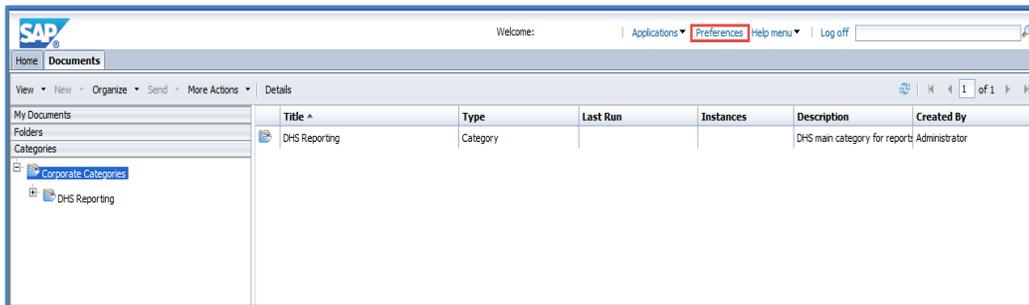


## ➤ Job Aid: Setting up Preferences for InfoView/Data Warehouse (DW)

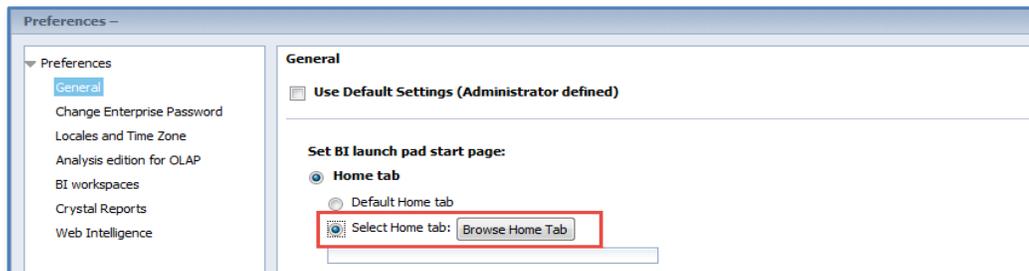
There are several data reports available to MiSACWIS users via the MiSACWIS **data warehouse portal**. Of those reports, the Book of Business (BOB) is available as a case management tool for first-line CPS and FC workers with a primary assignment role, as well as first-line FC and CPS supervisors.

MiSACWIS users can update InfoView Preferences to display the BOB each time they click on the **data warehouse portal**, therefore avoiding multiple steps to access the report. This job aid takes a user through the ten steps to update the Preferences.

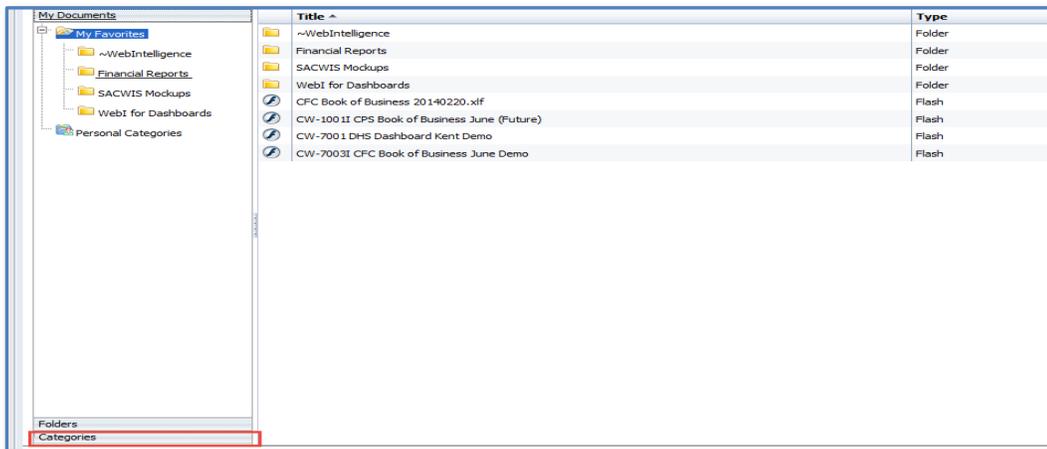
1. After logging into MiSACWIS, click on **data warehouse portal** link. In the toolbar in the InfoView window, click **Preferences**. The **Preferences** screen appears.



2. Under General, select **Select Home tab** and click **Browse Home Tab**. The **Custom Home tab** screen appears.

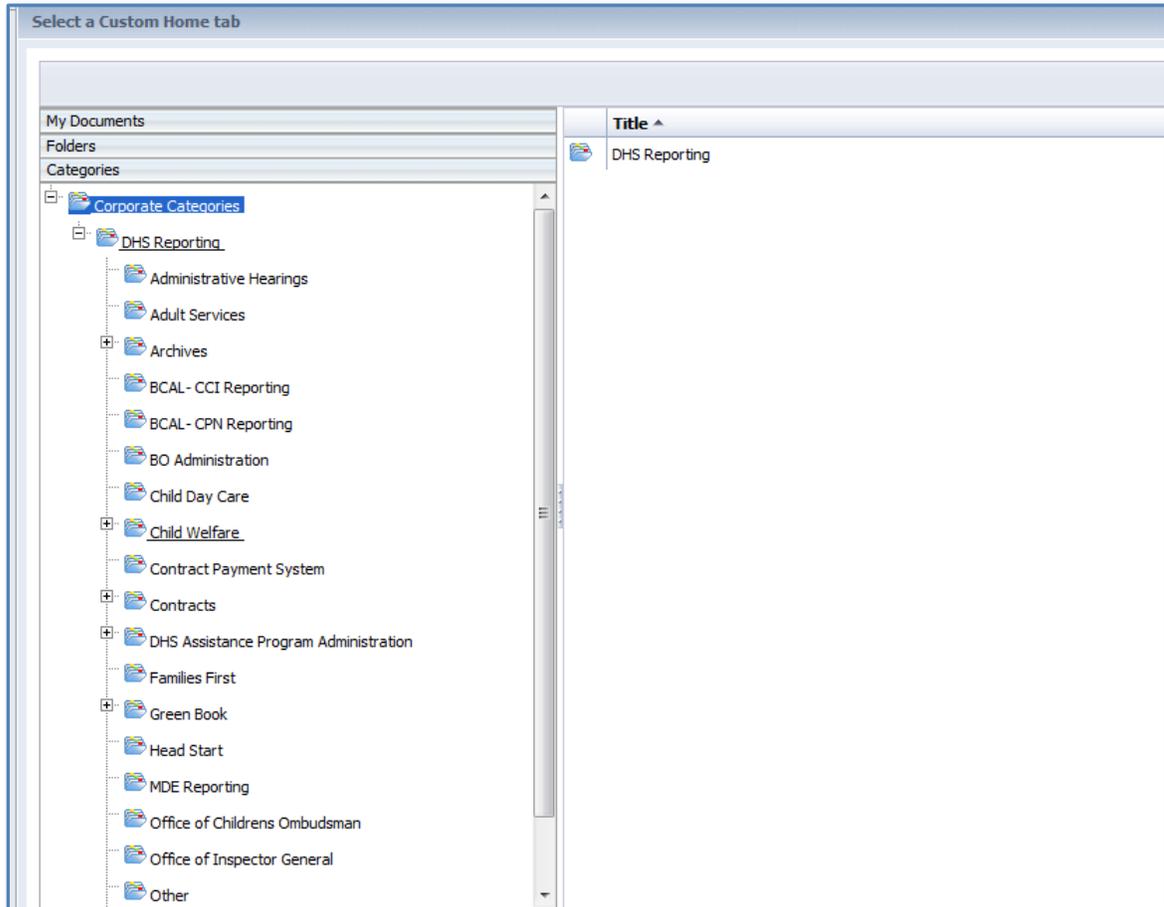


3. Click **Categories** in the bottom left-hand corner to select a document from Categories.



## > Job Aid: Setting up Preferences for InfoView/Data Warehouse (DW)

- Once Categories is selected it will show all the categories available to you based on your access level.



- Choose the Book of Business as described below.

### **Corporate Categories > DHS Reporting > Child Welfare > SACWIS**

For Workers:

- For CFC Book of Business (Internal Users):
  - Foster Care > CW-7003IW CFC Book of Business – Worker**
- For CFC Book of Business (External Users):
  - Foster Care > CW-7003EW CFC Book of Business - Worker**
- For CPS Book of Business:
  - Protective Services > CW-1001I CPS Book of Business**

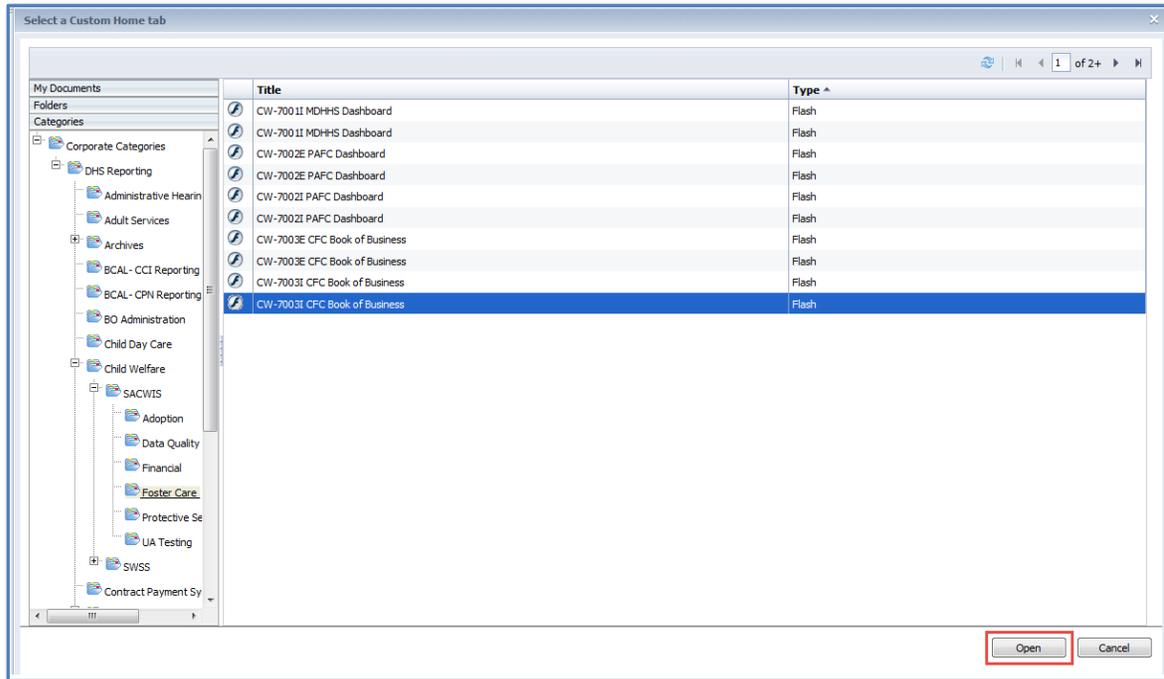
For Supervisors:

- For CFC Book of Business (Internal Users):
  - Foster Care > CW7003IS CFC Book of Business - Supervisor**

## > Job Aid: Setting up Preferences for InfoView/Data Warehouse (DW)

- b. For CFC Book of Business (External Users):
  - **Foster Care > CW-7003ES CFC Book of Business – Supervisor**
- c. For CPS Book of Business:
  - **Protective Services > CW-1001IS CPS Book of Business – Supervisor**

6. After selecting your document, Click **Open**.



## ➤ Job Aid: Setting up Preferences for InfoView/Data Warehouse (DW)

### 7. Click **Save & Close**.

Preferences – Nani Babu Anusuri

General

Use Default Settings (Administrator defined)

**Set BI launch pad start page:**

Home tab

Default Home tab

Select Home tab:

Documents tab

My Documents

My Favorites

Personal Categories

My Inbox

Folders

Public Folders

Select Public Folder:

Categories

Corporate Categories

Select Corporate Category:

**Choose Columns to Display on Documents Tab:**

Type

Last Run

Instances

Description

Created By

Created On

### 8. Click **OK** on the confirmation page.

Services Payroll Register

Dashboard

Alert by County - Summary

Notification Alerts by C

al and Dental Time

Documents

S Dashboard Data

board

shboard

board

Alerting is not enabled

See more...

**Preferences Changed**

Changes to some preferences will take effect after the page reloads.

## > Job Aid: Setting up Preferences for InfoView/Data Warehouse (DW)

9. Click the **Home** tab to open the document you selected.

The screenshot shows the SAP Fiori 'Home' tab interface. At the top left is the SAP logo. The user is logged in as 'Welcome: Nani Babu'. The 'Home' tab is selected and highlighted with a red box. Below the navigation bar, there is a yellow banner for the 'State Of Michigan Michigan Department Of Health and Human Services'. The main content area displays a report titled 'Report Date: CW-7003I CFC Book of Business'. Below the report title are several filter tabs: 'Child Profile', 'Medical Visits', 'Dental Visits', 'FC Service Plans', 'Worker-Child', and 'Worker'. At the bottom, a table header is visible with columns: 'Child Name', 'Case ID', 'Child ID', 'Gender', 'Birth Date', 'Current Age', and 'Current Service Type'.

10. Click the **Documents** tab to view any other documents.

The screenshot shows the SAP Fiori 'Documents' tab interface. The 'Documents' tab is selected and highlighted with a red box. The user is logged in as 'Welcome: Nani Babu'. The interface includes a navigation bar with 'Home' and 'Documents' tabs. Below the navigation bar, there is a menu with options: 'View', 'New', 'Organize', 'Send', 'More Actions', and 'Details'. The main content area displays a list of documents. On the left, there is a 'My Documents' sidebar with 'Folders' and 'Categories' sections. Under 'Categories', there are two categories: 'Corporate Categories' and 'DHS Reporting'. The main list shows a document with the title 'DHS Reporting' and the type 'Category'.