Informer5 Training
Advanced Usage
Ad Hoc and Datasets Queries have similar structures. They both:
- Run against a Datasource.
- Have Field and Criteria definitions.
- Can have defined Flow Steps.

Ad Hoc queries differ from Datasets in that:
- Users can convert Ad Hoc Queries into Dataset Queries.
- Ad Hoc Queries results have a short lifespan.
- Ad Hoc Queries results are only available to the User who ran the Query.
- Ad Hoc Queries results cannot have any Visuals saved from them.
- Ad Hoc Queries are a type of Report, while Datasets are their own category of content.

One dataset to create reports separately
Creating a Dataset or Ad Hoc query (Report)

Ad hoc Query
Design a Query by choosing rows and columns from a Datasource

Name *
Training

Select Datasource *
Colleague Production

Select Mapping *
COURSE.SECTIONS

CANCEL  SAVE
Creating a Dataset or Ad Hoc query (Report)
Creating a Dataset or Ad Hoc query (Report)

### Mappings
- COURSE.SECTIONS
  - COURSES
  - COURSE_SEC.FACULTY
  - COURSE_SEC_MEETING
  - PERSON, faculty
  - PERSON (FIRST Faculty)
  - STUDENT.COURSE_SEC

### Sample Data
<table>
<thead>
<tr>
<th>Type</th>
<th>Name</th>
<th>Field</th>
<th>#</th>
<th>MV</th>
<th>Dict</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Acad Level</td>
<td>SEC.ACAD.LEVEL</td>
<td>30</td>
<td>D</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Acctg Method</td>
<td>SEC.FUNDING.ACCCTG.MET</td>
<td>110</td>
<td>D</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Active Students</td>
<td>SEC.ACTIVE.STUDENTS</td>
<td>66</td>
<td>M</td>
<td>D</td>
</tr>
<tr>
<td></td>
<td>Active Students (Count)</td>
<td>X.SEC.ACTIVE.STUDENT.COUNT</td>
<td>0</td>
<td>I</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Actual Expense</td>
<td>SEC.ACTUAL.EXPENSES</td>
<td>53</td>
<td>M</td>
<td>D</td>
</tr>
<tr>
<td></td>
<td>Actual Meetings</td>
<td>SEC.CALENDAR.SCHEDULE</td>
<td>96</td>
<td>M</td>
<td>D</td>
</tr>
<tr>
<td></td>
<td>Added By</td>
<td>COURSE.SECTIONS.ADDOF</td>
<td>22</td>
<td>D</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Added On</td>
<td>COURSE.SECTIONS.ADDON</td>
<td>23</td>
<td>D</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Add End Date</td>
<td>SEC.OVR.ADD.END.DATE</td>
<td>84</td>
<td>D</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Add Start Date</td>
<td>SEC.OVR.ADD.START.DATE</td>
<td>83</td>
<td>D</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Allow Audit</td>
<td>SEC.LALLOW_AUDIT_FLAG</td>
<td>39</td>
<td>D</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Allow Pass/No Pass</td>
<td>SEC.LALLOW.PASS.NOPASS</td>
<td>38</td>
<td>D</td>
<td></td>
</tr>
</tbody>
</table>
### Course Description:

**COMRT 590**
- **Course Description:** An independent study or research experience. The student independently pursues a topic or project of interest with guidance from a faculty member. Students meet one-on-one with the faculty mentor on a regular basis and also complete independent readings, laboratory work, or comparable activities. Credit: One to four semester credit hours.
- **Prerequisite:** Permission of the instructor.
- **Distribution Requirements:** None.

**ENGL 590**
- **Course Description:** An independent study or research experience. The student independently pursues a topic or project of interest with guidance from a faculty member. Students meet one-on-one with the faculty mentor on a regular basis and also complete independent readings, laboratory work, or comparable activities. May be repeated for credit.
- **Prerequisite:** Permission of instructor.
- **Distribution Requirements:** None.

**S27**
- **Course Description:** Individual instruction for students at the advanced level. A minimum level of repertoire difficulty is required as is attendance at weekly performance seminars. Specific details on the repertoire requirements for each instrument are on file in the Music Department Office.
- **Expectations of daily practice and improvement will be established by each applied instructor.**
- **One semester hour:** weekly half-hour lessons; two semester hours: weekly one-hour lessons. Students should expect to spend twice as much time in preparation for one-hour lessons as they would for half-hour lessons. Normal progress in repertoire and technique is expected in subsequent registration at this level. An additional fee is required for this course.

### Sample of 50 records

<table>
<thead>
<tr>
<th>Course</th>
<th>Course Description</th>
<th>Course Number</th>
<th>COURSE SECTION</th>
<th>COURSE_SEC_MEETING_POINT</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMRT_590</td>
<td>An independent study or research experience. The student independently pursues a topic or project of interest with guidance from a faculty member. Students meet one-on-one with the faculty mentor on a regular basis and also complete independent readings, laboratory work, or comparable activities. Credit: One to four semester credit hours. Prerequisite: Permission of the instructor. Distribution Requirements: None.</td>
<td>590</td>
<td>29082</td>
<td>TBA</td>
</tr>
<tr>
<td>ENGL_590</td>
<td>An independent study or research experience. The student independently pursues a topic or project of interest with guidance from a faculty member. Students meet one-on-one with the faculty mentor on a regular basis and also complete independent readings, laboratory work, or comparable activities. May be repeated for credit. Prerequisite: Permission of instructor. Distribution Requirements: None.</td>
<td>590</td>
<td>26999</td>
<td>TBA</td>
</tr>
<tr>
<td>S27</td>
<td>Individual instruction for students at the advanced level. A minimum level of repertoire difficulty is required as is attendance at weekly performance seminars. Specific details on the repertoire requirements for each instrument are on file in the Music Department Office. Expectations of daily practice and improvement will be established by each applied instructor. One semester hour: weekly half-hour lessons; two semester hours: weekly one-hour lessons. Students should expect to spend twice as much time in preparation for one-hour lessons as they would for half-hour lessons. Normal progress in repertoire and technique is expected in subsequent registration at this level. An additional fee is required for this course.</td>
<td>344</td>
<td>24916</td>
<td>TBA</td>
</tr>
</tbody>
</table>
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<table>
<thead>
<tr>
<th>Course</th>
<th>Course Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMRT_590</td>
<td>An independent study or research experience. The student independently pursues a topic or project of interest with guidance from a faculty member. Students meet one-on-one with the faculty mentor on a regular basis and also complete independent readings, laboratory work, or comparable activities. Credit: One to four semester credit hours. Prerequisite: Permission of the instructor. Distribution Requirements: None.</td>
</tr>
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</tr>
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</tr>
</tbody>
</table>

Sample of 50 records
Creating a Dataset or Ad Hoc query (Report)
Creating a Dataset or Ad Hoc query (Report)

Refresh
Sample Data
Run Live data
Creating a Dataset or Ad Hoc query (Report)

Add Criteria

- Match all (AND)
- Match Any (OR)
- None of All (NOT AND)
- None of Any (NOT OR)
Creating a Dataset or Ad Hoc query (Report)

Add Criteria
Creating a Dataset or Ad Hoc query (Report)

Add Criteria

Match all of the following criteria

Field: SELECT FIELD

Search Fields

<table>
<thead>
<tr>
<th>Type</th>
<th>Name</th>
<th>Field</th>
<th>#</th>
<th>MV</th>
<th>Data</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Acct Level</td>
<td>SEC.ACAD.LEVEL</td>
<td>30</td>
<td>D</td>
<td>Q</td>
<td>SELECT</td>
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<tr>
<td></td>
<td>Actgrp Method</td>
<td>SEC.FUNDS.ACCT.METH</td>
<td>110</td>
<td>D</td>
<td>Q</td>
<td>SELECT</td>
</tr>
<tr>
<td></td>
<td>Active Students</td>
<td>SEC.ACTIVE.STUDENTS</td>
<td>66</td>
<td>N</td>
<td>D</td>
<td>Q</td>
</tr>
<tr>
<td></td>
<td>Active Students (Count)</td>
<td>X.SEC.ACTIVE.STUDENT.COUNT</td>
<td>0</td>
<td>I</td>
<td>Q</td>
<td>SELECT</td>
</tr>
<tr>
<td></td>
<td>Actual Expense</td>
<td>SEC.ACTUAL.EXPENSES</td>
<td>53</td>
<td>M</td>
<td>D</td>
<td>Q</td>
</tr>
<tr>
<td></td>
<td>Actual Meetings</td>
<td>SEC.CALENDAR.SCHEDULES</td>
<td>06</td>
<td>M</td>
<td>D</td>
<td>Q</td>
</tr>
<tr>
<td></td>
<td>Added By</td>
<td>COURSE.SECTIONS.ADDOPR</td>
<td>22</td>
<td>D</td>
<td>Q</td>
<td>SELECT</td>
</tr>
<tr>
<td></td>
<td>Added On</td>
<td>COURSE.SECTIONS.ADD_DATE</td>
<td>23</td>
<td>D</td>
<td>Q</td>
<td>SELECT</td>
</tr>
<tr>
<td></td>
<td>Add End Date</td>
<td>SEC.OVR.ADD.END.DATE</td>
<td>64</td>
<td>D</td>
<td>Q</td>
<td>SELECT</td>
</tr>
<tr>
<td></td>
<td>Add Start Date</td>
<td>SEC.OVR.ADD.START.DATE</td>
<td>69</td>
<td>D</td>
<td>Q</td>
<td>SELECT</td>
</tr>
<tr>
<td></td>
<td>Allow Audit</td>
<td>SEC.AUDIT.FLAG</td>
<td>39</td>
<td>D</td>
<td>Q</td>
<td>SELECT</td>
</tr>
<tr>
<td></td>
<td>Allow Pass/No Pass</td>
<td>SEC.AUDIT.PASS.NOPASS.FLAG</td>
<td>38</td>
<td>D</td>
<td>Q</td>
<td>SELECT</td>
</tr>
</tbody>
</table>
Creating a Dataset or Ad Hoc query (Report)

Add Criteria
Creating a Dataset or Ad Hoc query (Report)

Add Criteria

Match all of the following criteria

- Any
- Field
- SELECT FIELD
- exactly matches
- Value
- ENTER VALUE

Match all of the following criteria

- Any
- Field
- Course
- exactly matches

Field
- Saved List
- Value
- User Field
- Inputs
Creating a Dataset or Ad Hoc query (Report)

Add Criteria

Match all of the following criteria:

- Any
- Field
- SELECT FIELD
- exactly matches
- Value

Enter Value

Course exactly matches

Text (7)

ART_111

Use Blank

OR

Cancel

Apply
### Creating a Dataset or Ad Hoc query (Report)

#### Add Criteria

<table>
<thead>
<tr>
<th>Course</th>
<th>Course Description</th>
<th>Course Number</th>
<th>COURSE SECT.</th>
<th>COURSE_SEC.MEETING</th>
<th>SemType</th>
</tr>
</thead>
<tbody>
<tr>
<td>ART_111</td>
<td>An introductory survey of Western art from the Renaissance to the early 20th century. Distribution Requirements: HE, IP</td>
<td>111</td>
<td>01/SP_ART_111_00</td>
<td>DOAN</td>
<td></td>
</tr>
<tr>
<td>ART_111</td>
<td>An introductory survey of Western art from the Renaissance to the early 20th century. Distribution Requirements: HE, IP</td>
<td>111</td>
<td>00/SP_ART_111_00</td>
<td>DOAN</td>
<td></td>
</tr>
<tr>
<td>ART_111</td>
<td>An introductory survey of Western art from the Renaissance to the early 20th century. Distribution Requirements: HE, IP</td>
<td>111</td>
<td>25092</td>
<td>DOAN</td>
<td></td>
</tr>
<tr>
<td>ART_111</td>
<td>An introductory survey of Western art from the Renaissance to the early 20th century. Distribution Requirements: HE, IP</td>
<td>111</td>
<td>39658</td>
<td>DOAN</td>
<td></td>
</tr>
<tr>
<td>ART_111</td>
<td>An introductory survey of Western art from the Renaissance to the early 20th century. Distribution Requirements: HE, IP</td>
<td>111</td>
<td>16753</td>
<td>DOAN</td>
<td></td>
</tr>
<tr>
<td>ART_111</td>
<td>An introductory survey of Western art from the Renaissance to the early 20th century. Distribution Requirements: HE, IP</td>
<td>111</td>
<td>29320</td>
<td>DOAN</td>
<td></td>
</tr>
<tr>
<td>ART_111</td>
<td>An introductory survey of Western art from the Renaissance to the early 20th century. Distribution Requirements: HE, IP</td>
<td>111</td>
<td>31420</td>
<td>DOAN</td>
<td></td>
</tr>
<tr>
<td>ART_111</td>
<td>An introductory survey of Western art from the Renaissance to the early 20th century. Distribution Requirements: HE, IP</td>
<td>111</td>
<td>33571</td>
<td>DOAN</td>
<td></td>
</tr>
<tr>
<td>ART_111</td>
<td>An introductory survey of Western art from the Renaissance to the early 20th century. Distribution Requirements: HE, IP</td>
<td>111</td>
<td>48179</td>
<td>ARTE</td>
<td></td>
</tr>
<tr>
<td>ART_111</td>
<td>An introductory survey of Western art from the Renaissance to the early 20th century. Distribution Requirements: HE, IP</td>
<td>111</td>
<td>1443</td>
<td>DOAN</td>
<td></td>
</tr>
<tr>
<td>ART_111</td>
<td>An introductory survey of Western art from the Renaissance to the early 20th century. Distribution Requirements: HE, IP</td>
<td>111</td>
<td>19484</td>
<td>DOAN</td>
<td></td>
</tr>
</tbody>
</table>

Sample of 50 records
Creating a Dataset or Ad Hoc query (Report)

Add Criteria

Match all of the following criteria:

- Any
- Field
- Course
- exactly matches

Inputs:

- Field
- Saved List
- Value
- User Field
- Distinct values from data
- Value-Label Pairs
- Input Box
- Chips
- Select Dropdown
- Radio Buttons
Creating a Dataset or Ad Hoc query (Report)

Add Criteria

Input Box

<table>
<thead>
<tr>
<th>Label</th>
<th>Alias</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course</td>
<td>secCourse</td>
</tr>
</tbody>
</table>

6 / 100 9 / 100

Tooltip help
Optional text to explain the input to the User

- [ ] Require value  - [ ] Only allow a single value

Separate multiple values by
Comma

Data Type
Text

Default value

Enter text values
Separate multiple values with a Comma.
Creating a Dataset or Ad Hoc query (Report)

Order By

Sort Fields at the Query level, thus guaranteeing records will stream in that order through Flow Steps. Certain calculations, such as "Merge Duplicates," may take advantage of this to boost performance. The final output does not use this order, but instead defers to the "Sort" option in the column headers.

Select Field

Select Field

* Ascending  ○ Descending

DONE
Creating a Dataset or Ad Hoc query (Report)

Order By

Order by

Sort Fields at the Query level, thus guaranteeing records will stream in the order specified, but instead defers to the "Sort" option in the column headers.

Select Field

Search Fields

COURSE SECTIONS
COURSE SEC MEETING Bldg
Course
Course Description
Course Number

CANCEL
Creating a Dataset or Ad Hoc query (Report)

Row Limit

Limit the number of rows returned by the query. Note, this limit will allow rows in the order they are returned from the Datasonce. Any Flow Steps will only be able to operate on those rows. Additionally, if any Flow Steps or filters add or remove rows, the final row count may differ from this limit. If you are just trying to limit the size of the sample, use sample options.

Enable limit

Row limit

100
Creating a Dataset or Ad Hoc query (Report)

**Flow Steps**

- Add Group
  - ART_111
- Course
  - ART_111
- ART_111
- ART_111
- ART_111
- ART_111
- Art_111
- Sample of 50 records

Options:
- Add Field
- Transform
- Advanced
- Remove

Fields:
- Calculated Field
- Code Field
- Concatenate
- Coordinates from Lat/Lon
- Counter
- Fields from another Dataset
- Percent of Total
- Fields from another Datasource
- Templated Field
- Time Between
- Zip2Geo
Creating a Dataset or Ad Hoc query (Report)

Flow Steps
There are two ways to create a Job:

1. Creating a Job directly from a Query is convenient when already looking at the Data in question or just after building the Query.
2. From the "+ New" button or from inside a Query (Dataset or Ad hoc Query) that will provide some or all of the data for the Job.
Create Job

Need Job Creation Access

Add Data

Refresh Data
NOTE: If you are just looking to refresh a dataset or report, you do not need to add an Action.
Create Job

Schedule a Job

Schedule

Automatically run the Job on a recurring schedule

- Enabled

- Start Date: 9/21/2023

End Date:

None
Create Job

Schedule a Job

Schedule
Automatically run the Job on a recurring schedule

- Enabled

Interval
- Daily
- Every 1 day at 10:27 AM
- Every weekday at 10:27 AM

Next fire times
- Fri, September 22, 2023 at 10:27 AM EDT
- Sat, September 23, 2023 at 10:27 AM EDT
- Sun, September 24, 2023 at 10:27 AM EDT

Start Date 9/21/2023
End Date

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