

Infoview Training 3: Prompts and Running Reports

OCTOBER 2025

Introduction

Intro

This Infoview Training 3 module provides an overview of prompts and running reports. It is provided by the Minnesota Department of Health WIC Program.

Today's date

Today's date is October 13, 2025.

<no audio> Slide transitions from section slide to reports interface.

Review

In the last module, we started looking at the interface for running reports and covered opening closed reports and using the BI Launch Pad to re-open current reports, pin reports, and close reports.

Now we're going to get into the good stuff.

Click the button to continue.

Intro to prompts

<no audio> Slide transitions from topic slide to report output.

Output

In the last module, we opened this report from the INFOVIEW TEMPLATES folder, and the output displays the results from the last time the template was saved by a report developer.

The Run Date always displays the current date, this does not mean that the output has been refreshed.

And even though this is a template, we can still run it.

We do that using the Query icons.

Go ahead and hover over the Query icons then click the left refresh icon.

Prompts

The Prompts modal opens.

<no audio> Slide transitions to Agency 161 prompts.

We are going to run this report for Agency 161, clinics 229 and 061-063, for tomorrow, October 14, and for our own local use answers.

<no audio> Slide transitions to Agency 241 prompts.

Prompts 1

Since templates are designed for everyone, prompts allow us to individualize the outputs, most commonly by entering our agency ID and some type of date(s).

In general, these are required and can be updated to reflect the information we want before running the report.

Search prompts

The Search above the prompts filters the prompt list.

For instance, if we start typing agency...we're left with just the agency prompt.

Since we rarely have more than 4 or 5 prompts, we probably won't use that (but now we know what it does).

Go ahead and click the x in the Search field to reset the prompts.

Left panel

Infoview auto-selects the first prompt and its values display on the right.

The prompt text tells us what we should enter and sometimes the format.

The number of values currently entered into the prompt is in parentheses.

Hovering over a prompt provides some extra details.

The important thing to note is that where the data is from looks like it could be a table but is actually the name of the query used to pull that data.

Right panel

The left panel is read-only and reflects the values we select or enter in the right panel.

Radio buttons display when only one value can be entered.

If we scroll, or since we can't scroll in our training module, click below the scroll bar twice...go ahead...

<no audio> Click below the scroll bar.

Scroll down

<no audio> Click below the scroll bar.

Enter values

...we can see that 241 is selected in the Agencyid list.

We are going to run this report for agency 161 and there are a couple of ways to enter our values.

Obviously, we can scroll and select from this list.

We can also type it. So, let's do that.

Click into the text field and type 161.

Enter agency

<no audio> Click into the text field on the right and type: 161.

Enter agency 1

<no audio> Click into the text field on the right and type: 161.

Enter agency 2

<no audio> Click into the text field on the right and type: 161.

Add options

Now, we can either click the + icon or select + 161 (manual entry) from the list.

Go ahead and do one or the other.

<no audio> Click the + icon or select + 161 (*manual entry*) from the dropdown.

Add prompt

Infoview auto-selects 161 from the list of Agency IDs and enters it as the prompt value.

Click the button to continue.

Reference data

Many of our reports, like the one we're working with, have prompts that require values we may not know off-hand.

With this type of report, we always have a Reference tab.

If the values are specific to our agency, as in the case of local use answer IDs or referral IDs we must first enter our agency into the prompt, refresh the report and review the Reference tab for the values we need.

If the values are the same for all agencies but need to be looked up, such as note subject IDs or food and formula IDs, we can simply run the report to refresh it **without** entering our agency ID first.

Click the button to continue.

Local use

Unlike most reports that require IDs, for many of the updated local use reports, the Answer IDs are optional, although completing the prompt is still required, and we'll look at how to run these reports without entering Answer IDs in a little bit.

A reference document is available on the Infoview webpage: [Using Reports with Local Use Answers](#).

Click the button if interested in reviewing the doc.

<https://www.health.state.mn.us/docs/people/wic/localagency/infoview/locuseanswers.pdf>

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

Run report

This report has local use answers, and the numbers entered into the prompt are specific to agency 241.

If we want to run it for our local use question, we have to run it for our agency to get our IDs.

Hover over the Run button then click it.

Refresh document

<no audio> Status bar displays.

Click the button to continue.

Navigating outputs

<no audio> Slide transitions from topic slide to report output.

Query message

Since we ran this for agency 161 but with clinics that belong to 241, a message displays telling us that Infoview was unable to pull data for the Appointments query, which is why the output on this tab is blank.

We don't have to, but we're going to...click the X in the message to close it.

Report tabs

All of our report tabs, which are different outputs, display above the report.

The underlined tab is what we are looking at.

To change tabs, we simply single-click on the desired tab.

Click on Reference – Answer IDs.

Vanishing toolbar

We navigate and change the view of report tab pages using the vanishing toolbar, which displays when the tab first opens then disappears after about 3 seconds.

It displays whenever we hover over the bottom of the screen.

Hover so that the toolbar displays then click the pin icon on the far right of the toolbar.

<no audio> Hover over the bottom of the screen and click the pin icon on the far right of the toolbar.

Vanishing toolbar 1

Like reports, the toolbar will stay pinned for our future sessions.

Hover over each icon on the toolbar then click the last page icon.

<no audio> Click the last page icon.

Write down answers

The IDs we need are on this page.

For local use reports, the answers are grouped by question, and we should always use answers that fall under the same question.

We are going to jot down the 4-digit IDs for each category with the answer of YES.

Click the button to continue.

Prompts continued

<no audio> Slide transitions from topic slide to report output.

Open prompts

We want to update our prompts. Where do we go? Click anywhere for a hint.

<no audio> Where do we go to update prompts? Click anywhere for a hint.

<audio – hint> Click the refresh icon in the Query section of the tool bar.

Update prompts

We need to change the clinic IDs to our agency's, change the date, and enter our Answer IDs.

Let's start with clinics.

Click the Clinic IDs prompt to select it.

<no audio> Click the Clinic ID(s) prompt to select it.

Multi-select checkboxes

Checkboxes display when we can enter more than one value, and again...

Scroll down

...if we were to scroll, we'd see all our current clinics are selected by default.

Scroll down 1

Click the button to continue.

Deselect clinics

If we were to type our new clinic IDs into the text field, since it allows multiple values, it would add anything we typed to the clinics currently listed for the prompt.

To get rid of the current values first, we can click the checkbox to manually deselect them.

Go ahead and deselect clinic 92.

<no audio> Click the checkbox to deselect Clinic 092.

Deselect all

Or we can deselect all by clicking the Reset prompt values icon.

Hover over the icon then click it.

<no audio> Hover then click.

Server order

The icon next to the prompt becomes a warning sign and the Run button is disabled until all prompts are again complete.

Notice the odd order of the clinic IDs (called Servicesiteid in the database).

We can change the default order by clicking the Server Order icon.

Hover over the icon then click it.

<no audio> Hover then click.

Sort order

Let's select Sort descending.

Sort descending

Notice the icon has changed to indicate descending.

Hover over the Sort icon again then click below the scroll bar and select 229.

<no audio> Hover over the Sort icon, click below the scroll bar, and select clinic 229.

Select clinic

<no audio> Hover over the Sort icon, click below the scroll bar, and select clinic 229.

Search clinics

For the other clinic IDs, we're going to use the Search.

Click into the text field and type: 06

Enter clinic

<no audio> Click into the text field and type: 06

Enter clinic 1

<no audio> Click into the text field and type: 06

Search clinics 1

We can click either the Search icon or select 06 (search) from the dropdown.

Go ahead.

<no audio> Click the Search icon or select + 06 (search) from the dropdown.

Select clinics 1

Our descending order is maintained.

Select clinics 063, 062, then 061.

Select clinics 2

<no audio> Select (in order) clinics 063, 062, then 061.

Select clinics 3

Done.

Click the button to continue.

Date prompts

<no audio> Slide transitions from topic slide to report output.

Dates

Moving on to dates.

This report is relatively unique in that it only requires one date.

<no audio> Slide transitions from Prompts modal to topic slide.

Entering dates

We enter a date range in most reports.

If we want only one date, we can enter the same date in both date fields.

In general, prompts tend to be standard in that they usually read Enter Start Date and Enter End Date.

This allows us to input dates from multiple tables without entering multiple dates.

We can always use the short date format.

Click the button to continue.

Dates 1

Select the date prompt.

Dates 2

The dates listed are all the dates stored in the database for the table and fields were pulling dates from.

The server order is the default.

Let's sort the list by ascending order.

Go ahead. Click anywhere for hints.

<no audio> Change the sort order to ascending. Click anywhere for a hint.

<audio - hint> Click the “hatchmark” icon above the list and directly across from Appointmentdate.

Dates 3

<no audio> Change the sort order to ascending.

Appointment dates

Earlier we mentioned that appointment reports can only be run for the past 90 days.

And now we see this in action.

Our available appointment dates start on today’s date 3 months ago.

Just like other prompts, we can type our date into the text field.

However, never add the time.

Depending on where the date is being pulled from, time can be stored down to the millisecond.

And if we enter a time, we won’t get results.

And as we can see, Infoview automatically adds the 12AM timestamp.

We can also select the date using the calendar icon.

Hover then click.

<no audio> Hover over the calendar icon then click it.

Calendar

The calendar defaults to the current month and year.

Just like when typing a date, we are going to disregard the time component.

There are a number of ways to navigate to our desired date.

Click where the arrows indicate to get familiar with the calendar.

Calendar 1

<no audio> Click where the arrows indicate to get familiar with the calendar.

Calendar 2

Select the 14th and click OK.

<no audio> Select the 14th and click the OK button.

Calendar 3

<no audio> Select the 14th and click the OK button.

Date 4

Click the button to continue.

Answer ID prompts

<no audio> Slide transitions from section slide to prompt modal.

Answer IDs

Select the Answer IDs prompt.

Answer IDs 1

Not what we were expecting?

With **optional** local use answer reports, we do some manipulation of the data in the query so that the reports work as desired.

What that means is that this field displays different data here than in the output.

If we don't like looking at it, we can use this icon to hide it.

Hover over the icon then click it.

<no audio> Hover then click.

Hide prompt list

Instead, it shows the current list of answer IDs, which we can remove individually by clicking the x icon in each row.

Go ahead and delete the first two rows using the x icon then click the Reset prompt values icon to delete the rest of them.

<no audio> Delete the first two rows using the x icon (starting at the top) then click the Reset prompt values icon to delete the other values.

<audio – hint> Click the icon to the left of the gear icon in the header of the right panel.

9999999

What if we don't use local use questions or don't want any local use answers in this report output?

Can we still use it? Because the prompt is still required.

Well, we can enter a value that isn't associated, and won't ever be, with any local use answers.

The number is 9999999 (seven nines).

Let's do that.

Click into the text field and type seven 9s.

Enter 1-7 nines

<no audio> Click into the text field and type seven 9s.

9999999 prompt

Add the 7 nines to the Answer ID prompt and click the Run button.

Run 9999999

<no audio> Add the 7 nines to the Answer ID prompt and click the Run button.

Refresh document 1

And open the Participant Appts tab.

Without answer IDs

We can see our desired agency, clinic, and appointment date, and that the Local Use Answer is blank.

When optional, all participants display regardless of whether they have the specified answer, and since no one has an answer ID with 7 nines, nothing displays in the Local Use Answer field.

Re-open the prompts modal. Click anywhere for a hint.

<audio – hint> Click the refresh icon in the Query section of the tool bar.

Answer IDs 2

Select the Answer IDs prompt again.

Clear list

Let's get rid of that odd list again...it's distracting.

Click anywhere for a hint.

<no audio> Hide the Createuserid list. Click anywhere for a hint.

<audio – hint> Click the checkbox with a 1 next to it beside the refresh icon.

Semi-colons and zeroes

Since we don't have values to select from, we have to type them into the text field, using semi-colons to separate them.

We don't have to use spaces, but whether we do or not, either way of typing them works.

In general, we must always enter preceding zeroes (except for dates) because Infoview needs to match exactly what is entered with the values in the database.

Go ahead and add the Answer IDs to the prompt.

Delete 99999999

And delete the 7 nines.

Idle prompts

We need to note that if for some reason we were to be idle for 5 minutes while working in the Prompts modal, after closing the Error message we can close the report from here or we can click the Run button and then close the report. The Cancel button won't work.

We're ready to run the report.

Click the Run button.

Refresh document

<no audio> Status bar displays.

Exit

The answer that corresponds with the IDs we entered into the prompt displays.

This completes our overview of prompts and running reports.

In the next module, we'll look at saving, exporting, and using input controls.

Click the button to continue.

End slide

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

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