

# **Advantage 3.11- infoAdvantage – Basic Introduction: Report Generation**

## **Class Title:**

Basic Introduction to infoAdvantage 3.11

# Goal & Objectives

**Goal:** After taking this class, students will know how to navigate within infoAdvantage 3.11 in order to generate reports.

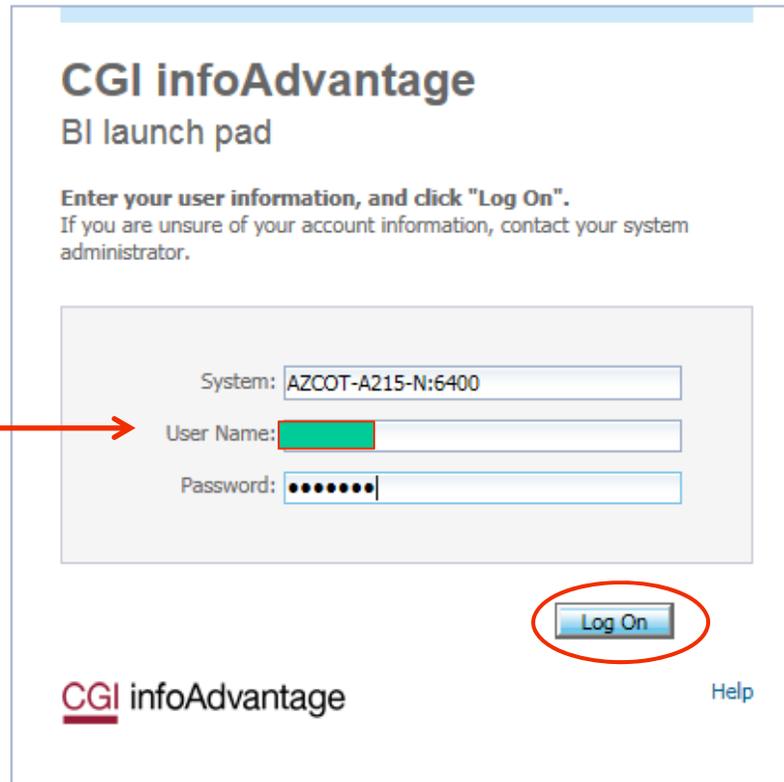
**Objectives:**

- How to log into infoAdvantage 3.11
- How to navigate in infoAdvantage 3.11
- How to run a report in infoAdvantage 3.11
- How to print and save a report in infoAdvantage 3.11
- How to export a report in infoAdvantage 3.11
- How to close a report in infoAdvantage 3.11
- How to sign out of infoAdvantage 3.11

## How to Log into infoAdvantage 3.11

1. Enter the web address for infoAdvantage in your internet browser.

2. Enter your 6 digit employee number as your **User Name**, enter your **Password**, then click the **Log On** button.



**CGI infoAdvantage**  
BI launch pad

Enter your user information, and click "Log On".  
If you are unsure of your account information, contact your system administrator.

System: AZCOT-A215-N:6400

User Name:

Password:

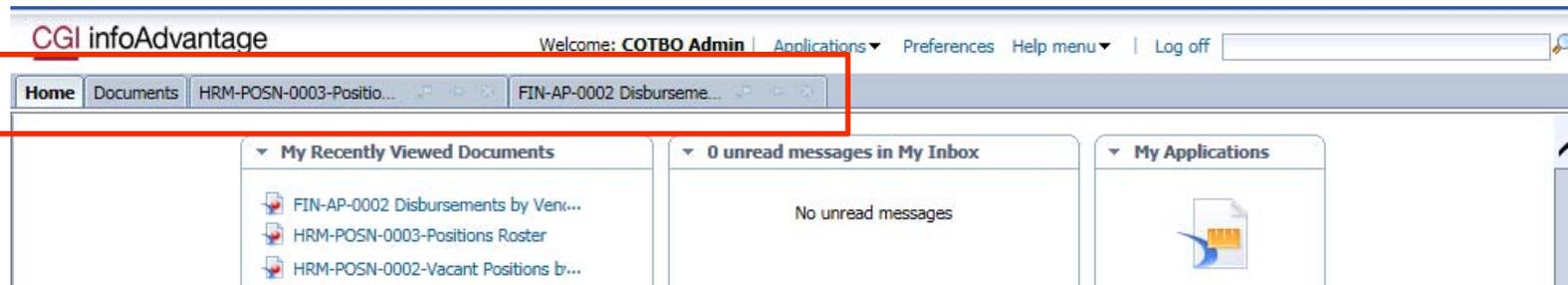
[Log On](#)

**CGI** infoAdvantage [Help](#)

## How to Navigate in infoAdvantage 3.11

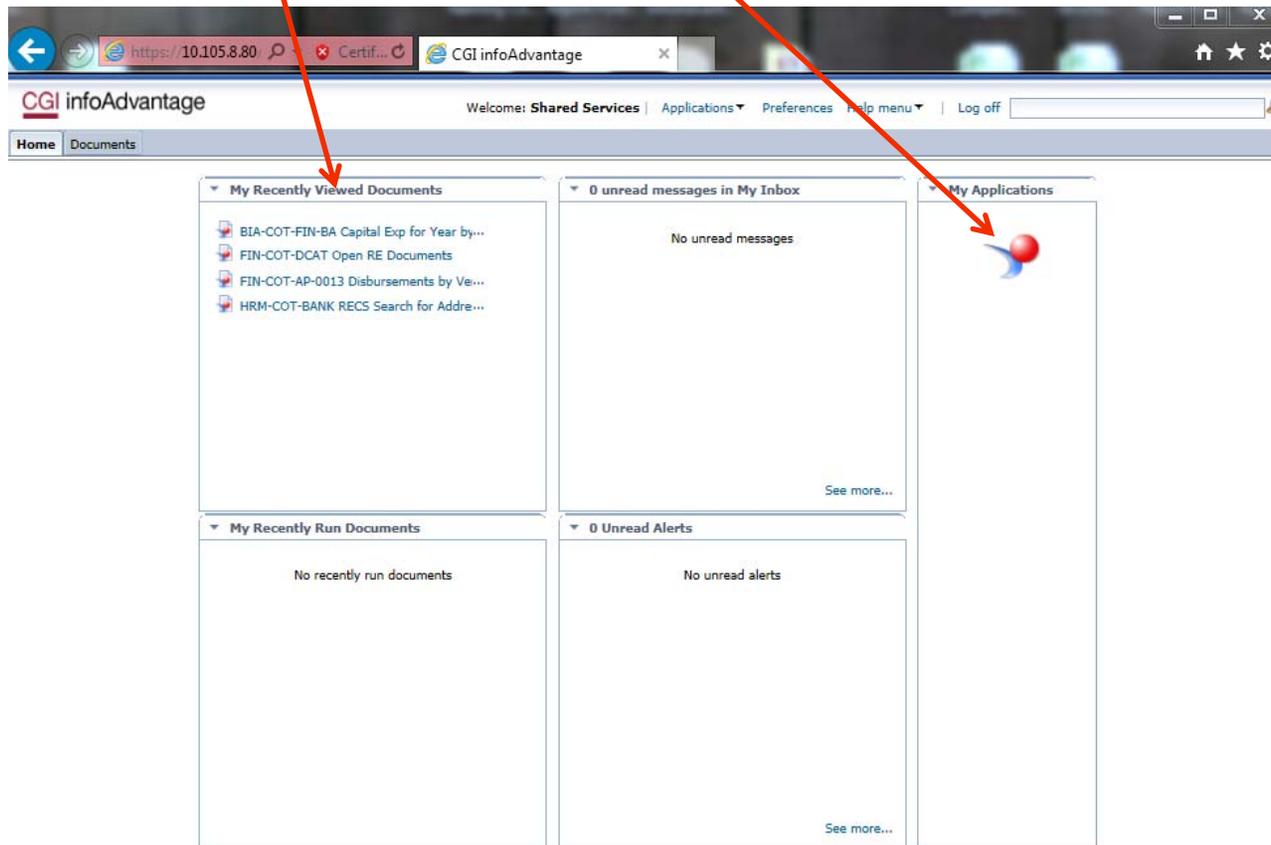
### Tabs

- At the top of the page are different tabs for **Home** and **Documents**, and one for each report you have open.
- You can have multiple reports open at one time.
- You can pin frequently used reports to a tab, by clicking on the  on the report tab, which works as a toggle to pin and unpin reports.



## How to Navigate in infoAdvantage 3.11

The **Home** Tab: This is the infoAdvantage home page. You can access your ten (10) most recently viewed documents. The **Web Intelligence** pane is for report developer access only.

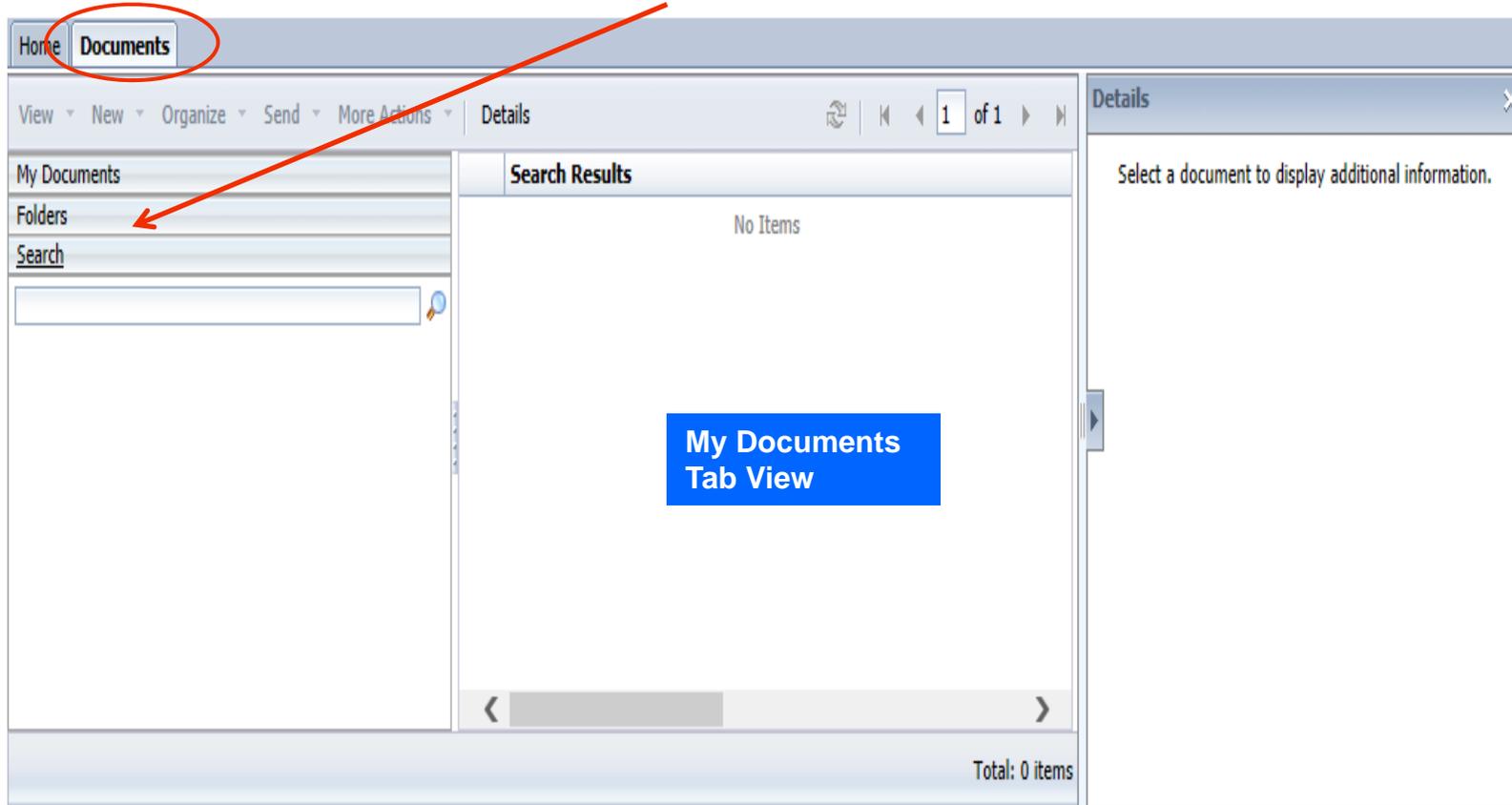


The screenshot displays the CGI infoAdvantage 3.11 home page. The browser address bar shows the URL <https://10.105.8.80> and the page title "CGI infoAdvantage". The page header includes "Welcome: Shared Services | Applications | Preferences | Help menu | Log off". The main content area is divided into several panels:

- My Recently Viewed Documents**: Lists four documents:
  - BIA-COT-FIN-BA Capital Exp for Year by...
  - FIN-COT-DCAT Open RE Documents
  - FIN-COT-AP-0013 Disbursements by Ve...
  - HRM-COT-BANK RECS Search for Addre...
- 0 unread messages in My Inbox**: Shows "No unread messages" and a "See more..." link.
- My Applications**: Shows a globe icon and a "See more..." link.
- My Recently Run Documents**: Shows "No recently run documents".
- 0 Unread Alerts**: Shows "No unread alerts" and a "See more..." link.

## How to Navigate in infoAdvantage 3.11

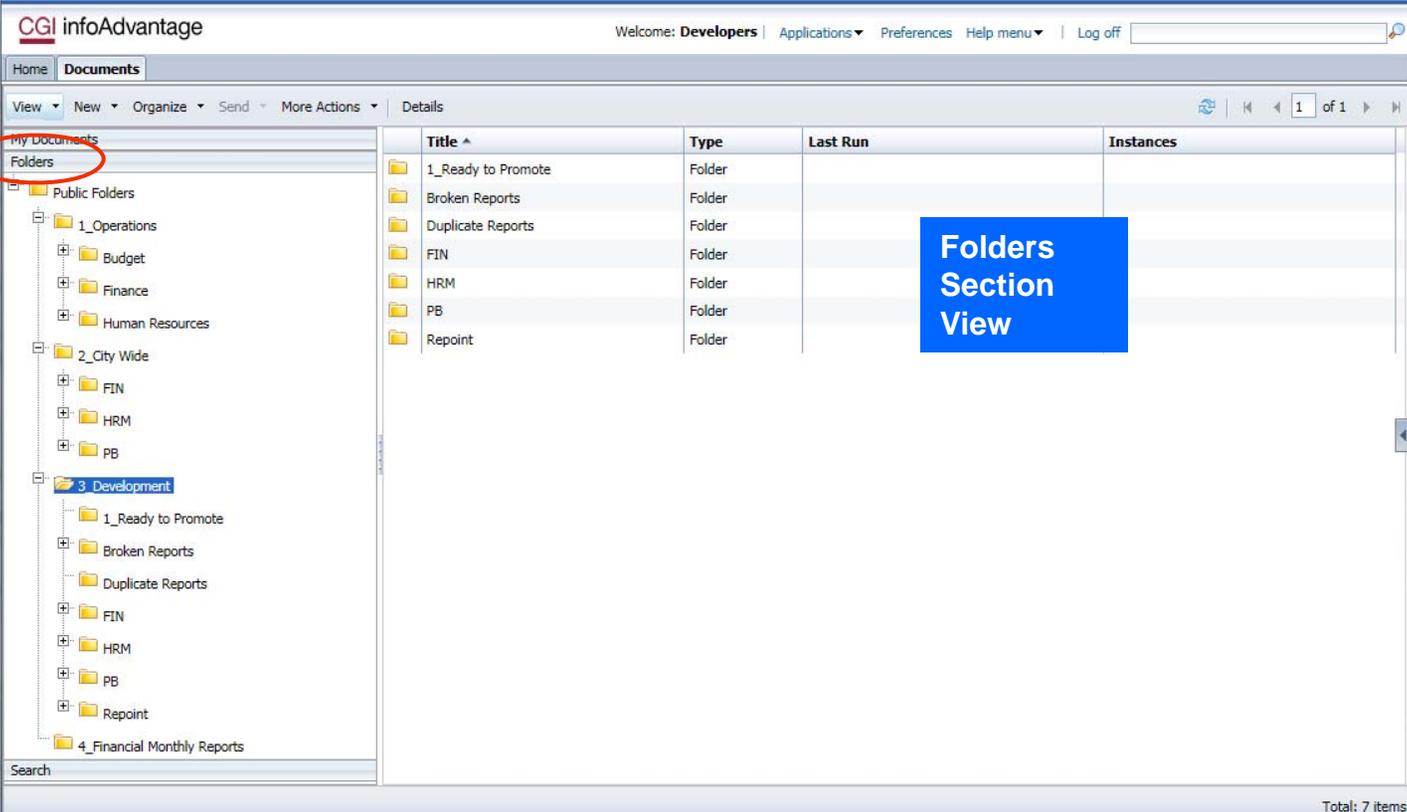
The **Documents** Tab: The **My Documents**, **Folders**, and **Search** are located here. Click on the **Documents** Tab and then a **Folders** Section in the left-hand pane to access your reports.



The screenshot displays the infoAdvantage 3.11 interface. At the top, there are two tabs: 'Home' and 'Documents', with 'Documents' circled in red. Below the tabs is a menu bar with options: 'View', 'New', 'Organize', 'Send', 'More Actions', and 'Details'. The main content area is divided into three sections: 'My Documents', 'Folders', and 'Search'. The 'Folders' section is highlighted with a red arrow. The 'Search Results' section shows 'No Items' and a blue button labeled 'My Documents Tab View'. The 'Details' pane on the right contains the text 'Select a document to display additional information.' At the bottom right, it says 'Total: 0 items'.

## How to Navigate in infoAdvantage 3.11

The **Folders** Section: The **Public Folders: Operations, City Wide, Development, and Financial Monthly Reports** are located here. Your security level will determine which of these folders you will see.



CGI infoAdvantage

Welcome: **Developers** | Applications | Preferences | Help menu | Log off

Home Documents

View | New | Organize | Send | More Actions | Details

1 of 1

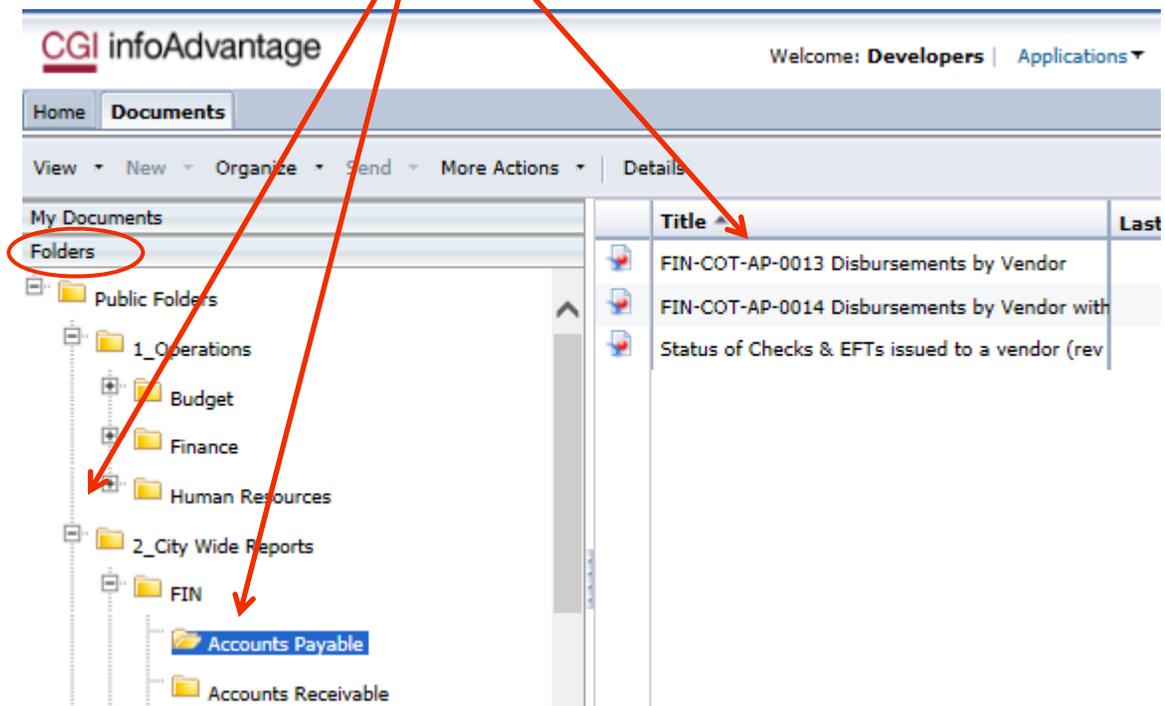
Title ^	Type	Last Run	Instances
1_Ready to Promote	Folder		
Broken Reports	Folder		
Duplicate Reports	Folder		
FIN	Folder		
HRM	Folder		
PB	Folder		
Repoint	Folder		

**Folders Section View**

Total: 7 items

## How to Run a Report in infoAdvantage 3.11

Expand the **Folders** section and drill down into the folders by clicking on the folder names to show reports available to be run. Navigate to the report you would like to run by Double clicking the report to open it.

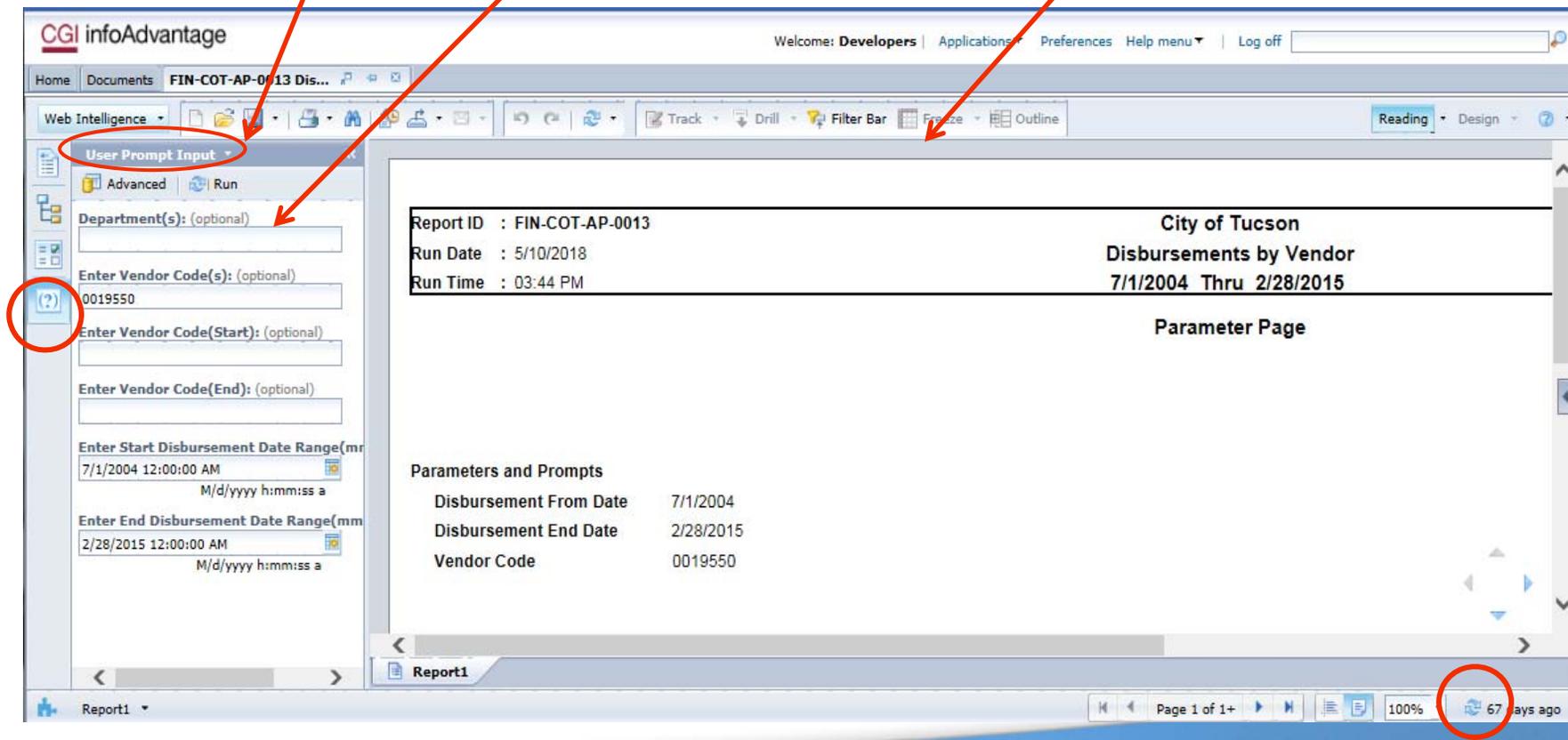


The screenshot shows the CGI infoAdvantage 3.11 interface. The 'Folders' section is expanded, showing a tree view of folders: Public Folders, 1\_Operations, Budget, Finance, Human Resources, 2\_City Wide Reports, and FIN. The 'Accounts Payable' folder under 'FIN' is selected. The right pane displays a list of reports with columns 'Title' and 'Last'.

Title	Last
FIN-COT-AP-0013 Disbursements by Vendor	
FIN-COT-AP-0014 Disbursements by Vendor with	
Status of Checks & EFTs issued to a vendor (rev	

## How to Run a Report in infoAdvantage 3.11

Once the report opens, if the report was designed to be modified using prompts (Look for (?) in the vertical panel on the far left of the screen), enter the appropriate parameters into the **User Prompt Input** section, then click the **Run** button. Once the report has refreshed or completed running, you can view the report in the pane to the right of the prompts.



The screenshot shows the infoAdvantage 3.11 interface. On the left, the 'User Prompt Input' section is visible, containing several input fields for parameters such as 'Department(s)', 'Enter Vendor Code(s)', and 'Enter Start Disbursement Date Range'. A red circle highlights a question mark icon in the left sidebar. The main report area displays the following information:

Report ID : FIN-COT-AP-0013	City of Tucson
Run Date : 5/10/2018	Disbursements by Vendor
Run Time : 03:44 PM	7/1/2004 Thru 2/28/2015

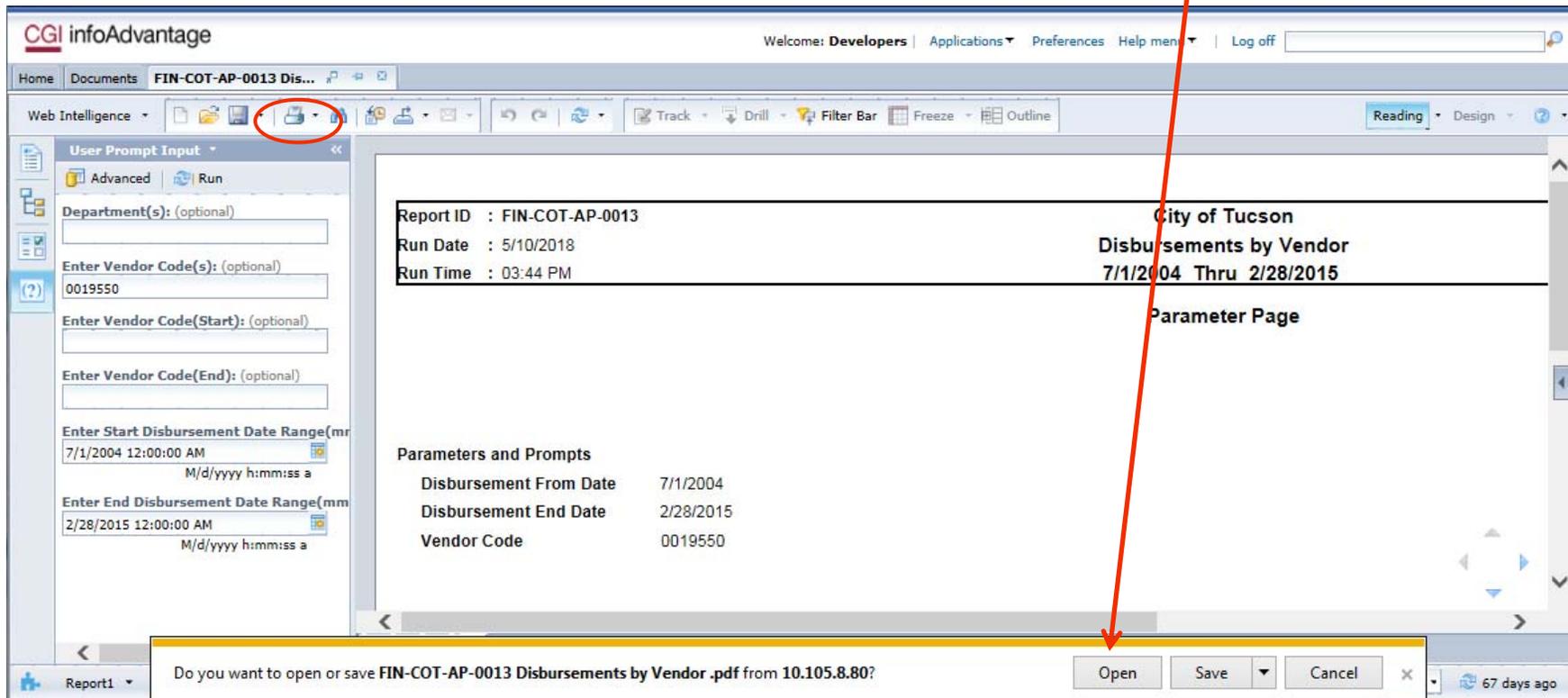
Below this, the 'Parameter Page' is shown with the following details:

Parameters and Prompts	
Disbursement From Date	7/1/2004
Disbursement End Date	2/28/2015
Vendor Code	0019550

At the bottom right of the interface, a red circle highlights the '67 days ago' refresh indicator.

## How to Print a Report in infoAdvantage 3.11

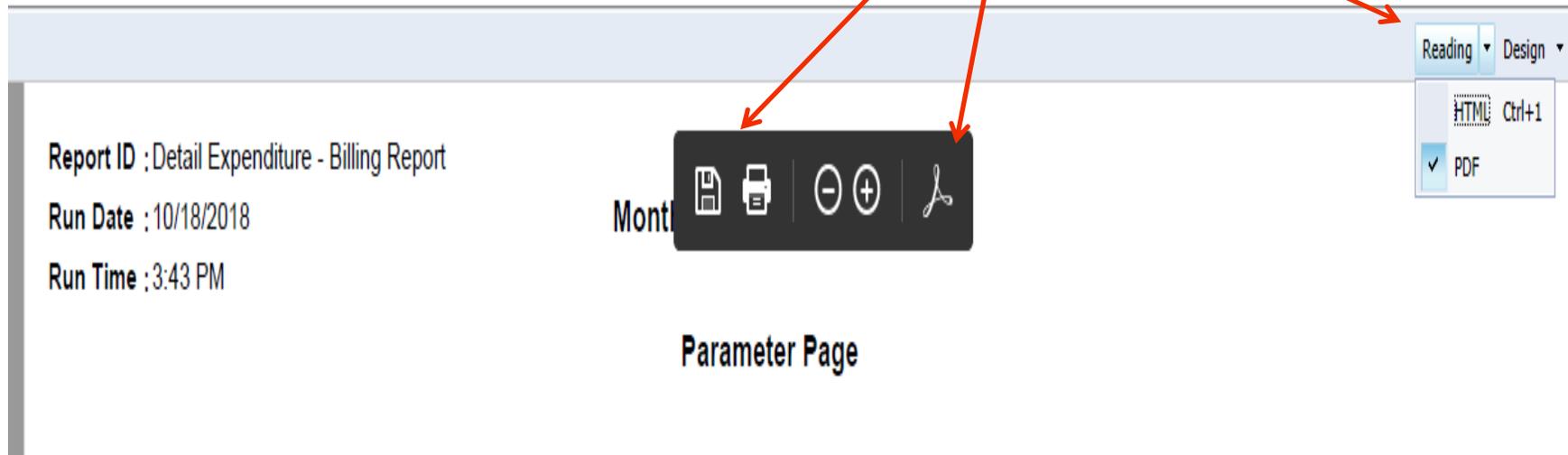
Two ways you can print a report, 1) by clicking on the **Printer icon** on the tool bar. Click **Open** to open the report as a PDF, which you can then print directly from a printer.



The screenshot displays the CGI infoAdvantage 3.11 web application interface. The top navigation bar includes 'Home', 'Documents', and the current report title 'FIN-COT-AP-0013 Dis...'. The main content area shows report details: Report ID: FIN-COT-AP-0013, Run Date: 5/10/2018, Run Time: 03:44 PM, and the report title 'City of Tucson Disbursements by Vendor 7/1/2004 Thru 2/28/2015'. A 'Parameters and Prompts' section lists: Disbursement From Date: 7/1/2004, Disbursement End Date: 2/28/2015, and Vendor Code: 0019550. A dialog box at the bottom asks, 'Do you want to open or save FIN-COT-AP-0013 Disbursements by Vendor .pdf from 10.105.8.80?'. The dialog has 'Open', 'Save', and 'Cancel' buttons. A red arrow points from the text above to the 'Open' button in the dialog.

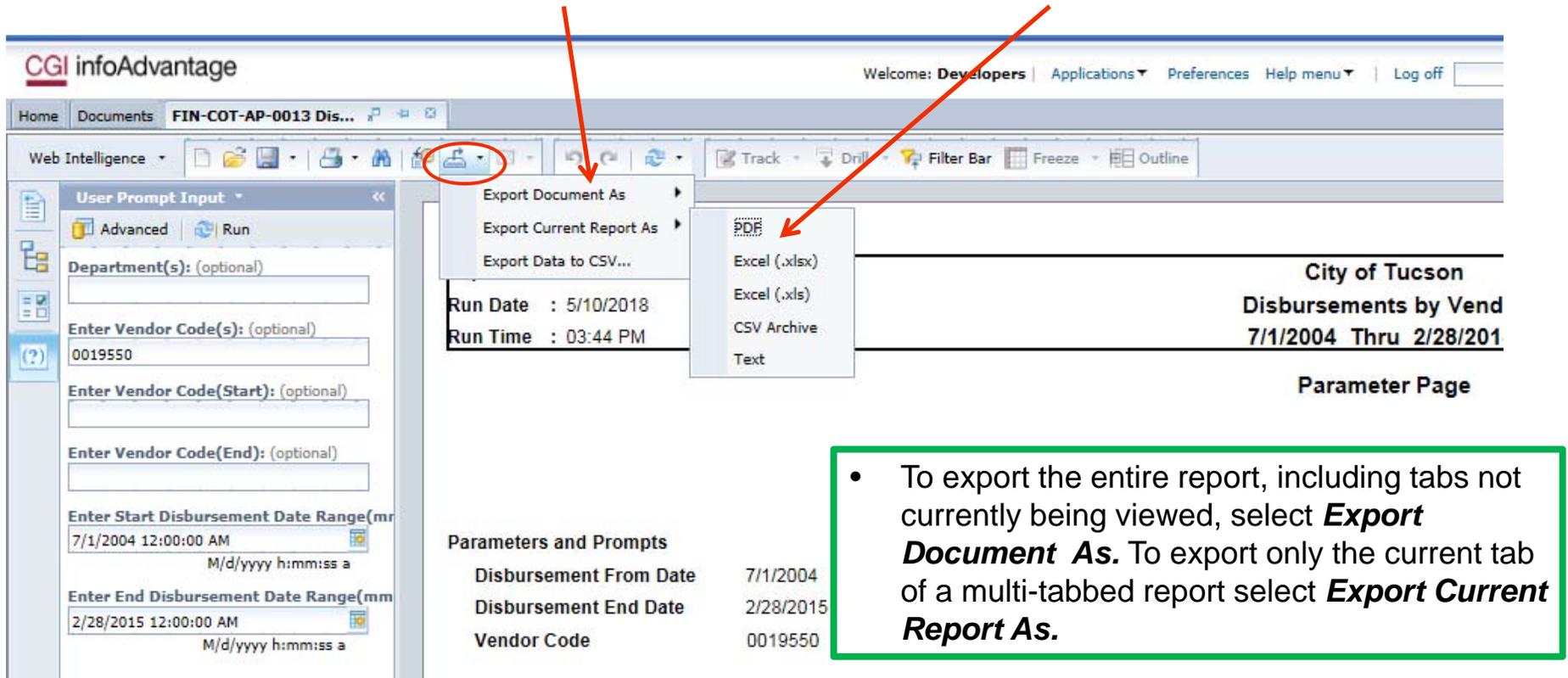
## How to Print a Report in infoAdvantage 3.11

2) You can save or print a report by clicking on the **Reading drop-down** in the right-hand corner of the tool bar. Click the arrow to show options, "HTML" or "PDF." Click on "PDF," **Open** to open the report as a PDF. You can then choose to save, or print to file or on a printer.



## How to Export a Report in infoAdvantage 3.11

You can export a report as a PDF, Excel, CSV, or Text file, by clicking on the **Export icon** on the tool bar, selecting **Export Document As**, and then selecting the appropriate format.



The screenshot shows the CGI infoAdvantage web application interface. The top navigation bar includes "Welcome: Developers", "Applications", "Preferences", "Help menu", and "Log off". The main toolbar contains various icons, with the "Export" icon (a printer with a document) circled in red. A red arrow points from this icon to the "Export Document As" option in the dropdown menu. Another red arrow points from the "Export Document As" option to the "PDF" option in the sub-menu. The main content area displays a report titled "City of Tucson Disbursements by Vend 7/1/2004 Thru 2/28/201" with a "Parameter Page" below it. The "Parameters and Prompts" section shows the following data:

Run Date	: 5/10/2018
Run Time	: 03:44 PM
Disbursement From Date	7/1/2004
Disbursement End Date	2/28/2015
Vendor Code	0019550

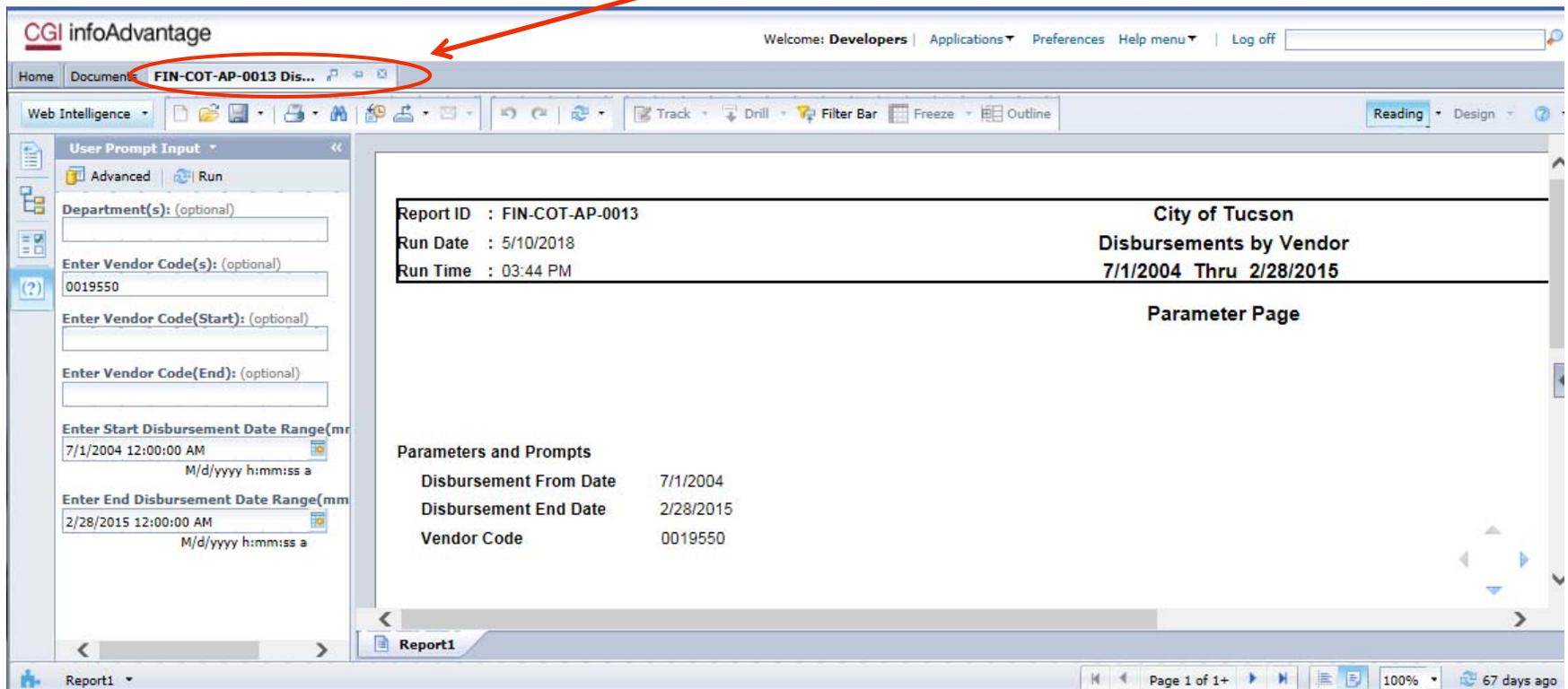
The "Export" menu options are:

- Export Document As
  - PDF
  - Excel (.xlsx)
  - Excel (.xls)
  - CSV Archive
  - Text
- Export Current Report As
- Export Data to CSV...

- To export the entire report, including tabs not currently being viewed, select **Export Document As**. To export only the current tab of a multi-tabbed report select **Export Current Report As**.

## How to Close a Report in infoAdvantage 3.11

You can close the report by clicking on the **X** on the report name tab.



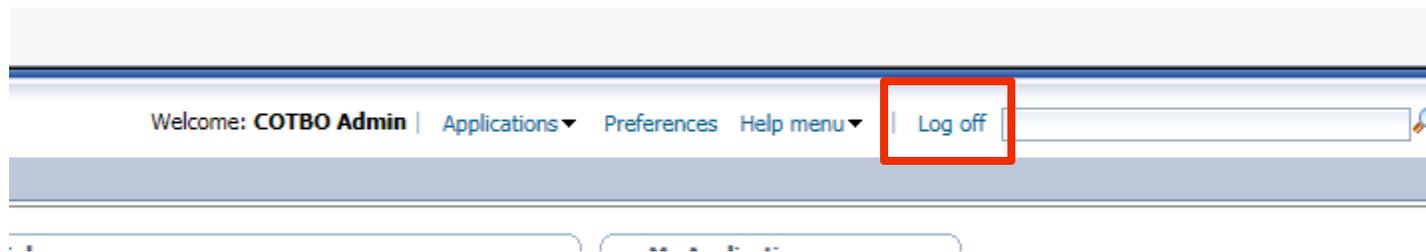
The screenshot shows the infoAdvantage 3.11 web application interface. The browser tab is titled "FIN-COT-AP-0013 Dis...". A red circle highlights the close button (X) on the browser tab, and a red arrow points to it from the text above. The main content area displays a report titled "City of Tucson Disbursements by Vendor 7/1/2004 Thru 2/28/2015". The report includes a "Parameter Page" section with the following data:

Parameters and Prompts	
Disbursement From Date	7/1/2004
Disbursement End Date	2/28/2015
Vendor Code	0019550

The interface also shows a "User Prompt Input" section on the left with various input fields for department, vendor code, and date ranges.

## How to Sign Out of infoAdvantage 3.11

To sign out of infoAdvantage, click **Log off**, located in the upper right-hand area of the screen.



Thank You!

This concludes the  
Basic Introduction to infoAdvantage 3.11