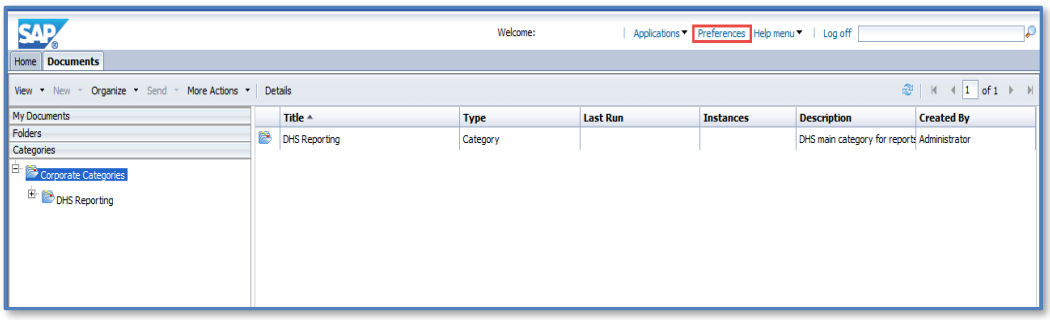
> Job Aid: Setting up Preferences for InfoView/Data Warehouse (DW)

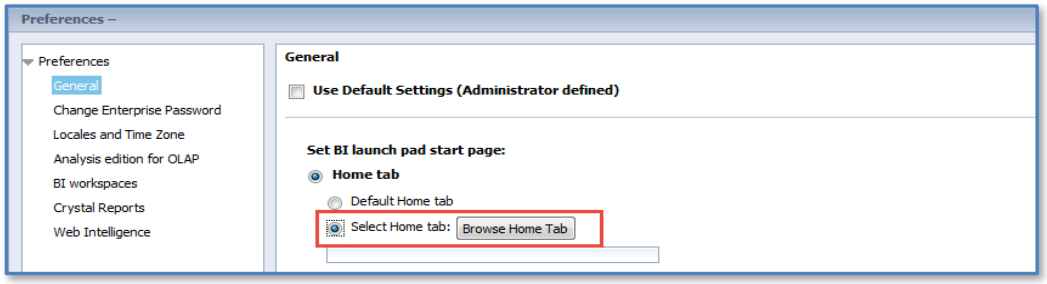
There are several data reports available to MiSACWIS users via the MiSACWIS **data warehouse portal**. Of those reports, the Book of Business (BOB) is available as a case management tool for first-line CPS and FC workers with a primary assignment role, as well as first-line FC and CPS supervisors.

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.

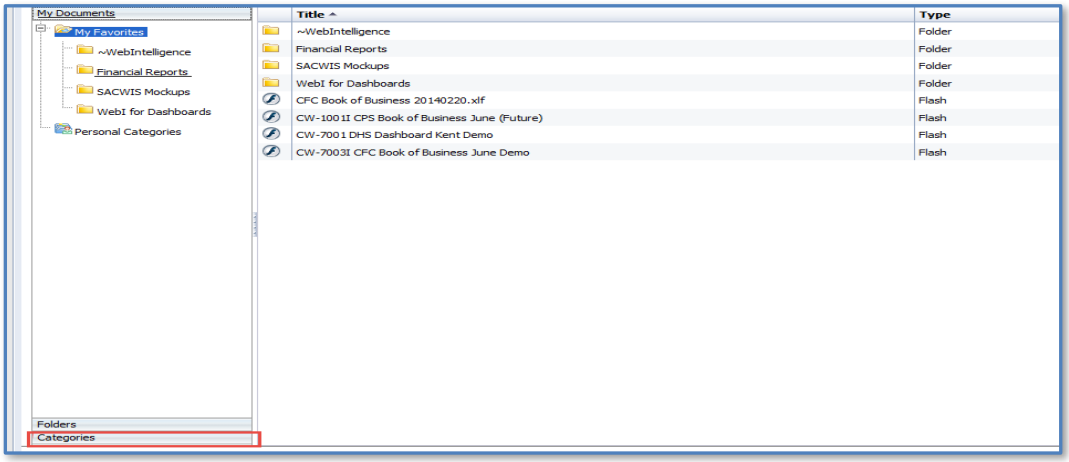
1. After logging into MiSACWIS, click on **data warehouse portal** link. In the toolbar in the InfoView window, click **Preferences**. The **Preferences** screen appears.



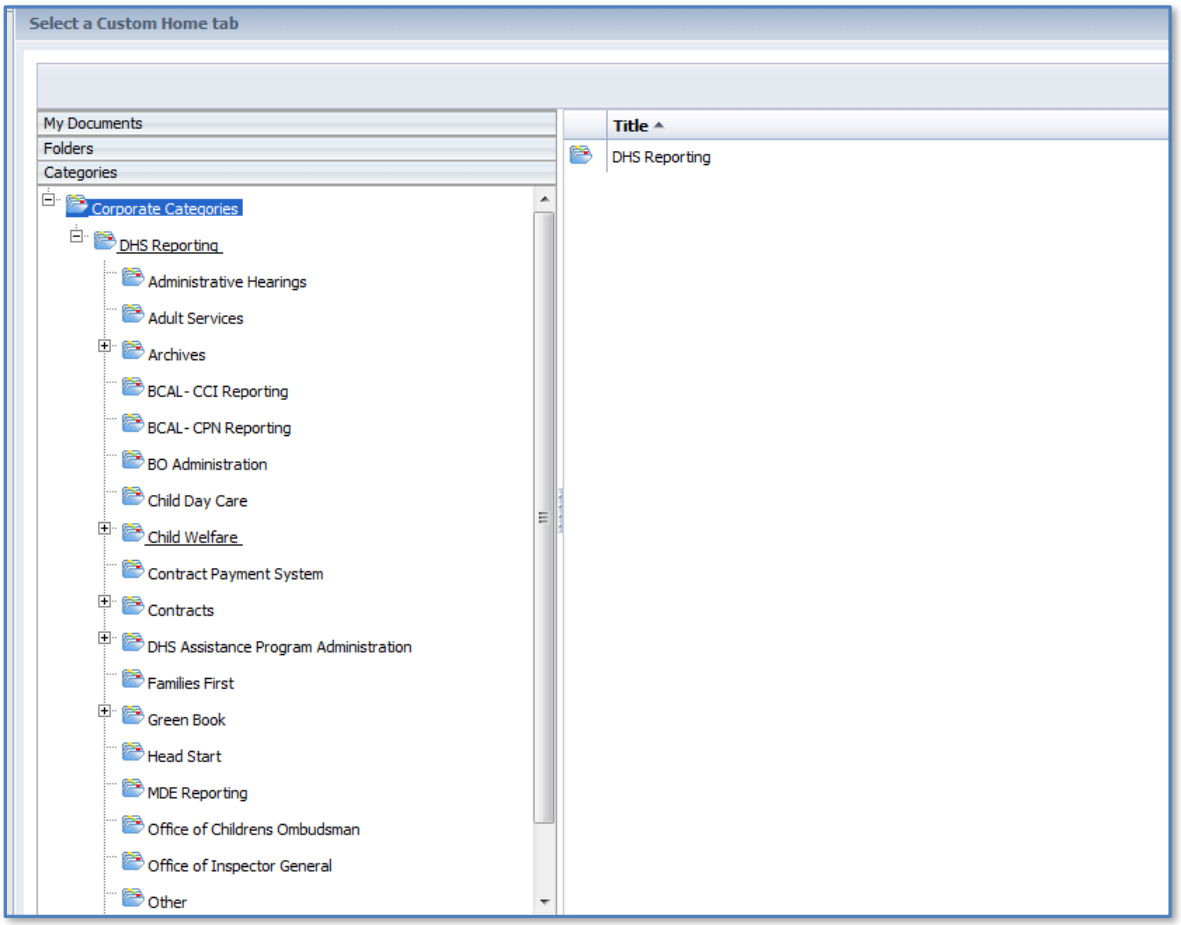
2. Under General, select **Select Home tab** and click **Browse Home Tab**. The **Custom Home tab** screen appears.



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



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



5. Choose the Book of Business as described below.

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

   For Workers:

   i. For CFC Book of Business (Internal Users):
      - **Foster Care** > **CW-7003IW CFC Book of Business – Worker**

   ii. For CFC Book of Business (External Users):
      - **Foster Care** > **CW-7003EW CFC Book of Business - Worker**

   iii. For CPS Book of Business:
      1. **Protective Services** > **CW-1001I CPS Book of Business**

   For Supervisors:

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

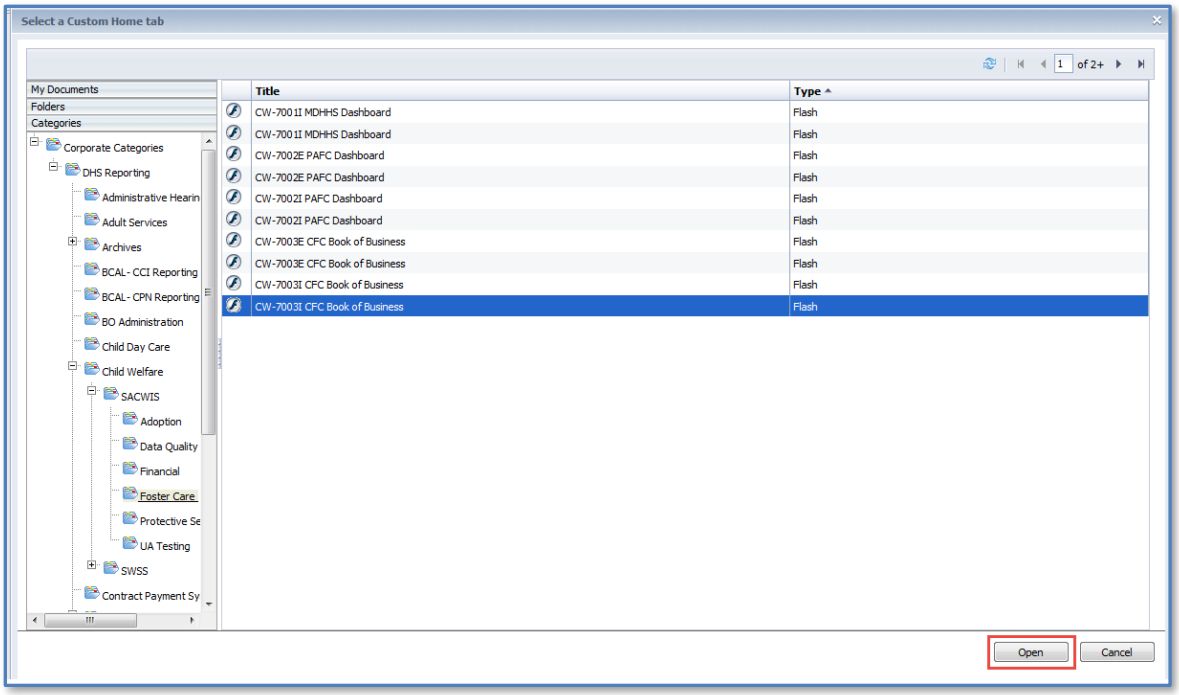
b. For CFC Book of Business (External Users):

- **Foster Care** > **CW-7003ES CFC Book of Business – Supervisor**

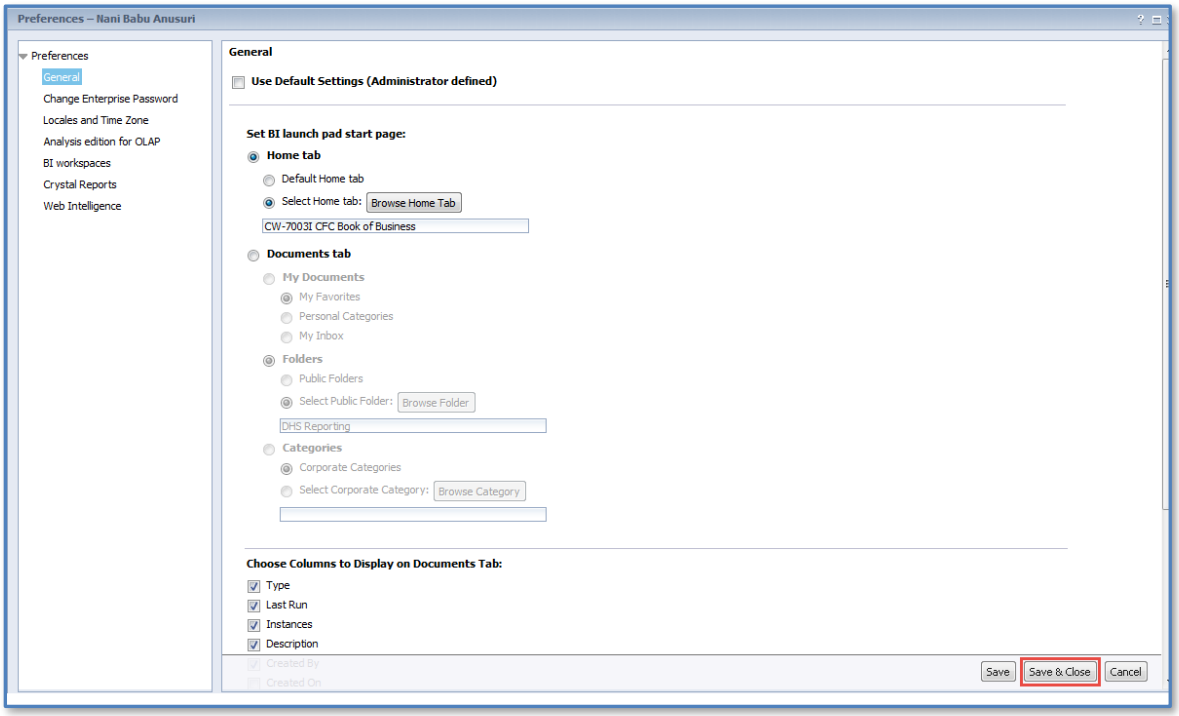
c. For CPS Book of Business:

- **Protective Services > CW-1001IS CPS Book of Business – Supervisor**

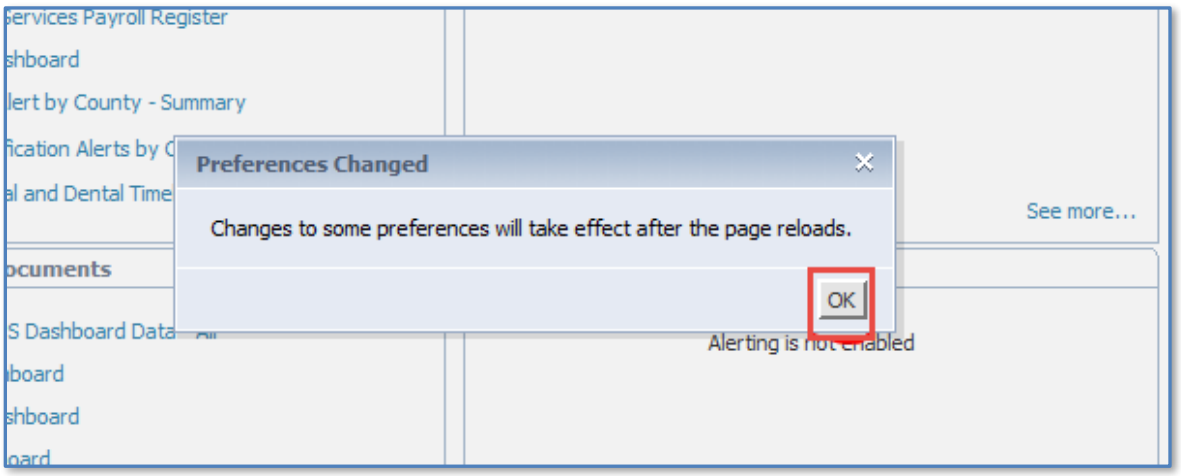
6. After selecting your document, Click **Open**.



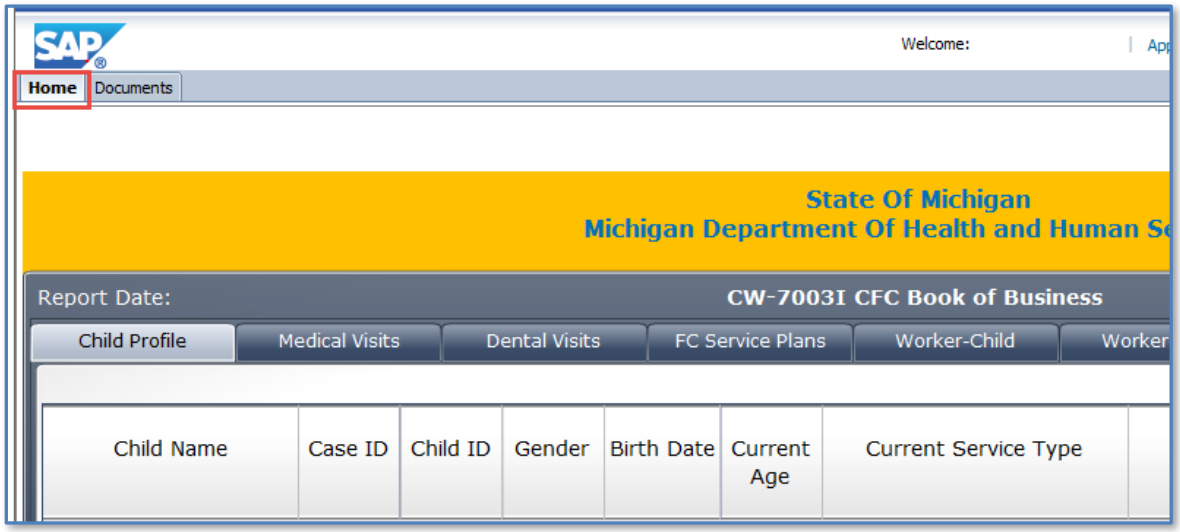
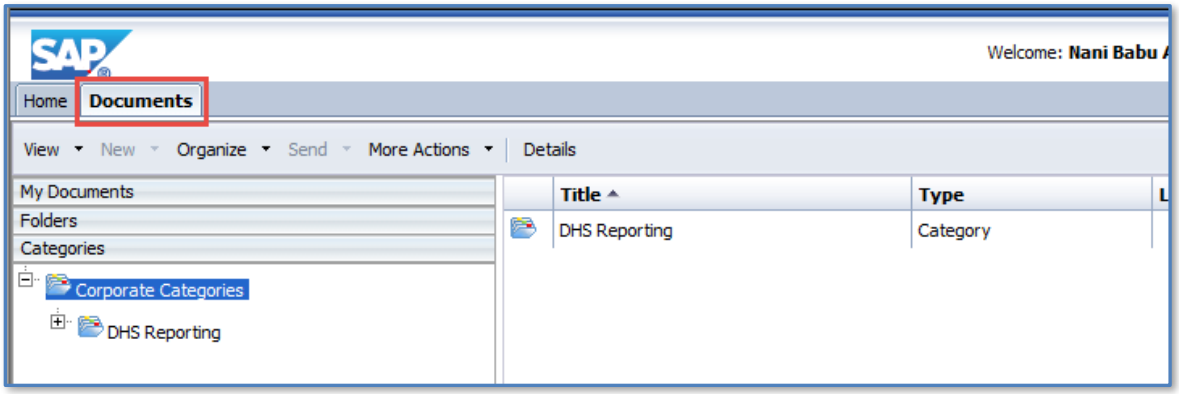
7. Click **Save & Close**.



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



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



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