Information Technology Services

Technical Management

Systems

User Guide

Entrinsik Informer 4 User Guide

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1 Purpose

The purpose of this document is to define the basic overview, function, usage, and login procedures for Entrinsik Informer 4 for Fayetteville Technical Community College (FTCC) Faculty and Staff. This document will also attempt to explain the page navigation, creation, maintenance, and launching of Informer 4 reports.

2 Scope

These procedures apply to all Information Technology Services staff, whether full- or part-time, paid or unpaid, temporary or permanent, or volunteers. If any particular information at FTCC is governed by more specific requirements under other College policies or procedures, the more specific requirements shall take precedence over these procedures to the extent there are any conflicts.

3 Acronyms/definitions

- **FTCC** - Fayetteville Technical Community College.
- **ITS –** Information Technology Services.
- **AD** - Active Directory.
    - AD is a directory service, such as Active Directory Domain Services (ADDS), that provides the methods for storing directory data and making this data available to network users and administrators.
    - For example: AD DS stores information about user accounts, such as names, usernames, email addresses, phone numbers, etc., and enables other authorized users on the same network to access this information.
- **Colleague** is a database used to verify FTCC Faculty/Staff/Student information.
- **Informer** is a reporting tool used to extract information from the Colleague system.

4 Procedures

Note: It is assumed that, when a user has been granted access to Informer, they already have a basic understanding of the Datatel data structures as they apply to college business processes and cycles. This document does not attempt to describe the data files and processes that make up the Colleague UI application.

4.1 Accessing Informer 4

1. Access Informer 4, using the link: https://informer.faytechcc.edu/informer/?locale=en_US
   a. *Note*: For quick access, please bookmark the link in your browser
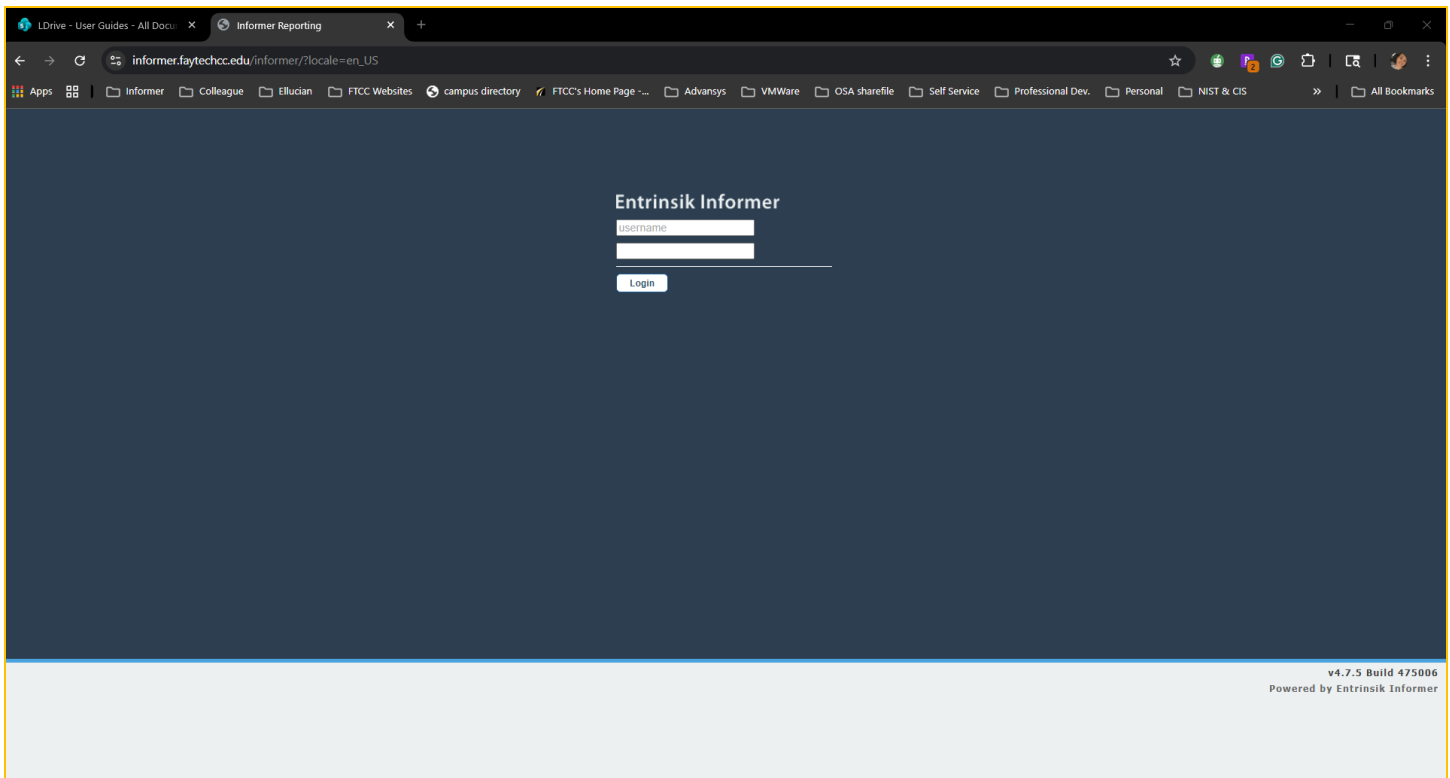
2. Please log in with your credentials. Examples can be found below:
   a. Username: johng0316
   b. Password: Use your current Active Directory password.
      i. To reset your password, please click here: https://www.faytechcc.edu/its/self-service-password-reset/
         1. Scroll down and follow the instructions as listed.
      ii. If you are not able to reset your password, please contact the Service Desk at help@faytechcc.edu or 910-678-8205
         1. You may also submit a KACE ticket here: https://kace01.faytechcc.edu/
            a. Please ensure you state:
               i. Who – Who has the problem
               ii. - What is the problem
               iii. When – When did the problem begin, and/or when does it happen
               iv. Where – What is your office location and/or the location of the issue (main campus, off campus, etc.)
   c. **Note**: Allowing another user to access any college resources using your login credentials is a violation of the College Operating Procedures.

4.2 Reporting Dashboard

The "**Reporting Dashboard**" will serve as your home page when you log in. The general appearance of this page will be the same for each user; however, the specific content will be specific to the access rights granted to the user logging in. This home page is where you will spend the bulk of your time, as it is the workspace for creating, testing, and launching reports. It is also where the report data archives that you create are stored. The following is a detailed breakdown of the home page.
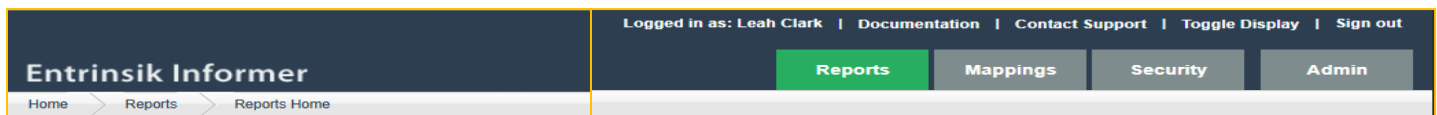

4.2.1 Reporting dashboard – Menu Bar

1. "Logged in as": Identifies the name of the individual who is logged in.
2. "Documentation": connect to the Entrinsik documentation site.
3. "Contact Support": Automatically contacts the FTCC service desk via email
4. "Toggle Display": Allows you to toggle the display of fields using either their assigned field names or column headers (more information on this later)
5. "Sign out".
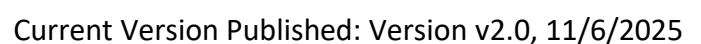
4.2.2 Reporting Dashboard – Navigation Bar

This bar reminds you of where you are relative to your homepage. As you navigate from the home page, Informer will update the bar so that it always indicates where you are relative to the home page. These clickable tab bars are a way of navigating Informer.

1. In the example below, the **current page** is Home>Reports>Reports Home
2. The "**Reports**" tab on the right side of the bar, highlighted in green, means that it is the current tab selected.
3. The "**mappings**" tab is only visible when granted access to view the data mappings available for reporting in Informer.
   a. If you have access to the Mappings tab, you can use it to navigate to a Data sources Home page with access to all the descriptive information about the Data that you authorized
      i. **Note**: The Data Sources home page is described later in this document

4.2.3 Reporting Dashboard – Reports & Archives

These tabs are used to navigate the two main sections of your home page.

a. If the "**REPORTS**" tab is selected, the description beneath it will state "Reports Home", "Reporting Dashboard", and "Manage your Reports"
   i. The content of the lower menu will be limited to your reports ONLY.
b. If the "**ARCHIVES**" tab is selected, the description beneath it will state "Data Archives Dashboard" and "View your data archives."
   i. The content of the lower menu will only include information about archives (output from previous report launches) that you have created.
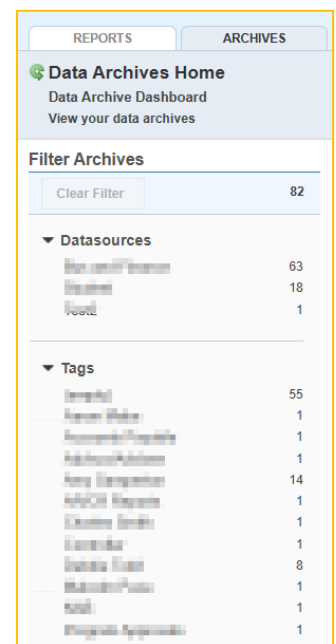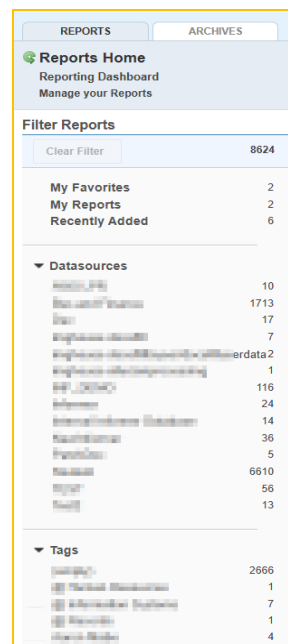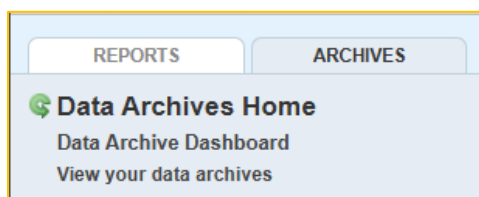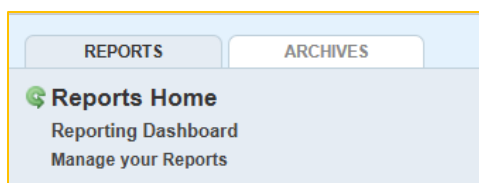
4.2.4 Reporting Dashboard – Reports

1. When the Reports tab is selected, the contents of the lower section of the page describe:
    1. All of your reports or reports you have access to
        a. "Your reports" doesn't mean just the reports that you create, but instead any report in Informer that is considered public or has been shared with you by other users
        b. This means you will have access to reports that you did not create
    2. Filter tools that can be used to help organize and retrieve your reports.
        a. Organize by "Data sources", "Tags", "Departments", "My favorites", "My Reports", "Recently Added", etc.
        b. The Filter Reports panel below will be similar to what will appear on every user's home page. By clicking the different filters on the panel, you can change the content of the Reports Listing section so that it only includes those reports that satisfy the criteria defined by the filter.

The "**My favorites**" filter can be used to limit the Reports listed to only those that you have flagged as favorites; otherwise, all reports will be listed. "**My reports**" limits the search to just the reports you have created. "**Recently added**" are any reports created that are public, tagged or shared by others that you have access to.

The "**Datasources**" Filter can be used to limit the reports shown to only those that use the Data source selected. As most users will only have access to one Data source, the Reports listed will not change.

Filtering by "**Tag**" provides the most benefit when trying to organize, manage, and retrieve reports. Tags are assigned to reports when they are created. They can also be assigned and removed from existing reports. Tags can be used to organize reports into groups, such as reports developed by or for the Admissions or Counseling departments. If the Admissions tag is clicked on the Filters panel, all reports tagged as Admissions that you are authorized to see will be listed.

2. **"My Favorites" filter**
   a. To <u>flag a report as a favorite</u>, simply click the Star symbol shown under the favorite column in the report listing area of the page.

        i. The Icon will turn yellow, and the My Favorites tab in the panel will be incremented by 1.

   b. To <u>remove a report from favorites</u>, simply click the icon again, and it will return to its original state.

        i. In the example below, two of the reports shown have been selected as favorites, and one is not.

           1. **Note:** In the filter panel, the My Favorites header indicates that there are 2 of the 280 reports flagged as favorites. If you want to see only your favorite reports listed in the Report listing area, simply click the My Favorites heading.

3. **"Datasource" filter**
   a. Choose whether to limit the report listing to only those reports that use the selected Datasource.

        i. In most cases you will only have one Datasource listed, rendering this filter ineffective.

4. **"Tag" filter**
   a. Tags are not private.
      i. If a user creates a Tag to classify or organize a group of reports, that tag is available for use by all Informer users.
      ii. If multiple users tag their reports using a common tag, they will only see the reports that they own or are authorized to see when clicking the tag.
   b. You cannot delete a tag
      i. But, if you delete all your reports from a tag, the tag will no longer appear in your panel when you log in.
   c. If you create a tag and assign it to reports, or assign an existing tag, and share any of the reports in the tag, the tag and associated reports will be visible to those users that you have authorized.
   d. If you create a report and do not assign a tag, a new tag named (empty) will appear in the tag filter panel, along with a total indicating how many reports there are that do not have a tag.
   e. Tags are one-dimensional.
      i. You cannot create sub-tags under existing tags.
   f. A report can have more than one tag assigned to it.
      i. It is common to try to equate tags to folders, but they are not folders. There is a single copy of each report or query created in Informer.
         1. If you assign 5 tags to a query, that query's name will appear when clicking each of those tags; however, there is only one copy of the report.
         2. This is important if you are building and sharing reports with other users or departments. A better delivery method might be to make a copy of the report and share it.

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4.2.4.1 Report Dashboard – Report Listing navigation bars

Every user's home page will include a Reports Listing panel similar to the one shown below. The items listed in the panel will be determined by the user's access rights and filter selections made.


1. **At the top of the Reports listing panel** is a header bar similar to the bar shown

below:

2. On the **right side of the header bar** is a list of tools that can be used to make changes or set certain criteria for reports searched in the search box.
    a. "Tags", "Favorite", "Delete", "Change owner", and "Package" are the available list items. If any of these are grayed out, it means that option is disabled.
        i. The option will become enabled if reports are selected in the listing area. It includes options to delete reports, manage favorites, and manage tags of the selected reports.
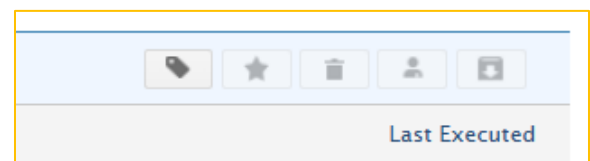
3. When **selecting a report,** always select a report by clicking in the white space beside the report title or using the check box available to the report titles in the "report listing" area.
   a. If you click the report title itself, it displays the report details (overview) instead of selecting it.
   b. You can select multiple reports using the control/click or shift/click combinations that you typically use in Windows applications.

Reports Listing

| ☐ ▼ | Search Reports | X |

Report Title

☐ test

☐ 4 hr refund of payroll - 2015 TOTALS & DETAIL
    GLA.2015 TOTALS & DETAIL.
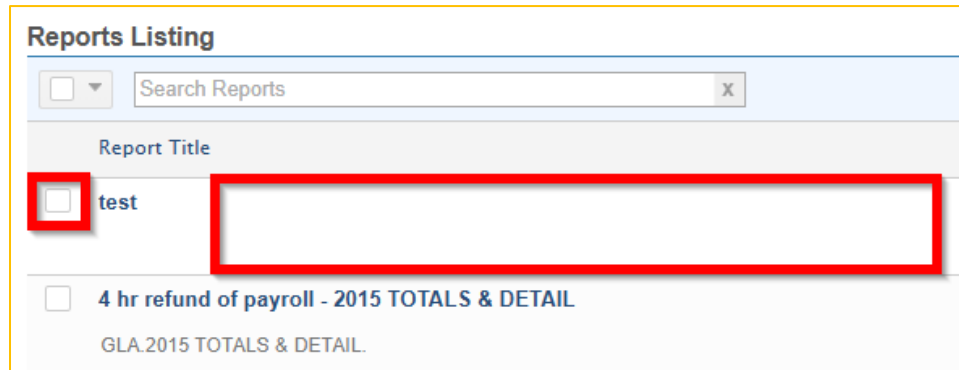
4. To **sort the contents of the report listing page**
   a. The items can be sorted by ascending or descending Report Title by clicking the Report Title Column heading.

Reports Listing

| ☐ ▼ | Search Reports | X |

Report Title

☐ test

☐ 4 hr refund of payroll - 2015 TOTALS & DETAIL
    GLA.2015 TOTALS & DETAIL.

☐ Academic Enrollment By Program
    Generates a list of students enrolled by program by term. Can be used to identify students, a

Reports Listing

| ☐ ▼ | Search Reports | X |

Report Title ▾

☐ ZZZ without privacy flag X (Person + Institutions)

☐ ZZZ without privacy flag X (People Only) Copy Copy (2) Copy (2)

☐ ZZZ without privacy flag X (People Only) Copy Copy (2) Copy

5. If the **number of reports to be listed exceeds the size of the Reports listing area** of the page, the following navigation bar will appear at the bottom of the listing area.
   a. It includes a refresh button that can be used to refresh the data display on the left.
   b. On the right side is a variety of page navigation controls that can be used, including one to display the entire area as a single page.

Refresh | | Display Paged First Previous Page 1 of 13 Next Last Display All

4.2.4.2 Report Dashboard – Reports Listing area

As seen in the example, Reports are listed alphabetically, and information for each includes:

1. Report Title and a Description (if listed)
2. Options – Launch or details
   a. "**Launch**" a report directly from the listing.
   b. "**Details**" for each report will launch a page that provides the report parameters that define the report layout, data files, fields, selection criteria, etc.
      i. If, you have been, granted access to create and modify reports, the details page is where you can perform that maintenance
3. Favorite – Whether it is on your favorite list or not
4. Created by (Author)
5. Date that the report was last executed

Reports Listing					
Search Reports [x]					On selected reports... ∨
Report Title ▲	Options		Favorite	Created By	Last Executed
0809 ISIRs	➡ Launch	📄 Details	☆	Regina Anglin	Never
no description provided					
Applications (Non-Web) of Returning Students Classified Out of State (User Prompted)	➡ Launch	📄 Details	☆	Vincent Castano	Never
Report generating a list of applications (Non-Web) of returning students who were classified out of state and User Input Required.					
Applications (Web) of Returning Students Classified Out of State (User Prompted)	➡ Launch	📄 Details	☆	Vincent Castano	Never
Report generating a list of applications (Web) of returning studeents who were classified out of state and User Input Required.					
Approval Letter (User Prompted)	➡ Launch	📄 Details	☆	Vincent Castano	Never
Creates List for Approval Letter Saved list & requires user input.					
BLJ-High School Students - Active Programs/Educational Goals	➡ Launch	📄 Details	☆	Ben Jenkins	Never
Active programs and edcuational goals for students graduating from high school during a specified time frame.					
BLJ-HighSchoolApplicants	➡ Launch	📄 Details	☆	Ben Jenkins	Never
no description provided					
BLJ-SAT/ACT Info for a given date range	➡ Launch	📄 Details	☆	Ben Jenkins	Never
no description provided					
BLJ-Students With GPA of 3.0 or better	➡ Launch	📄 Details	☆	Ben Jenkins	Never
no description provided					

4.2.5 Reporting Dashboard - Archives

The Reports Home page provides everything you need to manage and execute reports. It also provides a space to manage archives by clicking the "**archives**" tab. Each user has the ability to archive the information output by reports that they run. This is an excellent tool that can be used to monitor data and information based on points in time.

1. In the example on the next page, a report was run, and the information that was output was archived.
2. The user assigned a name to the archive that included the date and time run for reference *(note: the same information is provided by Informer automatically)*
3. The data included in the archives is locked at the time that they are created.

4. You cannot rerun a process to update and archive. You can re-run a report and create a new archive from that output.

5. Archived output can be viewed by clicking the archive title in the listing, as shown below. Once it is visible, it can be exported for use with most desktop software, shared, or deleted.

4.3 Datasource Dashboard

1. All informer users will have access to the reporting home page, and will see this navigation bar; however, the Mappings tab on the right side of the bar will only be visible to those users who have been granted access to view the information that defines a particular Datasource.

2. If you have access to the Mappings tab, clicking it will display a Datasources home page.
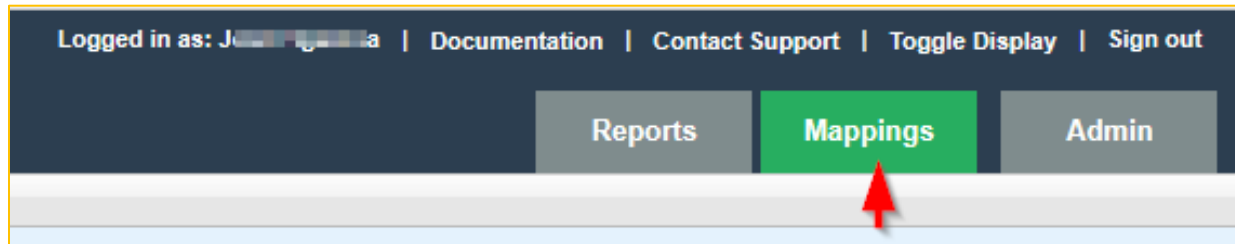
3. The Datasources Home or Datasource Dashboard is used to identify what data is available to you for use with queries that you develop and execute.
   a. All data used by Informer for reporting purposes is actually stored in the Database component of the Datatel System.
      i. There are over 3000 files or tables available in the database, but only a small percentage of them are actually used for reporting purposes.
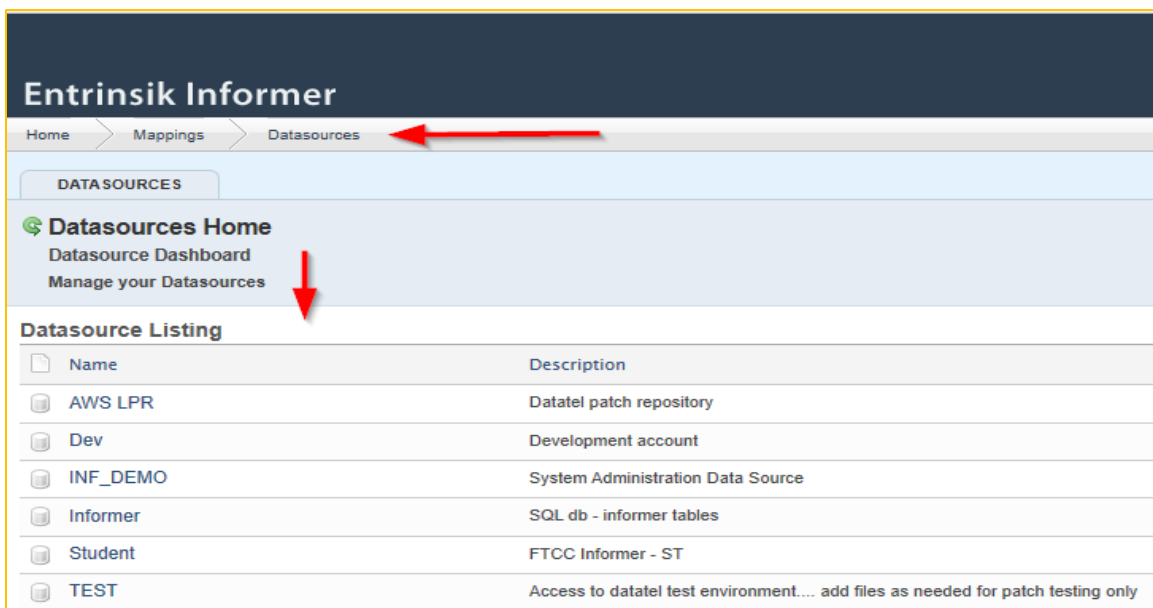
4.3.1 Datasource Dashboard – Colleague UI Database

1. The Colleague UI Software and associated data are divided into specific applications and modules.
    a. **ST** (Student)
    b. **CF** (Financials)
    c. **HR** (Human Resources and Payroll)
    d. **CORE** (Global data shared by all applications).
    e. **UT** (handles system utilities, tools for data management, reporting configurations, and administrative functions such as file maintenance, validation codes, and batch processing setups)
2. The college has identified Data owners and custodians for each of the Colleague UI applications, and all access must be authorized by those owners.
3. Because Informer utilizes that same data, the ownership responsibilities apply to this process as well.
    a. To support this, the ITS department created two lists of files:
        i. those required to satisfy the reporting needs of financial users
        ii. those required to satisfy the reporting needs of Student Records, Course Management, and Academic Programs users.
    b. Once those lists were compiled, they were used to build two Datasources in the Informer system.
        i. "**Bus and Finance**" and "**Student**".
            1. Each time a new user is granted access to the Informer server, their account will specify which Data source they are authorized to use based on input provided by their supervisor and the owners of the data.
            2. Granting access to use a Data source does not provide that user with access to the data source's home page.
            3. Currently, the college is using two Datasources; however, ITS can develop as many as required. For instance, if Informer is deployed to the Faculty, a Datasource that includes only the names of files and fields that the faculty is allowed to access could be created.

4.3.2 Datasouce Dashboard - Overview

1. When on the "mappings" tab, the Datasource Dashboard will display and identify the Datasource name(s) available to you in the Datasource listing area of the form.
    a. In the example on the next page, the user has been authorized to use the Datasource Listed, which is a collection of files, fields, and links from the Colleague UI.
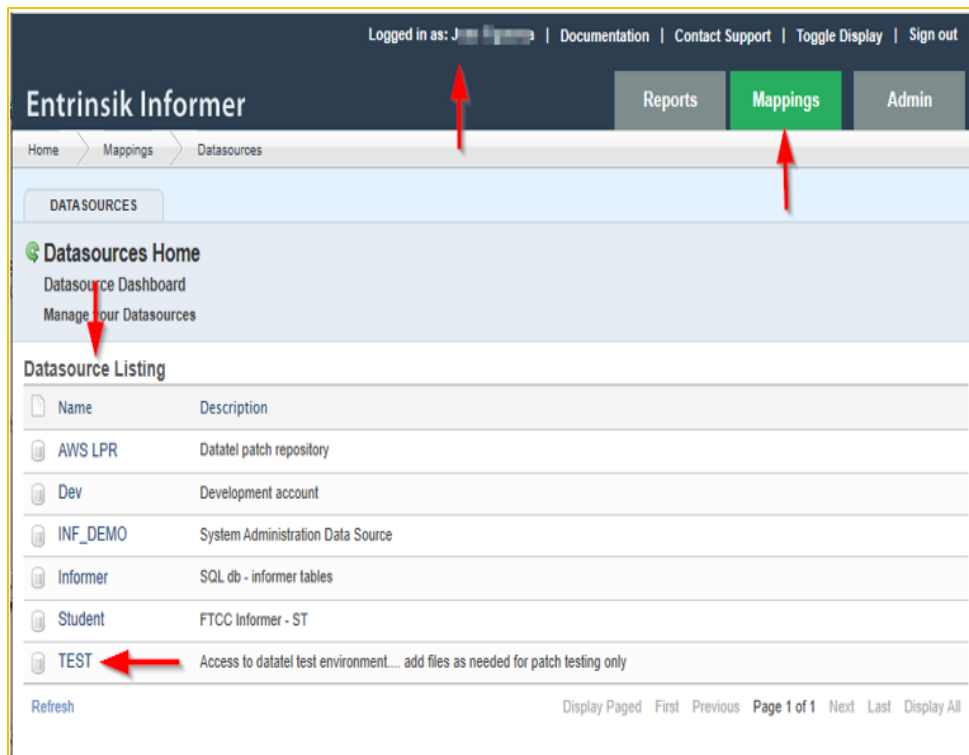
b. To retrieve information about the files in a Datasource, simply click its name from the Datasource listing.

c. After clicking the "**TEST**" Datasource shown in the example above, the following page displays.

d. Click the "**Overview**" tab to see the specific details of the Datasource.
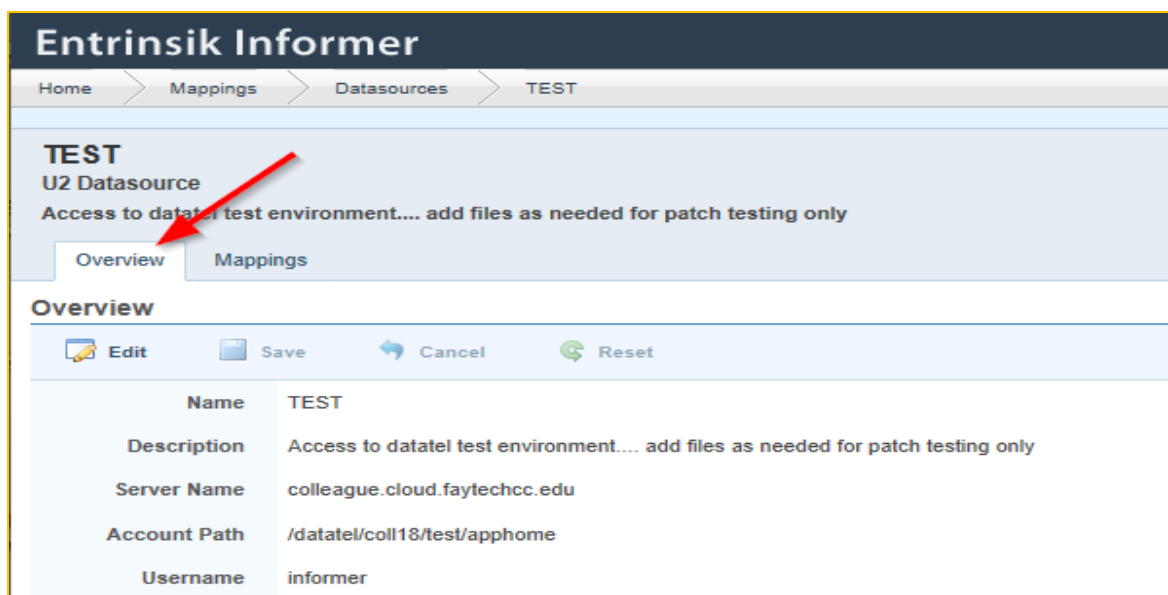
2. Go back to the "**Mappings tab"** to see other specific details about the files that are available through this Datasource. To view the field details or properties and links to other files, simply click the filename on the list.

3. Click to open the "**CC.CODES**" file in the U2 Datasource file Mapping. The "**Overview tab**" provides limited naming information.

4. The "**Properties tab**" provides the detailed field information from the dictionary of the file in the Colleague UI System.
   a. Keep in mind that dictionaries are subject to change as a result of enhancements from Ellucian Colleague UI, the North Carolina Community College System Office, and the college's local programming Department.

5. The field or properties presented for each field of the selected file include the field name, dictionary name, attribute, data type, dictionary record type, and a flag indicating whether it is multivalued or not.


6. The "**Links tab**" will provide information about the Links that may have been created to link this file to another file using one of the fields displayed in the properties.

4.4 Creating, Maintaining, and Launching Reports

1. All of the information provided to this point has described how to navigate the Informer environment, locate and organize existing reports and archives, and analyze Datasources that have been made available to you.

2. This section of this document will provide an overview of how to create, maintain, and launch reports.

   a. Again, the assumption made in the preparation of this document is that you are familiar with where and how the data is stored based on your previous experience with older versions of Informer and Query Builder.

   b. As previously described, all of the reports that you have access to will be listed in the Reports Listing on your reporting home page. "Reports that you have access to" includes those reports that you created and those that others have created and shared with you.

3. As mentioned earlier, reports can be launched directly from the Reports listing or opened to review and maintain the report parameters. This is also the starting point for creating new reports, and the process is initiated by clicking the icon labeled "**New Report**" as shown in the example below.
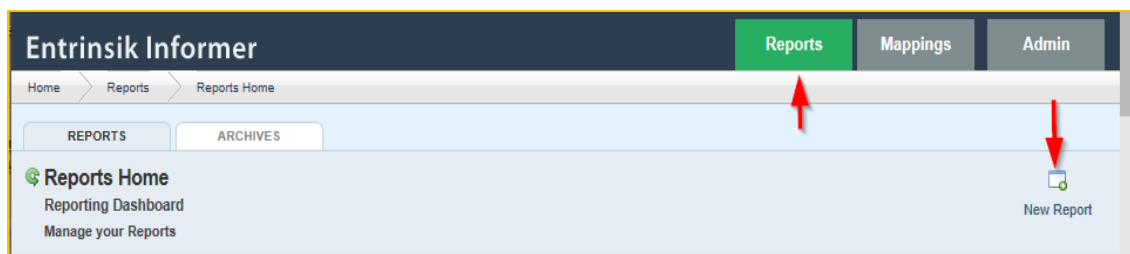
4. The first step in creating a report is to provide a **Name** and **description** of the report, and to identify what **data source** and file **mapping** will be used by the report. You can also assign a tag that can be used to organize or classify the report.

   a. **Report Name**: Enter a name that will provide enough information to describe what the report is to be used for.

      i. A recommended naming convention is to always begin a report name with your initials to avoid confusion with reports created by others who may have a similar name

   b. **Mapping:** Select a Datasource from the dropdown box and then enter the name of the file

      i. Alternatively, you can map in the Datasource that you wish to use (if you know the name of the file) by entering it in the space provided.

   c. **Description:** Assign an existing tag(s) or create a new tag and assign it to the report as a Classification.

d. **Tags:** They are used for organizing and filtering. As you enter the name of the tag to assign, Informer will automatically display the names of existing tags that can be selected.

4.5 Version History

Version	Version Date	Author	Reason / Comments
1.0	8/1/2021	J. Figueroa	Document origination
2.0	11/6/2025	L. Clark	Document updates, reformatting, font, and branding
3.0	Click or tap to enter a date.		
4.0	Click or tap to enter a date.		
5.0	Click or tap to enter a date.		