Informer5 User Guide

Informer5 is a very powerful web-based reporting tool that connects to the college's information systems (*Ellucian Colleague* or others) to deliver accurate and consistent information from the shared repository used by all departments on campus.

The new Informer user interface (UI) simplifies navigation by bringing content front and center to the Home Screen.

The intuitive UI adds new ways for Users to create and use content from the Home Screen. Favorites, content, members, and feed all in one view. Actions next to each row allow the Information Side Panel to be optional. More columns on the List Pages let Users pick which columns to see and in what order.
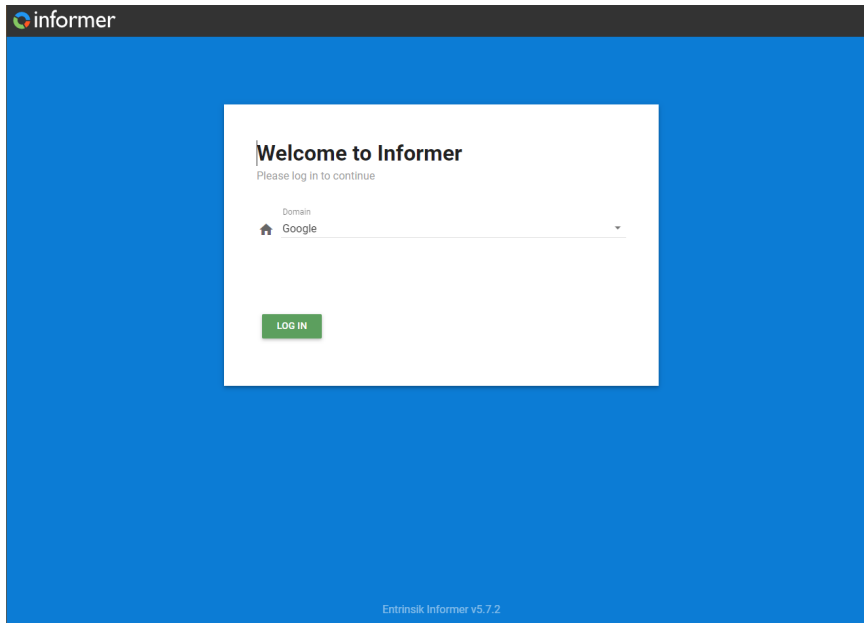
Simplified navigation with the Informer breadcrumb bar allows Users to switch between different areas of the system faster than ever. Advanced searching and organization options on the main list pages focus on speed and customization.

The redesigned Informer workflow provides a natural feel and a consistent experience, increasing the ease and effectiveness of accessing, analyzing, sharing, and automating data.

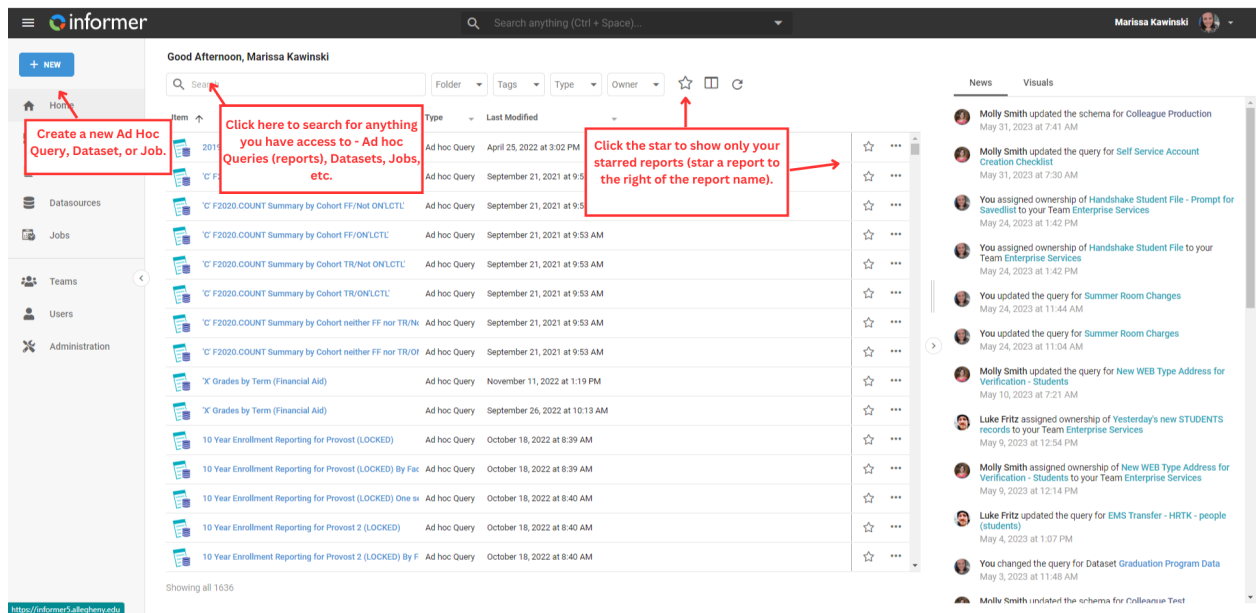# Table of Contents

Access

Informer5 can be accessed by visiting https://informer5.allegheny.edu in any web browser. Informer5 uses single sign on authentication using your Allegheny Google account. If you are logged into your Allegheny email, click **Log In** and you will be redirected to the home page of Informer 5.

Upon logging in for the first time, you will not have access to any reports other than those that are labeled as Public. Please contact ITS by entering a WebHelp ticket with Request Type of *Enterprise Systems (Colleague, Informer, Webadvisor, etc)* and we will add you to the appropriate Team within Informer to extend your access to reports owned by or shared with your department.

Home Page

Informer allows you to quickly access your favorite Ad Hoc Queries (Reports) and Datasets. Mark a report as a favorite by clicking the star outline in the right-hand column of the report listing. Click again to remove from your favorites. Quickly access your favorite reports by clicking the star to the right of the search bar above the list of content on the home page.

Good Afternoon, Marissa Kawinski

Create a new Ad Hoc Query, Dataset, or Job.

Click here to search for anything you have access to - Ad hoc Queries (reports), Datasets, Jobs, etc.

Click the star to show only your starred reports (star a report to the right of the report name).

Showing all 1636

Datasets vs. Ad Hoc Queries

There are two types of Queries in the system - Dataset and Ad Hoc. Datasets are the preferred method for working with data. Dataset Queries are a more flexible way to manage and share larger results.

The Dataset Queries promote data governance by creating one source of truth. Using a Dataset as the source for several Reports lends to the consistency of data across an organization.

There are times when it is necessary to use Ad Hoc Queries to give fast, temporary results based on run-time parameters.

Refreshing a Dataset Query is similar to running an Ad Hoc Query but may not always be the best option. For instance, if the content is dependent on a Dataset and users are expecting the Dataset to refresh at specific times then an Ad Hoc Query is preferable.

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

They 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.

Creating and editing both types of Queries use the same process.

Use the Query Designer to add Fields, Criteria, Flow Steps, and other customization that authors might need when preparing data.

NOTE: *Some flow steps will require Javascript knowledge. Contact ITS via WebHelp ticket for help creating these flow steps.*

Both Query types can be shared with other Users and Teams in the system. Sharing a Dataset will grant Users or Teams read-only access to the Dataset Query's results but not the ability to refresh the Query. Since an Ad Hoc Query's results are user-specific, sharing an Ad Hoc Query grants Users or Teams the ability to run the Ad Hoc Query.

Creating a Dataset or Ad Hoc Query/Report

To create a Dataset or Ad hoc Query, go to the Home Page and click "New". Select the type of query and then "Query Designer". Enter a name for the Dataset or Report, select the Datasource the Query (**Colleague Production or an existing Dataset if creating a Ad Hoc Query**), then select which Mapping the Query will be starting from. Then click "Save" to go to the Query edit page.

From here, the Query build process is the same as what is covered in the **Adding Fields** category.

Adding Fields

Add Fields to a Query to customize it to display certain fields in the results. Fields in CSV-generated Datasets come from the file so there is no option to add extra Fields.

Add Fields to the Query by clicking the "+" icon next to "Fields". A panel displays a list of Fields in the Mapping that the Query is using. Along the left side of the panel is a list of other Mappings that have links to the starting Mapping. The list of Fields provides basic information about the Field's data type, name, and database name. Click the magnifying glass icon under the "Sample" column for a sample of the data.

Click the "Add" button to the right of the Field to add a single Field or click "Add All" at the top of the panel to add every Field. Click the "X" button to the right of a Field's row to remove it.

Adding Fields From a Linked Mapping

Add a Field from a linked Mapping by clicking on the links on the left side of the panel. Some Mappings will have an arrow next to them signifying that the extra links exist for that Mapping. Click on the arrow to expand a new list of linked Mappings to add Fields. The Fields on the right side will change to reflect the new Mapping.
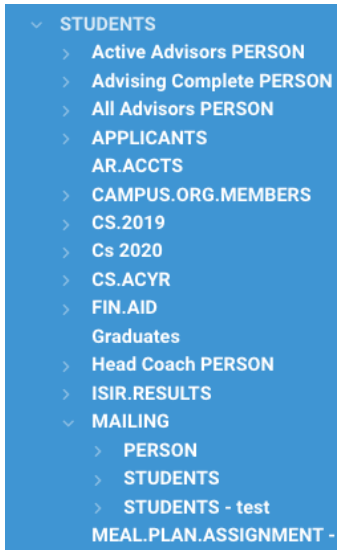
After adding Fields, click "Close" at the bottom corner of the window to display a sample of the Query with the selected Fields. Click "Save" in the top-right corner to save changes.
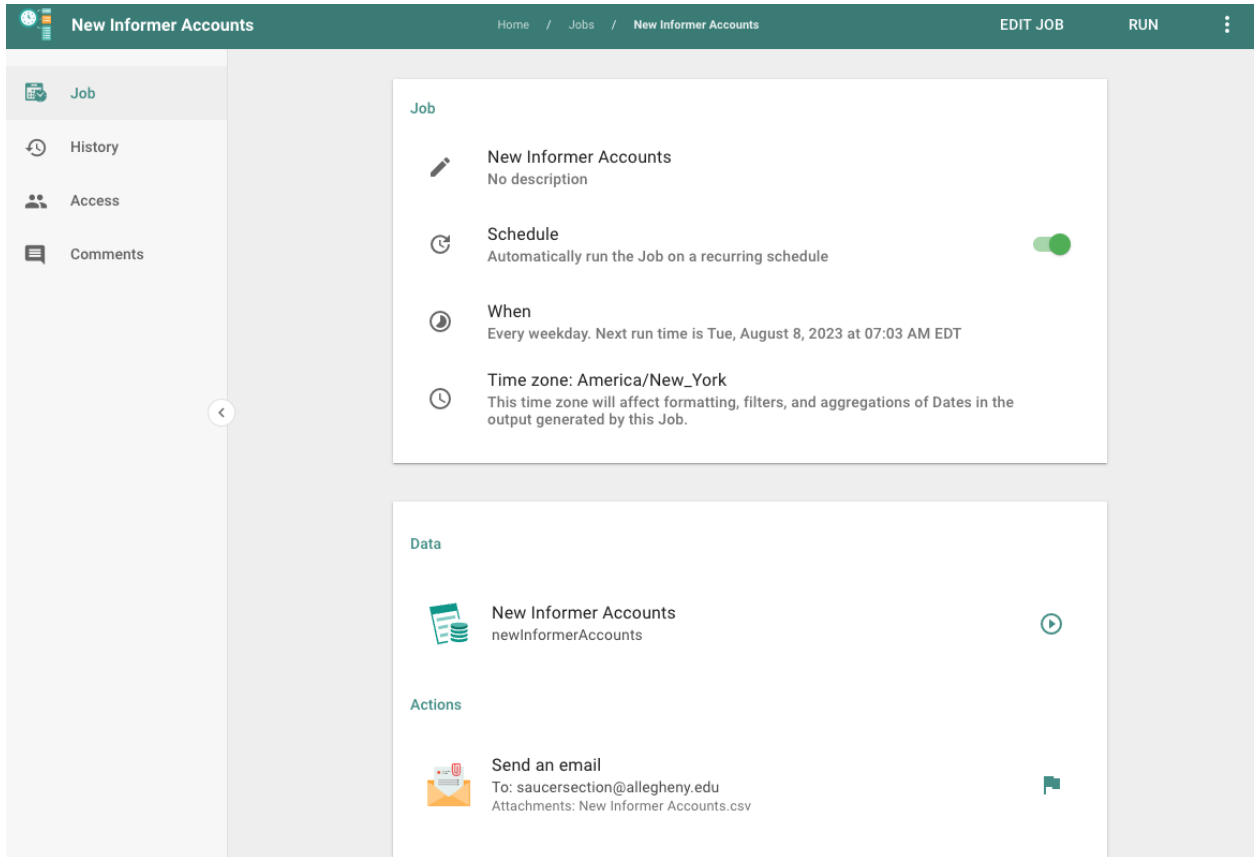
Running a Dataset or Ad hoc Query

After adding data to the Dataset or Query/Report, it will need to be run to view the data. Click the "Run" button at the top right of the page. Datasets will show a "!" if the underlying dataset definition has been changed and it will need re-run to show the changes.


Creating Jobs

Jobs provide the ability to filter data and display it in a number of different ways without any manual interaction beyond the initial setup. A Job is a task or collection of tasks to be executed using data in the system. Automate these tasks using a recurring schedule or simply save them in the system so that they may be manually triggered when needed. The three main components of a Job are the data that the Job uses, the Actions that the Job executes, and the schedule that triggers the Job.

NOTE: *You will need the correct access to create Jobs. Contact ITS via WebHelp to request access.*

There are two ways to create a Job - either 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.

Click the "+ New" button in the top-left of the screen and select "Job". Give the Job a name and, optionally, a description. Then click "Save".
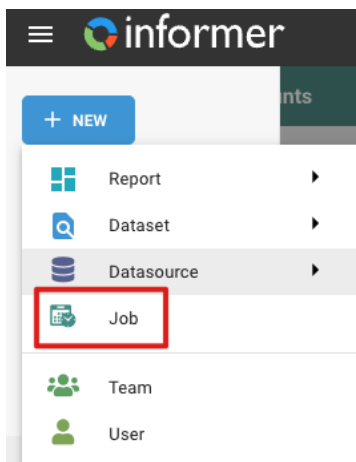
To create a Job from a Query (either a Dataset or Ad hoc Query), click on the "Jobs" icon on the left-hand menu (the calendar icon). This screen is a Job Listing page showing all the Jobs that use this particular Query, with the ability to create a new Job that will also contain this Query by default.
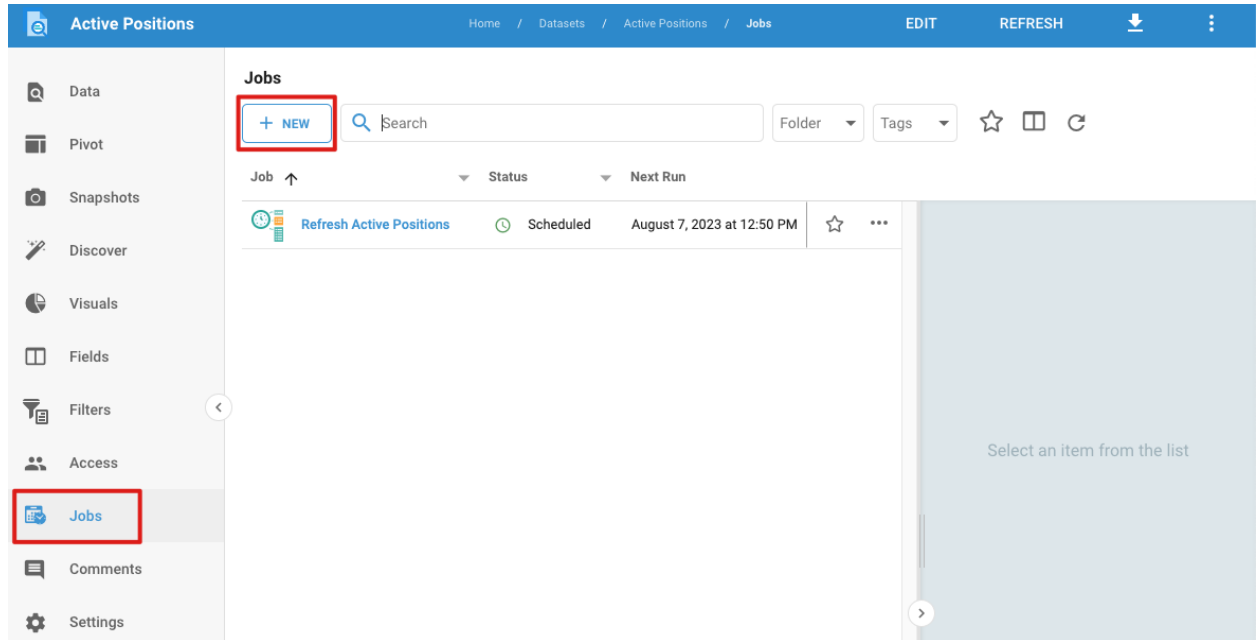
Creating a Job directly from a Query is convenient when already looking at the Data in question or just after building the Query.

Adding Data to a Job

The first part of configuring a Job is defining the data to use from one or more Datasets or Ad-hoc Queries. There is no hard limit on the amount of data that can be in a single Job, although if a Job is refreshing multiple large queries, then the Job will take longer to run. When creating a Job from scratch, click either the "Add Data" button in the middle of the Job edit page or click the "+" icon in the top-left of the edit page.
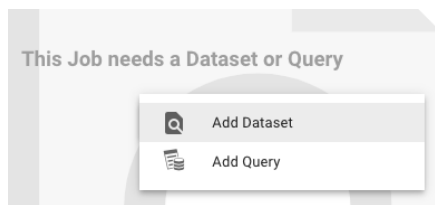
When a Job already contains data, clicking the "+" icon will allow for the addition of more data to the Job. Any data added to the Job will be run in sequence, from

the top of the list to the bottom of the list. There is no hard limit to the number of data components that can be added to a Job.

Datasets in a Job

View the data contained in a Dataset after adding a Dataset to a Job by clicking on its name in the top-left panel. There will also be other options at the bottom of the UI that will facilitate interaction with the Dataset. Just like when viewing a result set directly on the Dataset itself, the column ordering and Field settings are available for manipulation and customization within the Job (Field Options). Any changes will only affect the Dataset format inside of this Job. One use case for this is sending an email within a Job with a result set that needs to have a different column ordering of the email's attachment than the column ordering in the original Dataset.

Filters

Add post-query filters to a result set in a Job by clicking the "+" button at the top of the grid. This is helpful in use cases where there is a single Dataset containing multiple groups of information when only a subset of the groups is desired. Add a Filter to a Dataset's Job to ensure that any emails sent out meet your use case scenario.

Refresh

Manually refresh or change inputs in the Job by clicking the "Refresh" / "Change Inputs" icon (the replay arrow) at the bottom of the grid. If there is an Input configured on the Dataset, changing the Input here in the Job would also change the Input for the entire Dataset. This may affect Reports tied to this Dataset. Use an Ad-Hoc Query to freely change the Inputs on data in a Job.

Refresh the Dataset when the Job executes by opening the dropbox at the bottom of the grid and selecting "Refresh on job run". In some cases, it is not necessary to refresh the Dataset in a Job. For example, if the Job triggers an action to send an email or write a file to a remote location and there is data already in the Dataset.

Additionally, there is the option to take a Snapshot of the Dataset when a job executes. This is useful to capture the specific version of data that is part of the Job so that it may be referenced at a later point.

Refresh on Job run

REMOVE

Take Snapshot on Job run

DONE

wing all rows
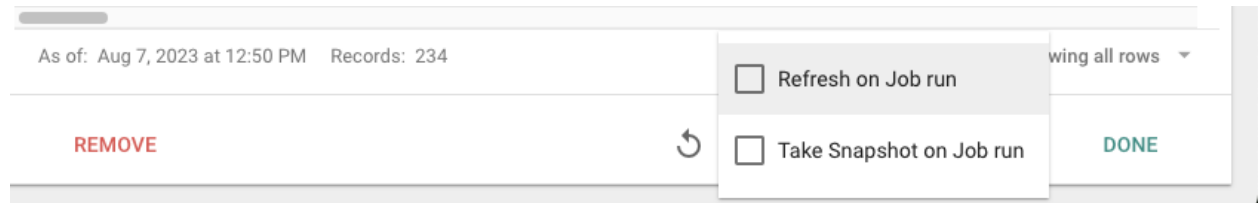
Reset Grid

When creating Jobs, users may reorganize the data held in the underlying Dataset. However, there are instances where Users will need to reset the Dataset to its original state. To do so, use the "Reset grid settings to those of the underlying Dataset" button found on the data editor window.

Ad Hoc Queries in a Job

Adding an Ad hoc Query to a Job is similar to adding a Dataset to a Job with the following exception, an Ad hoc Query saves its results only for 60 minutes by default. Therefore, the Query inside of a Job needs refreshing every time the Job executes; otherwise, the Query will stay empty and not return data.

That said, after adding an Ad hoc Query to a Job and clicking on it in the top-left, the display panel will show the words "Run Query". Since an Ad hoc query does not stay populated with data, the Query needs to run first inside of a Job to preview the data before the Job runs.
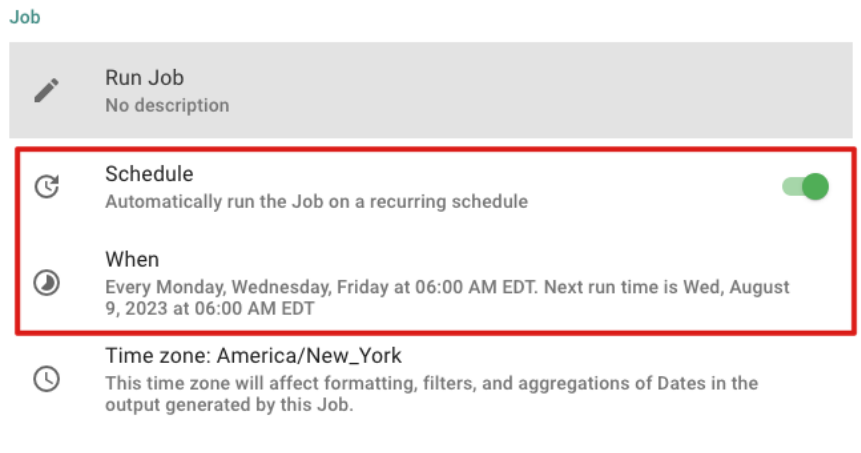
After clicking "Run Query", the Ad hoc Query will execute as expected and the display panel on the right populates with data. Column order and Field settings are now available for customization (Field Options while Viewing), and changes made here will only affect the Ad hoc Query inside of this Job.

To add post-query filters to a result set in a Job, click the "+ Filter" top. This is helpful in use cases where the returned result needs filtering before it goes out in an email or is written to a file.

When creating Jobs, users may reorganize the data held in the underlying Query. However, there are instances where Users will need to reset the Query to its original state. To do so, use the "Reset grid setting to those of the underlying Dataset" button found on the data.
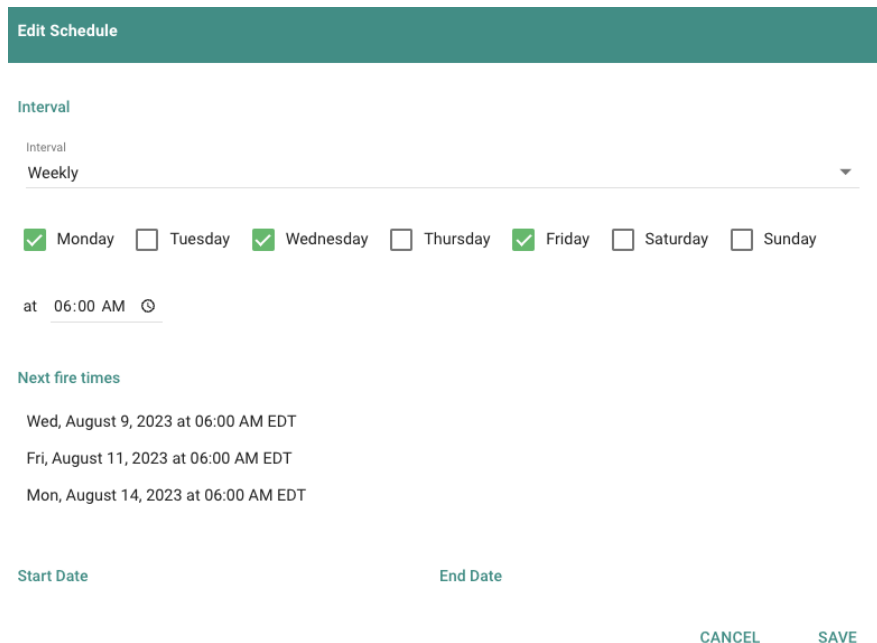
Scheduling a Job

To set up a Job schedule, first, enable the "Schedule" toggle on the Job's detail page to show the "When" section in the UI. Next, click on the "When" section and choose from any of the refresh interval options available.

Intervals available for schedules range from minutes, hourly, daily, weekly, monthly, yearly, or to other custom intervals as determined by a CRON syntax job. The next three fire times display while configuring the refresh interval to visualize better when this Job will fire. Start and End Dates indicate a beginning and end date for this Job. Click on "Save" to finalize the refresh interval for the Job.

After saving the schedule interval, the Job Details page reflects the configured refresh interval, giving a quick and easy reference to see the next time a specific Job runs. Click back into the "When" section to update the configured interval. To disable a schedule, unselect the Schedule flag. Informer retains the last interval configured, providing a starting point for the time the schedule is enabled.

Actions Overview

The "Actions" menu contains many useful options for viewing, modifying, and distributing data within a Query. Access this menu through either the Dataset Listing page for Dataset Queries or the Report Listing page for Ad-hoc Queries then select the desired Query. Next, click the three vertical dots "Actions" button in the top-right corner to open the Actions menu.

Assign Tags

Assign Tags is where existing tags are attached to a Query. For more details, or to learn how to make new tags, see Organizing Content.
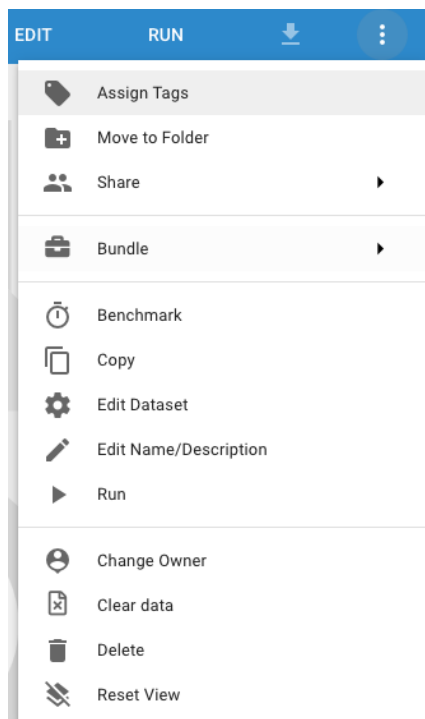
Move to Folder

Move to Folder moves the Query to a new or existing folder. For more information, see Organizing Content - Folders.

Share

Share has options to share the Query or Fields with other Users.

Add Shares to Users/Teams

Allows the Owner of the query to share it with other Users or Teams within Informer. Any existing sharing for the specified Users and Teams will be overwritten by the settings selected below. Additionally, use this option to set Row Level Security for the shared Query. The shared Dataset will appear to only have the records after the Filter has been applied.

Create a Query Token

Create a Query Token enables sharing data with authorized users outside of Informer 5. For more information, see API Tokens.

Grant Field Access to Reports

This option allows Users to toggle whether Fields from the Query to be used in Reports regardless of inherited security settings.

Bundle

Add to Bundle allows for the Exporting of the selected Query to an existing or new Bundle. See Bundling for more.
Bundle and Download immediately creates a bundle of the Query and downloads the file. See Bundling for more.
Bundle and Deploy to Tenant allows for the Exporting of the selected Query and Import to one or more Tenants. See Bundling for more.
Copy
Copy creates a copy of the current Query. See Copying, Deleting, and Renaming.

Create Data View Report

Create Data View Report generates a Data View Report using the current Dataset. This option is only available on Datasets.

What is a Data View?

A Data View is a row and column grid sourced from a single Dataset. Data Views provide record-level detail in a familiar spreadsheet-type format allowing for on-the-fly groups, sorts, aggregates, formatting, and Pivot Tables.

Edit

Edit opens the Query's Edit page (Figure 6). Edit is also available in the top-right corner via the "Edit" button.

Edit Name/Description

Edit Name/Description allows for updating the Query name and or description (Figure 7). See Copying, Deleting, and Renaming.

Refresh

Refresh runs the Query pulling in the latest data (Figure 8).

Change Owner

Change Owner gives ownership of the Query to another Team or User. For more information on giving ownership, see Ownership and Access.

Clear User Settings

Clear User Settings clears user-specific settings set within the Query to the default values.

Clear Data

Clear data removes all the data within a Dataset. This option is only available on Datasets.

Delete

Delete permanently removes a Query from the system. See Copying, Deleting, and Renaming.

FAQs

- How do I know when a dataset was last run?
    - At the bottom of the dataset, there is an *"As of"* line that has the date and time of the last run.

As of: Aug 28, 2023 at 11:25 AM   Records: 1,623

- I have run and edited the dataset/report but the columns/data is not updating. What should I do?
    - Sometimes a user's view is cached in the system. To clear those settings, click on the three dots at the top right of the dataset/report, then click Reset View.
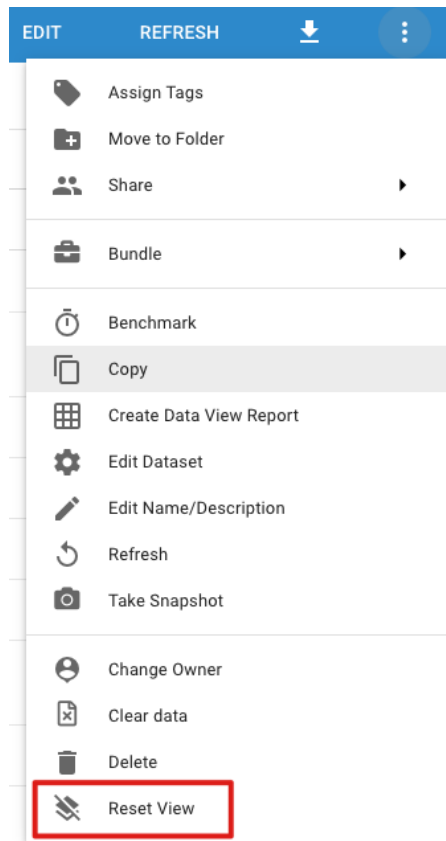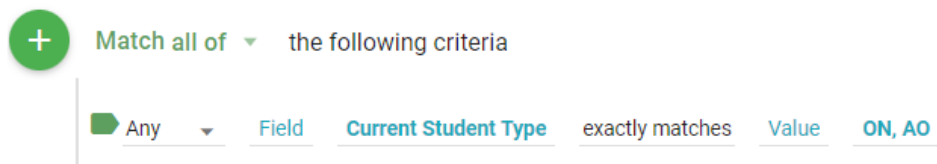

- My data is returning thousands of results. How do I only get students that are here?
    - You will need to specify your criteria to only bring in ON or AO students. You can do this 2 ways:
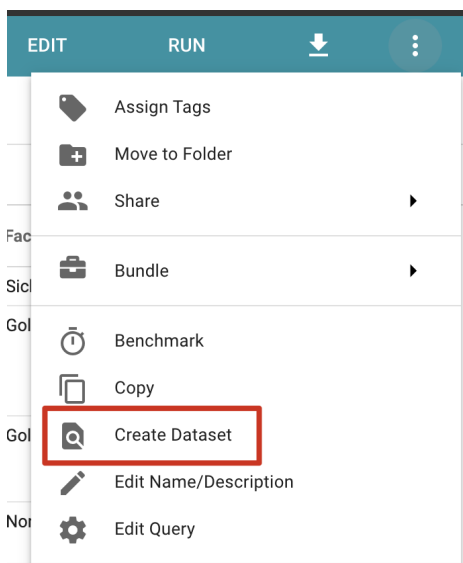   1. Use the saved list X.STUDENT.ONAO
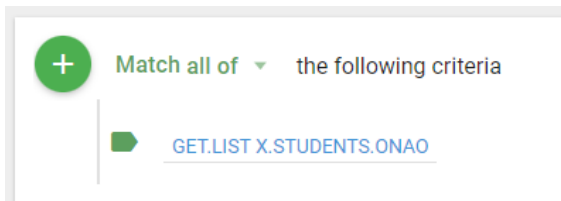
a.

2. Add criteria and pull in Current Student Type.

a.

- How do I convert an Ad Hoc Query (report) into a Dataset?
  - First, you will need to run the report in question to produce results. Then, go to the three dots at the top right of the report and click **Create Dataset**.

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