

User Training Guide



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Chapter 1: Introduction

About Informer

Informer is a web-based reporting utility that provides quick and easy access to data stored in Multivalued or SQL-based databases. The Informer interface is written using modern Web 2.0 technology that allows for drag-and-drop and other functionality used in other cutting-edge web applications. Being web-based, Informer can provide fast and secure access to data anywhere, anytime, with a few clicks of the mouse. Informer also connects SQL and Multivalued databases seamlessly, providing a single point of access to reports across multiple systems.

Logged in as: System Administrator | Documentation | Toggle Display | Sign out

Entrisk Informer

Reports | Mappings | Security | Admin

Home > Reports > Reports Home

REPORTS | ARCHIVES | DASHBOARDS

Reports Home
Reporting Dashboard
Manage your Reports

New Report | Import Package

Filter Reports

Clear Filter

181

My Favorites

2

My Reports

179

Recently Added

1

▼ Datasources

College ERP

37

Informer

24

Northwind

9

Sagitta

33

Sagitta 2 - April Databundle

76

World

2

▼ Tags

(empty)

38

Accounting

37

Accounting

1

Advancement

1

Advising

2

Audit

3

Claims

2

Commercial Lines

30

Commissions

4

Course

8

Demo

12

demo

5

Enrollment

4

File Schema

3

Reports Listing

Search Reports

Report Title	Options	Favorite	Created by	Last Executed
<input type="checkbox"/> Accounting - A/R General Ledger Detail Detailed list of all unposted UTM's. See Sagitta Help Reports -> Report Screens -> A/R General Ledger Detail Report for list of source codes.	Launch Details	☆	System Administrator	8/15/13
<input type="checkbox"/> Accounting - A/R General Ledger Detail Detailed list of all unposted UTM's. See Sagitta Help Reports -> Report Screens -> A/R General Ledger Detail Report for list of source codes.	Launch Details	★	System Administrator	9/9/13
<input type="checkbox"/> Accounting - A/R Subledger Detail Report Detailed listing of all transactions from the Receivables file per accounting period.	Launch Details	☆	System Administrator	Never
<input type="checkbox"/> Accounting - Active Insurers Insurers Listing	Launch Details	☆	System Administrator	8/19/13
<input type="checkbox"/> Accounting - Active Insurers Insurers Listing	Launch Details	☆	System Administrator	8/13/13
<input type="checkbox"/> Accounting - Active Payees Payee Listing	Launch Details	☆	System Administrator	8/5/13
<input type="checkbox"/> Accounting - Active Payees Payee Listing	Launch Details	☆	System Administrator	8/19/13
<input type="checkbox"/> Accounting - Active Vendors Vendor Listing	Launch Details	☆	System Administrator	8/19/13
<input type="checkbox"/> Accounting - Active Vendors Vendor Listing	Launch Details	☆	System Administrator	7/24/13
<input type="checkbox"/> Accounting - Aged Receivables Detailed Aged Receivables Report	Launch Details	☆	System Administrator	10/18/13
<input type="checkbox"/> Accounting - Aged Receivables (Summary)	Launch Details	☆	System Administrator	7/25/13



Chapter 2: The User Interface

In This Chapter

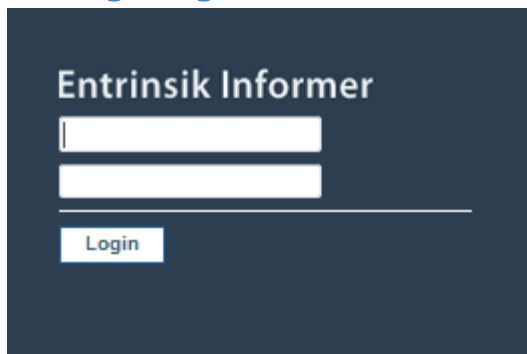
In this chapter, we will:

- Log into Informer
- Review the Main Landing Page

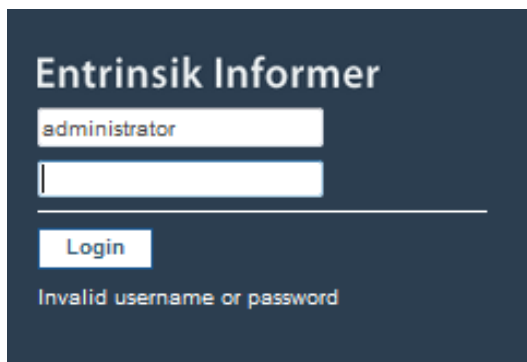
Logging In To Informer

As with most computer applications, Informer requires users to authenticate themselves through the use of a username and password. This combination can either be linked to a network account that is used to access other applications, or it can be a separate username and password just for Informer. Your Informer or system administrator should provide you with the appropriate credentials to log in.

The Login Page



If you key your ID or password incorrectly, you will receive an error message:



Main Landing Page

After logging in, you will be taken to the main landing page. There are four sections on this page: the banner, the navigation bar, the reports listing, and report filters. We will discuss each of these in this section.

The screenshot shows the Entrinsik Informer main landing page. The top banner includes the user name 'System Administrator', links for 'Documentation', 'Toggle Display', and 'Sign out', and navigation tabs for 'Reports', 'Mappings', 'Security', and 'Admin'. Below the banner is a navigation bar with 'Home', 'Reports', and 'Reports Home' links. The main content area is divided into 'Filter Reports' on the left and 'Reports Listing' on the right. The 'Filter Reports' section includes a 'Clear Filter' button and a list of filters categorized by 'Databases' and 'Tags'. The 'Reports Listing' section features a search bar and a table of reports.

Report Title	Options	Favorite	Created by	Last Executed
<input type="checkbox"/> Accounting - A/R General Ledger Detail Detailed list of all unposted UTM's. See Sagitta Help Reports -> Report Screens -> A/R General Ledger Detail Report for list of source codes.	Launch Details	<input type="checkbox"/>	System Administrator	8/15/13
<input type="checkbox"/> Accounting - A/R General Ledger Detail Detailed list of all unposted UTM's. See Sagitta Help Reports -> Report Screens -> A/R General Ledger Detail Report for list of source codes.	Launch Details	<input checked="" type="checkbox"/>	System Administrator	9/9/13
<input type="checkbox"/> Accounting - A/R Subledger Detail Report Detailed listing of all transactions from the Receivables file per accounting period.	Launch Details	<input type="checkbox"/>	System Administrator	Never
<input type="checkbox"/> Accounting - Active Insurers Insurers Listing	Launch Details	<input type="checkbox"/>	System Administrator	8/19/13
<input type="checkbox"/> Accounting - Active Insurers Insurers Listing	Launch Details	<input type="checkbox"/>	System Administrator	8/13/13
<input type="checkbox"/> Accounting - Active Payees Payee Listing	Launch Details	<input type="checkbox"/>	System Administrator	8/5/13
<input type="checkbox"/> Accounting - Active Payees Payee Listing	Launch Details	<input type="checkbox"/>	System Administrator	8/19/13
<input type="checkbox"/> Accounting - Active Vendors Vendor Listing	Launch Details	<input type="checkbox"/>	System Administrator	8/19/13
<input type="checkbox"/> Accounting - Active Vendors Vendor Listing	Launch Details	<input type="checkbox"/>	System Administrator	7/24/13
<input type="checkbox"/> Accounting - Aged Receivables Detailed Aged Receivables Report	Launch Details	<input type="checkbox"/>	System Administrator	10/18/13
<input type="checkbox"/> Accounting - Aged Receivables (Summary)	Launch Details	<input type="checkbox"/>	System Administrator	7/26/13

Banner

The banner at the top of the page allows you to change your password, view the documentation page on the Entrinsik website, and access different sections of Informer. The banner is always visible while in Informer.

The screenshot shows the Entrinsik Informer banner. It includes the user name 'Robin Lamb', links for 'Password', 'Documentation', 'Toggle Display', and 'Sign out', and navigation tabs for 'Reports', 'Mappings', 'Security', and 'Admin'. Callouts point to specific features: 'Change passwords if users are set up locally, and not using LDAP' points to the 'Password' link; 'View documentation' points to the 'Documentation' link; and 'Switch between displaying Informer column names and database names in reports.' points to the 'Toggle Display' link.

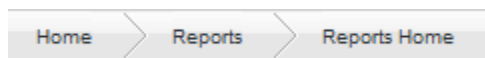
Security can be used to control what users see in the banner. The banner above is what an Informer Administrator would likely see. A regular user might see a banner like this one:



Notice the regular user in this case does not have access to the Mappings, Security, or Admin tabs. This is controlled through user and group security. Security will be covered in the administrative portion of the training.

Navigation Bar

The navigation bar shows the chain of screens that have been accessed. Each screen is a link that can be clicked to quickly go to that screen.



Another term for the links in the navigation bar is "breadcrumbs".

As the user progresses through the screens, the chain is updated. Here the user is viewing the report results for the Tuition Balance by Term report.



Using the links, you can migrate back to the report template for Tuition Balance by Term report, or go back to the Reports Home page.

Report Listing

The report listing shows the reports to which you have access.

Reports Listing					
<div><input type="text" value="Search Reports"/></div>					
Report Title	Options	Favorite	Created by	Last Executed	
<input type="checkbox"/> Accounting - A/R General Ledger Detail <small>Detailed list of all unposted UTM's. See Sagitta Help Reports -> Report Screens -> A/R General Ledger Detail Report for list of source codes.</small>	Launch Details	★	System Administrator	9/9/13	
<input type="checkbox"/> Accounting - A/R General Ledger Detail <small>Detailed list of all unposted UTM's. See Sagitta Help Reports -> Report Screens -> A/R General Ledger Detail Report for list of source codes.</small>	Launch Details	☆	System Administrator	8/15/13	
<input type="checkbox"/> Accounting - A/R Subledger Detail Report <small>Detailed listing of all transactions from the Receivables file per accounting period.</small>	Launch Details	☆	System Administrator	Never	
<input type="checkbox"/> Accounting - Active Insurers <small>Insurers Listing</small>	Launch Details	☆	System Administrator	8/19/13	
<input type="checkbox"/> Accounting - Active Insurers <small>Insurers Listing</small>	Launch Details	☆	System Administrator	8/13/13	
<input type="checkbox"/> Accounting - Active Payees <small>Payee Listing</small>	Launch Details	☆	System Administrator	8/5/13	
<input type="checkbox"/> Accounting - Active Payees <small>Payee Listing</small>	Launch Details	☆	System Administrator	8/19/13	
<input type="checkbox"/> Accounting - Active Vendors <small>Vendor Listing</small>	Launch Details	☆	System Administrator	7/24/13	
<input type="checkbox"/> Accounting - Active Vendors <small>Vendor Listing</small>	Launch Details	☆	System Administrator	8/19/13	
<input type="checkbox"/> Accounting - Aged Receivables	Launch Details	☆	System Administrator	10/18/13	

Clicking on the report title or the Details link takes you to the report template. Clicking Launch will execute the report. The Favorites column shows whether a report has been flagged as a favorite. To flag a report as a favorite, click on the star.

GL Activity Report <small>no description provided</small>	Launch Details	★	Informer Administrator	5/28/10
---	--	---	------------------------	---------

The listing also shows who created the report and the last time the logged in user executed it.

Clicking on the column headers also sorts the reports by that column. For example, clicking on the Favorites column twice will list all of the reports tagged as favorites.

Finding Your Reports

If you know part or all of a report title, you can quickly search for it by typing in the Search Reports box. As you type, Informer will begin to narrow the list of reports to those matching what you have typed.

Reports Listing

x

Report Title	Options	Favorite	Created by	Last Executed
<input type="checkbox"/> Accounting - A/R General Ledger Detail <small>Detailed list of all unposted UTM's. See Sagitta Help Reports -> Report Screens -> A/R General Ledger Detail Report for list of source codes.</small>	Launch Details		System Administrator	9/9/13
<input type="checkbox"/> Accounting - A/R General Ledger Detail <small>Detailed list of all unposted UTM's. See Sagitta Help Reports -> Report Screens -> A/R General Ledger Detail Report for list of source codes.</small>	Launch Details		System Administrator	8/15/13

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

Filter Reports

Clear Filter

181

My Favorites

2

My Reports

179

Recently Added

0

▼ Datasources

College ERP

37

Informer

24

Insurance

76

Northwind

9

Sagitta

33

World

2

▼ Tags

(empty)

38

Accounting

37

Accounting

1

Advancement

1

Advising

2

Audit

3

Claims

2

Commercial Lines

30

Report Filters

Report filters allow a user to narrow down the list of reports shown in the report listing.

base set up by your
ts can pull data

Reports can be filtered by:

- My Favorites, My Reports, or Recently Added
- Datasource: This will show reports using the selected datasource.
- Tag: When reports are created, tags can be added to help organize reports.



Try searching for a report. Use the search and filter options.



Chapter 3: Creating Reports

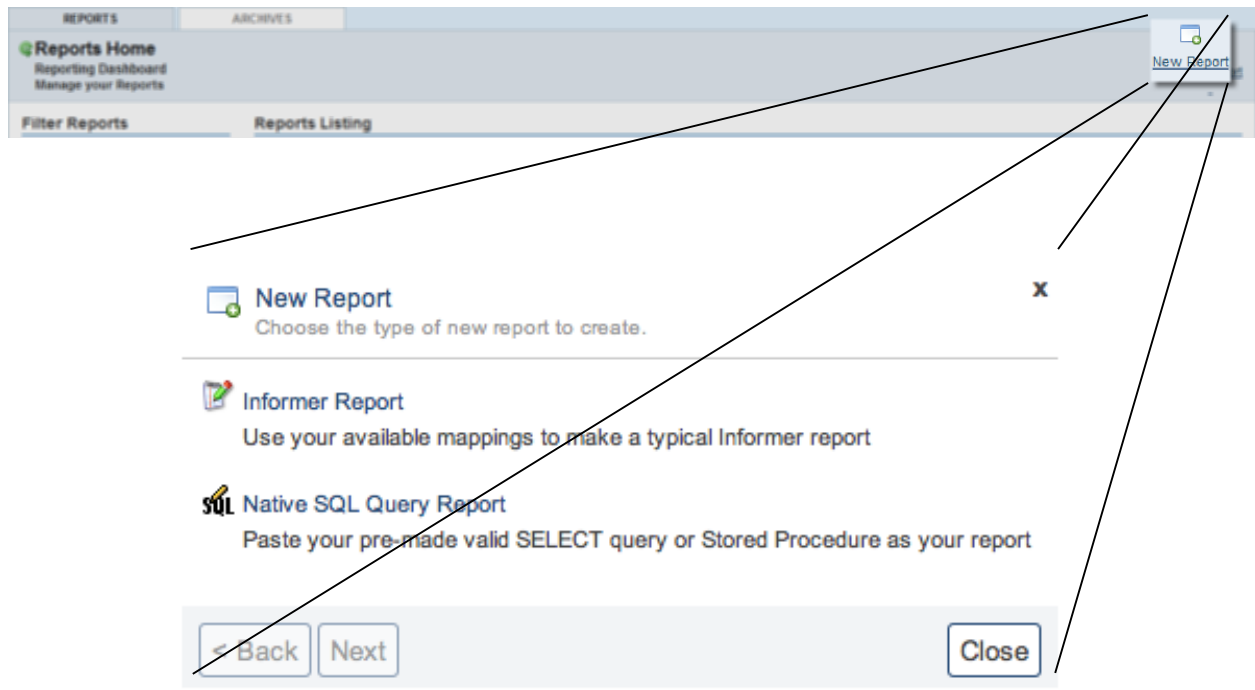
In This Chapter

In this chapter, we will:

- Create a new report

Creating a New Report

To start a new report, click on the New Report icon on the Informer landing page.



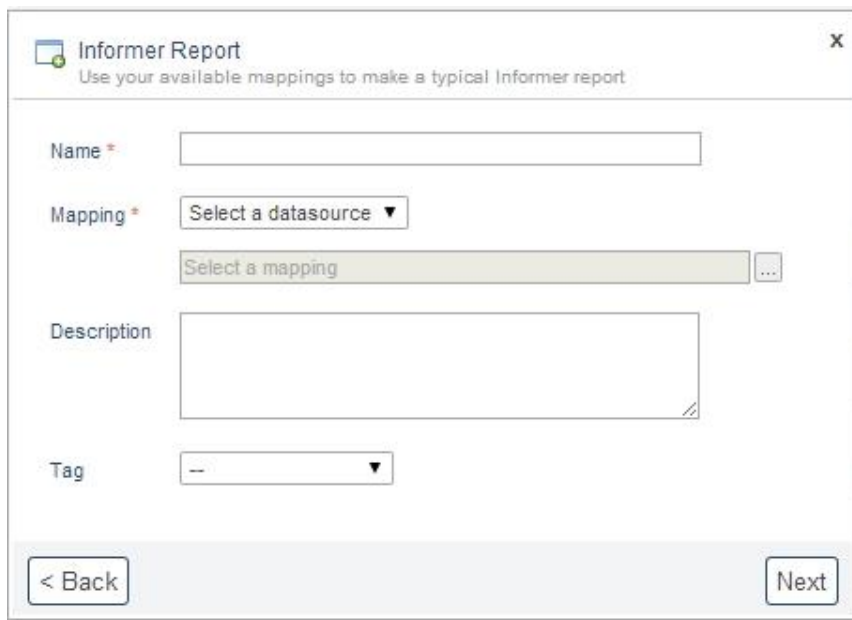
Report Type

Informer allows you to create reports using the standard Informer report builder, or you can simply key-in or copy-and-paste a SQL select statement into Informer to generate the report. To use the Informer report builder, choose Informer report. To use a SQL select statement, choose Native SQL Query Report.

NOTE: If you don't see this popup, it means that you only have permission to create an Informer Report. In that case, it takes you straight to the next screen,.

Informer Report Builder

When you select Informer Report, you will be asked to provide some starting information about your report.



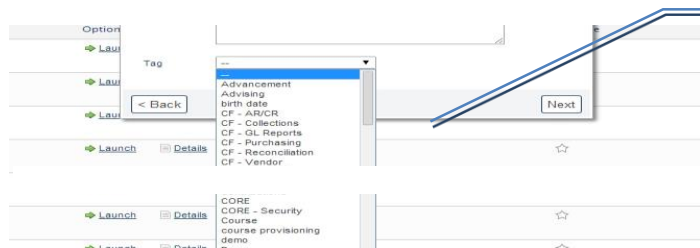
Name (Required): Give the report a brief but descriptive name.

Mapping (Required): Specify the datasource and mapping to be used in the report. Which mapping you choose depends largely on the report you are writing. As a general rule, it is most efficient to choose the file that contains the majority of the data being used on the

report.

Description (Optional): You can enter a detailed description of the report which will show up under the report title in the report listing.

Tags (Optional): Tags provide a means to organize your reports and allow users to filter the reports they see in their report listing. You can enter an existing tag, or you can create a new tag. As you type, Informer will auto-suggest existing tag values based on what you have typed. Select an existing tag, or key a new tag name and click Add Tag.



Informer will only list existing tags. To create a new tag, click the link for tags on the next screen: report template.



Think about a report you would like to create and start a new report. Give the report a name, choose the datasource and mapping for the report. Enter a good description for the report. Finally, add one or more tags to the report.

If you don't add a tag, the report will be filed in the tagged called (empty).

Click the Next button to continue to the Report Details screen.

Report Details

REPORT TEMPLATE








DATA

USER SETTINGS

SCHEDULES

LIVE EXCELS


My Example Report
College ERP (U2) Report

      
Delete Permissions Lock Live Excel Copy Package Tags

Overview

Title	My Example Report
Description	None
Datasource	College ERP (U2)
Mapping	STUDENT COURSE SEC
Select Filter	None
Columns	None
Sorts	None
Groups	None
Normalize	None
PDF Template	System default
Sharing	Private
Limit Result Count	(none)
Tags	None

Owner

 [System Administrator](#)

Created by
System Administrator
Mar 18, 2014

Last modified by
System Administrator
Mar 18, 2014

Formatting Sample

No items listed

The Report Details screen is where you specify the limiting criteria (filters) for the data to be used on the report and define the report layout. You can also manage the tags assigned to the report and specify who has access to the report.

Filters

Filters allow you to place limiting criteria on the data in the table. For example, your report could only list active employees, or you only want students who registered for the fall semester.

A Bit About Logic

Note: if you are familiar with programming logic and conditional statements, you can skip this section.

Most of the time, report criteria is simple. It may be a single condition:

- Birthday equals 10/01/1963
- Last name equals Smith
- Sales greater than or equal to \$1,000.00

Or it can be a combination of conditions:

Birthday equals 10/01/1963 and Last Name equals Smith

Notice the 'and' that joins the conditions. This means that both conditions must be true in order for the entire condition to be true. So, in this example, only people with a last name of Smith who have a birthday on 10/01/1963 would be included.

Change the 'and' to 'or', and it changes the outcome.

Birthday equals 10/01/1963 or Last Name equals Smith

'Or' means that only one of the conditions have to be true in order for the entire condition to be true. So you would get anyone whose birthday is on 10/01/1963, along with everyone whose last name is Smith.

An easier way to think through complex logic is to use truth tables.

AND	True	False
True	True	False
False	False	False

OR	True	False
True	True	True
False	True	False

Let's use our 'and' example first. This is our record:

<u>Birthday</u>	<u>Last Name</u>
10/01/1963	Smith

The table will list our conditions at the top, and then whether the field value meets the condition (True) or not (False).

Birthday = 10/01/1963	and	Last Name = Smith
True		True

Since we used 'and' to join our conditions, and both conditions are True, the entire condition evaluates to True.

Let's now assume our record to be:

<u>Birthday</u>	<u>Last Name</u>
10/01/1963	Jones

Birthday = 10/01/1963	and	Last Name = Smith
True		False

Because one of the conditions is False, the entire condition is False.

Now let's look at the 'or' condition.

<u>Birthday</u>	<u>Last Name</u>
10/01/1963	Smith

Birthday = 10/01/1963	or	Last Name = Smith
True		True

An 'Or' statement requires only one condition to be true in order for the entire condition to be true. So in this example, both of the conditions evaluate to True; therefore, the entire condition is true.

If we change our record again:

<u>Birthday</u>	<u>Last Name</u>
10/01/1963	Jones

Birthday = 10/01/1963	or	Last Name = Smith
True		False

This would still evaluate to be True, because at least one of the conditions is True. In order for the entire condition to be False, both of the conditions would have to be False.

<u>Birthday</u>	<u>Last Name</u>
8/2/1923	Jones

Birthday = 10/01/1963	or	Last Name = Smith
False		False

Because both conditions are false, the entire condition is False.

When using multiple conditions, the left-most condition is evaluated first, the next condition second, and so on. There may be times when combining more than two conditions with 'and' and 'or' you do not get the expected results.

Let's add first name to our database and condition

<u>Birthday</u>	<u>Last Name</u>	<u>First Name</u>
03/31/1980	Smith	John

Birthday = 10/01/1963	and	Last Name = Smith	or	First Name = John
False		True		True

In this example we want anyone with a birthday of 10/01/1963, as well as anyone with the last name of Smith or a first name of John. Evaluating the conditions from left to right, this would result in a True condition, even though the birthday is not 10/01/1963.

To fix this, we could move the 'or' condition to the front so it is evaluated first, but there will be times when you are using a more complex set of conditions and will not necessarily be able to reorder them. It would be better to say that we want to evaluate the 'or' condition first before the 'and' condition without reordering our statement. To do that, we would use parenthetical grouping.

Parenthetical grouping means placing parenthesis around the conditions to force them to be evaluated first. It is the same principle that you learned in algebra where the mathematical operation inside the parenthesis is performed first. So in our example, our condition would be

Birthday = 10/01/1963 and (Last Name = Smith or First Name = John)

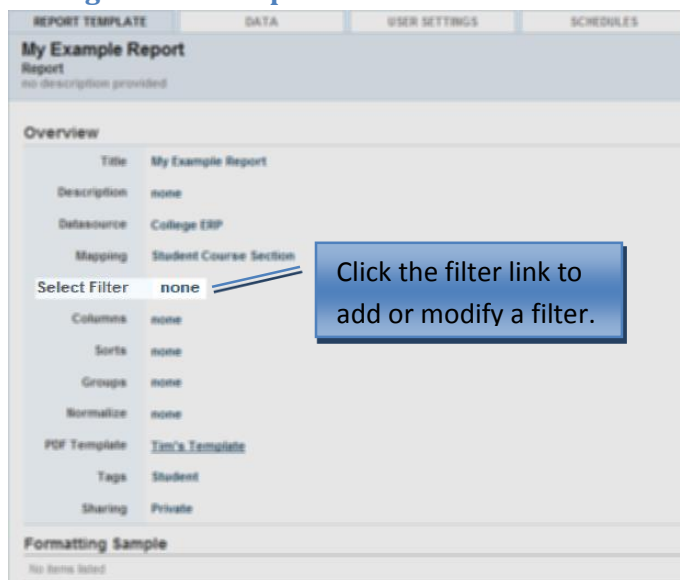
The conditions in the parenthesis would be evaluated first and then that result would be combined with Birthday using 'and'. Given our example above, the entire condition would be False.

False and (True or True)

= False and True

= False

Adding Filters to Reports



From the report overview, click on the filter link. The Edit Criteria screen appears.

Criteria types allow you to specify the kind of criteria you wish to apply. The options vary depending on whether you are using a U2 or SQL datasource, as well as your security settings.

Multi-Value(U2) Database Criteria Types

Edit Criteria

Criteria Types to Add

- Simple Condition
- Compound Condition
- Select / Returning
- TCL/ECL Block
- GET.LIST
- Key List

Select All of the following from Student Course Section:

Drag conditions here

U2 criteria types

Simple Condition: This is a single condition. Example: color = red

Compound Condition: A compound condition is used to start a new parenthetically grouped set of simple conditions.

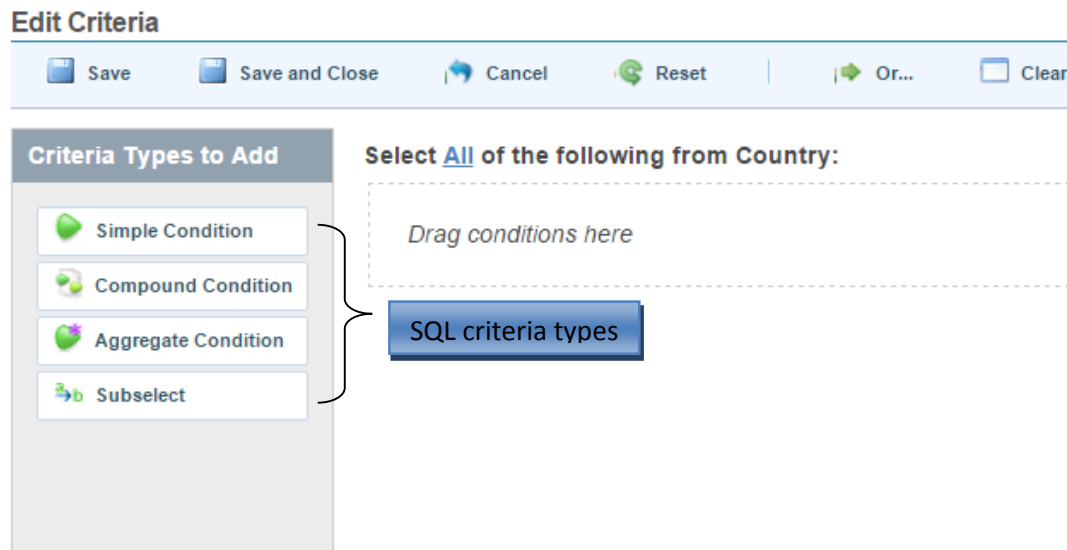
Select/Returning: (U2 only). This option allows you to select items in one file and return the keys to another file.

TCL/ECL Block: (U2 only). This allows you to enter any valid TCL/ECL command that returns a list of keys. Example: SELECT PERSON or GET.LIST MYLIST

GET.LIST: (U2 only). Allows you to retrieve a previously saved list of keys.

Key List: (U2 Only). Allows you to enter the key values. For example, if you were running a list of STUDENTS, you could enter a list of key values for the STUDENTS file.

SQL Database Criteria Types



Simple Condition: This is a single condition. Example: color = red

Compound Condition: A compound condition is used to start a new parenthetically grouped set of simple conditions.

Aggregate Condition: An aggregate condition is a comparison of an aggregate value against some other value. The aggregate value can be a count of records or an aggregation of values of a specific property. The comparison value can be either a literal value, a prompted value, or another property value.

Subselect: Subselects, also known as subqueries, are a very powerful feature of SQL databases. There are three main reasons why you would use a subselect in your Informer report:

- You want to see if a value occurs in a certain dataset.
- You want to see if a value does not occur in a certain dataset.
- You want to compare a value to an aggregate value from a certain dataset.

To add a criteria type to your report, click on the criteria type or click-and-drag the criteria type onto the area marked “Drag conditions here”.

Criteria Types to Add

- Simple Condition
- Compound Condition
- Aggregate Condition
- Subselect

Select **All** of the following from Orders:

New Condition

Property *

Condition
Select a property ▼

Value

- ☒ Literal
- ☐ Prompt
 Enter custom prompt
☐ Require value
- ☐ Property

OK
Cancel

Simple Conditions

A simple condition is a comparison of a field against a value. The value can either be a fixed literal value, or a prompt to enter the value when the person runs the report. It is also possible to choose the value to equal the value of another field.

New Condition

Property *

Condition
Select a property ▼

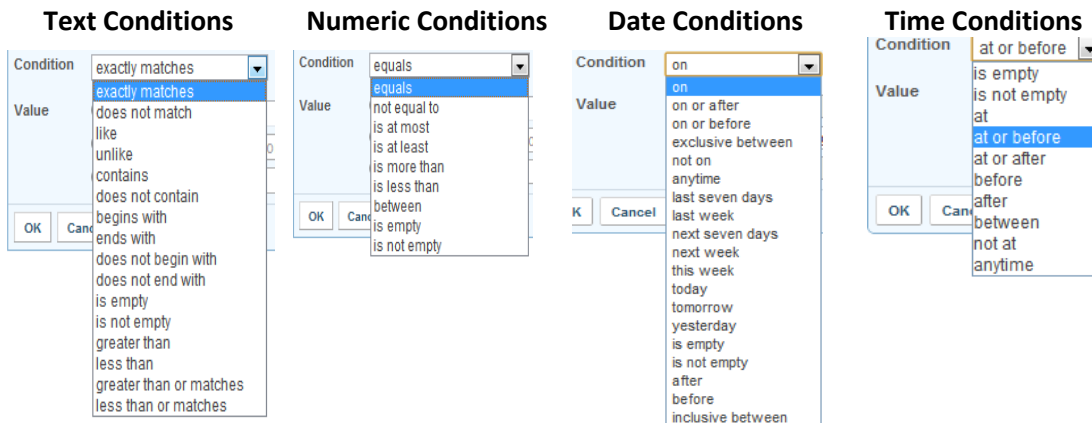
Value

- ☒ Literal
- ☐ Prompt
 Enter custom prompt
☐ Require value
- ☐ Property

OK
Cancel

Property: The field to be used in the comparison. This can be any mapped field in the file used for the report, or in any file to which the primary file is linked.

Condition: Select the appropriate condition operator. Each property type (text, numeric, date, and time) has its own set of condition operators.



Value: The value to which you are comparing the property. Value can be a literal, a prompted value (value entered by the person running the report), or another property.

- **Literal values:** these can either be constant free-text, or you can use special reserved keywords to refer to certain literal values. There are two types of keywords: date-specific and user-specific.

Examples of date-specific keywords are TODAY, WEEK_BEGIN, QTR_BEGIN, YEAR_AGO. For a list of date-specific keywords, see the Appendix in the Informer user guide.

User-specific keywords can be referenced using the syntax {user.keyword}. Examples of user-specific keywords are firstName, lastName, email. You can also create user-defined fields and assign values to individual users. Refer to the Administrative section of this training manual for instructions on how to set up and use user-defined fields.

If the property is a text-type property, a checkbox for “Ignore Case” will be next to the input field for value. Check this box to make the value comparison case insensitive.

The screenshot shows the 'New Condition' dialog box. The 'Property' field is set to 'Ship City'. The 'Condition' dropdown is set to 'exactly matches'. The 'Value' section has three options: 'Literal' (selected), 'Prompt', and 'Property'. The 'Literal' option has a text input field containing 'Boston'. A blue arrow points to the 'Ignore case' checkbox, which is checked. There is also a 'Require value' checkbox which is unchecked. At the bottom are 'OK' and 'Cancel' buttons.

You can also enter a list of values, separated by commas, to compare against. For example, if you wanted multiple cities, you could enter Boston, Chicago. This creates an implied OR condition.



Be careful when using a list of values in a negative condition (does not match, does not contain, etc.). This may cause unexpected results.

New Condition

Property * Ship City

Condition exactly matches

Value

☒ Literal Boston, Chicago

☐ Prompt Enter custom prompt

☐ Property

☐ Require value

☒ Ignore case

OK Cancel

- **Prompt:** the user running the report is asked to provide the value(s) when the report is launched. As with literal values, free-text can be used as well as reserved keywords and value lists. If you want to change the prompt text, enter it in the “Enter custom prompt” field. You can also specify that users are required to provide a value by clicking the checkbox next to “Require value”.

New Condition

Property * Ship City

Condition exactly matches

Value

☐ Literal

☒ Prompt Enter custom prompt

☐ Property

☐ Require value

☒ Ignore case

OK Cancel

- **Property:** used to compare the property against another property. For example, if you to see if you had any customers that were employees, you would compare the customer id to the employee id.

New Condition

Property * Customer ID

Condition exactly matches

Value

☐ Literal

☐ Prompt Enter custom prompt

☒ Property Employee ID

☐ Require value

☒ Ignore case

OK Cancel

Compound Conditions

Compound conditions are parenthetical groupings of simple conditions. Borrowing from our earlier example, we may want a report of based on order date and orders made from Boston or the Northeast Region of the US.

First, choose a simple condition for the order date:

The screenshot shows the 'Criteria Types to Add' panel on the left with four options: Simple Condition, Compound Condition, Aggregate Condition, and Subselect. A blue arrow points from 'Simple Condition' to the 'New Condition' dialog on the right. The dialog has a title bar 'New Condition' and a subtitle 'Select **All** of the following from Order Details:'. It contains the following fields: 'Property' with a dropdown menu showing 'Order Date', 'Condition' with a dropdown menu showing 'inclusive between', and 'Value' with three radio buttons: 'Literal' (selected), 'Prompt', and 'Property'. The 'Literal' option has a text input field with 'start date' and a date picker icon, followed by a minus sign, then 'end date' and another date picker icon, and finally plus and minus icons. The 'Prompt' option has a text input field with 'Enter custom prompt' and a 'Require value' checkbox. The 'Property' option has a text input field. At the bottom are 'OK' and 'Cancel' buttons.

Now add a compound condition.

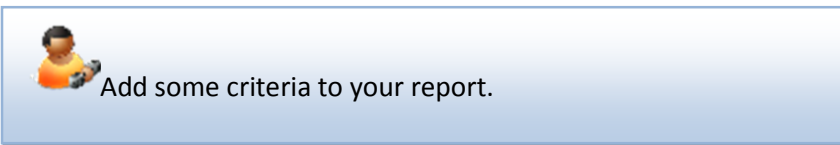
The screenshot shows the 'Criteria Types to Add' panel on the left with four options: Simple Condition, Compound Condition, Aggregate Condition, and Subselect. A blue arrow points from 'Compound Condition' to the 'At least one of' dialog on the right. The dialog has a title bar 'At least one of:' and a subtitle 'Select **All** of the following from Order Details:'. It contains a text input field with 'Orders.Order Date inclusive between ?' and a close icon. Below this is a dashed box with the text 'Drag conditions here'.

This starts a new grouping of simple conditions. To start adding conditions, click on Simple condition. We can now add the condition to filter for a specific city.

The screenshot shows the 'Criteria Types to Add' panel on the left with four options: Simple Condition, Compound Condition, Aggregate Condition, and Subselect. A blue arrow points from 'Simple Condition' to the 'New Condition' dialog on the right. The dialog has a title bar 'New Condition' and a subtitle 'Select **All** of the following from Order Details:'. It contains the following fields: 'Property' with a dropdown menu showing 'Ship City', 'Condition' with a dropdown menu showing 'exactly matches', and 'Value' with three radio buttons: 'Literal' (selected), 'Prompt', and 'Property'. The 'Literal' option has a text input field with 'Boston' and an 'Ignore case' checkbox. The 'Prompt' option has a text input field with 'Enter custom prompt' and a 'Require value' checkbox. The 'Property' option has a text input field. At the bottom are 'OK' and 'Cancel' buttons.

To add another condition, click on Simple Condition.

Notice that Informer defaults the compound conditions to “or”. If we wanted to change the “or” to “and”, simply click on the link “At least one” and choose “All”. Or, to negate the conditions, choose “None”. The same can be done to the outer condition, where Informer defaults to “and”.



Aggregate Conditions

An aggregate condition is a comparison of an aggregate value against some other value. The aggregate value can be a count of records or an aggregation of values of a specific property. The comparison value can be either a literal value, a prompted value, or another property value.

When you click or drag the aggregate condition option the screen will appear as:

Select [All](#) of the following from Country:

Sum of: Country.Population is more than '700000000' x

Aggregate *

Total ▼

of: Population

...

Use Distinct

No ▼

Condition

is more than ▼

Value

☒ Literal

700000000

☐ Prompt

Enter custom prompt

☐ Require value

☐ Property

...

OK

Cancel

Aggregate: The aggregate value to be used. The dropdown list allows you to choose from count, min, max, average or total of a property value.

Use Distinct: The distinct option allows you to aggregate over unique values.

Condition: The operator for the comparison. Each data type (text, numeric, date, and time) has its own applicable set of condition operators.

Value: Enter the value to which you are comparing the against the aggregate column. This value can be either a literal value, a prompted value, or another property value.

(Please see [this](#) article for more explanation on condition types and values.)

The condition functions just as a simple condition except for the selecting an aggregate function. Conditions can be made on count, sum, max, min, and average just like aggregate columns.

It's important to note that, just like aggregate columns, adding an aggregate condition morphs the report into a summary report over the unique rows. When adding your

An example of using this type of condition would be to use a database of country population. We want to find all continents that have a country with a population more than a specific amount.

If we add the Continent, Country and Total Population (you will need to add an Aggregate column of the Total Population) fields as columns in the report, the result set will look like this:

Report Results		
Refresh	<input type="checkbox"/> Clear Filter	Aggregate Options <input type="checkbox"/> Summary Only
Drag columns here to group		<input type="text" value="Search"/>
Continent	Country Code	Population (Total)
Asia	CN	1277558000
Asia	IN	1013662000

It lists Asia twice, because Asia has two countries that have a population over 700,000,000.

There is also an option to choose Use Distinct to only bring back distinct rows of values. The options in the drop down are No, Yes, and Yes and Convert Nulls.

Choosing Yes results in distinct rows based on the columns that are in the output of the report. In this case, if Country code is left in there, the result would be the same because there are two countries that meet that criteria. If the Country Code column is taken out, the result would be all continents that have total populations of over 700,000,000.

Continent	Population (Total)
Asia	3705025700
Europe	730074600
Africa	784475000

The option of Yes and Convert Nulls allows nulls to be in the result set as a row and the user chooses what the null value will be.

Subselect Conditions

Subselects, also known as subqueries, are a very powerful feature of SQL databases. There are three main reasons why you would use a subselect in your Informer report:

You want to see if a value occurs in a certain dataset.

You want to see if a value does not occur in a certain dataset.

You want to compare a value to an aggregate value from a certain dataset.

We will examine each of these scenarios in this article and attempt to provide examples of each.

See if a Value Occurs in a Certain Dataset

Normally you would use simple conditions and links to determine if a value occurs in a dataset; however, there may be times when linking in a condition will cause a one-to-many relationship and, therefore, your report will have more data than you wanted. Using a subselect would prevent the one-to-many relationship and give you the results you desire.

Example: List all products with orders of a quantity of more than 50

Since there is a way to link Orders to Order Details using the Order ID, we could use a simple condition that compares the Quantity from Order Detail. Unfortunately that would return a row for every every order that had a quantity of over 50. We only want the unique list of Order ID's. So, we will use a subselect instead.

Click or drag the subselect box to create a new condition.

Select **All** of the following from Orders:

The screenshot shows a query builder window with the title "Orders.Order ID equals ANY (Select Distinct Order Details.Order ID)". It features two main sections for defining conditions. The top section has a "Column" dropdown with "Property" selected and "Order ID" entered. The "Condition" dropdown is set to "equals" and "ANY". The "Select From" dropdown is set to "Order Details". The bottom section has a "Column" dropdown with "Property" selected and "Order ID" entered, with "Count" selected in the "of:" dropdown. The "Distinct" checkbox is checked, and "Convert Nulls" is unchecked. The "Group by" field is empty. At the bottom, there are "OK" and "Cancel" buttons. Below the main form, a summary bar states "Where **All** of the following from Order Details:" followed by a subselect box containing "Order Details.Quantity is more than '50'".

The report is based on the Product mapping since we want a unique list of orders. The quantity is found in the Order Details table, which also has the order ID. The subselect looks to see if the order ID from Orders exists in the list of order ID's from Order Details with a Quantity of more than 50.

See if a Value Does Not Occur in a Certain Dataset

This is the opposite of the first example.

Example: List all products that did not have any orders of at least a quantity of 50.

The screenshot shows a query builder window with the title "Orders.Order ID not equal to ALL (Select Distinct Order Details.Order ID)". It features two main sections for defining conditions. The top section has a "Column" dropdown with "Property" selected and "Order ID" entered. The "Condition" dropdown is set to "not equal to" and "ALL". The "Select From" dropdown is set to "Order Details". The bottom section has a "Column" dropdown with "Property" selected and "Order ID" entered, with "Count" selected in the "of:" dropdown. The "Distinct" checkbox is checked, and "Convert Nulls" is unchecked. The "Group by" field is empty. At the bottom, there are "OK" and "Cancel" buttons. Below the main form, a summary bar states "Where **All** of the following from Order Details:" followed by a subselect box containing "Order Details.Quantity is more than '50'".

Here we are still selecting a dataset of all the Order ID's from Order Details that have orders with quantities not more than 50. By stating "not equal to" and "ALL" in the condition, we are making sure that the selected Order ID from Orders is not in the dataset from Order Details.

Comparing a Value to an Aggregate Value from the Dataset

Subselects also allow you to compare a value to an aggregate value from the dataset.

Example: List all line items that have quantities that are more than the average quantity of all orders.

In this example, we will compare the quantities of individual orders to the average quantity of all orders. No conditions are needed in this subselect.

The screenshot shows a query builder window titled "Order Details.Quantity is more than ANY (Select Average(Order Details.Quantity))". The main configuration area has the following settings:

- Column:** ☒ Property (Quantity) and ☐ Aggregate (Count of: [empty]).
- Condition:** is more than | ANY.
- Select From:** Order Details.
- Column:** ☐ Property and ☒ Aggregate (Average of: Quantity). A ☐ Distinct checkbox is also present.
- Group by:** [empty] with add (+) and remove (-) buttons.

At the bottom, there are "OK" and "Cancel" buttons. Below them is a section titled "Where All of the following from Order Details:" with a dashed box containing the text "Drag conditions here".

Columns

Now that we have specified the conditions for the report, we need to add data to the report.

From the reports overview page, click the Columns link.

REPORT TEMPLATE	DATA	USER SETTINGS	SCHEDULES
My Example Report Report no description provided			
Overview			
Title	My Example Report		
Description	none		
Datasource	College ERP		
Mapping	Student Course Section		
Select Filter	Course Term exactly matches 'V' and (First Name exactly matches 'John' (ignore case) or		
Columns	none		
Sorts	none		
Groups	none		
Normalize	none		
PDF Template	Tim's Template		
Tags	Student		
Sharing	Private		

The Edit Columns screen appears.

Save and Close

Cancel

Reset

Add Fields

Add Calculations

Add Aggregates

Clear

Refresh Sample

No columns defined

Adds columns to the report.

Adds calculated columns.

Adds aggregate functions (sum, average, etc).

Drop columns here to remove

Column Display Editor

OK

Apply

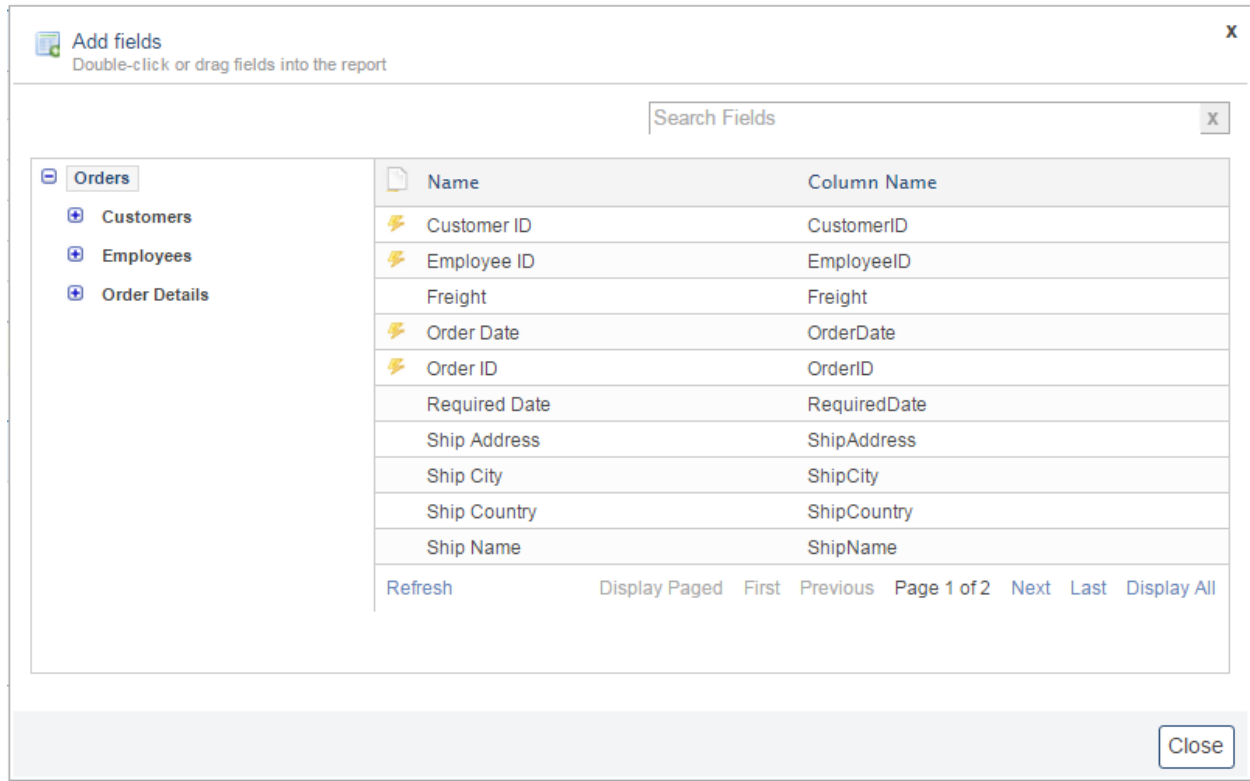
Cancel

Remove

Click a column header above to edit display properties

Adding Fields

Click “Add Fields” to place data columns on the report.



You can then choose any of the fields from the primary file, or from any file to which the primary file is linked.

To add a field to the report, double-click the field name, or drag the field onto the report.











In this example, we have added Company Name, Order ID, Quantity, Unit Price, Sales First Name, Sales Last Name

Edit Columns

Company Name	Order ID	Quantity	Unit Price	Sales First Name	Sales Last Name
Vins et alcools Chevalier	10248	12	14.0000	Steven	Buchanan
Vins et alcools Chevalier	10248	10	9.8000	Steven	Buchanan
Vins et alcools Chevalier	10248	5	34.8000	Steven	Buchanan
Toms Spezialit��ten	10249	9	18.6000	Michael	Suyama
Toms Spezialit��ten	10249	40	42.4000	Michael	Suyama

You can rearrange the order in which the columns are displayed by dragging the column heading to the appropriate slot. In the below example, we have switched Company Name and Order ID by dragging and dropping them into place.

Edit Columns

 Save	 Save and Close	 Cancel	 Reset	 Add Fields	 Add Calculations	 Add Aggregates	 Clear	 Refresh Sample
Order ID	Company Name	Quantity	Unit Price	Sales First Name	Sales Last Name			
10248	Vins et alcools Chevalier	12	14.0000	Steven	Buchanan			
10248	Vins et alcools Chevalier	10	9.8000	Steven	Buchanan			
10248	Vins et alcools Chevalier	5	34.8000	Steven	Buchanan			
10249	Toms Spezialit��ten	9	18.6000	Michael	Suyama			
10249	Toms Spezialit��ten	40	42.4000	Michael	Suyama			
 Drop columns here to remove								

Changing Column Settings

You can change the way a column is displayed by using the Column Display Editor. These changes apply only to the current report. They do not permanently change the settings for the column. Click the column heading to display the column in the editor at the bottom of the screen. The actual name of the first is First Name, but you can change the column header to what you would like the header to be in the final report.

Column Display Editor

OK	Apply	Cancel	Remove
Column Header *	Sales First Name		
Alias	employees_assoc_FirstName		
Property *	First Name		
Alignment	<input checked="" type="radio"/> Left <input type="radio"/> Center <input type="radio"/> Right		
Width	Auto		
Format	<div>Style</div> <div><input type="checkbox"/> B <input type="checkbox"/> I <input type="checkbox"/> U</div> <div>Additional CSS:</div> <div></div>		
Hidden	<input type="checkbox"/>		
Show in row body	<input type="checkbox"/>		
Use Distinct Values	No		

Column Header: Edit this text to change the header displayed above the column on the report.

Alias: This is the name used to reference the field in calculated columns. This should not be changed.

Property: The field or column in the database where the data is pulled.

Alignment: Changes the justification of the data on the report.

Width: Specify how wide the column should be on the report. Options are:

- **Auto** – Bases the width of the column based on the browser size. It does not auto-width the number of characters in the values of the columns.
- **Percent** – The column width will be a percentage of the available space in the browser or the page size (for PDF output).
- **Pixels** – The number of pixels to allocate for the column width.
- **Characters** – The number of characters to allocate for the column width.

Format: Changes the style of the column on the report. You can bold, italicize, or underline the data, as well as add any cascading style sheet (CSS) code to format the data.

Hidden: Removes the column from the report row, but the column is still available for use in sorting or calculated columns.

Show in row body: Displays the data below the report row.

Null Value: Choose whether to keep null values blank or convert them to 0

Use Distinct Values: Allows the list of values to be distinct based on the column setting. Choose No, Yes, or Yes and Convert to Nulls. The default is No.

Example: If set to No, a report of ID's might look like this...

ID STUDENT
10
10
11
12
15

When column is set to Yes, the same list would look like this...

ID STUDENT
10
11
12
15

If the field is numeric, there are additional formatting options available:

The screenshot shows the 'Column Display Editor' dialog box. It has a sidebar on the left with categories: Column Header, Alias, Property, Alignment, Width, Format, Hidden, and Show in row body. The 'Format' category is selected. The main area is divided into two sections: 'Style' and 'Number Format'. The 'Style' section includes icons for text alignment (left, center, right), a text color icon, a background color icon, and a 'Additional CSS' text input field. The 'Number Format' section includes a 'Decimal Places' spinner set to 2, a 'Use 1000 Separator' checkbox that is checked, a 'Currency' dropdown menu set to 'USD \$', and a 'Negative Numbers' dropdown menu set to '(1234.10)'. At the top of the dialog are buttons for 'OK', 'Apply', 'Cancel', and 'Remove'. The 'Column Header' field contains 'Amount Due', the 'Alias' field contains 'AMOUNT_DUE', and the 'Property' field contains 'Amount Due' with a small icon to its right. The 'Alignment' section has radio buttons for 'Left', 'Center', and 'Right', with 'Right' being selected. The 'Width' field is set to 'Auto' with a small icon to its right. The 'Hidden' and 'Show in row body' options are both unchecked.

Decimal Places: Controls the number of decimal places to display.

Use 1000 Separator: Displays the default separator (comma for U.S.).

Currency: Specify the currency symbol to use.

Negative Numbers: Specify how negative numbers are to be displayed.

Dates also have their own formatting options:

Column Display Editor

OK Apply Cancel Remove

Column Header * Start Date

Alias DATE_START

Property * Start Date

Alignment ☒ Left ☐ Center ☐ Right

Width Auto

Format

Style

Additional CSS

Hidden ☐

Show in row body ☐

Date Format

Mar 14, 2012
3/14/12
Mar 14, 2012
March 14, 2012
Wednesday, March 14, 2012
2012-03-14

When finished editing the column, be sure to click Apply or OK.



Add some columns to your report. Try choosing different types (text, numbers, dates, etc.) and change some of the formatting.

Calculated Columns

Informer 4 introduced the ability to create calculated columns. This provides you, the report writer, with the flexibility of performing calculations and advanced functions without involving IT. There are two types of calculated columns: Template and Script.

Template calculated columns are written using simple plain text and/or HTML. They are used to format data or concatenate values together. Column values can be referenced using placeholders, much like a mail merge refers to values in a document. They cannot be used to do calculations (such as addition and subtraction), conditional statements (if something is true do this otherwise do that), and they cannot refer to multi-value fields (U2 only).

Script calculated columns are written using JavaScript. They can do all the things a template can do, in addition to the things it can't, meaning you can do calculations, conditional statements, and refer to multi-value fields.

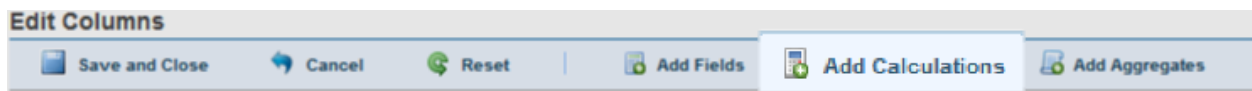
Informer JavaScript vs. "Normal" JavaScript

Normal JavaScript is typically embedded in HTML and is interpreted by the browser. This means that "normal" JavaScript can affect things on the actual HTML document that is rendered. Informer

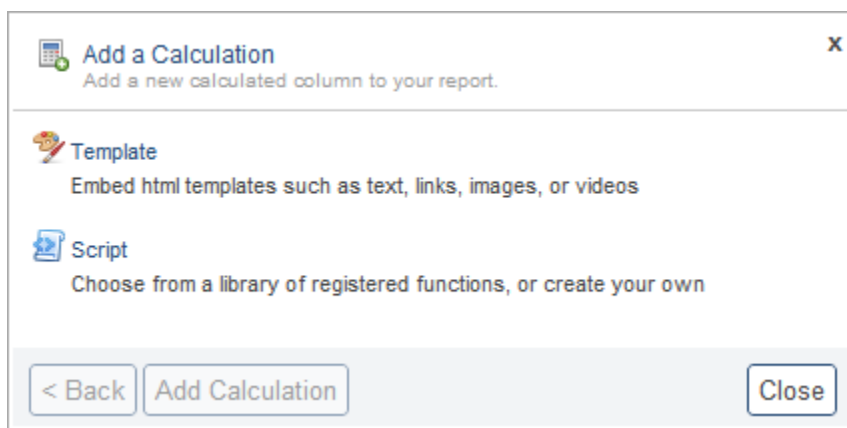
JavaScript is actually embedded within and interpreted by the Informer Java application. Once interpreted, the results are passed to the browser. This means that Informer JavaScript cannot affect the HTML document that is viewed in the browser. It can, however, do everything else that JavaScript can do.

Adding Calculations

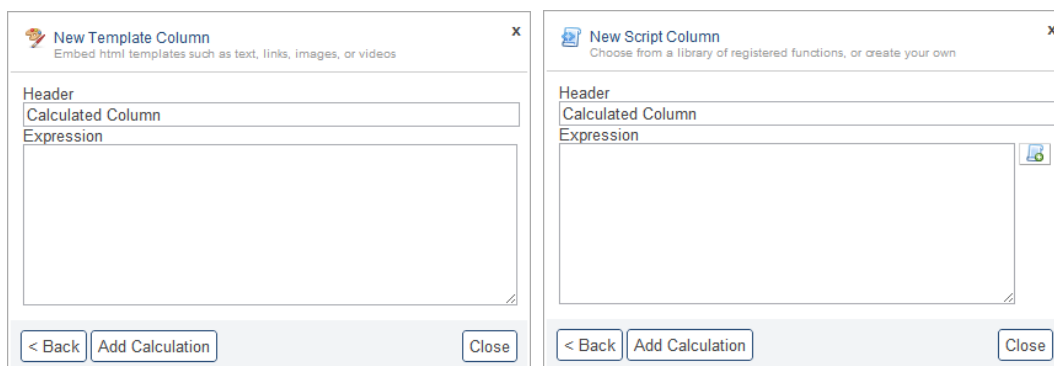
To add a calculated column, click Add Calculations.



Informer will then ask you which type of calculation you wish to create.



Select the appropriate type and create your column in the subsequent window.



Template Expression Window

Script Expression Window

Give the column a name in the header, and then type your calculation code in the expression window.

You refer to the column names using their aliases. You don't have to remember the alias names. You can simply drag the column header onto the Expression area, and Informer will add the alias for you. In the below example, Sales First Name is dragged into the expression box. When the green check mark appears, you can drop it in the box.

The screenshot shows the Entrinsik Informer web application interface. The main header includes the logo and navigation tabs: Reports, Mappings, Security, and Admin. The user is logged in as System Administrator. The main content area is titled 'New Report' and shows a table of data. A 'New Template Column' dialog is open, allowing the user to define a calculated column. The dialog has fields for 'Header', 'Calculated Column', and 'Expression'. The 'Header' field contains 'Sales First Name'. The 'Calculated Column' field contains 'employees_assoc_FirstName'. The 'Expression' field is empty. The dialog also has a 'Drop columns here to remove' section. In the background, the 'Column Display Editor' is visible, showing settings for the 'Sales First Name' column, including its alias, property, alignment, width, format, and hidden status.

If we wanted to concatenate the first and last name together, you could use either Template or Script.

Template Code:

```
${employees_assoc_FirstName} ${employees_assoc_LastName}
```

New Template Column
Embed html templates such as text, links, images, or videos

Header
Calculated Column

Expression
{\$employees_assoc_FirstName} {\$employees_assoc_LastName}

< Back Add Calculation Close

Script Code:

employees_assoc_FirstName+ " " +employees_assoc_LastName;

New Script Column
Choose from a library of registered functions, or create your own

Header
Calculated Column

Expression
employees_assoc_FirstName+ " " +employees_assoc_LastName;

< Back Add Calculation Close

Because you have most all of JavaScript at your fingertips, you can refer to an object's methods and properties:

employees_assoc_FirstName.length - returns the length of first name.

employees_assoc_FirstName.substr(0,1) – returns the first character of first name.

Mathematical calculations can be done. For example, you may have a tuition-due column and a tuition-paid column, and you want to see what a student's balance is. The code might look like this:

tuitionDue – tuitionPaid;



Be sure to use the appropriate alias names for your columns!

For more information on using JavaScript, go to <http://www.w3schools.com>.



Create one or more calculated columns in your report

Adding Aggregate Functions

You can add aggregate functions to the report to provide aggregate values such as count, minimum, maximum, average, and total for any numeric, monetary, or date (Min and Max only) column on the report. To add an aggregate function, click Add Aggregates, and then select the appropriate function and property.

Edit Columns

Save and Close Cancel Reset Add Fields Add Calculations Add Aggregates

Add an Aggregate Function
Add a new aggregate function to your report. Aggregate functions cause results to group by database fields in the report.

Header
Count

Function
Count ▼

Property
of:

...

Add Aggregate

Aggregate function

Close

Column Heading

Property to aggregate (if using function other than Count).

Aggregates will summarize a report to the lowest level of detail on the report. For example, a report containing Student ID, Name, and aggregate totals for attempted and completed credits would be summarized to the individual student. If term is added, then the aggregates would total by student and by term, since term is now the lowest (or most granular) level of detail.

Sorts

Overview	
Title	My Example Report
Description	none
Data source	College ERP
Mapping	Student Course Section
Select Filter	Course Term exactly matches 'V' and (First Name exactly matches 'John' (ignore case) or Last Name exactly matches 'Smith' (ignore case))
Columns	Student ID, Calculated Column, STUDENT PERSON First Name, STUDENT PERSON Last Name, GPA, Count
Sorts	none
Groups	none
Normalize	none
PDF Template	Tim's Template
Tags	Student
Sharing	Private

As seen earlier, you can change the sort order of the report on the fly by clicking the column heading while viewing the report. You can also specify the initial sort order by going into Sorts from the report definition.

Edit Sorting

Save and Close		Cancel	Reset	Refresh Sample
Sorting Order	Sort by	None ▼	<input checked="" type="radio"/> Ascending	<input type="radio"/> Descending

Specify the sort field

Then specify the order

You can add as many sort fields as there are fields on the report.

Edit Sorting

Save and Close					Cancel	Reset	Refresh Sample
Sorting Order	Sort by	Last Name ▼	<input checked="" type="radio"/> Ascending	<input type="radio"/> Descending			
	then by	First Name ▼	<input checked="" type="radio"/> Ascending	<input type="radio"/> Descending			
	then by	None ▼	<input checked="" type="radio"/> Ascending	<input type="radio"/> Descending			

Groups

Overview	
Title	My Example Report
Description	none
Datasource	College ERP
Mapping	Student Course Section
Select Filter	Course Term exactly matches 'W' and (First Name exactly matches 'John' (ignore case) or Last Name exactly matches 'Smith' (ignore case))
Columns	Student ID, Calculated Column, STUDENT PERSON First Name, STUDENT PERSON Last Name, GPA, Count
Sorts	STUDENT PERSON Last Name, STUDENT PERSON First Name, GPA
Groups	none
Normalize	none
PDF Template	Tim's Template
Tags	Student
Sharing	Private

You can group your data by any field on the report. Click on the Groups link to add or change groups.

Edit Grouping

Save and Close		Cancel	Reset
Grouping Order		Choose the sort order for the group	
Choose the field to group on	Group by	Company Name	<input checked="" type="radio"/> Ascending <input type="radio"/> Descending
	then by	None	<input checked="" type="radio"/> Ascending <input type="radio"/> Descending
Calculations			
	<input type="checkbox"/> Check All	<input type="checkbox"/> Min	<input type="checkbox"/> Max
	<input type="checkbox"/> Total	<input type="checkbox"/> Average	
	<input type="checkbox"/> Count		
	<input type="checkbox"/> Order ID	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/> Quantity	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	<input type="checkbox"/> Unit Price	<input type="checkbox"/>	<input type="checkbox"/>
Summary Only		You can also add aggregate functions to	
	<input type="checkbox"/> Run the report in summary only mode		
Display Calculations	<input checked="" type="checkbox"/> Display group calculations automatically without having to expand group		

Summary Only: You can choose to leave the report in groups or click on the Summary Only box and just get a summary of results.

Display Calculations: Groups the data and displays the aggregate results in the Report Results

Groups: <u>Company Name</u> ▲		
Order ID	Company Name	Quantity
+ Company Name: Alfreds Futterkiste (12 items)		
Total : Alfreds Futterkiste (12 items):		174
+ Company Name: Ana Trujillo Emparedados y helados (10 items)		
Total : Ana Trujillo Emparedados y helados (10 items):		63

When the report is run, the groups can be expanded by clicking on the plus sign.

Groups: <u>Company Name</u> ▲						
Order ID	Company Name	Quantity	Unit Price	First Name ▲	Last Name ▲	
+ Company Name: Alfreds Futterkiste (12 items)						
10835	Alfreds Futterkiste	15	55.0000	Nancy	Davolio	
10835	Alfreds Futterkiste	2	13.0000	Nancy	Davolio	
10952	Alfreds Futterkiste	16	25.0000	Nancy	Davolio	
10952	Alfreds Futterkiste	2	45.6000	Nancy	Davolio	
11011	Alfreds Futterkiste	40	13.2500	Janet	Leverling	
11011	Alfreds Futterkiste	20	21.5000	Janet	Leverling	
10692	Alfreds Futterkiste	20	43.9000	Margaret	Peacock	
10702	Alfreds Futterkiste	6	10.0000	Margaret	Peacock	
10702	Alfreds Futterkiste	15	18.0000	Margaret	Peacock	
10643	Alfreds Futterkiste	15	45.6000	Michael	Suyama	

Refresh Display Paged First Previous Page 1 of 2 Next Last Display All

Multi Value View

For SQL datasources, you can collapse a set of records with some fields repeating to simulate the view shown for U2 datasources with multi valued data. You can think of Multi Value View as “un-normalizing” the data.

Edit Multi Value View

Save and Close
Cancel
Reset
Refresh Sample

Select Columns for grouping/collation

Purchase Orders

☐ PO ID
☐ PO DATE

Vendors

☐ Vendor ID

Person

☐ Vendor Name

Items

☐ Item ID
☐ Item
☐ Item Price
☐ Quantity Ordered
☐ Quantity Received

In the result set, Vendor Name is replicated. To only have Office Space listed once, check the Vendor Name box.

PO ID	PO DATE	Vendor ID	Vendor Name	Item ID	Item	Item Price	Quantity Ordered	Quantity Received	Line Total Price
1	Aug 1, 2009	10100	Office Space	1	Office Chair	\$200.00	1	1	\$200.00
1	Aug 1, 2009	10100	Office Space	2	Pens	\$0.20	1000	1000	\$200.00
2	Dec 14, 2009	10101	Cheapbytes	3	Software for Labs	\$100.00	1	1	\$100.00
3	Feb 15, 2010	10100	Office Space	4	Phones	\$200.00	6	6	\$1200.00
4	Mar 15, 2010	10101	Cheapbytes	10	PC's for Labs	\$1000.00	10	10	\$10000.00

Check the boxes next to the values you want collapsed, which are the values that repeat like the Vendor Name above. The fields that are **not** checked become multi valued, and are handled like multi valued fields. This may require you to tweak or rewrite some calculated columns.

Edit Multi Value View

Save and Close Cancel Reset Refresh Sample

Select Columns for grouping/collation

- ☐ Purchase Orders
- ☐ PO ID
- ☐ PO DATE
- ☒ Vendors
 - ☒ Vendor ID
- ☒ Person
 - ☒ Vendor Name
- ☐ Items
 - ☐ Item ID
 - ☐ Item
 - ☐ Item Price
 - ☐ Quantity Ordered
 - ☐ Quantity Received

Line Total Price is a Calculated Column that relies on Item Price and Quantity Ordered. Those fields must now be treated as arrays.

Fields with check marks are collapsed. The Vendor Office Space was listed 3 times in the previous example.

PO ID	PO DATE	Vendor ID	Vendor Name	Item ID	Item	Item Price	Quantity Ordered	Quantity Received	Line Total Price
1	Aug 1, 2009	10100	Office Space	1	Office Chair	\$200.00	1	1	NaN
1	Aug 1, 2009			2	Pens	\$0.20	1000	1000	
3	Feb 15, 2010			4	Phones	\$200.00	6	6	
2	Dec 14, 2009	10101	Cheapbytes	3	Software for Labs	\$100.00	1	1	NaN
4	Mar 15, 2010			10	PC's for Labs	\$1000.00	10	10	

Normalizing

For U2 datasources, you can normalize multi-valued data, which will explode the multi-values into their own rows. As you can see below the Items Desc column has multiple values on one line.

Report Results

Refresh Clear Filter Aggregate Options Summary Only Drag columns here to group

Req Items Id	Items Itm Desc	Req Po Id	Req Shipvia	Req Total Amt
4	Phones	3	BEST	1,200.00
10	PC's for Labs	4	UPS	33,000.00
11	Blade Server			
1	Office Chair	1	BEST	400.00
2	Pens			
5	Biology Textbooks		RWAY	1,800.00
6	Math Textbooks			
7	English Textbooks			
3	Software for Labs	2	SE	100.00
8	Informor software		AVRT	11,800.00
9	Informor license			

Records 1 through 6 of 6 Display Paged First Previous Page 1 of 1 Next Last Display All

Edit Normalizations

Save and Close Cancel Reset Refresh Sample

Association Sets

- ☐ None
- ☒ Req Items Id, Items Itm Desc
- ☐ Define Custom Association Set:
 - ☒ Req Items Id
 - ☒ Items Itm Desc
 - ☐ Req Po Id

Filtering ☒ Apply selection criteria to normalized values

Choose the fields on which to normalize.

Req Items Id	Items Itm Desc	Req Po Id	Req Shipvia	Req Total Amt
1	Office Chair	1	BEST	400.00

After applying the normalizations, each multi-value has its own row.

Req Items Id	Items Itm Desc	Req Po Id	Req Shipvia	Req Total Amt
4	Phones	3	BEST	1,200.00
10	PC's for Labs	4	UPS	33,000.00
11	Blade Server	4	UPS	33,000.00
1	Office Chair	1	BEST	400.00
2	Pens	1	BEST	400.00

PDF Templates

Informer gives you the option to set the PDF Template you want to use for a specific report. In the Report Template, click on the System Default link to choose another template. It will automatically use the default template if none is chosen. Users designated as administrators will have rights to create new PDF templates.

Overview

Title	Tuition Balance by Term
Description	None
Datasource	College ERP
Mapping	Enrollment
Select Filter	Term exactly matches ? and
Columns	Tuition ID, First Name, Middl Due, Amount Paid, Balance
Sorts	None
Groups	None
Normalize	None
PDF Template	System default
Tags	Financials, Person, Tuition
Sharing	Private
Limit Result Count	(none)



*Refer to the
Informer user guide
for instructions on
how to create a
PDF template.*

Click on System Default to
choose template.

Edit General Information

Save and Close Cancel Reset

Name * Tuition Balance by Term

Mapping * College ERP

Enrollment

Description

PDF Template Use default

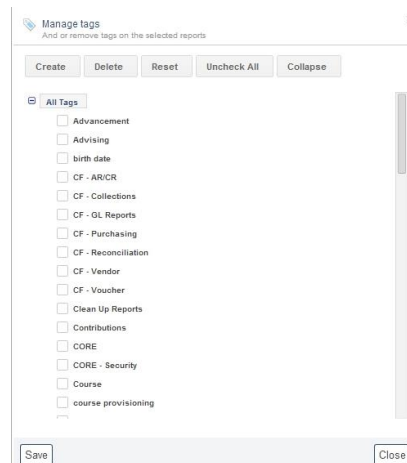
Tags Use default
MS CC
Pam
Tuition [x]

Choose template
from drop down list

Tags

Tags are a sort of filing system to organize the reports in Informer. It is beneficial to establish how you would like to organize your reports before you start building tags. Examples of tags could include departments, divisions, or functions. (Ex. Registration, Business Office, HR, Payroll, etc.) You can create as many or as little tags as are needed. To create tags, go to the Report Parameters Overview and click the None link next to Tags. You can choose the checkboxes to apply a tag, or click Create at the top of the page to type a new tag. Click Save (or Apply, and then Save if you created a new tag) and Close for the tag to be added to the report. If there is no tag assigned to the report, it will be deposited into the (empty) category in the list of tags.

Sorts	None
Groups	None
Normalize	None
PDF Template	System default
Tags	None
Sharing	Private
Limit Result Count	(none)



Sharing a Report

When reports are created, they are by default designated as private, meaning that no one but the report creator and the administrators would have access to the report. In order for other users to view or launch a report created by another user, the report needs to be shared with them, with a security group they are part of, or be made public.

To share a report, go to the Overview on the Report Template and click on the Private link next to the word Sharing.

PDF Template	System default
Tags	Financials, Tuition
Sharing	Private
Limit Result Count	(none)

Click on the word Private to share the report

Tuition Balance by Term

Report
no description provided

Edit Report Sharing

Save and Close Cancel Reset

Sharing

☐ Private

☒ Public

☐ Available only to groups and users listed below:

Allowed users or groups.

Add a user or group

No items listed

Remove

To share a report with the Public, click on the circle next to **Public** and Save and Close.

If you want to share the report with an individual(s), or with a certain security group, click on **Available only to groups and users listed below:**

Then choose your group or individual(s) by browsing to them by clicking the ellipsis next to Allowed users or groups.

Click on ellipsis to bring up browser to search for users

To add users choose Users, Groups, or Users and Groups, and click search. To filter the search, fill in one or many of the fields above and click search. Double click on the user or group to get back to the Edit Report Sharing screen. Click Save and Close.

Principal Search
Search for users and groups

Name

First Name

Last Name

Username

Email

Search ☐ Users ☒ Groups ☐ Users and Groups

Search

Name

Power Users

test

Refresh First Previous Page 1 of 1 Next Last

Choose User or Group by double clicking on selection

Tuition Balance by Term
Report
no description provided

Edit Report Sharing

Save and Close Cancel Reset

Sharing

☐ Private

☒ Public

☐ Available only to groups and users listed below:

Allowed users or groups.

Add a user or group

Remove

Power Users

User or Group is now added to the report sharing. Save and Close

Limit Result Count

Limiting the result count allows the user to run the report with only a selected amount of records to return in the results. An empty value or the value of 0 in this field means that there is no limit for the results. Click on the (none) link next to Limit Result Count.

Overview


Title	Tuition Balance by 1
Description	None
Datasource	College ERP
Mapping	Enrollment
Select Filter	Term exactly match
Columns	Tuition ID, First Name, Last Name, Amount Paid, Amount Due
Sorts	None
Groups	None
Normalize	None
PDF Template	System default
Tags	Financials, Tuition
Sharing	Private
Limit Result Count	(none)


Click on (none) to choose how many results to show


My Example Report

Report

Edit General Information

 Save and Close

 Cancel

 Reset

Name *

My Example Report

Mapping *

College ERP (U2) ▼

COURSE.SECTIONS

...

Description

PDF Template

Use default ▼

Limit Result Count ⓘ

25

Enter number of results wanted in the report.

Using Mapping Suites

A mapping suite is a set of related tables that are segregated by a common value. For example, you may have separate general ledger tables – a general ledger summary table and a general ledger detail table – for each fiscal year. Informer allows you to define one mapping for the summary table and one for the detail table, and then specify the years that are available for reporting. This eliminates the need to have mappings and reports for each table for each year.

When a report refers to a field that is identified with a mapping suite file, the default table set (year) can be used, or the user can be prompted for the table set to use.



Refer to the Informer user guide for instructions on how to define a mapping suite.

Edit General Information

Save and Close Cancel Reset

Name * GL Activity Report

Mapping * College ERP (U2) GLA.FYR

Mapping Suite Mode ☐ Use default table on mapping suite ☒ Prompt for table at runtime

Description

PDF Template Use default

Overview

Title	GL Activity Report
Description	none
Datasource	College ERP (U2)
Mapping	GLA.FYR: Prompt for table at runtime
Select Filter	none
Columns	Gla Id, Gla Trx Date, Gla Items Id, Gla Debit Amt, Gla Credit Amt
Sorts	none
Groups	none
Normalize	none
PDF Template	System default
Tags	none
Sharing	Private

If you choose to prompt for the suite table at runtime, you will be asked to select the appropriate table when the report is executed.

Financial Aid Students-RL
Report Results
Enrollment report

Report Results
Analytics
Charting

Tables

Choose Table
2010

Launch Report

Report Results

Refresh
Clear Filter
Aggregate Options
Summary Only
Drag columns here to group

SA ACCEPTED
SA ACYR ID
SA AWARDED
STUDENT Student ID
STUDENT PERSON Last Name
STUDENT PERSON

No items listed

Refresh

check all
check none

2009 2009 - sa_2009
2010 2010 - sa_2010

If using the default, the table specified as the default on the mapping suite will be used.



Chapter 4: Launching Reports

In This Chapter



In this chapter, we will:

- Launch a report
- Adjust the report results
- Export the report results
- Archive the report
- Perform analytics on report results
- Create charts from report results

Launching a Report

There are two simple methods for launching an existing report. The first method is to click on the launch link in the Reports Listing.

Reports Listing

Report Title ▾	Options	Favorite	Created By	Last Executed
Tuition Balance by Term no description provided	 Launch  Details	☆	Informer Administrator	6/7/10

The second method is using the Data tab on the Report Template page. Click on the report title to go to the Report Template page. Then click on the Data tab.

Reports Listing

Search Reports		On selected reports...			
Report Title	Options	Favorite	Created By	Last Executed	
Tuition Balance by Term no description provided	Launch Details	☆	Informer Administrator	6/7/10	

REPORT TEMPLATE

DATA

USER SETTINGS

Tuition Balance by Term
Report
no description provided

Overview

Title	Tuition Balance by Term
-------	-------------------------

Some reports may require you to enter some criteria in order to filter the results properly. You will be asked for the runtime parameters before the report is launched. If you want Informer to ignore the case of the text you enter, check the box by “Ignore case”.

Another feature available when launching a report is to use the Aggregate Options selection. It gives you the choice to find the Total, Average, Min, or Max of a column.

Runtime Parameters

Term exactly matches: FA2007

State exactly matches: NC ☒ Ignore case

Report Results

Student Name	<input type="checkbox"/> Check All	<input type="checkbox"/> Min	<input type="checkbox"/> Max	<input checked="" type="checkbox"/> Total	<input checked="" type="checkbox"/> Average	State	Invoice Date	Home Number	Amount Due	Amount Paid	Balance
WINCHESTER, JAINNA MINDY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	NC	Apr 29, 2007	(275) 524-487	\$1,500.00	\$82.00	\$1,418.00
ADAM, GAYLE NATHANIEL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	NC	Apr 5, 2007	(478) 236-586	\$500.00	\$215.00	\$285.00
SHARKEY, SOCORRO LAUREL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	NC	Apr 7, 2007	(224) 667-188	\$500.00	\$339.00	\$161.00
ANDERSON, ROYCE RENALDO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	NC	Apr 28, 2007	(196) 852-795	\$500.00	\$414.00	\$86.00
DEW, BERTA SONDRA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	NC	Apr 3, 2007	(859) 697-978	\$500.00	\$129.00	\$371.00
SYKES, MARTA DINIA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	NC	Jun 23, 2007	(618) 613-356	\$1,000.00	\$252.00	\$748.00

It adds the aggregate results to the bottom of the report.

CHURCH, CASEY JAMES	M	FA2007 (Fall 2007)	495 RIVA TRACE STREET Fayetteville NC	NC	Apr 7, 2007	(447) 674-221	\$500.00	\$370.00	\$130.00
COWARD, FLORENCIO ELI	M	FA2007 (Fall 2007)	361 GLEN MILL STREET Greensboro NC	NC	May 27, 2007	(211) 426-461	\$500.00	\$170.00	\$373.00
CHO, DEANGELO LINDSAY	M	FA2007 (Fall 2007)	166 ROANOKE LANE Greensboro NC	NC	Apr 11, 2007	(524) 735-575	\$500.00	\$250.00	\$250.00
TUBBS, INES KRYSTAL	F	FA2007 (Fall 2007)	142 SURE AND STEADFAST BOULEVARD Raleigh NC	NC	Jun 18, 2007	(974) 756-586	\$1,000.00	\$383.00	\$617.00
ARMSTRONG, VICTORIA WYNN	F	FA2007 (Fall 2007)	156 PARKMAN GRANT ROAD Durham NC	NC	Apr 1, 2007	(386) 779-696	\$500.00	\$160.00	\$340.00
Average (92 items):							\$592.39	\$278.24	\$314.15
Total (92 items):							\$54,500.00	\$25,598.00	\$28,902.00

There is also the option to choose Summary Only when you run a report. As seen below, when that option is chosen, the report output will display the summary of the aggregate selections. Aggregate columns can be for any numeric field including linked fields from other files.

Report Results

Count	Amount Due (Avg)	Amount Due (Total)	Amount Paid (Avg)	Amount Paid (Total)	Balance (Avg)	Balance (Total)
92	\$592.39	\$54,500.00	\$278.24	\$25,598.00	\$314.15	\$28,902.00

Refresh

Records 1 through 1 of 1 Display Paged First Previous Page 1 of 1 Next Last Display


If the report you are running utilizes a file from a mapping suite, you will be asked to select the appropriate table set from within the suite.

Choose Table

2010

Informer will generate the report and display the results.

Report Results

<div>  Refresh <input type="checkbox"/> Clear Filter <div>Drag columns here to group</div> </div>								
Student Name	Term	Address	Home Number	Amount Due	Amount Paid	Balance	2 / 3 Remaining	Difference
EDWARDS, ETHAN ALFRED	SP2007	302 CROSSROADS VALLEY STREET,Billings,MT	(877) 663-364	\$500.00	\$374.00	\$126.00		\$126
EDWARDS, ETHAN ALFRED	SU2007	302 CROSSROADS VALLEY STREET,Billings,MT	(877) 663-364	\$500.00	\$307.00	\$193.00	< 1/3 Paid	\$193
EDWARDS, ETHAN ALFRED	SU2009	302 CROSSROADS VALLEY STREET,Billings,MT	(877) 663-364	\$500.00	\$57.00	\$443.00	< 1/3 Paid	\$443
EDWARDS, ETHAN ALFRED	FA2005	302 CROSSROADS VALLEY STREET,Billings,MT	(877) 663-364	\$500.00	\$499.00	\$1.00		\$1
EDWARDS, ETHAN ALFRED	FA2006	302 CROSSROADS VALLEY STREET,Billings,MT	(877) 663-364	\$500.00	\$282.00	\$218.00	< 1/3 Paid	\$218
EDWARDS, ETHAN ALFRED	FA2009	302 CROSSROADS VALLEY STREET,Billings,MT	(877) 663-364	\$500.00	\$314.00	\$186.00	< 1/3 Paid	\$186
HANES, BRIDGETTE SELENA	SP2007	40 DRAWBRIDGE STREET,Hayward,CA	(218) 993-623	\$500.00	\$388.00	\$112.00		\$112
HANES, BRIDGETTE SELENA	SP2009	40 DRAWBRIDGE STREET,Hayward,CA	(218) 993-623	\$500.00	\$164.00	\$336.00	< 1/3 Paid	\$336
HANES, BRIDGETTE SELENA	SU2009	40 DRAWBRIDGE STREET,Hayward,CA	(218) 993-623	\$1,000.00	\$339.00	\$661.00	< 1/3 Paid	\$661
HANES, BRIDGETTE SELENA	FA2006	40 DRAWBRIDGE STREET,Hayward,CA	(218) 993-623	\$500.00	\$373.00	\$127.00		\$127
HANES, BRIDGETTE SELENA	FA2007	40 DRAWBRIDGE STREET,Hayward,CA	(218) 993-623	\$500.00	\$355.00	\$145.00		\$145
NAVARRO, JOHNATHAN DARWIN	SP2007	228 PRESTONWOOD STREET,Lafayette,LA	(186) 427-163	\$500.00	\$137.00	\$363.00	< 1/3 Paid	\$363
NAVARRO, JOHNATHAN DARWIN	SP2009	228 PRESTONWOOD STREET,Lafayette,LA	(186) 427-163	\$500.00	\$317.00	\$183.00	< 1/3 Paid	\$183
NAVARRO, JOHNATHAN DARWIN	SU2008	228 PRESTONWOOD STREET,Lafayette,LA	(186) 427-163	\$1,000.00	\$365.00	\$635.00	< 1/3 Paid	\$635
NAVARRO, JOHNATHAN DARWIN	FA2005	228 PRESTONWOOD STREET,Lafayette,LA	(186) 427-163	\$500.00	\$456.00	\$44.00		\$44
NAVARRO, JOHNATHAN DARWIN	FA2008	228 PRESTONWOOD STREET,Lafayette,LA	(186) 427-163	\$500.00	\$158.00	\$342.00	< 1/3 Paid	\$342
DABNEY, KRISTIE DARLENE	SP2006	297 BLUE BOAR LANE,Sioux Falls,SD	(729) 529-846	\$500.00	\$155.00	\$345.00	< 1/3 Paid	\$345
DABNEY, KRISTIE DARLENE	SP2008	297 BLUE BOAR LANE,Sioux Falls,SD	(729) 529-846	\$500.00	\$17.00	\$483.00	< 1/3 Paid	\$483
DABNEY, KRISTIE DARLENE	FA2008	297 BLUE BOAR LANE,Sioux Falls,SD	(729) 529-846	\$1,000.00	\$843.00	\$157.00		\$157
DABNEY, KRISTIE DARLENE	FA2009	297 BLUE BOAR LANE,Sioux Falls,SD	(729) 529-846	\$1,000.00	\$803.00	\$197.00		\$197
ARANDA, WILLIS CRISTOBAL	SP2006	287 CRUSADER STREET,Syracuse,NY	(746) 949-527	\$500.00	\$344.00	\$156.00		\$156
ARANDA, WILLIS CRISTOBAL	SU2007	287 CRUSADER STREET,Syracuse,NY	(746) 949-527	\$500.00	\$418.00	\$82.00		\$82
ARANDA, WILLIS CRISTOBAL	SU2008	287 CRUSADER STREET,Syracuse,NY	(746) 949-527	\$1,000.00	\$826.00	\$174.00		\$174
ARANDA, WILLIS CRISTOBAL	SU2010	287 CRUSADER STREET,Syracuse,NY	(746) 949-527	\$500.00	\$134.00	\$366.00	< 1/3 Paid	\$366
ARANDA, WILLIS CRISTOBAL	FA2007	287 CRUSADER STREET,Syracuse,NY	(746) 949-527	\$500.00	\$496.00	\$4.00		\$4

Refresh

Records 1 through 25 of 47914 Display Paged First Previous Page 1 of 1917 Next Last Display All

Below the report results, Informer lists the number of records returned, the number of pages in the report, along with paging controls.

ARANDA, WILLIS CRISTOBAL	006	287 CRUSADER STREET, Syracuse, NY	(746) 949-527	\$500.00	\$344.00	\$156.00		
ARANDA, WILLIS CRISTOBAL	SU2007	287 CRUSADER STREET, Syracuse, NY	(746) 949-527	\$500.00	\$418.00	\$82.00		\$82
ARANDA, WILLIS CRISTOBAL	SU2008	287 CRUSADER STREET, Syracuse, NY	(746) 949-527	\$1,000.00	\$826.00	\$174.00		\$174
ARANDA, WILLIS CRISTOBAL	SU2010	287 CRUSADER STREET, Syracuse, NY	(746) 949-527	\$500.00	\$134.00	\$366.00	< 1/3 Paid	\$366
ARANDA, WILLIS CRISTOBAL	FA2007	287 CRUSADER STREET, Syracuse, NY	(746) 949-527	\$500.00	\$496.00	\$4.00		\$4

Refresh Records 1 through 25 of 47914 Display Paged First Previous Page 1 of 1917 Next Last Display All

Page Slider # of Records Page controls

The page slider can be used to quickly page through the report. Click on the slider button and move the mouse to the right or left to flip through the report several pages at a time. You can also use the Previous and Next links to page through the results one page at a time, or use the First and Last to jump to the first page or the last page of the report. To display all the records on one page, click “Display All”. To switch back to a paged view, click “Display Paged”.

Adjusting the Report Results

Once you have the report displayed, you can change the results by:

- Changing the sort order
- Reordering the columns
- Grouping the results

Change the Sort Order

To change the order in which the report is sorted, click on the column header that you want to sort by. In this example, we change the sort order to Student Name by clicking on the Student Name column header.

Report Results								
Refresh Clear Filter Drag columns here to group								
Student Name	Term	Address	Home Number	Amount Due	Amount Paid	Balance	2/3 Remaining	Difference
DARIUS SUNG	SP2006	322 HUTTON AVENUE, Fort Worth, TX	(558) 174-646	\$500.00	\$163.00	\$337.00	< 1/3 Paid	\$337
DARIUS SUNG	S		(558) 174-646	\$500.00	\$464.00	\$36.00		\$36
DARIUS SUNG	S		(558) 174-646	\$1,000.00	\$675.00	\$325.00		\$325
DARIUS SUNG	S		(558) 174-646	\$1,000.00	\$264.00	\$736.00	< 1/3 Paid	\$736
AARON, BENTON JARRETT	S		(115) 385-912	\$500.00	\$317.00	\$183.00	< 1/3 Paid	\$183
AARON, BENTON JARRETT	SP2010	340 DUTCHESS LANE, Hollywood, FL	(115) 385-912	\$500.00	\$495.00	\$5.00		\$5
AARON, BENTON JARRETT	SU2008	340 DUTCHESS LANE, Hollywood, FL	(115) 385-912	\$1,000.00	\$858.00	\$142.00		\$142
AARON, BENTON JARRETT	FA2007	340 DUTCHESS LANE, Hollywood, FL	(115) 385-912	\$500.00	\$277.00	\$223.00	< 1/3 Paid	\$223
AARON, BENTON JARRETT	FA2008	340 DUTCHESS LANE, Hollywood, FL	(115) 385-912	\$500.00	\$359.00	\$141.00		\$141
ABBOTT, WENDY ANGELIA	SP2009	468 MACINTYRE COMMONS COURT, Baton Rouge, LA	(846) 624-452	\$1,000.00	\$771.00	\$229.00		\$229
ABBOTT, WENDY ANGELIA	SU2009	468 MACINTYRE COMMONS COURT, Baton Rouge, LA	(846) 624-452	\$500.00	\$104.00	\$396.00	< 1/3 Paid	\$396
ABBOTT, WENDY ANGELIA	FA2006	468 MACINTYRE COMMONS COURT, Baton Rouge, LA	(846) 624-452	\$1,000.00	\$187.00	\$813.00	< 1/3 Paid	\$813
ABBOTT, WENDY ANGELIA	FA2007	468 MACINTYRE COMMONS COURT, Baton Rouge, LA	(846) 624-452	\$500.00	\$223.00	\$277.00	< 1/3 Paid	\$277
ABEL, CHI MARQUIS	SP2006	265 CASABLANCA STREET, Grand Prairie, TX	(881) 575-421	\$500.00	\$221.00	\$279.00	< 1/3 Paid	\$279

Click the column heading to sort.

Notice the arrow that appears next to the Student Name heading. This means the report is sorted in ascending order by Student Name. To change the sort order to descending, click on the Student Name heading again.

Report Results

Refresh Clear Filter Drag columns here to group

Student Name	Term	Address	Home Number	Amount Due	Amount Paid	Balance	2/3 Remaining	Difference
ZUNIGA, RUSSELL SUNG	SP2008	486 CORRAL BOULEVARD, Salem, OR	(928) 847-533	\$500.00	\$59.00	\$441.00	< 1/3 Paid	\$441
ZUNIGA, RUSSELL SUNG	SU2010	486 CORRAL BOULEVARD, Salem, OR	(928) 847-533	\$1,000.00	\$124.00	\$876.00	< 1/3 Paid	\$876
ZUNIGA, RUSSELL SUNG	FA2006	486 CORRAL BOULEVARD, Salem, OR	(928) 847-533	\$500.00	\$71.00	\$429.00	< 1/3 Paid	\$429
ZUNIGA, RUSSELL SUNG	FA2008	486 CORRAL BOULEVARD, Salem, OR	(928) 847-533	\$1,000.00	\$874.00	\$126.00	< 1/3 Paid	\$126
ZUNIGA, OTIS MATHEW	SP2006	204 ARROW HEAD STREET, Laredo, TX	(381) 868-394	\$500.00	\$317.00	\$183.00	< 1/3 Paid	\$183
ZUNIGA, OTIS MATHEW	SP2007	204 ARROW HEAD STREET, Laredo, TX	(381) 868-394	\$500.00	\$468.00	\$32.00	< 1/3 Paid	\$32
ZUNIGA, OTIS MATHEW	SP2008	204 ARROW HEAD STREET, Laredo, TX	(381) 868-394	\$500.00	\$46.00	\$454.00	< 1/3 Paid	\$454
ZUNIGA, OTIS MATHEW	SP2010	204 ARROW HEAD STREET, Laredo, TX	(381) 868-394	\$500.00	\$207.00	\$293.00	< 1/3 Paid	\$293
ZUNIGA, OTIS MATHEW	SU2010	204 ARROW HEAD STREET, Laredo, TX	(381) 868-394	\$500.00	\$184.00	\$316.00	< 1/3 Paid	\$316
ZUNIGA, OTIS MATHEW	FA2008	204 ARROW HEAD STREET, Laredo, TX	(381) 868-394	\$500.00	\$4.00	\$496.00	< 1/3 Paid	\$496
ZUNIGA, MERLE WILBUR	SP2006	368 PAINTED FALL AVENUE, Chicago, IL	(577) 978-559	\$500.00	\$88.00	\$412.00	< 1/3 Paid	\$412
ZUNIGA, MERLE WILBUR	SU2007	368 PAINTED FALL AVENUE, Chicago, IL	(577) 978-559	\$500.00	\$294.00	\$206.00	< 1/3 Paid	\$206
ZUNIGA, MERLE WILBUR	SU2008	368 PAINTED FALL AVENUE, Chicago, IL	(577) 978-559	\$500.00	\$269.00	\$231.00	< 1/3 Paid	\$231
ZUNIGA, MERLE WILBUR	SU2009	368 PAINTED FALL AVENUE, Chicago, IL	(577) 978-559	\$500.00	\$126.00	\$374.00	< 1/3 Paid	\$374

The arrow is now pointing down, indicating that the results are listed in descending order.

You can choose more than one column to use in sorting by pressing the Ctrl (Control) key on your keyboard while clicking the additional column headers. For example, if you wanted the above report to be sorted by Student Name and Term, click the Student Name column, press and hold the Ctrl key, and then click Term.

Report Results

Refresh Clear Filter Drag columns here to group

Student Name	Term	Address	Home Number	Amount Due	Amount Paid	Balance	2/3 Remaining	Difference
DARIUS SUNG	SP2006	322 DUTTON AVENUE, F		\$500.00	\$163.00	\$337.00	< 1/3 Paid	\$337
DARIUS SUNG		322 DUTTON AVENUE, F		\$500.00	\$464.00	\$36.00	< 1/3 Paid	\$36
DARIUS SUNG		322 DUTTON AVENUE, F		\$1,000.00	\$675.00	\$325.00	< 1/3 Paid	\$325
DARIUS SUNG		322 DUTTON AVENUE, F		\$1,000.00	\$264.00	\$736.00	< 1/3 Paid	\$736
AARON, BENTON		340 DUTCHESS LANE, H		\$500.00	\$277.00	\$223.00	< 1/3 Paid	\$223
AARON, BENTON		340 DUTCHESS LANE, H		\$500.00	\$359.00	\$141.00	< 1/3 Paid	\$141
AARON, BENTON		340 DUTCHESS LANE, Hollywood, FL	(115) 385-912	\$500.00	\$317.00	\$183.00	< 1/3 Paid	\$183
AARON, BENTON JARRETT	SP2010	340 DUTCHESS LANE, Hollywood, FL	(115) 385-912	\$500.00	\$495.00	\$5.00	< 1/3 Paid	\$5
AARON, BENTON JARRETT	SU2008	340 DUTCHESS LANE, Hollywood, FL	(115) 385-912	\$1,000.00	\$858.00	\$142.00	< 1/3 Paid	\$142
ABBOTT, WENDY ANGELIA	FA2006	468 MACINTYRE COMMONS COURT, Baton Rouge, LA	(846) 624-452	\$1,000.00	\$187.00	\$813.00	< 1/3 Paid	\$813
ABBOTT, WENDY ANGELIA	FA2007	468 MACINTYRE COMMONS COURT, Baton Rouge, LA	(846) 624-452	\$500.00	\$223.00	\$277.00	< 1/3 Paid	\$277
ABBOTT, WENDY ANGELIA	SP2009	468 MACINTYRE COMMONS COURT, Baton Rouge, LA	(846) 624-452	\$1,000.00	\$771.00	\$229.00	< 1/3 Paid	\$229
ABBOTT, WENDY ANGELIA	SU2009	468 MACINTYRE COMMONS COURT, Baton Rouge, LA	(846) 624-452	\$500.00	\$104.00	\$396.00	< 1/3 Paid	\$396
ABEL, CHI MARQUIS	FA2008	265 CASABLANCA STREET, Grand Prairie, TX	(681) 575-421	\$500.00	\$218.00	\$282.00	< 1/3 Paid	\$282

Clicking the column header a third time while holding the Ctrl key will remove the sort from that column.

Reordering the Columns

You can change the order that the columns appear in the report simply by dragging the column header to the new location.

Report Results

Refresh Clear Filter Drag columns here to group

Student Name	Term	Address	Home Number	Amount Due	Amount Paid	Balance	2 / 3 Remaining	Difference
DARIUS SUNG	SP2006	322 HUTTON AVENUE,Fort Worth,TX	(558) 174-646	\$500.00	\$163.00	\$337.00	< 1/3 Paid	\$337
DARIUS SUNG	SP2008	322 HUTTON AVENUE,Fort Worth,TX	(558) 174-646	\$500.00	\$464.00	\$36.00		\$36
DARIUS SUNG	SP2009	322 HUTTON AVENUE,Fort Worth,TX	(558) 174-646	\$1,000.00	\$675.00	\$325.00		\$325
DARIUS SUNG	SU2010	322 HUTTON AVENUE,Fort Worth,TX	(558) 174-646	\$1,000.00	\$264.00	\$736.00	< 1/3 Paid	\$736
AARON, BENTON JARRETT	SP2009	340 DUTCHESS LANE,Hollywood,FL	(115) 385-912	\$500.00	\$317.00	\$183.00	< 1/3 Paid	\$183
AARON, BENTON JARRETT	SP2010	340 DUTCHESS LANE,Hollywood,FL	(115) 385-912	\$500.00	\$495.00	\$5.00		\$5
AARON, BENTON JARRETT	SU2008	340 DUTCHESS LANE,Hollywood,FL	(115) 385-912	\$1,000.00	\$858.00	\$142.00		\$142
AARON, BENTON JARRETT	FA2007	340 DUTCHESS LANE,Hollywood,FL	(115) 385-912	\$500.00	\$277.00	\$223.00	< 1/3 Paid	\$223
AARON, BENTON JARRETT	FA2008	340 DUTCHESS LANE,Hollywood,FL	(115) 385-912	\$500.00	\$359.00	\$141.00		\$141
ABBOTT, WENDY ANGELIA	SP2009	468 MACINTYRE COMMONS COURT,Baton Rouge,LA	(846) 624-452	\$1,000.00	\$771.00	\$229.00		\$229
ABBOTT, WENDY ANGELIA	SU2009	468 MACINTYRE COMMONS COURT,Baton Rouge,LA	(846) 624-452	\$500.00	\$104.00	\$396.00	< 1/3 Paid	\$396
ABBOTT, WENDY ANGELIA	FA2006	468 MACINTYRE COMMONS COURT,Baton Rouge,LA	(846) 624-452	\$1,000.00	\$187.00	\$813.00	< 1/3 Paid	\$813
ABBOTT, WENDY ANGELIA	FA2007	468 MACINTYRE COMMONS COURT,Baton Rouge,LA	(846) 624-452	\$500.00	\$223.00	\$277.00	< 1/3 Paid	\$277
ABEL, CHI MARQUIS	SP2006	265 CASABLANCA STREET,Grand Prairie,TX	(981) 575-421	\$500.00	\$221.00	\$279.00	< 1/3 Paid	\$279

Grouping the Results

You can group data by dragging the column header to the Grouping area. To group our report by term, drag the Term column heading to the block that says “Drag columns here to group”.

Report Results

Refresh Clear Filter Drag columns here to group

Student Name	Term	Address	Home Number	Amount Due	Amount Paid	Balance	2 / 3 Remaining	Difference
EDWARDS, ETHAN ALFRED	SP2007	302 CROSSROADS VALLEY STREET,Billings,MT	(877) 663-364	\$500.00	\$374.00	\$126.00		\$126
EDWARDS, ETHAN ALFRED	SU2007	302 CROSSROADS VALLEY STREET,Billings,MT	(877) 663-364	\$500.00	\$307.00	\$193.00	< 1/3 Paid	\$193
EDWARDS, ETHAN ALFRED	SU2009	302 CROSSROADS VALLEY STREET,Billings,MT	(877) 663-364	\$500.00	\$57.00	\$443.00	< 1/3 Paid	\$443
EDWARDS, ETHAN ALFRED	FA2005	302 CROSSROADS VALLEY STREET,Billings,MT	(877) 663-364	\$500.00	\$499.00	\$1.00		\$1
EDWARDS, ETHAN ALFRED	FA2006	302 CROSSROADS VALLEY STREET,Billings,MT	(877) 663-364	\$500.00	\$282.00	\$218.00	< 1/3 Paid	\$218
EDWARDS, ETHAN ALFRED	FA2009	302 CROSSROADS VALLEY STREET,Billings,MT	(877) 663-364	\$500.00	\$314.00	\$186.00	< 1/3 Paid	\$186
HANES, BRIDGETTE SELENA	SP2007	40 DRAWBRIDGE STREET,Hayward,CA	(218) 993-623	\$500.00	\$388.00	\$112.00		\$112
HANES, BRIDGETTE SELENA	SP2009	40 DRAWBRIDGE STREET,Hayward,CA	(218) 993-623	\$500.00	\$164.00	\$336.00	< 1/3 Paid	\$336
HANES, BRIDGETTE SELENA	SU2009	40 DRAWBRIDGE STREET,Hayward,CA	(218) 993-623	\$1,000.00	\$339.00	\$661.00	< 1/3 Paid	\$661
HANES, BRIDGETTE SELENA	FA2006	40 DRAWBRIDGE STREET,Hayward,CA	(218) 993-623	\$500.00	\$373.00	\$127.00		\$127

Informer will group the report by term.

Report Results

Refresh

Clear Filter

Drag columns here to group

Groups:

Term

Functions:

Total

Average

Max

Min

Student Name	Term	Address	Home Number	Amount Due	Amount Paid	Balance	2 / 3 Remaining	Difference
Term: FA2005 (797 items)								
Term: FA2006 (3113 items)								
Term: FA2007 (3213 items)								
Term: FA2008 (3233 items)								
Term: FA2009 (3180 items)								
Term: SP2006 (3381 items)								
Term: SP2007 (3518 items)								
Term: SP2008 (3454 items)								
Term: SP2009 (3399 items)								
Term: SP2010 (3444 items)								
Term: SU2006 (3444 items)								
Term: SU2007 (3410 items)								
Term: SU2008 (3432 items)								
Term: SU2009 (3461 items)								
Term: SU2010 (3435 items)								

In order to see the detail within a group, click on the plus sign by the group. Informer will expand the group to show the detail.

Student Name

Term

Term: FA2005 (797 items)

Student Name	Term	Address	Home Number	Amount Due	Amount Paid	Balance	2 / 3 Remaining	Difference
Term: FA2005 (797 items)								
EDWARDS, ETHAN ALFRED	FA2005	302 CROSSROADS VALLEY STREET,Billings,MT	(877) 663-364	\$500.00	\$499.00	\$1.00		\$
NAVARRO, JOHNATHAN DARWIN	FA2005	228 PRESTONWOOD STREET,Lafayette,LA	(186) 427-163	\$500.00	\$456.00	\$44.00		\$4
DIAMOND, MILES ABEL	FA2005	479 TRYON BOULEVARD,Austin,TX	(337) 111-354	\$500.00	\$13.00	\$487.00	< 1/3 Paid	\$48
LENNON, WILLIE CINDY	FA2005	154 PHILLIPS MEDICAL ROAD,High Point,NC	(942) 323-133	\$500.00	\$116.00	\$384.00	< 1/3 Paid	\$38
VICKERY, LAVERN RALEIGH	FA2005	385 CANDYTUFF DRIVE,Coral Springs,FL	(946) 282-858	\$500.00	\$208.00	\$292.00	< 1/3 Paid	\$29
MATHESON, ANGELA FLORENCE	FA2005	13 LAKESIDE LANE,Hayward,CA	(792) 755-718	\$500.00	\$89.00	\$411.00	< 1/3 Paid	\$41
ALCORN, KAREEM CONRAD	FA2005	286 KNIGHTSBRIDGE DRIVE,Hollywood,FL	(378) 236-327	\$500.00	\$280.00	\$220.00	< 1/3 Paid	\$22
WINDSOR, BOOKER HOWARD	FA2005	338 ADVENTURE STREET,Santa Clara,CA	(737) 124-985	\$500.00	\$46.00	\$454.00	< 1/3 Paid	\$45
LYLE, ELIZABETH LOIS	FA2005	442 STONE FERRIS AVENUE,Fresno,CA	(658) 493-686	\$500.00	\$188.00	\$312.00	< 1/3 Paid	\$31
TERRY, ROBBIE THERON	FA2005	314 CENTENNIAL LANE,Wichita,KS	(682) 333-355	\$500.00	\$472.00	\$28.00		\$2
Refresh				Display Paged First Previous Page 1 of 80 Next Last Display A				
Term: FA2006 (3113 items)								
Term: FA2007 (3213 items)								

If there are more than 10 records in the group, use the paging controls to navigate through the remaining records.

LYLE, ELIZABETH LOIS	FA2005	442 STONE FERRIS AVENUE, Fresno, CA	(658) 493-686	\$500.00	\$188.00	\$312.00	< 1/3 Paid	\$312.00
TERRY, ROBBIE THERON	FA2005	314 CENTENNIAL LANE, Wichita, KS	(682) 333-355	\$500.00	\$472.00	\$28.00		\$28.00
Refresh	<div><div></div></div>						Display Paged	First Previous Page 1 of 80 Next Last Display All
Term: FA2006 (3113 items)								
Term: FA2007 (3213 items)								

To collapse the group, click the minus sign beside the group.

Student Name	Term	Address	Home Number	Amount Due	Amount Paid	Balance	2/3 Remaining	Difference
Term: FA2005 (797 items)								
EDWARDS, ETHAN ALFRED	FA2005	302 CROSSROADS VALLEY STREET,Billings,MT	(877) 663-364	\$500.00	\$499.00	\$1.00		\$1
NAVARRO, JOHNATHAN DARWIN	FA2005	228 PRESTONWOOD STREET,Lafayette,LA	(186) 427-163	\$500.00	\$456.00	\$44.00		\$44
DAMOND, MILES ABEL	FA2005	479 TRYON BOULEVARD,Austin,TX	(337) 111-354	\$500.00	\$13.00	\$487.00	< 1/3 Paid	\$487
LENNON, WILLIE CINDY	FA2005	154 PHILLIPS MEDICAL ROAD,High Point,NC	(942) 323-133	\$500.00	\$116.00	\$384.00	< 1/3 Paid	\$384
VICKERY, LAVERN RALEIGH	FA2005	385 CANDYTUFF DRIVE,Coral Springs,FL	(946) 282-858	\$500.00	\$208.00	\$292.00	< 1/3 Paid	\$292
MATHESON, ANGELA FLORENCE	FA2005	13 LAKESIDE LANE,Hayward,CA	(792) 755-718	\$500.00	\$89.00	\$411.00	< 1/3 Paid	\$411
ALCORN, KAREEM CONRAD	FA2005	286 KNIGHTSBRIDGE DRIVE,Hollywood,FL	(378) 236-327	\$500.00	\$280.00	\$220.00	< 1/3 Paid	\$220
WINDSOR, BOOKER HOWARD	FA2005	338 ADVENTURE STREET,Santa Clara,CA	(737) 124-985	\$500.00	\$46.00	\$454.00	< 1/3 Paid	\$454
LYLE, ELIZABETH LOIS	FA2005	442 STONE FERRIS AVENUE,Fresno,CA	(658) 493-686	\$500.00	\$188.00	\$312.00	< 1/3 Paid	\$312
TERRY, ROBBIE THERON	FA2005	314 CENTENNIAL LANE,Wichita,KS	(682) 333-355	\$500.00	\$472.00	\$28.00		\$28

Refresh

Display Paged First Previous Page 1 of 80 Next Last Display All

Term: FA2006 (3113 items)

Term: FA2007 (3213 items)

Student Name	Term	Address	Home Number	Amount Due
Term: FA2005 (797 items)				
Term: FA2006 (3113 items)				
Term: FA2007 (3213 items)				
Term: FA2008 (3233 items)				


You can change the order of the group by clicking on the grouped field.


Report Results

Refresh Clear Filter Drag columns here to group

Groups: Term Functions: ☐ Total ☐ Average ☐ Max ☐ Min

Student Name	Term	Address	Home Number	Amount Due	Amount Paid	Balance	2/3 Remaining	Difference
+ Term: SU2010 (3435 items)								
+ Term: SU2009 (3461 items)								
+ Term: SU2008 (3432 items)								
+ Term: SU2007 (3410 items)								
+ Term: SU2006 (3444 items)								
+ Term: SP2010 (3444 items)								

If you wish to remove the grouping from the report, click on the  icon beside the group.

Groups: Term 

Student Name	Term
+ Term: FA2005 (797 items)	
+ Term: FA2006 (3113 items)	
+ Term: FA2007 (3213 items)	

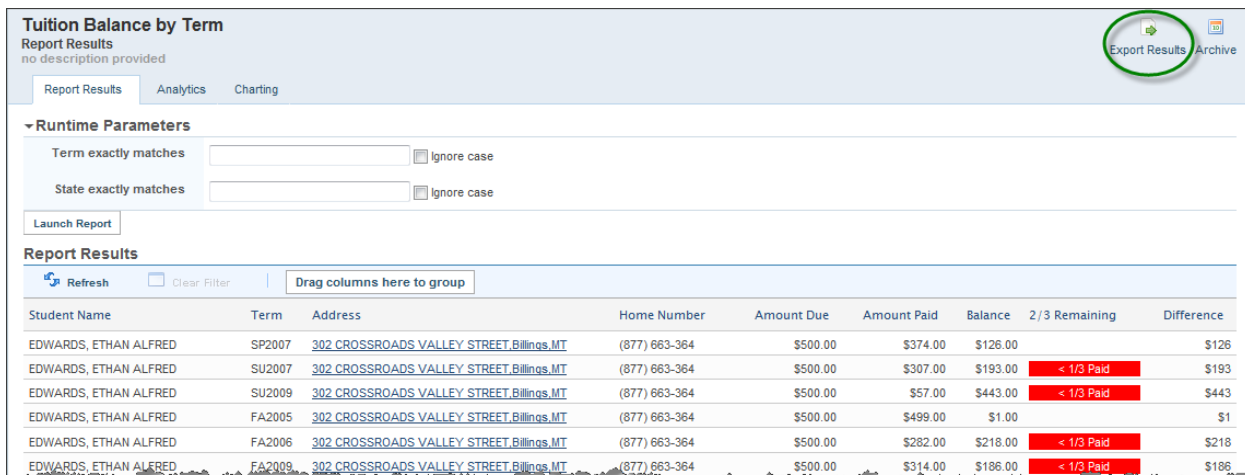
Exporting the Report

Once the report is generated, you may need the output in some other form, such as an Excel spreadsheet or a PDF document. Informer will export to the following formats:

- Excel CSV file
- PDF
- Webpage (HTML)
- Delimited text with customized delimiter
- Tab-delimited text
- XML
- Fixed Length Columns
- Live Excel spreadsheet
- Savedlist (U2 only)

The most commonly used formats are Excel CSV, PDF, and Live Excel, which we will cover in this training. For the other formats, refer to the Informer user's guide for details on their settings.

To export the report, click the Export Results link in the report results window.



Tuition Balance by Term
Report Results
no description provided

Report Results Analytics Charting

▼ Runtime Parameters

Term exactly matches ☐ Ignore case

State exactly matches ☐ Ignore case

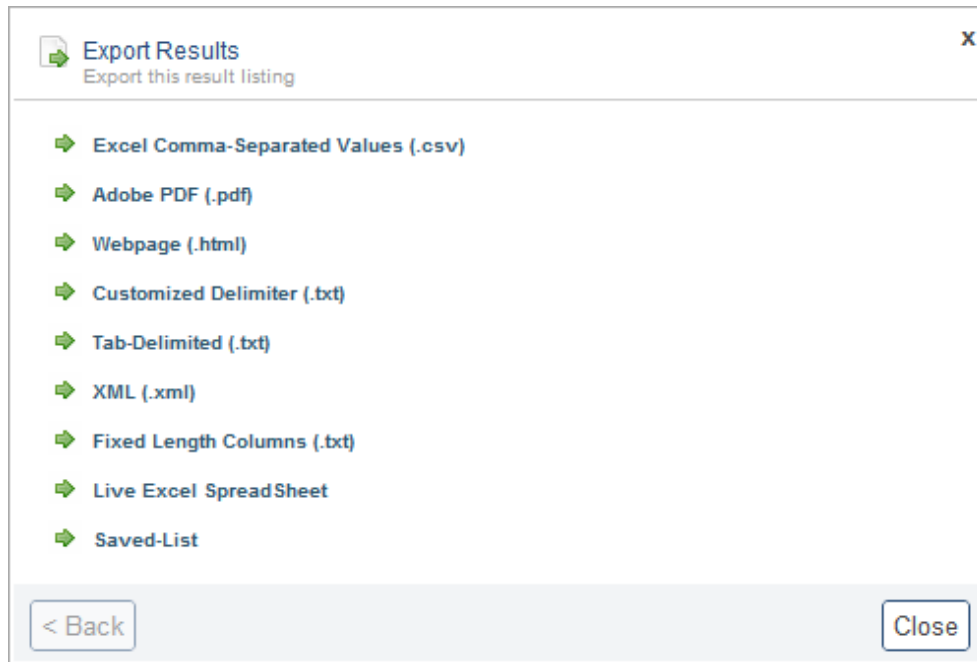
Launch Report

Report Results

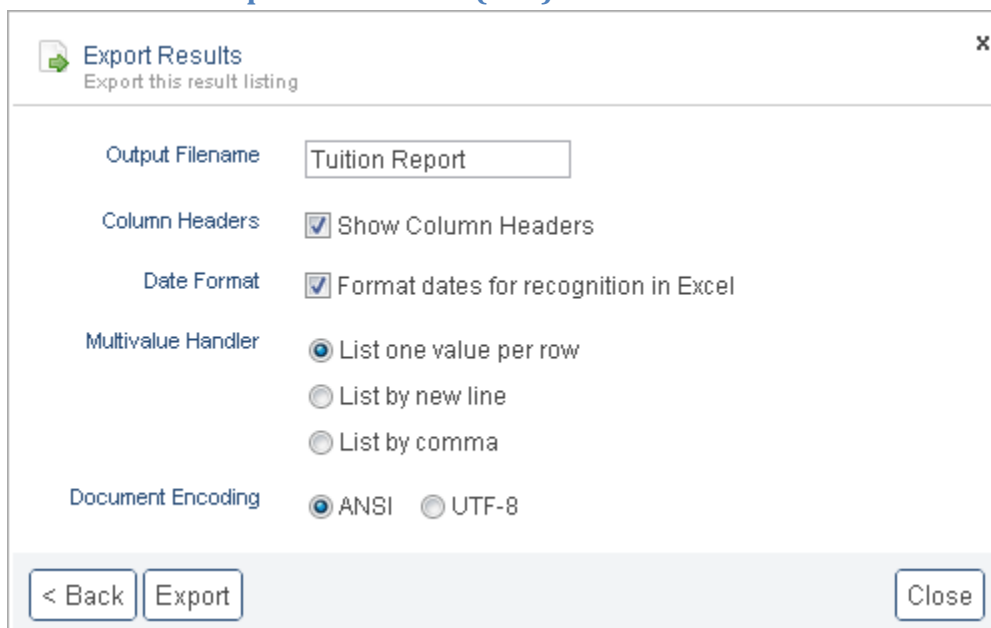
Refresh Clear Filter Drag columns here to group

Student Name	Term	Address	Home Number	Amount Due	Amount Paid	Balance	2/3 Remaining	Difference
EDWARDS, ETHAN ALFRED	SP2007	302 CROSSROADS VALLEY STREET, Billings, MT	(877) 663-364	\$500.00	\$374.00	\$126.00		\$126
EDWARDS, ETHAN ALFRED	SU2007	302 CROSSROADS VALLEY STREET, Billings, MT	(877) 663-364	\$500.00	\$307.00	\$193.00	< 1/3 Paid	\$193
EDWARDS, ETHAN ALFRED	SU2009	302 CROSSROADS VALLEY STREET, Billings, MT	(877) 663-364	\$500.00	\$57.00	\$443.00	< 1/3 Paid	\$443
EDWARDS, ETHAN ALFRED	FA2005	302 CROSSROADS VALLEY STREET, Billings, MT	(877) 663-364	\$500.00	\$499.00	\$1.00		\$1
EDWARDS, ETHAN ALFRED	FA2006	302 CROSSROADS VALLEY STREET, Billings, MT	(877) 663-364	\$500.00	\$282.00	\$218.00	< 1/3 Paid	\$218
EDWARDS, ETHAN ALFRED	FA2009	302 CROSSROADS VALLEY STREET, Billings, MT	(877) 663-364	\$500.00	\$314.00	\$186.00	< 1/3 Paid	\$186

Next, choose the format to which to export the report.



Excel Comma-Separated Values (.csv)



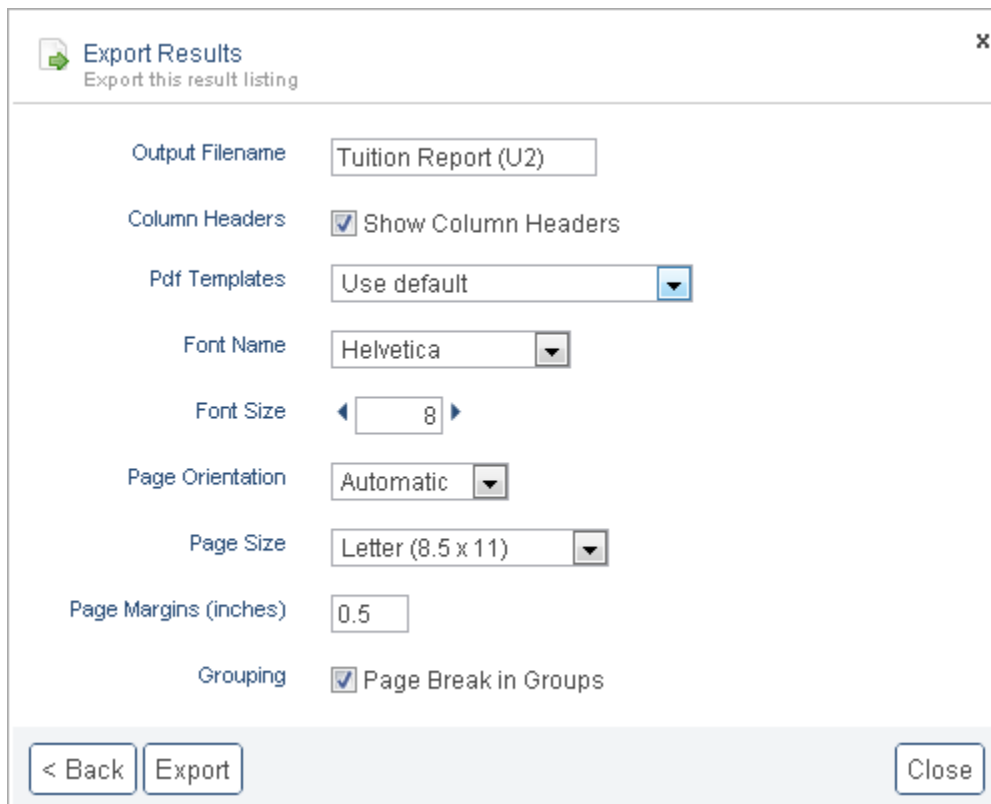
Choose the appropriate settings for the spreadsheet:

- If you wish to rename the CSV file, enter the appropriate filename.
- To remove the column headings, uncheck the "Show Column Headers" box.

- To maintain the original formatting of dates in the report, uncheck the “Format dates for recognition in Excel” option. Leave this checked to convert the dates to a format recognized by Excel.
- For fields that are multivalued (U2 datasources only), choose how the values should be listed.
 - List one value per row – multivalues are exploded into separate rows in the Excel report.
 - List by new line – multivalues are listed in a single cell.
 - List by comma – Multivalues are listed in a single cell, separated by commas.
- If you are working on a system that requires UTF-8 document encoding, select the appropriate coding method.

Click the Download Now button to download the spreadsheet.

Adobe PDF



The screenshot shows a dialog box titled "Export Results" with a subtitle "Export this result listing". It contains several settings for PDF export:

- Output Filename:** A text box containing "Tuition Report (U2)".
- Column Headers:** A checkbox labeled "Show Column Headers" which is checked.
- Pdf Templates:** A dropdown menu showing "Use default".
- Font Name:** A dropdown menu showing "Helvetica".
- Font Size:** A spinner box showing the value "8".
- Page Orientation:** A dropdown menu showing "Automatic".
- Page Size:** A dropdown menu showing "Letter (8.5 x 11)".
- Page Margins (inches):** A text box containing "0.5".
- Grouping:** A checkbox labeled "Page Break in Groups" which is checked.

At the bottom of the dialog, there are three buttons: "< Back", "Export", and "Close".

Choose the appropriate settings for the PDF document:

- If you wish to rename the PDF file, enter the appropriate filename.
- To remove the column headings, uncheck the “Show Column Headers” box.
- PDF Templates allow you to specify how you want the PDF formatted, such as margins, default headings, font settings, watermarks, etc. Templates are discussed in the administrative portion of the training session.
- To change the font settings, select the font name and size to be used in the report.

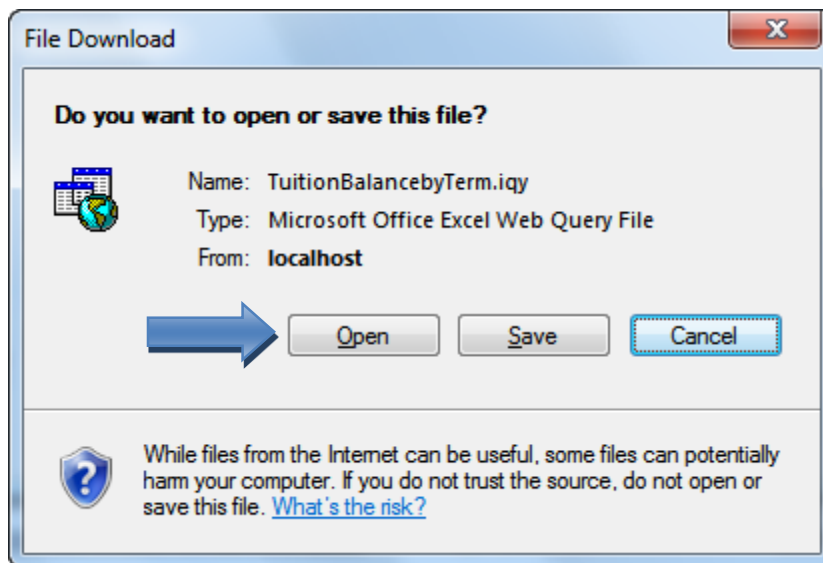
- Informer can automatically adjust the page orientation depending on the amount of data listed in the report, or you can specify landscape or portrait layout.
- Adjust the page size and margins to the appropriate values.
- To force a page break before each new group in the document, leave the “Page Break in Groups” checked. Uncheck this option to remove the page break.

Click the Download Now button to download the PDF document.

Live Excel

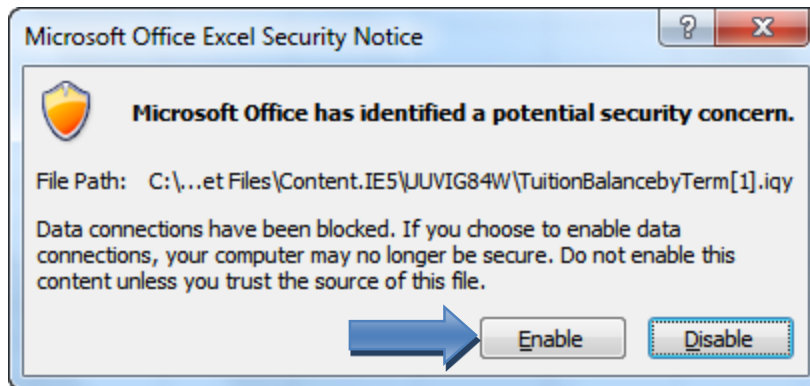
A Live Excel allows you to generate Informer reports from within Excel. You do not need to have a login to Informer in order to use a Live Excel spreadsheet once it has been created. The report is run in Informer as the user who created the Live Excel file. Each time you access the Live Excel spreadsheet, the data on the report can be refreshed. It will also prompt you for any parameters required by the report when first opened.

When you click on the Live Excel export link, you will be prompted to save or open the file.



The window that appears may be different depending on the operating system and browser that you are using.

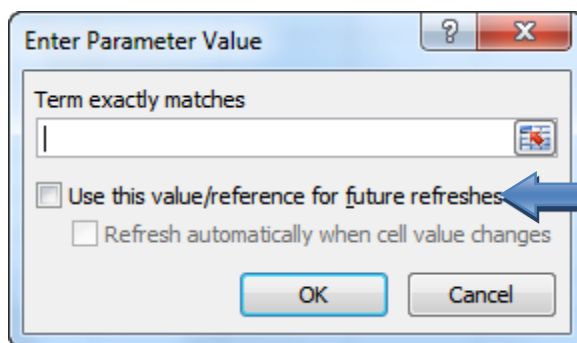
Click Open to start Excel. Depending on your security settings, you may see a warning window appear.



The window that appears may be different depending on the operating system and Office version that you are using.

Click Enable to allow the data connection to be established.

If the report was set up to prompt the user for parameters, Excel will ask for the parameters as well. Regardless of whether they were required in Informer, you are always required to enter a value for parameters in Excel.

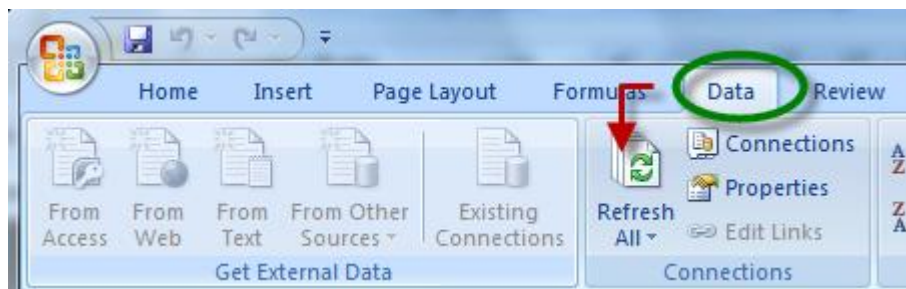


If you want to use the same value each time you open the Live Excel spreadsheet, check the box for "Use this value/reference for future refreshes". You will no longer be prompted for the parameter.

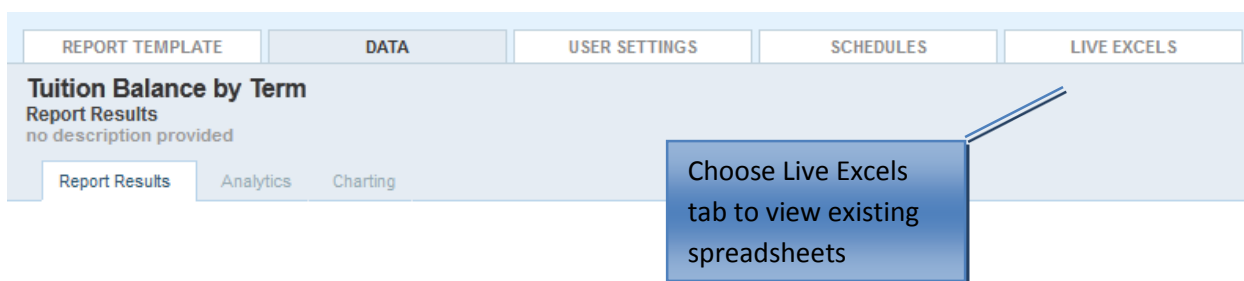
Excel will generate the report and populate the worksheet with the data.

	A	B	C	D	E	F	G	H	I	J
1	Student Name	Term	Address	Home Number	Amount Due	Amount Paid	Balance	2/3 Remaining	Difference	
2	STOLL, GONZALO AUGUSTINE	FA2007	38 KENNONDALE DRIVE, Gilbert, AZ	(623) 737-215	\$1,500.00	\$407.00	\$1,093.00		\$1,093	
3	CRUTCHER, MILO FRANKLYN	FA2007	83 CHESTONE BOULEVARD, Peoria, AZ	(984) 777-321	\$500.00	\$132.00	\$368.00		\$368	
4	CARRANZA, BENTON MARCOS	FA2007	341 BRED A BOULEVARD, Scottsdale, AZ	(737) 641-133	\$500.00	\$253.00	\$247.00		\$247	
5	SAUCEDO, ANTONIO BERNARD	FA2007	321 BOSCAWEN COURT, Chandler, AZ	(837) 123-281	\$500.00	\$389.00	\$111.00		\$111	
6	HERRICK, IGNACIO ARMANDO	FA2007	423 CARPENTER GLENN ROAD, Chandler, AZ	(489) 972-368	\$1,000.00	\$648.00	\$352.00		\$352	
7	TILTON, LEE BEULAH	FA2007	381 GLEN MILL DRIVE, Peoria, AZ	(216) 463-417	\$500.00	\$27.00	\$473.00		\$473	
8	GORMAN, ERVIN VIRGILIO	FA2007	156 GIVERNY STREET, Tempe, AZ	(979) 768-236	\$500.00	\$236.00	\$264.00		\$264	
9	COFFEY, DEENA REYNA	FA2007	172 WESTOVER HILLS ROAD, Scottsdale, AZ	(275) 976-796	\$1,000.00	\$299.00	\$701.00		\$701	
10	HORST, KENTON ANDREAS	FA2007	269 EVANS HIRE DRIVE, Phoenix, AZ	(667) 251-424	\$500.00	\$260.00	\$240.00		\$240	
11	NEUMAN, HEIDI DELLA	FA2007	46 APEX MORRISVILLE COURT, Glendale, AZ	(759) 329-345	\$500.00	\$325.00	\$175.00		\$175	
12	HANDY, MARJORIE DIANN	FA2007	63 SMITHDALE LANE, Scottsdale, AZ	(513) 485-194	\$500.00	\$10.00	\$490.00		\$490	
13	KEYSER, CRISTOPHER CLEO	FA2007	341 DECOURLEY COURT, Phoenix, AZ	(873) 249-841	\$500.00	\$265.00	\$235.00		\$235	
14	YOO, MARCELO COLTON	FA2007	361 FARM GATE COURT, Peoria, AZ	(228) 343-667	\$500.00	\$428.00	\$72.00		\$72	
15	HOLMES, ROSANNE MARCI	FA2007	298 CHAPEL HILL BOULEVARD, Phoenix, AZ	(944) 716-746	\$500.00	\$216.00	\$284.00		\$284	
16	BAUMAN, MYRON FLORENCIO	FA2007	389 CHATHAM ROAD, Scottsdale, AZ	(927) 386-343	\$500.00	\$429.00	\$71.00		\$71	
17	CORNWELL, TINA MAUREEN	FA2007	47 SILVER MOON STREET, Glendale, AZ	(322) 463-145	\$1,000.00	\$749.00	\$251.00		\$251	
18	RENDON, DANILO CODY	FA2007	487 CIRCLE ON THE ROAD, Mesa, AZ	(779) 253-225	\$500.00	\$488.00	\$12.00		\$12	
19	ALLARD, DOREEN JANET	FA2007	487 LAKE RALEIGH ROAD, Phoenix, AZ	(493) 749-544	\$1,000.00	\$589.00	\$411.00		\$411	
20	STOWERS, PATRICIA BARTON	FA2007	353 BRECKENWOOD COURT, Peoria, AZ	(491) 252-148	\$500.00	\$53.00	\$447.00		\$447	
21	YOO, OLEN TERRELL	FA2007	247 HIDDEN TREE LANE, Peoria, AZ	(472) 859-222	\$500.00	\$239.00	\$261.00		\$261	
22	DORTCH, KASEY CATHLEEN	FA2007	203 SPRINGFORK COURT, Chandler, AZ	(432) 286-141	\$1,000.00	\$686.00	\$314.00		\$314	
23	KILPATRICK, ROBYN CELIA	FA2007	260 WALMSLEY BOULEVARD, Scottsdale, AZ	(837) 295-487	\$500.00	\$131.00	\$369.00		\$369	
24	FRAME, AMALIA RENE	FA2007	98 WAYBRIDGE ROAD, Mesa, AZ	(387) 725-319	\$500.00	\$225.00	\$275.00		\$275	

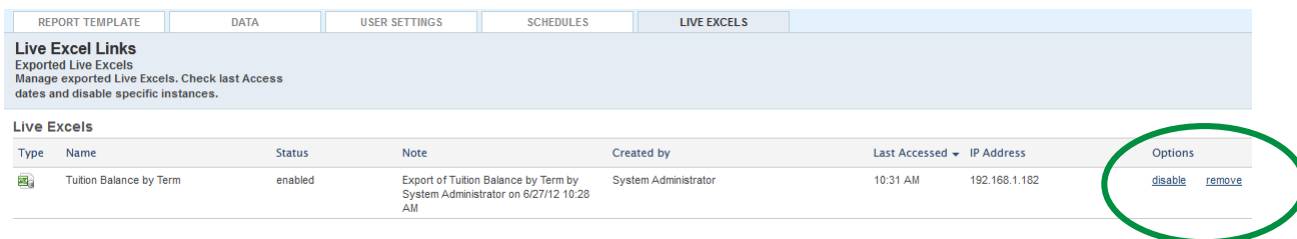
You can save the spreadsheet for later use. If the data on the report has changed, you can either re-open the spreadsheet, or with the spreadsheet open, click on the Data tab and choose Refresh All.



Live Excel exports are tracked and may be enabled/disabled or removed without modifying the report. When in the report, click on the Live Excls tab to see the existing spreadsheets.



You have the option to disable or remove the Live Excel spreadsheet from this screen.

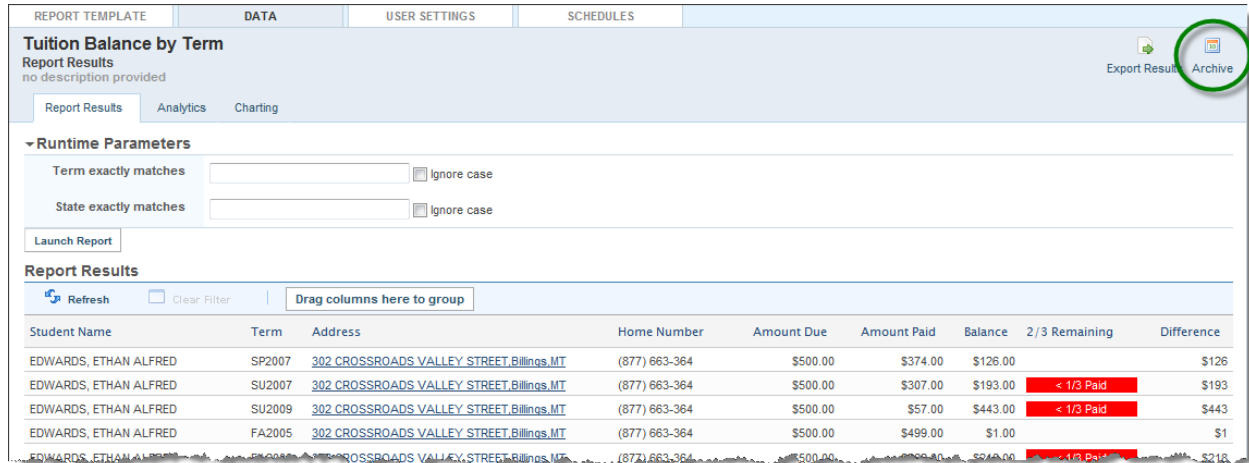


Archiving

Archiving allows you to create a snapshot of a report at that moment in time. The report results are stored on the Informer server. Access to the archives, as well as what data can be viewed on the archived report, is controlled by group and user security settings. Any security set on the report does not automatically carry over to the archive. Archives maintain their access security apart from the original report.

Creating an Archive

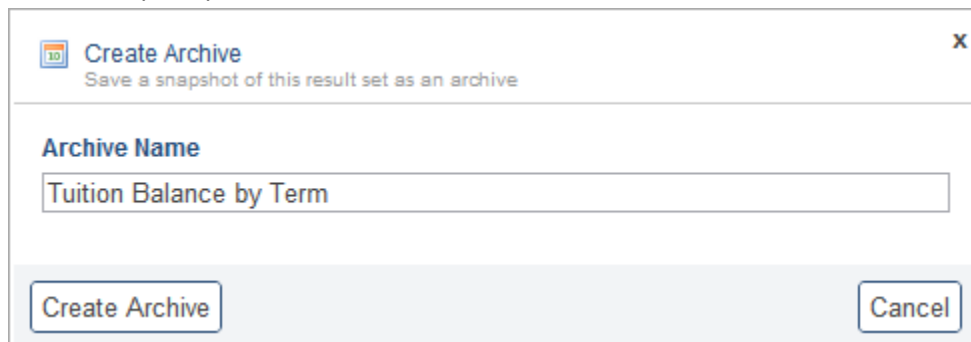
To create an archive of a report, click on the Archive link while viewing the report results.



The screenshot shows the 'Tuition Balance by Term' report interface. At the top, there are tabs for 'REPORT TEMPLATE', 'DATA', 'USER SETTINGS', and 'SCHEDULES'. Below these, the report title 'Tuition Balance by Term' is displayed, followed by 'Report Results' and 'no description provided'. On the right side, there are two buttons: 'Export Results' and 'Archive', with the 'Archive' button circled in green. Below the report title, there are tabs for 'Report Results', 'Analytics', and 'Charting'. Under the 'Report Results' tab, there are 'Runtime Parameters' for 'Term' and 'State', each with a text input field and an 'Ignore case' checkbox. A 'Launch Report' button is also present. The main section is titled 'Report Results' and contains a table with columns: 'Student Name', 'Term', 'Address', 'Home Number', 'Amount Due', 'Amount Paid', 'Balance', '2 / 3 Remaining', and 'Difference'. The table lists four rows of data for 'EDWARDS, ETHAN ALFRED' across different terms (SP2007, SU2007, SU2009, FA2005). The '2 / 3 Remaining' column shows a red bar and the text '< 1/3 Paid' for the last three rows.

Student Name	Term	Address	Home Number	Amount Due	Amount Paid	Balance	2 / 3 Remaining	Difference
EDWARDS, ETHAN ALFRED	SP2007	302 CROSSROADS VALLEY STREET, Billings, MT	(877) 663-364	\$500.00	\$374.00	\$126.00		\$126
EDWARDS, ETHAN ALFRED	SU2007	302 CROSSROADS VALLEY STREET, Billings, MT	(877) 663-364	\$500.00	\$307.00	\$193.00	< 1/3 Paid	\$193
EDWARDS, ETHAN ALFRED	SU2009	302 CROSSROADS VALLEY STREET, Billings, MT	(877) 663-364	\$500.00	\$57.00	\$443.00	< 1/3 Paid	\$443
EDWARDS, ETHAN ALFRED	FA2005	302 CROSSROADS VALLEY STREET, Billings, MT	(877) 663-364	\$500.00	\$499.00	\$1.00	< 1/3 Paid	\$1

You will be prompted to enter a name for the Archive.



The screenshot shows a 'Create Archive' dialog box. At the top, there is a title bar with a close button (X). Below the title bar, the text 'Create Archive' is displayed, followed by the subtitle 'Save a snapshot of this result set as an archive'. The main section is titled 'Archive Name' and contains a text input field with the value 'Tuition Balance by Term'. At the bottom, there are two buttons: 'Create Archive' and 'Cancel'.

The name defaults to the title of the report. Change the name accordingly and click "Create Archive". Informer will create an archive of the report, which can be accessed from the Archives tab on the Informer landing page.

Home Reports Archives Home

REPORTS ARCHIVES

Data Archives Home
Data Archive Dashboard
View your data archives

Filter Archives

By Datasource

- All Datasources 4
- College ERP 4

By Tag

- All Tags 4
- (empty) 1
- Financials 3
- Person 3
- Tuition 3

Archives Listing

Search Archives On selected archives...

Archive Title	Date Created	Created By	Record Count	Size
Friday's tuition report	5/28/10 10:38 AM	administrator	3180	696 KB
Tuition Balance by Term	6/21/10 10:06 PM	administrator	3213	1739 KB
Tuition Balance by Term	6/17/10 10:31 AM	administrator	15	28 KB
Tuition Balance by Term	6/1/10 5:11 PM	administrator	115	82 KB

Refresh

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

The archives listing will display all the archives, to which you have access, as well as the date the archive was created, the person who created it, the number of records on the report, and the size of the archive file. To view an archive, click on the appropriate archive title.

Tuition Balance by Term
Archived Dataset
Created by administrator Jun 21, 2010 10:06:10 PM

Permissions Export Delete

Data Analytics Charting

Report Results

Clear Filter Drag columns here to group

Student Name	Term	Address	Home Number	Amount Due	Amount Paid	Balance	2/3 Remaining	Difference
AARON, BENTON JARRETT	FA2007	340 DUTCHESS LANE, Hollywood, FL	(115) 385-912	\$500.00	\$277.00	\$223.00	< 1/3 Paid	\$223.00
ABBOTT, WENDY ANGELIA	FA2007	468 MACINTYRE COMMONS COURT, Baton Rouge, LA	(846) 624-452	\$500.00	\$223.00	\$277.00	< 1/3 Paid	\$277.00
ABERNATHY, NONA MARGUERITE	FA2007	300 MOSS OAK BOULEVARD, Atlanta, GA	(635) 893-345	\$500.00	\$79.00	\$427.00	< 1/3 Paid	\$427.00
ABNEY, DOYLE JEFFEREY	FA2007	216 STONEMOOR DRIVE, Akron, OH	(344) 176-825	\$1,000.00	\$803.00	\$197.00		\$197.00
ABNEY, ROBBIE ROBBIE	FA2007	442 SWALLOW LANE, Pembroke Pines, FL	(276) 756-829	\$500.00	\$79.00	\$421.00	< 1/3 Paid	\$421.00
ABRAHAM, DION REX	FA2007	290 BURGWIN WRIGHT DRIVE, Hayward, CA	(359) 941-116	\$500.00	\$408.00	\$92.00		\$92.00
ABREU, JOANN BERNADINE	FA2007	18 HUNTSWORTH STREET, Boise, ID	(385) 477-975	\$500.00	\$214.00	\$286.00	< 1/3 Paid	\$286.00
ACKLEY, SHEENA AVA	FA2007	295 POPLAR BRANCH COURT, Akron, OH	(975) 342-691	\$500.00	\$148.00	\$352.00	< 1/3 Paid	\$352.00
ACUNA, ERIN CALEB	FA2007	253 KENNONDALE DRIVE, Hialeah, FL	(973) 362-821	\$500.00	\$242.00	\$258.00	< 1/3 Paid	\$258.00
ADAM, GAYLE NATHANIEL	FA2007	205 SWANSBORO LANE, Raleigh, NC	(476) 236-586	\$500.00	\$215.00	\$285.00	< 1/3 Paid	\$285.00
ADAMS, BOBBIE WILLARD	FA2007	4 ASHMORE BOULEVARD, Garden Grove, CA	(615) 498-717	\$500.00	\$447.00	\$53.00		\$53.00

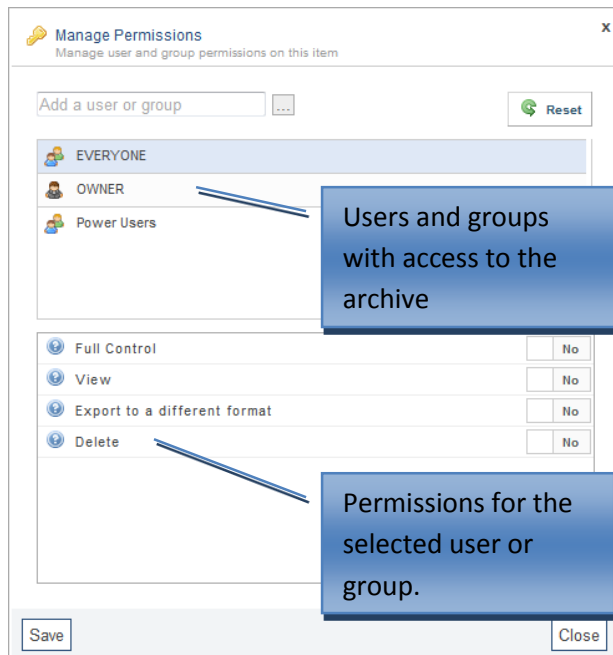
Permissions Export Delete

Depending on the level of security you have been given for archives, you can share, export, or delete the archive.

You can also perform analytics and charting on the archived report. These features are covered later in the training guide.

Sharing an Archive

To specify who can view the archive, click on the Permissions link.

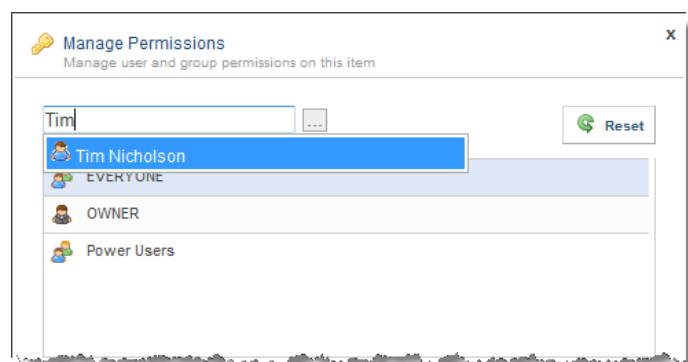


You must have Full Control access to all archives or the specific archive in order to set permissions.

Access can be given to individual users or to groups of users. Permissions control what the user or group can do with the archive.

- Full control – the user or group has full access and control over the archive. This includes setting or modifying access permissions, viewing, exporting and deleting the archive.
- View – the user or group can view the archived report results.
- Export to a different format – the user or group can export the archive report results to any of the export formats.
- Delete – the user or group can delete the archived report results.

To add a user or group to the list, start typing the user or group name in the input box. Informer's auto-complete feature will start listing users and groups that contain what you type. Click on the user or group name to add them to the list.



Or, click the ellipsis next to the input box to open the search window. Enter the search parameters, choose whether you want to search for Users, Groups, or both, and click the Search button. Informer will list the users and/or groups that match your criteria. Double-click the name you wish to add to the list. Click the Close button on the search window to return to the permissions window, or you can search for and add additional users or groups.

To change the default permission, click the Yes/No next to the appropriate access. In this example we have explicitly denied access to export the archive reports, while retaining the default permission to view and delete the archive.

Full Control	<input type="checkbox"/>	No
View	<input checked="" type="checkbox"/>	Yes
Export to a different format		No
Delete	<input checked="" type="checkbox"/>	Yes



The padlock indicates that the default permission has been overridden.

For a more detailed explanation of security and permission settings, see the Security section of the training manual.

Click the Save button to save the permission settings, or click Cancel to undo any changes.

Analytics

The analytics feature of Informer allows you to summarize and aggregate the data on your report in a pivot table like format. This tool becomes especially useful when you need to create summaries of data in a very large report. The analytics data can be sorted, arranged, exported, and archived like any other report.

To access the analytics page, click on the Analytics tab while viewing report results or an archived report.

Tuition Balance by Term
Report Results
no description provided

Report Results **Analytics** Charting

Analytics
☐ Clear Filter
Check fields and aggregate functions to display summary data.
Refresh

Records 1 through 25 of 45 Display Paged First Previous Page 1 of 2 Next Last Display All

2/3 Remaining ☐
Address ☐
Amount Due ☐
Total ☐
Average ☐
Maximum ☐
Minimum ☐
Amount Paid ☐
Total ☐
Average ☐
Maximum ☐
Minimum ☐
Balance ☐

Numeric fields have aggregate functions listed beneath them.

On the left side of the analytics panel is the list of fields used on the report, regardless of whether they are visible or hidden. Numeric fields can be aggregated into totals, averages, minimums and maximums.

To add a column to the report, click the checkbox next to the field. Informer will list the unique values from the column. We have selected the State column, and in the analytics panel, Informer has listed the unique State codes from the report.

Last Name ☐
Middle Name ☐
State ☒
Street Address ☐
Student Name ☐
Term ☐
Tuition ID ☐
Total ☐
Average ☐
Maximum ☐
Zip Code ☐
Count ☐

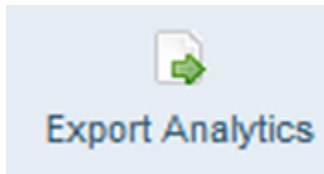
Analytics
☐ Clear Filter
State
AK
AL
AR
AZ
CA
CO
CT
DC
GA
HI

To add an aggregate value, click the checkbox next to the appropriate function. In our example, we want the total and average of the Balance field for each state.

Balance	<input type="checkbox"/>
Total	<input checked="" type="checkbox"/>
Average	<input checked="" type="checkbox"/>
Maximum	<input type="checkbox"/>
Minimum	<input type="checkbox"/>

Analytics		
<input type="checkbox"/> Clear Filter		
State	Balance (Total)	Balance (Avg)
AK	\$43,309.00	\$304.99
AL	\$237,159.00	\$288.51
AR	\$43,713.00	\$303.56
AZ	\$479,458.00	\$290.76
CA	\$3,420,772.00	\$298.68
CO	\$457,679.00	\$298.55
		\$294.68
		\$312.05
FL	\$972,703.00	\$300.03

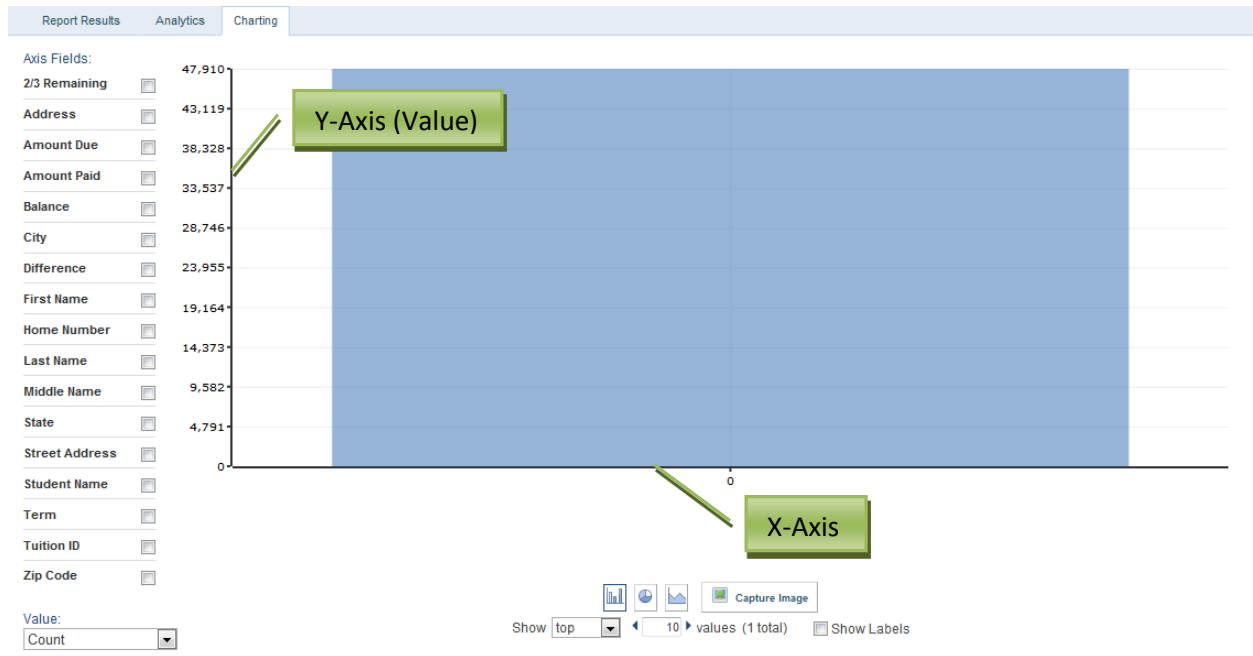
To export the analytic report, click on Export Analytics link.



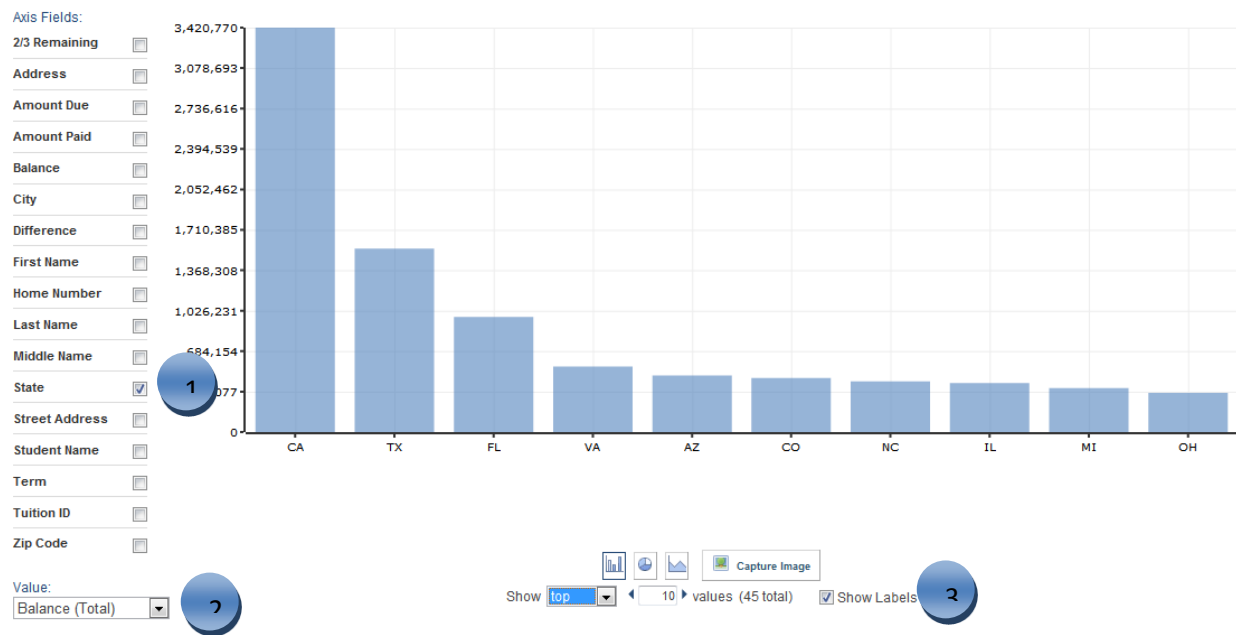
Fields that are hidden on the report will not export, even though they are available in the analytics panel.

Charting

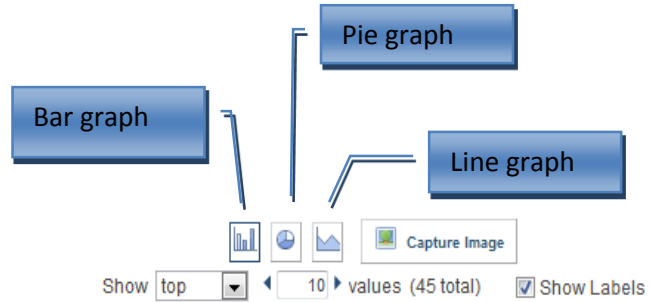
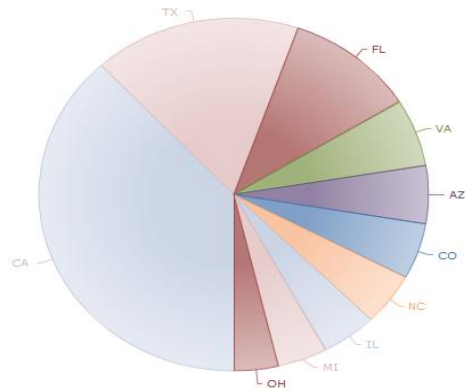
Charting works in much the same way as analytics, except the output is in chart form instead of report form.



The default chart shows a total count of the records on the report. To choose the field that will be used on the X-axis of the report, click the checkbox by the appropriate field. Then, in the Value dropdown, choose the field and aggregate function to be used for the Y-axis.



Informer provides for 3 different chart formats: bar, pie, and line.

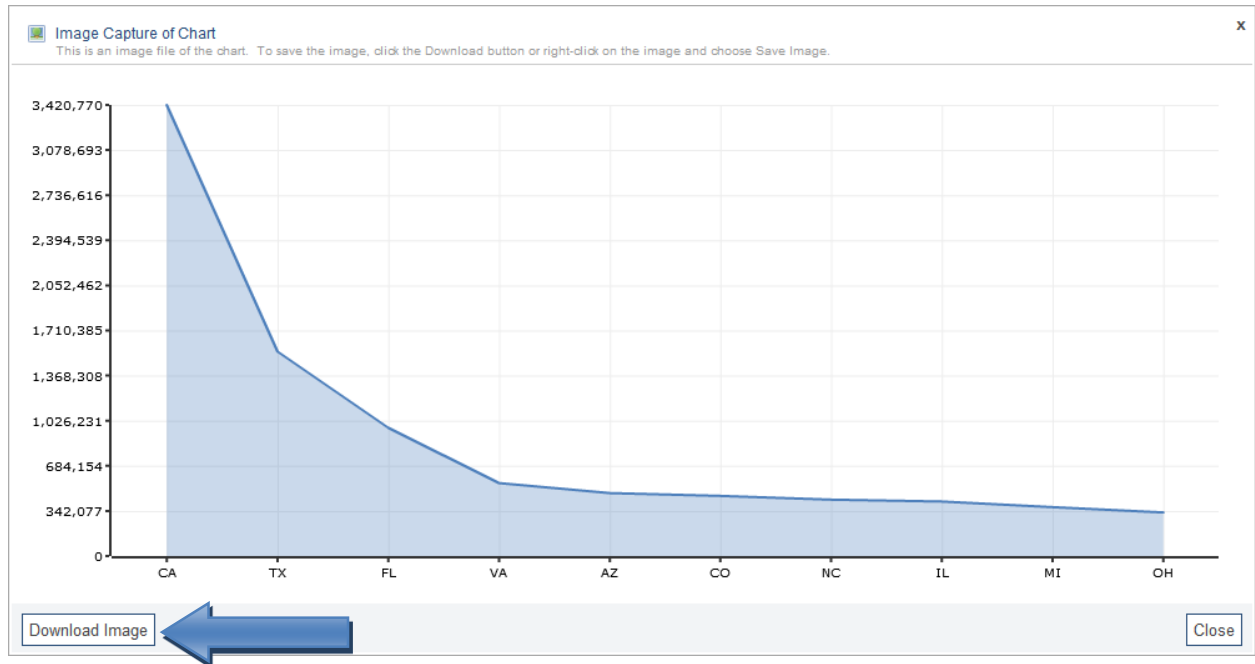


Click the appropriate chart type to change the chart. By default, Informer will display the top 10 values in the chart. To adjust this setting, change the number of values to display, or change the dropdown from Top to either All or Bottom.

Show top 10 values (45 total)

top
bottom

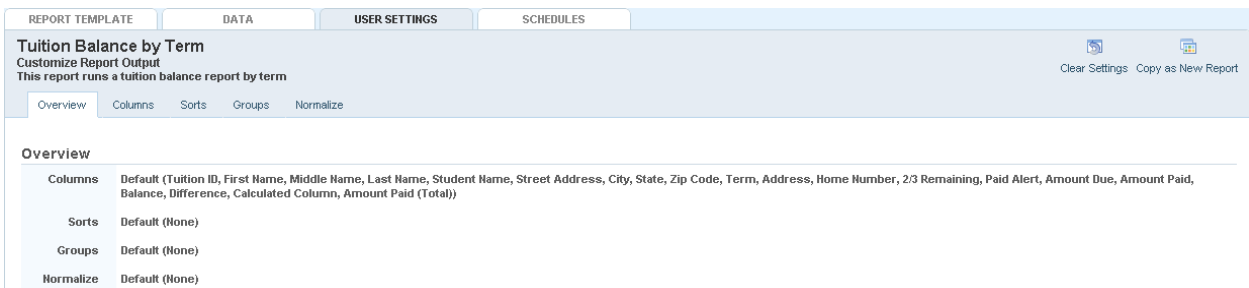
You can save the chart image in PNG format for use in publications or websites. Click Capture Image to create an image of the chart.



Click on the Download Image button to save the file. Once you have finished downloading the image, click the Close button.

User Settings

User settings allow you to customize a report for your own personal preferences. You can add and remove columns from a report, and set sorting, grouping, and normalizing options as well, without affecting the base report definition.




We will cover columns, sorts, groups, and normalizing in the report creation section.

Once user settings have been applied, you will see a banner at the top of the report definition.

Tuition Balance by Term

College ERP Report



This report runs a tuition balance report by term

 User settings applied.



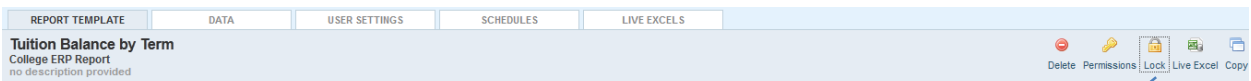
Once you have applied your user settings, any change to the report template will not be reflected in your report. Changes made to the template will also need to be made to your user settings.

This indicates that you have made your own custom version of the report in the user settings tab.

If you wish to make your version of the report available to others, create a new report from your user settings using the  Copy as New Report option. Or, you can clear your user settings using the  Clear Settings option.

Locking Report

Informer also allows the owner of the report the ability to lock the report so that no other users can make changes except if they are using User Settings. Depending on the security permissions given to the user, they may not be able to make changes either way. To lock the report, click on the on padlock icon in the upper right hand corner of the report template page.



Lock Icon

The below message will appear on a report when it has been locked by the owner of the report.

Tuition Balance by Term

College ERP Report

no description provided

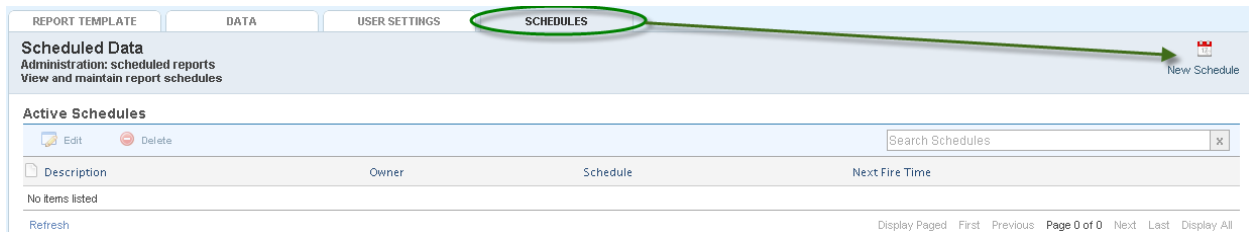


This report is locked.

Overview

Scheduling

The Informer scheduler allows you to run a report on a recurring basis, or one time, offline. To schedule a report, go to the schedules tab and click New Schedule.



Setting the Schedule: When and How Often

The first tab on the schedule window allows you to set the actual schedule for the report – when and how often you want to run the report.

A screenshot of the 'Report Schedule' dialog box. The title bar says 'Report Schedule' with a close button. Below the title, it says 'Schedule a report to run at regular intervals'. The dialog is divided into two main sections. The top section shows 'Report: Tuition Balance by Term' and 'Scheduled by: System Administrator'. Below this are five tabs: 'Schedule' (selected), 'Report Parameters', 'Archive', 'Email', and 'Export'. The 'Schedule' tab contains the following fields: 'Description *' with the value 'Tuition Balance by Term'; 'Date Range' with '10/28/11' and 'No end date'; 'Start Time *' with '6:00 AM'; and 'Recurrence *' with radio buttons for 'Once', 'Daily', 'Weekly' (selected), 'Monthly', 'Yearly', and 'Custom'. Under 'Weekly', there are checkboxes for 'Every week on' with 'Monday', 'Wednesday', 'Friday' selected. At the bottom are buttons for 'Save', 'Run Now', 'Delete', and 'Cancel'.

Description

Enter the description for the schedule. The default is the report name.


Date Range

Enter the starting date of when you want the report to begin running. You can optionally enter an end date to stop the report running after the given date.

Start Time

Enter the time you wish to the report to run.

Once: Runs the report one time.

 *Be sure not to schedule reports during your database maintenance. If the database is down for maintenance, the report will not run.*

Daily: Runs the report every *n* days, or every weekday.

Weekly: Runs the report on specific days of the week.

Monthly: Run the report on a specific day of the month (the 1st, 15th, 30th, etc) or on an occurrence of a day (first Tuesday, last Friday, etc.).

Yearly: Run the report every year on a specific date.

Custom: Use a cron expression to specify the report schedule.

Report Parameters

If the report prompts for filter criteria or a mapping suite table, you will also need to provide the report parameters for the scheduler to use.

Scheduled Output

You can export the scheduled report output to one or more of the following formats.

Archive

Use the Archive tab to export the scheduled report results to an archive.

The screenshot shows the 'Report Schedule' dialog box with the 'Archive' tab selected. The report is 'Tuition Balance by Term' and is scheduled by 'System Administrator'. The 'Archive options' section has two radio buttons: 'Do not create a new archive' (unselected) and 'Create a new archive when' (selected), followed by a numeric input field set to '0' and the text 'or more record(s) are selected'. The 'Archive Name' field contains 'Tuition Balance by Term'. The 'Additional recipients' section has a text input field with 'Add a user or group', a dropdown arrow, and a 'Remove' button. Below this is a list of recipients: 'Power Users', 'Test Group', and 'Test User' (which is selected). At the bottom, there is a checkbox labeled 'Send email when new archives are created.' which is checked. The dialog has 'Save', 'Run Now', and 'Cancel' buttons at the bottom.

Report Schedule
Schedule a report to run at regular intervals

Report: Tuition Balance by Term Scheduled by: System Administrator

Archive Schedule Report Parameters Email Export

Archive options

☐ Do not create a new archive

☒ Create a new archive when 0 or more record(s) are selected

Archive Name: Tuition Balance by Term

Additional recipients: Add a user or group ... Remove


- Power Users
- Test Group
- Test User**

☒ Send email when new archives are created.

Save Run Now Cancel

Archive options: To create an archive, select the “Create a new archive” radio button. You can optionally specify a minimum number of records that have to appear on the report before the report archive is created.

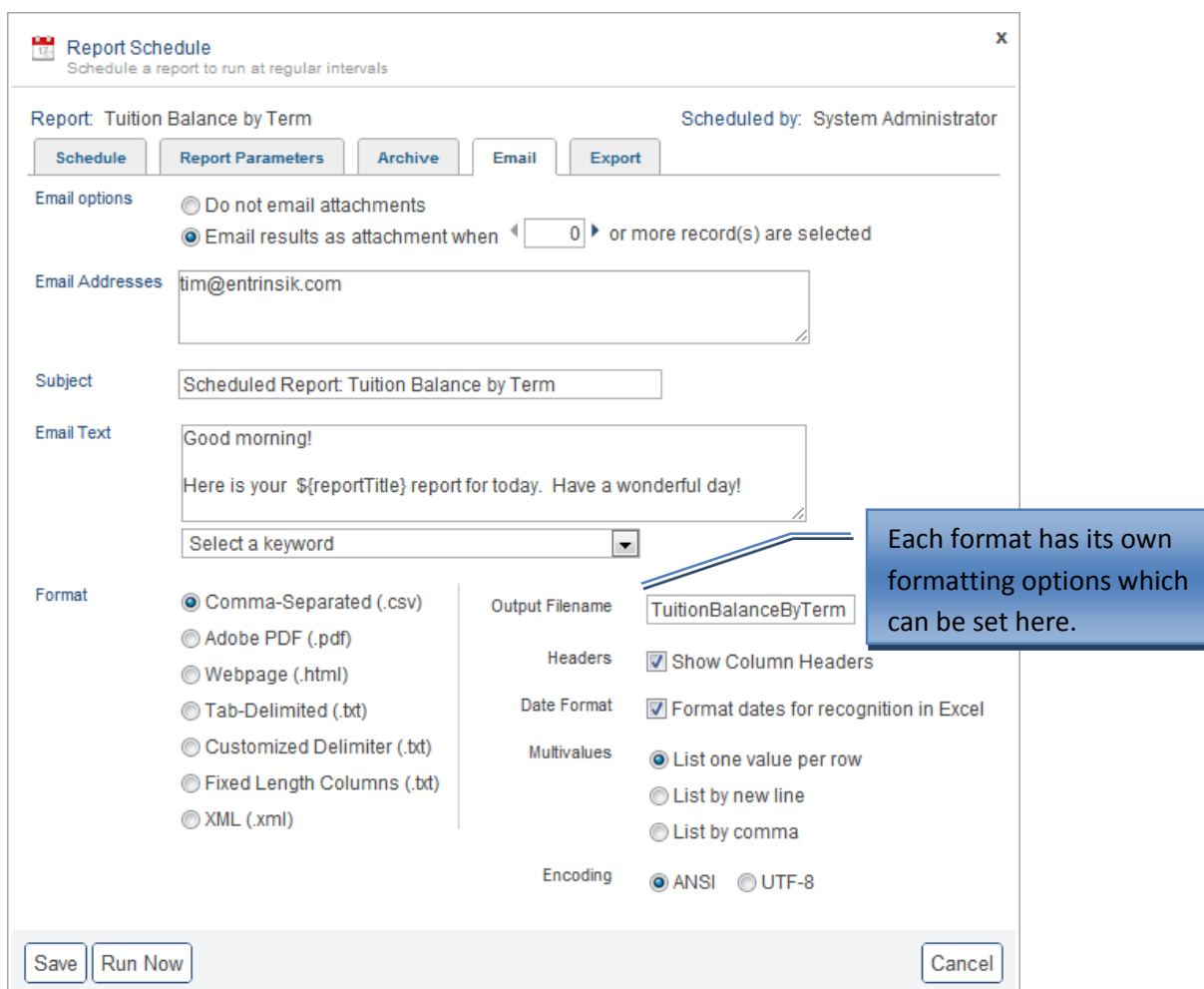
Archive Name: The archive name defaults to the name of the report; however, you can optionally change the name of the archive.

 Archives are never overwritten, regardless of the name.

Additional Recipients: You can share the archive to other users or groups of users. Enter the name of the group or user in the input box, or use the ellipsis box to search for a group or user. You can also optionally send an email to the shared users letting them know a new archive exists.

Email

Report results can also be emailed to any number of recipients.



Report Schedule
Schedule a report to run at regular intervals

Report: Tuition Balance by Term
Scheduled by: System Administrator

Email options

☐ Do not email attachments
☒ Email results as attachment when or more record(s) are selected

Email Addresses

Subject

Email Text

Select a keyword

Format

☒ Comma-Separated (.csv)
☐ Adobe PDF (.pdf)
☐ Webpage (.html)
☐ Tab-Delimited (.txt)
☐ Customized Delimiter (.txt)
☐ Fixed Length Columns (.txt)
☐ XML (.xml)

Output Filename

Headers ☒ Show Column Headers

Date Format ☒ Format dates for recognition in Excel

Multivalues
☒ List one value per row
☐ List by new line
☐ List by comma

Encoding ☒ ANSI ☐ UTF-8

Each format has its own formatting options which can be set here.

Email options: To email the report results, choose the “Email results as attachment” radio button. You can optionally specify a minimum number of records that have to appear on the report before the report results are emailed. This is especially useful for exception reports where you only want to receive an email if an exception is found.

Email addresses: Enter one or more email addresses to receive the report results. Multiple addresses should be separated by a comma.

Subject: Enter the text that will appear in the subject line of the email.

Email Text: Enter the text that will appear in the body of the email. You can insert keywords about the report using the keyword drop-down. Examples of keywords are report title, report description, and number of records on the report.

Format: Choose the format for the email attachment. Additional formatting options for the attachment file can be set to the right of the format list.

Export

The export option allows you to save the report results to a file on the Informer server, or any network server accessible from the Informer server. If the report is using a U2 datasource, you can also create a save list of the ID's from the mapping used for the report.

Report Schedule
Schedule a report to run at regular intervals

Report: Tuition Report (U2) Scheduled by: System Administrator

Export options

☐ Do not export a hard copy

☒ Export a hard copy when 0 or more record(s) are selected

Output File or Folder \\servername\directory\directory\MyExportFile

Saved-List Name MySaveListName

Format

☒ Comma-Separated (.csv)

☐ Adobe PDF (.pdf)

☐ Webpage (.html)

☐ Tab-Delimited (.txt)

☐ Customized Delimiter (.txt)

☐ Fixed Length Columns (.txt)

☐ XML (.xml)

Headers ☒ Show Column Headers

Date Format ☒ Format dates for recognition in Excel

Multivalues

☒ List one value per row

☐ List by new line

☐ List by comma

Encoding ☒ ANSI ☐ UTF-8


Buttons: Save, Run Now, Cancel

Each format has its own formatting options which can be set here.

Export Options: To export the results to a file or save list (U2 only), select the radio button for “Export a hard copy”. You can optionally specify a minimum number of records that have to appear on the report before the report results are exported.

Output File or Folder: Enter the path to and filename of the file to create. The path is relative to the Informer server. See your Informer administrator for help with the path.

Saved-List Name: This option is only available if the report is using a U2-based datasource. Enter the name of the save list to create. The save list will be created in the save list directory under the account path specified on the datasource.

 *Informer does not check to see if the save list exists. It will overwrite any existing save list with the same name.*

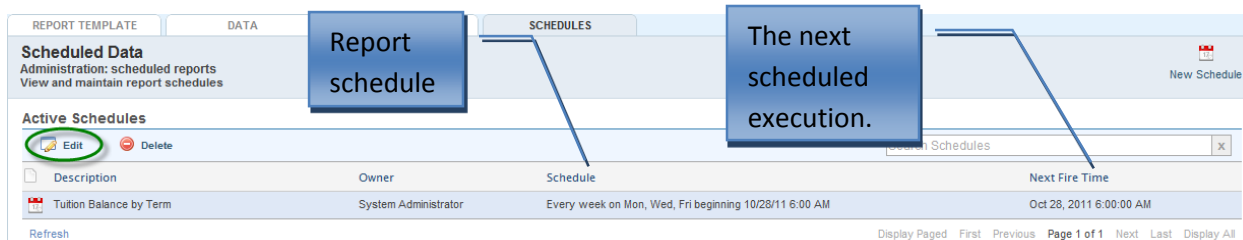
Format: Choose the format for the export file. Additional formatting options for the export file are available to the right of the format list.

Finalizing the Schedule

To save the schedule, click the Save button.

Editing an Existing Schedule



To edit an existing schedule for a report, go to the Schedules tab for the report, highlight the schedule and click Edit.



REPORT TEMPLATE DATA SCHEDULES

Scheduled Data
Administration: scheduled reports
View and maintain report schedules

Active Schedules

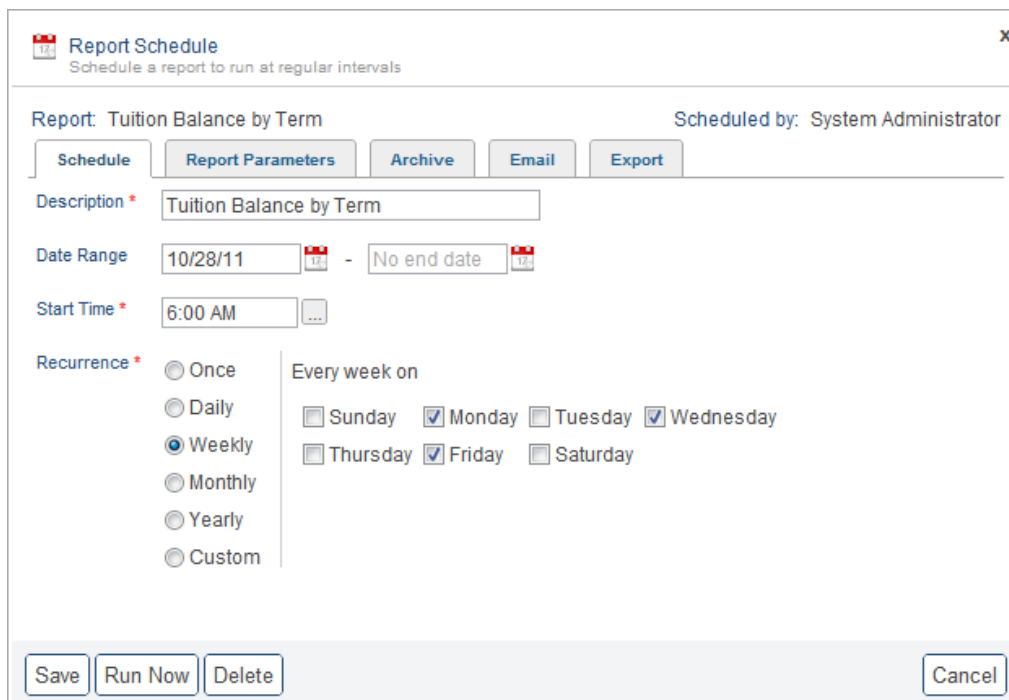
 Edit  Delete

Search Schedules

Description	Owner	Schedule	Next Fire Time
Tuition Balance by Term	System Administrator	Every week on Mon, Wed, Fri beginning 10/28/11 6:00 AM	Oct 28, 2011 6:00:00 AM

Refresh

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



Report Schedule
Schedule a report to run at regular intervals

Report: Tuition Balance by Term Scheduled by: System Administrator

Schedule Report Parameters Archive Email Export

Description * Tuition Balance by Term

Date Range 10/28/11 - No end date

Start Time * 6:00 AM

Recurrence *
☐ Once
☐ Daily
☒ Weekly
☐ Monthly
☐ Yearly
☐ Custom

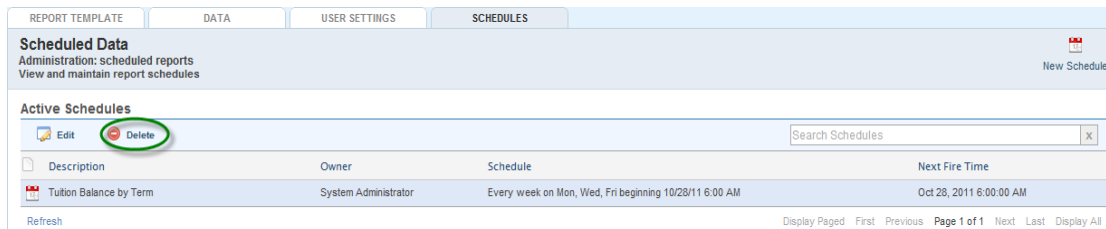
Every week on
☐ Sunday ☒ Monday ☐ Tuesday ☒ Wednesday
☐ Thursday ☒ Friday ☐ Saturday

Save Run Now Delete Cancel

Clicking the Run Now button will execute the schedule immediately while maintaining the Next Fire Time.

Deleting an Existing Schedule

To edit an existing schedule for a report, go to the Schedules tab for the report, highlight the schedule and click Delete.



The screenshot shows a web application interface with a top navigation bar containing tabs: REPORT TEMPLATE, DATA, USER SETTINGS, and SCHEDULES. The SCHEDULES tab is active. Below the navigation bar, there is a header section titled "Scheduled Data" with a subtitle "Administration: scheduled reports" and a description "View and maintain report schedules". A "New Schedule" button is located in the top right corner of this section. Below the header, there is a section titled "Active Schedules". At the top of this section are two buttons: "Edit" and "Delete", with the "Delete" button circled in green. To the right of these buttons is a search bar labeled "Search Schedules". Below the buttons and search bar is a table with the following columns: Description, Owner, Schedule, and Next Fire Time. The table contains one row with the following data: Description: "Tuition Balance by Term", Owner: "System Administrator", Schedule: "Every week on Mon, Wed, Fri beginning 10/28/11 6:00 AM", and Next Fire Time: "Oct 28, 2011 6:00:00 AM". At the bottom left of the interface is a "Refresh" button. At the bottom right is a pagination control showing "Page 1 of 1" and buttons for "Display Paged", "First", "Previous", "Next", "Last", and "Display All".

Description	Owner	Schedule	Next Fire Time
Tuition Balance by Term	System Administrator	Every week on Mon, Wed, Fri beginning 10/28/11 6:00 AM	Oct 28, 2011 6:00:00 AM

Chapter 5: Packages

The easiest way to share reports, settings, and mappings from one Informer to another is with packages. Packages replace Databundles from previous Informer versions, and they are much easier and much more versatile. Like Databundles, using packages is usually restricted to Administrators only.

In This Chapter

In this chapter, we will:

- Import a package
- Create a package of multiple items
- Create a package of a single report

Importing a Package

To import a package, click Import Package (either on the home screen or under Admin > Packages)

The screenshot shows the Informer Admin interface. At the top, there's a navigation bar with 'Reports', 'Mappings', 'Security', and 'Admin' (highlighted with a red box). Below this, there's a sub-navigation bar with 'USER FIELDS', 'CODE FILES', 'DIRECT LINKS', and 'PACKAGES' (highlighted with a red box). A modal window titled 'Informer Package' is open, showing a table of items to be imported and a 'Matches' section for datatypes.

Type	SQL
Mappings	2
Properties	4
Reports	1

Matches

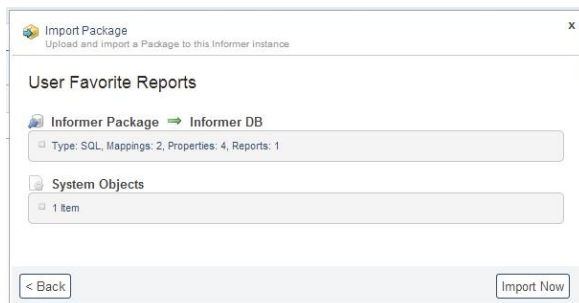
Create New Datasource ▼

< Back Next

You can enter the URL of a package or browse to a package on your computer. Look for an .ixp file type.

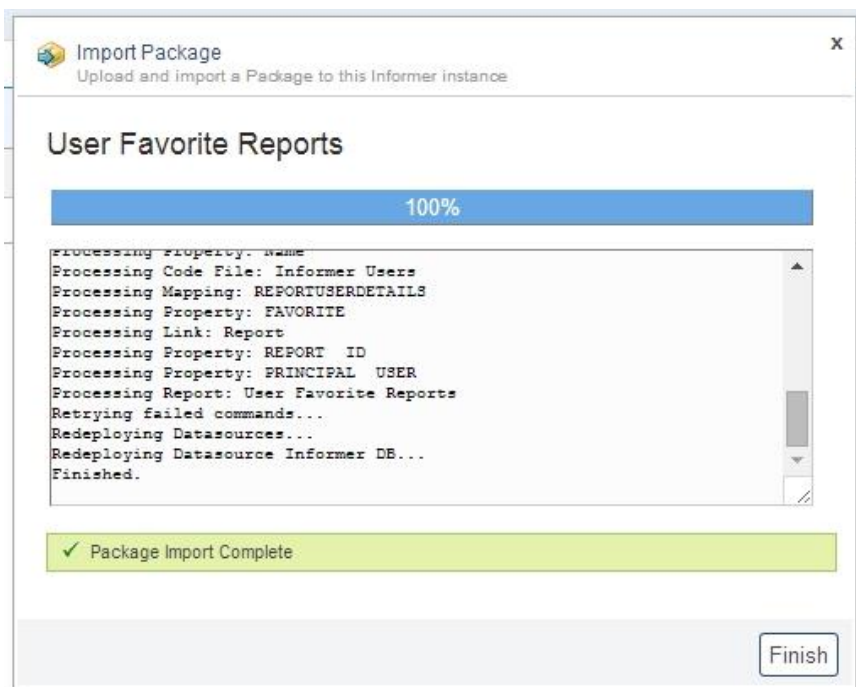
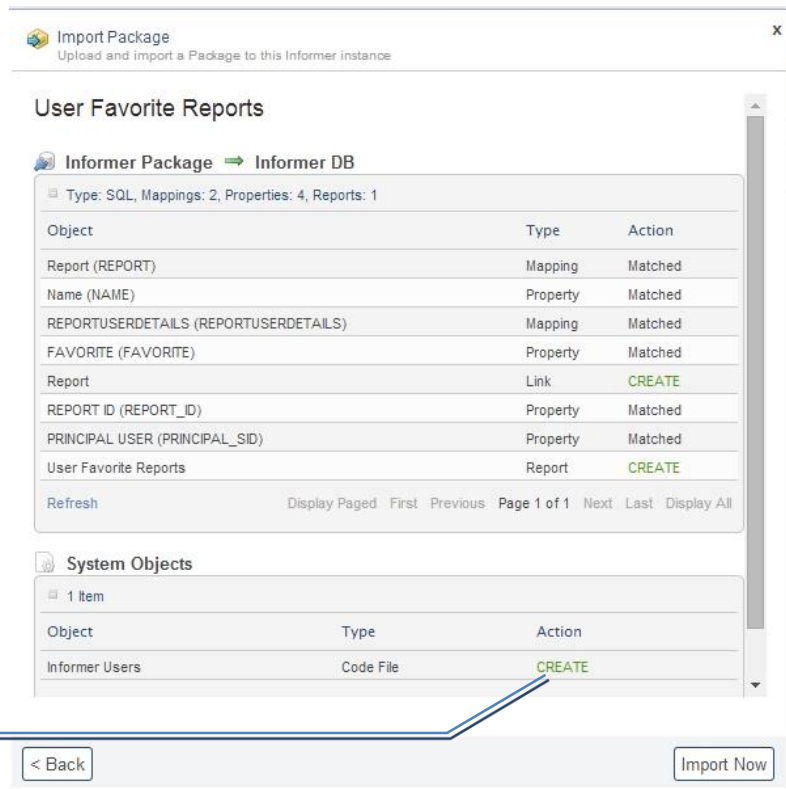
Informer will detect Datasources of the same type that are already defined, or you can map by Datasource.

This is a brief overview of what will be imported



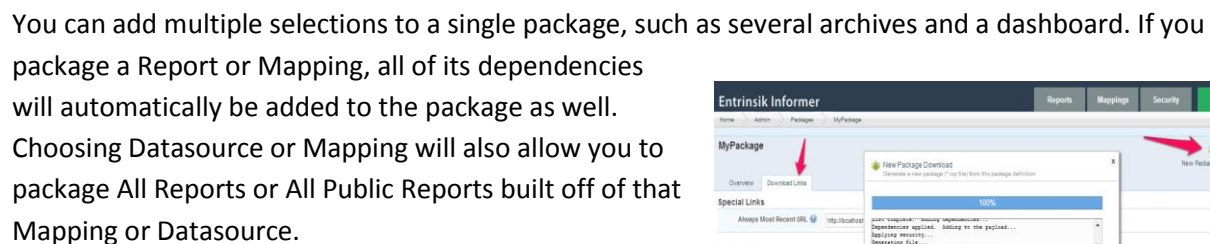
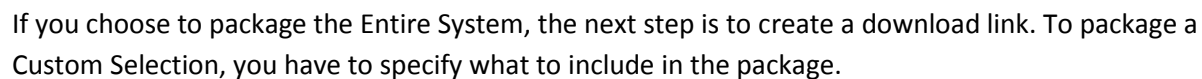
You can preview all of the details of the package, including whether an object already exists in your system or if it will be created. This can be used to check if you are creating a new report or updating an existing report, for instance.

You can see whether this object already exists or will be created.



This window will tell you the status of the package import. Particularly large packages can sometimes take a long time to import. Please be patient.

Creating a package is simple. Under the tabs Admin > Packages is a listing of all the previously created packages. There is also New Package Button (right next to Import Package).



The screenshot shows the 'Enstrins Informer' web application. The top navigation bar includes 'Reports', 'Mappings', 'Security', and 'Admin'. The main content area is titled 'MyPackage' and contains sections for 'Special Links' and 'Download Links'. A red arrow points to the 'Download Links' section. A modal window titled 'New Package Download' is open, showing a progress bar at 100% and a list of download links. A red arrow points to the 'New Package Download' button in the top right corner.

Creating a Package from a Single Report

Creating a package from a single report is simple. Go to the Report Template page and click Package. You can either package right now with just the report and its dependencies or you can add the report to another package created using Custom Selections.

