WKU InfoView

A Web Reporting Tool at WKU

WKU ITS Application Support Revised 2024 app-support@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 $ID - U_xxxxxxx - Always$ use your Banner Account ID when asked for this information and then you're Banner Password

<u>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.</u> Some reports may require additional information before they are processed.

ter Values	
Enter Payroll Year (YYYY)	PARM_PAYYEAR
	Set to Null
Payroll Id	PARM_PAYPICT
ST	Set to Null
Enter Payroll Number	PARM_PAYNO
1	Set to Null
Enter time sheet organization code (x00000x)	PARM_TSORGN
	Set to Null
Enter approver's Banner ID (U_x000000x)	PARM_APPRVR
	Set to Null
ОК	

Enter Payroll Year (YYYY)	PARM_PAYYEAF
2014	
	Set to Null
Payroll Id	PARM_PAYPICT
ST	
	Set to Null
Enter Payroll Number	PARM_PAYNO
21	
	Set to Null
Enter time sheet organization code (x0000x)	PARM_TSORG
299999	
	Set to Null
Enter approver's Banner ID (U_xxxxxxx)	PARM_APPRV
u_bigred	
	Set to Null
OK	

Enter Banner User ID & Password

tabase Logon	
prod_db -	
Server Name	prod_db
Database Name	
User ID	u_wallysq
Password	
Password	•••••

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* 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.

Authentication: Windows AD	Log On Help	Make sure that Authentication Is Windows AD
User Name:	User Name: bgf00000 Password: Authentication: Vindows AD	NetID NetID password
Enter your user information, and click "Log On". If you are unsure of your account information, contact your system administrator.	Enter your user information, and click "Log On". If you are unare of your account information, contact your system administrator.	
WKU Infoview Welcome to WKU Infoview	WKU Infoview Welcome to WKU Infoview	

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. <u>All Faculty/Staff employees will have access to the WKU Campus Community folder once they have been activated in HR.</u> You must be granted access to any secure folders by contacting WKU ITS Application Support

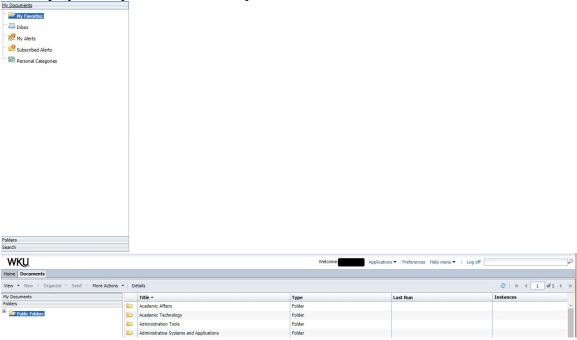
WKU.			Welcom	e: Applications • Preferences Help menu •	Log off		
Home Documents							
Wew - New - Organize - Send - More Actions - Details							
My Documents		Title A	Туре	Last Run	Instances		
Folders		Academic Affairs	Folder				
🖹 📂 Public Folders		Academic Technology	Folder				
		Administration Tools	Folder				
		Administrative Systems and Applications	Folder				

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.

WKU.		Welcome	Applications Preferences Help me	enu ▼ Log off
Home Documents				
View - New - Organize - Send - Me	ore Actions 👻 Details			82 H 4 1 of 1 ▶ H
My Documents	Title *	Туре	Last Run	Instances
Folders	Academic Affairs	Folder		A
Public Folders	Academic Technology	Folder		
	Administration Tools	Folder		
	Administrative Systems and Applicatio	ns Folder		
Home Documents	/	Welcom	Applications Preferences Help i	
View Preferences - jnn24111				? = ×
My Dc Folder B- B- B- B- B- B- B- B- B- B- B- B- B-	General	d)		
Crystal Reports	Set WKU Inforem start page: Home tab Default home tab: Select Home tab: Browse Home Tab Documents tab Hy Documents My Favorites Personal Categories My Tabox Folders Select Public Folder: Browse Folder			

The My Documents box will contain: 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). Note when the My Documents box 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 may 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.



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.

WKU
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Wedge Academy Professor Reference Hebmen | Log of _______

		Welcome Applications - Prefe	rences Help menu 🕶 🕴 Log off 📃	
uments				
	PyrBecently Viewed Documents Payroll_wte_bdo_secure.npt payroll_wte_bdo_secure.npt @ PAPERQ-Pre-requisite Errors by Coarse PAPERQ-Pre-requisite Errors by Department PAPERQ-Pre-requisite Errors by Department Sec_SubderftoperAccounts SocieD ROLL - Detail by Department	✓ 0 unread messages in Hy Inbox No unread messages	Yy Applications	
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		See more		

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:

WKU.		Welcome: Appli	ications ▼ Preferences Help menu ▼ Log of	fG
Home Documents				
View - New - Organize - Send - More Actions -	Details			
My Documents	Search Results			
Folders Search		No Items		

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 contain), date the report was created and last modification.

WKU,		WKU.				
Home Documents		Home Documents				
View - New - Organize - Send - More Actio	ns 👻 Details	View View	Details			
My Documents	Title *	Properties	Title 🔺			
Folders	Academic Affairs	Folders	Academic A			
😐 📨 Public Folders	Academic Technolo	💼 📨 Public Folders	Academic T			

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:

Home Docum	ents		
View • New	Organize Send More Actions	D	etails
	Local Document		Title 🔺
Folders	Publication		Budget
	Hyperlink		Dept_Exam
÷ 🔁		1	Faculty Cred
	Folder		

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 ITS only what you have created or generated)

WKU,							
Home Document	s						
View • New •	Org	anize 🝷	Send -	More Acti	ons 🔹	De	etails
My Documents	ð	Cut					Title 🔺
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😑 📄 Public Folder	x	Delete			-		Dept_Exam
H						8	

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

WKU					
Home Documents					
View • New • Organize	• s	Send	 More Acti 	ons 🝷	Details
My Documents	Ŀ	B	I Inbox		Title 🔺
Folders	_	E	mail		Budget
Dublic Folders		F	le Location		Dept_Exa

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

Home Documents				
View 🔻 New 👻 Organize 👻 Send 👻	Mor	e Actions 🔹 🗌 Detai	ils	
My Documents		Schedule	2 A	
Folders		Mobile Properties	get	
🖳 🛄 Public Folders		History	t_Exam	
🛨 🗁 Academic Affairs		Categories	Ity Credentials	
🔛 Academic Technology		Document Link	lty_audits	

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.

	Budget Details
	Summary
	Owner: Description: Type: Folder
WKU.	
Home Documents	
View • New • Organize • Send • More Actions • Details	

Scheduling Reports

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

WKU			W N	elcome: jnn24111 Applications • Preferences Help me	174				
ome Documents									
iew + New + Organize + Sond - Hore Actio	ns v D	ietais	/		Ø H 4	1 of 1 > 1			
y Documents		Title -	Туре	Last Run	Instances				
iders organization of constraints	-	Graduate and Doctoral	Folder						
- Doctoral Program	1	Temp	Folder						
Eaculty		Undergraduate	Folder						
Finance Secured		DETAIL - Current Students by Major With No Concentration (dw)	Crystal Reports	Sep 30, 2019 4:09 PM	1				
		DETAIL - Program Enrollment by Dept or College (dw)	Crystal Reports	Feb 18, 2020 3:02 PM	17				
Grades - End of Term	6	DETAIL - Program Enrollment by Major - Prior College (dw)	Crystal Reports		0				
Hold Plags		DETAIL - Program Enrollment by Major or Minor (dw)	Crystal Reports	Feb 25, 2020 2:16 PH	60				
HR Secure					DETAIL - Program Enrollment by Major with Cohort (dw)	Crystal Reports	Feb 18, 2020 3:31 PM	3	
- 🔛 Institutional Advancement		EHAIL - Students by major, minor or conc (dw)	Crystal Reports	Feb 28, 2020 9:46 AM	61				
- 😑 Instructors		LABELS - Enrolled Major(s) and/or Minor(s) (div)	Crystal Reports		1				
ISEC Reports	-	SUMMARY - Full/Part time summary by Major (dw)	Crystal Reports	Sep 30, 2019 2:47 PM	9				
🛞 💼 Joint Admission-Enrollment	1	-							
Learning Communities									
Military Science									
- Dini Bulletin									
🕀 😂 Program Enrollment	÷.								
Program Inventory (Majr/Minr/Conc)									
🕀 💼 Regional Campus									
18 Course Enrollment									
Residence Halls									
😥 💼 Schedule of Classes									
- Special Instructional Assignments									
Comment	*								
sarch									

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

	Title ^			Туре	Last Run	Instances
5	Graduate and Doctoral			Folder		
b	Temp			Folder		
1	Undergraduate			Fol		
	DETAIL - Current Students by Major With No Concentration (dw)		w)	Crystal Reports	Sep 30, 2019 4:09 PM	1
-	DETAIL - Program Enrollment by Dept or College (dw)			Crystal Reports	Feb 18, 2020 3:02 PM	
	DETAIL - Program Enrollment by Najor or DETAIL - Program Enrollment by Najor or DETAIL - Program Enrollment by Najor wit EMAIL - Students by major, minor or conc LABELS - Enrolled Najor(s) and/or Minor(s SUMMARY - Full/Part time summary by Ma	View		Crystal Reports		0
2		View Latest Instance	tance	Crystal Reports	Feb 25, 2020 2:16 PM	60
\$		Properties		Crystal Reports	Feb 18, 2020 3:31 PM	3
		Schedule		Crystal Reports	Feb 28, 2020 9:46 AM	61
		Mobile Properties History		Crystal Reports		1
5				Crystal Reports	Sep 30, 2019 2:47 PM	9
		Categories				
		Document Link				
		New	>			
		Organize	>			
		Send	>			
		Details				

	Values in the Menu box:
View View Latest Instance Properties	View Opens the Prompt form View Latest Instance- shows the last report ran Properties Information about when the report was created or last modified
Schedule Mobile Properties History	Schedule – Opens form to enter Prompts and Schedule the report for processing
Categories	Mobile Properties – Currently not used
Document Link	History – List of all instances that are currently available to view Categories –
New >	Currently not used
Organize >	
Send >	Document Link - Currently not used
Details	

New - Only function you may use is creating Folder under your My Favorites

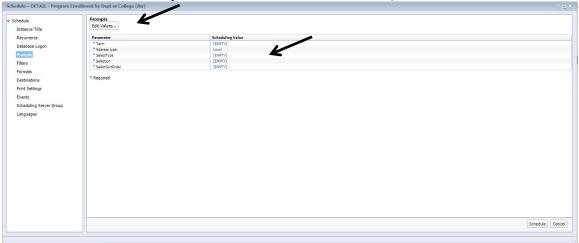
Organize - Create your Shortcuts in Favorites, Copy Shortcut or Delete

Send - Some may use the email function listed in that group

Scheduling form appears:

ichedule	Instance Title	
Instance Title	DETAIL - Program Enrollment by Dept or College (dw)	
Recurrence		
Database Logon		
Prompts		
liters		
ormats		
estinations		
vint Settings		
vents		
cheduling Server Group		
Languages		
		Schedule

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

Prompts	
Enter prompt values.	
Enter term	Term
Select Address type:	Address type
Local	
Select type:	SelectType
Enter selection based on type: (if Department, use Dept codes, i.e. ACCT; if College, use College codes, i.e. AR)	Selection
Selected Values:	

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.

	Schedu	e Cancel					
View	y – DETAIL - Program Enrollr * Organize * Send * P P P	ent by Dept or College (dw) More Actions 👻					
	Instance Time 🔻	Title	Status	Created By	Туре	Locale	Parameters
9		Title DETAIL - Program Enrollment by Dept o		Created By	Type Crystal Reports	Locale	Parameters
9	Instance Time 👻		or Success	Created By		Locale	Parameters
0	Instance Time * Feb 18, 2020 3:02 PM	DETAIL - Program Enrollment by Dept of	or Success	Created By	Crystal Reports	Locale	Parameters 202010; Local; Department(s); FIN; Cla 202010; Local; College(s); chhs; Major
	Instance Time + Feb 18, 2020 3:02 PM Feb 10, 2020 1:45 PM	DETAIL - Program Enrollment by Dept of DETAIL - Program Enrollment by Dept of	on Success	Created By	Crystal Reports Crystal Reports	Locale	Parameters 202010; Local; Department(s); FIN; Clas

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.

Histor	y – DETAIL - Program Enrollment	by Dept or (College (dw)									$? \equiv \times$
View	* Organize * Send * Mor	e Actions 🔹										
	e e e	_	<u>م.</u>								2 H	< 1 of 1 ▶ ⊨
	Instance Time •	Title	N	Status		Created By	т	ype	Lo	cale	Parameters	
\$	Feb 18, 2020 3:02 PM	DETAIL	- Program Enrollme	ent by Dept or Success			c	rystal Reports			202010; Loca	al; Department(s); FIN; Clas
8	Feb 10, 2020 1:45 PM	DETAIL	- Program Enrollme	ent by Dept or Success			c	rystal Reports			202010; Loca	al; College(s); chhs; Major
~	Feb 7, 2020 4:39 PM	DETAIL	- Program Enrollmo	ent by Dept or Success			c	rystal Reports			201930; Loca	al; College(s); SC; Classificat
\$	Feb 4, 2020 8:22 AM	DETAIL	- Program Enrollme	ent by Dept or Success			C	rystal Reports			202010; Loca	i; Department(s); ART; Cla:
8	Feb 4, 2020 8:19 AM	DETAIL	- Program Enrollmo	ent by Dept or Success			c	rystal Reports			202010; Loca	al; Department(s); ART; Maj
W	-		_					Welcome	Applications Prefere	ences Help me	enu 🕶 📔 Log off	
Home	Documents DETAIL - Program En	, P + 0										
File -	00-302	1 of 53	· 100% ·									
đã	Group Tree 《											
	DETAIL - Program Enrollment by Dep											
E				2/28/2020	etube		TERN KENTUCK	Y UNIVERSITY 0 IN SPECIFIED DEPA	DTMENT(C)		Page 1 of 53	
					STUDE	INTS ENROLLED	Sorted by Classificat		KIMENI(5)			
							FIN - Find					
				Name		Phone					Primary_Advisor	
				ID		Email		Primary Major 1 Primary Major 2	Sec. Major 1 Sec. Major 2		Secondary Advisor Cum Earned Hrs	
				Class/Type Ethnicity	Local Address	Credit Hours Ctlg Term / G	rad Term / Pgm Stat	Minor(s)/Concentration(s)	Minor(s)/Conce	ntration(s).	Cum GPA	
										_		
											1000	

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

	Prompts		
	Edit Values		
e Title			
ence	Parameter	Scheduling Value	
se Logon	* Term	[EMPTY]	
	* Address type	Local	
5	* SelectType	[EMPTY]	
	* Selection	[EMPTY]	
s	* SelectSortOrder	[EMPTY]	
	* Required		
tions			
ttings			
ling Server Group			
ges			
			Schedule

Possible type of Parameter boxes: Enter only one Value: Select OK button

View	Prompts	×
My D Folde	Enter prompt values.	
	Enter term Term	
	OK Cancel	

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

Viev	Prompts	×	×
My I Fold	Enter prompt values.		
	Select sort order:	SelectSortOrder	
	Classification GPA Classification and GPA		
	Major Name	OK Cancel	

Enter multiple values: Enter criteria in left box then select the Add descrete 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

Prompts	
Enter prompt values.	
Enter selection based on type: (if Department, use Dept codes, i.e. ACCT; if College, use College codes, i.e. AR)	Selection
acct	
	OK Cancel

Edit Values			•
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		K	
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* Deputed			
Pringue du			
			\ .
			Schedule Cancel
	Entropy of the second s	Personator Exheduling Value 1 20100 2 20100 4 Sectory Sectory 4 Sectory Sectory	Extending Volu 1000 2000 * Sent Span 2000 * Sent Span Spannel * Sent Spannel Spannel

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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.

Hi	tory – ADMIT - students Summary by Department 2 = X								
N	lew Organize Serd Serd								
E	¶ । । । हिंदि								
	Instance Time 🔻	Title	Status	Created By	Туре	Locale	Parameters		
4	Oct 17, 2014 1:07 PM	ADMIT - students Summary by D	Success		Crystal Reports		201430; MATH		

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

Histo	ory – ADMIT - students Summa	ry b	y Department		-					? = ×
View	v • Organize • Send •	Mor	e Actions	/						
•			Run Now							
	Instance Time *				Status	Created I	Зу	Туре	Locale	Parameters
\$	Oct 17, 2014 1:31 PM		Document Link	ary by De	Success			Crystal Reports		201430; MATH
ş	Oct 17, 2014 1:22 PM	AD	MIT - students Sumn	ary by De	Success			Crystal Reports		201430; MATH
8	Oct 17, 2014 1:07 PM	AD	MIT - students Sumn	ary by De	Success			Crystal Reports		201430; MATH

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. <u>Watch this for all reports</u>.

9	🖻 🖻 🖻						
	Instance Time 🔻	Title	Status	Created By	Туре	Locale	Parameters
2	Oct 17, 2014 1:21 PM	ADMIT - students Summary	by De Running		Crystal Reports		201430; MATH
ł	Oct 17, 2014 1:07 PM	ADMIT - students Summary	by De Success		Crystal Reports		201430; MATH

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

	🖓 4 4 1 of 1 ≽						
	Instance Time		Status	Created By	Туре	Locale	Parameters
0	Oct 17, 2014 1:34 PM	ADALT. students C	ummary by De Success	Created by	Crystal Reports	Locale	201430: MATH
							201450; MATH
×.	Oct 17, 2014 1:31 PM	ADMIT - students Si	ummary by De Success		Crystal Reports		201430; MATH
9	Oct 17, 2014 1:22 PM	ADMIT - students Si	ummary by De Success		Crystal Reports		201430; MATH
.0	Oct 17, 2014 1:07 PM	ADMIT - students St	ummary by De Success		Crystal Reports		201430; MATH

Report displayed

1	1 2									
Home	Documents ADMIT - students Su	+ Q								
File -	00-30200	1 of 1	• 100% ·							
đã			Major Code	Freshman	New Grad	Other	Readmit	Transfer	Total	
			049 Mathematics	0	2	0	0	1	3	
			085 Mathematics	0	6	3	0	0	9	
			528P Mathematics-Prep	21	0	0	0	3	24	
			728P Mathematics-Prep	9	0	0	0	2	11	
			730 Middle Grades Mathematics	0	0	0	0	2	2	
			730P Middle Grades Mathematics-P	12	0	0	4	12	28	
			Total	42	8	3	4	20	77	

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.

WKU.	Welcome: jon24111 Applications + Preferences Help menu + Log off
Home Documents DETAIL - Program En 🖉 🛥 😂	
File - 🔾 🔾 - 📑 🍣 🚢 🕞 🍋 1 of 53 -	10% -

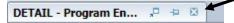
View link selection

	Title *			Туре	Last Run	Instances
	Graduate and Doctoral			Folder		
	Temp			Folder		
	Undergraduate			Folder		
۵.	DETAIL - Current Students by Major With No	Concentration (d	w)	Crystal Reports	Sep 30, 2019 4:09 PM	1
-	DETAIL - Program Enrollment by Dept or Coll	leae (dw)	_	Crystal Reports	Feb 18, 2020 3:02 PM	
5	DETAIL - Program Enrollment by Major - P	View		Crystal Reports		0
5	DETAIL - Program Enrollment by Major or	View Latest Ins	tance	Crystal Reports	Feb 25, 2020 2:16 PM	60
5	DETAIL - Program Enrollment by Major wit	Properties		Crystal Reports	Feb 18, 2020 3:31 PM	3
5	EMAIL - Students by major, minor or conc	Schedule		Crystal Reports	Feb 28, 2020 9:46 AM	61
5	LABELS - Enrolled Major(s) and/or Minor(s	Mobile Properti	es	Crystal Reports		1
5	SUMMARY - Full/Part time summary by Ma	History Categories		Crystal Reports	Sep 30, 2019 2:47 PM	9
		Document Link				
		New	>			
		Organize	>			
		Send	>			
		Details				
	-					

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

Enter term	Te
Select type:	SelectTy
	e Dept codes, i.e. AC(7; if College, use College codes, i.e. AR) Selecti Selected Values:
	Remove Al
Select sort order:	SelectSortOrd
	• OK

Report may open in the same window or in another 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



Your report will be exported to a PDF file.



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. You would right click on the report, click Schedule. 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. (Remember to make sure your Prompts where completed before Scheduling.)

Schedule	Formats	
Instance Title Recurrence Database Logon Prompts Filters Fintes Destinations Print Settings Events Scheduling Server Group	Format Options for Selected Document: Crystal Reports Crystal Reports Crystal Reports Crystal Reports Crystal Reports Microsoft Word (97-2003) Microsoft Word (97-2003) POP Rich Text Format (RTF) Microsoft Word - Editable (RTF) Plain Text Text Separated Text Separated Text Separated Microsoft Word - Editable (RTF) Plain Text Text Separated Text Separated Separated Values (CSV) Volu	
Languages		
		Schedule

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.

me	Documents								
History – ADMIT - students Summary by Department									
	View • Organize • Send •	More Actions							
1	P P P P	Run Now					2 H ∢ 1 of 1 ▶ H		
	Instance Time V	Reschedule	Status	Created By	Туре	Locale	Parameters		
	Cct 17, 2014 1:34 PM	Document Link	and the second se	created by	Crystal Reports	Locule	201430; MATH		
	S Oct 17, 2014 1:31 PM	ADMIT - students Summary	by De Success		Crystal Reports		201430; MATH		
	Oct 17, 2014 1:22 PM	ADMIT - students Summary	by De Success		Crystal Reports		201430; MATH		
	S Oct 17, 2014 1:07 PM	ADMIT - students Summary			Crystal Reports		201430: MATH		

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

, н	History – ADMIT - students Summary by Department ? =									
View • Organize • Send • More Actions •										
[🖻 🖻 🖻 🖻						🥶 H ┥ 🚺 of 1 🕨 H			
	Instance Time 🔻	Title	Status	Created By	Туре	Locale	Parameters			
	Oct 23, 2014 9:48 AM	ADMIT - students Summary by De	Pending		Crystal Reports		201430; MATH			
	Oct 23, 2014 9:48 AM	ADMLT * Students Summary by De								
	Oct 23, 2014 9:48 AM Oct 17, 2014 1:34 PM	ADMIT - students Summary by De			Crystal Reports		201430; MATH			
	-		Success		Crystal Reports Crystal Reports		201430; MATH 201430; MATH			
	Cct 17, 2014 1:34 PM	ADMIT - students Summary by De	Success Success							

		4 1 (4 D 1 1 1 1 1
Re-Schedule a report b	y selecting the More Actions button,	then select the Reschedule link

w F	listory – ADMIT - students Summa	ry by Department					
	,,	., _,,,					1 _ 00
1ē	View • Organize • Send •	More Actions *					
=		Run Now					@ of 1 >
	Instance Time *	Reschedule	Status	Created By	Туре	Locale	Parameters
	🔏 Oct 23, 2014 9:48 AM	Document Link	mary by De Success		Crystal Reports		201430; MATH
10	Oct 17, 2014 1:34 PM	ADMIT - students Sum	mary by De Success		Crystal Reports		201430; MATH
	S Oct 17, 2014 1:31 PM	ADMIT - students Sum	mary by De Success		Crystal Reports		201430; MATH
	Oct 17, 2014 1:22 PM	ADMIT - students Sum	mary by De Success		Crystal Reports		201430; MATH
	Oct 17, 2014 1:07 PM	ADMIT - students Sum			Crystal Reports		201430; MATH

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.

	students Summary by Department Instance Title ADMIT - students Summary by Department	? = X
Recurrence Database Lo Prompts Filters Formats Destinations Print Setting Events Scheduling S Languages	Group	
Search	Total: 10 items	Schedule Cancel

History –Will list of all Instances currently in history for that report. 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.

Title 🔺		Туре		
Graduate and Doctoral		Folder		
Temp		Folder		
Undergraduate		Folder		
DETAIL - Current Students by Major With No Concentrat	tion (dw)	Crystal Reports		
DETAIL - Program Enrollment by Dept or College (dw		Crystal Reports		
DETAIL - Program Enrollment by Major - Prior College	View View Latest Instance	Crystal Reports		
TAIL - Program Enrollment by Major or Minor (dw)	Properties	Crystal Reports		
DETAIL - Program Enrollment by Major with Cohort (Schedule	Crystal Reports		
EMAIL - Students by major, minor or conc (dw)	Mobile Properties	Crystal Reports		
LABELS - Enrolled Major(s) and/or Minor(s) (dw)	History	Crystal Reports		
SUMMARY - Full/Part time summary by Major (dw)	Categories	Crystal Reports		
	Document Link			
	New >			
	Organize >			
	Send >			
	Details			

History Page

1	🖻 🖻 🛃	🥮 H - 4 🚺 of 1 > → H					
	Instance Time *	Title	Status	Created By	Туре	Locale	Parameters
	Feb 18, 2020 3:02 PM	DETAIL - Program Enrollment by Dept of	Success		Crystal Reports		202010; Local; Department(s); FIN; Cla
1	Feb 10, 2020 1:45 PM	DETAIL - Program Enrollment by Dept of	Success		Crystal Reports		202010; Local; College(s); chhs; Major
2	Feb 7, 2020 4:39 PM	DETAIL - Program Enrollment by Dept of	Success		Crystal Reports		201930; Local; College(s); SC; Classific
1	Feb 4, 2020 8:22 AM	DETAIL - Program Enrollment by Dept of	Success		Crystal Reports		202010; Local; Department(s); ART; C
2	Feb 4, 2020 8:19 AM	DETAIL - Program Enrollment by Dept of	Success		Crystal Reports		202010; Local; Department(s); ART; M
2	Feb 4, 2020 8:18 AM	DETAIL - Program Enrollment by Dept or	Failed		Crystal Reports		; Local
1	Jan 23, 2020 4:17 PM	DETAIL - Program Enrollment by Dept of	Success		Crystal Reports		202010; Local; College(s); AR; Classifi
1	Jan 22, 2020 2:47 PM	DETAIL - Program Enrollment by Dept of	Success		Crystal Reports		202010; Local; Department(s); MUS; M
1	Jan 14, 2020 2:32 PM	DETAIL - Program Enrollment by Dept of	Success		Crystal Reports		202010; Local; Department(s); FIN; M
1	Oct 29, 2019 9:31 AM	DETAIL - Program Enrollment by Dept of	Success		Crystal Reports		201930; Local; Department(s); ENG; M
2	Sep 30, 2019 12:08 PM	DETAIL - Program Enrollment by Dept of	Success		Crystal Reports		201930; Local; Department(s); ECON;
2	Sep 25, 2019 10:20 AM	DETAIL - Program Enrollment by Dept of	Success		Crystal Reports		201930; Local; Department(s); PHIL; M
2	Sep 24, 2019 5:12 PM	DETAIL - Program Enrollment by Dept of	Success		Crystal Reports		201930; Local; Department(s); ACCT;
2	Sep 23, 2019 9:48 AM	DETAIL - Program Enrollment by Dept of	Success		Crystal Reports		201930; Local; Department(s); ENG; C
2	Sep 19, 2019 9:19 AM	DETAIL - Program Enrollment by Dept of	Success		Crystal Reports		201930; Local; Department(s); ART; M
9	Sep 19, 2019 9:18 AM	DETAIL - Program Enrollment by Dept or	Failed		Crystal Reports		201930; Local; Department(s); ART
2	Sep 17, 2019 2:14 PM	DETAIL - Program Enrollment by Dept of	Success		Crystal Reports		201930; Local; Department(s); 288; N

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.

nts 😥 Create Shortcut in My Favorites	Title	• /	Туре	Last Run
K Cut	Gradu	ate and Doctoral	Folder	
ISEC Copy	Temp		Folder	
Join Copy Shortcut	Under	graduate	Folder	
Lear X Delete	DETAI	I Current Students by Major With No Concentration (dw)	Crystal Reports	Sep 30, 2019 4:09 PM
Military Science	DETAL	L - Program Enrollment by Dept or College (dw)	Crystal Reports	Feb 18, 2020 3:02 PM
Mini Bulletin	DETAI	L - Program Enrollment by Major - Prior College (dw)	Crystal Reports	
	DETAI	L - Program Enrollment by Major or Minor (dw)	Crystal Reports	Feb 25, 2020 2:16 PM
	DETAI	L - Program Enrollment by Major with Cohort (dw)	Crystal Reports	Feb 18, 2020 3:31 PM
Program Inventory (Majr/Minr/Conc)	S EMAIL	- Students by major, minor or conc (dw)	Crystal Reports	Feb 28, 2020 9:46 AM
Regional Campus	🔊 LABEL	S - Enrolled Major(s) and/or Minor(s) (dw)	Crystal Reports	
Registration & Course Enrollment	SUNM	ARY - Full/Part time summary by Major (dw)	Crystal Reports	Sep 30, 2019 2:47 PM
Residence Halls	1.1			
Schedule of Classes				
Special Instructional Assignments				
Staff Council				

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.

Documents	bounded						
New Organize Send More Actions	- 0	etails					
un 🛍 Local Document		Title *	Туре				
2 Publication		Graduate and Doctoral	Folder				
🐁 Hyperlink		Temp	Folder				
Folder Nent		Undergraduate	Folder				
Learning Communities	-	DETAIL - Current Students by Major With No Concentration (dw)	Crystal Reports				
Military Science		DETAIL - Program Enrollment by Dept or College (dw)	Crystal Reports				
📁 Mini Bulletin		DETAIL - Program Enrollment by Major - Prior College (dw)	Crystal Reports				
🐮 🗁 Program Enrollment		DETAIL - Program Enrollment by Major or Minor (dw)	Crystal Reports				
		DETAIL - Program Enrollment by Major with Cohort (dw)	Crystal Reports				
Program Inventory (Majr/Minr/Conc)		EMAIL - Students by major, minor or conc (dw)	Crystal Reports				

Create Folder form loads. Enter a new folder name and select the OK button

Create Folder X
Enter a new folder name: Special Info
OK Cancel

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

Documents		Title ^	Туре	Last Run	Instances
My Favorites	-	Special Info	Folder		
Inbox	81	Shortcut to DETAIL - Current Students by Major With No Concentration (dw)	Shortcut	Sep 30, 2019 4:09 PM	1
My Alerts					
Subscribed Alerts					
Personal Categories					

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

ew • New • Organize • Send • More					🥵 🕅 🖣 1 of 1
Documents		Title ^	Туре	Last Run	Instances
My Favorites	<u> </u>	Special Info	Folder		
Inbox	\$	Shortcut to DETAIL - Current Students by Major With No Concentration (dw)	Shortcut	Sep 30, 2019 4:09 PM	1
P My Alerts					
Subscribed Alerts					
Personal Categories					
	1				

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)

cuments 💼 Create Shortcut in My Favorites		Title ^	Type	
K Cut		Graduate and Doctoral	Folder	
Doct Docy		Temp	Folder	
Fact De Copy Shortcut	-	Undergraduate	Folder	
Fina X Delete	- 1	DETAIL - Current Students by Major With No Concentration (dw)	Crystal Reports	
		DETAIL - Program Enrollment by Dept or College (dw)	Crystal Reports	
Grades - End of Term		DETAIL - Program Enrollment by Major - Prior College (dw)	Crystal Reports	
Hold Flags	-	DETAIL - Program Enrollment by Major or Minor (dw)	Crystal Reports	
HR Secure	-	DETAIL - Program Enrollment by Major with Cohort (dw)	Crystal Reports	
Institutional Advancement		EMAIL - Students by major, minor or conc (dw)	Crystal Reports	
- Instructors		LABELS - Enrolled Major(s) and/or Minor(s) (dw)	Crystal Reports	
Instructors		SUMMARY - Full/Part time summary by Major (dw)	Crystal Reports	

Now go back to the My Documents group and you should see the My Favorites folder highlighted. Click on Organize and Paste Shortcut. This will go into your My Favorites.

		Title A	Туре
My Favorites		Special Info	Folder
💴 Special Info	2	Shortcut to DETAIL - Current Students by Major With No Concentration (dw)	Shortcut
Inbox			
My Alerts			
Subscribed Alerts			

Or click on the folder you want to paste the short to and paste there.

iew • New •	Organize - Send - Me	e Actions 🔻 Details
y Documents My Favorites		Title *
My Alerts	X Delete	
🗟 Personal Cat	egories	

Your report should now show up as a Shortcut in the folder you pasted it to.



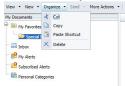
Delete Shortcut: Select the shortcut that you created, then select the Organize button, select Delete from the menu

View • New •	Org	anize • Send • More Actions	• D	etails
My Documents	R	Create Shortcut in My Favorites		Title *
· 📔 My Favorites	ð	Cut	4	Shortcut to DETAIL - Program Enrollment by Major - Prior College (dw)
🔲 Special I		Сору		
Inbox	D	Copy Shortcut		
My Alerts	1	Paste Shortcut		
Subscribed A	×	Delete		

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



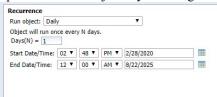
Confirmation form appears - select the OK button to delete the folder.



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.

Schedule	Recurrence
Instance Title	Run object: Now 🔻
Recurrence	Object will run now.
Database Logon	
Prompts	
Filters	
Formats	

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 you 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.

Delete	\boxtimes
Are you sure you want to delete the selected items: ADMIT - Department	students Summary by
	OK Cancel

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.

		Add	•	
		Add	•	
		Add		
		Add		
		Add	-	
Add	•			~
ttachment				
e:	Concepted Name			
	Generated Name		Add Placeholde	3
	Add	Add	Add Add Add	Add •

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

WKU		,	Welcome: Applications -	Preferences Help menu ▼ Log off [م(
Home Documents					
View • New • Organize • Send • More Actions	Details				2 H → 1 of 1 → H
My Documents	Title ^	Туре	Last Run	I	nstances

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

Helpful List of Codes:

Code *	Description *	
00	No College Designated	
99	Not used in standing-self rptd	
AR	Arts & Letters	
BU	Business	
CC	Commonwealth School	
ED	Education & Behavioral Science	
EX	Exploratory Studies	
GC	The Graduate School	
HH	Health and Human Services	
IS	University College	
LI	University Libraries	
MC	Exploratory Study *Do Not Use*	
SC	Science and Engineering	
XL	Extended Learning & Outreach	

College Codes: (STVCOLL in Banner)

Department Codes: (STVDEPT in Banner)

Code *	Description *						
IES	*Inactive: ESLI Program						
MGSE	*Inactive: Mid Grdes & Sec Edu						
AOS	*Inactive:Admin Office Sys						
AFAM	*Inactive:African Am Studies						
99CC	*Inactive:Coll CC:Interdisc/Un						
HEFL	*Inactive:Consumer &Family Sci						
ELED	*Inactive:Elementary Education						
WOMN	*Inactive:Gender & Women's Stu						
GERO	*Inactive:Gerontology						
ADM	*Inactive:Leadership Dynamics						
MACS	*Inactive:Math & Compture Sc						
MLIS	*Inactive:Modern Lng & Intrcul						
SASW	*Inactive:Sociology						
SIP	*Inactive:Special Instruct Prg						
TCHR	*Inactive:Teacher Education						
TECH	*Inactive:Technology Division						
HEAL	*inactive:Health Sciences Div						
ACAF	Academic Affairs						
ACMS	Academy of Math & Science						
ACCT	Accounting						
ACAD	Advising & Career Development						
AGRI	Agriculture and Food Science						
AERO	Air Force Rotc (Aerospace Stud						
ALHL	Allied Health						
CFS	Applied Human Sciences						
AMS	Architectural & Manufacturing						
ART	Art						
BIOL	Biology						
BA	Business Administration						
CHEM	Chemistry						
99AR	Coll AR:Interdiscpl/Undeclared						

99BU	Coll BU:Interdiscpl/Undeclared					
99ED	Coll ED:Interdiscp/Undeclared					
99EX	Coll EX: Exploratory Studies					
99HH	Coll HH:Interdiscp/Undeclared					
99SC	Coll SC:Interdiscp/Undeclared					
99IS	Coll UC: Deans Office					
COMM	Communication					
CD	Communication Sci & Disorders					
CIT	Computer Information Tech					
CS	Computer Science					
XC	Continuing Education					
COOP	Cooperative Education					
CNSA	Counseling and Student Affairs					
CI	Curriculum and Instruction					
DCS	Diversity & Community Studies					
XXXX	Double Major - Not in Program					
ECON	Economics					
EALR	Ed Adm, Leadership & Research					
EDLD	Educational Leadership					

Major, Minor, Concentration Codes (STVMAJR in Banner)

- Not a full list
- If you do not have your department code and do not have access to Banner, please email us and we will gladly provide that code.

Major Code *	Description *	CIPC	Major	Minor	Concentration	Occupation	Financial Aid Eligibility
0000	Major Not Declared		V				✓
0001	Undeclared/Non-degree: BU	900000	~				
0002	Undeclared/Non-degree: AR	900000	~				
0003	Undeclared/Non-degree: HH	900000	~				
0004	Undeclared/Non-degree: SC	900000	~				
0005	Undeclared/Non-degree: ED	900000	~				
0006	Undeclared/Non-Degree: UC	900000	~				
001	Agriculture			~			
0010	Educational Leadership	130401	~				~
0011	Nursing Practice	513818	~				v
0012	Organizational Communication	090101	~				v
0013	Physical Therapy	512308	~				~
002	Art Education			~			
003	Biology			~			
004	Business Education			~			
005	Chemistry			~			
007	Economics			~			
008	English			~			
009	Folk Studies			~			
010	French			~			

Ethnic Codes (STVETHN in Banner) Ethnic Code Validation (STVETHN)

Criteria	Q
Code	Description
1	Alien/Non-Resident
2	Black or African-American
3	American Indian/Alaskan
4	Asian/ Pacific Islander
5	Hispanic
6	White, Non-Hispanic
7	Non-reported
8	Two or more Races
9	Hawaiian/Pacific Islander

Gender Identity (GTVGNDR in Banner)

Code	Description
1	Female
2	Male
3	Transgender Female
4	Transgender Male
5	Gender Non-binary/Non-conforming
6	Write-In

Personal Pronouns (GTVPPRN in Banner)

Code	Description
1	He/Him/His
2	She/Her/Hers
3	They/Them/Theirs
4	Write-In

Religion (STVRELG in Banner)

Code	Description
02	Assembly of God
05	Baptist
10	General Baptist
15	Catholic
20	Christian
23	Disciples of Christ
25	Church of Christ
28	United Church of Christ
30	Christian Science
40	Episcopal
43	Jehovah Witness
45	Jewish
50	Lutheran
52	Mennonite
55	Methodist
56	Mormon
57	Muslim
58	Orthodox
60	Nazarene
65	Pentecostal

70	Presbyterian
75	Cumberland Presbyterian
77	Quaker
85	Seventh-Day-Adventist
86	Unitarian
87	Church of God
98	Other
99	Not Affiliated

Legacy (STVLGCY in Banner)

Code	Description
1	1st Generation College Student
2	Not 1st Generation College Stu
F	Father
G	Grandparent
M	Mother
N	Not reported
Р	Both Parents
S	Step-Parent
Υ	Alumnus in Family