User Training Guide

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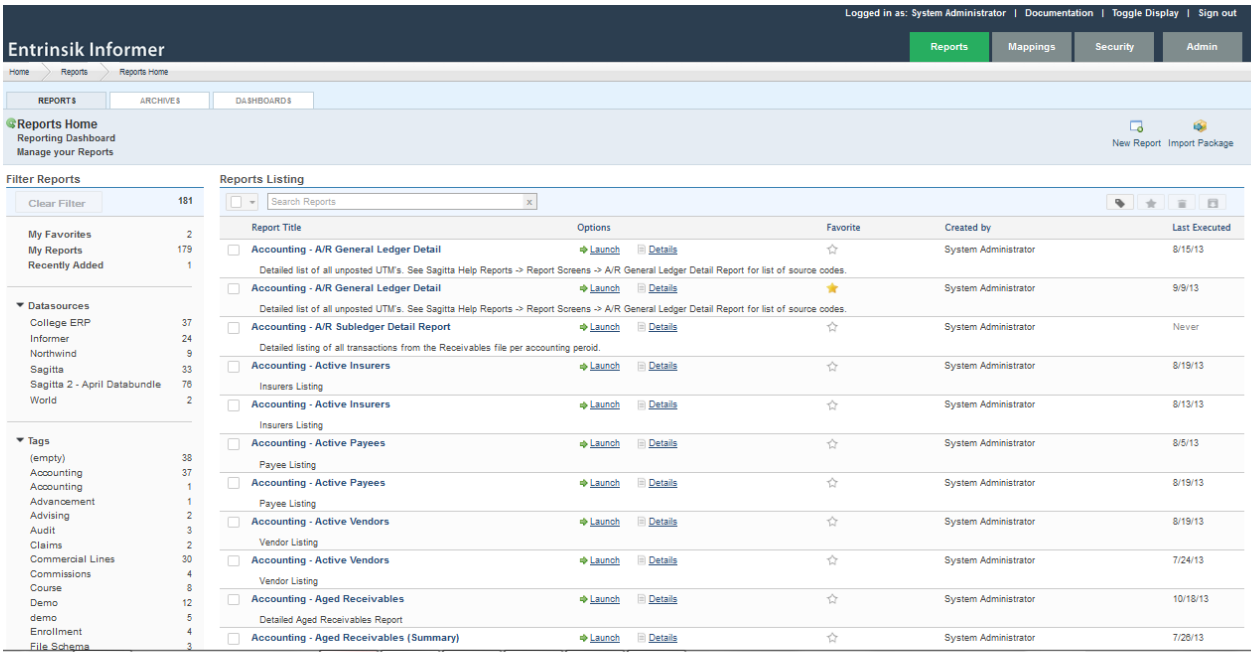
Chapter 1: Introduction

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.



Chapter 2: The User Interface

In This Chapter

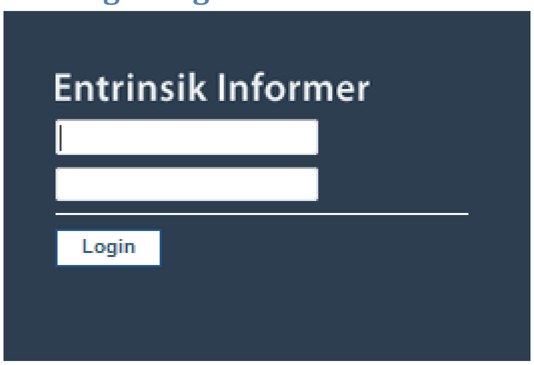
In this chapter, we will:

- Log into Informer
- Review the Main Landing Page

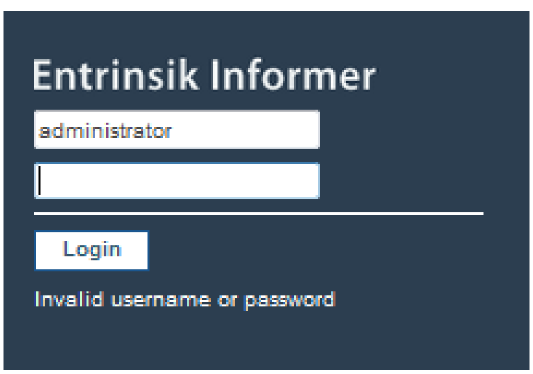
Logging In To Informer

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

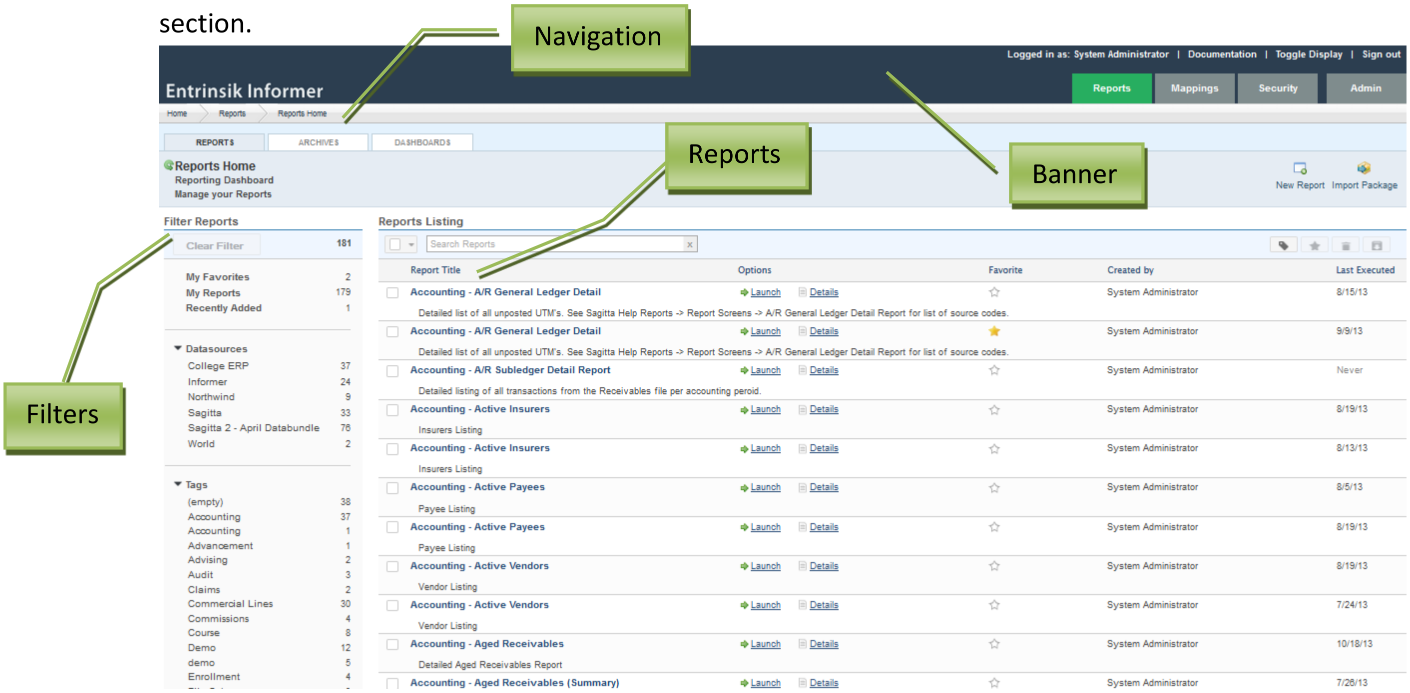


If you key your ID or password incorrectly, you will receive an error message:



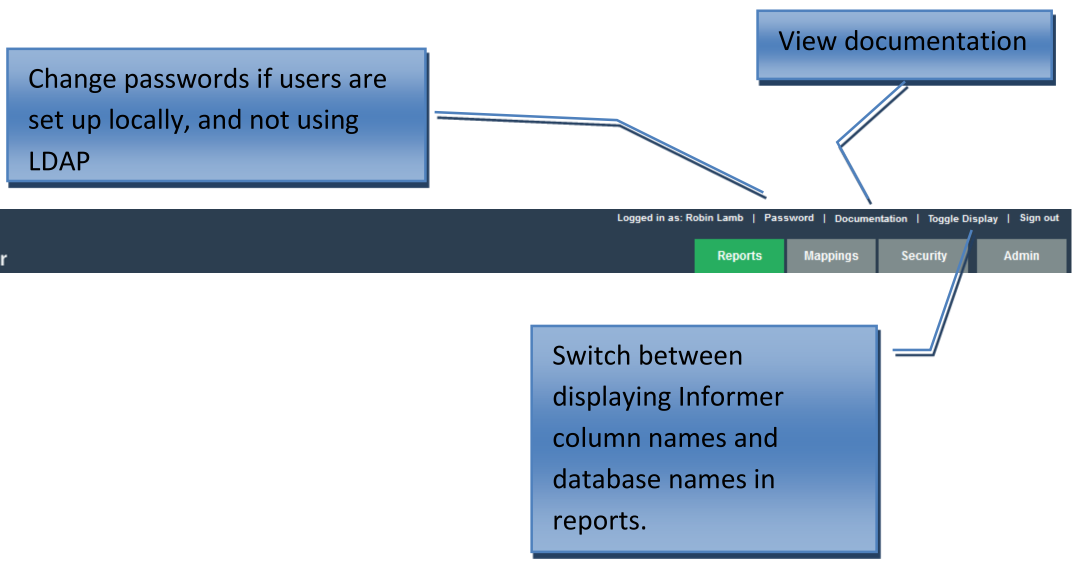
Main Landing Page

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.



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.

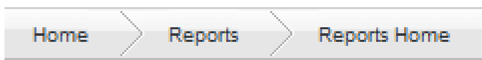


Security can be used to control what users see in the banner. The banner above is what an Informer Administrator would likely see. A regular user might see a banner like this one:

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.

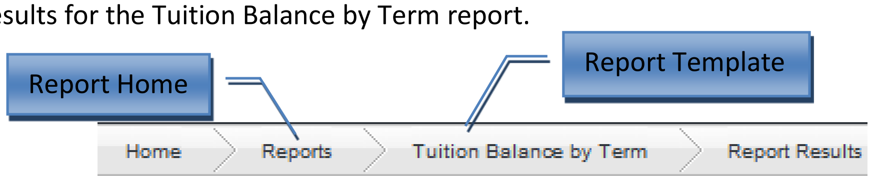
Navigation Bar

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".

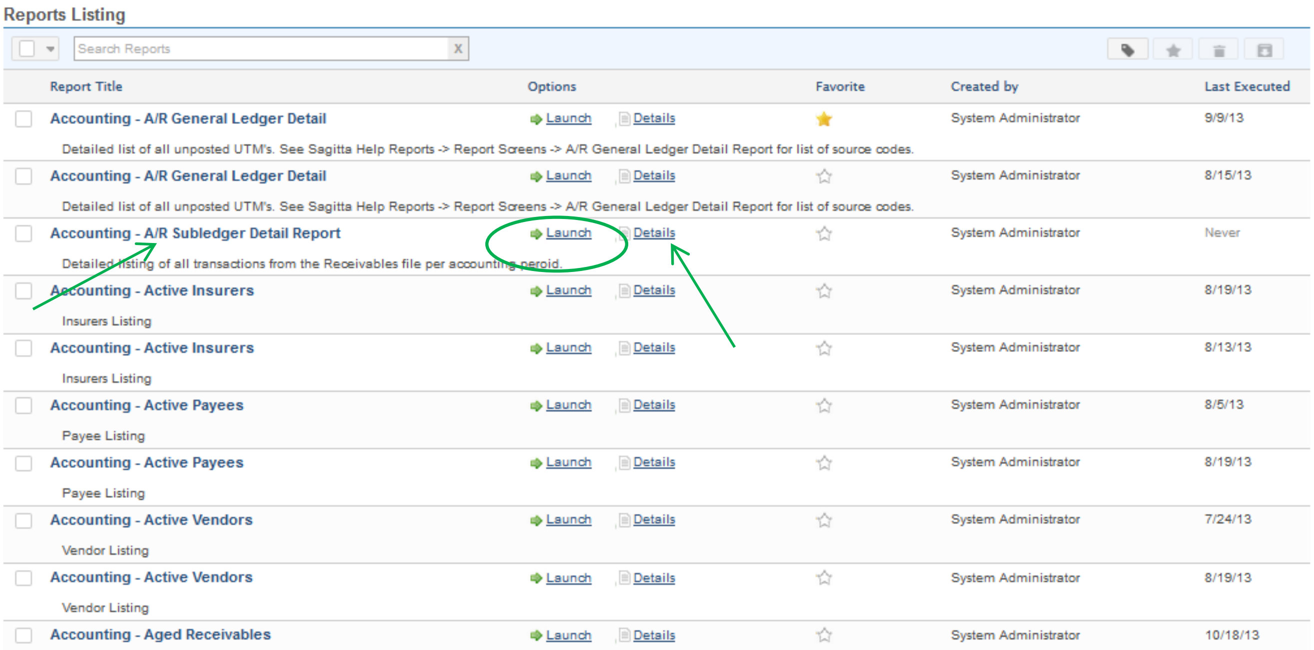
As the user progresses through the screens, the chain is updated. Here the user is viewing the report results for the Tuition Balance by Term report.



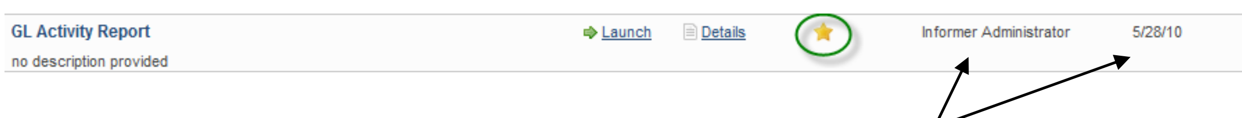
Using the links, you can migrate back to the report template for Tuition Balance by Term report, or go back to the Reports Home page.

Report Listing

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



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.

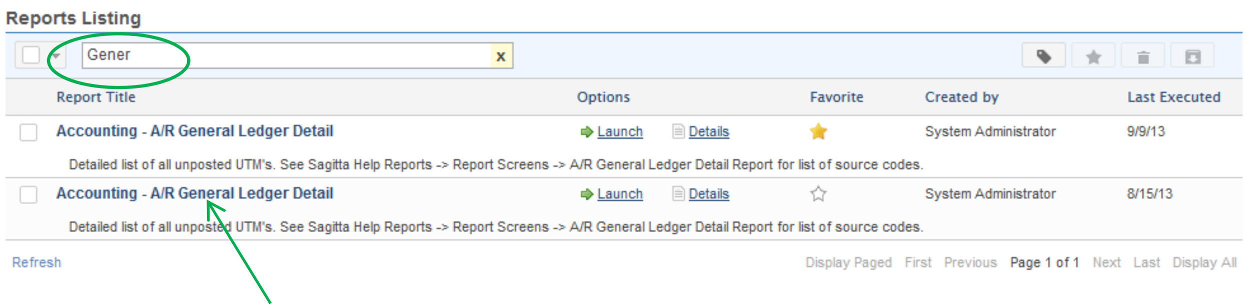


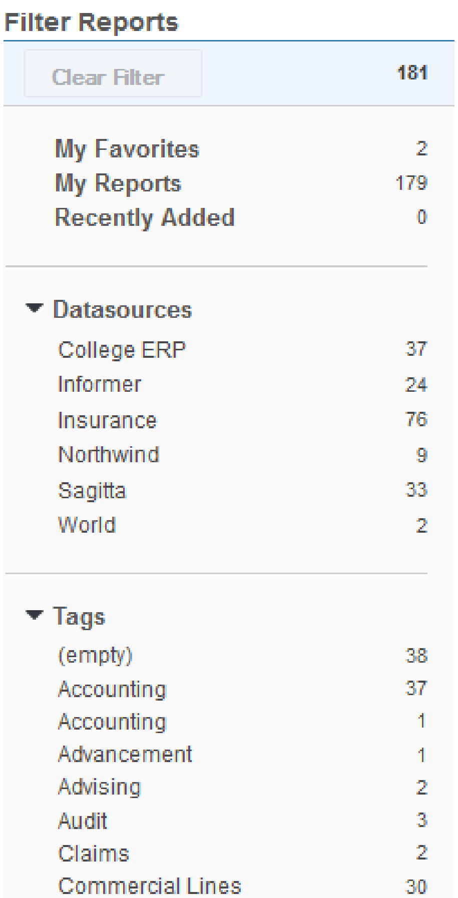
The listing also shows who created the report and the last time the logged in user executed it.

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.





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
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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

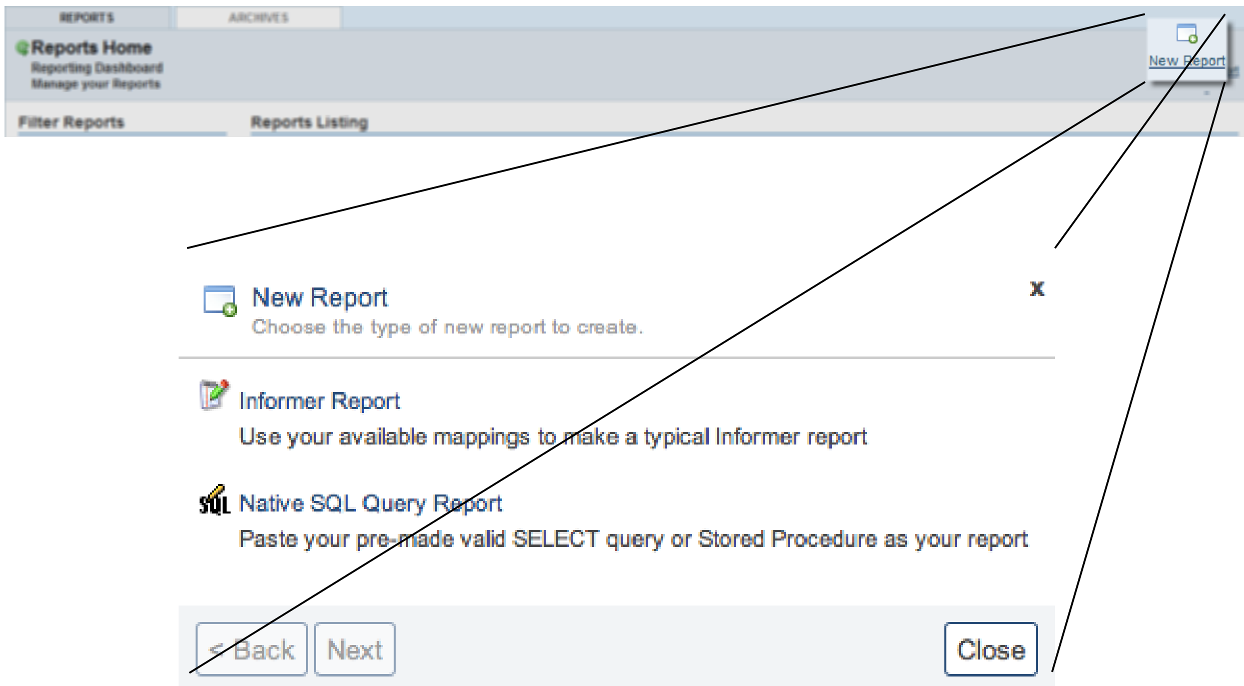
In This Chapter

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.



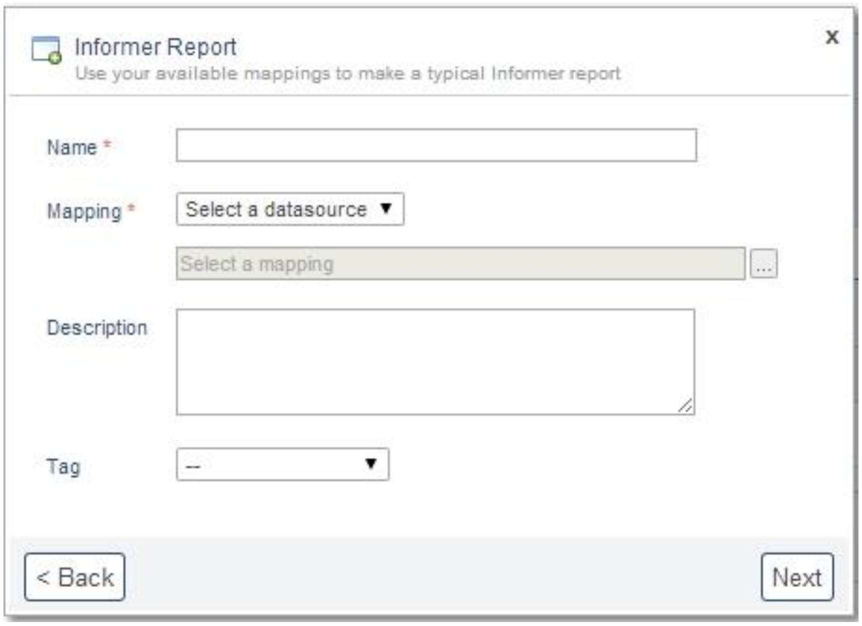
Report Type

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.

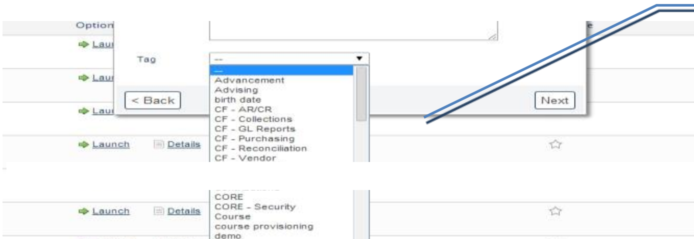


Name (Required): Give the report a brief but descriptive name.

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.



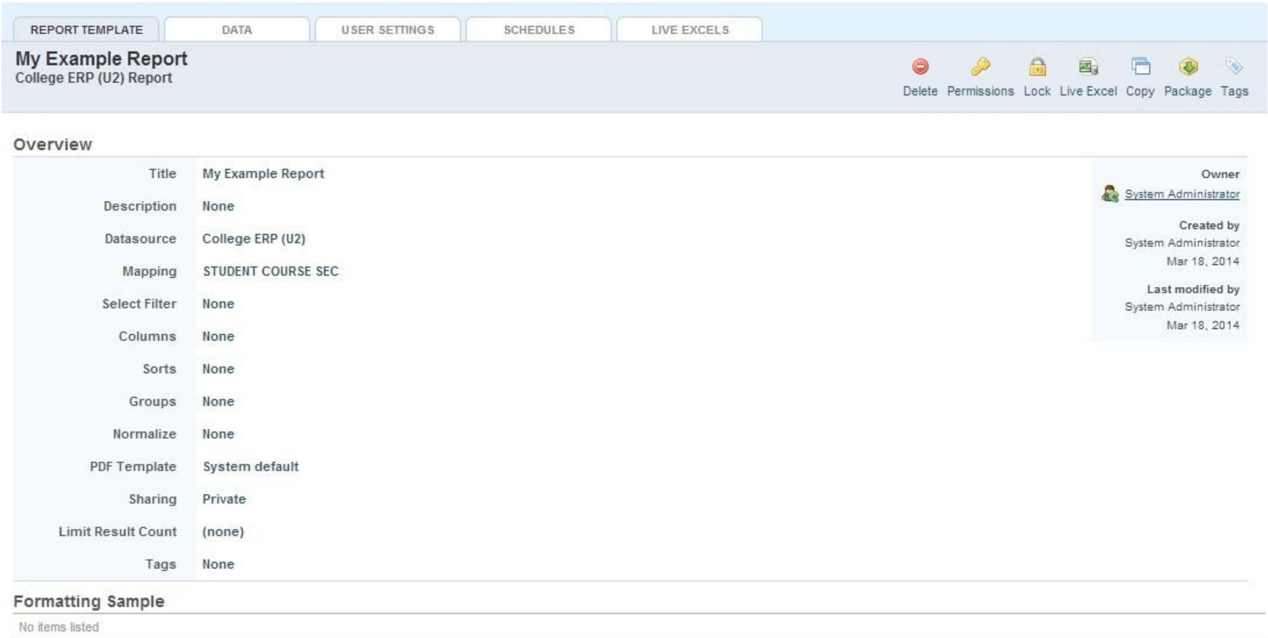
Informer will only list existing tags. To create a new tag, click the link for tags on the next screen: report template.

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

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.

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

Report Details



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:

Birthday	**Last Name**
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:

Birthday	**Last Name**
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.

Birthday	**Last Name**
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.

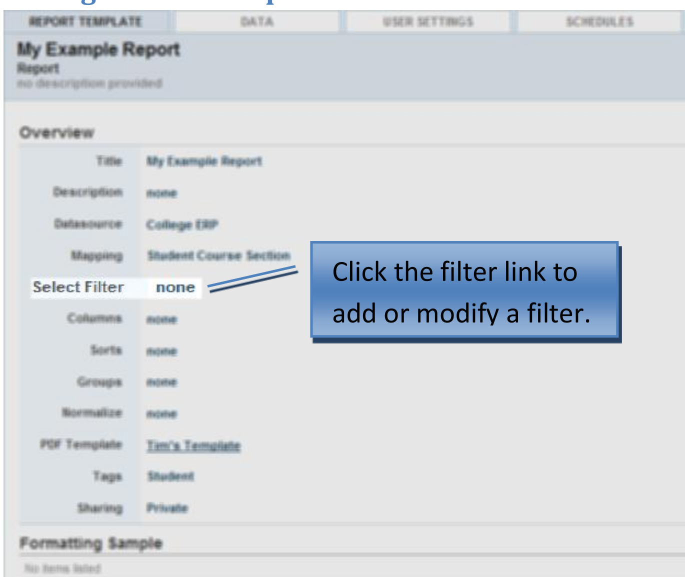
Parenthetical grouping means placing parenthesis around the conditions to force them to be evaluated first. It is the same principle that you learned in algebra where the mathematical operation inside the parenthesis is performed first. So in our example, our condition would be

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

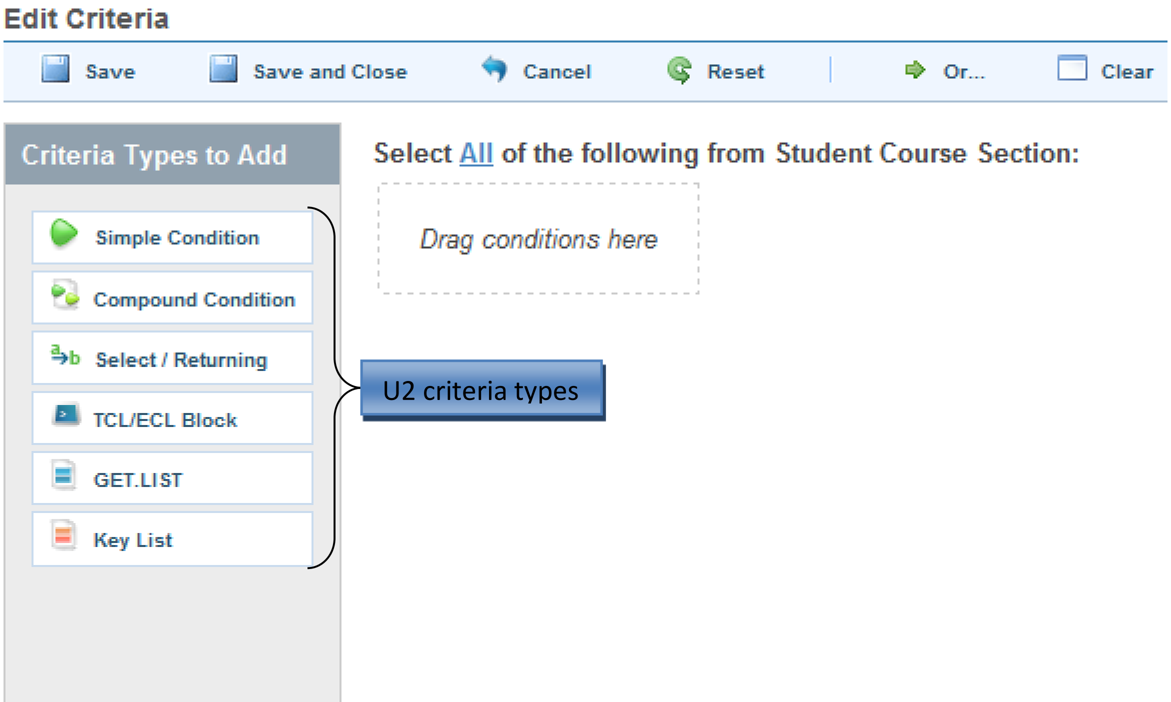
Adding Filters to Reports



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



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.

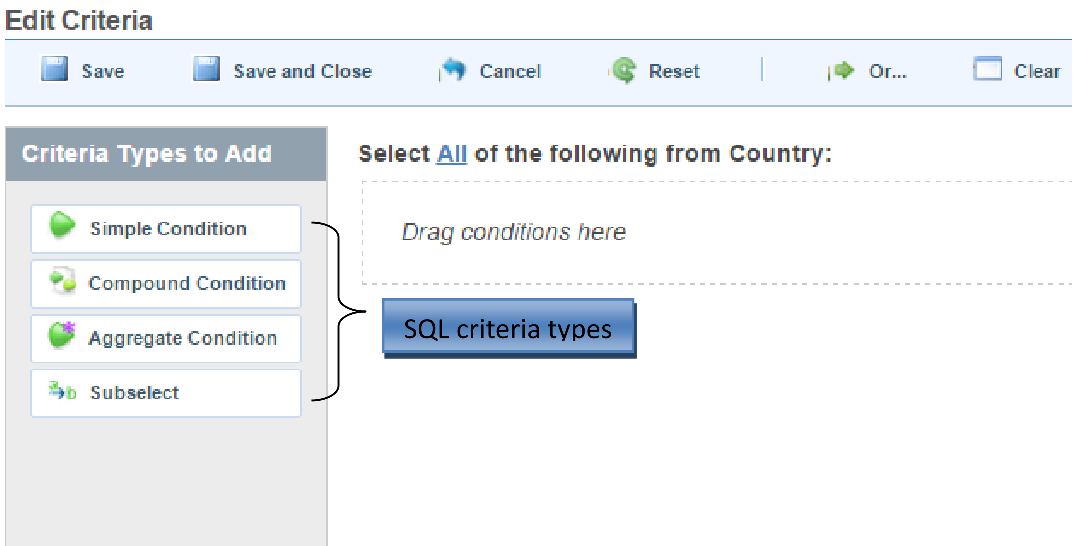
Select/Returning: (U2 only). This option allows you to select items in one file and return the keys to another file.

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

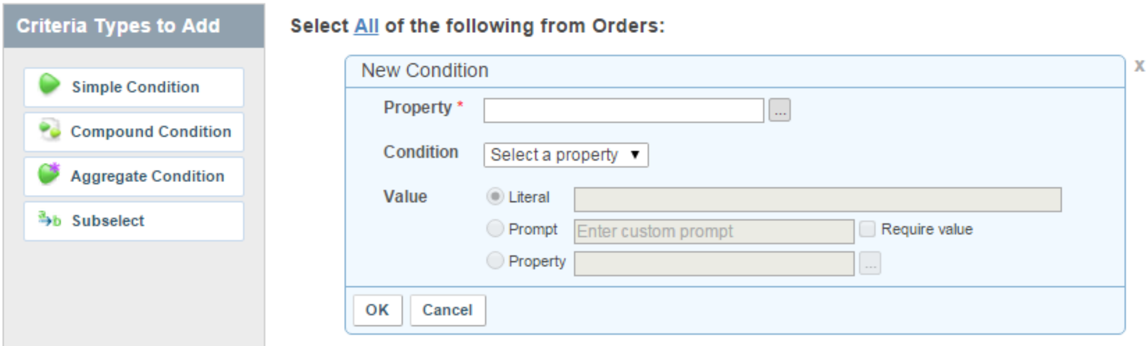
Compound Condition: A compound condition is used to start a new parenthetically grouped set of simple conditions.

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:

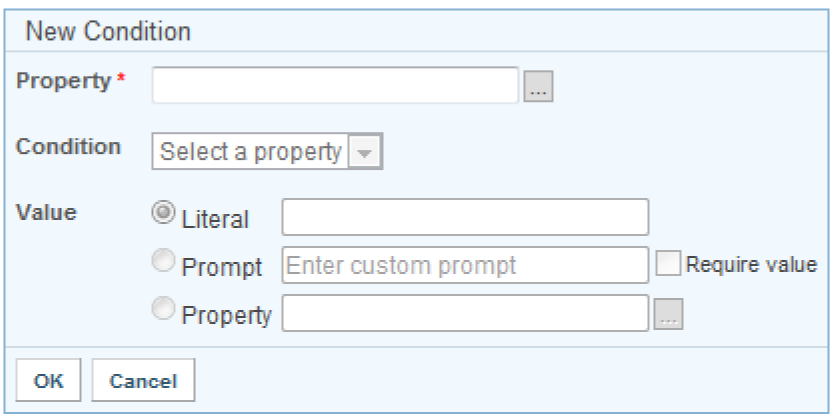
- You want to see if a value occurs in a certain dataset.
- You want to see if a value does not occur in a certain dataset.
- You want to compare a value to an aggregate value from a certain dataset.

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”.



Simple Conditions

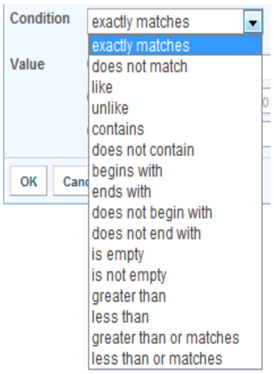
A simple condition is a comparison of a field against a value. The value can either be a fixed literal value, or a prompt to enter the value when the person runs the report. It is also possible to choose the value to equal the value of another field.



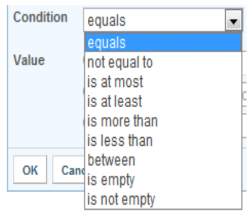
Property: The field to be used in the comparison. This can be any mapped field in the file used for the report, or in any file to which the primary file is linked.

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

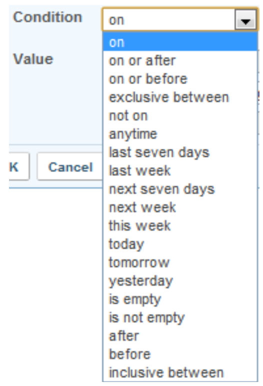
Text Conditions



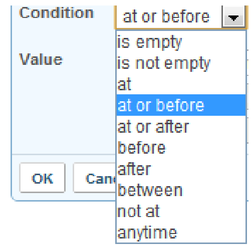
Numeric Conditions



Date Conditions



Time Conditions



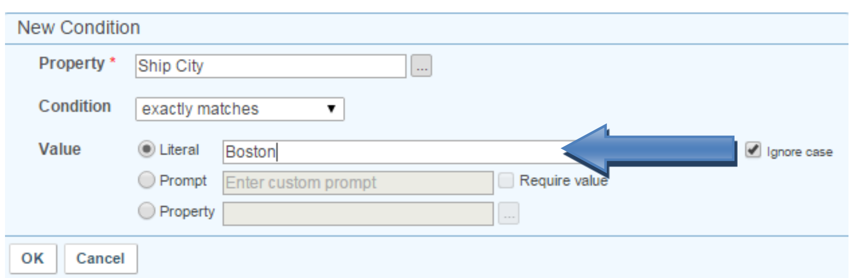
Value: The value to which you are comparing the property. Value can be a literal, a prompted value (value entered by the person running the report), or another property.

- 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.

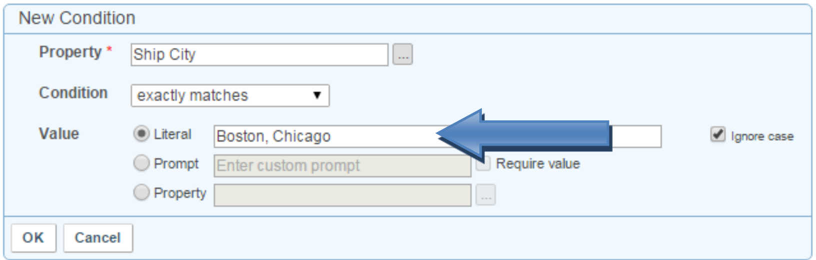
  Examples of date-specific keywords are TODAY, WEEK_BEGIN, QTR_BEGIN, YEAR_AGO. For a list of date-specific keywords, see the Appendix in the Informer user guide.

  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.

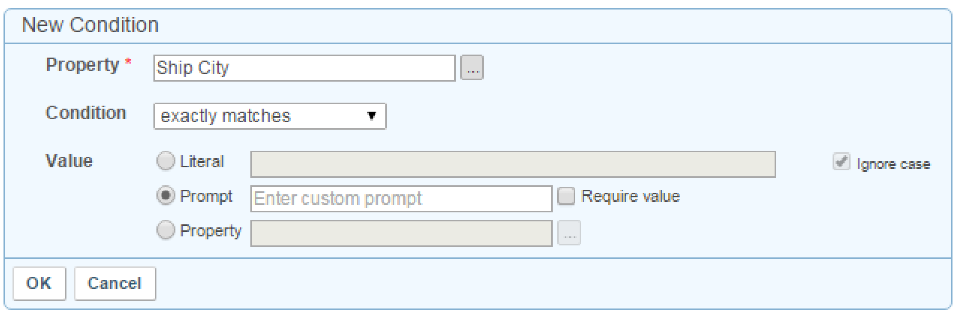


  You can also enter a list of values, separated by commas, to compare against. For example, if you wanted multiple cities, you could enter Boston, Chicago. This creates an implied OR condition.

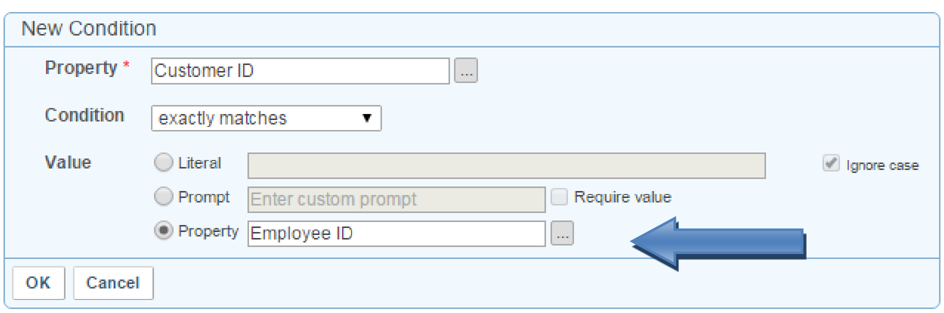


Be careful when using a list of values in a negative condition (does not match, does not contain, etc.). This may cause unexpected results.

- 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”.



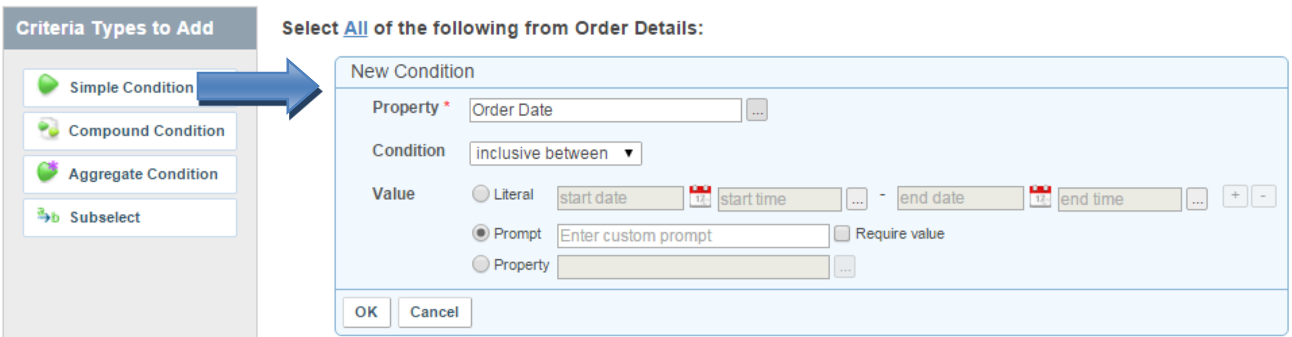
- Property: used to compare the property against another property. For example, if you to see if you had any customers that were employees, you would compare the customer id to the employee id.



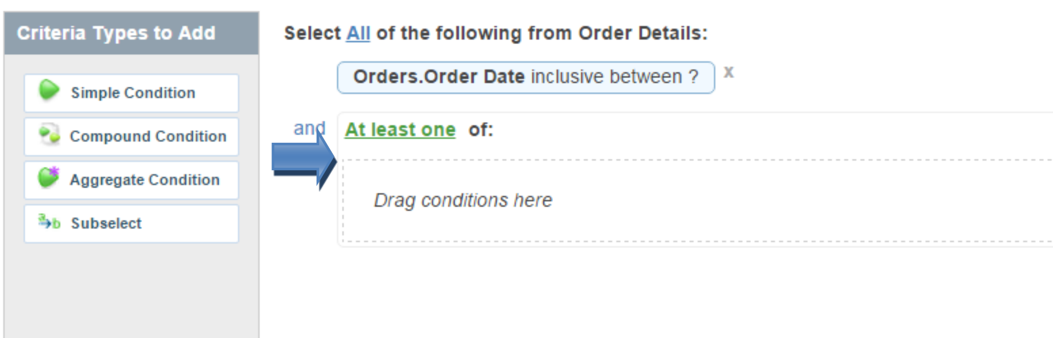
Compound Conditions

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.

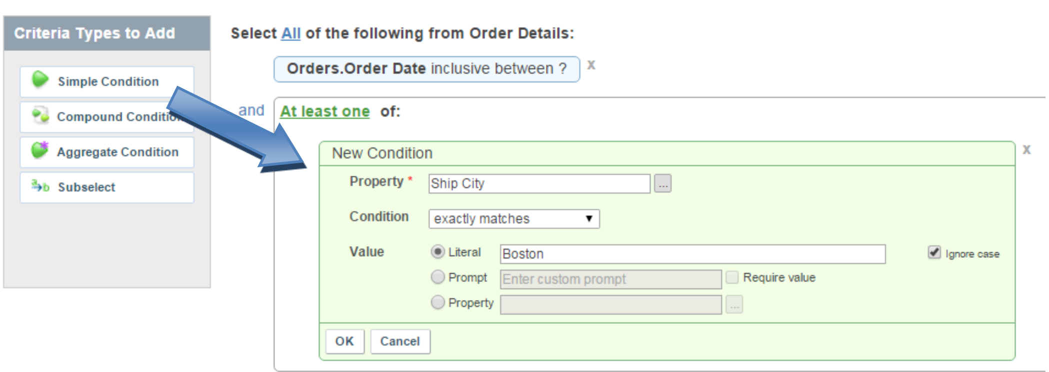
First, choose a simple condition for the order date:



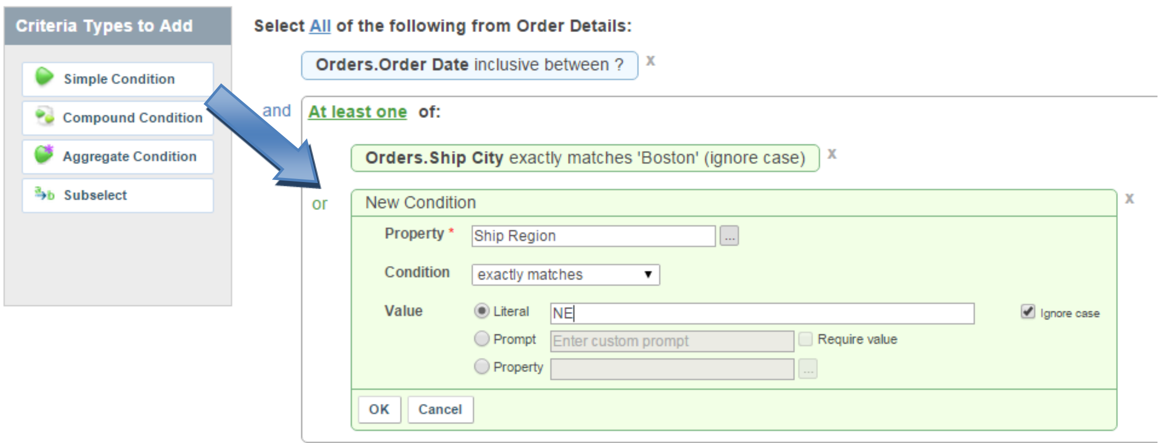
Now add a compound condition.



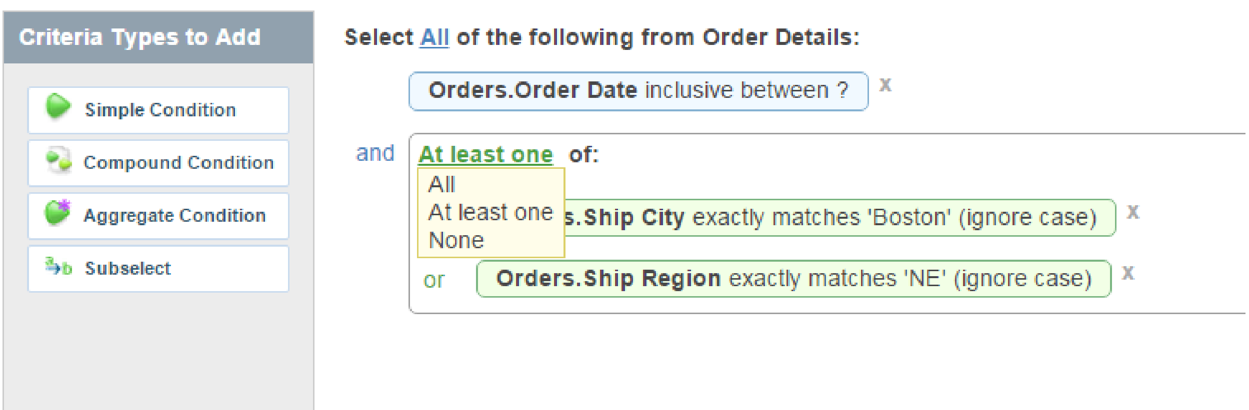
This starts a new grouping of simple conditions. To start adding conditions, click on Simple condition. We can now add the condition to filter for a specific city.



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”.

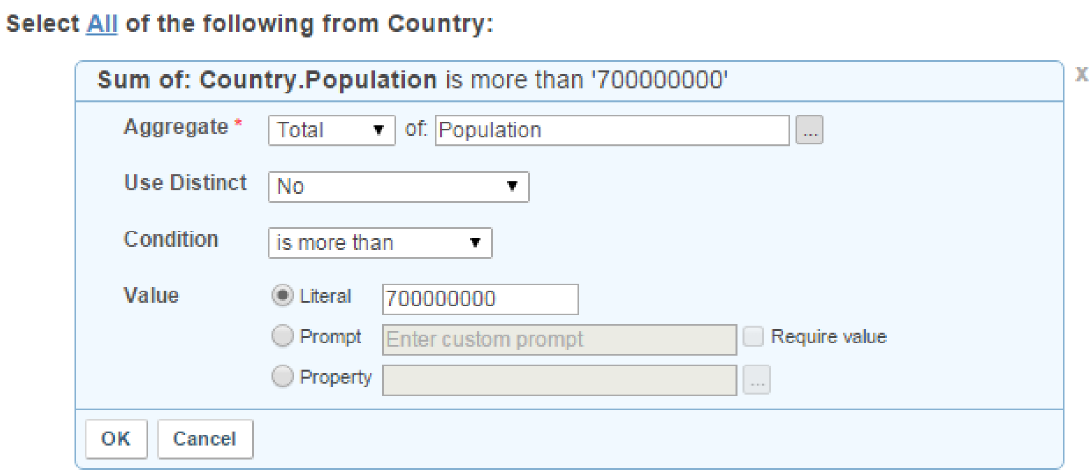


Add some criteria to your report.

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:



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.

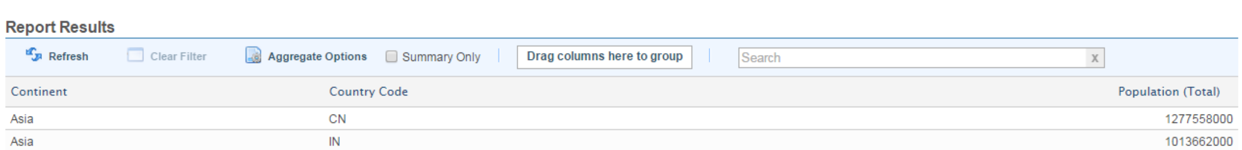
(Please see *this* article for more explanation on condition types and values.)

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:



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.

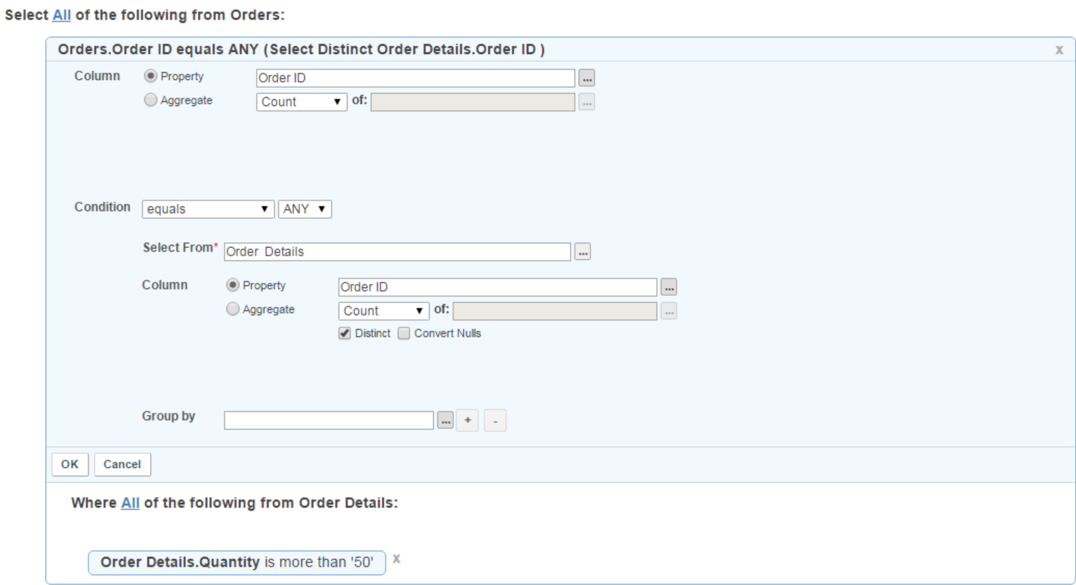
See if a Value Occurs in a Certain Dataset

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.

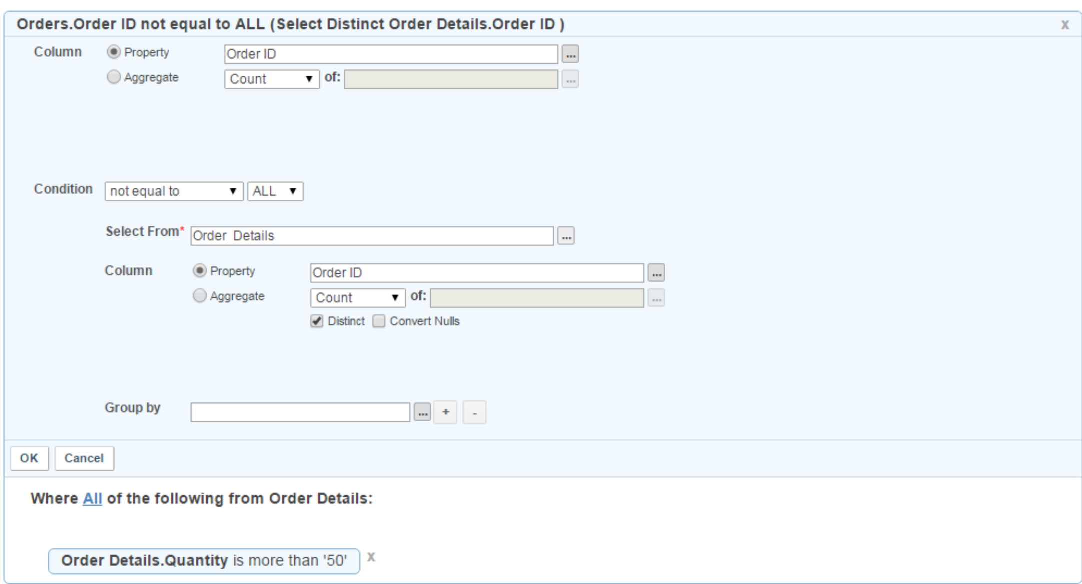
Click or drag the subselect box to create a new condition.



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 <u>not</u> have any orders of at least a quantity of 50.



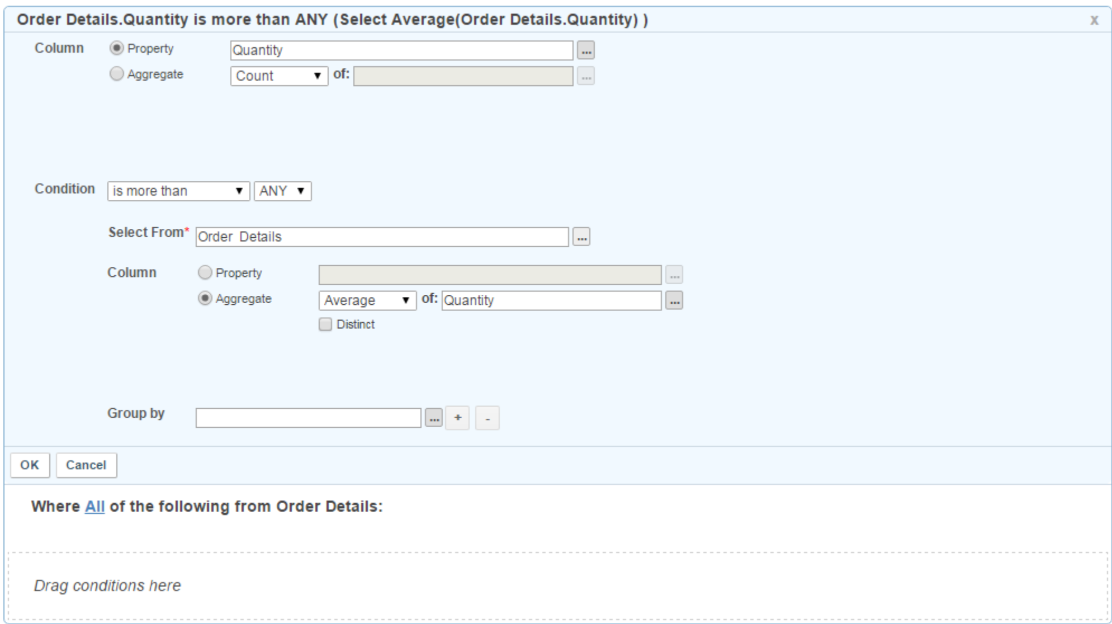
Here we are still selecting a dataset of all the Order ID's from Order Details that have orders with quantities not more than 50. By stating "not equal to" and “ALL” in the condition, we are making sure that the selected Order ID from Orders is not in the dataset from Order Details.

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.

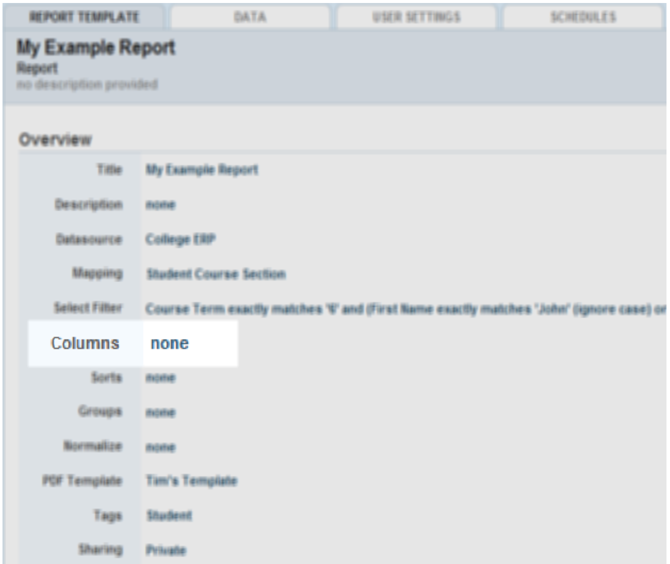
In this example, we will compare the quantities of individual orders to the average quantity of all orders. No conditions are needed in this subselect.



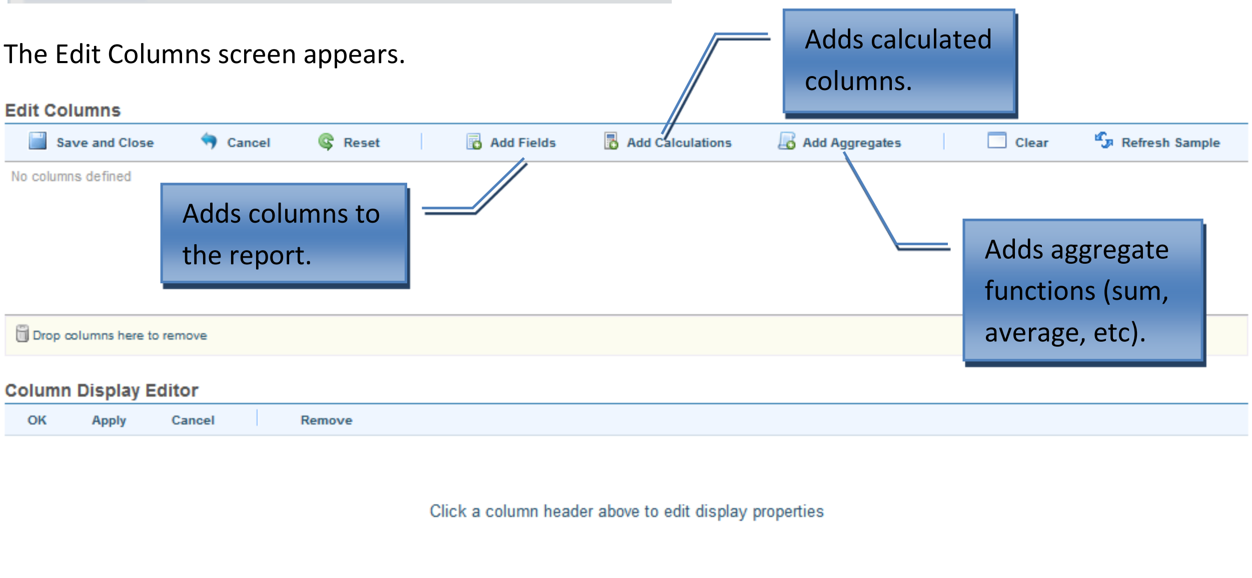
Columns

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.

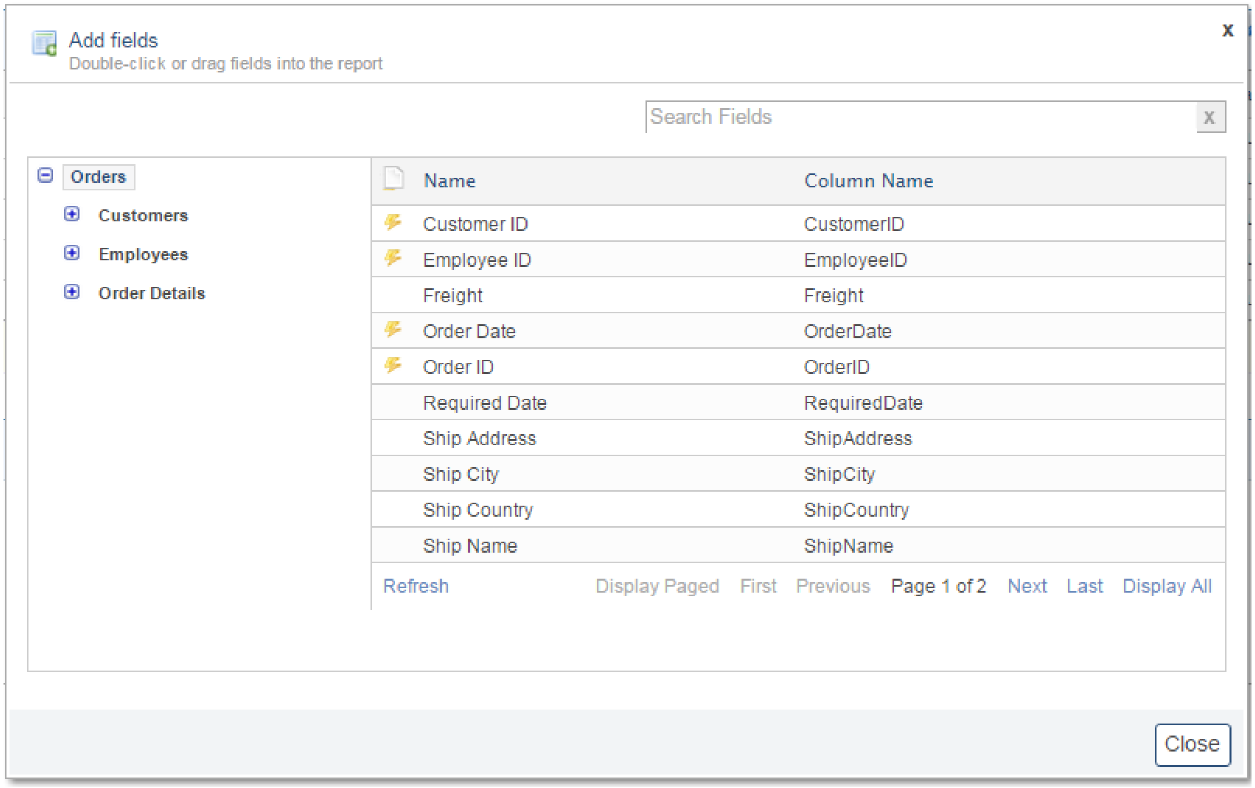


The Edit Columns screen appears.



Adding Fields

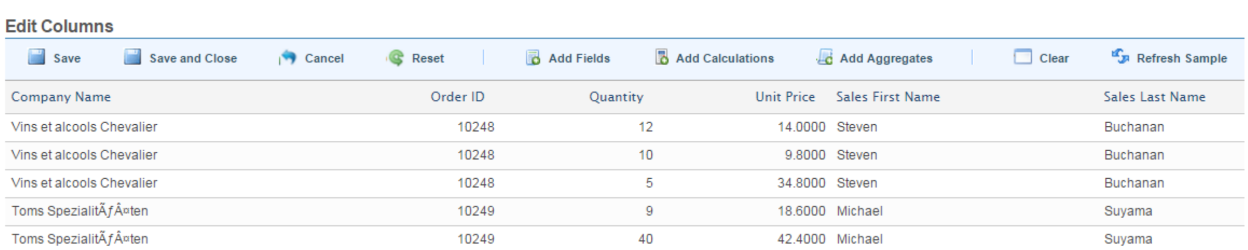
Click “Add Fields” to place data columns on the report.



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

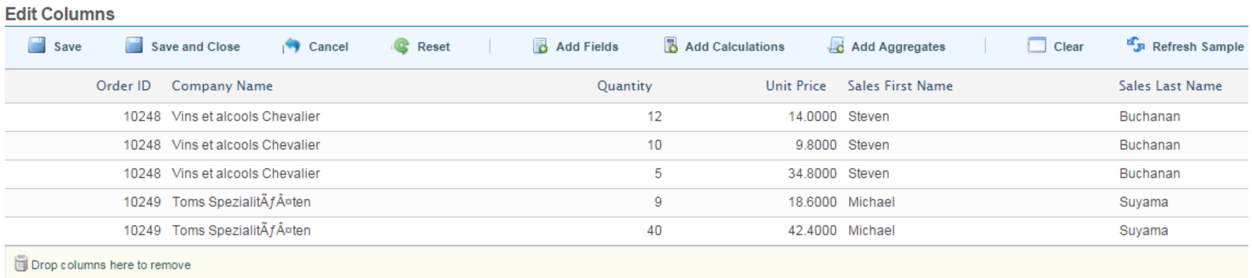
To add a field to the report, double-click the field name, or drag the field onto the report.

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



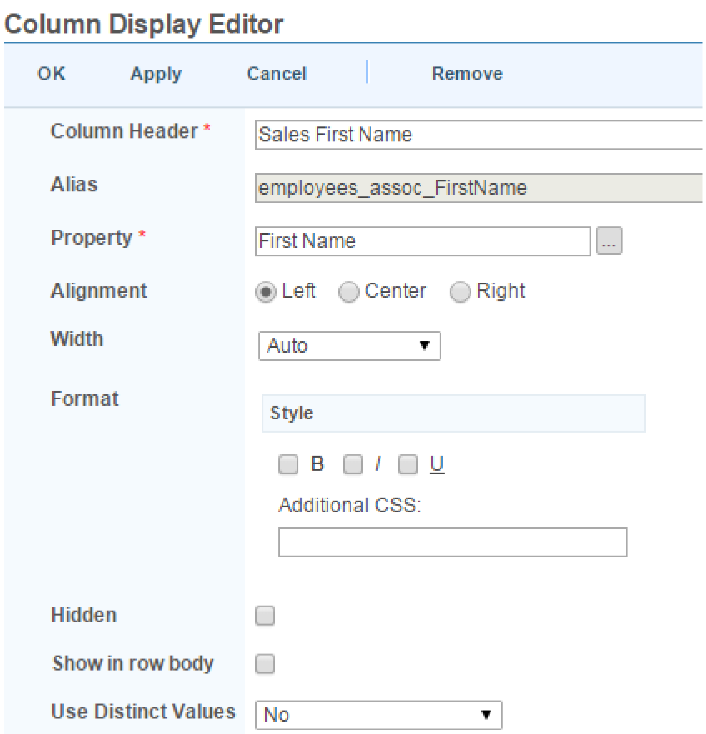
Company Name	Order ID	Quantity	Unit Price	Sales First Name	Sales Last Name
Vins et alcools Chevalier	10248	12	14.0000	Steven	Buchanan
Vins et alcools Chevalier	10248	10	9.8000	Steven	Buchanan
Vins et alcools Chevalier	10248	5	34.8000	Steven	Buchanan
Toms SpezialitÃƒÂ¤ten	10249	9	18.6000	Michael	Suyama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



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 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 of 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.

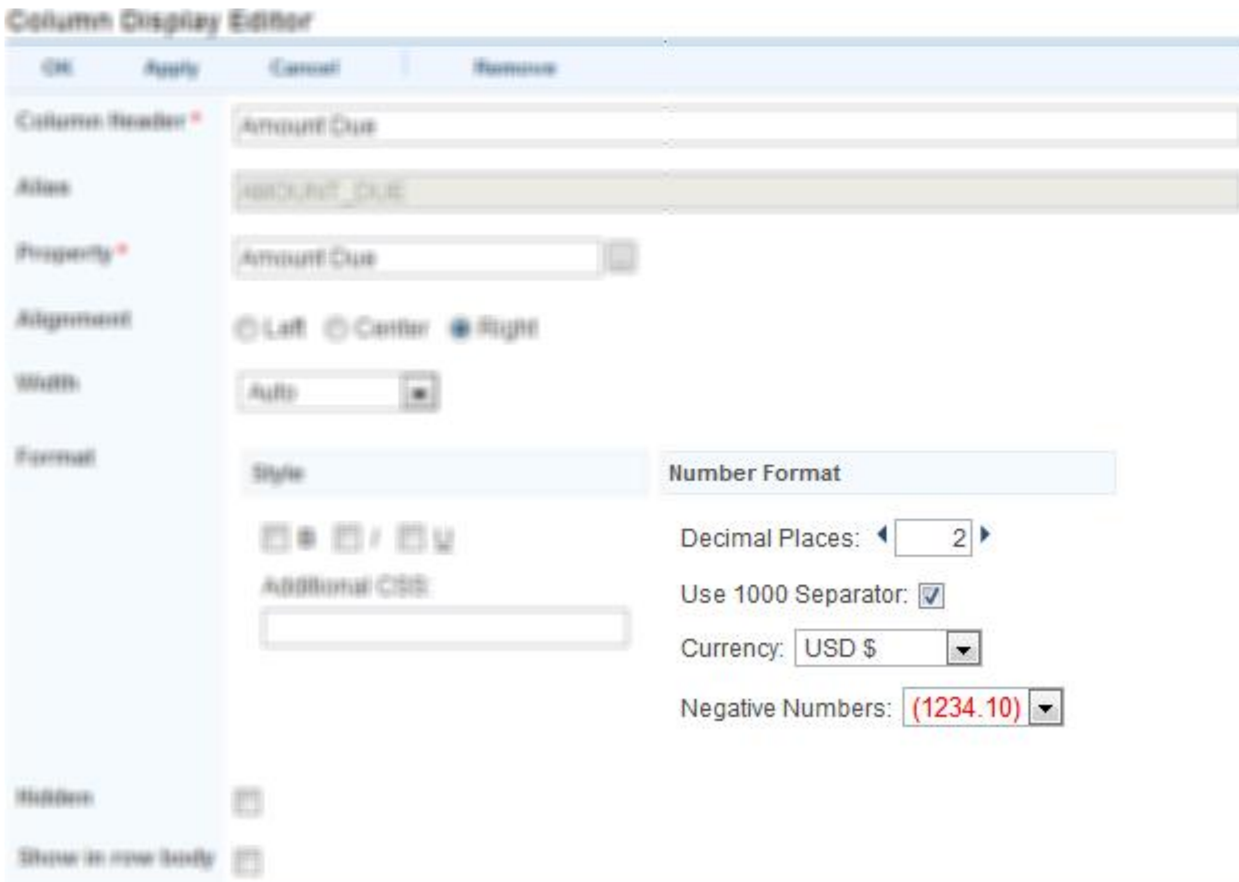
Example: If set to No, a report of ID's might look like this…

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:



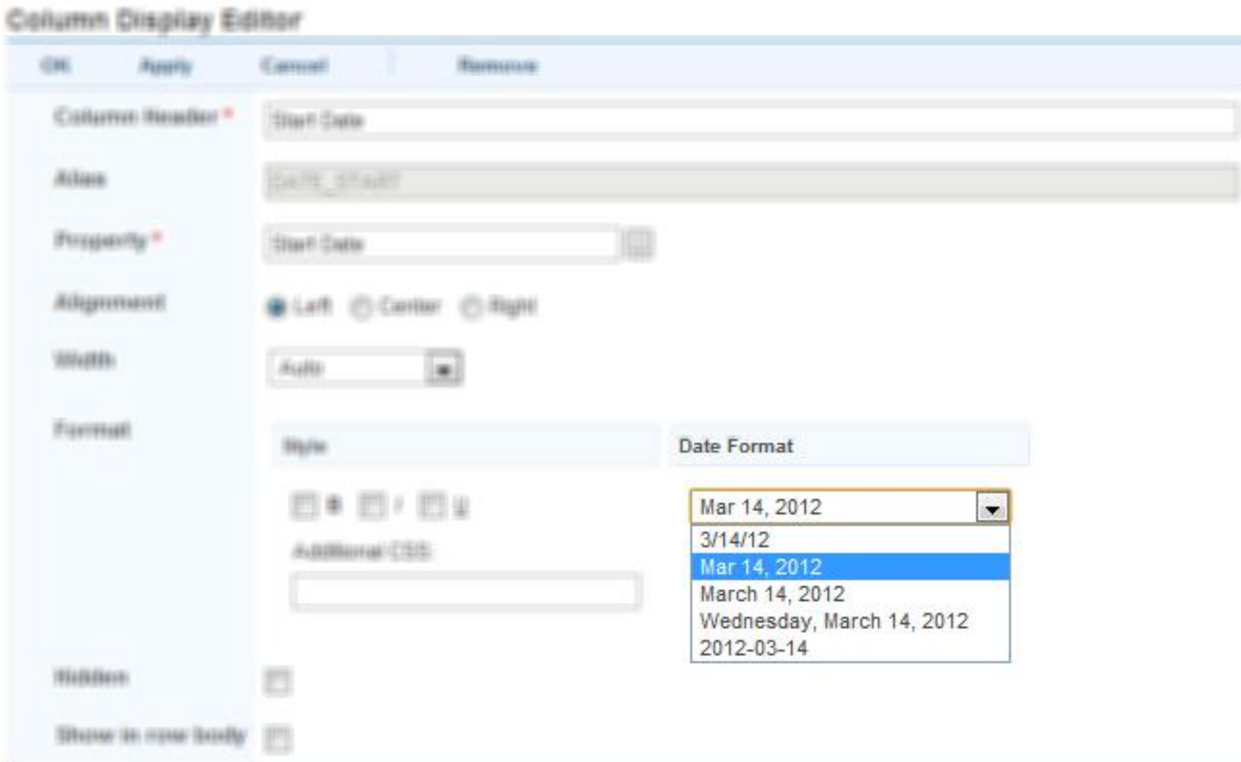
Decimal Places: Controls the number of decimal places to display.

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:



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.

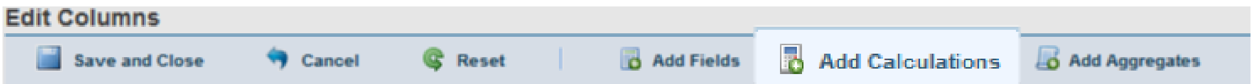
Informer JavaScript vs. "Normal" JavaScript

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

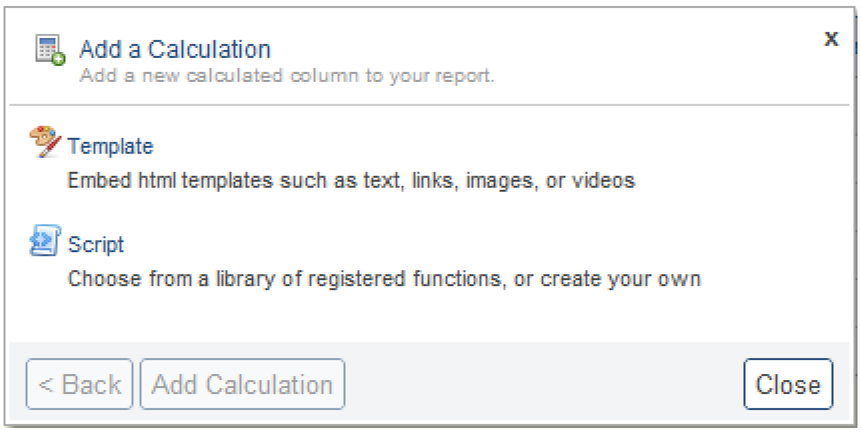
JavaScript is actually embedded within and interpreted by the Informer Java application. Once interpreted, the results are passed to the browser. This means that Informer JavaScript cannot affect the HTML document that is viewed in the browser. It can, however, do everything else that JavaScript can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

Adding Calculations

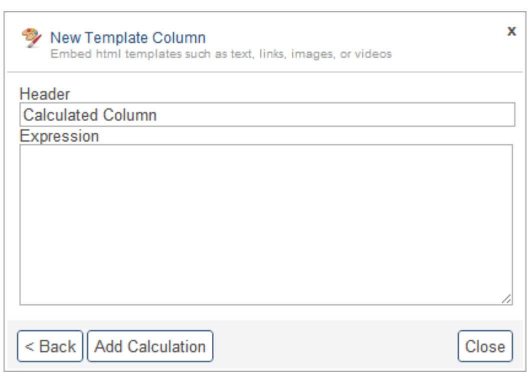
To add a calculated column, click Add Calculations.



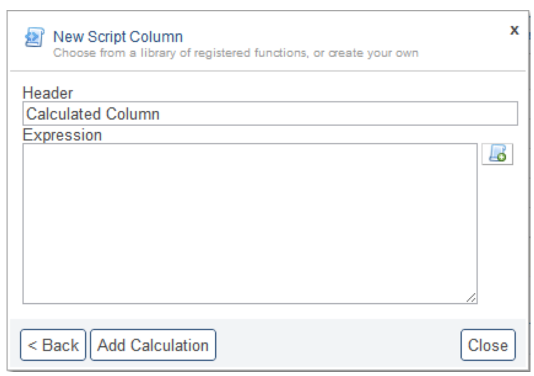
Informer will then ask you which type of calculation you wish to create.



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



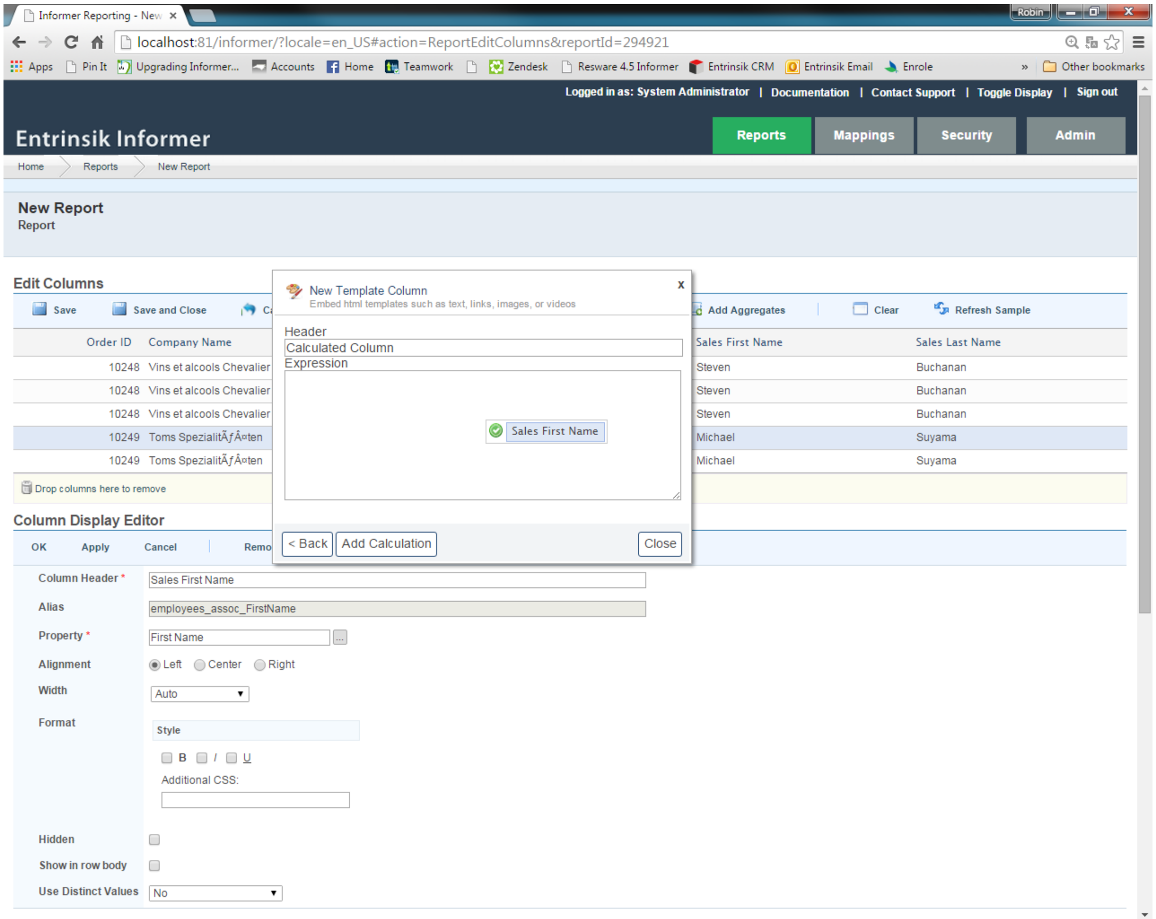
Template Expression Window



Script Expression Window

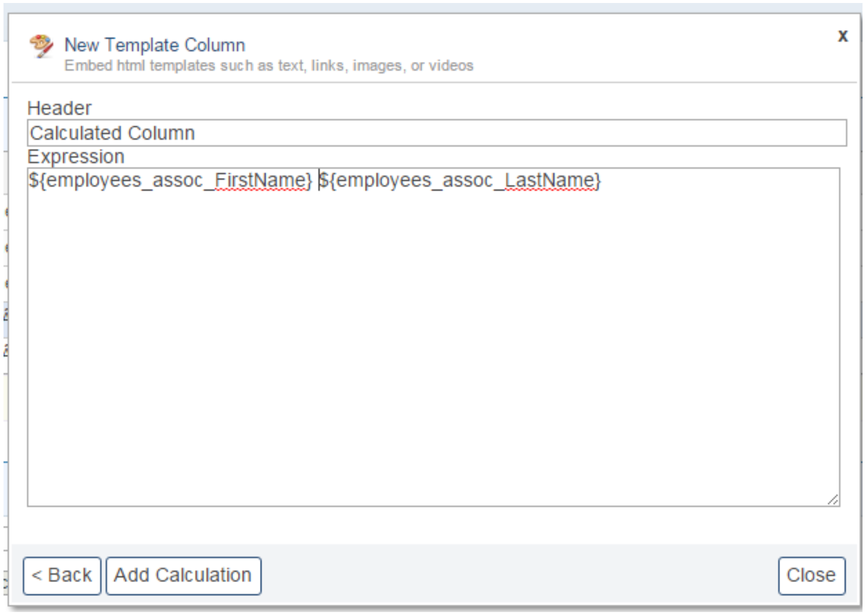
Give the column a name in the header, and then type your calculation code in the expression window.

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.

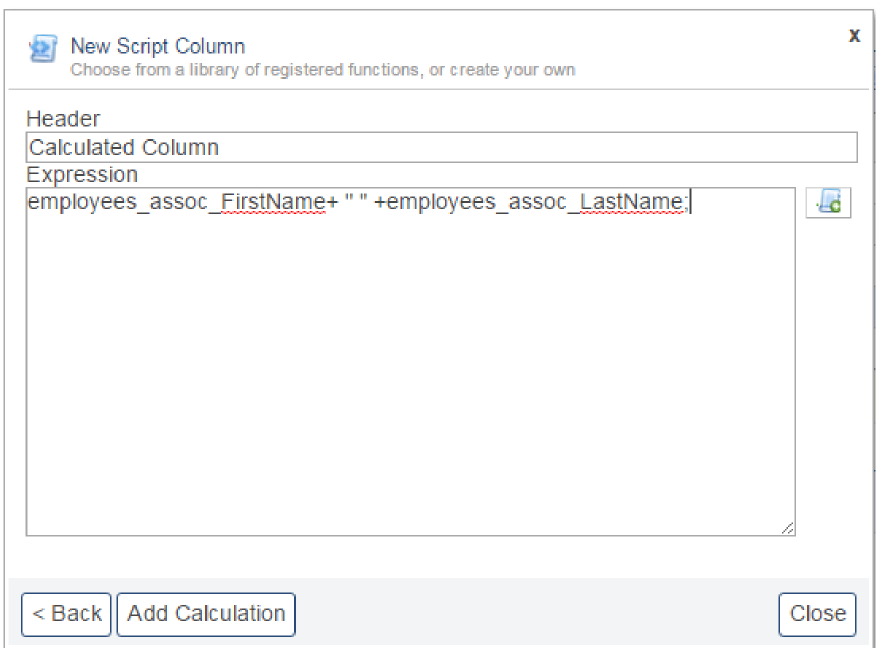


If we wanted to concatenate the first and last name together, you could use either Template or Script.

Template Code:
${employees_assoc_FirstName} ${employees_assoc_LastName}



Script Code:
employees_assoc_FirstName+ " " +employees_assoc_LastName;



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;

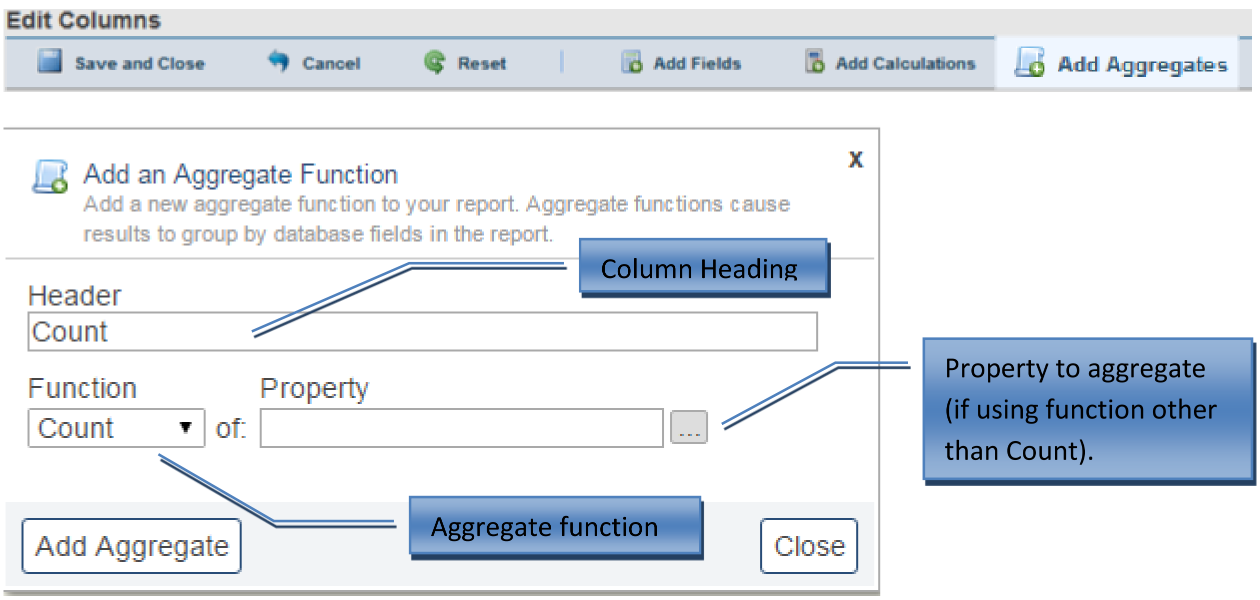
Be sure to use the appropriate alias names for your columns!

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

Create one or more calculated columns in your report

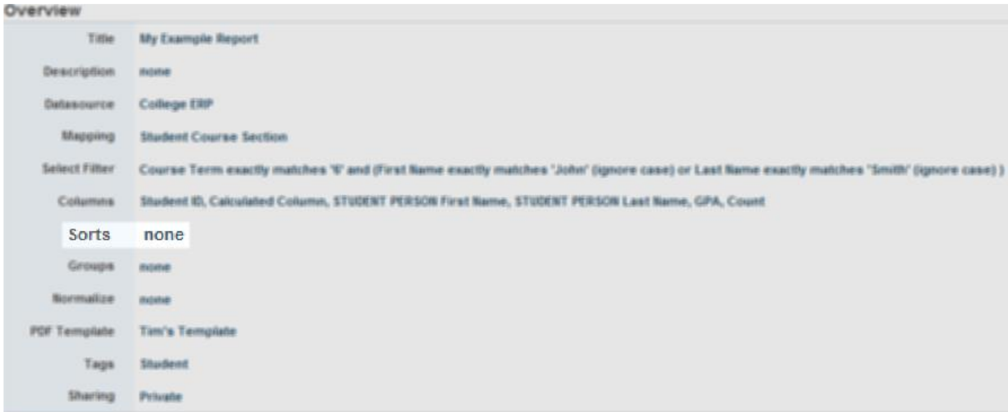
Adding Aggregate Functions

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.

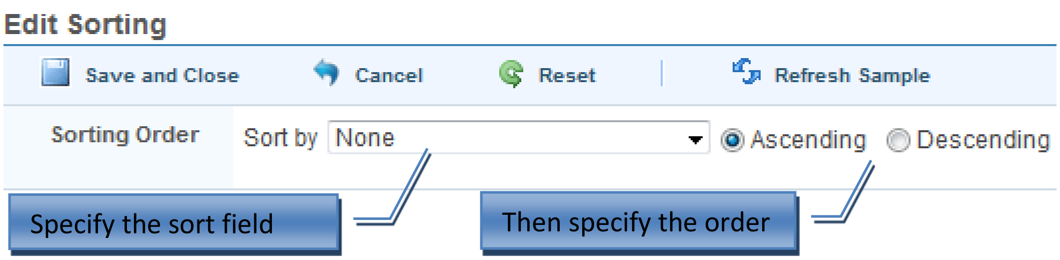


Aggregates will summarize a report to the lowest level of detail on the report. For example, a report containing Student ID, Name, and aggregate totals for attempted and completed credits would be summarized to the individual student. If term is added, then the aggregates would total by student and by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

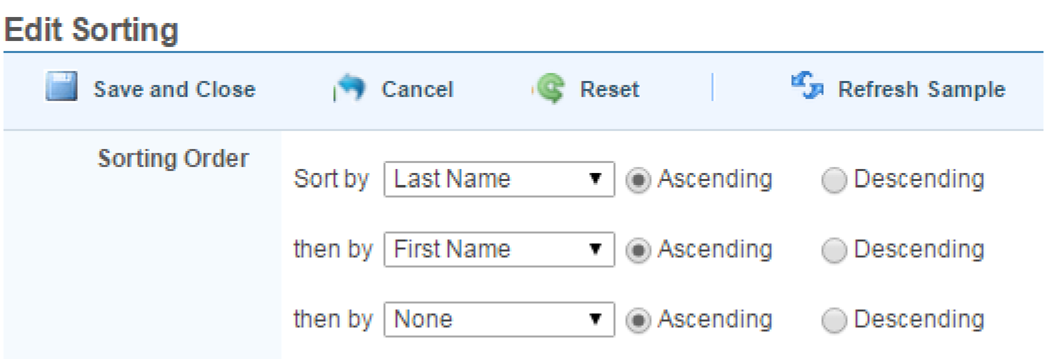
Sorts



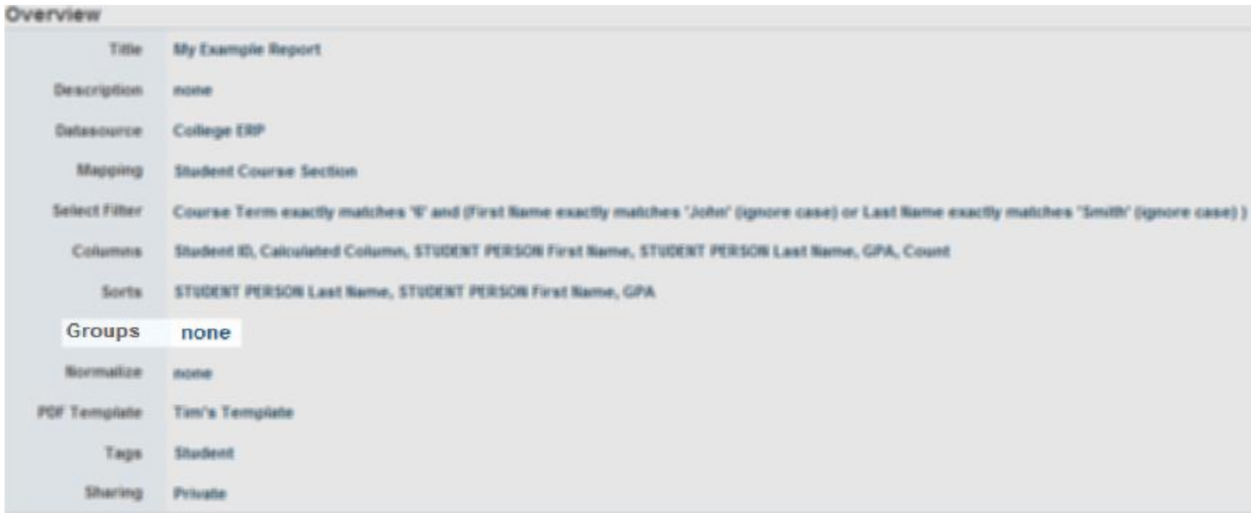
As seen earlier, you can change the sort order of the report on the fly by clicking the column heading while viewing the report. You can also specify the initial sort order by going into Sorts from the report definition.



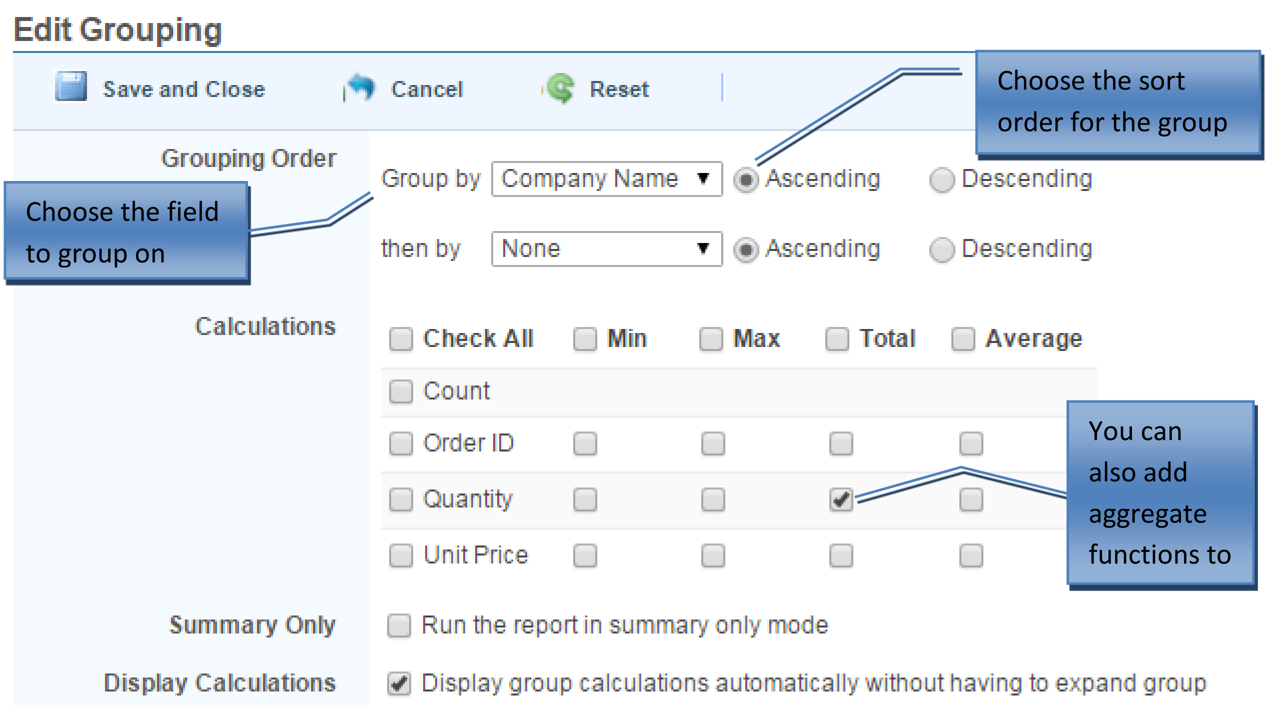
You can add as many sort fields as there are fields on the report.



Groups

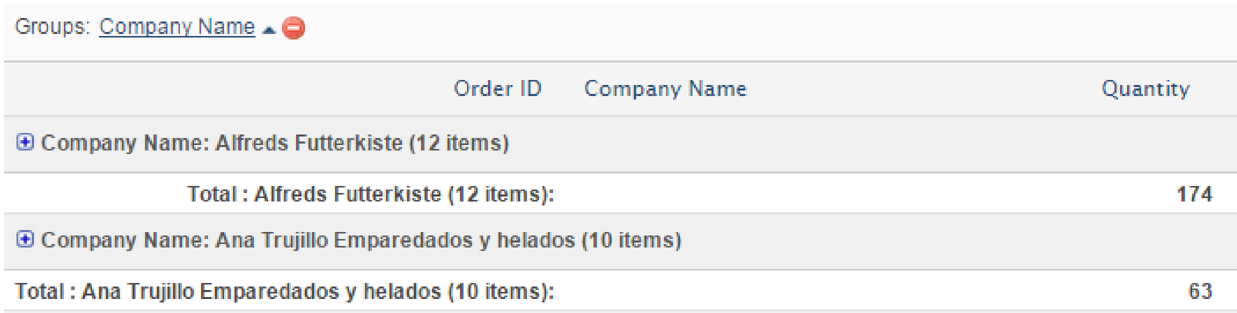


You can group your data by any field on the report. Click on the Groups link to add or change groups.



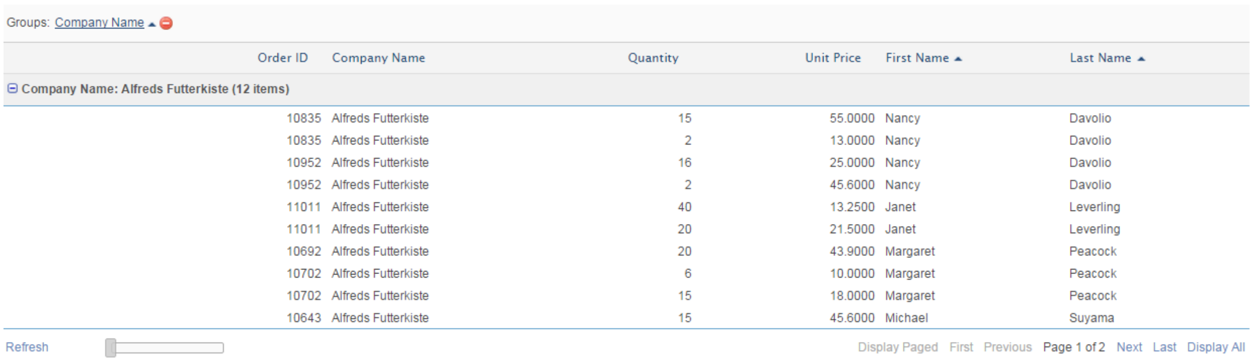
Summary Only: You can choose to leave the report in groups or click on the Summary Only box and just get a summary of results.

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



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

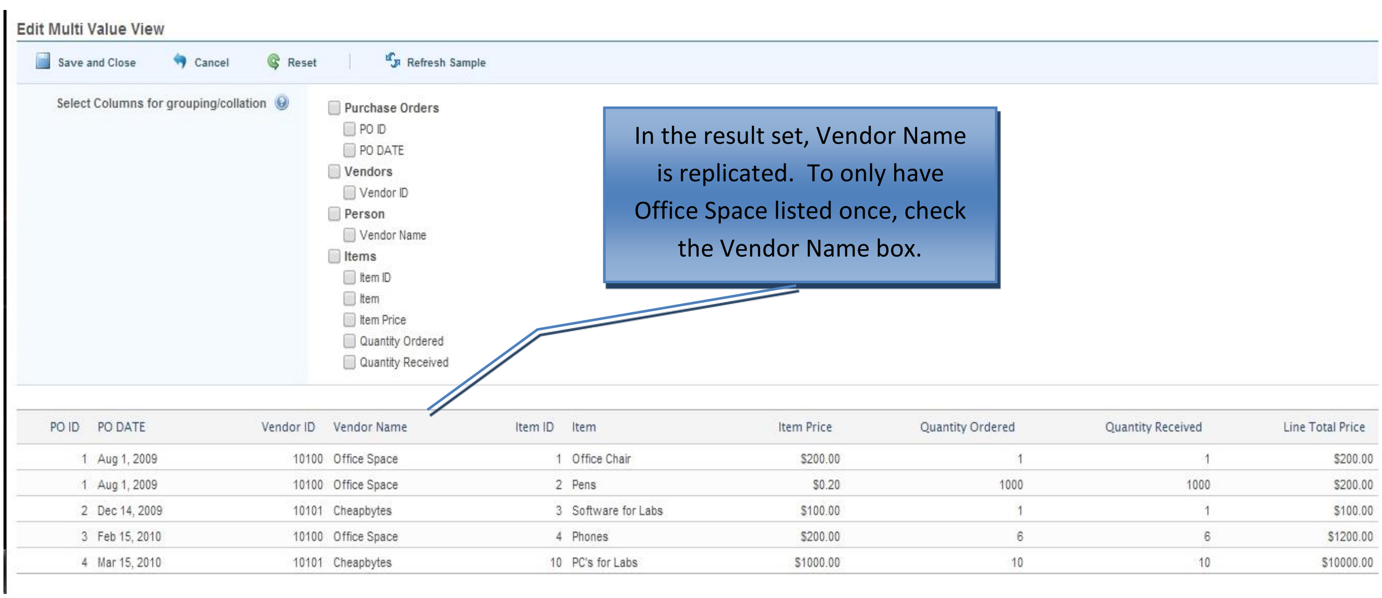
When the report is run, the groups can be expanded by clicking on the plus sign.



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

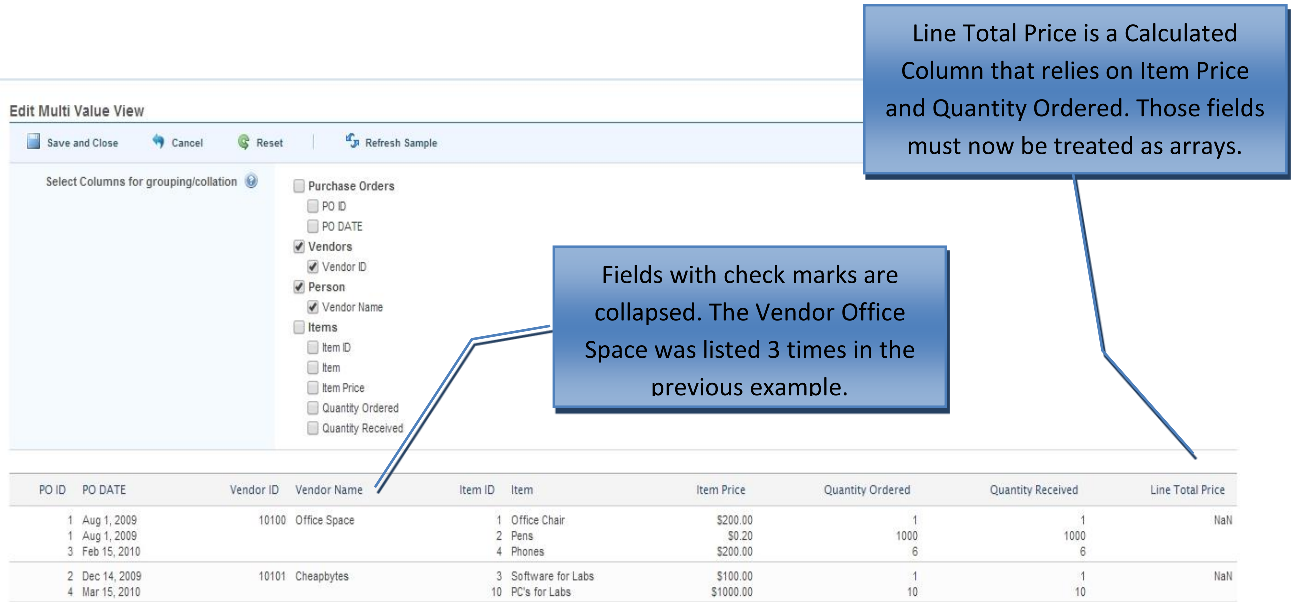
Multi Value View

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.



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

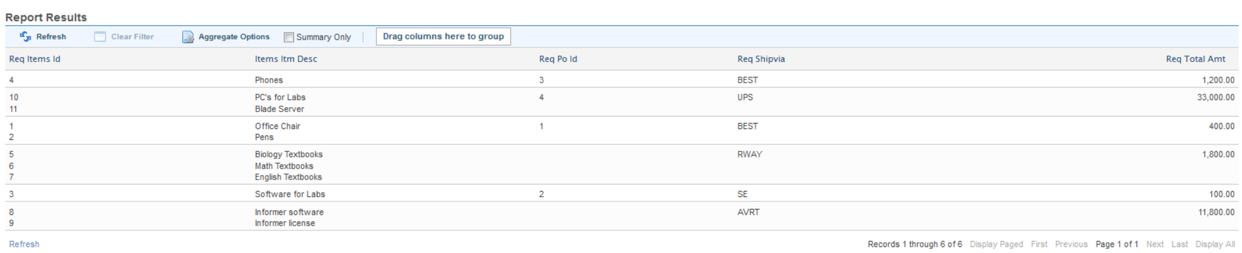
Check the boxes next to the values you want collapsed, which are the values that repeat like the Vendor Name above. The fields that are ***not*** checked become multi valued, and are handled like multi valued fields. This may require you to tweak or rewrite some calculated columns.



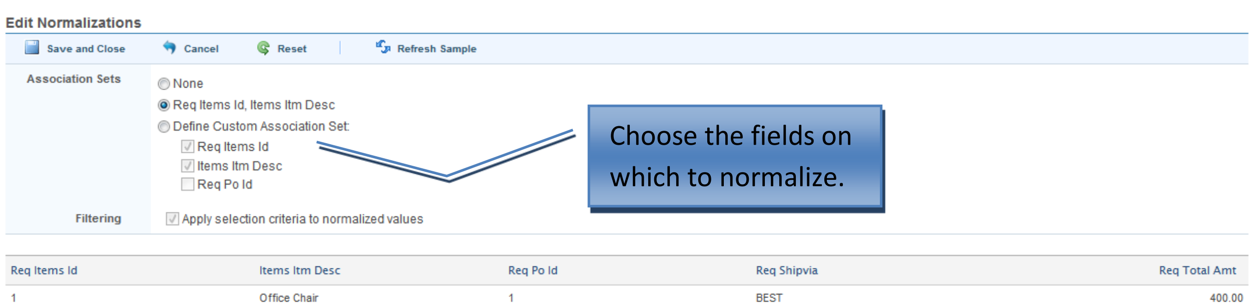
PO ID	PO DATE	Vendor ID	Vendor Name	Item ID	Item	Item Price	Quantity Ordered	Quantity Received	Line Total Price
1 1 3	Aug 1, 2009 Aug 1, 2009 Feb 15, 2010	10100	Office Space	1 2 4	Office Chair Pens Phones	$200.00 $0.20 $200.00	1 1000 6	1 1000 6	NaN
2 4	Dec 14, 2009 Mar 15, 2010	10101	Cheapbytes	3 10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

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.

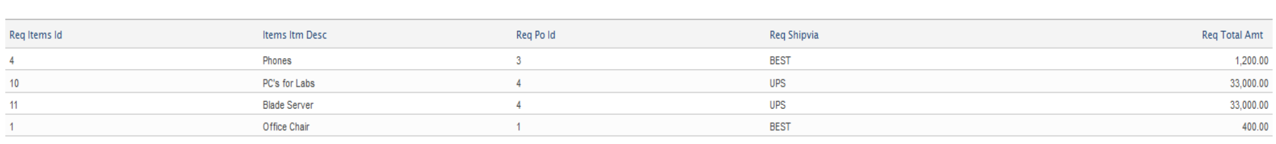


Req Items Id	Items Itm Desc	Req Po Id	Req Shipvia	Req Total Amt
4	Phones	3	BEST	1,200.00
10 11	PC's for Labs Blade Server	4	UPS	33,000.00
1 2	Office Chair Pens	1	BEST	400.00
5 6 7	Biology Textbooks Math Textbooks English Textbooks		RWAY	1,800.00
3	Software for Labs	2	SE	100.00
8 9	Informer software Informer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



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.

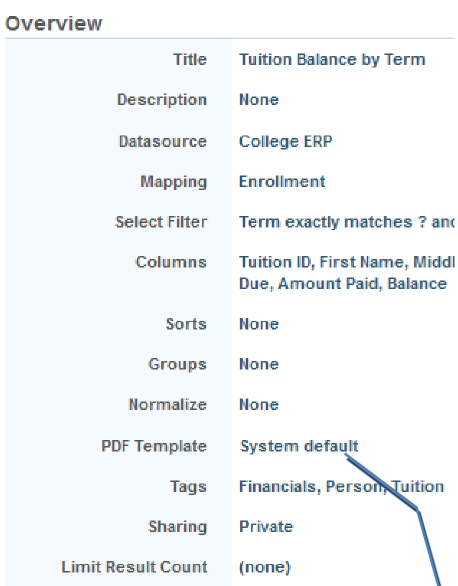


Req Items Id	Items Itm Desc	Req Po Id	Req Shipvia	Req Total Amt
4	Phones	3	BEST	1,200.00
10	PC's for Labs	4	UPS	33,000.00
11	Blade Server	4	UPS	33,000.00
1	Office Chair	1	BEST	400.00
2	Pens	1	BEST	400.00

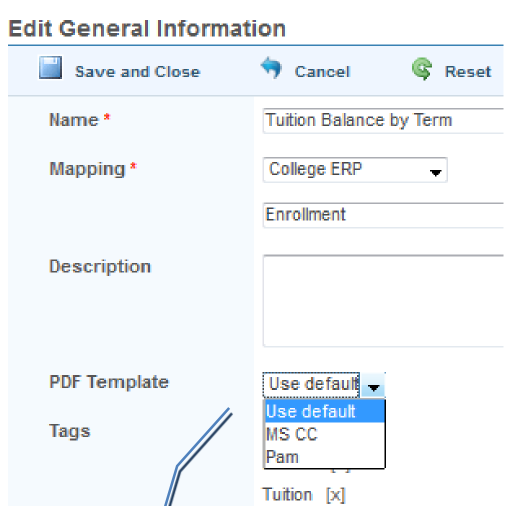
PDF Templates

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.

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



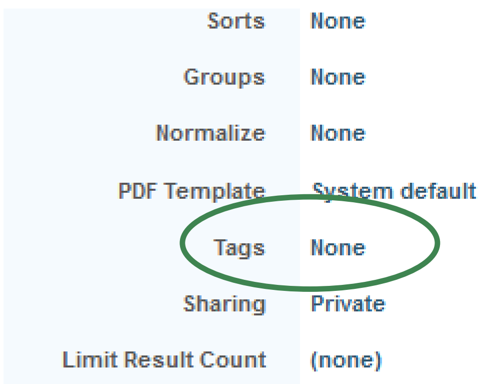
Click on System Default to choose template.

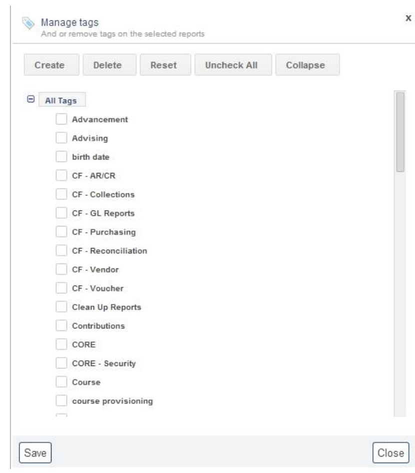


Choose template from drop down list

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.

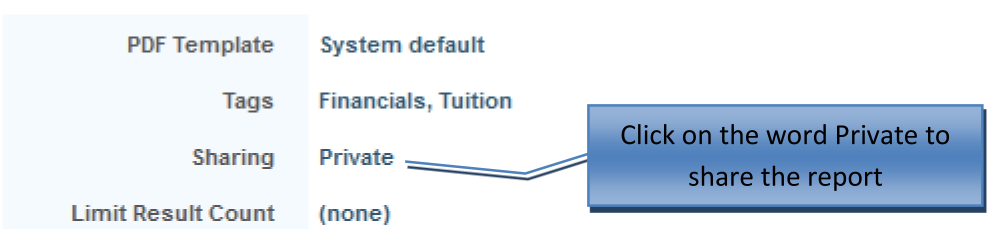




Sharing a Report

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.

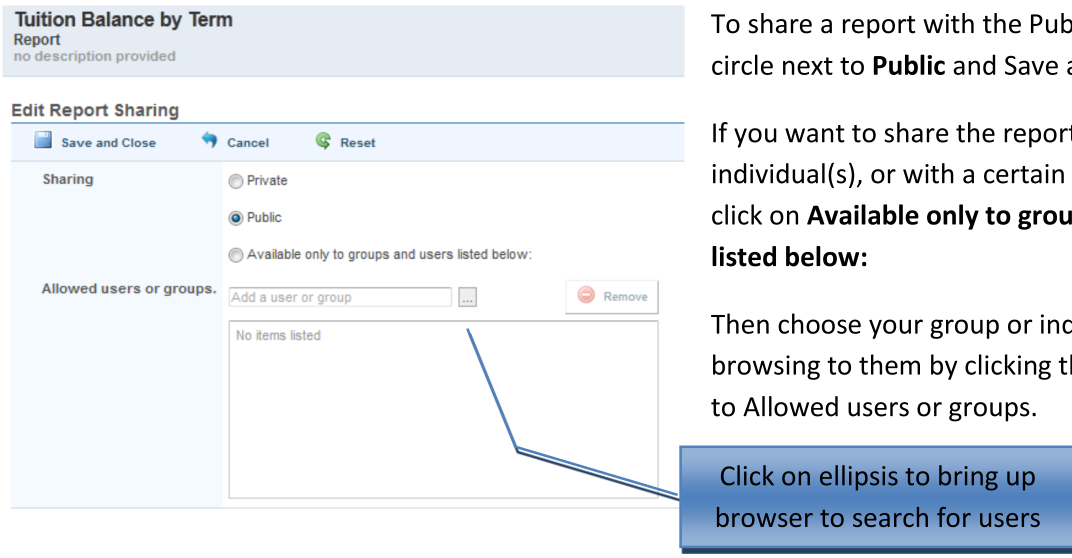
To share a report, go to the Overview on the Report Template and click on the Private link next to the word Sharing.



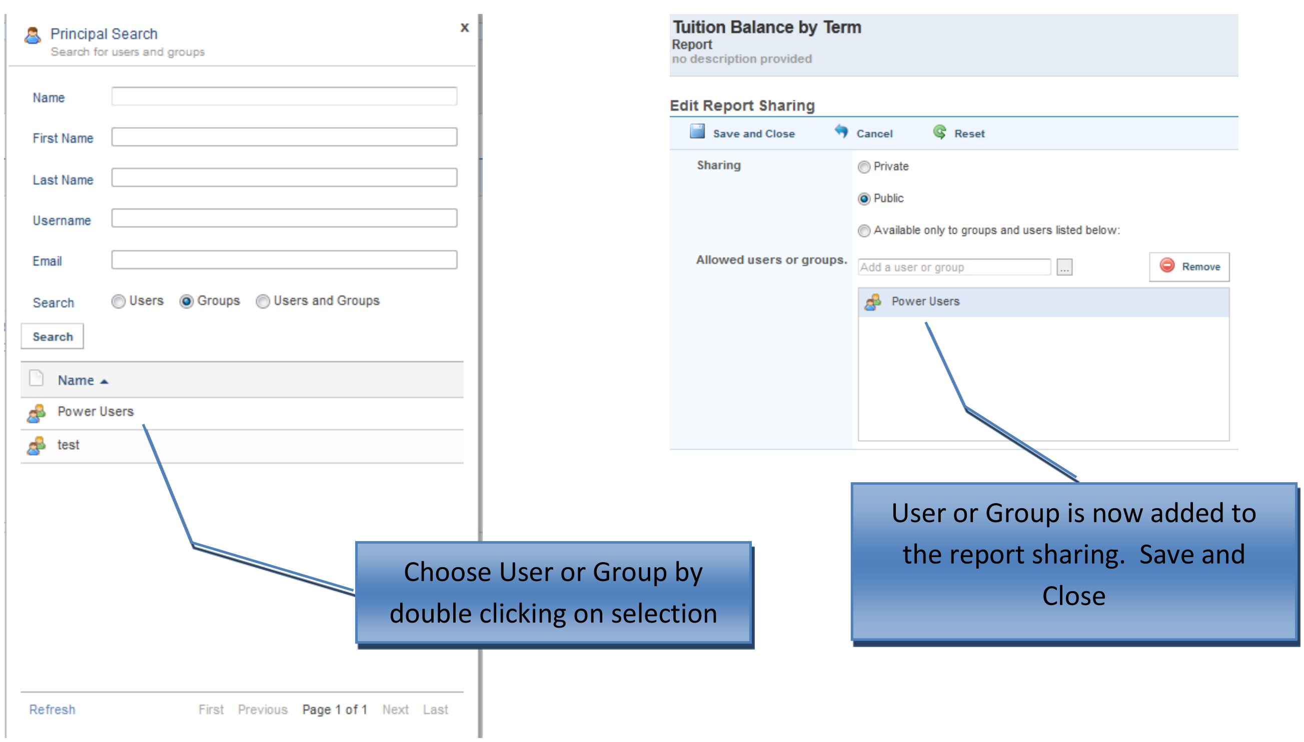
To share a report with the Public, click on the circle next to **Public** and Save and Close.

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.

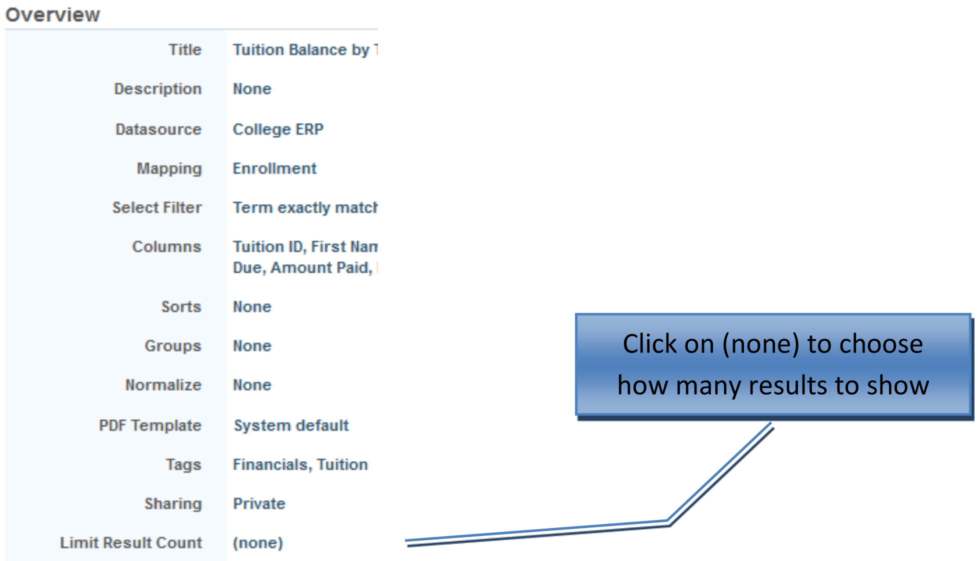


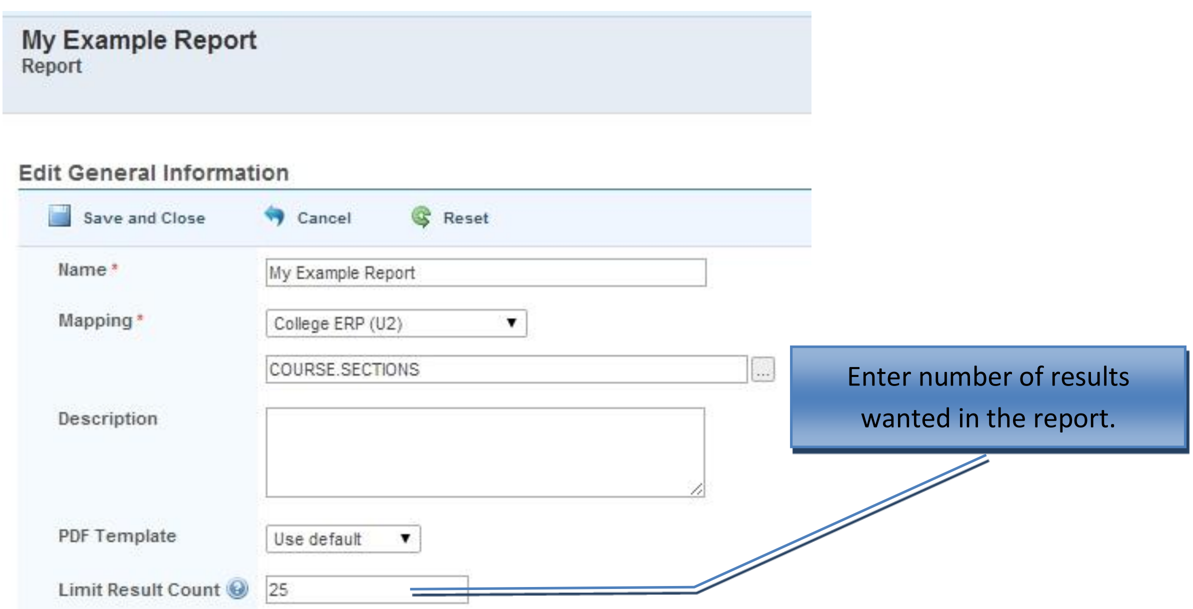
To add users choose Users, Groups, or Users and Groups, and click search. To filter the search, fill in one or many of the fields above and click search. Double click on the user or group to get back to the Edit Report Sharing screen. Click Save and Close.



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.



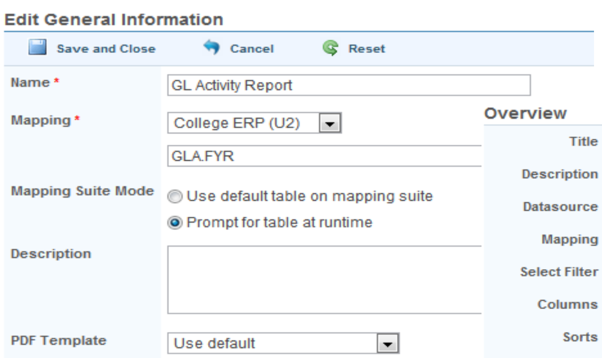


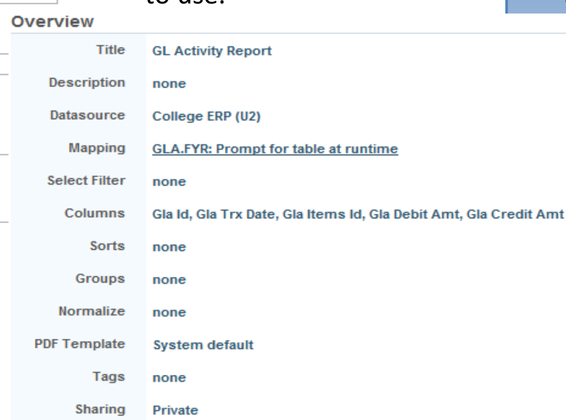
Using Mapping Suites

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.

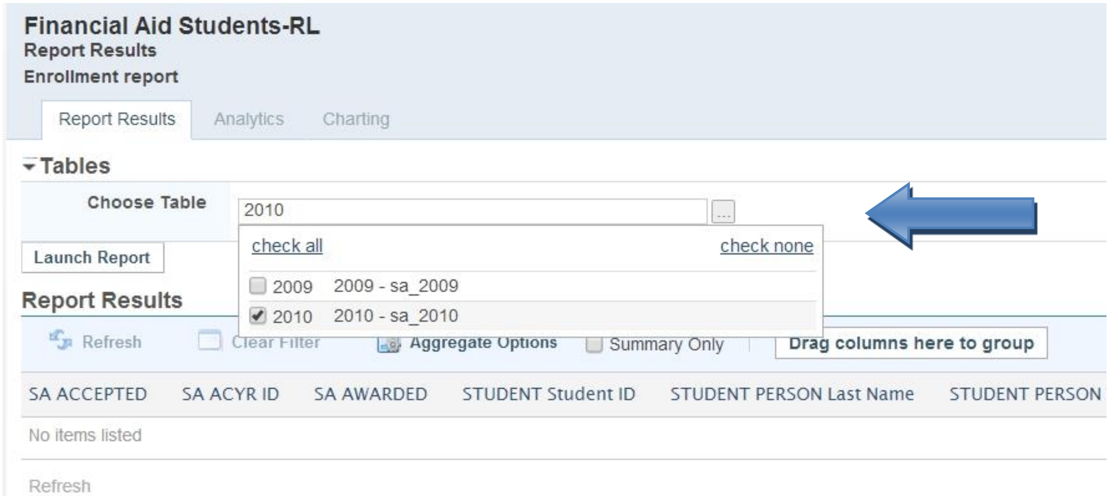
> *Refer to the Informer user guide for instructions on how to define a mapping suite.*

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.





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.



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

It's your data. We help you use it.

Informer™ Web Reporting

Chapter 4: Launching Reports

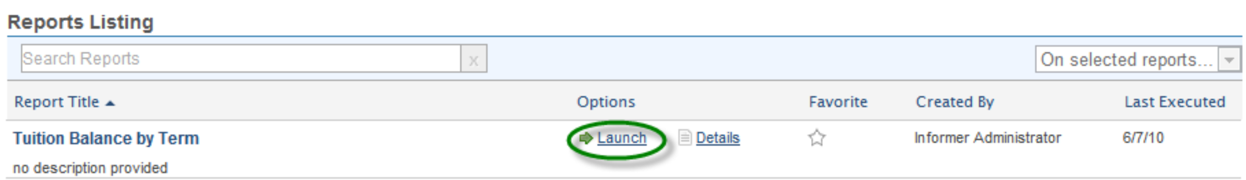
In This Chapter

In this chapter, we will:

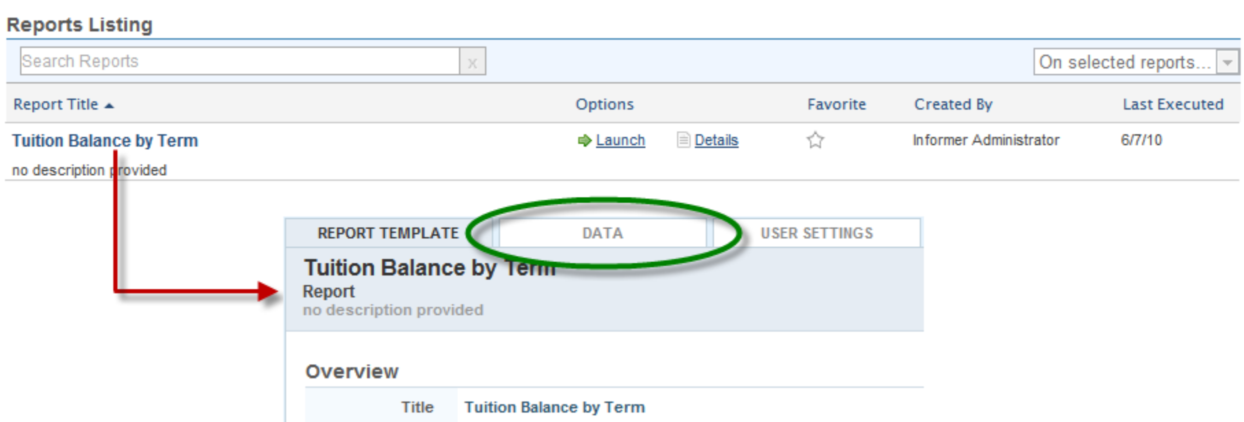
- Launch a report
- Adjust the report results
- Export the report results
- Archive the report
- Perform analytics on report results
- Create charts from report results

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.

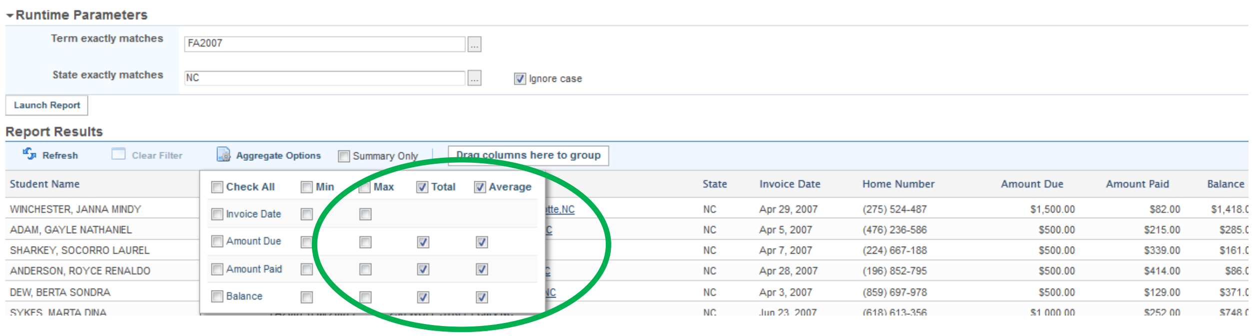


The second method is using the Data tab on the Report Template page. Click on the report title to go to the Report Template page. Then click on the Data tab.

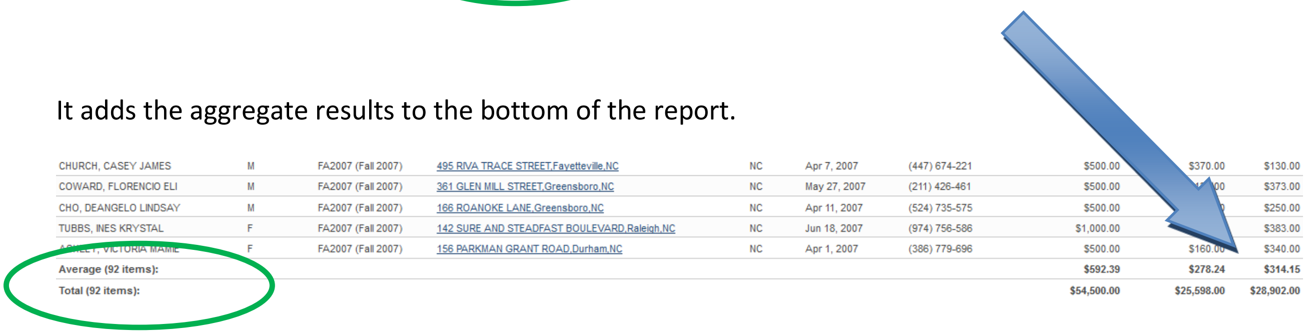


Some reports may require you to enter some criteria in order to filter the results properly. You will be asked for the runtime parameters before the report is launched. If you want Informer to ignore the case of the text you enter, check the box by "Ignore case".

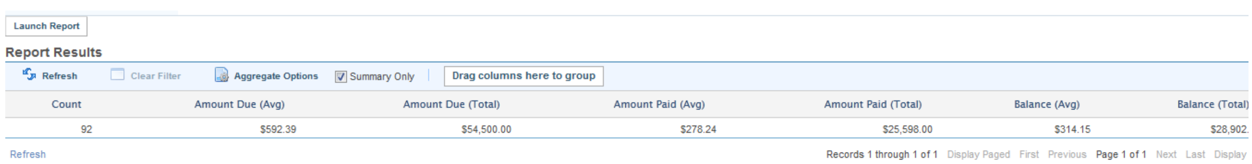
Another feature available when launching a report is to use the Aggregate Options selection. It gives you the choice to find the Total, Average, Min, or Max of a column.



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



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.



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.

Informer will generate the report and display the results.

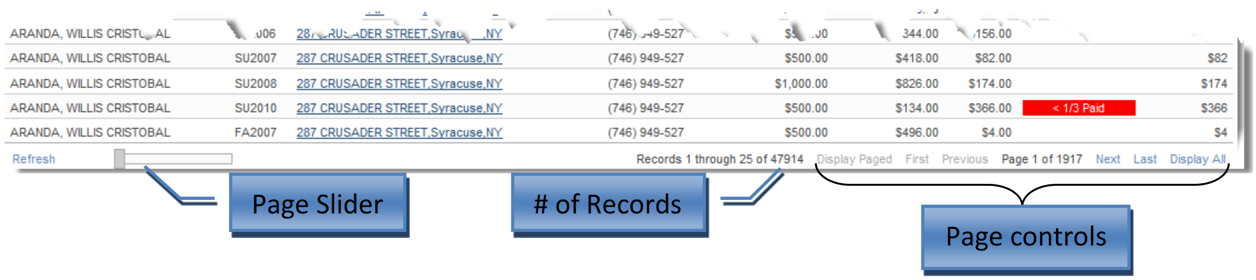
Report Results

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
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.



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”.

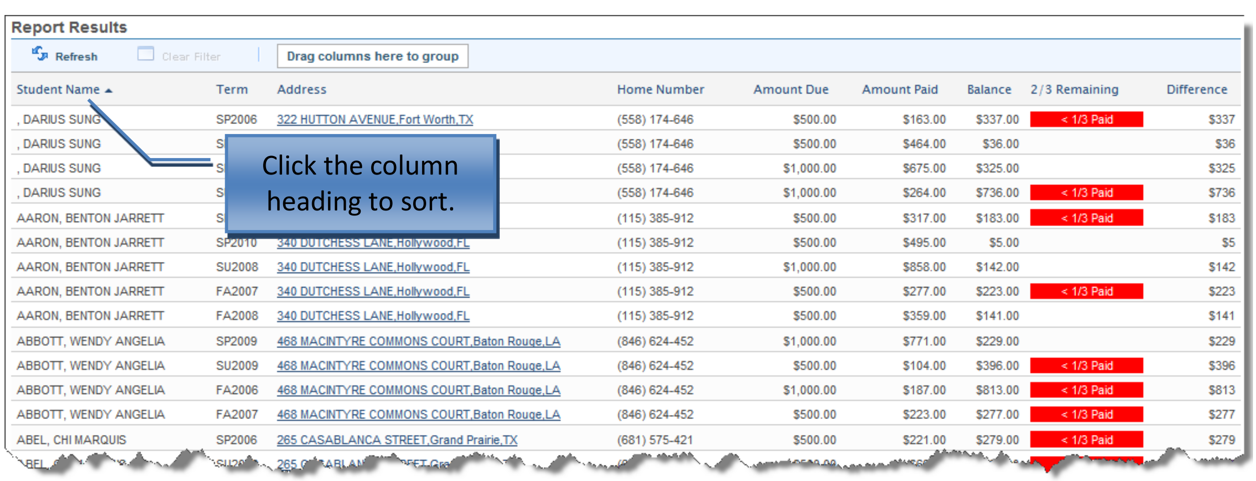
Adjusting the Report Results

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

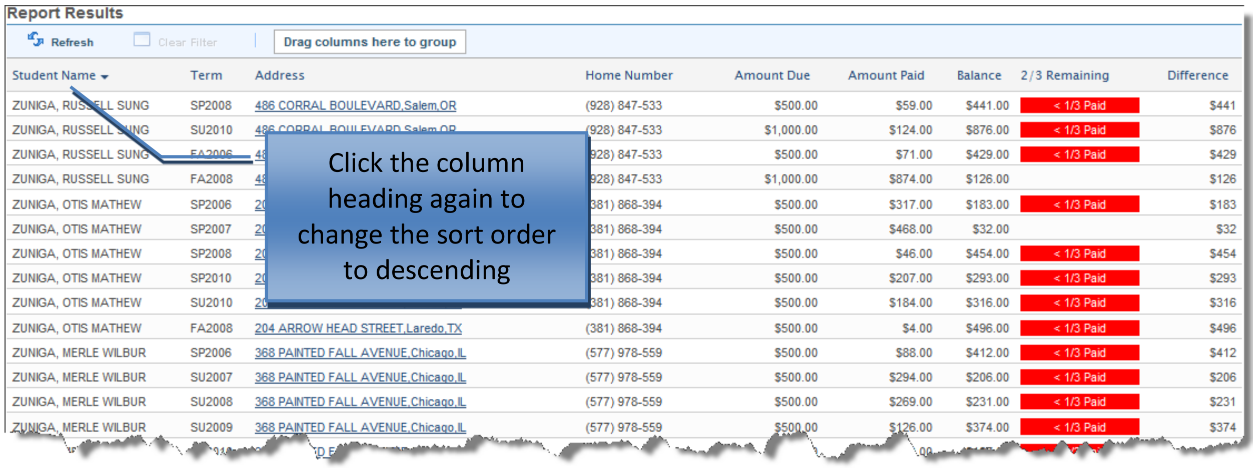
- Changing the sort order
- Reordering the columns
- Grouping the results

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.

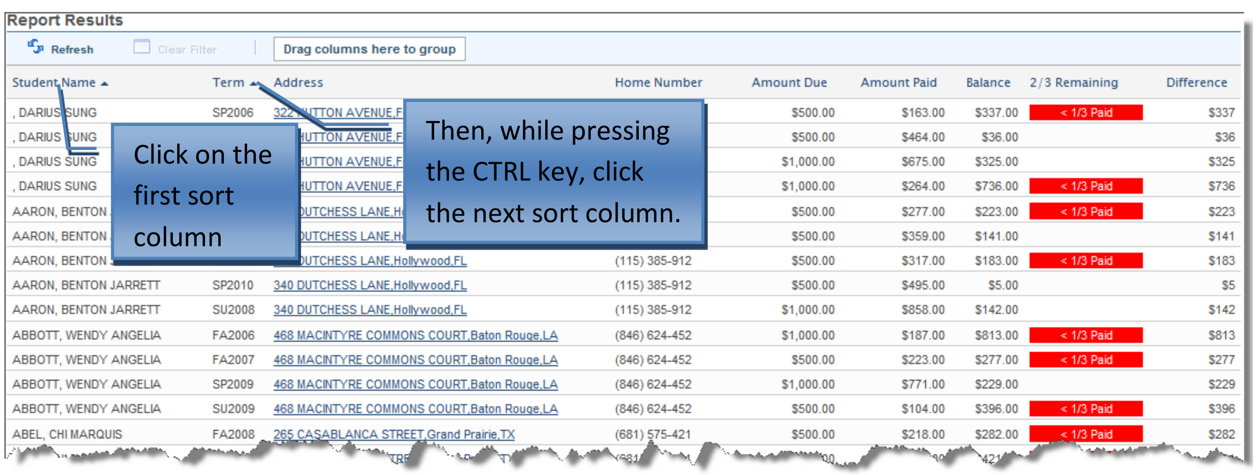


Notice the arrow that appears next to the Student Name heading. This means the report is sorted in ascending order by Student Name. To change the sort order to descending, click on the Student Name heading again.



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

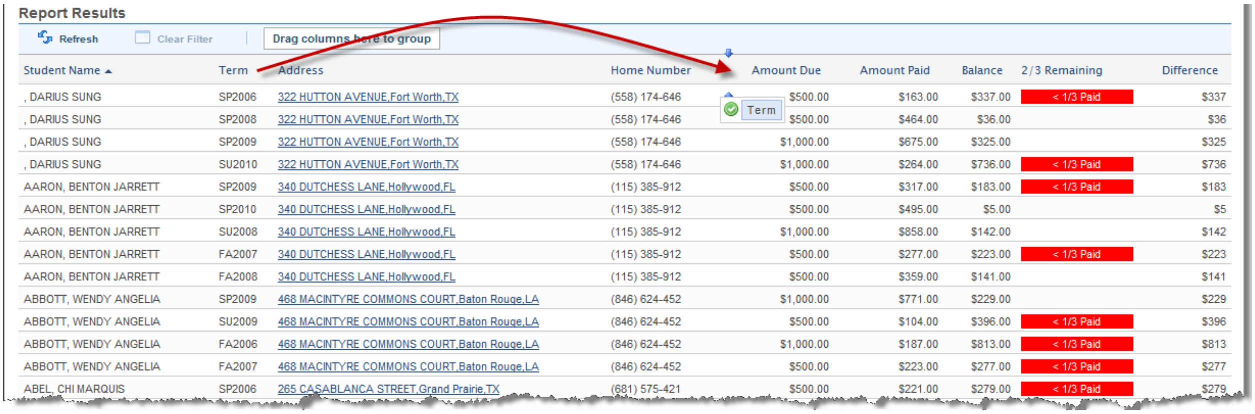
You can choose more than one column to use in sorting by pressing the Ctrl (Control) key on your keyboard while clicking the additional column headers. For example, if you wanted the above report to be sorted by Student Name and Term, click the Student Name column, press and hold the Ctrl key, and then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



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.



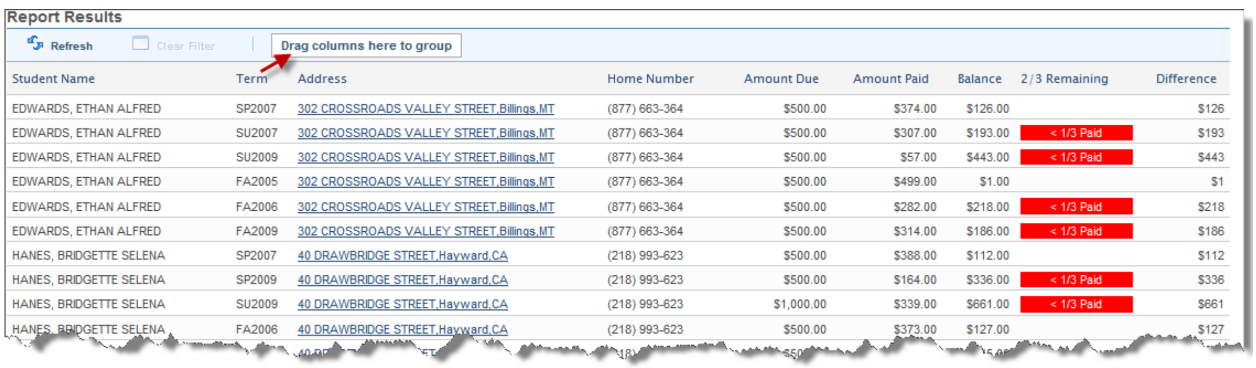
Report Results

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	(681) 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”.

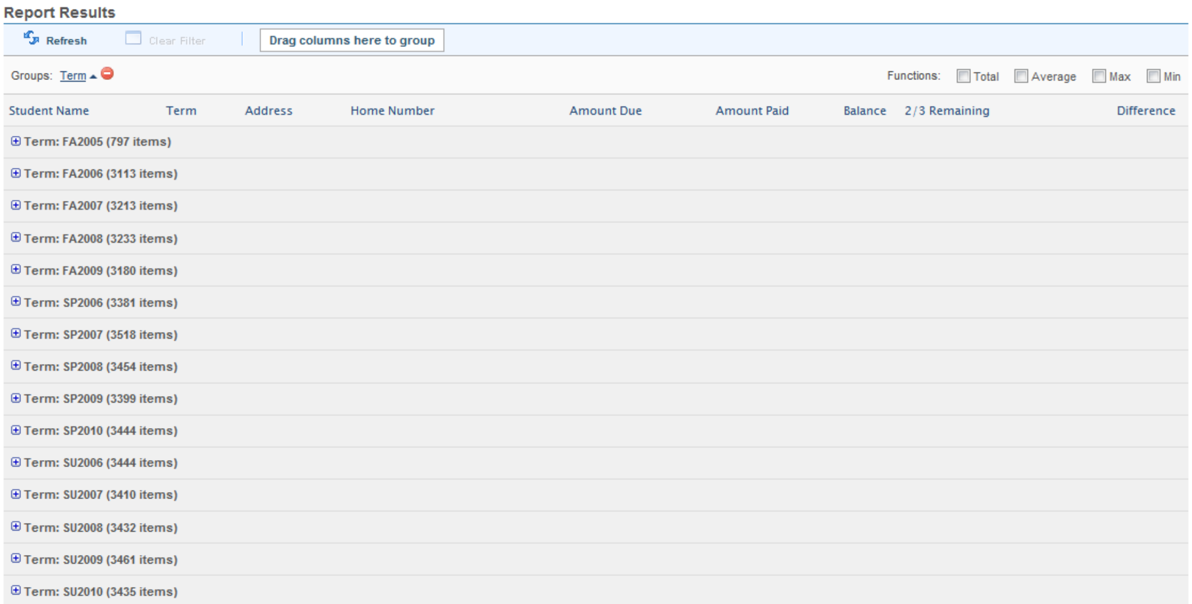


Report Results

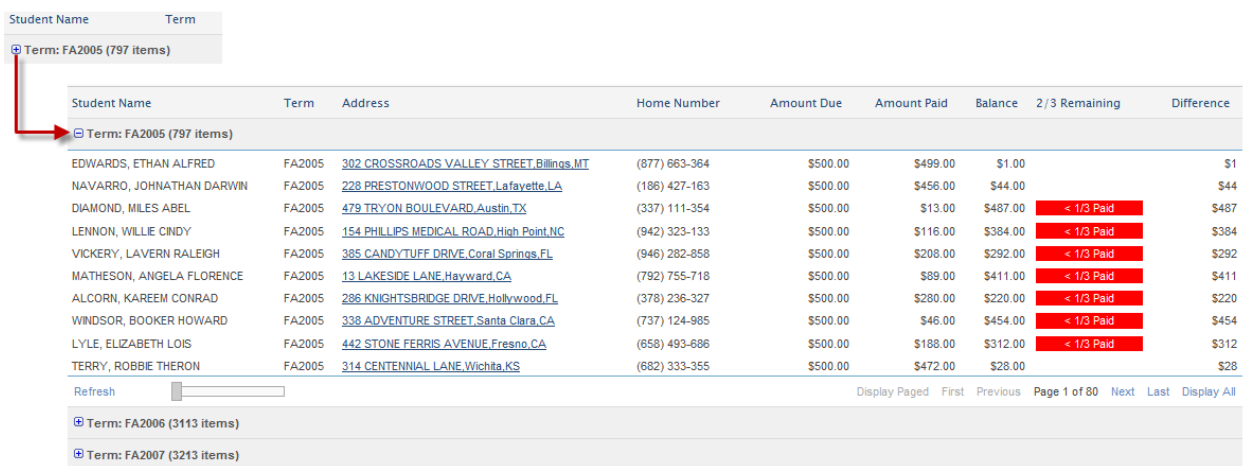
Refresh | Clear Filter | Drag columns here to group

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.

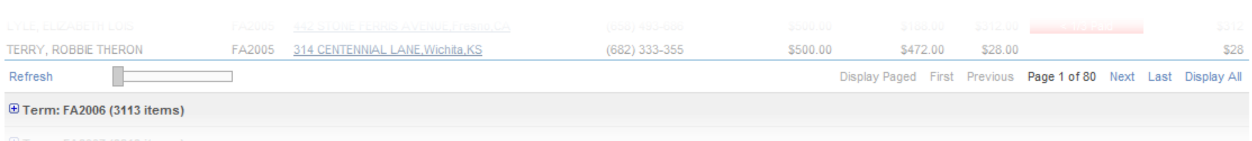


In order to see the detail within a group, click on the plus sign by the group. Informer will expand the group to show the detail.



Student Name	Term	Address	Home Number	Amount Due	Amount Paid	Balance	2/3 Remaining	Difference
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
DIAMOND, 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

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

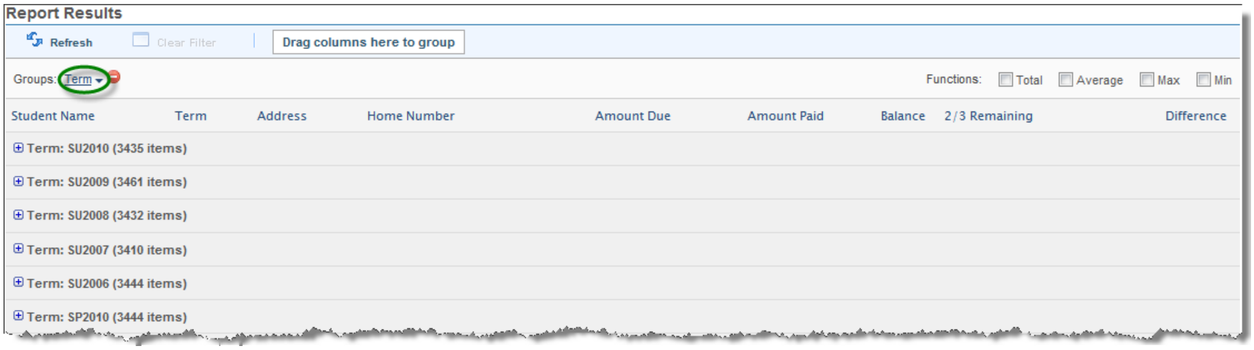


To collapse the group, click the minus sign beside the group.

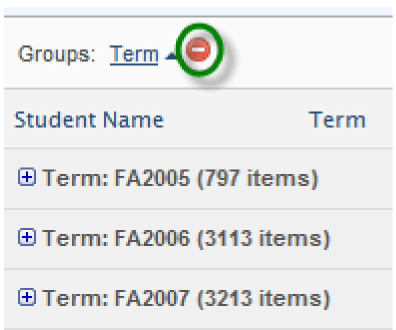
Student Name	Term	Address	Home Number	Amount Due	Amount Paid	Balance	2/3 Remaining	Difference
⊟ Term: FA2005 (797 items)								
EDWARDS, ETHAN ALFRED	FA2005	302 CROSSROADS VALLEY STREET,Billings,MT	(877) 663-364	$500.00	$499.00	$1.00		$1
NAVARRO, JOHNATHAN DARWIN	FA2005	228 PRESTONWOOD STREET,Lafayette,LA	(186) 427-163	$500.00	$456.00	$44.00		$44
DIAMOND, 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.



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



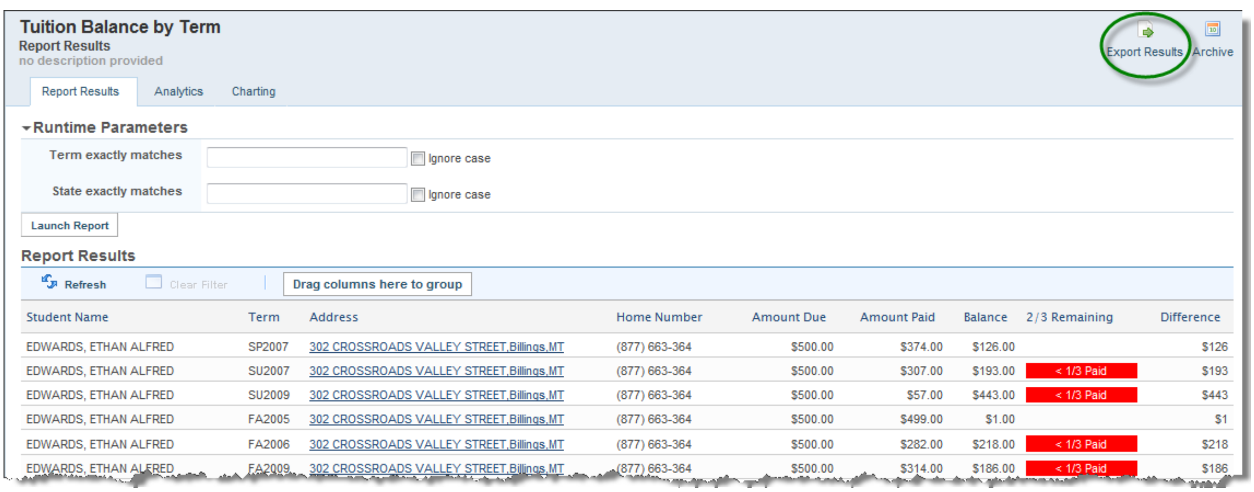
Exporting the Report

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)

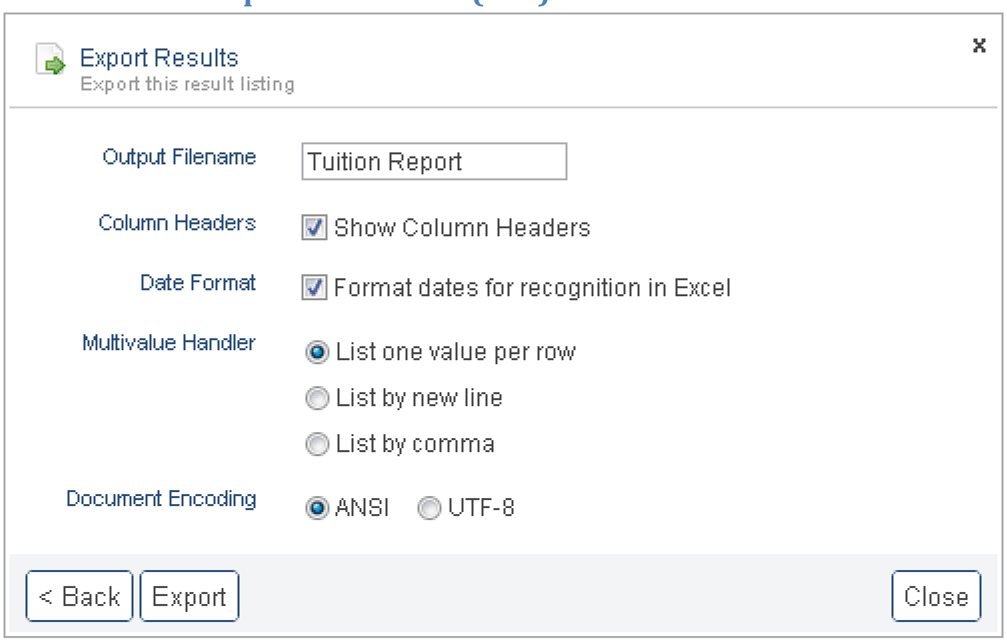
The most commonly used formats are Excel CSV, PDF, and Live Excel, which we will cover in this training. For the other formats, refer to the Informer user's guide for details on their settings.

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



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

Excel Comma-Separated Values (.csv)



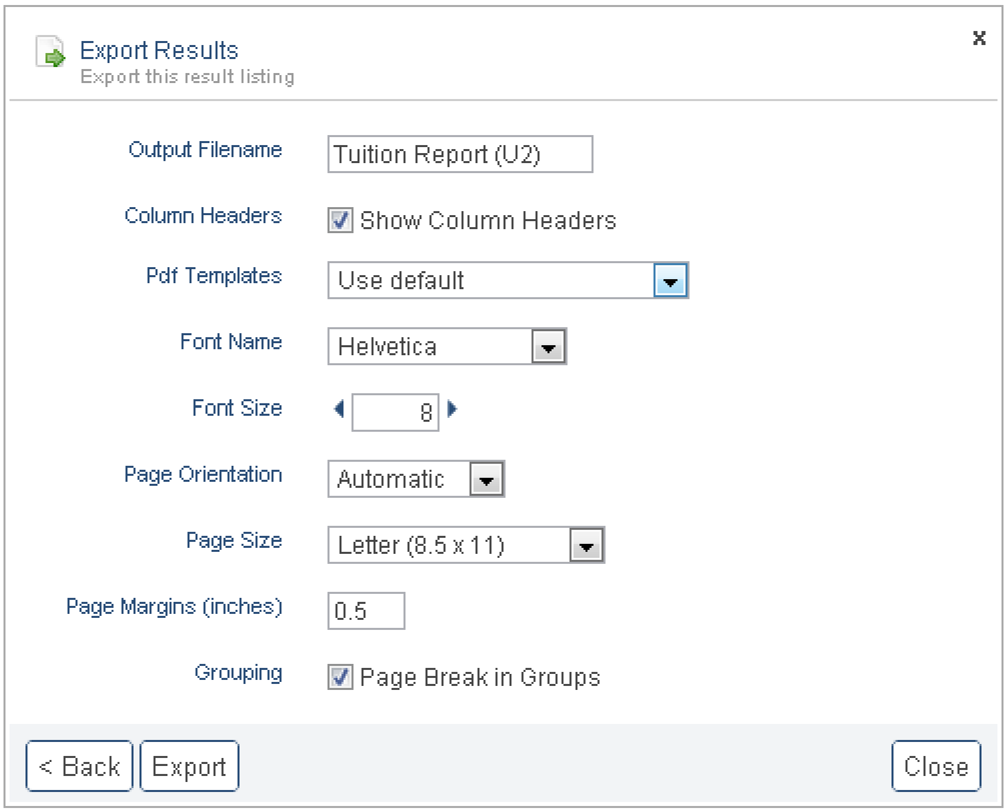
Choose the appropriate settings for the spreadsheet:

- 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



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.

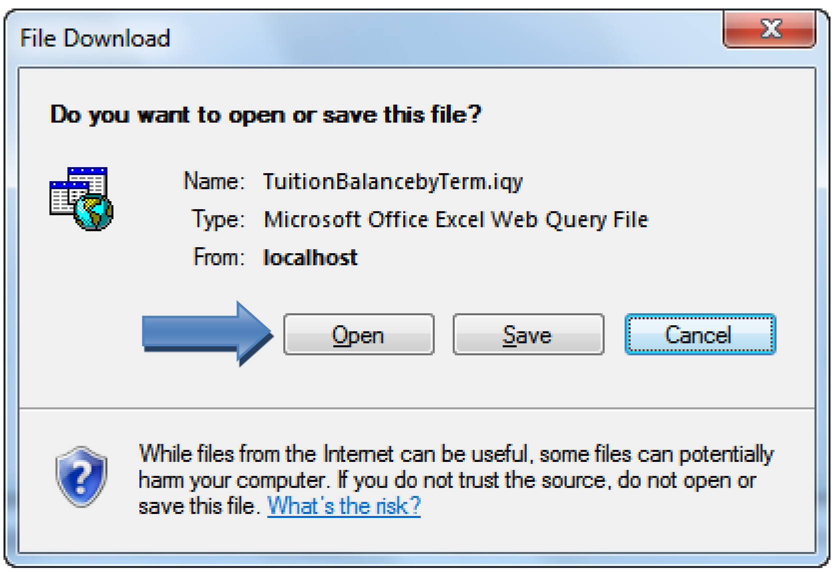
- Informer can automatically adjust the page orientation depending on the amount of data listed in the report, or you can specify landscape or portrait layout.
- Adjust the page size and margins to the appropriate values.
- To force a page break before each new group in the document, leave the “Page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

Click the Download Now button to download the PDF document.

Live Excel

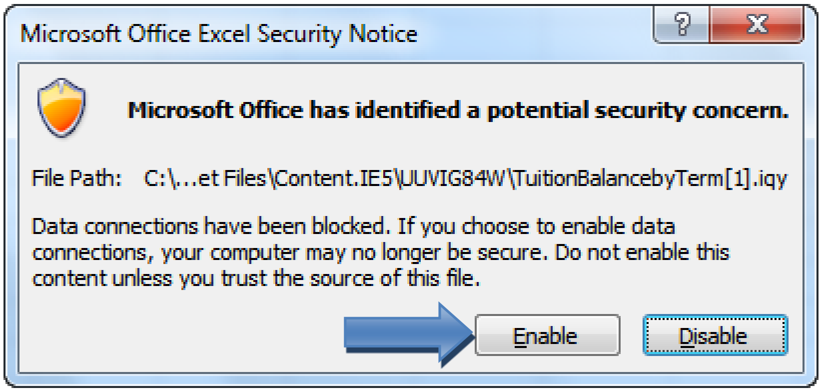
A Live Excel allows you to generate Informer reports from within Excel. You do not need to have a login to Informer in order to use a Live Excel spreadsheet once it has been created. The report is run in Informer as the user who created the Live Excel file. Each time you access the Live Excel spreadsheet, 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.

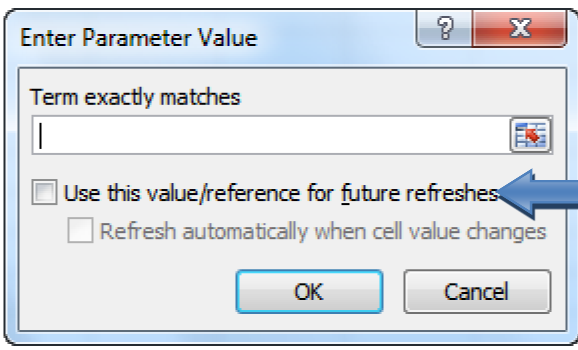
Click Open to start Excel. Depending on your security settings, you may see a warning window appear.



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

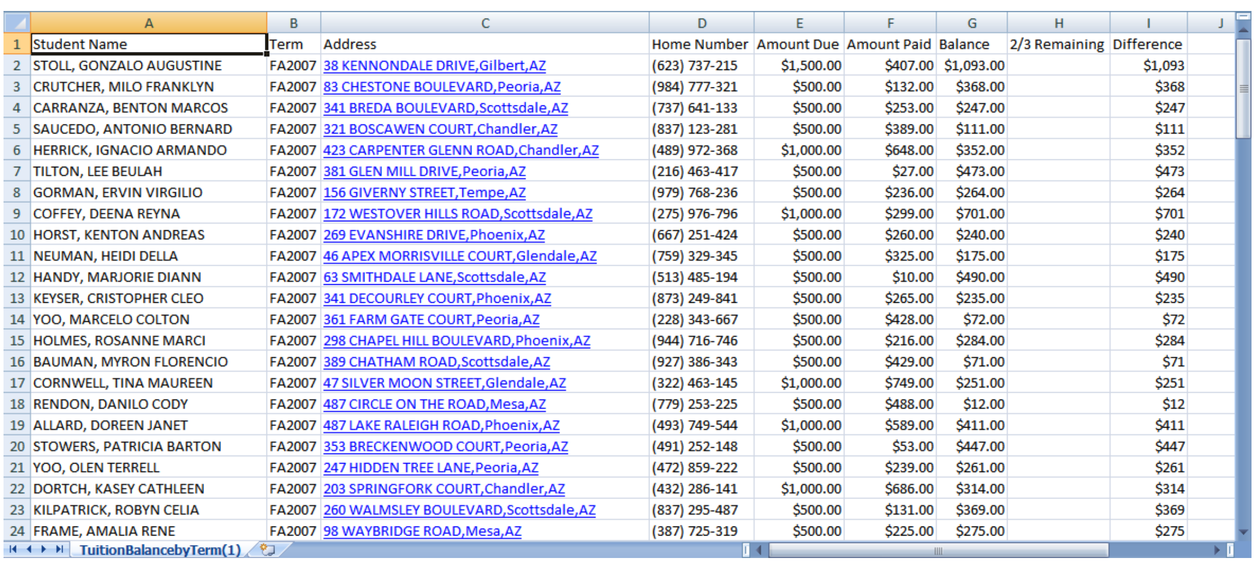
Click Enable to allow the data connection to be established.

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 BREDA 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 EVANSHIRE 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	

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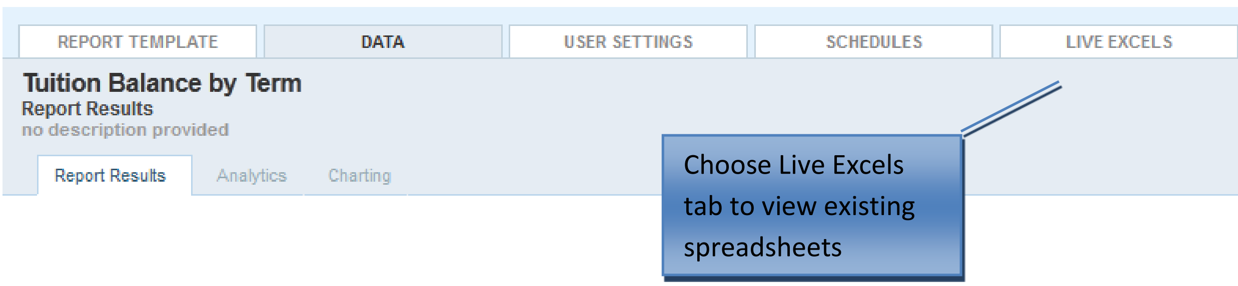
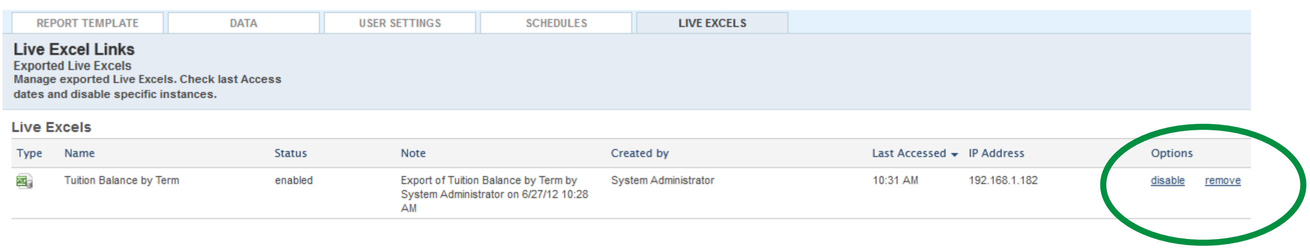
You can save the spreadsheet for later use. If the data on the report has changed, you can either re-open the spreadsheet, or with the spreadsheet open, click on the Data tab and choose Refresh All.

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



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

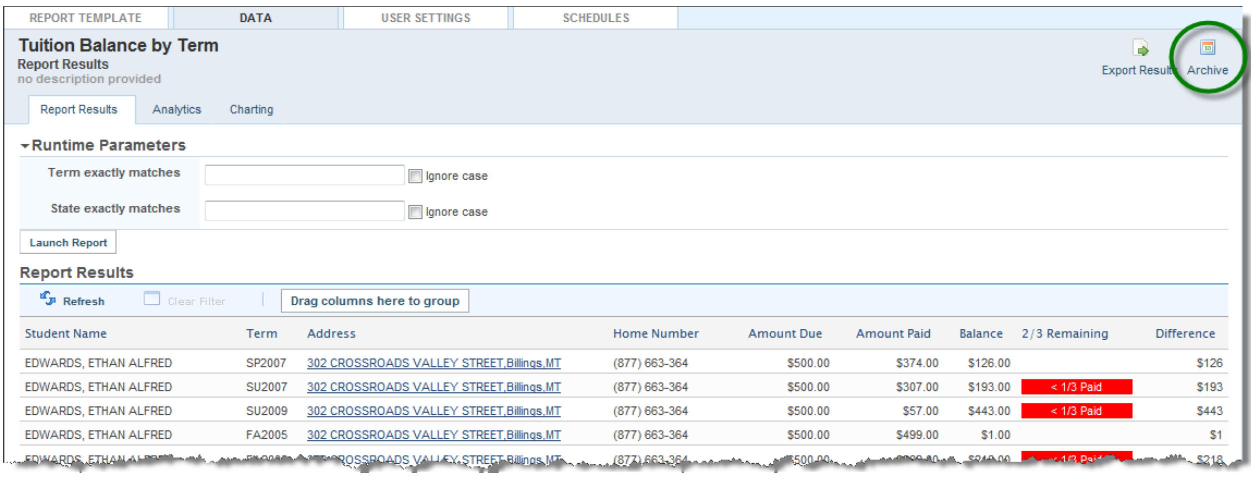


Archiving

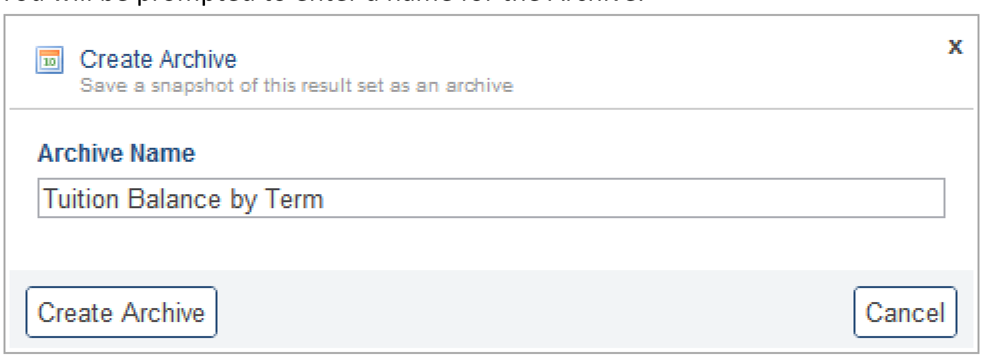
Archiving allows you to create a snapshot of a report at that moment in time. The report results are stored on the Informer server. Access to the archives, as well as what data can be viewed on the archived report, is controlled by group and user security settings. Any security set on the report does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

Creating an Archive

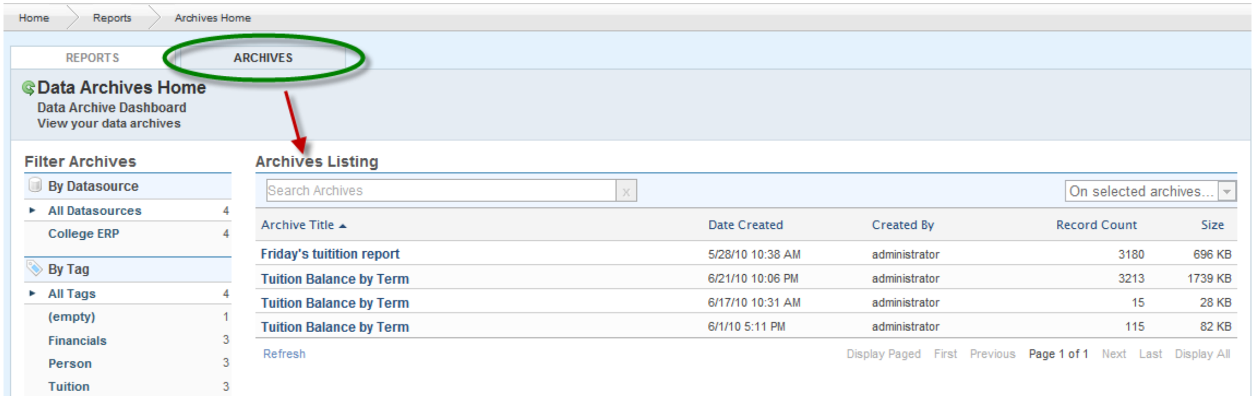
To create an archive of a report, click on the Archive link while viewing the report results.



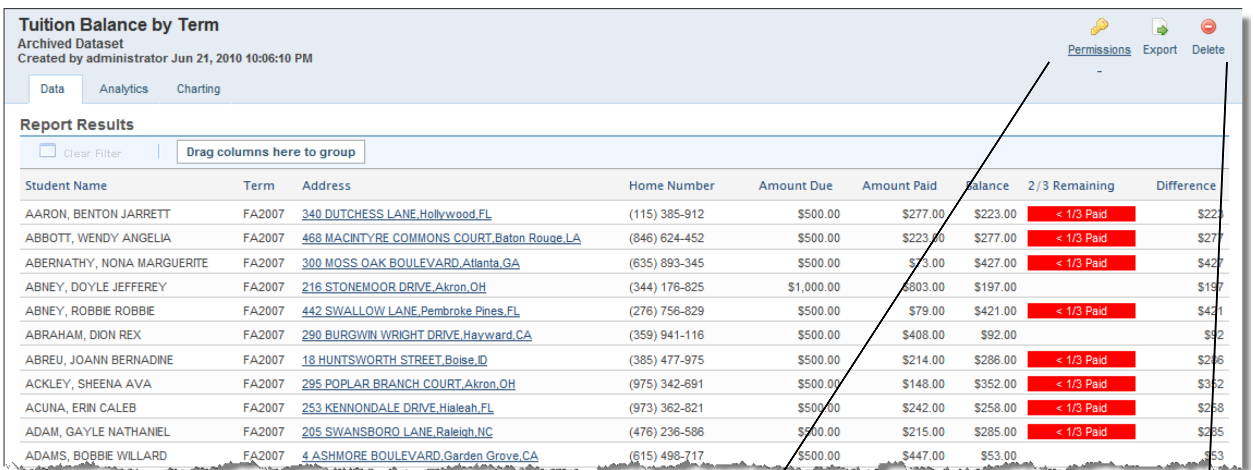
You will be prompted to enter a name for the Archive.



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.



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.

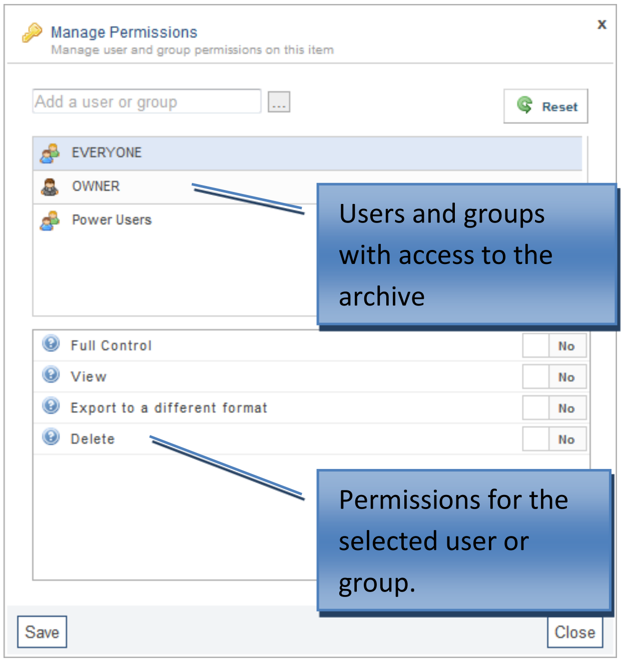


Depending on the level of security you have been given for archives, you can share, export, or delete the archive.

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.

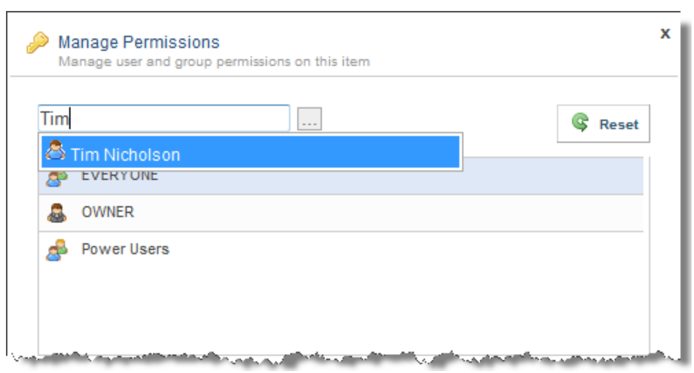


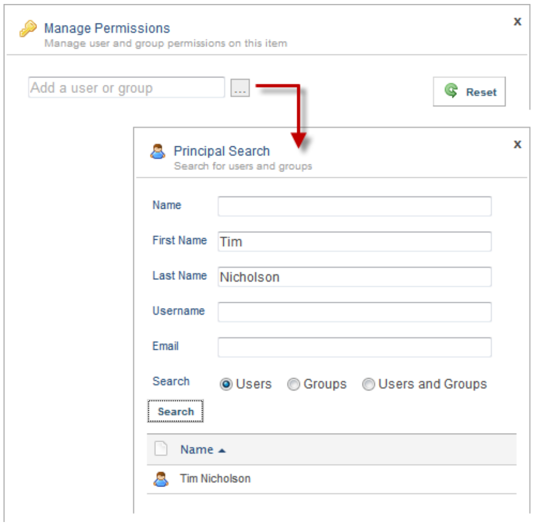
You must have Full Control access to all archives or the specific archive in order to set permissions.

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.

The padlock indicates that the default permission has been overridden.

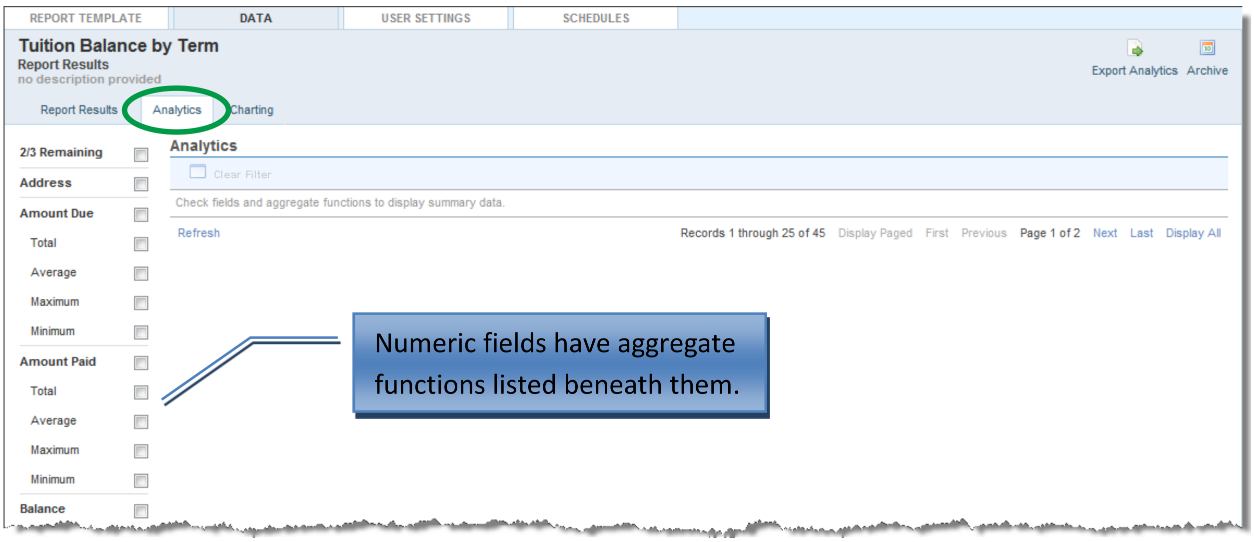
For a more detailed explanation of security and permission settings, see the Security section of the training manual.

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

Analytics

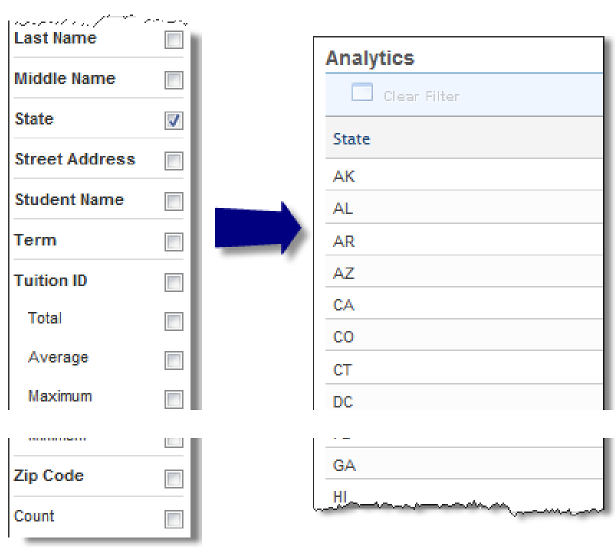
The analytics feature of Informer allows you to summarize and aggregate the data on your report in a pivot table like format. This tool becomes especially useful when you need to create summaries of data in a very large report. The analytics data can be sorted, arranged, exported, and archived like any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

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

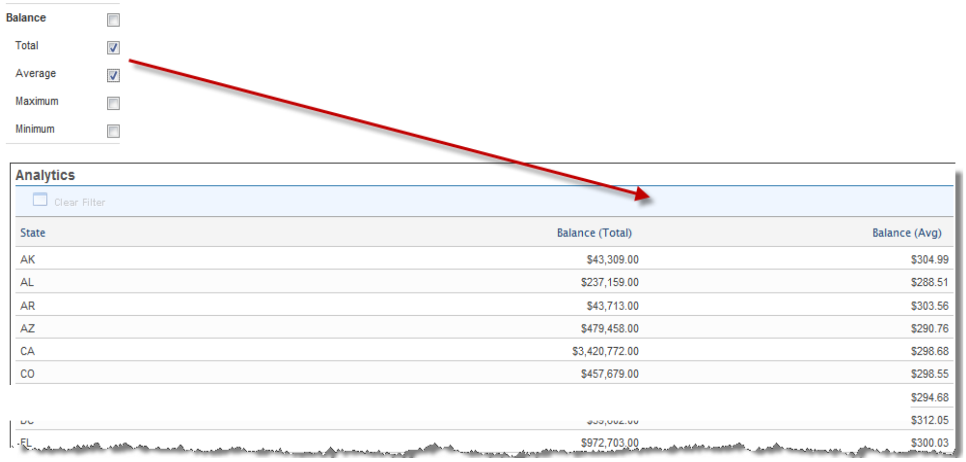


On the left side of the analytics panel is the list of fields used on the report, regardless of whether they are visible or hidden. Numeric fields can be aggregated into totals, averages, minimums and maximums.

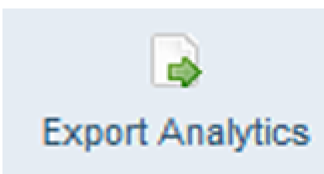
To add a column to the report, click the checkbox next to the field. Informer will list the unique values from the column. We have selected the State column, and in the analytics panel, Informer has listed the unique State codes from the report.



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.



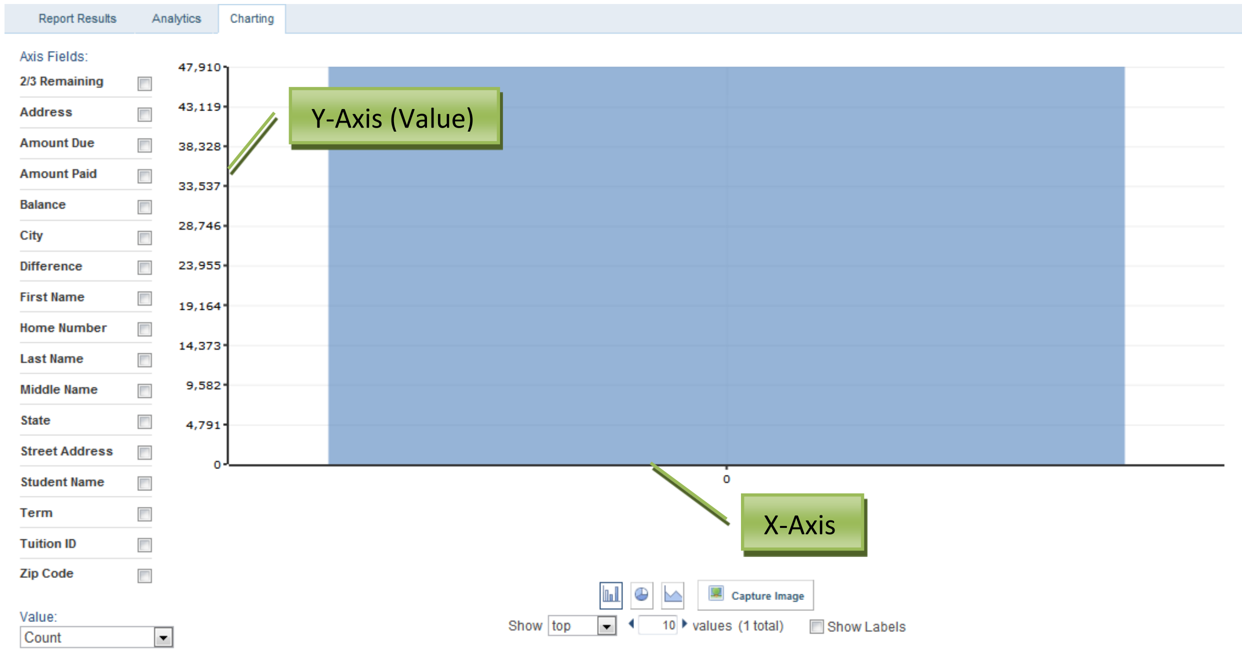
To export the analytic report, click on Export Analytics link.



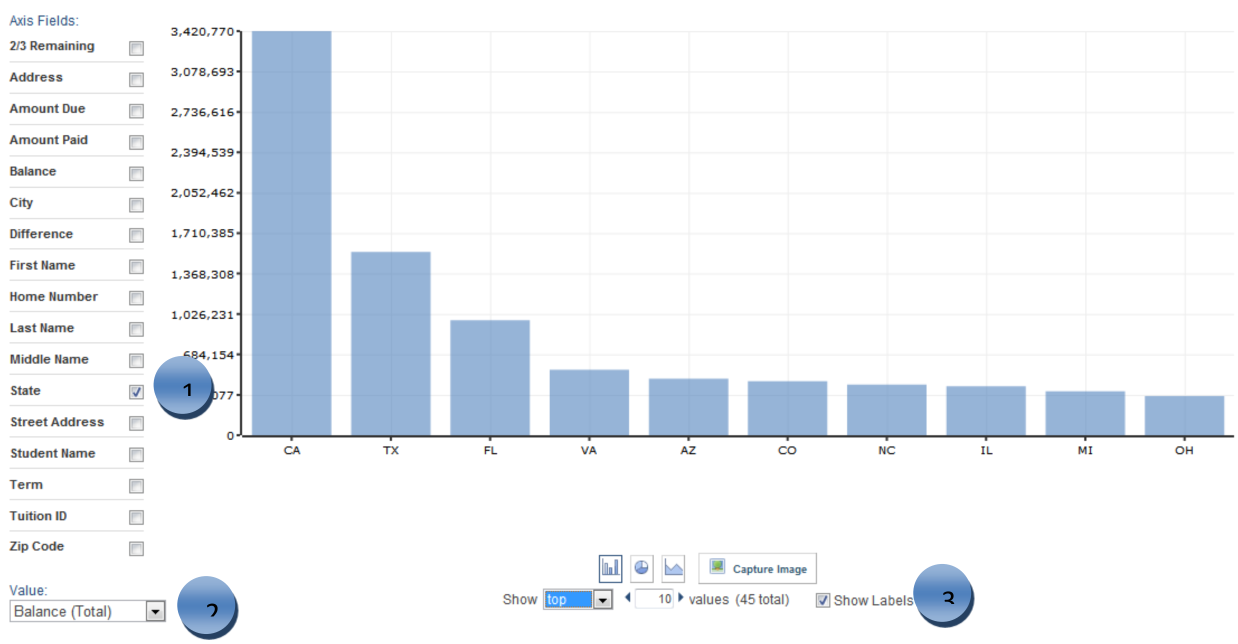
Fields that are hidden on the report will not export, even though they are available in the analytics panel.

Charting

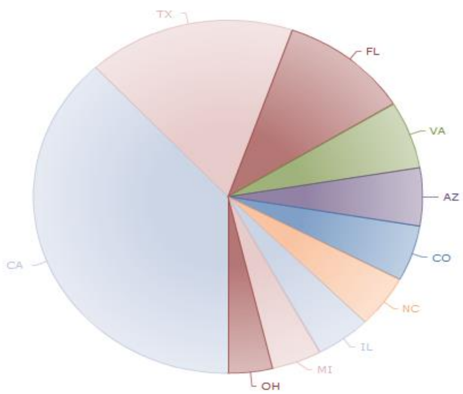
Charting works in much the same way as analytics, except the output is in chart form instead of report form.

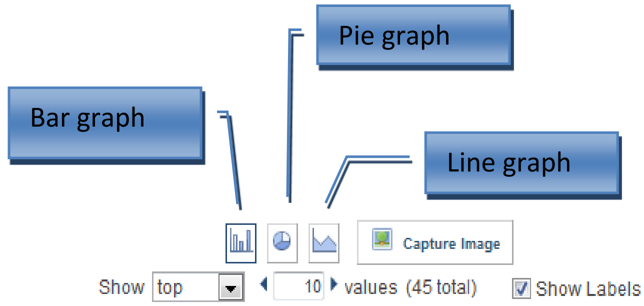


The default chart shows a total count of the records on the report. To choose the field that will be used on the X-axis of the report, click the checkbox by the appropriate field. Then, in the Value dropdown, choose the field and aggregate function to be used for the Y-axis.



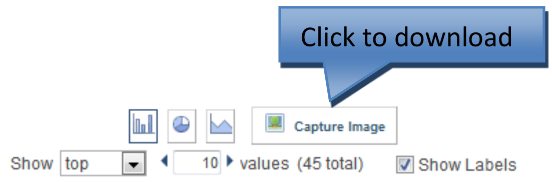
Informer provides for 3 different chart formats: bar, pie, and line.

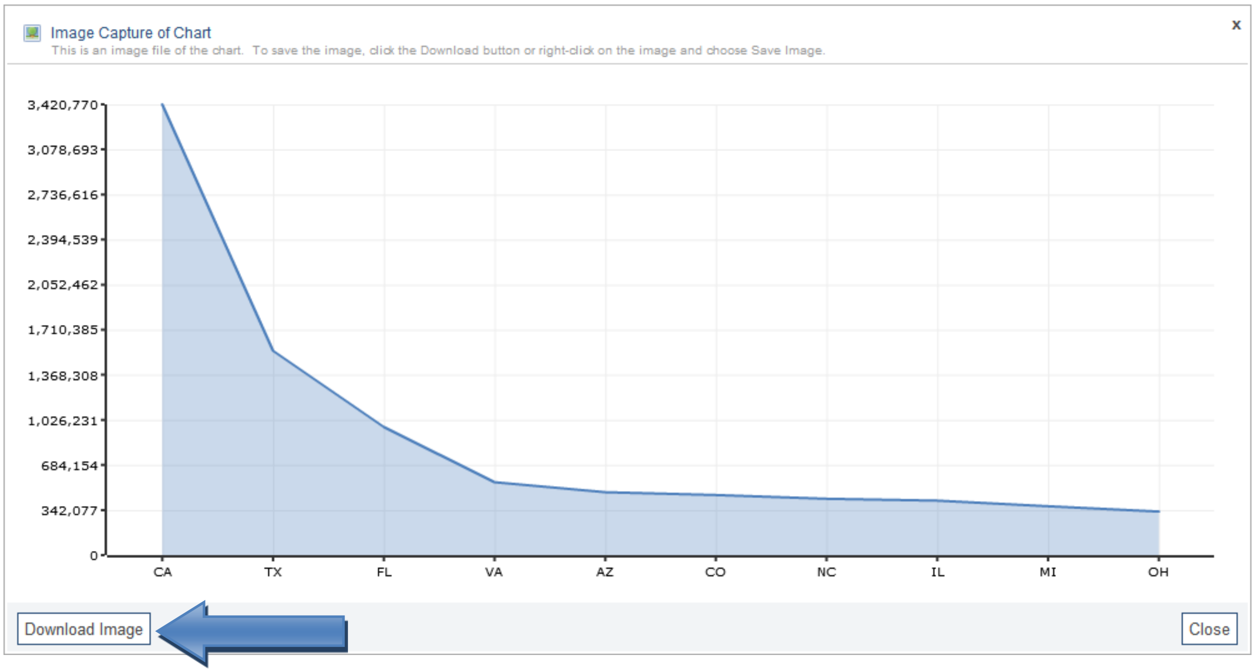




Click the appropriate chart type to change the chart.By default, Informer will display the top 10 values in the chart. To adjust this setting, change the number of values to display, or change the dropdown from Top to either All or Bottom.

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.

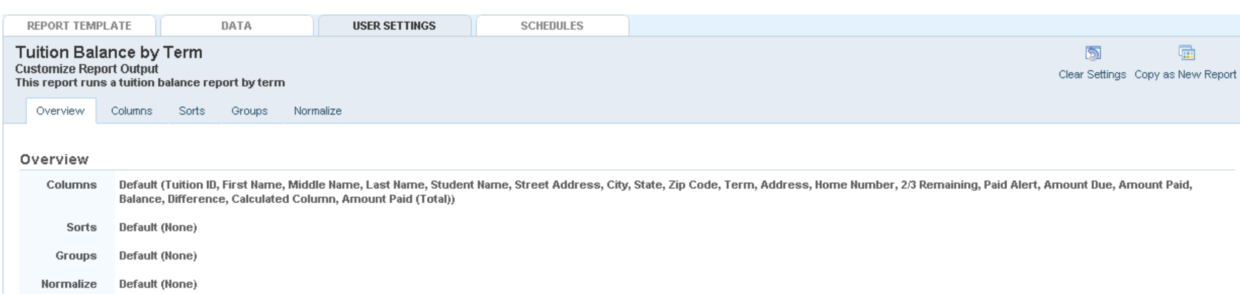




Click on the Download Image button to save the file. Once you have finished downloading the image, click the Close button.

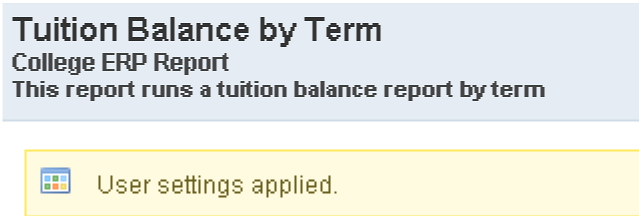
User Settings

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.



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.

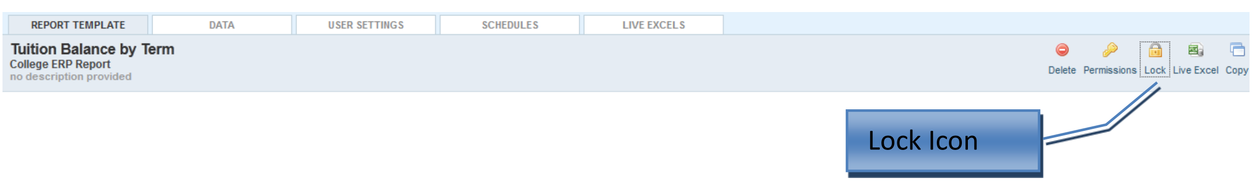
If you wish to make your version of the report available to others, create a new report from your user settings using the 

option. Or, you can clear your user settings using the 

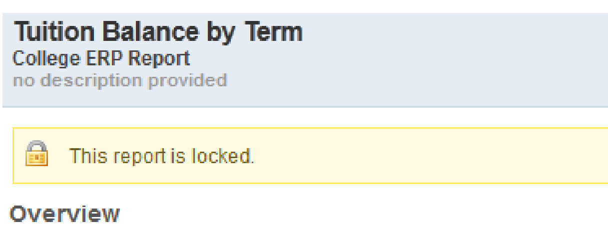
option.

Locking Report

Informer also allows the owner of the report the ability to lock the report so that no other users can make changes accept 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.

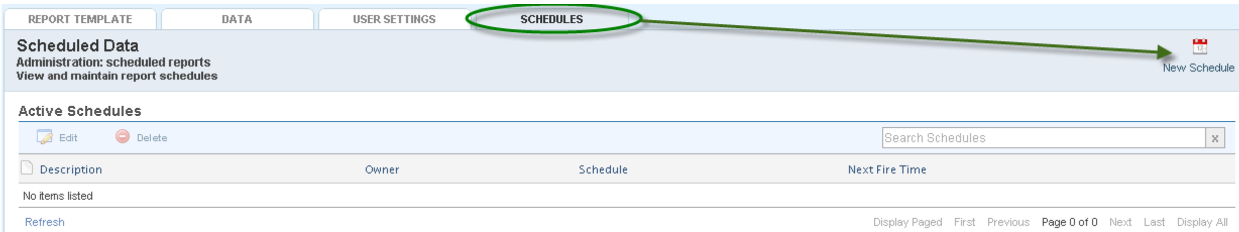


The below message will appear on a report when it has been locked by the owner of the report.



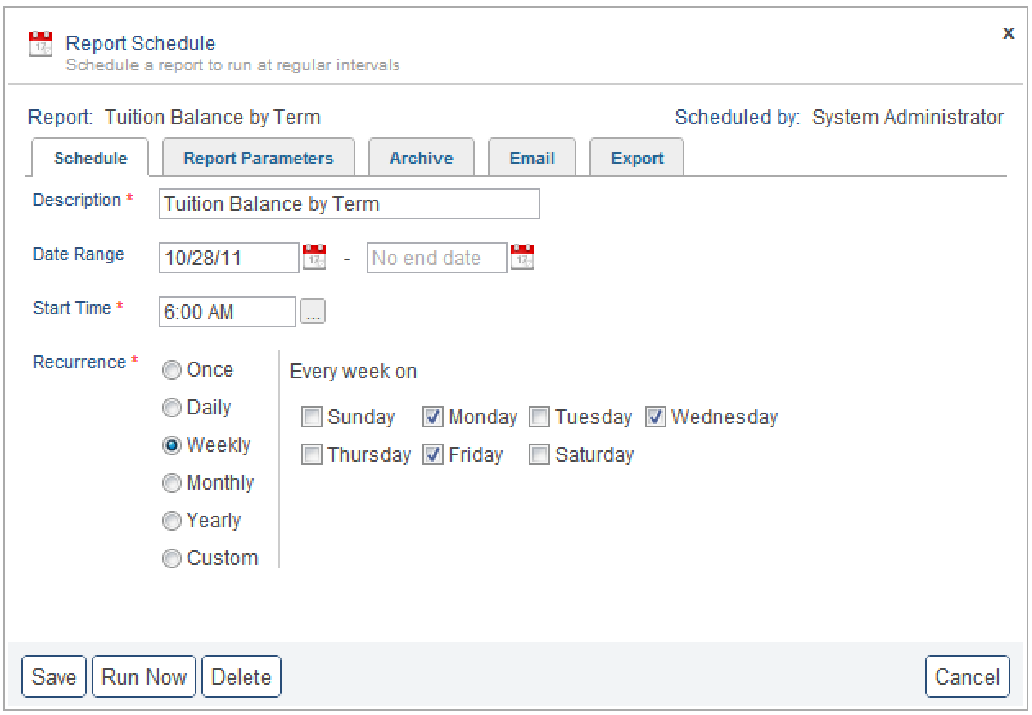
Scheduling

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.



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.

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

Start Time

Enter the time you wish to the report to run.

Once: Runs the report one time.

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

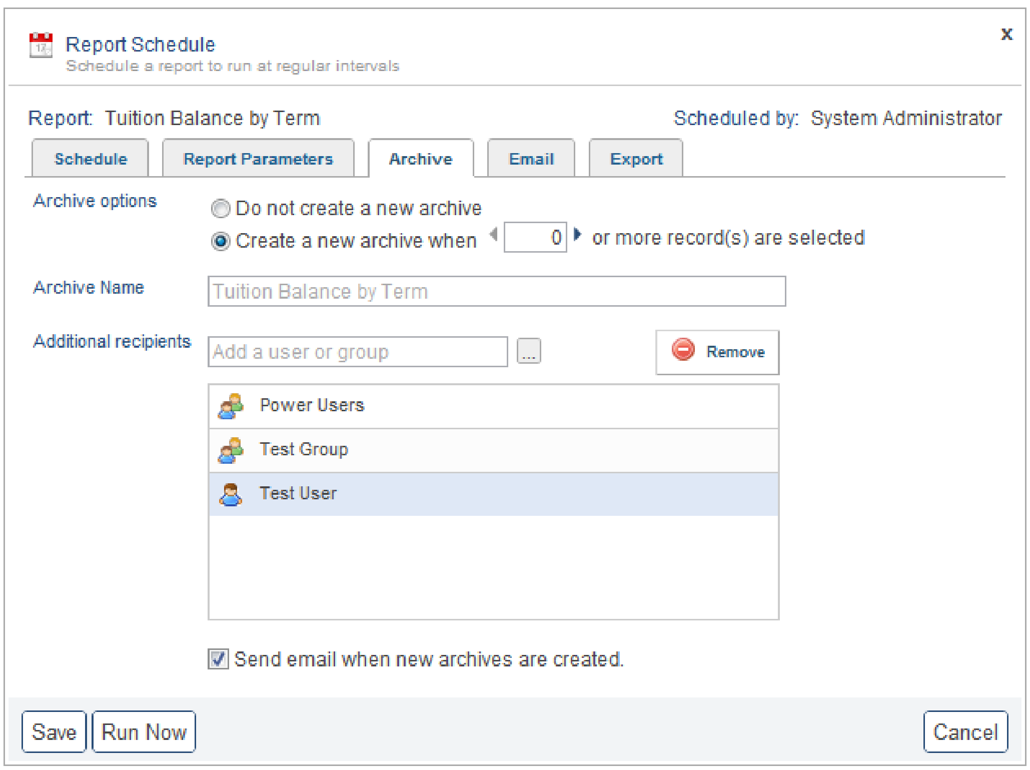
If the report prompts for filter criteria or a mapping suite table, you will also need to provide the report parameters for the scheduler to use.

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.



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.

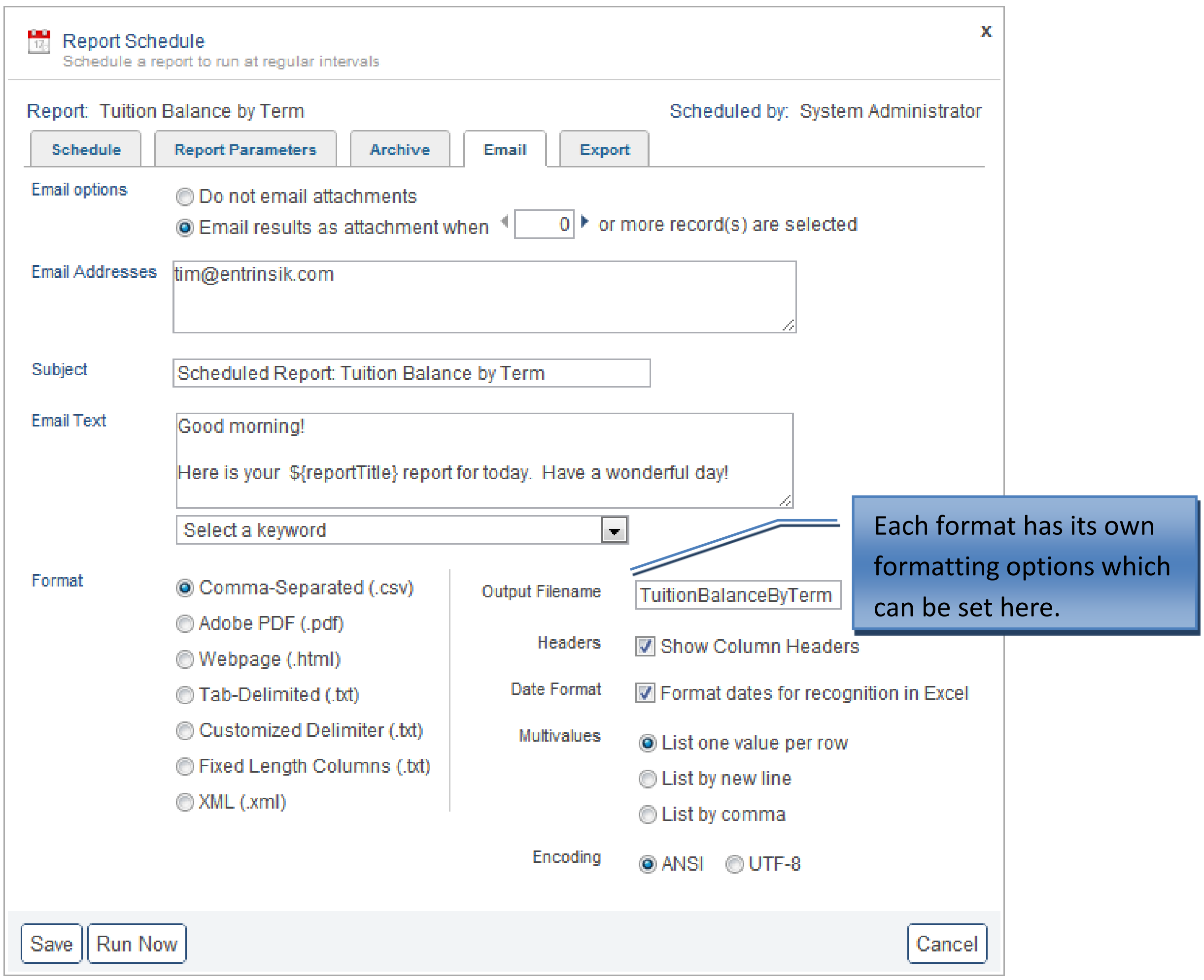
Archive Name: The archive name defaults to the name of the report; however, you can optionally change the name of the archive.

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.



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.

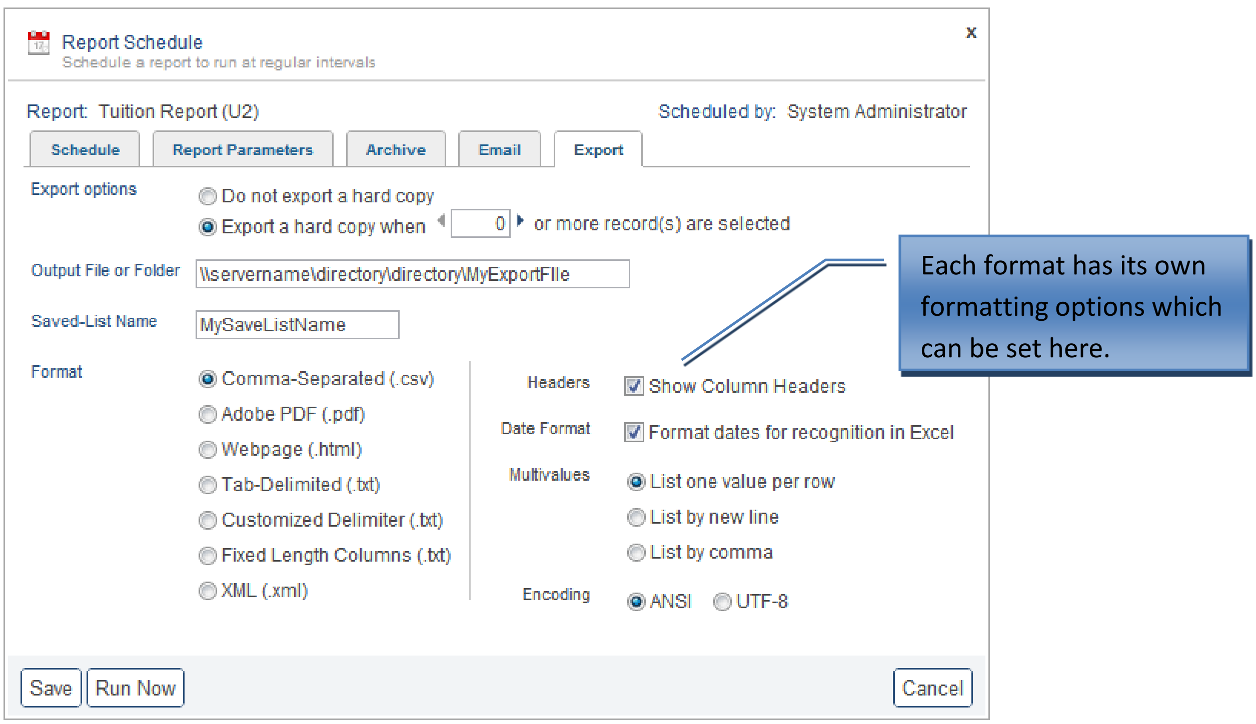
Subject: Enter the text that will appear in the subject line of the email.

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.



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.

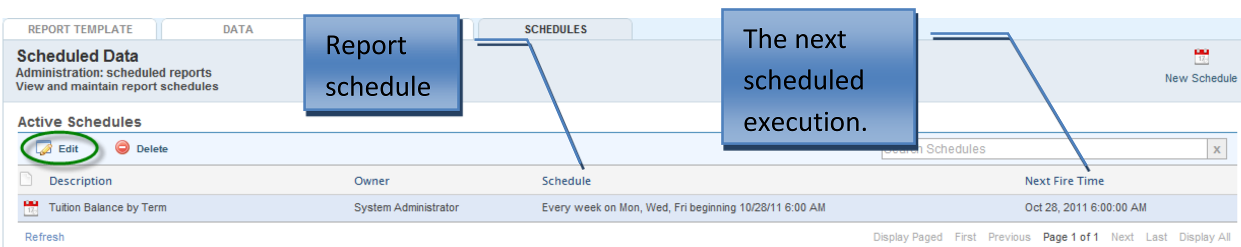
Format: Choose the format for the export file. Additional formatting options for the export file are available to the right of the format list.

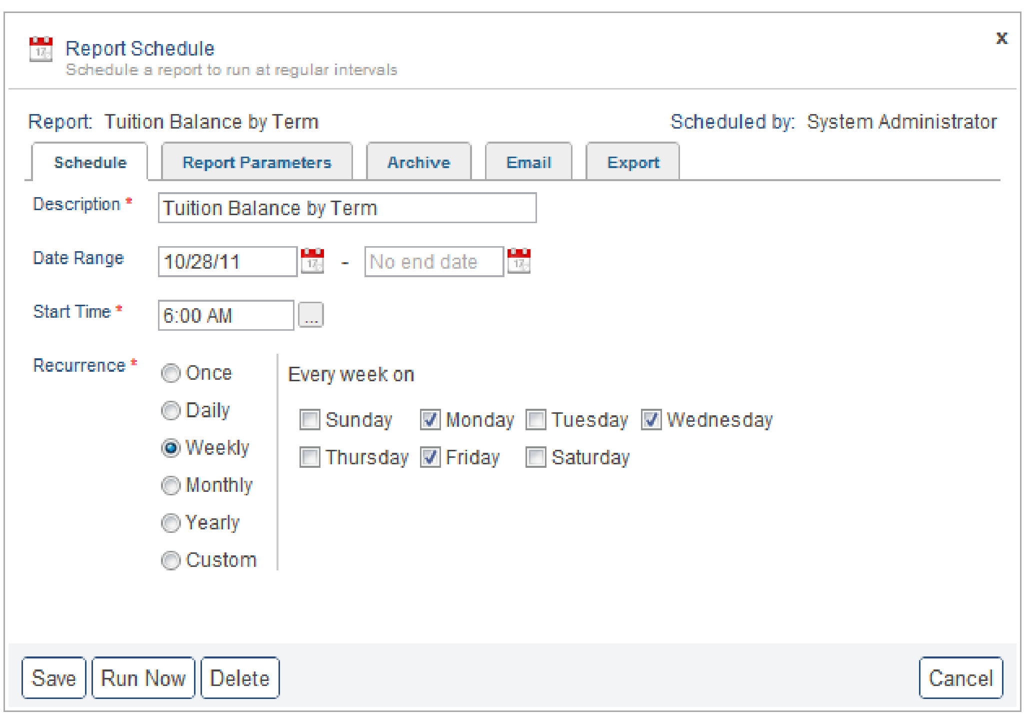
Finalizing the Schedule

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.

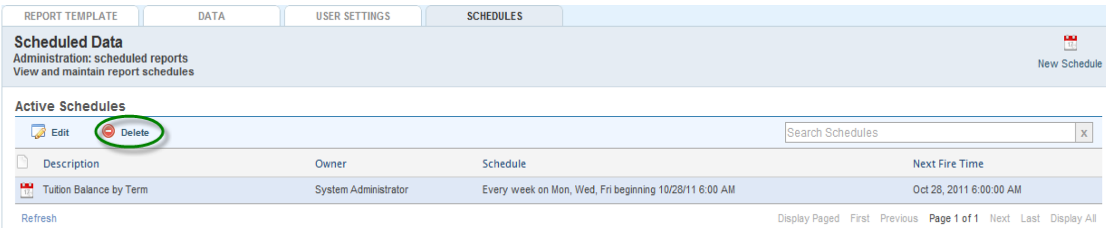




Clicking the Run Now button will execute the schedule immediately while maintaining the Next Fire Time.

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.



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

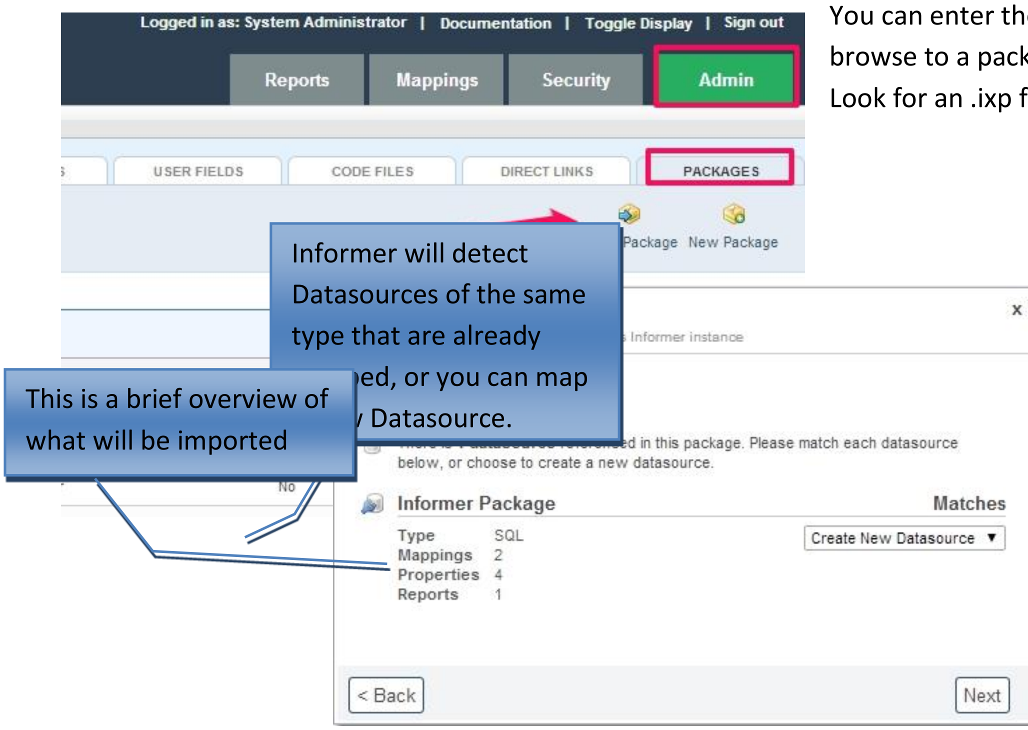
In this chapter, we will:

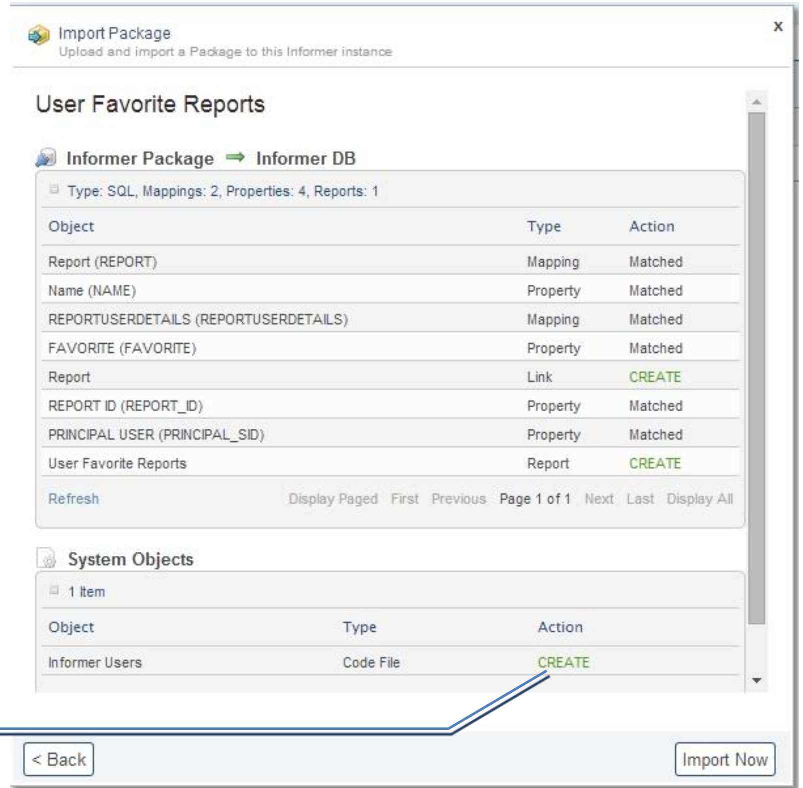
- Import a package
- Create a package of multiple items
- Create a package of a single report

Importing a Package

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

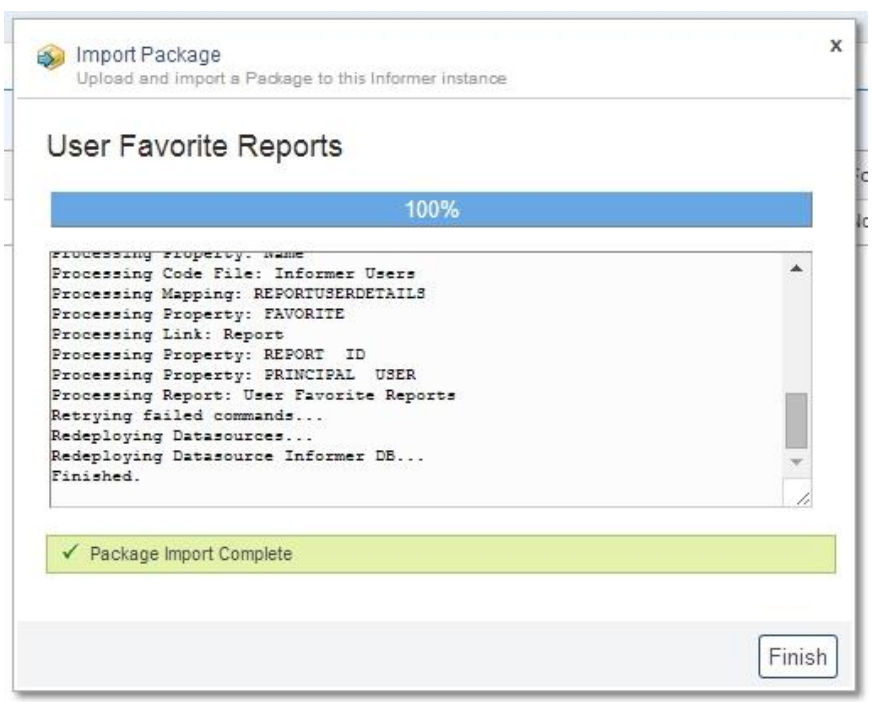
You can enter the URL of a package or browse to a package on your computer. Look for an .ixp file type.





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.

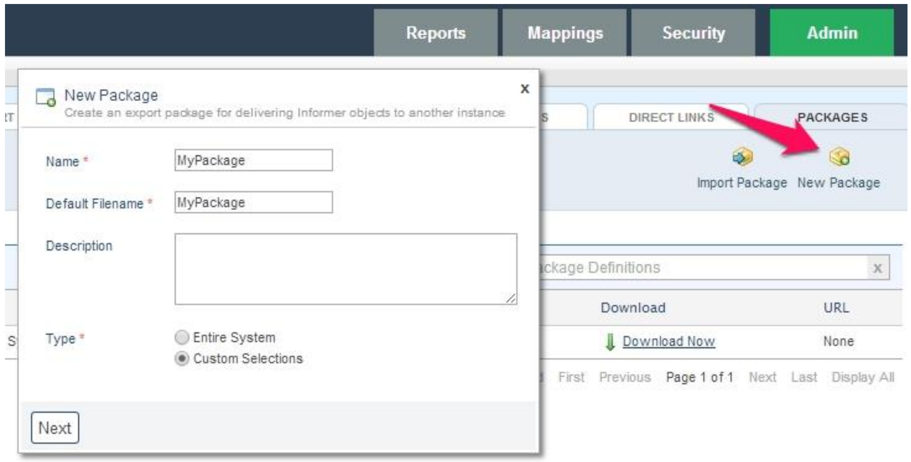
You can see whether this object already exists or will be created.



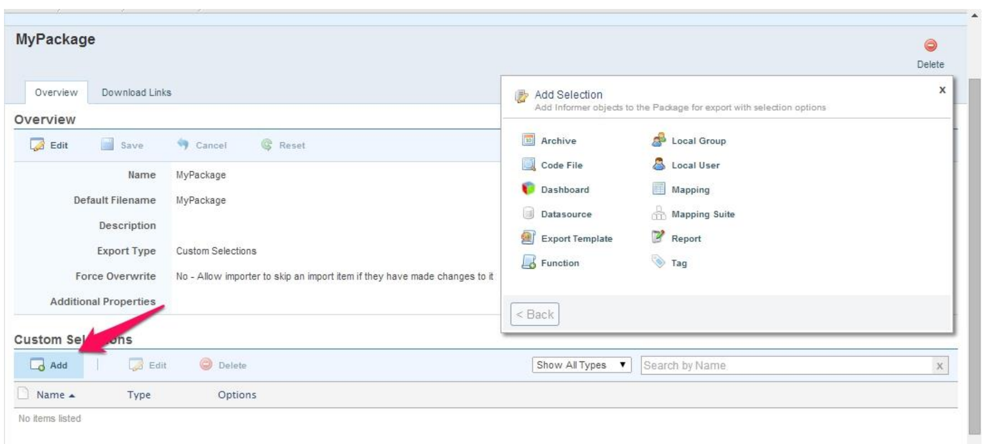
This window will tell you the status of the package import. Particularly large packages can sometimes take a long time to import. Please be patient.

Creating a Package of Multiple Items

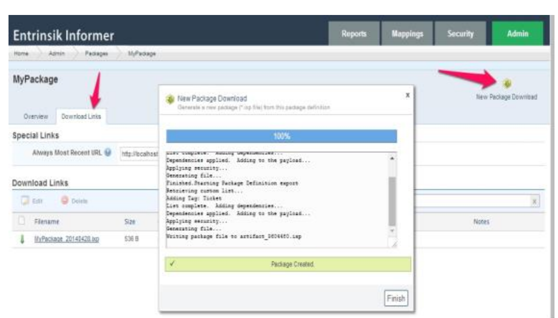
Creating a package is simple. Under the tabs Admin > Packages is a listing of all the previously created packages. There is also New Package Button (right next to Import Package).



If you choose to package the Entire System, the next step is to create a download link. To package a Custom Selection, you have to specify what to include in the package.



You can add multiple selections to a single package, such as several archives and a dashboard. If you package a Report or Mapping, all of its dependencies will automatically be added to the package as well. Choosing Datasource or Mapping will also allow you to package All Reports or All Public Reports built off of that Mapping or Datasource.



Now that your package has been defined, you need to create and download it. Click Download Links, then click New Package Download. For large packages, this process may take a long time to run.

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.