Cheat Sheet

InfoView is an application that allows users to access business critical documents via the web. We are currently using this as a Crystal Reports Viewer.

Log on Screen

1. Type in your SUNYSB.EDU NETID
2. Type in your NETID password
3. Click Log On

Documents Screen

1. Folder selection window, most are named by application or department function
2. Report selection window, where the reports for the selected folder are listed
3. Search for a report by title
4. Log Off

Home Screen
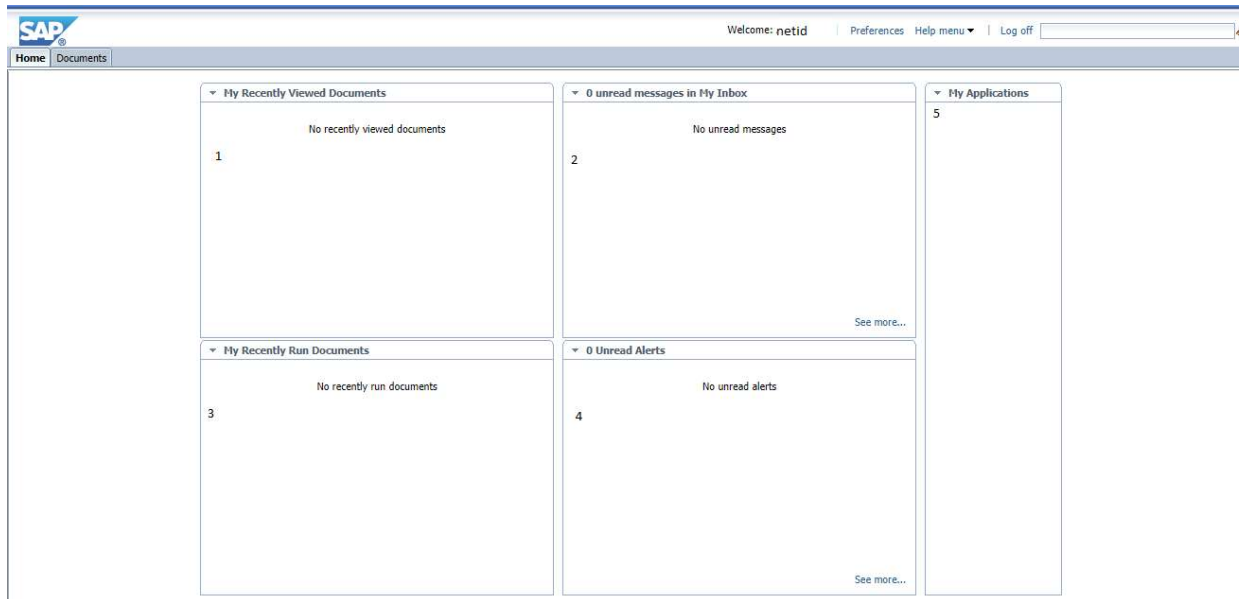
1. Shortcut to Recently Viewed Documents
2. Shortcut to Inbox (where automated delivered reports of recent notifications will appear)
3. Shortcut to Recently Run Documents
4. Alerts (where messages from the System Administrator may appear)
5. My Applications (should be blank, as these plug-ins have not been purchased)
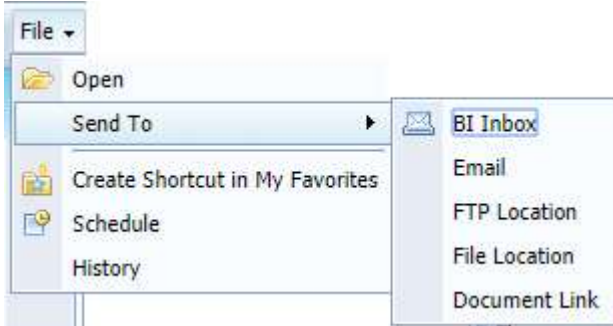
Report Preview Screen

To run a report double click the title from the Documents tab Report selection window.

    a. If prompted input report parameters (Example: Date Range)

Menu Items
1. Open in new window
2. Pin this tab
3. Close this tab
4. File Options

5. Go Back
6. Go Forward
7. Print this report
8. Refresh Report
9. Export this report
10. Go to Previous Page
11. Go to Next Page
12. Page Navigation
13. Zoom
14. Find

15. Group Tree (if report was configured to group content)
16. Report Preview window