

Introduction to Infoview Training Module Script

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Introduction

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

It is an introduction to Infoview for users granted access by their WIC coordinators or supervisors.

Overview

SAP Business Objects, which is software we call Infoview, allows the State to create ad-hoc reports for Local Agency, State, and WIC Program partners.

It uses the Reports Environments, which is one day behind the current information in the Production Environment.

It also retains records up to six years past their last activity date, which provides access to older records not found in Production.

Infoview & the MDH WIC Website

Infoview on Web

The Infoview page on the MDH WIC website is the go-to place to find everything we need to use Infoview.

The link is on the Reports & Data page, which is found on the left nav bar.

<no audio> Click below the scroll bar.

Left Nav

<no audio> Click the *Reports & Data* link.

Reports & Data Page

The Reports & Data page provides links to annual reports developed by the State Office. At some point, we should all take the time to tour around this page in order to really get a feel for all the data that is already available to us.

However, since our focus is Infoview, for now we'll have to be satisfied with taking a minute to view the topics and general information provided on this page.

Click the scroll bar to move down the page.

<no audio> Click below the scroll bar.

Reports & Data

<no audio> Click below the scroll bar.

<no audio> Click below the scroll bar.

<no audio> Click below the scroll bar.

<no audio> Click when ready to continue.

Scroll

<page scrolls up to Reference Documents & Infoview link>

Requests

All of our WIC partners can request data from the State Office.

If we can't find an existing report that meets our needs, we can request data, assistance with reports, or ad-hoc Infoview reports using the Local Agency Reports & Data Request form.

Whenever a report request is submitted, a small workgroup at the State determines how to best meet the needs of the request.

All reports currently available are considered, such as annual summary data on the website, monthly summary reports, and Infoview.

Go ahead and click the *Reference Documents & Infoview* link.

<no audio> Click the *Reference Documents & Infoview* link.

Infoview

And here is our link to the *Infoview* web page. Go ahead and click it.

<no audio> Click the *Infoview* link.

We may want to bookmark this page; we can google how to do that if we aren't sure how.

This page has a link to the Infoview login.

Go ahead and click below the scroll bar to view the rest of the page.

<no audio> Click below the scroll bar.

Infoview Page

Starting at the bottom...

There is a link to the Training Modules.

The *Infoview Quick Reference* provides some simple tips and addresses some common questions.

The *Infoview Report Templates – Reference* is a working document that provides summary information about all of the currently available Infoview reports. It is updated every time a report is created or revised.

Take a minute to view the reference documents. Click the links and a new browser tab will open and the module will pause.

<no audio> Click when ready to continue.

Infoview Page 1

Lastly, are the Infoview Guidance Documents. Go ahead and click on that link.

<no audio> Click the *Infoview Guidance Documents* link.

Guidance Docs

Infoview Guidance Docs provide detailed information about Infoview Report Templates and we are strongly encouraged to review the report's Guidance Document before running the Report Template in Infoview.

If we have a question about a report, we should go to the Guidance Document first...we'll probably find the answer there!

Infoview questions can also be directed to either our agency's State Consultant or to sarah.mallberg@state.mn.us.

We'll take a look at a Guidance Document in the next module.

If there is time now, we can browse through these pages. Click the link and a new browser tab will open and the module will pause.

<no audio> Click when ready to continue.

Data Security & Infoview

Data Security 1

We must always be thinking about data privacy when using Infoview.

Most of the Infoview reports provide private or personal data, such as names, addresses and telephone numbers of participants.

It is our responsibility to always act in ways that protect our participants' rights to privacy.

Data Security 2

This includes displaying reports on our computers or monitors, saving to Share drives or to a removable storage devices, such as flash drives, or printing reports.

Email

Most notably, we should never send a report with private data on it via regular or unsecured email.

Secure Email

Find out if our agency has a mechanism for sending a secure or encrypted email.

Remove Data

If we are unable to send a secure email, then before sending, we should remove personal data. Most report outputs have State WIC IDs or Household IDs in order to protect our participant's privacy.

Transition Slide

<display> Transition to Reference slide.

Reference

For more information, please reference MOM, Section 9.3 and the Security Training.

Logging into Infoview

Browsers

Any browser can be used with Infoview.

Login

The URL for Infoview is shown here (<https://infoview.mnwic.net/BOE/BI>) and if used regularly should be bookmarked in our Favorites. We can easily google how to do that if we aren't sure how to.

Our username will begin with IFV.

Username

It isn't case-sensitive and will auto-populate for future logins.

Once our WIC Coordinator or Supervisor has requested our username from the State and the State has provided it, we will have to call the Help Desk to get the temporary password before logging in.

<no audio> ifvmals1 typed into *User Name* field.

Temp Password

<no audio> Encrypted password typed into Password field.

After logging in with the temp password...

<no audio> Click the *Log On* button.

Change Password

...Infoview will require us to change the password.

<no audio> Click into the *Old Password* field.

Old PW

<no audio> Encrypted password typed into *Old Password* field.

<no audio> Click into the *New Password* field.

New PW

Infoview passwords must be at least 8 characters long and have 1 upper/lower case letter, 1 special character and 1 number.

<no audio> Encrypted password typed into *New Password* field.

<no audio> Click into the *Confirm New Password* field.

Confirm PW

<no audio> Encrypted password typed into *Confirm New Password* field.

<no audio> Click the *Log On* button.

Expired

If the browser tab has sat for too long and we try to login...

<no audio> Encrypted password typed into *Password* field.

<no audio> Click the *Log On* button.

Expired Msg

...this message will display indicating our page has expired and to log in again.

<no audio> Message: This page has expired. Enter your credentials and try again (FWC000006).

Mis-Type

If we mis-type our password...

<no audio> Encrypted password typed into *Password* field.

<no audio> Click the *Log On* button.

Mis-Type Msg

...a message displays indicating our login was not recognized.

<no audio> Message: Account information not recognized. Enterprise authentication could not log you on. Please make sure your logon information is correct. (FWB 00008)

We can type our login incorrectly 5 times before Infoview will require us to reset our password.

The system will also require us to change our password every 90 days.

Login

<no audio> Encrypted password typed into *Password* field.

<no audio> Click the *Log On* button.

Data Protection Msg

Once we've successfully logged in, a Data Protection message may display that reads – go ahead and read it:

<no audio – message> This product contains open or freely configurable entry fields, which are not intended for storing personal data without additional technical and organizational measures to safeguard data protection and privacy.

<no audio> Read message then click to continue.

A fancy way to say, always keep data privacy in mind when using Infoview.

We will do that without this reminder, so let's click the *Do not show this message again* checkbox.

<no audio> Click the *Do not show this message again* checkbox.

Data Protection Msg 1

And click OK.

<no audio> Click the *OK* button.

Home Tab

<display> The Infoview Home tab displays.

End Slide

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

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