

MARS – Canned Reports Work Instruction

Purpose

This work instruction is used to:

- Navigate to canned reports
- Save the report to your computer and My Folders
- Modify the query with new data elements and filters
- Schedule the report for a recurring email

Prerequisites

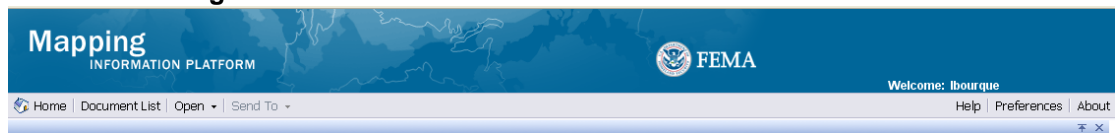
- User must be a registered MARS user
- Log into the MIP with your user name and password

Navigate to Canned Reports

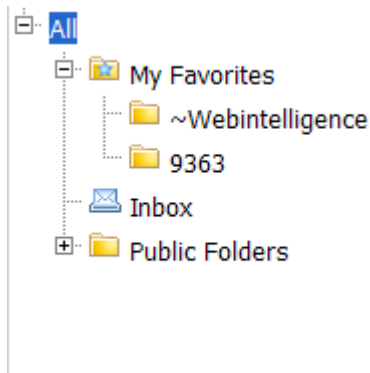
1. Click on the **MARS** tab. You must be a registered user and logged into the MIP to see the MARS tab.
2. From the MARS landing page, click on **Access MARS** to launch MARS in a new window.

The MIP window will remain open while you are in MARS.

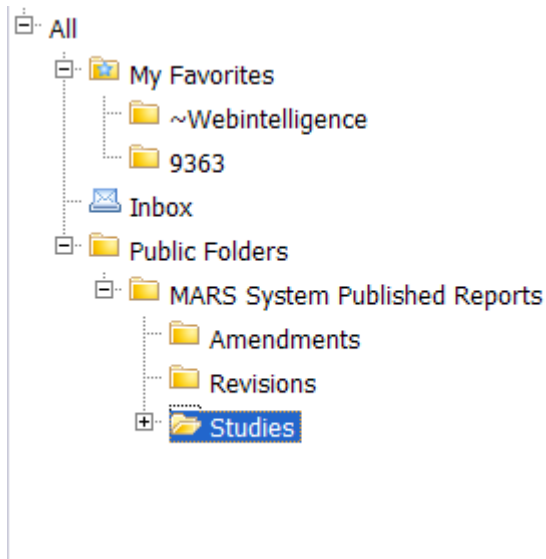
MARS Home Page



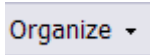
3. Click on **Document List** in the top left navigation bar
4. On the left hand navigation click the plus sign next to **My Favorites** to expand the folder

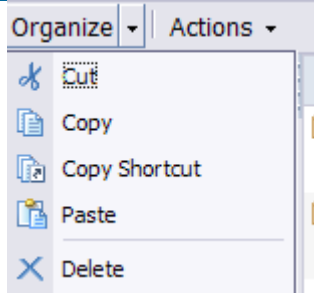


5. Click on the plus sign next to **Public Folders** to expand the folder
6. Click on the plus sign next to **Mars System Published Reports** to expand the folder
7. Click on the **Studies** link to view a list of all Studies canned reports.



Save the Report to My Favorites

8. Click on the report name you want to save. Report will appear highlighted once selected.
9. Click on:  dropdown arrow.
10. Select **Copy** to copy the report



11. Click on the **My Favorites** folder on the left hand side
12. In the open space to the right, right click and select paste
13. Your report is now saved in the **My Favorites** folder

.Modify the Query With New Data Elements and Filters


14. Click the Studies link to return to the list of canned Studies reports.
15. Double Click on the report link to open the report. In this simulation, we chose the **Current Workflow Activity Status Report**.
16. If the prompt box appears, use the arrows to move the required data to the right box. In the simulation example, to display data from a different Region, add the Region number to the Enter value(s) for Region box. Click on the Region number to highlight the correct Region.
17. Click the arrows to add the Region.

Another option is to type the Region number in the box below and click the arrow to add it to the query.

18. Remove the Region you don't want included in the report. Click to highlight the number.


19. Click on  to remove the Region from the box.


20. Click on  .


21. Click on  in the top right hand of your screen to hide the folder navigation panel to display more of the report.

Report View

Region	State	Case Number	Project Name	Task Name	Task Cost	Task Reporting Date
3	DC	10-03-0356S	Washington, DC, Federal Triangle Flood Study	Develop Hydraulic Data		6/24/2011
3	DC	10-03-0356S	Washington, DC, Federal Triangle Flood Study	Independent QA/QC of Develop Hydraulic Data		
3	DC	10-03-0356S	Washington, DC, Federal Triangle Flood Study	Obligate Project Funds		
3	DC	10-03-0356S	Washington, DC, Federal Triangle Flood Study	Post Preliminary Processing		
			Washington, DC, Federal Triangle			

22. Click on  to view the next page of the report.

23. Click on  arrow to move to the last page of the report. This also displays how many pages are in the report.

24. Click on  to the first page of the report.

Saving the Report to Your Computer

25. Click the **Document** dropdown arrow on the top left for options to save the report.

NOTE: Depending on your security settings, a pop up blocker may appear when you try to download a file to your computer. To avoid a pop up blocker appearing on your screen, hold down the Ctrl key when you click on the dropdown box. Continue to hold down the Ctrl key until the Save As screen.

26. Click on Excel to save the report into an Excel spreadsheet on your computer.

27. Click on  on the File Download screen.

28. Navigate to the folder on your computer to save the document. Click on

Save

29. Repeat steps 14 and 15 to open the report.

Don't forget - continue to hold the Ctrl key if you normally get a pop up blocker. Hold Ctrl until you reach the File Download screen.

You can also navigate to where you saved the report on your computer to open, view and modify the spreadsheet.

30. Click on

Open

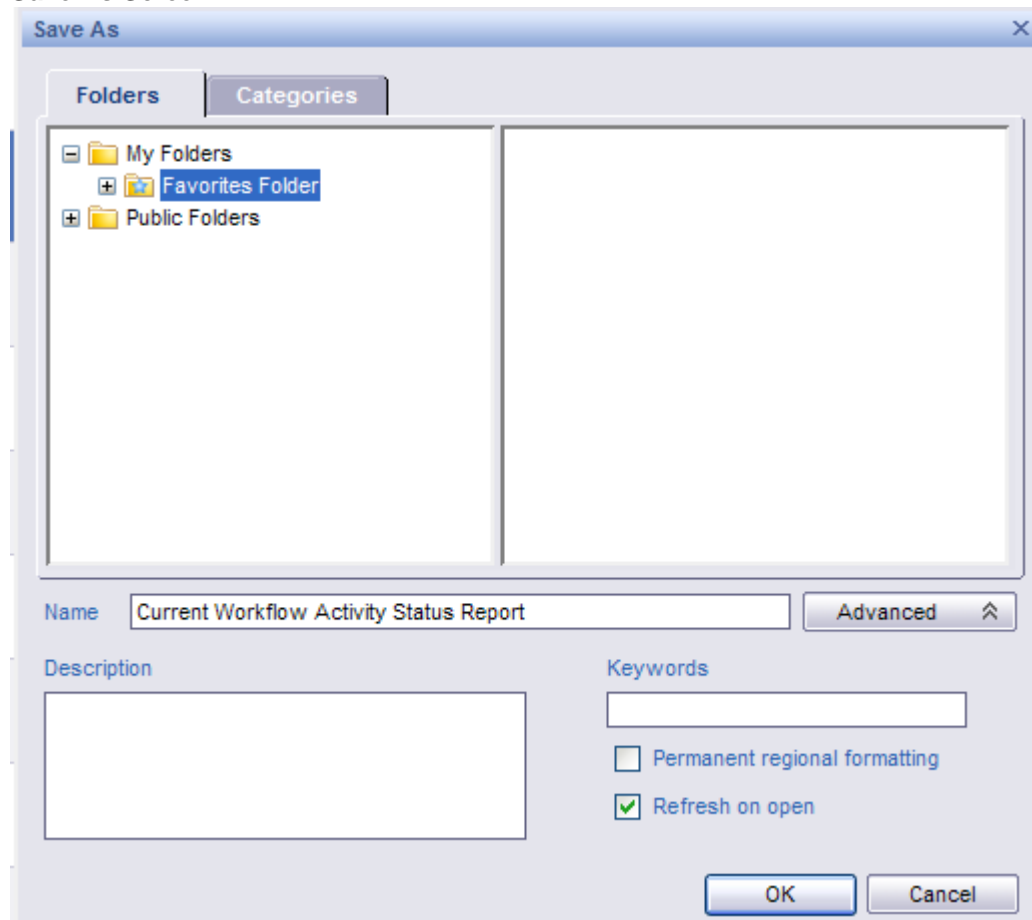
The report that displays is the same report in an Excel spreadsheet. The report can be manipulated as you would any spreadsheet.

Saving to My Folders

31. Navigate back to the MARS screen and click on the **Document** dropdown box, to save the report to your personal folder.



32. Click on **Save As** option.

Save As Screen



This new screen appears when you save a document to your personal folders.

The **Description** and **Keywords** boxes are optional fields. Add a description of the report. The description will appear with the title of the report in My Folders.

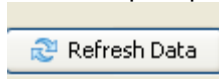
33. Check the box on the **Refresh on Open** checkbox to have the data automatically refresh each time you open the report. If this button is not checked, you will have to click the Refresh button each time you open the report to see the latest data.
34. Click on  My Folders to navigate to the folder to save the report.
35. Click on **Favorites Folder** link to highlight that this is the folder where you want the report saved.
36. Click on  to save the report to the Favorites Folder.

Modifying a Query

4. Click on **My Favorites** to view all of your personal reports.
38. Select the report you want to modify by clicking and highlighting the report
39. Click on the **Actions** dropdown menu and click on **Modify**


NOTE When you click on the Studies link in IE it will prompt you to run JAVA. Click Run and then click yes to run JAVA to complete the below steps.

40. When the prompt appears, confirm the Region is correct and click on

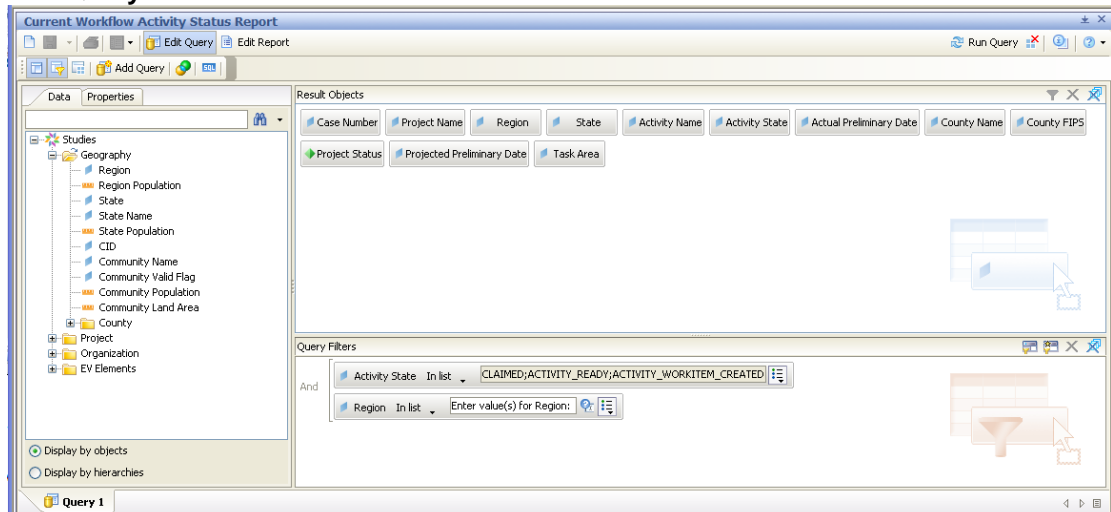


to view the report.

41. Click on  to hide the navigation panel to view more of the report on the screen.


42. Click on  to modify the report. This includes adding/deleting data elements and filters.

Edit Query Mode



43. We want to add new data elements to the report query. Navigate through the **Data** to find the desired data element(s) in the subfolders.
44. Drag and drop the new data element(s) to the Results Objects box.
45. In the simulation example, we want to run this report for only IL. Drag and drop the State data element under the Data tab to the Query Filters box.
46. Under the Query Filters field, click on the down arrow next to In List in the State box to see the list of filter options.
5. Click the dropdown box to select an option for adding a state from the list.




6. Click on  and select Values from List.

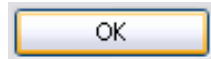
Other options: Choose **Constant** to manually enter in the correct value. You must enter the exact value for the system to provide query results. Choose **Prompt** to be prompted every time to add a value.

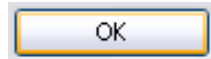
7. Click to highlight IL to set the filter to only include results for the state of Illinois.

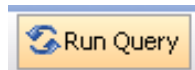


8. Click on  to add the number to the Value(s) Selected.

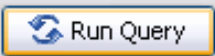
You can add multiple selections depending on how many states you want to include in your report results.



9. Click on  to set this filter.



10. Click on  to view report results with the new data elements and filter.

11. This report has a prompt set on Region. Each time we open this report we will be prompted to confirm or change the Region. Click on  to continue.

12. **** IMPORTANT**** Notice the new data elements are not yet included in the report results. You now have to drag and drop those data elements into the report.

13. If the report includes too many columns for your needs, click on a column title and drag and drop it back to the list of data elements to remove it from the report.


The other option to remove a column from the report is to click on the column title to highlight it, and then press the **Delete** key on your keyboard.

You can also move columns within the report by highlighting a column title and dragging and dropping it between two other columns.

14. Double click on any column name to change the column title.
15. Enter the new column title and hit the Enter key to save the entry.

- Click and drag the line between two columns to increase the width of the column to the left of the line.

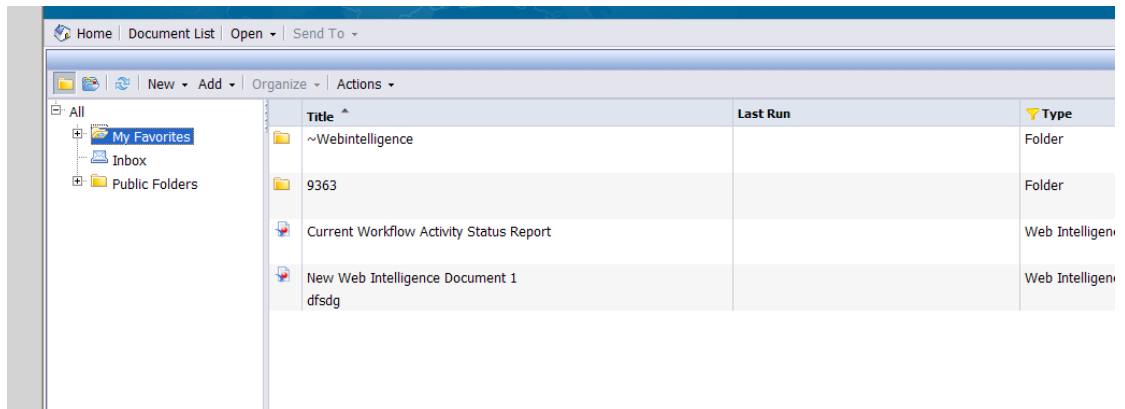


- Click on  to save all of the changes you have made to the report.

Schedule the Report for a Recurring Email

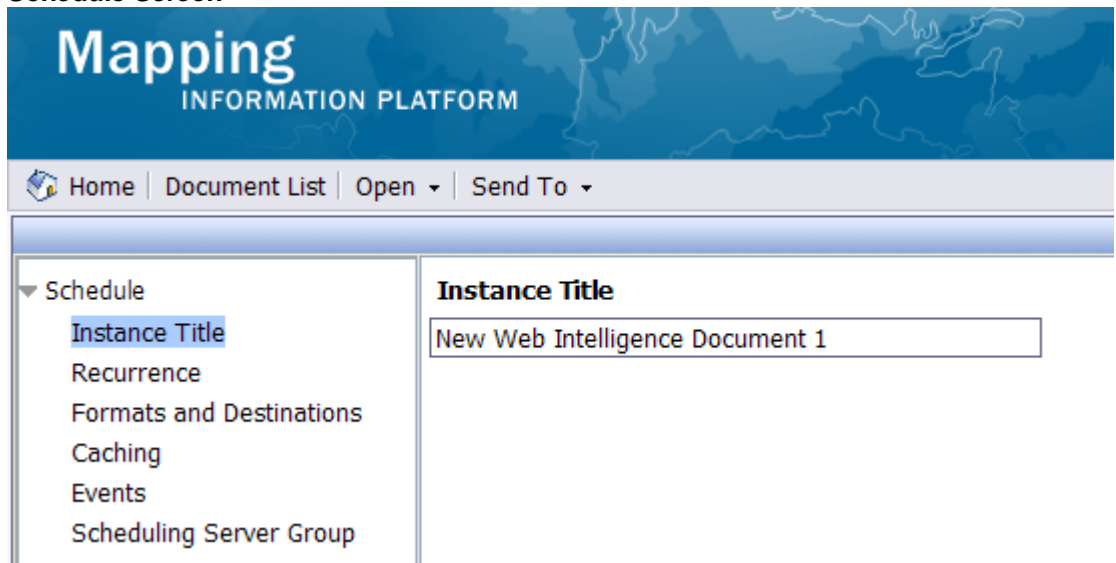
- On the MARS home screen, click on the **My Favorites** link to highlight that this is the folder where you want the report saved.
- Click the **My Favorites** link to view all of your personal reports.
- In the **My Favorites** screen, click on the report you want to schedule.

My Favorites Screen



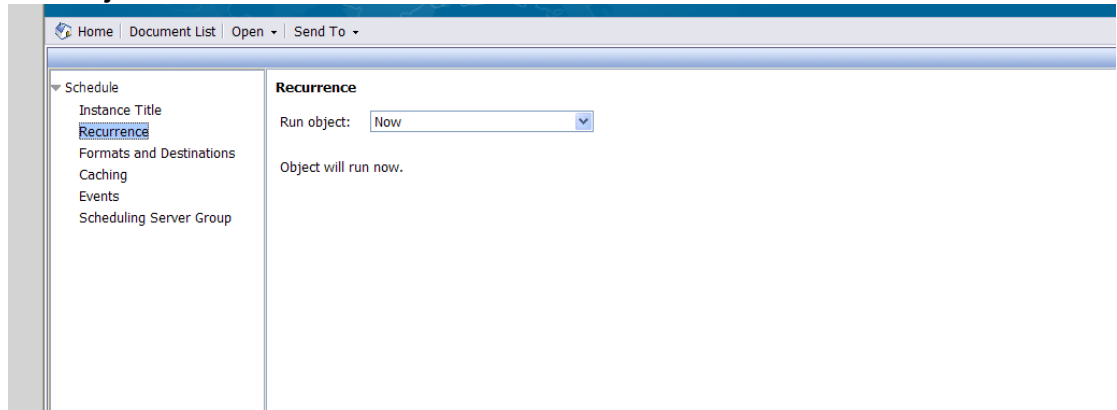
- Click on the **Actions** dropdown box
- Click the **Schedule** in the **Actions** dropdown menu and the schedule screen appears.

Schedule Screen



65. To select the Date/Time to send your report click on **Recurrence** in the left hand navigation.
66. Then in the **Run object** dropdown box select the frequency of when you would like the report to run.

Run Object Screen

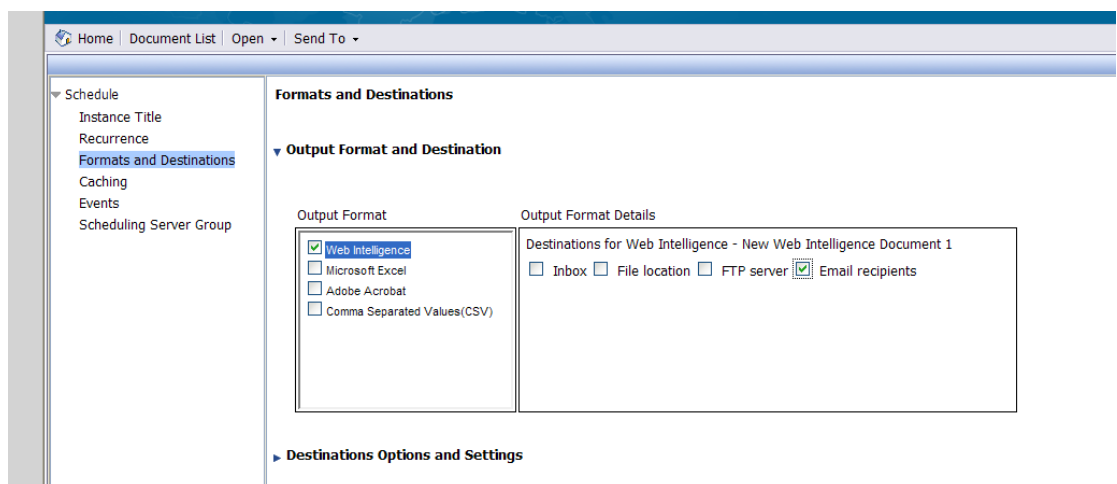


67. Click on the **Formats and Destinations** in the left hand navigation bar to choose the format and destination options.
68. Under **Output Format and Destination** check the box next to the format and destination you would like to send your report.

NOTE Always choose **Inbox** or **Email recipients**. **Default Enterprise location** is not an option we will use.

*When emailing a recipient, choose either Microsoft Excel or Adobe Acrobat.

*Do not select Web Intelligence if emailing the recipient. They will receive the link in their email, but the tool is not set up to work off of their email. Only select Web Intelligence if you select Inbox in the Destination dropdown box.



What is the difference between Inbox and Email recipients?

Inbox - This is not the user's email inbox, but the user's MARS inbox. Use this option to send reports to other MARS users. Sending to the MARS inbox as a Web Intelligence document allows the user to modify the data elements and filters.

Email recipients - This option can be used for sending reports to other users. The report will appear as an Excel or PDF attachment in the user's regular email box.

69. Under **Destinations Options and Settings**, uncheck , **Use the Job Server's defaults**.

The screenshot shows the 'Destinations Options and Settings' configuration window. On the left, a navigation pane lists 'Schedule', 'Instance Title', 'Recurrence', 'Formats and Destinations', 'Caching', 'Events', and 'Scheduling Server Group'. The main area is titled 'Formats and Destinations' and contains two sections: 'Output Format and Destination' and 'Destinations Options and Settings'. Under 'Destinations Options and Settings', there are two columns: 'Destinations for the output format' (with an 'Email recipients' field) and 'Options and Settings'. In 'Options and Settings', the checkbox 'Use the Job Server's defaults' is unchecked. Below it are input fields for 'From:', 'To:', 'Cc:', and 'Subject:'. To the right of these fields is an 'Add attachment' checkbox. Under 'Attachment:', there are two radio buttons: 'Automatically generated' (selected) and 'Specific name:' (with a dropdown menu). Below the radio buttons is an 'Add file extension' checkbox, which is checked. At the bottom of the 'Options and Settings' section is a 'Message:' field and a 'Cleanup instance after scheduling' checkbox, which is unchecked.

70. Complete the email fields to send the report to a user.

**** IMPORTANT**** The From: field must always be from a mapmodteam account. The To: field must always include at least one mapmodteam email address. You cannot email non-mapmodteam account users without also having a mapmodteam email listed in the To: field.

Another option to send a report to a non-mapmodteam user is to save the report to your computer and attach the report to a regular email message.

71. Under **Destinations Options and Setting**, click on the **Add Attachment** check box.


72. Check the **Specific name** radio button to add a name of the report to display in the email attachment.

If you select **Automatically generated** then the report name will be a random set of numbers and letters that appears in the user's attachment.

73. Keep the **Add file extension** box checked. This will automatically add the correct extension.

There are no settings you need to alter in the **Caching Options**, **Server Group**, **Events** options.

74. Click in the bottom right of the screen to schedule the email with the added features.

75. The report you just scheduled is being generated. Click  to see the new status. You can click the time/date link in MARS to open the report.

Results

Congratulations! You can now:

- Navigate to canned reports
- Save the report to your computer and My Folders
- Modify the query with new data elements and filters
- Schedule the report for a recurring email