Infoview Training 5A - Advanced Concepts: Managing Personal Folders

NOVEMBER 2025

Introduction

Intro

This Infoview Training 5A module provides an overview of managing personal folders in Infoview.

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

Today's date

Today's date is November 5, 2025.

Purpose

This module will provide a more in-depth look at organizing the personal folders in order to work more efficiently and use Infoview more effectively.

Personal folders

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

Open folder

Let's start by clicking the Folders' tile.

Web intelligence

<no audio> Blue waiting icons display.

Let's just mention the Webintelligence folder.

This holds temporary files, and we should always just leave it alone and as-is.

Expand nodes

Besides opening and saving as, we can also add templates to our Personal Folders by copying and pasting them.

Expand the nodes for Public Folders, INFOVIEW TEMPLATES, and Agency Management then select the Due/Overdue folder.

Expand nodes 1

<no audio> Expand the nodes for Public Folders, INFOVIEW TEMPLATES, and Agency Management then select the Due/Overdue folder.

Expand nodes 2

<no audio> Expand the nodes for Public Folders, INFOVIEW TEMPLATES, and Agency Management then select the Due/Overdue folder.

Expand nodes 3

<no audio> Expand the nodes for Public Folders, INFOVIEW TEMPLATES, and Agency Management then select the Due/Overdue folder.

More icon

We can right-click over the title of the template to open a menu or just click the More icon in its row to open that same menu.

Let’s do that. Click the More icon in the DUE, OR ONE MONTH OVER… template’s row.

Organize

Copy is found under Organize.

Hover over Organize then select Copy.

Copy template

Copied.

This time, expand our Personal Folders.

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

Paste

And let’s paste this template into our Agency management folder.

Select Agency Management in the left panel.

<no audio> Click on the Agency management folder.

More in header

The More icon above the grid impacts folders in the left panel.

It becomes enabled when we perform an action, such as copy.

Click the More icon above the grid, hover over organize, and select Paste.

Paste 1

<no audio> Click the More icon above the grid, hover over organize, and select Paste.

Back up

Let’s go back up one level and click on Personal Folders.

Click and drag

We can move reports by clicking and dragging them into folders.

Infoview confirms and we do want to proceed.

Click Yes.

<no audio> Click the Yes button.

Click and drag 1

<no audio – slide description> New list displays with Clinic Productivity moved into folder.

We can also click and drag a report…

Click and drag 2

…from the right panel to a folder in the left panel.

Add folders

We add folders by clicking the plus icon.

Let’s add a One Call folder to house our two reports.

Click the plus icon.

New folder

We’ll only use New Folder. Select it.

<no audio> Select New Folder.

Create folder

We can name it and add a description and key words.

We're just going to name it.

Click into the Name field, type One Call, and click Save.

<no audio> Click into the Name field, type One Call, and click the Save button.

Name folder

<no audio> Click into the Name field, type One Call, and click the Save button.

Save name

<no audio> Click into the Name field, type One Call, and click the Save button.

Multi-select

Next, we'll move our reports.

We can move more than one report at a time using the multi-select checkboxes.

Click the multi-select checkbox next to ONE CALL: FUTURE then ONE CALL: ROSTER.

Multi-select 1

<no audio> Click the multi-select checkbox next to ONE CALL: FUTURE then ONE CALL: ROSTER.

Multi-select 2

We can click-and-drag or use the More icon and copy/paste to move the two ONE CALL reports into the One Call folder.

We know how to do this…so moving on.

<no audio> Slide transitions from Folders page with ONE CALL reports listed to page without and "Successfully Pasted" message.

Change name

We change the name and descriptions of our folders and reports the same way: working in the right panel, highlighting a row, and using that's row's More icon.

Let's change the Staff management folder to Staff productivity.

Click the More icon in the Staff management folder row.

Delete

Notice that Delete is enabled, and we can delete any folders or reports in Personal Folders.

One caveat, Infoview will let us delete folders that contain reports, and the message is the same regardless of whether the folder is empty or not.

Continuing on…select Properties.

Properties

We saw this modal in a previous module. This time we'll make a change.

Double-click on management, type productivity, then click save.

<no audio> Double-click on management, type productivity, and click the Save button.

Change title

<no audio> Double-click on management, type productivity, and click the Save button.

Change title 1

<no audio> Double-click on management, type productivity, and click the Save button.

New title

<no audio – slide description> Title has updated to "Staff productivity".

Summary

This completes our overview of managing Personal Folders.

Continue with the next module for an introduction to Design mode and an overview of queries, data, and columns in the report output.

<Transition slide>

<no audio> Slide transitions to blank topic slide.

End slide

Thank you for taking the time to review this Infoview advanced concepts training module provided by the Minnesota Department of Health WIC Program.

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