



Tour of Informer AI

Andrea Vega

VP of Informer Engineering



The Tour



1. Get Started with AI
2. Help Center & Copilot
3. Magic Visuals *
4. Assistants *
5. Libraries *
6. Sharing and Security

...**DEMO TIME!** ... **AND Q&A!**

* there is a whole session on this topic!

Get Started with AI - Enable

The screenshot shows the Informer administration interface. The left sidebar contains a menu with categories: System (Settings, AI, Billing, Tenants), Authentication (API Tokens, Client Apps, Domains, Integrations, Sessions), Customization (Codes, Features, Global Colors, Letterheads, Saved Functions, Theme, User Fields), and Maintenance (Bundles, Console Logs). The 'AI' menu item is highlighted with a green arrow. The main content area has a header with 'AI' and a toggle switch labeled 'Enabled', which is also highlighted with a green arrow. Below the header, a message states 'AI is disabled. However, you may still make changes to the AI settings on this page.' with an 'ENABLE AI NOW' button. The 'Overview' section shows a credit balance of \$495.18 and a monthly usage of \$0.90 for September. A 'Monthly Usage' table is shown below.

Total Cost	Request Count	Average Request Cost
\$0.90	25	\$0.04

Get Started with AI – Grant Access


Allow all users, or only allow certain Users and Teams

Price limit (Optional) lets you control cost

- Price limit can be on a specific User
- Price limit on Team means everyone in that team gets the value added to their quota
- Each person gets the sum of their limit + any Teams they are on



Access

Allow all users Select Users and Teams

AI Access and Monthly Cost Limit 

Set the maximum amount that can be spent on AI features each month for the particular Users. For a Team, the limit is for each User in the Team.

Teams and Users *

 Pam Barber  Demo

Monthly Cost Limit Per Person (blank for no limit)

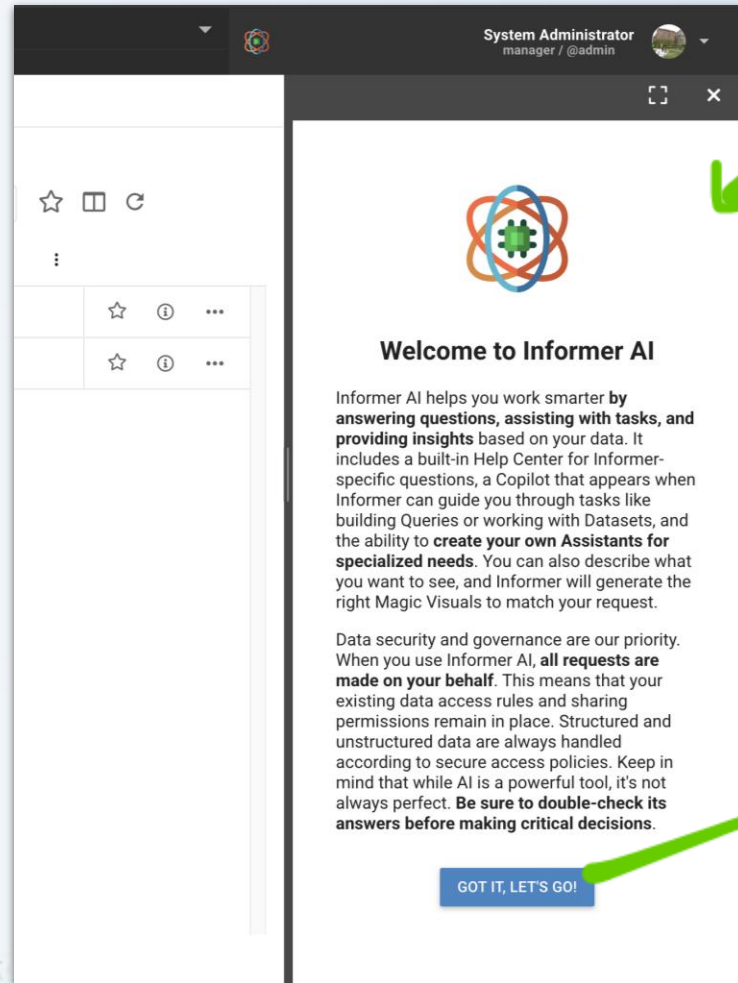
Limit in Dollars

100

Get Started with AI – Now use it!

informer Search anything (Ctrl + Space)... System Administrator manager / @admin

Home / Administration / AI



A screenshot of a web browser window showing the 'Welcome to Informer AI' page. The page features the Informer logo at the top, followed by the heading 'Welcome to Informer AI'. Below the heading is a paragraph of text describing the capabilities of Informer AI, such as answering questions, assisting with tasks, and providing insights. A second paragraph discusses data security and governance. At the bottom of the page is a blue button that says 'GOT IT, LET'S GO!'. A green arrow points from the top right of the browser window to the Informer logo on this page.

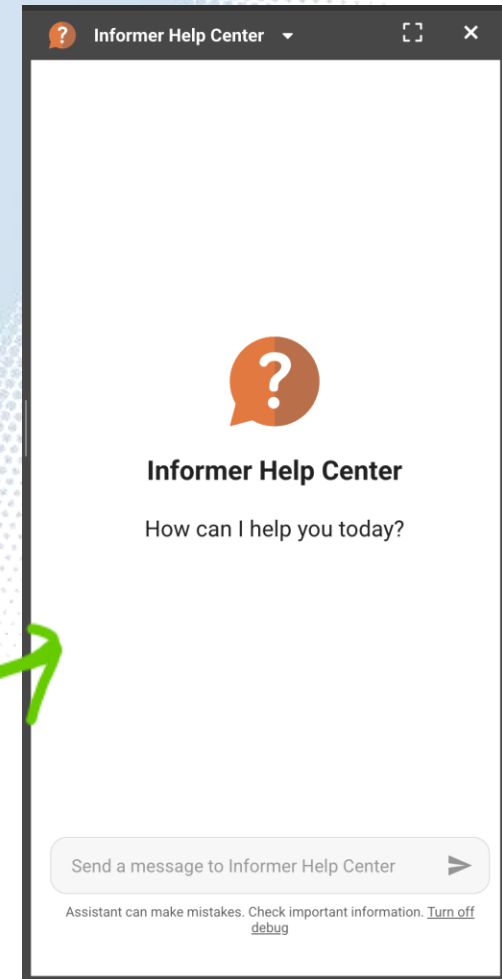
System Administrator manager / @admin

Welcome to Informer AI

Informer AI helps you work smarter by **answering questions, assisting with tasks, and providing insights** based on your data. It includes a built-in Help Center for Informer-specific questions, a Copilot that appears when Informer can guide you through tasks like building Queries or working with Datasets, and the ability to **create your own Assistants for specialized needs**. You can also describe what you want to see, and Informer will generate the right Magic Visuals to match your request.

Data security and governance are our priority. When you use Informer AI, **all requests are made on your behalf**. This means that your existing data access rules and sharing permissions remain in place. Structured and unstructured data are always handled according to secure access policies. Keep in mind that while AI is a powerful tool, it's not always perfect. **Be sure to double-check its answers before making critical decisions.**

GOT IT, LET'S GO!



A screenshot of the 'Informer Help Center' interface. It features a large orange question mark icon at the top, followed by the heading 'Informer Help Center' and the text 'How can I help you today?'. At the bottom, there is a text input field with a 'Send a message to Informer Help Center' button and a right-pointing arrow. Below the input field is a small disclaimer: 'Assistant can make mistakes. Check important information. Turn off debug'.

Informer Help Center

How can I help you today?

Send a message to Informer Help Center

Assistant can make mistakes. Check important information. [Turn off debug](#)

Help Center

- Always up to date with live access to our documentation
- Ask for step-by-step instructions tailored to you
- Ask follow up questions

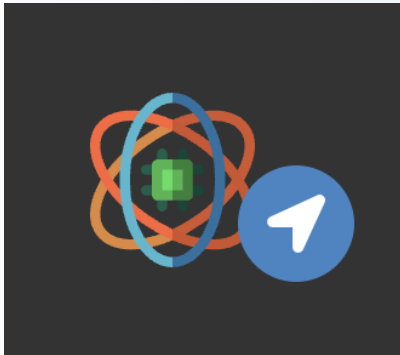
The screenshot shows a chat window titled "Informer Help Center". It contains three messages:

- You** (Sep 15, 2025 at 5:20 PM): "Give me detailed instructions on how to make a dashboard filter by date"
- Informer Help Center** (Sep 15, 2025 at 5:20 PM): A search bar containing "searchDocs" with a dropdown arrow.
- Informer Help Center** (Sep 15, 2025 at 5:21 PM): "Here are detailed instructions on how to make a dashboard filter by date using Dashboard Input Filters:"
 - 1. Create or open a Dashboard:**
 - Click the "+ New" button in Informer and select "Dashboard" under the Reports section.
 - Enter a name and select a Dataset to build the Dashboard from, then click "Save."
 - You will see a blank canvas for your Dashboard.
 - 2. Add a Date Range Input Filter to the Dashboard:**
 - In the Dashboard editor, click the "+" button next to "Elements" on the left menu.
 - Select "Input" from the options.
 - Choose "Date Range" as the type of Input.
 - This Input allows users to filter data between two specific dates.
 - You can type dates in a valid format (e.g., MM/DD/YYYY) or use date keywords like TODAY, NOW, etc.
 - 3. Configure the Date Range Input Filter:**

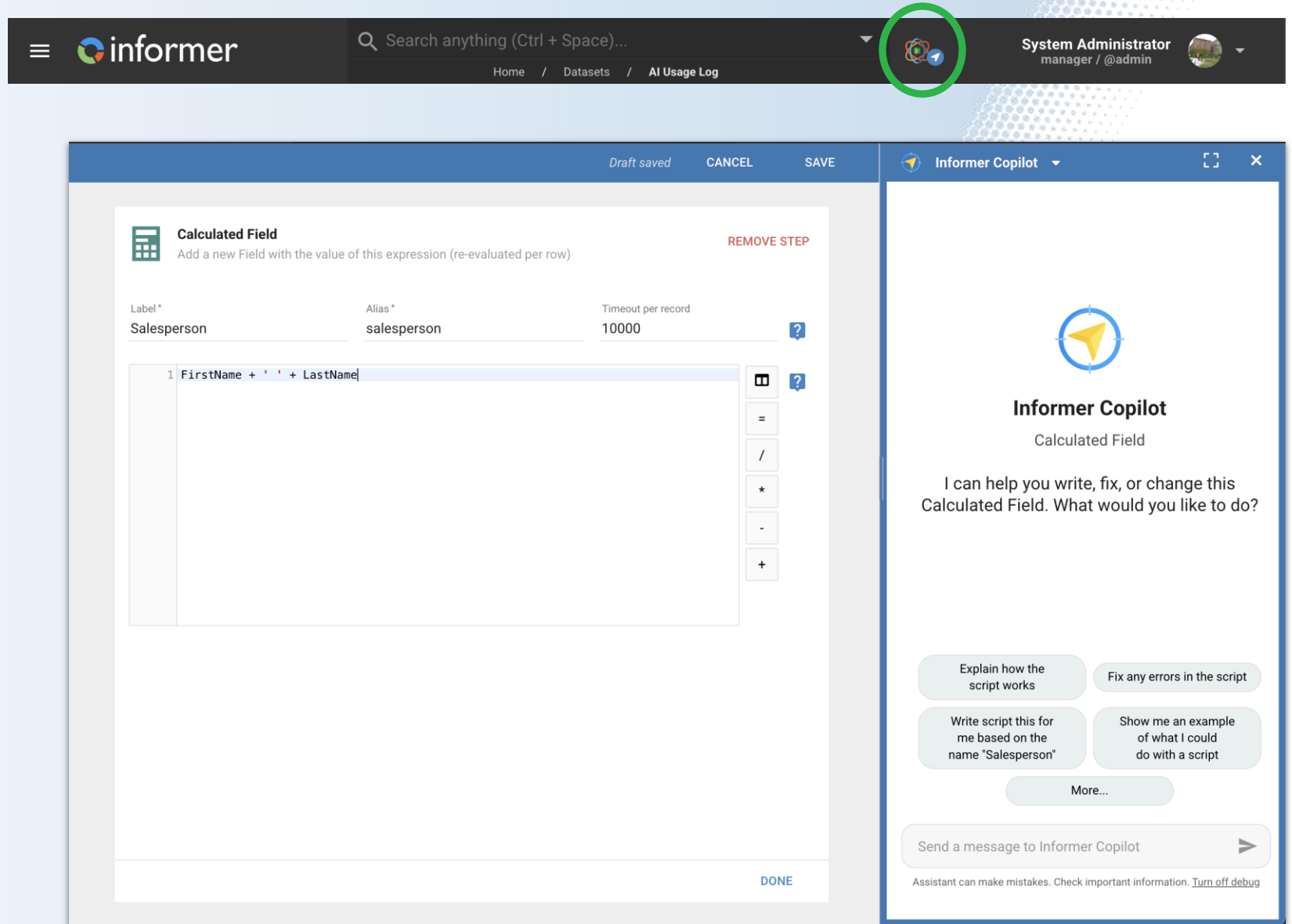
At the bottom of the chat, there is a search bar with the letter "a" and a blue arrow button. Below the search bar, it says "Assistant can make mistakes. Check important information. [Turn off debug](#)".

Copilot

When Informer can help with your task, this icon appears



Then the Copilot can make changes on your behalf and/or answer questions about content



Draft saved CANCEL SAVE

Search anything (Ctrl + Space)...

Home / Datasets / AI Usage Log

System Administrator manager / @admin

Calculated Field REMOVE STEP

Add a new Field with the value of this expression (re-evaluated per row)

Label *	Alias *	Timeout per record
Salesperson	salesperson	10000

```
1 FirstName + ' ' + LastName
```

Explain how the script works

Fix any errors in the script

Write script this for me based on the name "Salesperson"

Show me an example of what I could do with a script

More...

Send a message to Informer Copilot

Assistant can make mistakes. Check important information. [Turn off debug](#)

DONE

Magic Visual

Ask for whatever visual you want to see from your Datasets!

Examples

- Complex charts
- Interactive grid with sparklines
- A row of KPIs

The screenshot displays the 'Configure Visual' interface. The top navigation bar includes 'Configure Visual', 'DATA', 'TRANSFORM', and 'MODEL'. The main area is divided into two sections. The left section, titled 'Magic Visual (Beta)', asks 'What type of visual would you like to see?' and lists several configurations:

- You**: Group them by continent (Sep 15, 2025 at 5:39 PM)
- Magic Visual (Beta)**: examples (Sep 15, 2025 at 5:39 PM)
- Magic Visual (Beta)**: datasetSearch (Sep 15, 2025 at 5:39 PM)
- Magic Visual (Beta)**: update (Sep 15, 2025 at 5:39 PM)

The right section, titled 'Sankey Chart of Top 5 Products and Continents', shows a visualization of product flows between continents. The products listed are Raclette Courdavault, Camembert Pierrot, Gorgonzola Telino, Guaraná Fantástica, and Gnocchi di nonna Alice. The continents shown are Europe, North America, and South America. The visualization uses colored flows to represent the distribution of each product across the continents.

Magic Visual – chat to refine

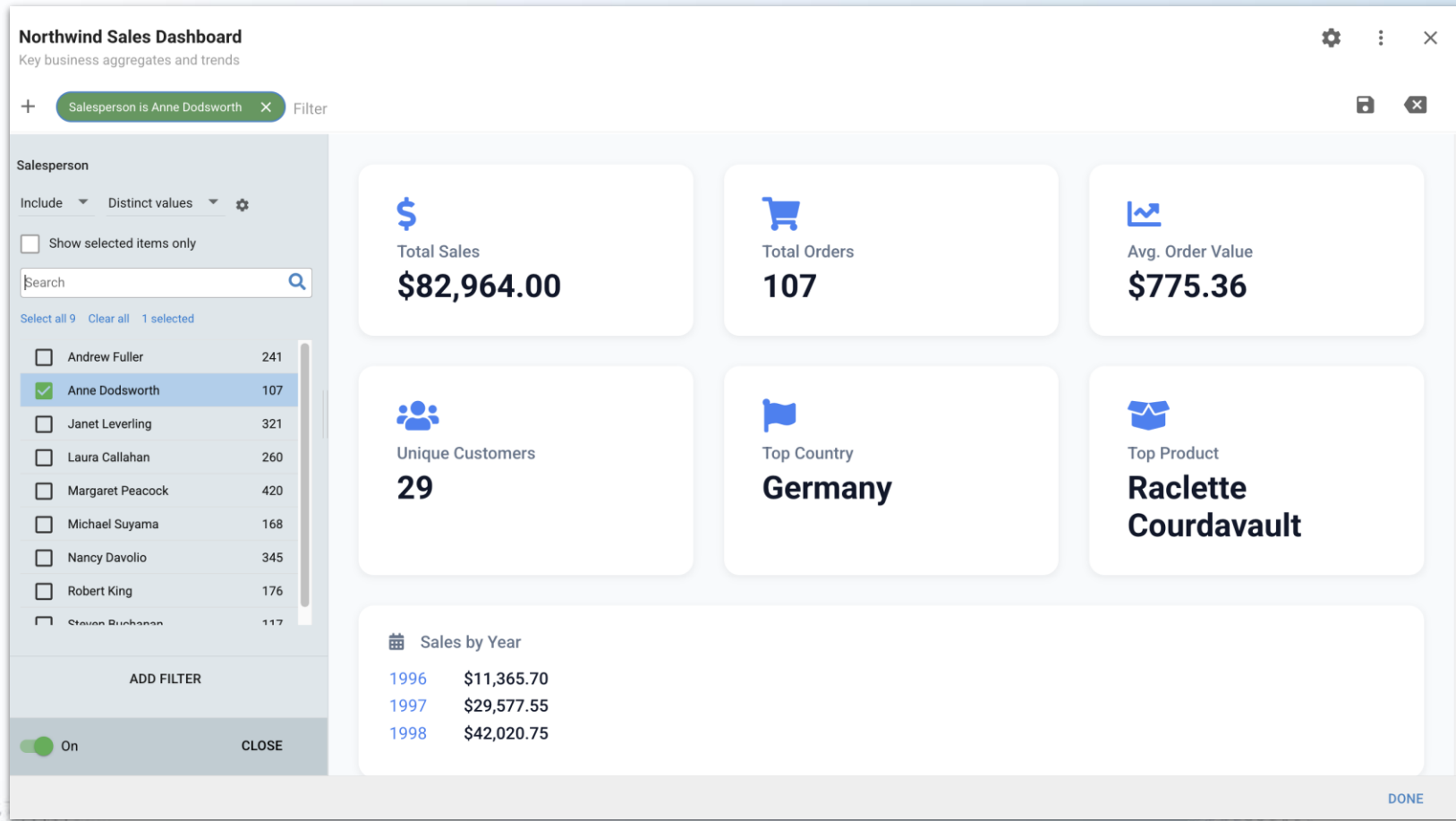
Keep chatting with your Magic Visual until you see the result you want.

Once you save it, now it's a real visual!

Informer AI remembers your preferences and uses them for the next one

The screenshot displays the 'Configure Visual' interface. On the left, a chat window shows a user asking for a Sankey chart of products and countries, followed by the AI assistant providing examples and an update. The right side shows the resulting Sankey chart titled 'Sankey Chart of Products and Continents'. The chart maps various products to three continents: Europe, North America, and South America. The products listed on the left include Raclette Courdavault, Camembert Pierrot, Gorgonzola Telino, Guaraná Fantástica, Gnocchi di nonna Alice, Tarte au sucre, Jack's New England Clam Chowder, Rhönbräu Klosterbier, Chang, Pavlova, Flotemysost, Boston Crab Meat, Konbu, Lakkalikööri, Manjimup Dried Apples, Outback Lager, Sir Rodney's Scones, Chai, Mozzarella di Giovanni, and Original Frankfurter grüne Soße. The chart uses colored flows to show the distribution of each product across the continents.

Magic Visual – same live data perk as other visuals



These can be **filtered** on Dashboards and always reflect **current Dataset** data – just like any other visual!

Once made, the AI is out of the picture – no waiting for the AI to compute

Magic Visual – under the hood

```
1  [
2  {
3    "datasetId": "38f7592b-4395-43aa-80b3-84938f1b2d5b",
4    "datasetAlias": "38f7592b-4395-43aa-80b3-84938f1b2d5b",
5    "search": {
6      "size": 0,
7      "aggs": {
8        "products": {
9          "terms": {
10             "field": "ProductName",
11             "size": 20
12           },
13          "aggs": {
14            "countries": {
15              "terms": {
16                "field": "ShipCountry",
17                "size": 100
18              }
19            }
20          }
21        }
22      }
23    }
24  }
25 ]
```



```
46
47 const nodes = Array.from(nodesSet).map(name => ({ id: name }));
48
49 return {
50   highchart: {
51     chart: { type: 'sankey' },
52     title: '',
53     credits: { enabled: false },
54     exporting: { enabled: true },
55     series: [{
56       keys: ['from', 'to', 'weight'],
57       data: links.map(l => [l.from, l.to, l.weight]),
58       type: 'sankey',
59       name: 'Product Flow',
60       label: { enabled: false }
61     }],
62     tooltip: {
63       pointFormat: '<b>{point.fromNode.name}</b> → <b>{point.toNode.name}</b>: <b>{point.weight}</b> orders'
64     },
65     plotOptions: {
66       series: {
67         dataLabels: { enabled: true }
68       }
69     }
70   }
71 }
```

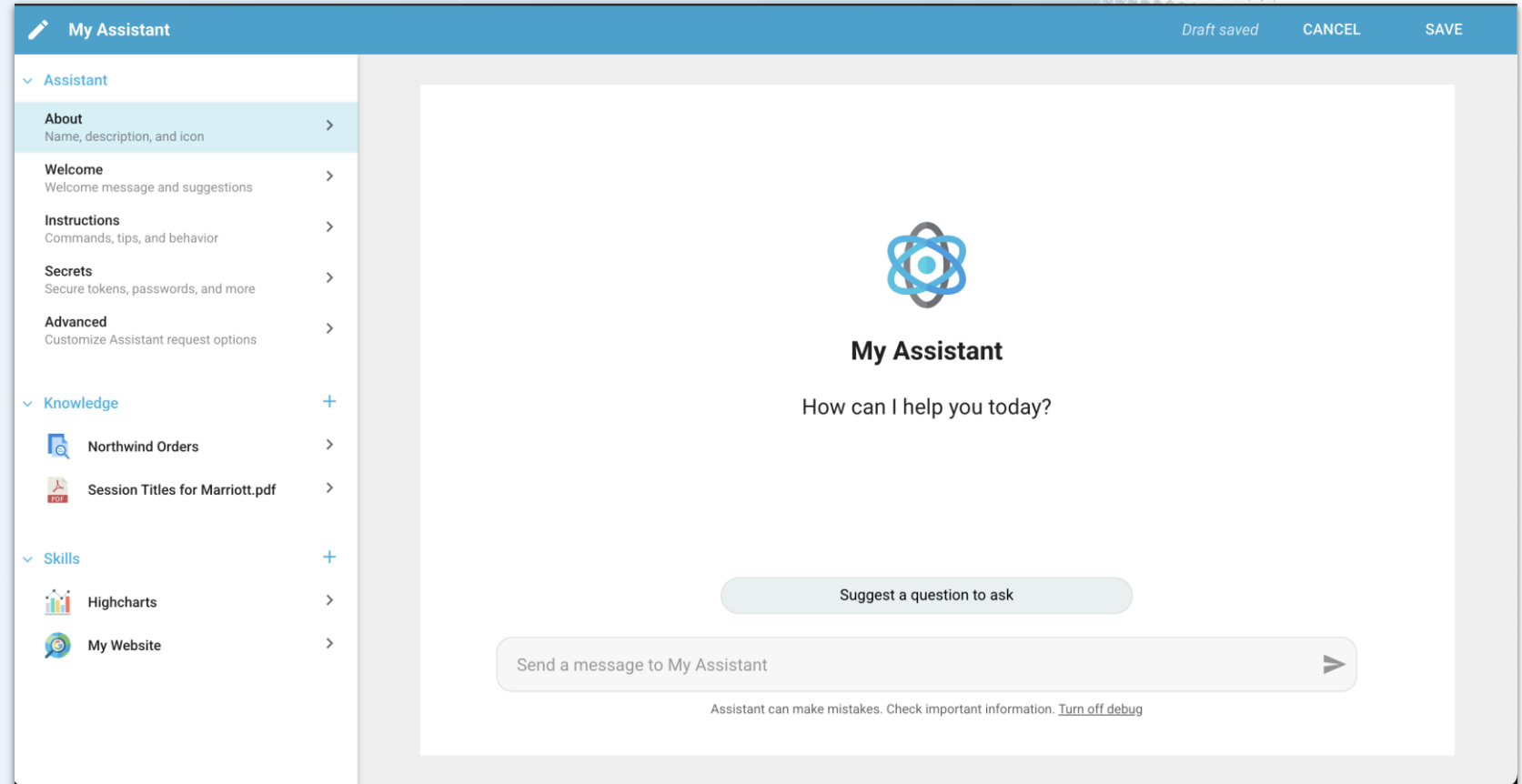
Assistants

You decide what the AI has!

- Attributes
- Knowledge
- Skills

This is how you ask questions about your data – and give instructions.

Skills is also where you can bring in API integrations and other advanced skills




Libraries



Keep the AI synced with your files in OneDrive, Google Drive, Box.com, Github

- Opt-in which files should sync with AI
- Add to Assistants so the Assistant always has the up-to-date files
- Use in Jobs to upload template and data exports

Entrinsicon Sharepoint

Configure and Sync Library 

OneDrive Account

Name Andrea Vega
email andrea@entrinsik.com

Which folder should the Library connect to?

Your Personal OneDrive

SharePoint Site




Team Folder

- Entrinsicon
- Entrinsik Inc Team Site
- Entrinsik Marketing
- Informer Certification
- Informer Engineering

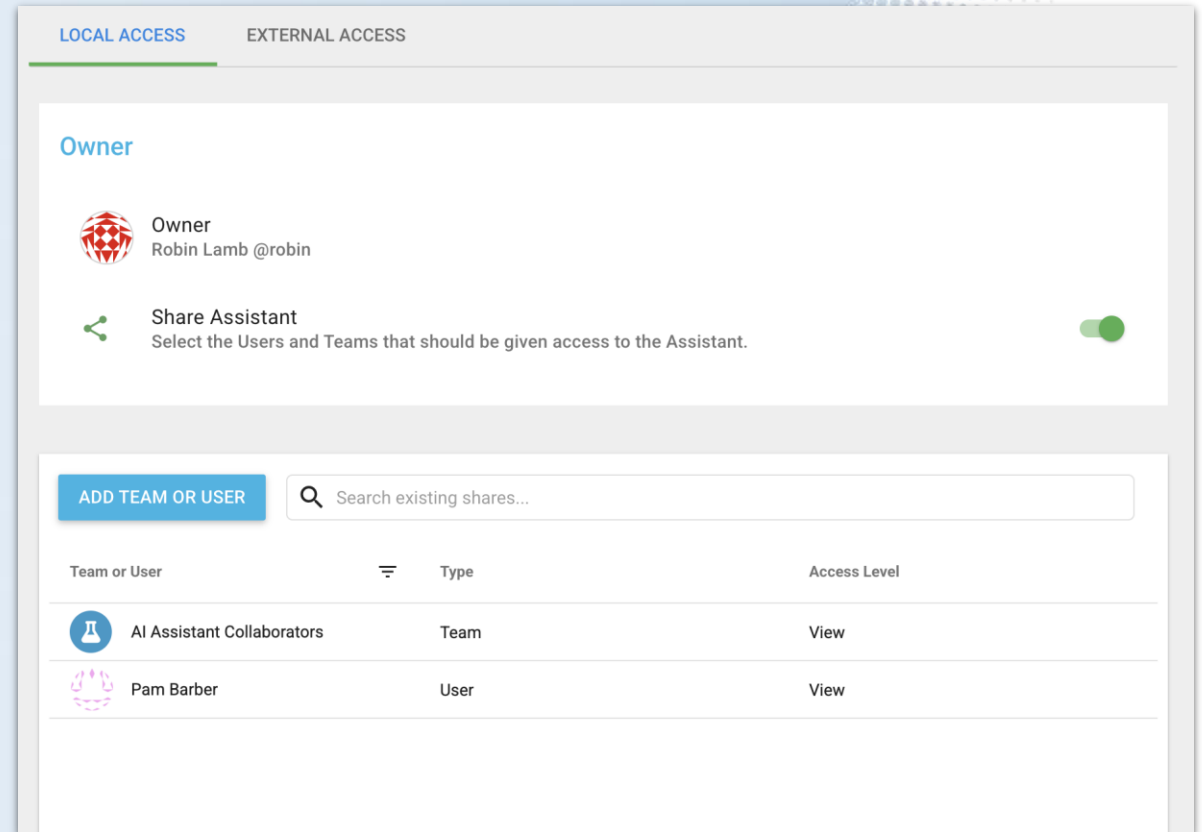
Sharing and Security

Assistants are shareable just like Reports and Datasets

Chat messages always adhere to the current User's access.


-  Read access
-  Row level security
-  Field level security


If a User has access to an Assistant but **not** an item used within, the Assistant only knows what the User does during chat.





LOCAL ACCESS EXTERNAL ACCESS

Owner

 Owner
Robin Lamb @robin

 Share Assistant
Select the Users and Teams that should be given access to the Assistant.

[ADD TEAM OR USER](#)

Team or User	Type	Access Level
 AI Assistant Collaborators	Team	View
 Pam Barber	User	View



“What Dataset? I don't have a Dataset”



DEMO TIME!





Thank you! Questions?

Andrea Vega

VP of Informer Engineering | [linkedin.com/in/ald-vega](https://www.linkedin.com/in/ald-vega)

