

Infoview Training 2: Search, Folders, Templates, and Reports

OCTOBER 2025

Introduction

Intro

This Infoview Training 2 module provides an overview of search, folders, templates, and reports.

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

Search

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

Search icon

We can search for key words or a specific title from any page in Infoview.

Let's look for the Daily Appointments template.

Click the Search icon.

Search

Type daily appointments into the Search field.

<no audio> Type: daily appointments

Search dropdown

We can select from this dropdown, but we can't tell any difference between the 4 daily appointments options.

So, instead, let's click the search icon inside the field (or press the Enter key).

<no audio> Click the Search icon or press the Enter key.

<Waiting>

<no audio> Blue waiting icons display.

Default

The default search results include all instances in Infoview.

Whether it has the words in the title or description, if it's a report or document, whether it is our version, belongs to someone else or is found in the template's folder, and regardless of when the report was last run.

But we can filter these results further.

Click the Fields dropdown.

Fields filter

All our titles have the same words, so in this instance, that's not going to do much.

Click the Type dropdown.

Type filter

It shows there are 43 reports or templates and 3 PDFs. Let's get rid of the PDFs.

Select web intelligence.

<Waiting>

<no audio> Blue waiting icons display.

Location filter

We now have 43 reports or templates.

Click the Location dropdown.

Location filter 1

This looks promising, right? We have 42 that belong to users and 1 template.

Let's select the template.

<no audio> Select Infoview templates.

<Waiting>

<no audio> Blue waiting icons display.

Refresh filter

As we'll see in a minute, all our templates are found in the INFOVIEW TEMPLATES folder.

To be thorough, click the Refresh Time dropdown.

Refresh filter 1

These are options for the last time a document was opened, or a report was run.

Last couple of things...click the Show Details link.

Show Details

This simply displays the entirety of the description.

We can also open the report or document by clicking the title.

Go ahead and open the report.

<no audio> Click the DAILY APPOINTMENTS title.

Return home

<no audio> Blue waiting icons display.

And return to the home page.

<no audio> Click the home icon in the top left.

Return home 1

Click the button to continue.

Folders

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

Folders overview

The Folders tile provides access to all of our reports and templates.

Go ahead and click on it.

<no audio> Click the Folders tile.

<Waiting>

<no audio> Blue waiting icons display.

Two folders

There are two different folders: Personal and Public and it opens to the contents of our Personal Folders.

We can expand the nodes to show other folders in the left panel by clicking the arrows.

We should note that we use single clicks to navigate Infoview.

Go ahead and expand Personal Folders then Public Folders.

<no audio> Click the arrow to expand Personal Folders then Public Folders.

<Waiting>

<no audio> Blue waiting icons display.

Expand

<no audio> Click the arrow to expand Personal Folders then Public Folders.

Folder contents

Our personal folders house and organize the public report templates we have previously saved so that we can use them.

Public folders contain agency end-of-month or EOM and annual reports, as well as INFOVIEW TEMPLATES.

Depending on our rights, we may see and have access to other public folders.

<Transition slide>

<no audio> Slide transitions from Personal Folders page to topic slide.

Agency EOM

Agency EOM reports are generated during end-of-month and include summary statistics.

More information is available on the WIC EOM Reports webpage.

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

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

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

Annual reports

The Annual Reports folder houses reports created by the WIC State Office with small numbers by agency and grantee for previous years.

It is also used to provide data for our agency's Nutrition Education Plan.

Most of the more current data are now available in the Local Agency Portal.

Click the button to continue.

Infoview templates

INFOVIEW TEMPLATES houses all of the ad-hoc report templates that we can choose from and use.

Since our information system's database is very complex, only report developers at the state office can create templates.

Report templates are the most current version of a report.

We can run templates, but we cannot save them because we don't have rights to save to the INFOVIEW TEMPLATES folder.

However, we can **save as** to our personal folders so that the template becomes our own version of the report.

Once we "own" the report, we can save it and even make some edits (if we ever want to).

Click the button to continue.

Infoview templates

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

Right panel

We should spend some time tooling around the Annual and EOM folders on our own time.

For this training, our focus is INFOVIEW TEMPLATES.

We single-click the folder to display its contents in the right panel.

Click on INFOVIEW TEMPLATES.

<Waiting>

<no audio> Blue waiting icons display.

Right vs left panel

The report templates are organized into folders in alphabetical order by topic.

In general, we aren't going to use the multi-select, mark favorite, or More columns for public folders.

However, we can navigate folders from the left or right panel, depending on our preference.

Click the arrow next to INFOVIEW TEMPLATES in the left panel.

<Waiting>

<no audio> Blue waiting icons display.

Open folder

To see what appointment templates we can use, we can single-click the Appointments folder in either panel.

Go ahead and do that.

<no audio> Click the Appointments folder in either panel.

Default list view

The default List view is not ideal, considering our title column is small, truncating our titles, and our Created On column is unnecessarily huge.

We have two options.

We can hover over titles to view their entirety.

Go ahead and hover over the titles in the first two rows then click the Continue button.

Expand title

We can also hover over the edge until our mouse changes then click and drag.

Expand title 1

The expanded column is maintained while we work within these folders but will revert if we return to the home page or our session ends.

File types

There are two different types of files: templates and guidance documents.

There should be a guidance document for each template.

Besides the icons, we can tell which are templates because their titles are always capitalized.

Let's take a look at a guidance doc.

Click on the Appointment with Clinic Locations Guidance Document.

Open document

Click the browser tab to the right of the SAP BI Launch Pad tab.

<Transition slide>

<no audio> Slide transitions upward to cover browser tabs.

Guidance docs

Guidance documents are working docs the state template developers use to keep track of how the report was made and any revisions.

For us, the template users?

They tell us what folder it can be found in, when it was created or last updated, what info the report provides, some ideas for how we can use it, some statements about how it works...click below the scrollbar.

Guidance docs 1

...what the template tabs look like, and information we can enter when running the report.

If we are wondering how a report works, our first step should be taking a look at the Guidance Doc.

Another reason these documents are important is they tell us what and where information is being pulled from.

Click the button to continue.

Report design

Report designers use Infoview to create SQL queries that pull the desired data from different tables in our information system's database.

Comparing templates

We don't need to understand queries or databases to use Infoview, but we do need to recognize that particular data coming from different tables may not be the same and how that can impact templates and report outputs.

For instance, the agency where a participant is scheduled for an appointment may differ from where the participant belongs right now and both may be different from where they were last certified.

Click the button to continue.

Comparing templates 1

In general, most report outputs shouldn't be compared unless we know they have the same criteria, and we should ask ourselves whether we understand where the information is coming from and how the data are being pulled.

The guidance docs help with this.

For example, two reports that provide lists of participants who were certified during specified dates and at the specified agency.

Both pull the dates and agency from the same table, and at first glance seem like they are the same and could be compared.

But one is unduplicated and only displays a participant once even if certified multiple times and the other displays all certs that occurred during those dates.

So they are not the same and can't be compared.

Click the button to continue.

Created on

The Created On date, which we will use, is when either the new or revised version of the template or report was added to its folder.

<Transition slide>

<no audio> Slide transitions to topic slide.

Updated templates

Templates are updated to correct agency-identified issues with the output or to better meet needs of agencies using a template.

Only the most recent version is in the INFOVIEW TEMPLATES folder.

Since we save our own version of the template to our folders, our version does not automatically update, and we should always ensure we are using the most recent version.

Updated templates 1

Since we transferred to WINNIE in 2024, templates need to be corrected if their output has local use, state use, new certs, or staff and the State is correcting these templates based on Local Agency request.

We can submit the Local Agency Reports & Data Request if we want to use a template, and it hasn't been updated.

Updated templates, both when and how, can be found on the Infoview Report Revisions and Corrections page.

Click the button to view this webpage.

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

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

View template

We can single-click the title to view and run a template before saving a version to our folder.

Let's open the DAILY APPOINTMENTS BY PARTICIPANT AND HOUSEHOLDS WITH OPTIONAL LOCAL USE ANSWER again.

<no audio> Single-click the DAILY APPOINTMENTS BY PARTICIPANT AND HOUSEHOLDS WITH OPTIONAL LOCAL USE ANSWER title.

<Transition slide>

Click the button to continue.

Run reports interface

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

Run interface

The interface is mostly the same whether it's our saved version of the report or the template.

We're going to start at the top and work our way down.

We've seen this dropdown at the top of every page, but its title changes based on the page we are on.

Go ahead and hover to view the dropdown's name then click on it.

BI Launch Pad

We use the BI Launch Pad to navigate between reports or templates we are currently using and reports we use often enough to pin.

The BI Launch Pad lists all of our currently open reports or templates, with the most recently opened at the top.

If we open the same report or template more than once, both instances will be listed here.

The list is maintained until our session ends and has a limit of 10 unpinned documents.

Hover over the icons to the right of the first template in the list then click the Continue button.

BI Launch Pad 1

If we pin a report or template, it remains in this list after a session ends.

Best practice is to make sure we always pin our version of the report and **not** the template.

As long as a report is listed here, it remains open. So, we can also close it.

Let's close the second instance of this open report.

<no audio> Click the Close Document icon in the second row.

File menu

Moving on to the menus.

The menu names are read-only.

Hover over the first icon under File then try clicking it.

New icon

Yep. Nothing happens. Unless we're a report designer, we don't have rights to create new documents in Infoview.

The yellow dot on the next icon may indicate changes have been made without saving, but it seems to behave a bit randomly.

Go ahead and hover then click.

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

Open icon

The open icon allows us to quickly navigate between all of our reports, including favorites, recent documents, personal folders, and public folders.

Click on Personal Folders.

Open

Now click the arrow next to Personal Folders.

Open 1

The main difference is we can only navigate folders on the left and only reports or templates on the right.

This is the last time the report was run or saved instead of the created date.

Instead of a More icon, we can view the descriptions by hovering.

Hover over the CLINIC PRODUCTIVITY BY WIC TYPE report then click the Continue button.

Recovery

We won't use Categories, but we can use Document Recovery to re-open reports we've closed during this session.

Go ahead and click on it.

<no audio> Click on Document Recovery.

Recovery 1

We click items in the left panel to display multiple instances of a closed report or simply select the radio button to re-open a report

We can explore this functionality on our own if interested.

Let's go back to Folders and open another report.

<no audio> Click on Folders.

Double-click

To open a report, we can either click it and then the Open button or, for a little change-up, double-click it.

Go ahead and double-click the CLINIC PRODUCTIVITY BY WIC TYPE template to open it.

<Waiting>

<no audio> Blue waiting icons display.

Idle error

If we open or run a report and then take 5 minutes to do something else, maybe stretch, get coffee, whatever, we will get this idle error.

If it displays, we will have to go to the BI Launch Pad and close the report, and re-open it if we want to continue using it.

Otherwise, this error just keeps popping up.

For now, let's just close the report.

Close the error and then close this report.

<no audio> Click Close, open the BI Launch Pad, and close the CLINIC PRODUCTIVITY report.

Idle error 1

<no audio> Click Close, open the BI Launch Pad, and close the CLINIC PRODUCTIVITY report.

Idle error 2

<no audio> Click Close, open the BI Launch Pad, and close the CLINIC PRODUCTIVITY report.

<Waiting>

<no audio> Blue waiting icons display.

File icons

Hover over the rest of the File icons then click the button to continue.

Exit

In the next module, we will look at prompts and running 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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