



Tour of Informer 5

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Agenda

1. About Informer 5
2. New and Improved Homepage
3. Datasources
4. Queries
5. Visuals
6. Interact with Data
7. Jobs
8. Security
9. Informer Assistants



About Informer 5

- Provide a single source of truth with relevant Datasets
- Cleanse and prepare data with Flow Steps
- Govern data with Team & Role-based security
- Explore & analyze data with filtering
- Create and interact with visuals
- Personalize user content and collaborate with Team members
- Publish content online or embedded
- Use AI to create visuals and build assistants



New and Improved Homepage



- All content displays on Homepage
- Easily switch between areas of Informer
- Search and filter content
- See additional information on side panels
- Breadcrumb bar to make navigation easier
- Customize Homepage display
- Separate list pages for Informer content
- Access real-time documentation using Help Center Assistant

A screenshot of the Informer application's homepage. The interface is dark-themed. At the top, there's a search bar and navigation tabs for Home, News, and Visuals. A sidebar on the left contains navigation options like Home, Assistants, Reports, Datasets, Datasources, Jobs, Libraries, Teams, Users, and Administration. The main content area displays a list of items with columns for Item, Type, Last Modified, and Owner. The list includes items like "Refresh Applications Demo Dataset" and "Applications Demo Dataset". On the right, there's a "Informer Help Center" sidebar with a question mark icon and the text "How can I help you today?".

Item	Type	Last Modified	Owner
Refresh Applications Demo Dataset	Job	Aug 11, 2025, 10:12 AM EDT	Robin Lamb
Refresh ST - Course Sections	Job	Aug 11, 2025, 10:12 AM EDT	Regina Lopez
Refresh Applications Demo Dataset	Job	Aug 11, 2025, 10:12 AM EDT	Robin Lamb
Refresh Applications Demo Dataset	Job	Aug 11, 2025, 10:12 AM EDT	Robin Lamb
Refresh Applications Demo Dataset	Job	Aug 11, 2025, 10:12 AM EDT	Robin Lamb
Applications Demo Dataset	Dataset	Aug 11, 2025, 1:19 AM EDT	Demo
Refresh ST - Course Sections	Job	Aug 10, 2025, 11:46 AM EDT	Regina Lopez
ST - Course Sections	Dataset	Aug 10, 2025, 11:46 AM EDT	Demo Administrator
Refresh Banner - Applications	Job	Aug 8, 2025, 8:07 AM EDT	Robin Lamb
Ellucian Financial Dashboard	Dashboard	Aug 7, 2025, 11:49 AM EDT	Demo
Refresh ST - Course Sections	Job	Aug 5, 2025, 2:52 PM EDT	Regina Lopez

Datasources

Connect Informer to your data

- SQL Databases
 - Multiple options available
- U2 Databases
 - Multi-level data structures
- Web Datasources
 - Connect to external web-based tools
- Workspaces
 - Collection of one or more CSV files
- Combine data from multiple sources



Datasources



Define Mappings

Drag on a spreadsheet to create Workspace

Create links within and between Datasources

Define security

- Restrict sensitive fields
- Define Mapping Sets
- Determine level of access

Datasource can be owned or shared



Pull data from one or more Datasources



Queries are made up of Fields and Criteria

Fields = fields on a SQL table or U2 file
Criteria = where clauses to filter data to smaller number of rows



Flow Steps

Post-query steps used to prepare, augment, cleanse data

Types of Queries



Datasets

- ✓ Persisted results refreshed on demand or on a schedule
- ✓ Promotes data governance – one source of truth
- ✓ Used to build Informer content
- ✓ Reduces load on database
- ✓ Filters can be used to pare down data



Ad hoc Queries

- ✓ Temporary real-time results
- ✓ Query database every time
- ✓ Same as I4 reports
- ✓ Filters can be used to pare down data
- ✓ Can be converted to Dataset

Discover Feature



Automatically creates visuals for you based on fields selected

- Lots of visual options
- Lots of configuration options
- Share visuals
- Save visuals

Create Visuals



Create your own visuals

- Choose from many chart options (Pie, Bar, Column, Area, Spline, Trend, Maps, Pivot Tables, and more!)
- Lots of configuration options
- Share visuals
- Save visuals

Magic Visuals



Let Informer AI create the visuals for you

- Generate visuals with minimal effort
- Can be configured and customized
- Share visuals
- Save visuals

Interact with Data

- Queries
 - Interact with raw data
- Dashboards
 - Interact with visuals
- Comparison Board
 - Compare data side-by-side
- Data View
 - Grid view of a Dataset, can be pre-filtered
- Templates
 - Customizable format for viewing and exporting
- Informer Assistants
 - Interact with data by asking questions

Group	Order Date	Required Date	Ship Address	Ship City	Ship Region	Ship Postal Code
> Boise (116)				Boise		
> Albuquerque (71)				Albuquerque		
> Seattle (40)				Seattle		
▼ Anchorage (24)				Anchorage		
	9/13/1996	10/11/1996	2743 Bering St.	Anchorage	AK	99508
	9/13/1996	10/11/1996	2743 Bering St.	Anchorage	AK	99508
	9/13/1996	10/11/1996	2743 Bering St.	Anchorage	AK	99508
	10/25/1996	11/22/1996	2743 Bering St.	Anchorage	AK	99508
	10/25/1996	11/22/1996	2743 Bering St.	Anchorage	AK	99508
	2/10/1997	3/24/1997	2743 Bering St.	Anchorage	AK	99508
	7/9/1997	8/16/1997	2743 Bering St.	Anchorage	AK	99508
	7/9/1997	8/16/1997	2743 Bering St.	Anchorage	AK	99508
	9/24/1997	10/22/1997	2743 Bering St.	Anchorage	AK	99508
	9/24/1997	10/22/1997	2743 Bering St.	Anchorage	AK	99508



Jobs

- Task or collection of tasks to be executed
Dataset, Ad hoc Query, Template
- Can be automated using recurring schedule or on demand
Specify recurring schedule
- Actions
Email, Email burst, Save to file system, SFTP, One Drive

Teams and Users allow you to:

- Define ownership
- Share content
- Control access to sensitive information
- Custom access using Mapping Sets
- Content can be owned or shared

Users can come from:

- Local Users
- LDAP/Active Directory
- SAML (SSO)

Informer AI



Help Center

Built-in documentation assistant with real-time access to the Informer knowledge base



Copilot

Advanced tasks become easy with Informer's content-aware Copilot

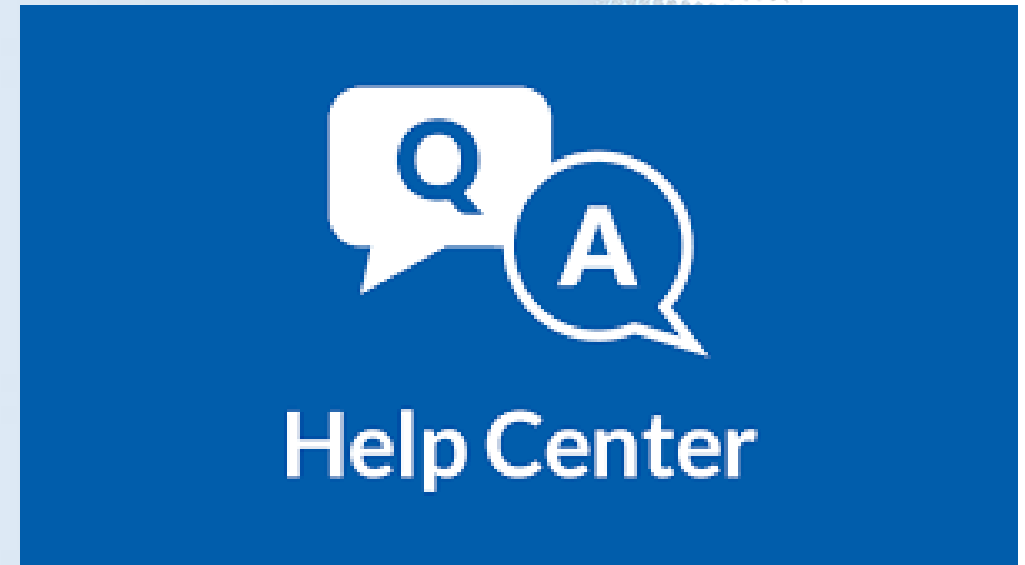


Assistants

Build and deploy your own assistants tailored to specific users

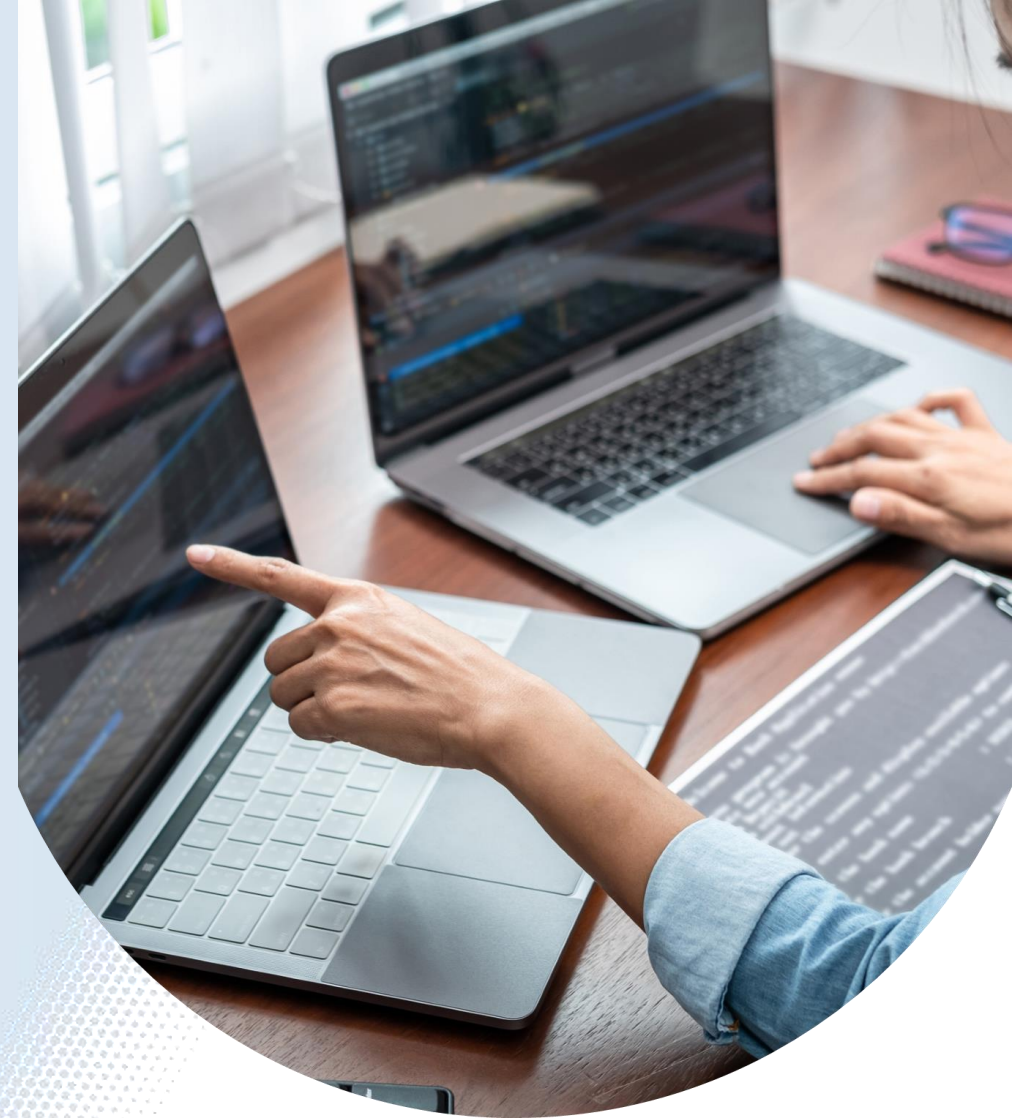
Help Center

- Ask how-to questions about Informer
- Provide answers to end-users without involving IT
- Ask follow-up questions for clarification
- Ask for step-by-step instructions
- Get immediate answers without leaving the UI



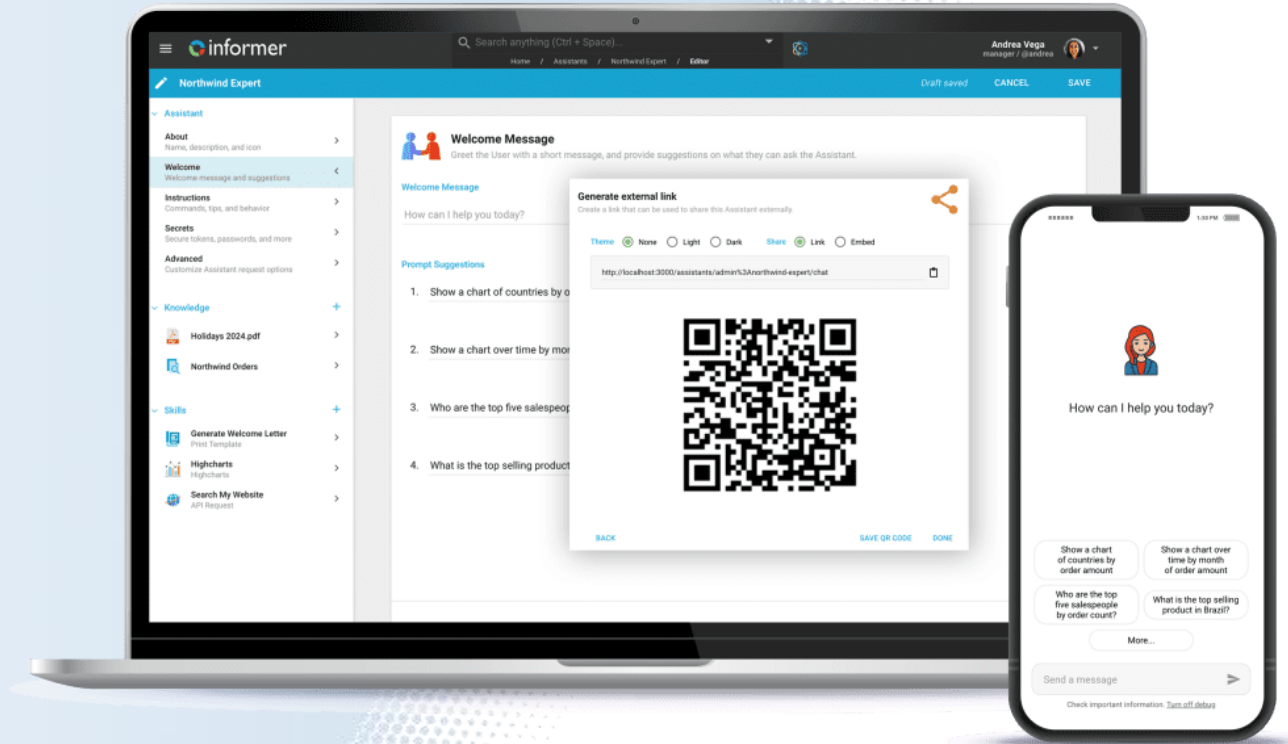
Informer Copilot

- Keeps track of where you are in Informer
- Helps you create, fix, understand content
- SQL queries
- Power scripts
- Calculated fields
- Visualizations
- HTML Templates
- Instant new skills (Javascript, HTML, SQL)
- Like having a virtual employee



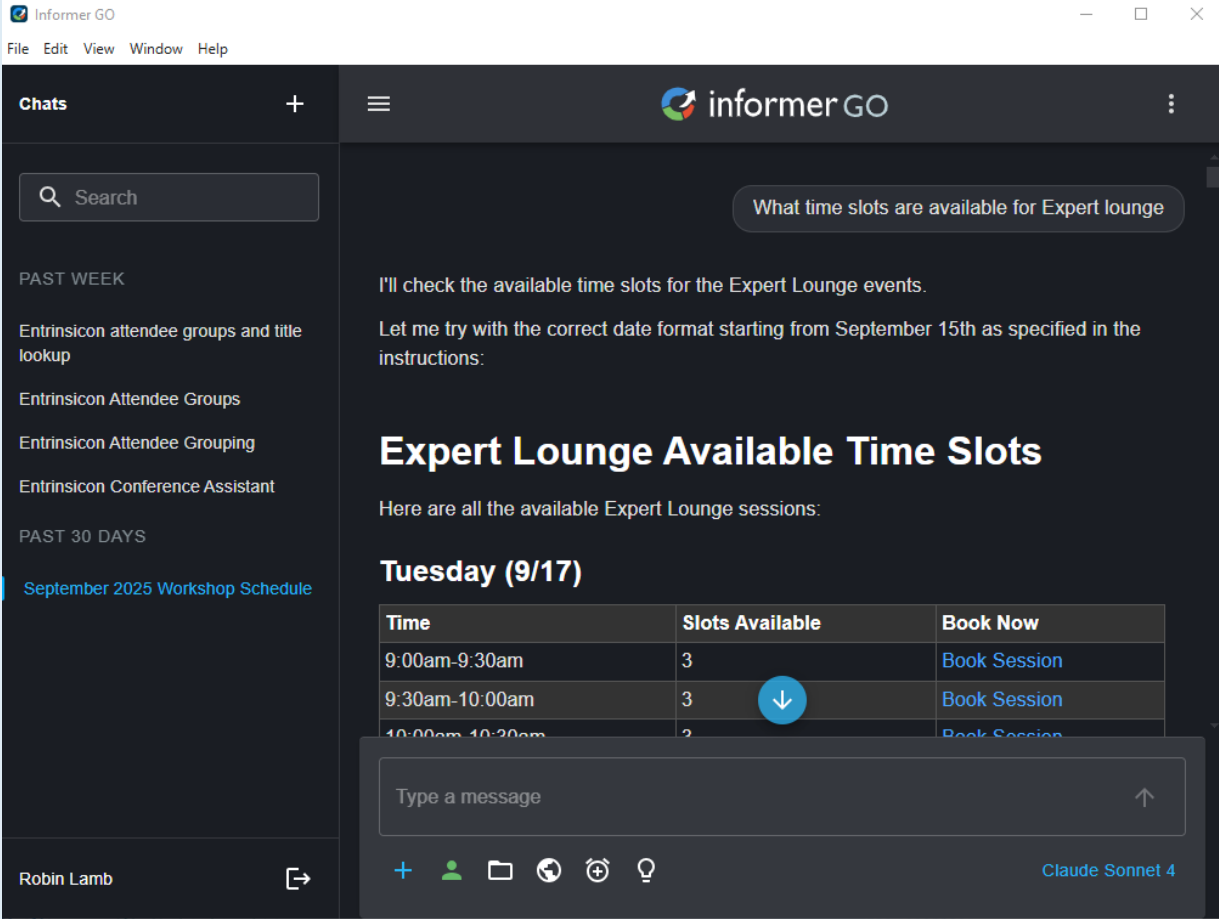
Assistants

- Give the Assistant Purpose
 - Name, Avatar, Prompts, Instructions
- Build the Assistant's Knowledge base
 - Datasets, Files (PDF, HTML, Text), Website Search
- Choose the Assistant's Skills
 - Charts, Templates (pixel perfect, e.g. transcript)
- Access an API (integrate with your applications)
- Share with others
- All permissions and security are in place
- Full adheres to Data Governance



Informer GO

- Downloadable App
- Mobile Friendly
- Make use of multiple LLM's





Thank you!

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