



ADOA – General Accounting Office
**AZ360 MANUAL:
INTERACTIVE REPORTING**



Interactive Reporting

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All activity demonstrations will be displayed with an icon. Demonstrations will detail which elements to input, but agency data should always be used when processing in AZ360 and infoAdvantage.

Interactive Reporting

The infoAdvantage Interactive Reporting manual is designed for users who have Interactive User (INFO_INTRCT) report access in infoAdvantage. This manual focuses on the activities required to run interactive (on-demand) reports using infoAdvantage.

Manual Objectives

- Select the best report to meet the business need by using the infoAdvantage Report Dictionary.
- Consistently run reports that retrieve essential data.
- Export reports to PDF or Excel.
- Review the steps required to request a custom report.

Introduction to Interactive Reporting

Section Objectives

In this section, the following processes are introduced:

- An Overview and Introduction to Interactive Reporting.
- Review the infoAdvantage Report Structure and Components.

Section Overview

infoAdvantage is a secured web-based SAP Business Objects system. Using infoAdvantage allows easy access to run financial related reports. The financial information found in infoAdvantage comes from AZ360, the statewide financial management system, through an overnight ETL process. All infoAdvantage reports are based on the data that has been entered in AZ360. InfoAdvantage is scheduled to be available from 6:00am to 8:00pm, every workday, after the ETL is complete.

infoAdvantage has two kinds of reports:

- Pre-generated reports – Automatically added to the appropriate folders in Excel or PDF format. The pre-generated reports are pre-defined and the user does not enter prompts.
- Interactive reports – Allow users to enter prompts.

This manual focuses on interactive reports, and how to get the most out of them. As a result of completing this manual, users will be able to run interactive reports in infoAdvantage to retrieve financial data that supports their agency's business needs.

Security Roles in infoAdvantage

Access to infoAdvantage is controlled by the General Accounting Office (GAO). The activities detailed in this manual pertain to the INFO_INTRCT security role in AZ360. The available security roles related to infoAdvantage are listed in the table below. For more information on security roles, see the quick

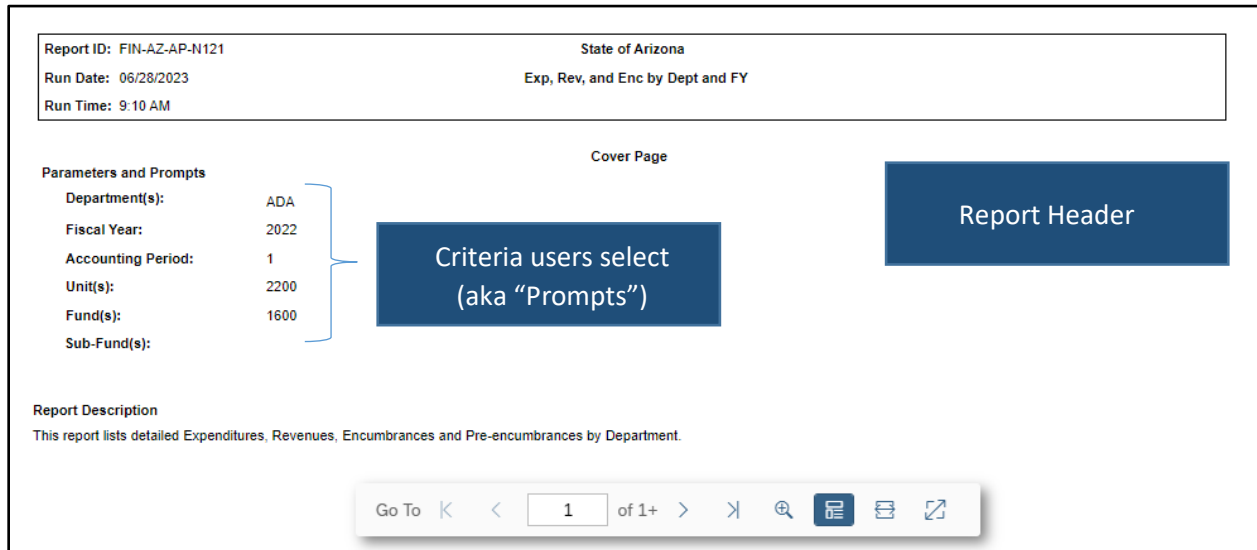
reference guide (QRG) **Create and Update a User With UDOC** available at <https://gao.az.gov/resources/training/gao-training-resources>.

Table 2: infoAdvantage Security Roles

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

Report Components

The majority of Statewide reports begin with a cover page. Prompts reflect the fields that a user can enter criteria for AND the specific criteria the user entered.



Subsequent pages show the data, which may be organized in the following ways:

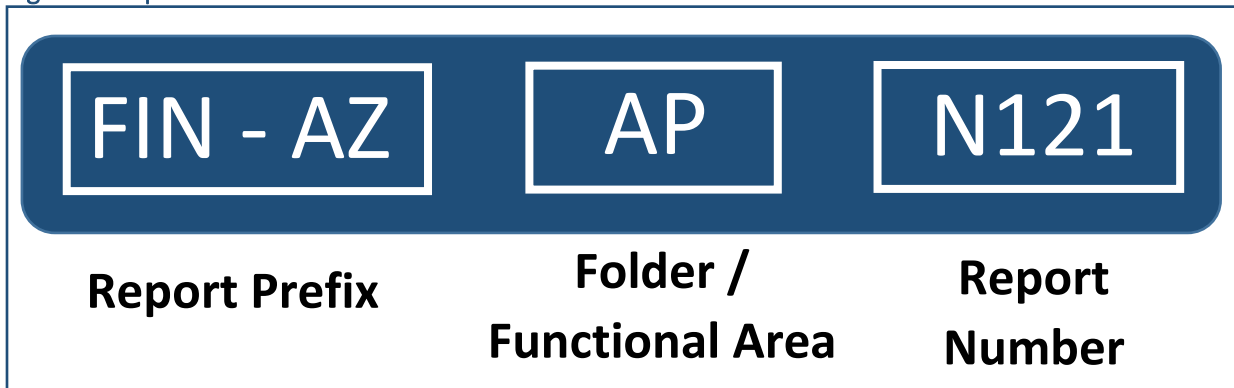
- Sections – Reflect data that is grouped together. For example, a report that has FUND in the section, would group and summarize all the records for Fund 1600 together, then Fund 1700 together, etc.
- Columns – Reflect that data from AZ360 for the selected fields.

State of Arizona Exp, Rev, and Enc by Dept and FY								
Report ID: FIN-AZ-AP-N121								
Run Date: 06/28/2023								
Run Time: 9:10 AM								
Department: ADA - DEPT OF ADMINISTRATION			} Sections	} Columns				
Budget Fiscal Year: 2020								
Unit: 2200 - BUILDING AND PLANNING SERVICES								
Fund: 1600 - CAPITAL OUTLAY STABILIZATION								
Sub-Fund: -								
Object	Revenue Source	Document ID	Vendor Name	Event Type	Function	Cash Revenue / Expenditure	Accrued Revenue / Expenditure	Pre-Encumbrance / Encumbrance
6231		GAEIV1,ADA,PO0000323059	GLHN ARCHITECTS & ENGINEERS INC	PR05	BR200051 7C	0.00	0.00	-2,814.24
6231		GAEIV1,ADA,PO0000337269	SPECTRUM ENGINEERS INC	PR05	BR200051 1C	0.00	0.00	5,770.00
6231		JVES,BAT,SWES22001066				0.00	0.00	664.89

Report names are made up of several sections:

- FIN - AZ – Report prefix.
- Folder/Functional Area – An organizational component that, like reports, is housed within infoAdvantage.
- Report Number – A name attributed to the report based on topic and report numerical order within the folder or functional area.

Figure 2: Report Names and Numbers



Note: Data in infoAdvantage is one day behind for most reports. Users can tell how current their report data is by the report prefix. For example, reports with the “FIN” prefix contain data this is one day behind while reports with the “OFIN” prefix contain data that is live or current.

infoAdvantage Reports Dictionary

Section Objectives

In this section, the following process is introduced:

- Review and utilize the infoAdvantage Reports Dictionary.

Section Overview

The infoAdvantage Reports Dictionary is a listing of all active statewide reports within infoAdvantage. The listing is updated regularly to provide users:

- The location of each report.
- The data within each report.
- A brief description of each report.
- Any prior names used for the report.

Location

The infoAdvantage Reports Dictionary is located on the GAO website, under the Operations banner and by selecting Operations Resources. It is then listed by Document Name and Last Updated columns on the page listing. Instructions on how to look up this report appear below.

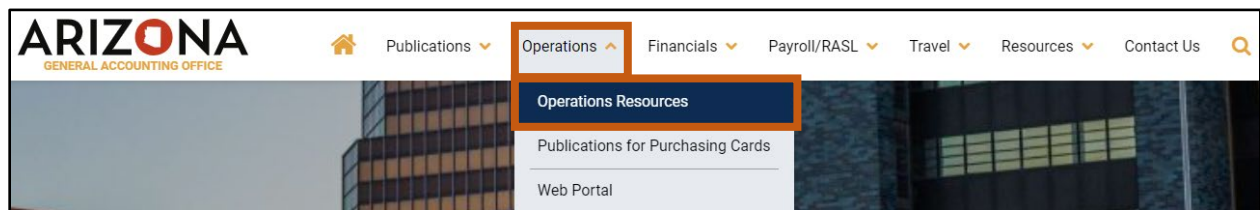
Locating the infoAdvantage Reports Dictionary



Scenario 1.

Locate the infoAdvantage Reports Dictionary on the GAO website.

1. Navigate to the GAO website by typing *gao.az.gov* in the browser window.
2. On the top banner select **Operations**, and then **Operations Resources**.

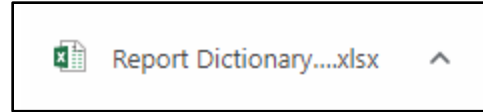


3. The Operations Resources page loads. Under **Document Name**, click on **infoAdvantage Reports Dictionary**.

Document Name	Last Updated
GAO Agency Liaison Contacts	09-18-2023
FY 24 HRIS Modernization Charges & Instructions	08-03-2023
FY24 AFS Charges and Instructions	07-31-2023
infoAdvantage Reports Dictionary	07-21-2023
AZ/Taxes.gov Onboarding for State Agencies	06-27-2023
New State Agency AZ/Taxes.gov Onboarding Checklist	06-27-2023
BFY24 Budget Structure Elections	06-12-2023
FY24 Appropriation Load & Allocation Instructions	05-31-2023
FY23 Appropriation Adjustments Instructions	05-22-2023
Relief Bill Instructions and Procedures	05-15-2023

infoAdvantage Reports Dictionary 07-21-2023

4. Open the excel spreadsheet that populates at the bottom of the screen.



5. The infoAdvantage Reports Dictionary opens.

1-Statewide Reports subfolder	Report ID and Name	Data within the report	Report description and possible uses
Accounts Payable	FIN-AZ-AP-C021 Future Scheduled Payments for Disbursements	Amount	This report lists future payment requirement schedules (cash requirements reporting) for disbursements.
Accounts Payable	FIN-AZ-AP-C021 Future Scheduled Payments for Disbursements	Days Outstanding	This report lists future payment requirement schedules (cash requirements reporting) for disbursements.
Accounts Payable	FIN-AZ-AP-C021 Future Scheduled Payments for Disbursements	Fund	This report lists future payment requirement schedules (cash requirements reporting) for disbursements.
Accounts Payable	FIN-AZ-AP-C021 Future Scheduled Payments for Disbursements	Schedule Date	This report lists future payment requirement schedules (cash requirements reporting) for disbursements.

Usage

The infoAdvantage Reports Dictionary is composed of several filtered columns. Users trying to locate a new report for a business need can sort the 1-Statewide Reports subfolder by the functional area of their request (i.e. Accounts Payable, Accounts Receivable, etc). Once their results are limited, the user can then either filter the results by the Data within the report column or by the Report description and possible uses column. The scenario below will detail how to utilize this resource to locate the desired report.

Finding a report using the infoAdvantage Reports Dictionary

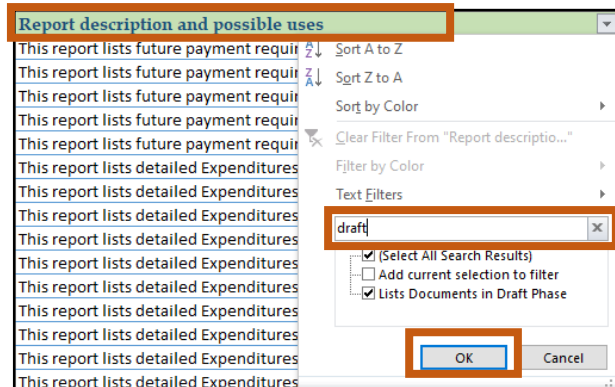


Scenario 2.

A user needs to locate all transactions in Draft phase for their department to aid in their department's year end processing. Utilize the infoAdvantage Reports Dictionary to locate the appropriate report that showcases this information.

Populate the infoAdvantage Reports Dictionary.

1. Complete the steps from the "Locating the infoAdvantage Reports Dictionary" to populate the infoAdvantage Reports Dictionary excel spreadsheet.
2. Sort the **Report description and possible uses** column to only include values for **draft**.
3. Click **OK**.
4. The returned results provide the report by name and ID, a report description and any prior names for the report.
5. In this scenario, the **FIN-AZ-DCAT-N522 Draft Doc(s) by Dept** report will provide the user with the desired information.





Report ID and Name	Data within the report	Report description and possible uses	Prior Report Name
FIN-AZ-DCAT-N522 Draft Doc(s) by Dept	Department	Lists Documents in Draft Phase	FIN-AZ-DCAT-N522 Document Detail - Draft Documents
FIN-AZ-DCAT-N522 Draft Doc(s) by Dept	Department Document Count	Lists Documents in Draft Phase	FIN-AZ-DCAT-N522 Document Detail - Draft Documents
FIN-AZ-DCAT-N522 Draft Doc(s) by Dept	Document (Code, Dept, ID, Vers)	Lists Documents in Draft Phase	FIN-AZ-DCAT-N522 Document Detail - Draft Documents
FIN-AZ-DCAT-N522 Draft Doc(s) by Dept	Document Function	Lists Documents in Draft Phase	FIN-AZ-DCAT-N522 Document Detail - Draft Documents
FIN-AZ-DCAT-N522 Draft Doc(s) by Dept	Document Header Actual Amount	Lists Documents in Draft Phase	FIN-AZ-DCAT-N522 Document Detail - Draft Documents
FIN-AZ-DCAT-N522 Draft Doc(s) by Dept	Document Header Closed Amount	Lists Documents in Draft Phase	FIN-AZ-DCAT-N522 Document Detail - Draft Documents
FIN-AZ-DCAT-N522 Draft Doc(s) by Dept	Document Header Creation Date	Lists Documents in Draft Phase	FIN-AZ-DCAT-N522 Document Detail - Draft Documents
FIN-AZ-DCAT-N522 Draft Doc(s) by Dept	Document Header Creation User ID	Lists Documents in Draft Phase	FIN-AZ-DCAT-N522 Document Detail - Draft Documents
FIN-AZ-DCAT-N522 Draft Doc(s) by Dept	Document Header Document Description	Lists Documents in Draft Phase	FIN-AZ-DCAT-N522 Document Detail - Draft Documents
FIN-AZ-DCAT-N522 Draft Doc(s) by Dept	Document Status	Lists Documents in Draft Phase	FIN-AZ-DCAT-N522 Document Detail - Draft Documents
FIN-AZ-DCAT-N522 Draft Doc(s) by Dept	Doc Unit Code	Lists Documents in Draft Phase	FIN-AZ-DCAT-N522 Document Detail - Draft Documents
FIN-AZ-DCAT-N522 Draft Doc(s) by Dept	Doc Phase Code	Lists Documents in Draft Phase	FIN-AZ-DCAT-N522 Document Detail - Draft Documents
FIN-AZ-DCAT-N522 Draft Doc(s) by Dept	Vendor Code	Lists Documents in Draft Phase	FIN-AZ-DCAT-N522 Document Detail - Draft Documents
FIN-AZ-DCAT-N522 Draft Doc(s) by Dept	Vendor Legal Name	Lists Documents in Draft Phase	FIN-AZ-DCAT-N522 Document Detail - Draft Documents
FIN-AZ-DCAT-N522 Draft Doc(s) by Dept	Unit	Lists Documents in Draft Phase	FIN-AZ-DCAT-N522 Document Detail - Draft Documents
FIN-AZ-DCAT-N522 Draft Doc(s) by Dept	District	Lists Documents in Draft Phase	FIN-AZ-DCAT-N522 Document Detail - Draft Documents

Report ID and Name
FIN-AZ-DCAT-N522 Draft Doc(s) by Dept

Report description and possible uses
Lists Documents in Draft Phase

Finding Reports in infoAdvantage

Section Objectives

In this section, the following processes are introduced:

- Basic folder navigation in infoAdvantage.
- Sorting and filtering reports in infoAdvantage.

Section Overview

Once a report has been located on the infoAdvantage Reports Dictionary, a user can log in to infoAdvantage using the AZ360 application to access the report.

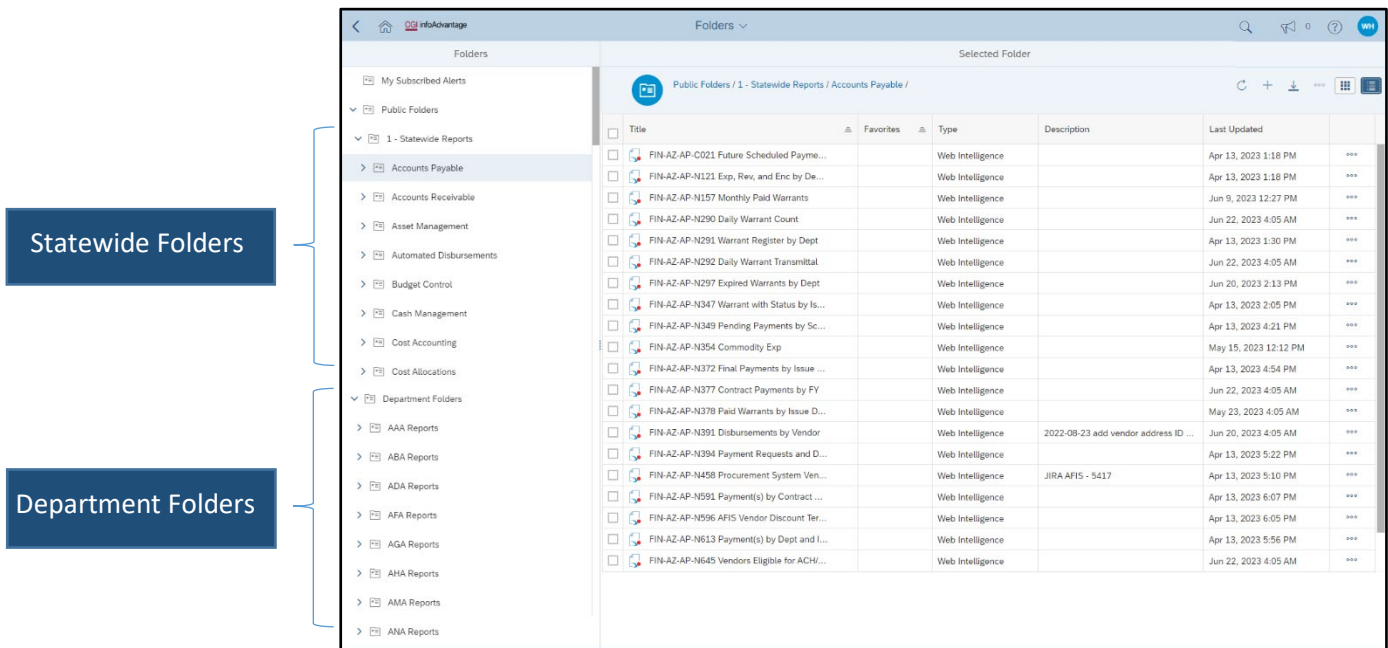
Folder Navigation

All reports are located within folders within infoAdvantage. Folders are organized into subfolders. The folder structure is helpful in locating needed reports. Navigation in infoAdvantage is similar to that of other programs. Use the Expand caret next to the folders to expand and collapse the folder to navigate through the folders and subfolders.

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

Note: The report name gives a clue to the functional area/folder the report can be found in.

In addition to the 1 - Statewide Reports folders, each agency has an On Demand Reports folder. The agency folders are intended to make it easy for users to find the reports that their agency uses, whether those are pre-generated or on-demand reports. Users can create shortcuts to the 1 - Statewide Reports folder into their agency’s folder so that the reports are easy for others in the agency to find and use.



The screenshot displays the infoAdvantage interface. On the left, a navigation pane shows a hierarchy of folders: 'Public Folders', '1 - Statewide Reports', and 'Department Folders'. The '1 - Statewide Reports' folder is expanded, showing subfolders like 'Accounts Payable', 'Accounts Receivable', 'Asset Management', etc. A blue callout box labeled 'Statewide Folders' points to this section. The 'Department Folders' section includes 'AAA Reports', 'ABA Reports', 'ADA Reports', 'AFA Reports', 'AGA Reports', 'AHA Reports', 'AMA Reports', and 'ANA Reports'. A second blue callout box labeled 'Department Folders' points to this section. The main pane shows the 'Selected Folder' path: 'Public Folders / 1 - Statewide Reports / Accounts Payable /'. Below this is a table of reports with columns for Title, Favorites, Type, Description, and Last Updated.

Title	Favorites	Type	Description	Last Updated
FIN-AZ-AP-C021 Future Scheduled Payme...		Web Intelligence		Apr 13, 2023 1:18 PM
FIN-AZ-AP-N121 Exp, Rev, and Enc by De...		Web Intelligence		Apr 13, 2023 1:18 PM
FIN-AZ-AP-N157 Monthly Paid Warrants		Web Intelligence		Jun 9, 2023 12:27 PM
FIN-AZ-AP-N290 Daily Warrant Count		Web Intelligence		Jun 22, 2023 4:05 AM
FIN-AZ-AP-N291 Warrant Register by Dept		Web Intelligence		Apr 13, 2023 1:30 PM
FIN-AZ-AP-N292 Daily Warrant Transmittal		Web Intelligence		Jun 22, 2023 4:05 AM
FIN-AZ-AP-N297 Expired Warrants by Dept		Web Intelligence		Jun 20, 2023 2:13 PM
FIN-AZ-AP-N347 Warrant with Status by Is...		Web Intelligence		Apr 13, 2023 2:05 PM
FIN-AZ-AP-N349 Pending Payments by Sc...		Web Intelligence		Apr 13, 2023 4:21 PM
FIN-AZ-AP-N354 Commodity Exp		Web Intelligence		May 15, 2023 12:12 PM
FIN-AZ-AP-N372 Final Payments by Issue ...		Web Intelligence		Apr 13, 2023 4:54 PM
FIN-AZ-AP-N377 Contract Payments by FY		Web Intelligence		Jun 22, 2023 4:05 AM
FIN-AZ-AP-N378 Paid Warrants by Issue D...		Web Intelligence		May 23, 2023 4:05 AM
FIN-AZ-AP-N391 Disbursements by Vendor		Web Intelligence	2022-08-23 add vendor address ID ...	Apr 13, 2023 4:05 AM
FIN-AZ-AP-N394 Payment Requests and D...		Web Intelligence		Apr 13, 2023 5:22 PM
FIN-AZ-AP-N458 Procurement System Ven...		Web Intelligence	JIRA AFIS - 5417	Apr 13, 2023 5:10 PM
FIN-AZ-AP-N591 Payment(s) by Contract ...		Web Intelligence		Apr 13, 2023 6:07 PM
FIN-AZ-AP-N596 AFIS Vendor Discount Ter...		Web Intelligence		Apr 13, 2023 6:05 PM
FIN-AZ-AP-N613 Payment(s) by Dept and I...		Web Intelligence		Apr 13, 2023 5:56 PM
FIN-AZ-AP-N645 Vendors Eligible for ACH/...		Web Intelligence		Jun 22, 2023 4:05 AM

The steps below detail the ideal method of locating a 1 - Statewide Report in infoAdvantage.

Locate a 1 - Statewide Report in infoAdvantage

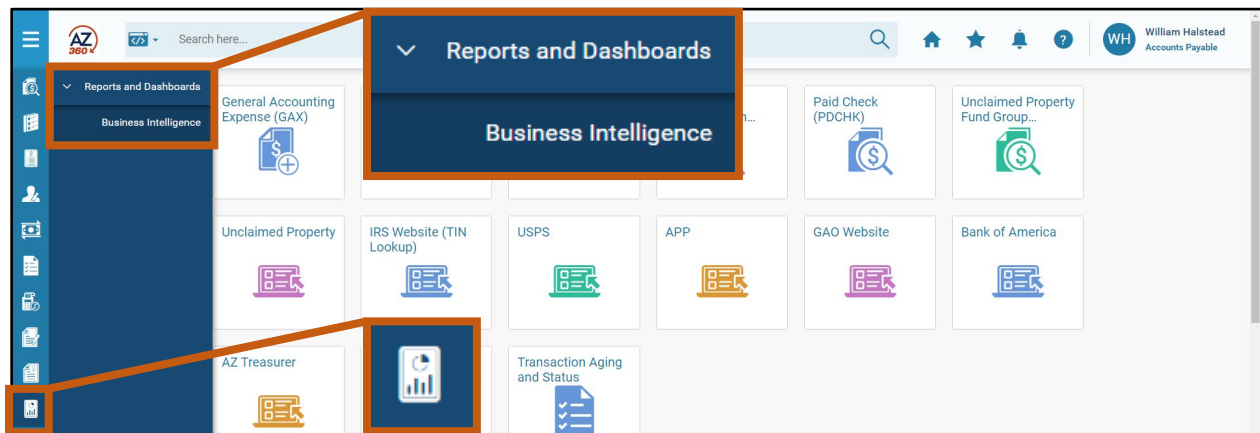


Scenario 1.

A user has located the **FIN-AZ-DCAT-N522** report using the infoAdvantage Report Dictionary. The user will now access the report in infoAdvantage by first logging into AZ360.

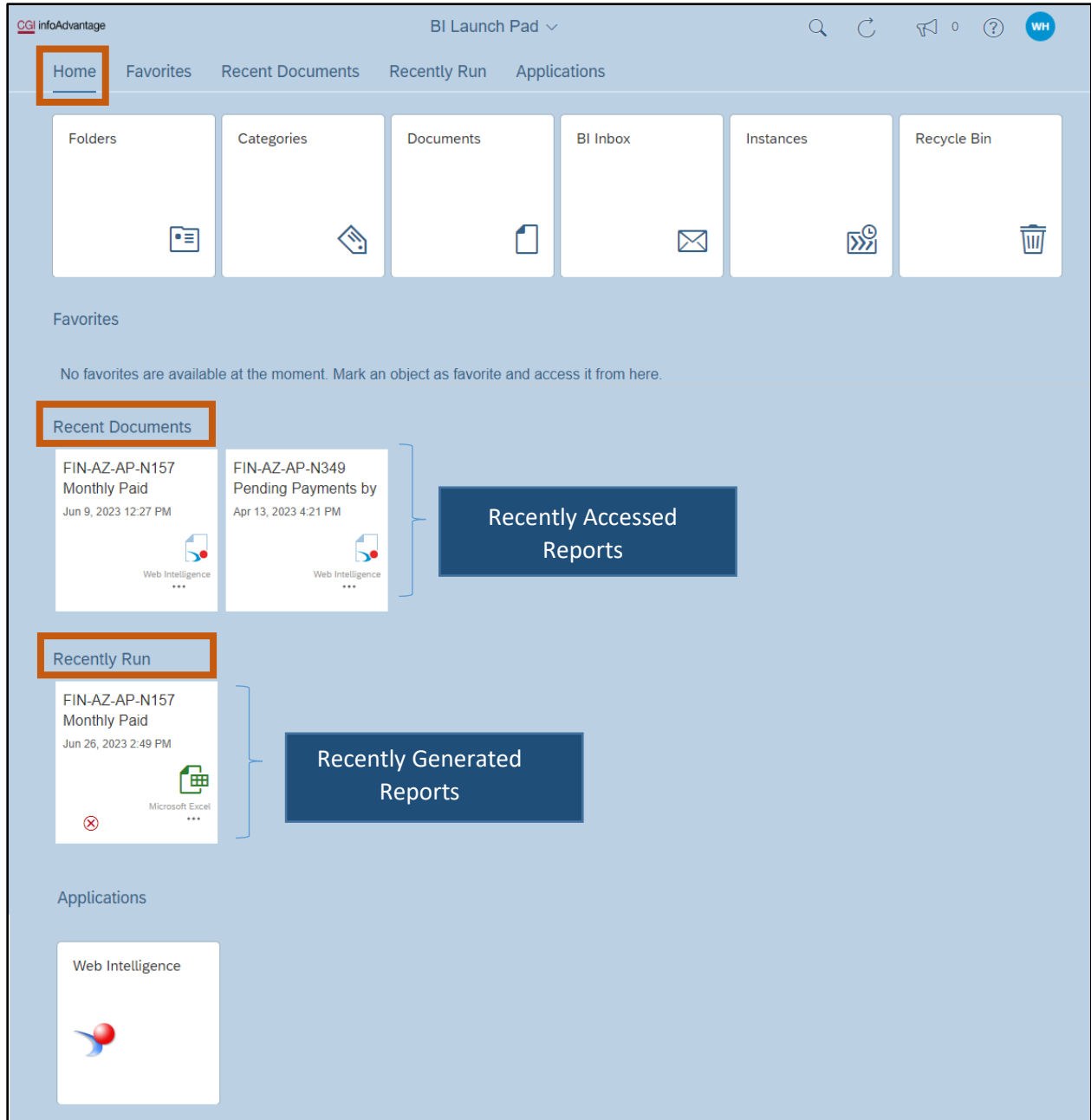
Launch infoAdvantage from within the AZ360 application.

1. From the AZ360 homepage, click on the **Business Intelligence icon** under the **Navigation Menu** on the left side of the screen.
2. Click **Reports and Dashboards** and then click **Business Intelligence**.



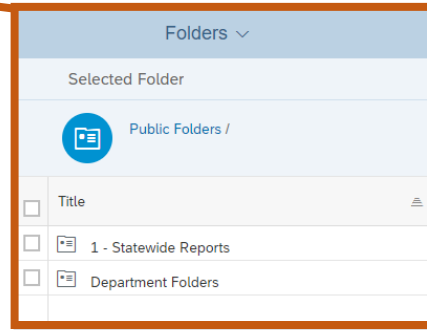
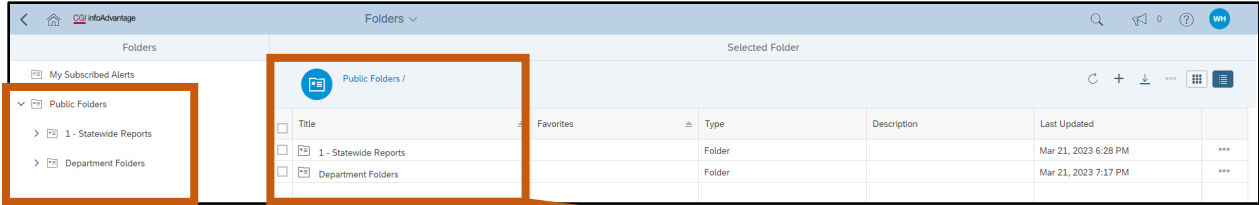
3. The infoAdvantage application home page will then open in a separate window. Notice any recently accessed reports will appear under the Recent Documents section and any reports that were recently run, either successfully or failed, will appear under the Recently Run section.

Note: The GAO Reporting Team recommends that users do not become reliant on using the Recently Run link. Changes to reports or report location are not detected accurately when using the Recently Run links.

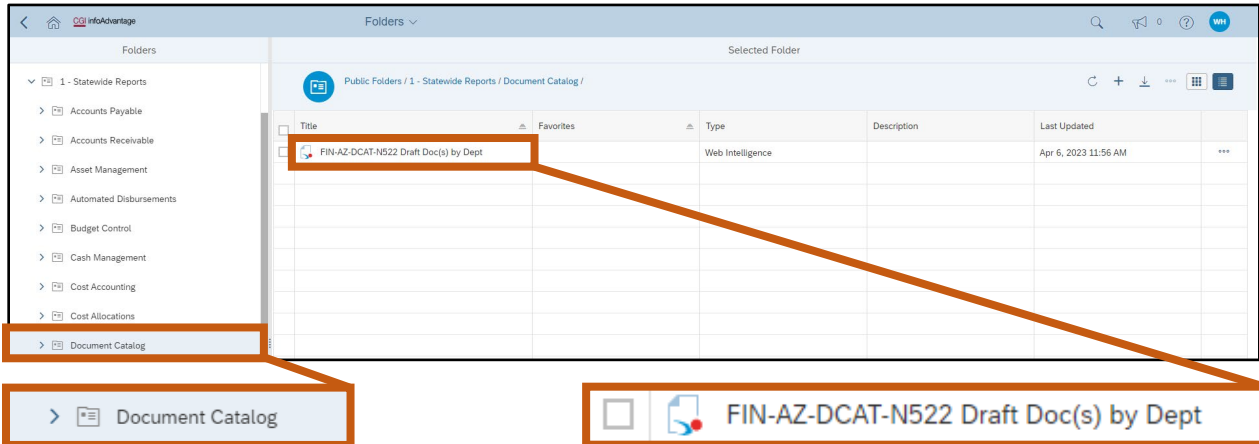


Locate the **FIN-AZ-DCAT-N522** infoAdvantage report.

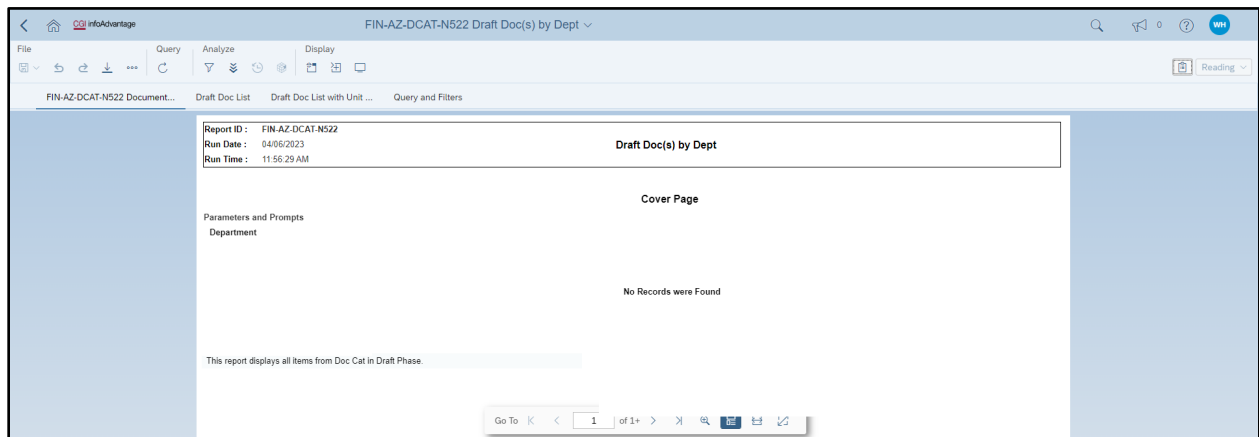
1. Click the **Folders** icon at the top left of the screen.
2. Click the **Expand** caret next to **Public Folders** and choose **1 - Statewide Reports**. Conversely, a user can click the **1 - Statewide Reports** folder from the Selected Folder grid.



3. Click on the **Document Catalog** folder.
4. Select the **FIN-AZ-DCAT-N522** report from the Selected Folder grid.



5. Click on the **FIN-AZ-DCAT-N522** report and the report will open to the cover page.





Sorting and Filtering Reports

Additional functionality is accessible by clicking the column header sort button within the Selected Folder grid:

- Sort a column by ascending or descending values.
- Filter a column by entering a search criteria next to the filter icon.

Note: Do not forget to clear the filter before conducting another search.

<input type="checkbox"/>	Title	<input type="checkbox"/>	Favorites	<input type="checkbox"/>	Type	Description	Last Updated	
<input type="checkbox"/>	FIN-AZ-AP-C021 Future Scheduled Payme...	<input type="checkbox"/>			Web Intelligence		Apr 13, 2023 1:18 PM	...
<input type="checkbox"/>	FIN-AZ-AP-N121 Exp, Rev, and Enc by De...	<input type="checkbox"/>			Web Intelligence		Apr 13, 2023 1:18 PM	...
<input type="checkbox"/>	FIN-AZ-AP-N157 Monthly Paid Warrants	<input type="checkbox"/>			Web Intelligence		Jun 9, 2023 12:27 PM	...

A dropdown menu is shown, containing three options: 'Sort Ascending', 'Sort Descending', and 'Filter'. The 'Filter' option includes a text input field. An orange arrow points from the sort button in the table above to this dropdown menu.

Opening and Running a Report

Section Objectives

In this section, the following processes are introduced:

- Opening a report in view mode.
- Running a report with report prompts.
- Navigating a generated report.

Section Overview

infoAdvantage reports allow users to query AZ360 for specific accounting information. Report results should be limited by the use of prompts to both cut down on the time it takes to generate the report and limit the filtering that users need to perform to the report extract.

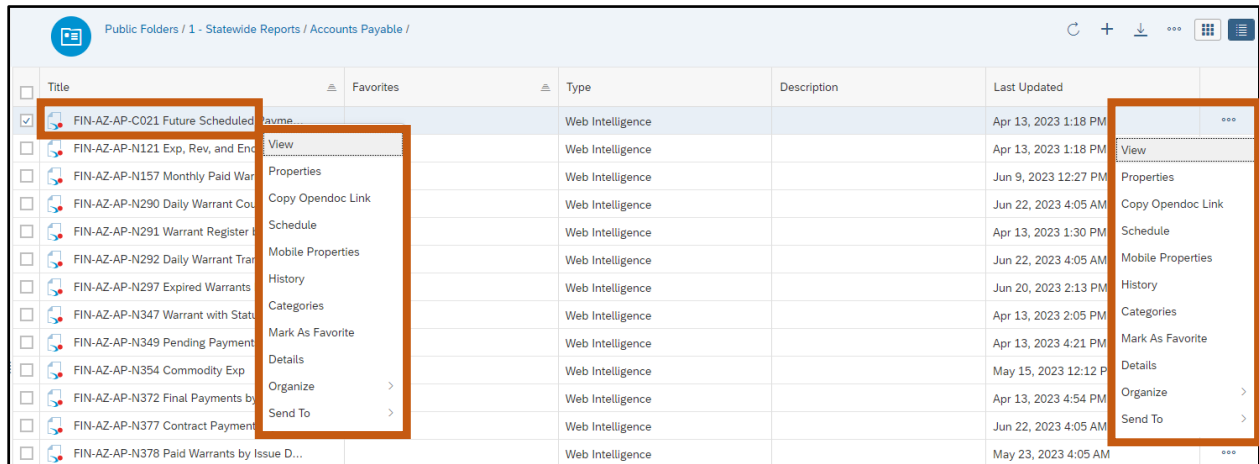
Report Running Steps

There are four basic steps to running a report:

1. Open the report.
2. Click on refresh, if necessary.
3. Enter the search criteria into the prompts.
4. Run the report.

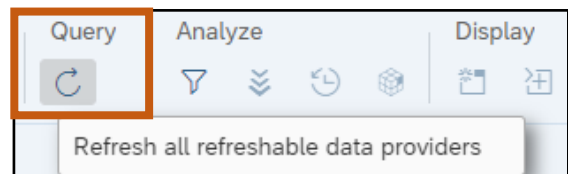
Open the Report

Reports in infoAdvantage can be opened either by clicking the report, right-clicking and choosing View, or by selecting View from the 3-dot menu on the right of the grid.



Refresh the Report

Refresh the report to initiate the prompts. Reports should also be refreshed so users see the most current data; either one day behind or current data depending on the report prefix.



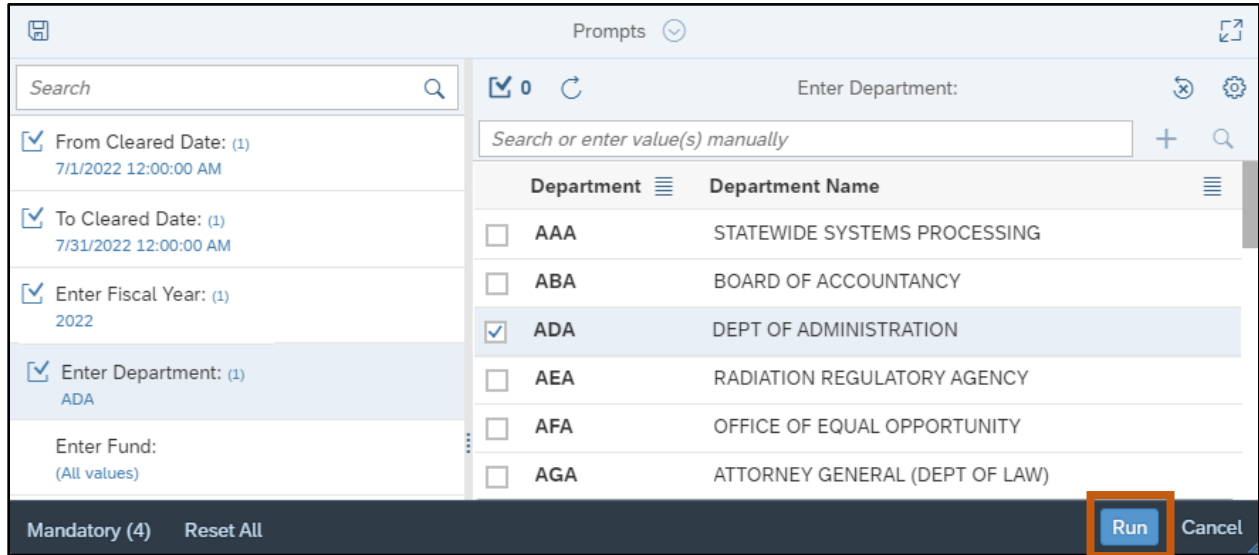
Enter Report Prompts

Report prompts are entered to retrieve the desired information from a report. Each report has a different set of prompts based upon the purpose of the report and its underlying data. This feature will be explained in more detail in the upcoming “Report Prompts” section of this manual.

Running the Report

After all required report prompts have been entered, the user then needs to click the Run button at the bottom right of the Prompts window.

Note: The Run button will light up blue when all required fields have been selected.



The screenshot shows the 'Prompts' window with a search bar and a list of departments. The 'Run' button is highlighted in blue, indicating that all required fields have been selected.

Department	Department Name
<input type="checkbox"/>	AAA STATEWIDE SYSTEMS PROCESSING
<input type="checkbox"/>	ABA BOARD OF ACCOUNTANCY
<input checked="" type="checkbox"/>	ADA DEPT OF ADMINISTRATION
<input type="checkbox"/>	AEA RADIATION REGULATORY AGENCY
<input type="checkbox"/>	AFA OFFICE OF EQUAL OPPORTUNITY
<input type="checkbox"/>	AGA ATTORNEY GENERAL (DEPT OF LAW)

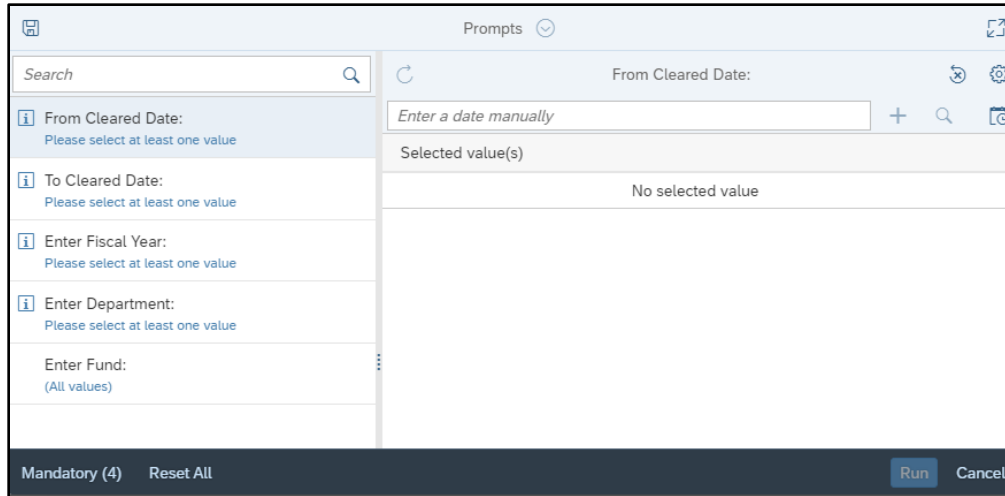
Note: While users have the ability to run a report on-demand, it is strongly recommended that they utilize the report scheduling functionality in infoAdvantage. For additional information on this feature, see the QRG Scheduling Reports in infoAdvantage available at <https://gao.az.gov/resources/training/gao-training-resources>.

Report Prompts

Users enter prompts with the Prompts window.

Prompts Window

The Prompts window may appear automatically when a user opens the report (depending upon the report) and will appear when Refreshing the report.



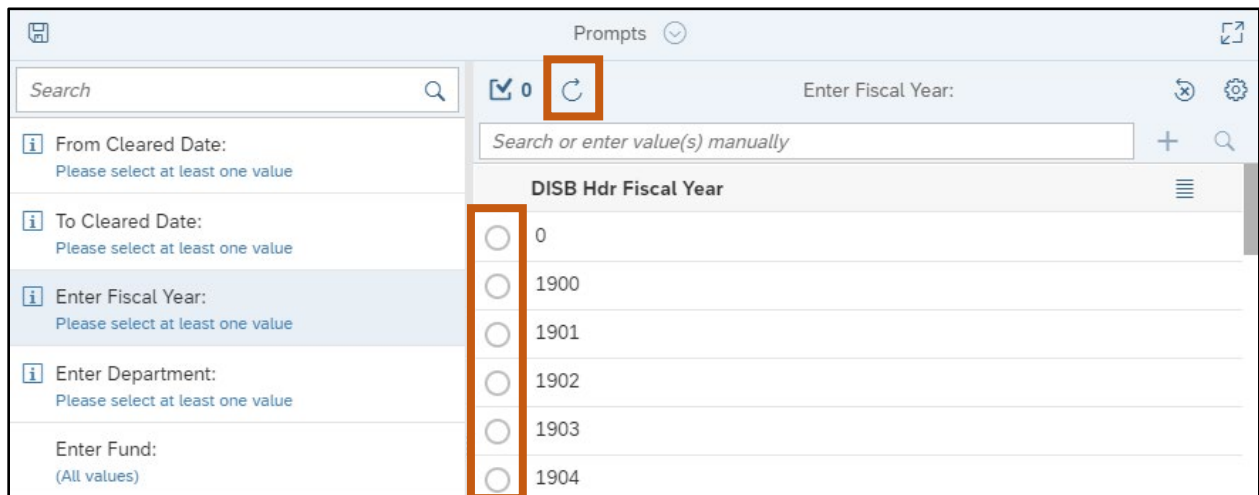
Prompts with an **i** icon are required. Prompts not displaying the **i** icon are not required. A user can enter prompts to further refine what they are looking for.

Note that once a user enters a value in a required prompt and clicks the “+” symbol, the prompt will turn from the **i** icon to the **✓** icon.

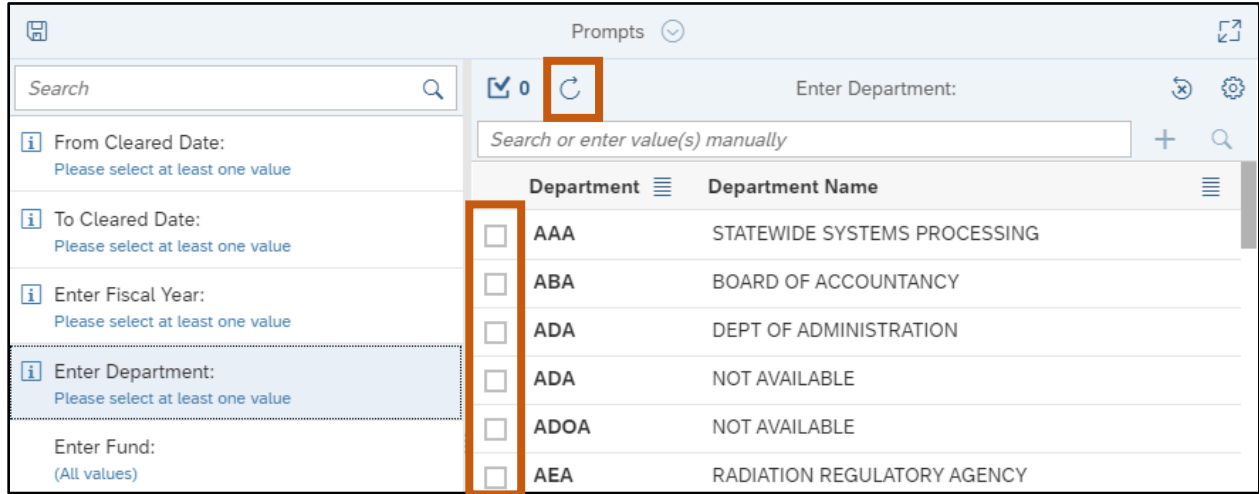
Users are either limited to one prompt entry or can enter multiple entries dependent on the options available on the prompt answers page.

- Radio buttons – User is limited to one entry. If a user is not sure if a field is limited to one value or not, they should click the refresh button on the prompt answers page and a radio button list will generate if applicable.
- Checkboxes – Users can make multiple selections. If a user is not sure if a field is limited to one value or not, they should click the refresh button on the prompt answers page and a checkbox list will generate if applicable.

Radio Buttons



Checkboxes



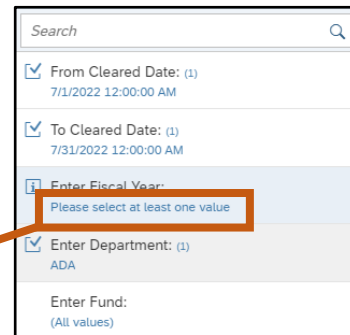
Entering Criteria into the Prompts

The values entered in the prompts define the data that is returned, and it is very important to enter the **correct** criteria.

- infoAdvantage is case sensitive. ‘ada’ is **not** the same as ‘ADA’. If a user enters ada instead of ADA, no records will be returned.
- infoAdvantage does exact matches (unless specified in the prompt description). A user has to know their agency’s data and how it is entered in AZ360 so that they can enter matching criteria. If in doubt, a user should talk with their financial teams about how their data is entered.

After entering all search criteria, verify that the selected values appear under the prompt fields on the left side of the Prompts screen. If any of the required prompt fields still have “Please select at least one value” alert listed below them, re-enter the prompt criteria.

Please select at least one value



The scenario below details the steps involved in running a report in infoAdvantage.

Running a Report using Report Prompts



Scenario 1.

A user has accessed the **FIN-AZ-AP-N157 Monthly Paid Warrants** report in infoAdvantage and now needs to enter their agency-specific prompts to retrieve desired agency information. User's agency-specific information being entered in this scenario:

From Cleared Date: 07/01/2022

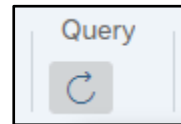
To Cleared Date: 07/31/2022

Fiscal Year: 2022

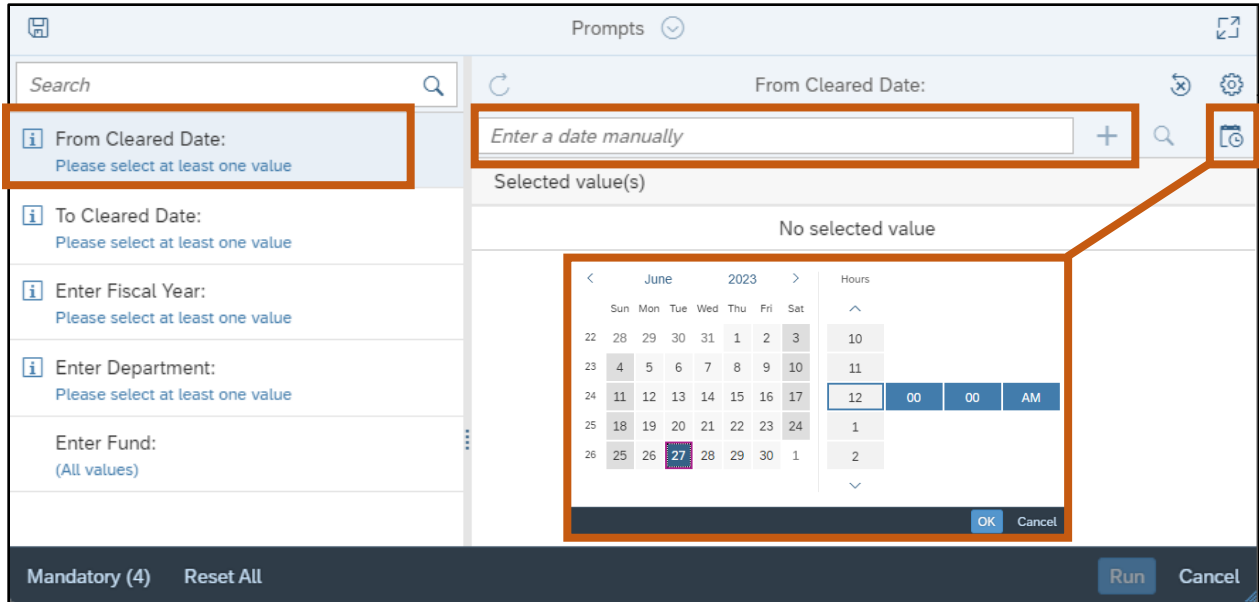
Department: ADA

Enter report prompts to retrieve desired information.

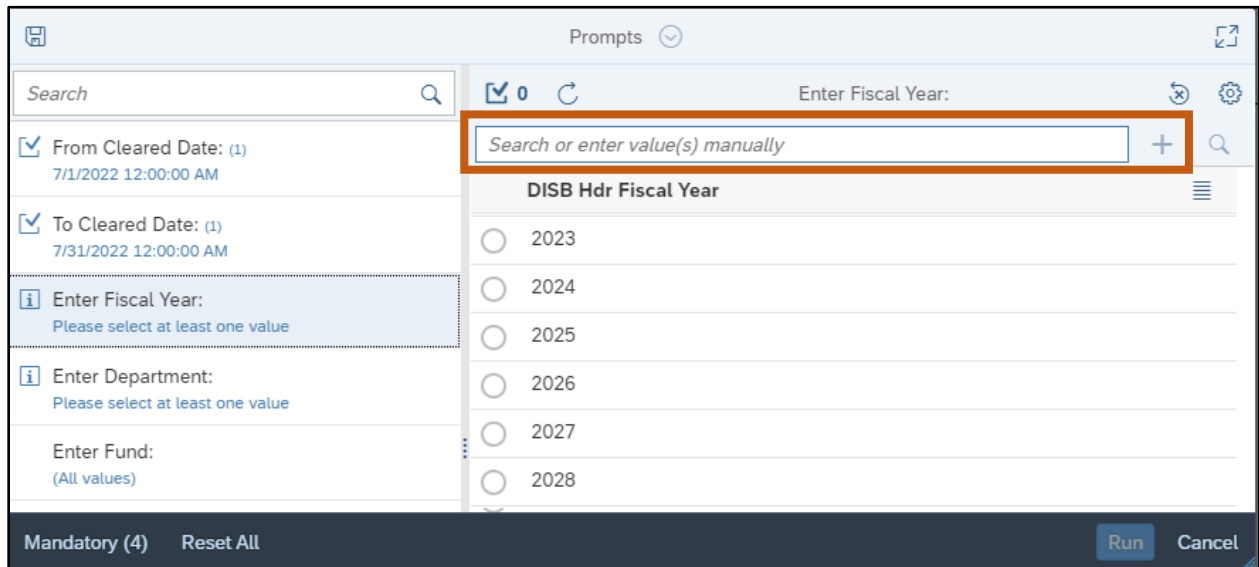
1. Complete the steps from the "Locate a Statewide Report in infoAdvantage" scenario to call up the cover page for the **FIN-AZ-AP-N157** report. Note that this report is located under the Accounts Payable folder while the report highlighted in the previous scenario was located under the Document Catalog folder.
2. Click the **Refresh** button.
3. On the **Prompts** screen that populates:
 - a. With the **From Cleared Date** field selected, enter *07/01/2022* in the **Enter a date manually** field and click the "+" sign.



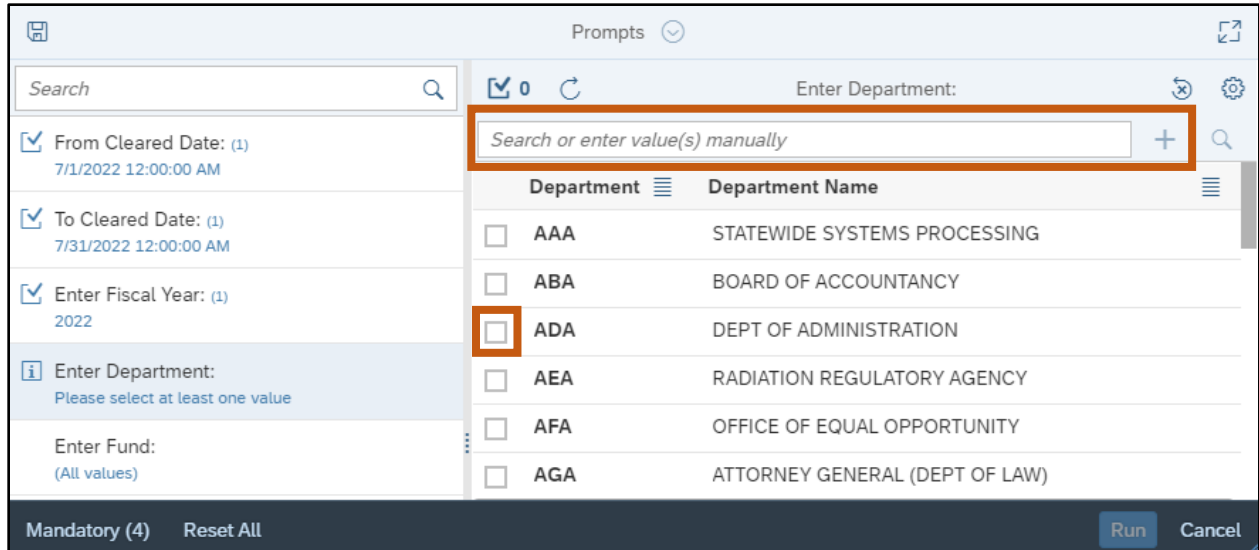
Note: Alternatively, to minimize typing errors, users can select the calendar icon to select a date and then click OK for the date to populate in the prompt answers page.



- b. With the **To Cleared Date** field selected, enter *07/31/2022* in the **Enter a date manually** field and click the “+” sign.
- c. With the **Enter Fiscal Year** field selected, enter *2022* in the **Search or enter value(s) manually** field and click the “+” sign.



- d. With the **Enter Department** field selected, enter *ADA* in the **Search or enter value(s) manually** field and click the “+” sign. Alternatively, select the checkbox next to *ADA DEPT OF ADMINISTRATION* from the Selected value(s) list.

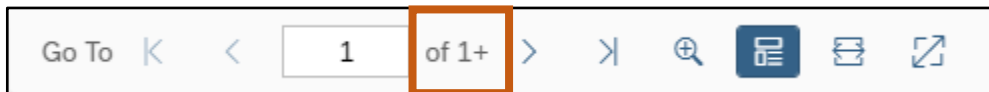


4. Click **Run**. The report will run and return data based upon the entered prompts.

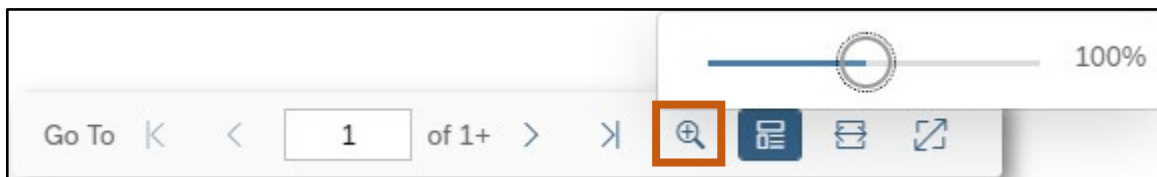
Navigating a Generated Report




Navigating an infoAdvantage report that has been run is similar to navigating in other documents and programs.

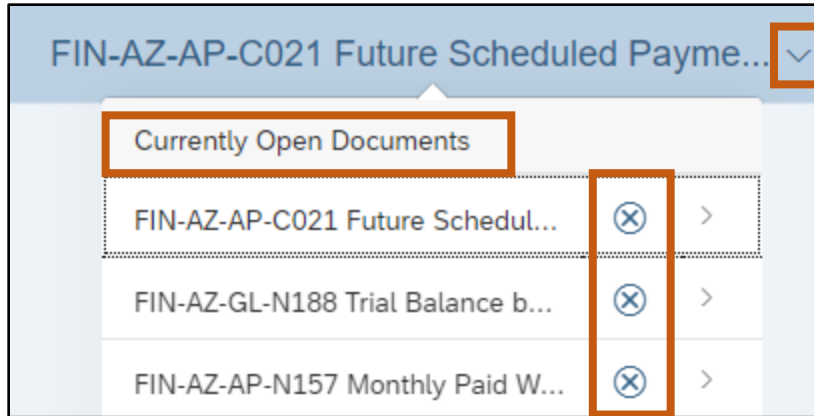
- Page navigation shows at the bottom of the report window. More than one page will be indicated by 1+.





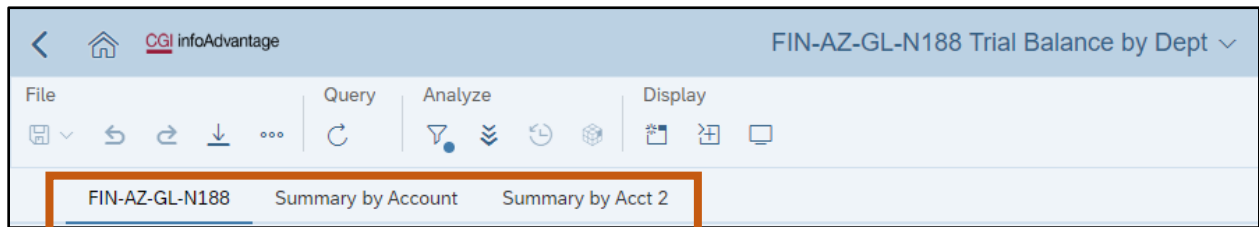
- The view can be scaled using the Zoom control.



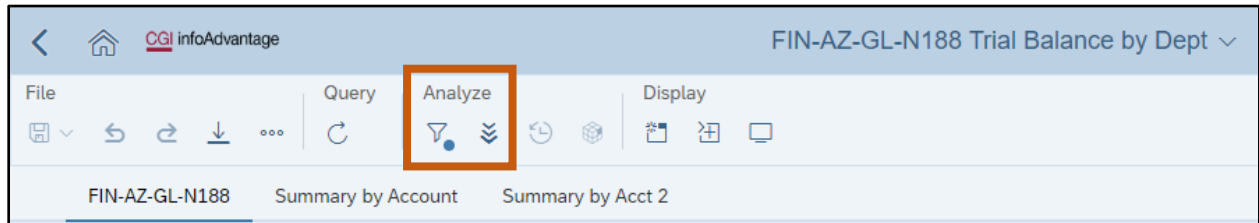
- Back  and forward  buttons move users through the pages.
- Multiple reports can be open at the same time. Click the Expand caret at the top of the screen to view the other reports that are open. To close a report without saving, click the  icon.



- Click the Home  icon to go to the Home page.
- Click the back button  to return to the previously viewed location or report.
- Some reports have multiple tabs. Select the tab to view the corresponding data.



- Generated report results can be sorted using the Filter bar and Navigation buttons under the Analyze banner section.



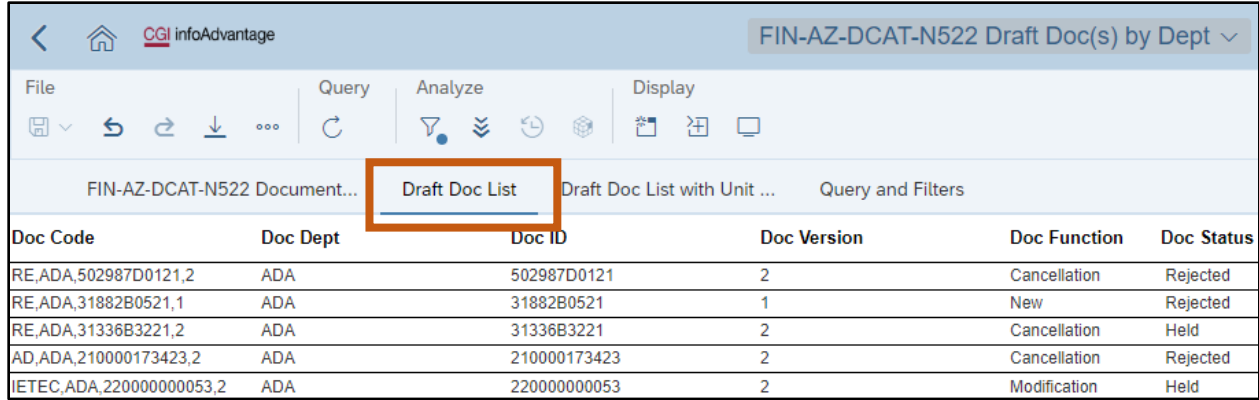
Navigating a Generated Report

Scenario 2.

A user has run the **FIN-AZ-DCAT-N522** report in infoAdvantage and now needs to sort their results before they extract the report to an Excel spreadsheet. Use the Analyze tool to limit report results to only show Internal Transaction Agreement (ITA) transactions in Draft phase.

Generate the **FIN-AZ-DCAT-N522** report in infoAdvantage.

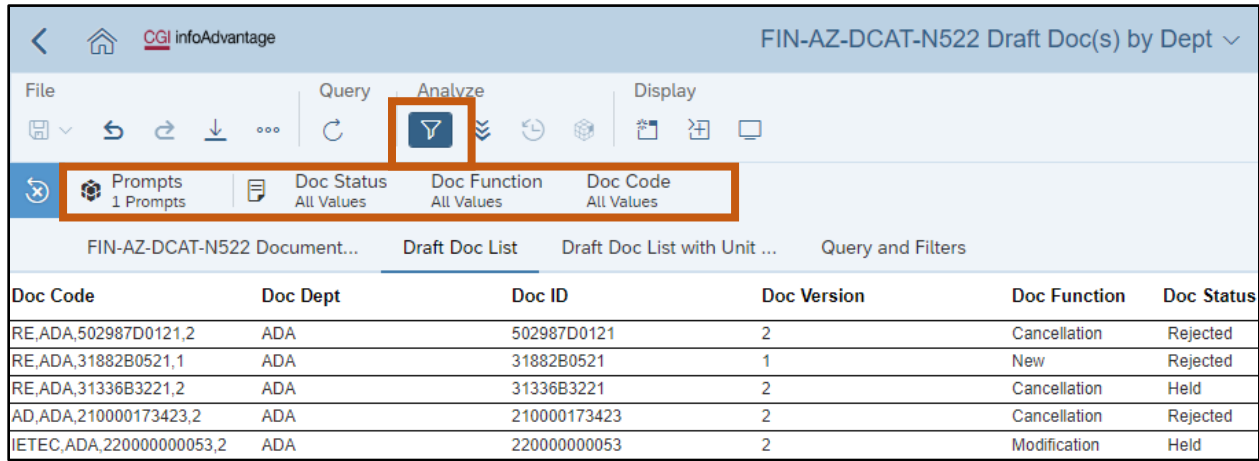
1. Complete the steps from “Locate a Statewide Report in infoAdvantage” scenario to call up the cover page for the **FIN-AZ-DCAT-N522** report.
2. Click the **Draft Doc List** tab header to call up the report results.



The screenshot shows the 'CGI infoAdvantage' interface with the 'FIN-AZ-DCAT-N522 Draft Doc(s) by Dept' report. The 'Analyze' section is active, and the 'Draft Doc List' tab is highlighted with a red box. Below the tabs is a table with the following data:

Doc Code	Doc Dept	Doc ID	Doc Version	Doc Function	Doc Status
RE,ADA,502987D0121,2	ADA	502987D0121	2	Cancellation	Rejected
RE,ADA,31882B0521,1	ADA	31882B0521	1	New	Rejected
RE,ADA,31336B3221,2	ADA	31336B3221	2	Cancellation	Held
AD,ADA,210000173423,2	ADA	210000173423	2	Cancellation	Rejected
IETEC,ADA,220000000053,2	ADA	220000000053	2	Modification	Held

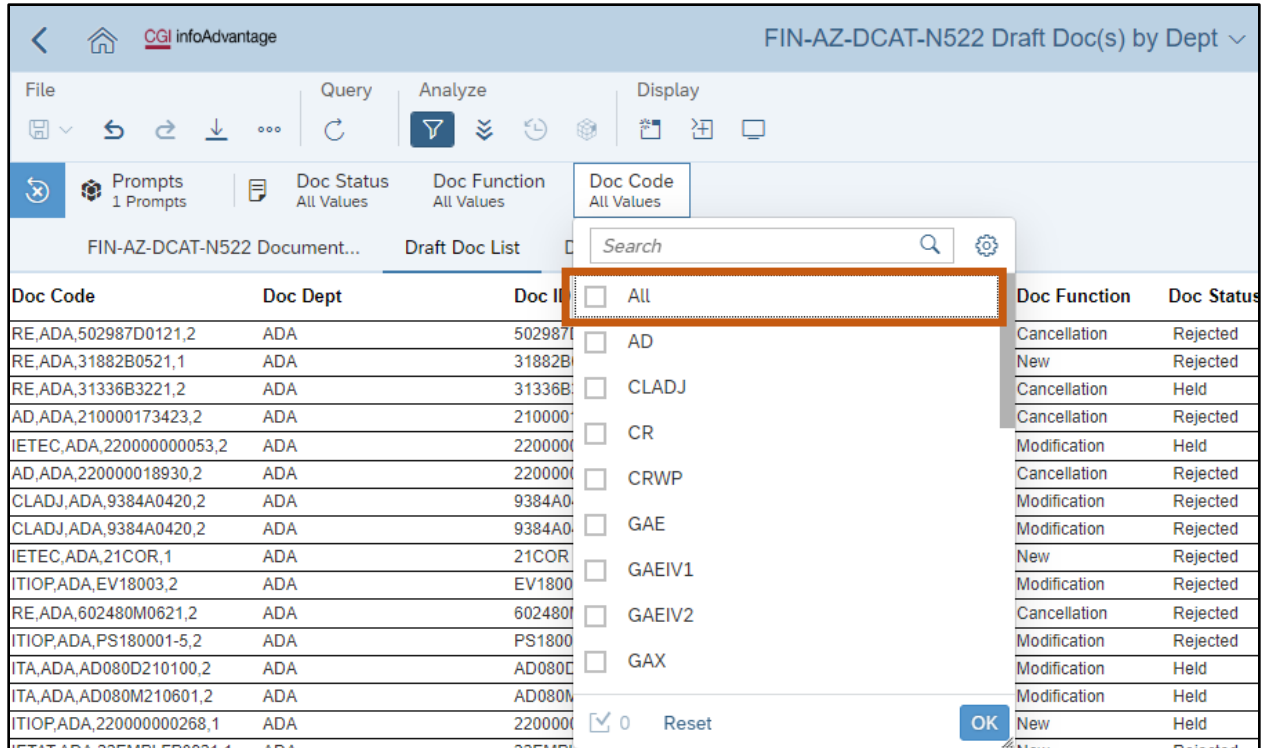
3. In the **Analyze** section, click the **Filter** icon. Notice the report input controls that appear on screen and that can be used to filter the report results.



The screenshot shows the 'CGI infoAdvantage' interface with the 'FIN-AZ-DCAT-N522 Draft Doc(s) by Dept' report. The 'Analyze' section is active, and the 'Filter' icon is highlighted with a red box. A dropdown menu is open for 'Doc Code', showing 'All Values' selected. Below the dropdown is a table with the following data:

Doc Code	Doc Dept	Doc ID	Doc Version	Doc Function	Doc Status
RE,ADA,502987D0121,2	ADA	502987D0121	2	Cancellation	Rejected
RE,ADA,31882B0521,1	ADA	31882B0521	1	New	Rejected
RE,ADA,31336B3221,2	ADA	31336B3221	2	Cancellation	Held
AD,ADA,210000173423,2	ADA	210000173423	2	Cancellation	Rejected
IETEC,ADA,220000000053,2	ADA	220000000053	2	Modification	Held

4. Click **Doc Code All Values**.
5. From the drop down menu that generates, unselect the **checkbox** for **All**.



FIN-AZ-DCAT-N522 Draft Doc(s) by Dept

File Query Analyze Display

Prompts 1 Prompts Doc Status All Values Doc Function All Values Doc Code All Values

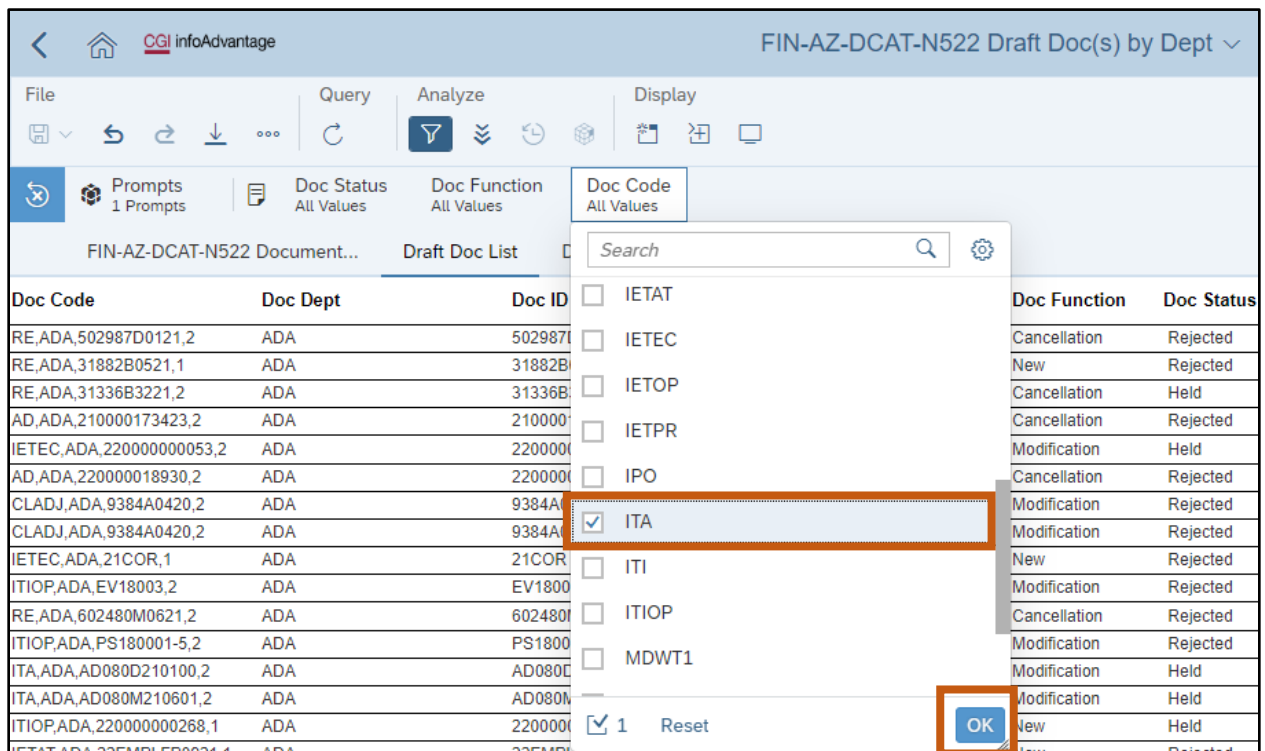
FIN-AZ-DCAT-N522 Document... Draft Doc List Search

Doc Code	Doc Dept	Doc ID	<input type="checkbox"/> All	Doc Function	Doc Status
RE,ADA,502987D0121,2	ADA	502987	<input type="checkbox"/>	Cancellation	Rejected
RE,ADA,31882B0521,1	ADA	31882B	<input type="checkbox"/>	New	Rejected
RE,ADA,31336B3221,2	ADA	31336B	<input type="checkbox"/>	Cancellation	Held
AD,ADA,210000173423,2	ADA	210000	<input type="checkbox"/>	Cancellation	Rejected
IETEC,ADA,220000000053,2	ADA	220000	<input type="checkbox"/>	Modification	Held
AD,ADA,220000018930,2	ADA	220000	<input type="checkbox"/>	Cancellation	Rejected
CLADJ,ADA,9384A0420,2	ADA	9384A0	<input type="checkbox"/>	Modification	Rejected
CLADJ,ADA,9384A0420,2	ADA	9384A0	<input type="checkbox"/>	Modification	Rejected
IETEC,ADA,21COR,1	ADA	21COR	<input type="checkbox"/>	New	Rejected
ITIOP,ADA,EV18003,2	ADA	EV1800	<input type="checkbox"/>	Modification	Rejected
RE,ADA,602480M0621,2	ADA	602480	<input type="checkbox"/>	Cancellation	Rejected
ITIOP,ADA,PS180001-5,2	ADA	PS1800	<input type="checkbox"/>	Modification	Rejected
ITA,ADA,AD080D210100,2	ADA	AD080D	<input type="checkbox"/>	Modification	Held
ITA,ADA,AD080M210601,2	ADA	AD080M	<input type="checkbox"/>	Modification	Held
ITIOP,ADA,220000000268,1	ADA	220000	<input checked="" type="checkbox"/>	New	Held

0 Reset OK

6. Scroll down and select the **checkbox** for **ITA**.

7. Click **OK**.



FIN-AZ-DCAT-N522 Draft Doc(s) by Dept

File Query Analyze Display

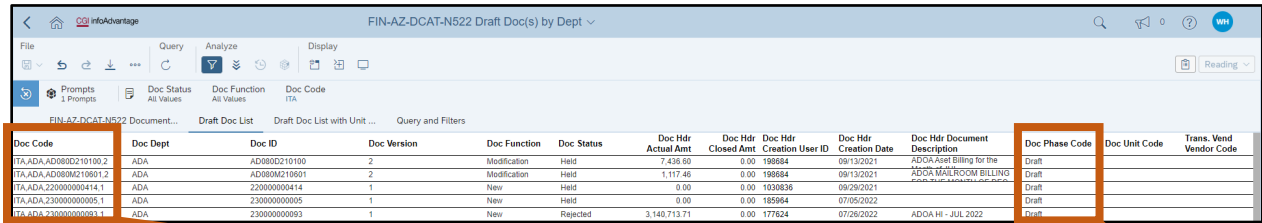
Prompts 1 Prompts Doc Status All Values Doc Function All Values Doc Code All Values

FIN-AZ-DCAT-N522 Document... Draft Doc List Search

Doc Code	Doc Dept	Doc ID	<input type="checkbox"/> IETAT	Doc Function	Doc Status
RE,ADA,502987D0121,2	ADA	502987	<input type="checkbox"/>	Cancellation	Rejected
RE,ADA,31882B0521,1	ADA	31882B	<input type="checkbox"/>	New	Rejected
RE,ADA,31336B3221,2	ADA	31336B	<input type="checkbox"/>	Cancellation	Held
AD,ADA,210000173423,2	ADA	210000	<input type="checkbox"/>	Cancellation	Rejected
IETEC,ADA,220000000053,2	ADA	220000	<input type="checkbox"/>	Modification	Held
AD,ADA,220000018930,2	ADA	220000	<input type="checkbox"/>	Cancellation	Rejected
CLADJ,ADA,9384A0420,2	ADA	9384A0	<input checked="" type="checkbox"/>	Modification	Rejected
CLADJ,ADA,9384A0420,2	ADA	9384A0	<input type="checkbox"/>	Modification	Rejected
IETEC,ADA,21COR,1	ADA	21COR	<input type="checkbox"/>	New	Rejected
ITIOP,ADA,EV18003,2	ADA	EV1800	<input type="checkbox"/>	Modification	Rejected
RE,ADA,602480M0621,2	ADA	602480	<input type="checkbox"/>	Cancellation	Rejected
ITIOP,ADA,PS180001-5,2	ADA	PS1800	<input type="checkbox"/>	Modification	Rejected
ITA,ADA,AD080D210100,2	ADA	AD080D	<input type="checkbox"/>	Modification	Held
ITA,ADA,AD080M210601,2	ADA	AD080M	<input type="checkbox"/>	Modification	Held
ITIOP,ADA,220000000268,1	ADA	220000	<input checked="" type="checkbox"/>	New	Held

1 Reset OK

8. Notice that the report results are now limited to only show ITA transactions in Draft phase.



Doc Code	Doc Dept	Doc ID	Doc Version	Doc Function	Doc Status	Doc Hdr Actual Amt	Doc Hdr Closed Amt	Doc Hdr Creation User ID	Doc Hdr Creation Date	Doc Hdr Document Description	Doc Phase Code	Doc Unit Code	Trans. Vend Vendor Code
ITA,ADA,AD080D210100,2	ADA	AD080D210100	2	Modification	Held	7,435.60	0.00	198684	09/13/2021	ADDA Asset Billing for the	Draft		
ITA,ADA,AD080M210601,2	ADA	AD080M210601	2	Modification	Held	1,117.46	0.00	198684	09/13/2021	ADDA MAILROOM BILLING	Draft		
ITA,ADA,220000000414,1	ADA	220000000414	1	New	Held	0.00	0.00	1030836	09/29/2021		Draft		
ITA,ADA,230000000005,1	ADA	230000000005	1	New	Held	0.00	0.00	185984	07/05/2022		Draft		
ITA,ADA,230000000093,1	ADA	230000000093	1	New	Rejected	3,140,713.71	0.00	177624	07/26/2022	ADDA HI - JUL 2022	Draft		

Doc Code

ITA,ADA,AD080D210100,2

ITA,ADA,AD080M210601,2

ITA,ADA,220000000414,1

ITA,ADA,230000000005,1

ITA,ADA,230000000093,1

Doc Phase Code

Draft

Draft

Draft

Draft

Draft

9. The filtered report results can now be exported if desired.

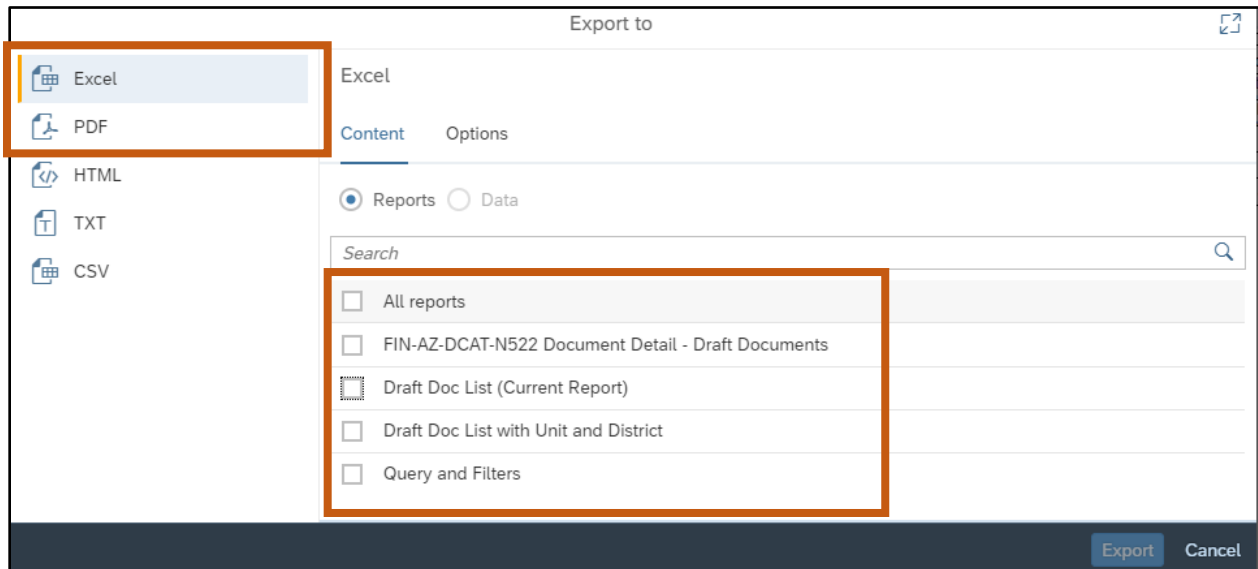
Exporting and Printing the Report

Exporting

Users have the choice of exporting a report as an Excel spreadsheet or a PDF static document.


When exporting, users have several options available dependent on the specific report's input controls. For the **FIN-AZ-DCAT-N522** report, the following export options are available:

- FIN-AZ-DCAT-N522 Document Detail – Draft Documents
 - Exports some report columns along with the report cover page.
- Draft Doc List (Current Report)
 - Exports only data that has been filtered after the report has been run. In the previous scenario, the results were limited to ITA transactions in Draft phase.
- Draft Doc List with Unit and District
 - Exports all data from the Draft Doc List with Unit and District report column.
- Query and Filters
 - Exports explanations from the report developer on the queries and filters used to create the report.



Users can select multiple options if required and the different exports will appear as separate tabs in the same Excel spreadsheet.





- All reports
- FIN-AZ-DCAT-N522 Document Detail - Draft Documents
- Draft Doc List (Current Report)
- Draft Doc List with Unit and District
- Query and Filters

Export Cancel

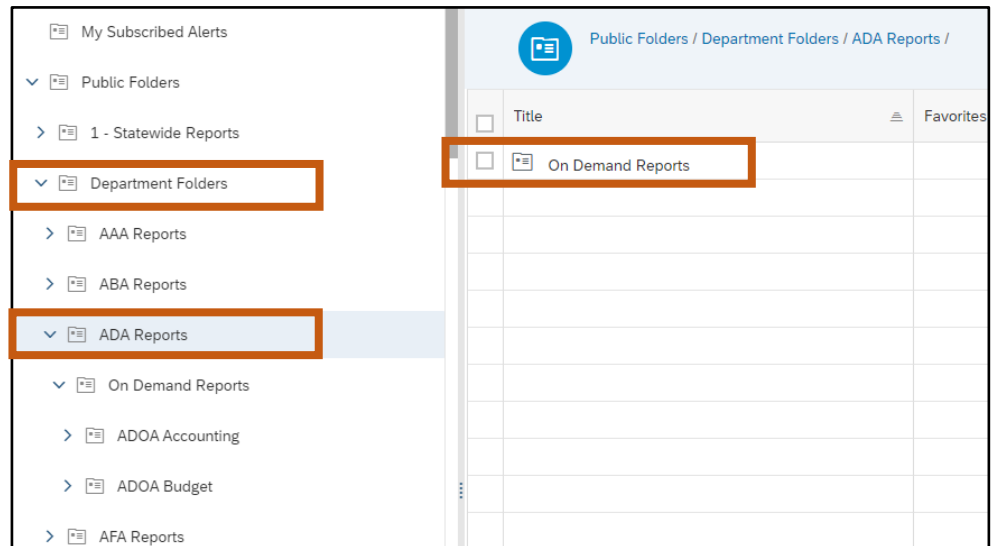
Printing

Reports are exported from infoAdvantage first in order to print. They should not be printed directly from infoAdvantage.

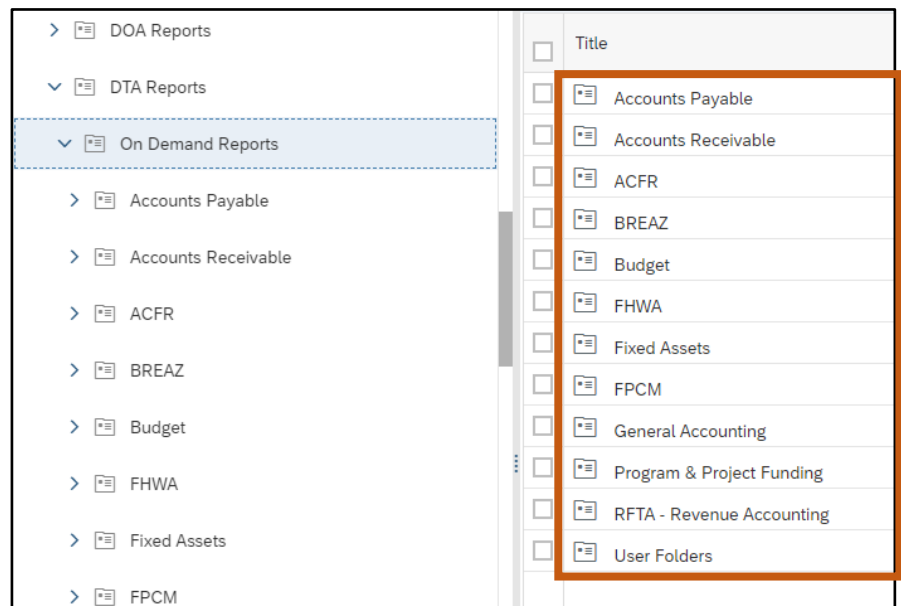
More InfoAdvantage Skills

Managing Folders

This manual previously discussed the 1 - Statewide Reports and Department folders. Each agency has its own On Demand Reports folder, available by selecting Department Folders, the desired department's folder and then clicking On Demand Reports.



The On Demand Reports folder is further broken down by agency functional area.

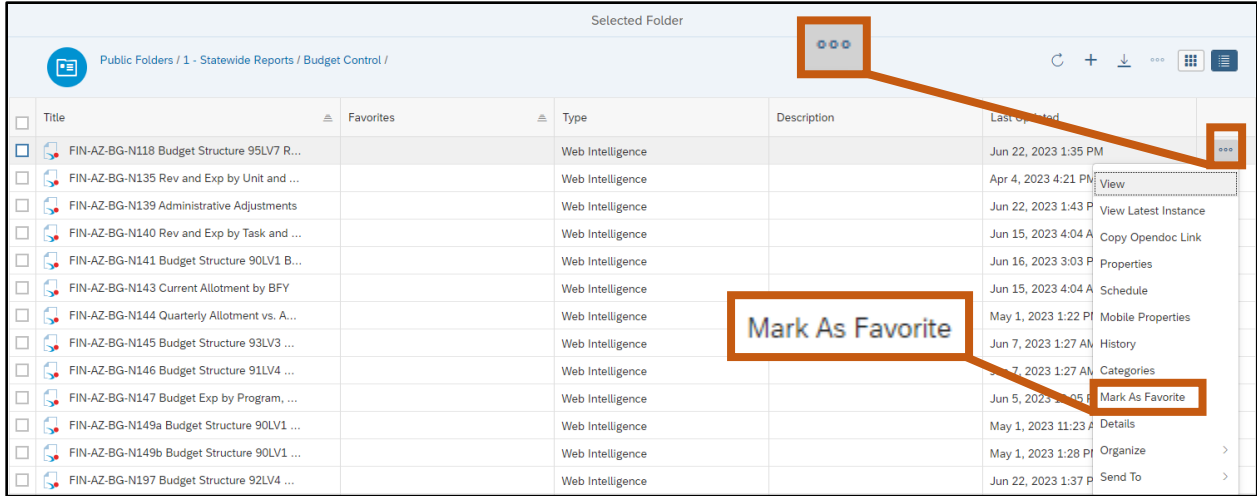


Saving and Retrieving Reports

Users can organize frequently used reports by adding favorites.

To save a report as a Favorite:

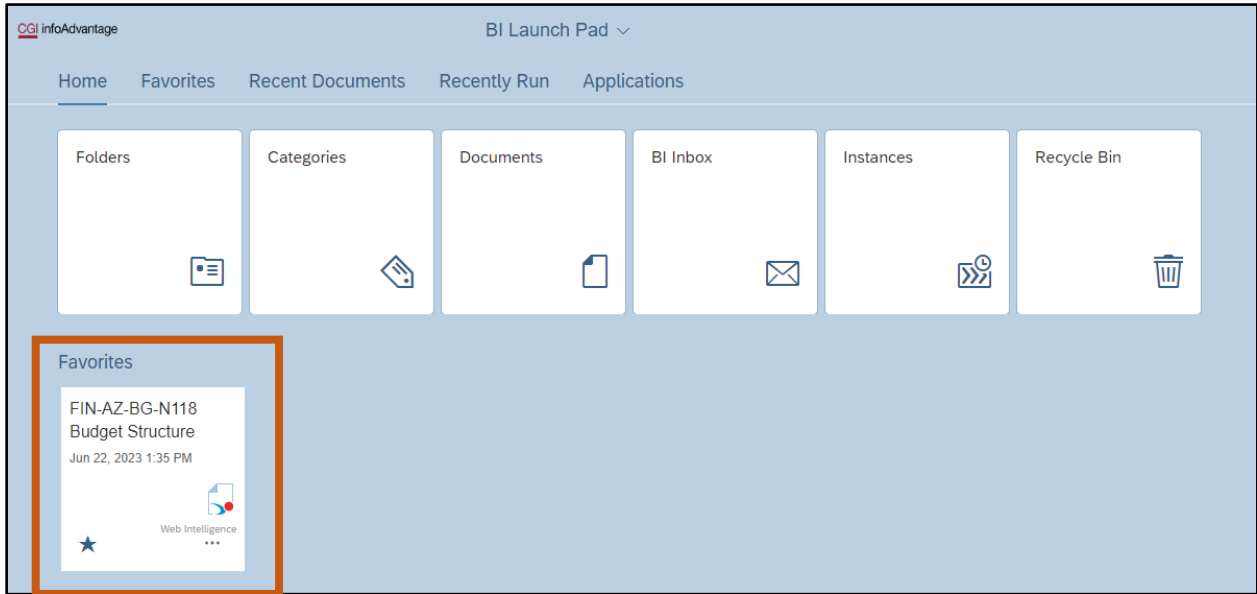
1. Complete the steps from the “Locate a Statewide Report in infoAdvantage” scenario to generate the desired report in the Selected Folder grid.
2. Click the **3-dot** menu that corresponds to the report and select **Mark as Favorite**.



3. Once complete, the report will have a blue star added to the corresponding Favorites column denoting its updated status.



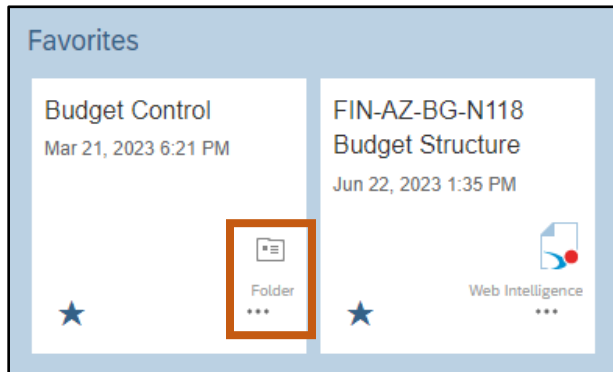
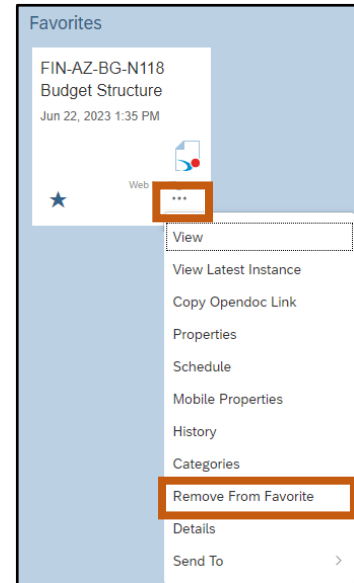
4. In addition, when the user navigates back to their homepage, the report will also be listed under the Favorites folder section.



5. To open a report in favorites, click on the report.
6. To remove the Favorites feature, click the **3-dot** menu on the reports folder and select **Remove from Favorite**.

Any reports in the Recent Documents or Recently Run sections of the user’s homepage can also be added/removed from Favorites by clicking the report folder 3-dot menu.

A report folder can also be added/removed from Favorites by following the same steps.



Troubleshooting Report Issues

There are times when reports either do not generate or do not return the expected results. Common issues and potential solutions are listed in the table below.

Table 3: Common Report Issues

Possible Issue Cause	Possible Solution
Report prompt window run button is grayed out	Ensure that all required prompts have been entered. Reminder: The Run button on the Prompt screen will light up blue when all required prompts have been entered.
Report does not generate	Ensure that all entered prompts are accurate. Too much data was returned and the report erred as a result. Consider utilizing more report prompts to minimize results.
Report returned too much information	Consider utilizing more report prompts to minimize results. Limit the data!
Report does not return the expected data	Ensure that all entered prompts are accurate. Consult agency financial team to ensure report prompts are entered in such a way to align with how agency data is entered into AZ360.



When a Custom Report is Needed

Custom reports may be developed by submitting a Change Request to the GAO Reporting Team. Only certain individuals within an agency can submit a Change Request.

When deciding if a Change Request is needed, first:

- Use the infoAdvantage Reports Dictionary to ensure that no current report is available.
- Ask colleagues about what they are doing to retrieve the data, and/or for tips and tricks.
- If the needed report does not exist, find one that is as similar as possible to provide as a starting point for the GAO Reporting Team.
- Contact the agency's Agency Coordinator for next steps. The Agency Coordinator will decide the best course of action.