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- Celine Baker
- Michael Williams
- Jolene Teeters

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What can I expect from this course?

The infoAdvantage Interactive Reporting class is a two-hour course designed for users who require Interactive Report User access in infoAdvantage. This course focuses on the activities required to navigate, search, open, refresh/run, export, print and schedule reports in infoAdvantage.

infoAdvantage has two kinds of reports:

- Published reports that are automatically “burst” to the appropriate Department folders with data
- On Demand/Interactive reports that are run using prompt inputs for data.

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

**COURSE GOAL AND OBJECTIVES**

As a result of this class 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
- Run nightly, monthly, quarterly, or annually by GAO
- Automatically saved to Department’s Published Reports folder
- Most also available as On Demand Reports

On Demand/Interactive Reports
- 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:
<table>
<thead>
<tr>
<th>Description</th>
<th>Security Role (on UDOC)</th>
<th>View Published Reports</th>
<th>Run or Schedule On Demand/Interactive Reports</th>
<th>Create or Modify Reports</th>
<th>Run/view 1099AP Confidential Report</th>
<th>Modify 1099AP Confidential Report</th>
<th>Run/view HRIS Confidential Report</th>
<th>Create or Modify HRIS Confidential Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interactive User</td>
<td>INFO_INTRCT</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Report Developer</td>
<td>INFO_DVLPR</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes*</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>1099 User</td>
<td>INFO_1099AP</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Payroll User</td>
<td>INFO_PYRL</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

*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:

- Documents tab
  - My Documents
    - My Favorites
    - Personal Categories
  - Folders
    - Public Folders
    - Select Public Folder
      - Browse Folder
    - On Demand Reports

Choose Columns to Display on Documents Tab:
- Type
- Last Run
- Instances
- Description
- Created By
- Created On
- Location (Categories)
- Received On (Inbox)
- From (Inbox)

Set document viewing location:
- In the CGI infoAdvantage portal as tabs
- In multiple full screen browser windows, one window for each document

Set the maximum number of items per page: 50
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.

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

- 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)

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:
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:

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

**OPENING A REPORT**

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.

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:

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.
Group Exercise 3.1
The Department wants to see its Budget Activity by OSPB Master List

Which report will give us this information?

Group Exercise 3.2
Find FIN-AZ-BG-N146: Department Budget vs. Actuals by Divisions and Bureau

Individual Exercise 3.3
Find the FIN-AZ-GL-N212 Daily Cash Report in the 1-Statewide Folder.

Section Review
True or False?

<table>
<thead>
<tr>
<th>Statement</th>
<th>T</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>Most Published Reports have On Demand versions in Statewide folders</td>
<td>T</td>
<td>F</td>
</tr>
<tr>
<td>infoAdvantage folders are organized for effective searching</td>
<td>T</td>
<td>F</td>
</tr>
<tr>
<td>I can search for reports using a keyword search</td>
<td>T</td>
<td>F</td>
</tr>
<tr>
<td>Reports can be sorted and filtered within a folder</td>
<td>T</td>
<td>F</td>
</tr>
</tbody>
</table>
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.

![Advanced Prompt Menu Image]

Prompts that have an **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).

![Search Box Image]

*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 green 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.

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

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

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.

![Image of input controls with check boxes]

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

![Image of input controls with 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.

<table>
<thead>
<tr>
<th>Report ID: FIN-AZ-GL-N339</th>
</tr>
</thead>
<tbody>
<tr>
<td>Run Date: 05/10/2018</td>
</tr>
<tr>
<td>Run Time: 7:54 AM</td>
</tr>
</tbody>
</table>
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!**

<table>
<thead>
<tr>
<th>Filter Types</th>
<th>May Be Required Fields</th>
<th>Pre-Selected Fields</th>
<th>Limited to one filter value per object</th>
<th>Selected before report is Refreshed/Run</th>
<th>Can be added by Interactive user</th>
<th>Added by Developer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Prompt</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Input Controls</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Filter Bar</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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:

<table>
<thead>
<tr>
<th>Shortcut</th>
<th>Copy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Links to the source report.</td>
<td>DOEN NOT link to the source report.</td>
</tr>
<tr>
<td>If source report is a Statewide Report, any updates are immediately reflected.</td>
<td>If source report is a Statewide Report, updates are NOT reflected.</td>
</tr>
<tr>
<td>If source report name is changed, link will be broken.</td>
<td>Not affected by any changes to source report.</td>
</tr>
<tr>
<td>No customization available.</td>
<td>If Report Developer is owner, can customize.</td>
</tr>
</tbody>
</table>

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.
Group Exercise 4.1

Run FIN-AZ-AP-N121, which lists detailed Expenditures, Revenues, Encumbrances and Pre-Encumbrances by Department, for **Department: ANA, July 2016**.

Individual Exercise 4.2

Find and run the **FIN-AZ-BG-N149a: Appropriation Budget Status Excluding Pre-Encumbrances** report using the following criteria: **Department: ANA, July 2016**.

Group Exercise 4.3

Find and run the **FIN-AZ-AR-N338:** using the following criteria: **Department: ANA, July 2016**.

Group Exercise 4.4

We want to export two reports we have done so far.

Report FIN-AZ-BG-N149a: Appropriation Budget Status Excluding Pre-Encumbrances

- Which export command should we use? ____________________________
- Why? ____________________________

Report FIN-AZ-AP-N338: Monthly and Year End Cash Exp Comparison

- Which export command should we use? ____________________________
- Why? ____________________________

Individual Exercise 4.5

Export report FIN-AZ-AP-N121: Expenditures, Revenues, Encumbrances and Pre-Encumbrances by Department as a PDF to the user’s Desktop. Criteria: **Department: ANA, July 2016**.

I used (circle) Export Document Export Current Report

Because ____________________________
Group Exercise 4.6

Find a detailed listing of open Account Receivable documents for department STA. Revenue Source should be in the report.

1. Find the report.
   • What is the report number?

2. Run the report using the following prompts:

   Department: STA
   Fiscal Year: 2017
   Accounting Period: 1

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

Group Exercise 4.7

Find which revenues have been received during July in Fiscal Year 2017 for ANA. Show all revenues, but be able to filter for particular sources.

1. Save the FIN-AZ-GL-N333 report to the On Demand Reports folder and schedule the report using the information provided above.

2. After it runs, filter for:

   Revenue Source Class 4300

3. Reset filter to All values

4. Turn off the Filter Bar

5. Change the font on the Header Bar and export the report to Excel
Section Review

True or False?

<table>
<thead>
<tr>
<th>Prompt</th>
<th>T</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prompts are not case sensitive in infoAdvantage?</td>
<td>T</td>
<td>F</td>
</tr>
<tr>
<td>All prompts must be entered before a report is refreshed/run.</td>
<td>T</td>
<td>F</td>
</tr>
<tr>
<td>All Interactive Reports must be refreshed to see data.</td>
<td>T</td>
<td>F</td>
</tr>
<tr>
<td>If a report has multiple tabs, I have to export them one by one.</td>
<td>T</td>
<td>F</td>
</tr>
<tr>
<td>infoAdvantage limits printing to 20 pages.</td>
<td>T</td>
<td>F</td>
</tr>
</tbody>
</table>

Why save reports?
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. 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

3. 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.

4. Formats – It is recommended to leave the report in the Web Intelligence format
5. Caching – This is not available to interactive users.
6. Events – This has not been configured for interactive users. Please do not use this option.
7. Scheduling Server Group – This is not available to interactive users.
8. 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)**

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 can be reopened by right clicking on the report and then select “History”. 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.
TIP:
*It is recommended that reports are exported and saved outside of infoAdvantage and scheduled instances be deleted from History.*

Deleting instances

![Image of deleting instances](image)

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.

<table>
<thead>
<tr>
<th>Possible Causes</th>
<th>Possible Solutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>▪ Mismatch in the data entered</td>
<td>▪ A different report might be better</td>
</tr>
<tr>
<td>▪ Data hasn’t posted yet</td>
<td>▪ Check with co-workers to ensure the data is correct</td>
</tr>
</tbody>
</table>
**Way too much data was returned.**

<table>
<thead>
<tr>
<th>Possible Causes</th>
<th>Possible Solutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Criteria is too broad</td>
<td>• Enter more criteria in the prompts to narrow the data</td>
</tr>
<tr>
<td></td>
<td>• Make sure to use the query filters</td>
</tr>
</tbody>
</table>

**No data was returned.**

<table>
<thead>
<tr>
<th>Possible Causes</th>
<th>Possible Solutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mismatch in the data entered</td>
<td>• 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.</td>
</tr>
<tr>
<td>caps not used when should be CAPS</td>
<td>• Another key element is to communicate. If you’re the report specialist, but don’t have AFIS knowledge, talk with your finance people.</td>
</tr>
<tr>
<td>The report needs to be refreshed</td>
<td>• You won’t get the data you need if you don’t know what to ask for.</td>
</tr>
<tr>
<td>Data hasn’t posted yet</td>
<td></td>
</tr>
<tr>
<td>Data is pre-2016</td>
<td></td>
</tr>
<tr>
<td>There is really no data</td>
<td></td>
</tr>
</tbody>
</table>
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 Review

Why schedule reports?

This is an easy way to have reports run in the background, instead of waiting for a report to run. This is also useful if the report is a larger report and it may take up to 30 minutes to run.

What should the Department do before requesting a custom report?

Communicate with other AFIS and infoAdvantage users within your Agency. Other users may know whether or not there is a report that does what you want or may know what other reports may be in the works.
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.
## Reference Review

The answers to the questions in the section reviews

<table>
<thead>
<tr>
<th>Most Published Reports have On Demand/Interactive versions in Statewide folders</th>
<th>T</th>
</tr>
</thead>
<tbody>
<tr>
<td>infoAdvantage folders are organized for effective searching</td>
<td>T</td>
</tr>
<tr>
<td>I can search for reports using a keyword search</td>
<td>T</td>
</tr>
<tr>
<td>Reports can be sorted and filtered within a folder</td>
<td>T</td>
</tr>
</tbody>
</table>

**Prompts are not case sensitive in infoAdvantage.**
- Prompts in infoAdvantage are case sensitive. “aba” is not the same as “ABA”. Make sure to use the correct case to ensure reports pull the correct data. | F |

**All Prompts must be entered before a report is refreshed/run.**
- Required prompts must be entered before a report is refreshed/run, however, optional prompts do not need to be entered in order to run/refresh a report. | F |

**All Interactive Reports must be refreshed to see data.** | T |

**If a report has multiple tabs, I have to export them one by one.**
- Reports with multiple tabs may be exported one by one using the “Export Current Report As...”. Full reports can also be exported using the “Export Document As...”. This will include all of the tabs. | F |

**infoAdvantage limits printing to 20 pages.**
- Reports must first be exported from infoAdvantage before they can be printed. Once the report is exported, the only limit will be based on the system setup for the user. | F |
Appendix: Toolbar/Menu chart

**STANDARD TOOLBAR**

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

**ON DEMAND REPORT CONTEXT MENU**

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

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