Infoview Training 5B - Advanced Concepts: Intro to Design Mode

NOVEMBER 2025

Introduction

Intro

This Infoview Training 5B advanced concepts module introduces Design Mode.

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

Today’s date

Today’s date is November 5, 2025.

Purpose

This module provides an overview of more advanced report concepts as a foundation for making changes to report outputs.

Design mode overview

Open folder

For this, and all following modules, we’ll make modifications to just one report.

Open the Agency management folder and the DUE, OR ONE MONTH OVERDUE… report.

<no audio> Click the Agency management folder in either panel and then open the DUE, OR ONE MONTH OVERDUE… report.

Open report

<no audio> Click the Agency management folder in either panel and then open the DUE, OR ONE MONTH OVERDUE… report.

Reading mode

Reports open in Reading mode.

Although some of the advanced concepts are also available in Reading mode… go ahead and click on the Reading button…

Page navigation

…we are going to focus on working in Design mode.

Notice that our pinned vanishing toolbar no longer displays when in Design mode.

Those options are now under Display on the main toolbar.

The page navigation is under the second More icon to the right. Go ahead and click on it.

Print layout

Currently, we are in print layout view, which has a page-like look similar to exporting to a PDF.

For reports that have a lot of columns, like this one, if we click the icon to de-select the Print Layout…hover then click…

<no audio> Hover then click the Print Layout icon to deselect it.

Other layout

…we can use a layout that looks more like when we export to Excel where the margins are removed and scroll bars allow more horizontal and vertical scrolling.

Another handy Display icon is this one that allows us to freeze table headers when in either view.

We're going to return to page view.

Hover over the freeze headers icon then click the Print Layout icon again.

Advanced refresh

Arrow icon

We know from the required trainings that clicking the Query refresh icon opens the Prompt modal and runs all the report queries.

Most of us won't use anything else under Query or Insert since the functions are mostly used by report designers, but we're welcome to check them out on our own time.

Except for possibly the arrow next to refresh, which provides an advanced option.

Hover, then click the arrow under Query.

Advanced refresh

Hover over then select Advanced Refresh.

Refresh data

We can see this report has 4 queries: Reference, Cert, MCA, and NV, and they were all refreshed when the report designer last saved this template.

The interesting part of this is how long each query takes to run and the number of rows of data.

For instance, if we only wanted to refresh the Reference info, a very quick query, we don't have to wait for all the other queries to run.

Go ahead and de-select the Data Provider checkbox, re-select Reference, then click the Refresh button.

<no audio> De-select the Data Provider checkbox, re-select Reference, and click the Refresh button.

Refresh data 1

<no audio> De-select the Data Provider checkbox, re-select Reference, and click the Refresh button.

Refresh data 2

<no audio> De-select the Data Provider checkbox, re-select Reference, and click the Refresh button.

Prompt

We are running a query so the prompt modal opens.

Since the Reference query only uses the Agency ID prompt when run, it's the only prompt listed.

Let's run this for agency 241.

Click below the scroll bar twice, select 241, then click Run.

<no audio> Click below the scroll bar two times, select 241, and click the Run button.

Prompt 1

<no audio> Click below the scroll bar two times, select 241, and click the Run button.

Prompt 2

<no audio> Click below the scroll bar two times, select 241, and click the Run button.

Prompt 3

<no audio> Click below the scroll bar two times, select 241, and click the Run button.

One tab

Notice, it took only a second to run and other than the error (which we'll come back to in a minute), this tab is not impacted at all.

But if we open the Reference-Answer IDs tab…go ahead.

<no audio> Click on Reference-Answer IDs in the header.

Advanced refresh 1

…the data is pulled for agency 241 instead of 161.

The Advanced Refresh may come in handy for larger reports that take a while to run when we only need to update one tab, like Reference to get answer IDs, etc.

Let's go back to that error on the Nutrition Visits tab.

<no audio> Click on Nutrition Visits in the header.

Formulas

Correct error

We often use formulas to manipulate the output.

Hover then click on the Fx icon under Analyze.

Formula bar

The formula bar opens.

Now click on #ERROR.

Formula structure

Formulas, and all data, have an equal sign at the beginning and constants, such as text, are enclosed with quotation marks.

Error explanation

The date formula is dependent on the Enter Start Date prompt.

Since only the agency ID prompt was refreshed, this erred out.

Re-run report

<no audio> Slide transitions to prompts modal.

We're going to run this behind the scenes for agency 161, November 2025, all their clinics, and the current Answer IDs to refresh all the tabs and get rid of the error.

<Transition slide>

<no audio> Slide transitions to refreshed output.

Queries and dimensions

Which query

We can see which query the data is from by clicking on the data in each column.

Click on the first Household ID.

NV query

This table uses the NV query.

Click on the Certs & MCAs tab then click the first Household ID again.

Which query 1

<no audio> Click on the Certs & MCAs tab then click the first Household ID again.

Main panel

We can also combine data from two different queries.

The report columns are found in the main panel.

Hover then click on the clipboard icon.

Dimensions

This is a little deep-dive, but we'll just dip our toes and jump back out.

First let's expand the node next to CERTMCACertificationduedate.

Merged dimensions

Dimensions are the columns we can add to our output.

We can add columns but only if they are from the same queries as the rest of the table in this tab.

When dimensions from multiple queries are combined, such as Cert and MCA, they are called merged dimensions and are sometimes renamed.

Single dimensions

When there is more than one of the same dimension that hasn't been merged, like Agency ID, it will show the query name.

If there is only one dimension, it won't show the query, but we can hover to see both the type of data field and the query it comes from.

Hover over Certificationduedate then click the Continue button.

Summary

We should now have a basic understanding of the queries that build our data and the columns that display it.

Continue with the next module to learn how to make changes to 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.

*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.*

This institution is an equal opportunity provider.