

Using Infoview Training Module 1 Script

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Introduction

This Infoview training module is provided by the Minnesota Dept. of Health WIC Program. It provides an overview of how to navigate within Infoview.

Preferences

Home Tab

The Welcome bar is available throughout Infoview.

It displays the name of the logged in user and an applications menu option, also available on the right side of our Home tab, which is only used by report designers at the State Office.

Go ahead and click on Preferences.

<no audio> Click on *Preferences*.

Preferences

The State has defined the default settings for all users so we're just going to leave those as-is.

The only preference we may really need to access is the ability to change our password at any time.

<no audio> Click on *Change Enterprise Password*.

Change PW

Go ahead and click the *Cancel* button.

<no audio> Click the *Cancel* button.

Tabs

Two Tabs

There are two tabs that always display when we open Infoview: Home and Documents.

When we open a specific Infoview report, such as MISSED APPOINTMENTS, a tab for that report displays.

We can view the entire title of a report, if not shown on the tab, by hovering over it.

<no audio> Hover mouse over CERTIFICATIONS tab.

<no audio> Click when ready to continue.

Tab Icons

These two tabs displayed as soon as we opened Infoview because we had previously pinned these reports.

There are three icons on each tab. Hover the mouse over the first icon on the MISSED APPOINTMENTS tab to view what the icon does then click it.

<no audio> Hover mouse over first icon on the MISSED APPOINTMENTS tab to view the icon label then click it.

New Window

As we can see, the icon simply functions to open the report in a new browser window.

The primary advantage may be that it provides more viewable real-estate.

Go ahead and close this window.

<no audio> Click the X to close this new window.

Unpin

Notice that currently the second icon is a green vertical pin.

Go ahead and hover over it then click it.

<no audio> Hover mouse over second icon on the MISSED APPOINTMENTS tab to view the icon label then click it.

Pin

Hover over it again.

<no audio> Hover mouse over second icon again to view the icon and its label.

<no audio> Click when ready to continue.

Toggle

Now that we've clicked it, it is a blue horizontal pin.

It toggles back-and-forth and is how we pin and unpin reports.

Since we've unpinned the MISSED APPOINTMENTS report, the next time we open Infoview the tab will no longer automatically display.

Pinning is an optional function that provides easy and immediate access to our most commonly used reports...

Many Tabs

...and we can pin as many reports as we want.

If the number of tabs exceeds our available real-estate, we can use the arrows to move between them.

<no audio> Click the *right arrow* icon.

Ellipses Icon

We can also click the ellipses icon...

<no audio> Click the *ellipses* icon.

Ellipses List

...to display a list of the report tabs and select one from the list...

<no audio> Select *LOW HEMOGLOBIN*.

HGB Report

... to open or display it.

<display> Low Hemoglobin report displays.

The third icon closes the report tab. Go ahead and close the Low Hemoglobin report tab.

<no audio> Click the x on the LOW HEMOGLOBIN report tab to close it.

Home Again

We can also click the ellipses icon to return to the Home tab. Go ahead and do that.

<no audio> Click the *ellipses* icon.

<no audio> Select *Home*.

Recently Viewed Docs

Up to the last 10 reports, or documents in Infoview, we've opened will display under My Recently View Documents.

Display Properties

We can view general information about the reports listed here by hovering over their titles.

<no audio> Click when ready to continue.

The Documents Tab: My Documents

Documents Tab

Next, click on the Documents tab.

<no audio> Click the *Documents* tab.

My Documents

The Documents tab is where the reports and documents are actually stored in Infoview.

It automatically opens to My Documents, which is where we save reports in order to be able to use them.

My Documents has a primary folder called My Favorites.

Folder Structure

The folder structure within My Favorites displays on the left panel and both the folders and individual reports on the right panel.

This is important to note: We can only run reports that we have saved within our **My Favorites** folder under My Documents.

The WebIntelligence folder...

<no audio> Click the WebIntelligence folder.

WebIntelligence

...is for temporary files created by the system and we won't use its contents.

A common mistake is to save our reports into this folder and if we do, we won't be able to use them.

Go ahead and click on My Favorites.

<no audio> Click on My Favorites.

My Documents 1

We also don't use either the Inbox or Personal Categories.

If we have more than 50 items in our My Favorites folder, we will have multiple pages and we can use the page arrows to view other pages.

The Created On column is the date we saved the report to our My Favorites folder.

Viewing

We can single-click to view the contents of a folder on the left panel, or double-click to view the contents of a folder or open a report on the right panel.

Ad-hoc report templates are distinguishable from other types of files because their titles are always uppercase.

We can view details about a report by selecting it and clicking Details on the menu bar. View the details for the DAILY STAFF ACTIVITY report.

<no audio> Click on *DAILY STAFF ACTIVITY* to select it.

Details

<no audio> Click *Details*.

Close Details

When ready, click the X in the Details panel to close it.

<no audio> Click the X in the Details panel to close it.

Folders is where we access other reports available to us. Go ahead and click on Folders.

<no audio> Click on Folders.

Documents Tab: Folders

Folders

Folder has a primary folder called Public Folders, the contents of which automatically display on the right panel.

We can also click on the plus or double-click on Public Folders to expand its contents in the left panel. Go ahead and do one or the other.

<no audio> Single-click on the plus or double-click on Public Folders.

Expand Public

So, we can work in either panel. Let's work in the right one since we have more real estate.

We have 4 main folders and each contains different types of reports.

Let's take a look at each of them. Double-click on AGENCY EOM in the right panel.

<no audio> Double-click on *AGENCY EOM*.

Agency EOM

Now, 2020...

<no audio> Double-click on 2020.

...202012...

<no audio> Double-click on 202012.

...and Minnesota Reports.

<no audio> Double-click on *Minnesota Reports*.

Agency EOM 1

The AGENCY EOM folder includes reports created during the End-of-Month, or EOM, process, which occurs around the 15th of each month. Hence, the folders for each year and month.

This process will change in mid-Spring 2021 and reports will no longer be created as part of EOM. However, some of the reports will continue to be created by our contractor and added to this folder.

File Types

We have Excel and PDF files as indicated by the icons preceding the reports.

Files that aren't Infoview report templates do not need to be saved to our My Favorites folder before opening.

Close Tabs

But before we open one of these, let's close our unpinned report tabs.

<no audio> Click the x on the STAFF & CLINIC PRODUCTIVITY tab.

<no audio> Click the x on the DAILY STAFF PRODUCTIVITY tab.

<no audio> Click the x on the MISSED APPOINTMENTS tab.

Open SummaryStats

Now, double-click on the SummaryStatisticsReport to open it.

<no audio> Double-click on the SummaryStatisticsReport.

PDF Docs

PDFs open in a tab in Infoview and have most of the functions found if it were to open in a browser window, including download and print.

We can search the PDF by using CTRL + F (for FIND), say, for Washington.

Close SummaryStats

Go ahead and close this report.

<no audio> Click the x on the SummaryStatisticsReport tab.

And close the Find bar.

<no audio> Click the x on the Find bar.

Go ahead and re-open the Documents tab.

<no audio> Click the *Documents* tab.

Excel Docs

Now let's open the first Excel doc by double-clicking on it.

<no audio> Double-click on *Formula Issued – Local Agency Breakdown*.

Excel documents open a tab but don't actually open in the browser. Instead, we download them and open them in Excel.

Which we aren't going to actually do so go ahead and close both the download bar and the report tab.

<no audio> Click the x on the download bar to close it.

<no audio> Click the x on the report tab to close it.

And go back to the Documents tab.

<no audio> Click the *Documents* tab.

Return to Public Folders

To return to the contents in Public Folders, we'll simply click on Public Folders in the left panel.

<no audio> Click on *Public Folders* in the left panel to select.

Annual Reports

Annual reports are created by the State Office and posted for each year.

Many of the same reports are on the MDH WIC website but these are specific to the Agencies and Grantees.

Go ahead and double-click to see the contents.

<no audio> Double-click on *ANNUAL REPORTS*.

Review on Own

We can take time to look through these folders on our own. Let's go back to our main folders.

<no audio> Click on *Public Folders* in the left panel to select.

State EOM

The State EOM folder contains reports for the State Office. We may or may not see this folder depending on our level of access. If we do see it, we can explore it on our own time.

Infoview Templates

The Infoview Templates folder is where our ad-hoc reports are stored.

Go ahead and double-click on it.

<no audio> Double-click on *INFOVIEW TEMPLATES*.

Template Folders

All of our templates, of which there are over 200, are stored in a folder based on a category or topic in an attempt to organize them. These are the same topics found on the Infoview Guidance Documents page on the MDH WIC Website.

Categories

And there are quite a few. Click the scroll bar to view all of them.

<no audio> Click below the scroll bar.

<no audio> Click below the scroll bar.

<no audio> Click below the scroll bar.

We should note that the *MN_BI_WORKSPACE* isn't something we use.

<no audio> Click when ready to continue.

Scroll

<display> List scrolls back to top.

Topic Folders

Each report is only stored in one folder but could potentially cross topics so if we don't find what we are looking for in one folder, we should try another.

Some topics, like Counts...

<no audio> Double-click on the *Counts* folder.

Sub-Topics

...have sub-topic folders.

Both the report template and its Guidance Document, which provides details about the report, are posted to these folders.

We'll take a look at how to use the report template in the next module.

The Documents Tab: Search

Search

The last function we'll look at in this module is Search.

There are two different ways to start a search; at the top right of each screen or on the left panel.

Click on Search on the left panel.

<no audio> Click *Search*.

Search 1

Let's click into the search field and type: initial then click the Search icon

<no audio> Click in the *Search* field.

<no audio> Type: initial and click the Search icon (or press the Enter key).

Search – wait

<display> Blank screen waiting for results.

Search Results

Notice *initial* also populated the other search field so the fields work in tandem.

The Search Results include all reports and documents with the word "Initial" in them; it also includes all versions and which folder they can be found in.

We can refine our search results by the kind of file, the folder it's located in, and when it was last run.

If we only want to see Infoview report templates?

Then click on web intelligence under Type.

<no audio> Click on *web intelligence* under Type.

Search Filter

If we only want to see reports in our My Favorites folder?

Then click on user folders under Location.

<no audio> Click on *user folders* under Location.

To remove the filter, simply click the X in front of it.

<no audio> Click the x in front of user folders.

And we double-click on the desired report or document to open it from here.

Let's open the version in our user folder.

<no audio> Double-click on INITIAL CONTACT REQUIREMENTS NOT MET in User Folders.

End Slide

Thank you for reviewing this on-demand training module provided by the Minnesota Department of Health WIC Program.

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