

MIP Ad-Hoc Reporting System – MARS

To access the MIP Ad Hoc Reporting System (MARS), a user must be a registered MIP user and logged into the MIP. Once logged in, a user will see the MARS Tab. A user can then click on the **Access MARS** button from the MARS landing page. Within the system, a user can report on plan information in real time, run pre-built reports, create custom reports, and export reports to a worksheet or PDF. When using the system always continue past security warnings and do not block any Java components from running.

MARS Reporting System Capabilities:

- View canned reports
- Create ad hoc reports
- Data is one day old

Key Terms:

- Business Objects - The MARS Reporting System software
- Web Intelligence Document - Query template
- Query - Included data elements and filters needed to create/modify a report
- Report - the result of a query
- Ad hoc Reports - These are custom reports that can create
- Canned Reports - These are pre-built reports

Key Features:

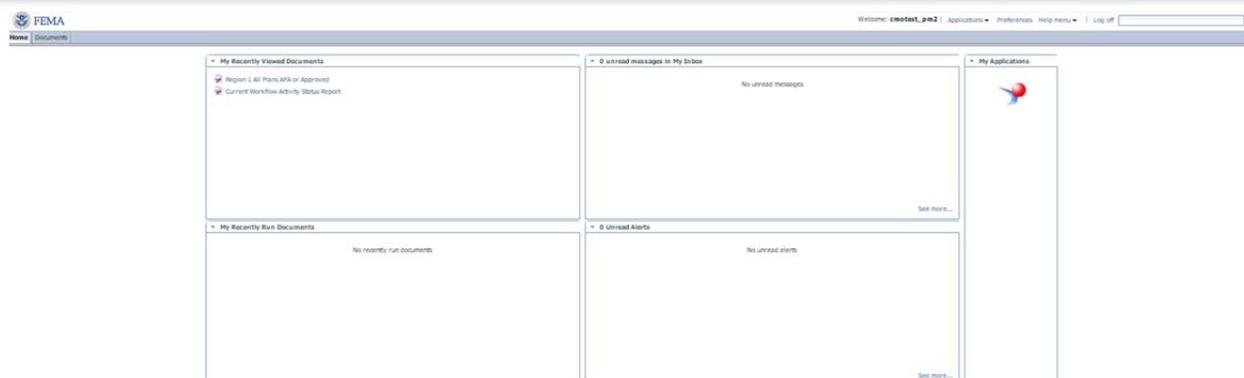
- Can have multiple reports open at the same time and toggle back and forth between them
- Expanded Actions ribbon that allows user to complete steps faster
- Advanced graph layout options

Home Page

Upon Opening the MARS Reporting System users will see the “Home” page. This page will serve as a dashboard which allows users to quickly see Recent Viewed Documents, Inbox Messages, Recently Run Documents, and any Unread Alerts.

Tip:

- A User can always toggle back to the “Home” page by selecting **Home** tab on the Tool Bar



Home Page Screen

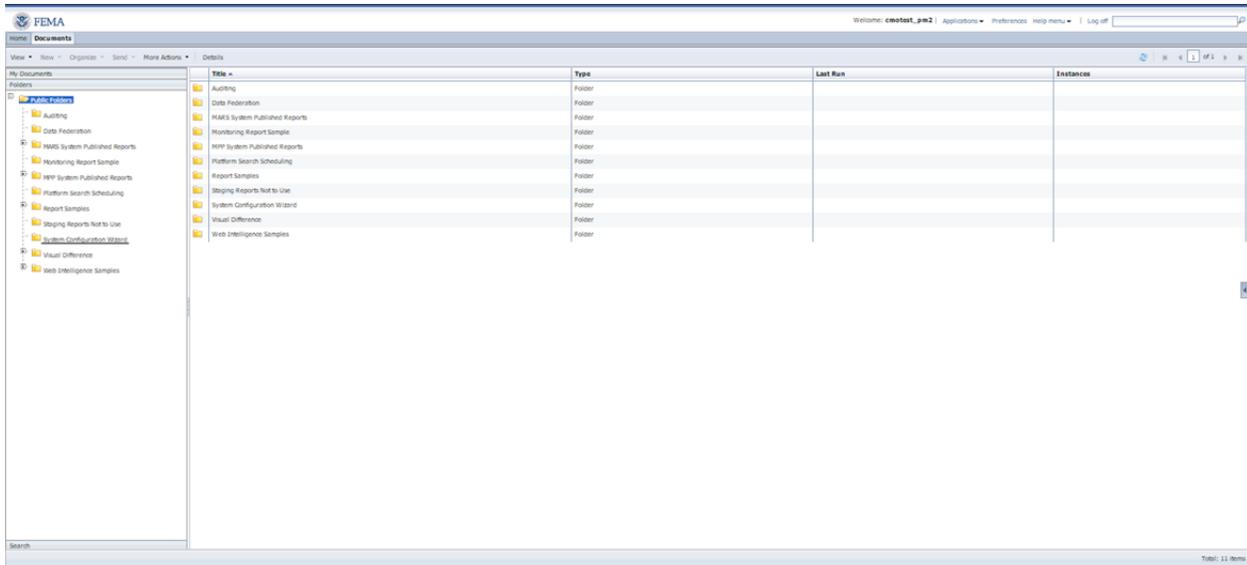
Next to the **Home** tab is the **Documents** tab.



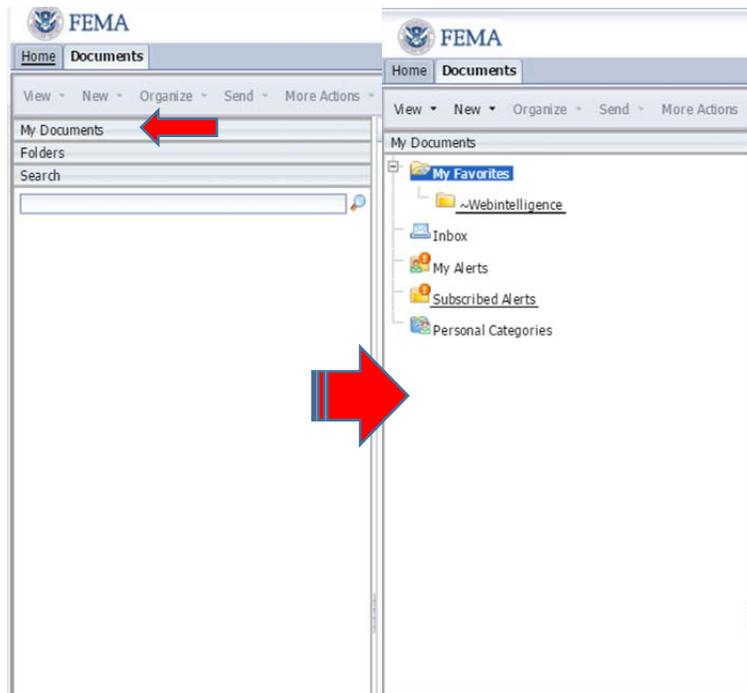
The **Document** tab takes users to the Reporting System Home Page (Shown Below). This page is where users can run and edit reports. In addition, from this page users can view the Navigation panel where they can locate *My Documents*, *Folders*, and a *Search* function.

Tips:

- Please note the page is defaulted to load with the Navigation panel opened to Folders (As Seen Below)
- To locate *My Favorites*: Click on the My Documents Tab within the Navigation panel. Doing so will display the *My Favorites* folder (Image 2)



Documents Main Page



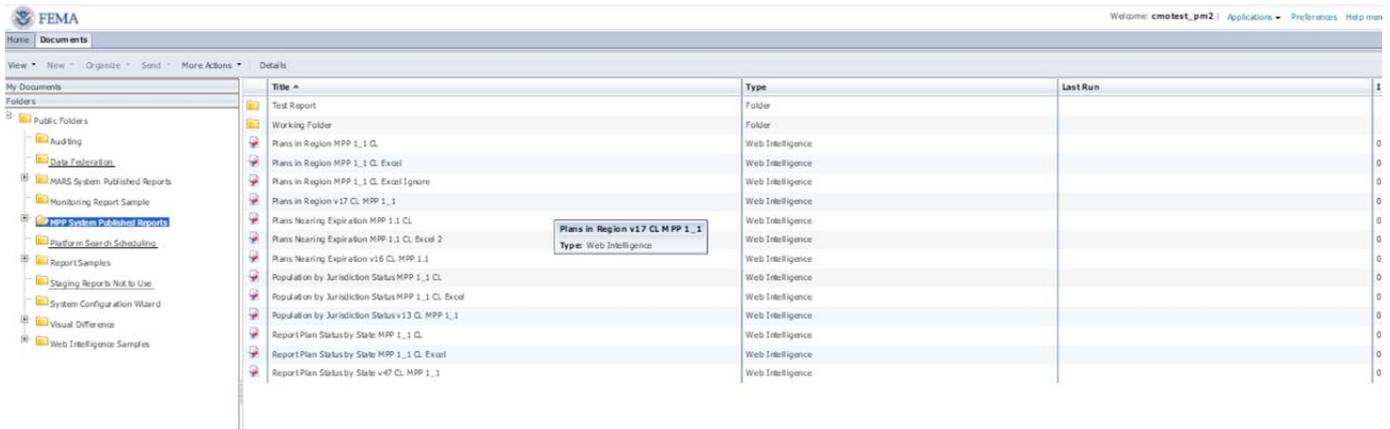
Navigation Panel to My Documents Panel

Canned Reports

Canned Reports are pre-built reports that users can run in the reporting system. Complete the following steps to run a canned report:

Steps:

1. Access the Folders List through the Navigation panel
2. On the left-hand navigation, click the plus sign (+) next to the Public Folders to expand the folder
3. Click on MARS System Published Reports
4. Open the report to run by double clicking on the canned report



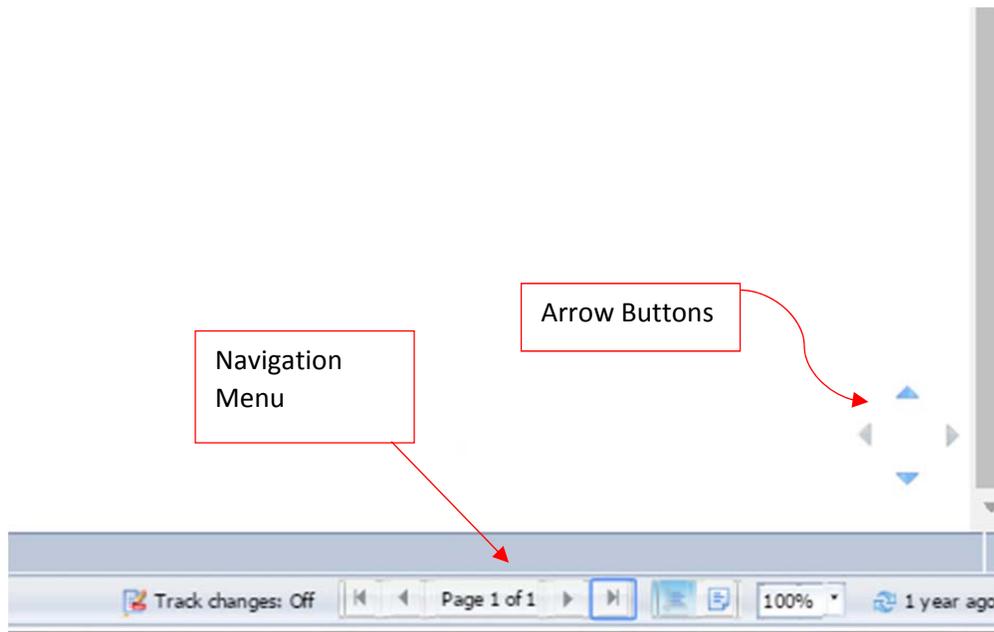
MARS Canned Report Menu

NOTE:

- Users may need to fill out a prompt that appears. For example, in the Plans in Region canned report, users will need to enter the State and Plan Type parameters to query. Select values on the Prompt screen by double clicking on the value or by clicking once on the value and pressing the “>” button in the middle of the screen. Remove selected values by clicking the “<” button. After completing the required prompts, the Run Query button on the bottom right of the Prompt screen will activate
- Press the Run Query button to run the report

Tips:

- On the bottom, right-hand corner of the screen, users can navigate the report by pressing the arrows to move forward or backwards one page at a time. Jump to pages by using the Report Navigation menu. When users run a report, only the first page will display and the Report Navigation menu will only show 1 of 1 pages even if there is more than 1 page. To view the total number of pages, click on the Jump Forward button to skip to the last page (Image 1)
- To change the original prompted values, press the Refresh Data button (Image 2)



Report Navigation Menu (Image 1)



Actions Ribbon (Image 2)

Refresh Button

Saving a Report

Users can save reports to local computers or to the **Favorites** Folder. To see the saving options, click on the Disk which is located on Actions Ribbon.



Steps to Save to a Local Computer:

1. Click on Save To My Computer As
2. Click on Excel to save the report into an Excel spreadsheet or PDF to save the report into a PDF document or on your computer

NOTE:

- Depending on local computer security settings, a pop up blocker may appear when trying to download a file. To avoid a pop up blocker appearing on the screen, hold down the Ctrl key when clicking on the drop-down menu. Continue to hold down the Ctrl key until the Save As screen
- When exporting a report to Excel, by default the upper left of the table will not be located at cell A1. To ensure the table is at the top left corner take the following steps:
 1. Right-click on the four small arrows on the top left corner of the table in the report
 2. On the menu select Align and then Relative Position
 3. On the menu that pops-up, go to the Layout tab, set the left and top positions of the table to 0 inches, and click Apply and then OK
- In the saved Excel, before doing any action on the cell, change the Format Cells of the cell from "General" to "Text."

Steps to Save to My Favorites:

1. Users must save canned reports to My Favorites before being able to edit them. When saving, confirm the file names and titles of the copied canned reports have been changed to distinguish them from the original reports. Reports under My Favorites can be scheduled to run automatically which can then be emailed. To save a canned report to My Favorites while a report is open, click on the Document drop down arrow and click on Save As
2. Save created ad hoc reports to My Favorites as well. The workflow for saving ad hoc reports is identical to saving copies of canned reports

Steps to Save to Working Folder:

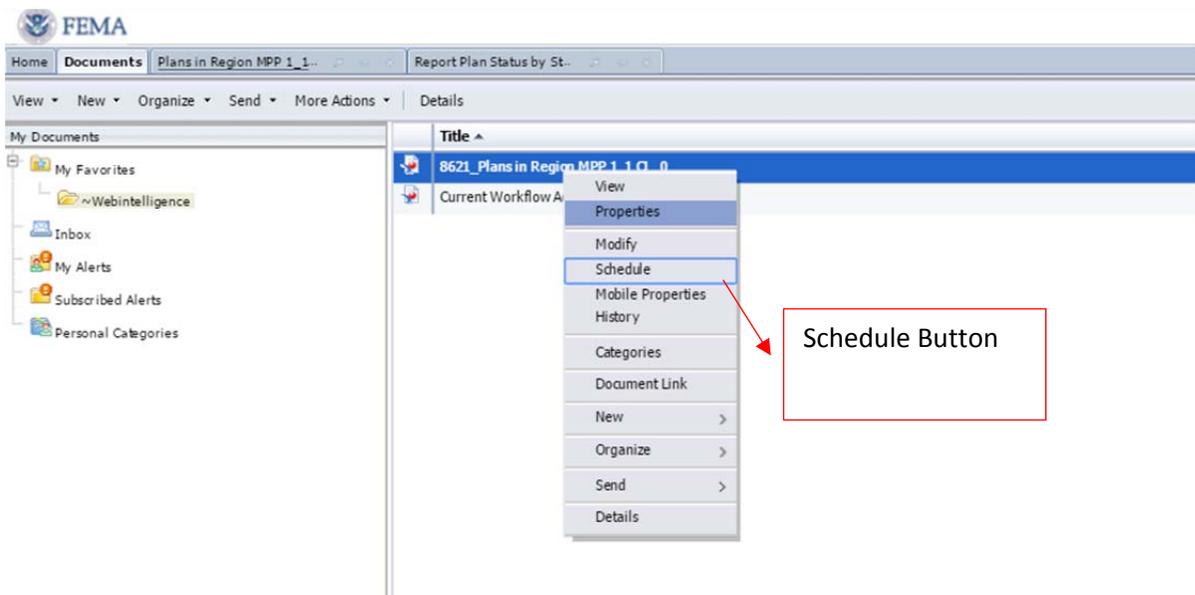
1. A group folder has been set up for anyone to save and/or edit ad hoc reports. The Working Folder can be accessed by clicking on the Public Folders and then MARS System Published Reports
2. This is a more efficient way of sharing reports with multiple people
3. When saving a new report to the folder, make sure to give it a clear title
4. When saving in the Working Folder, do not override someone else's report

Scheduling a Report

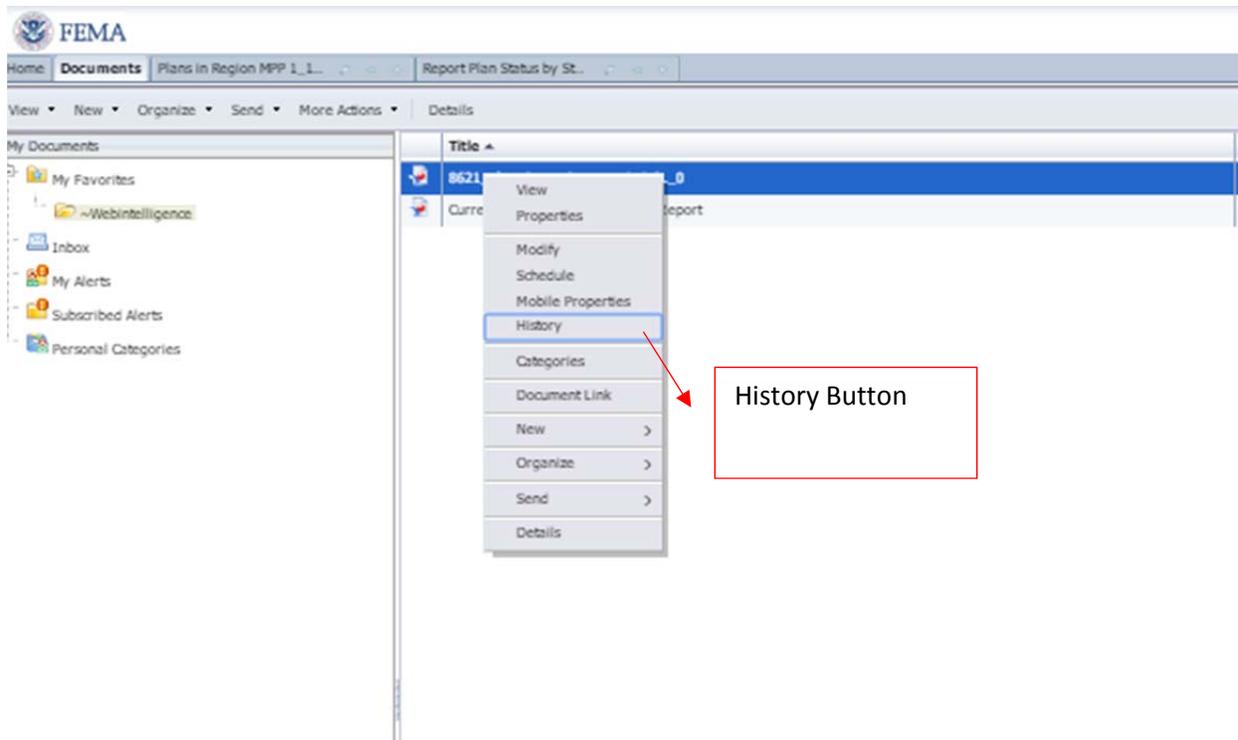
Configure the MARS Reporting System to schedule recurring reports:

Steps:

1. Select the report to schedule by right clicking on it
2. Right-click on report to bring up menu and select Schedule (Image 1 below)
3. Click the Schedule button, once the other options have been completed on the bottom right corner to schedule to the report (Others options steps outlined below)
4. To view the status of a scheduled report, find the report in Document List, right-click on the report, and select History. Users can also delete, pause, and edit scheduled instances from the History menu (Image 2 below)



Schedule Menu (Image 1)

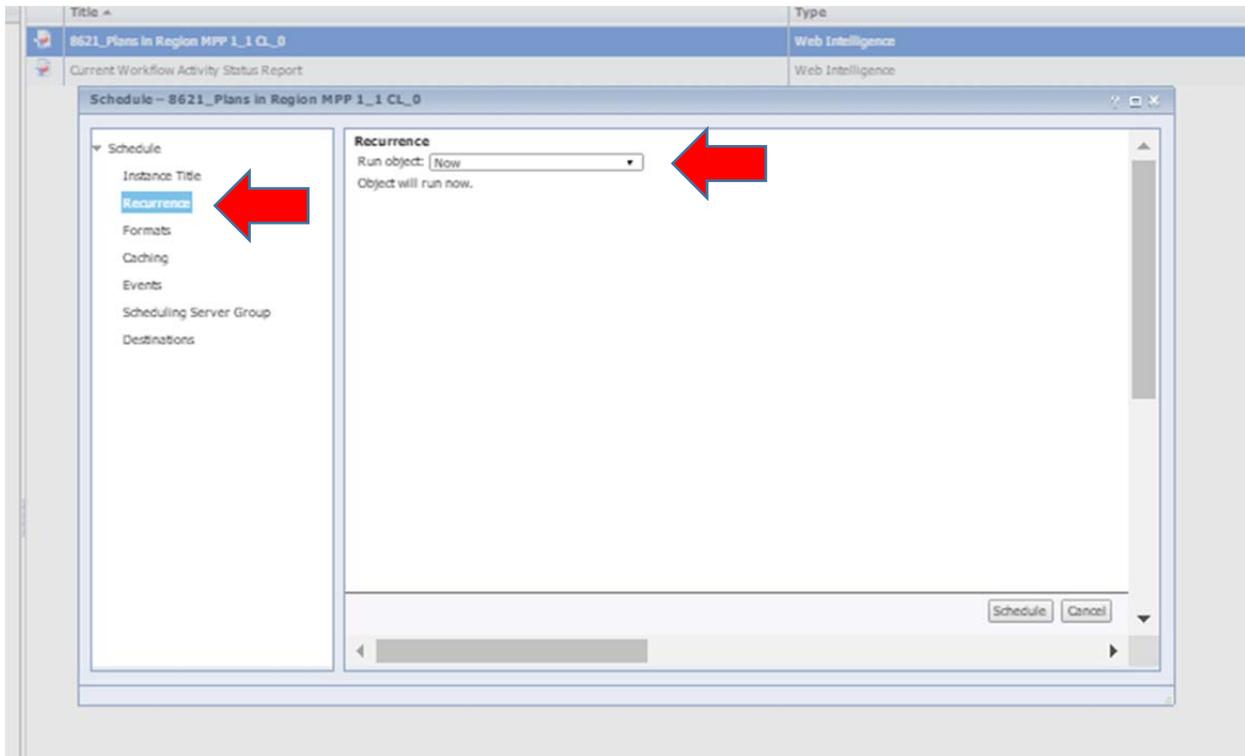


History Menu (Image 2)

Other Options within the Schedule Menu

Recurrence Schedule:

1. Click on Recurrence in the left-hand navigation panel. Select the Run object drop down box, choose the report run frequency and enter associated details to schedule when the report will run (which day of the week and which time). The start and end dates/times only specify during which time periods the reports can run



Recurrence Menu

Selecting Formats and Destinations:

1. Click on the Formats or the Destinations in the left-hand navigation bar within the Schedule window to choose the format options
2. Under Output Format table, check the box next to the format and destination for the report

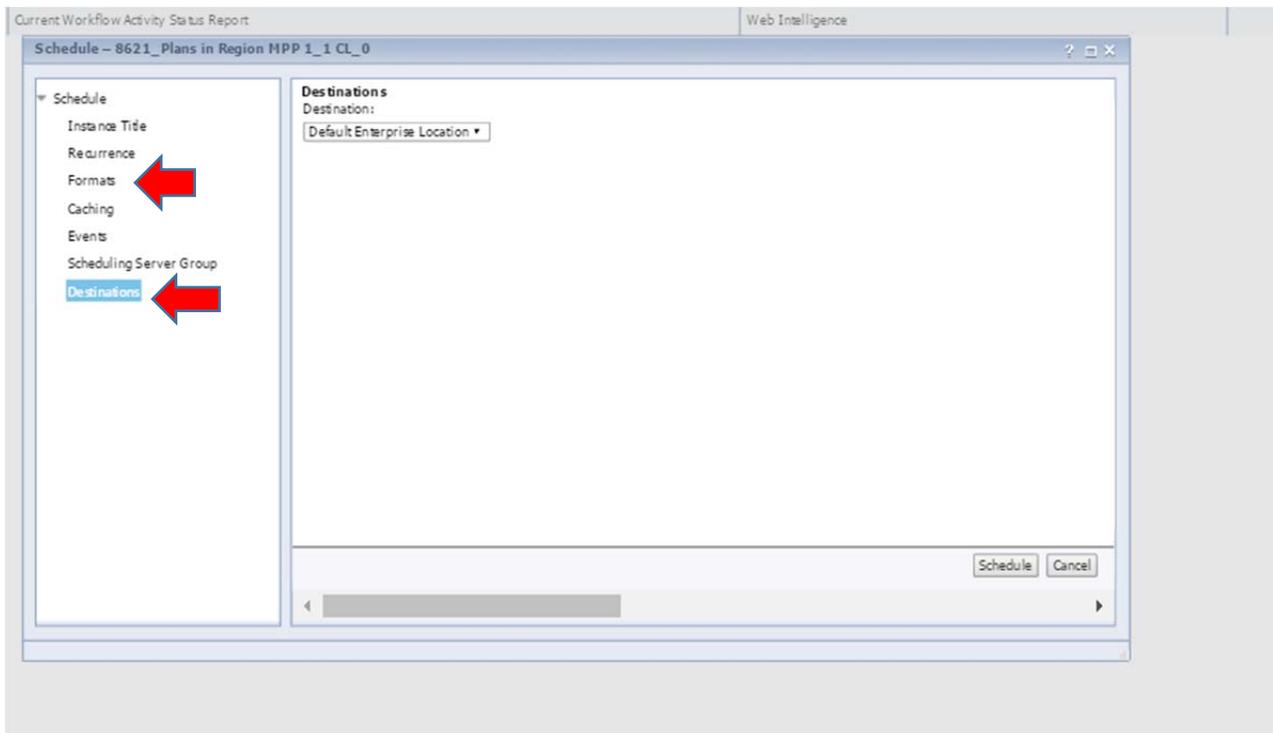
Note:

- Do not select Web Intelligence if emailing the recipient. The recipient will receive the link in his or her email, but the tool is not set up to work off email. Only select Web Intelligence if selecting Inbox in the Destination drop down box
- Always choose Inbox or Email recipients. When emailing a recipient, choose either Microsoft Excel or Adobe Acrobat. Be advised there is a difference between Inbox and Email recipients
 - Inbox - This is not the user's email inbox, but the user's Reporting System inbox. Use this option to send reports to other users. Sending to the 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 email account of their choice
 - Complete the email fields to send the report to a user. Any standard email address will work

- Check the Specific name radio button to add a name of the report to display in the email attachment. If Automatically Generated is selected, then the report name will be a random set of numbers and letters that appears in the user's attachment 10. Keep the Add file extension box checked. This will automatically add the correct extension

Tip:

- If the report requires a user to enter values in a Prompt screen, click on Prompts in the left-hand navigation bar. Then click the Modify button to pop up the Prompt screen, where the user can enter the prompt information



Formats and Destinations

Creating a New/Ad Hoc Report

What is an ad hoc report? By creating an ad hoc report, users can generate data on the fly for any plan in the MARS system and manipulate the data to create a custom report.

Things to think about prior to creating an Ad Hoc Report:

1. First pick what plan information will be displayed in the report
2. Decide how the report will query plan information by creating a filter
3. Run the query, which pulls the plans that meet the criteria set in the filter and displays the information specified
4. Edit the resulting report to meet further needs
5. Save the report, so it can be run on demand

Note:

- Ad hoc reports and Java: Users may run into issues with Java compatibility when creating ad hoc reports. Please ensure that the 32-bit version of Java installed on the computer.

Performance Considerations:

When running ad hoc reports, querying too much data at once may cause performance issues. Always try to apply filters to only query the plans desired. Adding too many objects to the Results Objects pane may also have a performance impact. If an ad hoc report takes more than 15 seconds to run, take the following steps:

- Add more restrictive filters
- Remove objects from the Results Objects pane
- Confirming that the Retrieve Duplicate Rows property is unchecked

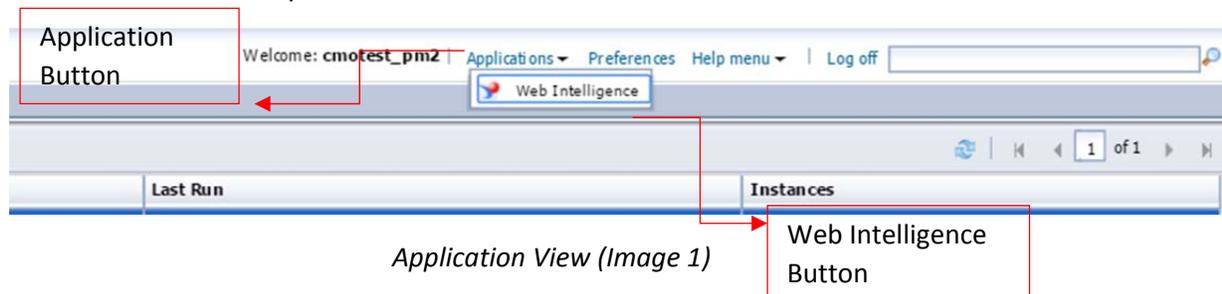
Create ad hoc Repots

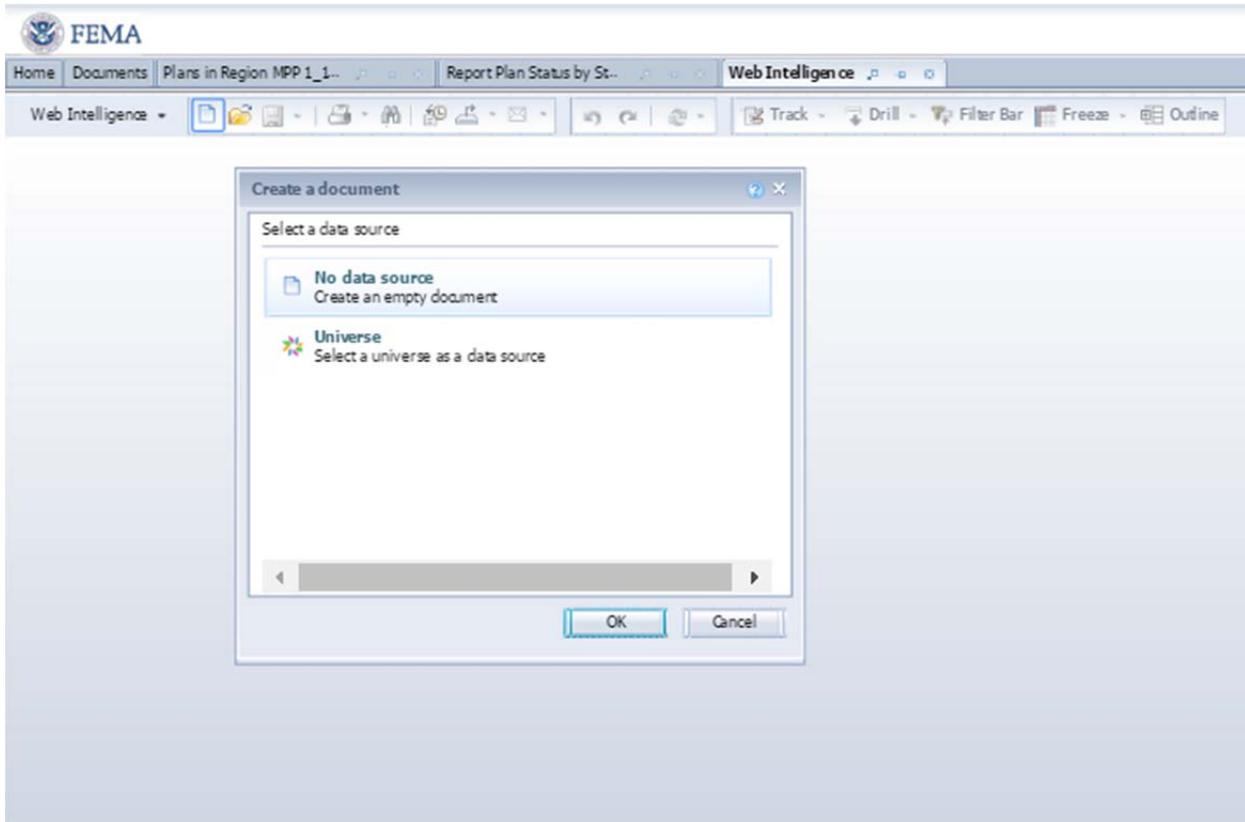
Steps:

1. To create a new report, click on the Applications Tab located in the top right hand corner (Image 1)
2. Click on the Web Intelligence Document button (Image 1)
3. Then click on the New Icon located in the Actions ribbon (Image 2)
 - a. This will display a new window that will prompt a user to select the Studies, Revisions, or Amendments Universe (Image 3 below)

Note:

- A user can only select one universe at a time. Once you select a universe you will only see data elements related dot that universe.





Create a new universe window (Image 3)

Tip

- If saving a report to My Favorites make sure to check the Refresh on open box under Advanced when saving the report
- Users can also schedule ad hoc reports to be emailed the same way as saved canned reports in the My Favorites folder
- When creating ad hoc reports, start by creating a simple query. Modify your filters till you are pulling only the plan records you desire. Once you have finished configuring the filters, make sure you include all the data elements that you would like to report on in the Result Objects pane
- Finally, format your report to your liking, and share it with your colleagues by saving it to your computer and emailing it

Edit/Modify ad hoc Reports

Steps:

1. Find the existing ad hoc report, right click on it and press the Modify Menu Option
2. Click on either the Studies, Revisions, or Amendments Universe
3. Pass through any warnings or pop-ups that appear. Don't block or restrict anything
4. Once on the page showing the available data, navigate through the data elements on the left-hand side under the Universe Objects pane. Click on the + to open folders containing data elements
5. Move the desired data elements into the Result Objects pane to be included in the report. They will automatically populate a table of the report, after running the query. Users can select and drag elements or double-click on them to move them to the Results Objects pane
6. To filter the query, drag and drop the data element(s) to the Query Filters pane below the Results Objects pane. The data elements that are placed in the Query Filters pane are used to define which plans will be reported on once the query is run. For each data element added to the Query Filters pane, users must specify the conditions that must be met for plans to be included in the report
7. Once a data element is added to a Query Filter, users should configure the filter settings for the element
 - a) Condition – The system compares the records to the Value using the Condition. The available conditions include Equal To, Not Equal To, Greater Than, Greater Than Or Equal To, Less Than, Less Than Or Equal To, Between, Not Between, In List, Not In List, Is Null, Is Not Null, Matches Pattern, Different From Pattern, Both, and Except
 - b) Value- Users can enter free text in the Value field when the Value Options menu is set to Constant
 - c) Value Options- The options in this menu define how the input parameters are selected for the report
 - d) Value for the Query:
 - a. Constant – Free text entry of the Value
 - b. Value(s) from List – Pull Values from a list of available Constant
 - c. Prompt – Have a Prompt window pop-up whenever the report requires a value input
 - d. Result from Another Query – No used
8. Once the data elements and filters are set, click the Run Query button to view the report results
9. After querying the data, the resulting report will be displayed. The data elements chosen will be structured in the same order that was placed in the Results Objects pane. Users can edit the report's formatting and structure
10. To refresh the data, press the Refresh Data button
11. To make changes to the query or add new data elements to display, click on the Edit Query button

12. Save the new report by clicking arrow next to the Save button on top left corner of the screen

Tip

- Notice that when dropping data element marked with a green pyramid, it will always bring over the parent data element. The following Object Types are available:
 - Dimension Object (blue box) – base elements for creating a query
 - Detail Object (green pyramid) – provides additional information for a dimension object, but does not form the basis of a query