Infoview Training 4: Saving, Exporting and Input Controls

OCTOBER 2025

Introduction

Intro

This Infoview Training 4 module provides an overview of saving and exporting reports and using input controls to further filter the output.

It is provided by the Minnesota Department of Health WIC Program.

Today's date

Today's date is October 13, 2025.

<Transition slide>

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

Saving reports

Review & save

In the last module, we ran a template using our desired prompts.

The next step is to save it.

We use the Save icon to save the template as our own version of the report and to our personal folders.

Hover over the Save icon then click it.

Save as

We cannot save a template. We can only save as.

Select Save As.

Save document

Because we opened this template from a folder under INFOVIEW TEMPLATES, the modal default opens to that folder.

Let’s see what happens if we try to save to a template folder.

Click the Save button.

Warning message

Read the Warning message then click the OK button.

Error message

The error message looks like a bunch of gobbledy-gook but there is one applicable statement, which is we don’t have the rights to edit this folder.

Close the error message.

<no audio> Click the Close button.

Save to personal

We can only save to our Personal Folders.

If we click on Personal folders…go ahead…

Personal folder

…we are saving to that folder and the reports in that folder show on the right (like we’ve seen before).

Since this is an appointment template, we are going to save it to our Appointments folder.

Go ahead and expand our Personal Folders…

<no audio> Click the arrow next to Personal Folders.

Select folder

…and select the Appointments folder.

File name

Since it’s going to be our own version of this report, we can change the name if we want to.

We’re going to save it as-is.

Click the Save button.

Saving

<no audio> Blue icons display.

Once saved to our personal folders, we can make edits to the output, and we can review Module 5 – Advanced Concepts if interested in how to make changes like that.

Click the button to continue.

Exporting reports

<Transition slide>

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

Export icon

We can download our report using the Export icon.

Hover then click.

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

Export to

The available formats are in the left panel.

Excel is the default, PDF, HTML, Text, and CSV.

The majority of us will usually use either Excel or PDF and the only change we need to make to export the report as-is is to select which tabs we want to export.

We can explore more of this on our own.

The tab we were viewing is default-selected, and we can select All tabs by click the All reports checkbox.

Let’s do that.

<no audio> Click the All reports checkbox.

All reports

We don’t need the Reference tab, so let’s de-select that.

<no audio> Click the Reference-Answer IDs checkbox.

Export

Click the Export button to download our report to Excel.

Download

We should be familiar with downloading documents in a browser…so moving on.

Excel

<no audio> Slide transitions from Infoview to Excel.

Click the button to continue.

More icon

Another method for exporting is to print a report by clicking the More icon and selecting print.

Go ahead and do that.

<no audio> Click the More icon and select Print.

Select print

<no audio> Click the More icon and select Print.

Print modal

We have options for how it will print.

Let's print just the current report.

Click the radio button.

<no audio> Click the Current report radio button.

Print modal 1

Click below the scroll bar.

No printer

Like most browser print jobs, there isn't a printer selection because…

Click the Print button.

Download PDF

…it downloads to a PDF.

PDF

Click the button to continue.

Input Controls

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

Input controls 1

Input controls are optional filters that allow us to create a subset of the original output after running it with our desired prompt values.

Use of input controls is indicated in the guidance document.

Like prompts, once the report is **saved** with input control selections other than All, our selection is maintained the next time we run the report.

Click the button to continue.

Open new report

If a report has input controls, a blue dot displays next to the filter icon under Analyze.

No blue dot; no input control.

We're going to open a template with input controls called NO SHOW BY DAY AND TIME, another Appointment report.

Before we do, best practice is to visit the Infoview Report Revisions and Corrections page to see if a template has been updated.

Click the button to continue.

Corrected and revised

We want to compare the Created On date of the report in our personal folders, which is the date we added the report to our folder…

<no audio> Slide transitions to topic slide.

Corrected and revised 1

…to the templates revision date.

We can also compare it to the Create Date in the INFOVIEW TEMPLATES folder, which is the most recent version.

If our Created On date is before the revision date, we should replace our current version with the revised template.

Although the description doesn't say that any **corrections** were made, updated templates are always reviewed to ensure they are working correctly, the queries are often revised to run more efficiently, and the formatting is updated to have a consistent look and to meet color contrast accessibility requirements.

So, we’re going to replace our current version of the report.

Click the button to continue.

Open template

Open the NO SHOW BY DAY AND TIME template in the INFOVIEW TEMPLATES, Appointments folder. Click anywhere for a hint.

<audio – hint> Click the folder icon in the File section.

Open template 1

<no audio> Open the NO SHOW BY DAY AND TIME template in the INFOVIEW TEMPLATES >> Appointments folder. Click anywhere for a hint.

<audio – hint> Click the arrow to the left of Public Folders to display its folders.

Open template 2

<no audio> Open the NO SHOW BY DAY AND TIME template in the INFOVIEW TEMPLATES >> Appointments folder. Click anywhere for a hint.

<audio – hint> Click the arrow to the left of INFOVIEW TEMPLATES to display its folders.

Open template 3

<no audio> Open the NO SHOW BY DAY AND TIME template in the INFOVIEW TEMPLATES >> Appointments folder. Click anywhere for a hint.

<audio – hint> Click Appointments to display its reports in the right panel.

Open template 4

Click below the scroll bar.

<no audio> Open the NO SHOW BY DAY AND TIME template in the INFOVIEW TEMPLATES >> Appointments folder. Click anywhere for a hint.

Open template 5

Double-click to select the template.

<no audio> Open the NO SHOW BY DAY AND TIME template in the INFOVIEW TEMPLATES >> Appointments folder. Click anywhere for a hint.

Open prompts

Go ahead and open the prompts modal. Click anywhere for a hint.

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

Prompts modal

We can use the Reset All button to remove all of the current prompt values.

Hover then click on it.

<no audio> Hover over the Reset All button then click it.

Agency prompt

We are going to run the report for agency 161 and for the date range of September first through the thirtieth.

Click below the scroll bar and select 161.

Agency prompt 1

<no audio> Click below the scroll bar and select 161.

Date prompt

Enter the Start Date using the calendar icon. Click anywhere for a hint.

<audio – hint> Click to select the Enter Start Date prompt.

Date prompt 1

<no audio> Enter the Start Date using the calendar icon. Click anywhere for a hint.

<audio – hint> Click the calendar icon to the far right of the text field.

Date prompt 2

<no audio> Enter the Start Date using the calendar icon. Click anywhere for a hint.

<audio – hint> Click on September to select it.

Date prompt 3

<no audio> Enter the Start Date using the calendar icon. Click anywhere for a hint.

<audio – hint> Select the first.

Date prompt 4

<no audio> Enter the Start Date using the calendar icon. Click anywhere for a hint.

<audio – hint> Click the OK button.

Date prompt 5

This time, enter the End Date by typing it into the text field. Click anywhere for a hint.

<audio – hint> Click to select the Enter End Date prompt.

Date prompt 6

<no audio> Enter the End Date by typing it into the text field. Click anywhere for a hint.

<audio – hint> Click into the text (Search) field in the right panel.

Date prompt 7

<no audio> Enter the End Date by typing it into the text field. Click anywhere for a hint.

<no audio> Type: 9/30/25

Date prompt 8

<no audio> Enter the End Date by typing it into the text field. Click anywhere for a hint.

<note> No audio hint.

Run report

And run the report.

<no audio> Click the Run button.

Refresh report

<no audio> Refresh document status bar displays and report transitions to agency 161 and September dates.

Filter bar icon

Now that we have our complete data, we can filter it further using the input controls.

Hover over then click the funnel icon with the blue dot.

Prompts summary icon

The filter bar, once selected, is maintained across sessions, or “pinned”.

We can view read-only report prompts and their current values by hovering over the brackets.

The 3 tells us the number of prompts.

Go ahead and hover then click the button.

<no audio> Hover over the brackets button the click it.

Prompts summary

Again. Read-only. Long-story-short. No need to click, just hover.

Click Close.

<no audio> Click the Close button.

Input icons

The input controls are in this section of the filter bar.

This icon has no function other than to indicate the input controls are all document-level, meaning they filter all tabs of the report.

There are also report-level input controls that only filter the report tabs they display on.

Go ahead and hover over the icon and three buttons then click on Clinic ID.

<no audio> Hover over the input control icon and buttons then click on Clinic ID.

Filter clinics

If we hadn't run our query first, instead of displaying the Clinic IDs, this message would show telling us that we have to refresh the report for the input control values to display.

The default is to have all values selected (unless we save the report **after** making changes to the input controls).

None of the buttons at the bottom are enabled until we make a change.

For instance, if only want to see no show values for Clinic 61, we de-select All and re-select 061.

Go ahead and do that.

Filter clinics 1

<no audio> De-select All and re-select 061.

Filter clinics 2

Bottom buttons are now enabled>Hover then click OK.

<no audio> Hover over the buttons on the bottom of the input control then click the OK button.

Filtered output

<waiting> Blue icons display.

The input control shows our selected value of 61 and our data have updated to reflect the filter.

If we open the Day tab…go ahead…

<no audio> Click on the Day tab under the filter bar.

Other tabs

Since it's a **document** input control, we can see that other tabs are impacted as well.

Multiple controls

If we select multiple clinics, the input control shows how many more options are selected.

If our report header doesn't have the info, which it usually doesn't, we will need to hover to see what's selected.

More

Since input controls are optional, we can filter by none, one, some, or all input controls.

They simply provide further flexibility in obtaining our desired data.

Let's save this template to our own Appointment folder.

Go ahead. Click anywhere for a hint.

<no audio> Save this template to our Appointment folder. Click anywhere for a hint.

<audio – hint> Click the Save icon (third icon from left under File).

Save as 1

<no audio> Save this template to our Appointment folder. Click anywhere for a hint.

<audio – hint> Click the arrow to expand the Personal Folders.

Save as 2

<no audio> Save this template to our Appointment folder. Click anywhere for a hint.

<audio – hint> Click on Appointments to select the folder.

Save as 3

<no audio> Save this template to our Appointment folder. Click anywhere for a hint.

<audio – hint> Click the Save button.

Overwrite

Since we already have a version of this report saved to our Appointments folder, this message lets us know that we can replace it by overwriting it.

However, when we overwrite, the Created On date in our folder doesn’t update.

Click the button to continue.

Overwrite 1

We use the Created Date to compare our version to the template, so we need it to always reflect the date we saved it to our folder.

Therefore, best practice is to first **delete** the old report **then save** the new version.

We are going to follow best practice.

Click the Cancel button.

Delete report

We can delete a report from our folder right here.

Select the report in the right panel, enabling the delete icon, click it, confirm it, then save.

<no audio> Select NO SHOWS BY DAY AND TIME, click the Delete icon, confirm delete, and click the Save button.

Delete and save

And as expected, our Create Date is today’s date. Click the button to continue.

<no audio> Select NO SHOWS BY DAY AND TIME, click the Delete icon, confirm delete, and click the Save button.

<no audio> Slide transitions to folders view to show updated date for report.

Reset input controls

The first icon in the filter bar removes all of our changes to the input controls.

Hover then click.

<no audio> Hover over then click the Reset input controls icon.

Close report

Now let’s use the BI Launch pad to close the report.

Close 1

<no audio> Use the BI Launch pad to close the report.

Close 2

Before closing the report, since we reset the input controls back to their defaults, Infoview asks whether we want to save the changes.

If this were still the template, the message would display a Save As button instead.

We want to keep our filtered version of the report for the next time we run it.

We don't want to keep this change, so click the Don't Save button.

Close filter bar

How do we "unpin" the filter bar if we don't like it when it's empty?

Go ahead. Click anywhere for a hint.

<no audio> "Unpin" the filter bar. Click anywhere for a hint.

<audio – hint> Click the filter icon (first icon under Analyze).

Close filter bar 1

Click the Continue button.

Logging out

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

Log out

We can logout anywhere in Infoview by clicking the blue icon with our initials and selecting logout.

Go ahead and do that.

<no audio> Click the blue icon with our initials and select Log out.

Log out 1

<no audio> Click the blue icon with our initials and select Log out.

Log out 2

Wait until…

<no audio – slide description> "Cleanup is in progress…please wait."

Log out 3

…we are returned to the login page before closing the browser window.

We need to note that closing the entire browser will also log us out.

However, if we close the window, it doesn't.

Since that is a security risk, we should just use best practice and always logout.

This concludes the required training for Infoview 4.3.

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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