InfoAdvantage Reports

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Link to 3.10 InfoAdvantage:

http://infoadv.in.co.monterey.ca.us/BOE/BI

1) User logs in to InfoAdvantage using their userID.

2) Once logged in, user will be in InfoAdvantage main menu:
3) User will select the **Documents** tab, located on the top left hand corner of the screen:

![Documents tab screenshot]

4) User will navigate to the folders library by clicking **Folders** on the bottom left of the screen:

![Folders library screenshot]
5) The folder library will slide up and user will see all the folders they have access to.
   Double click on **Public Folders (or click the +)** to see all your folder options.

![Folder Library Diagram]

6) Public folders will appear in the middle portion of the screen. User will select **appropriate folder**, and a list of folders will appear.

![Folder List Diagram]
7) The folders listed can be opened by double clicking on the category you wish to view:

Example: Double click on Payroll folder and the below reports will appear:
8) To navigate back to the beginning, click on the HRM folder in the left pane:

9. To run a report, double click on report. When report appears, you will need to click on the refresh button located on the lower right hand corner.
10. The refresh button will bring up the prompts page.

1. Prompts Summary all arrows will need to be green before report can run.
2. Each prompt will require either a wild card (*) or data. To access data click on the refresh button and once you select values you can double click or use arrows to populate parameters of report.
3. To run report, the “OK” button must go to black, then click on report and run.
11. To save reports or download, use the export button. The following will pop up.

12. To export report as a PDF, select Export Document As, click on arrow and select “PDF”.

13. To export report as an Excel file, select Export Document As, click on arrow and select “Excel”.
14. To export report as a CSV file, select Export Document As, click on arrow and select Export Data to CSV.

15. To close report click on the and a prompt will come up to ensure you want to Close report.