MARS - Create New Report
Work Instruction

Purpose

This work instruction is used to:
- Create and format a new report
- Modify the query with new data elements
- Save the report to My Folders
- Schedule the report to be sent in an email

Prerequisites

- User must be a registered MARS user

- Log into the MIP with your user name and password

Create and Format a New Report

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 in the background while you are in MARS.

3. From the MARS home page click on Document List in the top navigation toolbar

4. Click on the New ▾ dropdown box to create a new report.

5. Select **Web Intelligence Document**.
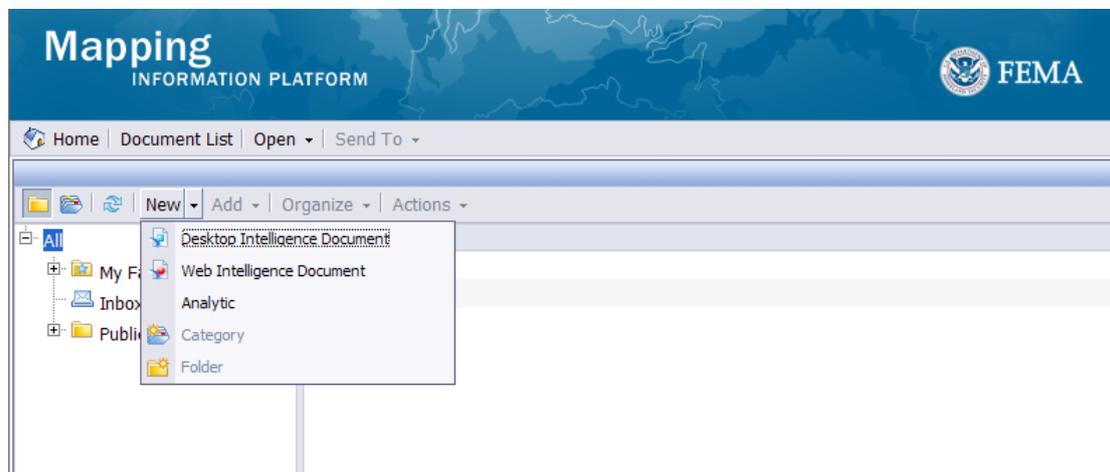
6. Select the universe (Amendments, Revisions or Studies) in which you want to create a report. You can only select one universe at a time. Once you select a universe, you will only see data elements related to that universe.

Click on the **Studies** link.

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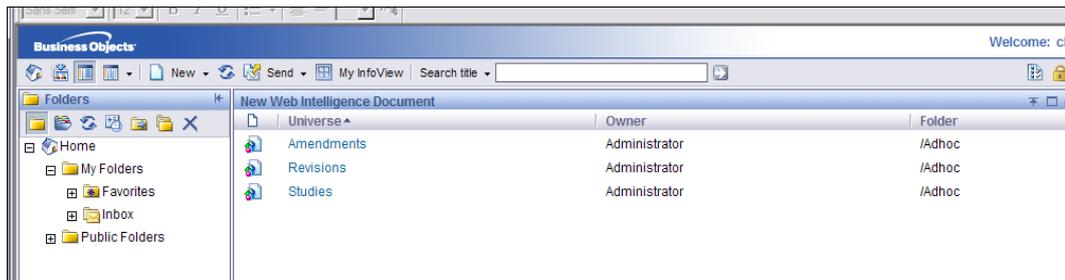
NOTE When you click on the Studies link in IE it will prompt you to run JAVA. Click Run and then click yes to run JAVA to complete the below steps.

Modify the Query with New Data Elements

7. Navigate through the **Data** elements on the left hand side under the **Data** tab and drag and drop the data elements into the **Results Objects** box that you want to include in the report.

IMPORTANT Notice that when you drop data element marked with a green pyramid, it will always bring over the parent data element (in this example, Project Status and Project Name).
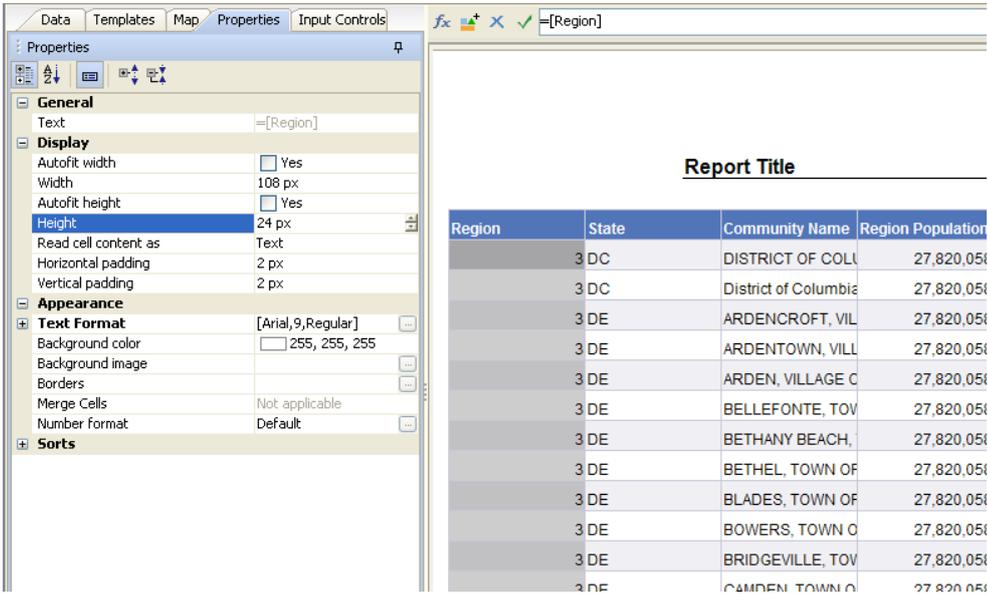

8. To filter the query, drag and drop the data element(s) to the **Query Filters** box (box below Results Objects). Then for the filters you choose, choose operation and value for the element chosen.

9. Once you have set your data elements and filters, click [Run Query] to view the report results.

10. Click on [icon] at the top right to hide the folder navigation panel to display more of the report.

11. To remove a column from the report, click the column title and drag and drop it back to the **Data** box. Or click the column title to highlight it and press Delete on your keyboard.

12. To format a column, click a row under the column title to highlight the entire column. Click the **Properties** tab for options to change the format of the column.

Properties Screen View

13. Click **Edit Query** to update the query.

14. To add additional information to this query, drag and drop additional data element(s) to the **Results Objects** box.

15. To add additional filter(s) to this query, drag and drop the data element(s) to the **Query Filter** box and set the filters.

Query Filter Screen

16. Click **Run Query**.
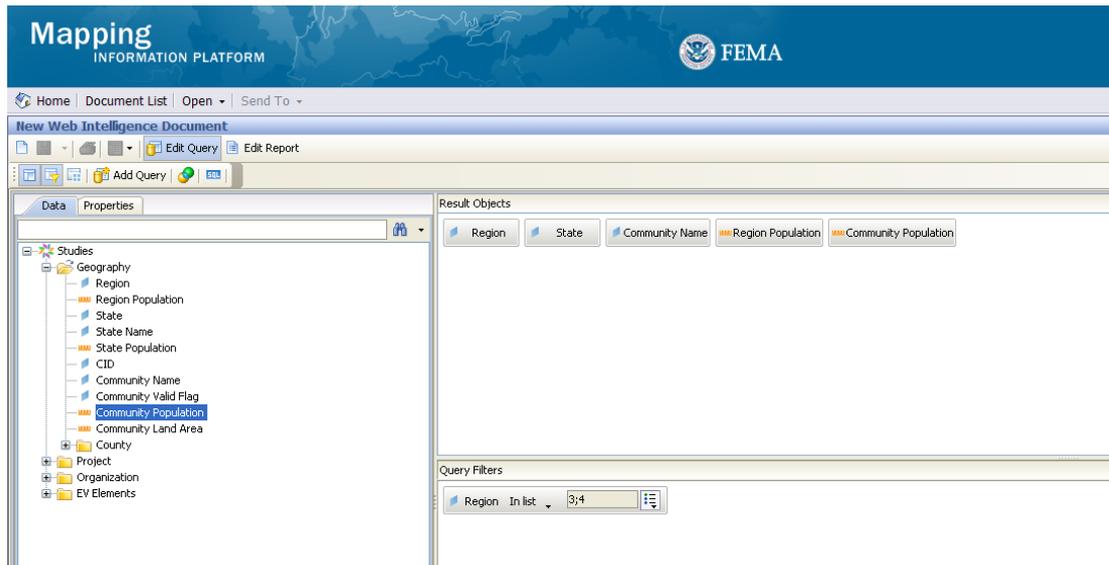
** IMPORTANT** The new data element(s) you added are not yet included in the report results. You now have to drag and drop those data element(s) into the report. Drag and drop the new data element(s) into the report between two column titles.

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

18. Right click on any column title for more format options, including: Sort, Format Number, Remove Row/Column, etc.

19. Double click on the report title to change the report name. Enter the report name and hit Enter.

20. Don't forget to save your changes! Click on the down arrow to see the following save options:

- Select **Save as...** to save the report to **My Favorites**.

- Select **Save to my computer** as to save the report in a different format to your computer.

Mapping
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21. When you select **Save as…** the Save Document screen appears when you save a document to your favorites.

Save Document Screen
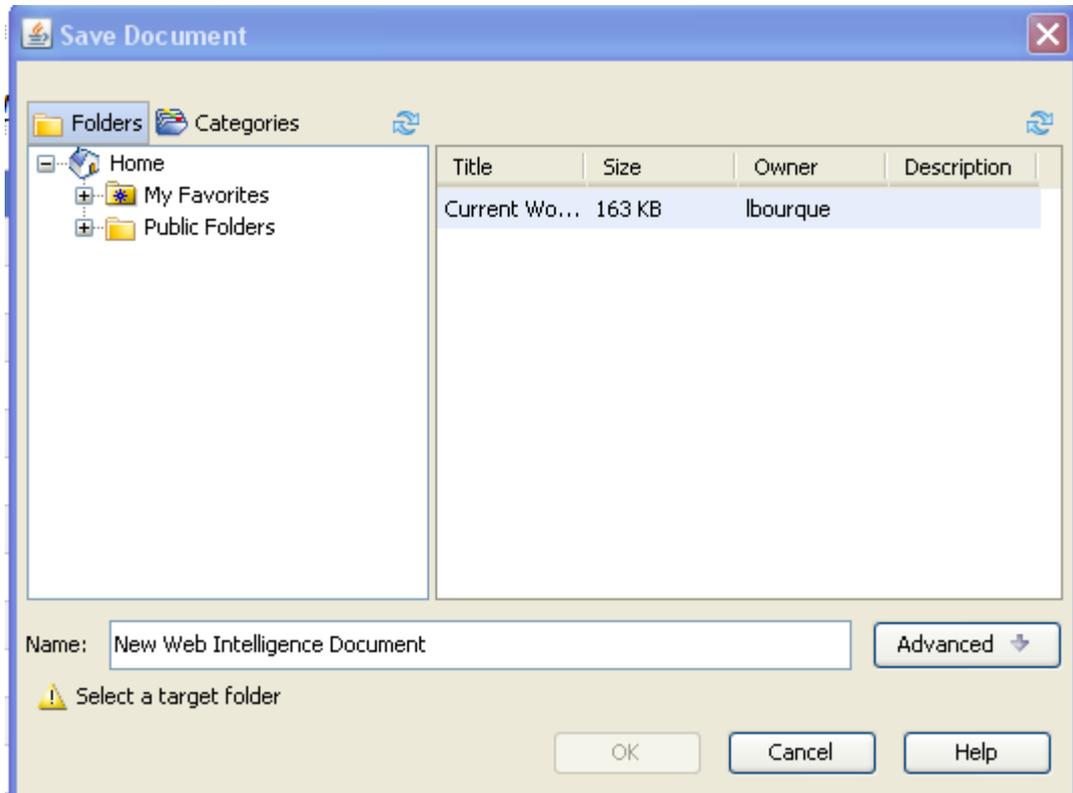
22. Enter a Title of the report. The Description and Keywords boxes are optional fields.

23. Under the **Advanced** button 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.

Permanent Regional Formatting is not an option we will use in MARS.

Schedule the Report to be Sent in an Email

24. On the MARS home screen, click on the **My Favorites** link to highlight that this is the folder where you want the report saved.

25. Click the **My Favorites** link to view all of your personal reports.

26. In the **My** Favorites screen, click on the report you want to schedule.

My Favorites Screen
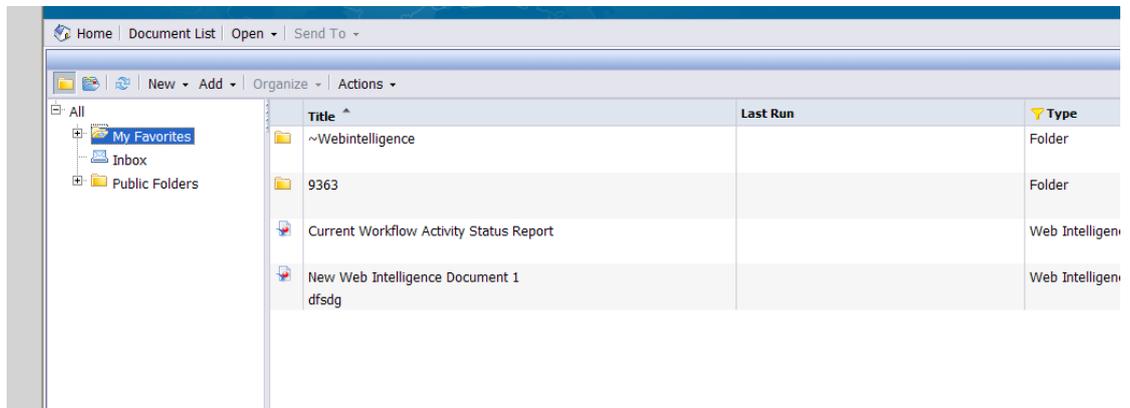
4.   Click on the **Actions** dropdown box

28.   Click the **Schedule** in the **Actions** dropdown menu and the schedule screen appears.

Schedule Screen
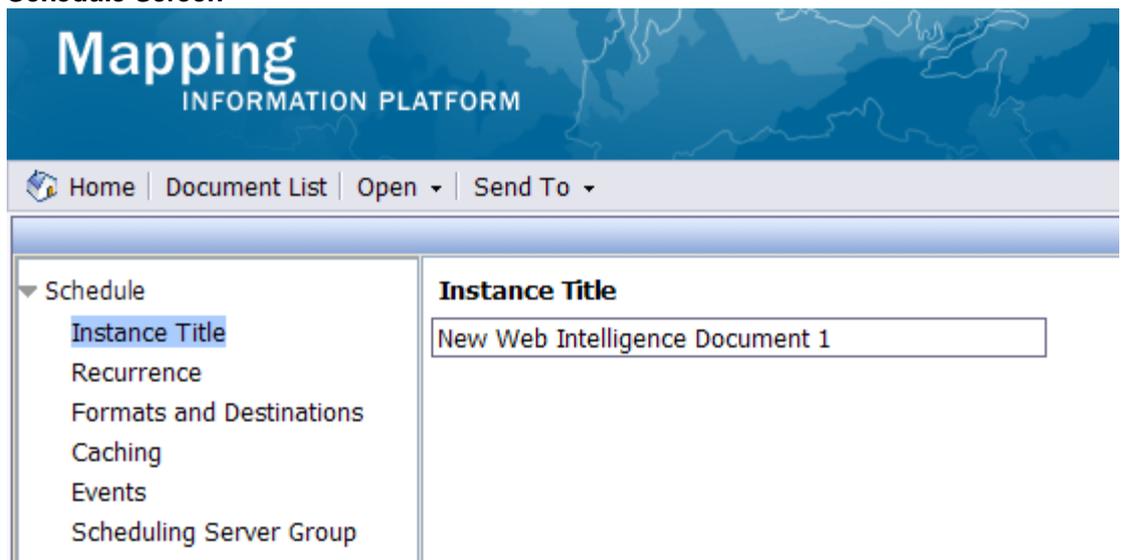
29.   To select the Date/Time to send your report click on **Recurrence** in the left hand navigation.

30.   Then in the **Run object** dropdown box select the frequency of when you would like the report to run.

Run Object Screen
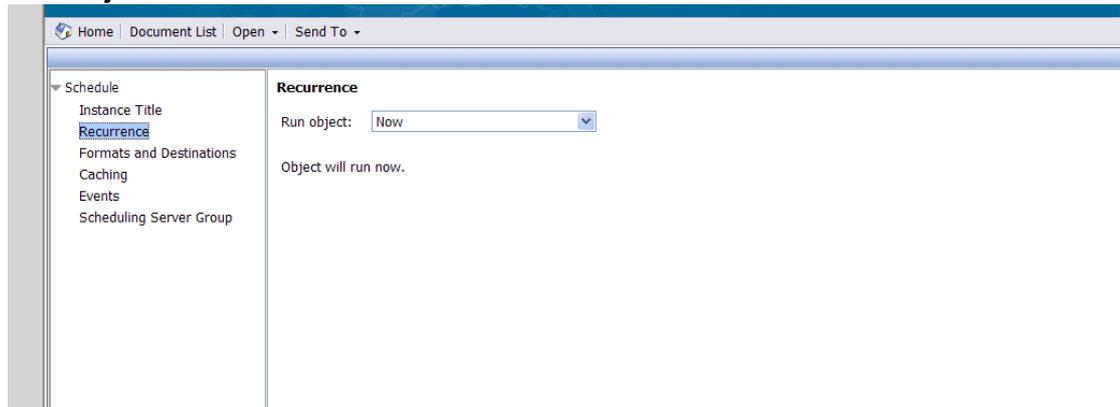
31. Click on the **Formats and Destinations** in the left hand navigation bar to choose the format and destination options.

32. 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.
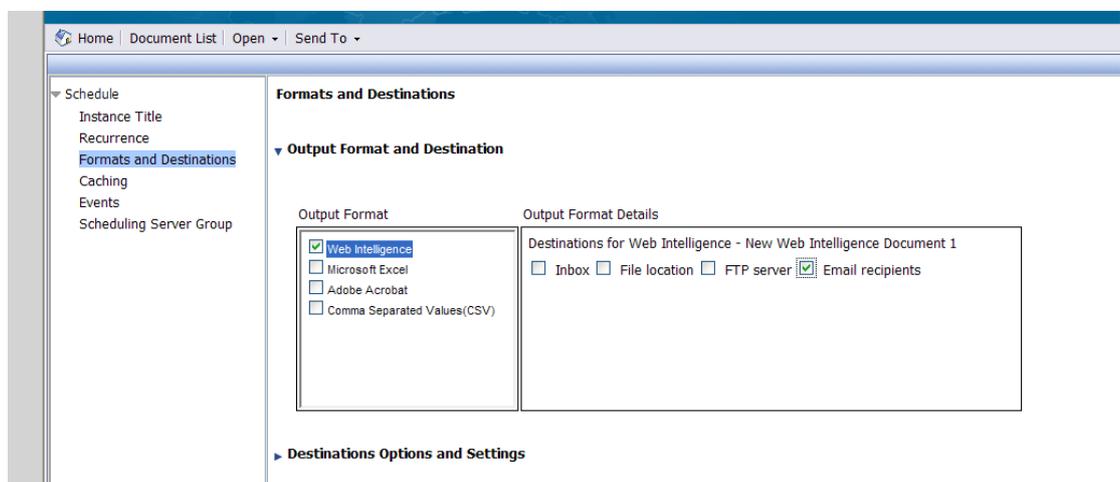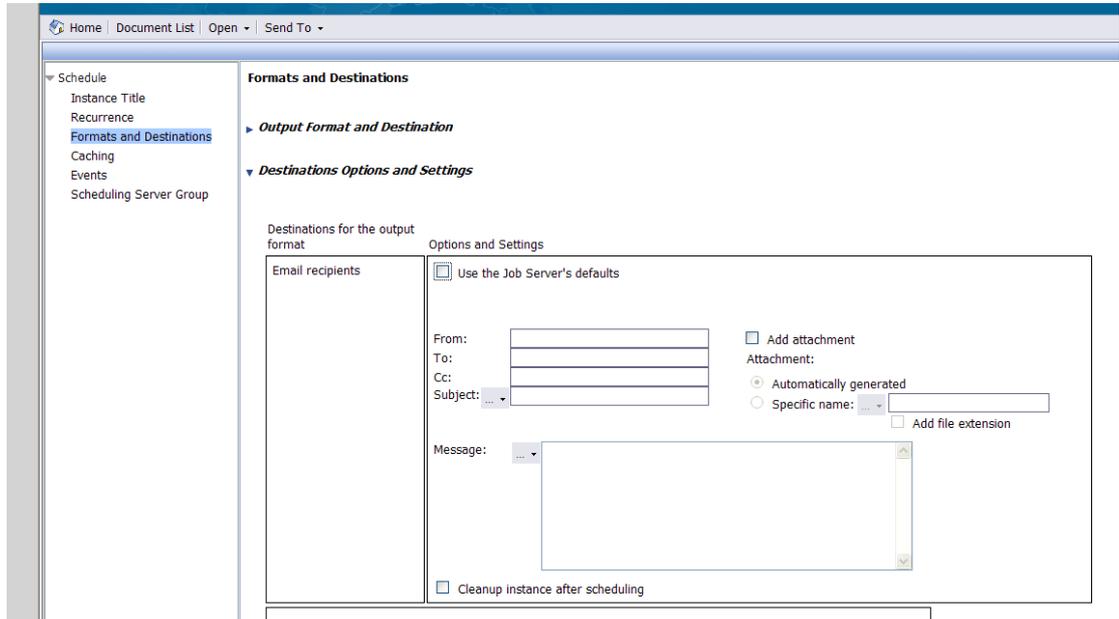

What is the difference between Inbox and Email recipients?

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.

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

34. 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.

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

36. 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.

37. 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.
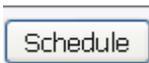
38. Click [Schedule] in the bottom right of the screen to schedule the email with the added features.

39. 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.

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Results
Congratulations! You have successfully: - Created and formatted a new report - Modified the query with new data elements - Saved the report to My Folders - Scheduled the report to be sent in an email