Mapping
INFORMATION PLATFORM

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

Navigation

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

Work Steps

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.

3. From the MARS home page, click on the New dropdown box to create a new report.

Mapping
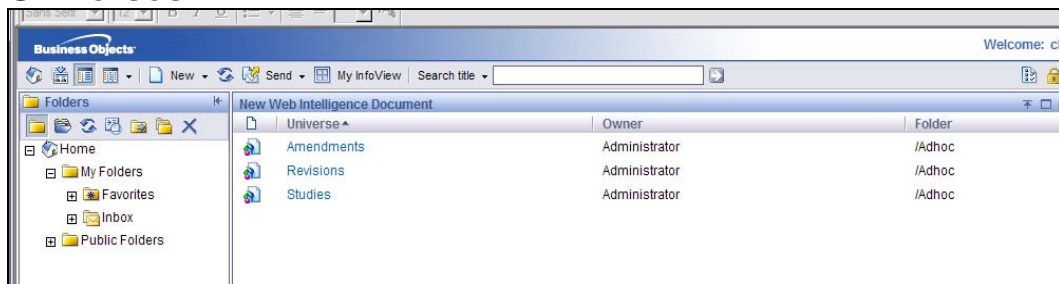### INFORMATION PLATFORM

Create New Report
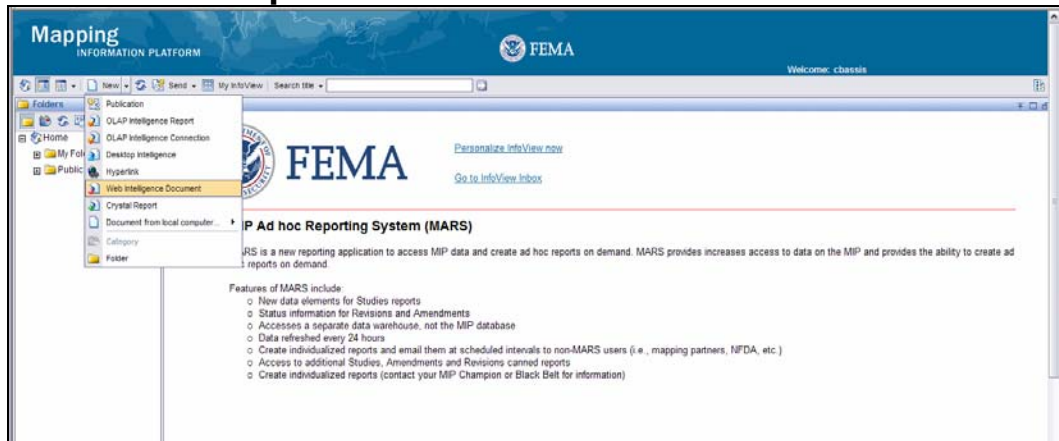
4.   Select **Web Intelligence Document**. Web Intelligence Document is the only document type we will choose from this dropdown list.

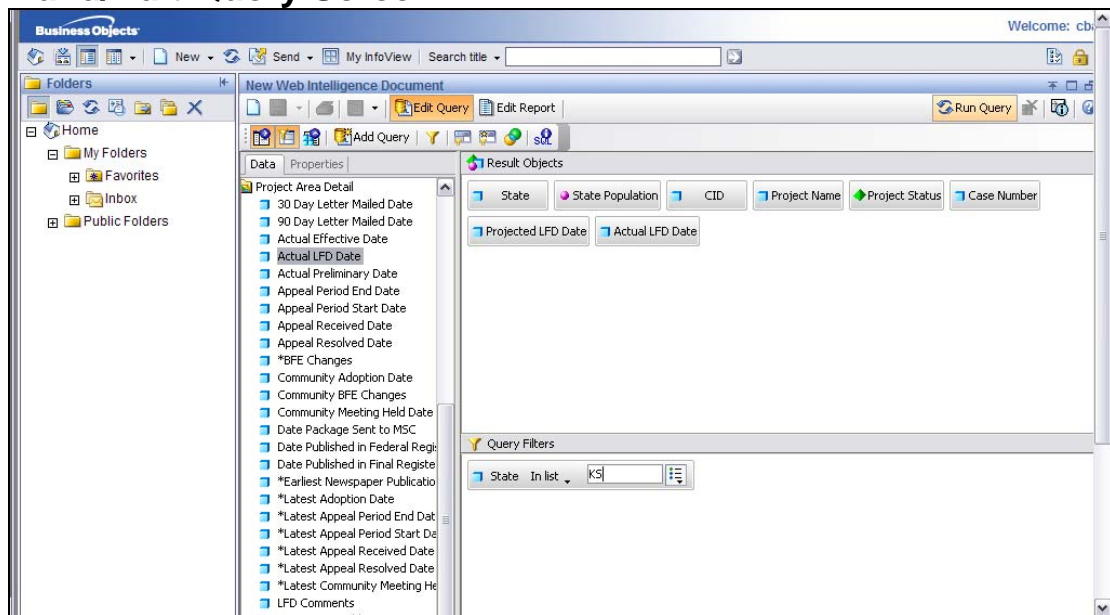You can also create a new folder in My Folders by selecting Folder.

Universes

5.   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.

Build/Edit Query Screen

6. Navigate through the data elements list 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).

7. To filter the query, drag and drop the data element(s) to the **Query Filters** box.

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

9. Click on the [←] arrow to hide the folder navigation panel to display more of the report.

10. 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.

11. 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.

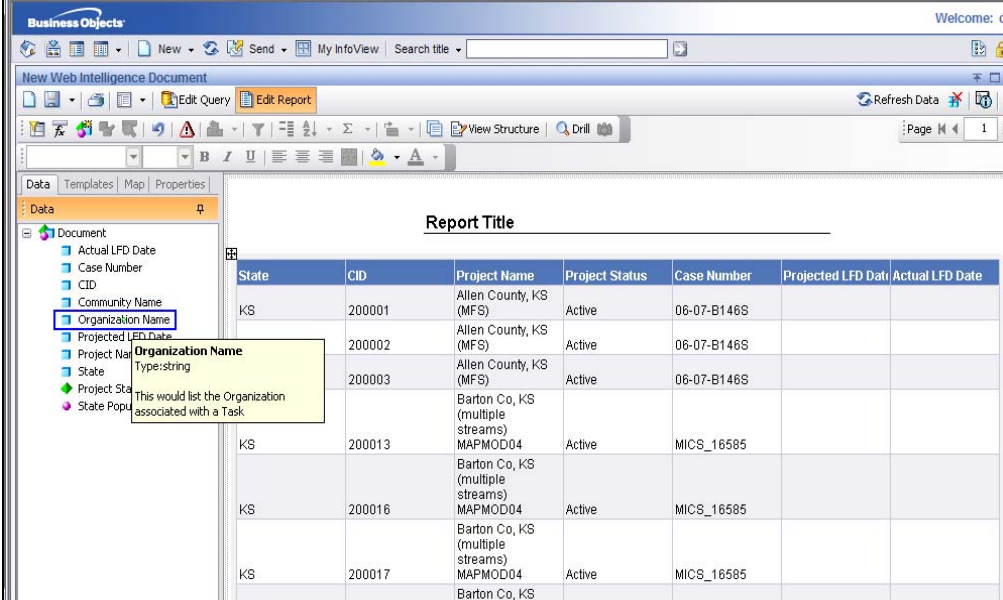**12.** Click [Edit Query] to update the query.

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

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

15. 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.

## New Edit Query Results

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

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

18. Double click on the report title to change the report name. Enter the report name and click to save the entry.

19. Don't forget to save your changes! Click the dropdown box.

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

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

20. When you select **Save as…** the Save Document screen appears when you save a document to your personal folders.

Mapping INFORMATION PLATFORM

Save Document Screen

21. Enter a Title of the report. The Description and Keywords boxes are optional fields.

22. 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.

23. Click on the **Favorites** link to highlight that this is the folder where you want the report saved.

24. Click [OK] to save the report to the **Favorites** folder.

25. Click [icon], the toggle navigation button, to unhide the folder navigation panel.

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

Favorites List

Mapping
INFORMATION PLATFORM

27. Click the **Schedule** link to set parameters for sending the report to another user. The schedule screen appears.

Schedule Screen (1 of 2)

28. Click on the + to open the **When** options. Select the option from the **Run object** dropdown box to set when the report will run.

Run object options

29. Click the + next to Destination to see the destination options.

30. Click the **Destination** dropdown box to select a destination. 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. 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.

31. Uncheck ☑ , **Use the Job Server's defaults**.

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

** IMPORTANT** The From: field must always be from a mapmodteam account. We recommend user use mip@mapmodteam.com in the From: field. The To: field must always include at least one mapmodteam.com, dhs.gov or fema.gov email address. You cannot email non-mapmodteam account users without also having a one of those domains 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.

33. **Add placeholder** provides options for adding additional information into the email message.

Schedule Screen (2 of 2)

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

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

36. 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.

37. Click the **Add Attachment** check box.

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

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.

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

Mapping INFORMATION PLATFORM

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

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

41. 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.

History Screen

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