

4.3 - Getting Started with InfoView - Launchpad

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This is the “Home” screen in Launchpad. You’ll notice that it has these tiles, and the tiles are grouped into specific areas.

Let’s start by going over the tiles at the top:

Home

- Tiles & Toolbar
 - **Folders**- you would click on this to get to reports you had saved in your personal folders or in Shared public folders.
 - **Categories** - from here, you will be able to access authorized Corporate Reports
 - **BI Inbox** - Access to reports sent to you by other Report Developers.
 - **Instances** - scheduled reports
 - **Recycle Bin** - where you can retrieve a recently deleted report. This is specific to reports
- Favorites - Any report can be saved as a favorite & this will be demonstrated later in the video. Yours may be blank until you save your first favorite report.
- Recent Documents - These tiles are reports you have worked on recently
- Recently Run - reports you have scheduled
- Applications - From this tile, you can launch Web Intelligence - which is the application used for report development

Notice that from the menu at the top, we can quickly jump to any of these sections on the home page.

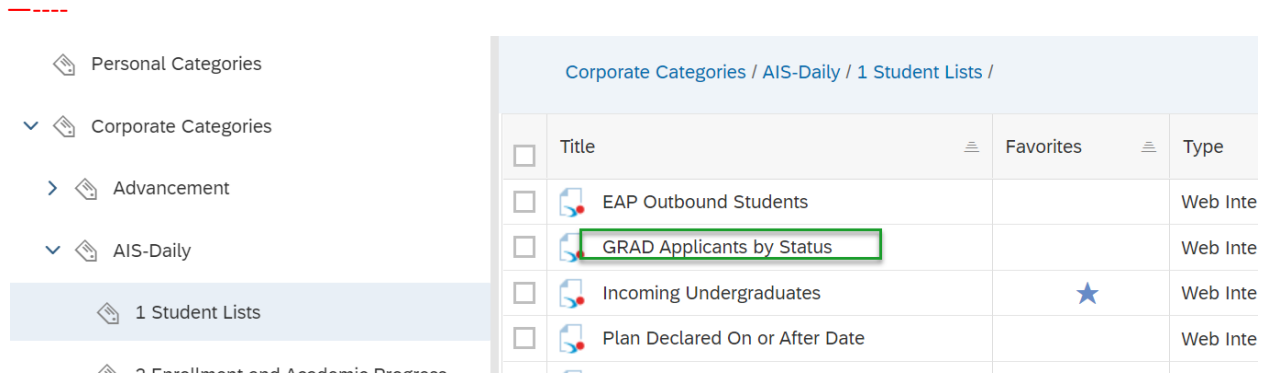
Let’s navigate to a list of corporate reports.

Corporate Reports

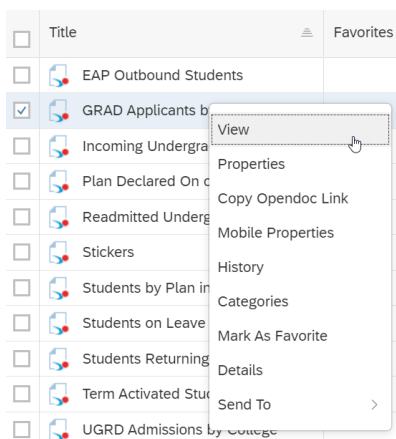
All Corporate Reports are accessible from the Categories tile.

Corporate Reports are designed, published and maintained by the Data Management team in partnership with Department Business Leads and Subject Matter Experts. This collaboration ensures the correct use of data, thereby ensuring data governance and quality control in the report development and the change management processes.

- Corporate Categories are named similar to the general access and unit specific universes. The reports available in each category are grouped (categorized) by the business data reported.
- Selecting or expanding a Corporate Category will display the corporate reports available
- Your security rights will dictate which Categories and reports you are able to see



To open a report, there are a couple of options. Right click on the report name and select “View” OR, just click on the report name. This will open the report in “Reading” mode.



Open “GRAD Applications by Status” report.

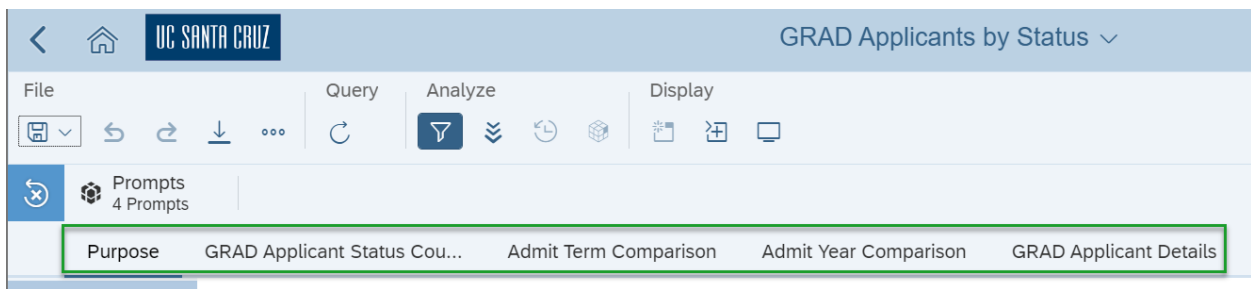
Navigating Reports

All Corporate reports have a Purpose tab containing pertinent information and a Certification logo.

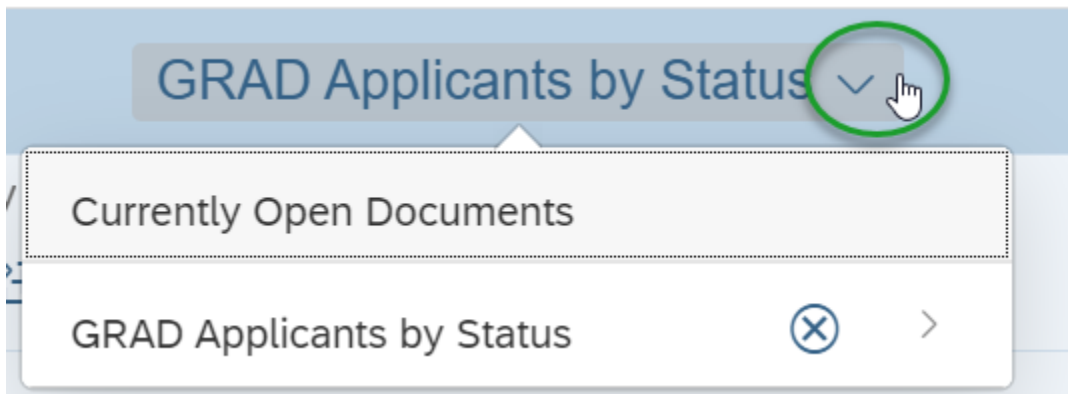


This report has passed the UCSC Data Warehouse's Report Certification Process (see <http://datamgmt.ucsc.edu/infoview/corporate-docs/index.html>). Any user customizations that change the dynamics, functionality or purpose of the report negate the certification status. In such event, please remove all marks of certification from each report tab.

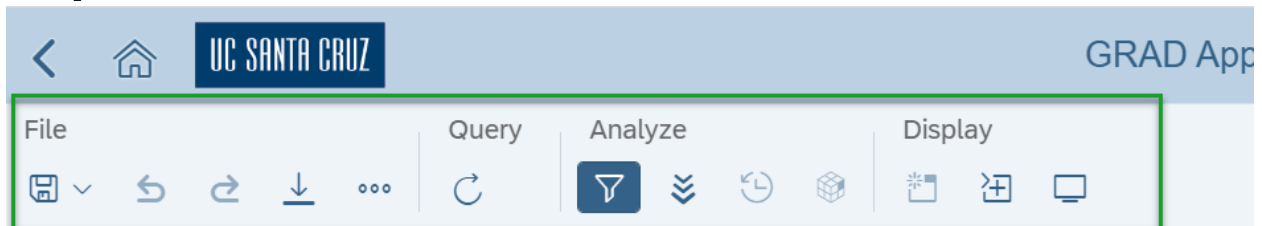
Shared Folder reports may or may not have a Purpose page, or department certification process.



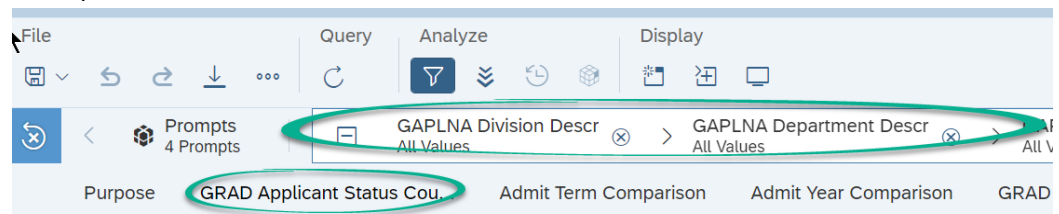
Multiple reports can be opened at once:



Report Menu Bar



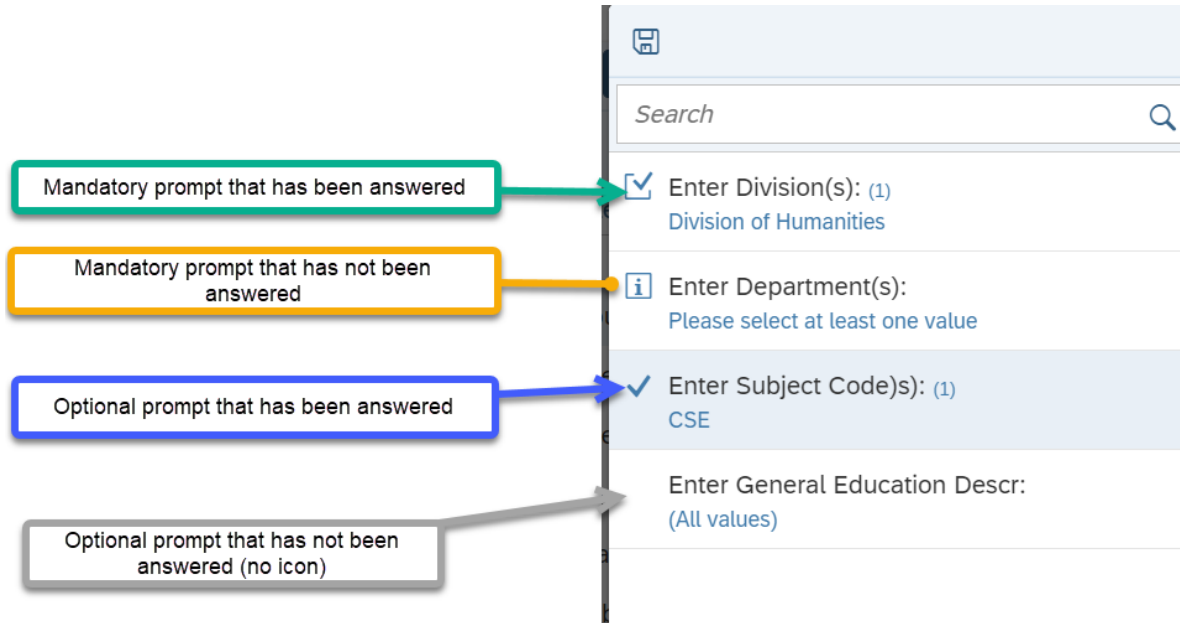
- File:
 - Save AS - Save a report as the same name or another report name to your MY FOLDER.
 - Undo / Redo - Undo the last action, redo the action
 - Export - Excel, PDF, HTML, TEXT & CSV
 - Print - Converts report to PDF format to Print., Send to BI Inbox
- Query
 - Refresh the report - to get the latest data. Data selection prompts with lists of values.
- Analyze
 - Filter bar - displays any Prompts, Report Filters or Input Control filters. Not all reports include report filters.
 - Report Filters: - go to GRAD Application Status Count tab: Report filters / Drill Filters are similar to Excel column filters.



- **GRAD Applicant Status Count**
- Display
 - Freeze Header row
 - Folding - not used much
 - Presentation mode - displays report without panels or menus

Refresh Reports

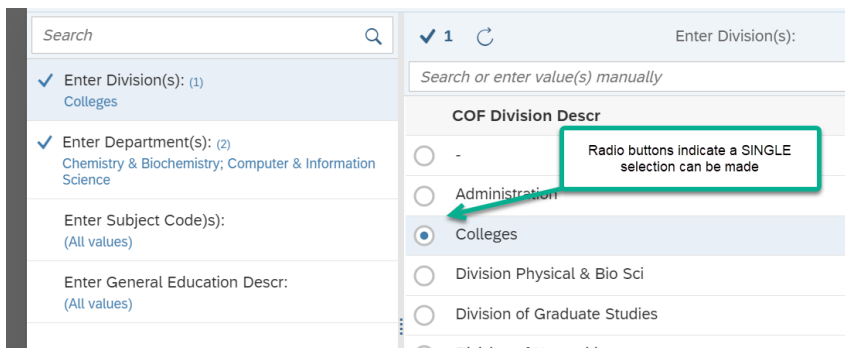
Mandatory vs Optional prompts



Inlist vs Equal:

Report Prompts can have a list of values defined to assist users in selecting the correct value. Prompts without a list of values require the value to be typed in the Type values here field. Typing a value requires you to type the exact value.

Prompt values can be a selection of one or more values.



Multiple selections can be made:

Prompts

Search

✓ 3 Enter Department(s):

Enter a value manually

Division of Humanities

COF Department Descr

American Studies

Critical Race & Ethnic Studies

Feminist Studies

History

History of Consciousness

Humanities Division

Lang & Applied Linguistics

Languages

Enter Division(s): (1)
Division of Humanities

Enter Department(s): (3)
History of Consciousness; Humanities Division;
American Studies

Enter Subject Code(s):
(All values)

Enter General Education Descr:
(All values)

Check boxes indicate that MULTIPLE selections can be made

Selecting Dates - using Calendar

<https://bo-dev-web.ucsc.edu/BOE/OpenDocument/opendoc/openDocument.jsp?sIDTtype=CUID&iDocID=AexIP7DlzhNOhZZD5IYMdNc>

Prompts

Search

Enter Trans Detail Begin Date

Enter a date manually

Selected value(s)

No selected value

Enter Trans Detail Begin Date
Please select at least one value

Enter Trans Detail Ending Date
Please select at least one value

September 2022

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1

Hours

10

11

12 00 00 AM

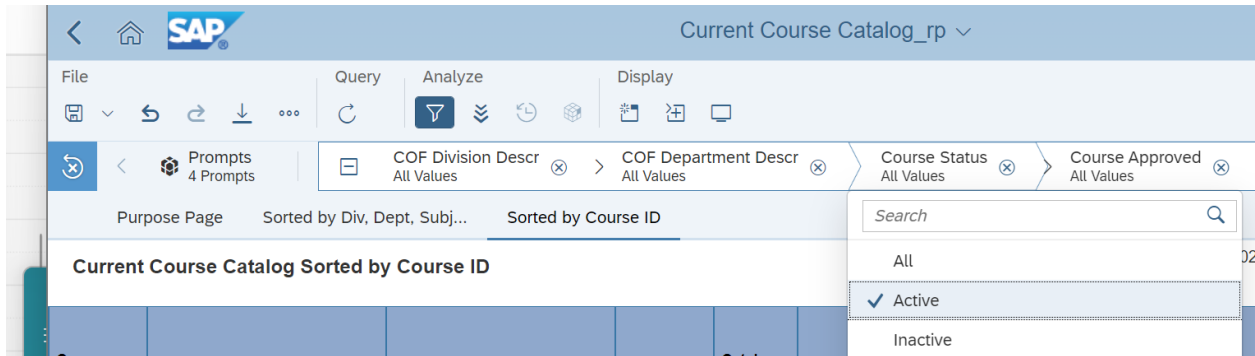
1

2

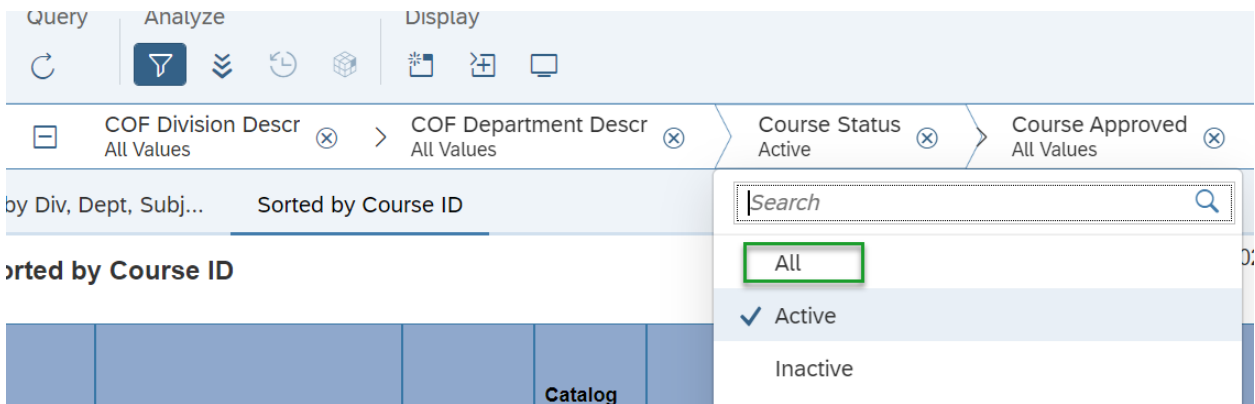
Report Filters and Input Controls

Using Filters

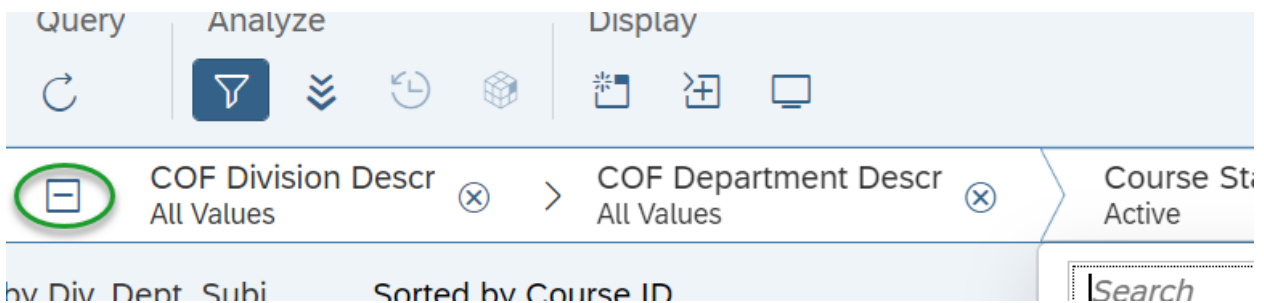
Report Filters provide easy navigation to specific selections of report data. Report filters are very similar to excel data filters and are unique to individual report tabs.



Resetting Filters



Collapse filters:



Saving Report Data

Corporate reports refreshed with data cannot be saved to the standard published Corporate report. The security model does not allow users to save data refreshes with prompt values to the original Corporate report.

Copies of Corporate reports with data and prompt values can be saved to a user's personal folder (**My Folders**).

My Folders

My Folders is a user's personal folder. Each InfoView /Launchpad user account is provided a personal folder, which is not shared with other users. The individual user and InfoView/Launchpad Administrator are the only users who can access reports saved to you "My Folder".

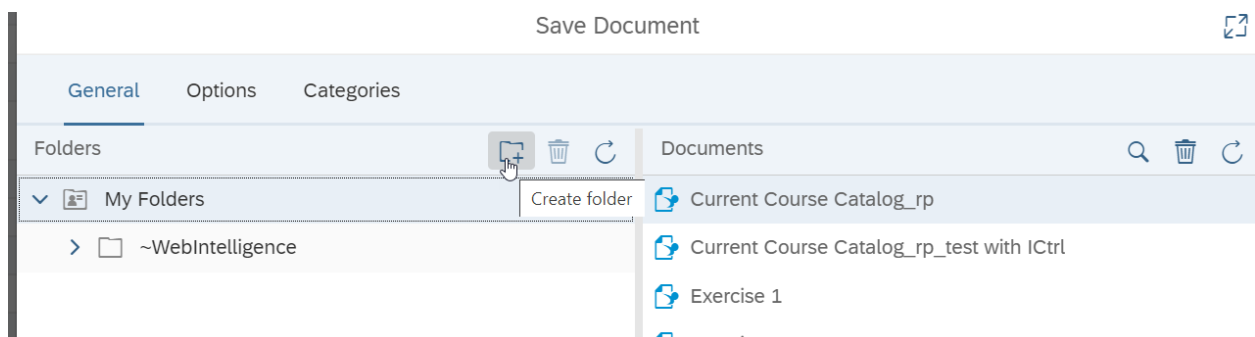
It's important to note that copies of Corporate and Shared Folder reports are not updated when the original published report is changed.

- The Data Management team in collaboration and communication with Corporate report business leads and subject matter experts release updates to Corporate reports periodically. Communication is distributed notifying users of the changed report. Each user is then responsible for creating a new copy into their personal folder and removing the outdated report.

Sub-folders within My Folders

Users can create and organize subfolders within their My Folder to store copies of Corporate and Shared Folder reports.

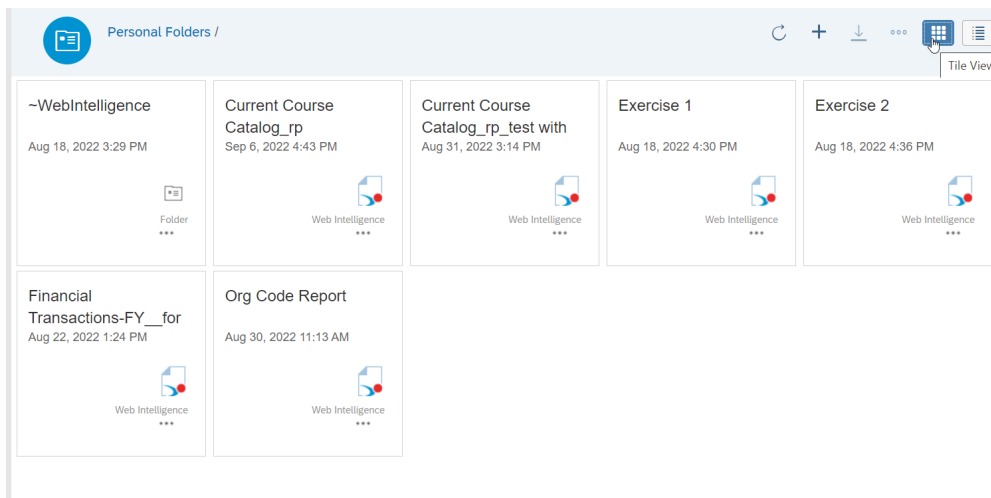
The "Create Folder" icon at the top will create a new folder or subfolder within your My Folder structure. This is a helpful way to organize copies of reports.



~WebIntelligence folder

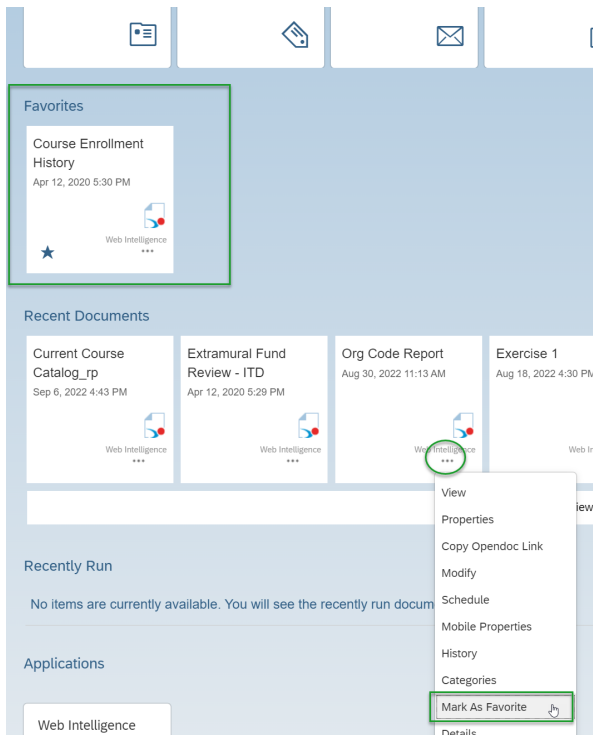
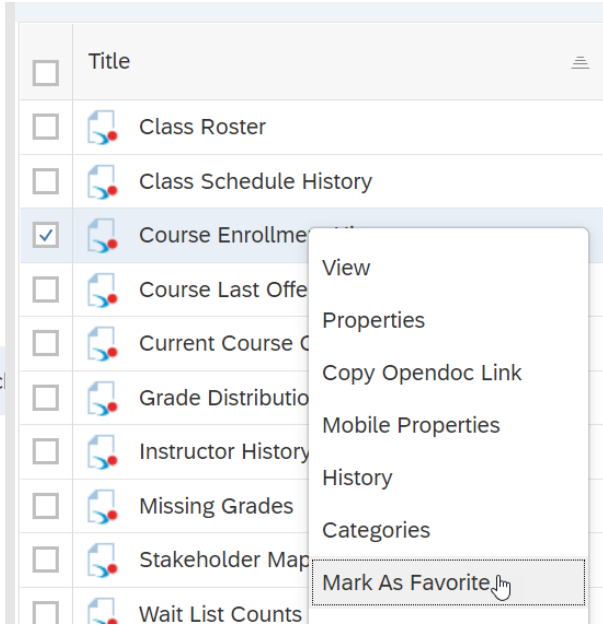
Within My Folder, everyone will have a “~WebIntelligence” folder. This is where reports are saved which have “timed-out”. As we are working in a browser environment, occasionally you will get a message that your report has timed out. If that happens, you should be able to recover that report that may have been in process from this folder.

View as Tiles or a List

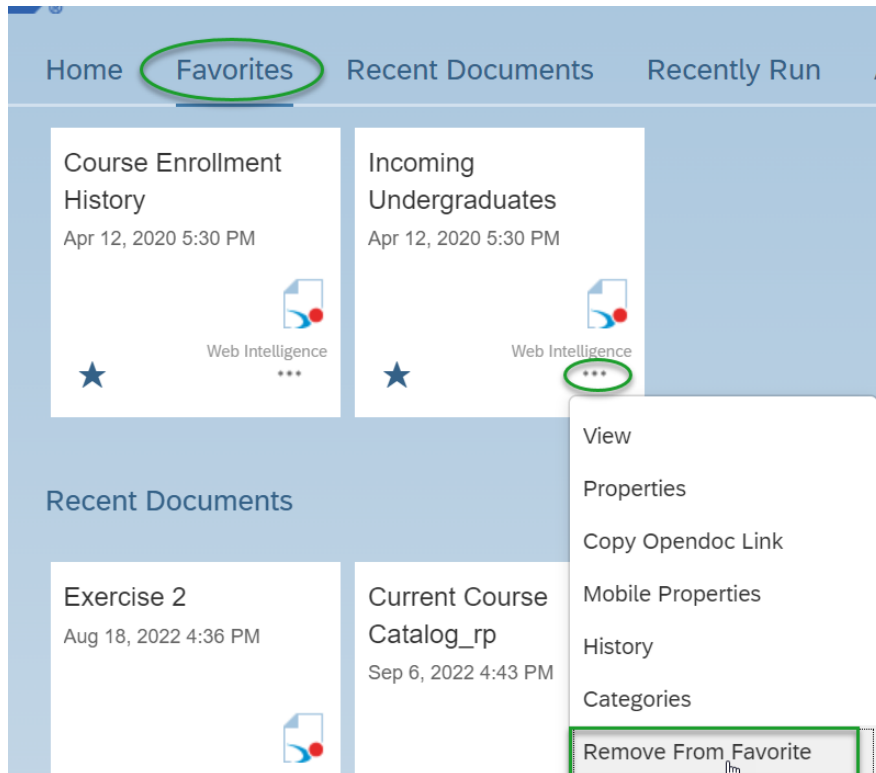


Favorites

You can also “Favorite” certain reports or even folders. From the list of reports in either Categories or your My Folder list, you can Right Click and select “Mark as Favorite”:



Access your “favorites” from the Home page / Favorites:

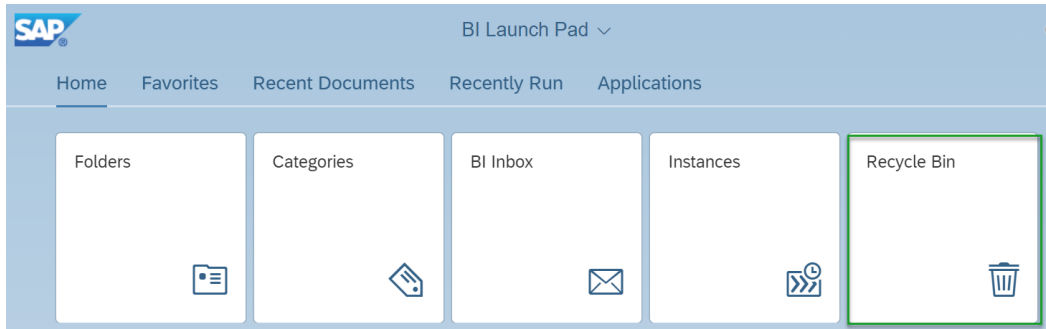


Delete a report

You can delete a report from My Folders by Right clicking and selecting Delete from the options. Deleting a folder or report from a personal folder removes the file and adds it to the user's recycle bin, where it could be retrieved if needed later.

Recycle Bin

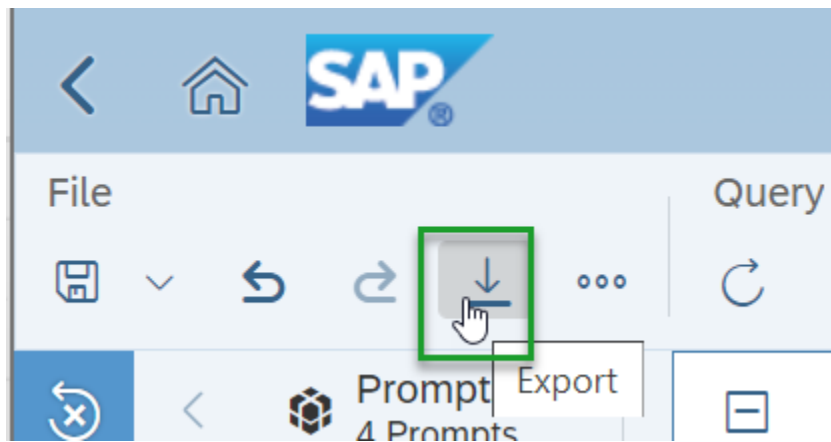
Users can access and retrieve deleted personal folders and reports from the Recycle Bin. The Recycle bin is accessible from the Home page:



Be aware that Launchpad administrators may have enabled Auto-Cleanup for Recycle Bins which cleans out everyone's recycle bin after 30 days or so.

Export Report Data

Export Options



Export to

Excel

Content Options

Reports Data

Search

All reports

Purpose Page

Sorted by Div, Dept, Subject

Sorted by Course ID (Current Report)

Report data can be exported to Excel, PDF, HTML, TEXT or CSV format and saved to a user's desktop or windows network shared folder. All data exports and dissemination from the secured Infoview /Launchpad application remains accountable to the security framework that protects UCSC's institutional information/data and Privacy practices for P1-P4 -PII, FERPA, ITAR, IRB data.

Be sure you have reviewed the [protocol for handling restricted data in email](#).

Public Folders - Shared Folders & Reports

- Shared Folder report changes are managed by each Department subject matter expert-report developer. Users are required to coordinate report copy updates with their department's report developer.