




Informer 4 to Informer 5 Bootcamp

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1. Best Practices
 2. Leverage Datasets (optional)
 3. Migration Steps
 4. We can help!
 5. What are we doing today?

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
 - Choose a few reports to start – you can add more later
- Review security and define Teams and Roles
- Validate reports after migration
- Additional setup for Unidata databases

Leverage Datasets



- Contrary to what you might have heard, you do NOT have to use Datasets
- You can migrate Ad hoc Queries from I4
- Datasets combine I4 and I5 functionality
- Migrate Datasources, Mappings, Links and Reports
- Migrated I4 reports become Ad hoc Queries in I5
- Ad hoc Queries can be converted to Datasets
- Use Datasets to build interactive reports (Dashboards, Comparison Boards, Data Views)
- Use post-query filters
- Use row-level security to share data
- Datasource security applies

Migration Steps

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



We can help!



Customized Training



Online Training Series – Entrinsik University



Onsite Training



Onsite Migration



Managed Services



What are we doing today?

- Import bundle with 5 reports from Informer 4
- Explain how security works
 - What can people see (Datasource share)
 - What can people do (role in a Team)
- Review Teams and Users
- Review Datasource and Mappings
 - Hide/Unhide Mappings
 - Scan Mapping
 - Restrict field
- Create Mapping Sets
- Assign Mapping Sets to Mappings
- Share Datasource using Mapping Sets
- Review migrated report
 - Edit and verify criteria and fields
 - Review Flowsteps
 - Run report
 - Validate data (I4 vs I5 results)
 - Access - Share report vs Change Owner
- Create Dataset from Ad hoc Query
- Create filters and save them
- Create visuals and save them
- Create a Dashboard report



Pre-session homework

This is going to be a hands-on session. Please complete the following steps before attending the Bootcamp:

- Have a working instance of I5
- Make sure your Datasource is connected and test connection
- Choose 2 reports from Informer 4 and tag them with “I5 Migration”
- Create I4 package with the 2 reports you want to migrate
- If you have a Unidata database, complete the additional Setup for Unidata Databases in the Migration Guide



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