



Informer 4 to Informer 5 Migration

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Because Informer 5 is built on a completely new architecture, moving from Informer 4 to Informer 5 is a migration, not an upgrade. There are many ways to approach this migration, and we have developed a sample migration strategy to assist with this project. Whether choosing to use Informer 5 like Informer 4 or starting fresh by recreating all new content in Informer 5, this document provides the information needed to help with the process. Our Data Gathering Workbook will help you collect and document the information needed during your Informer 4 to Informer 5 migration and to keep track of your progress. The workbook includes suggested tabs, but feel free to modify the workbook to document your organization's individual migration plan.

The articles referenced in this document are found in our [Informer 5 Help Center](#). For further assistance, please email i5support@entrinsik.com.

Best Practices

Below is a list of recommended best practices as you prepare for your migration:

- Upgrade to the current production version of Informer 4 before creating an import package. Click [here](#) to see the current Informer 4 production version
- Run each version of Informer on a separate server. Both versions can run simultaneously for as long as needed
- If the choice is to migrate content, it is crucial to clean up Informer 4 before converting
 - Do not convert everything from Informer 4
 - Create an inventory of reports that need to be converted
 - Meet with users to determine what reports are needed and ask them to prioritize them
 - Use Data Gathering Workbook to track reports to migrate
- Review security and start defining the Teams and Roles in Informer 5

What Migrates and What Does Not

During the migration from I4 to I5, there are some features that will come over and others that will not:

Will Migrate	Will NOT Migrate	Coming soon...
Datasources (Mappings, Links, SQL Functions)	Dashboards	Queries with sub-selects for SQL Databases
Reports (become Ad hoc Queries)	Live Excel files	
Local groups (become Teams)	Users assigned to Groups	
Local users	Export PDF Templates	
Calculated columns with Java or JavaScript	Schedules	
Saved functions		
Code Files		
Mapping Suites		

Migration Steps

Depending on the migration strategy and whether content is being imported from Informer 4, the steps outlined below need to be completed:

- Hold meetings to discuss and document:
 - Reports and/or Datasets that need to be created and/or imported
 - Security and Teams structure
 - Training
 - Use the Data Gathering Workbook provided to collect and document this information
- Clean up Informer 4
- Install Informer 5
- Complete additional setup required for Unidata Databases
- Setup Security – Users and Teams
- If migrating content from Informer 4:
 - Package and import Datasources/Mappings
 - Clean up Informer 4 and tag reports to migrate
 - Package and import tagged reports

- Validate Ad hoc Queries after import
- Recreate Live Excels
- Recreate Dashboards
- Recreate Schedules as Jobs
- Design and build new Datasets
- Design and build new Reports
- Share Datasources and Queries to Users/Teams
- Train end users and develop documentation

Clean up Informer 4

Below are some suggestions on cleaning up the Informer 4 instance before packaging content to be imported into Informer 5:

- If a report has never been run or has not been run in a reasonable time (one year/six months), do not convert it. You can access a list of Informer 4 Internal Audit Reports [here](#) to assist with cleanup.
- Ask users to prioritize their reports and supply a list of the reports that need to be converted. Remember, reports can always be recreated after the initial migration. In addition, as long as Informer 4 remains running, it is easy to package single reports and bring them over as needed.
- After identifying the report inventory, try to consolidate multiple similar reports into one. There may be different versions of the same report created for different users, which can be converted into one Report/Dataset that can be shared with everyone.
- Consider adding a tag of “migration” to the reports that will be migrated to Informer 5. to make the selection of these reports easier when creating the report package.
- Use the Data Gathering Workbook to collect and document this information.

Install Informer 5

Go to the Informer 5 Help Center to review the articles related to Installing and Upgrading Informer.

- Before you install: [Read Me First!](#)
- Specifications to set up your environment: [Hardware and Software Requirements](#)
- Instructions for Windows installations: [Installing Informer 5 \(Windows\)](#)

- Instructions for Linux or Docker Installations: [Installing Informer 5 \(Linux w/Docker\)](#)
- You can schedule installation assistance with our Client Services team using this [calendar](#)

Additional Setup for Unidata Databases

There is additional setup required for Unidata Databases to work with I-descriptors and Calculated Columns. Follow the instructions in the articles below to ensure Informer will work as expected:

- [How Do I Add an Initialization Subroutines to a Datasource?](#)
- [Increase the VFIELDSIZE](#)
- [Dictionary Type Update](#) (only necessary if dictionary type is empty)
- [Links with mismatched field types](#) (if found, fix in Informer 4 before migrating)

Security – Users and Teams

Informer 5 addresses Security and Data Governance through a Teams security model.

Teams and Users allow you to:

- Define ownership
- Share content
- Control access to sensitive information
- Provide custom access using Mapping Sets for Mapping based restrictions

Users can be migrated from Informer 4, but User permissions must be assigned within Informer 5.

Help Center links on Security:

[Security Overview](#)

[Security Setup](#)

[Teams](#)

[Local Users](#)

[LDAP/Active Directory](#)

[SAML \(SSO\)](#)

Importing Informer 4 Content

Datasources, Mappings, Fields, Links and Reports can migrate from Informer 4. It is suggested to import Mappings first to create the list of files/tables, fields/columns and links that are used in the reports. Steps to migrate content:

Package and Import Mappings and Reports

- Determine the Informer 4 java version first. You will be asked to confirm your version when importing reports. [Java 7 or Java 8 on my system?](#)
- Create a package of the Datasources and Mappings/Links from Informer 4 - [Creating a Package Using Package Manager](#)
- Download and save the package
- Drag the .ixp file on to the Informer 5 UI
- Chose to either create a new Datasource or merge with existing Datasource
- Click Save
- Click Done
- When importing reports, it is recommended to choose a few reports, create the package, and follow the instructions above. Drag the package into Informer 5 and merge with an existing Datasource. The reports from Informer 4 will show up in Informer 5 as Ad hoc Queries in the Reports area.

If importing reports that reference Mapping Suites, the Mapping Suites must also be included in the package.

Click [here](#) to access the entire article on migrating Mappings and reports

Validate Ad hoc Queries

If reports are imported, validate the results after the import:

- Each Informer 4 report is now an Ad hoc Query in Informer 5. Validate the following was migrated correctly:
 - Mapping
 - Fields
 - Criteria
 - Inputs (Prompts)
 - Flow steps (Java Calculated Columns, Merge Duplicates, and Normalize)

- Run the report in both versions and verify the results match
- If desired, create a Dataset from an Ad hoc Query after the Query is run

What needs to be recreated

The following will **not** convert and will need to be recreated in Informer 5:

- *Dashboards* – Dashboards are created from Datasets in Informer 5, so Ad hoc Queries will need to be converted to a Dataset. To understand how Dashboards work in Informer 5, see [What is a Dashboard?](#)
- *Live Excel Reports* – determine what reports will continue to be available as Live Excel. The report will convert, but it needs to be exported and shared with users.
- *Schedules* – Schedules will need to be rebuilt in Informer 5. They are called *Jobs*.

[Informer 4 Internal Audit Reports](#) has a list of reports that will assist you in identifying Dashboards, Live Excel reports and scheduled jobs. Use these reports to determine what needs to be recreated in Informer 5.

Datasets vs Ad hoc Queries

There are two types of Queries available in Informer. Click [here](#) for more information.

Dataset	Ad hoc Query
Query runs on refresh only (on demand or schedule)	Query runs every time the Query is executed
Results are persisted	Results are temporary
Used to create Dashboards, Comparison Boards and Data View Reports	Visuals cannot be saved
Larger volume of data	Smaller volume of data
Data integrity – everyone is reporting on the same data	Temporary Data – it changes each time the Query is executed

Additional articles on building content:

[Creating a Dataset](#)

[What is a Report?](#)

[Creating a Report](#)

Share Datasource and Queries

To allow users to launch or create a Report, the Datasource must be shared with them or a Team they belong to. If reports are migrated, they need to be shared and/or owned by a Team or User. See [Datasource Ownership and Access](#).

Training and Consulting Services

Entrinsik training opportunities:

- Online Training
- Customized Training
- On-site Training
- On-site/Online Consulting
- Schedule internal training with end users as needed

Click [here](#) for additional information on these services.

Informer 4 and Informer 5 Content Comparison

Below are some comparisons of content in Informer 4 and Informer 5

Reports

Informer 4 Prompts become Inputs and Calculated Columns become Flow Steps

Informer 4 Report

REPORT TEMPLATE

DATA

USER SETTINGS

SCHEDULES

LIVE EXCELS

CUSTOM FORMAT

Informer Mappings REL

Informer Report

List of Informer mappings

Delete

Permissions

Lock

Live Excel

Copy

Package

Tags

Overview

Title

Informer Mappings REL

Description

List of Informer mappings

Datasource

Informer

Mapping

MAPPING

Select Filter

MAPPING.Created On on or after '15/01/2019'

Columns

ID, Name, Table Name, Alias, Created By, Created On, Modified By, Modified On, Datasource, Owner ID, Owner Type, Version, Datasource ID, Alias, DATASOURCE ID, DESCRIPTION, ID, LEGACYREFERENCE, NAME, OWNER REPID, Owner ID, Owner Type, Table Name, Version

Sorts

Name (ASC)

Groups

None

Multi Value View

None

PDF Template

System default

Sharing

Private

Limit Result Count

(None)

Tags

Informer

Owner

System Administrator

Created by

System Administrator

Mar 4, 2019

Last modified by

System Administrator

Mar 28, 2019

Formatting Sample

ID	Name	Table Name	Alias	Created By	Created On	Modified By	Modified On	Datasource	Owner ID	Owner Type	Version	Datasource ID	Alias	DATASOURCE ID	DESCRIPTION	ID	LEGACYREFERENCE	NAME	OWNER REPID	Owner ID	Owner Type	Table Name	Version
123456	Name	Table Name	Alias	Created By	Mar 26, 2019	Modified By	Mar 26, 2019	Datasource	Owner ID	Owner Type	123456	123456	Alias	123456	DESCRIPTION	123456	LEGACYREFERENCE	NAME	123456	Owner ID	Owner Type	Table Name	123456
123456	Name	Table Name	Alias	Created By	Mar 26, 2019	Modified By	Mar 26, 2019	Datasource	Owner ID	Owner Type	123456	123456	Alias	123456	DESCRIPTION	123456	LEGACYREFERENCE	NAME	123456	Owner ID	Owner Type	Table Name	123456
123456	Name	Table Name	Alias	Created By	Mar 26, 2019	Modified By	Mar 26, 2019	Datasource	Owner ID	Owner Type	123456	123456	Alias	123456	DESCRIPTION	123456	LEGACYREFERENCE	NAME	123456	Owner ID	Owner Type	Table Name	123456
123456	Name	Table Name	Alias	Created By	Mar 26, 2019	Modified By	Mar 26, 2019	Datasource	Owner ID	Owner Type	123456	123456	Alias	123456	DESCRIPTION	123456	LEGACYREFERENCE	NAME	123456	Owner ID	Owner Type	Table Name	123456
123456	Name	Table Name	Alias	Created By	Mar 26, 2019	Modified By	Mar 26, 2019	Datasource	Owner ID	Owner Type	123456	123456	Alias	123456	DESCRIPTION	123456	LEGACYREFERENCE	NAME	123456	Owner ID	Owner Type	Table Name	123456

Informer 5 Ad Hoc Query

View

Mapping

Informer PostgreSQL > MAPPING

Fields

ID, Name, Table Name, Alias, Created By, Created On, Modified By, Modified On, Datasource, Owner ID, Owner Type, Version, Datasource ID, Alias, DATASOURCE ID, DESCRIPTION, ID, LEGACYREFERENCE, NAME, OWNER REPID, Owner ID, Owner Type, Table Name, Version

Aggregate Fields

None

Criteria

Created On on or after 1/1/2019

Aggregate Criteria

None

Inputs

None

Flow Steps

None

Jobs

With Informer 5 Jobs you can:

- Perform multiple actions in one job
- Attach multiple Ad hoc Queries/Datasets results to one email
- Use aggregates in email body
- Transfer files using SFTP
- Choose not to attach any result set

Informer 4 Schedule

Report Schedule
Schedule a report to run at regular intervals

Report: Informer Mappings REL

Scheduled by: System Administrator

Schedule

Archive

Email

Export

Description *

Informer Mappings REL

Date Range

3/18/19

-

No end date

Start Time *

12:27:50 PM

Recurrence *

Once

Daily

Weekly

☒ Monthly

Yearly

Custom

Day 18 of every 1 month(s)

The third Monday of every 1 month(s)

Disable

☐

Save

Run Now

Delete

Cancel

Informer 5 Job

Job

Run Informer Mappings REL

No description

Schedule

Automatically run the job on a recurring schedule

☒

When

Day 18 of every 1/1 months at 9:35 AM. Next run time is Thu, April 18, 2019 at 09:35 AM EDT

Time zone: America/Port-au-Prince

This time zone will affect formatting, filters, and aggregations of dates in the output generated by this job.

Data

Informer Mappings REL

informerMappingsRel

☒

Actions

Send an email

To: regina@entrinsik.com

Attachments: None