



Administration and System Setup

Informer 5 Training

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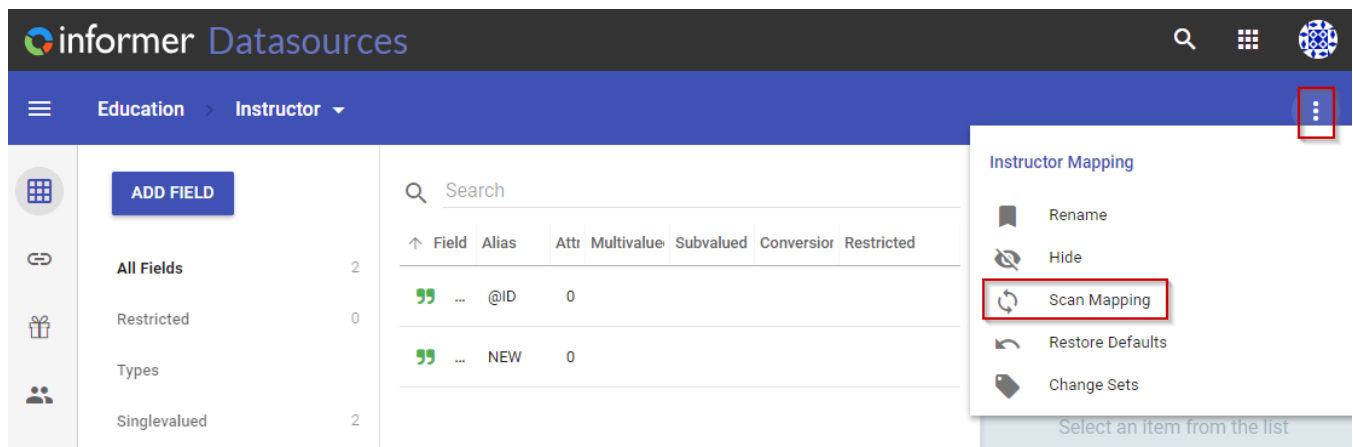
Datasources

Anything that can stream data, structured or unstructured, into Informer is a potential Informer Datasource. In the traditional sense, a Datasource means explicitly a physical Database supporting a known query grammar such as SQL, TCL/ECL, or other such standard. In Informer 5 however, a Datasource does not have to comply with that rigid definition. Any 'source' - be it a traditional physical database, a REST API endpoint, a spreadsheet, a proprietary data feed - can serve as a Datasource. Datasources are typically owned by an IT Team or an Admin Team. Certain actions on the Datasource are restricted by a User's Role within a team. There are four types of Datasources available in Informer by default: Workspaces, SQL Datasources, U2 Datasources, and Web Datasources.

Scanning a Datasource

For Informer 5 to recognize all the metadata in your database, it must first perform a scan on that Datasource. Once the Datasource scans, Informer 5 creates Mappings inside the application that match up with the various files, tables, and fields from your database. If there is a need to update a Mapping, such as adding Fields, navigate to the Mapping and click on the three vertical dots in the top-right corner to open the Actions menu. Select 'Scan Mapping' to re-scan the Mapping.

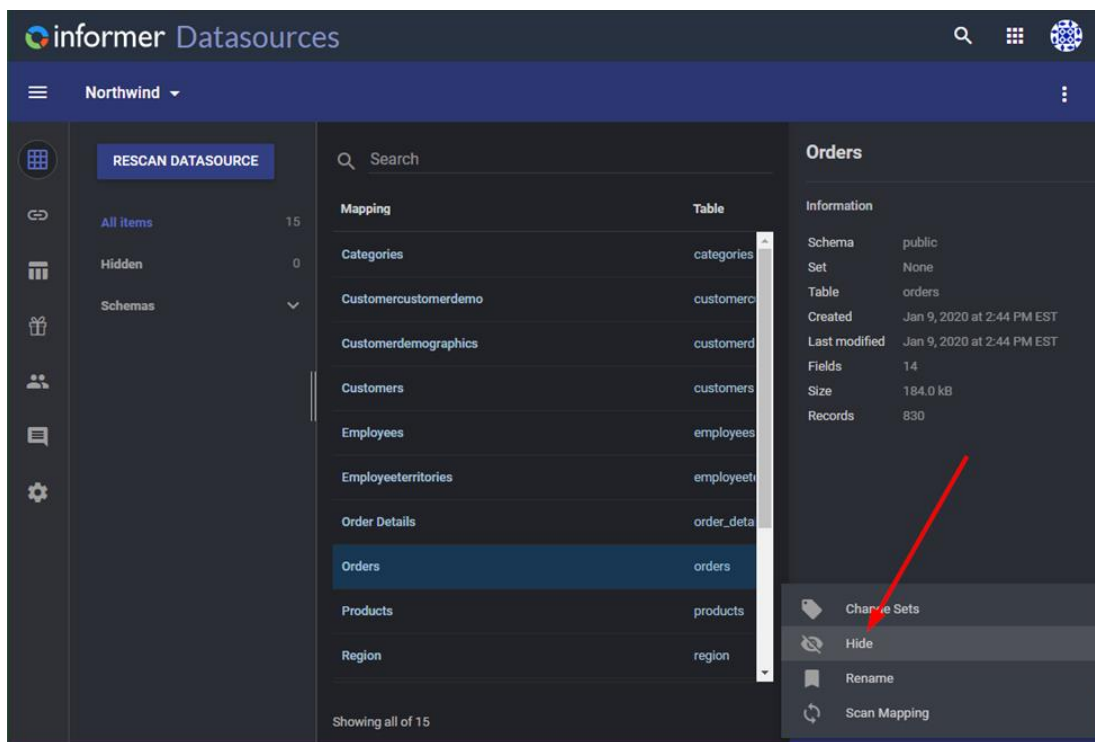
Note: Web Datasources do not have Mappings or Fields, and do not



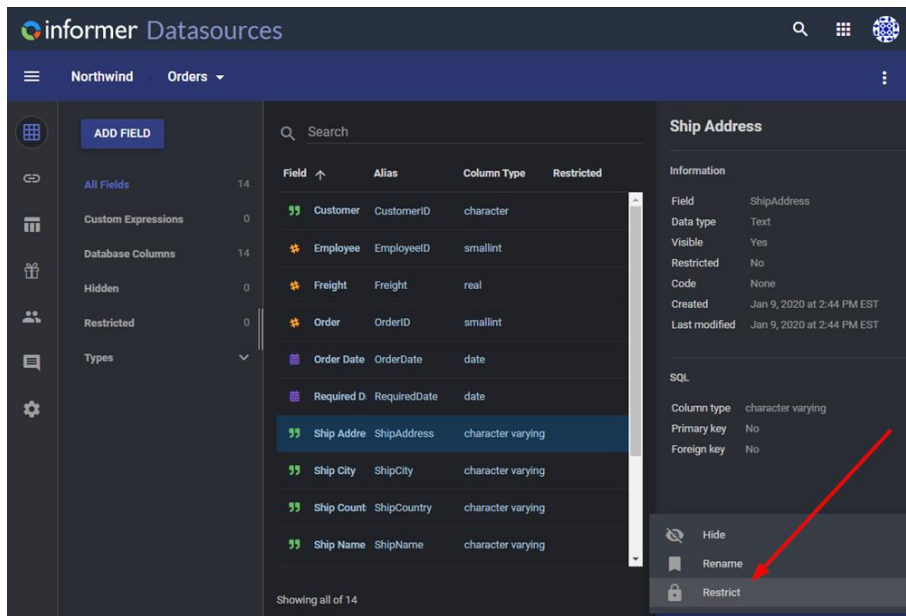
The screenshot shows the Informer Datasources interface. The top navigation bar includes the Informer logo, the text 'Datasources', and search and grid icons. Below the navigation bar, the breadcrumb 'Education > Instructor' is visible. A sidebar on the left contains icons for a grid, a link, a gift, and a person, along with a list of field types: 'All Fields' (2), 'Restricted' (0), 'Types', and 'Singlevalued' (2). The main content area features a search bar and a table with columns: 'Field', 'Alias', 'Attr', 'Multivalued', 'Subvalued', 'Conversion', and 'Restricted'. The table contains two rows of data. A context menu is open in the top-right corner, titled 'Instructor Mapping', with options: 'Rename', 'Hide', 'Scan Mapping' (highlighted with a red box), 'Restore Defaults', and 'Change Sets'. A footer bar at the bottom of the menu says 'Select an item from the list'.

Hide/Un-hide Mappings and Fields

Mappings and Fields within a Datasource can be hidden. Hiding a Mapping or Field effectively removes access to it from within Informer 5. These Mappings or Fields will not appear as a choice when building a Dataset or Ad-hoc Query until they have been unhidden by someone who can edit the Datasource. To hide a Mapping or Field, select it then choose Hide from the Actions menu. To hide multiple Mappings or Fields at the same time, highlight them all and then choose Hide from the Action list.



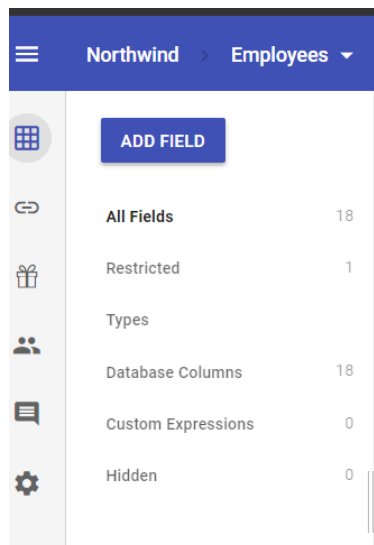
Fields can also be restricted. When sharing the Datasource to another Team, the Limited Access option will prevent the other Team from adding restricted Fields to Datasets or Ad-hoc Queries. You can restrict a Field by selecting it, then choosing Restrict from the Actions menu or by clicking into the Field and checking the Restricted checkbox.



NOTE: Users can see restricted Fields that they do not have access to; but they cannot add them to a Dataset or Ad hoc Query. If a restricted Field is added to a Dataset and that Dataset is shared to a Team or individual User, those Users can view the Field.

Custom Expressions

Informer 5 allows Users to add Custom Fields to their mappings. Users can reference SQL functions that are in their SQL database or create U2 columns such as a Trans statement to pull fields from one Mapping into another.



SQL Custom Field

The screenshot shows the 'Custom Field Expression' configuration window. It includes fields for 'Name' (FullName) and 'Alias' (fullName). The 'Returns Type' is set to 'text' and the 'Data type' is 'Text'. The 'Expression' field contains the SQL query: `1 CONCAT('FirstName', 'LastName')`. There are 'CANCEL' and 'SAVE' buttons at the bottom right.

U2 Custom Field

The screenshot shows the 'Custom Field Expression' configuration window. It includes fields for 'Name' (LastName) and 'Alias' (lastName). The 'Data type' is 'Text' and the 'Conversion Code' is empty. There are checkboxes for 'Multivalued' and 'Subvalued', both of which are unchecked. The 'Expression' field contains the U2 query: `1 TRAVIS('PERSON', @ID, 'FIRST_NAME', 'X')`. There are 'CANCEL' and 'SAVE' buttons at the bottom right.

Links

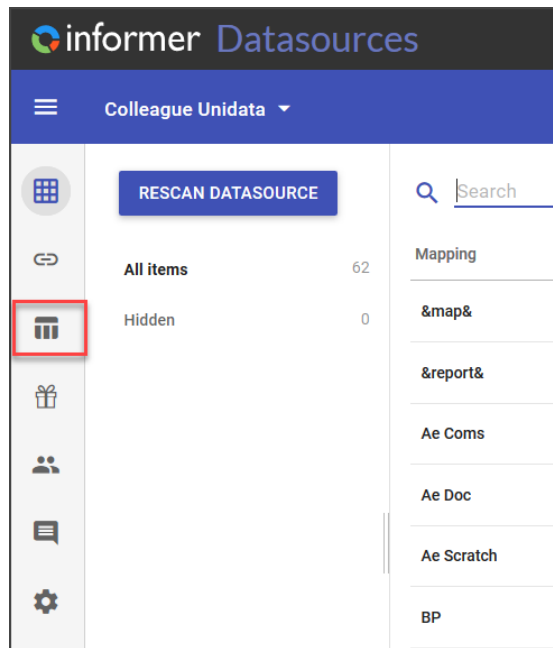
Linking Mappings together allows you to find similarities between two different Mappings and create a display that draws the two tables from the two Mappings together into one large table of Fields. There are different types of links depending on the database.

Depending on the database type, different types of links will be available. Types of link include:

- Field Pairings
- Third Normal Joins
- Scalar Joins
- Left, Right and Inner Join
- Remote Datasource
- SQL
- U2

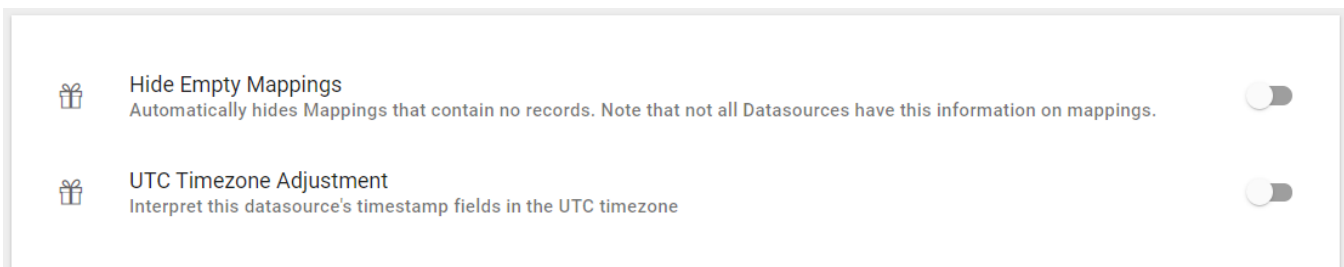
Mapping Suites

A Mapping Suite is a set of related Mappings segregated by a common attribute. For example, general ledger summary Mappings and detail Mappings may be split into multiple Mappings for each fiscal year. There are typically template Mappings that define the columns for each of the year-specific Mapping. Queries execute against the template Mapping, using the selected or default year at run-time. This eliminates the need to have Mappings for each individual year.



Features

To hide Mappings that contain no records, toggle the “Hide Empty Mappings” option under Features for the Datasource (this does not work for every type of database). You can also update the UTC Timezone Adjustment feature. When toggling this feature on, this feature will treat all Datasource timestamp fields as UTC. That in combination with setting the Time zone on your local profile. This feature is used for Datasources connected to databases that store their timestamp fields in UTC.

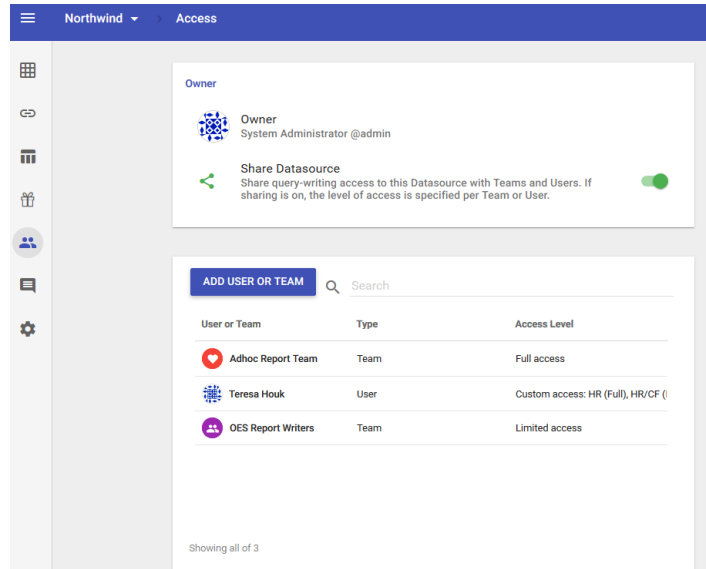


Sharing

For users to be able to build Datasets or Ad-Hoc queries the Datasource needs to be shared with a User or Team. When sharing a Datasource, the following options are available:

- **Full Access:** Users can add any Mappings and Fields to Queries and can write Native SQL Queries.
- **Limited Access:** Users can add any Mappings and unrestricted Fields to Queries but cannot write Native SQL Queries.

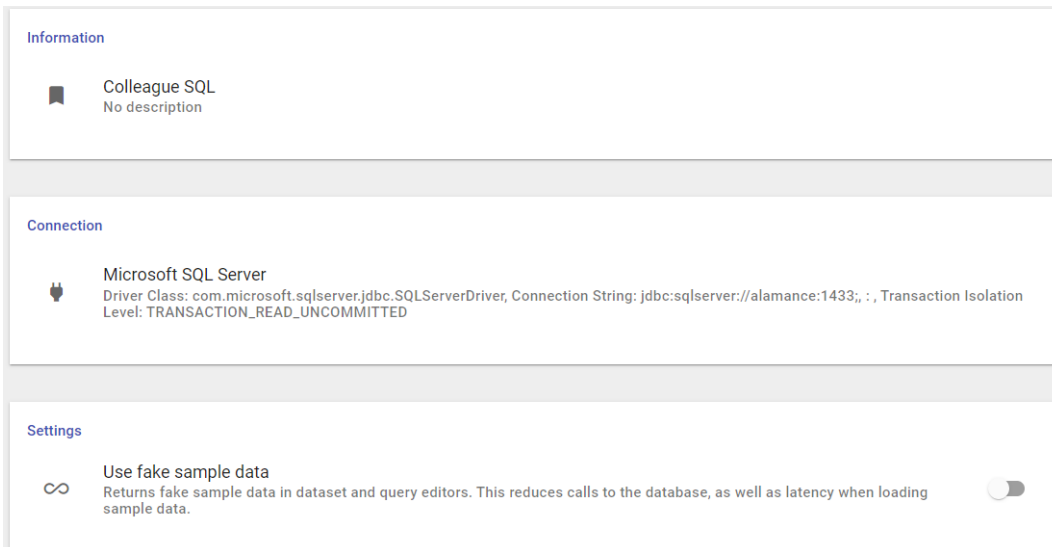
- **Custom Access:** Choose to grant Full Access or Limited Access to specific Mapping Sets.



Access to Datasources is covered in the Understanding Security class.

Settings

To use fake sample data in Query results, toggle on the “Use fake sample data” option under Settings. This reduces calls to the database when loading sample data.



Administration

The Administration area allows Informer administrators to manage system-level settings, features, access logs, and other useful information about the Informer instance. The Administration page is available from the main Informer landing page or through the navigation menu. Only Super Users and the local Informer user with username 'admin' have access to Administration.

Settings

The Settings area includes configurable options for Users, Logs, Email and Jobs.

Users

The **Users** section allows for the following configurable defaults and requirements:

- **Default Team** - Sets a Team where newly created Users are automatically added. Setting up a default team will allow new users login capabilities, but access depends on permissions and assigned roles.
- **Default Domain** - Auto-selects the chosen domain when users load the login screen.
- **Password Strength Requirement** - Sets the minimum strength required for local user passwords. Available options are Weak, Fair, Moderate, and Strong. This does not apply to domain users.
- **Help URL/Email Address** - Changes the URL and email address used for help services.

Security

The Security section enables and disables system security:

- **Always inherit Dataset Field security from Datasource** - use Datasource security for Datasets that have Fields associated with a Datasource.
- **Sanitize HTML in Grid** - protect against cross-site scripting attacks by removing certain HTML elements from the data grid.

Logs

The Logs section enables and disables system level logging events.

Email

Configure the smtp connection so that Informer may send emails, such as through a Job.

Jobs

Configure system wide Job settings.

Queries

Configure system wide Queries settings.

License

The Informer 5 License page provides information about the system's licensed features and provides a location to update the license when up for renewal or to enable newly acquired features.

Updating a License

To update the license, click the "Update License" button in the top-right corner. Choose from the following options:

- **Check license server** - The Informer server establishes a connection with the Entrinsik licensing server to automatically pull-down updated license information (*Requires active internet connection*)
- **Upload license file** - Option to provide a .lic file containing license information.
- **Enter license key manually** - Option to provide a token string containing license information.

Features

The Informer 5 Features page provides toggles to enable various special features within the UI. System Features are global settings. Once enabled, they become immediately available for use. Choose from the following options?

- **Experimental Elastic Script Field Support** - Enables and unhides an Elasticsearch scripting feature on the Dataset Query page
- **Google Maps** - Enables the creation of [Google Map Visuals](#). This feature requires a [Google Maps API Key](#).
- **Northwind Database** - Installs a training database with sales data to assist in learning how to use Informer 5.

Sessions

The Informer 5 Sessions page supplies information about active login sessions. The Sessions page has information about the user's; device, browser, logged in, and last active time. Options to filter and terminate sessions are also available.

API Tokens

The API Tokens page contains information about each Token including the user who created it, type of Token, resources it allows access to or modification of, access level, usage amount, and a button to copy the Token to the clipboard.

Domains

Domains supply a mechanism by which user logins are authenticated against a central repository. Domains can also be used to populate your Informer with users and Teams. Informer supports standard LDAP repositories, as well as Microsoft Active Directory and SAML. SAML-based Domains can be used to automatically authenticate and log users into Informer.

Log

View or export system Logs. The Log page contains a list of recent API calls made on the system.

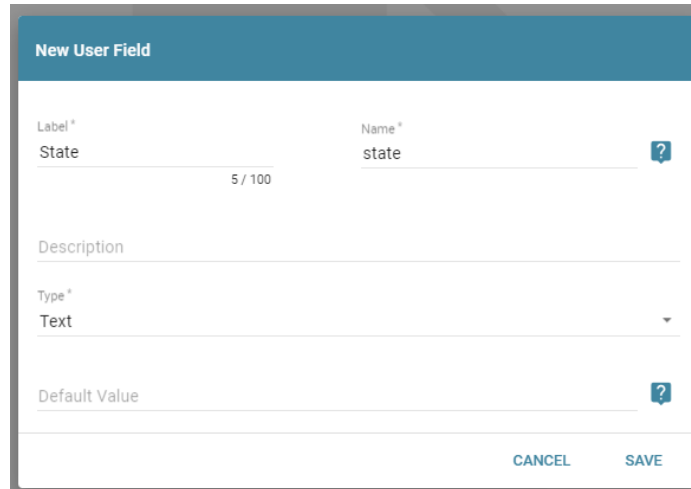
Global Colors

Global colors allow for custom color assignment to a specific value. This will apply to all Visuals from each Dataset, allowing for consistent representation of key values.



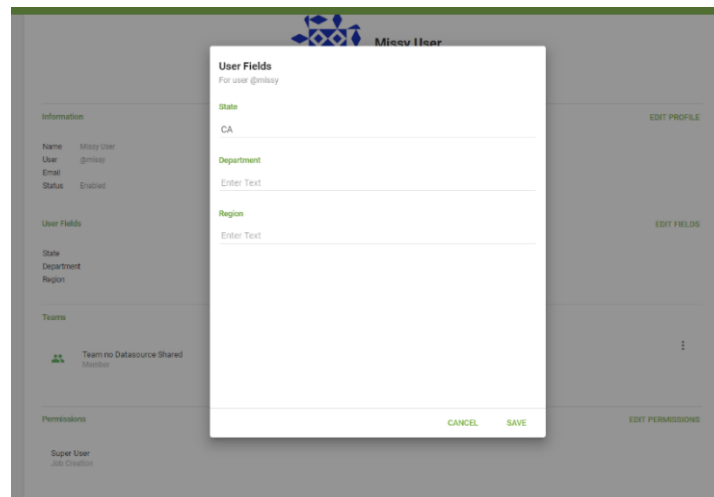
User Fields

To apply row-level security, create User Fields and assign them to individual Informer users. Use these User Fields in Query criteria and/or in Filters.



The screenshot shows the 'New User Field' form. It has a blue header with the title 'New User Field'. The form contains several input fields: 'Label*' with the value 'State' and a character count '5 / 100'; 'Name*' with the value 'state' and a help icon; 'Description' (empty); 'Type*' with a dropdown menu set to 'Text'; and 'Default Value' (empty) with a help icon. At the bottom right, there are 'CANCEL' and 'SAVE' buttons.

Once the User Field is created, assign it to a User under the User Profile>Edit Fields. This User Field can now be used Query criteria and/or Filters.



The screenshot shows a user profile page for 'Missy User' with a modal window titled 'User Fields' for user '@emilcy'. The modal has three sections: 'State' with the value 'CA', 'Department' with the placeholder 'Enter Text', and 'Region' with the placeholder 'Enter Text'. At the bottom of the modal are 'CANCEL' and 'SAVE' buttons. The background shows the user's profile information, including name, email, status, and various tabs like 'User Fields', 'State', 'Department', 'Region', 'Teams', and 'Permissions'.

Saved Functions

Saved Functions allow for reusable JavaScript code that can be referenced in Calculated Columns and Power Scripts.

New Function

Name *	Namespace *
Fiscal_Quarter	informer

Description 0 / 255

Parameters

Data Type	Variable name	Label
Date	date	date

[ADD PARAMETER](#)

Function body

```
function Fiscal_Quarter(date)
1  if (date == null)
2    date = new java.util.Date();
3
4  var month = date.getMonth() + 1;
5  var year = date.getYear() - 100;
6  var yearN = year + 1;
7
8
9  if(month == 1 )
10 {
11   return "FY"+year+" Q4";
12 }
13 else if(month >1 && month <=4)
14 {
15   return "FY"+yearN+" Q1";
16 }
17 else if(month >4 && month <=7)
18 {
19   return "FY"+yearN+" Q2";
20 }
```

[CANCEL](#) [SAVE](#)

Bundles

Bundles are packs of Informer content. Export them from one instance of Informer and then import them into another instance of Informer to copy the content.


System Health

When Informer Queries run, the results are indexed and stored within Elasticsearch as indices. Informer performs a routine cleanup of Elasticsearch with a default Job called Auto System Cleanup. By default, this Job is configured to run once every 24 hours at 11:59 PM server time. The firing time can be adjusted to correspond with planned maintenance windows.

Codes

Codes, sometimes referred to as validation tables, are code/description pairs associated with one or more properties. These code/description pairs are the only valid values for a specified property. The types of available Codes are Dataset Code, Datasource Code, Native SQL Code or User Entered Code. Creating Codes requires Super User access.

Dataset Code

Dataset Code 

Use two dataset fields for values and descriptions

Name *
Customer

Description


Select Dataset
Orders

Select value field
Customer

Select description field
Customer Company Name

CANCEL SAVE

Datasource Code

Datasource Code 

Use two Datasource Mapping fields for values and descriptions

Name *
Company

Description

Select Datasource *
Northwind

Select Mapping *
Customers

Customer

Company Name

CANCEL SAVE

User Entered Code

User Entered Code

Manually enter code values and descriptions

Name*

True - False

Description

Value*

0

Description*

False



Value*

1

Description*

True



ADD OPTION

CANCEL

SAVE

Native SQL Code

Native SQL Code

Use a Native SQL query for values and descriptions

Name*

Company - Native SQL

Description

Select Datasource*

Northwind

SQL Query

```
select 'CustomerId' as value, 'CompanyName' as description from Customers
```



Query Test Results:

```
> select 'CustomerId' as value, 'CompanyName' as description from Customers
```

Test Results (First 1 rows):

1: CustomerId: CompanyName

HIDE RESULTS