Using Infoview Training Module 2 Script

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Introduction

This Infoview training module is provided by the Minnesota Dept. of Health WIC Program.

It provides a general overview for using ad-hoc report templates in Infoview.

Guidance Documents

Last Module

In the last module, we opened the Initial Contact Requirements Not Met report found in our User Folders after searching for the word Initial.

User Folder

The User Folder is our own My Favorites folder from the Documents tab…

<no audio> Click the *Documents* tab.

My Favorites

…found under My Documents…

<no audio> Click the *My Documents* bar.

…and we are able to run the report because we previously saved it to our My Favorites folder from the INFOVIEW TEMPLATES folder, which we'll talk about in detail in a couple of minutes.

Can you get us back to the INFOVIEW TEMPLATES folder?

<no audio> Click anywhere for a hint.

<no audio – failure hint> Click the *Folders* bar.

Close Agency EOM

Before we begin again, let's close the AGENCY EOM folder in the left panel.

<no audio> Click the - next to AGENCY EOM.

Guidance Documents

Ad-hoc Infoview reports are signified by Web Intelligence icon, and as we mentioned before, always have uppercase titles.

Their Guidance Documents, or documents with detailed information about the report, is always posted with the template.

This should be our first go-to for information about a report. They are available here and on the MDH WIC website.

Let's take a look at the guidance doc for the Counts of New Participants report.

<no audio> Double-click the *Counts of New Participants Guidance Document*.

Transition Slide

<display> Transition to overview slide.

GD Overview

These are working documents that are updated whenever a revision or change is made to an existing template. They explain all of the components that make up the report and are also used for trouble-shooting if not working correctly, and to help answer questions about how the report works.

Transition Slide

<display> Transition back to guidance document.

Guidance Doc 1

The Guidance Doc starts with the topic folder the report template can be found in and the create or revision date.

Templates are revised to correct issues with the output or to meet requests or needs from agencies using the report.

If a template has been revised then the revisions are listed at the end of this document.

Only the **most recent version** is posted to the INFOVIEW TEMPLATES folder.

The Report Overview is a high-level explanation of the report output.

We're going to click through the rest of this document.

But before we do, we should note that this particular document is 19 pages long, so we've skipped chunks of it in order to focus on the topic headers just to get an idea of the type of information provided.

<no audio> Click below the scroll bar.

Guidance Doc 2

The next sections are some ways the report can be used and some notes for users about the report output.

<no audio> Click below the scroll bar.

<no audio> Click below the scroll bar.

Then images of each tab of the report output.

<no audio> Click below the scroll bar.

Transition Slide

<display> Transition to overview slide.

Prompts GD

Followed by the PROMPTS.

Prompts allow a report template to be run for different variables, such as, in this instance, agencies and dates. It gives it flexibility and individualizes it.

The first column is technical and links to the screen or function in the Information System that the field is associated with.

It is explained in the PROMPT & DEFINITIONS column.

DB Lesson

So, let’s take 3 minutes for a short lesson about data and where it comes from.

The WIC Information System has many tables that store different types of information.

Depending on what we are doing in the system, data is stored in the appropriate table.

If we are prescreening, their Agency ID and WIC Type, which is their current information, is stored in the MEMBER table.

If we are certifying, their Agency ID and WIC Type, which is based on where they were certified and their WIC Type at the time of the cert, is stored in the CERTCONTACT table.

If we are issuing benefits, their Agency ID and WIC Type, which is where benefits were issued and their WIC Type at the time of issuance, is stored in the FOODINSTRUMENTSET table.

Most tables have a unique field, such as State WIC ID, to link them.

So, depending on the table from which data is being pulled for the report, the same field, such as Agency ID or WIC Type, can provide different information.

Lastly, each table usually has contact dates, which again, depending on the table, are different time periods.

Prompts GD 1

That means this PROMPTS table tells us the agency is coming from the CERTCONTACT table, or where the participant was certified.

Our start and end date are both the Cert Start Date so our output includes all participants certified between those two dates.

This is important because it makes a difference in the type of information we are getting in our report output.

For example, participants certified at our agency during a specified time period may no longer belong to our agency.

When we run a report we need to understand where the information is coming from so that we know what it is telling us.

The Value column tells us the format to enter into the prompt; our agency ID is 3 digits and our dates are month-day-year.

<no audio> Click below the scroll bar.

Static Criteria

The Static Criteria is a combination of technical and non-technical.

The Explanation portion tells us other criteria that is used to filter the report output.

<no audio> Click below the scroll bar.

The Report Output Definitions lists each column or row in the output, whether a variable or formula was used and, similar to the prompts, where it comes from for each tab in the report.

It also provides counts, as well as sort order and any grouping.

Technical Notes

The next sections are Technical in nature and intended for the report designer, or anyone who may need to update or revise the report in the future.

<no audio> Click below the scroll bar.

<no audio> Click below the scroll bar.

<no audio> Click below the scroll bar.

The last section is Revisions and for this template, there aren’t any.

Go ahead and close the tab.

<no audio> Click anywhere for a hint.

<no audio – failure hint> Click the x in the *Counts of New Partici...* tab.

End Section

<display> Returns to Documents screen.

Report Templates

Template

OK. Let's take a look at the COUNTS OF NEW PARTICIPANTS template.

We've mentioned, a couple of times now, that we need to save the template to our My Favorites folder before running.

But, what happens if we don't?

Let's try it out.

Double-click on the COUNTS OF NEW PARTICIPANTS report.

<no audio> Double-click on *COUNTS OF NEW PARTICIPANTS.*

No Prompts

The template opens but it should have prompts for the agency and dates, which should display in the left panel.

They aren't part of the document summary.

Let's try clicking the icons on the left nav bar.

<no audio> Click the *Navigation Map* icon.

Click the next icon.

Nor the Navigation Map.

<no audio> Click the *Input Controls* icon.

Nope. And of these three, only Input Controls will be used.

Save As

Templates are meant to be shared with all users.

Therefore, some of the functionality is locked so that they can't be run until we save them to our My Favorites folder.

We're being intentionally repetitive because it is the most common mistake new users make.

They can't figure out why they can't run the report and it is always, **always**, because they haven't saved it to their My Favorites folder.

There are a couple of ways to do this. Let's start with the obvious and Save As.

First, click the drop-down arrow next to the Save icon.

<no audio> Click the *drop-down arrow* next to the *Save* icon.

Notice that our only option is to Save As.

And if we were just to click the icon itself…

<no audio> Click the *Save* icon.

Save

…the **Save As** modal opens.

So, what if we try to save to one of the Public Folders, which is the default, such as Agency Management?

<display> Mouse clicks on Agency Management folder to select.

<display> Mouse click on Save button.

This nasty-looking message displays, the gist of which is that we don't have the rights to save to that folder. Go ahead and click OK.

<no audio> Click the *OK* button.

Save to Favorites

So, let's save it to our My Favorites.

<no audio> Click the *Save* icon.

Notice the Favorites Folder bar? Click on that.

<no audio> Click the *Favorites Folder* bar.

In the right panel is the contents of our My Favorites folder.

We could save it to My Favorites, a folder within My Favorites, or create a new folder.

Let's do that. We'll add a new folder called COUNTS.

<no audio> Click the *Create Folder* icon.

New Folder

<no audio> Type COUNTS and click the OK button.

Quirk

Just like anytime we "save as", we can change the file name if we want to. For now, let's keep it as-is and finish saving our template.

All software has its quirks, and this is one of Infoview's.

If we were to select our new COUNTS folder in the **right** panel and click Save…

<display> Mouse clicks on COUNTS folder in right panel

<display> Mouse clicks on Save button.

…and go to our My Favorites folder…

Wait. Can **you** get us there?

<no audio – failure hint> Click the *Documents* tab.

<no audio – failure hint> Click the *My Documents* tab.

Wrong Folder

We would see that although the COUNTS folder has been added, the COUNTS OF NEW PARTICIPANTS template is in our main My Favorites folder…

<display> Mouse clicks on COUNTS folder.

…and has not been saved to our new COUNTS folder, which is easy enough to correct by cutting and pasting it into the correct folder, but let's do it right the first time.

We're going to go back to when we selected our new COUNTS folder, which we want to save our template into.

Saving Right

To save it to our new COUNTS folder, we are going to expand the Favorites Folder in the **left** panel…

<no audio> Click the + next to Favorites Folder.

…and select the COUNTS folder in the **left** panel…

<no audio> Click the *COUNTS folder* to select it.

…effectively opening the folder in order to save to it.

<no audio> Click the *Save* button.

OK. Let's verify it worked. Once again, can you get us back to My Favorites again?

<no audio> Click anywhere if you need a hint.

<no audio – failure hint> Click the *Document* tab.

<no audio – failure hint> Click the *My Documents* bar.

Yep. It worked. It's not in our main My Favorites list and if we click the COUNTS folder…

<no audio> Click the COUNTS folder.

…there it is.

Let’s go back to the report and take a look at it now that it’s saved to our My Favorites.

<no audio> Click the *COUNTS OF NEW PARTI…* tab.

Saved Template

Notice there are now two more icons.

The bottom one, Comments, we don’t use.

However, the second to the bottom is the most important because it is our User Prompts Input icon. Go ahead and click on it.

<no audio> Click the *User Prompts Input* icon.

Transition Slide

<display> Transitions to overview slide.

Prompts Not Showing

There are two other reason why prompts may not show:

1. The icon needs to be selected on the left toolbar.
2. A few reports don’t have any prompts and simply need to be run for the most current information.

Transition Slide

<display> Transitions back to Infoview screen.

Prompts

A couple of other things about prompts.

The prompts use general language and do not specify where the information is coming from.

The default values are whatever the report designer last entered before posting it to the Infoview Templates folder.

If we could enter more than one value into a prompt, agency or otherwise, we must separate them by using a semi-colon and no spaces.

If Infoview sees a space it will stop reading the values.

Again, this is indicated in the guidance document.

Agency Prompt

So, let’s enter some values.

If our agency is 21, the PROMPT tells us that we must enter a 3-digit Agency ID, so we'll enter 021.

<no audio> Double-click on 241 to highlight it.

<no audio> Type: 021

Date Prompt 1

We're going to click-and-drag to highlight the start date.

OK, so let's say we want to see the number of participants new to our agency's WIC Program in December 2020.

We don't have to use preceding zeros when entering dates, nor do we have to enter 4 digits for the year or the time.

So, let's enter 12/1/20 for our Start Date.

<no audio> Type: 12/1/20

Date Prompt 2

We'll click-and-drag to highlight the end date as well.

Enter our end date of 12/31/20.

<no audio> Type: 12/31/20

Run Report

To run our report, we simply click on Run.

Go ahead and do that.

<o audio> Click the *Run* button.

Quirk 2

Before we go any further, we need to address another one of Infoview's quirks.

There are date selection calendars but if we use them our report will error out because it enters time periods along with the new dates.

<display> Mouse clicks Start Date calendar and selects December 1.

<display> Start Date field reads: 12/1/2020 12:00:00AM.

<display> Mouse clicks End Date calendar and selects December 31.

<display> Start Date field reads: 12/31/2020 12:00:00AM.

<display> Mouse clicks Run button.

Quirk 2 Error

The error is in typical techno-speak but the gist is that it couldn’t read the date because of the time value.

Long-story-short, we don’t use the calendars to select dates.

And, we don’t enter times into our date fields.

However, if the system inserts a time after running or saving a report, we don’t need to delete it. It only errors out if the values are **changed** and a time is entered before running the report.

Report Tabs

Most reports have multiple tabs.

They open to the tab that was displaying when it was last saved.

We can view all of the report tabs by clicking this drop-down.

<no audio> Click the *Report Tab drop-down* button.

The tabs are ordered first to last, left to right.

Go ahead and select the first tab.

<no audio> Click on *Race Ethnicity (State)*.

Pages

We can also select them at the bottom. Select the last visible tab.

<no audio> Click the *Zip Co…*tab.

And the tabs shift accordingly.

Tabs may have multiple pages and we can view them using the page arrows.

This tab only has one page, so let’s select the WIC Type (State) tab.

<no audio> Click the *WIC Type (State)* tab.

Page Arrow

And click the right arrow to go to the next page.

<no audio> Click the *Go to Next Page* arrow.

The + indicates there are more pages.

The right arrow with the line will take us to the last page. Click it.

<no audio> Click the *Go to Last Page* arrow.

Page Mode

The next two icons dictate how the pages display. It defaults to the Page mode.

The other icon is the Quick Display mode. Go ahead and click it.

<no audio> Click the *Quick Display mode* icon.

Depending on the length of the report, it will remove the pagination.

No Pagination

<display> Scrolls through report tab.

Side Panel

Let's go back to our page view.

<no audio> Click the *Page mode* icon.

We can also change the size of the report view and the last time the report was run, or refreshed, is indicated in the bottom right corner.

If we want more viewable real-estate, we can close the side panel.

<no audio> Click the *Close Side Panel* icon.

To re-expand, we simply click any one of the icons.

<no audio> Click the *User Prompt Input* icon.

Print

Our print function automatically converts our report to a PDF.

<no audio> Click the *Print* icon.

It opens in your default Adobe reader program.

Find

The binoculars icon finds specific text on the current page.

<no audio> Click the *Find* icon.

It opens a search bar above the tabs.

The drop-down arrow next to the binoculars…

<no audio> Click the drop-down arrow next to the binoculars.

…allows us to specify case.

<no audio> Click the drop-down arrow again to close the option menu.

Let’s search for Dakota. Click inside the Find field.

<no audio> Click inside the *Find* field.

<no audio> Type: **Dakota** and click the *Binoculars* icon or press the Enter key.

No Match

If a match is found on this page, Infoview will identify it.

If there isn’t a match…

<no audio> Double-click on *Dakota* in the Find field to highlight.

<no audio> Type: **Sherburne** and click the *Binoculars* icon or press the Enter key.

No Match 1

…it’ll indicate that also.

Click the x on the far right to close the Find bar.

<no audio> Click the x to close the Find bar.

Scroll

<display> Report scrolls back to top.

End Slide

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

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