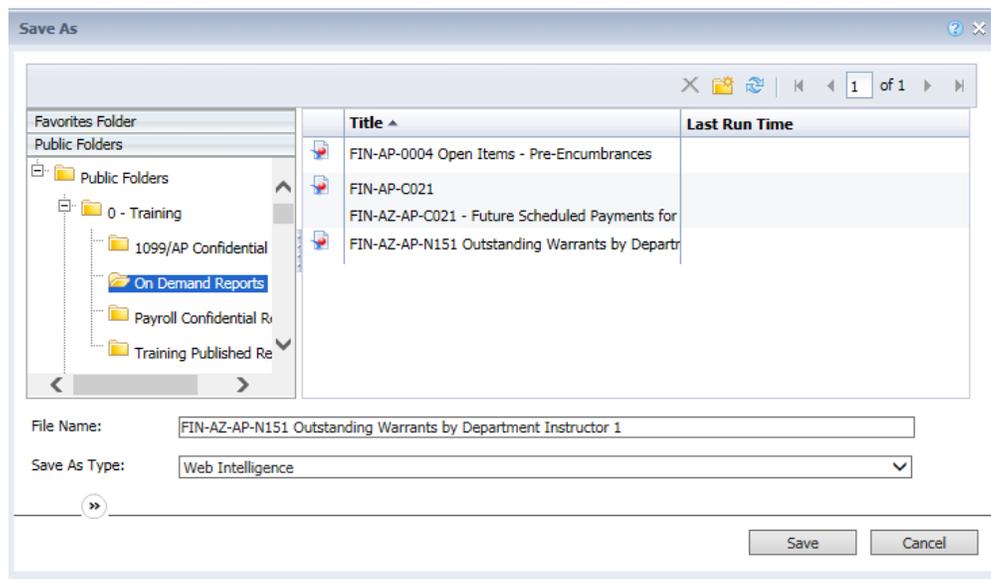
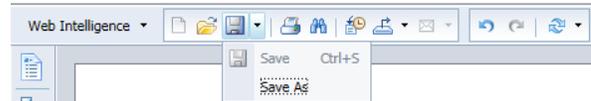
## SAVING AND RETRIEVING REPORTS

You can save reports to My Favorites or your Agency's folders to use in the future. This is a good way to organize reports that you use frequently. You will still need to enter the criteria each time.

### Saving a Report

To save a report:

1. **Open** the report you want to save.
2. **Click** the Save button.
3. **Select** *Save As* (or *Save*, if you have previously saved the report.)



4. **Select** the folder into which the saved report should go.
5. **Enter** or confirm the *File Name*.
6. **Click** *Save*.

### Retrieving a Report

The next time you wish to use the report, navigate to the folder in which you saved the Report, and open and run it from there.

## Individual Exercise 4.2

You will be regularly looking up outstanding warrants for our agency, and want to save it to your Favorites to get to quickly each time.

1. Open and run FIN-AZ-AP-N151 using the following prompts:

**Fiscal Year:** 2016

**Accounting Period:** 1

**Department:** ADA

2. Save the Report to Favorites as *FIN-AZ-AP-N151 Outstanding Warrants by Department* [Your Initials]
3. Open and Run the Report from My Favorites

## Managing a Saved Report

Saving is actually taking a copy of the report definition so that you can reuse it. The original report doesn't go away. That means that you can copy, move, or even delete a report that you have saved to one of your folders without affecting the original, master report found in the Statewide folder. For example, if you saved *FIN-AZ-AP-151* to your folder, and then deleted it, the original *FIN-AZ-AP-151* would still be found in the Statewide-Accounts Payable folder.

The Organize menu enables you to cut/paste and copy/paste a saved report to a new location. You can also Delete a report from the Organize menu.

To display the Organize menu:

1. Navigate to the folder where the report is stored.
2. **Right-click** the report.
3. **Click** or hover over *Organize*.

**Individual Exercise 4.3**

1. Delete the saved report from the Warrants Folder in My Favorites
2. Delete the Warrants Folder from My Favorites.

## TROUBLESHOOTING

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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

**WAY too much data was returned.**

Possible Causes	Possible Solutions

**NO data was returned.**

Possible Causes	Possible Solutions

## Tips:



- Know your data and agency set up
- Talk to one another

## WHEN A CUSTOM REPORT IS NEEDED

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Sometimes there really truly isn't a published or on-demand report that does exactly what your agency needs it to do. Custom reports can be developed by AFIS Report Developers within your agency, or your agency can put forward a Change Request for the State's Report Developers to create. The latter is a last resort, and only certain individuals within your agency can submit the request.

If you think that a custom report is needed, please:

1. Use the Reports Reference Guide to ensure that no current report is available.
2. Ask your colleagues about what they are doing to retrieve the data, or for tips and tricks.
3. If there really isn't a report, find one that is as similar as possible to provide as a starting point for the Developers.
4. Contact your agency's Agency Coordinator for next steps. The Agency Coordinator will decide the best course of action.

**Section Review**

Why would you want to create customer folders?

Why would you want to save reports?

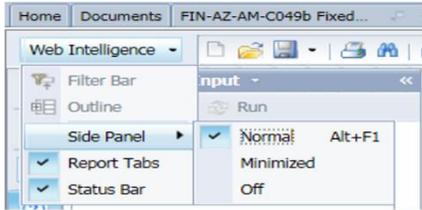
How do you add a folder?

Should you add folders willy nilly?

What should you do BEFORE requesting a custom report?

# Appendix

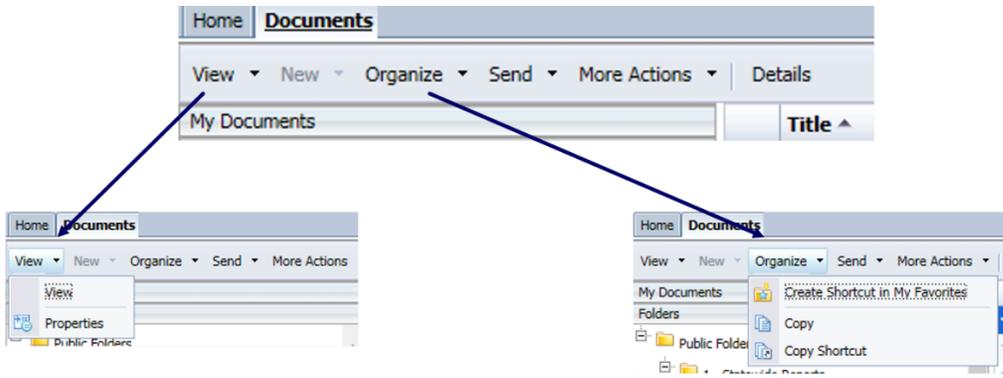
Other information that might be of interest



The **Side Panel** can be toggled on and off

The **Reports tab** can be toggled on and off

The **Status Bar** can be toggled on and off

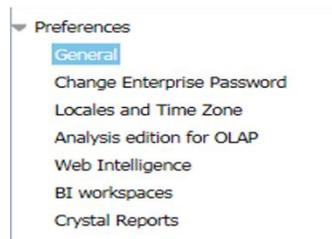


The View Control opens the selected report, the Properties Control provides some basic data

The Organize Control allows you to Create a Shortcut in My Favorites, Copy, or Copy Shortcut



The categories of Preferences are listed here. The one that pertains to end users are General



The General section allows users to modify the Use Default Settings. The item that we want to add to the Display Columns is Created On.

**General**

Use Default Settings (Administrator defined)

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**Set CGI infoAdvantage start page:**

Home tab

Default Home tab

Select Home tab:

Documents tab

My Documents

My Favorites

Personal Categories

My Inbox

Folders

Public Folders

Select Public Folder:

---

**Choose Columns to Display on Documents Tab:**

Type

Last Run

Instances

Description

Created By

Created On

Location (Categories)

Received On (Inbox)

From (Inbox)

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**Set document viewing location:**

In the CGI infoAdvantage portal as tabs

In multiple full screen browser windows, one window for each document

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Set the maximum number of items per page: