Using Infoview Training Module 3 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 of exporting ad-hoc templates and managing the My Favorites folder.

Exporting Ad-Hoc Reports

Export

The Export function allows us to download the report as a specific file type.

<no audio> Click the *Export* icon.

The default is to download it as a report. We can choose to do a basic data-dump by selecting Data.

<display> Mouse selects Data radio button.

<display> Options change to only CSV.

<display> Mouse clicks OK button.

<display> Example of CSV file displays.

Select Tabs

The default is to export all tabs of the report.

We can choose to just export one or more tabs by de-selecting Select All.

<no audio> Click the *Select All* checkbox to de-select it.

<no audio> Click to scroll through the tabs.

Scroll

<display> List of tabs scrolls to bottom.

Current Report

Let's export the WIC Type (State) tab.

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

<no audio> Click below the scroll bar.

If we were exporting as PDF, we could export the tab currently displayed on the screen by selecting the Current Report checkbox…

<no audio> Click the *Current Report* checkbox.

<no audio> Click above the scroll bar.

….which disables the file selection list.

And would immediately downloads the report tab as a PDF if we clicked OK.

<display> Mouse clicks OK button.

<display> PDF opens in Adobe PDF program.

<display> PDF exits screen and display returns to Export screen.

<no audio> Click below the scroll bar.

File Type

PDF is the default but our other file type options include…

<no audio> Click the *File Type* drop-down.

…Excel, CSV Archive and Text.

We suggest sticking with either PDF or .xlsx.

<no audio> Select *Excel (.xlsx)*.

Export Excel

The default is Prioritize easy data processing in Excel, which is typically fine.

However, if we are exporting a report with Input Controls, which allow us to further filter the report output in some templates, we need to select the **Prioritize the formatting of documents** radio button.

Since it doesn't seem to affect anything, we can always select it if it makes it easier to remember.

So, let's do that.

<no audio> Select the *Prioritize the formatting of documents* radio button.

And click OK.

<no audio> Click the *OK* button.

File Download

Depending on our browser and settings, a download bar will display at the bottom of our screen and we can open or save as appropriate.

<no audio> Click to complete the file download.

<display> Excel file of WIC Type (State) tab displays.

<no audio> Click when ready to continue.

Refresh

We can also refresh the report using the Refresh icon. The drop-down arrow…

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

…displays the names of the SQL queries used to pull the data.

In general, we are going to want to refresh all.

<no audio> Click the *Refresh* icon.

The Prompts modal opens, which is just another way to enter our prompt values.

Let's run our report from 12/15 to 12/31 this time.

First, we need to select the prompt we want to adjust.

<no audio> Click on the *Enter Start Date* prompt to highlight.

Then type 12/15/20 into this field.

<no audio> Click into this field.

New Date

<no audio> Type: 12/15/20

Refresh Dates

And click the arrow to move it into the field on the right.

<no audio> Click the right arrow to move the date into the field on the right.

Click OK.

<no audio> Click the *OK* button.

Open Icon

We can also use the Open icon to open a report.

It's a little funky because…

<no audio> Click the *Open* icon.

…instead of opening a new tab, it replaces the report in the current tab, which is why this message about saving our report displays.

Add: We should always save our report anyway so that the next time it opens, it will have our agency information and the dates we last entered.

<no audio> Click the *Save* icon.

Let's click No and save our current report. Then click this icon again. Go ahead.

<display> Click anywhere for a hint.

<no audio – failure hint> Click the *No* button.

<no audio – failure hint> Click the *Save* icon.

Choose Document

Next can you open the MISSED NUTRITION VISITS template found in the INFOVIEW TEMPLATES >> Benefit folder? Go ahead.

<display> Click anywhere for a hint.

<display> Navigate using the folders in the right panel.

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

<no audio – failure hint> Double-click on *INFOVIEW TEMPLATES* on the right panel.

<no audio – failure hint> Double-click on *Benefits*.

<display> QUIRK #3 – NOTE: A double-click won't select this. We have to single click to highlight then click the Open icon.

<no audio – failure hint> Click on *MISSED NUTRITION VISITS* to highlight.

<no audio – failure hint> Click the *Open* button.

New Report Opened

<no audio> Well Done.

Notice, this report replaced the COUNT OF NEW PARTICIPANTS report we previously had opened in this tab.

If Pinned Tab

If we had opened it while displaying one of the pinned reports, it would replace that report in the tab, and look as if it were pinned, but the next time we logged in, our original pinned report would display.

Save As – You

<no audio> Well Done.

OK. So, what do we have to do to be able to run this report? Go ahead.

<display> Click anywhere for a hint.

<no audio – failure hint> Click the *Save* icon.

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

<no audio – failure hint> Click the *Save* button.

Run Report?

And to run this report, we do what?

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

Yep. Click the Prompt icon.

Let's take a look at what displays if there aren't any records for the output.

Click the pinned CERTIFICATIONS tab.

<no audio> Click the *CERTIFICATIONS CO…* tab.

No Output

We're just going to run it for the Agency, Clinic and Dates already entered into the prompts. Go ahead.

<display> Click anywhere for a hint.

<no audio – failure hint> Click the *Run* icon.

A refresh modal may display indicating its progress and the amount of time it took this report to run the last time it was refreshed.

A message will display if there isn't any data that meets the criteria specified by the prompts and queries.

<no audio> Click the *OK* button.

Nav to My Fav

Let's take a look at managing our My Favorites folder. Go ahead and navigate to it.

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

Transition Slide

<display> My Documents bar with My Favorites transitions to overview slide.

Managing My Favorites

Transition Slide

<display> Overview slide transitions to My Favorites.

Organize Favorites

Before we start, we should note that there are always multiple ways of doing things. We are going to use the menu options but we can also right-click to summon menu options.

We can organize our reports into folders if we want to.

Let's add a folder called Benefits. Click the New icon.

<no audio> Click the *New* icon.

We won't use any of the other options listed here, just Folder.

<no audio> Select *Folder*.

<no audio> Type: BENEFITS

<no audio> Click the *OK* button.

Move Report

Let's move our MISSED NUTRITION VISIT report to our new BENEFITS folder. Click on the report to highlight it.

<no audio> Click on the *MISSED NUTRITION VISIT* report to highlight it.

This enables the Organize menu option. Go ahead and click it.

<no audio> Click *Organize* on the menu bar.

We don't want a copy of it in both our My Favorites and BENEFITS folder, so we are going to select Cut.

<no audio> Select *Cut*.

Next, we need to open the folder in order to paste our report, which we can do by double-clicking either BENEFITS folder.

<no audio> Double-click on the *BENEFITS* folder in either the left or right panel.

And paste. Using the menu options, go ahead and do that.

<display> Click anywhere for a hint.

<no audio – failure hint> Click *Organize* on the menu bar.

<no audio – failure hint > Click *Paste*.

And go back to My Favorites.

<no audio – failure hint> Click on *My Favorites* in the left panel.

New Folder – You

Let's create a folder called STAFF and move the DAILY STAFF PRODUCTIVITY, RESOURCE MANAGEMENT, and STAFF & CLINIC PRODUCTIVITY reports into it. Go ahead.

<display> Click anywhere for a hint.

<no audio – failure hint> Click *New* on the menu bar.

<no audio – failure hint> Select *Folders*.

<no audio – failure hint> Type: STAFF

<no audio – failure hint> Click the *OK* button.

Multi-Select

We can multi-select by holding down the Control key.

Hold down the CTRL key while selecting the reports from top to bottom.

<no audio – failure hint> Click the *DAILY STAFF PRODUCTIVITY* report to highlight it.

<no audio – failure hint> CTRL + click the *RESOURCE MANAGEMENT* report to highlight it.

<no audio – failure hint> CTRL + click the *STAFF & CLINIC PRODUCTIVITY* report to highlight it.

<no audio – failure hint> Click *Organize* on the menu bar.

<no audio – failure hint > Select *Cut*.

<no audio – failure hint> Single or double-click the *STAFF* folder in the left panel.

Paste Multiple

<no audio – failure hint> Click *Organize* on the menu bar.

<no audio – failure hint > Select *Paste*.

<no audio> Well Done!

<no audio> Click on *My Favorites* to exit the STAFF folder.

Delete

We can delete reports we've saved to My Favorites as well.

Delete is in our Organize menu but since we've used that multiple times, let's use the right-click function this time and delete the WOMEN WITH UNLINKED OR ONE WAY LINKED INFANTS report.

<no audio> Right-click on the WOMEN WITH UNLINKED OR ONE WAY LINKED INFANTS report.

<no audio> Select *Organize.*

Delete 1

<no audio> Select *Delete*.

Properties

<no audio> Click the *OK* button.

We can also change the Properties, such as the title, of reports we've saved to our My Favorites.

Properties are found in the right-click menu.

Let's add "hyphen MONTHLY" to the title of the HEMOGLOBIN NOT DONE report.

Right-click on it.

<no audio> Right-click on the HEMOGLOBIN NOT DONE report.

<no audio> Select *Properties.*

The General Properties include the Title and a report Description, both of which we could alter if we wanted to.

Let's add our hyphen Monthly descriptor to the title.

<no audio> Click to the right of the title to insert the cursor.

Add Monthly

<no audio> Type: -MONTHLY

Save New Title

And click the Save & Close button.

<no audio> Click the *Save & Close* button.

Rename Folder

We can also rename our folders using Properties.

Let's just correct our Peer BF folder so that it's all in caps and matches the rest of our folders.

Right-click on the Peer BF folder and select Properties.

<no audio> Right-click on *Peer BF.*

<no audio> Select *Properties*.

Double-click on Peer to highlight so we can over-write it.

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

Type PEER

Type PEER in caps.

<no audio> Type: PEER

Save New Name

And click the Save & Close button.

<no audio> Click the *Save & Close* button.

Renamed

<display> Transition to next slide.

End Slide

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