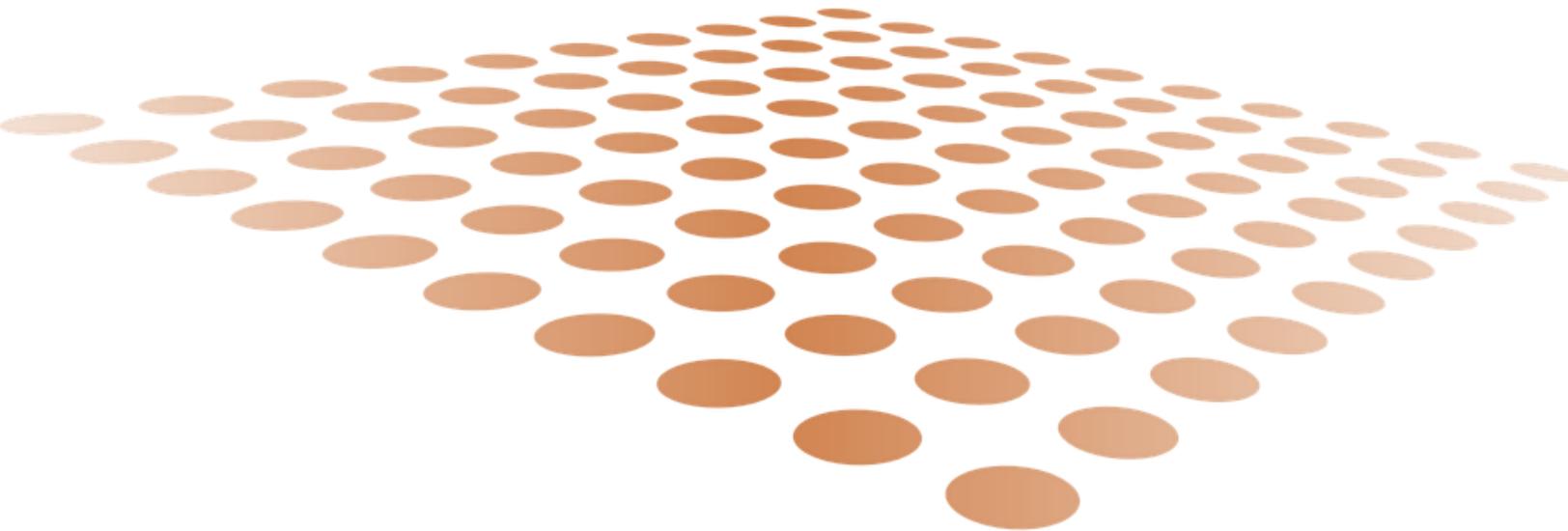**AFIS**
ARIZONA FINANCIAL INFORMATION SYSTEM

ADOA – General Accounting Office

QUICK REFERENCE GUIDE: RUN AN INTERACTIVE INFOADVANTAGE REPORT

RUN AN INTERACTVIE INFOADVANTAGE REPORT

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RUN AN INTERACTIVE INFOADVANTAGE REPORT

Overview

InfoAdvantage contains two kinds of reports in the folder structure:

- Published reports within Agency folders, run on a scheduled basis and distributed in PDF format for each Agency, viewable by all users; and

- On-Demand reports within the Statewide folders available to run as needed; viewable by users with the InfoAdvantage "Interactive" role.

This Quick Reference Guide shows you how to access and run the On-Demand reports.

Procedure for Running Reports

Log into **AFIS**. Navigate to the **InfoAdvantage Reports**.

1. In the **Jump to** field, enter **INFOADV**

   - A new window will open for InfoAdvantage, starting with the Home tab displayed.

2. Click on the **Documents** tab (upper left corner of screen)

3. Click on the **Folders** section

   - A view of Report Folders is displayed.

4. Select the folder *1 – Statewide Reports*.

   - Other subfolders for Functional Areas are displayed under the Statewide Reports folder.

   - **Open** a report
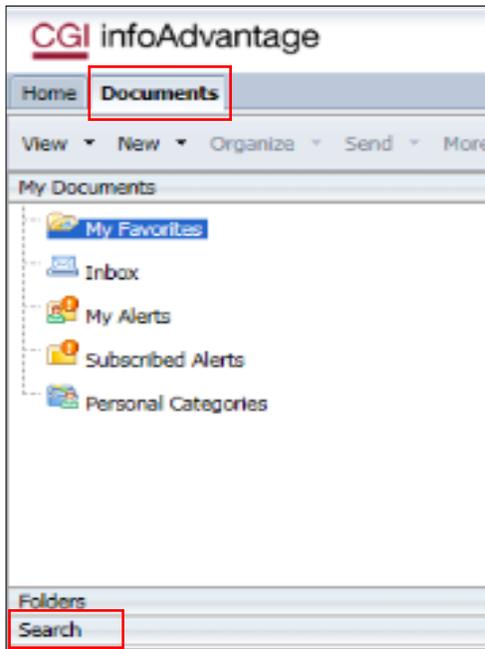
Note: Some reports serve more than one Functional Area. Browse multiple folders to find the best report, or search the AFIS Report Inventory at the GAO website.

5. **Double-click** the report to open it

   ▪ The report opens in a new tab within InfoAdvantage.

6. **Run** the report

When an on-demand report is first opened, it will either be empty or it will have some data from its last saved run. You must always *refresh* the report to get current data.

1. Click the **Refresh** icon on the toolbar

   ▪ If the report has user-entered prompts, the Prompts dialog opens.

   ▪ If the report has no prompts, it will generate data based on today's date. (Skip the "Enter values" step).

2. Enter values for all Required and any Optional prompts you choose

   ▪ Required prompts are marked with an asterisk and start with a red arrow to show a value is still required before the report can run. When a value is entered, the red arrow changes to a green check.

   ▪ Optional prompts always show a green check to
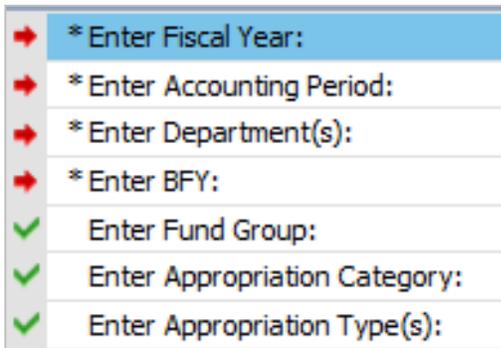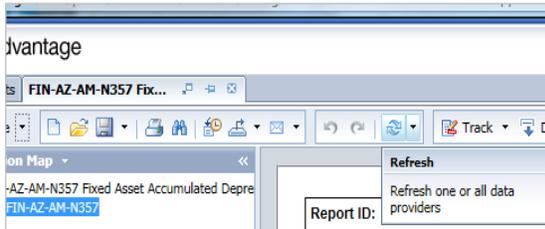
show that sufficient values are set.

Select prompts from the list of available values in the middle. Click **Enter** or the **right arrow** to move selected values to the prompt list on the right.

Note: You can use the Search box to filter the list of available values with a search string. The search returns values that contain the string; no "wild card" (*) is needed.
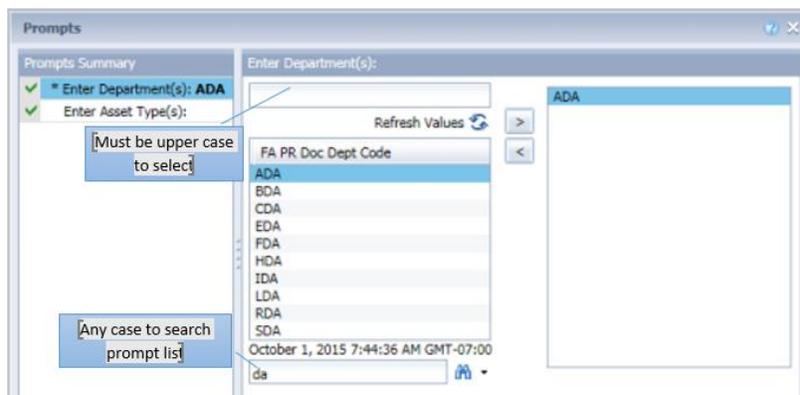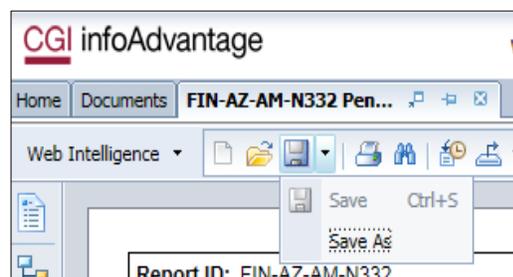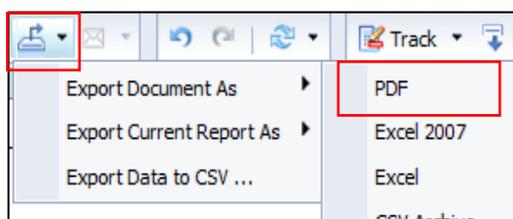

Click **OK** to run the report.

View the report.

- Some reports have multiple tabs of data; select them at the bottom of the report.

- Some reports have subtotals and totals by Chart of Accounts or other categories.

- Reports show data that has been exported to the data warehouse as of the previous night's processing.

Save/Export the report.

- Use the **Export Document as PDF** option to create a soft-copy of the report for distribution.

- If the report has been formatted as an extract (i.e., no cover page and no groupings/subtotals), you can also use the **Export Document As Excel 2007**.

- (Optional) You can use **Save As …** to copy the report to your Agency folder so that you can run it from there in the future, rather than

having to find it each time in the *1 – Statewide Reports* folders for the on-demand reports.

Helpful Hints

User Prompt Input Window

If you are going to run the report more than once with different prompts, use the User Prompt Input from the sidebar instead of the Prompts dialog to enter your prompts. Multiple values for an item must be separated by a semicolon (e.g., two values ABC and DEF are entered as *ABC; DEF*).

Prompt Entry is Case-Sensitive

While AFIS is very good at letting you enter search terms in lower-case for any value, InfoAdvantage is *strictly case-sensitive* for prompt entry. If you are typing a prompt for Department or Fund, you must use all upper-case (*DTA*, not *dta*) in order to match any real values in the stored data.

Display Modes and Zoom

There are two *display modes*, selected by icons on the status bar next to the magnification.

- Page mode maintains the formatting of page width and height. Use the Pager (arrows with *Page X of Y*) to click through the report, or type a page number to jump directly to a page.

- Quick Display mode is better for extract reports that do not have pagers or width limitations.
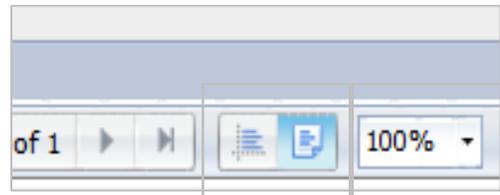
InfoAdvantage has a *zoom* button at the lower right that lets you display at other than 100% width if you choose, such as Page Width or Whole Page.

Browser Session Timeout

InfoAdvantage will time out following ASET policy, just as AFIS will. You can log in again from AFIS using the Jump to dialog, but you may need to refresh the AFIS screen in order to make the Jump to work again.

InfoAdvantage Data Begins with FY2016

InfoAdvantage reports only read data beginning with State Fiscal Year 2016. Prior fiscal year data may be retrieved from Legacy AFIS Control-D reports or by accessing OpenBooks.

Saving Reports in the Agency Folder

Agencies that only use a few of the reports may find it helpful to copy the report to their own agency folder to make it easier to find the small set of reports that you use regularly. You will still need to re-enter your prompts each time you run the report.

If you do save copies of the reports in your agency folder, watch for any web stories that are published to say that a Statewide Report has been updated. You will need to re-copy the updated report from the *1 – Statewide Reports* folder structure into your agency folder or anywhere in the subfolders underneath your agency folder.