

Infoview Quick Reference

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Saving Reports

You must save the Infoview Report Templates to your My Favorites folder before using.

- Double-click on the report template to open
- Click the **Save** icon to *Save As*
- Click the **Favorites Folder bar** to expand
- The **Favorites Folder** is auto-highlighted in the left panel
- To save to another folder, double-click the **Favorites Folder** to expand and click the desired folder
- Click the **Save** button

Adding Folders

You can organize your reports in your My Favorites folder by adding folders.

- Click **New** on the menu bar
- Select **Folder**
- Type the **name** of your folder into the **Create Folder** modal and click the **OK** button

Report Prompts

If the prompts do not immediately display when the report is opened, you may need to select the **User prompt Input** icon on the left navigational bar.



Dates

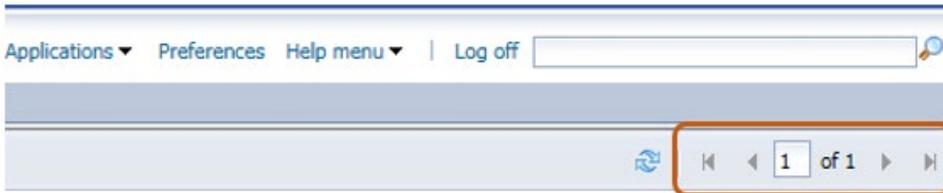
- Timestamps should not be **entered into** date fields since the system will not recognize them and it will cause the report not to work correctly. Date formats are indicated in the prompt description or the Guidance Document. Some dates are entered as **mm/dd/yy** and some as **yyyymm**.
- If the system defaults a timestamp after a report is run, it does not need to be deleted to run it for the same dates.
- Do NOT use the calendar controls for date PROMPTS. These auto-insert timestamps and the report will error out.

Multiple Values

If a prompt allows multiple values, use a semi-colon to separate the values and **no spaces** (ex: 111;112;113).

Folders

All folders display a maximum of 50 reports or documents. If more than 50 exist, the folder will have multiple pages, which are accessed at the top right of the menu bar.



Reports

If report outputs have multiple pages, page arrows display on the bottom right of the screen.



Outputs



The output icon opens a modal that allows you to select how you want to export the report. The default is PDF. Two notes:

- **Exporting to CSV:** is **not recommended** since most reports have formulas that do not convert correctly in the CSV format.
- **Exporting reports with Input Controls to Excel:** you may need to select **Prioritize the formatting of documents** radio button on the Export interface for the output to display correctly based on the selected Input Control options.

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