

# Informer Advanced Training Guide

Informer Link: <http://informer.socc.edu:82/informer/>

## Online Training Links

You tube links: <http://www.youtube.com/entrinsikinc#play/all>

- Report Dashboard: [http://www.youtube.com/entrinsikinc#play/all/favorites-all/2/FteA7\\_SODCs](http://www.youtube.com/entrinsikinc#play/all/favorites-all/2/FteA7_SODCs) 8:06 minutes
- Archives: <http://www.youtube.com/entrinsikinc#play/favorites/3/TJ8RKi7vY1Q> 5:25 minutes
- Analytics: <http://www.youtube.com/entrinsikinc#play/all/favorites-all/0/s35MDO3wWEU> 6:32 minutes
- Scheduled Reports: [http://www.youtube.com/entrinsikinc#play/all/favorites-all/2/FteA7\\_SODCs](http://www.youtube.com/entrinsikinc#play/all/favorites-all/2/FteA7_SODCs) 9:08 minutes

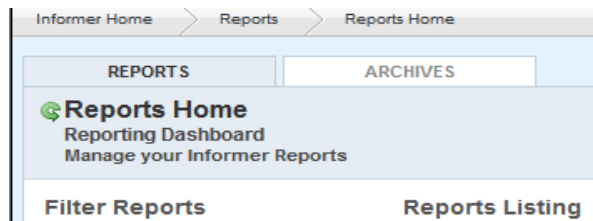
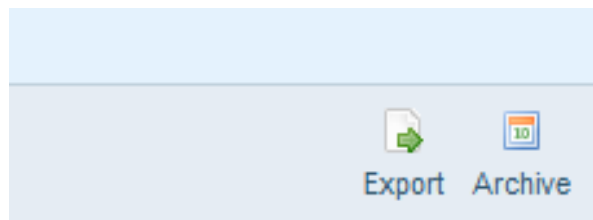
## Report Exporting and Archiving

Export and archive options appear at the top of the report on the far right-hand side after executing the report. Reports with several columns may require using the scroll bar.

Export options include excel/csv, Adobe PDF, text, XML, Webpage, and delimited. Live excel creates a link in the file or as a shortcut on the desktop to launch a report without accessing informer via the web link (template tab).

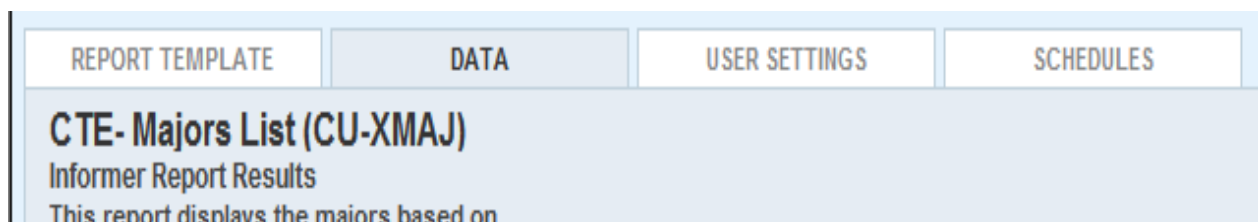
**Note:** Use the \* to indicate a blank parameter when using the live excel feature. Create a desktop shortcut – save time.

Archive option saves the data within Informer on the *archive* tab located on the main report dashboard. All exporting, analytics and charting options may be executed.

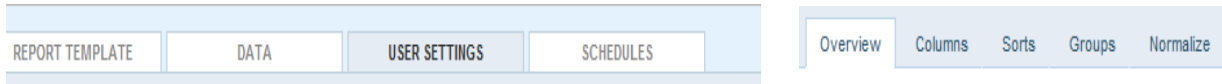


## Report Features

- Report features allow views of the data selection/parameter fields, the data column fields, sort and grouping associated with the report and the report sharing information within *the report template* tab. Live excel feature is located on the far right-hand side of the screen. Live excel creates an excel file automatically linked to informer – no login required and allows instant data refresh from excel.
- The *data* tab is the location to enter the selection criteria/parameters and run the report.
- Within the *user settings* tag the report view can be customized to user desired specifications including removing columns, custom sorts and groupings, and adding new fields.
- The *schedules* tab provides the ability to schedule reports to run in the future and to provide the data via email, as an archive, or download to a computer.



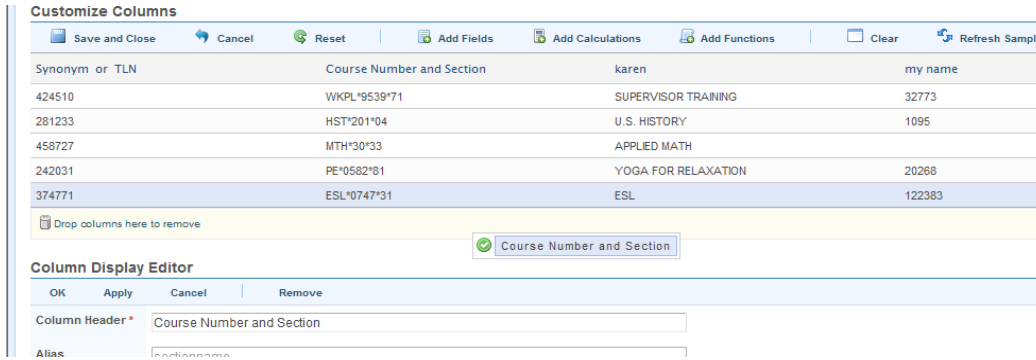
## Report User Settings



**Overview tab** – displays the report template information

**Columns tab** – user controls the order of the columns displayed in the report as well as the fields displayed.

**Move columns** by clicking on the heading and dragging to the new location in the report header line. **Remove a**



**column** by clicking on the heading and dragging to the bottom of the data display until the green check mark appears and then release.

**Add a new field** using the add fields option – contact IT for appropriate fields to use in reports.

**Change the name** of the column heading to a user specified name by clicking on the column heading and changing the column header field located below the columns.

**Sorts tab** – user controls the sort order for the report

**Groups tab** – user controls the group order for the report

**Normalize tab** – sets the multi-value options for exports

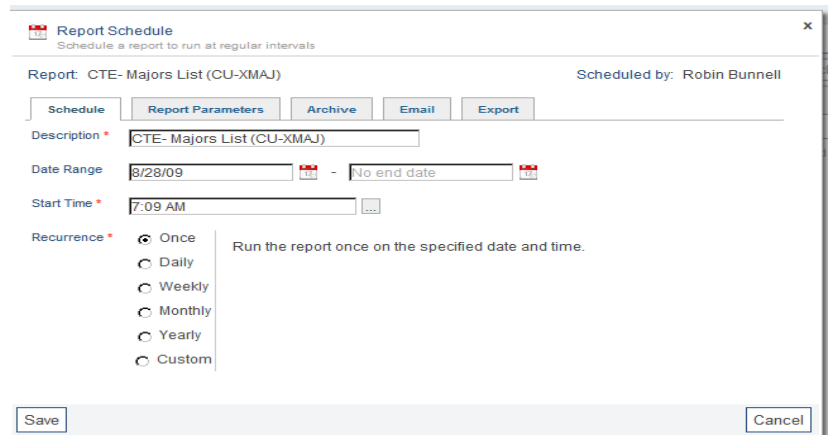
**Clear Settings** – located on the far right-hand side; restores to the default report in the system

## Report Schedules

Options to archive, email and export the report data are located within the corresponding tab and include options used in regular report options.

Enter information for **all tabs** then save the “scheduled” report.

If Colleague is down the report will not be executed – be sure to check on reports that are scheduled.



## Report Analytics and Charting

After a report has been executed the options to perform analytics and charting are available on the corresponding tabs located on the far left-hand side of the report data.

Analytics provides instant access to totals, averages, and pivot table type data displays.

Charting provides chart views with options to download the image to import into other software.

