

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

Navigation

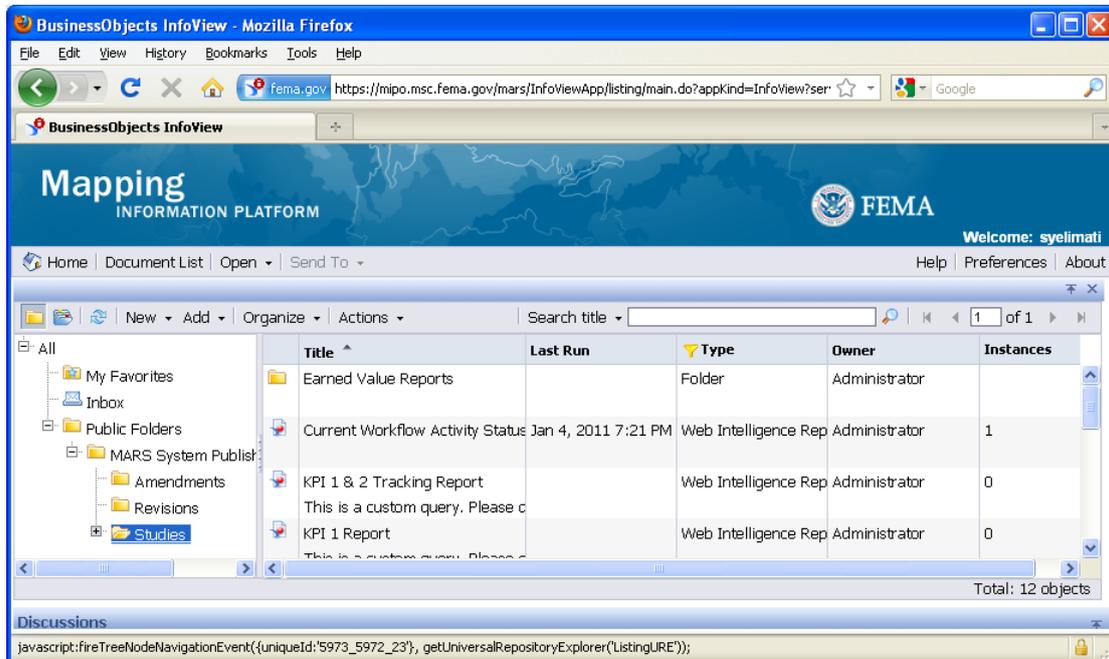
Via Menu Path	MIP Home → MARS tab then Log in to MARS
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1. Click on the  tab. You must be a registered user and logged into the MIP to see the MARS tab.
2. From the MARS landing page, click on **Access MARS** to launch MARS in a new window. The MIP window will remain open while you are in MARS. The MARS landing page has new look.



- Click on **Document List** to bring up a collection of folders used for housing reports. The Folders list shows My Favorites and Public Folders. Reports in Public Folders cannot be modified unless you save the report to My Favorites and modify the query from there.

Navigate to the Studies folder from Public Folders -> MARS System Published Reports to view a list of all Studies canned reports.



- Click to select and highlight the report you want save.
- Click on **Organize** dropdown arrow, or right click on report and select **Organize**.
- Select **Copy** as below. We will paste it little later in Step 11.

**** IMPORTANT **** Copy ... is the only option to use with this tool. The other options create shortcut links to My Folders that do not allow the user to edit or schedule the report.
- Click on **My Favorites** to view the subfolders listed. Click on New -> Folder or right-click on My Favorites and select New -> Folder.
- Enter a name in the New Folder field to add a new folder to My Favorites.
- Click **OK**
- The new folder is added to My Favorites. Click on + to open My Favorites and select the folder name.
- Click on **Organize** and select Paste to save the report to the folder. Alternatively right-click on folder and select Organize -> Paste.
- Click on the Report link to view the report you just saved.

13. Click the Studies link to return to the list of canned Studies reports.
14. Click on the report link to open the report. In this simulation, we chose the **Current Workflow Activity Status Report**.
15. 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.
16. 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.

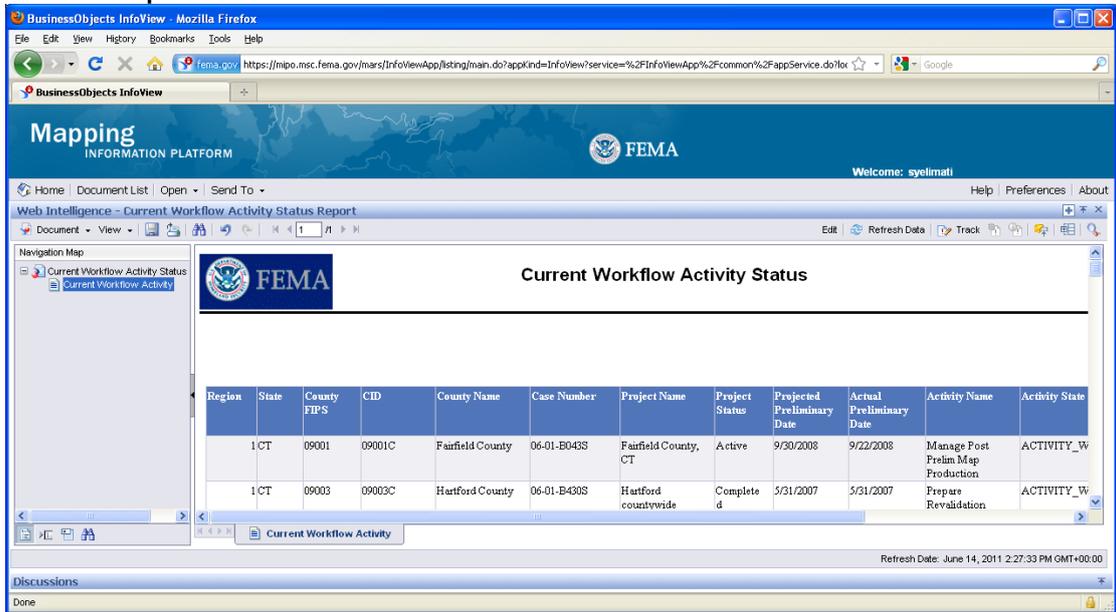
17. Remove the Region you don't want included in the report. Click to highlight the number.

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

19. Click on .

20. Click on  to hide the folder navigation panel to display more of the report.

Report View

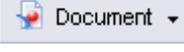


Region	State	County FIPS	CID	County Name	Case Number	Project Name	Project Status	Projected Preliminary Date	Actual Preliminary Date	Activity Name	Activity State
1	CT	09001	09001C	Fairfield County	06-01-B043S	Fairfield County, CT	Active	9/30/2008	9/22/2008	Manage Post Prelim Map Production	ACTIVITY_W
1	CT	09003	09003C	Hartford County	06-01-B430S	Hartford countywide	Complete	5/31/2007	5/31/2007	Prepare Revalidation	ACTIVITY_W

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

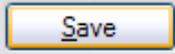
22. Click on  arrow to move to the last page of the report. This also displays how many pages are in the report.

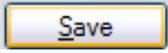
23. Click on  to the first page of the report.

24. Click the  dropdown arrow 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.

25. Highlight dropdown "Save to my computer as" and select "Excel" dropdown to save the report into an Excel spreadsheet on your computer.

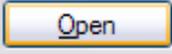
26. Select the option to  on the File Download screen.

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

28. Open a new 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.

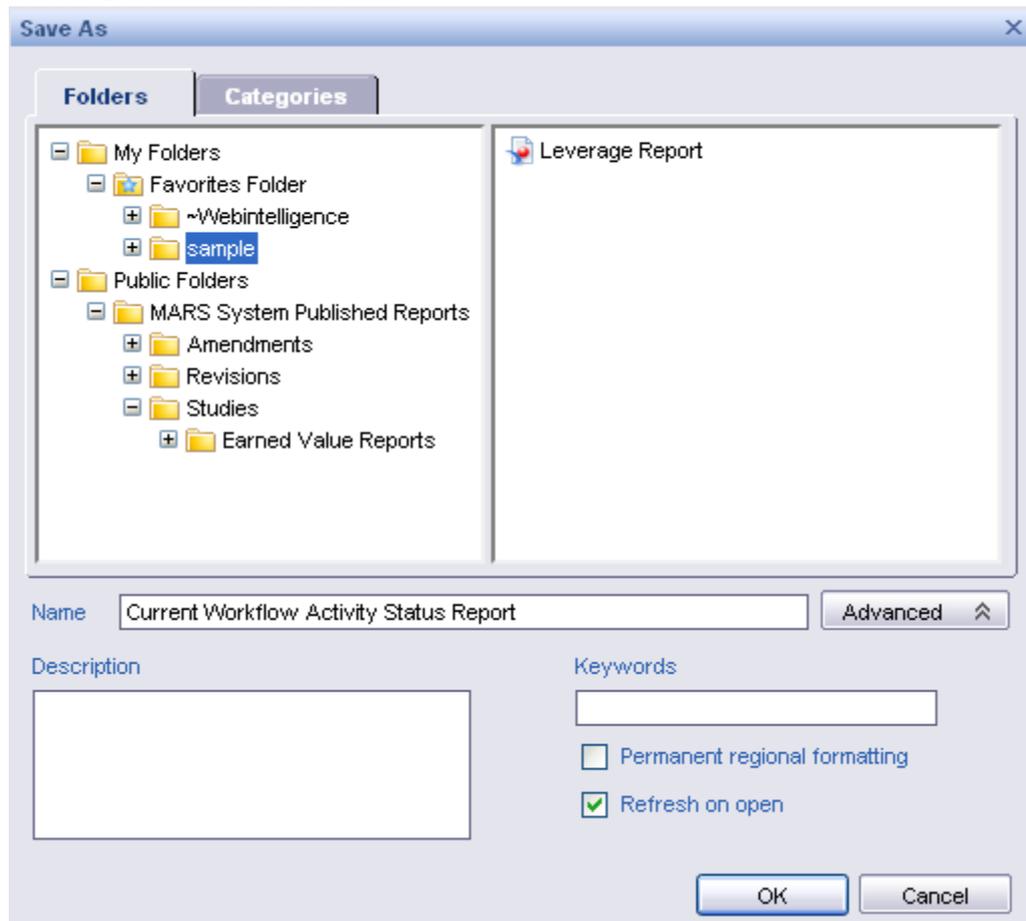
29. Click on  on the File Download screen.

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

30. Click on the  dropdown box and save the report to your personal folder.

31. Click on .

Save Document Screen



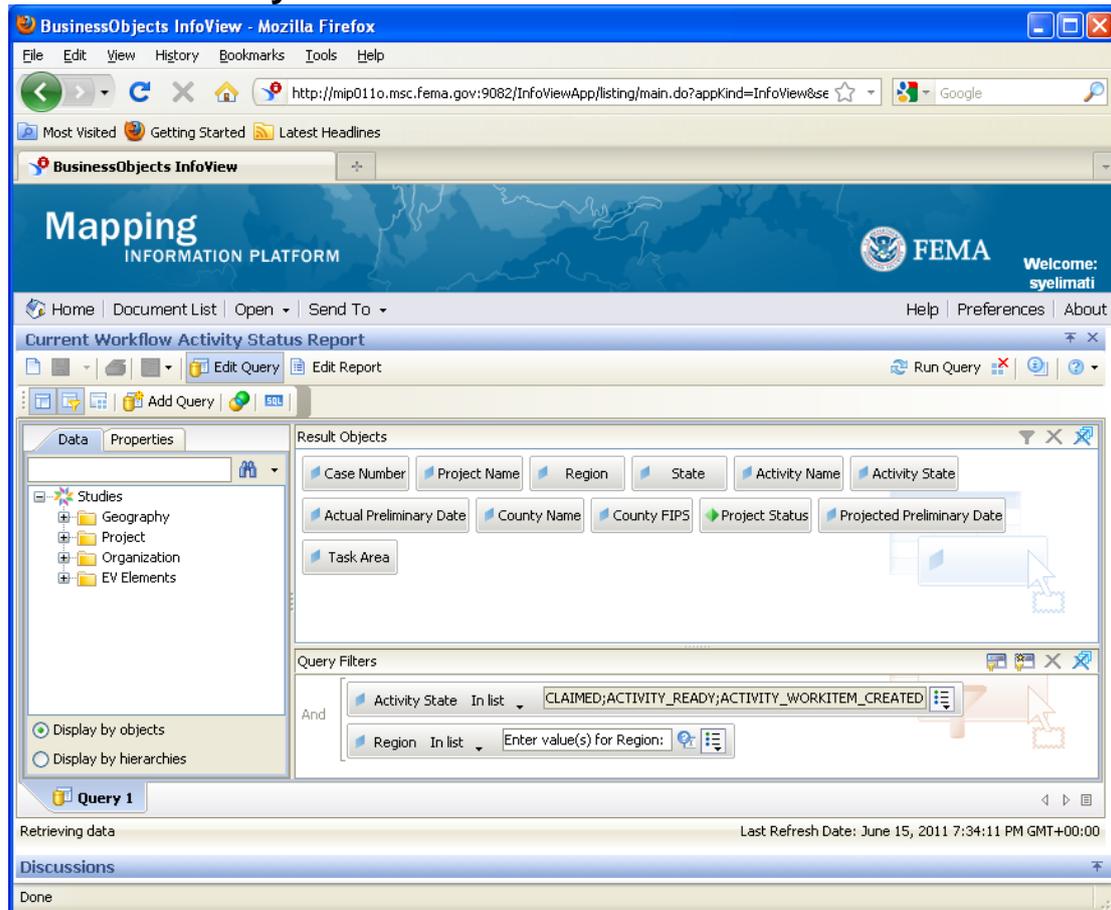
This new screen appears when you save a document to your personal folders.

This **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.

32. Click 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.
33. Click on  My Folders to navigate to the folder to save the report.
34. Click on  My Favorites link to highlight that this is the folder where you want the report saved.
35. Click on  to save the report to the Favorites folder.
36. Select **Document List**
37. Click on  My Favorites to view all of your personal reports.

38. Click and highlight a report, then use the **Actions** drop down menu to navigate to the **Modify** option. Use this link to edit the query.
39. When the prompt appears, add the correct Region(s) and click on “Refresh Data” to view the report.
40. Click on **Edit Query** to modify the report. This includes adding/deleting data elements and filters.

Edit Query Mode

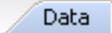


41. We want to add new data elements to the report query. Navigate through the **Data** tab to find the desired data element(s) in the subfolders.
42. Drag and drop the new data element(s) to the Results Objects box.
43. In the simulation example, we want to run this report for only IL. Drag and drop the State data element to the Query Filters box.
44. Click the **In list** arrow to see the list of filter options.
45. Enter IL into the **In List** option to yield results related to specified to your needs.

46. Click the  box next to where you typed in IL and select from:
- Value(s) from list** to begin typing in a state abbreviation.
 - Constant** to manually enter in the correct value. You must enter the exact value for the system to provide query results.
 - Prompt** to be prompted every time to add a value.

For this report we may type in "IL" and select **Constant**.

47. Click on  and select the appropriate Region(s) to view report results with the new data elements and filter.

48. **** 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 from the lefthand  tab .

49. 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.

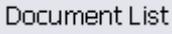
You can also move columns within the report by highlighting a column title and dragging and dropping it between two other columns.

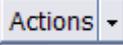
50. Double click on any column name to change the column title.

51. Enter the new column title and hit enter to save the entry.

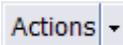
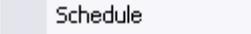
52. Click and drag the line between two columns to increase the width of the column to the left of the line.

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

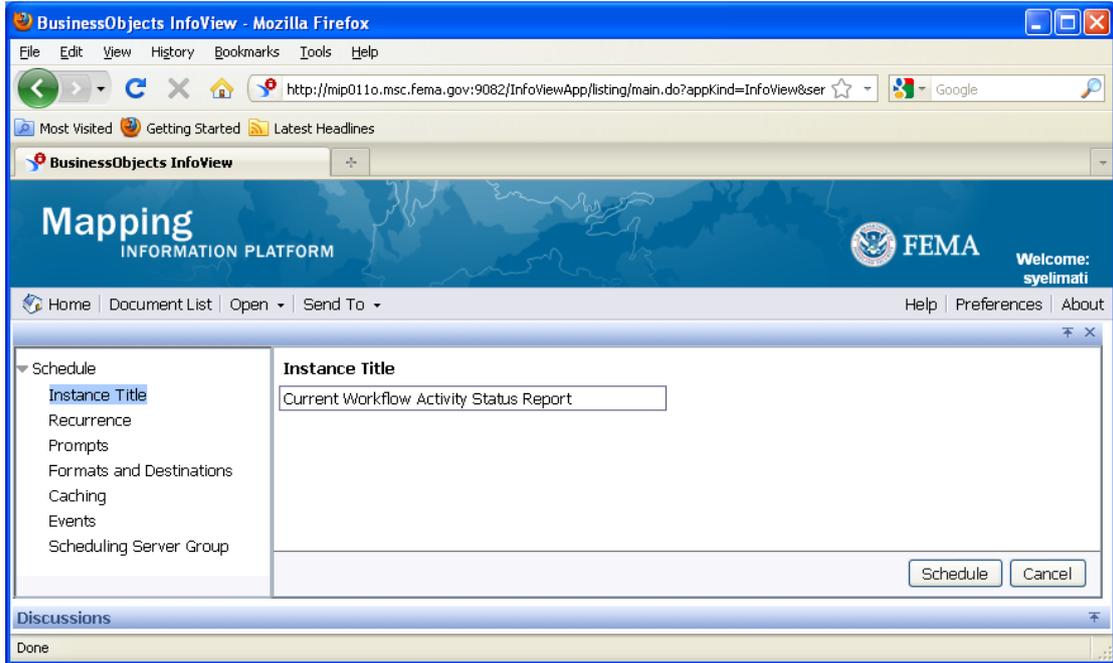
54. Return to the  and click on the **Favorites** link to view your personal saved reports.

55. Highlight the selected report, click on  and select the **Properties** link to view more information on the report.

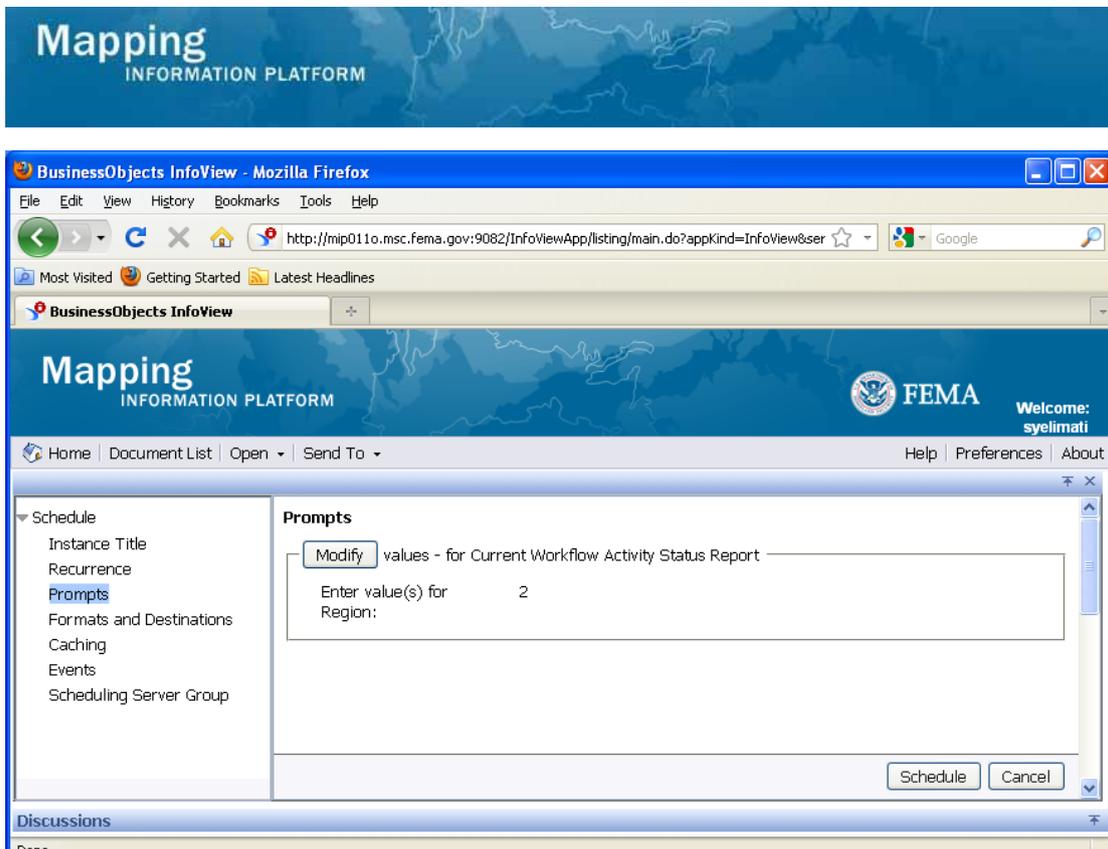
56. Click on  to return to the previous screen.

57. Highlight the selected report, Click the  drop down menu and choose  to set parameters for sending the report to another user.

Schedule Screen



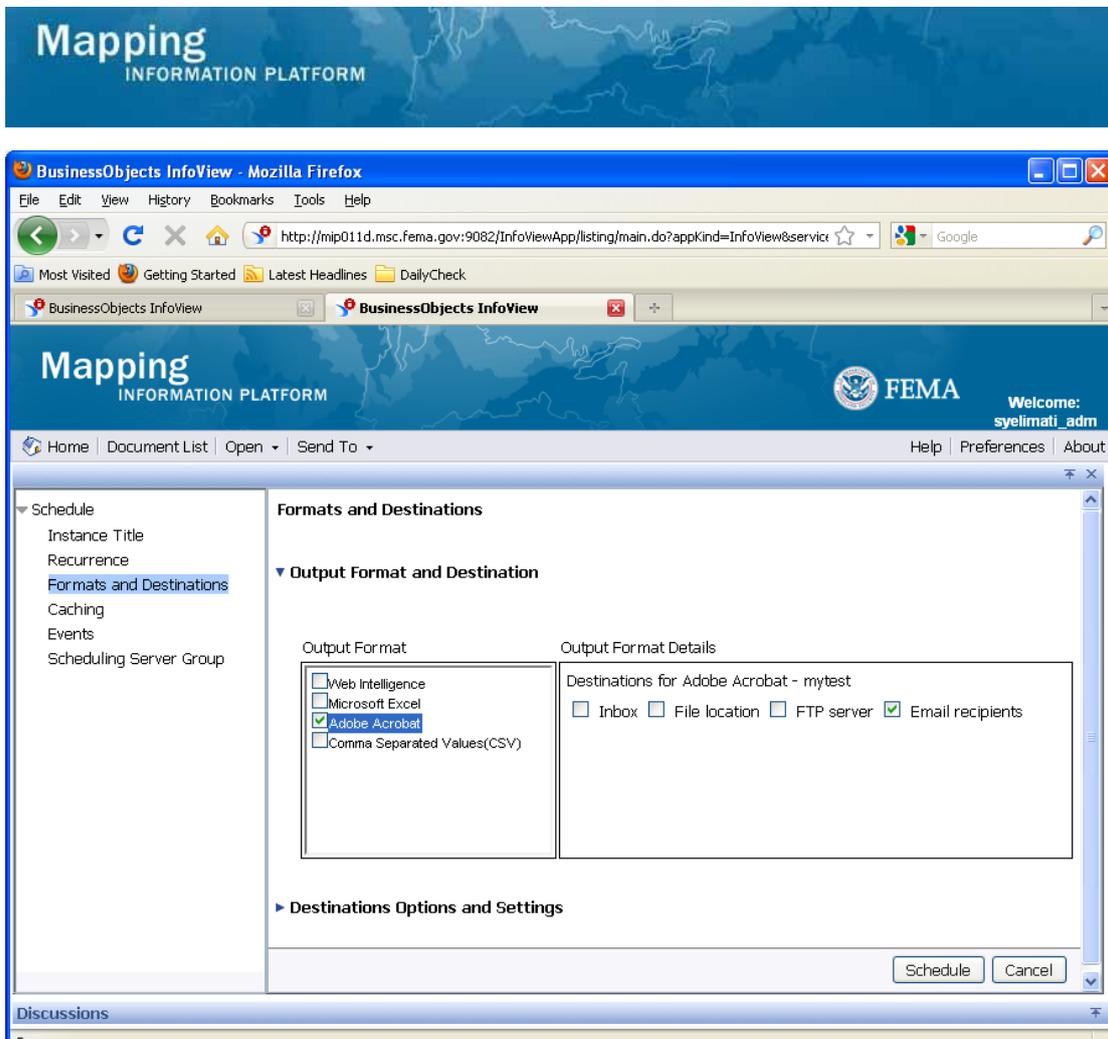
58. Insert the title for the report sending process in the **Instance Title** field. Click on the **Recurrence** link to open the **Run object** options for scheduling the report.
59. For this example, we selected Weekly from the **Run object** dropdown box. Select the day, **Start Time** and **End Time**. Click the calendar button to set a new end date. You can also manually enter a date in the date field using the correct format.
60. Click on **Prompts** and click on **Modify** to open and select prompts and apply to all scheduled reports. If there are prompts involved you may change them in **Prompts** section. If not involved then it will not be visible.



61. Click on **Formats and Destinations** to open and select the **Output Format** options. We want to add an attachment, but we cannot do that until we choose the format type. In the **Formats and Destinations** section, select the **Output Format and Destination** check-boxes to choose which **Output Format** to include as an attachment.

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.



62. While still in **Formats and Destinations**, select the **Destinations for Web Intelligence** checkboxes. Always choose **Inbox** or **Email recipients**.

What is the difference between Inbox and Email recipients?

Inbox - This is not the user's email inbox, but the user's MARS inbox (highlighted in red in My Folders). 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.

63. Click the **Destination Options and Settings** link to open and select a destination

64. Uncheck , **Use the Job Server's defaults**. Under the **Destinations Options and Settings**, complete the email fields to send the report to a user.

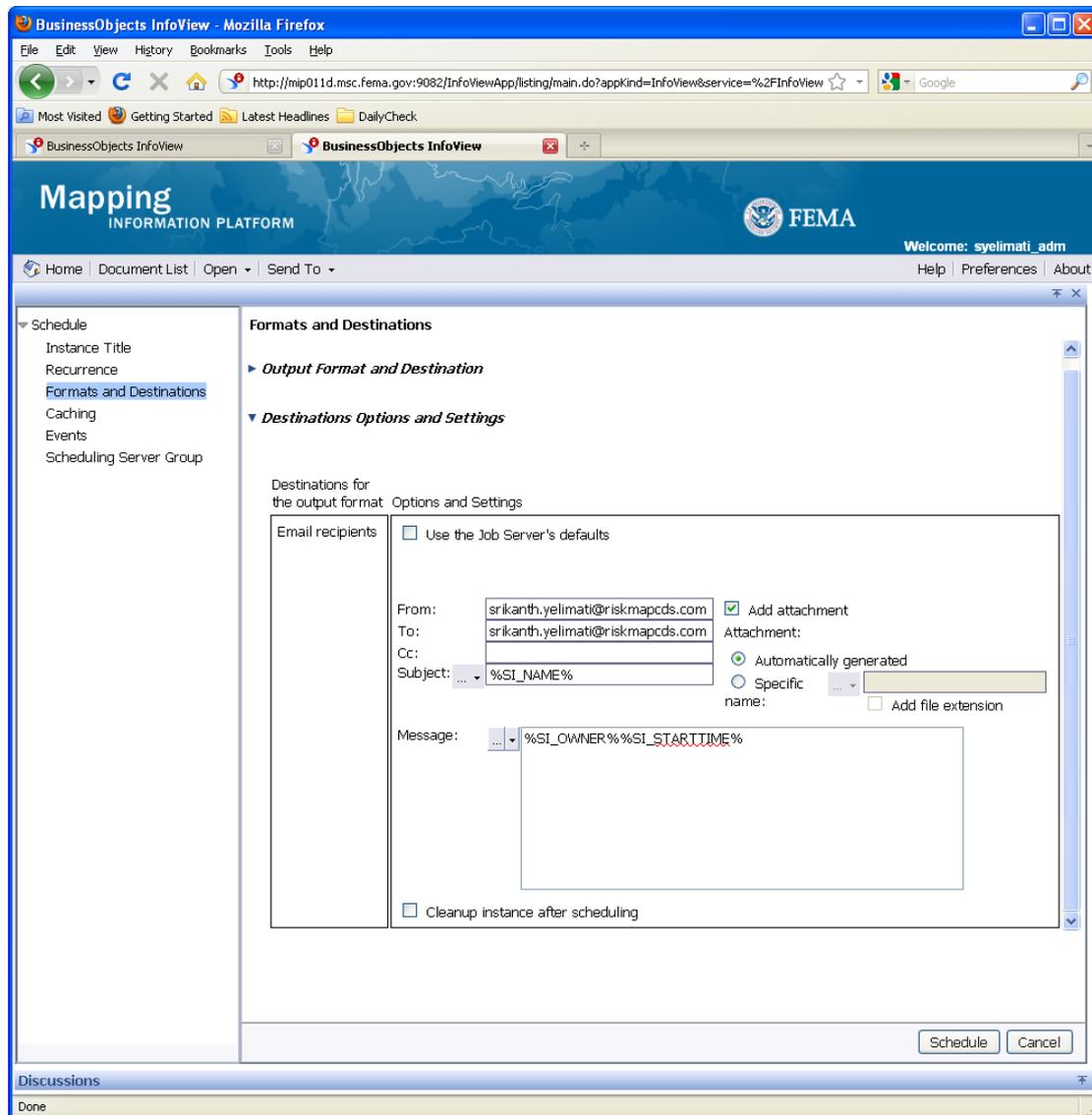
Another option to send a report is to save the report to your computer and attach the report to a regular email message.

645. Click the **Add Attachment** checkbox.

Subject, (File)Name and Message support placeholder dropdowns which you may use to compose custom titles and messages with generic information like:

Subjects : <Title>, <ID>, <Owner>, <Date and Time>, <Email Address>

Message: Above plus 2 more <User Full Name>, <Viewer Hyperlink>



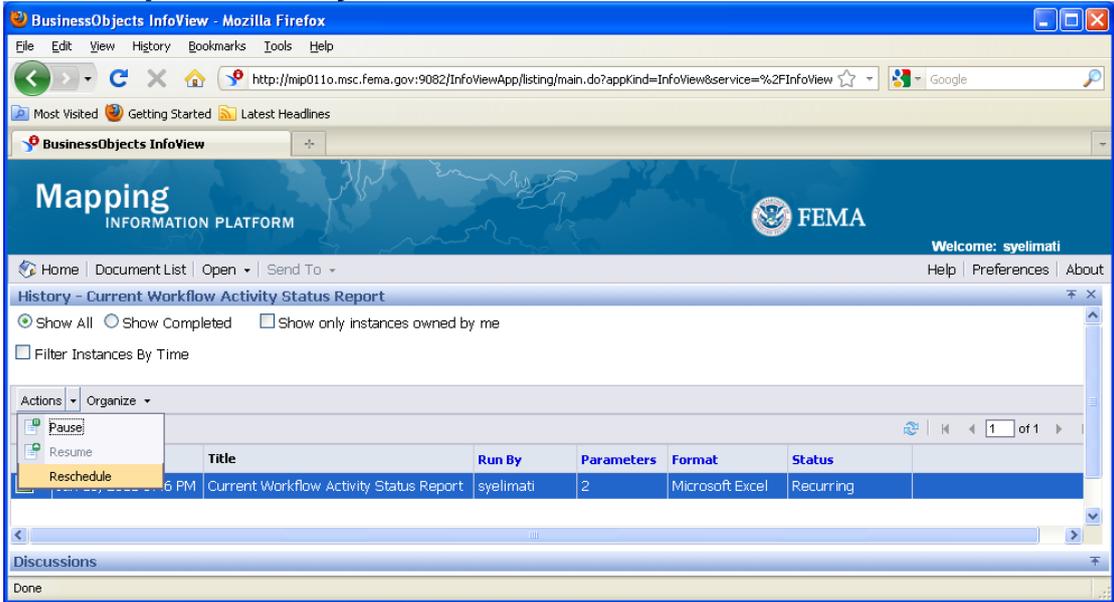
Keep the **Add file extension** box checked. This will automatically add the correct extension.

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

Click on **Schedule** to schedule the email with the added features.

65. If you decide to change the end date of the scheduled report, click the **Actions -> Reschedule** link to alter the settings.

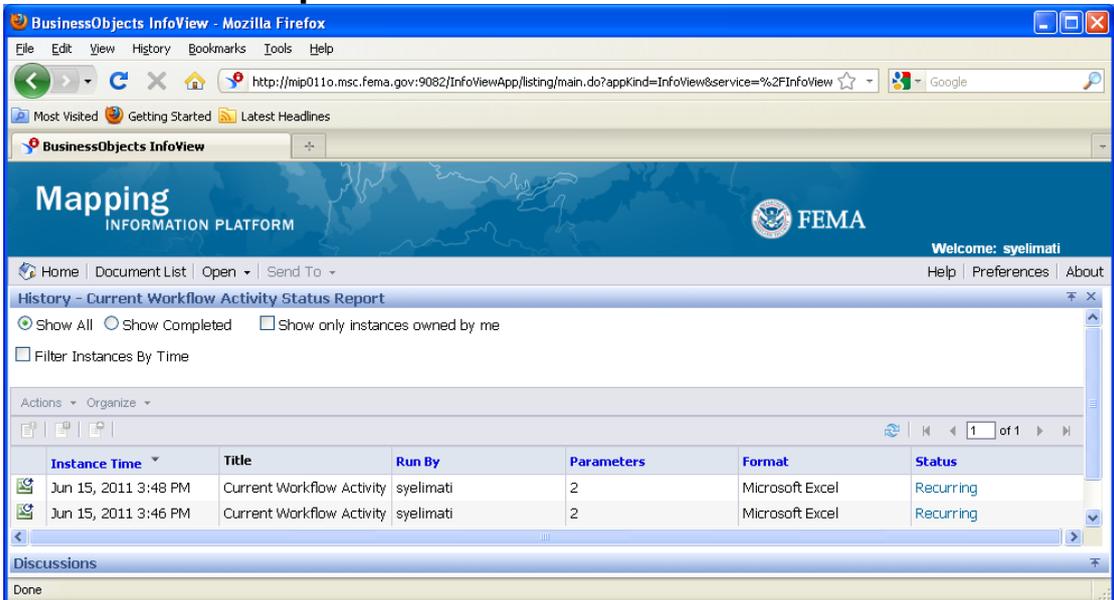
Report History



66. After rescheduling the instance, the **Favorites** folder now displays two similar reports. When we rescheduled the report it created a new instance. If we leave both on this list then the email recipient will receive both reports. Delete the earlier instance.

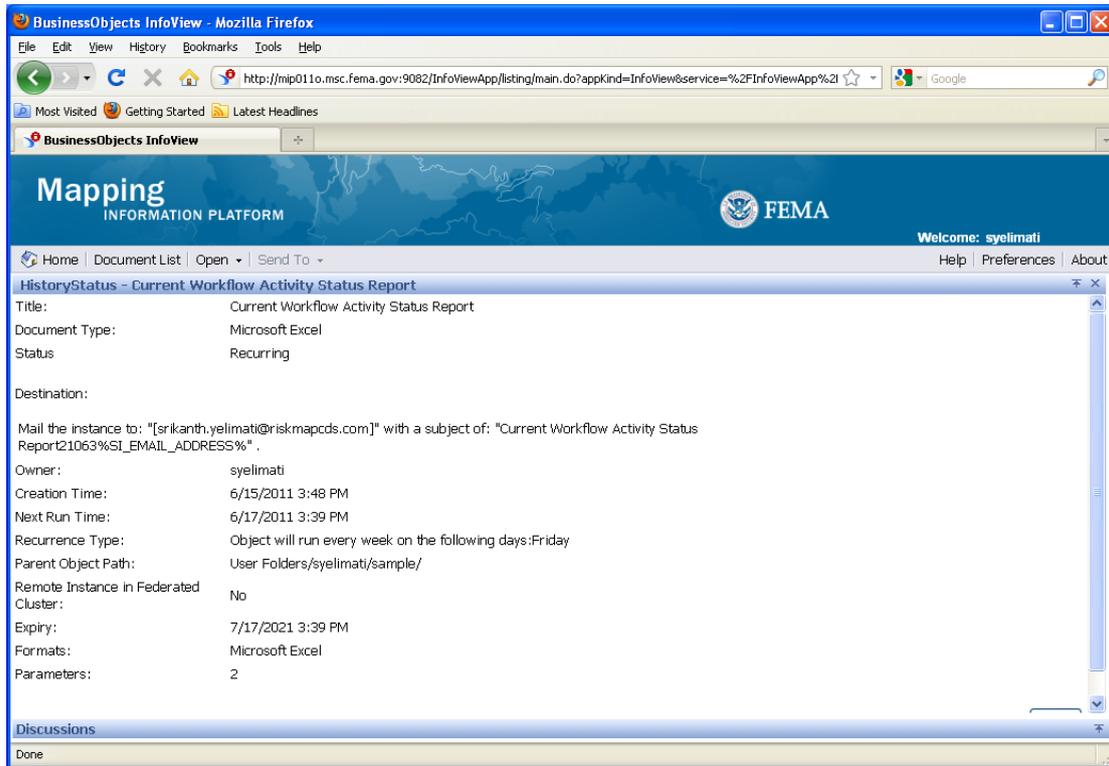
Click the checkbox to select which instance to delete.

Delete a Report



67. Click on the **Organize** drop-down menu and select **Delete** to remove the selected instance. Click the **Recurring** link to view the status and settings for this scheduled instance.

History Screen



This screen provides details of where and when the report will be run and emailed.

68. Click on [Back](#) to return to the previous page.

Results
<p>Congratulations! You can now:</p> <ul style="list-style-type: none">• 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