

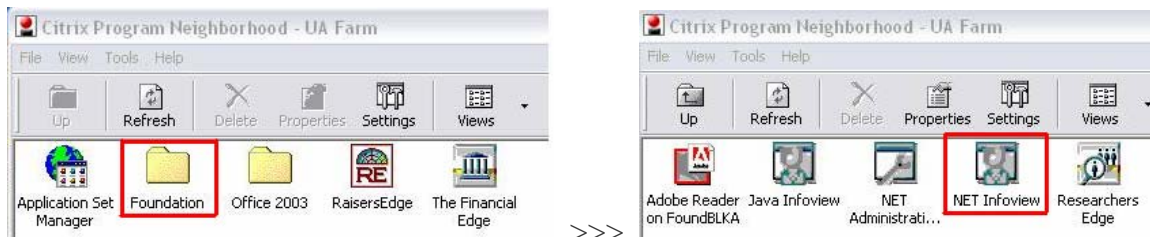
Last Updated: September 2007

II.1 Running a Crystal Report from Infoview

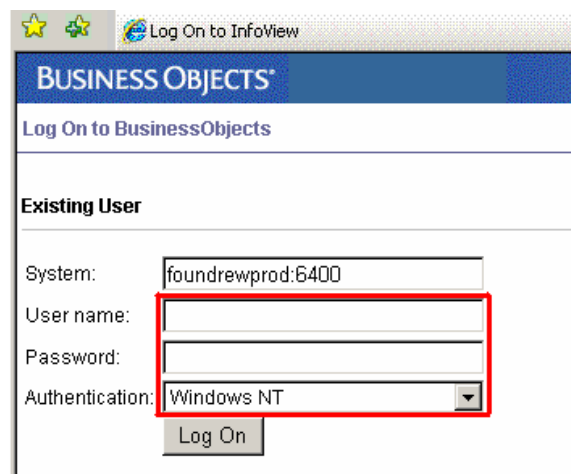
This document describes how to run a crystal report from Infoview. The basics of running a report are the same for any report, however the parameters will vary from report to report. If you have questions on what parameters you should be using, or what the parameters mean, please contact the Foundation Database Administrator.

1. Log On to Infoview

- a. Open your “Citrix Program Neighborhood” normally located on your desktop
- b. Open the “Foundation” folder and locate the “NET Infoview” icon, double click to log on to Business Objects



- c. Blank out the username and password, and make sure that the authentication dropdown box is set to “Windows NT”



Log On to InfoView

BUSINESS OBJECTS®

Log On to BusinessObjects

Existing User

System: foundrewprod:6400

User name:

Password:

Authentication: Windows NT

Log On

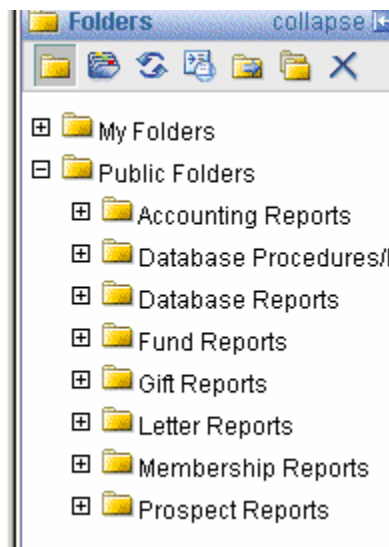


d. Click “Log On”

The screenshot shows a web browser window titled "Log On to InfoView". The main heading is "BUSINESS OBJECTS" and the sub-heading is "Log On to BusinessObjects". Under the heading "Existing User", there are four input fields: "System:" with the value "foundrewprod:6400", "User name:", "Password:", and "Authentication:" with a dropdown menu set to "Windows NT". A "Log On" button is located at the bottom of the form, highlighted with a red rectangular box.

2. Navigate to the report you wish to run

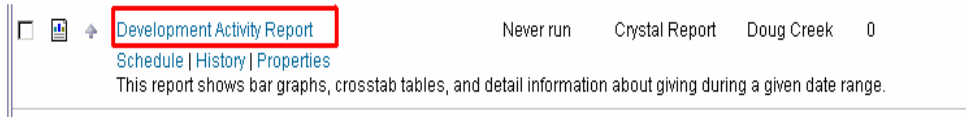
- a. Clicking on a folder shows the contents of that folder
- b. Clicking the + sign next to a folder shows any folders within
- c. Note that you may or may not see all of the above categories, depending on your security level





3. Run the report

- a. Click the title of the report you wish to run

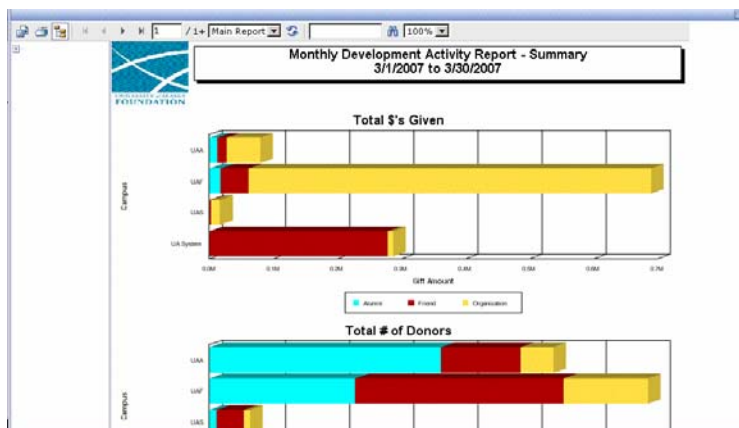


- b. If there are parameters for the report, a parameters window will show. Fill in the appropriate parameters as you wish.

Enter prompt values.

Run as what campus? (changes the header)	run_as
Blank	
Would you like to display the parameters?	disp_parameters
No	
Would you like to print the charts on the first page.	print_charts
Yes	
Would you like to print the cross tabs on the second page of the report?	print_cross_tabs
Yes	
Would you like to print the gift detail on this report?	print_gift_detail
No	

- c. After some time, your report will be displayed for your review in the window

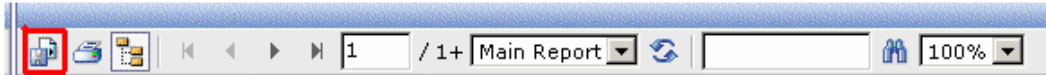




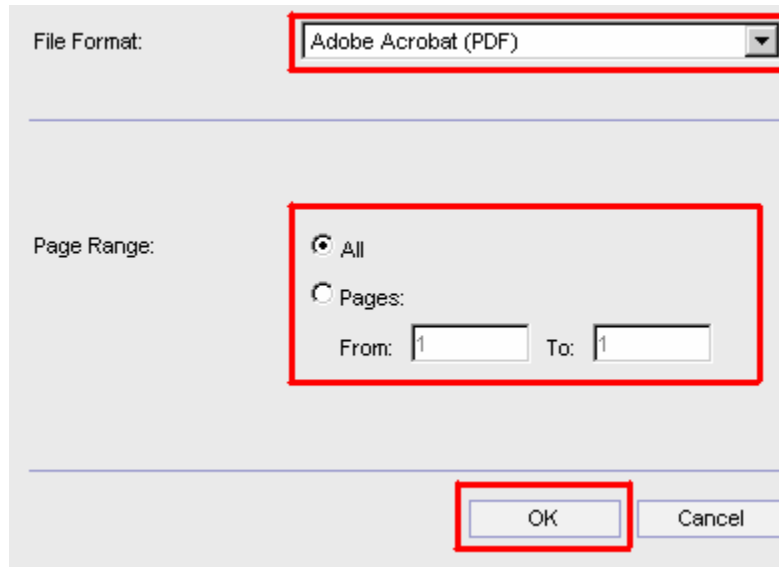
4. Exporting to Save/Printing the Report

a. To export your report to PDF and save to your desktop

i. Click the “save/export” button in the toolbar above the report



ii. A popup box appears

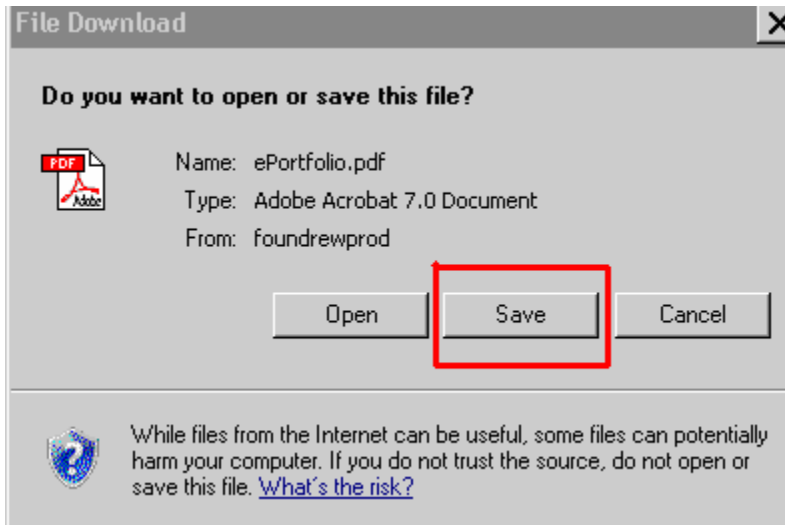


iii. Make sure the file format is set to “Adobe Acrobat (PDF)”

iv. Set the page range if appropriate

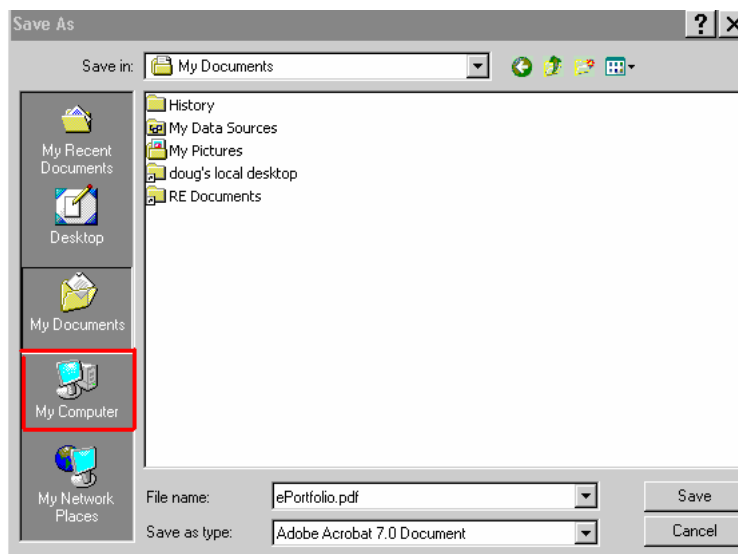
v. Click “OK”

vi. A “File Download” dialog box appears



vii. Click “Save”

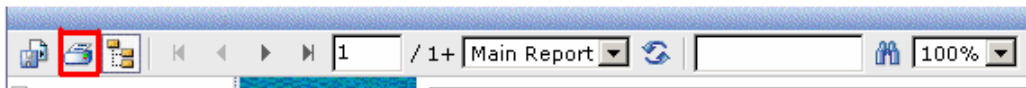
viii. A “Save As” dialog box appears (Note: You are looking at the server here, NOT your computer)



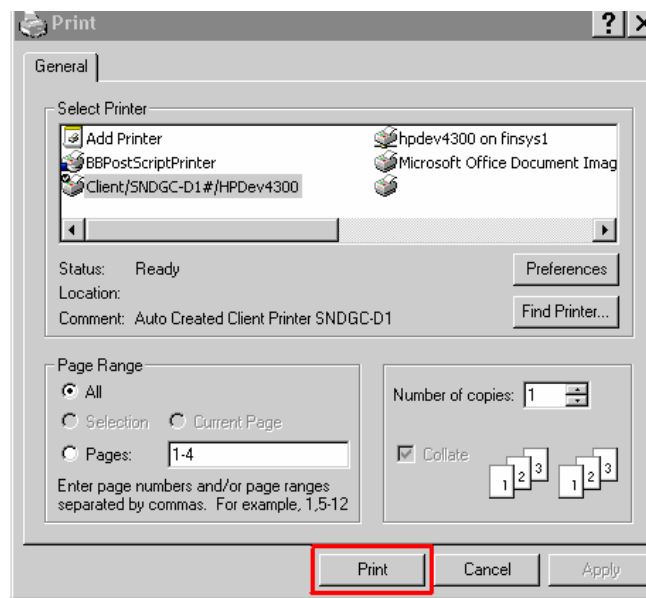
ix. Click “My Computer”



- x. Double Click the “C\$ on ‘Client’ (V:)
 - xi. Double Click “Documents and Settings”
 - xii. Double Click your username
 - xiii. Double Click “Desktop”
 - xiv. Change the Filename as appropriate
 - xv. Click Save
- b. To Print your Report
- i. Click the “Print” button above the report (NOTE: Do not go to file print, it will not print the report)



- ii. The “Print” dialog box appears

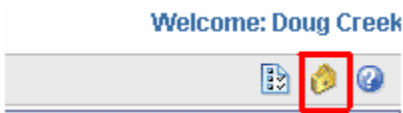


- iii. Set the options as appropriate and click the “Print” button



5. Log Out

When finished running reports, click the “Logout” (lock) button located in the upper right of the program



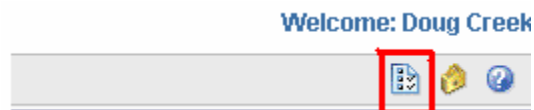


Additional Features of Infoview

1. Setting Infoview Preferences

Business Objects documentation on these preferences is available from the Foundation Database Administrator.

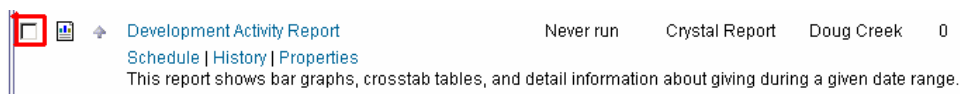
- a. To change your preferences, select the “Preferences” button from the upper right toolbar of the program



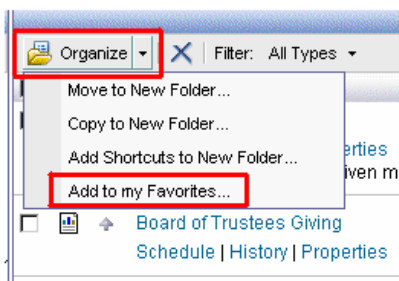
2. Adding a report to “Favorites”

Adding a report to your favorites provides you an easy way to group the reports you use the most. You can also create your own set of folders to store the reports. Note that the report is still linked to the “main” report, so as updates are done to that report, they will be transferred automatically to the report you have saved in your favorites.

- a. Navigate to the report you wish to add to your “Favorites”
- b. Click the check box next to the report(s) you wish to add to your favorites

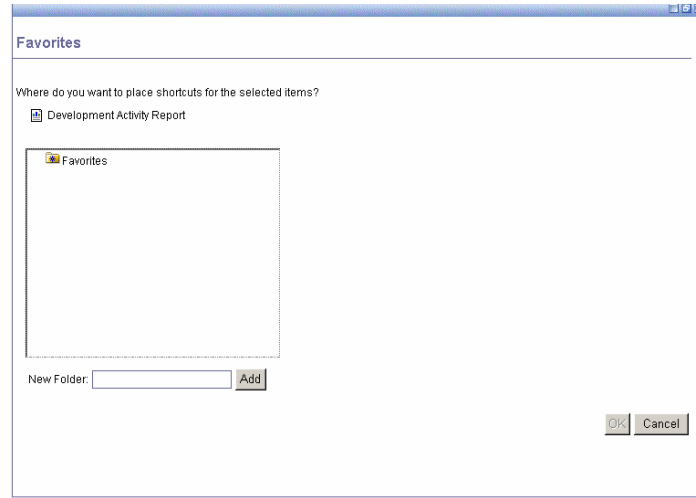


- c. In the bar above the report listing, click “Organize”, and select “Add to my Favorites”





- d. Select the folder to put the report in (or just select “Favorites”) and click “Ok”



3. Dashboard Reports (My Infoview)

Not yet implemented. More details to follow...