MARS Reporting & Querying "Business User" Guide

For the Business and Power User

Navigation / Working with Corporate Documents

https://mars.rdc.noaa.gov

SAP BusinessObjects™

Table of Contents

Terminology

- **BusinessObjects 4.2™** – This is the release of BusinessObjects being used by NOAA for MARS Reporting & Querying Module as of May 2017.

- **Launch Pad**– This is the web component of BusinessObjects that provides access to Web Intelligence documents. It also allows access to other documents such as MS Excel, MS PowerPoint and PDF. Launch Pad also allows the creation of HTML links for easy navigation to other web applications. Launch Pad allows you to organize these documents to suit your personal preferences.

- **Web Intelligence (WebI)** – This is the BusinessObjects web application for building both corporate and personal documents.

- **Data Warehouse –** A data warehouse is a central database for consolidating data from different systems throughout the organization. The data warehouse is specifically architected for easy querying and reporting. The MARS Data Warehouse (MARS DW) resides on an Oracle platform at the NOAA ITC in Largo, MD.

- **Document** – A document contains one or more reports & queries. If there is more than one query, the queries must be related and linked together by common elements. The results of the query or queries is then presented in one or more report tabs. A document that is published by the MARS team for public use is called a Corporate or Public document. Documents that are created by an Adhoc user are called Personal Documents.

- **Object –** In BusinessObjects, the objects are the building blocks for the report. Objects are organized in folders within a Universe (see below). An object can be a data column such as 'Project Code', or it can be a query filter such as 'Include Labor Only".

- **Report Tab** – A document can have more than one report tabs. Report Tabs are used to show the results of the query in different ways, such as a summary and detail tab.

- **Report Section** – Within a report tab, the report can be set up to navigate by section. For example, sections can be generated by FMC and program.

- **Refresh** – Refresh refers to the action of running the query or queries for the document in order to get the latest data from the database to be presented in the report tabs.

- **Drill** – If drilling is enabled in a document, the user has the ability to click on the higher levels to drill down to lower levels within a hierarchy, such as the Fund, Program and Project hierarchy.

- **Toggle** – Toggle refers to the action of turning on and off panels within Launch Pad. Actively toggling unnecessary panels off will give the user the maximum workspace for view documents.

- **Universe** – The universe is a collection of objects relating to a particular table or set of tables in the data warehouse.

Logging In

Logging In – MARS Home Page

- Go to this web address for the MARS Home Page:

  https://mars.rdc.noaa.gov

- This page features:
  - Log In to **MARS Portal** which gives access to:
    - *MARS Data Entry Module*
    - *MARS Reporting & Querying*
  - Data Status
  - Support Information
  - Announcements
  - System Status
  - Forms
  - Reference Materials
  - Key Links
  - Downloads
  - New in MARS

- The *Data Entry* and *Reporting & Querying* modules now have a unified authentication system.

- To log in to MARS, click the *MARS Portal* button.

5

Logging In – Log In Screen

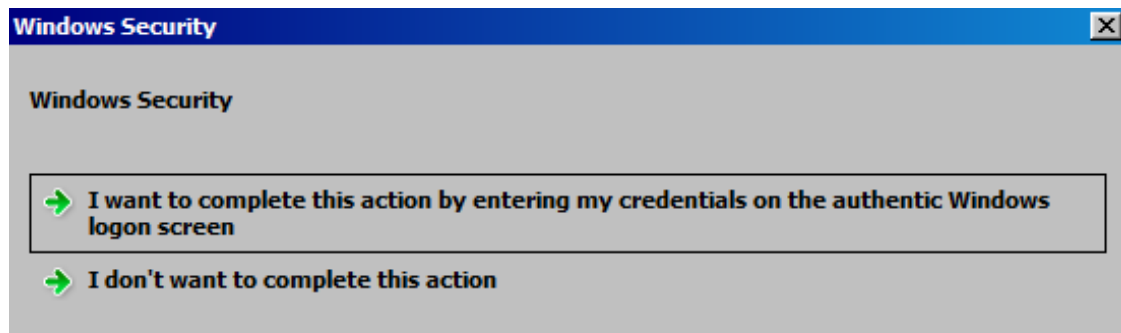Click on the button *Login with PIV/CAC* to log on with your CAC Card.

Attention: The "CAC log in" option currently works only with Internet Explorer.

It is recommended to log in to MARS with the "CAC log in" option. However, if you encounter any issue with that option, the alternative is to use your *Email ID* and *Email Password* by clicking on the button *Login With Email ID*.
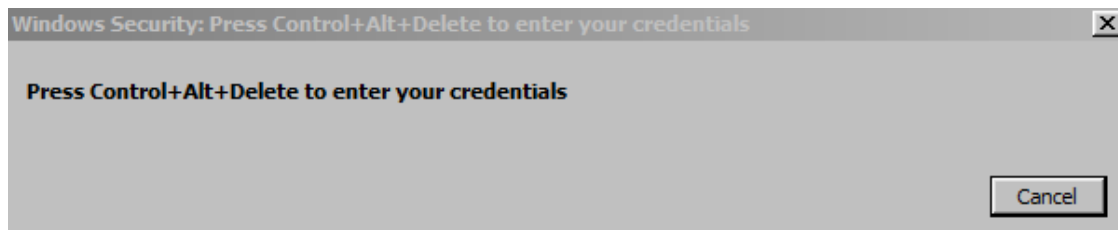
This guide will only present the steps to log in to MARS with the "CAC log in" option.

The process to log in to MARS with the Email ID and Password is self-explanatory.

Logging In – User Credentials (Certificate)

Windows Security

Windows Security

→ I want to complete this action by entering my credentials on the authentic Windows logon screen

→ I don't want to complete this action

- After clicking on the button *Login with PIV/CAC,* a Windows Security popup appears, prompting to confirm that you want to authenticate.
- Select the option: "*I want to complete this action by entering my credentials on the authentic Windows logon screen*".

Windows Security: Press Control+Alt+Delete to enter your credentials

Press Control+Alt+Delete to enter your credentials
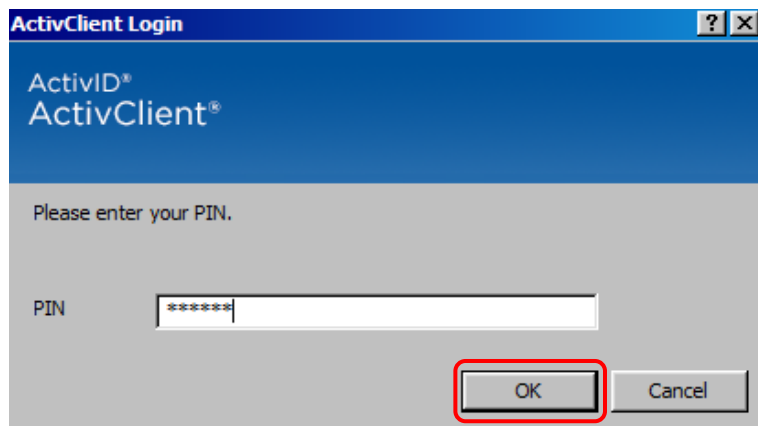
Cancel

- Then press *Control+Alt+Delete* at the same time on your keyboard, to enter your credentials.

Logging In – User Credentials (Certificate)
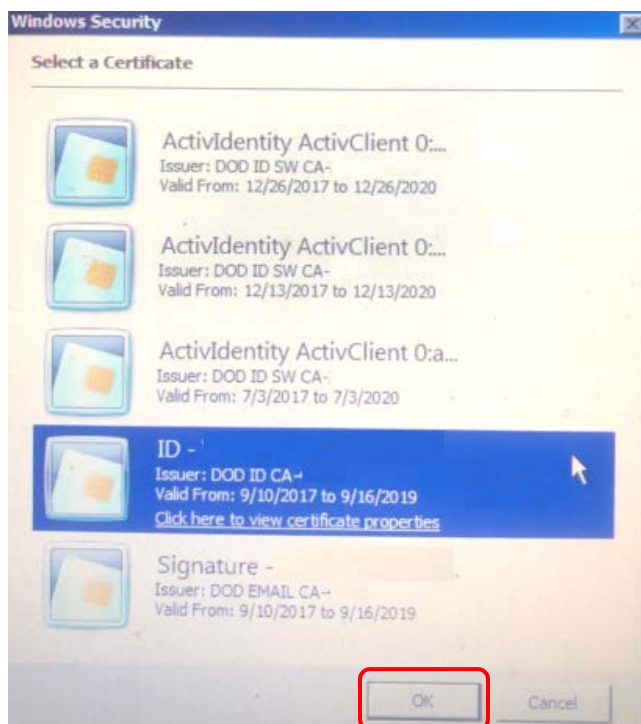
- Select the Certificate *DOD ID CA-##* or *DOD EMAIL CA-##* associated with your name, then press OK.

- Enter your *CAC Pin number* and hit OK.

Logging In – User Credentials (Certificate)

- On the "Warning Banner" page, click *Accept.*

Logging In – MARS Portal: module selection

- After you have been authenticated, the "*MARS Portal*" page is displayed and you can navigate to the *Data Entry* module or the *Reporting & Querying* module without entering a userid and a password.

- Click on the *Reporting and Querying* button and you will be automatically redirected to the Reporting and Querying's "Documents" page as shown on the below screenshot.

Going back to the MARS Portal page / Logging Out
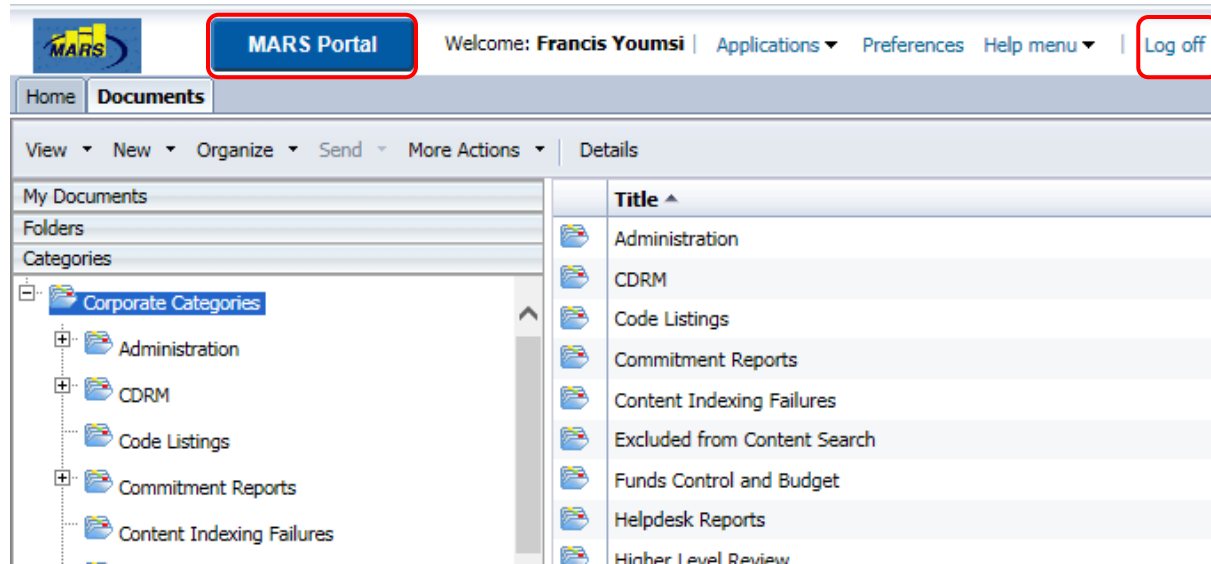
- If you want to use the Data Entry module, you can click on the button *MARS Portal* to go back to the MARS Portal page and select the Data Entry module within the same user session.

- When you are finished using the *Reporting & Querying* and the *Data Entry* modules, always log out by selecting the *Log Off* option from the menu bar.

- You will be brought back to the MARS Home page.

Home
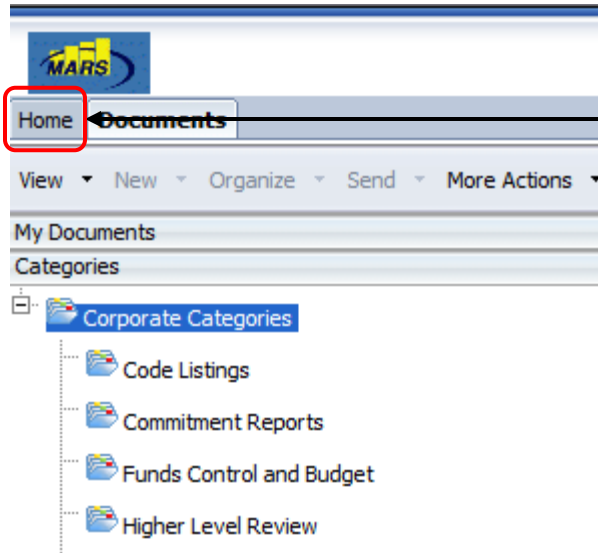
- To view *Recently Viewed Documents* , click on *Home* tab.

Home

From the *Home* tab, you can also view any unread messages in your BusinessObjects *Inbox.*

Click on the *Documents* tab to go back to *Corporate Category* view

Setting Preferences

Setting Preferences
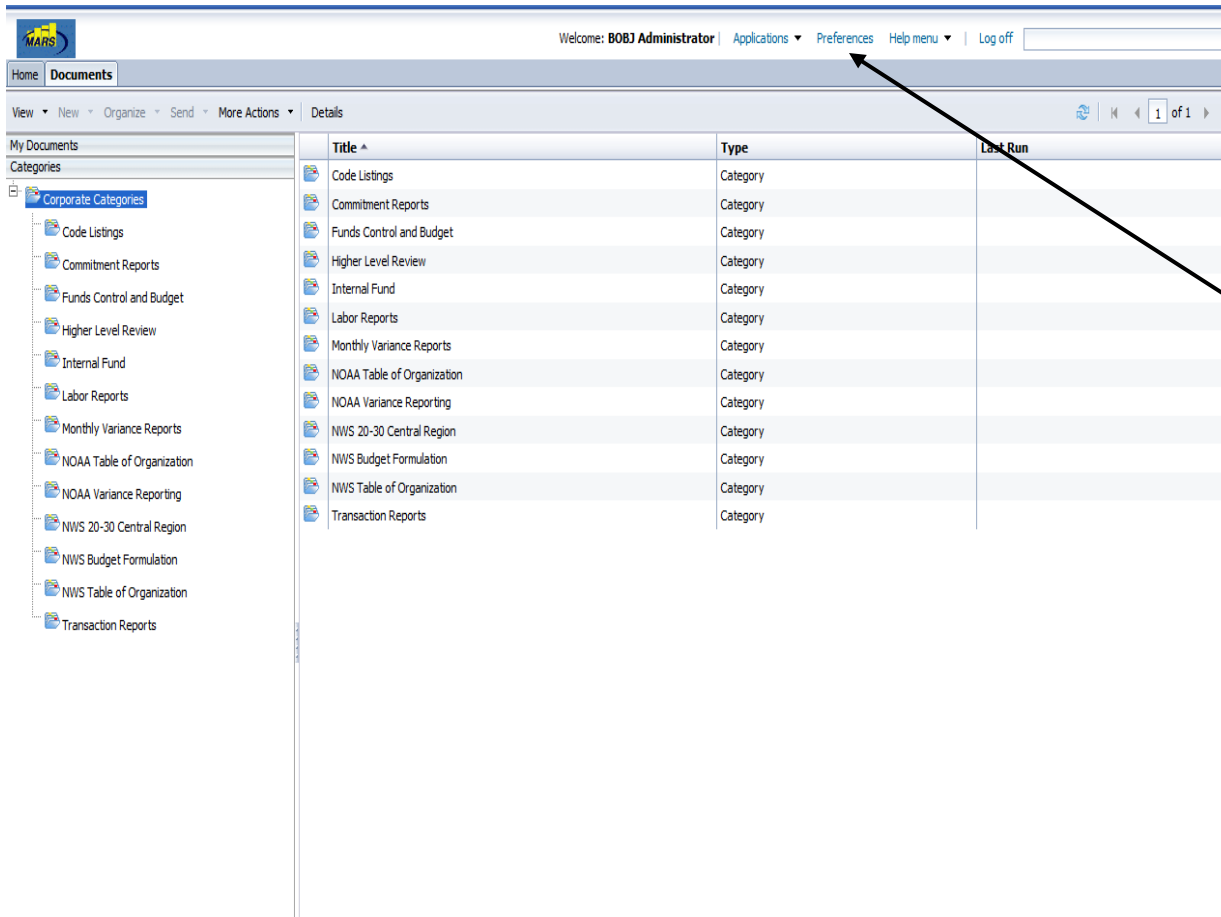
- Preference settings allow users to your preferred *Launch Pad Start Page* as well as other settings to control the default functionality.

- To set preferences, select the *Preferences* option.

- IMPORTANT NOTE: The following pages show how preferences should be set to match the exercises in this guide.

- After completing the *MARS Reporting & Querying User Guide*, feel free to set them based on your own individual preferences.

Setting Preferences: General Section
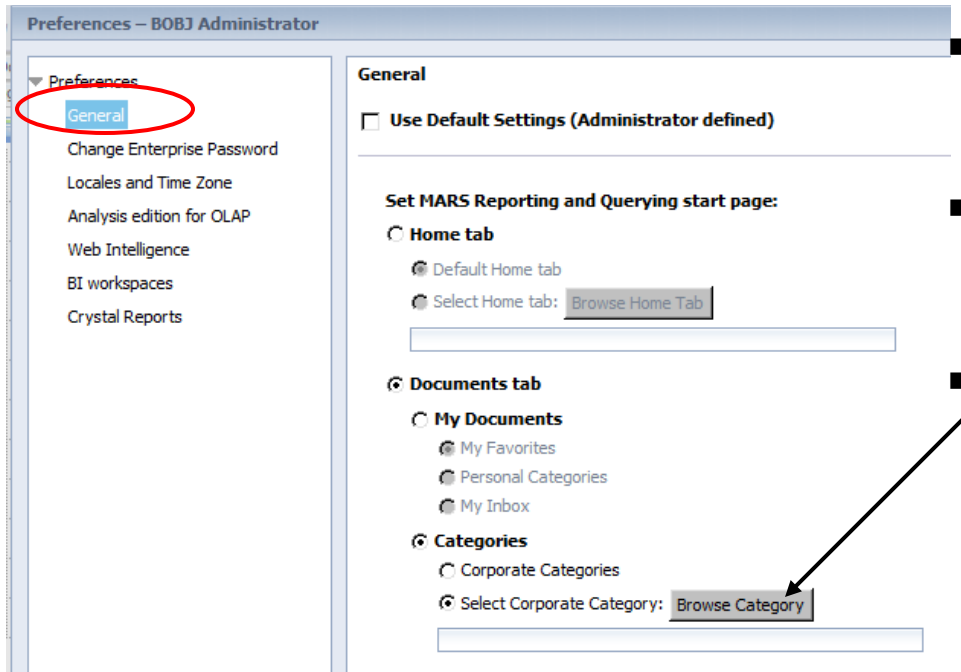
- Set your preferences as follows for the exercises in this guide. Starting with the General settings . . .

- Set MARS Reporting and Querying start page:
  - Documents tab
  - Categories
  - Select Corporate Category:
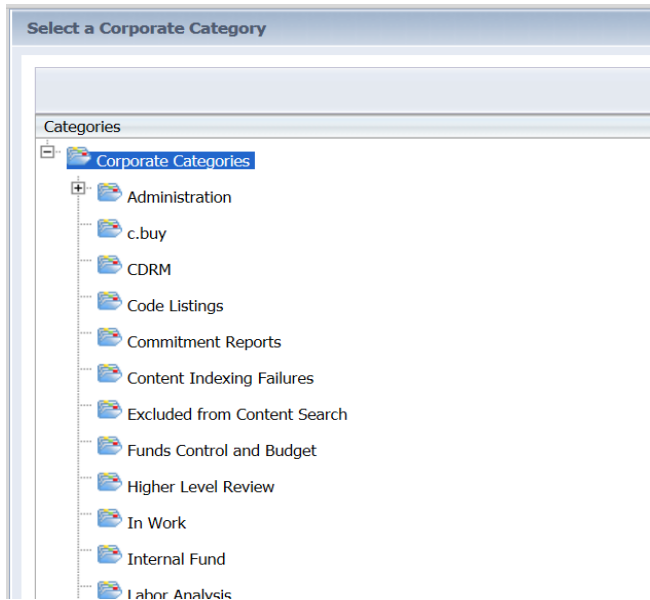
- Click Browse Category to select a default Category . . .

Setting Preferences: General Section

Select a Corporate Category

Categories

- ⊟ 📁 Corporate Categories
  - ⊞ 📂 Administration
  - 📂 c.buy
  - 📂 CDRM
  - 📂 Code Listings
  - 📂 Commitment Reports
  - 📂 Content Indexing Failures
  - 📂 Excluded from Content Search
  - 📂 Funds Control and Budget
  - 📂 Higher Level Review
  - 📂 In Work
  - 📂 Internal Fund
  - 📂 Labor Analysis

◉ **Documents tab**

  ◯ **My Documents**
    ◉ My Favorites
    ◯ Personal Categories
    ◯ My Inbox

  ◯ **Folders**
    ◉ Public Folders
    ◯ Select Public Folder: [Browse Folder]

  ◉ **Categories**
    ◯ Corporate Categories
    ◉ Select Corporate Category: [Browse Category]
    Monthly Variance Reports

- Scroll through the list of categories and select Monthly Variance Reports.

- Click Open to return to the preference option list.
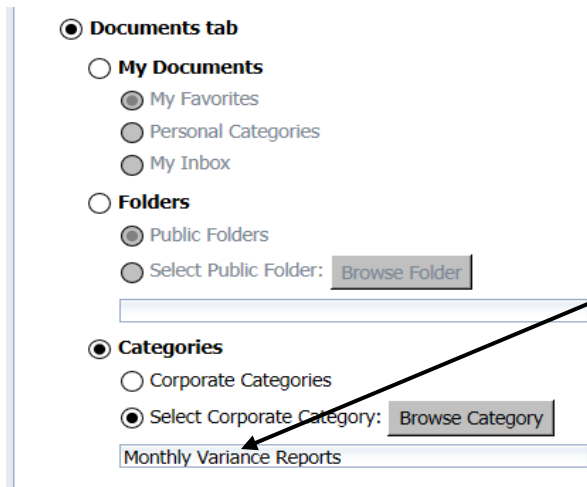
- Note the selected category.

17

Setting Preferences: Web Intelligence Section
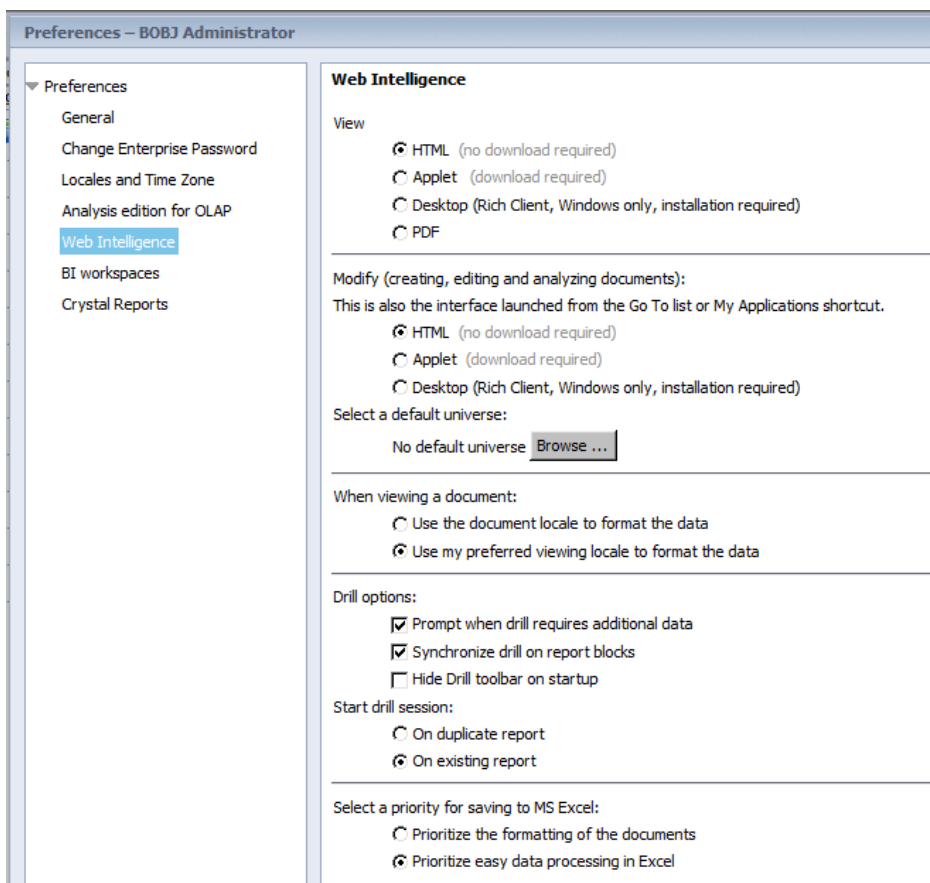
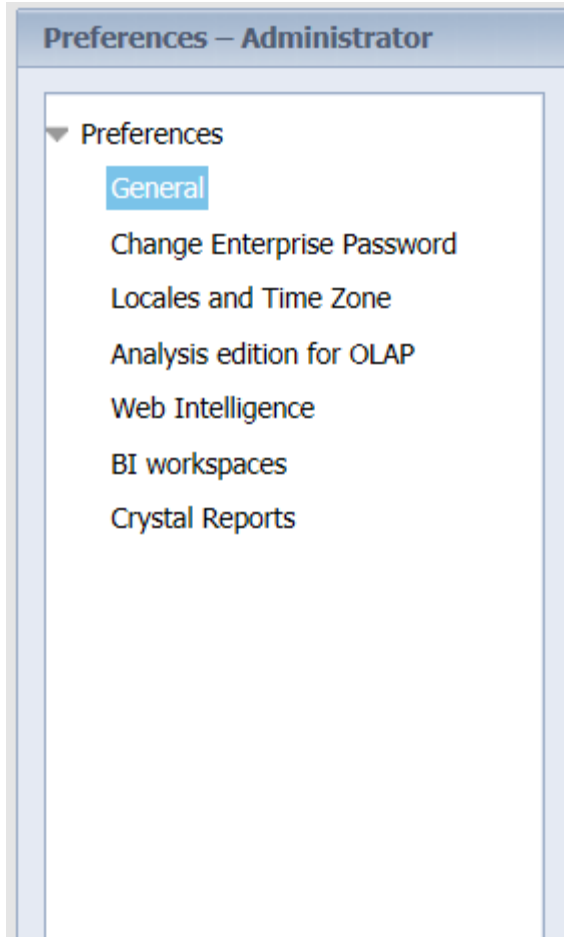- Scroll down to the Web Intelligence section. Click the section name to expand the list of options within the section.

- Select a default view format:
  - HTML
- Select a default creation/editing tool:
  - HTML
- When viewing a document:
  - Use my preferred viewing locale to format the data
- Select a default Universe:
  - No default universe
- Drill options:
  - Prompt when drill requires additional data
  - Synchronize drill on report blocks
- Start drill session:
  - On existing report
- Select a priority for saving to MS Excel:
  - Prioritize easy data processing in Excel

Setting Preferences: Change Password Section

Preferences – Administrator

Preferences		
▼ Preferences		
General		
Change Enterprise Password		
Locales and Time Zone		
Analysis edition for OLAP		
Web Intelligence		
BI workspaces		
Crystal Reports		

Change Enterprise Password

Change Your Enterprise Password

User Name: Administrator
Old Password:
New Password:
Confirm New Password:

- Scroll to the Password section. Click the section name to expand the list of options within the section.

- As a new user, you will be asked to change your password the first time you log in.

- Subsequently, you will be asked to change your password every 60 days.

- You may change your password at any time using this screen. (There is no need to change it at this time.)

19

Setting Preferences: Ignore Other Settings Sections

Preferences – Administrator

- Preferences
  - General
  - Change Enterprise Password
  - Locales and Time Zone
  - Analysis edition for OLAP
  - Web Intelligence
  - BI workspaces
  - Crystal Reports

- Please ignore the *Crystal Reports, Analysis edition for OLAP, BI Workspaces* settings**.**

Launch Pad Navigation

BI Launch Pad Navigation: List Panels

- Click the *Documents* tab to return to *Corporate Categories* view.
- Note that the screen is divided into two panels:
  - Navigation Panel
  - List Panel
- The *Navigation Panel* is used to browse *Personal Folders* & *Categories, Inbox* documents and *Corporate Categories*.
- The *Navigation Panel* provides a top-level view of folders and categories.
  Drawers are expandable panes on the navigation panel.
- The *List Panel* is where the objects within the selected folder or category are displayed.
- The *Tool Bar* is only available when the Navigation and List panel are displayed. It is used to view and manage objects.
- The *Tab Navigation Panel* on top is always displayed.

Launch Pad Navigation:

My Documents View
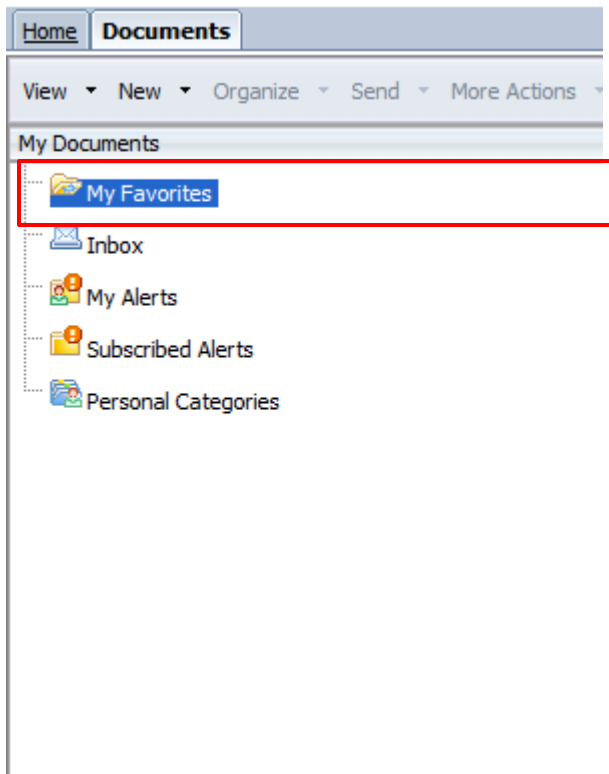
Categories View
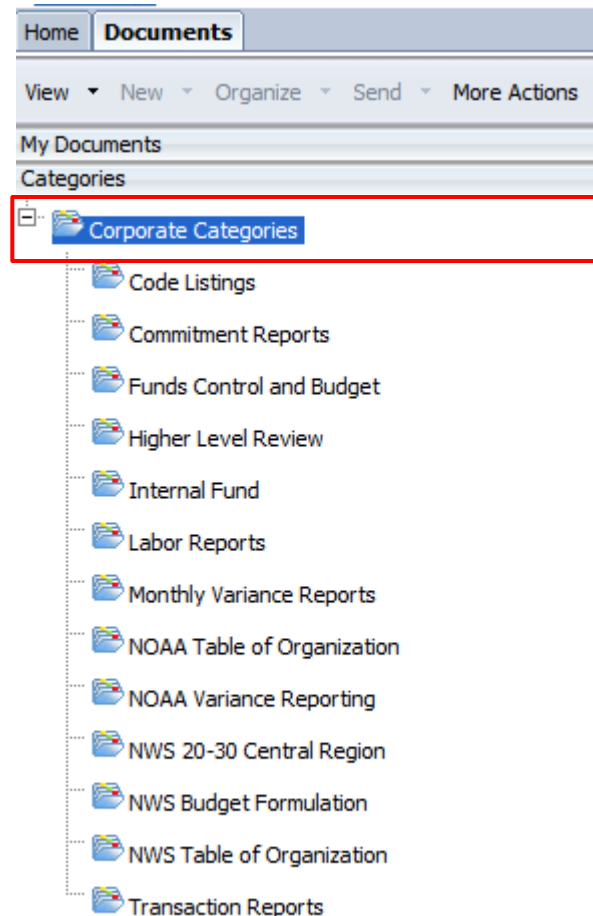
- Each document must be placed in a folder.

- Each document can be associated with zero, one or more categories.

- MARS has been configured to show **Corporate Documents** only in the Category View. Switch to *Category* View to see Corporate Documents.

- *Personal Categories* will be empty if you have not created your own categories. Switch to *My Documents* View to see Personal Documents

- The *My Documents* view is the only way to navigate to the Inbox.

- Practice toggling between the *My Documents* and *Categories* views.

 NOTE: You may not see some categories shown in these screenshots due to individual access rights

Launch Pad Navigation: Finding Documents by Name

Enter search criteria and press enter

Results of search
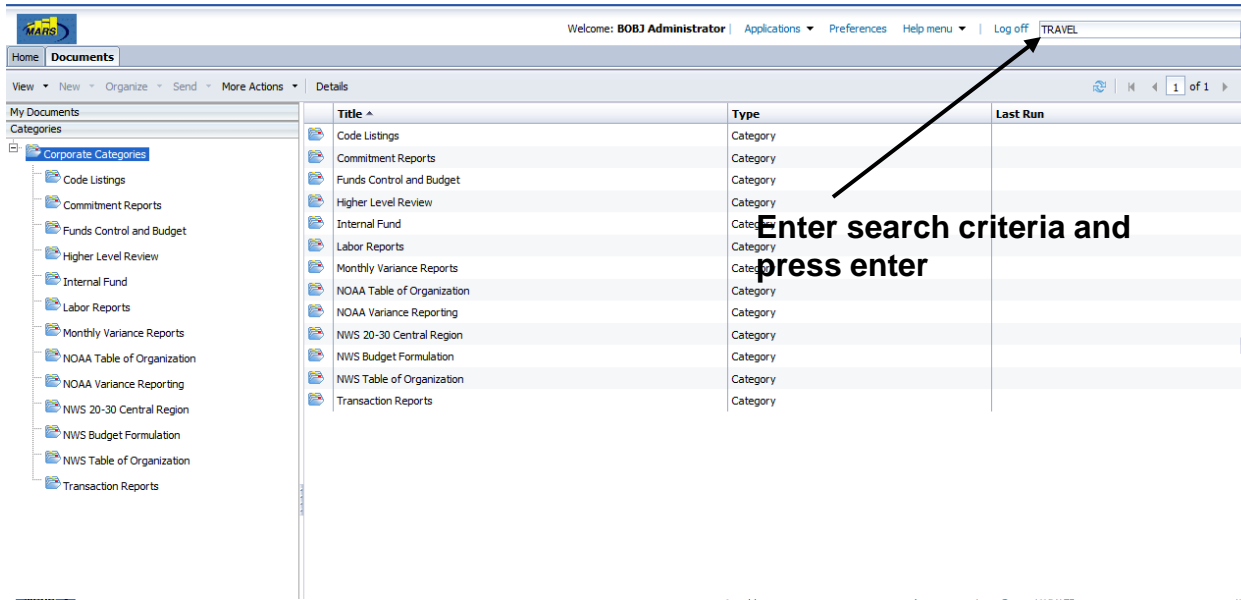
If you are looking for a particular document and are having trouble finding it in either the folder or category structure, use the *Document Search* facility in the *Launch Pad Tool Bar*.

For example, if you are looking for a document you know has 'Travel' in the name, simply type 'Travel' in the search field and press enter.
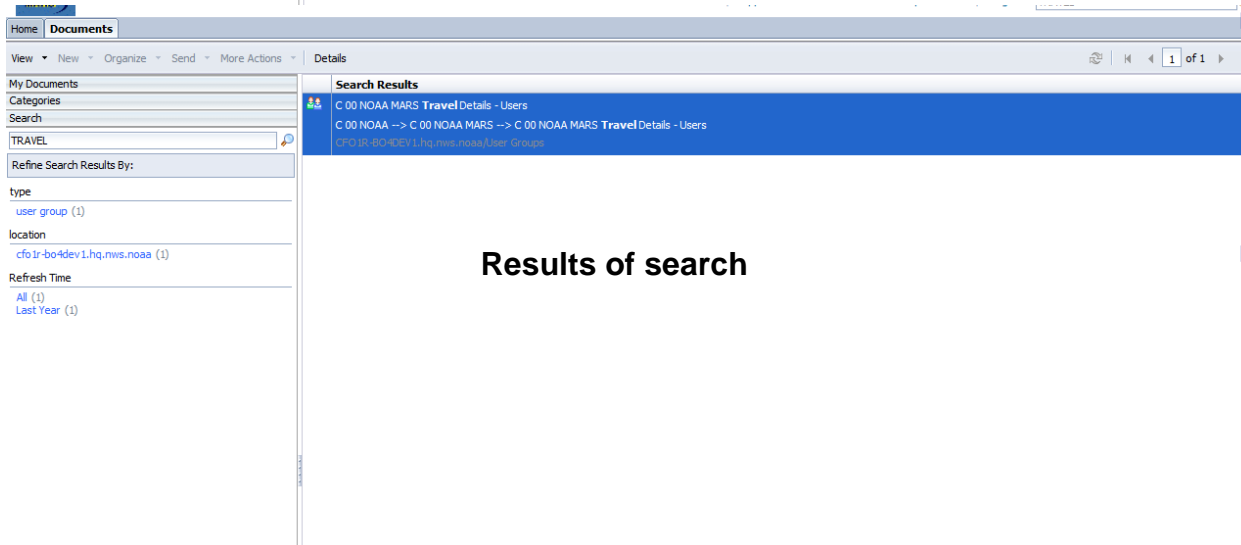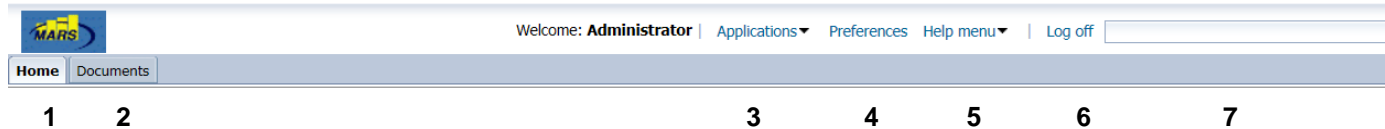
Matches to search text are automatically based on object's keyword, title, description, content, owner information

Click a facet in the *Search* drawer to refine the results.

Launch Pad Navigation: Menu Bars – Quick Reference

Main Menu Bar

1. **Home:** Go to Launch Pad Start Page as defined in your preferences
2. **Documents:** Display the document list you were last viewing
3. **Applications:** Used to open SAP applications
4. **Preferences:** Preference allows users to set their preferred Launch Pad Start Page as well as other settings to control the default functionality.
5. **Help menu:** Access on-line help (this help does not cover in-depth report creation)
6. **Log Off**
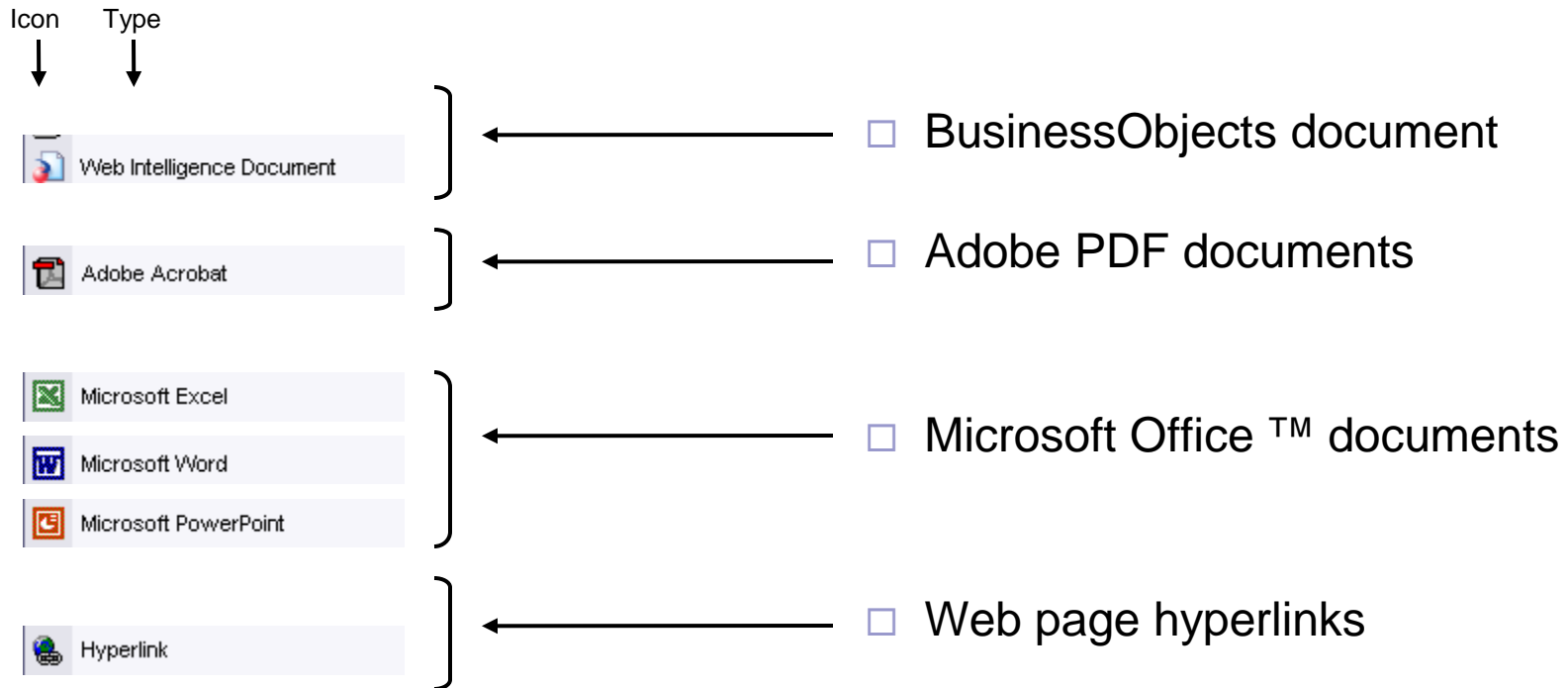7. **Search:** Search for a document by title or keyword

Launch Pad Menu Bar
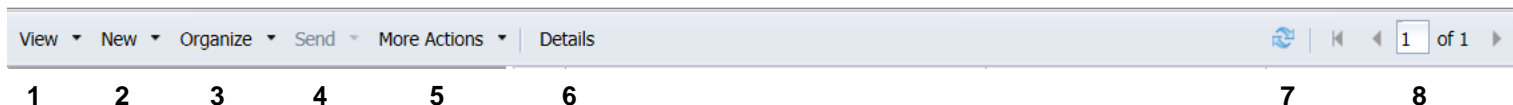
1. **View:** Open a selected report for viewing or displays report properties.
2. **New:** Create Category or Folder
3. **Organize:** Cut, copy, copy shortcut, paste or delete Personal Folder, Category or Document
4. **Send:** Send selected report to user's BusinessObjects Inbox.
5. **More Actions:** Copy and paste the link to share the folder.
6. **Details:** Display report summary.
7. **Refresh Navigation Panel and List Panel**
8. **Page Navigation**

Launch Pad Navigation: Document Icons

■ Documents other than BusinessObjects documents can be viewed in Launch Pad and discerned by their icon or type description.

Icon   Type

Icon	Type
	Web Intelligence Document

☐ BusinessObjects document

	Adobe Acrobat

☐ Adobe PDF documents

	Microsoft Excel
	Microsoft Word
	Microsoft PowerPoint

☐ Microsoft Office ™ documents

	Hyperlink

☐ Web page hyperlinks

Working with Documents

Working with Documents: Using a Corporate Document

- In this exercise we will show you how to use the MARS NOA118 – YTD corporate document.

- Be sure you are in *Category view* for this exercise.

- Click on the *Monthly Variance Reports* Category.

- To view a document, simply click on the document name in the *List Panel*.

- Or click on *View* on the Launch Pad toolbar.

Working with Documents: Refreshing Data

Refresh Data button

- The MARS team purges the query data before publishing reports.

- Therefore, when a corporate document opens, the report tabs will have no data in them by default.

- The user must click the *Refresh Data* button to retrieve the desired data.

- Upon refresh, the user may be prompted for parameters for retrieving the data.

- Click *Refresh Data*

Working with Documents: Filling in Prompts

Highlight the prompt to be answered. See below for options.

Type in value here or select from the list on the left.

* Default values have been filled in to the prompts.

* The user will need to change any prompt that has a question mark (?).

* The user should review all other prompts to be sure only the necessary data is retrieved.

* You may need to scroll down to see all the prompts that are available.

* To change a prompt value, click on the prompt in the upper part of the screen and either type in the desired value, or select it from the list of values in the lower part of the screen

* If the list of values is empty, click the *Refresh Values* button.

Working with Documents: Filling in Prompts

- Some prompts allow the user to select multiple values or '*' for all.

- If the user does not want all values, highlight the desired values in the list at the left, click the > button to move them to the selected values on the right.

- Be sure to remove the '*' from the selected values if you do not want all values. Use the < button to remove the '*' or any other undesired items.

- Click *OK* when you have finish selecting the desired values.

- Most documents will finish refreshing in less than 60 seconds.

Working with Documents: Navigating Within a Document

- The document should now have the desired data.

- If the report is still empty, click on Refresh Data again and carefully review the values entered in the prompts for potential mistakes.

Working with Documents: Navigating Within a Document

- There will be a panel to the left of the report. This panel is used to show the following features:
  - □ User Prompt Input
  - □ Navigation Map
  - □ Input Controls

- The icons of the left panel control which feature you see.

- The last feature you used will show as default.

Working with Documents: Printing a Document

- To print, click on the **_Export to PDF for printing_** icon on the menu bar.

- A PDF file of the entire document will be generated, click the **Open** button to display the document in Adobe Acrobat reader. In Adobe Reader, click the **Printer Icon** or Select **File | Print** from the main menu as per a normal windows program.

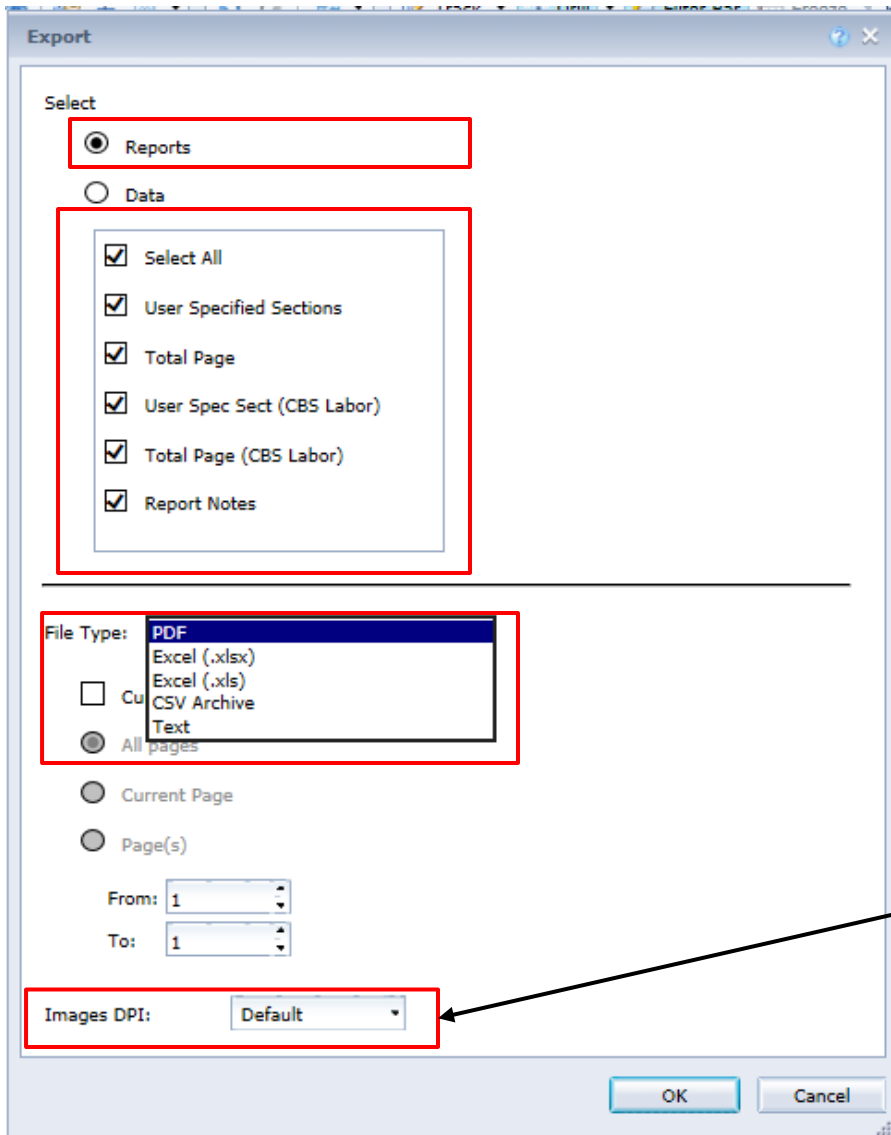# Working with Documents: Exporting Documents, reports or data

- To Export a document, report tab(s) or raw data, click on *Export to my Computer* icon. The **Export** window pops up.

Working with Documents: Exporting Documents, reports or data

- You can select whether you want to export a **complete document** or **specific reports** in text file, a PDF file, an Excel spreadsheet, a .CSV archive or a .CSV file.

- **PDF** and **Excel** will retain the formatting and groupings established in the Webi report.

- **Excel** will not include the header and footer displayed in the Webi report.

- A **text** file will keep the groupings and columns, but not the formatting (e.g., header row color) from the Webi report.

- A .**CSV** file will not retain the formatting nor the groupings displayed in the Webi report.

- The menu includes a new option to fine-tune a **DPI** value (dots per inch) for **PDF and Excel** files. Higher DPI values mean better image quality, but larger file size (typical values range from a black-and-white print standard of 72 DPI to many more depending on the paper, printer, and document).

- **Note**: WebI charts are automatically converted to images in Excel.

Working with Documents: Exporting Documents, reports or data

- The chosen file type will be generated.

- Click Open to open the file with the appropriate program, or Save to select a location to save the file. Depending on your browser, you may get a security prompt to download the file; follow the normal process for your browser to download the file.
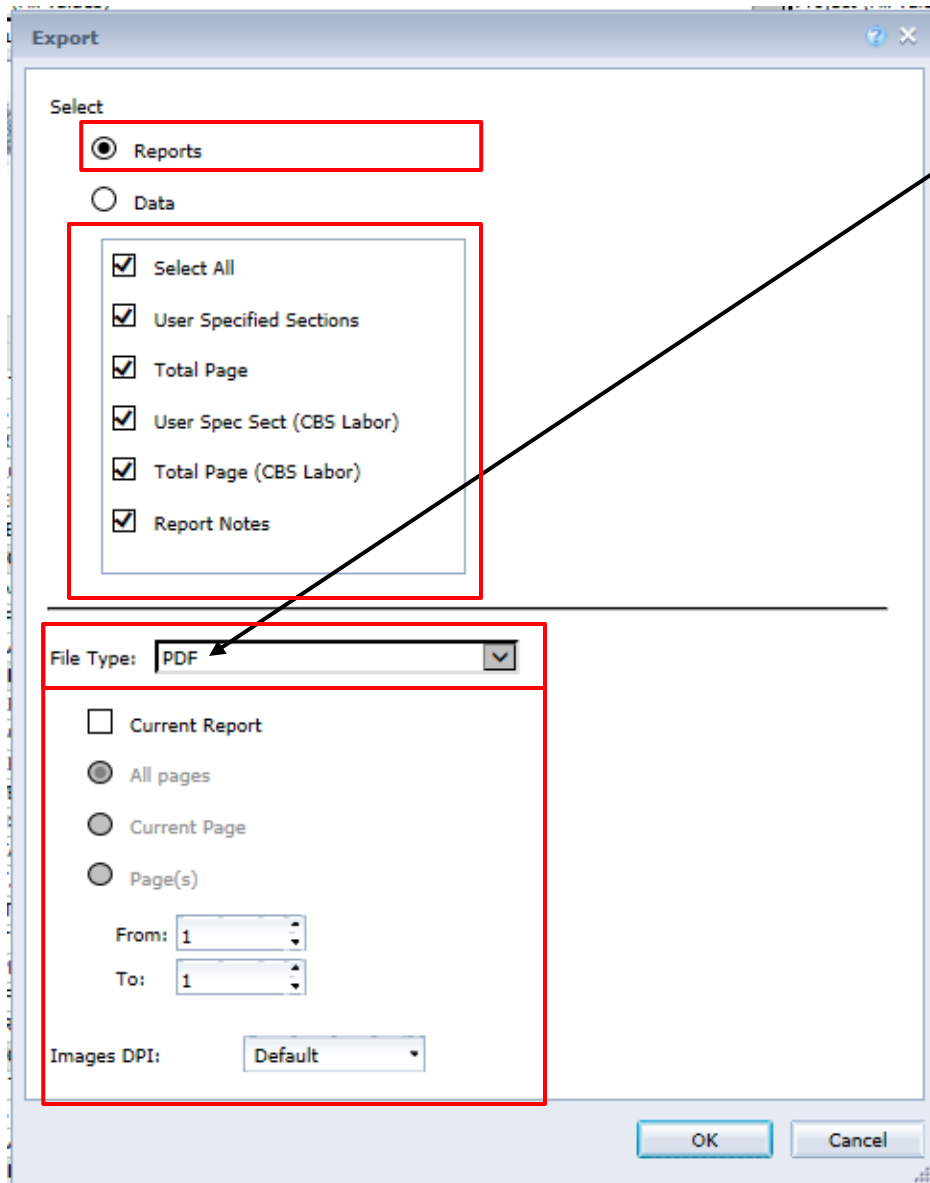
- Except for the text file format, each file type has several settings available when you're in the *Export* dialog box. They are detailed in the next slides.

43-XX	INTEREST & DIVIDENDS		0	0	93	-93	0.00%	0	204
	SUBTOTAL DIRECT LABOR & OTHER OBJECTS		0	0	9,112,584	-9,112,584	0.00%	0	29,057,363
11-1X	FULL TIME PERMANENT		0.00	0.00	8.87	-8.87	0.00%	0.00	49.29
11-3X	PERS COMP - ALL OTHER		0.00	0.00	0.07	-0.07	0.00%	0.00	0.40
77-88	LO OVERHEAD		0.00	0.00	0.00	0.00	0.00%	0.00	-0.05
	TOTAL FTE		0.00	0.00	8.94	-8.94	0.00%	0.00	49.64

Sections

Do you want to open or save **MARS NOA118 - YTD.pdf** (847 KB) from **marsbo.rdc.noaa.gov**?   Open   Save ▾   Cancel   ✕
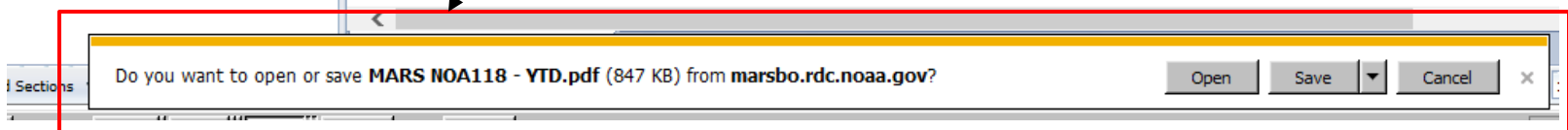
Working with Documents: Exporting Documents, reports or data

- When exporting in a **PDF file**, you can decide whether you want to export all reports if you have several reports in your document, or only the report you are currently viewing ("**Current Report**" option in the *Export* dialog box).

- If you decide to export only the report you are viewing, then it is possible to select whether you want to export:
  - □ All pages.
  - □ The current page.
  - □ Specific pages (example: pages 10 to 15).

Working with Documents: Exporting Documents, reports or data
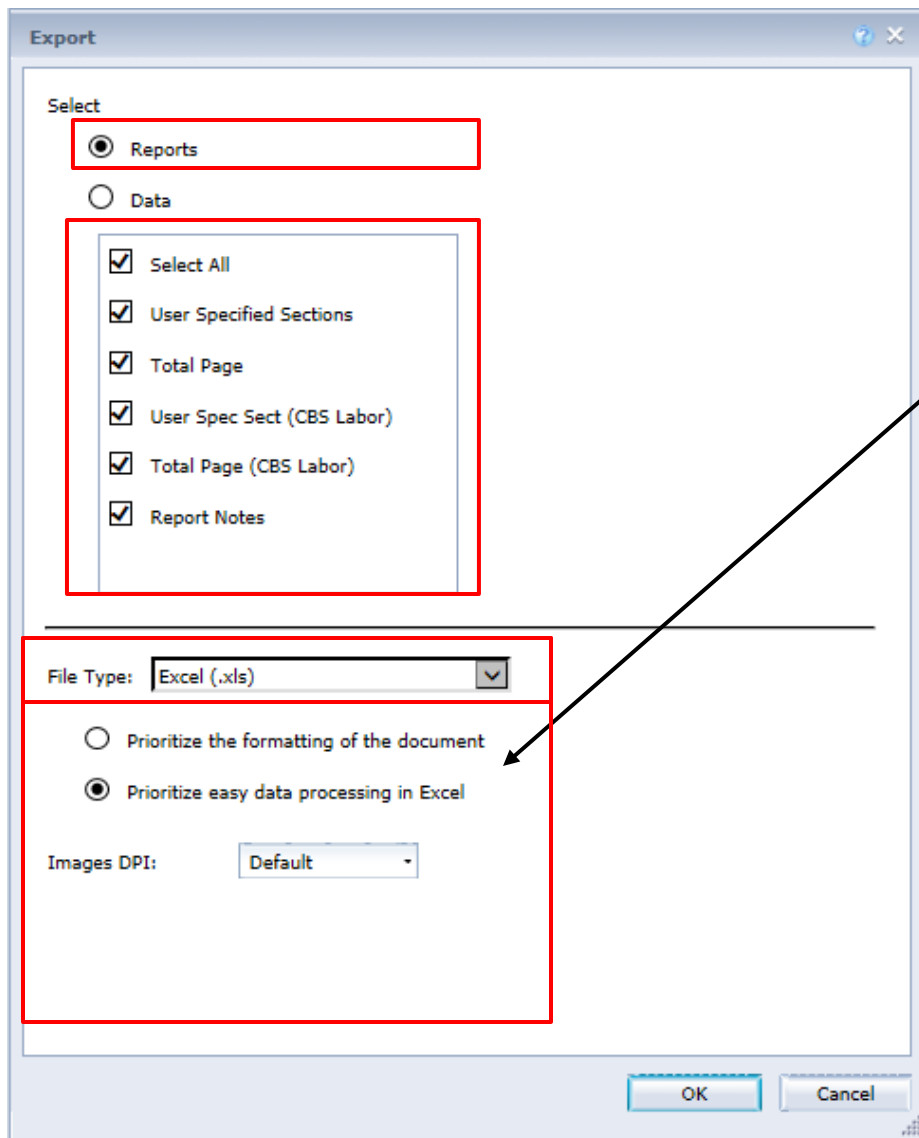
- When exporting to **Excel**, both **.XLS** (prior to Excel 2007) and **.XLSX** (Excel 2007 and onward) formats are supported.

- When exporting to **Excel**, you can select between two options:
    - ☐ Prioritize the formatting of the document.
    - ☐ Prioritize easy data processing in Excel.

- ***Prioritize the formatting of the document***: Select this option to have the layout and formatting of the document matched as closely as possible in the Excel file.

- ***Prioritize easy data processing in Excel***: Select this option to avoid merging multiple cells into Excel cells as much as possible to exploit the data processing features of Excel.

Working with Documents: Exporting Documents, reports or data
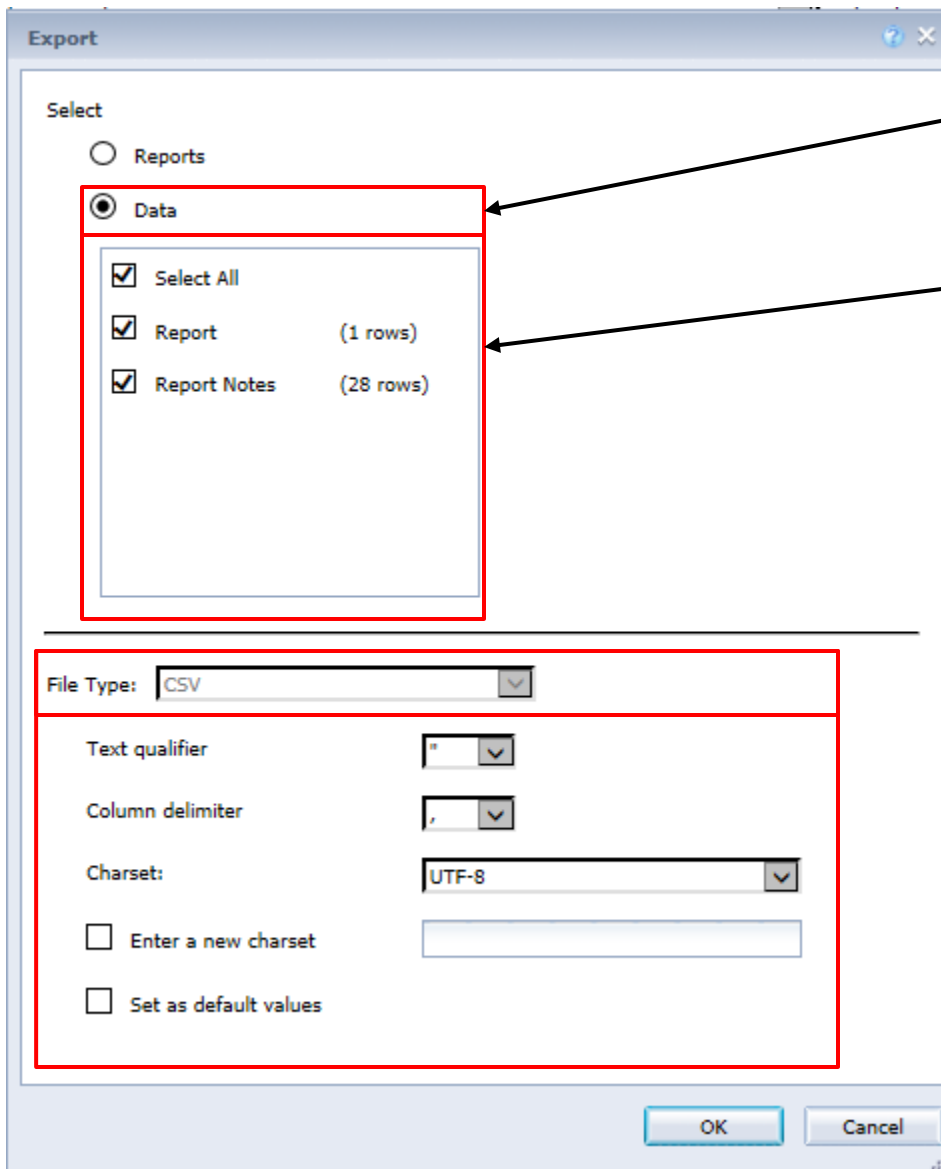
- The "**Data**" option allows you to export raw data (data without any formatting coming directly from the queries behind the report) to a **.CSV** file (only format available for raw data) that can be opened in Excel.

- You can select whether you want to export all data or only specific queries.

Getting Help

Help icon

- This *Querying & Reporting User Guide* only brings you through the basics of using BusinessObjects.

- We encourage users to explore the broader functionality of the product by reading the online help.

- To get access to these resources, click on the *Help* icon from the *Main Menu*.

Training Material available (on the MARS Portal under Training>Reporting & Querying)

- **Webinar**–Recorded step-by-step demonstration video, tailored to MARS users.

- The **"Business User" Guide** – This guide conveys basic concepts and step-by step directions for:
  - system log-on
  - system navigation
  - viewing and refreshing reports
  - saving reports
  - sending reports to other users

- The **"Power User" Guide** – This guide conveys more advanced concepts and step-by step directions for:
  - Creating Webi Documents
  - Filtering Document Queries
  - Report Formatting
  - Advanced Report formatting
  - Analytic Features
  - Cross-tab Reports

- **Web-Based Reporting Module Training via Knowledge Accelerator** – Knowledge Accelerator is a web-based training tool that simulates use of the reporting and querying module. Knowledge Accelerator provides the user with an understanding of how the screens flow and provides the opportunity to practice processes/operations in the tool (e.g., opening a report, refreshing a report, etc.).

MARS Support Information

- **Hours: Mon-Fri 7:30 am - 5:30 pm EST**

- **Contact Information**

  - **Email**
    - **mars.support@noaa.gov**
  - **Phone**
    - **(301) 427-8888**
  - **Fax**
    - **(301) 713-1742**