

Using Infoview Training Module 4 Script

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Introduction

This Infoview training module is provided by the Minnesota Dept. of Health WIC Program. It provides a guidance on using reports with Input Controls, Reference tabs, and how we can modify our report outputs.

Input Controls

Overview

Input Controls are an OPTIONAL method for filtering report outputs by a field such as agency, clinic, WIC Type, etc.

They provide a subset of the original report output when run based on the prompts.

Use of Input Controls in a specific report template is indicated in its Guidance Document.

GD

<display> Pending Proof of Income, Identity and/or Residency guidance document. Highlighted: An OPTIONAL input control allows the output to be filtered by Clinic ID.

Let's open the PENDING PROOF OF INCOME, IDENTITY AND/OR RESIDENCY template found in the Agency Management folder, and save it to our My Favorites folder. Go ahead.

Save Report

<no audio> Click anywhere for a hint.

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

<display> Use the right panel to navigate.

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

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

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

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

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

Agency Prompt

It's February 2021 and we want to see who was certified during January with a pending proof. We'll use the information for a call or text to remind the participant or proxy that we will need them to provide the proof so that we can issue more benefits.

This time, we are going to run it for agency 241 and January 2021.

What's the first thing we'll need to do? Go ahead.

<no audio> Click anywhere for a hint.

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

<no audio> Double-click on 161 to highlight it.

Start Date

<no audio> Click at end of date and...

Start Highlight

...we'll drag to highlight it.

Enter Start

<no audio> Type: 1/1/21

End Date

<no audio> Click at end of date and...

End Highlight

...we'll drag to highlight again.

Enter End

<no audio> Type: 1/31/21

Run Report

<no audio> Click the *Run* button.

Input Icon

The Input Control icon is directly above the User Prompts icon. Click it.

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

Types of Input

There are two types of input controls: Document and Report.

A Document input control affects all tabs in the report.

A Report input control affects a specific tab.

If there is only one tab in the report, either type might be used and they will automatically display when the Input Controls panel is opened.

This report has an input control that filters the output by Clinic ID.

Currently, the report provides information for all clinics.

We can see that the first page has information for clinic 89.

And the second page...

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

Next Page

...has clinic 091 and the last page...

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

...has clinic 092 and 093.

If we only wanted a participant list for clinic 092, we would de-select the Select All checkbox...

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

...which clears the output.

Then select clinic 092...

<no audio> Click the *092* checkbox.

Clinic 092

...and the output is filtered to only include clinic 092.

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

<no audio> Click below the scroll bar.

If we wanted both clinic 092 and 093, what do you think we do? Go ahead.

<no audio> Click the *Clinic 093* checkbox.

Clinic 093

<no audio> Click below the scroll bar.

Yep. Simply select the checkbox.

If we save the report with the current input controls selected...

<no audio> Click the *Save* icon.

<no audio> Click the *Close* icon on the PENDING PROOF OF... tab.

Saved Input

...the next time we open it from our My Favorites folder...

<no audio> Click the *Documents* tab.

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

<no audio> Double-click the *PENDING PROOF OF INCOME, IDENTITY AND/OR RESIDENCY* report.

Re-Open Report

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

...it will have saved the last selected input controls.

This input control is pretty self-explanatory.

But, let's take a look at another report.

Reference Tabs & More Input Controls

Report #2

We've already saved the Note Audit report to our My Favorites folder, which is why the prompts are available.

Let's also take a look at its Guidance Document.

Remember where we can find it? Go ahead.

<no audio> Click anywhere for a hint.

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

<no audio – failure hint> Double-click the *Note Audit Guidance Document*.

Guidance Doc

Go ahead and read through the first page or so of the document.

<no audio> Click the scroll bar to continue.

Scroll

And let's scroll down to the PROMPTS table.

Prompts Table

Besides running this report for the agency and dates where the cert was performed, benefits issued and midcert were completed, we can also run this report for specific notes by entering the Notesubjectid.

Go ahead and close this tab when ready to move on.

<no audio> Click the X to close the Guidance Document.

Reference Tab

For reports that use IDs, like this one, the first tab is a Reference tab.

Go ahead and click on it.

<no audio> Click the *Reference* tab.

If the IDs are specific to an agency, such as IDs for different appointment types, the report can be run for our agency without completing any of the other prompts in order to refresh the IDs so that they reflect those that belong to our agency.

Refresh IDs

However, the Note Subject ID is the same regardless of agency so we may just want to refresh it in case any new IDs have been added since the last time the report was run.

<no audio> Click the *Run* button to refresh the IDs.

This message simply indicates that there weren't any records that met these queries' criteria.

We can simply click OK

<no audio> Click the *OK* button.

Note Subjects

We are going to run this report for the same Note Subject IDs, which means we'll run the report for the following kinds of notes: SOAP, Cert Info/Nutrition Education notes...

<no audio> Click below the scroll bar.

...high risk follow-up, high risk...

<no audio> Click below the scroll bar.

<no audio> Click below the scroll bar again.

Note Subject 1

...and the Separation of Duties-Reviewed and Income notes.

Agency 2

Let's run this report for agency 241 and January 2021.

<no audio> Double-click on 201 to highlight it.

Agency 2A

<no audio> Type: 241

Start Date 2

<no audio> Click at end of date and...

Start Highlight 2

...we'll drag to highlight it.

Enter Start 2

<no audio> Type: 1/1/21

End Date 2

<no audio> Click at end of date and...

End Highlight 2

...we'll drag to highlight again.

Enter End 2

<no audio> Type: 1/31/21

Run Report 2

<no audio> Click the *Run* button.

Input 2

Go ahead and click the Certs or Recerts tab.

<no audio> Click the *Certs or Recerts* tab.

Remember, the Guidance Doc indicated there were Input Controls. Let's take a look at them. Go ahead.

<no audio> Click anywhere for a hint.

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

Since it's a Report input control, we know that it only affects the current report tab.

But what it does is a little less obvious.

Hover

We can hover over the description to view more details.

<no audio> Hover over the Input Control description for more details.

<display with hover> Increase or decrease a number in increments. Description: Number of days between the date certs/recerts and the date the note was written (the number of days is greater than or equal to the input control value).

<no audio> Click me to continue.

Output2

This provides a list of participants by staff ID whose notes were written on a date **after** their contact and the Input Control affects the number of days between, which is currently the default of 1.

Let's take a quick look at the report output.

<no audio> Click below the scroll bar.

<no audio> Click below the scroll bar.

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

Increase Input

Our output has a bunch of notes written one day after and some that were 4 (at least so far).

What if we are only interested in those notes written 2 or more days after?

Then we'd increase the input control. Click the Increase arrow.

<no audio> Click the *Increase* arrow.

And our output, in this tab, is filtered for only those records.

<no audio> Click below the scroll bar.

Let's look at the MCAs tab.

<no audio> Click the *MCAs* tab.

Report Input Control

Since this uses Report Input Controls, only the individual tab is affected by changing the value.

Let's take a look at one more example of an input control.

Example 3

We've closed the last report, saved the INFANTS BY AGE ISSUED BENEFITS FOR SPECIFIED PARTICIPATION MONTH report to our My Favorites folder, and run it for our agency and the participation date of 202101. As well as opened its guidance document.

Let's take a quick look at that.

<no audio> Click the *Guidance Document* tab.

Guidance Doc 3

Go ahead and click through it, reading the pertinent info in the first two pages and closing the tab when done.

<no audio> Click below the scroll bar.

<no audio> Click the X to close the Guidance Document tab.

Input 3

OK. Now go ahead and open the Input Controls panel.

<no audio> Click anywhere for a hint.

<no audio – failure hint> Click the *Input Controls* icon directly above the *Prompts* icon.

Slider Input

This is a slider input control that filters based on the infant's age in months.

If we only wanted a count of infants between 6 and 12 months old, we'd click and drag the left slider to 6. Let's do that.

<no audio> Click and we'll drag the slider to the right to 6.

Slider

<display> Mouse drags slider to 6.

New Input 3

The report refreshes to display only 6-12 months

<no audio> Click below the scroll bar.

Let's take a look at the Infant List tab.

<no audio> Click the *Infant List* tab.

Document Input

Since this is a Document input control, it affects both report tabs.

Let's save the report and export it. Go ahead.

<no audio> Click anywhere for a hint.

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

<no audio – failure hint> Click the *Export* icon (paper with right-angle arrow).

Export 3

And let's export to Excel (.xlsx).

<no audio> Click anywhere for a hint.

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

<no audio – failure hint> Select *Excel (.xlsx)*.

<no audio – failure hint> Click the *Prioritize the formatting of document* radio button.

Did You Remember?

Did you remember to click the *Prioritize the formatting of document* radio button?

Prioritize

This is necessary to ensure the export includes the filtered output.

Let's move on and talk about modifying our report output.

<no audio> Click the *Cancel* button.

End Section 3

<Transition Slide>

Modifying Report Outputs: Design Mode

Modify Overview

We can make small simple modifications to our report output in Infoview, including: deleting a column, changing the column header and changing the title of the output, and changing the tab title.

Modes

Currently, we are in the Reading mode and we never have to be in any mode other than Reading unless we want to make changes to our report output.

The Design mode is where we can do that.

Go ahead and click the button.

<no audio> Click the *Design* button.

Design

The Design mode still has access to those functions that we've used, including the Input Controls, Prompts, Save, Export and Refresh.

And a lot more icons and functions, many of which can only be used by report designers.

However, the we just need our report.

Let's delete a column. For instance, let's say we don't care about the Printed FDTU.

We are going to remove it using the currently disabled Remove icon.

Click on the column header to select it...

<no audio> Click on the *Printed FDTU* column header.

Remove Icon

This enables the Remove icon. Go ahead and click on it.

<no audio> Click the *Remove* icon.

Since we clicked the header, Infoview doesn't know if we want to remove the row or the column. Select column.

<no audio> Select the *Column* radio button.

And click OK.

<no audio> Click the *OK* button or press the Enter key on the keyboard.

Undo Icon

We can reverse our change by using the Undo icon.

<no audio> Click the *Undo* icon.

We can also remove the column by clicking on the column itself, instead of the header.

The difference is that it knows it's a column and immediately deletes it.

Column Header

We can also change the name of a column. For instance DOB to Date of Birth.

To do this, double-click the header text.

<no audio> Double-click on DOB in the column header.

Notice that it also displays in the formula bar where we could make our change as well.

Another note: we will need to press the **Enter** key on our keyboard to make the change once we've revised our text.

DOB

<no audio> Type: Date of Birth and press the Enter key.

Change Title

We can also change the title of this report tab. Let's say we want to add "in Months" after the word "Age".

Double-click on the title.

<no audio> Click on the report title.

Again, we could change it in the formula bar as well.

This title has a formula, and most don't, so it looks scarier than it actually is.

Formulas

Formulas are often used to display dates and other information.

The quotation marks surround actual text that will display and the formula is used to format the display of the participation month we entered into the Prompts, in this instance January 2021.

Age

Click inside the highlighted text next to the word “Age” to insert the cursor and we’ll type our additional text.

<no audio> Click next to the word “Age” to insert the cursor.

Type Text

<display> “in Months” typed after word Age in title.

Enter Key

And, like before, we have to press the Enter key on the keyboard to finish our title change. Go ahead.

Tab Name

Last change we’ll make is to the tab name.

For instance, let’s change it to 6-12 Mo. Infants to reflect the changes we made to our output.

Go ahead and double click on “Infant List” in the tab...

<no audio> Double-click on *Infant List* in the tab.

...and then type the new tab name.

Type Name

<no audio> Type: 6-12 Mo. Infants

Enter Key Again

And, as before, press the Enter key on the keyboard to finish. Go ahead.

Save New

Let’s save our new version of the report output, close it and re-open it. Go ahead.

<no audio> Click anywhere for a hint.

<no audio – failure hint> Click the *Save* icon (looks like a floppy disk).

<no audio – failure hint> Click the *X* on the INFANTS BY AGE ISSUE... tab to close it.

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

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

<no audio – failure hint> Double-click the INFANTS BY AGE ISSUED BENEFITS FOR SPECIFIED PARTICIPATION MONTH to open it.

New Version

<display>

- 1 – input control at 6 months.
- 2 – deleted Printed FDTU column change.
- 3 – renamed Date of Birth column header.
- 4 – revised report tab title.
- 5 – revised tab name.

Sessions & Logging Off

Sessions

Infoview allows up to 60 minutes of inactivity before timing out.

A message will start displaying 5 minutes before our session is going to time out, with an option to continue, counts down until the hour has expired and then displays the Timeout message.

If this occurs, click OK and Log off. We can always log back in.

Transition Slide

<display> Transition from Session Timeout message back to INFANT BY AGE ISS... tab.

Random Error

Depending on what we are working on, inactivity for an extended period may result in random errors displaying.

They can be kind of intimidating but if an error like this occurs simply click OK, log off and log back in.

Log Off

Once we are done using Infoview, we should always log off by clicking Log Off...

<no audio> Click *Log Off*.

...wait for the system to perform its clean-up process.

<display> “ The cleanup is in progress. Wait...”

Once it returns to the login screen, we can then close the browser window.

<no audio> Click the X to close the browser window.

End Slide

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

Minnesota Department of Health - WIC Program 85 E 7th Place, PO BOX 64882, ST PAUL MN 55164-0882; 651-201-4444, health.wic@state.mn.us, www.health.state.mn.us; To obtain this information in a different format, call: 651-201-4444