WKU InfoView

A
Web
Reporting
Tool at
WKU

Enterprise Systems
Revised 2015
Barbara Scheidt, 270-745-8812
MMTH 373
barbara.scheidt@wku.edu
WKU InfoView
http://infoview.wku.edu

Prompts: a variable that must be given a specific value during the execution of a program to return needed information. Most reports will ask for prompts but there are a few exceptions so for those all you need to do is Schedule the report. Prompts must be entered in the correct format and valid values. (If the Prompt ask for department you must use the department value using anything else will not return the information you are seeking.) Some reports will require additional security to process -- those areas are Human Resources and Finance.

Most Common Prompts:
Term – This is a six digit code used to identify the term you are seeking information about. It is always the four digit year plus the following codes to identify the term – 05 Winter, 10 Spring, 20 Summer and 30 Fall. So if you want information for Spring 2015 use the term code 201510.
College -- Every college has a two character code to use to report information for that college. Examples: Gordon Ford College of Business-BU, Arts and Letters-AR, University College-IS.
Department – A four character alphanumeric field that identifies the Department. Codes will be at least two positions examples: CS – Computer Science, MATH – Mathematics, ENG – English.
Major -- A four character alphanumeric field assigned to each major. This field is case sensitive so you must use a ‘P’ when looking for those seeking admissions to a major.
Minor -- A three character field that is assigned to classify each Minor. Currently numeric information only is used to identify the minor.
Concentration -- A four character alpha field that is used to define each concentration.

Reports use the following links to process and view reports:
View Latest Instance – Link that allows you to view the information from the last report processed.
History – Link allows you to view all of the instances of the report that have been processed in the past that has not been deleted.
Schedule – Link that allows you to submit a report to request the information that is needed. Will also show the start and end time of the report processing.
View – Link that allows you to enter all Prompts on one form and will require you to use your Banner UserID and Password to run the secured report.

Human Resources / Finance / BSR Prompts
Fiscal Year – It is a 2 character numerical field which is always the last two digits of the budget year.
Posting Period -- May be current (the month you are in) or the following example –July use - 01, August use – 02, Sept. use – 03, etc.
Index code – a six digit numeric field that will identify the Org or Grant area of your responsibility.
Position Number – P_POSN -- Used by Human Resources to identify the position the individual has at WKU
Requisition Number – P_REQ – When a job opening is posted this is the number assigned to identify the position.
Security Code or PIN-- A code that is assigned by Human Resources or Advance so individuals may process a report with their confidential information.
Period Begin Date – dd-mon-yyyy – Decide the beginning date, then you must use the correct format – for the dd use 01-31, for MON use the three character abbreviation for the month examples – March –MAR, June – JUN for the year use the four digit year example 2015
**Period End Date** – dd-mon-yyyy – Decide the ending date you want then use the correct format – for the dd use 01-31, for MON use the three character abbreviation for the month examples – March –MAR, June – JUN for the year use the four digit year example 2015

**Fund** – The primary identification code of any chart of accounts that identifies the account / area. It is a six digit numeric field that will list line item charges and receipts. (Usually use 110000 when running reports.)

**Orgn or Organization** – It is the six digit code that is assigned to your Department/Organization.

**WKU ID** – It is the 9 digit 800 # assigned by Banner when an Individual or Vendor is added to Banner.

**Payroll Year** -- Is based on calendar year (Jan-Dec) a four position field. Enter the year you need the information for.

**Payroll ID** – Two position field that is used to identify the type of payroll information that a person is wanting.

**Payroll Number** – This will be a two digit number from 1 to 26 assigned by Payroll when they are processed.

**Timesheet Organization Code** – The six digit numeric code that identifies the Department or Area your Org code.

**Approver User ID** – U_xxxxxxxxx – Always use your Banner Account ID when asked for this information and then you’re Banner Password

**HR / BSR use the report title to process information:** (Double Left Click the report tile and the Prompt boxes will appear enter Prompts and then select the OK button. Some reports may require additional information before they are processed.

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**Example of Prompt form:**

**Enter Values select OK**

**Enter Banner User ID & Password**

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**WKU InfoView**

WKU InfoView is an online web application that is used to obtain information from Banner / Advance, the Data warehouse and other Applications as developed.

Enter the following URL in the web browser: [http://infoview.wku.edu](http://infoview.wku.edu) Press enter. The Log On to InfoView box will appear. Enter your NetID in the User Name box --
(example – bbb00000) and NetID password in the Password box. Make sure that the Authentication box has Windows AD listed. Select the Log On button.

When logged in, the InfoView home page should display – with the Documents tab appearing as the home page or others as listed based on your settings. Everyone should see Public Folders – this folder will show all folders you have access too. All Faculty/Staff employees will have access to the WKU Campus Community folder once they have been activated in HR. You must be granted access to any secure folders by contacting the Enterprise Systems department and completing the correct paperwork.

The Documents tab should be the defaulted tab that appears when you access InfoView. With the Folders group selected

If it is not you may want to go to the Preferences link and set the checkbox under General – Use Default Settings (Administrator defined) to set that setting.
The My Documents group will contain you’re: My Favorites folder (that you may use), and Inbox, My Alerts, Subscribed Alerts, and Personal Categories (which we do not use). (This group may be set as your defaulted open group by changing this Default settings. We cannot combine this area with the Folders group) Note when the My Documents group is opened the Folders group is closed and you will see it listed at the bottom of the page. Also, you will have a Search function page at the bottom (and at the top right) which will display the results for which you do a search. You many refine the search results for the following: Refresh Time, Type, location, data source, author and will display the Report title and description under Search Results. By performing a single right click you will open the Menu box, a double left click opens the Prompts menu – but remember this function does not allow you to change any Prompts that have defaulted values in the field

Home tab: This tab has two blocks of information that you may use often: My Recently Viewed Document and My Recently Run Documents. The other three blocks of information will not be used that often.

The Documents tab will have a My Documents group that will have some of these folders listed: You will only use this sub group if you use the My Favorites function – Do not use My Alerts, Subscribed Alerts or Personal Categories – some staff members may use the Inbox function as set by the programmers.
Search page: Open the tab titled Search and you will see a search box also you have one on the title bar to the right of the Log Off link. You may perform searches for reports information:

To search for reports about Joint Enrollment enter your search information and a list all reports with Joint and/or Enrollment in the title will be listed. This will help you find report information that you need.

**Navigation Toolbar**

View menu: will display View link (which opens the Prompts form) and Properties link (gives the title of Report and Description of what the report should have), date the report was created and last modification.
New menu – will allow you to add folders if you use the My Favorites function. You will not use any of the other links under this menu:

Organize menu – When the report title is highlighted – this function will allow you to create a Shortcut in MY Favorites, Copy Shortcut, Paste Shortcut and Delete (Never delete anything delivered by IT only what you have created or generated)

Send menu – may be used by the campus community but will only be the Email function.

More Actions menu – you will use the Schedule function, History (View Instances) function. You will not use Mobile Properties, or Categories and some areas will be able to use the Document Link.

Details menu – when selected will Display a Summary of the reports information: when selected will open a Panel on the right of form displaying the information.
**Scheduling Reports**

Start by finding the folder that contains the report that you want to schedule. For this example we will use the Admissions folder. In the right panel you will see a list of any sub-folders and/or reports in that folder.

Now select the report by doing a single right click on the report title and the Menu box will open.

Values in the Menu box:

- **View** -- Opens the Prompt form
- **Properties** -- Information about when the report was created or last modified
- **Schedule** -- Opens form to enter Prompts and Schedule the report for processing
- **Mobile Properties** -- Currently not used
- **History** -- List of all instances that are currently available to view
- **Categories** -- Currently not used
- **Document Link** -- Currently not used
- **New** -- Only function you may use is creating Folder under your My Favorites
- **Organize** -- Create your Shortcuts in Favorites, Copy Shortcut or Delete
- **Send** -- Some may use the email function listed in that group
- **Details** -- Information about the report you have selected

Select Schedule from the Menu -- (you may select the View link for secured reports)
Scheduling form appears:

Select the Prompts function and the Prompts form will open—Notice it may have two areas – Prompts Edit button or the Parameter block that you will set the Scheduling Value in the field(s). (Note sometimes you will see a third function that may have a values table and a filter function)

Option 1: Selecting the Edit Values button will open the Prompts form which will display the Enter Prompts boxes

Enter your values in all of the boxes and then select the OK button
You will be returned to Schedule form which you will then select the Schedule button. (Note: you will see your values in the Parameter boxes.)

Then the History form opens with the report instance showing. It will process form Pending, to Running, to either Success or Failed. Note you do not have to refresh the report it will refresh automatically.

To see the report information either select the Instance Time or Title and the report will open. When finished close the report by selecting the close function on the tab.
Option 2: Using the Parameters function to enter Prompts in the boxes. Select the Prompts function from the list.

Form will open use the Parameter area now: Select the all fields marked Empty under the Scheduling Value Heading – Make sure that all fields have a value in them other than Empty.

Possible type of Parameter boxes:

Enter only one Value: Select OK button.

Selection from a drop down list: Select your value from the list and then select the OK button.

Enter multiple values: Enter criteria in left box then select the Add discrete value button and the value will be added to the Selected Values box and repeat until you have all values entered. Then select the OK button.
Once all values are entered you should have not Empty Scheduling Values select the Schedule button.

To Re-run or Reschedule a report using the same Prompts just highlight the the report information : by select the icon on the left or select the Created by field. Once the row is selected go to the fourth icon on the toolbar and select it to rerun the report.

Or the simpler method it to highlight the information, select the More Actions button once opened select the Run Now function and the report re-runs

The report will be resubmitted to run. Watch the processing in the lower right corner of the form just in front of the word Total for the processing status bar. Watch this for all reports.
Once you are ready to view a report you may select the Instance Time or Title to see the data. Note some report will open in a tabbed form and other may open in another type of form: example Excel Spreadsheet

Report displayed

Tab information – when report opens in at tab the first icon will allow to open the report in another window, the pin icon will allow you to pin the report to the tabs bar (you may open other reports and toggle between them) the X will close the report and you will be returned to the History Window.

ToolBar functions on Reports tab – most users will not use the File button, arrow buttons are for going back and forward in History (also not used by most users) Printer icon will be used by all, Refresh icon will rerun the report, Export icon will allow to export the report to into other formats, next you will have the previous page icon then the next page icon then the page information icon that allow you to enter the page you want the the drop down arrow allows you to go to the first page or last page of the report, and the last button is the zoom function . Notice on the left panel the binoculars – this will allow you to search for information in the document

View link selection
If you select View link the Enter Values Prompts form will load. Enter the Prompts and select the OK button. Report will process.

Report may open in the same window or in another window. (This one opens in same window). Close the report by using the close function on the tab.

Printing Reports: Select the Printer Icon located on the Toolbar above the Report information.

Print setup form appears – Print your document as you print any document.
Exporting information: 1. Select the Export icon and the Export menu box appears then 2. Select the drop down arrow to see all the formats that you may use for exporting. Make your selection. 3. Export box reappears with your selection so now select the Export button

1. 2. 3.

Your report will be exported to the format that you have chosen.

Changing the Format of a report: Most reports are created in a Crystal Reports format unless the requestor requested the report to be created in another format. It is simple to change the format of a report by instance. From the Schedule menu select the Formats function, then select the drop down arrow in the Format Options for Selected Documents box, then select the format you wish to use from the list and then if everything has been set in the Schedule list select the Schedule button

Delete an Instance from the History form: select the Instance to be deleted by highlighting the row. You will only be able to delete Instances that you have created and only delete Folders that you have created never one that has been delivered by IT.

Select the Organize button and then select Delete from the Menu
Verification Box will appear asking you to confirm that you want to delete this item. Select OK button and it will be removed. The Cancel button will void the operation.

**Run-Now or ReSchedule a Report:**
Run Now – re-run a report by selecting the report, then select the More Actions button, then select Run Now link from the list of options. This will send the report to re-run with the prompts that you had listed in the Parameters box.

Submits job to run watch you status bar at the bottom right of form or keep watchin the Status column for you new success.

Re-Schedule a report by selecting the More Actions button, then select the Reschedule link

It will open the Parameters form now titled Reschedule – this process allows you to change any of the Prompts, Formats or any other processes listed that are enabled for the user. Once you are finished with the changes select the Schedule button.
History – Will list of all Instances currently in history for that report. 1. Highlight the Report title with a right click and select History from Menu, or do a single left click and then select the More Actions button. Both will open the History page and you will be able to see a list of reports that have been run and be able to select any of them to review.

My Documents Group:

My Favorites: Creating shortcuts to reports that you use. To create a shortcut in the My Favorites folder find the report in your list of available reports and highlight the report. Select the Organize button on the toolbar and then select the link Create Shortcut in My Favorites, shortcut is created in the My Favorites folder. Please check your folder for the Shortcut.

Creating sub-folders in My Favorites and adding to that folder. Select the My Documents group, then Select the My Favorites folder, then select the New button, then Select Folder.
Create Folder form loads. Enter a new folder name and select the OK button

Now you should see your folder in the list of sub-folders under My Favorites

Add Shortcuts to Sub folders under My Favorites. Select the Folder you want for the shortcut.

Now open the Folders group and select the report that you want to create a shortcut for.

Select the Organize button and select Copy Shortcut (Note if you select the Create Shortcut in My Favorites link that’s the folder it uses. Never use the Copy link)

Now go back to the My Documents group and you should see the folder highlighted that you select in the other step, if not make that selection again, then select the Organize button, and select the Paste Shortcut link

Your report should now show up as a Shortcut in the folder.
Delete Shortcuts and Folders and Instance that the user has created:
Delete Shortcut: Select the shortcut that you created, then select the Organize button, select Delete from the menu.

Confirmation form will appear – select the OK button to delete the shortcut.

Delete Folder you created: Select the Folder, then select Organize button, select Delete form the menu.

Confirmation form appears – select the OK button to delete the folder.

Folder removed

Create a Recurring instance: Select the report that you want to set as a recurring report. Select Schedule from the list of options. The scheduling form will appear – Select Recurrence from the list of options. Each Recurrence Option will have different settings when they are chosen so fill in what they require.
Open the list of Objects by selecting the down arrow on the Run Object box.

When Daily selected – this form appears: now set the Start Date and Time and your End Date and Time then select the Schedule button. This will schedule your report to run per your instructions.

To delete Recurrence go back in to the report history and the one marked Recurring, delete it from the Instance list. Select the Organize button, then select the Delete button.

Confirm that you want to delete the Recurrence by selecting the OK button.
**Email report information:** Highlight the report instance on the History form, Select the Send button, from the list select email. (Note: Remember the format of the report must be in a form that the receiver may open. Crystal Reports formats are not able to be opened from an email. You must change them to a PDF, Excel, Word, etc.)

The Send email form will open: enter the required information – From, To, CC or BCC, Subject, you may include a message, do not uncheck the Attachment box, etc. When you have completed the form select the Send button.

**Log off**

Make sure to Log off your InfoView account by just selecting the Log Off link on the main header of the form.

**NOTE:** WKU InfoView will log you off after six hours of inactivity.