Informer5 Training

Basic Usage
### Good Morning, Jenna McCann

<table>
<thead>
<tr>
<th>Item</th>
<th>Type</th>
<th>Last Modified</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refresh Active Position Slot Allocations</td>
<td>Job</td>
<td>September 19, 2023</td>
</tr>
<tr>
<td>Active Position Slot Allocations</td>
<td>Dataset</td>
<td>September 19, 2023</td>
</tr>
<tr>
<td>Refresh Active Positions</td>
<td>Job</td>
<td>September 19, 2023</td>
</tr>
<tr>
<td>Deans On Call Information</td>
<td>Job</td>
<td>September 19, 2023</td>
</tr>
<tr>
<td>Active Positions</td>
<td>Dataset</td>
<td>September 19, 2023</td>
</tr>
<tr>
<td>Deans On Call Information</td>
<td>Job</td>
<td>September 19, 2023</td>
</tr>
<tr>
<td>Refresh Count Day Dataset</td>
<td>Job</td>
<td>September 19, 2023</td>
</tr>
<tr>
<td>Count Day</td>
<td>Dataset</td>
<td>September 19, 2023</td>
</tr>
<tr>
<td>State-to-Colleague transfers</td>
<td>Dataset</td>
<td>September 19, 2023</td>
</tr>
<tr>
<td>Refresh Active Positions TEST</td>
<td>Job</td>
<td>September 19, 2023</td>
</tr>
<tr>
<td>Active Positions TEST</td>
<td>Job</td>
<td>September 19, 2023</td>
</tr>
<tr>
<td>Send Advisor/Coach Academic Alerts Notifications</td>
<td>Job</td>
<td>September 19, 2023</td>
</tr>
<tr>
<td>Run Award History</td>
<td>Job</td>
<td>September 19, 2023</td>
</tr>
<tr>
<td>Send Student Success Academic Alerts Notifications</td>
<td>Job</td>
<td>September 19, 2023</td>
</tr>
<tr>
<td>Refresh Academic Alerts Submissions</td>
<td>Job</td>
<td>September 19, 2023</td>
</tr>
</tbody>
</table>

Showing all 1837 items
### Home Page

#### Search Bar
Search for items using keywords, folders, tags, type, or owner.

#### Filter Options
- Refresh Active Position Slot Allocations
- Active Position Slot Allocations
- Refresh Active Positions
- Active Positions
- Deans On Call Information
- Refresh Count Day Dataset
- Count Day
- Slae-to Colleague transfers
- Refresh Active Positions TEST
- Active Positions TEST
- Send Advisor/Coach Academic Alerts Notifications
- Run Award History
- Send Student Success Academic Alerts Notifications
- Refresh Academic Alerts Submissions

#### Favorites
Favorites for quick access to important items.

#### Choose Columns
Customize the display of columns for a more tailored view.

#### Refresh
Update the displayed items to reflect the most recent data.
Ad Hoc Queries (Reports) vs Datasets

- Datasets have permanent data storage whereas ad hoc queries/reports have temporary data storage.
  - This means datasources will always show data but it may not be the most up to date depending on when it was last run.
  - Ad hoc queries do cache data for a short amount of time but will need to be run everytime you want to see the data after the cache.
- If a dataset needs refreshed, click the refresh button within the dataset.
- If a report needs run, click run within the report.
- Run time depends on the amount of data within the dataset or report.
- Datasets and reports can be automatically run via Jobs. (need specific access to create Jobs). These can be scheduled on a recurring schedule.
Running an Ad Hoc Query
Running a Dataset

No data to show.

RUN QUERY
### Refreshing a Dataset

Last refresh/run time:

As of: Sep 19, 2023 at 9:09 AM  |  Records: 4,240

#### Data Table

<table>
<thead>
<tr>
<th>Description</th>
<th>Course</th>
<th>Course No</th>
<th>Course Sections</th>
<th>Course Types</th>
<th>Department</th>
<th>Short Title</th>
<th>Subject</th>
</tr>
</thead>
<tbody>
<tr>
<td>AP*SIO</td>
<td>BIO</td>
<td>101</td>
<td>00/FA_APL_101</td>
<td>00/SP_APL_101</td>
<td>BIO</td>
<td>College Elect Adv Placement</td>
<td>AP</td>
</tr>
<tr>
<td>AP*CMP</td>
<td>CMP</td>
<td>102</td>
<td>00/FA_APL_102</td>
<td>00/SP_APL_102</td>
<td>CMPSC</td>
<td>College Elect Adv Placement</td>
<td>AP</td>
</tr>
<tr>
<td>AP*ENG</td>
<td>ENG</td>
<td>103</td>
<td>00/FA_APL_103</td>
<td>00/SP_APL_103</td>
<td>ENOL</td>
<td>College Elect Adv Placement</td>
<td>AP</td>
</tr>
<tr>
<td>AP*ENV</td>
<td>ENV</td>
<td>104</td>
<td>00/FA_APL_104</td>
<td>00/SP_APL_104</td>
<td>ENOL</td>
<td>College Elect Adv Placement</td>
<td>AP</td>
</tr>
<tr>
<td>AP*F5</td>
<td>F5</td>
<td>105</td>
<td>00/FA_APL_105</td>
<td>00/SP_APL_105</td>
<td>ENOL</td>
<td>College Elect Adv Placement</td>
<td>AP</td>
</tr>
<tr>
<td>AP*LS</td>
<td>LS</td>
<td>106</td>
<td>00/FA_APL_106</td>
<td>00/SP_APL_106</td>
<td>ENOL</td>
<td>College Elect Adv Placement</td>
<td>AP</td>
</tr>
<tr>
<td>AP*PHY</td>
<td>PHY</td>
<td>107</td>
<td></td>
<td></td>
<td></td>
<td>College Elect Adv Placement</td>
<td>AP</td>
</tr>
<tr>
<td>APL*102</td>
<td>102</td>
<td>00/FA_APL_102</td>
<td>00/SP_APL_102</td>
<td>00/SP_APL_101</td>
<td>ART</td>
<td>Academic Planning I</td>
<td>APL</td>
</tr>
</tbody>
</table>

![Refresh Button](image.png)
Filtering
Filtering
Filtering

Wildcard value = ‘*’

‘AP*’ will grab all Course that start with ‘AP’
### Filtering

**Data**

- **Course**
  - AP/BIO
  - AP/CMP
  - AP/ENG
  - AP/ENV
  - AP/PS
  - AP/LS
  - AP/PHY
  - AP*102

**Course Sections**

- BIO
- CMP
- ENG
- ENV
- PS
- LS
- PHY
- 102

**Course Types**

- BIO
- CMP
- ENG
- ENV
- PS
- LS
- PHY
- 102

**Department**

- College Elect Adv Placement

**Short Title**

- AP

**Subject**

- AP

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## Filtering

The screenshot shows a dataset management interface with a filter applied. The filter is set to match courses starting with 'AP B' and 'BIO'. The dataset includes columns for 'Description', 'Course', 'Course No', 'Course Sections', 'Course Types', 'Department', 'Short Title', and 'Subject'.

The filtered results include:
- **AP B**
- **BIO**
- **BIO**
- **College Elect Adv Placement**
- **AP**
Other Options - Grouping
Other Options - Select Columns

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<tr>
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<th>Subject</th>
</tr>
</thead>
<tbody>
<tr>
<td>AP/GEO</td>
<td>GEO</td>
<td></td>
<td></td>
<td></td>
<td>College Adv Placement</td>
<td>AP</td>
<td></td>
</tr>
<tr>
<td>AP/CMP</td>
<td>CMP</td>
<td></td>
<td></td>
<td></td>
<td>College Adv Placement</td>
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<td></td>
<td></td>
<td></td>
<td>College Adv Placement</td>
<td>AP</td>
<td></td>
</tr>
<tr>
<td>AP/ENV</td>
<td>ENV</td>
<td></td>
<td></td>
<td></td>
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As of: Sep 19, 2023 at 9:09 AM Records: 4,240
Other Options - Aggregates

![Screengrab of a data management interface with options for data aggregation](attachment:image.png)
Other Options - Show Field Aliases

Shows the alias used from the datasource (Colleague)
Create pivot table based on data from report. Add the columns, rows and values.

Add visuals such as bar graphs, pie charts etc

Shows all the fields and information used in the report.

Shows the mapping, criteria, inputs and flow steps used in report.

Shows the owner and sharing options.

Shows if there are Jobs attached to the report.

Comments can be added within the report.

Shows the name and description of the report.