

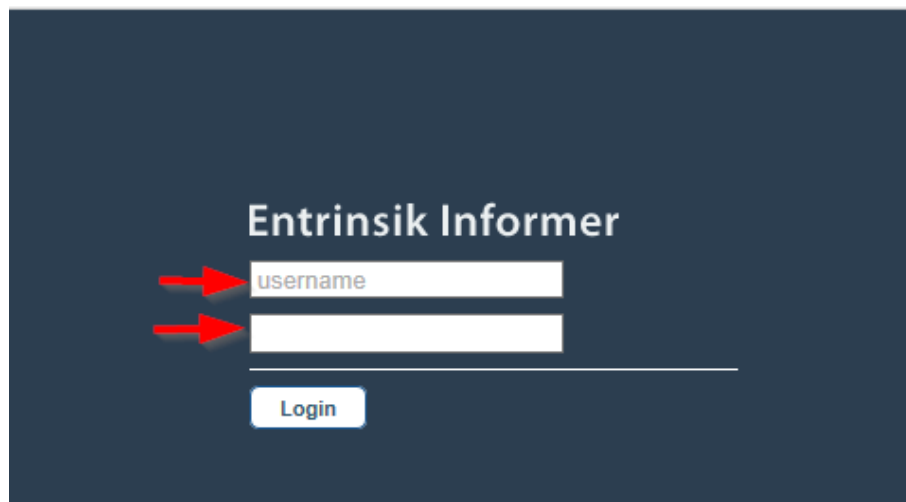
Welcome To Informer 4.7

August 2021

The intent of this document is to provide a general overview of the Informer 4 User Interface to include Basic function usage, page navigation, as well as Creating, Maintaining and Launching Reports. 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 at describing the data files and processes that makeup the Colleague UI application.

Informer 4.7 can be accessed using Google Chrome, Firefox, Microsoft Edge or Internet Explorer browsers. The website is https://informer.cloud.faytechcc.edu/informer/?locale=en_US

1. To login into Informer using your AD credentials.



NOTE: Allowing another user to access college IT resources using your login password is in Violation of college operating procedures.

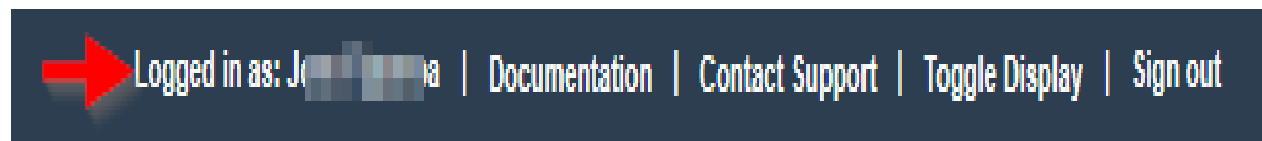
This page is referred to as the “**Reporting Dashboard**” and will serve as your home page when you log in. The general appearance of this page will be the same for each user; however, the specific content will be specific to the access rights granted to the user logging in. This home page is where you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

The screenshot displays the Entrinsik Informer Reporting Dashboard. At the top, a dark navigation bar shows the user is logged in as 'J...', with links for 'Documentation', 'Contact Support', 'Toggle Display', and 'Sign out'. Below this, the 'Reports' tab is active, and the page title is 'Entrinsik Informer'. The main content area is titled 'Reports Home' and includes a 'New Report' button. On the left, a 'Filter Reports' sidebar shows 208 total reports, categorized into 'My Favorites', 'Datasources', and 'Tags'. The 'Reports Listing' table on the right contains the following data:

Report Title	Options	Favorite	Created by	Last Executed
<input type="checkbox"/> 1 LH HR EMPTIME.DTL MO SL VL Copy EMPTIME DTL	Launch	Details ☆	Linda Harrell	Never
<input type="checkbox"/> ACADVP	Launch	Details ☆	Informer Administrator	Never
<input type="checkbox"/> Addendum ACADVP	Launch	Details ☆	Informer Administrator	Never
<input type="checkbox"/> ADDRESS, PHONE, E-MAIL -Courtney W&F Copy ATTACH ADDRESSES TO A SAVED LIST	Launch	Details ☆	Charles Smith	Never
<input type="checkbox"/> AJ--Advisor Assignments for Program Approvals and Special Credit	Launch	Details ☆	Melissa Jones	Never
<input type="checkbox"/> ALPHA LIST OF REPORTS	Launch	Details ☆	System Administrator	Never
<input type="checkbox"/> AMSC All By School HSC pending all enrollment courses from AMSC.	Launch	Details ☆	Mary Schmid	Never
<input type="checkbox"/> AMSC Fall HSC pending FA enrollment courses from AMSC.	Launch	Details ☆	Mary Schmid	Never
<input type="checkbox"/> AMSC Spring HSC pending SP enrollment courses from AMSC.	Launch	Details ☆	Mary Schmid	Never

Components of the Entrinsik Informer Dashboard

Regardless of the access specifics assigned to you, the page displayed will always include a menu bar similar to the one shown below.



The menu bar identifies the name of the individual that is logged in. It also includes links that can be used to change your password, connect to the Entrinsik documentation site, contact the

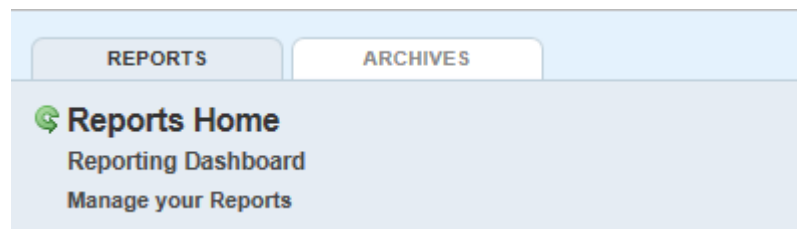
FTCC help desk via email, toggle the display of fields using either their assigned field names or column headers (more information on this later), and sign out.

The home page will also include a Navigation bar similar to the one shown below.



This bar reminds you of where you are relative to your home page. In this example, the current page is Home>Reports>Reports Home as shown in the grey section of the bar on the left. The Reports tab on the right side of the bar highlighted in green, means that it is the current tab selected. The mappings tab it is only visible when granted access to view the data mappings available for reporting in Informer.



If you have access to the Mappings tab, you can use it to navigate to a Datasources Home page with access to all the descriptive information about the Data that you authorized. The Datasources home page is, described later in this document. As you navigate from the home page to reports and archives, Informer will update the bar so that it always indicates where you are relative to the home page. The navigate bar is also “**clickable**” and can be used to navigate back to a previous point. Below the navigation bar, you will find a set of tabs similar to the one shown below.



These tabs are, used to navigate the two main sections of your home page. If the “**REPORTS**” tab is, selected as shown above, the description shown below the tab will be Reports Home, and the lower section of the page will be limited to your reports. When the Archives tab is, selected the description shown below the tab will change to Data Archives Home, and the content of the lower section of the form will only include information about archives (output from previous report launches) that you have created.

The “**Archives**” will be discuss after the Reports section. When the Reports tab is selected, the contents of the lower section of the page describes all of the reports that you have access to, and filter tools that can be used to help organize and retrieve your reports. The term “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, meaning that you will have reports available to you when you log in that you did not create. The filtering tools can be used

to help keep your reports organized by favorites, tags or departments, data sources, or some sort of user criteria that you create (such as “My Monday Reports”) to organize your reports. The Filter Reports panel shown on the next page will be similar to what will appear on every user’s home page. It works in conjunction with the Reports Listing section of the 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.

Filter Reports	
 By Set	
▶ All Sets	281
My Favorites	2
 By Datasource	
▶ All Datasources	281
Student	281
 By Tag	
▶ All Tags	281
Admissions	27
BLJ	25
COHORT Reports	4
College Connections	12
Counselors	8
Curriculum Academic	2
Curriculum Registrar	13
Dean of Enrollment Manage...	25
Evelyn Bryant	10
Faculty	3

The By Set Filter can be used to limit the Reports listed to only those that you have flagged as favorites, otherwise all reports will be listed. In this example, if My Favorites is clicked, only those two reports will be listed.

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

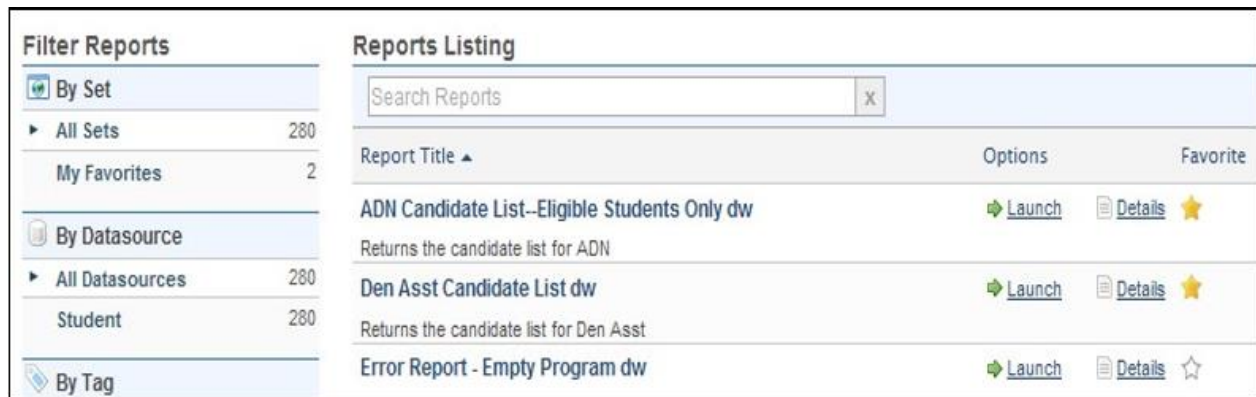
Filtering by Tag provides the most benefit when trying to organize, manage and retrieve reports. Tags are assigned to reports when they are created. They can also be assigned and removed from existing reports. Tags can be used to organize reports into groups, such as reports developed by or for the Admissions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

As shown above, the Filter Reports panel allows you to determine what is listed in the Reports Listing section of the page. Reports can be filtered by Set, Datasource, or Tags.

Filtering by Set lets you choose whether you want to list all reports accessible by you or only those that you have flagged as favorites. To flag a report as a favorite, simply click the Star symbol shown under the favorite column in the report listing area of the page. The Icon will turn yellow and the My Favorites tab in the panel will be incremented by 1. To remove a report

from favorites, simply click the icon again and it will return to its original state. In the example below, two of the reports shown have been selected as favorites.

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.



The screenshot displays the 'Filter Reports' panel on the left and the 'Reports Listing' panel on the right. The 'Filter Reports' panel has three sections: 'By Set' with 'All Sets' (280) and 'My Favorites' (2); 'By Datasource' with 'All Datasources' (280) and 'Student' (280); and 'By Tag'. The 'Reports Listing' panel features a search bar and a table of reports. The table has columns for 'Report Title', 'Options', and 'Favorite'. Three reports are listed: 'ADN Candidate List--Eligible Students Only dw', 'Den Asst Candidate List dw', and 'Error Report - Empty Program dw'. The first two reports have a star icon in the 'Favorite' column, indicating they are favorites.

Report Title	Options	Favorite
ADN Candidate List--Eligible Students Only dw Returns the candidate list for ADN	Launch Details	★
Den Asst Candidate List dw Returns the candidate list for Den Asst	Launch Details	★
Error Report - Empty Program dw	Launch Details	☆

Filtering by Datasource lets you choose whether to limit the report listing to only those reports that use the selected Datasource. In most cases you will only have one Datasource listed, rendering this filter ineffective.

Filtering by Tag provides the most benefit when trying to organize, manage and retrieve queries. Tags are assigned to reports when they are created. They can also be assigned and removed from existing reports. Tags are used to organize reports into groups, such as reports developed by or for the Admissions or Counseling departments, as seen in the example above. If the Admissions tag is clicked on the Filters panel, all reports tagged as Admissions that you are authorized to see will be listed. There are a couple of things that need to be considered when creating and assigning tags.

- Tags are not private. If a user creates a Tag to classify or organize a group of reports, that tag is available for use by all Informer users. 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. If you delete all your reports from a tag, the tag will no longer appear in your panel when you log in. You cannot delete a tag.
- 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.

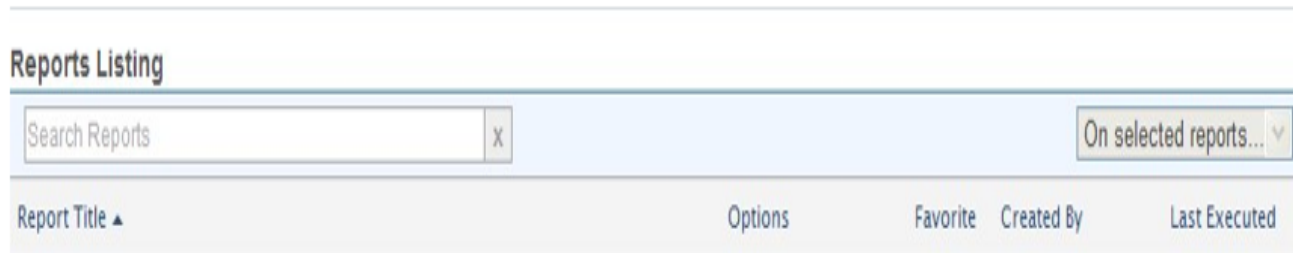
- If you create a report and do not assign a tag, a new tag named (empty) will appear in the By Tag filter panel, along with a total indicating how many reports there are that do not have a tag.
- Tags are one dimensional. You cannot create sub tags under existing tags.
- A report can have more than one tag assigned to it.

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. If you assign 5 tags to a query, that queries name will appear when clicking each of those tags, however there is only one copy of the report. 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 sharing it.

Every user's home page will include a Reports Listing panel similar to the one shown below.

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

The items listed in the panel will be determined by the user's access rights and the filter selections. At the top of the Reports listing panel is a header bar similar to the bar shown below:



On the right side of the header bar is a tool that can be used to search all report titles for a text string that you input in the textbox. It will not search the report descriptions for the string. This can be a time saving feature if you have access to a lot of reports.

On the right side of the header bar is a box that contains the text "On Selected Reports". If it is grayed out as shown in the example, it is disabled. This box 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. Selecting reports is a little tricky. Always select a report by clicking in the white space beside the report title. If you click the report title itself, it displays the report details instead of selecting it. You can select multiple reports using the control / click or shift / click combinations that you typically use in Windows applications.

The header bar can also be used to sort the contents of the Reports Listing. The items can be sorted by ascending or descending Report Title by clicking the Report Title Column heading.

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. It includes a refresh button that can be used to refresh the data display on the left. 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.



The Reports Listing

The focal point of the Reporting Dashboard is the Reports Listing, as shown below.

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

Its contents will be limited to only those reports that you are authorized to use (reports created by you or shared with you), and will be based on the results of your filter settings and search criteria if selected.

As seen in the example above, Reports are listed alphabetically, and information for each includes the title, description, author, and the date that the report was last executed. There is also an option to “**Launch**” a report directly from the listing. The Details link for each report will launch a page that provides the report parameters that define the report layout, data files, fields, selection criteria, etc. If, you have been, granted access to create and modify reports, the details page is where you can perform that maintenance. The Details page is covered in detailed later in this document in the section that describes creating reports.

Archiving

The Reports Home page provides everything you need to manage and execute reports. It also provides a space to manage archives by clicking the archive tab, as shown on the next page. 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. In the example on the next page, a report was run and the information that was output was archived. The user assigned a name to the archive that included the date and time run for reference, however the same information is provided by Informer. The data included in the archives is locked at the time that they are created. You cannot rerun a process to update and archive. You can re-run a report and create a new archive from that output.

REPORTS ARCHIVES

Data Archives Home

Data Archive Dashboard
View your data archives

Filter Archives

By Datasource

- All Datasources 1
- Student 1

By Tag

- All Tags 1
- SYSTEM ADMIN USER TESTS 1

Archives Listing

Search Archives x On selected archives... ▾

Archive Title ▲	Date Created	Created by	Record Count	Size
Program Listing July 6 9:50am run	7/6/11 9:49 AM	Terry Plummerst	536	85 KB





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

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.

Home > Reports > Program Listing July 6 9:50am run

Program Listing July 6 9:50am run

Archived Dataset
Created by Terry Plummerst Jul 6, 2011 9:49:26 AM

 Permissions Change Owner Export Delete

Data Analytics Charting

Report Results

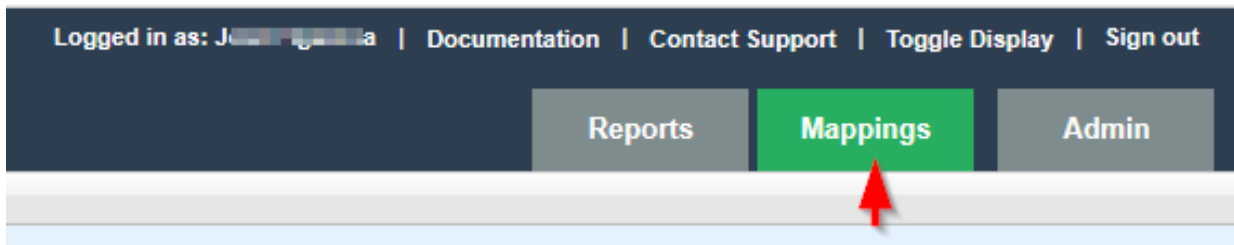
Clear Filter |

ACAD.PROGRAMS	Title	Acad Level
A10100	Associate in Arts	CU
A10100FS	Elem Ed, Mid Grades Ed & Spec Ed	CU
A1010B	Pre-Major Business Administration	CU
A1010C	Pre-Major Business Education and Marketing	CU

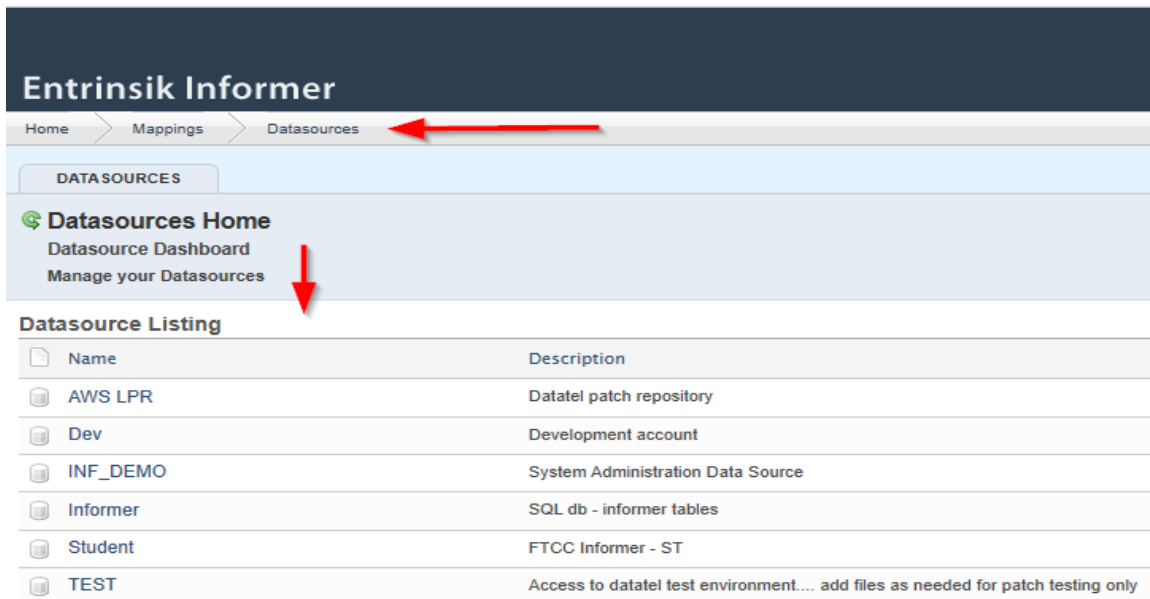
The Datasource Dashboard

As described earlier, 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 that have been granted access to view the information that defines a particular Datasource.

If you have access to the Mappings tab, clicking it will display a Datasources home page. The navigation bar contents will reflect where you are relative to that home page.



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. All data used by Informer for reporting purposes is actually stored in the Database component of the Datatel System. Although there are over 3000 files or tables available in that database, only a small percentage of them are actually used for reporting purposes.



The Colleague UI Software and associated data is divided into specific applications and modules. Those applications are **ST** (Student), **CF** (Financials), **HR** (Human Resources and Payroll), and **CORE** (Global data shared by all applications). The college has identified Data owners and custodians for each of the Colleague UI applications, and all access must be authorized by those owners. Because Informer utilizes that same data, the ownership responsibilities apply to this process as well. To support this, the MIS department created two lists of files; those required to satisfy the reporting needs of financial users and those required to satisfy the reporting needs of Student Records, Course Management, and Academic Programs users. Once those lists were compiled, they were used to build two Datasources in the Informer system.

They are “**Bus and Finance**” and “**Student**”. Each time a new user is granted access to the Informer server, their account will specify which Datasource they are authorized to use based on input provided by their supervisor and the owners of the data. Granting access to use a Datasource does not provide that user with access to the Datasources home page. Currently, the college is using two Datasources; however we can develop as many as required. For instance, if Informer is deployed to Faculty, a Datasource that includes only the names of files and fields that the faculty is allowed to access could be created.

To make the Datasources dashboard page viewable, click the Mappings tab on the upper right side of the Informer home page. The tab background will turn to green when selected, as shown in the example on the next page.

The Datasource Dashboard will display, and identify the Datasource name(s) available to you in the Datasource listing area of the form. In the example below, the user has been authorized to use the Datasource Listed, which is a collection of files, fields and links from the Colleague UI.

Logged in as: J [user] | Documentation | Contact Support | Toggle Display | Sign out

Entrinsik Informer

Home > Mappings > Datasources

DATA SOURCES

Datasources Home

- Datasource Dashboard
- Manage your Datasources

Datasource Listing

Name	Description
AWS LPR	Datatel patch repository
Dev	Development account
INF_DEMO	System Administration Data Source
Informer	SQL db - informer tables
Student	FTCC Informer - ST
TEST	Access to datatel test environment... add files as needed for patch testing only

Refresh

Display Paged First Previous Page 1 of 1 Next Last Display All

To retrieve information about the files in a Datasource, simply click its name from the Datasource listing. After clicking the “TEST” Datasource shown in the example above, the following page displays. Click the Overview tab, to see the specific details of the Datasource.

The screenshot shows the 'Overview' tab for the 'TEST' Datasource. The breadcrumb navigation is Home > Mappings > Datasources > TEST. The page title is 'TEST U2 Datasource' with a description: 'Access to datatel test environment.... add files as needed for patch testing only'. There are two tabs: 'Overview' (selected) and 'Mappings'. Below the tabs are buttons for 'Edit', 'Save', 'Cancel', and 'Reset'. A table lists the following details:

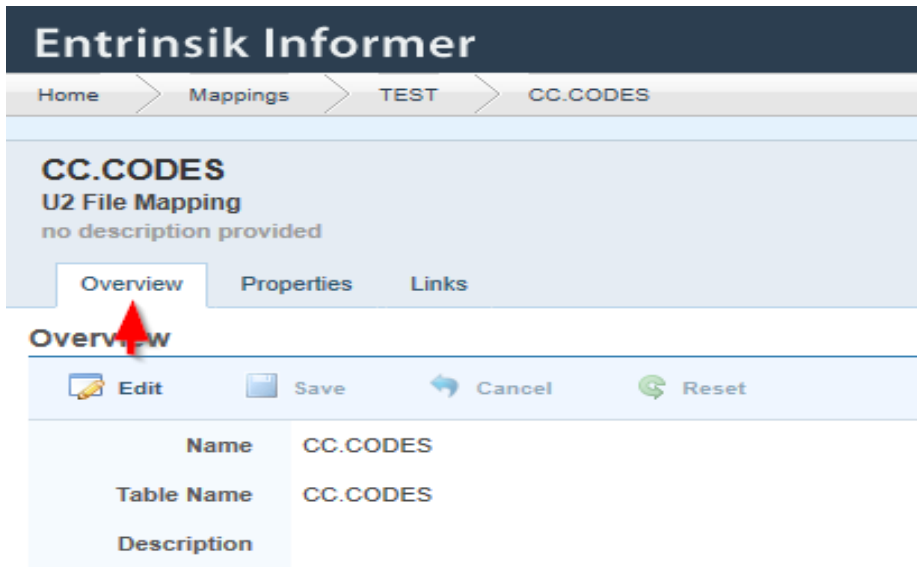
Name	TEST
Description	Access to datatel test environment.... add files as needed for patch testing only
Server Name	colleague.cloud.faytechcc.edu
Account Path	/datatel/coll18/test/apphome
Username	informer

Click the “Mappings tab”, to see the 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.

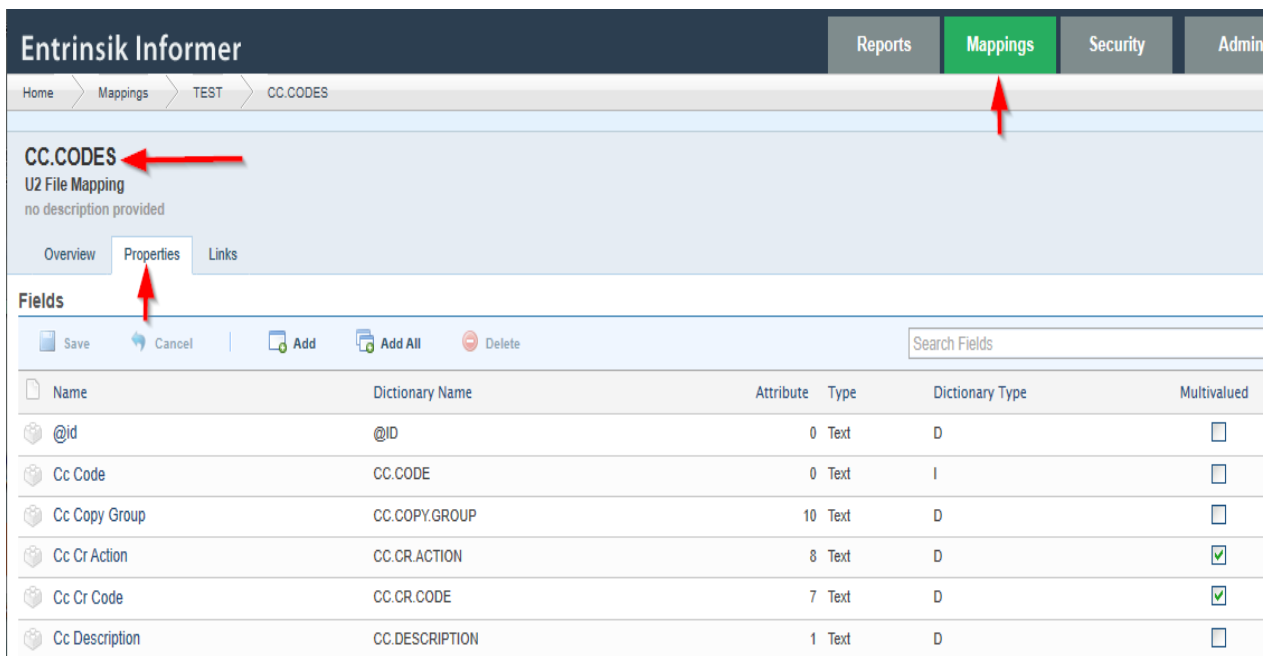
The screenshot shows the 'Mappings' tab for the 'TEST' Datasource. The breadcrumb navigation is Home > Mappings > Datasources > TEST. The page title is 'TEST U2 Datasource' with a description: 'Access to datatel test environment.... add files as needed for patch testing only'. There are two tabs: 'Overview' and 'Mappings' (selected). Below the tabs are buttons for 'Save', 'Cancel', 'Details', 'Add', and 'Delete'. A table lists the mapped files:

Name	Table Name
CC.CODES	CC.CODES
CDSU.RESULTS	CDSU.RESULTS
COURSE.SEC.MEETING	COURSE.SEC.MEETING
COURSE.SECTIONS	COURSE.SECTIONS
F07.INFACCTS	F07.INFACCTS
F07.INFRPTS	F07.INFRPTS
F07.INFRPTS2	F07.INFRPTS2
PERSON	PERSON
SAP.APPEALS	SAP.APPEALS

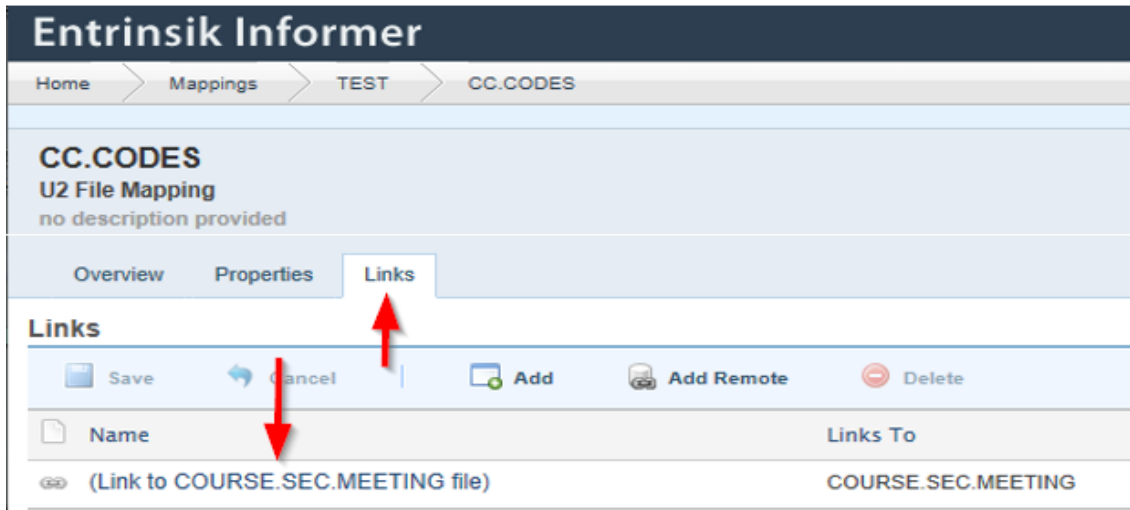
Click to open the “CC.CODES” file in the U2 Datasource file Mapping. The “Overview tab” provides limited naming information.



The “Properties tab” provides the detailed field information from the dictionary of the file in the Colleague UI System. 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. 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.



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.

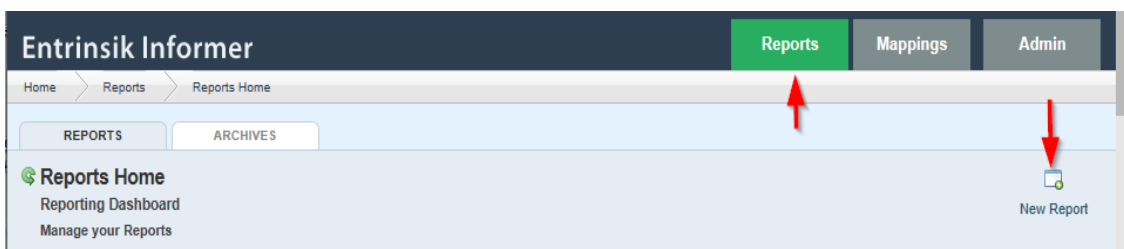


Creating, Maintaining and Launching Reports

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.

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

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.



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, as shown in the sample below. You can also assign a tag that can be, used to organize or classify the report.

Report Name: Enter a name that will provide enough information to describe what the report is To be used for. As a recommended naming convention always, begin a report Name with your initials to avoid confusion with reports created by other users With similar names.

Mapping: Select a Datasource from the dropdown box and then enter the name of the file Alternatively, mapping in the Datasource that you wish to use. If you know the Name of the file simply enter it in the space provided.

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

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. Once the tag name, has been entered in the box, it will be assigned to The report only if the “**Add Tag**”.

The screenshot shows a web form titled "Informer Report" with the subtitle "Use your available mappings to make a report". The form contains the following fields and controls:

- Name ***: A text input field with a red arrow pointing to it from the right.
- Mapping ***: A dropdown menu with "Select a datasource" selected, a red arrow pointing to it from the right, and a secondary input field below it with "Select a mapping" and a "..." button.
- Description**: A large text area with a red arrow pointing to it from the right.
- Tag**: A text input field with "--" and a dropdown arrow, with a red arrow pointing to it from the right.
- Navigation**: A "< Back" button on the left and a "Next" button on the right, with a red arrow pointing to the "Next" button from the left.

Congratulations, you are done!