

Infoview Training 1: Overview of Reports and Navigating 4.3

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Introduction

Intro

This Infoview Training 1 module provides an overview of Minnesota WIC reports and navigating Infoview 4.3. It is provided by the Minnesota Department of Health WIC Program.

Overview

What is Infoview?

Infoview is a browser-based software that allows the state to create ad-hoc report templates that can be used by local agency and state WIC staff for management, auditing, outreach, etc.

The majority of the existing report templates, of which there are many, were requested by local agencies.

Reports environment

Infoview uses the information system's reports environment, which is one day behind the current information in the production or clinic environment. So, anything inputted in WINNIE today will show up on a report output tomorrow.

The reports environment maintains data for six years, allowing access to older records not found in Production. The one caveat is for appointment information. That is only retained in the database for 90 days.

Data privacy

Many of our Infoview report templates provide private or confidential data.

The Security Training should be reviewed prior to first using Infoview, and annually as required by policy, for reminders about how to protect our participants' information and ensure we keep it private.

Click the button to view the Security Training modules.

<https://www.health.state.mn.us/people/wic/localagency/infosystem/hubert/training/index.html#securitytraining>

When ready, return to the module and click the continue button.

Other reports

Reports & Data webpage

Other reports and data can be found on the MDH WIC website.

The Reports & Data page provides public data that can be shared with partners outside of WIC.

Click the button to view this page in a new browser window.

<https://www.health.state.mn.us/people/wic/localagency/reports/index.html>

When ready, return to the module and click the continue button.

Local Agency Portal webpage

The Local Agency Portal SharePoint site provides data with small numbers and private data where individual participants could be identified.

These data must not be shared with non-WIC persons.

To view these data, agency coordinators must request access for their users.

Click the button to view the Local Agency Portal webpage with more information.

<https://www.health.state.mn.us/people/wic/localagency/portal.html>

When ready, return to the module and click the continue button.

Local agency requests

If we don't see what we need, we can use the Local Agency Reports & Data request to ask for a new ad-hoc template, modifications to current templates, or to ask report questions to the state office.

Click the button to view the request form.

<https://redcap.health.state.mn.us/redcap/surveys/?s=PFX4JEF83F>

When ready, return to the module and click the continue button.

Infoview and website

Other information about Infoview can also be found on the MDH WIC website.

Click the button to view the Infoview webpage.

<https://www.health.state.mn.us/people/wic/localagency/reports/infoview.html>

When ready, return to the module and click the continue button.

Logging in

Logging in.

<no audio> Slide transitions from section slide to topic slide.

Browsers

We can use any browser with Infoview.

Click the button to continue.

<no audio> Google Chrome, Microsoft Edge, Mozilla Firefox.

URL

The Infoview URL is at the top of the Infoview webpage, and we should bookmark it once we start using Infoview.

Click the button to continue.

Username

Our Infoview username begins with IFV and is not case-sensitive.

We're going to use ifvtrain (which does not follow our username convention).

Go ahead and click the User Name field.

Username 1

Type, using lowercase: ifvtrain.

Temp password

The very first time we login, we will have to get the temporary password from the MN Help Desk.

Once we enter the temp password...

<slide transition> Slide transitions to Change Password page.

Temp password 1

...and click the Sign in button, go ahead and do that...

<no audio> Click the Sign in button.

Browser save passwords

...the system will require us to change it.

If the browser asks whether we want to save our password, we must always select never.

It is a huge security risk to have our passwords saved in a browser, especially considering the amount of private data available in Infoview.

Go ahead and click Never.

<no audio> Click the Never button.

Change temp password

Once we've entered the temp password, our new password and confirmed it...

<slide transition> Slide transitions to completed fields.

Change temp password 1

...and click the Sign in button again...go ahead.

Passwords

We return to the main login page to complete our login with our own password.

Infoview automatically displays our username on the login page.

Click the button to continue.

Passwords 1

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

The system will require we change our password every 90 days.

Click the button to continue.

Incorrect login

An authentication error displays if we incorrectly type our login.

<transition slide> Slide transitions to topic slide.

Incorrect login 1

After 5 incorrect attempts, Infoview will require us to reset our password.

If we forget our Infoview username or password, we should call the MN Help Desk.

The state office cannot assist us.

Security and audit requirements mandate that our Maintenance and Operations contractor maintain Infoview usernames and passwords.

Click the button to continue.

Contact admin link

The Contact Administrator link simply opens a blank email.

And we can use this link to send an email to the MN Help Desk.

Login

OK. We are ready to open Infoview.

Click the Sign in button one more time.

<no audio> Click the Sign in button.

<Waiting>

<no audio> Blue waiting icons display.

<Transition slide>

<no audio> Slide transitions from Infoview home page to section slide.

The home page

<no audio> Slide transition from section slide to Infoview home page.

Icons on right

Infoview opens to the home page.

Let's start with the icons at the top right.

These display on every page within Infoview.

Depending on the size of our monitor and our zoom, these icons either show on each page or are tucked under the horizontal ellipses, or More icon, which we'll see throughout Infoview.

We have Search and Refresh, which we'll use, and Notifications and Web Assistant, which we most likely won't.

Click the blue circle with our initials, ST.

Settings

This is where we go to logout.

Otherwise, settings is probably the only thing we'll use. Select that.

<no audio> Select Settings from the menu.

Change password

This is where we can change our password after logging in.

The Account and Application Preferences have already been set to try to provide the best user experience.

However, we can personalize it by changing the color scheme.

Click on Appearance.

Appearance

We have options.

Go ahead and click the Cancel button.

Home page overview

The home page has three sections.

The Folders tile is where reports are stored, and the Recycle Bin contains our deleted reports.

The second section provides immediate access to reports we've marked as Favorites and the third is access to reports we've used lately.

Above the pale blue line is our click navigation for this page.

Click on Favorites then Recent Documents.

Favorites

<no audio> Favorites section slides up and over Folders/Recycle Bin section.

<no audio> Click on Favorites then Recent Documents.

Recent documents

<no audio> Recent Documents section slides up and over Favorites section.

Hover title

The tiles show report titles, some truncated, and when the report was last run and the new output saved.

To view longer titles, we have to hover.

Go ahead and hover over the title on each tile then click the button to continue.

<no audio> Hover over the title on each tile.

Tile icons

The Web Intelligence icons indicate these are all report tiles.

We saw the More icon earlier, and as promised, here they are again.

Hover over the More icon on the fourth tile then click the icon.

More list

There are a lot of options here that we aren't going to use.

And some are only available for reports we've saved to our personal folders.

Templates

Before we go any further...let's talk templates.

Templates are all the possible reports that we could use.

They are shared by all users and can be run but not saved or edited in any way.

Templates can only be saved as a copy to our personal folders.

These saved copies are the Infoview reports we want to use regularly.

And we'll see all of this in the next module.

Click the button to continue.

More list 1

Back to the menu.

This home page menu provides easy access to different things we can also do on other pages in Infoview.

Go ahead and select View.

Navigation

<waiting><no audio> Blue waiting icons display.

Reports open in Reading mode.

While working in Infoview, we want to use its navigation icons and never the browser navigation.

Go ahead and hover over the nav icons then click either one to return to the home page.

View maintained

Infoview maintains our current home page view until we change it again or our session ends.

<no audio> Slide transitions from home page to log out message.

Sessions

Sessions are 30 minutes, per security requirements, and the system will ask to log us out after 30 minutes of inactivity.

It will count down for 5 minutes and if we don't click either Continue or Log Off, it automatically ends our Infoview session and logs us out.

<no audio> Slide transitions from Session Timeout Warning message to Session Expired message.

<Transition slide>

<no audio> Slide transitions from Session Expired message to home page.

Open report

We can also single click a report tile on the home page to open it.

Click the second tile, DAILY APPOINTMENTS BY.

<no audio> Click the DAILY APPOINTMENTS BY tile.

Go back

<no audio> Blue waiting icons display.

Go back to the home page.

Expand sections

Click Home on the toolbar to re-expand our sections.

Expand sections 1

<no audio> Sections expand to show Folders/Recycle Bin and Favorites again.

More menu

Let's click the More icon on the CONFIRMED APPOINTMENTS tile.

More menu – templates

Notice it's slightly shorter.

Both state templates and reports we save to our personal folders display under Recent Documents once opened.

State templates cannot be modified or deleted, which is why this menu has neither option.

Let's click on Details.

<no audio> Select Details from the menu.

Details

This has read-only info that we can find a number of other places, but of interest may be who owns it, which is not us and the folder path of Public Folders and Infoview Templates.

Click the Close button.

Properties

Open the More menu again for CONFIRMED APPOINTMENTS and select Properties.

<no audio> Click the More icon on the CONFIRMED APPOINTMENTS tile then select Properties.

Properties 1

<no audio> Click the More icon on the CONFIRMED APPOINTMENTS tile then select Properties.

Properties 2

Properties are editable as long as it's a report we've saved to our personal folders.

Properties 3

It's where we can change the titles and provide our own descriptions of our reports if we want to.

One caveat: templates may appear editable...but they aren't because only the state office template designers can edit template properties.

Click the button to continue.

Delete

This time click the More icon on the APPOINTMENTS WITH CLINIC tile.

Delete 1

And click Delete.

<no audio> Select Delete from the menu.

Delete 2

The message reads: This will delete the file. Do you want to proceed?

Delete isn't an option in the More menu for templates because we aren't just deleting it from the Recent Documents list; we are deleting the report from our personal folders.

Let's save that for later. Click Cancel.

<no audio> Click the Cancel button.

View all

The number of tiles that display on our home page is dependent on our zoom.

If the number of reports exceeds our tile real estate, we can click the View All Recent Documents button.

Go ahead and do that.

View all 1

If there are more recent documents, we can see them here.

The list view on this page looks like most other pages in Infoview.

Again, we have the More icons, as well as a couple of new ones on the top right, which we'll see on other pages as well.

Let's see what they do.

Go ahead and hover over the two new icons then click the Export icon.

Export list

Click the Recent Documents download button.

Export list 1

It literally exports our Recent Documents list.

Not much reason to do this here, but it could come in handy if we wanted a list of reports in our personal folders or maybe a list of all the available appointment templates.

Click the button to continue.

Grid

Now click the Grid icon.

Grid 1

We can view any page in Infoview as tiles instead of lists.

Hover over the same icon then click the List View icon.

Multi-select

All list pages have a multi-select column, which works with the More icon in the toolbar.

Hover over the checkbox in the header then click it.

Multi-select 1

As soon as we select a checkbox, the More icon in the toolbar becomes enabled and allows us to perform the available options on all selected reports.

Favorites

We can also mark reports as favorites, and we saw that option in our More menu.

The star indicates a favorite and all list pages have a column that allows us to easily mark them.

Let's make the first DAILY APPOINTMENTS report a favorite.

Click the star column in the first DAILY APPOINTMENTS row.

Favorites 1

<no audio> Star inserted into column.

Now let's return to the home page. Go ahead.

Refresh

We've made some changes.

We opened two different reports and marked one as a favorite.

The home page auto-refreshes when we run reports or mark as favorite in our folders, just not when navigating around like we've done so far.

Let's use that refresh icon to update our page.

Favorites 2

The Favorites section is similar to pinning a report to our home page allowing quick access to reports we like or want to use often.

Favorites 3

Like Recent Documents, once we exceed our tile real estate, a button is added so that we can view all our favorites.

Click the button to continue.

Favorites 4

To remove a favorite, we can simply click on the star wherever we see it or use the More menu.

Go ahead and hover over the star on either DAILY APPOINTMENTS tile, click it, and remove it from Favorites.

Favorites 5

<no audio> Hover over the star on either DAILY APPOINTMENTS tile, click it, and remove it from Favorites.

<Waiting>

<no audio> Blue waiting icons display.

Recycle bin

Lastly, the Recycle Bin stores deleted reports for 30 days.

Go ahead and click on the tile.

<no audio> Click the Recycle Bin tile.

Recycle bin 1

It simply lists the reports and when they were deleted.

Let's see what our options in the More menu are.

Go ahead and click on it.

<no audio> Click the More icon in the PROOF OF INCOME row.

Recycle bin 2

This time, our options are to undo our delete, view read-only properties with what, when, and where the report was deleted from, or remove the report from the recycle bin.

Exit slide

This concludes our overview and review of navigating Infoview 4.3.

In the next module, we will look at search, folders, templates, and reports.

Click the button to continue.

End Slide

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

Minnesota Department of Health - WIC Program, 625 Robert St N, PO BOX 64975, ST PAUL MN 55164-0975; 1-800-657-3942, health.wic@state.mn.us, www.health.state.mn.us; to obtain this information in a different format, call: 1-800-657-3942.

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