

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 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.

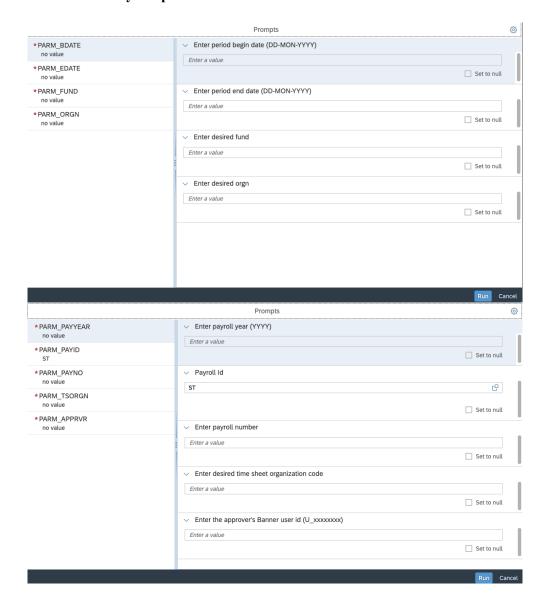
Payroll ID – Two position field that is used to identify the type of payroll information that a person is wanting.

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

$\underline{HR/Advance}$ use the report title to process information: Some reports may require additional information before they are processed.



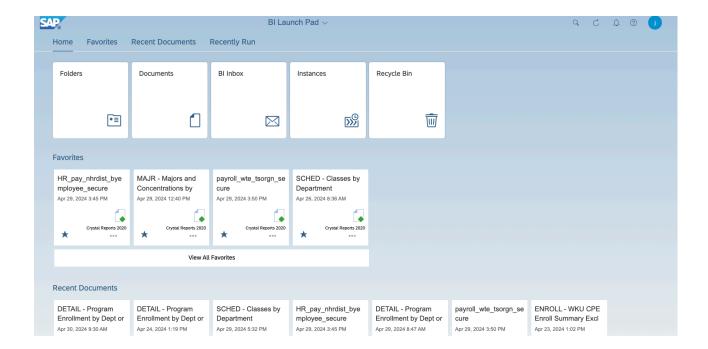
WKU InfoView

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

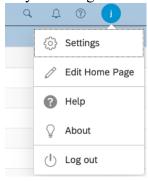
Enter the following URL in the web browser: http://infoview.wku.edu Press enter. The Log on to InfoView box will appear. Enter your NetID in the Username box -- (example – bbb00000) and NetID password in the Password box. Make sure that the Authentication box has Windows AD listed. Select the Log On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



When logged in, the InfoView Folders page should display – with the Home Page appearing. <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.



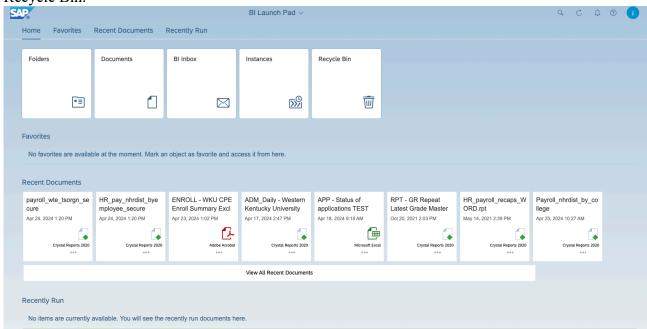
The Home Page is the defaulted page that appears when you access InfoView, the layout may be changed. See the section for Changing User Preferences in the manual.



You will have a Search function page 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. This function is present in each of the categories.



Home: This function contains access to the Folders, Documents, BI Inbox, Instances, and Recycle Bin.

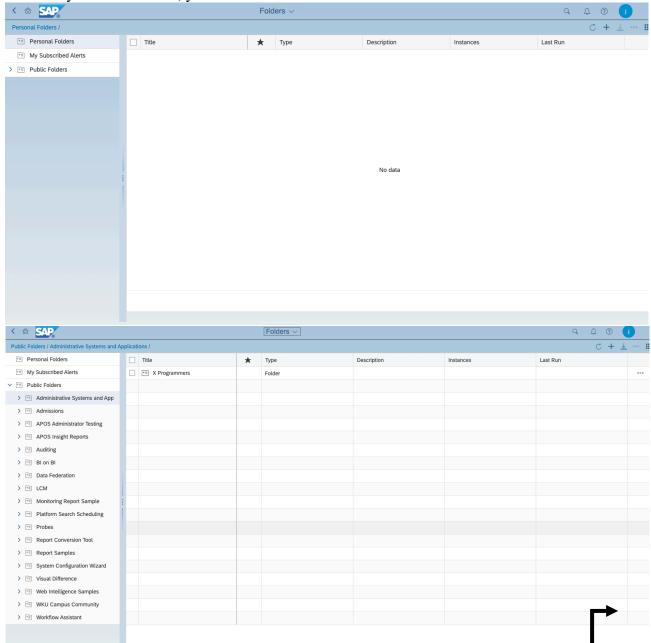


The Home Landing Page allows you to view your Favorites, Recent Documents that you have opened, and the Recently Run reports. We will use the Folders to navigate and run the reports.

Navigating InfoView

Folders: Click on the Folders and this will display Public Folders with WKU Campus Community folder and the Student Folder if you have been assigned to a folder that may be unique to your department.

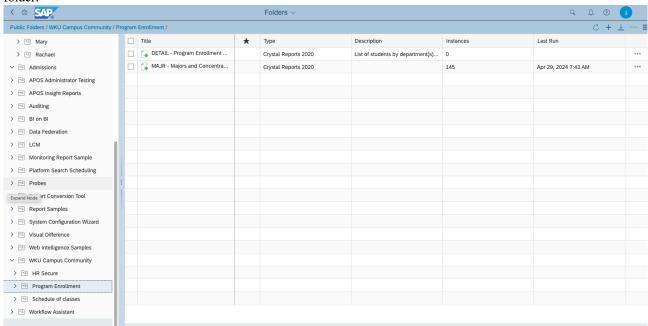
• After you click Folders, you will click on Public Folders.



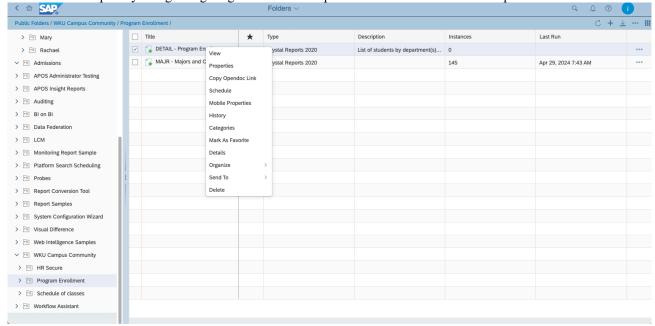
- ** It is important to remember that to click on a Folder, you will do a short Single click the folder. A long click could cause you to open a folder within that folder or run a report accidentally.
- ** You may drag the horizontal lines between the columns to resize the column to see additional information in the column.
- ** You will use the > to expand any Folder.

Scheduling Reports

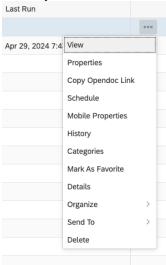
Start by finding the folder that contains the report that you want to schedule. For this example, we will use the Program Enrollment folder. In the right panel you will see a list of any sub-folders and/or reports in that folder.



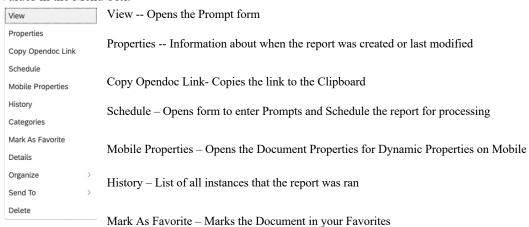
Now select the report by doing a single right click on the report title and the Menu box will open.



You may also use the ... instead of doing the Right Click to Schedule.



Values in the Menu box:

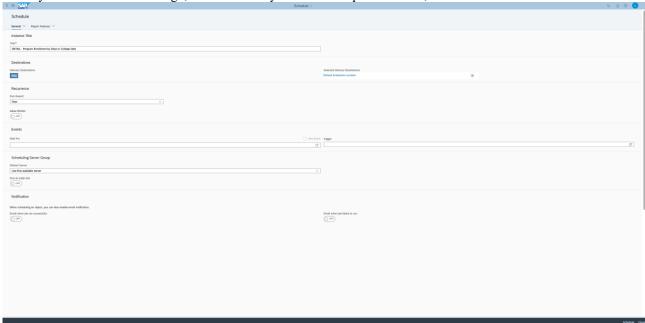


Details - Shows the details of the Report

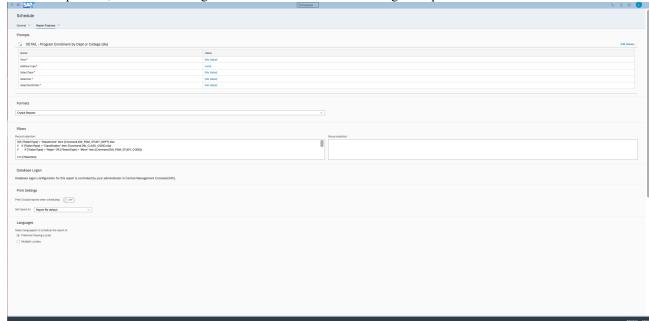
Delete- currently not in use

Scheduling form will appear with two separate boxes to navigate.

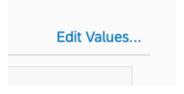
The General window gives details for the title of the report, where the report is located, destinations of where you want to add for it to go, the recurrence you want the report to be ran, etc.:



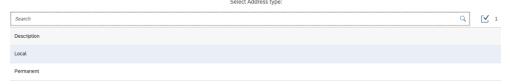
The Report Features window is the location where you will input the prompts, select the format you wish to have the report ran, as well as some general information used for running the report:

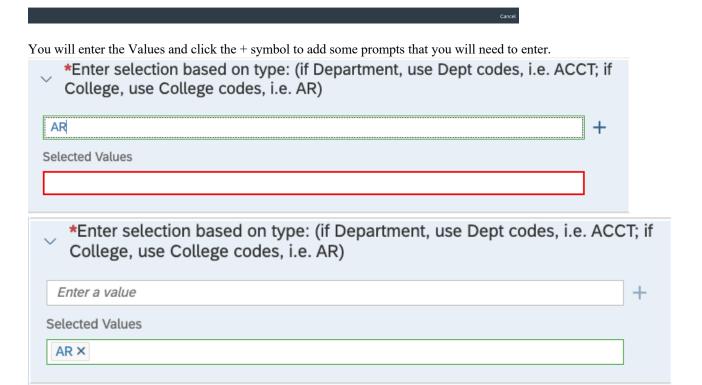


You can individually click through the prompts or use the Edit Values to input all prompts at once.

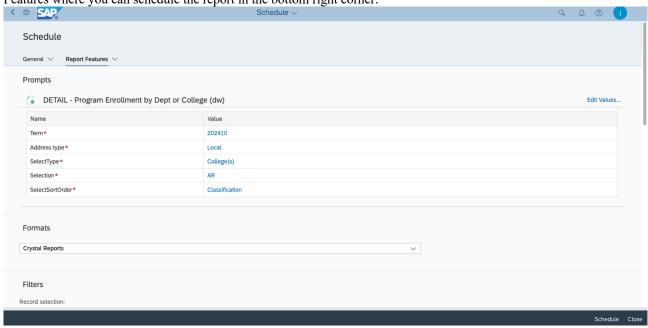


Anything with a Selection menu will have that you will need to click on to have the menu open and make the appropriate selection.

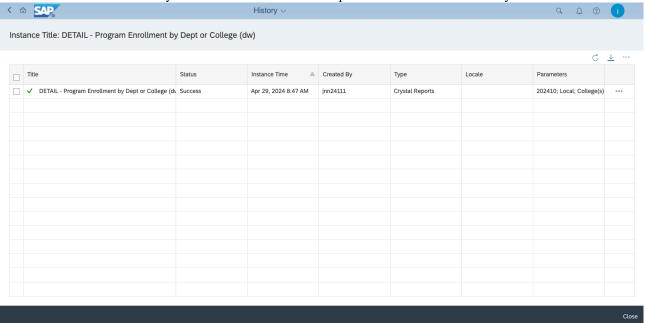




After inputting prompts, you will click OK in the bottom right corner, and it will return you to the Report Features where you can schedule the report in the bottom right corner.

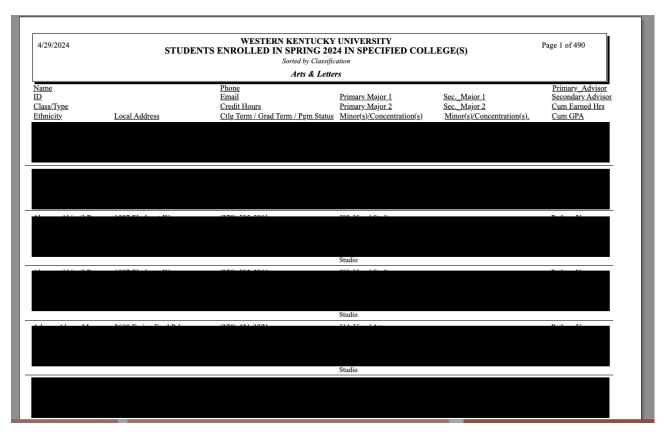


Then the History form opens with the report instance showing. It will process from Pending, to Running to either Success or Failed. Note you do not have to refresh the report it will refresh automatically.



To see the report information either select the Title and the report will open or click the ... and select View.

Report displayed will look like:



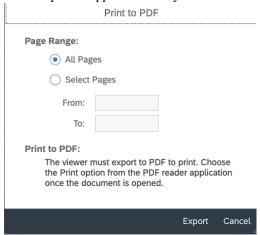
When finished close the report by the report title at the top and clicking the X.

**Please note, if you do not close the report, should you click on the report, it will keep that instance open. This may cause issues with your HR Secure reports that you are used to clicking on to input the prompts.

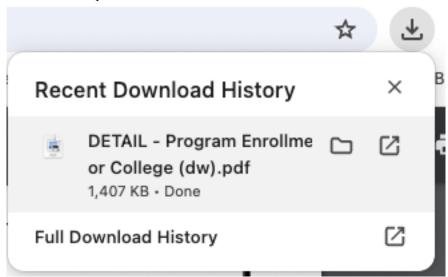


Options for the Report

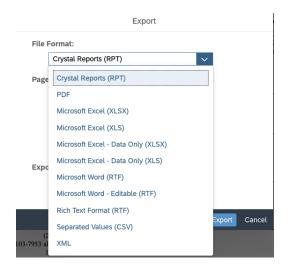
Print setup form appears – Print your document as you print any document



Your report will be exported to the file format it was ran. Check your Recent Download History or the menu bar at the top of the browser.



If you select the ____, you can export the report and change the File Format. Please note, the report may only function properly in the format in which it was original created in.



You may select the to favorite the report. This will add this report to your Favorites. Please note, this can also be down in the folder by the report in the Favorite column.

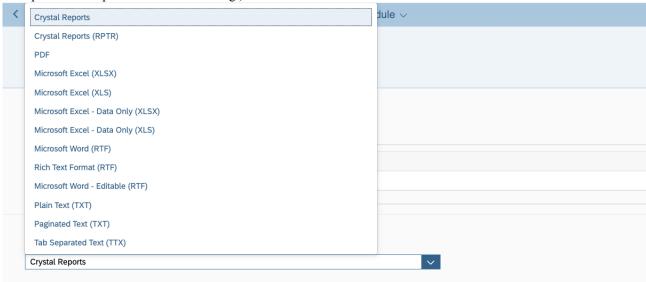
You may use the page navigation to move between the pages, or easily to go to a page. The scroll functions also move between the pages.

You may change the percentage in which the report is viewed by changing the percentage, clicking the Fit to Width or Fit to Page, or Full Screen (esc to exit Full Screen).

Changing the Format of a report

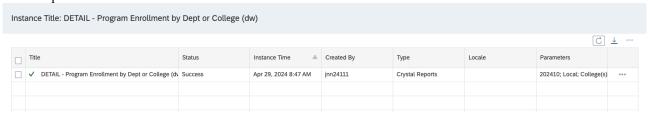
Most reports are created in a Crystal Reports format unless the requestor requested the report to be created in another format. It is simple to change the format of a report prior to scheduling the report.

You would right click on the report, click Schedule. From the Schedule menu select the Report Features, then select the drop-down menu in Formats, 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 were completed before Scheduling.)

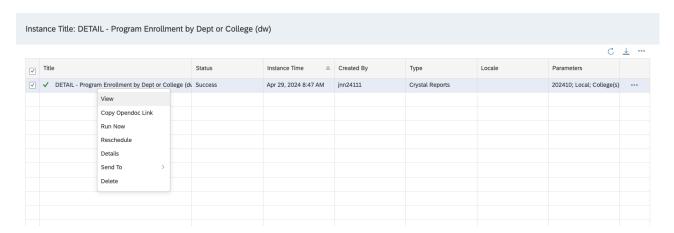


ReSchedule, Run Now, Sending and Deleting a Report

Run Now –You must have run a report by selecting the report, right click to Schedule or use the ... to Schedule, then input your prompts again. This will send the report to re-run with the prompts that you have listed in the Parameters box. To view those instances, right click or use the ... and click the History to view the prior instances ran.



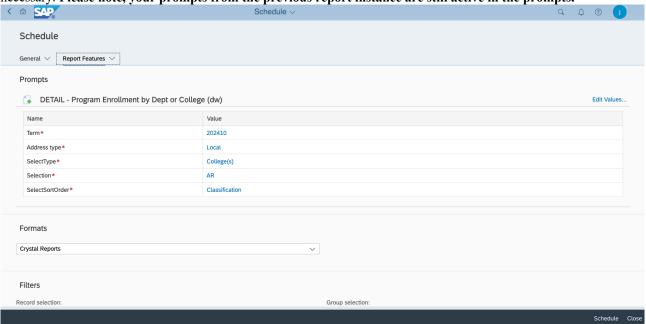
From the History (Instance), you can right click on a report that you have ran and click reschedule, run now, or send to. You may Delete the instance should you need to remove that instance record that you ran.



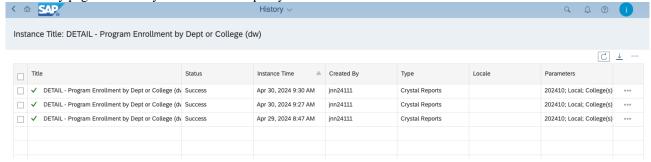
The Run Now option will re-run the report based on the prompts (parameters) that you used when you first ran the report.



The re-schedule option will take you to the Schedule box where you can change the prompts and format if necessary. Please note, your prompts from the previous report instance are still active in the prompts.



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. It will take you to the History page and allow you to select the report you scheduled.



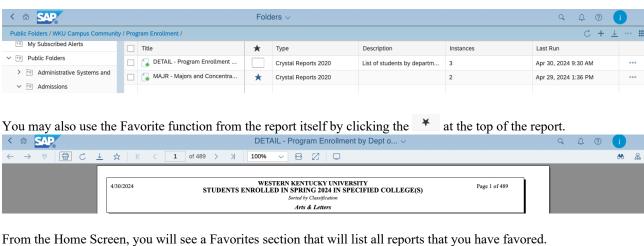
History –Will list of all Instances currently for that report by any user that has ran the report and the parameters (prompts) they have used, as well as the date and time they ran the report.

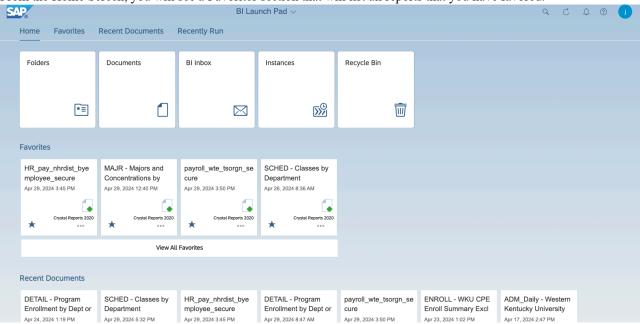
Using the Home Screen:

Favorite Reports

You may create shortcuts to reports that you use frequently by using the Favorite option.

To create a shortcut in Favorites, find the report in your list of available reports and click the ** column to favorite.





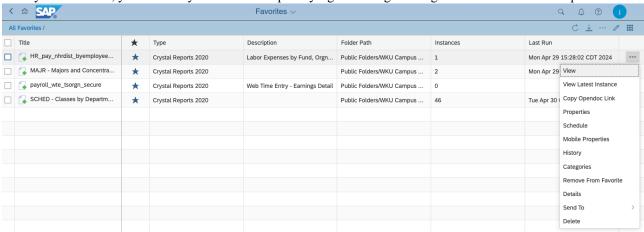
If you have multiple Favorite reports, you will click the View All Favorites to see the list.

<	< ☆ SAP Favorites ∨				9 4 0			
All Favorites / C						· III		
	Title	*	Туре	Description	Folder Path	Instances	Last Run	
	HR_pay_nhrdist_byemployee	*	Crystal Reports 2020	Labor Expenses by Fund, Orgn	Public Folders/WKU Campus	1	Mon Apr 29 15:28:02 CDT 2024	000
	MAJR - Majors and Concentra	*	Crystal Reports 2020		Public Folders/WKU Campus	2	Mon Apr 29 13:36:02 CDT 2024	000
	payroll_wte_tsorgn_secure	*	Crystal Reports 2020	Web Time Entry - Earnings Detail	Public Folders/WKU Campus	0		000
	SCHED - Classes by Departm	*	Crystal Reports 2020		Public Folders/WKU Campus	46	Tue Apr 30 09:33:04 CDT 2024	000

Or if you hit the , you will see a grid of the reports.

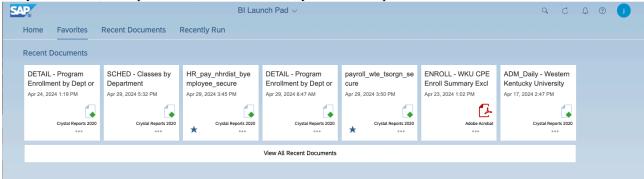


From your Favorites, you can easily schedule the report by right clicking or using the ... to schedule the report.

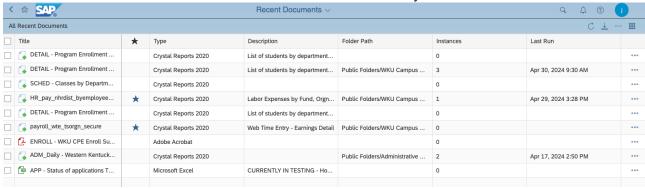


Recent Documents:

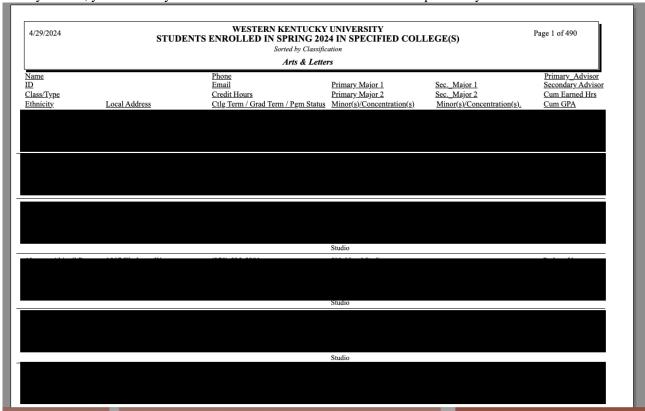
From the Home Screen, you can view your Recent Documents. This is a place that shows all report documents that you have ran, the report itself, and in the format, you ran that report.



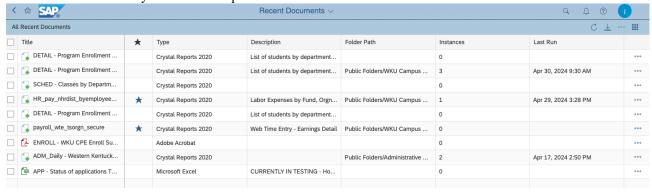
You will click on the View All Recent Documents to see the full list that you have ran.



From you here, you can easily click on the document title and review the report that you ran.

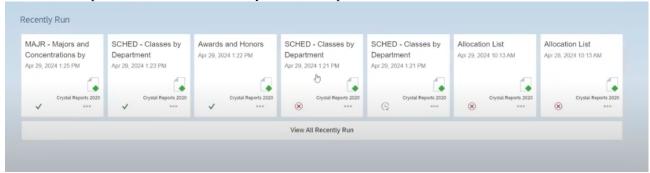


This location also allows you to select a report to Favorite.



Recently Run:

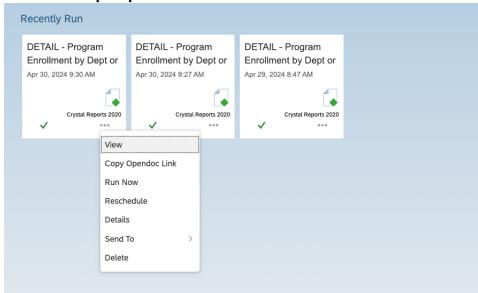
From the Home Screen, you can view your Recently Run reports. This is a place that shows all reports that you have ran, the report itself, and in the format, you ran that report.



You will click on the View All Recent Documents to see the full list that you have ran.



You can right click or use the ... to reschedule that report again or select run now. Please note, all prompts and formats will stay from the first time you ran that report. You will need to change that should you need to select different prompts or format.



Create a Recurring instance:

Select the report that you want to set as a recurring report. Right click or use the ... to Schedule from the list of options. The scheduling form will appear.

Schedule

General
Report Features

Instance Title

Title*

DETAIL - Program Errollment by Dept or College (dw)

Destinations

Delivery Destinations

Add

Recurrence

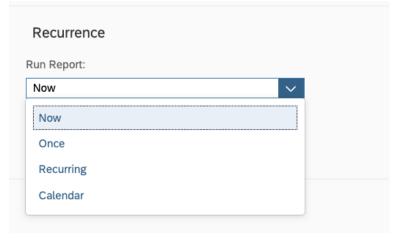
Run Report:

Now

Allow Retries

OFF

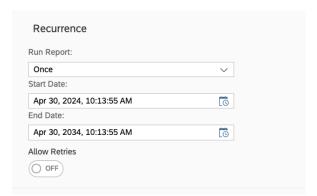
In General, you will select the Recurrence option that fits your need.



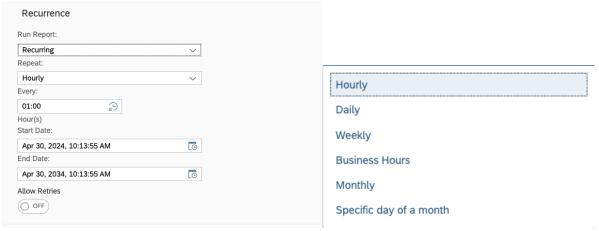
The default option is Now, which runs the report and directs to the History page where you can open the report.

You can run that report Now, Once, or Recurring. The Calendar option is not functional.

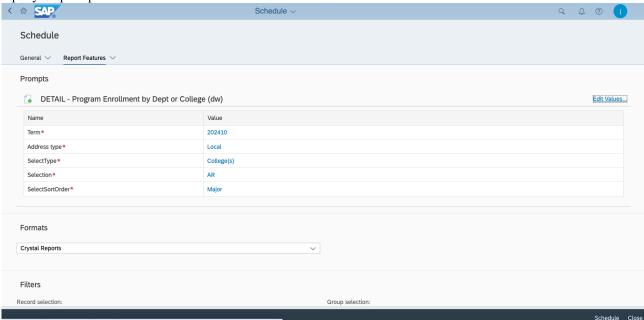
The Once option allows you to select the Start and End Date and Time with allowing retries on/off.



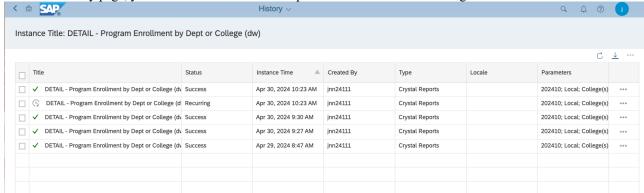
The Recurring allows you to select the Repeat time frame you wish for the report to recur, the Start and End Date and Time with allowing retries on/off



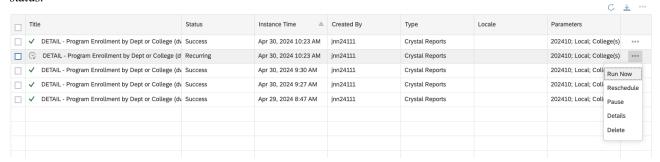
You will select your Recurrence time you wish to run the report and continue to the Report Features to input your prompts and format. Select Schedule.



From the History page, you will see the status of the report as a Success and Recurring.



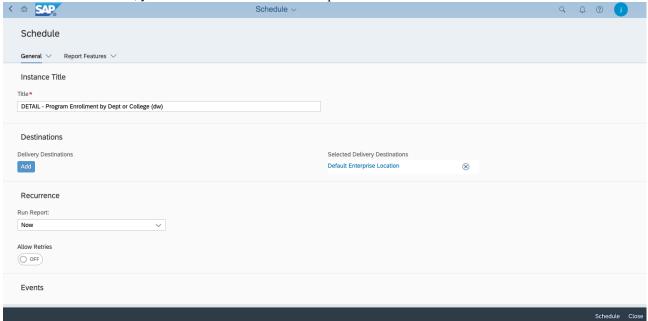
Should you need to delete a recurrence of the report, find that Recurring status and right click or use the ... to Delete that instance. Please note, you may still Run Now, Reschedule, Pause, or Delete that Recurring status.



Please note, only the user that ran the report can change the status of a report with deletion or pausing.

Destination Function

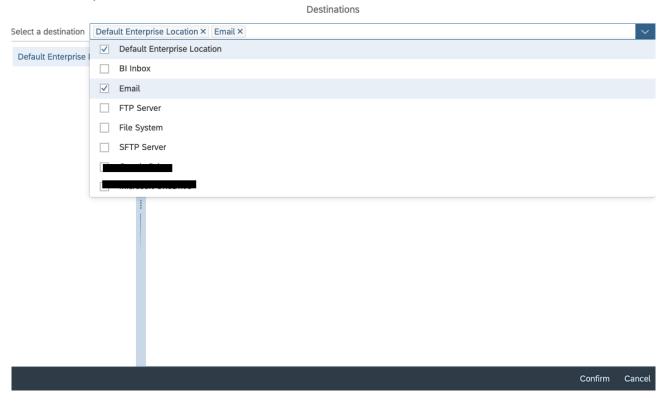
From the schedule menu, you can add Destinations for the report.



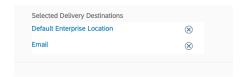
By clicking the Add under the Destinations, you can the Delivery Destinations. Multiple Destinations may be selected. The Default Destination is the Enterprise Location, which opens the report on your machine.

Destinations

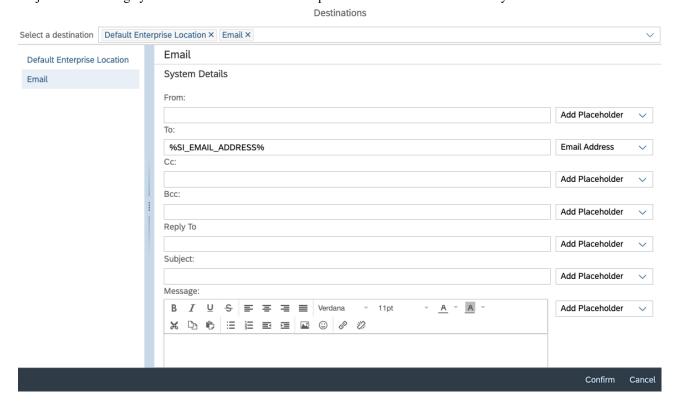
Email: If you select to have the Email added, you will have that report sent to the machine and emailed to the destination you select.



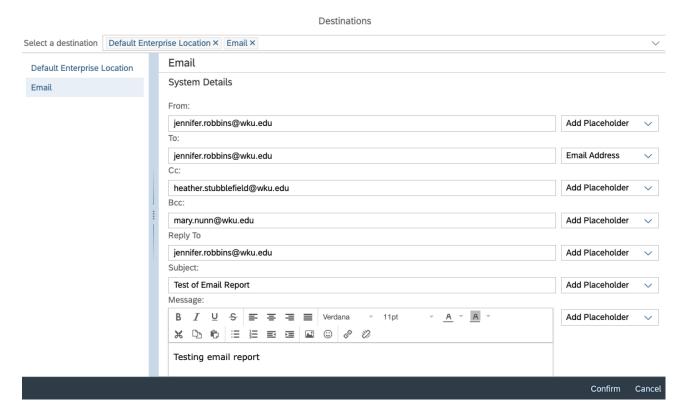
From the Selected Delivery Destinations menu, you will click on the Email to input the information necessary to schedule the report to be delivered by email.



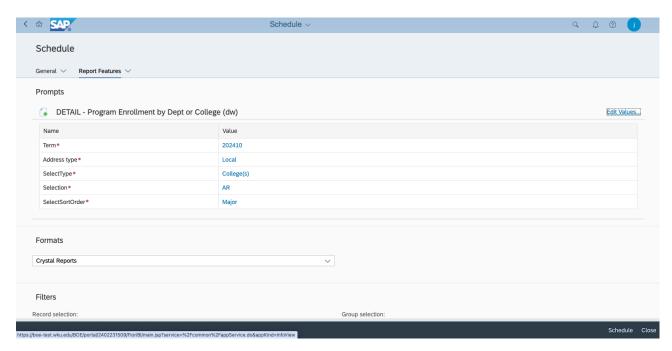
You will have to input the email address you wish the report to be delivered. You can cc, bcc, add a reply to address, a subject and a message you wish to be added when the report is scheduled for email delivery.



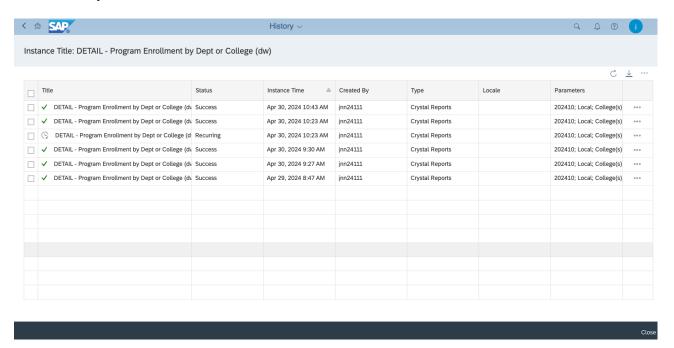
Once you have your information for the prompts, you will click confirm. Then go to Report Features to add the prompts and format needed for the report.



Schedule your report.

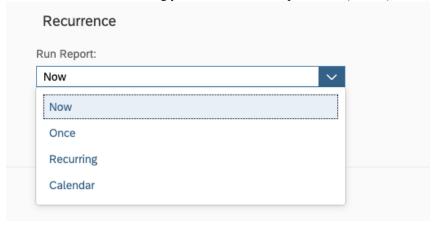


You will receive a Success message and you can view your report if you selected to have the report to the Enterprise Location when you selected Email.

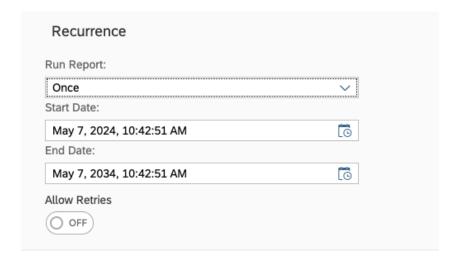


Scheduling a Recurrence

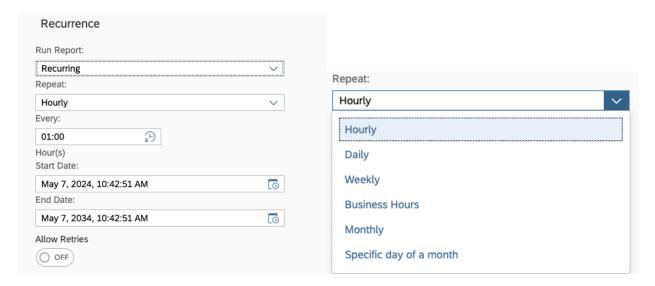
You will determine the timing you wish to run the report: Now (default), Once, Recurring, or by Calendar.



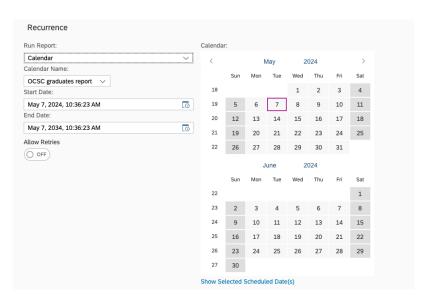
Once: You will select the date and time you wish for that report to run.



Recurring: You will select the repeat schedule you wish to have the report recurring and select the dates. Hourly is based on the time, Daily is based on the days you wish it to run, Weekly is based on the days in the week you wish to run, Business Hours is based on the start and end time you wish the report and at what hour, Monthly is based on the month you wish to have it run, and Specific Day of a Month is based on what day number you wish it to be run. Each recurrence allows you to enter a Start Date and Time and End Date and Time.



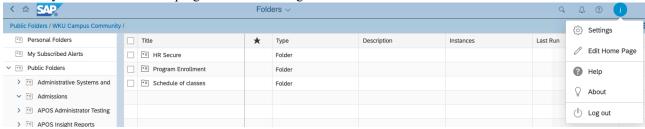
Calendar:



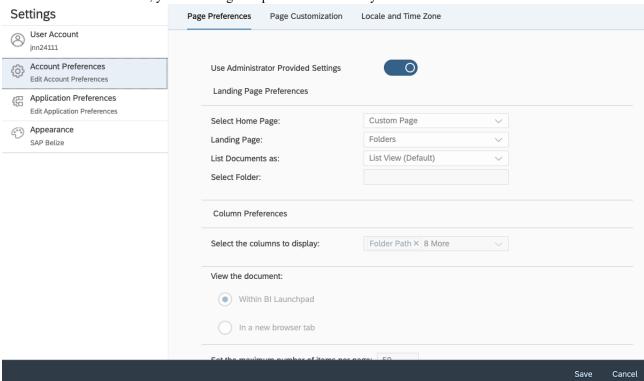
^{**}Please note, whatever destination you have set is where the report will go. Please see the previous section to set the destination should you want it to go another location other than in InfoView itself.

Changing your user preferences

Click on your user icon in the top right and click Settings.

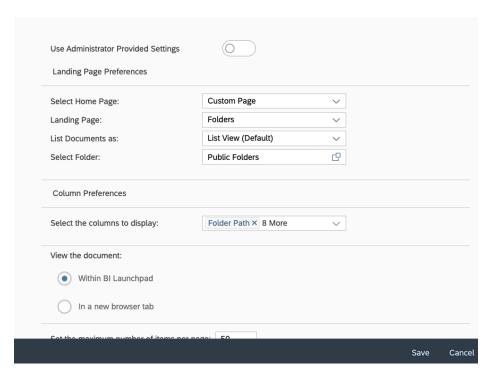


Under Account Preferences, you can change the perferences of the layout.

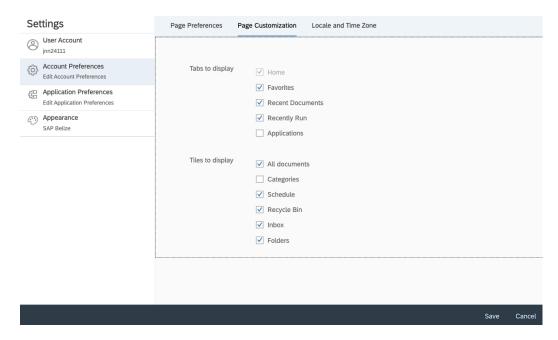


The Administrator Provided Settings is the settings that we have set up for InfoView to be used. By toggling that off, you can customize how you want your Home Page, Landing Page, Documents List and Folders to be laid out.

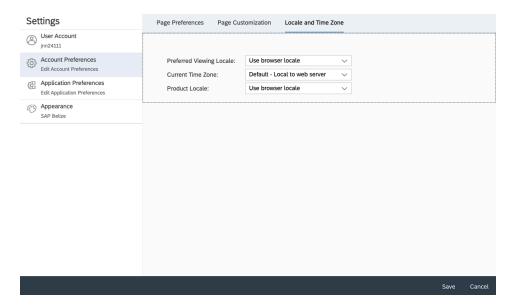
Example:



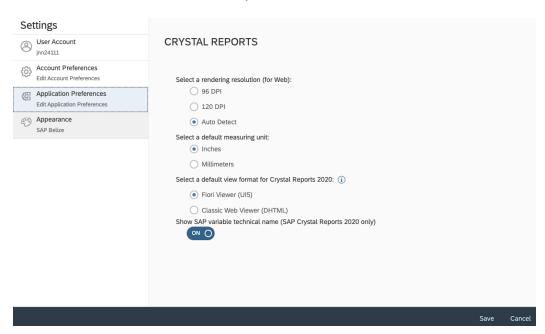
Page Customization allows you select what tabs you wish to have displayed.



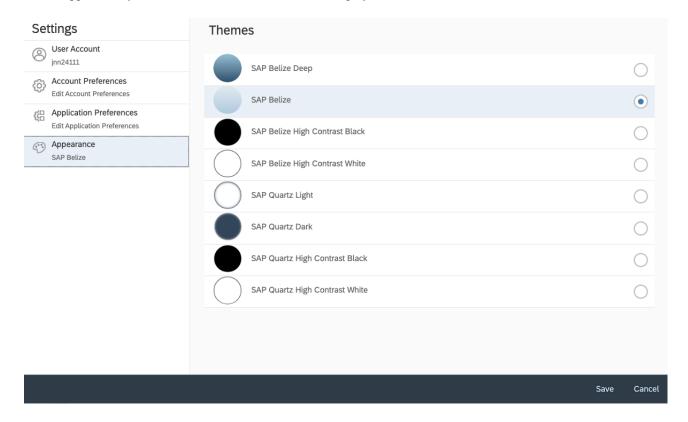
The Locale and Time Zone are best used by the default setting.



Under the Application Preferences you may change to customize based on your resolution, measuring unit and viewer. These are defaulted to the best function for your machine.



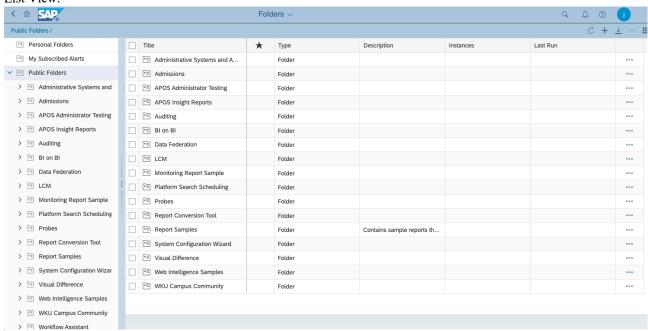
Under Appearance you can customize based on the color displayed.



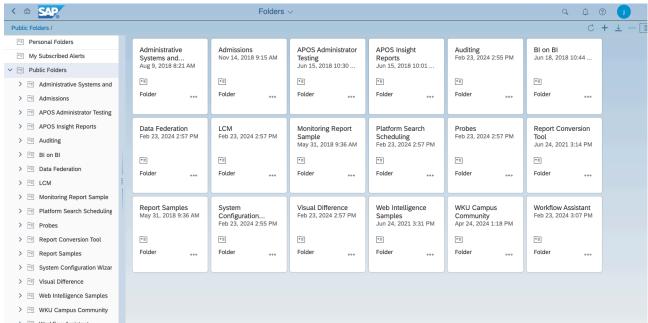
By clicking Save, you will change the layout to be customized to your preference.

From the Folders, you can change the layout from List to Grid by clicking the

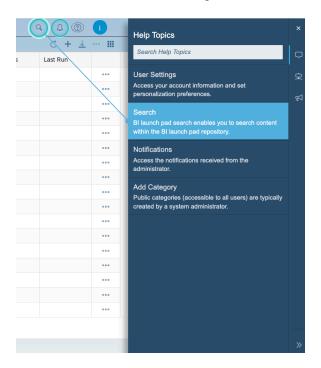
List View:



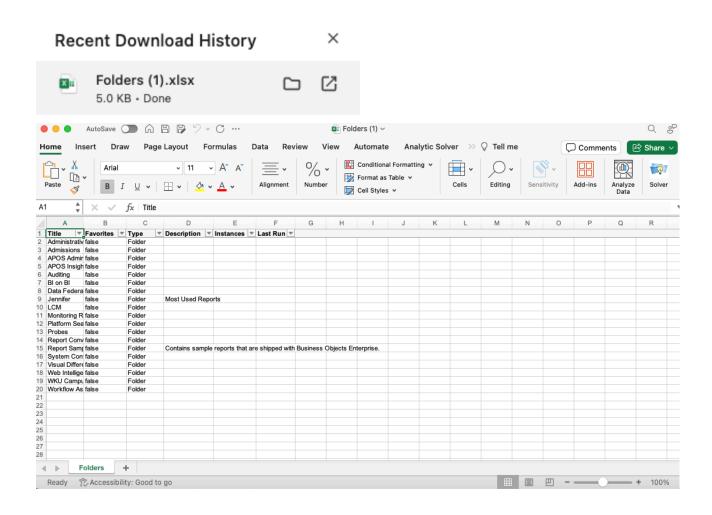
Grid View:



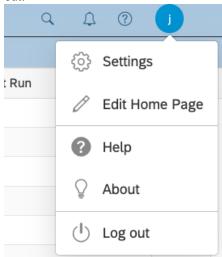
The in the top right allows you to access Help Topics and Search for topics that may aid you in functions within InfoView. Click the X to exit the topics.



The allows you to download an Excel of the folders:



Make sure to Log off your InfoView account by just selecting user icon in the top right and selecting Log out.



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

Helpful List of Codes:

College Codes: (STVCOLL in Banner)

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	
НН	Health and Human Services	
IS	University College	
LI	University Libraries	
MC	Exploratory Study *Do Not Use*	
sc	Science and Engineering	
XL	Extended Learning & Outreach	

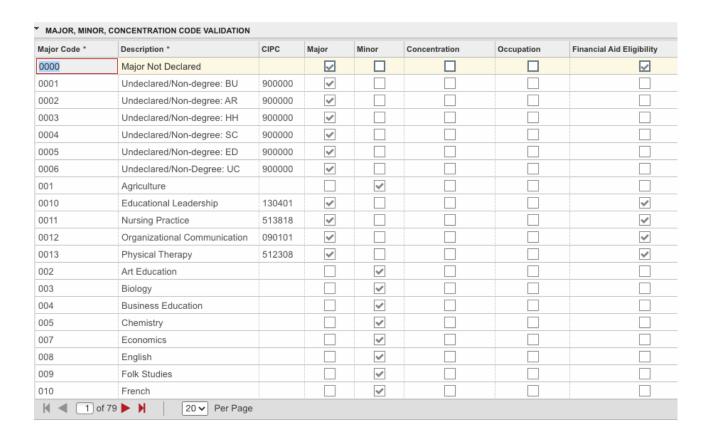
Department Codes: (STVDEPT in Banner)

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	

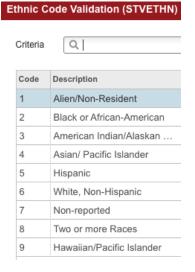
99BU	Coll BU:Interdiscpl/Undeclared
99ED	Coll ED:Interdiscp/Undeclared
99EX	Coll EX: Exploratory Studies
99HH	Coll HH:Interdiscp/Undeclared
99SC	Coll SC:Interdiscp/Undeclared
99IS	Coll UC: Deans Office
COMM	Communication
CD	Communication Sci & Disorders
CIT	Computer Information Tech
CS	Computer Science
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.



Ethnic Codes (STVETHN in Banner)



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)

Description	
He/Him/His	
She/Her/Hers	
They/Them/Theirs	
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