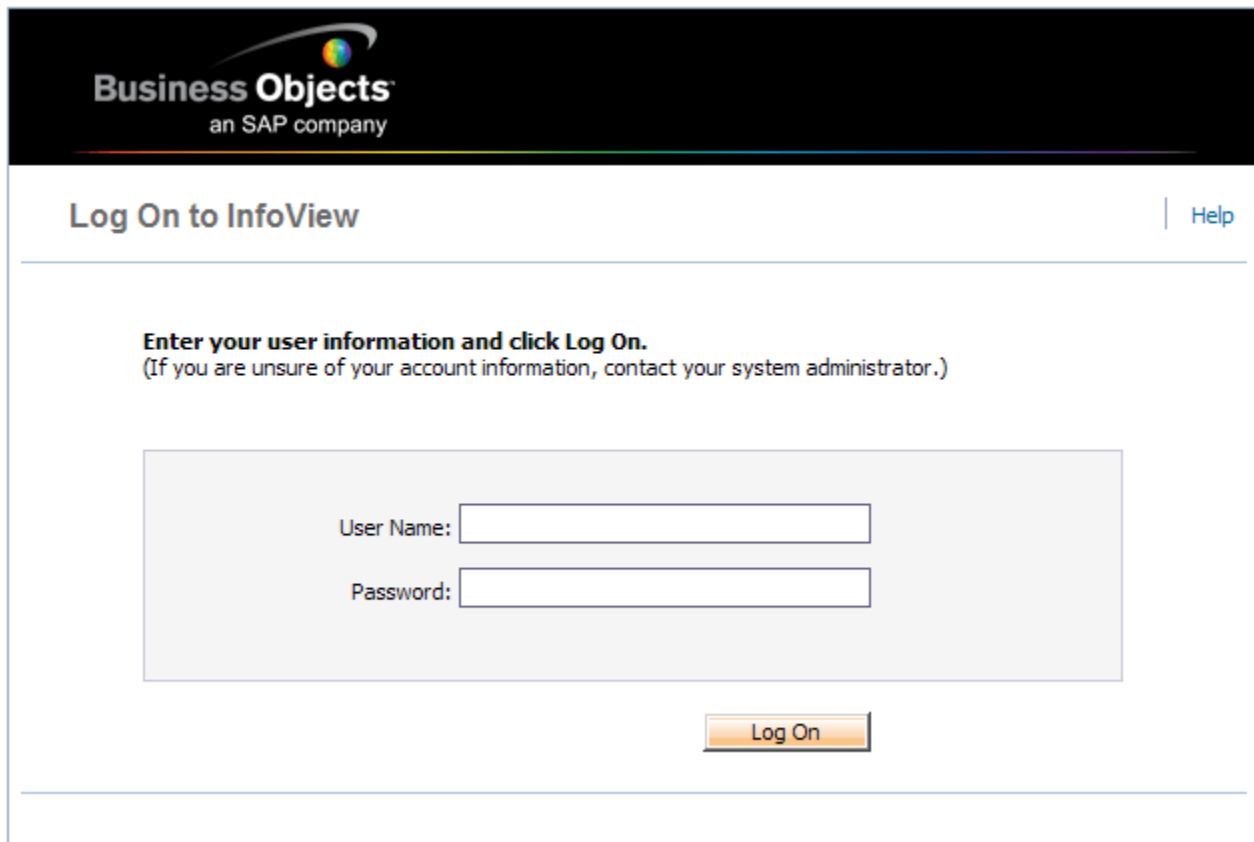


Using BO XI r3 – the new InfoView

Click on: <http://infoview/>

Add to Favorites.

The screenshot shows the 'Log On to InfoView' page. At the top is the Business Objects logo with the tagline 'an SAP company'. Below this is a header bar with 'Log On to InfoView' on the left and a 'Help' link on the right. The main content area contains the instruction 'Enter your user information and click Log On.' followed by a note in parentheses: '(If you are unsure of your account information, contact your system administrator.)'. Below this is a light gray box containing two input fields: 'User Name:' and 'Password:'. At the bottom center of the page is an orange 'Log On' button.

Sign on using your regular userId and your InfoView password. If you have any trouble with your password, contact your InfoView administrator for help getting it reset: for Hr, contact Kiran Shet (ums1), for Finance, contact Cindy Slade (cms1) and for PB, contact Mark Medwid (mamx).

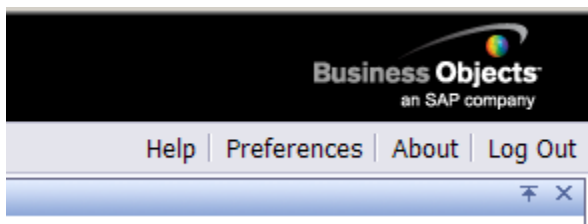
First thing to do after logging on is to change Preferences – for that, either click on the Preferences icon on the right column, middle of the screen:

Personalize

Change your InfoView start page, viewing options, and preferences for daily tasks.



or on the Preferences menu item on the right side at the top of the screen:



For the Start Page, “Home” will be best for most people:

General

InfoView Start Page:

- ☒ Home
 - ☐ My InfoView
 - ☐ Favorites
 - ☐ Inbox
 - ☐ Folder: (unspecified)
 - ☐ Category: (unspecified)
-

Keep Category view unless you mostly use Inbox:

Document Navigation View:

- ☐ Folder
- ☒ Category

Change the number of objects from 10 to 100. Do this by typing the number “100” in the box, then use the <Tab> key to move off the box (if you simply hit <Enter> the change won’t take and the number will revert back to “10”)

Set the number of objects (max.) per page:

Uncheck all the boxes in Document Viewing:

Document List Display:

- ☐ description
- ☐ owner
- ☐ date
- ☐ instance count

Keep the rest of the page the same:

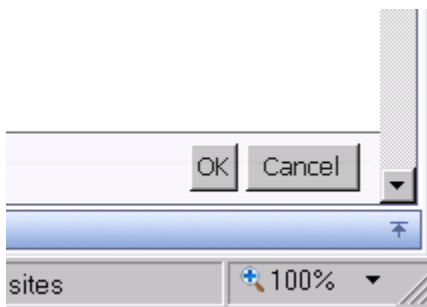
Product Locale:

Current Time Zone:

Preferred Viewing Locale:

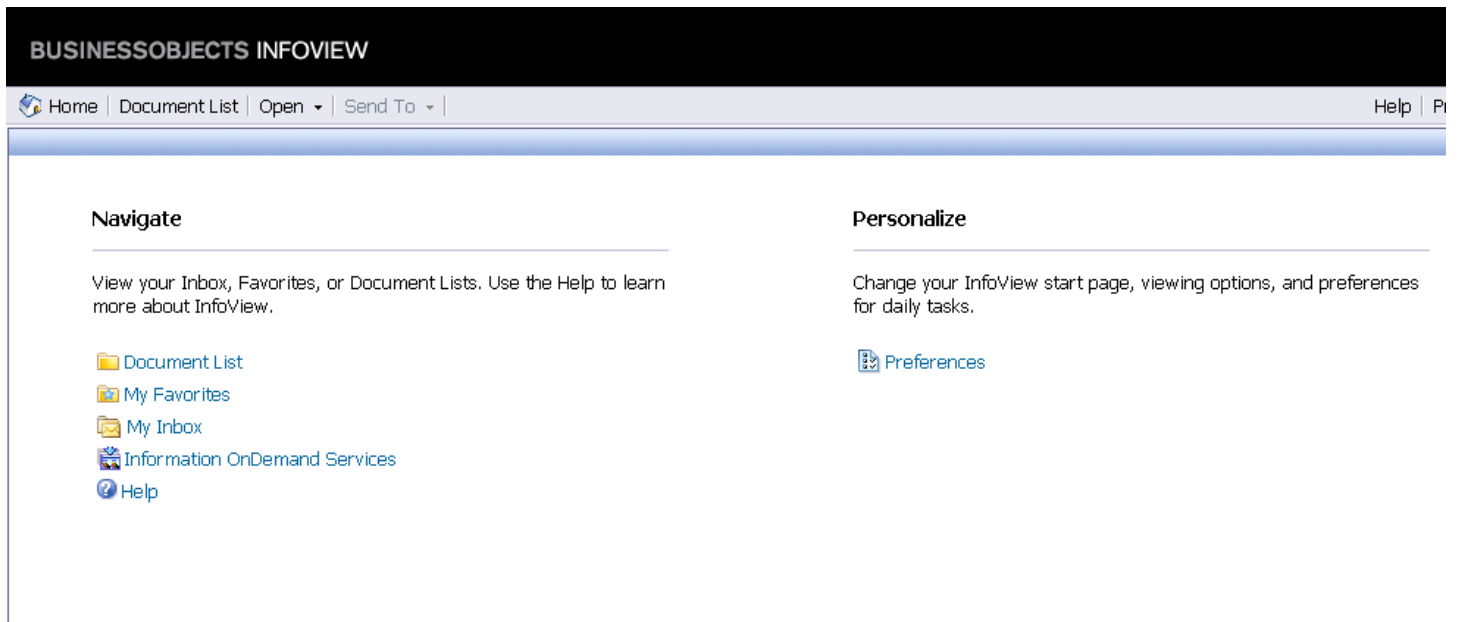
You can change your password on the Preferences page by entering your current password, then what you’d like it to be.


Click “OK” at the bottom right-hand corner of the screen:

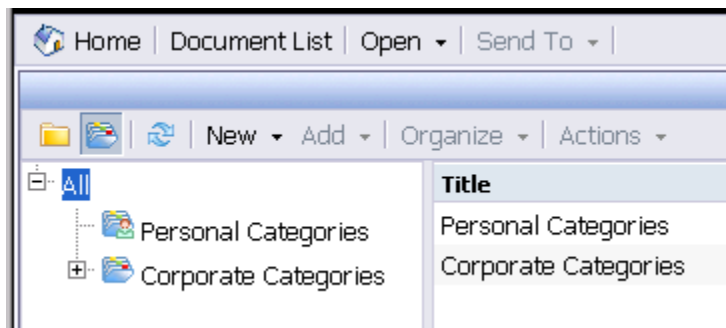




If you get a time-out error, log out and log back in.

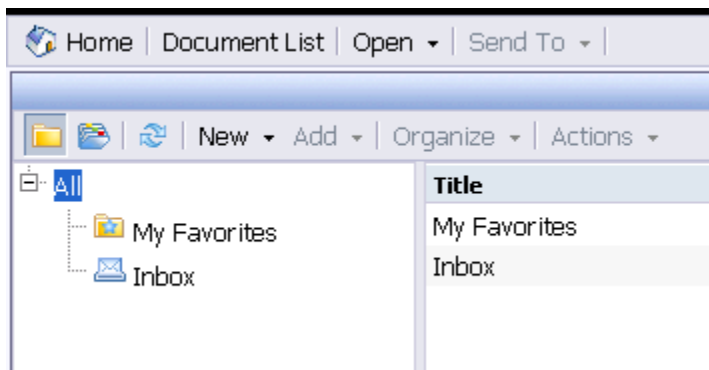
The Home Page looks like this:



As you can see, you can either click on the menu item “Document List” or the link next to the folder icon that says “Document List” (clicking on the  icon itself won’t take you anywhere).



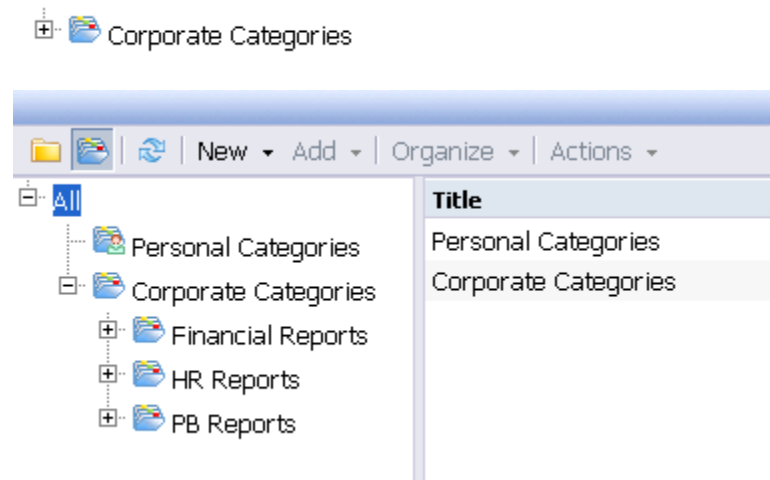
The default view (determined in Preferences) is “Category View” which is the  icon. The Category View is much like the old “Shared Documents” in the old InfoView. The other choice is “Folder View” which is the  icon - that will take you to your Inbox.



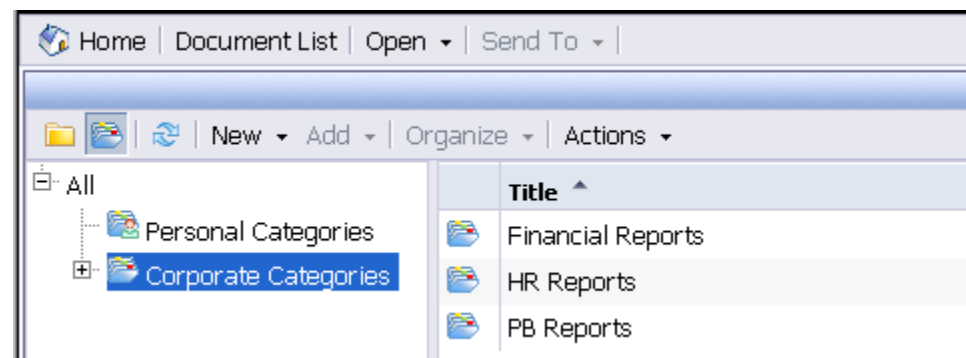
You can toggle between the two views by clicking on the icons.

Category View

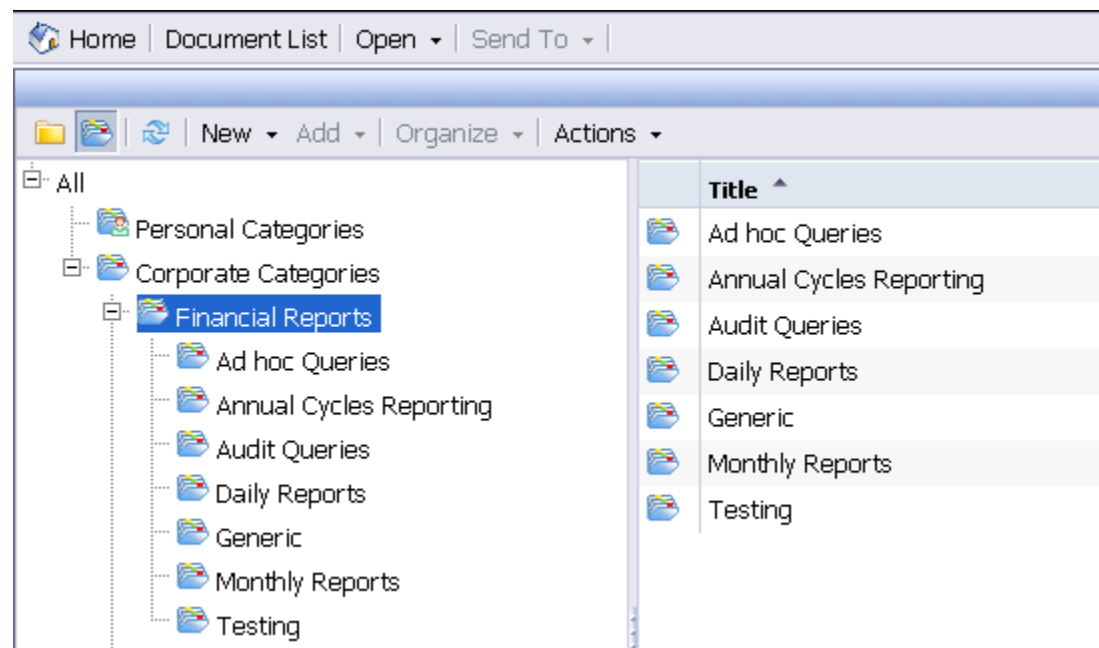
To expand the view, either click on the “+” sign next to Corporate Categories on the left navigation pane



Or double-click “Corporate Categories” on the right side:

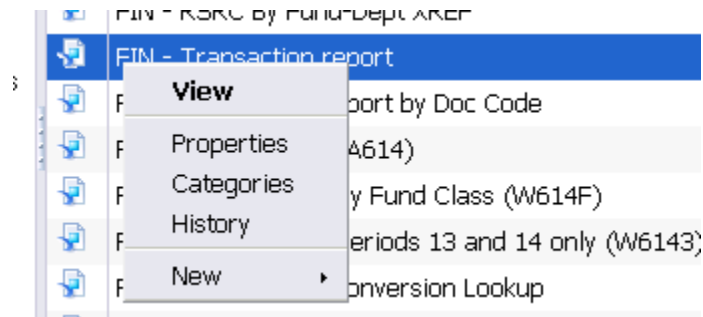


You should see your familiar categories, but as in the old InfoView, not everyone will see every category or every report.





To Run a Report

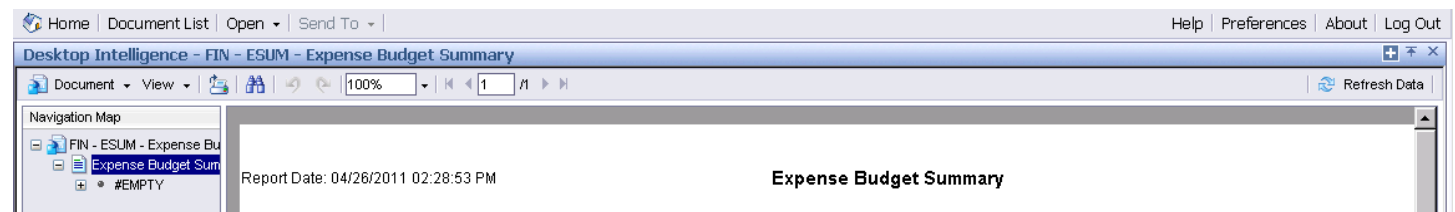
To run a report, right-click and select “View”



This should bring you to an empty report (except in PB – you get an old report). In the lower left corner there are


two view formats (and a search). To toggle between them , click on the appropriate icon.

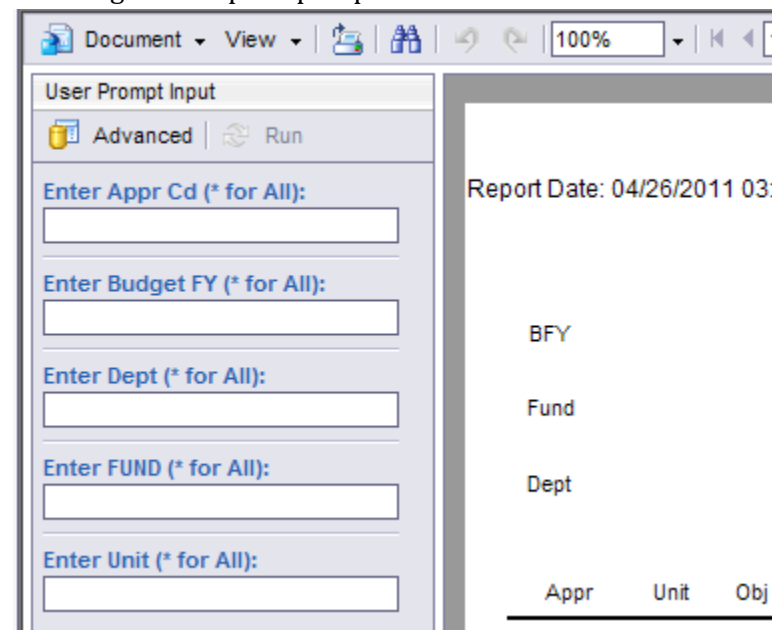
 will get you the “navigation map” (more useful when the report is already run):



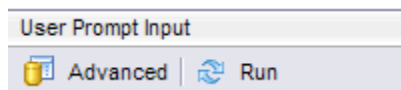
But you can run the report from here by clicking on the “Refresh Data” button on the upper right hand menu bar.



 will get “user prompt input”:



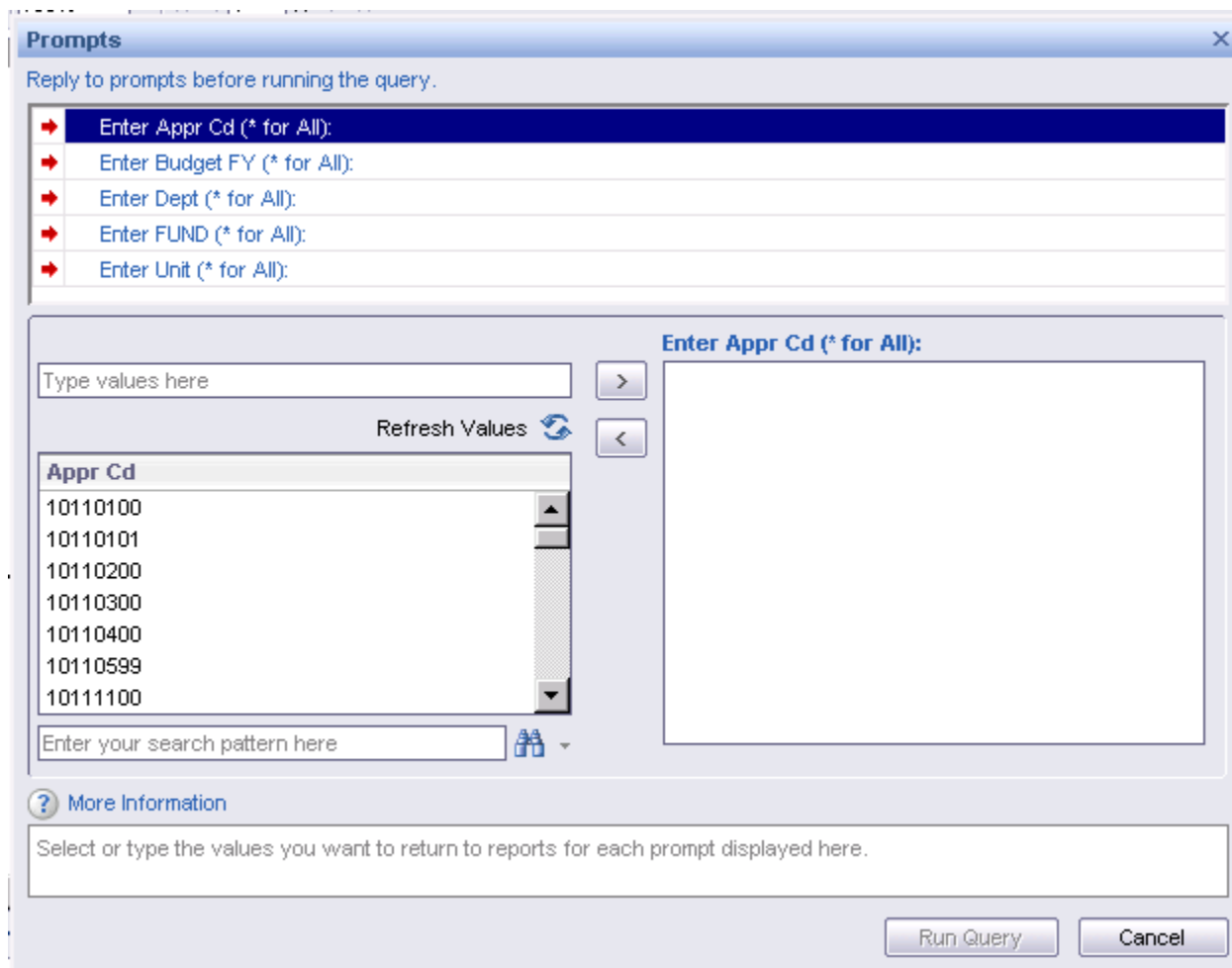
If you know what you want, just type in the values. The <tab> key will navigate from value to value. When they are all typed in, the Run button will be ungrayed (if it is not, simply <shift><tab> or click somewhere on the page):



User Prompt Input

Advanced Run

If you want a list of values, choose the Advanced button and a Prompt Window will pop up:



Prompts

Reply to prompts before running the query.

- Enter Appr Cd (* for All):
- Enter Budget FY (* for All):
- Enter Dept (* for All):
- Enter FUND (* for All):
- Enter Unit (* for All):

Type values here

Refresh Values

Appr Cd

10110100
10110101
10110200
10110300
10110400
10110599
10111100

Enter your search pattern here

Enter Appr Cd (* for All):

More Information

Select or type the values you want to return to reports for each prompt displayed here.

Run Query Cancel

The red arrows to the left let you know that the prompts have not been chosen. Some reports will have Defaults pre-chosen that you can override.

In this example, for the Appr Cd, you can either type the value in the box that says “Type values here” (then click on the right arrow to transfer it to the chosen box (if you hover over the left arrow, the help info says, “Add from List of Values or textbox”. You can also add values from the list, holding the <Shift> key for contiguous values or the <Ctrl> key for distinct values

1010101

Refresh Values

Appr Cd

10110100
10110101
10110200
10110300
10110400
10110599
10111100

Enter your search pattern here

If you make a mistake, high light the one(s) you want removed and click on the left arrow

Enter Appr Cd (* for All):

> 1010101

< 10110400

< 10111100

To narrow your choices, use the search box below (* for wild card):

Refresh Values

Appr Cd

10116599
10126599
10136599
10146599

659

As you make your choices, they will be reflected on top with a green check mark:

Reply to prompts before running the query.

✓ Enter Appr Cd (* for All): **10110400;10111100;10146599**

➔ Enter Budget FY (* for All):

➔ Enter Dept (* for All):

➔ Enter FUND (* for All):

➔ Enter Unit (* for All):

Enter Appr Cd

> 10110400

< 10111100

< 10146599

Refresh Values

Sometimes the list will be so long, it will be divided into ranges to save space:

✓ Enter Unit (* for All): *

0001...364A

0001...364A
364B...718I
718J...999J

When all the check marks are green and you have the values you want, click on the “Run Query” button on the bottom of the Prompt Box:

Prompts [X]

Reply to prompts before running the query.

- ✓ Enter Appr Cd (* for All): **10110400;10111100;10146599**
- ✓ Enter Budget FY (* for All): *
- ✓ Enter Dept (* for All): *
- ✓ Enter FUND (* for All): *
- ✓ Enter Unit (* for All): *

Enter Unit (* for All):

*

Unit Cd

0001
0010
0017
0018
0019
001A
001B

Enter your search pattern here

Currently-selected values in listbox

Run Query Cancel

Report Date: 04/26/2011 02:51:50 PM

BFY 2004

Fund 101

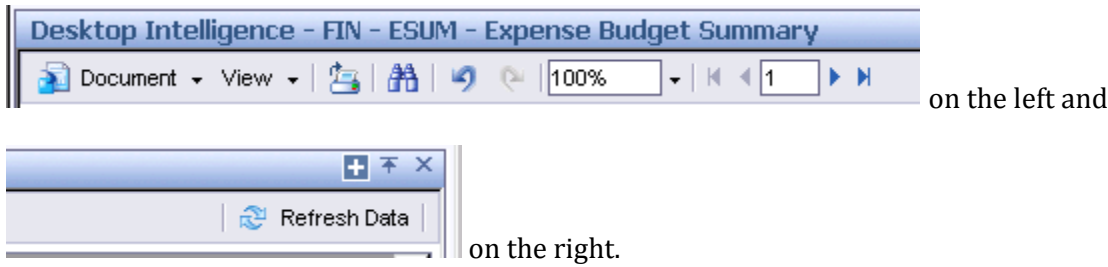
Dept 10

Appr	Unit	Obj	Budget Name	Current Budget	Pre-Enc	Encumbered	Accrued Expense	Cash Exp	UnCommitted	UnObligated
10110400	1000	4070	EQUIPMENT SERVICE	5,000.00	0.00	0.00	0.00	4,472.00	528.00	528.00
10110400	1000	4110	EMPLOYEE TRAVEL EXPEN	30,000.00	0.00	0.00	0.00	29,999.91	0.09	0.09
10110400	1000	4160	TELEPHONE EXPENSES	88,138.00	0.00	0.00	0.00	88,137.60	0.40	0.40
10110400	1000	4360	EDUCATIONAL TRAINING	6,000.00	0.00	0.00	0.00	6,000.00	0.00	0.00
10110400	1000	4380	CONTRACTUAL SERVICES	218,346.00	0.00	0.00	0.00	218,345.58	0.42	0.42
10110400	1000	4440	SPECIAL STUDIES	25,000.00	0.00	0.00	0.00	25,000.00	0.00	0.00
10110400		Sum:		372,484.00	0.00	0.00	0.00	371,955.09	528.91	528.91

At this point, either the navigation map view or the search will let you find parts of your report quickly.

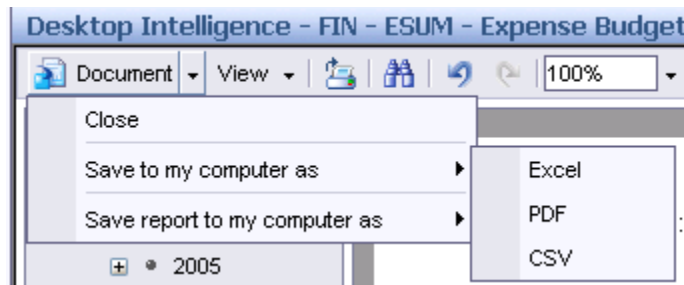
Saving and Printing

After your report is run, a menu appears with several options:

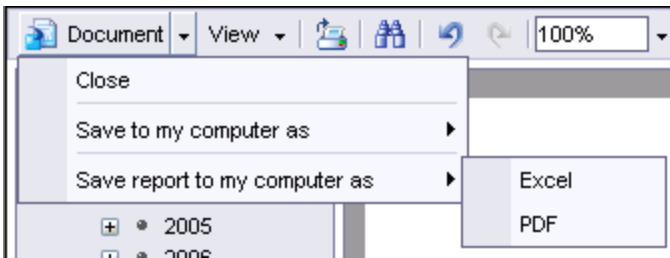


The Document Menu gives you the option of closing or saving the report in different formats:

In the 'Document' drop down list **Do not use 'Save' or 'Save As' option**, this will hang your pc. You **MUST** use "Save to my computer as"; you must not print from this icon either – save it first as a PDF or Excel, then print from that. Or you click on the 'View' tab and select PDF. Once the report re-displays in PDF format you can print it using the Print icon in the PDF header.

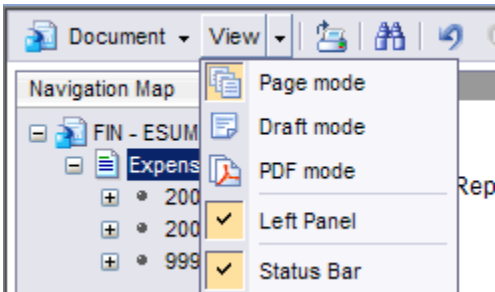


and



There is no difference between the different Excels and PDFs.

The View menu items gives you several choices of formats to view the report without saving it:



Draft Mode (no headings):

BFY 2004						
Fund 101						
Dept 10						
Appr	Unit	Obj	Budget Name	Current Budget	Pre-Enc	Encumbered
10110100	1000	1010	ANNUAL REGULAR SALARIES	2,175,197.00	0.00	0.00
10110100			Sum:	2,175,197.00	0.00	0.00

Page Mode (includes headings):

Report Date: 04/26/2011 03:24:53 PM

Expense Budget Summary

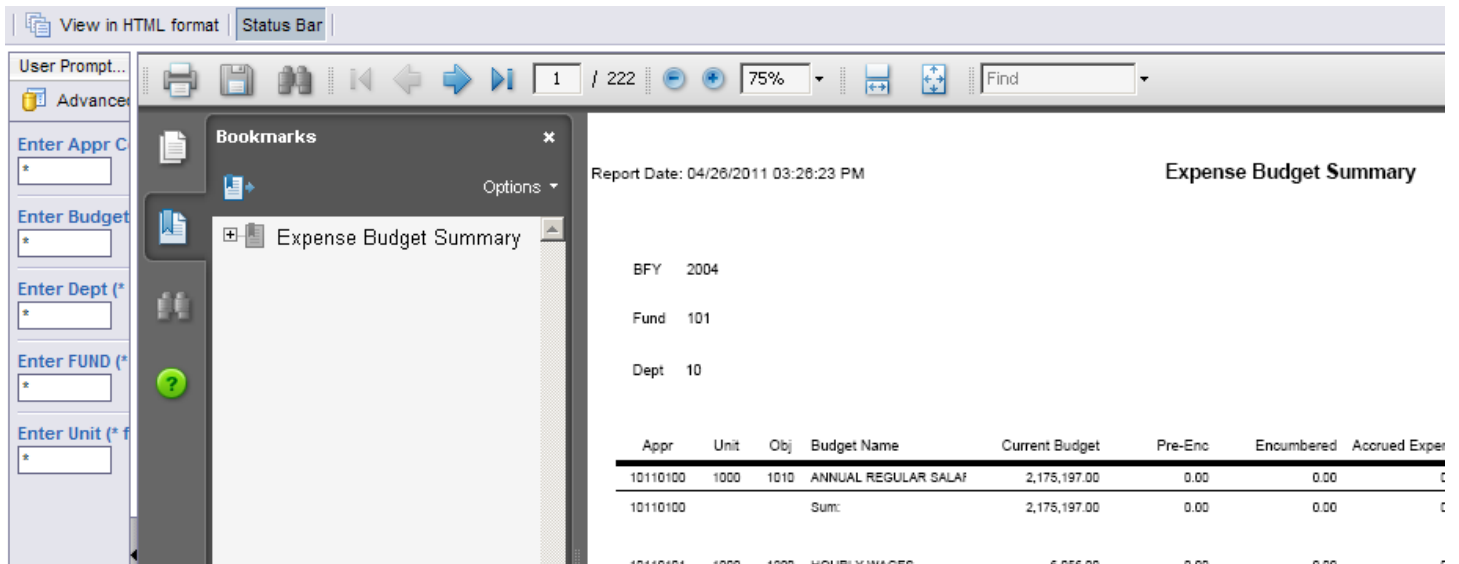
BFY 2004

Fund 101

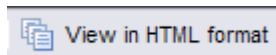
Dept 10

Appr	Unit	Obj	Budget Name	Current Budget	Pre-Enc	Encumbered	Accrued Expense
10110100	1000	1010	ANNUAL REGULAR SALAF	2,175,197.00	0.00	0.00	0.00
10110100			Sum:	2,175,197.00	0.00	0.00	0.00
10110101	1000	1200	HOURLY WAGES	6,056.00	0.00	0.00	0.00
10110101	1000	1370	OFFICERS	145,000.00	0.00	0.00	0.00

PDF Mode:




To toggle back to HTML mode , click on

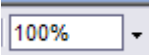


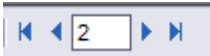
You can toggle the left pane and the status bar on and off

If you are in HTML mode and you click the Print icon , BO will put the report in PDF format which you can either save first or print from directly.


The Search icon  will allow you to find specific values in your report.


The Undo/Redo icons  don't do very much.


The Size box  ranges from 10% to 500% and defaults to 100%.

In HTML mode, only one page at a time may be viewed , but you can go to the first page, previous page, any page number you type in, next page and last page.


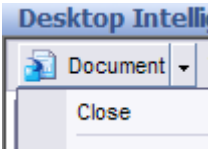
In PDF format, you can choose how you navigate (to add more choices, right click on the menu bar).

Clicking on the Refresh icon  will bring up the Prompt Box (if the report has prompts).

Above the Refresh icon is another menu: 






The  icon will open the report in a new window.

The  and  icons hide and show the menus.

The  icon and the Document Close  both close the current report and takes you back to your Category View.

Inbox

To get to Inbox, either click on the Home button  then on Inbox

-  Document List
-  My Favorites
-  My Inbox
-  Information OnDemand Services
-  Help

Be sure to click on the words "My Inbox" and not the folder icon.

The other way is to click on the Document List button  and then on the Folder icon 

My Favorites is also in the Folder View.