



**ENTRINSICON**  
***LEVEL UP!***

September 26<sup>th</sup>-29<sup>th</sup>, 2023  
Raleigh, NC

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# Migrating to Informer 5

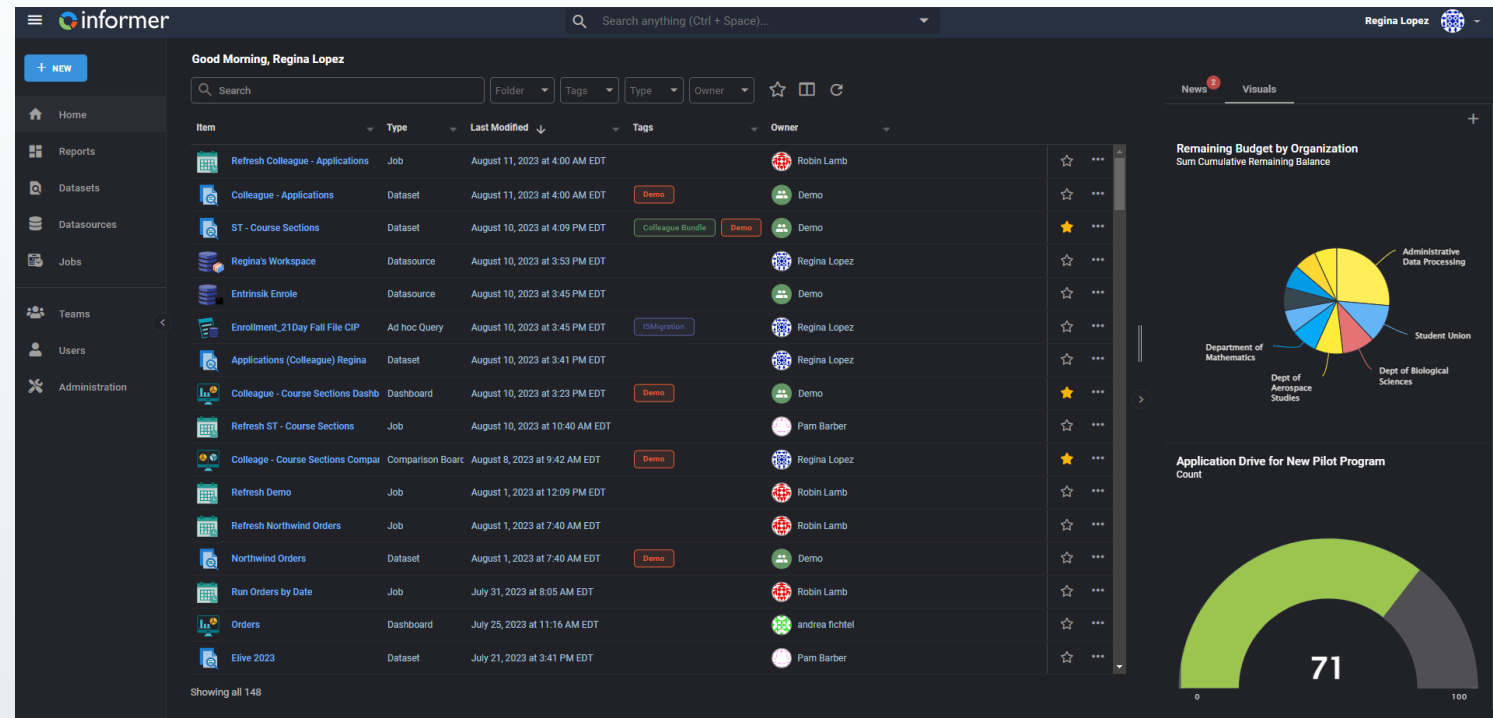
Regina Lopez

Director of Informer Customer Success

Entrinsic

# Why Informer 5?

- Provide single source of truth with Datasets
- Cleanse and prepare data with Data Flows
- Govern data with Team & Role-based security
- Explore and analyze data with Filtering
- Create and interact with visuals
- Personalize user content
- Collaborate with Team members
- Publish content online or embedded



# Agenda

- 1 Differences between I4 and I5
- 2 Datasets vs Ad hoc Queries
- 3 Migration Strategies
- 4 Best Practices
- 5 Migration Steps

# Differences between I4 and I5

This screenshot shows the 'Reports Home' interface. At the top, it says 'Logged in as: System Administrator' with links for 'Documentation', 'Contact Support', 'Toggle Display', and 'Sign out'. The main navigation includes 'Reports', 'Mappings', 'Security', and 'Admin'. The 'Reports Home' section includes a 'Reporting Dashboard' and 'Manage your Reports' options, with 'New Report' and 'Import Package' buttons. A 'Filter Reports' sidebar on the left shows categories like 'My Favorites', 'My Reports', 'Recently Added', 'Datasources', and 'Tags'. The main 'Reports Listing' table has columns for 'Report Title', 'Options', 'Favorite', 'Created by', and 'Last Executed'. One report, 'Enrollment\_21Day Fall File CIP', is listed with 'Launch' and 'Details' buttons.

This screenshot shows the main dashboard for Regina Lopez. The top navigation bar includes a search bar and user profile. The left sidebar lists navigation options: Home, Reports, Datasets, Datasources, Jobs, Teams, Users, and Administration. The main content area features a 'Good Morning, Regina Lopez' greeting and a table of items. The table columns are 'Item', 'Type', 'Last Modified', 'Tags', and 'Owner'. The right sidebar contains two charts: 'Remaining Budget by Organization' (a pie chart) and 'Application Drive for New Pilot Program Count' (a gauge chart showing 71 out of 100).

Item	Type	Last Modified	Tags	Owner
Refresh Colleague - Applications	Job	August 11, 2023 at 4:00 AM EDT		Robin Lamb
Colleague - Applications	Dataset	August 11, 2023 at 4:00 AM EDT	Demo	Demo
ST - Course Sections	Dataset	August 10, 2023 at 4:09 PM EDT	Colleague Bundle, Demo	Demo
Regina's Workspace	Datasource	August 10, 2023 at 3:53 PM EDT		Regina Lopez
Entrinsik Enrole	Datasource	August 10, 2023 at 3:45 PM EDT		Demo
Enrollment_21Day Fall File CIP	Ad hoc Query	August 10, 2023 at 3:45 PM EDT	ISMigration	Regina Lopez
Applications (Colleague) Regina	Dataset	August 10, 2023 at 3:41 PM EDT		Regina Lopez
Colleague - Course Sections Dashb	Dashboard	August 10, 2023 at 3:23 PM EDT	Demo	Demo
Refresh ST - Course Sections	Job	August 10, 2023 at 10:40 AM EDT		Pam Barber
Colleague - Course Sections Compar	Comparison Boarc	August 8, 2023 at 9:42 AM EDT	Demo	Regina Lopez
Refresh Demo	Job	August 1, 2023 at 12:09 PM EDT		Robin Lamb
Refresh Northwind Orders	Job	August 1, 2023 at 7:40 AM EDT		Robin Lamb
Northwind Orders	Dataset	August 1, 2023 at 7:40 AM EDT	Demo	Demo
Run Orders by Dale	Job	July 31, 2023 at 8:05 AM EDT		Robin Lamb
Orders	Dashboard	July 25, 2023 at 11:16 AM EDT		andrea fichtel
Elive 2023	Dataset	July 21, 2023 at 3:41 PM EDT		Pam Barber

	Informer 5	Informer 4
Datasources	U2, SQL, Web, JDBC and anything else that can produce a JSON stream of data.	U2 or JDBC compliant database connections.
Datasets	Optimized for large number of records, indexed for fast processing, refreshed on a schedule, and shared to Teams. Helps with data governance and reduces load on production database.	Not available.
Workspaces	Datasources created by uploading one more CSV files.	Not available.
Interacting with Data	Use filters to interact with indexed data.	Queries with run-time parameters.
Flow Steps	Manipulate query results after a query has been run by adding new fields/calculations or modifying existing ones.	Limited options, can not control order.
Visuals	More visual types available that can be shared outside of Informer.	Limited number of visuals.
Discover	Informer automatically suggests visuals based on the field(s) selected.	Not available.
Dashboards	They dynamic and data can live outside of Informer. Visuals show data from most recent refresh of Dataset. Can be shared outside of Informer.	They are dynamic but query has to be run first.
Jobs (Scheduler)	Schedule Dataset refreshes, email, burst email, push data to other systems via SFTP or direct-write. Allows for multiple actions and multiple Queries per job.	Only reports and data providers can be scheduled. Limited actions.
Security	Follows Teams and Users security model. Access is based on Role(s) and row level and field security is available.	Time consuming.

# Datasets vs Ad hoc Queries



# Changes from Informer 4

One of the major changes, and benefits, from Informer 5 is its shift from Ad hoc reporting to Dataset driven analysis. Datasets allow users to:

- Curate an exact list of records, instead of using query parameters
- Have complete control over what is seen, including custom calculations
- Marry data from different databases, spreadsheets and other Datasets
- Promote data governance
- Build multiple reports from one Dataset
- Provide consistent data across the organization
- Ad hoc Queries are used when real-time data is needed





# Definitions

## Datasets

Pre-populated Queries that have been updated on demand or via a job. Data is ready for users to start interacting with the results. Datasets are the building blocks of other types of reports – Dashboards, Comparison Boards and Data Views.

Queries have

- Fields
- Criteria
- Flow Steps

## Ad hoc Queries

Real-time queries that run against the database each time it is executed. The query must be run to populate the data in order to interact with the results. These results are temporary.



# Side by side comparison

Datasets	Ad hoc Queries
Bring back as much data as needed	Real-time results
Data persists	Results are temporary
No need to hit database every time	Results are only available after query is run
Refresh data on demand or via a Job	Hits database each time query is run
Visuals can be saved	Visuals cannot be saved
Post query filters available to pare down data	Post query filters available to pare down data
Share filtered Datasets	Entire query is shared
Datasets are backend to Visuals and Dashboards	Ad hoc Queries cannot be used to build content
Single source of truth	Results vary with each run

# Migration Strategies



# Migration Strategies

There are many ways to approach the migration. Here are a few:

- Mimic Informer 4
- Leverage Datasets
- Start Fresh



# Mimic Informer 4

- Use I5 just like you do I4
- Migrate Datasources, Mappings, Links and Reports
- Migrated reports will be Ad hoc Queries in Informer 5
- Consolidate reports by selecting more data
- Apply post-query filters to pare down data
- You do not need to multiple copies of a report

# Leverage Datasets

- Combine I4 and I5 functionality
- Migrate Datasources, Mappings, Links and Reports
- Optimize reports migrated and convert to Datasets
- Use Datasets to build reports, like Dashboards
- Use post-query filters

# Start Fresh

- Migrate Datasources, Mappings and Links only
- Create all Queries from scratch (either as Ad hoc or Datasets)
- Leverage post-query filters
- Leverage Datasets to create less queries
- Use existing I4 report as a guide to create I5 query
- Good practice to learn I5

# Best Practices





# Best Practices

- Run each version of Informer on separate server
- Upgrade I4 to current version
- Clean up I4 and run audit reports before migrating
- If migrating reports:
  - Do not convert everything from I4
  - Create inventory of reports to convert
  - Add migration tag to use when building package
  - Meet with users to discuss and prioritize
  - Use Data Gathering Workbook to track reports to migrate
  - Choose a few reports to start – you can add more later
- Review security and define Teams and Roles
- Validate reports after migration



# Migration Steps



# Migration Steps

- Install Informer 5 (we help you!)
- Additional Setup for Unidata Databases
- Setup Security – User and Teams
- If migrating reports:
  - Create package from I4 and download
    - Datasource/Mappings/Links
    - Package reports with Migration tag
    - Import package and validate results
    - Recreate Live Excels (they do not migrate)
    - Recreate I4 Dashboards (they do not migrate)
    - Recreate I4 Schedules as I5 Jobs (they do not migrate)
- Design and build new Datasets
- Design and build new Reports
- Share Datasource and Queries to Users/Teams
- Train end users and develop documentation

# Training and Consulting



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Customized Training



Online Training Series - Entrinsic University



Onsite Training



Managed Services



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Q & A



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Thank You