Mapping
INFORMATION PLATFORM

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

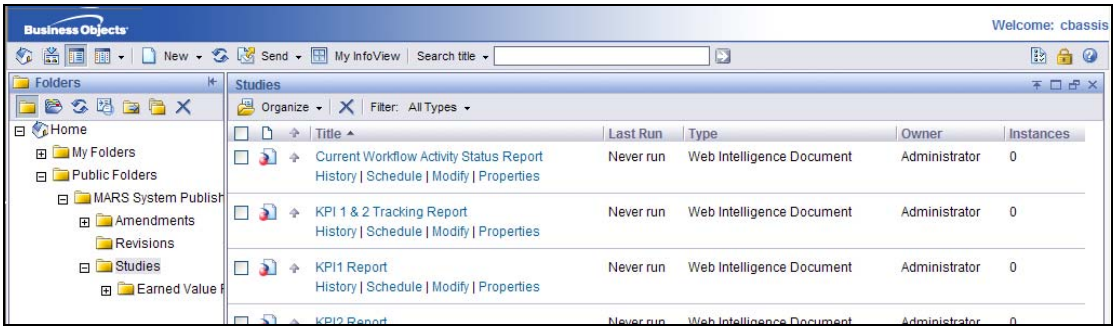
Via Menu Path	**MIP Home ➔ MARS tab** **then** **Log in to MARS**

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 Log in to MARS to launch MARS in a new window.

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

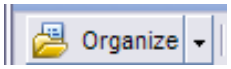
MIP Home



3. The Folders list shows My Folders and Public Folders. Reports in Public Folders cannot be modified unless you save the report to My Folders and modify the query from there.

Click on the Studies link to view a list of all Studies canned reports.

4. Click the check box next to the report you want save.

5. Click on: 

dropdown arrow.

6. Select

** IMPORTANT ** Copy to New Folder... 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.

7. Click the + next to My Folders to view the subfolders listed.

8. Enter a name in the New Folder field to add a new folder to My Folders.

9. Click on:

10. The new folder is added to My Folders. Click to highlight the folder name to indicate where to save the report.

11. Click on:

to save the report to the folder.

12. Click on the Leverage 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.

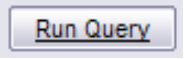
16. Click the arrows to add the Region.

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 

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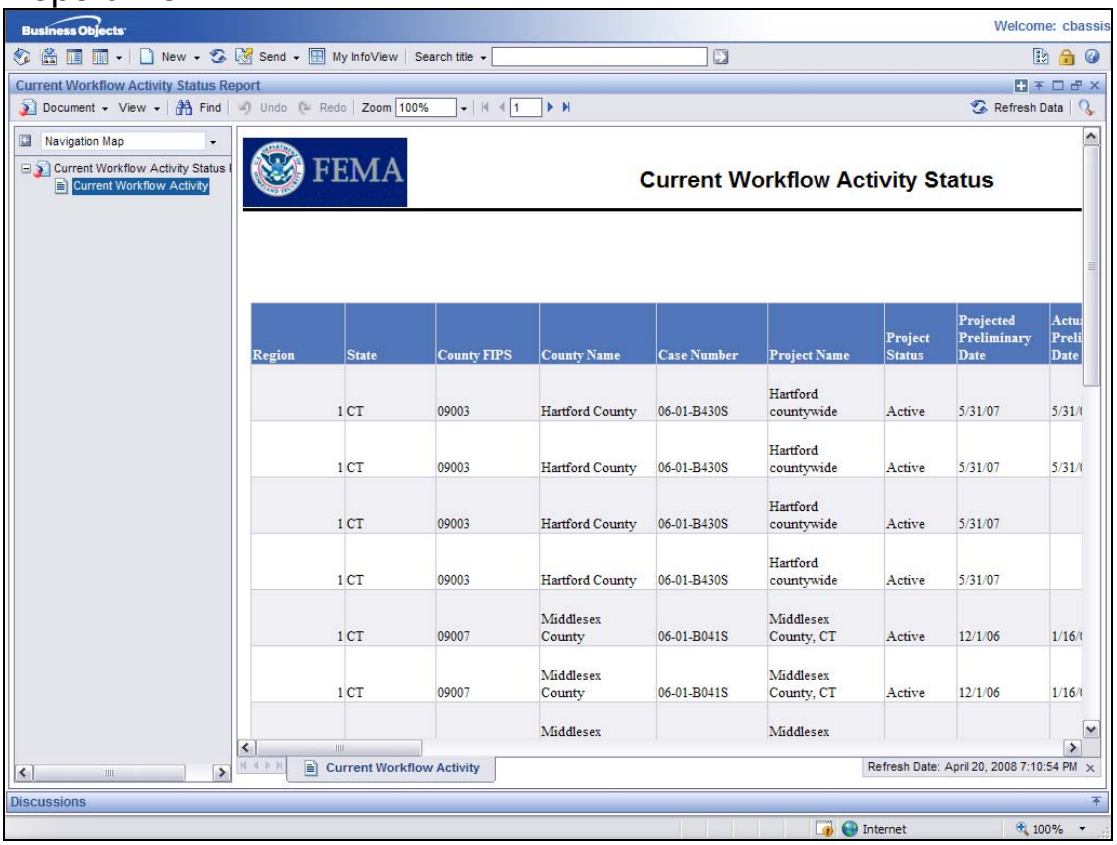
20. Click on
to hide the folder navigation panel to display more of the report.

Report View



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.

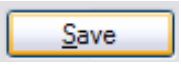
23. Click on to the first page of the report.

24. Click the **Document** dropdown arrow for options to save the report.

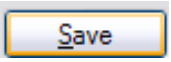
NOTE: Depending on your security settings, a pop up blocker may appear when you try to download a file to your computer. To avoid a pop up blocker appearing on your screen, hold down the Ctrl key when you click on the dropdown box. Continue to hold down the Ctrl key until the Save As screen.

25. Click on

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

26. Click on 

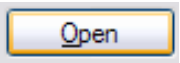
on the File Download screen.

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

28. 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.

29. Click on 

on the File Download screen.

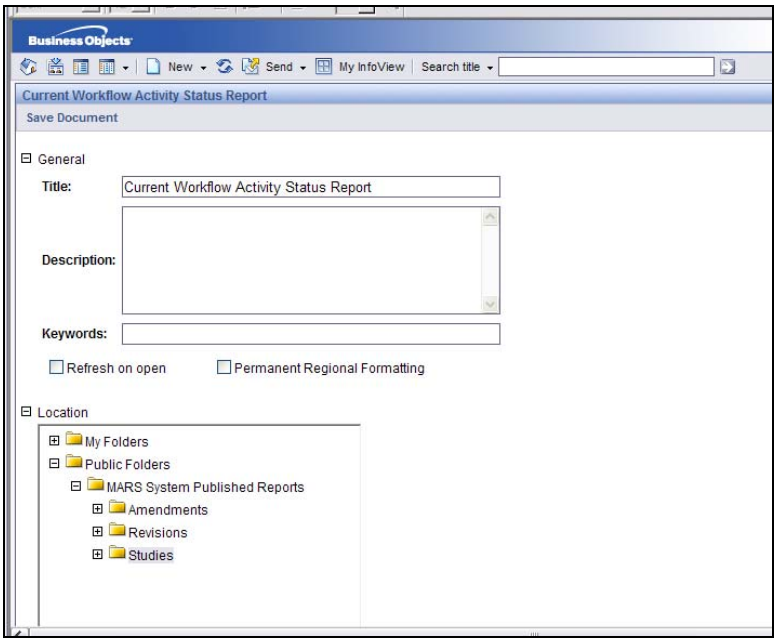
The report that displays is the same report in an Excel spreadsheet. The report can be manipulated as you would any spreadsheet.

30. Click on the **Document** dropdown box, to save the report to your personal folder.

31. Click on

option.

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 Favorites link to highlight that this is the folder where you want the report saved.

35. Click on OK to save the report to the Favorites folder.

36. Click on , the toggle navigation button, to unhide the folder navigation panel.

37. Click on Favorites to view all of your personal reports.

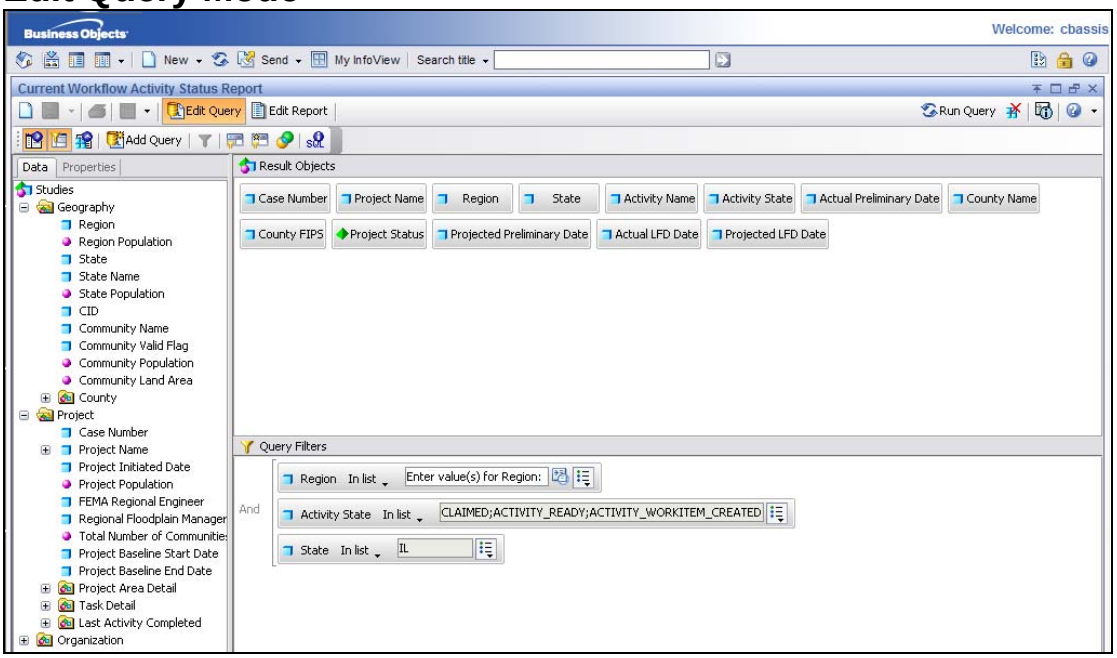
38. Click on Modify link to edit the query.

39. When the prompt appears, confirm the Region is correct and click on Run Query to view the report.

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

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

Edit Query Mode

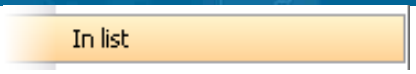


42. We want to add new data elements to the report query. Navigate through the **Data** to find the desired data element(s) in the subfolders.

43. Drag and drop the new data element(s) to the Results Objects box.

44. 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.

45. Click the dropdown box to see the list of filter options.

46. Click on 

to select a value from a list.

47. Click the dropdown box to select an option for adding a state from the list.

48. Click on

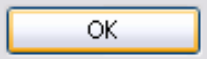
.

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.

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

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

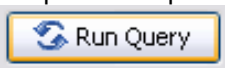
You can add multiple selections depending on how many states you want to include in your report results.

51. Click on 

to set this filter.

52. Click on

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

53. 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.

54. **** 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.

55. 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.

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

57. Enter the new column title and click on to save the entry.

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

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

60. Click , the toggle navigation button, to unhide the folder navigation panel.

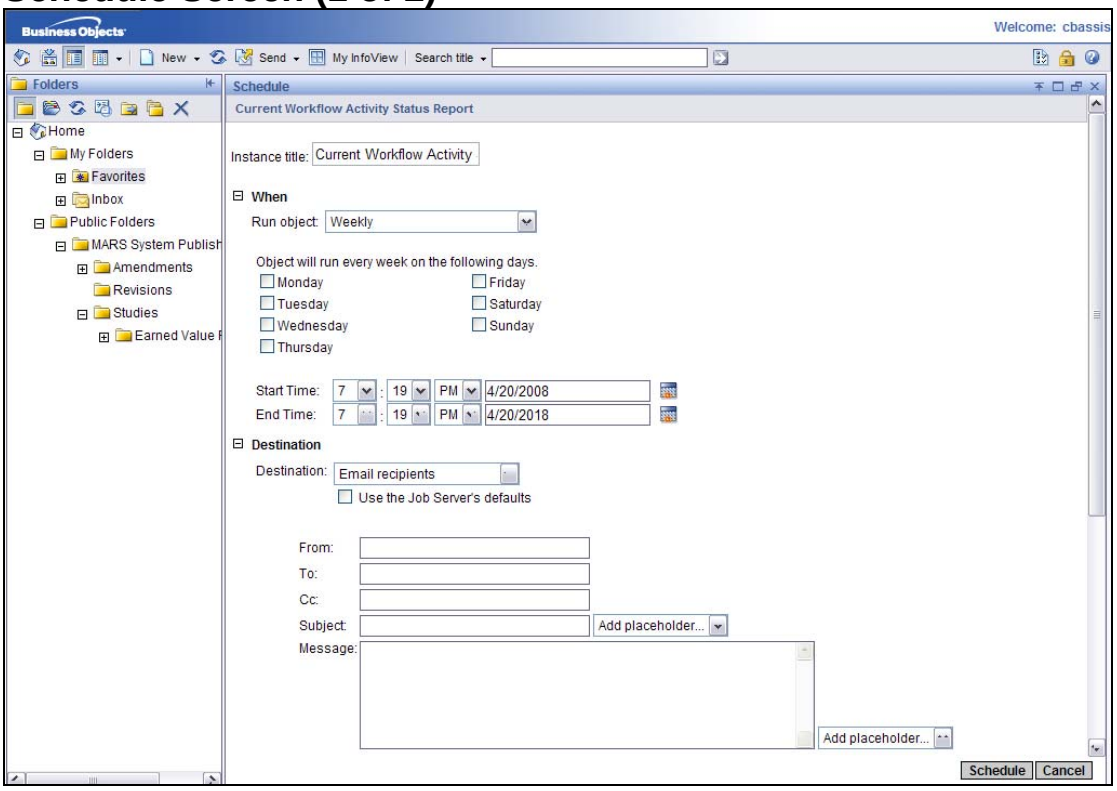
61. Click on the **Favorites** link to view your personal saved reports.

62. Click on the **Properties** link to view more information on the report.

63. Click on OK to return to the previous screen.

64. Click the **Schedule** link to set parameters for sending the report to another user.

Schedule Screen (1 of 2)



65. Click on the + to open the **When** options. Click the **Run object** dropdown to select when to schedule the report.

66. For this example, we select Weekly from the **Run** object dropdown box. Enter the day, **Start Time** and **End Time**.

67. Click the calendar widget to set a new end date.

You can also manually enter a date in the date field using the correct format.

68. Click on ⊞ to open the **Destination** options.

69. Click the dropdown box to select a destination.

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

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.

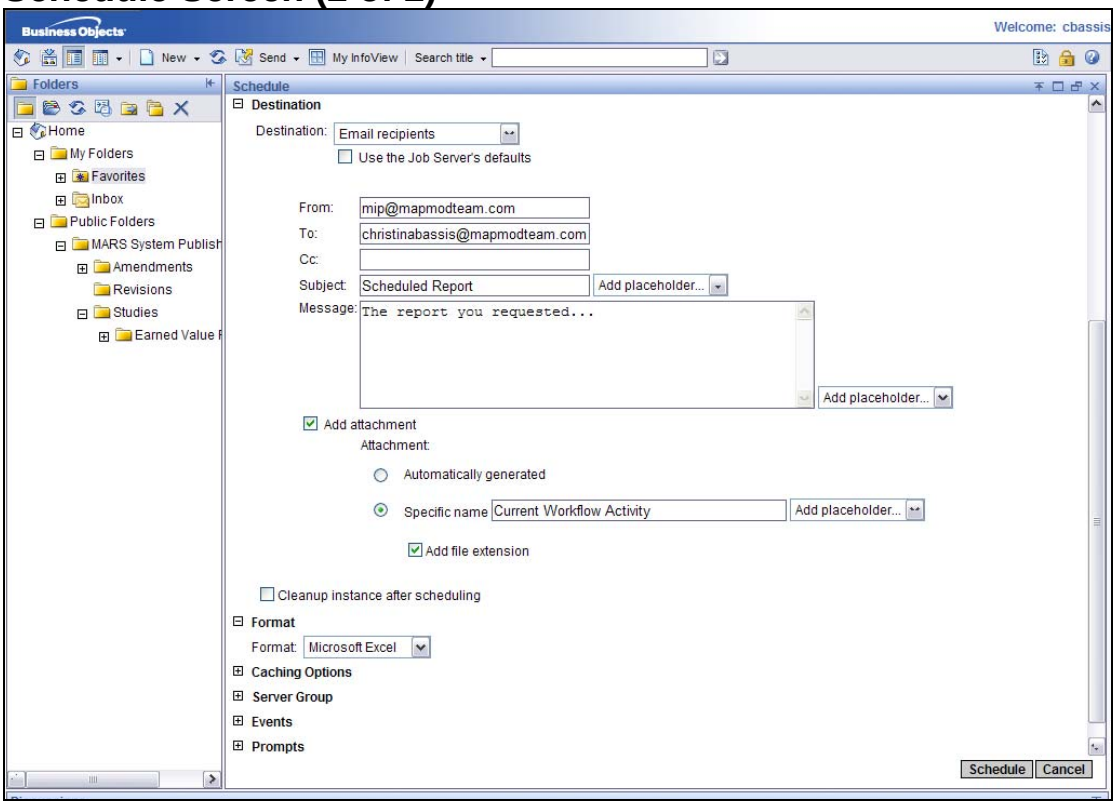
71. Uncheck , **Use the Job Server's defaults**.

72. Complete the fields to send the report to a user.

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

73. We want to add an attachment, but we cannot do that until we choose the format type. Click on to choose a **Format**.

Schedule Screen (2 of 2)



74. Click the **Format** dropdown box to choose which format to include as an attachment.

75. 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

76. Click the **Add attachment** check box.

77. Click the **Specific name** radio button to add a name of the report to display in the email attachment. Type in the name of the report to appear in the email.

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

78. **Add placeholder** provides options for adding additional information onto the report name. These options include Title, Date/Time, etc.

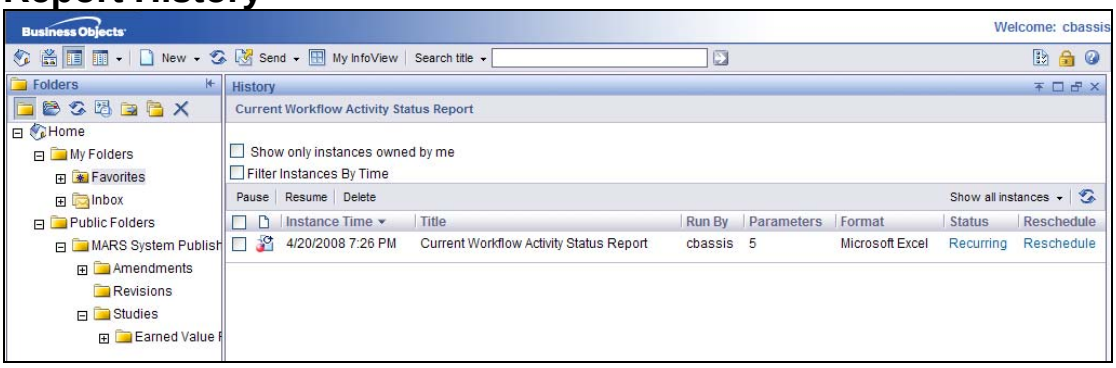
Keep the **Add file extension** box checked. This will automatically add the correct extension.

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

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

79. You decide to change the end date of the scheduled report. Click the **Reschedule** link to alter the settings.

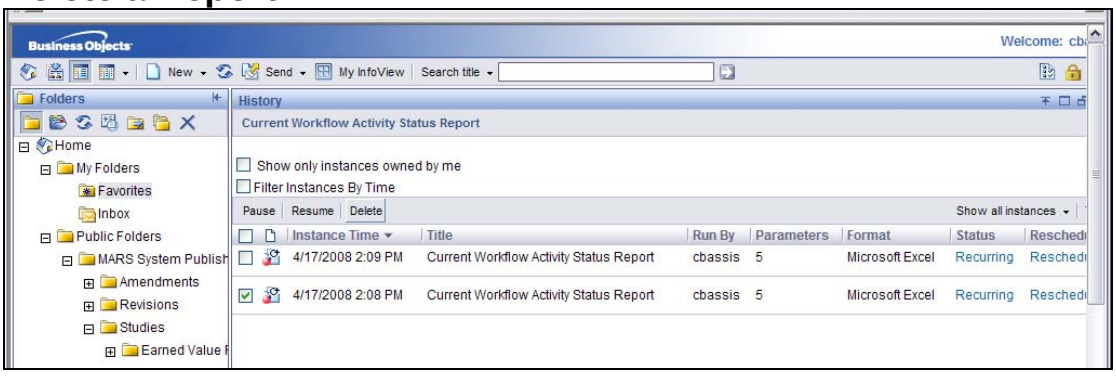
Report History



80. 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

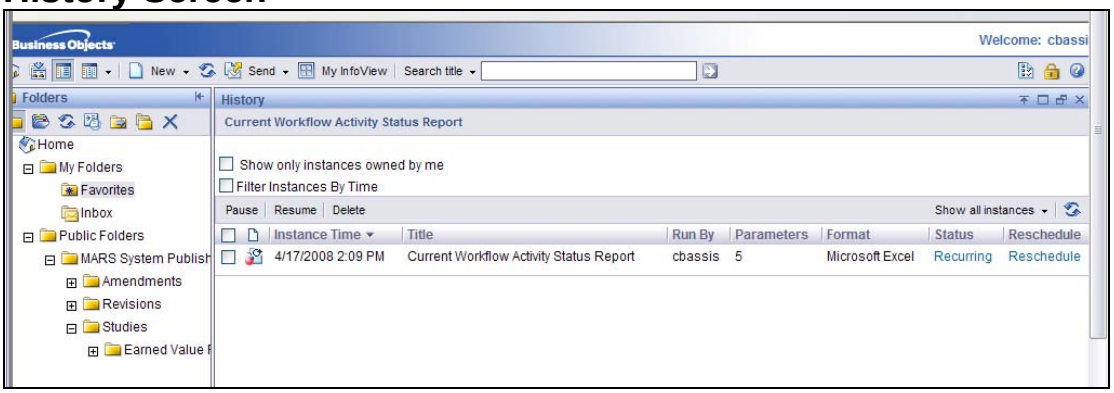


81. Click on Delete to remove the selected instance.

82. Click the **Recurring** link to view the status and settings for this scheduled instance.

83. Click on Back to return to the previous page.

History Screen



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

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