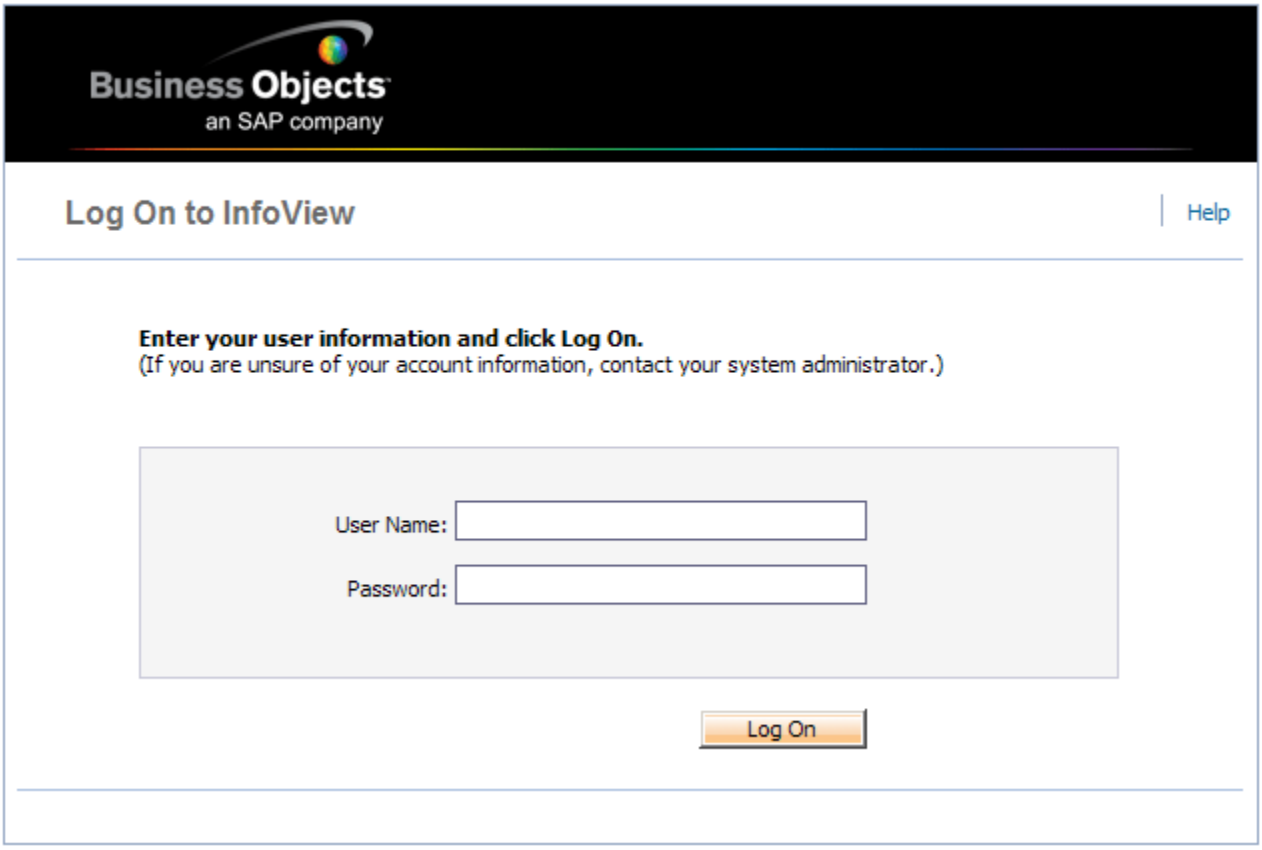
Using BO XI r3 – the new InfoView

Click on: http://infoview/

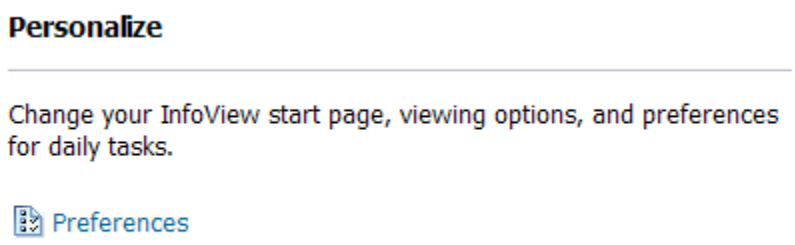
4/26/2011

Add to Favorites.

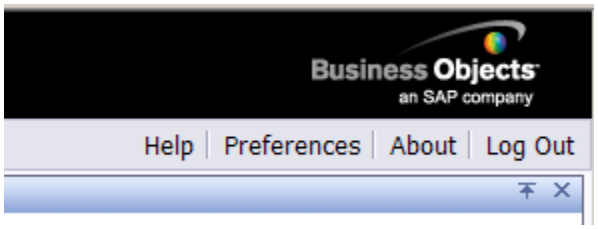


Sign on using your regular userId and your InfoView password. If you have any trouble with your password, contact your InfoView administrator for help getting it reset: for Hr, contact Kiran Shet (ums1), for Finance, contact Cindy Slade (cms1) and for PB, contact Mark Medwid (mamx).

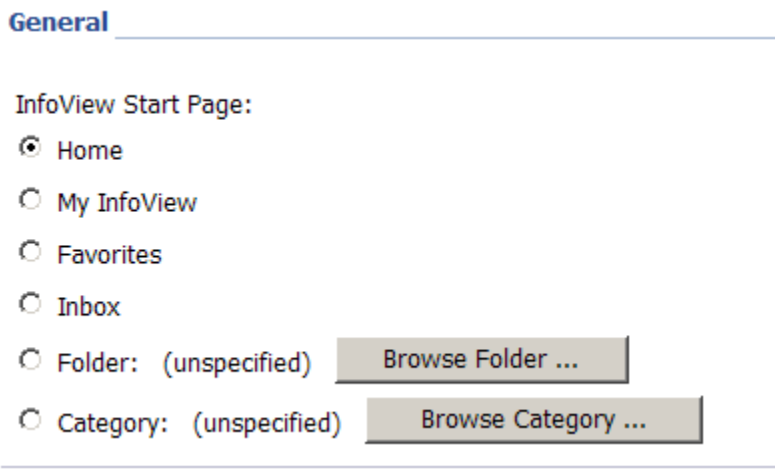
First thing to do after logging on is to change Preferences – for that, either click on the Preferences icon on the right column, middle of the screen:



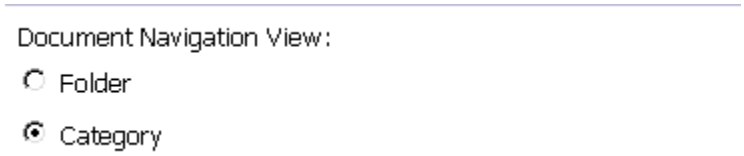
or on the Preferences menu item on the right side at the top of the screen:



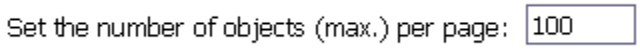
For the Start Page, "Home" will be best for most people:



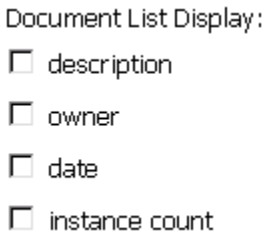
Keep Category view unless you mostly use Inbox:



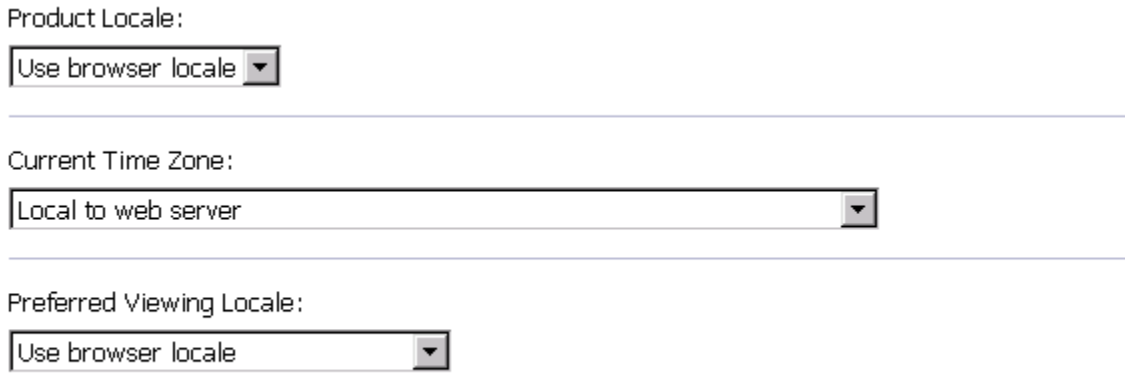
Change the number of objects from 10 to 100. Do this by typing the number “100” in the box, then use the <Tab> key to move off the box (if you simply hit <Enter> the change won’t take and the number will revert back to “10”)



Uncheck all the boxes in Document Viewing:

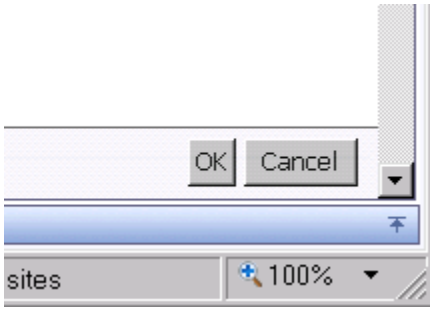


Keep the rest of the page the same:



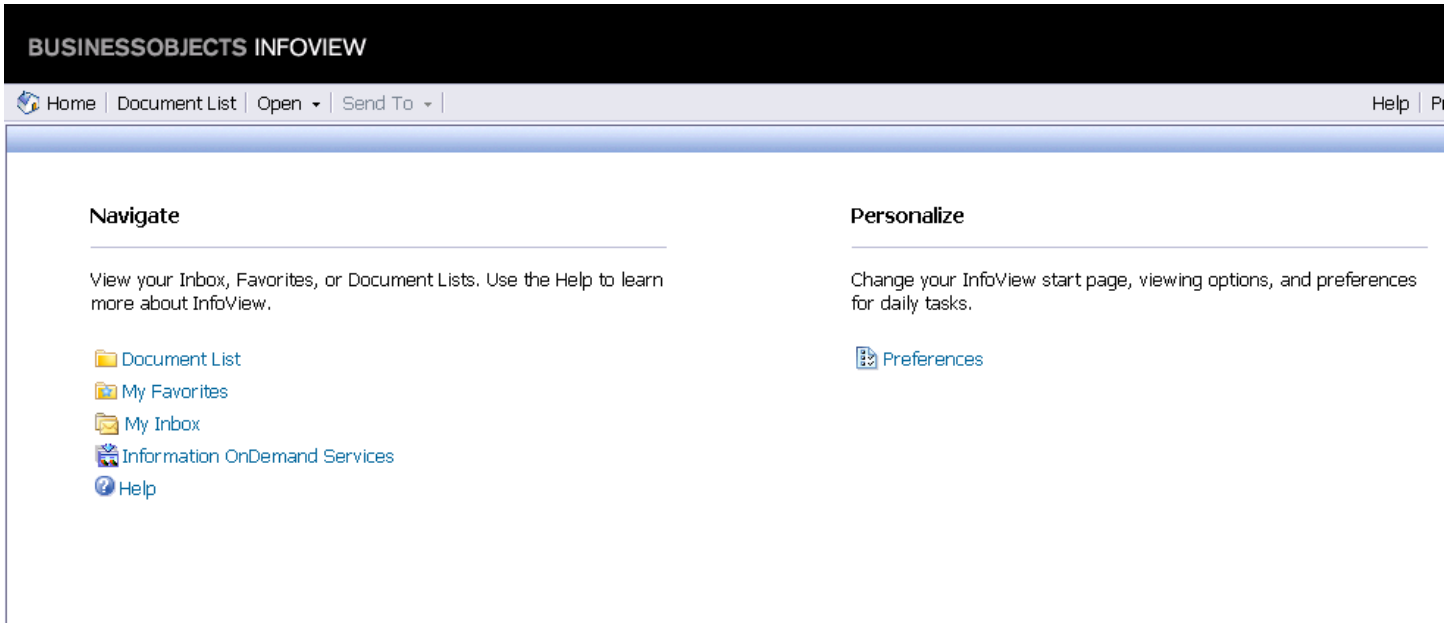
You can change your password on the Preferences page by entering your current password, then what you’d like it to be.

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

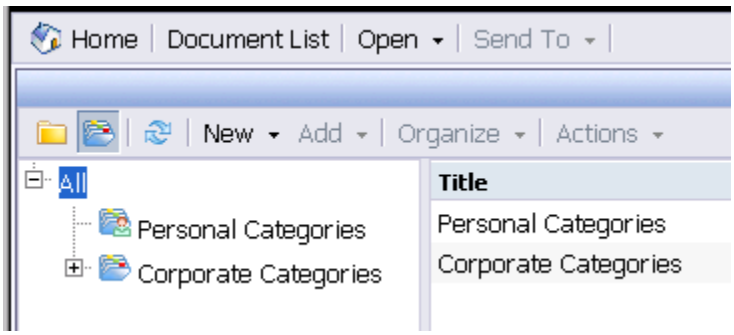


If you get a time-out error, log out and log back in.

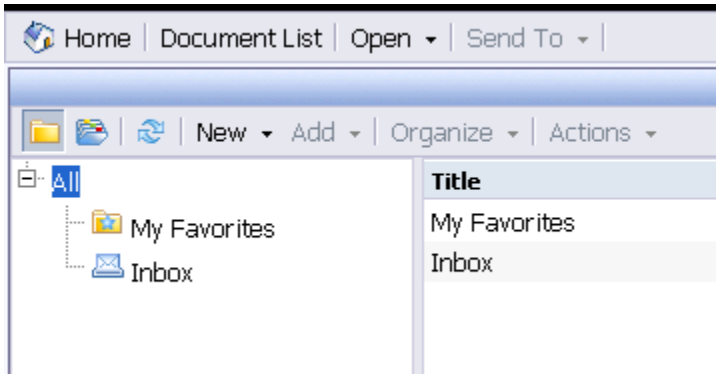
The Home Page looks like this:



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).



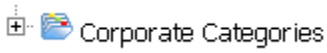
The default view (determined in Preferences) is "Category View" which is the icon. The Category View is much like the old "Shared Documents" in the old InfoView. The other choice is "Folder View" which is the icon - that will take you to your Inbox.

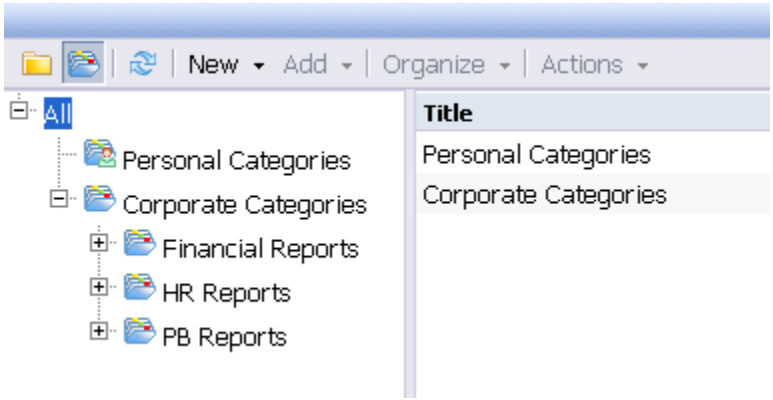


You can toggle between the two views by clicking on the icons.

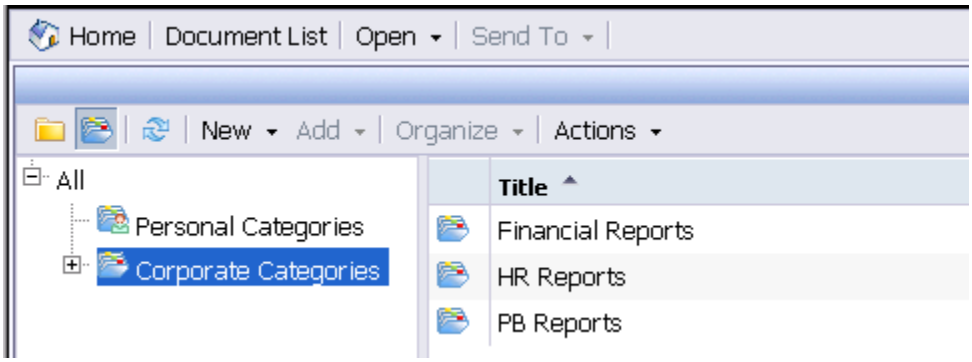
Category View

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

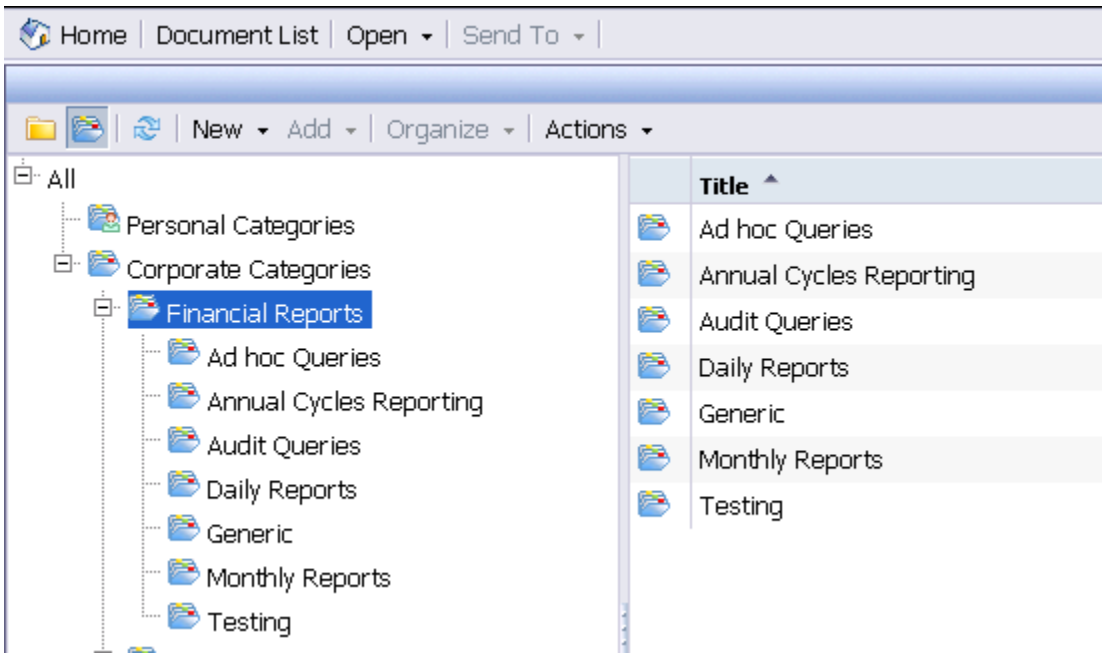




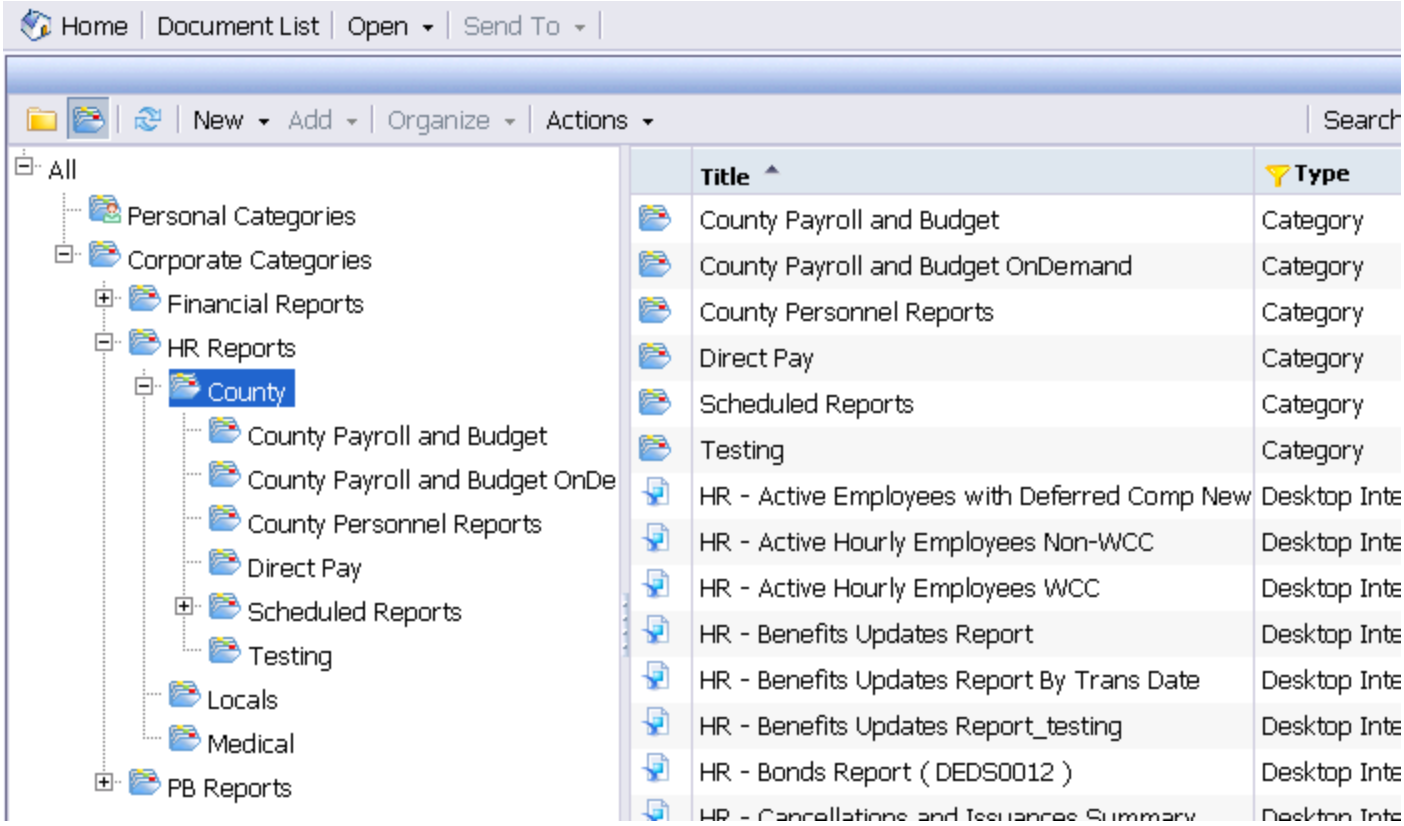
Or double-click "Corporate Categories" on the right side:



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



Finance


Home
Document List
Open
Send To
New
Add
Organize
Actions
Search
All
Personal Categories
Corporate Categories
Financial Reports
HR Reports
County
County Payroll and Budget
County Payroll and Budget OnDe
County Personnel Reports
Direct Pay
Scheduled Reports
Testing
Locals
Medical
PB Reports
Title
Type
County Payroll and Budget
Category
County Payroll and Budget OnDemand
Category
County Personnel Reports
Category
Direct Pay
Category
Scheduled Reports
Category
Testing
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HR - Active Employees with Deferred Comp New
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HR - Active Hourly Employees Non-WCC
Desktop Inte
HR - Active Hourly Employees WCC
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HR - Benefits Updates Report
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HR - Benefits Updates Report By Trans Date
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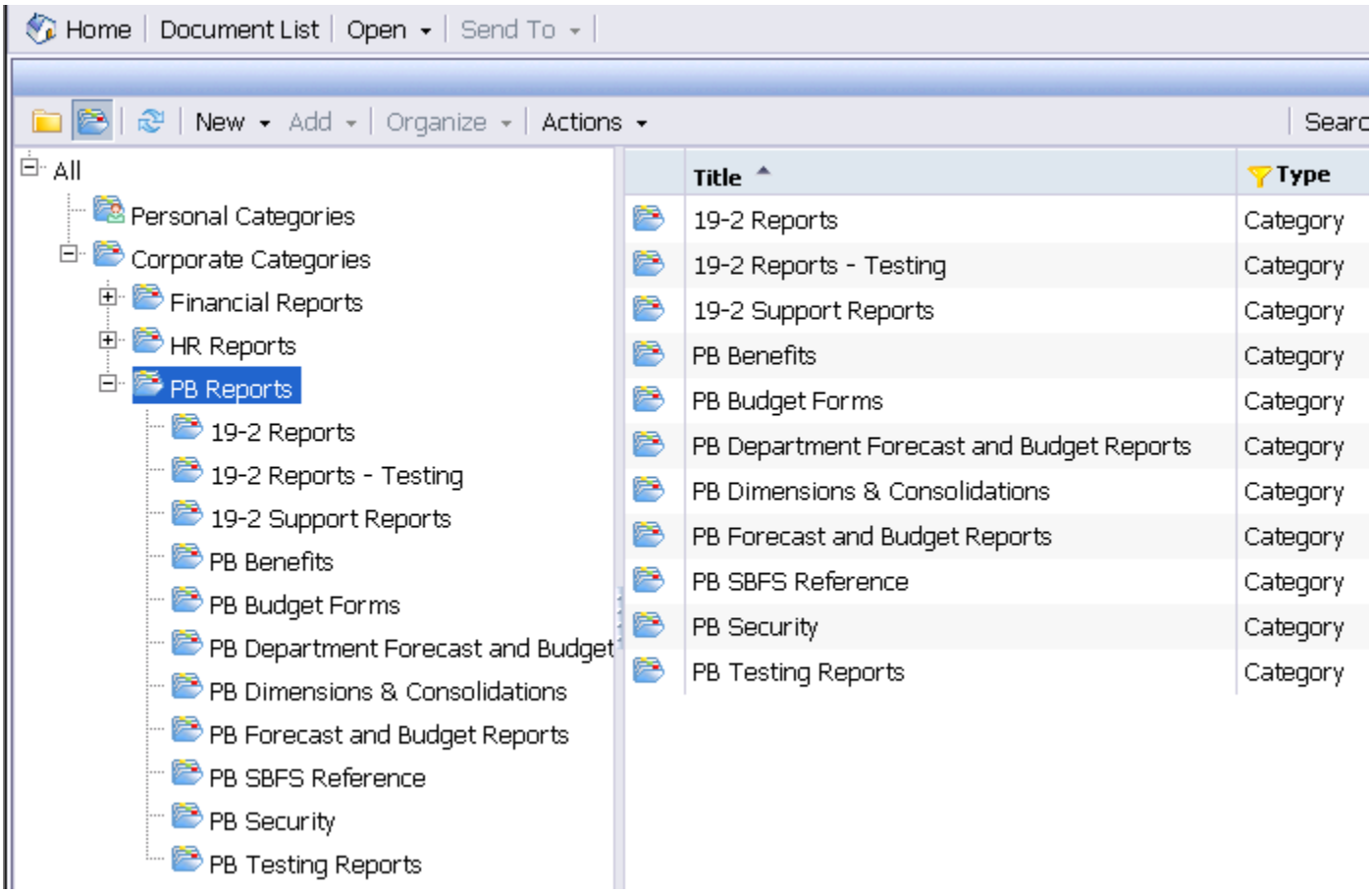
HR - Benefits Updates Report_testing
Desktop Inte
HR - Bonds Report (DEDS0012)
Desktop Inte

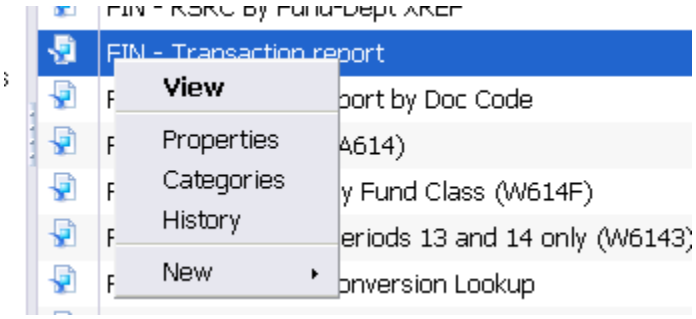
County


Home
Document List
Open
Send To
New
Add
Organize
Actions
Searc
All
Personal Categories
Corporate Categories
Financial Reports
HR Reports
PB Reports
19-2 Reports
19-2 Reports - Testing
19-2 Support Reports
PB Benefits
PB Budget Forms
PB Department Forecast and Budget
PB Dimensions & Consolidations
PB Forecast and Budget Reports
PB SBFS Reference
PB Security
PB Testing Reports
Title
Type
19-2 Reports
Category
19-2 Reports - Testing
Category
19-2 Support Reports
Category
PB Benefits
Category
PB Budget Forms
Category
PB Department Forecast and Budget Reports
Category
PB Dimensions & Consolidations
Category
PB Forecast and Budget Reports
Category
PB SBFS Reference
Category
PB Security
Category
PB Testing Reports
Category

PB

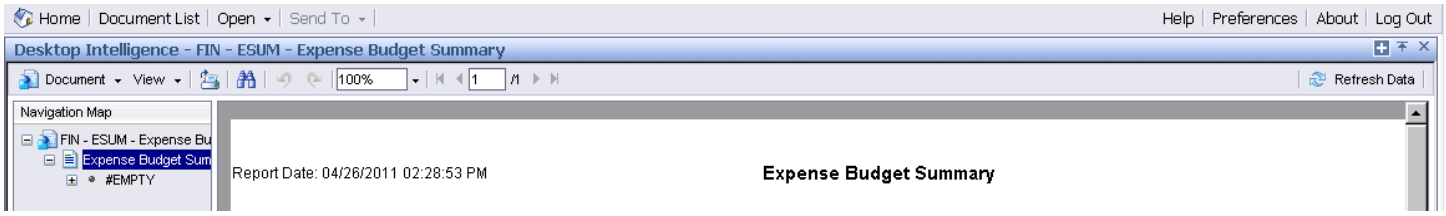
To Run a Report

To run a report, right-click and select "View"

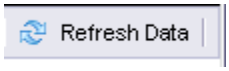


This should bring you to an empty report (except in PB – you get an old report). In the lower left corner there are two view formats (and a search). To toggle between them , click on the appropriate icon.

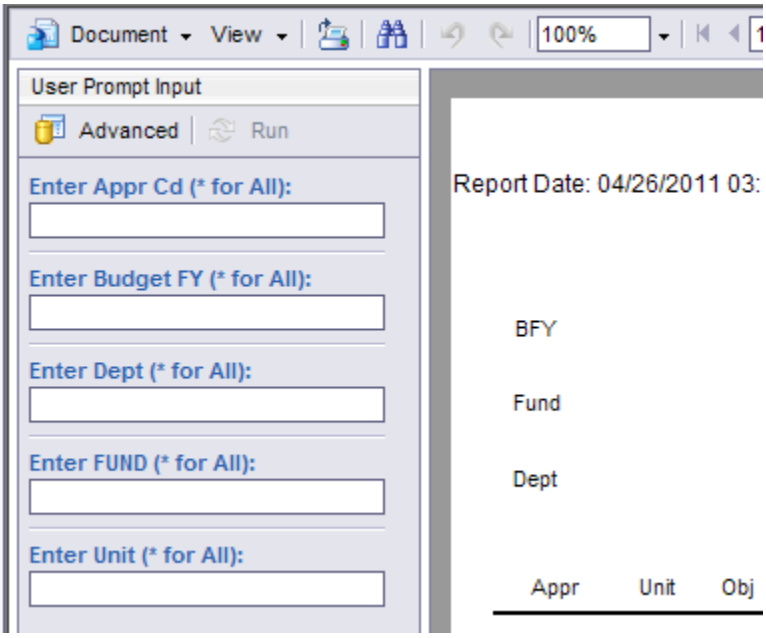
will get you the "navigation map" (more useful when the report is already run):



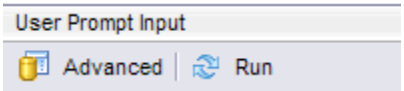
But you can run the report from here by clicking on the "Refresh Data" button on the upper right hand menu bar.



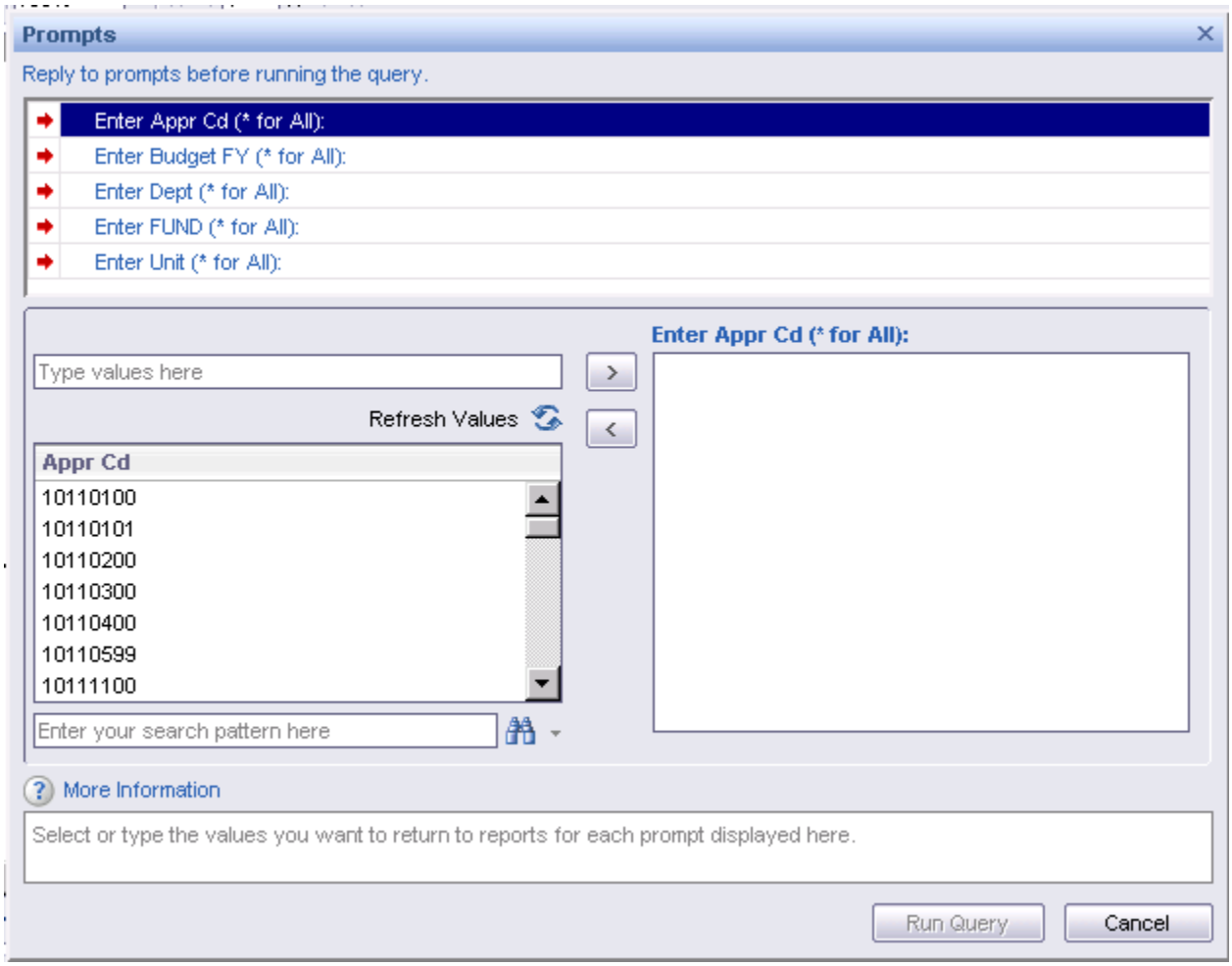
will get "user prompt input":



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):

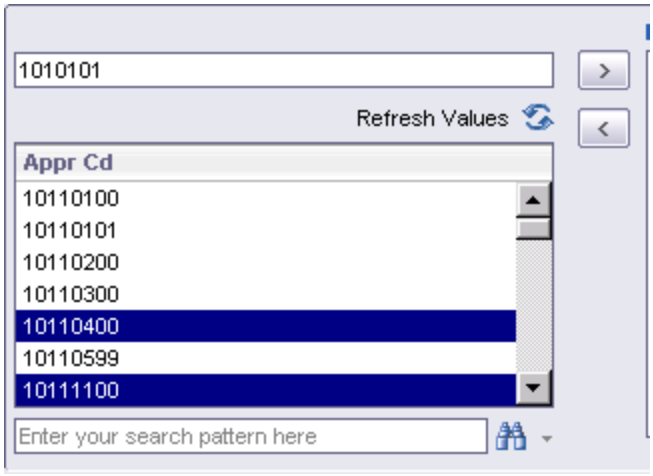


If you want a list of values, choose the Advanced button and a Prompt Window will pop up:

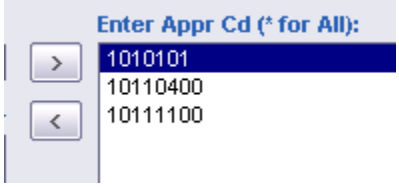


The red arrows to the left let you know that the prompts have not been chosen. Some reports will have Defaults pre-chosen that you can override.

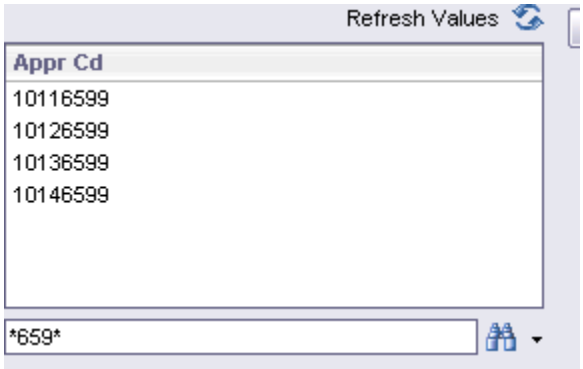
In this example, for the Appr Cd, you can either type the value in the box that says “Type values here” (then click on the right arrow to transfer it to the chosen box (if you hover over the left arrow, the help info says, “Add from List of Values or textbox”. You can also add values from the list, holding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



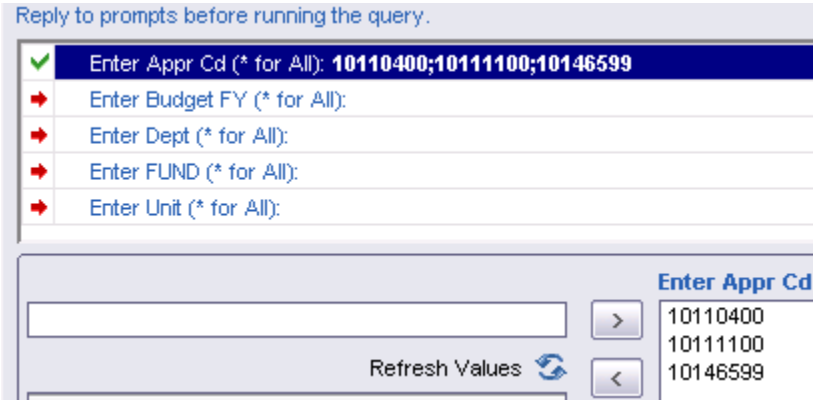
If you make a mistake, high light the one(s) you want removed and click on the left arrow



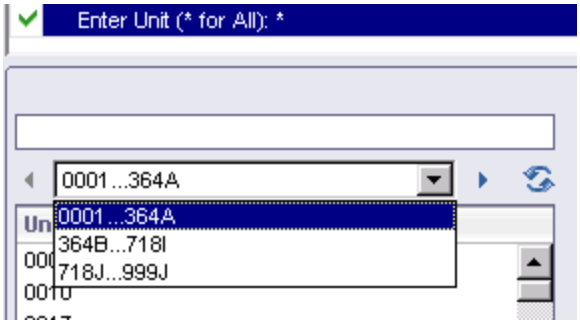
To narrow your choices, use the search box below (* for wild card):



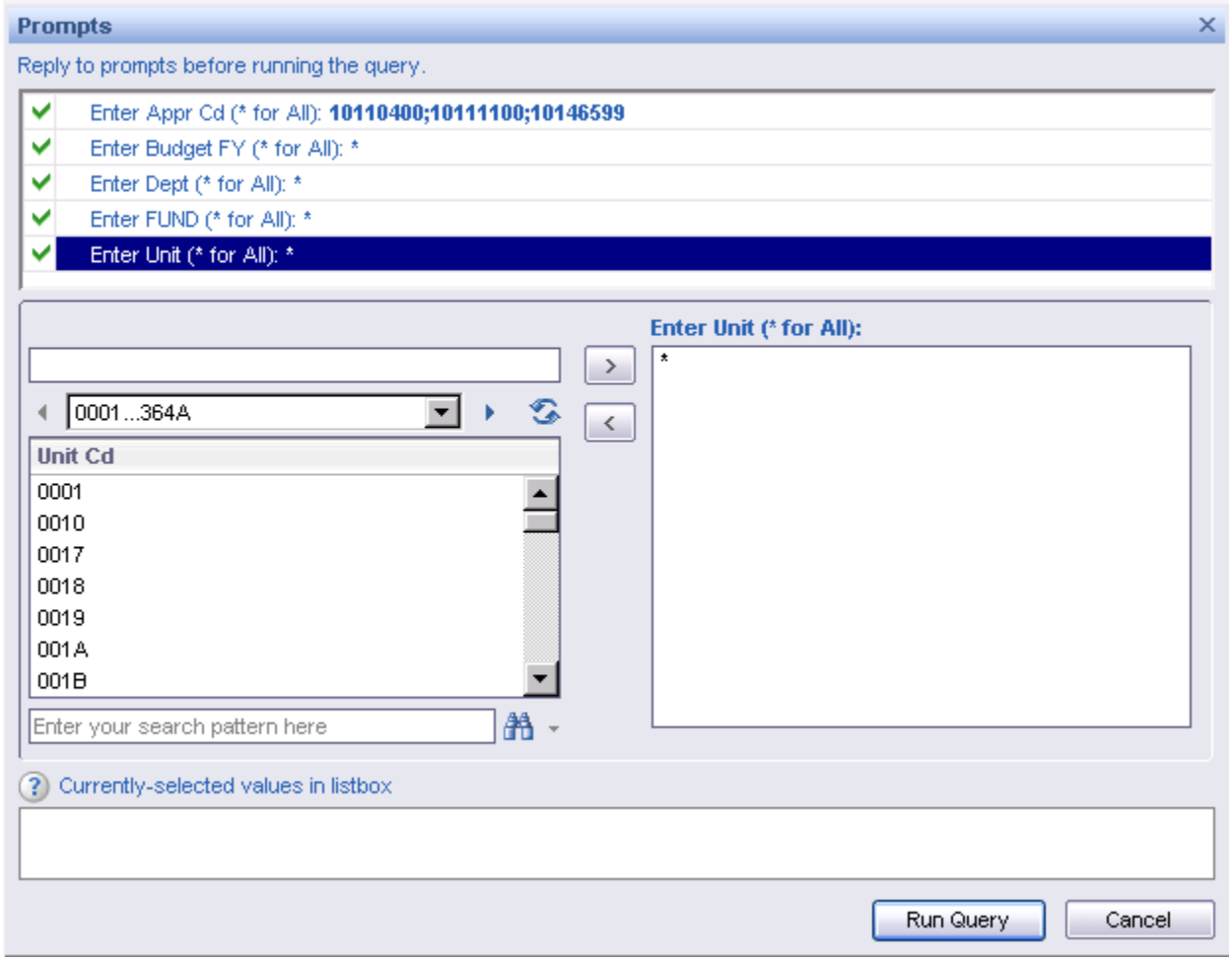
As you make your choices, they will be reflected on top with a green check mark:

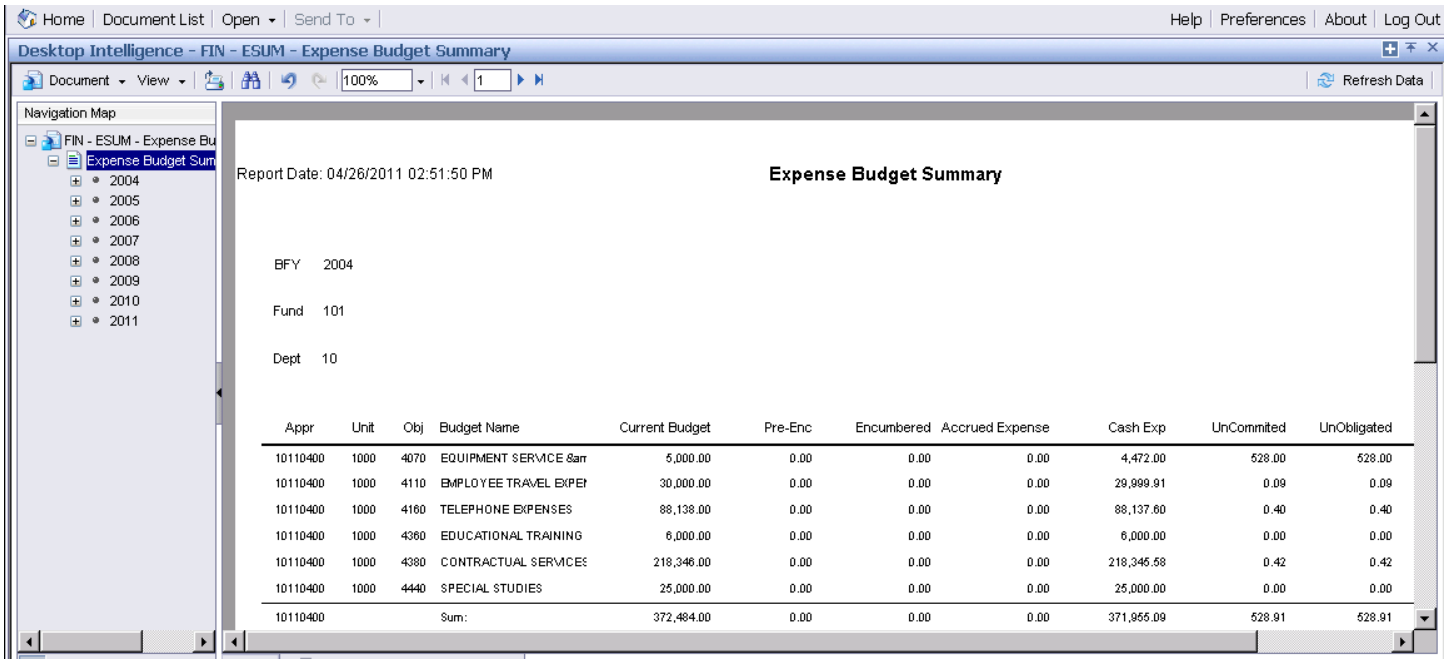


Sometimes the list will be so long, it will be divided into ranges to save space:



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:



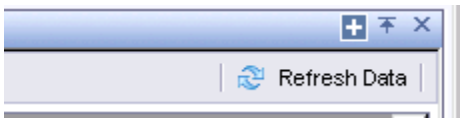


At this point, either the navigation map view or the search will let you find parts of your report quickly.

Saving and Printing

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

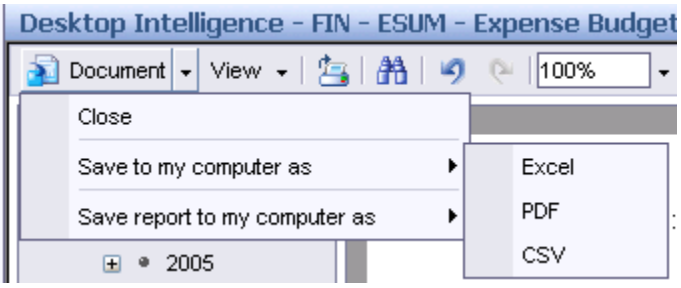
on the left and



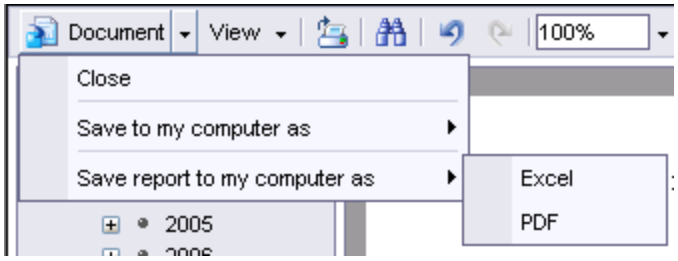
on the right.

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.

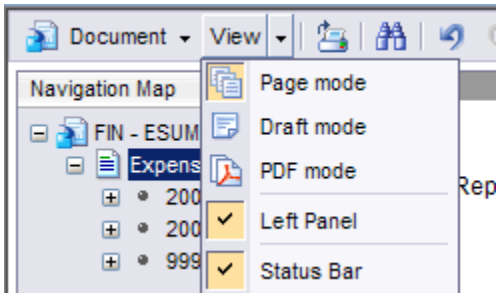


and



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

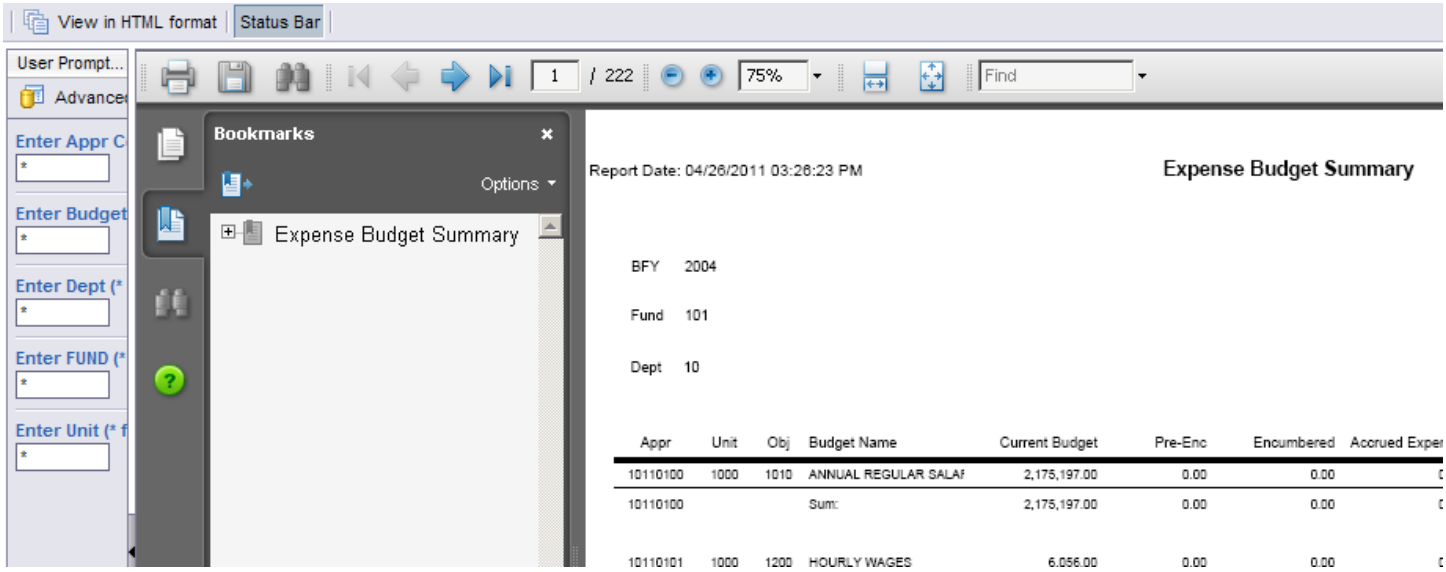
BFY 2004

Fund 101

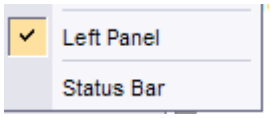
Dept 10

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:



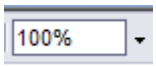
To toggle back to HTML mode , click on

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.

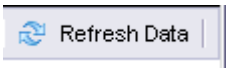
The Size box 

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).

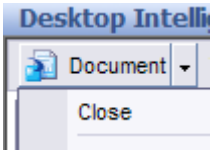
Clicking on the Refresh icon 

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.

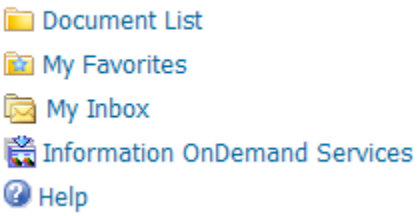
The icon and the Document Close 

both close the current report and takes you back to your Category View.

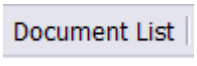
Inbox

To get to Inbox, either click on the Home button

then on Inbox



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.