

Tips and Tricks for InfoView Reports

Your First InfoView Login


The first time you log into InfoView, remember to set the Authentication to LDAP. Otherwise, you'll get an error when you log in. InfoView should remember this setting for future logins. If you delete cookies from your computer, you might have to reset the authentication to LDAP the next time you log in.

Useful Changes to User Preferences in InfoView

Making the Categories View your Default View

If you like to view the reports available by category, you can set this as your default view in InfoView. This way, you won't have to toggle from the folders view to the categories view each time you log in. To make the categories view your default view:

1. Go to the home page in InfoView. This is the page that first appears when you log into InfoView (unless you've customized InfoView and changed the home page).

You can click the home icon  to return to the home page from anywhere in InfoView.

2. Click the **Personalize InfoView now** link in the upper right corner of the page.
3. The second section of the page reads **My default navigation view is....** By default, *folder* will be selected. To change the default view to category, click the radio button next to the word *category*.



My default navigation view is ...


Folder

Category

4. If you do not want to change any other setting, scroll to the bottom of the page and click **Apply**, and then click **OK**. Otherwise, make any other changes needed to your user preferences before saving.

Viewing all Reports in a Folder on One Page

If a folder or category contains many reports, the list of reports might span multiple pages in InfoView. You can determine how many reports appear in one view, though. To change the number of reports that appears on a page, follow the steps below:

1. Go to the Home page in InfoView. 
2. Click the **Personalize InfoView now** link in the upper right corner of the page.
3. The page that appears should be the **General tab** of InfoView **Preferences**. Click the General tab if it is not already open.
4. Scroll to the middle of the General page, to the **On my desktop...** section.

5. Change the number in the box next to ***Set the number of objects (max.) per page*** to a very high number, such as **50**. This maximum should accommodate all reports stored in a folder or category on one page.

On my desktop ...

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

6. Scroll to the bottom of the page and click **Apply**, and then click **OK**.

Saving Reports to Your Favorites Folder

InfoView provides you with a *Favorites* folder, to which you can save reports that you generate often. Saving reports to this folder gives you faster access to just the reports that you need. Note that if you choose to save reports to your Favorites folder, you will probably not want to change your default view to the categories view. Also, if you use your Favorites folder for accessing reports, **be sure to check back periodically to the Public Folders or Corporate Categories where reports are stored to see what new reports are available for you.**

To save a report to your Favorites folder:

1. Generate the report you want to save.
2. From the **Documents** menu, choose **Save As**.
3. On the Save a Document page, change the default title of the report, if needed. To save the report to your Favorites folder*, click the **My Folders** folder under Location, and then click the **Favorites** folder.
4. Click **OK** in the lower right corner of the screen to save.

*If you want to save the report to a **Personal Category** instead, click the plus sign next to Categories on the Save As page. Click to check the **Personal Categories** checkbox and click **OK** in the lower right corner of the screen to save.