

BUILDING RESILIENCE THROUGH
DATA INSIGHTS:
A HANDS-ON INFORMER 5 WORKSHOP

Lindsey Tedder and Laura Boyles



AGENDA



- Introduction to Facilitators
- Tour of Informer 5
- Dashboard Creation from Provided IPEDS File
- Dashboard Creation from Participant's IPEDS File
- Show and Tell: Pulling Colleague Data into an Informer 5 Dashboard
- Questions



PRESENTERS

Lindsey Tedder



Laura Boyles



TOUR OF INFORMER 5



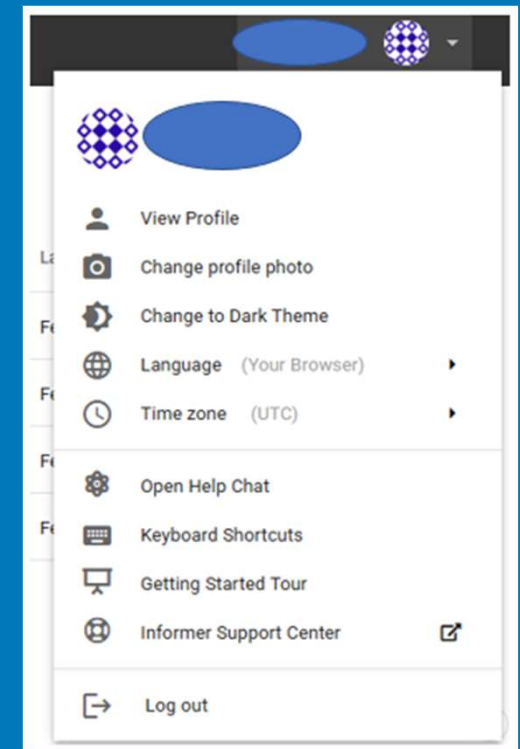
PROFILE DROP DOWN

Helpful Resources at the Bottom:

- Getting Started Tour – great for new to Informer 5
- Open Help Chat (*not enabled at CCCC*)
- Informer Support Center (*see next slide*)
- Keyboard Shortcuts

Top:

- View Profile – make sure has correct time zone!
- Can add profile picture & change to dark/light theme
- Language & Time Zone (*change in profile!*)





Informer 5 Support Center

Search



Promoted articles

What are Informer Assistants?

Connecting to Informer via OAuth Client Apps

End of Support for Microsoft SQL Server 2012 and Earlier

End of Support for PostgreSQL 11

Migrating from PostgreSQL 11 to PostgreSQL 16 (Linux w/ Docker)

Migrating from PostgreSQL 11 to PostgreSQL 16 (Windows)



Home

Diving in to Informer 5



Assistants

AI Assistants in Informer



Reports

Visualizing data in a Report



Datasets

Managing your indexed data



Queries

Building and Interacting with Ad hoc and Dataset Queries



Datasources

Connect to your data, wherever it resides



Jobs

Configure and schedule tasks to run on your data



Teams and Users

Collaborate to build, share, and secure



Administration

Site-wide settings, resources, and performance metrics



Server Management

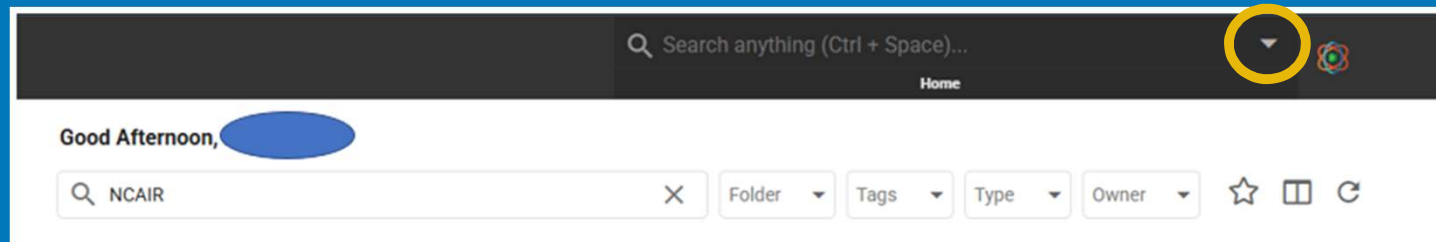


FAQs & Migration



Education and Training

TOP SEARCH VS SEARCH IN BODY OF PAGE



Top Search *(in black field)*

Best use:

- if want to quickly find something you have been working on recently
- Click on down arrow *(circled in yellow)* – in order starting from most recent

Search in Body of the Page *(where NCAIR is typed)*

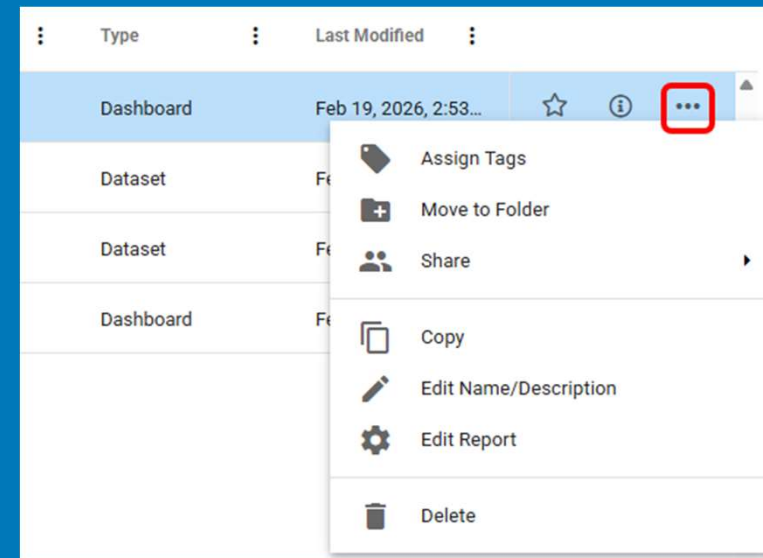
- Like most as type begins to narrow list
- Can limit by Owner, Type *(most used)*
- If use Folders or Tags, also use to limit search

CURRENT ITEMS (BODY)

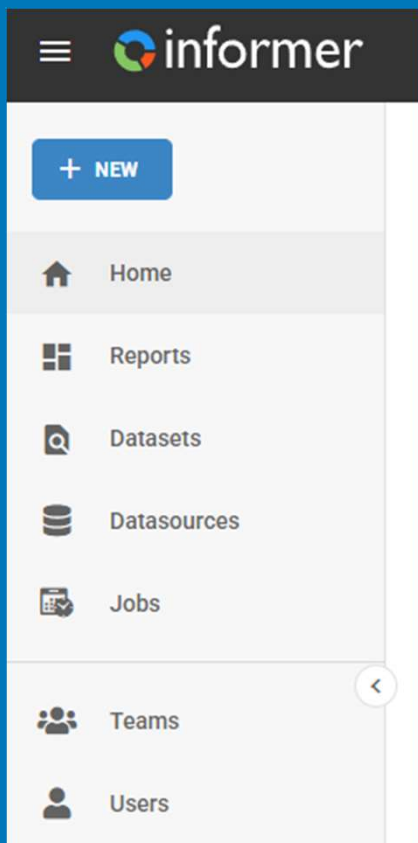
Click on Column Headers to sort by that column (can do same under vertical ellipses)

Individual Item Information

- Type and when Last Modified provided
- Other options:
 - **Star** – use this to identify favorites. Can click on star in body search section to show only favorites
 - **(i) information** – provides quick overview of item
 - **Horizontal ellipsis (...)** – click on this to
 - **Assign Tags & Move to Folder**
 - **Share with others**
 - ****Copy**** (use this frequently if need similar but don't want to change current item)
 - **Edit the Name/Description**
 - **Edit Report** – typically do this after have entered into item
 - **Delete** an item no longer needed



LEFT NAVIGATION



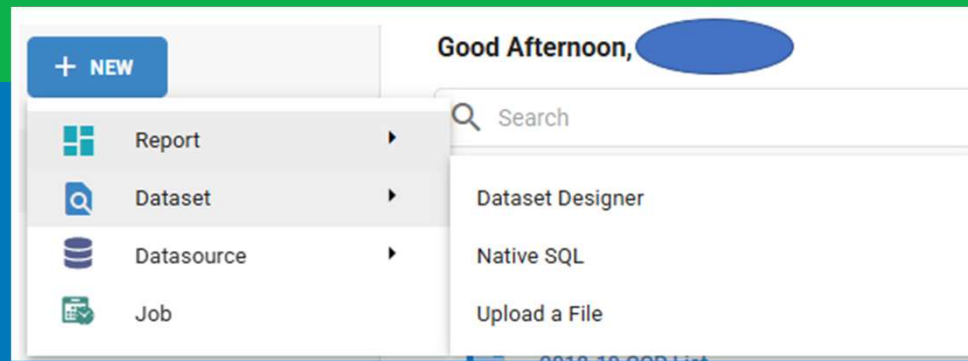
Top

- **Home**: includes all items
- **Reports**:
 - Dashboards,
 - Ad Hoc Queries,
 - Comparison Boards, etc.
- **Datasets**:
 - Constructed from CIS/SIS,
 - Uploaded data files
- **Datasources**: pre-identified assigned data sources
- **Jobs**: scheduled runs of reports

Bottom

- **Teams**: list of all Teams at college (to see your Teams go to Profile)
- **Users**: list of all users at college

+ NEW BUTTON – ADD A NEW ITEM



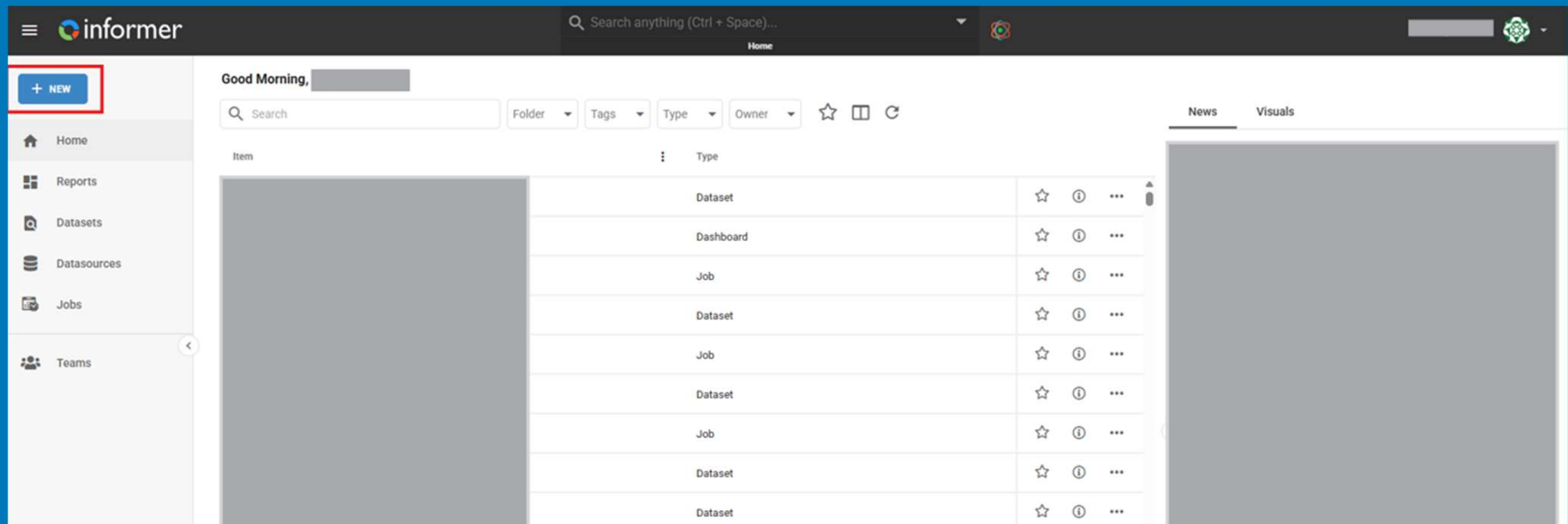
- Report
 - Interactive:
 - **Dashboard**,
 - Comparison Board,
 - Data View
 - Ad Hoc Query:
 - Native SQL,
 - Query Designer
- Dataset
 - Dataset Designer,
 - Native SQL,
 - **Upload a File**
- Datasource – check with IT dept
- Job (may or may not have this)

DASHBOARD CREATION FROM PROVIDED IPEDS FILE



UPLOAD A DATASET (1/4)

- Open Informer 5
- Click “New” in the upper left hand corner

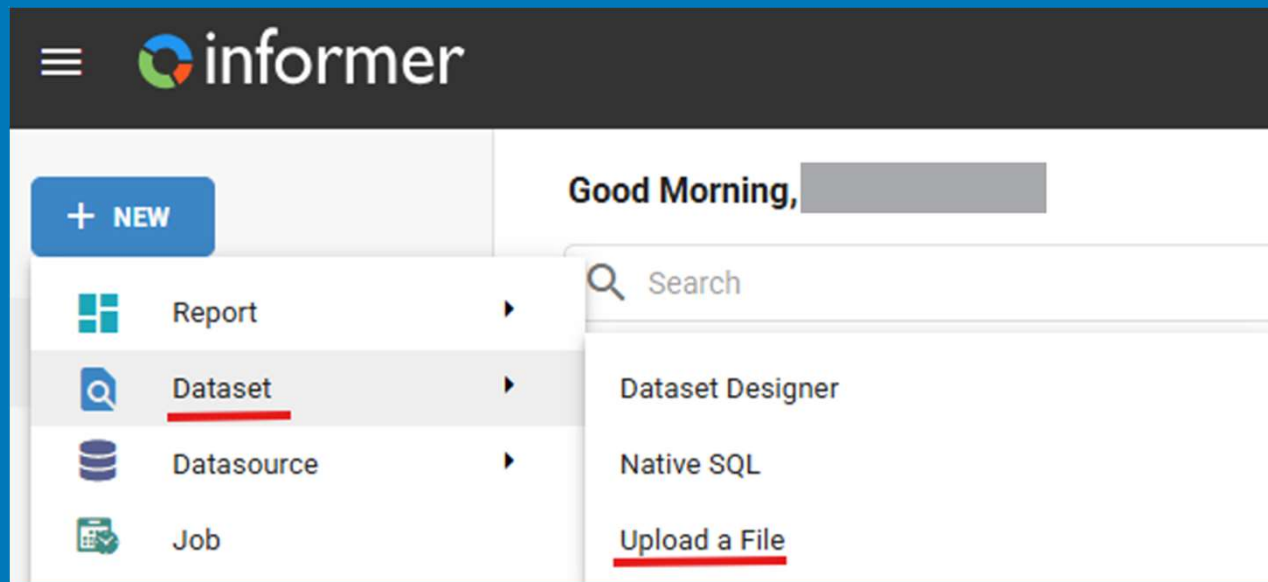


The screenshot shows the Informer 5 dashboard interface. The top navigation bar includes the Informer logo, a search bar, and user profile information. The left sidebar contains a navigation menu with a '+ NEW' button highlighted by a red box. The main content area displays a list of items with columns for 'Item', 'Type', and actions (star, info, and more options). The items listed are Dataset, Dashboard, Job, Dataset, Job, Dataset, Job, Dataset, and Dataset. The right sidebar is currently empty, with tabs for 'News' and 'Visuals' visible at the top.

Item	Type	Actions
	Dataset	☆ ⓘ ⋮
	Dashboard	☆ ⓘ ⋮
	Job	☆ ⓘ ⋮
	Dataset	☆ ⓘ ⋮
	Job	☆ ⓘ ⋮
	Dataset	☆ ⓘ ⋮
	Job	☆ ⓘ ⋮
	Dataset	☆ ⓘ ⋮
	Job	☆ ⓘ ⋮
	Dataset	☆ ⓘ ⋮

UPLOAD A DATASET (2/4)

- Hover over or click “Dataset”
- In the popup to the right, click “Upload a File”




UPLOAD A DATASET (3/4)

- Select a file from your computer or drag and drop the file

Upload a File

Create a Dataset from a File containing data, such as an Excel Spreadsheet



CHOOSE FILE

You can also drag and drop your file here


CANCEL **SAVE**


UPLOAD A DATASET (4/4)

- Once you have selected your file, you will have the option to change the name of the dataset or the sheet within the file.
 - Automatically, the dataset will have the same name as the file, but you can modify it.
 - The first sheet in the file will be selected, but you can adjust that also.
- Select “Save”
 - The dataset will open

Upload a File

Create a Dataset from a File containing data, such as an Excel Spreadsheet



 **NCAIR NCCCS IPEDS Retention Rates With Dates.xlsx** 17.5 kB [CHANGE FILE](#)

Name *

NCAIR NCCCS IPEDS Retention Rates With Dates

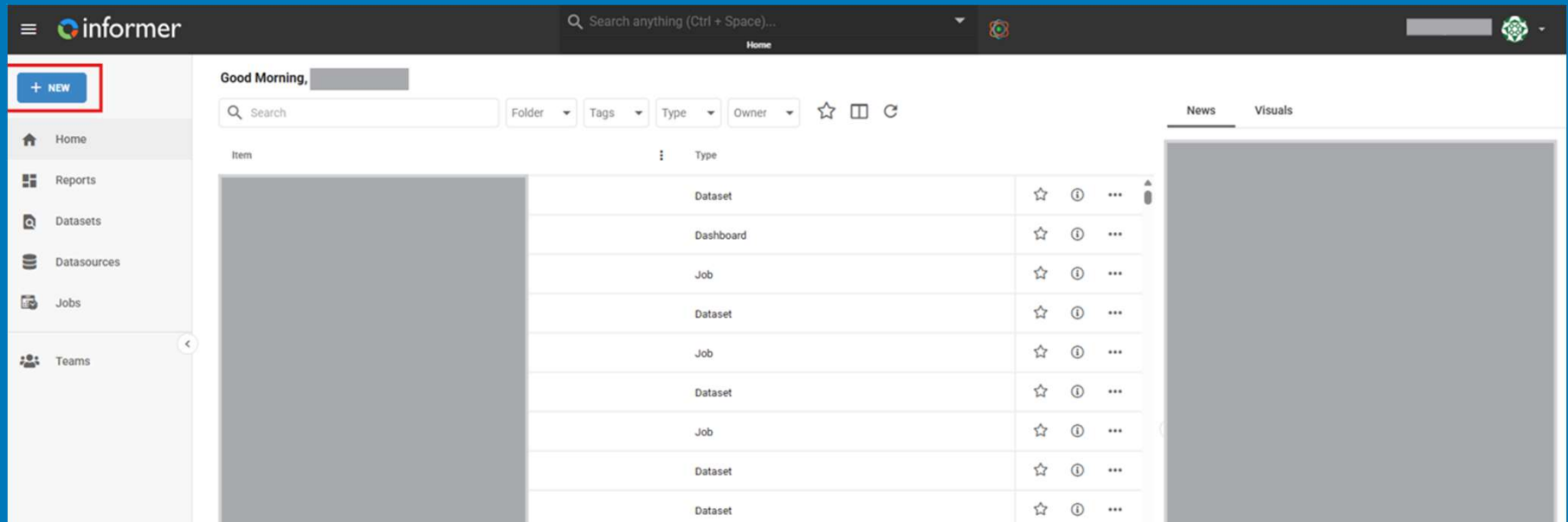
Sheet Name

NCAIR NCCCS IPEDS Retention Rat

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

CREATING A DASHBOARD (1/3)

- Click “New” in the upper left hand corner

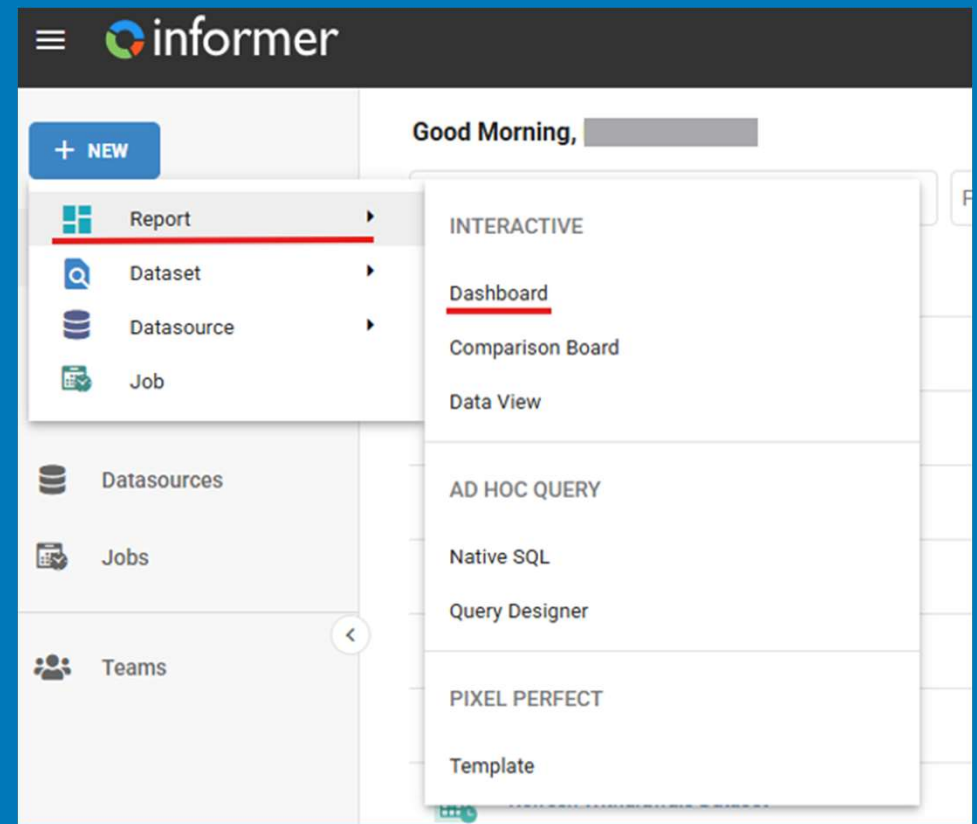


The screenshot shows the Informer dashboard interface. The top navigation bar includes the Informer logo, a search bar, and a user profile. The left sidebar contains navigation options: Home, Reports, Datasets, Datasources, Jobs, and Teams. The main content area displays a list of items with columns for Item, Type, and actions (star, info, and more options). The 'NEW' button in the top-left corner of the sidebar is highlighted with a red box.

Item	Type	Actions
	Dataset	☆ ⓘ ...
	Dashboard	☆ ⓘ ...
	Job	☆ ⓘ ...
	Dataset	☆ ⓘ ...
	Job	☆ ⓘ ...
	Dataset	☆ ⓘ ...
	Job	☆ ⓘ ...
	Dataset	☆ ⓘ ...
	Job	☆ ⓘ ...
	Dataset	☆ ⓘ ...

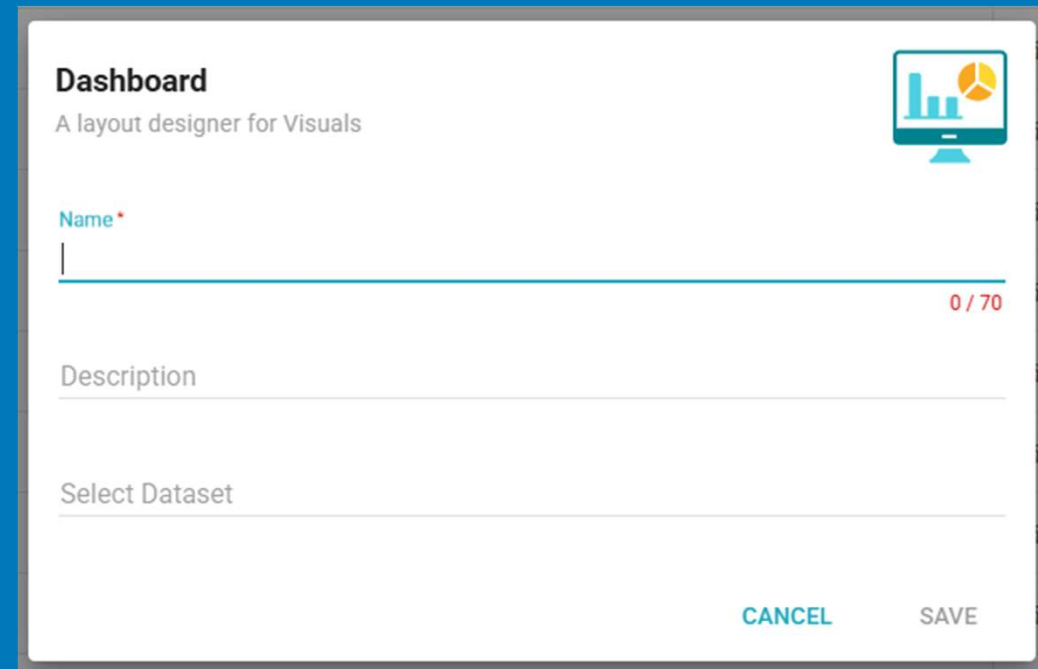
CREATING A DASHBOARD (2/3)

- Hover over or click “Report”
- In the popup to the right, click “Dashboard”




CREATING A DASHBOARD (3/3)

- Enter . . .
 - Dashboard Name (required)
 - Description (optional)
- Adding a dataset at this step is also optional
 - I like to add one as a starting point
- Click “Save”
 - The dashboard will open



Dashboard
A layout designer for Visuals



Name *
| _____ 0 / 70

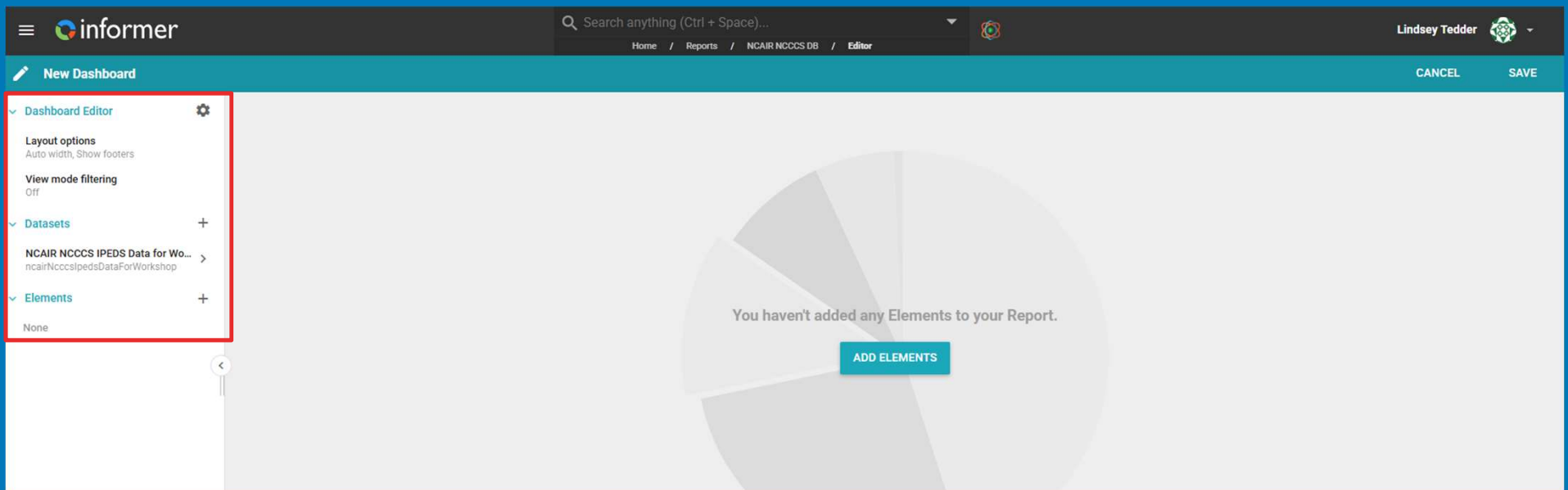
Description
| _____

Select Dataset
| _____

CANCEL SAVE

MENU (1/1)

- There will be a menu on the left side of the screen that you will use to create your dashboard



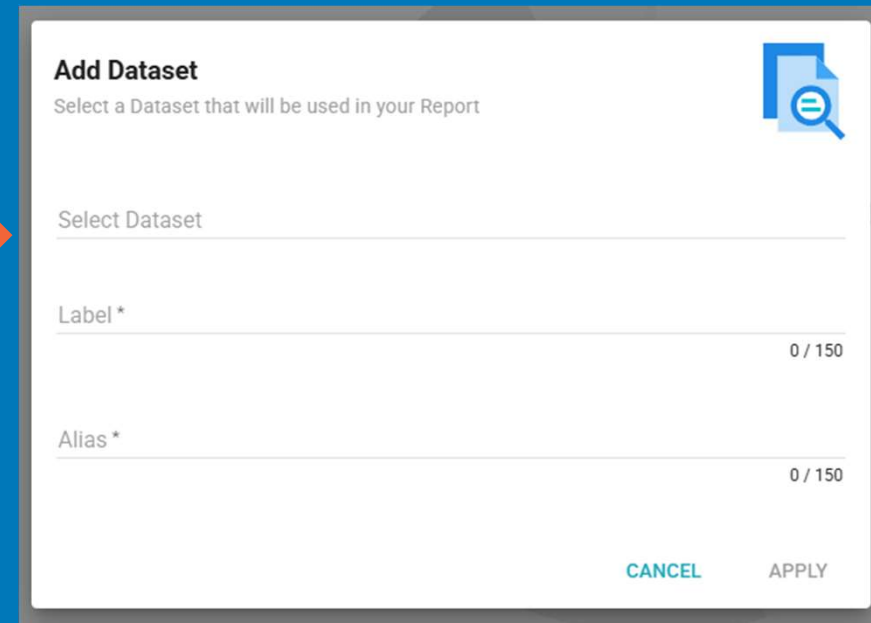
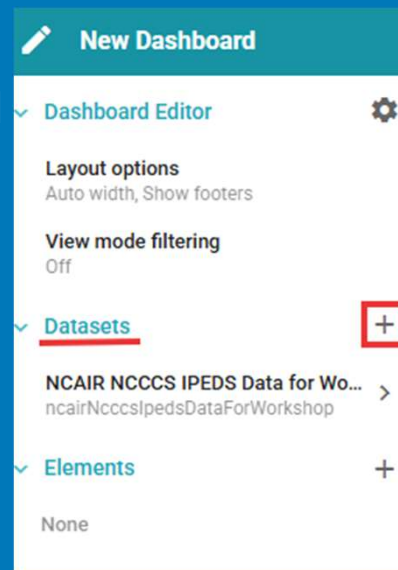
The screenshot shows the Informer dashboard editor interface. At the top, there is a navigation bar with the Informer logo, a search bar, and the user name "Lindsey Tedder". Below the navigation bar, there is a teal header with "New Dashboard" and "CANCEL" and "SAVE" buttons. On the left side, there is a menu with the following sections:

- Dashboard Editor** (with a gear icon)
 - Layout options**: Auto width, Show footers
 - View mode filtering**: Off
- Datasets** (with a plus icon)
 - NCAIR NCCCS IPEDS Data for Wo... (with a right arrow icon)
- Elements** (with a plus icon)
 - None

The main area of the dashboard is a light gray background with a large, faint pie chart graphic. In the center of the chart, there is a message: "You haven't added any Elements to your Report." Below this message is a teal button labeled "ADD ELEMENTS".

ADD ADDITIONAL DATASET(S) (1/1)

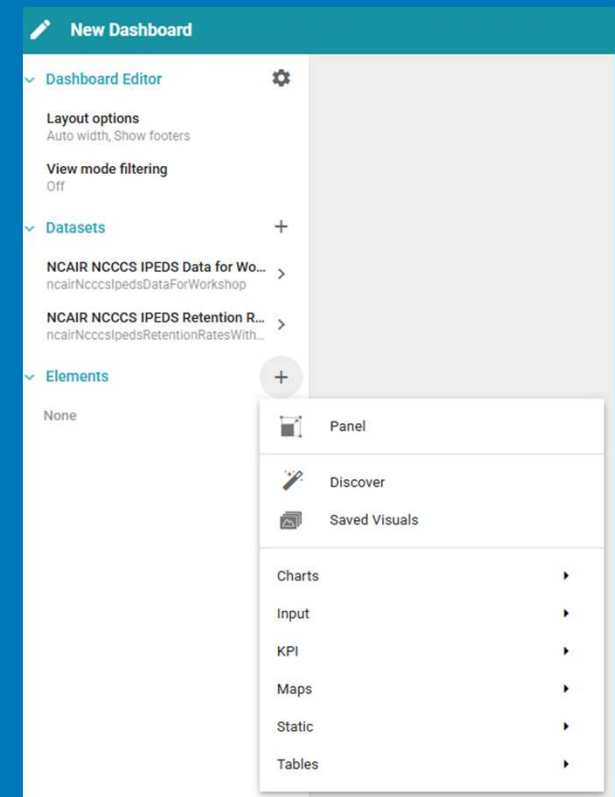
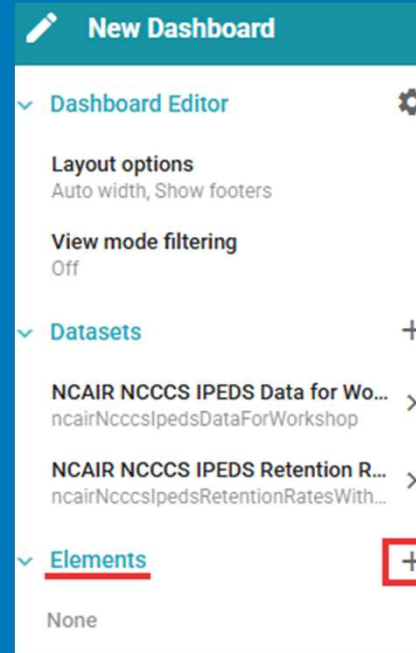
- Within the menu, select “+” to the right of “Datasets”
 - Select the dataset you would like to include in the dashboard
- Click “Apply”



The 'Add Dataset' dialog box is shown. It has a title bar with a search icon. The main content area contains the text 'Select a Dataset that will be used in your Report'. Below this, there are three input fields: 'Select Dataset', 'Label *', and 'Alias *'. The 'Label *' and 'Alias *' fields have a character count of '0 / 150'. At the bottom right, there are two buttons: 'CANCEL' and 'APPLY'.

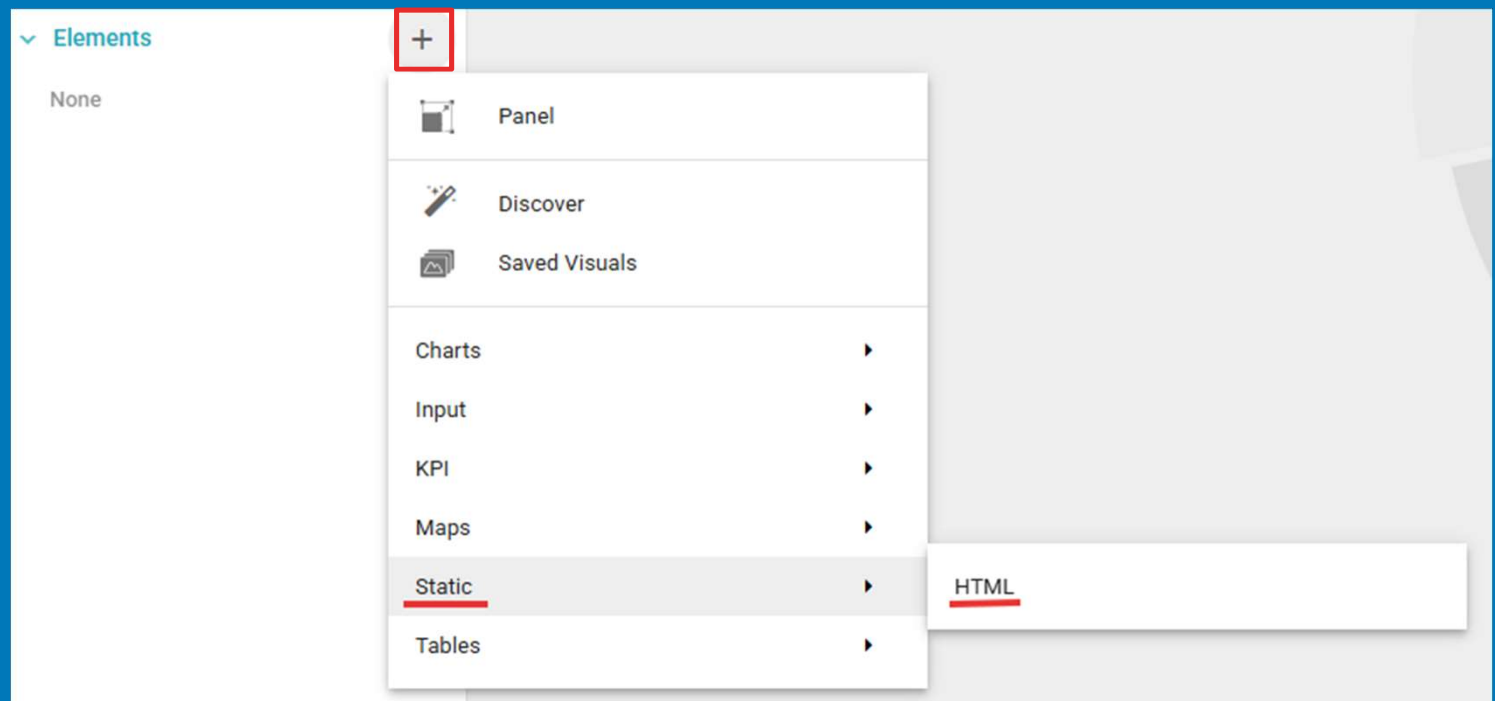
ADDING ELEMENTS (1/1)

- Within the menu, select “+” to the right of “Elements”
 - Select the element type you would like to include in the dashboard
 - Select additional criteria for the element



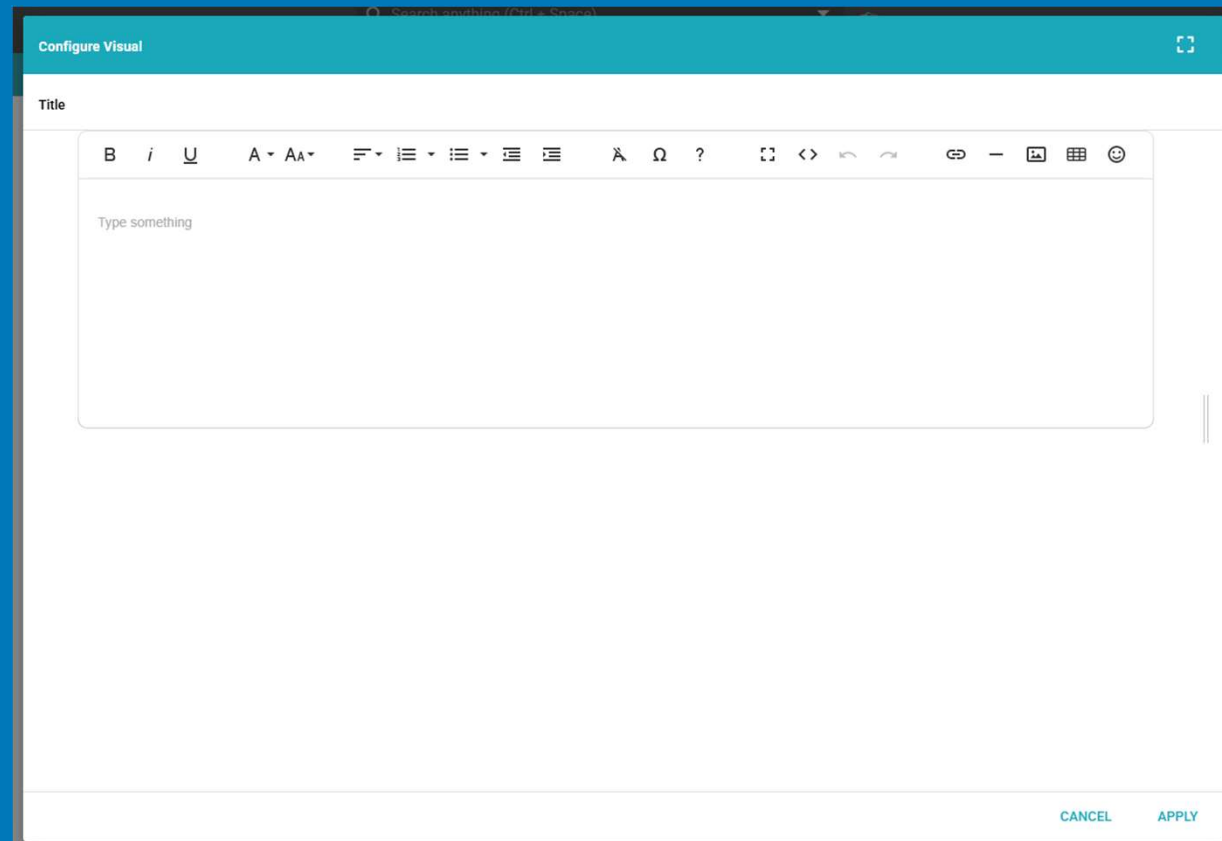
CREATE A HEADER (1/3)

- Within the menu, select “+” to the right of Elements
 - Select “Static”
 - Select “HTML”



CREATE A HEADER (2/3)

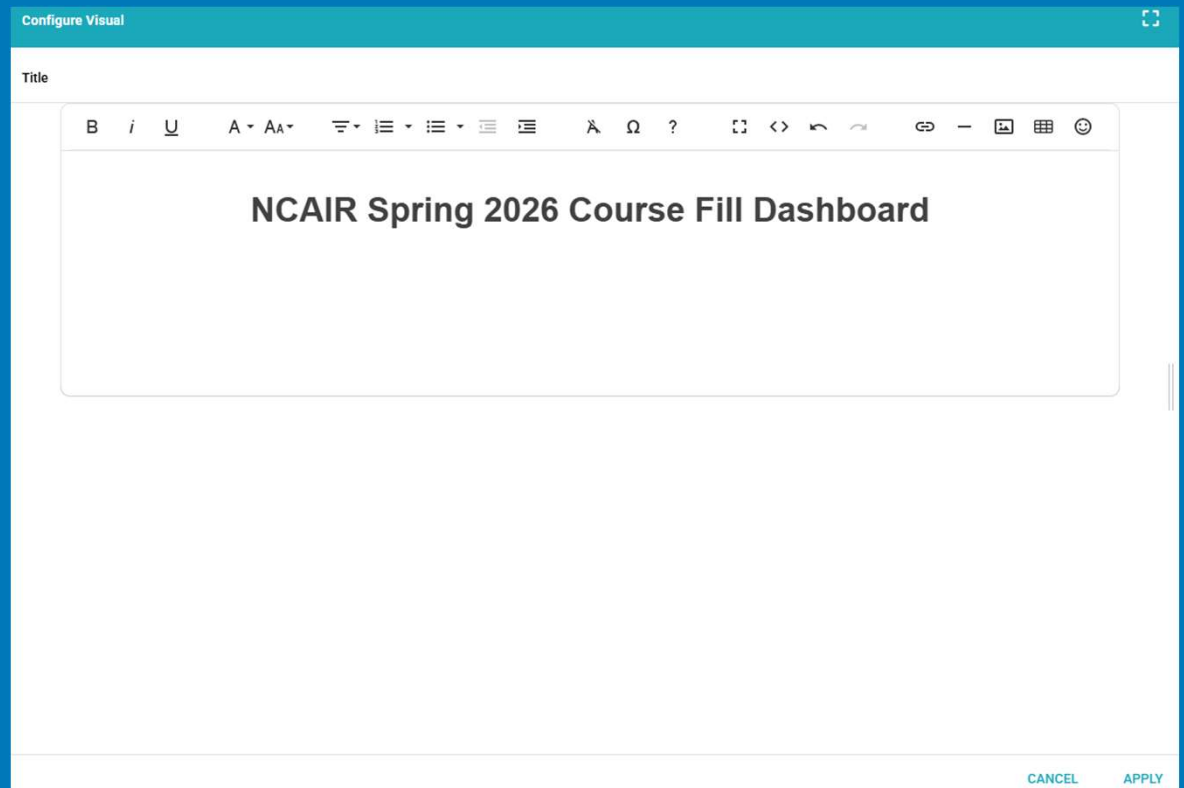
- The Configure Visual popup will appear
- Type header details
 - “NCAIR Spring 2026 Course Fill Dashboard”



CREATE A HEADER (3/3)

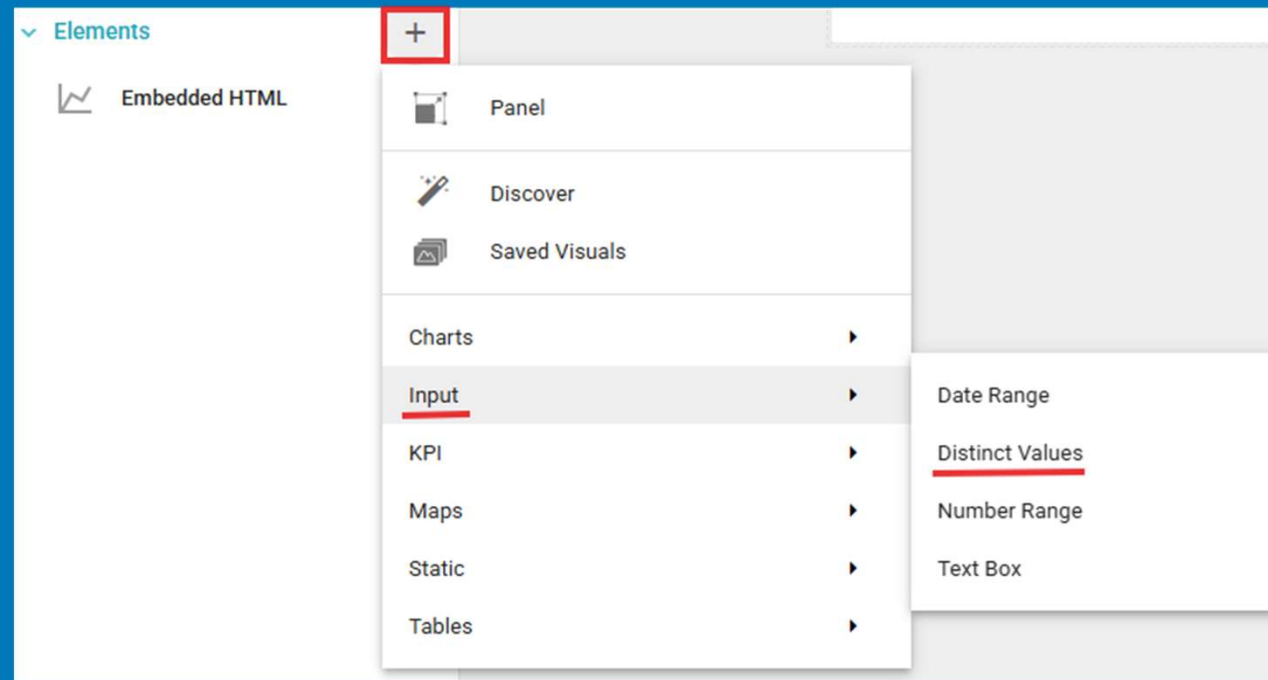


- Adjust text as needed
 - Bold
 - Font
 - Size
- Select “Apply”
- Adjust header size



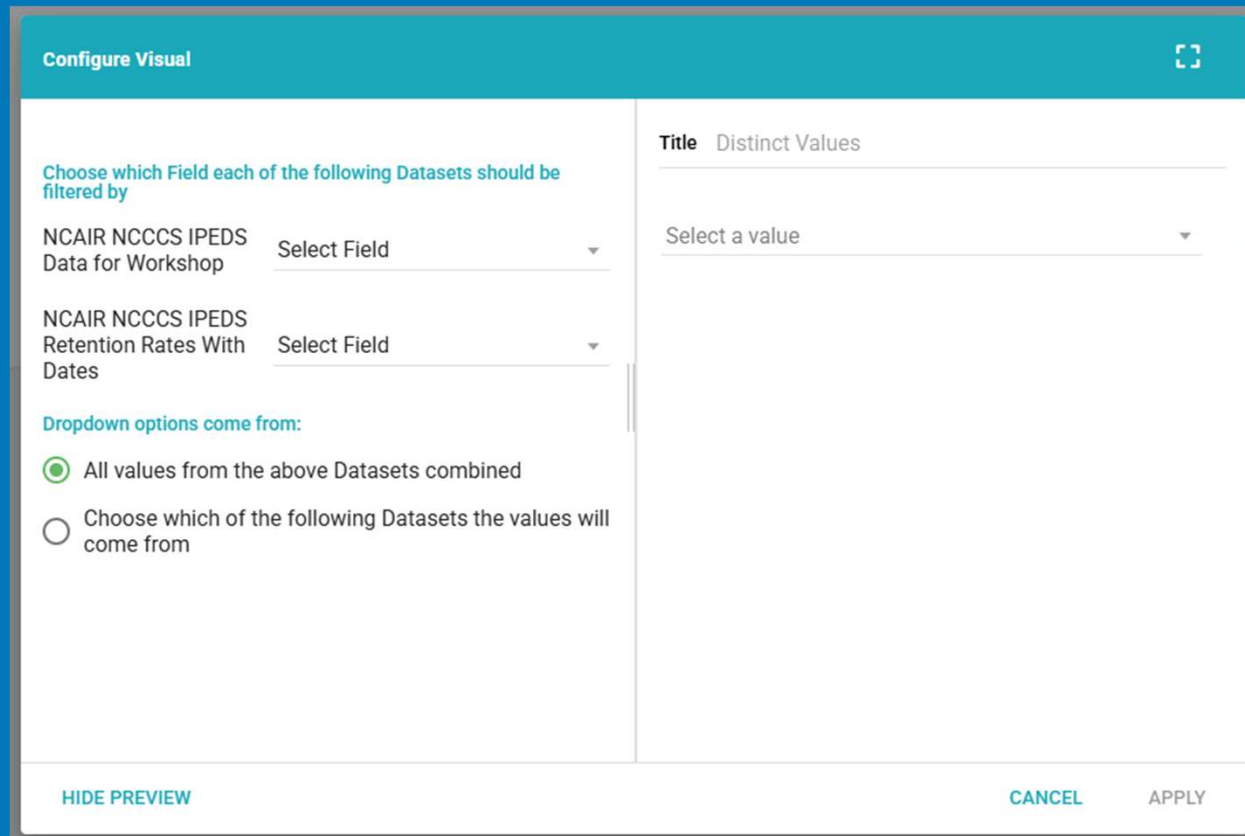
ADD A FILTER (1/7)

- Within the menu, select “+” to the right of “Elements”
 - Select “Input”
 - Select “Distinct Values”



ADD A FILTER (2/7)

- The Configure Visual popup will appear
- Select the field from each dataset you want to filter
 - In this case we want to filter the entire dashboard, so we will select filters from both datasets



Configure Visual

Choose which Field each of the following Datasets should be filtered by

NCAIR NCCCS IPEDS Data for Workshop Select Field

NCAIR NCCCS IPEDS Retention Rates With Dates Select Field

Dropdown options come from:

All values from the above Datasets combined

Choose which of the following Datasets the values will come from

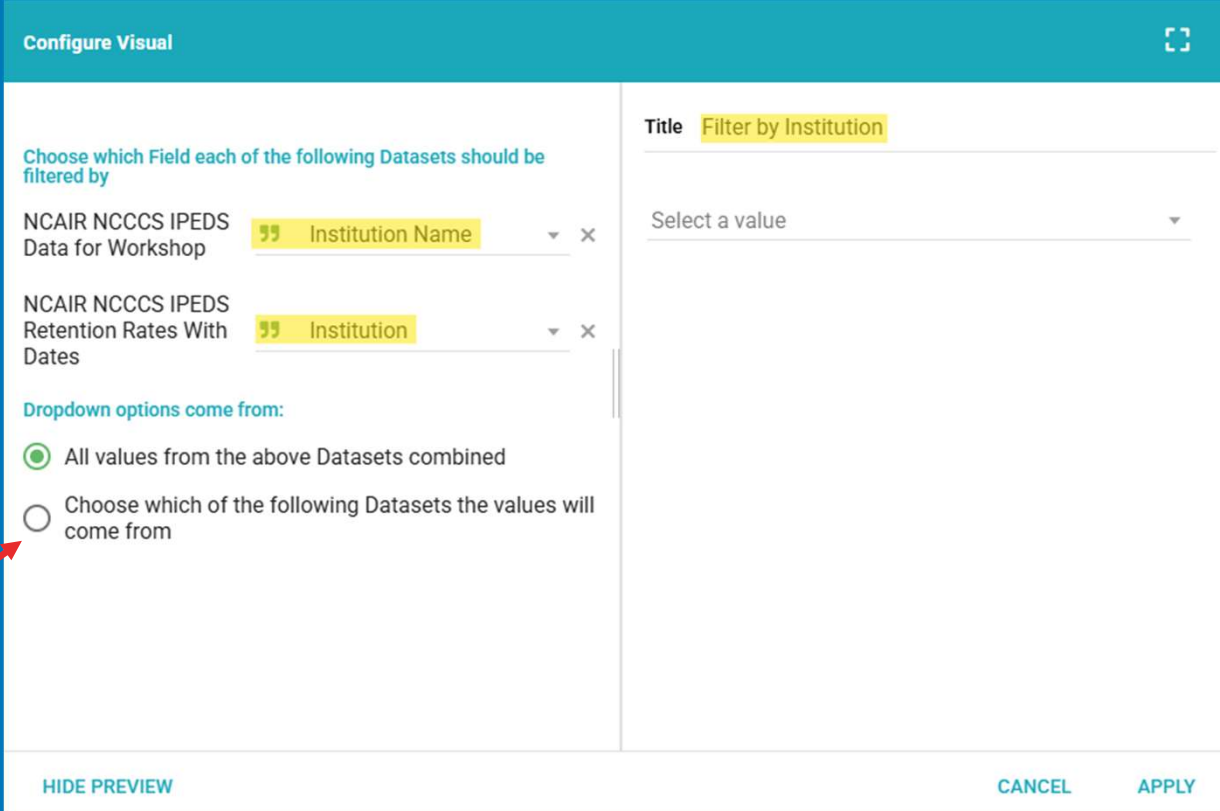
Title Distinct Values

Select a value

HIDE PREVIEW CANCEL APPLY

ADD A FILTER (3/7)

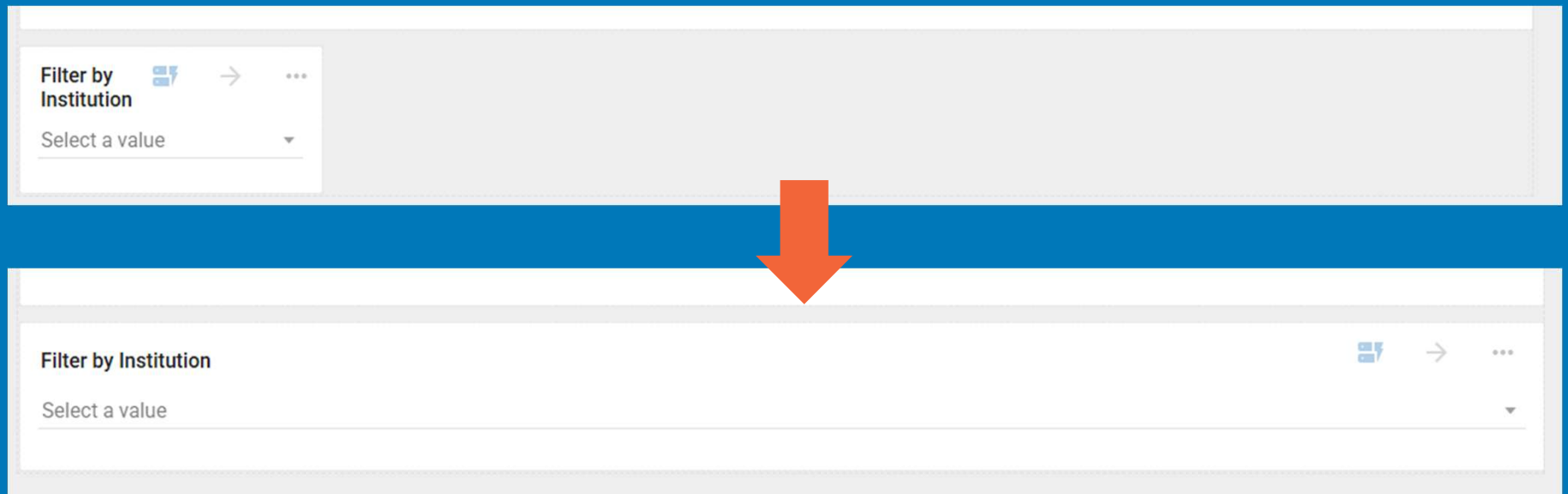
- Select “Institution Name” for NCAIR NCCCS IPEDS Data for Workshop
- Select “Institution” for NCAIR NCCCS IPEDS Retention Rates with Dates
- Also add a title for your filter
- Select “Apply”
- If you were only filtering one field from one dataset, I would change the dropdown option



The screenshot shows the 'Configure Visual' dialog box. On the left, under the heading 'Choose which Field each of the following Datasets should be filtered by', two datasets are listed: 'NCAIR NCCCS IPEDS Data for Workshop' with 'Institution Name' selected, and 'NCAIR NCCCS IPEDS Retention Rates With Dates' with 'Institution' selected. Below this, under 'Dropdown options come from:', there are two radio button options: 'All values from the above Datasets combined' (which is selected) and 'Choose which of the following Datasets the values will come from'. A red arrow points to the second radio button. On the right side of the dialog, the 'Title' is set to 'Filter by Institution' and there is a dropdown menu labeled 'Select a value'. At the bottom, there are buttons for 'HIDE PREVIEW', 'CANCEL', and 'APPLY'.

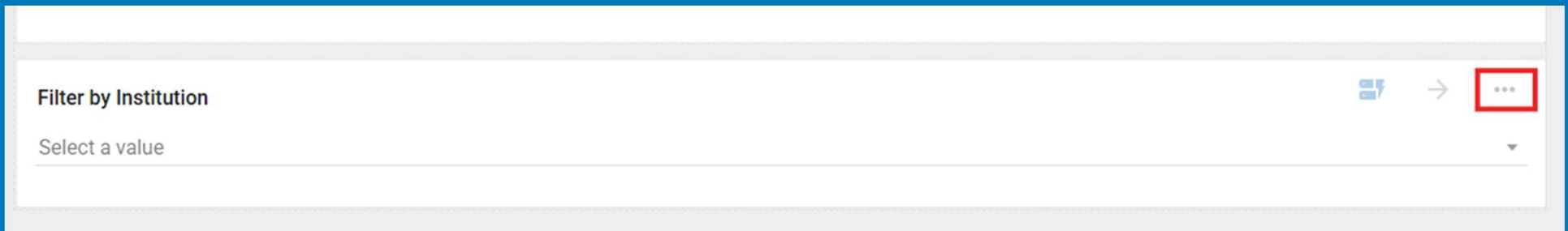
ADD A FILTER (4/7)

- Extend your filter to be the width of the dashboard

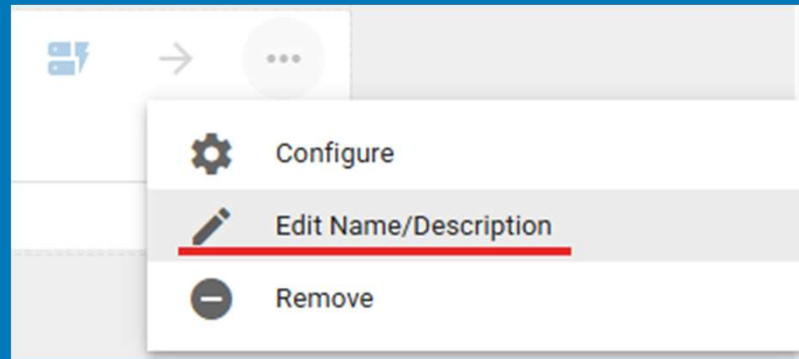


ADD A FILTER (5/7)

- Click the ellipsis (. . .) at the top right of the filter element to add a description



- Click "Edit Name/Description"



ADD A FILTER (6/7)



- Add filter options in the description
- Select “Apply”

Rename

Name
Filter by Institution 21 / 255

Description
EX: Alamance CC, Central Carolina CC, Sandhills CC, Wake Tech 70 / 255

[CANCEL](#) [APPLY](#)

ADD A FILTER (7/7)



- Your filter should look like this

Filter by Institution

EX: Alamance CC, Central Carolina CC, Sandhills CC, Wake Tech CC, etc.

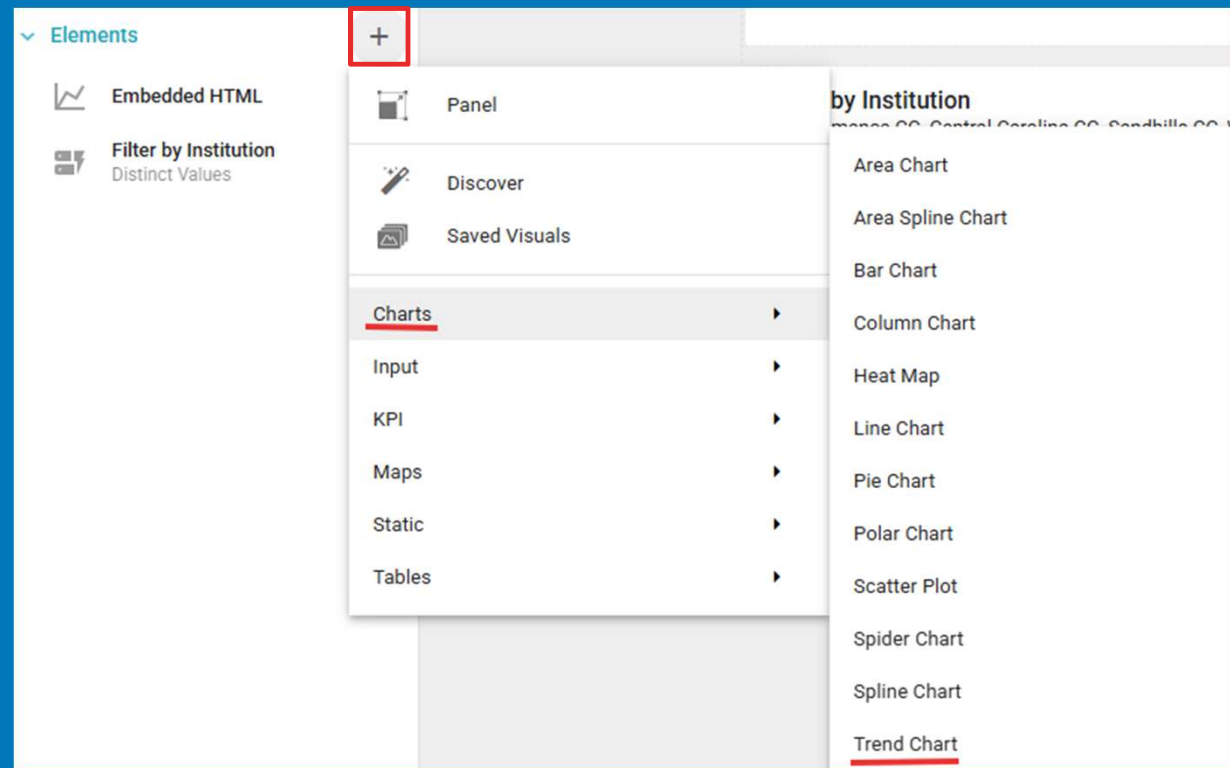


Select a value



ADD A TREND CHART (1/10)

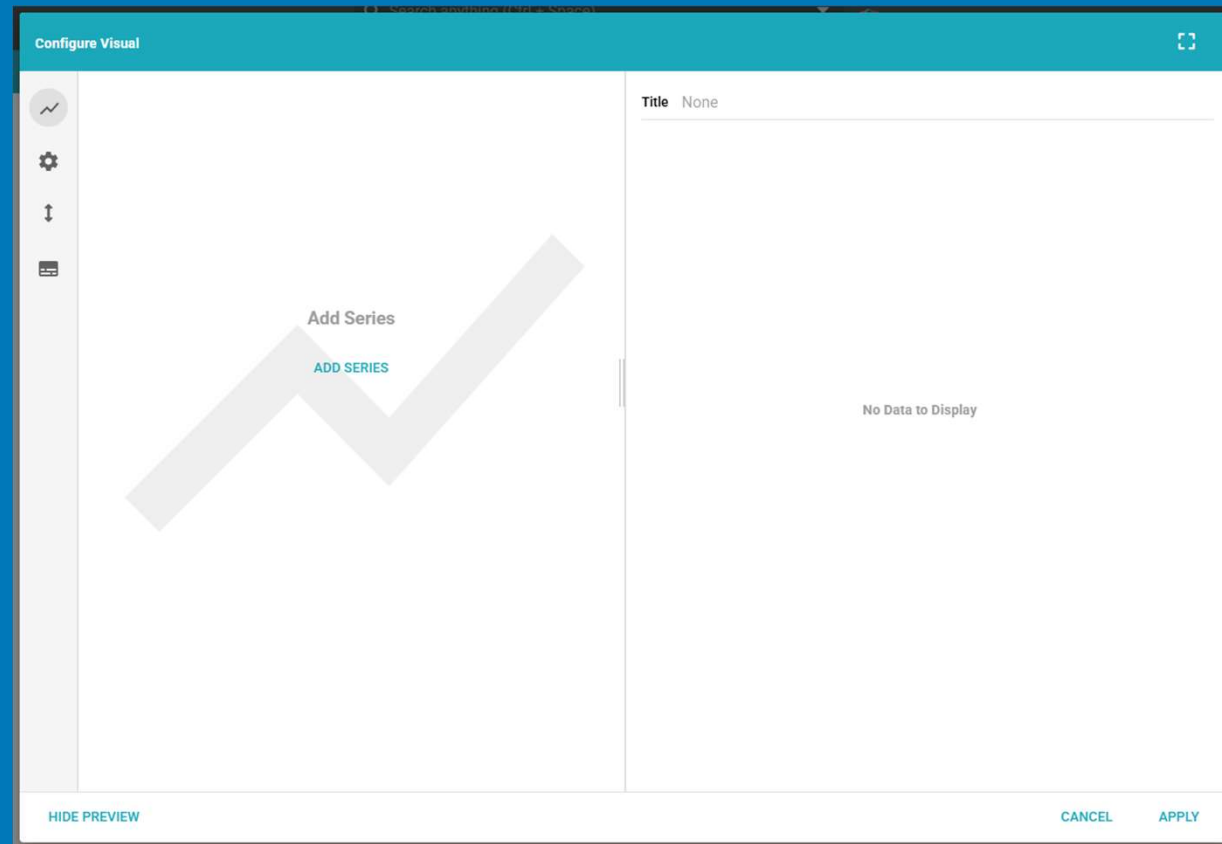
- Within the menu, select “+” to the right of “Elements”
 - Select “Charts”
 - Select “Trend Chart”



The screenshot shows a dashboard interface with a menu on the left and a main content area on the right. The menu is titled "Elements" and contains several items: "Embedded HTML", "Filter by Institution" (with a sub-item "Distinct Values"), "Charts", "Input", "KPI", "Maps", "Static", and "Tables". A red box highlights a "+" icon to the right of the "Elements" header. A dropdown menu is open, showing options: "Panel", "Discover", "Saved Visuals", "Charts" (highlighted with a red underline), "Input", "KPI", "Maps", "Static", and "Tables". The "Charts" dropdown is further expanded, showing a list of chart types: "Area Chart", "Area Spline Chart", "Bar Chart", "Column Chart", "Heat Map", "Line Chart", "Pie Chart", "Polar Chart", "Scatter Plot", "Spider Chart", "Spline Chart", and "Trend Chart" (highlighted with a red underline).

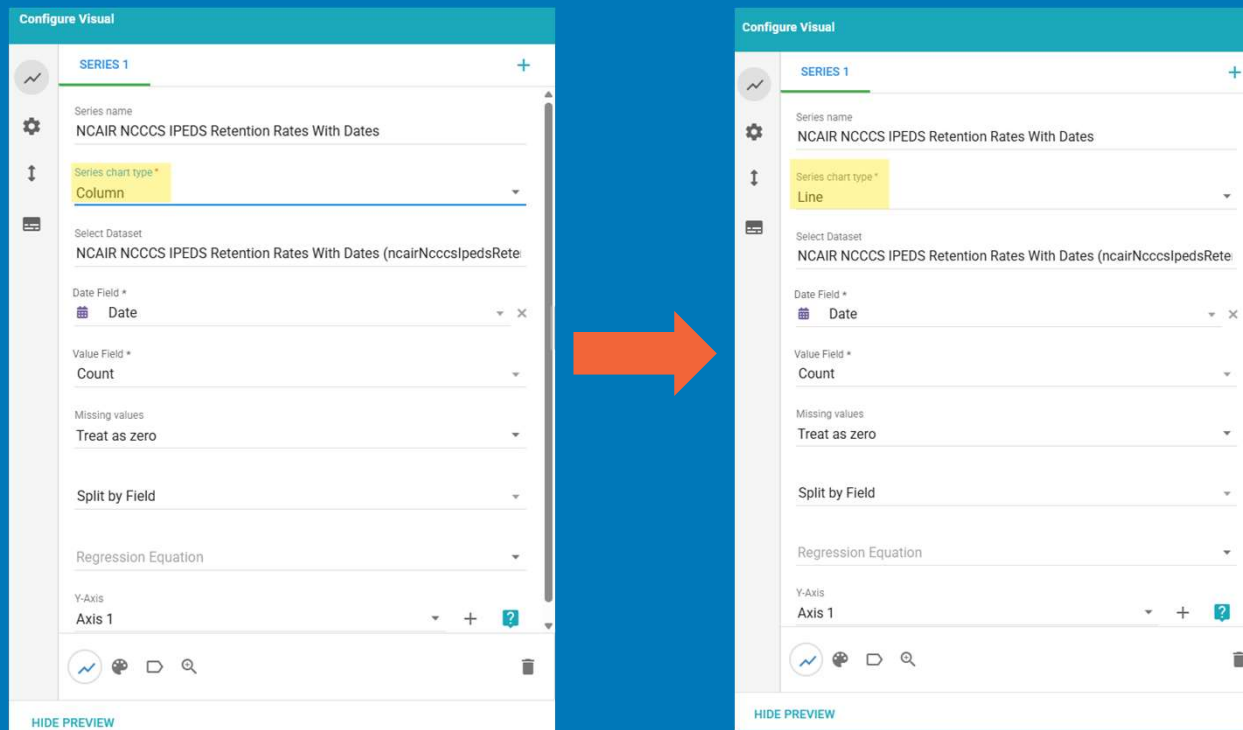
ADD A TREND CHART (2/10)

- The Configure Visual popup will appear
- Click “Add Series”
 - Enter the dataset you want:
NCAIR NCCCS IPEDS Retention Rates with Dates



ADD A TREND CHART (3/10)

- Change the “Series chart type” from “Column” to “Line”



The image displays two side-by-side screenshots of the 'Configure Visual' interface, illustrating the process of changing the chart type. An orange arrow points from the left screenshot to the right one.

Left Screenshot: The 'Series chart type' dropdown menu is open, and 'Column' is selected. The series name is 'NCAIR NCCCS IPEDS Retention Rates With Dates', the dataset is 'NCAIR NCCCS IPEDS Retention Rates With Dates (ncairNcccsIpedeRete)', the date field is 'Date', and the value field is 'Count'. The Y-axis is labeled 'Axis 1'.

Right Screenshot: The 'Series chart type' dropdown menu is open, and 'Line' is selected. All other configuration options remain the same as in the left screenshot.

ADD A TREND CHART (4/10)



- Change the “Value Field” from “Count” to “Average Retention Rate”
 - Click “Count”
 - All field options will popup
 - Click the “>” to the left of “Retention Rate” to show all number options
 - Select “Average”

- Photos in next slide

ADD A TREND CHART (5/10)

Configure Visual

SERIES 1

Series name
NCAIR NCCCS IPEDS Retention Rates With Dates

Series chart type*
Line

Select Dataset
NCAIR NCCCS IPEDS Retention Rates With Dates (ncairNcccsIpedeRete

Date Field*
Date

Value Field*
Count

Missing values
Treat as zero

Split by Field

Regression Equation

Y-Axis
Axis 1

HIDE PREVIEW

FIELD CUSTOM

Search Fields

All Text Number

Date (4)

Enrollment Status (2)

Institution (2)

Retention Rate (6)

Overall Count

FIELD CUSTOM

Search Fields

All Text Number Date

Uate (4)

Enrollment Status (2)

Institution (2)

Retention Rate (6)

Average

Count

Count Distinct

Maximum

Minimum

Sum

Overall Count

Configure Visual

SERIES 1

Series name
NCAIR NCCCS IPEDS Retention Rates With Dates

Series chart type*
Line

Select Dataset
NCAIR NCCCS IPEDS Retention Rates With Dates (ncairNcccsIpedeRete

Date Field*
Date

Value Field*
Average Retention Rate

Missing values
Treat as zero

Split by Field

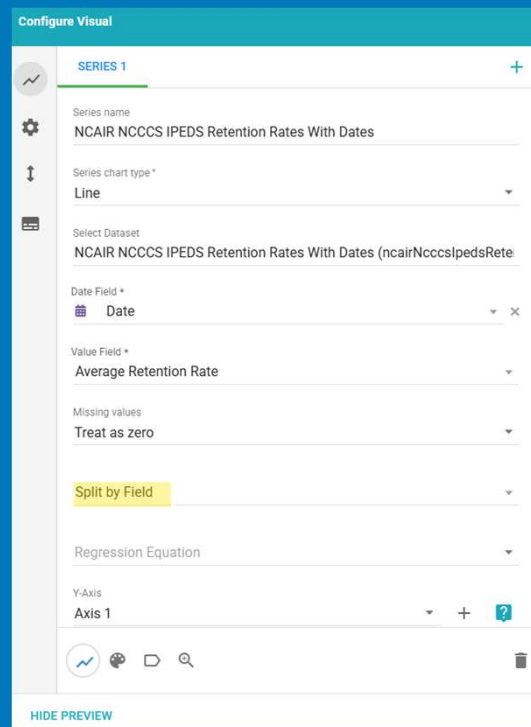
Regression Equation

Y-Axis
Axis 1

HIDE PREVIEW

ADD A TREND CHART (6/10)

- Add “Split by Field” for “Enrollment Status”



Configure Visual

SERIES 1

Series name
NCAIR NCCCS IPEDS Retention Rates With Dates

Series chart type *
Line

Select Dataset
NCAIR NCCCS IPEDS Retention Rates With Dates (ncairNcccsIpedeRete

Date Field *
Date

Value Field *
Average Retention Rate

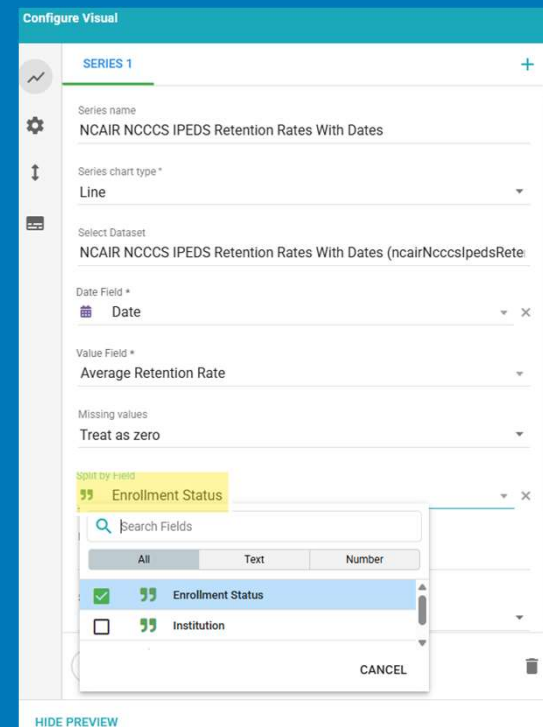
Missing values
Treat as zero

Split by Field

Regression Equation

Y-Axis
Axis 1

HIDE PREVIEW



Configure Visual

SERIES 1

Series name
NCAIR NCCCS IPEDS Retention Rates With Dates

Series chart type *
Line

Select Dataset
NCAIR NCCCS IPEDS Retention Rates With Dates (ncairNcccsIpedeRete

Date Field *
Date

Value Field *
Average Retention Rate

Missing values
Treat as zero

Split by Field
Enrollment Status

Search Fields

All Text Number

Enrollment Status

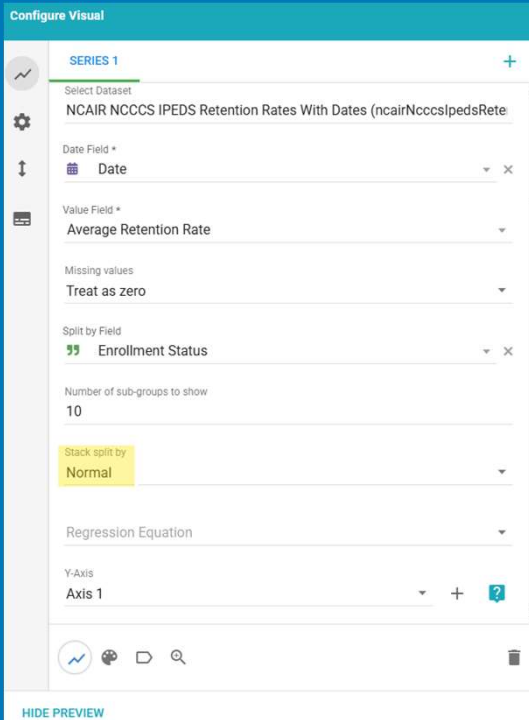
Institution

CANCEL

HIDE PREVIEW

ADD A TREND CHART (7/10)

- Change “Stack Split by” from “Normal” to “None”



Configure Visual

SERIES 1

Select Dataset
NCAIR NCCCS IPEDS Retention Rates With Dates (ncairNcccsIpedeRete

Date Field *
Date

Value Field *
Average Retention Rate

Missing values
Treat as zero

Split by Field
Enrollment Status

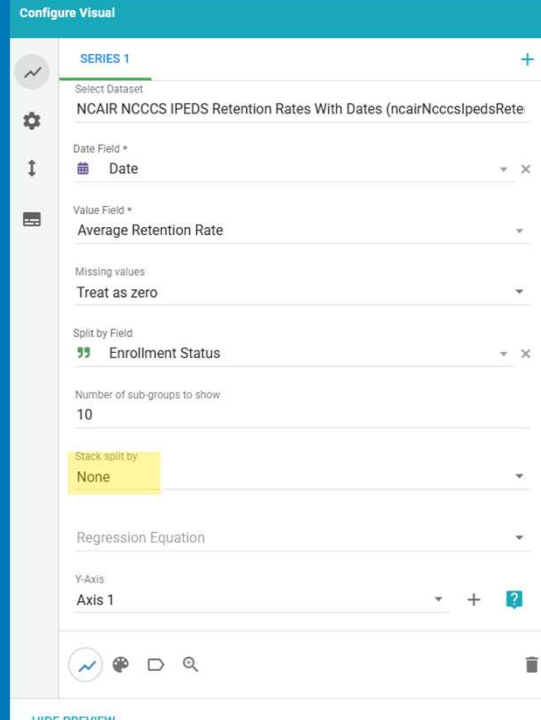
Number of sub-groups to show
10

Stack split by
Normal

Regression Equation

Y-Axis
Axis 1

HIDE PREVIEW



Configure Visual

SERIES 1

Select Dataset
NCAIR NCCCS IPEDS Retention Rates With Dates (ncairNcccsIpedeRete

Date Field *
Date

Value Field *
Average Retention Rate

Missing values
Treat as zero

Split by Field
Enrollment Status

Number of sub-groups to show
10

Stack split by
None

Regression Equation

Y-Axis
Axis 1

HIDE PREVIEW

ADD A TREND CHART (8/10)



- Add Labels
 - On the bottom menu, select the Labels option
 - Select “Show labels in-line”
 - Select “Value”
- Click “Apply”
 - Photos on next slide

ADD A TREND CHART (9/10)

Configure Visual

SERIES 1

Select Dataset
NCAIR NCCCS IPEDS Retention Rates With Dates (ncairNcccsipedsRete

Date Field *
Date

Value Field *
Average Retention Rate

Missing values
Treat as zero




Split by Field
Enrollment Status

Number of sub-groups to show
10

Stack split by
None

Regression Equation

Y-Axis
Axis 1

HIDE PREVIEW



Configure Visual




SERIES 1

Data labels
 Show labels in-line

Tooltip

Decimal places

Tooltip prefix Tooltip suffix

HIDE PREVIEW



Configure Visual

SERIES 1

Data labels
 Show labels in-line




Label content
 Group label
 Value
 Percent

Decimal places

Tooltip

Decimal places

Tooltip prefix Tooltip suffix

HIDE PREVIEW

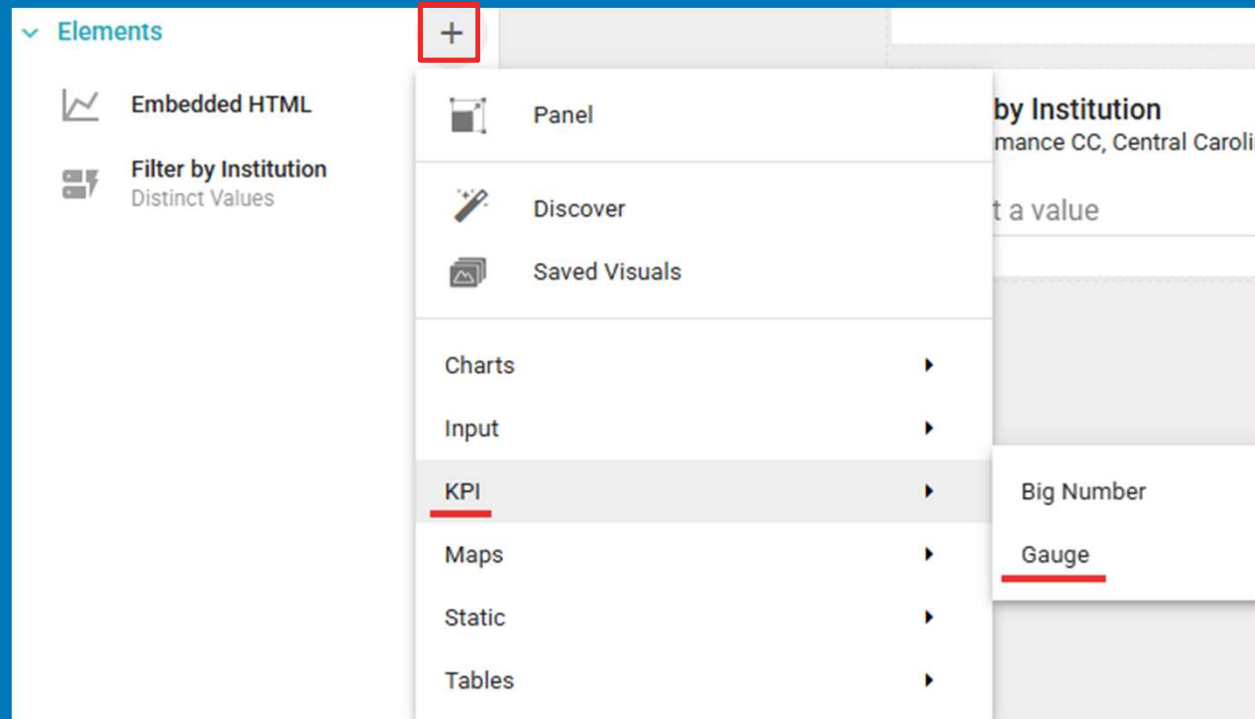
ADD A TREND CHART (10/10)

- Adjust the size of the chart to your liking
- Adjust Title and Description
 - Click the Ellipsis (. . .)
 - Click “Edit Name/Description”



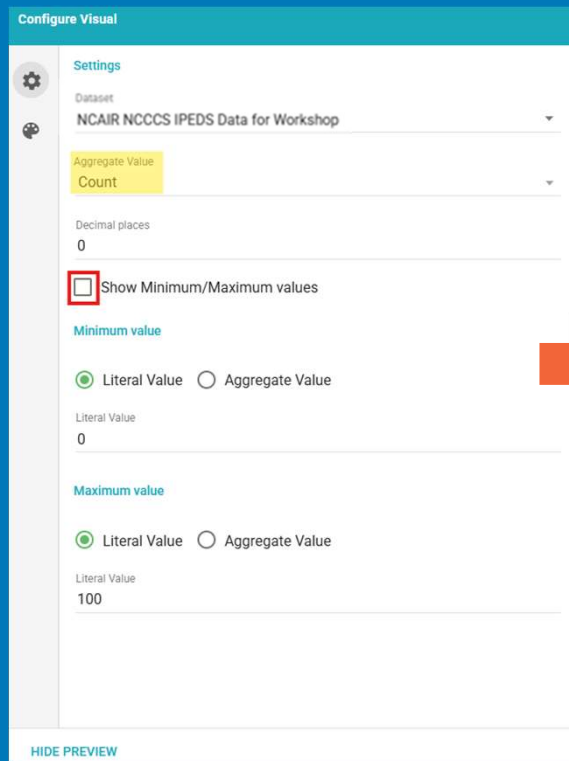
ADD A GAUGE (1/4)

- Within the menu, select “+” to the right of “Elements”
 - Select “KPI”
 - Select “Gauge”



ADD A GAUGE (2/4)

- Verify the dataset is “NCAIR NCCCS IPEDS Data for Workshop”
- Change “Aggregate Value” to “Average Average amount of federal . . .”
 - Click the “Aggregate value” field
 - Click “>” to left of “Average amount of federal . . .”
 - Select “Average”
- Click “Show Minimum/Maximum values”



Configure Visual

Settings

Dataset
NCAIR NCCCS IPEDS Data for Workshop

Aggregate Value
Count

Decimal places
0

Show Minimum/Maximum values

Minimum value

Literal Value Aggregate Value

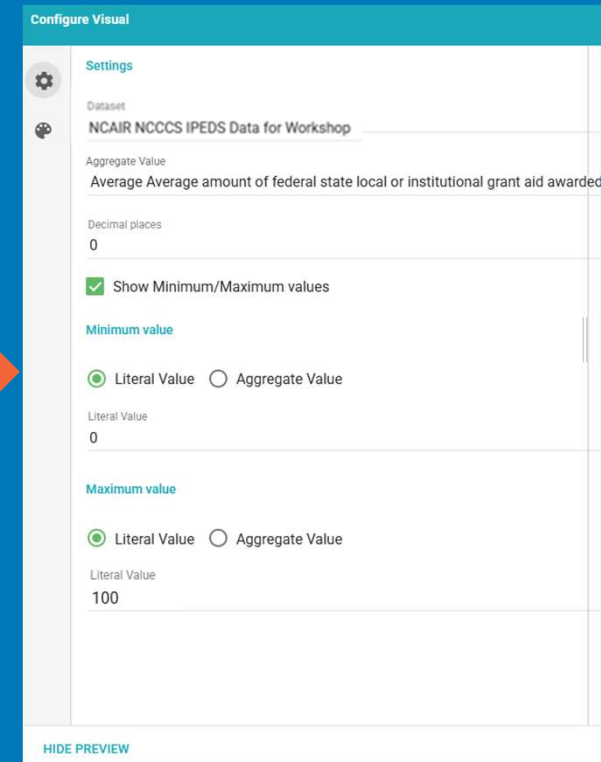
Literal Value
0

Maximum value

Literal Value Aggregate Value

Literal Value
100

HIDE PREVIEW



Configure Visual

Settings

Dataset
NCAIR NCCCS IPEDS Data for Workshop

Aggregate Value
Average Average amount of federal state local or institutional grant aid awarded

Decimal places
0

Show Minimum/Maximum values

Minimum value

Literal Value Aggregate Value

Literal Value
0

Maximum value

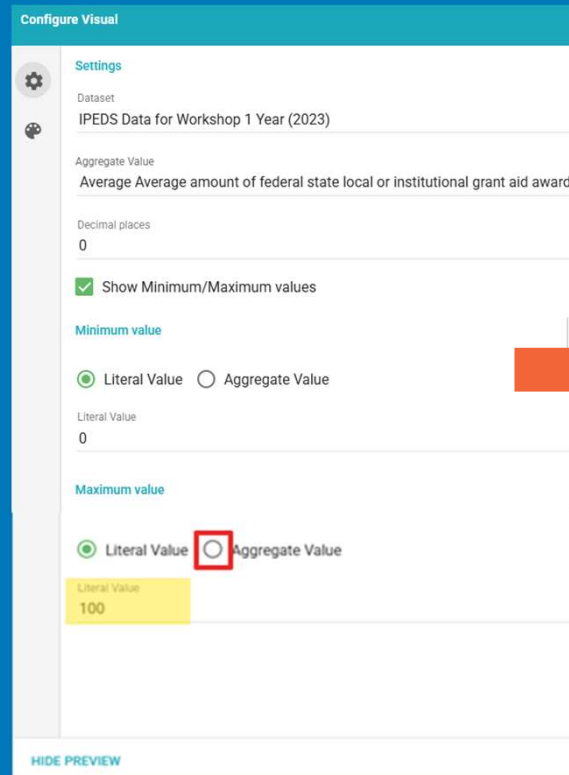
Literal Value Aggregate Value

Literal Value
100

HIDE PREVIEW

ADD A GAUGE (3/4)

- Change “Maximum Value” from “Literal Value” to “Aggregate Value”
 - Click the “Aggregate value” field under “Maximum value”
 - Click “>” to left of “Average amount of federal . . .”
 - Select “Maximum”
- Click “Apply”



Configure Visual

Settings

Dataset
IPEDS Data for Workshop 1 Year (2023)

Aggregate Value
Average Average amount of federal state local or institutional grant aid awarded

Decimal places
0

Show Minimum/Maximum values

Minimum value

Literal Value Aggregate Value

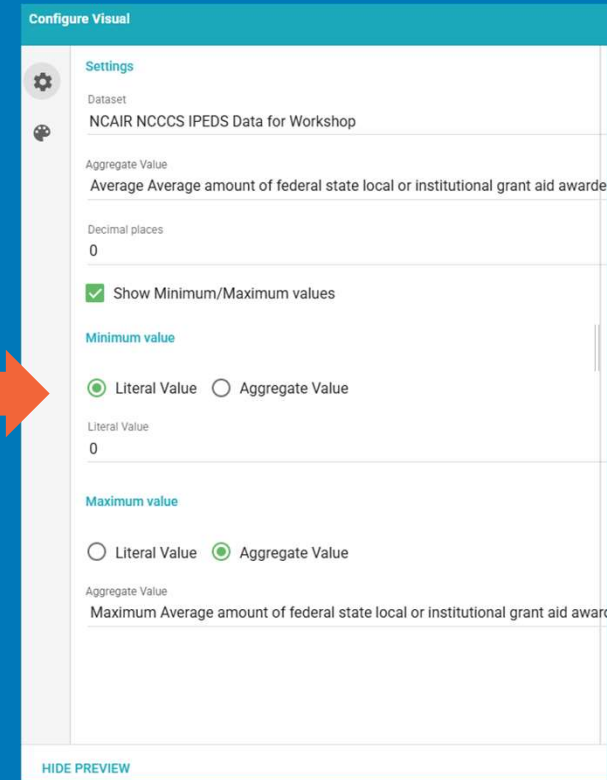
Literal Value
0

Maximum value

Literal Value Aggregate Value

Literal Value
100

HIDE PREVIEW



Configure Visual

Settings

Dataset
NCAIR NCCCS IPEDS Data for Workshop

Aggregate Value
Average Average amount of federal state local or institutional grant aid awarded

Decimal places
0

Show Minimum/Maximum values

Minimum value

Literal Value Aggregate Value

Literal Value
0

Maximum value

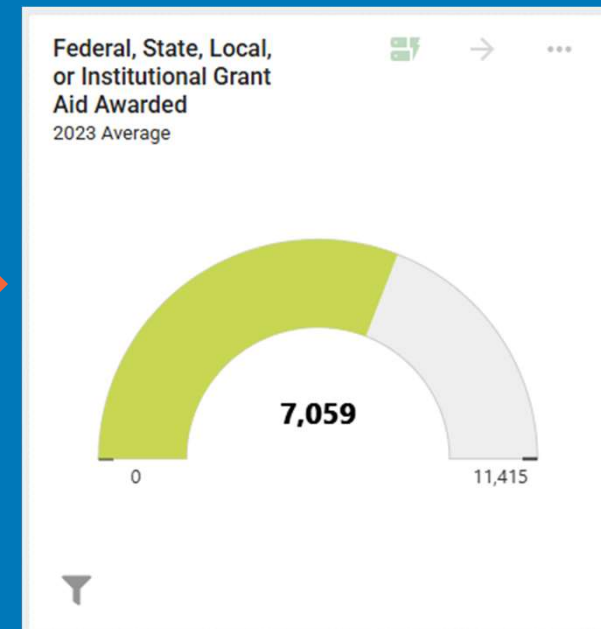
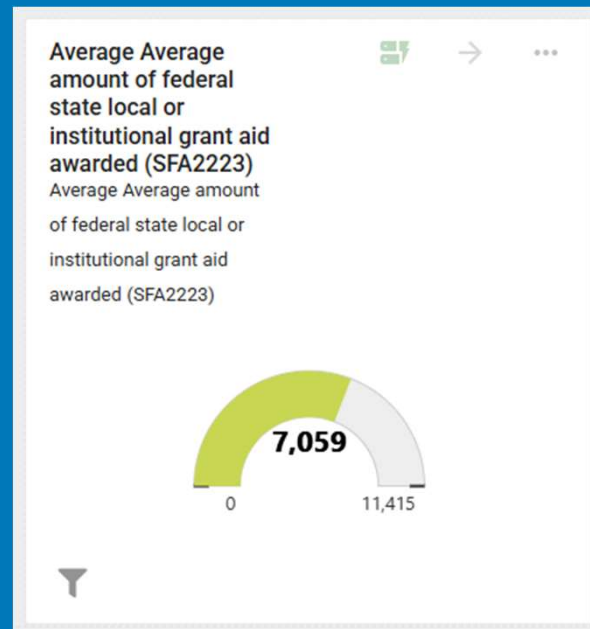
Literal Value Aggregate Value

Aggregate Value
Maximum Average amount of federal state local or institutional grant aid awarded

HIDE PREVIEW

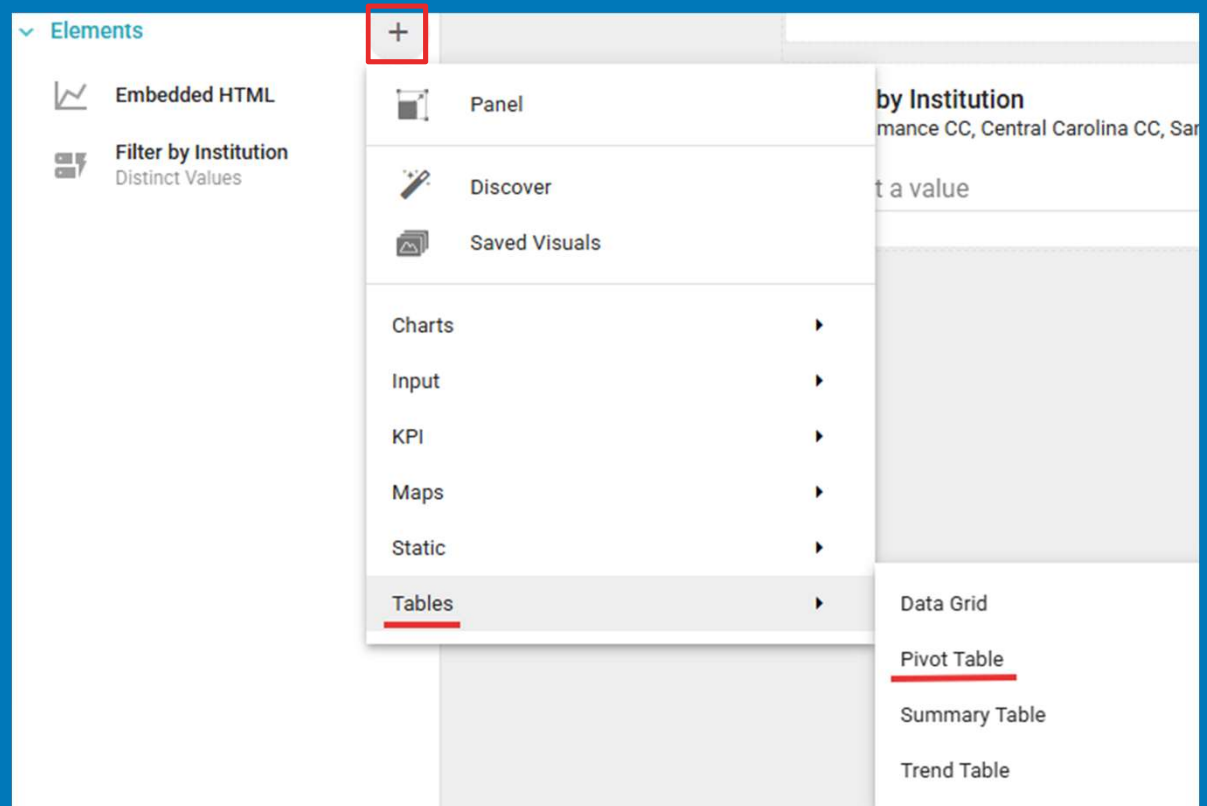
ADD A GAUGE (4/4)

- Adjust size of visual
- Adjust Title and Description
 - Click the Ellipsis (. . .)
 - Click “Edit Name/Description”



ADD A PIVOT TABLE (1/4)

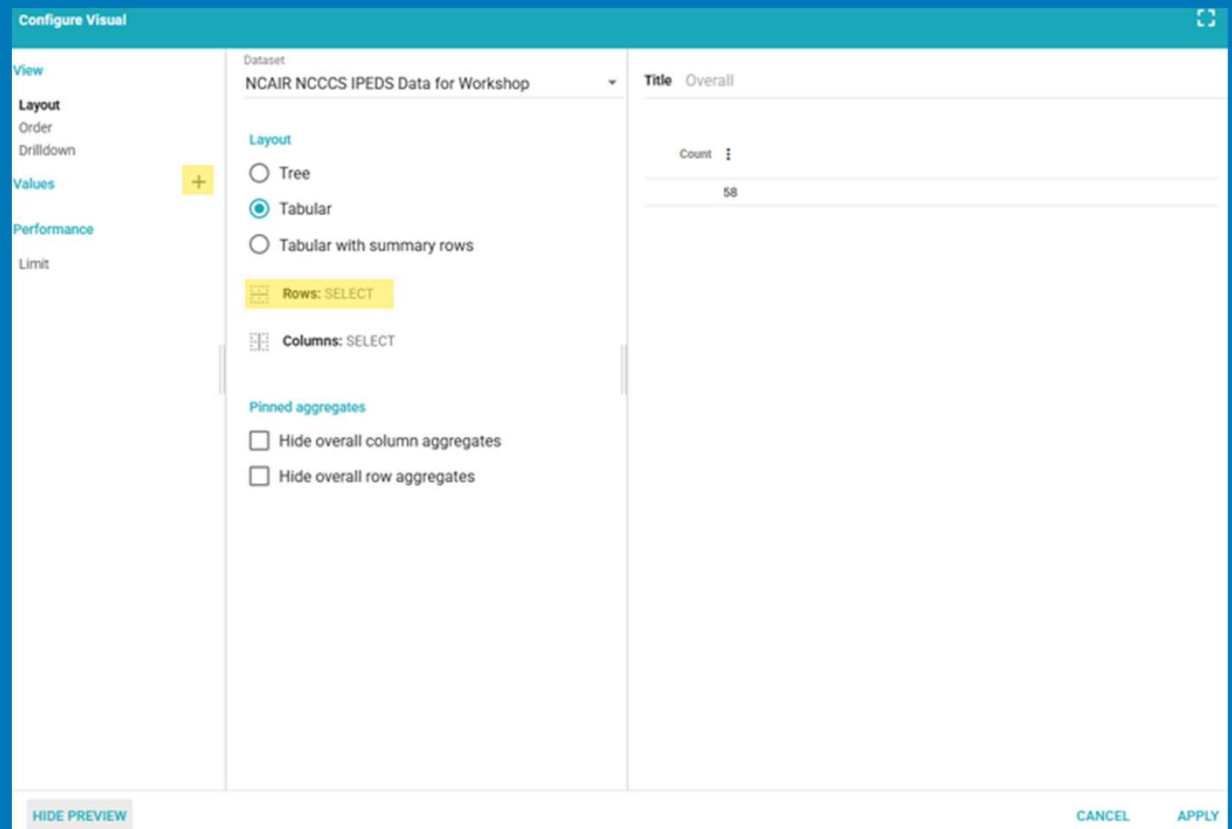
- Within the menu, select “+” to the right of “Elements”
- Select “Tables”
 - Select “Pivot Table”



The screenshot shows a software interface with a left sidebar and a main content area. The sidebar has a 'Elements' section with a plus sign icon to its right. The main content area shows a menu with the following items: Panel, Discover, Saved Visuals, Charts, Input, KPI, Maps, Static, Tables, Data Grid, Pivot Table, Summary Table, and Trend Table. The 'Tables' item is highlighted with a red underline, and the 'Pivot Table' item is also highlighted with a red underline. The plus sign icon in the sidebar is also highlighted with a red box.

ADD A PIVOT TABLE (2/4)

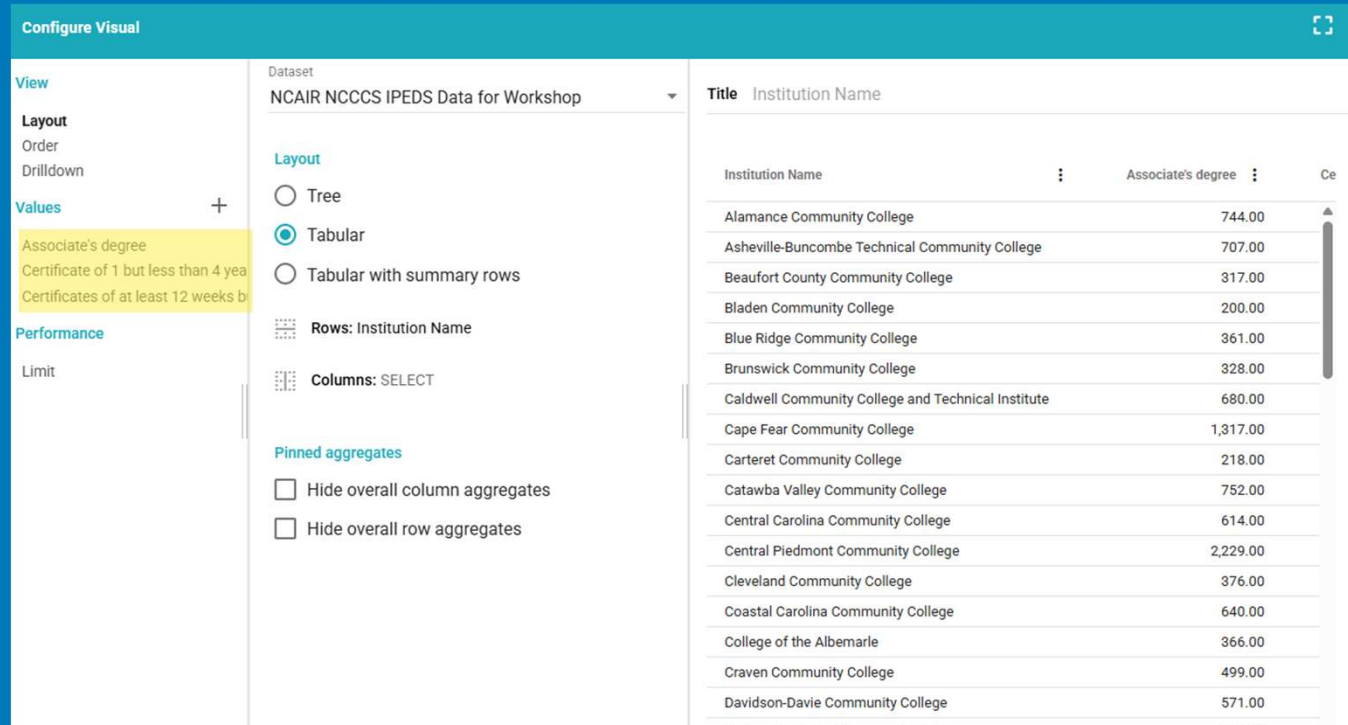
- Verify the dataset is “NCAIR NCCCS IPEDS Data for Workshop”
- Click “Rows” and Select “Institution Name”
- Click “+” to right of “Values” and add . . .
 - “Maximum Certificate of 1 but less than 4 years”
 - “Maximum Certificates of at least 12 weeks but less than 1 year”
 - “Maximum Associate's degree”



The screenshot shows the 'Configure Visual' interface for a pivot table. The dataset is 'NCAIR NCCCS IPEDS Data for Workshop'. The layout is set to 'Tabular'. The 'Rows' field is set to 'SELECT' and the 'Columns' field is set to 'SELECT'. The 'Pinned aggregates' section has two checkboxes: 'Hide overall column aggregates' and 'Hide overall row aggregates', both of which are unchecked. The 'Title' is 'Overall' and the 'Count' is '58'. The interface includes a 'HIDE PREVIEW' button at the bottom left and 'CANCEL' and 'APPLY' buttons at the bottom right.

ADD A PIVOT TABLE (3/4)

- Change value row title by clicking the column header under “Values”
 - Modify “Column Header”
- Select “Apply”



Configure Visual

Dataset: NCAIR NCCCS IPEDS Data for Workshop

Title: Institution Name

View: Institution Name, Associate's degree, Ce

Institution Name	Associate's degree	Ce
Alamance Community College	744.00	
Asheville-Buncombe Technical Community College	707.00	
Beaufort County Community College	317.00	
Bladen Community College	200.00	
Blue Ridge Community College	361.00	
Brunswick Community College	328.00	
Caldwell Community College and Technical Institute	680.00	
Cape Fear Community College	1,317.00	
Carteret Community College	218.00	
Catawba Valley Community College	752.00	
Central Carolina Community College	614.00	
Central Piedmont Community College	2,229.00	
Cleveland Community College	376.00	
Coastal Carolina Community College	640.00	
College of the Albemarle	366.00	
Craven Community College	499.00	
Davidson-Davie Community College	571.00	

Layout: Tree, Tabular (selected), Tabular with summary rows

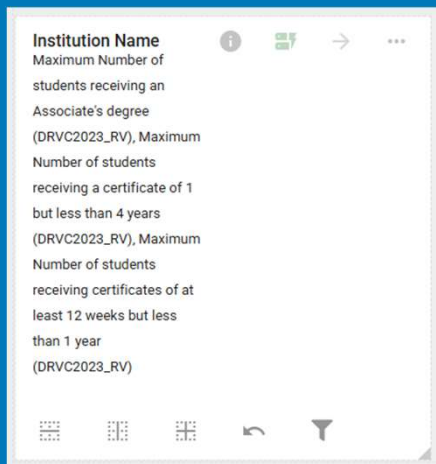
Rows: Institution Name

Columns: SELECT

Pinned aggregates: Hide overall column aggregates, Hide overall row aggregates

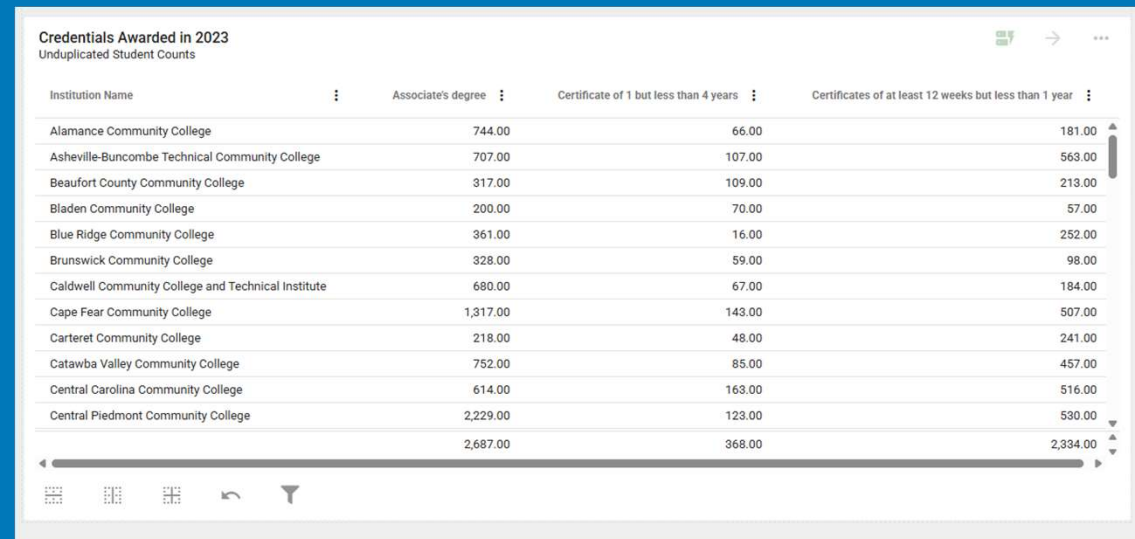
ADD A PIVOT TABLE (4/4)

- Adjust the size of the chart to your liking
- Adjust Title and Description
 - Click the Ellipsis (. . .)
 - Click “Edit Name/Description”



Institution Name ⓘ ⌵ → ...
Maximum Number of students receiving an Associate's degree (DRVC2023_RV), Maximum Number of students receiving a certificate of 1 but less than 4 years (DRVC2023_RV), Maximum Number of students receiving certificates of at least 12 weeks but less than 1 year (DRVC2023_RV)

⌵ ⌶ ⌷ ⌸ ⌹



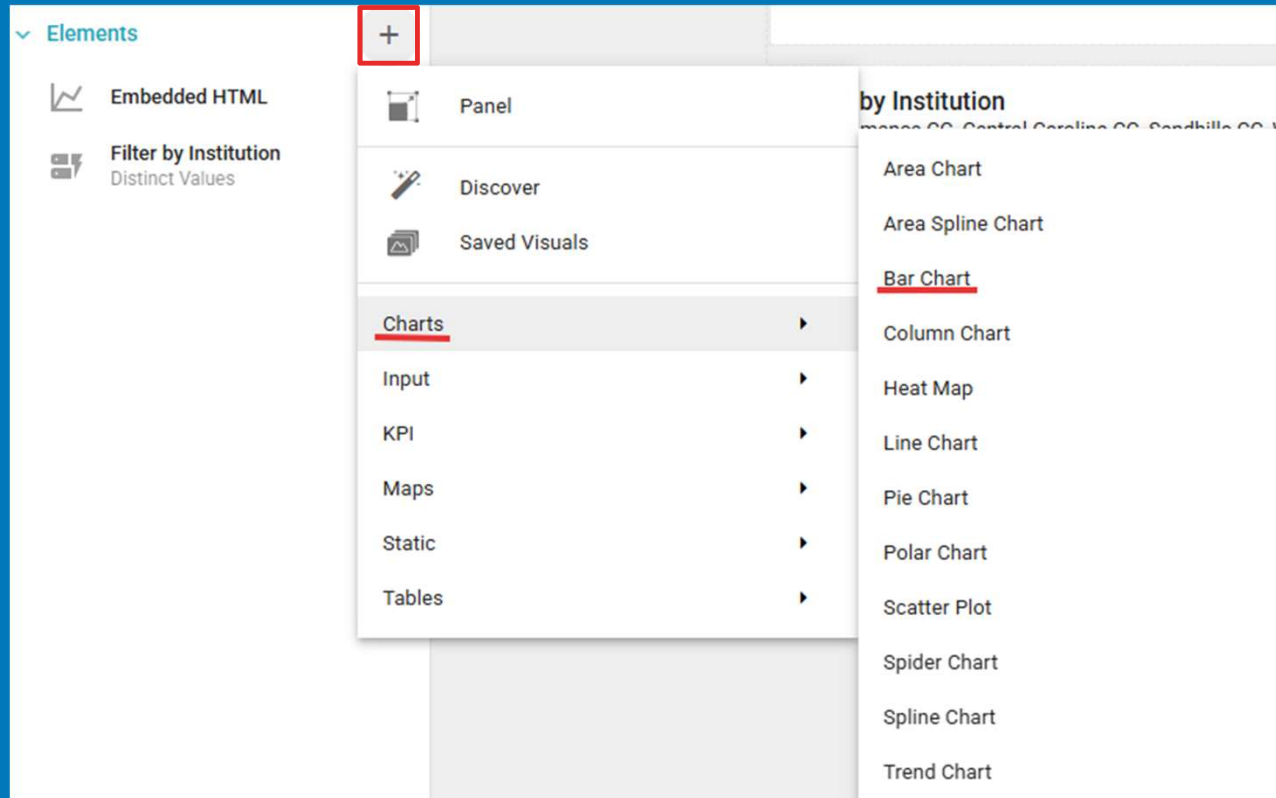
Credentials Awarded in 2023
Unduplicated Student Counts ⓘ ⌵ ...

Institution Name	Associate's degree	Certificate of 1 but less than 4 years	Certificates of at least 12 weeks but less than 1 year
Alamance Community College	744.00	66.00	181.00
Asheville-Buncombe Technical Community College	707.00	107.00	563.00
Beaufort County Community College	317.00	109.00	213.00
Bladen Community College	200.00	70.00	57.00
Blue Ridge Community College	361.00	16.00	252.00
Brunswick Community College	328.00	59.00	98.00
Caldwell Community College and Technical Institute	680.00	67.00	184.00
Cape Fear Community College	1,317.00	143.00	507.00
Carteret Community College	218.00	48.00	241.00
Catawba Valley Community College	752.00	85.00	457.00
Central Carolina Community College	614.00	163.00	516.00
Central Piedmont Community College	2,229.00	123.00	530.00
	2,687.00	368.00	2,334.00

⌵ ⌶ ⌷ ⌸ ⌹

ADD A BAR CHART (1/7)

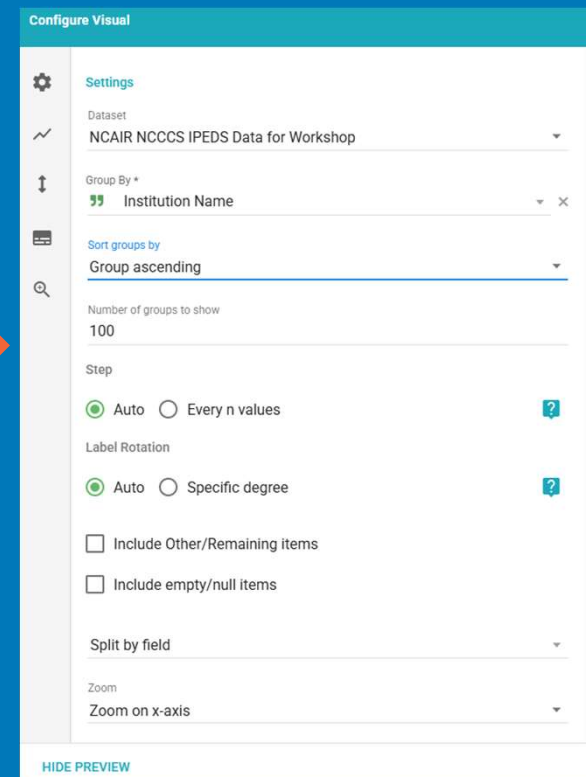
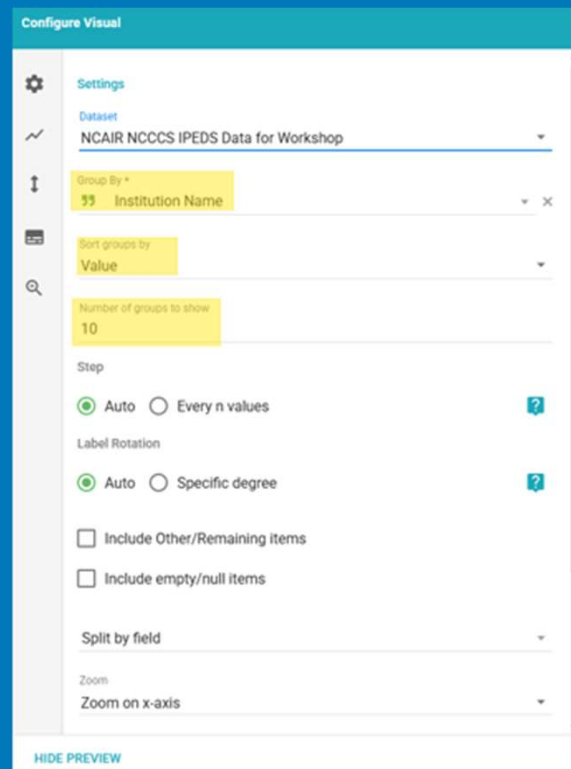
- Within the menu, select “+” to the right of “Elements”
 - Select “Charts”
 - Select “Bar Chart”



The screenshot shows a software interface with a menu system. On the left, under the heading "Elements", there are two options: "Embedded HTML" and "Filter by Institution" (with a sub-option "Distinct Values"). To the right of the "Elements" heading is a plus sign (+) enclosed in a red box. A dropdown menu is open from this plus sign, listing several categories: "Panel", "Discover", "Saved Visuals", "Charts", "Input", "KPI", "Maps", "Static", and "Tables". The "Charts" category is highlighted with a red underline and has a right-pointing arrow. A second dropdown menu is open from "Charts", listing various chart types: "Area Chart", "Area Spline Chart", "Bar Chart" (highlighted with a red underline), "Column Chart", "Heat Map", "Line Chart", "Pie Chart", "Polar Chart", "Scatter Plot", "Spider Chart", "Spline Chart", and "Trend Chart".

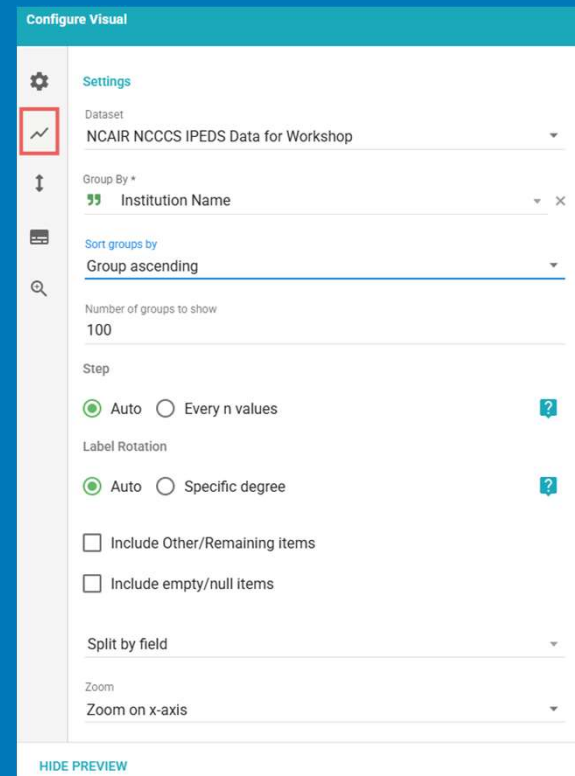
ADD A BAR CHART (2/7)

- Verify the dataset is “NCAIR NCCCS IPEDS Data for Workshop”
- Group by “Institution Name”
- Sort groups by “Group ascending”
- Change the Number of groups to show from “10” to “100”



ADD A BAR CHART (3/7)

- Go to “Series”
- Change “Value field” from “Count” to “Maximum Percent of full-time first-time undergraduates awarded Pell grants (SFA2223)”
 - Click “>” to left of “Percent of full-time first-time undergraduates awarded Pell grants (SFA2223)”
 - Select “Maximum”
- Photos on next slide



ADD A BAR CHART (4/7)

Configure Visual

SERIES 1

Value

Per-group Overall Literal

Value field *

Count

Missing values

Exclude, connecting the values before and after

Series name

Auto

Series chart type *

Bar

Y-Axis

Axis 1



Configure Visual

SERIES 1

Value

Per-group Overall Literal

Value field *

Maximum Percent of full-time first-time undergraduates awarded Pell grants (S

Missing values

Exclude, connecting the values before and after

Series name

Auto

Series chart type *

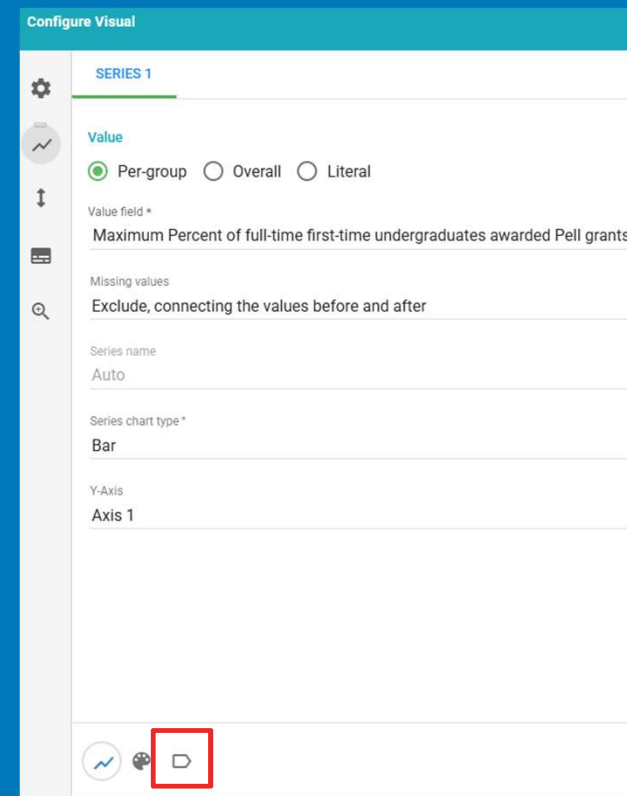
Bar

Y-Axis

Axis 1

ADD A BAR CHART (5/7)

- Add Labels
 - On the bottom menu, select the “Labels” option
 - Select “Show labels in-line”
 - Select “Value”
- Click “Apply”
 - Photos on next slide



ADD A BAR CHART (6/7)

Configure Visual

SERIES 1

Data labels

Show labels in-line

Tooltip

Decimal places

Tooltip prefix Tooltip suffix

HIDE PREVIEW



Configure Visual

SERIES 1

Data labels

Show labels in-line

Label content

Group label

Value

Percent

Decimal places

Tooltip

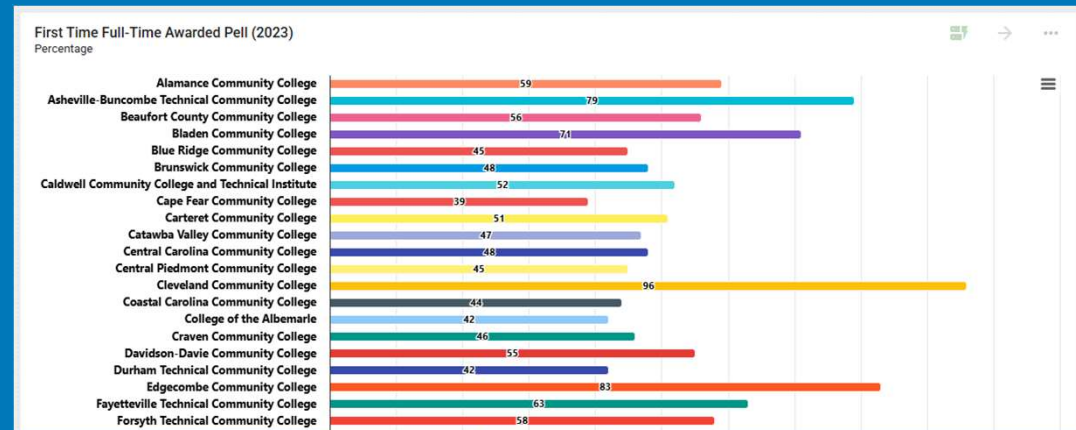
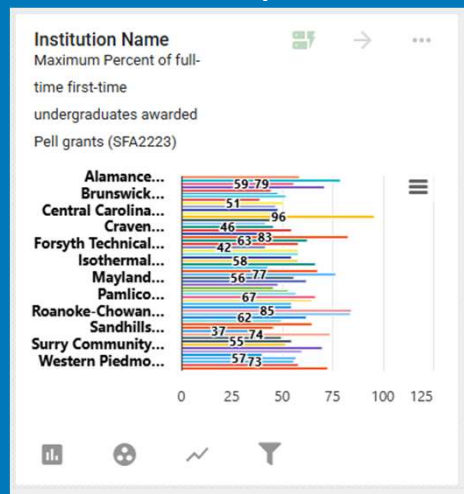
Decimal places

Tooltip prefix Tooltip suffix

HIDE PREVIEW

ADD A BAR CHART (7/7)

- Adjust the size of the chart to your liking
- Adjust Title and Description
 - Click the Ellipsis (. . .)
 - Click “Edit Name/Description”





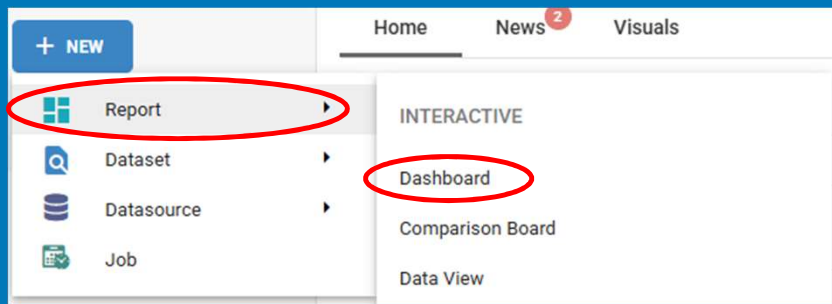
CONGRATULATIONS!

You built your FIRST dashboard in Informer 5!

DASHBOARD CREATION PRACTICE! PARTICIPANT'S IPEDS FILE



ADD: NEW DASHBOARD & 2 DATASETS

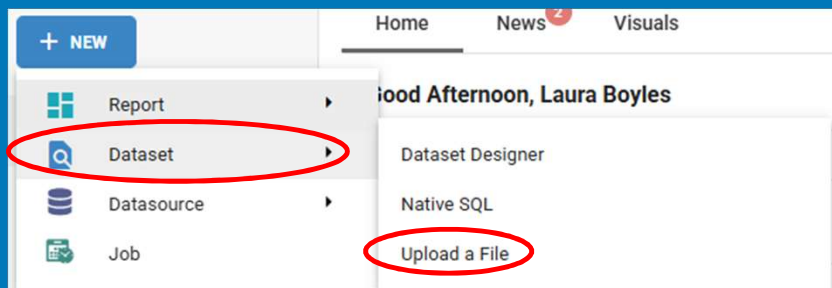


Add Dashboard:

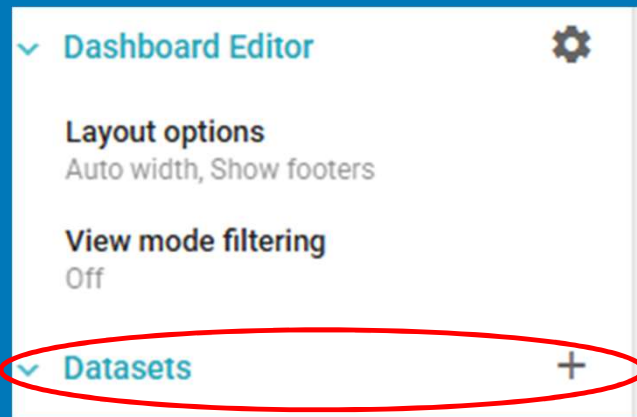
- Click on Blue “+ New” -> click on “Report” -> click on “Dashboard”
- Name new report – suggestion “NCAIR Workshop – Part 2”

Upload Datasets:

- Click on Blue “+ New” -> click on “Dataset” -> click on “Upload a File”
- Select file from Downloads or Desktop
Select appropriate tab from drop down
- Repeat Process to Upload other dataset



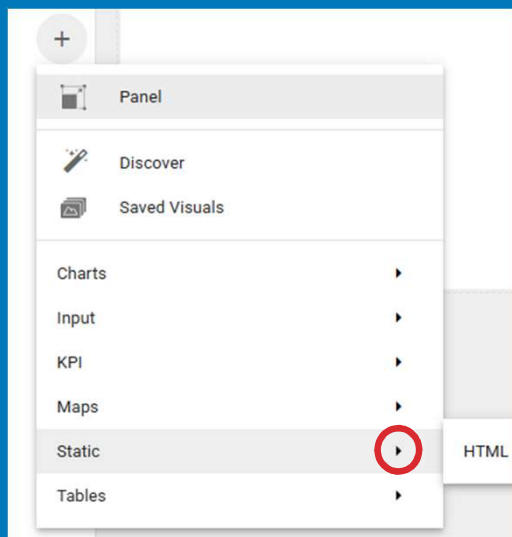
OPEN DASHBOARD & ADD 2 DATASETS



- Open new dashboard
- Click on “+” sign to right of “Datasets” to add the 2 datasets uploaded:
 1. Workshop 2a
 2. Workshop 2b
- At “Select Dataset” start typing name of dataset to find desired file

ADD: HEADER

Elements 



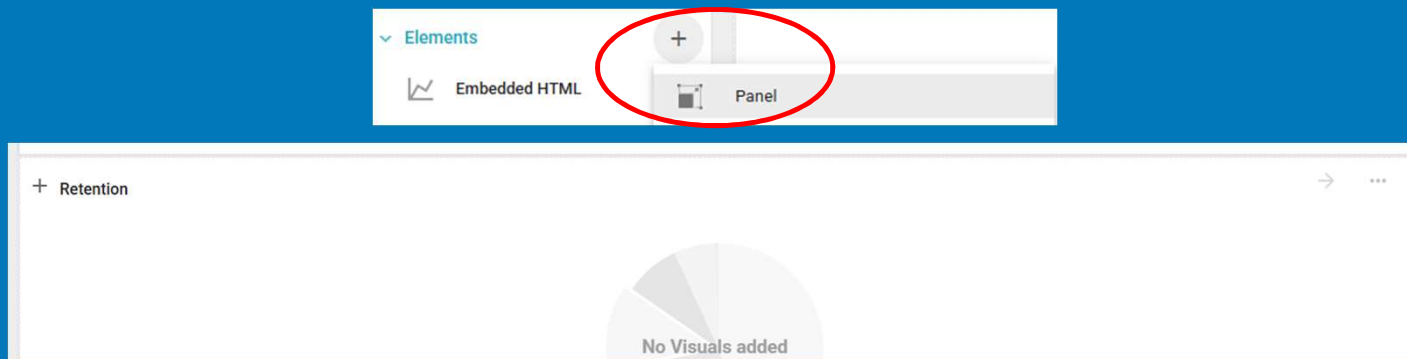
NCAIR Workshop

CCCC Data

NCAIR Conference 2026

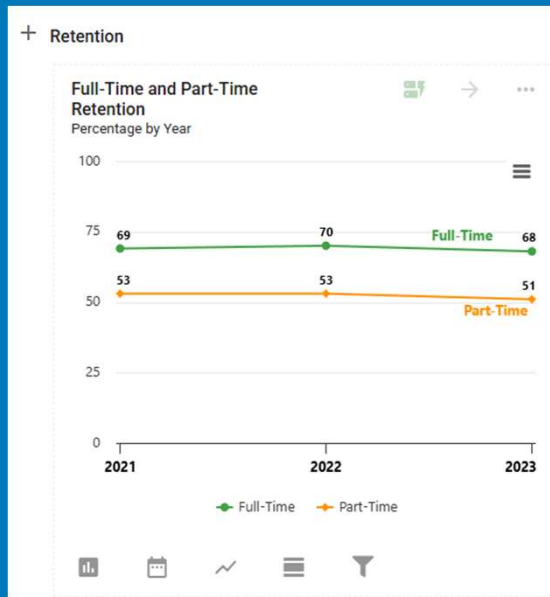
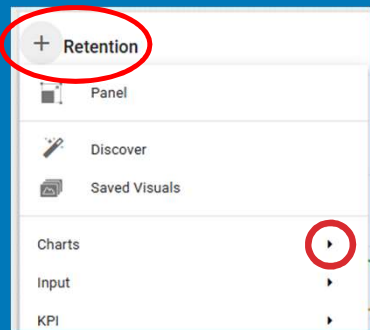
- Click on “+” sign to right of “Elements”
- Click on arrow to right of “Static”
- Click on “HTML”
- Type in a Title for this dashboard
- As time permits, add additional lines and change font characteristics

★ ADD: PANEL - RETENTION



- Click on “+” sign to right of “Elements”
- Click on “Panel”
- Next to “Title” type in the name of this section of the dashboard “Retention”
- Click “Apply”

ADD: TREND CHART WITHIN RETENTION PANEL ★



- Within the “Retention” panel, click “+” to Left of “Retention”
- Click arrow right of “Charts”, then click on “Trend Chart”
- Configure:
 - Series chart type: Line
 - Select Dataset: Part 2a
 - Date Field: Year
 - Value Field: FT Retention -> Maximum
 - Split by Field: Full-Time
 - Stack split by: None
 - ⬆️ Y-Axes: Minimum = 0; Maximum = 100
 - Apply

Other Changes, as time permits:

- Change line colors: click on each and choose color
- Edit Name and Description

ADD: GAUGE WITHIN RETENTION PANEL ★



- Within the “Retention” panel, click “+” to Left of “Retention”
- Click arrow right of “KPI”, then click on “Gauge”
- Configure:
 - Select Dataset: Part 2a
 - Aggregate Value: FT Retention -> Average
 - Minimum Value: check Literal Value = 0
 - Maximum Value : check Literal Value = 100
 - Apply
- ONLY FT Retention:
 - Click on filter/funnel at bottom of chart
 - Click on “+” at top left of pop-up
 - Click on “Full-Time”
 - Select “Full-Time” only

Other Changes, as time permits:

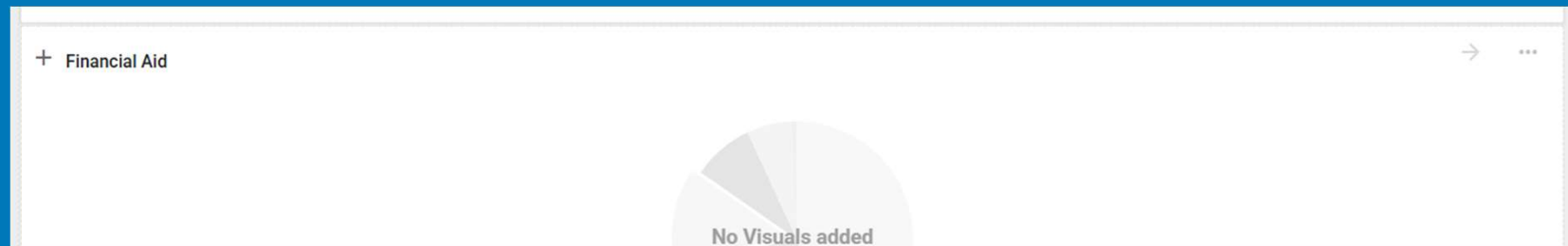
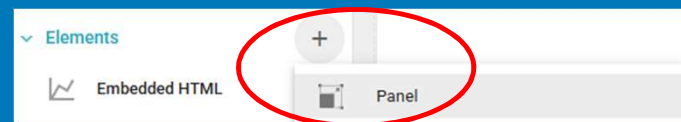
- Change Stop Colors: Configure -> Painters pallet on left
- Edit Name and Description

ADD: BIG NUMBER WITHIN RETENTION PANEL ★



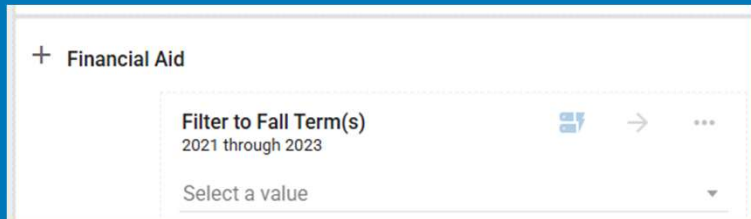
- Within the “Retention” panel, click “+” to Left of “Retention”
 - Click arrow right of “KPI”, then click on “Big Number”
 - Configure:
 - Select Dataset: Part 2a
 - Aggregate Value: FT Retention -> Average
 - Font size: 100
 - Decimal places: 0
 - Unselect “Approximate”
 - Apply
 - ONLY FT Retention:
 - Click on filter/funnel at bottom of chart
 - Click on “+” at top left of pop-up
 - Click on “Full-Time”
 - Select “Part-Time” only
- Other Changes, as time permits:
- Edit Name and Description

★ ADD: PANEL – FINANCIAL AID



- Click on “+” sign to right of “Elements”
- Click on “Panel”
- Next to “Title” type in the name of this section of the dashboard
“Financial Aid”
- Click “Apply”

ADD: FILTER WITHIN FINANCIAL AID PANEL ★

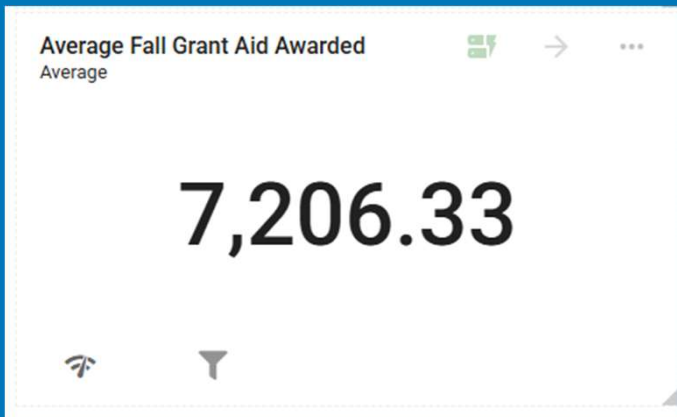


- Within the “Financial Aid” panel, click “+” to Left of “Financial Aid”
- Click arrow right of “Input”, then select “Distinct Values”
- Next to Part 2b dataset click “Select Field”
- Select “Yr Cat”
- Click “Choose which of the following ...”
- Select Part 2b
- Apply

Other Changes, as time permits:

- Edit Name and Description

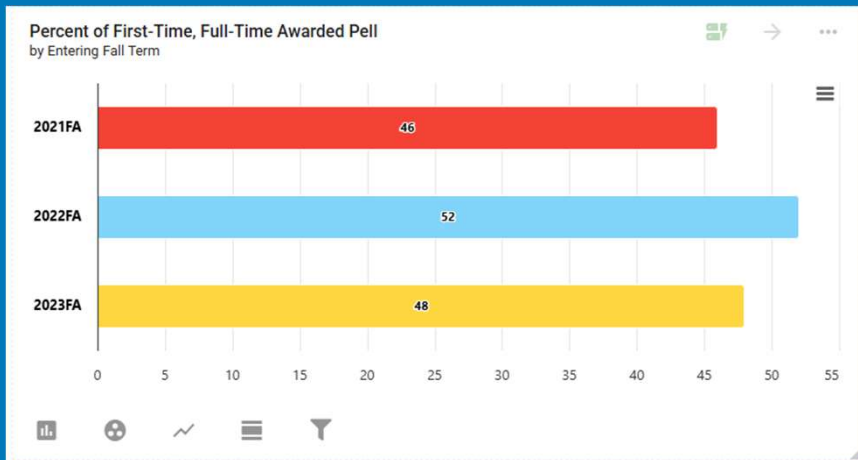
ADD: BIG NUMBER WITHIN FINANCIAL AID PANEL ★



What is problematic with
this data point???

- Within the “Financial Aid” panel, click “+” to Left of “Financial Aid”
 - Click arrow right of “KPI”, then click on “Big Number”
 - Configure:
 - Select Dataset: Part 2b
 - Aggregate Value: Average Grant Aid Awarded -> Average
 - Font size: 100
 - Decimal places: 2
 - Unselect “Approximate”
 - Apply
- Other Changes, as time permits:
- Edit Name and Description

ADD: BAR CHART WITHIN FINANCIAL AID PANEL ★



- Within the “Financial Aid” panel, click “+” to Left of “Financial Aid”
- Click arrow right of “Charts”, then click on “Bar Chart”
- Configure:
 - Select Dataset: Part 2b
 - Group by: “Yr Cat”
 - Sort groups by: “Group ascending”
 - Split by field: “Yr Cat”
 - ⚡ Select “Series” in Left Nav, leave “Per-group”
 - Value field: “Percent FTFT Awarded Pell” -> Maximum
 - 📌 Select “Labels” at bottom, Click “Show labels in-line” and “Value”
 - Apply
- Other Changes, as time permits:
 - Change bar colors: click on each and choose color
 - Edit Name and Description



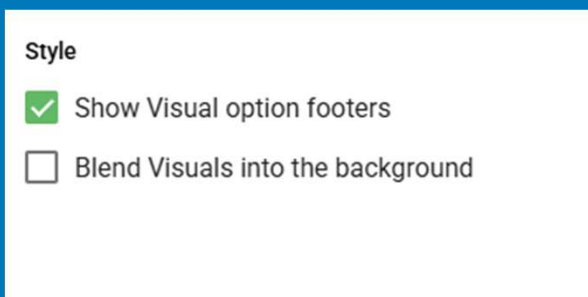
REMOVE: GLOBAL FILTER FROM BAR CHART WITHIN FINANCIAL AID PANEL



- Click on the green stacked tabs/books (“Applied Inputs”)
- Select “No filters” then “Done”
- Stack is now gray - Any filtering selected in the global filter box does NOT affect this chart.



REMOVE: CHART FOOTERS FILTER FROM ALL CHARTS



- In Left Navigation: Click on “Layout options” under “Dashboard Editor”
- At bottom of pop-up Unselect “Show Visual option Footers” then “Done”
- Notice all footer options have been removed from the bottom of every chart.
- WHY would you want to do this?
 - Avoid public facing dashboards connected to SIS
 - Remove possibility of drilling down to student-level information

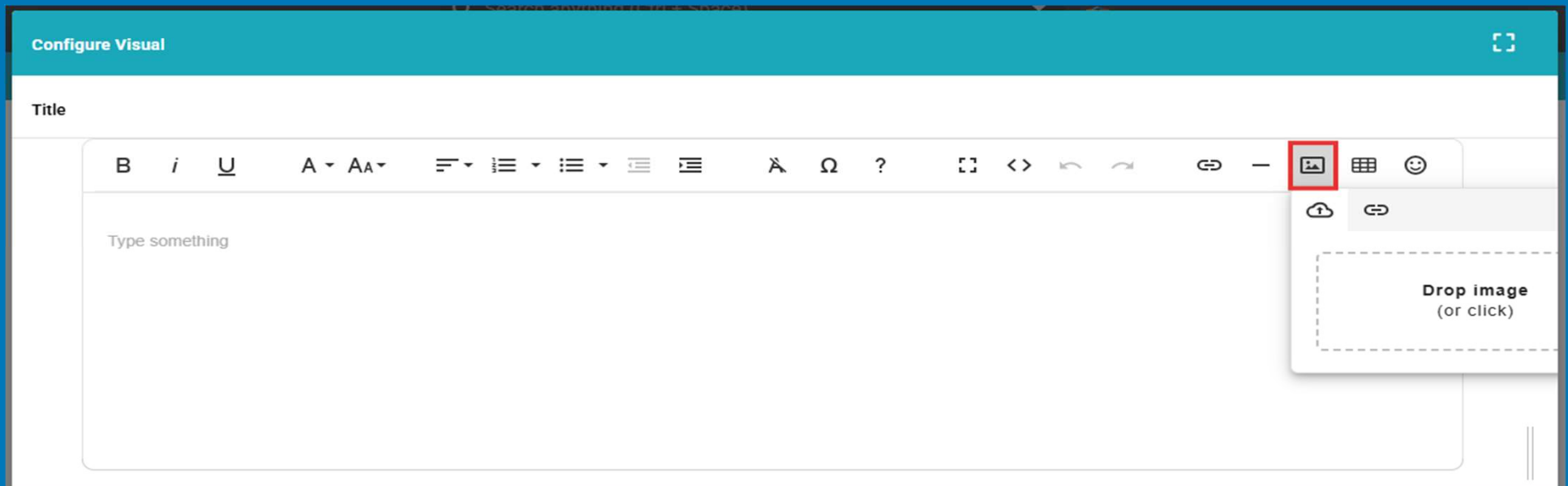
SHOW AND TELL: PULLING COLLEAGUE DATA INTO AN INFORMER 5 DASHBOARD

Please do not record or take pictures during this portion



INSERTING AN IMAGE (1/1)

- In your HTML Element, click the “Insert Image” Icon
 - Drag and Drop image or click to add from files

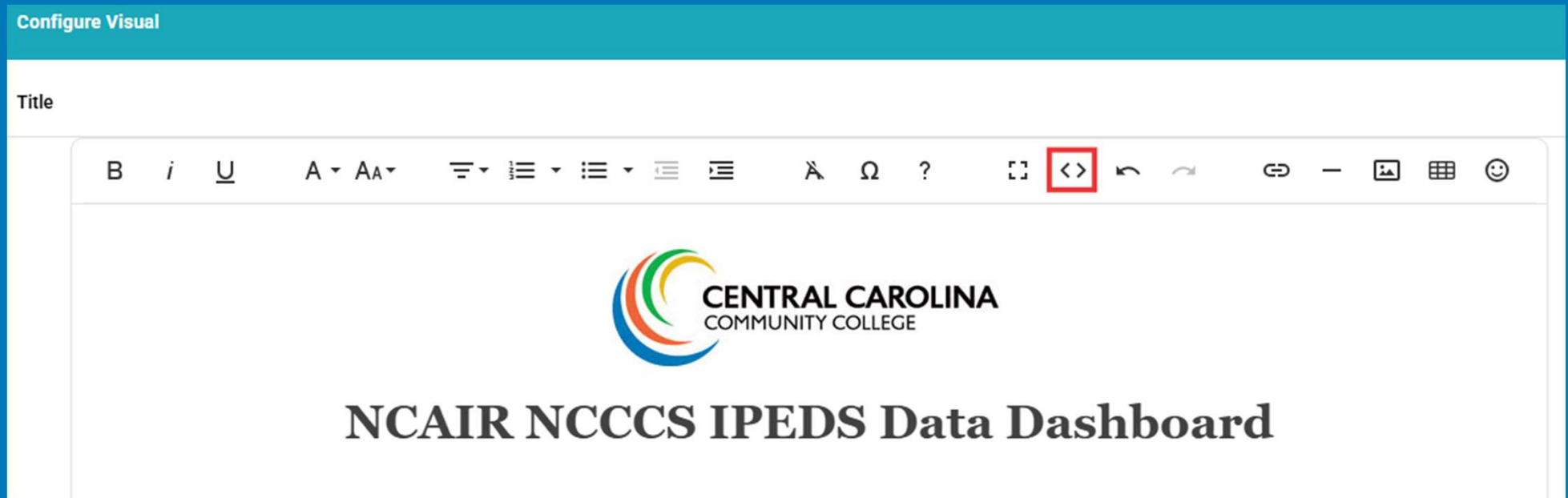


CHANGING TEXT COLOR (1/3)

- In your HTML Element, click the “Code View” icon

Configure Visual

Title



The screenshot shows a web editor interface. At the top, there is a teal header with the text "Configure Visual". Below this is a white area with a "Title" label. The main editing area contains a rich text editor toolbar with various icons for bold, italic, underline, font color, background color, bulleted list, numbered list, link, unlink, and other functions. The "Code View" icon, represented by two angle brackets "<>", is highlighted with a red square. Below the toolbar, the editor content displays the Central Carolina Community College logo and the text "NCAIR NCCCS IPEDS Data Dashboard".

CHANGING TEXT COLOR (1/3)



- This is how your header should look





QUESTIONS





**CENTRAL
CAROLINA**
COMMUNITY
COLLEGE

**THANK
YOU**



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Laura Boyles

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