
ReportMart1 User Guide

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Overview

What is ReportMart1

ReportMart1, a web-based system used to access distributed administrative reports, is one of the standard reporting tools for administrative systems at Stanford.

From ReportMart1, you can access summary and list information upon which you need to report. This information can then be displayed on the screen, exported to Excel or printed in a variety of formats.

ReportMart1 is a business information portal, providing access to various sources of information. ReportMart1 allows you to quickly locate the information (e.g., documents, reports) you need. You can view documents and reports and/or save them as files on your system. ReportMart1 also allows you to open and process reports.

With ReportMart1, you can personalize your view of information display. You can set up personal Portal.Pages that display information you frequently access, whether documents, jobs, or web sites.

Where Can I Find ReportMart1?

ReportMart1 is available at: <https://reportmart1.stanford.edu>

Who Uses ReportMart1?

ReportMart1 is used by the Campus Community. It can be used by PC-users (by way of Internet Explorer) as well as Macintosh-users (by way of [Connect](#)).

Why Should I Use ReportMart1?

ReportMart1 was created to meet the reporting needs of several major administrative systems at Stanford, including PeopleSoft, Pinnacle, Kronos, and STARS. As such, it provides a common reporting environment and common set of tools for end users and developers.

What Determines My Access to Data and Reports through ReportMart1?

Your role in the University and the organization in which you work determine which categories/folders you can see and to which content you have access. ReportMart1 access is updated based on access granted in the source systems (PeopleSoft, Kronos, Pinnacle, STARS, etc.)

When Will My Data Appear in My Reports?

ReportMart1 is a repository for storing reports, static documents, and links to other web sites. It does not contain data. Each night, some systems run a process to add the current day's data from their production system to their reporting files. When reports are run in ReportMart1, they are actually retrieving the data from the source system data files.

Some systems have only real-time data and some systems have day-old or reporting data. For most reports data are retrieved from reporting data. For example, PeopleSoft has reporting data. For reports that use the PeopleSoft reporting database, information entered or modified in PeopleSoft systems **today** will display in ReportMart1 **tomorrow**.

ACCESSING REPORTMART1

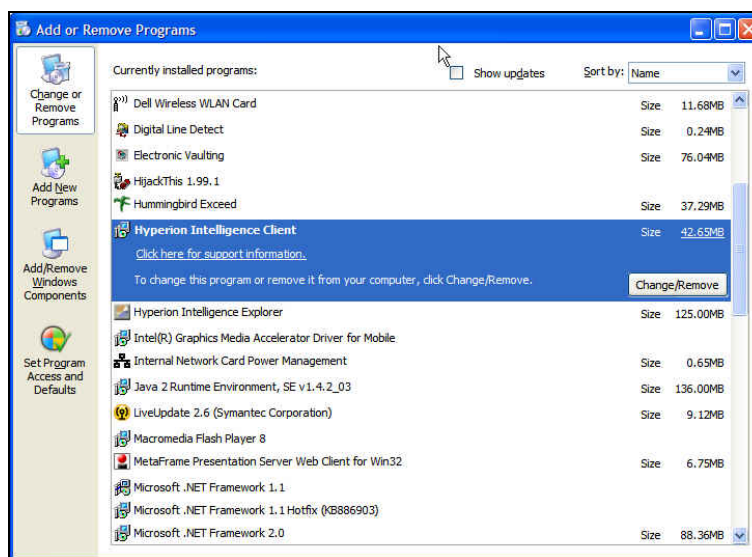
Using a PC to Access ReportMart1

PC users will access the ReportMart1 portal using the following URL: <https://reportmart1.stanford.edu>. The '1' is now included in the URL to minimize confusion between ReportMart1 and ReportMart3 (see the [ReportMart page](#) for a discussion of each ReportMart). The following PC browsers can be used to access ReportMart1: Microsoft Internet Explorer 6.0 and Firefox 1.0.7. The following Windows operating systems are supported: Windows 2000 Professional, Windows 2003 and Windows XP Professional.

The ReportMart1 portal contains two types of reports: BQY and SQR. Almost all reports in ReportMart1 are BQY reports. BQY reports can contain many sections including formatted reports, result sets and pivots. BQY reports require the Hyperion Intelligence client (plug-in) to run. Users can easily manipulate reports and result sets. A small number of Pinnacle reports in ReportMart1 are SQR reports. These reports are highly formatted reports that can be scheduled and do not allow for user manipulation of the results. SQR reports do not require the Hyperion Intelligence plug-in to run.

The first time that a PC user opens a BQY report in the new portal, s/he will be prompted to install the Hyperion 8.5 plug-in. Only users with power user privileges (or greater) on a machine will be able to install the plug-in. The plug-in installation will take approximately 1-2 minutes depending on the options selected. Please review the [plug-in installation instructions](#) prior to installation. In addition, users can view a [2-minute flash demonstration of the plug-in installation](#).

Prior to installation, it is important that users turn off all pop-up blockers. For more information on turning off pop-up blockers see: https://docushare.stanford.edu/Get/File-40726/40726_PopUp_Blockers.doc. Additionally, on some machines, users may be prompted to allow the installation of the plug-in (an ActiveX control). To allow the installation of an ActiveX control, click on the yellow bar below the toolbars in Microsoft Internet Explorer and click OK on the message box that asks if it is ok to install the software. Once the plug-in is installed, the program will appear in the Add or Remove Programs list in the Control Panel (see below).

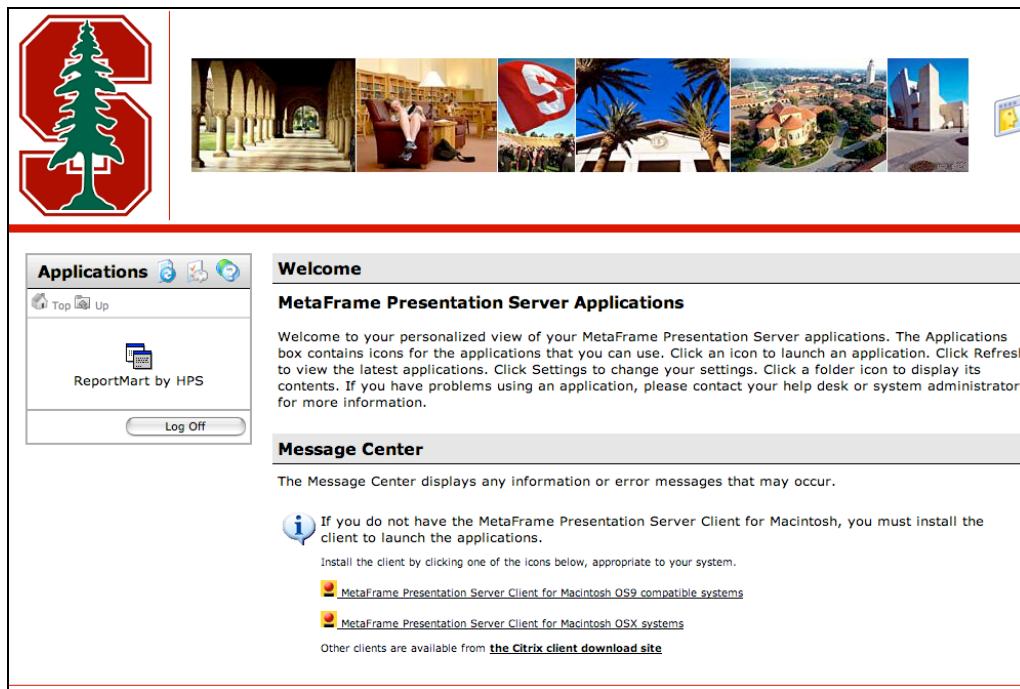


When the plug-in has been installed the user is able to run or process BQY reports in the ReportMart1 portal.

Using a Mac to Access ReportMart1

Mac users will access the ReportMart1 portal using Connect via the following URL: <http://connect.stanford.edu>. The following Mac browsers can be used to access ReportMart1: Safari (highly recommended), Microsoft Internet Explorer, Netscape, and Firefox.

Within the Connect environment, only the Local Client is available for Mac Users. If you receive error messages when accessing ReportMart1, make sure that the correct version of the Local Client is installed on your machine. In addition, you may need to associate the '.ica/' extension with Citrix. (Note: A user must have administrator privileges on a machine to install the Local Client.) Before installing a new Local Client, all older versions of Citrix should be uninstalled. Supported versions of the client are available on the Connect site (see links at bottom of screen in screenshot below).



NOTE: PC users can access ReportMart1 via <http://connect.stanford.edu>. This is particularly helpful if the user is having problems with the plug-in or is accessing ReportMart1 using a computer on which s/he does not wish to install the plug-in (i.e. public workstation).

REPORTMART1 UPGRADE ON JULY 31, 2006

Why is ReportMart1 Upgrading?

The current version of the software behind ReportMart1 (Brio 6.6.4) is no longer supported by Hyperion Solutions Corporation. Therefore, Stanford must upgrade to a more recent version (Hyperion V 8.5) in order to retain vendor support. (Note: Hyperion Solutions Corporation recently purchased Brio, thus the name change.) The upgrade will provide improved system administration with **relatively few changes directly impacting end-users**. (View sample [screenshot](#).)

Changes to ReportMart1

- For PC users, the URL to access ReportMart1 is now <https://reportmart1.stanford.edu> (the 1 has been included in the URL to [minimize confusion between ReportMart1 and ReportMart3](#))
- For Mac users, the URL to access ReportMart1 is <http://connect.stanford.edu>
- Report numbers are now part of the report names throughout the portal. Please use the report numbers when submitting HelpSU tickets.
- The *My ReportMart Reports report is now titled \$My ReportMart1 Reports. This report will now include SQR reports as well as BQY reports.
- A few reports and categories have been rearranged. (Obsolete/unused folders and reports have been removed)
- A new 'Alert' message system has been implemented to easily inform users of ReportMart1 announcements and news.
- In some reports, an 'Export Results' button is included on the introduction page. Most of the reports with 'export' button will export differently in the ReportMart1/Hyperion 8.5 portal. (See 'Exporting Data' section below.)

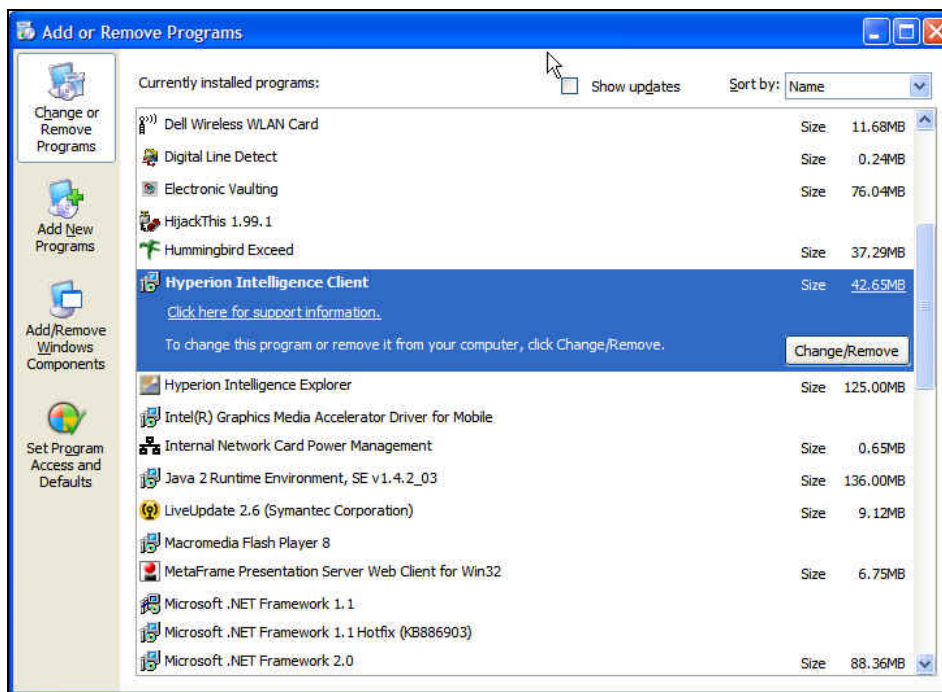
The ReportMart1 upgrade will impact users in the following ways:

- Some reports have been modified to save without results - This issue is significant for users who use ReportMart1 to save sets of data in their reports. A change in how Hyperion handles BQYs required developers to modify the save settings. In the reports with the modified settings, data (or result sets) are not retained, by default, when reports are saved to the desktop. To save data with a report, a user will need to change the Save Options (found under the File menu) by selecting sections in the Save Query Results with Document section. We hope that this change will be temporary.
- Exported sections will default as HTML rather than .xls or .csv file types
- Users will need to recreate all bookmarks and favorites currently stored in ReportMart1. To view a report of bookmarks and favorites that existed in the former ReportMart1 system, open the 'RM1 Brio Bookmarks and Favorites (RM1_RM101)' report.
- Users must resave all .bqy files that have been saved to the desktop.

Accessing ReportMart1 with a PC, the first time after the upgrade

The first time that a PC user runs a BQY report in the new portal, s/he will be prompted to install the new Hyperion 8.5 plug-in. Only users with power user privileges (or greater) on a machine will be able to install the plug-in. There is no need to uninstall the Brio 6.6.4 plug-in before installing the new plug-in. The Hyperion V 8.5 plug-in installation will take approximately 1-2 minutes depending on the options selected. Please review the [plug-in installation instructions](#) prior to installation. In addition, users can view a [2-minute flash demonstration of the plug-in installation](#). In the past, users have had to add ReportMart1 to their trusted sites in the Microsoft Internet Explorer properties. The new version of the plug-in no longer requires this step.

Prior to installation, it is important that users turn off all pop-up blockers. For more information on turning off pop-up blockers [click here](#). Additionally, on some machines, users may be prompted to allow the installation of the plug-in (an ActiveX control). To allow the installation of an ActiveX control, click on the yellow bar below the toolbars in Microsoft Internet Explorer and click OK on the message box that asks if it is ok to install the software. Once the plug-in is installed, the program will appear in the Control Panels Add or Remove Programs list (see below).



When the plug-in has been installed the user is able to view BQY reports in the ReportMart1 portal.

Re-create Saved Reports

Reports that have been saved to local machines from the ReportMart1/Brio 6.6.4 portal cannot be reprocessed in the new ReportMart1/Hyperion V 8.5 portal. It will still be possible to open and view reports and results saved from the Brio 6.6.4 portal in a browser.

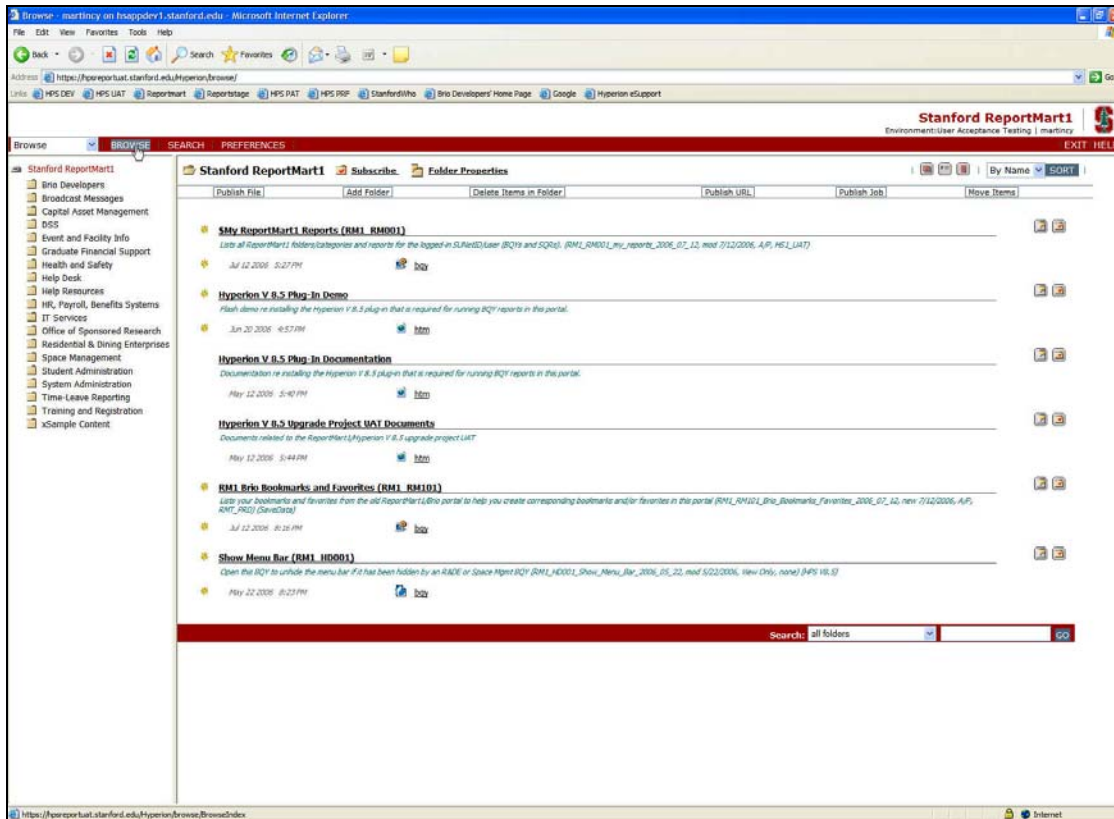
To reprocess and get new results, users must recreate and save the reports to the local machine from the new Hyperion V 8.5 portal. Users will notice that reports saved to the local machine from the new portal are saved with the report name (rather than the file name). For example, the default file name for the \$My ReportMart1 Reports report will be '\$My ReportMart1 Reports (RM1_RM001)' (rather than the file name "RM1_RM001_my_reports_2006_07_12.bqy").

ONE SIGNIFICANT ISSUE FOR USERS WHO SAVE RESULT SETS WITH REPORTS TO THE LOCAL MACHINE: A change in how Hyperion handles BQYs required developers to modify the save settings in some ReportMart1 reports to not retain data by default when reports are saved to the desktop. The reports that, by default, will not save result sets can be identified by the 'SaveData' tag found at the end of the description of the report in the portal. To save data with these reports, users will need to change the Save Options (found under the File menu) by selecting sections in the Save Query Results with Document section. If the user fails to change this setting ALL DATA WILL BE LOST WHEN SAVING THE REPORT TO THE LOCAL MACHINE. For instructions on how to change the setting view the 2-minute [Saving Results with Your Report](#) demo. We expect this change will be temporary.

USING REPORTMART1

Browsing Folders and Categories

Use the Browse tab to view all of the reports to which you have been granted access. Reports are arranged in folders for easy navigation.



Folders Arranged for Navigation

To view the contents of a folder, simply click on that folder. For example, to view the contents of the folder labeled "Broadcast Messages", click on the folder with that title.

Finding Reports in ReportMart1

Obtaining a List of Reports to Which You Have Access

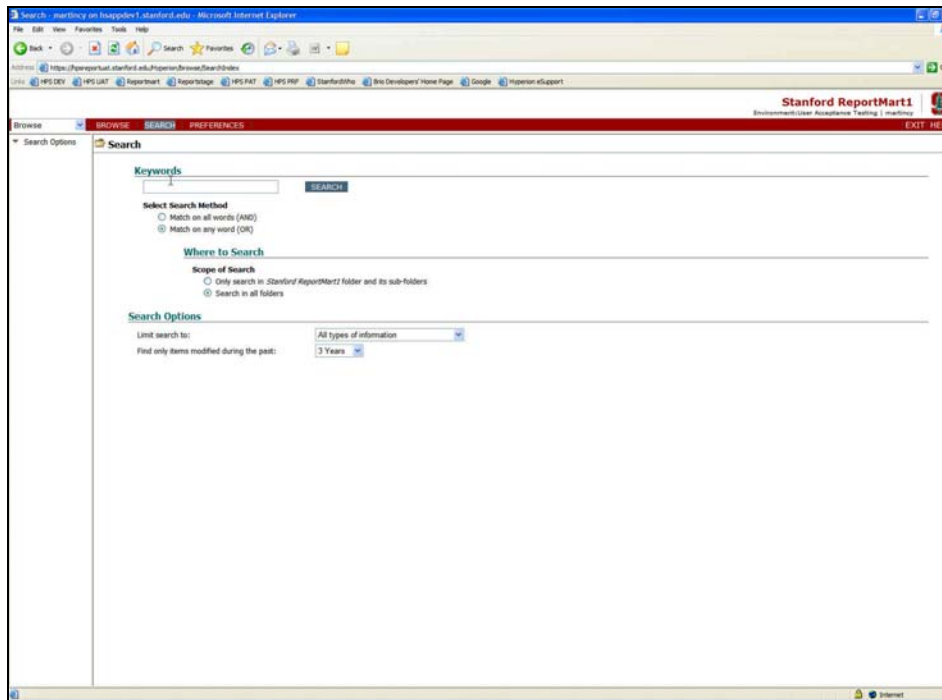
To obtain a listing of your reports, complete the following steps.

1. Click on the Browse tab.
2. The categories to which you have access are listed on the left (in the Navigation frame). Everyone has access to the reports under the "Stanford ReportMart1" category (folder). These are listed within the Content frame. Click on "Stanford ReportMart1" in the Navigation frame.
3. Click on the report titled, "\$My ReportMart1 Reports" - a listing of all ReportMart1 folders, categories and reports for the logged-in SUNet user.
4. This will open a separate browser window containing an Introduction page. Click on the "Process Query" button that appears in the "Introduction" page.
5. After your query is processed, you will see an "Introduction" page. All of the reports to which you have access will be listed here.
6. When you close the "Introduction" page, click on the "No" button when prompted "Save Changes?"

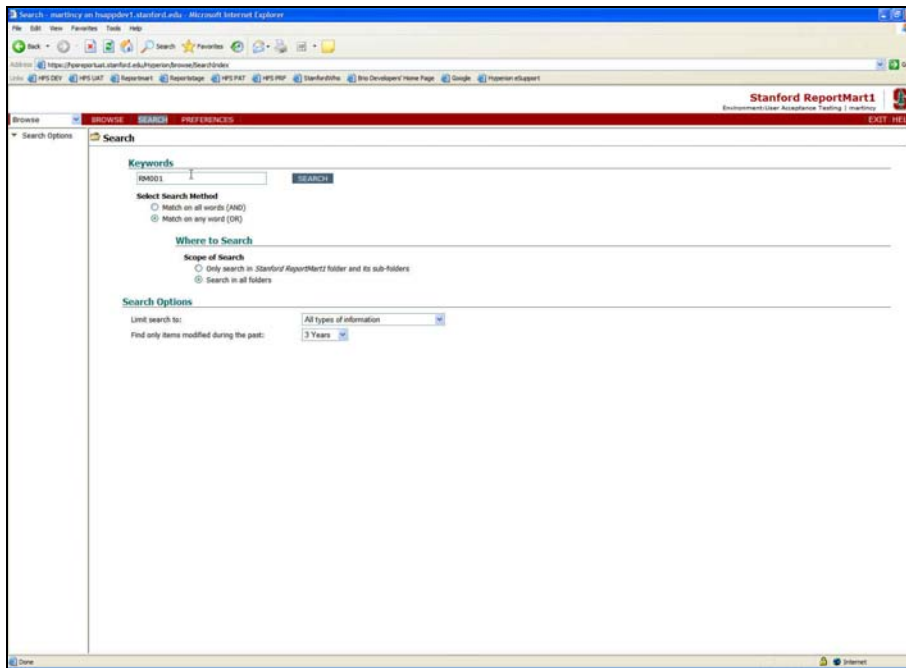
Searching for a Report

The search function in the new ReportMart1 portal has improved. Keywords are automatically generated for each report from the report name, description, and section names. It is now possible to find reports using a keyword or the report number. To search for a specific report complete the following steps.

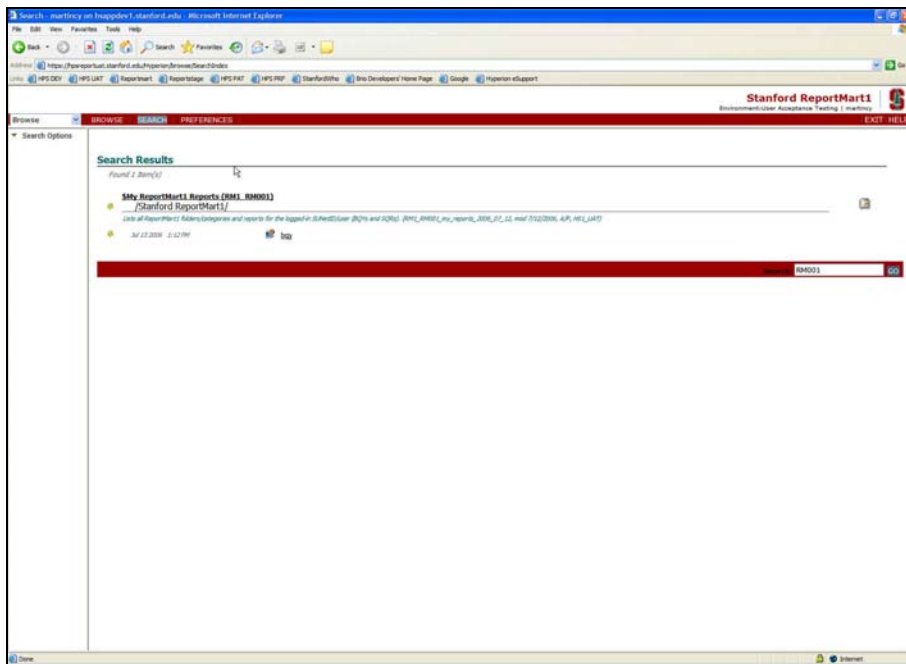
1. Click on the Search tab. The screen below appears:



2. Enter a keyword or a report number in the top text box. 'RM001' is entered as an example in the screen below.



3. Click on the 'Search' button and a list of reports that match the keyword or report number entered will display on the screen.

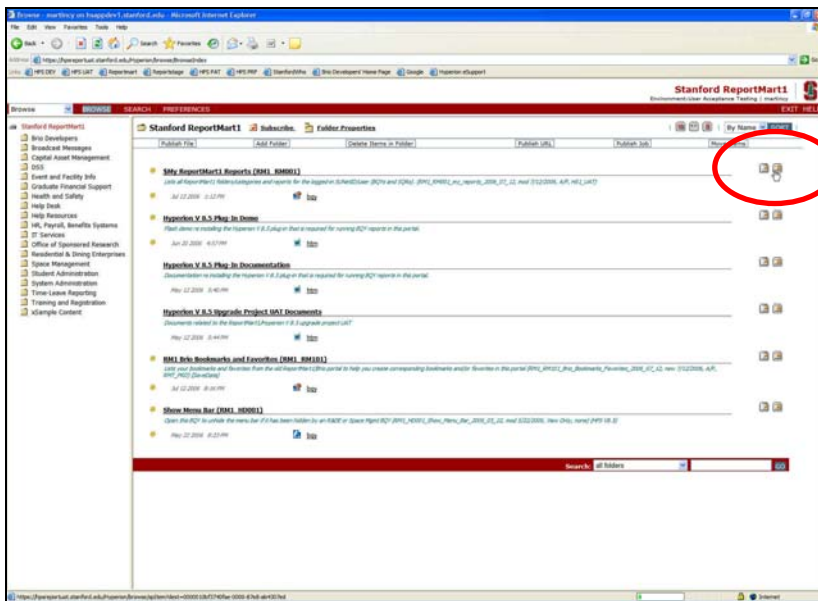


4. Click on the name of the report to view the report.

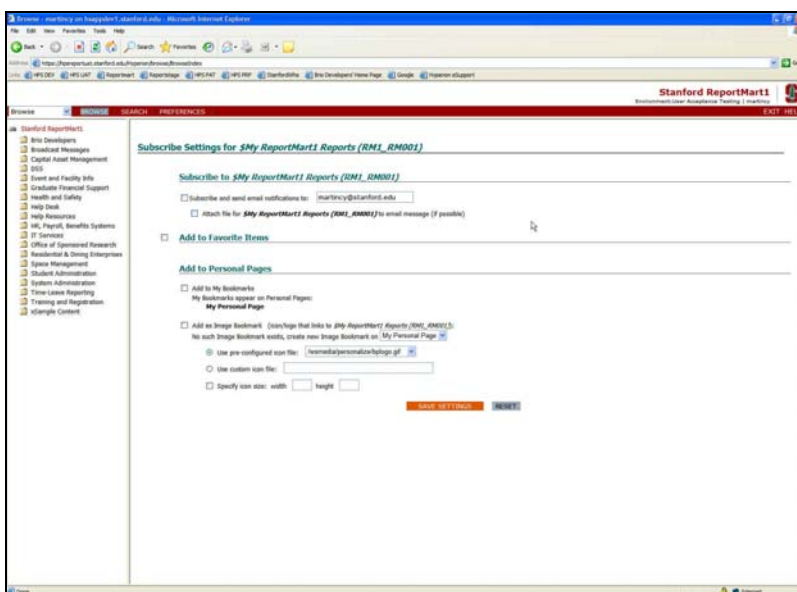
Subscribing to Reports (Creating Bookmarks and Favorites)

If you will be using a report more than once, it may be helpful to subscribe to the report by adding the report as a bookmark or favorite. If you had bookmarks and favorites in the old Brio portal, you will need to recreate these in the new ReportMart1 portal. To review your old bookmarks and favorites, run the new RM1 Brio Bookmarks and Favorites (RM1_RM101) report.

To subscribe to a report, click on the 'Subscribe' icon at the right of the screen in the content pane.



The 'Subscribe' screen appears. Select the appropriate check-boxes to add the report as a Favorite and/or Bookmark. To save your settings, click on the 'Save Settings' button.

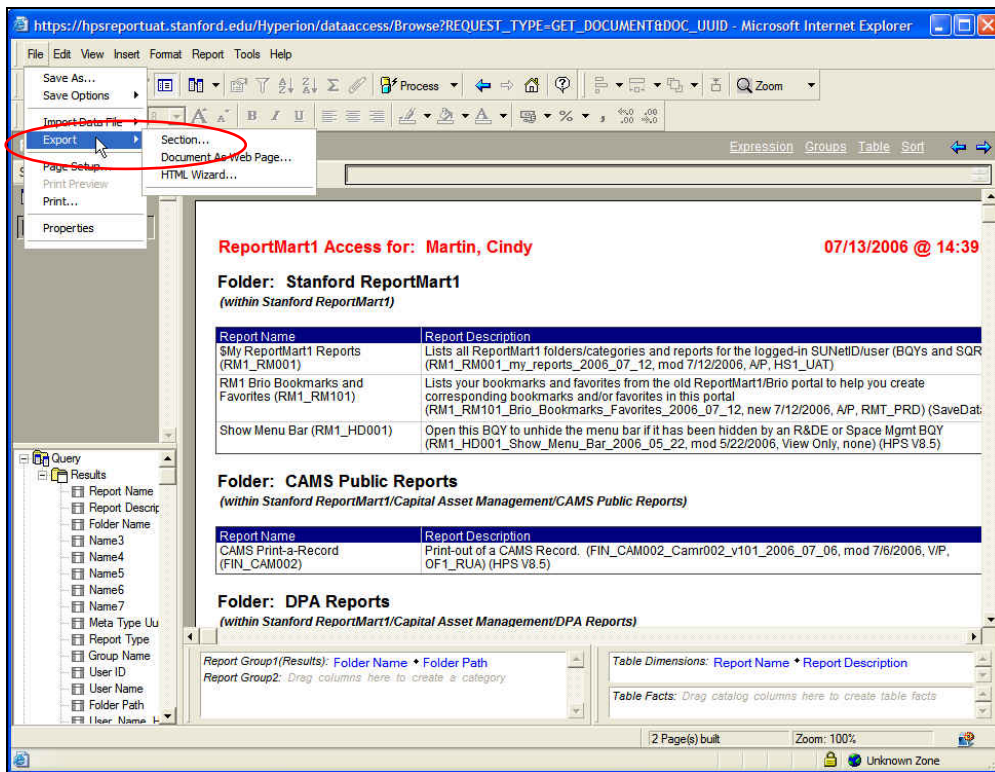


Exporting Data

In some cases, you may wish to save only a portion of the report. In this case, rather than saving the entire report, a section of the report can be exported. If you're exporting a table section, you can choose .xls; if exporting a formatted report, you can choose .pdf, and it will preserve the format (e.g., fonts, headings, shading, etc.) that you see online

To Export a Section on a PC, Complete the Steps Below.

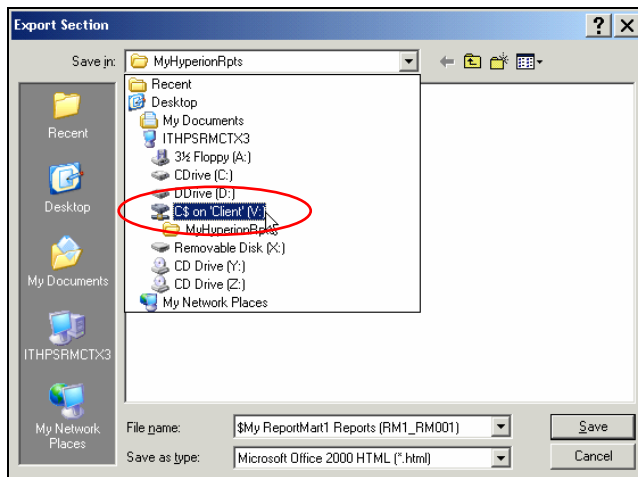
1. Open and process the report.
2. Select the section to export.
3. Choose File > Export > Section... from the menu.



4. Navigate to the folder where the report will be saved.
5. The default format for exporting is HTML. If you want to save your result set as an Excel (i.e., xls, csv) or PDF file, you will need to change the file type, using the 'Save as Type' field.
6. Rename the file, if desired (give it a name that is meaningful, one that you will remember), and click 'Save'.

To Export a Section on a Mac, Complete the Steps Below.

1. Open and process the report.
2. Select the section to export.
3. Click on File > Export > Section.
4. In the dialog box that appears, click the Save on the drop-down and select **Desktop > ITHPSRMCTX#> C\$ on 'Client'(V:)**, where '#' is a 1-digit number (1, 2, etc.); the drive letter may be 'V' or another value, depending on your computer's configuration.



Note: If you don't see an option that looks like **C\$ on 'Client'(V)**, please file a HelpSU ticket.

5. Navigate/browse to the folder where the report will be saved. You can also export your file to **C\$ on Client** (your hard drive).
6. The default format for exporting is HTML. If you want to save your result set as an Excel (i.e., .xls, .csv) or PDF file, you will need to change the file type using the 'Save as Type' field.
7. Rename the file, if desired (give it a name that is meaningful, one that you will remember), and then click 'Save.'

General Export Information

In some reports, an 'Export Results' button is included on the introduction page. Most of the reports with 'export' button will export differently in the ReportMart1/Hyperion 8.5 portal. The changes include:

- Headers no longer are included in the exported file (a few reports).
- Excel file will open before the user saves (formerly the user saved the exported file and then opened).

Unfortunately, the export buttons do not work for some versions of Excel. As a workaround it is possible to export data to an external file using the copy-paste method. To use this method, select a result set by clicking in the upper left hand corner of the result set. Next, use the menu to copy the selection. Open a text document (Notepad, Wordpad etc) and paste the results into the text document. Save the text

document. Open the text document from Excel. When prompted, define the data type of each column (this is especially important for date and number columns). Finally, click OK to import your data into Excel.

Note: It is also possible to paste the copied result set directly into Excel; however, it is possible that leading zeros may be removed from number columns when pasting directly into Excel.

Saving Reports

If you manipulate or modify a report (add limits, add/remove columns, change formatting etc), you can save these modifications outside of the ReportMart1 portal. Saving reports is different from saving or exporting only the data. When you save a report, you are saving *all* of the sections that it contains, as well as the data retrieved (with the exception of reports that have the 'SaveData' tag in the description--see below), and any changes that you have made. These can include limits, sorting, and field additions or removal. If you wish to save only the data in the report, you may want to export a section instead. See the "Exporting Data" section for details.

ONE SIGNIFICANT ISSUE FOR USERS WHO SAVE RESULT SETS WITH REPORTS TO THE LOCAL MACHINE: A change in how Hyperion handles BQYs required developers to modify the save settings in some ReportMart1 reports to not retain data by default when reports are saved to the desktop. The reports that, by default, will not save result sets can be identified by the 'SaveData' tag found at the end of the description of the report in the portal. To save data with these reports, users will need to change the Save Options (found under the File menu) by selecting sections in the Save Query Results with Document section. If the user fails to change this setting ALL DATA WILL BE LOST WHEN SAVING THE REPORT TO THE LOCAL MACHINE. For instructions on how to change the setting please view the 2-minute [Saving Results with Your Report](#) demo. We expect this change to be temporary.

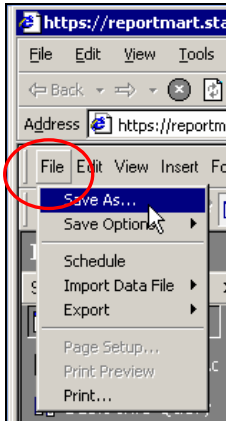
Note: Once a report is saved locally, it is not automatically updated if revisions are made by the report developer such as adding additional sections or functionality. Therefore, it is advisable to view the report that is listed in ReportMart1 regularly in order to take advantage of any new features.

To Save a Report Using a PC, Complete the Following Steps.

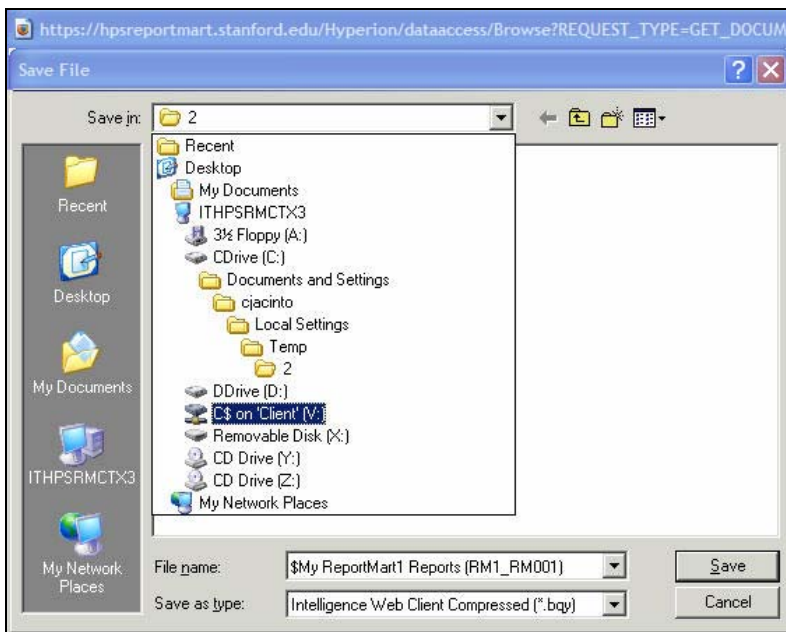
1. Process the report and apply any customizations that you plan to re-use in the future (e.g., limits, etc.)
2. From the File menu, select 'Save As' or click the Save button on the toolbar.
3. Navigate/Browse to where you would like the report to be saved.
4. Enter a name for the file (the filename will default to the report name, for example '\$My ReportMart1 Reports (RM1_RM001)').
5. Click Save.

To Save a Report Using a Mac, Complete the Following Steps.

1. Process the report and apply any customizations that you plan to re-use in the future (e.g., limits, etc).
2. From the inner menu bar (the one closest to the report), select **File > Save As...**

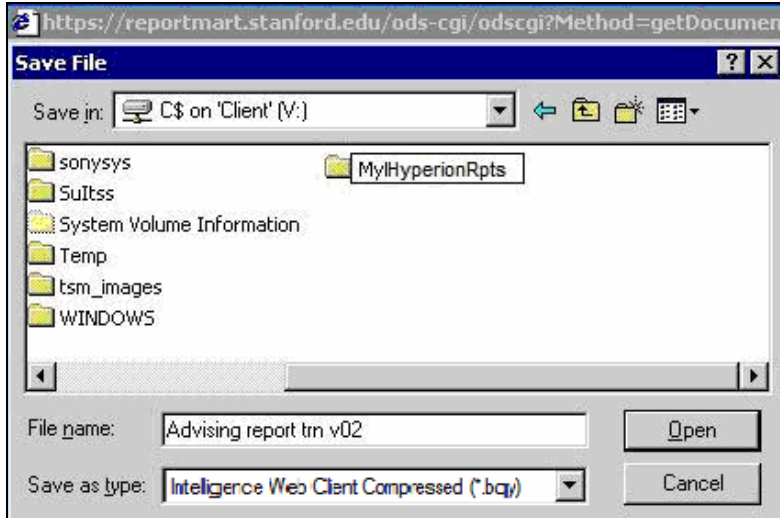


3. In the dialog box that appears, click the Save in drop-down and select **Desktop > ITHPSRMCTX#> C\$ on 'Client'(V):**, where '#' is a 1-digit number (1, 2, etc.); the drive letter may be 'V' or another value, depending on your computer's configuration.



Note: If you do not see an option that looks like **C\$ on 'Client'(V)**, please file a HelpSU ticket.

4. You can save your file directly on **C\$ on Client** (your hard drive), or put it in a folder: Rename the file, if desired (give it a name that is meaningful, one that you will remember), and then click **'Save.'**



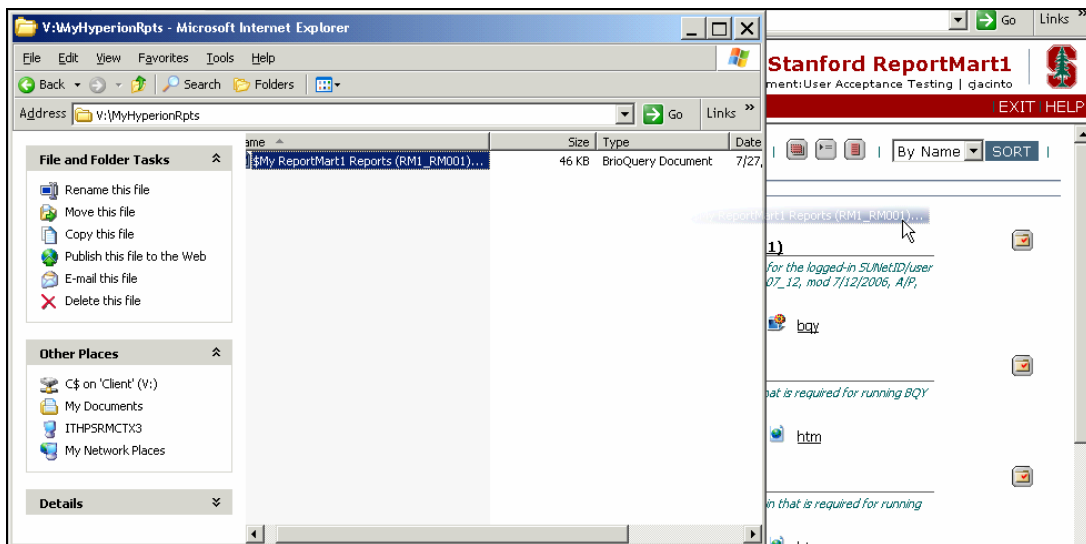
Re-processing and Using Saved Reports

You can re-process a report that you previously customized and saved.

To reprocess a saved report using a PC, complete the following steps.

1. Log in to the ReportMart1 portal.
2. Find the report on the local machine and drag the report into the ReportMart1 portal (i.e., open browser window).

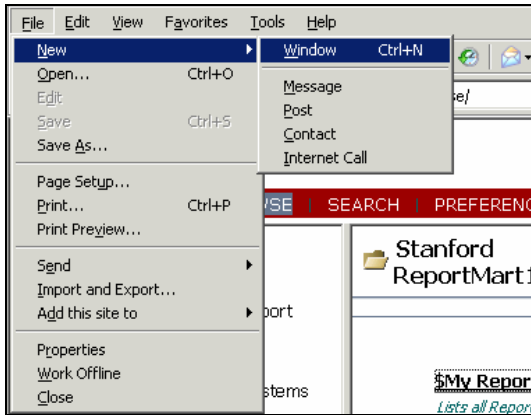
Note: In ReportMart1/Brio it was not necessary to log in to the portal before attempting to open and re-process a saved report. Additionally, it was possible to open and re-process a saved report by using the File > Open method or double-clicking on the report. Neither of these methods works in the new ReportMart1/Hyperion portal.



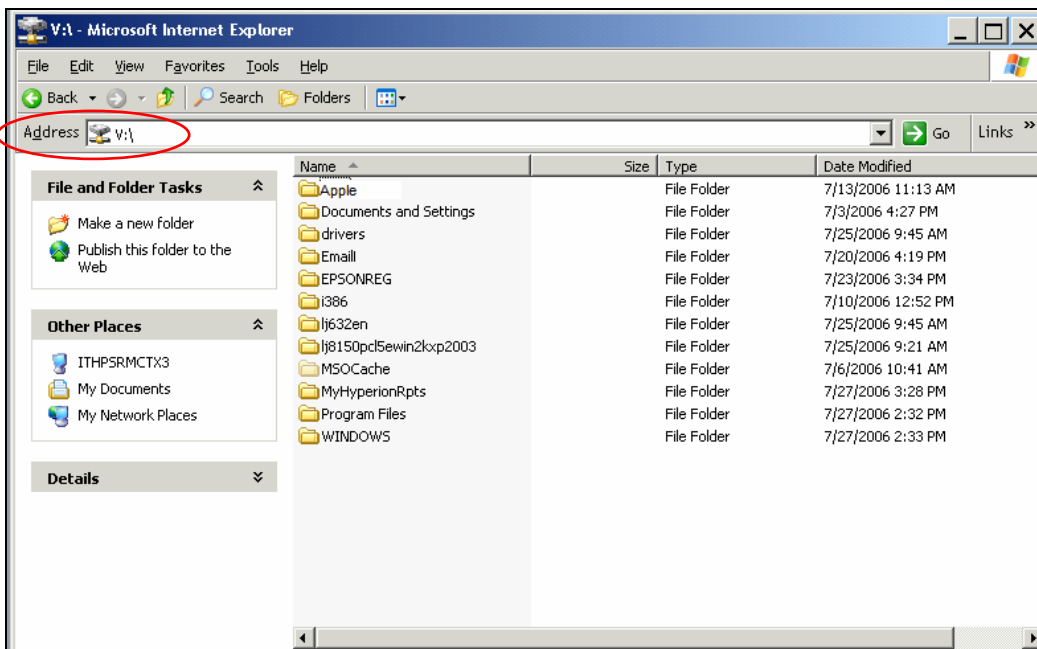
To reprocess a saved report using a Mac, complete the following steps.

Reprocessing a saved report using a Mac requires the use of multiple browser windows. You may need to reduce the size of the ReportMart1 window to approximately $\frac{3}{4}$ size. Reducing the size of the window makes the multiple windows easier to manage.

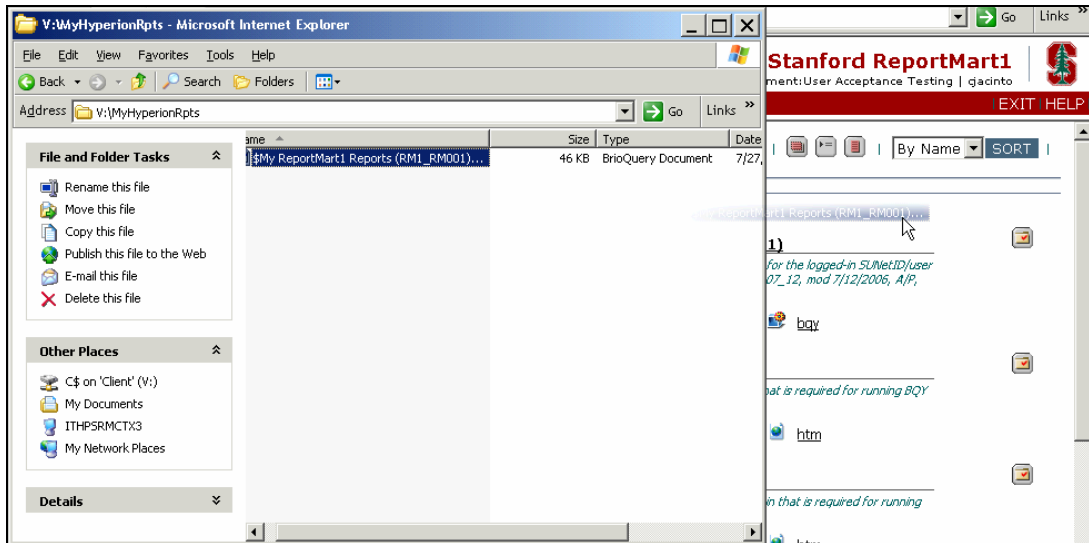
1. Log in to ReportMart1 portal (via Connect, as normal).
2. Open a new window by selecting File > New > Window.



3. Enter 'V:\' in the address bar of the new window. You should then see a directory of folders on your local computer.



4. Navigate/browse to the saved report, then drag it from the new window into the open ReportMart1 window.



5. Your report will automatically open.
6. To re-process the report, select the Introduction page and follow the instructions.

ADDITIONAL HELP

General Help

- [HelpSU](http://helpsu.stanford.edu/) - for help with ReportMart1, send help requests to <http://helpsu.stanford.edu/>. Choose "Application – ReportMart1" as the Problem Category. Please include the report name and number as well as the operating system of the computer you are using to access ReportMart1. If you have a question about accessing reports, data in reports, or how to customize reports, this is the best way to get help quickly. You can also phone the Help Desk at 5-HELP.

Training

- **ITS** provides an introduction to ReportMart1 and the Hyperion Insight query tool in the class "Introduction to ReportMart1 Using Hyperion" (ITSS-8401).

To register for courses, use STARS via the "Training" tab at <http://axess.stanford.edu/>. You will be required to enter your SUNet ID and password in order to register. The STARS online catalog also contains the most current and comprehensive listing of classes.

- **The ReportMart1 Team** also offers group sessions for more intermediate or advanced topics if time and resources permit. To inquire about arranging one of these sessions, please send a [HelpSU ticket](#) and choose "Application – ReportMart1" as the Problem Category. Please include information about the number of people and the type of information you would like covered in the session.

Useful URLs

- [ReportMart1](#) for PC Users
- [ReportMart1](#) for Mac Users
- [The ReportMart1 Upgrade](#) page - Frequently Asked Questions about ReportMart1
- [ReportMarts Description](#) page – discussion of ReportMart1 and ReportMart3
- [HR Administration](#) – provides information about HR reports, including job aids and report examples
- [Hyperion Software](#) – a link to the company that makes the Hyperion Insight query tool (for comprehensive documentation from Hyperion; log in to the [ReportMart1](#) site and click on the 'Help' link in the upper right-hand corner of the screen)