



Onboarding Module (OBM)

Reporting Guide

December 2023





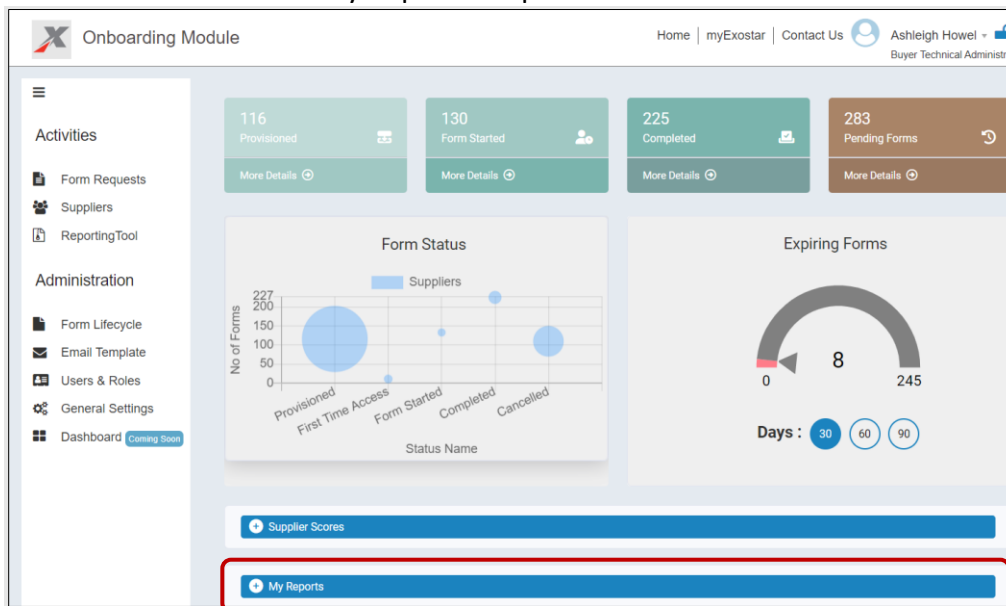
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[Onboarding Module \(OBM\) Reporting Overview](#)

OBM focuses on vetting and certification management of prospective and existing Suppliers. It contains built-in data collection processes and workflows, automated features, and services that allow users to continuously review and make future decisions on Supplier relationships.

The Reporting Tool is one of the main OBM features and provides Buyer Technical and Functional Administrators the ability to pull aggregate Supplier reports. OBM provides several pre-existing reports, as well as the capability for users to create custom reports. Users can save up to ten most viewed reports on the dashboard, in tabular or chart format. These reports display at the bottom of the dashboard via the My Reports drop-down.



There are two main types of available reports:

- **Standard Report:** These reports pull content based on built-in parameters and are not customizable.
- **User Report:** These reports are built by users and are customizable.

[Access Reporting Tool](#)

You must be designated as a Technical Administrator or Functional Administrator in the OBM application to access the Reporting Tool, which displays in the left-hand navigation. To access the reporting feature:

1. Navigate to the [MAG Login](#) screen. Input your **Email Address OR User ID**. Click **Next**.

Log In

Email or User ID

[Login Using Company Credential \(EAG\) ?](#)
[Login Using Badge or Certificate ?](#) **NEXT**

2. Input your **Password**. Click **Next** to display the MAG Dashboard.

ashleigh.howell@exostar.com

Enter Your Password

Password

This is your Exostar account password

[Use a different email/user ID](#)
[Forgot password?](#) **NEXT**

3. From the **My Applications** section, click the **Launch** button from the **Onboarding Module** tile.

My 2FA Credentials ? Credential Strength: Username and Password [Manage and Renew](#) [Get 2FA](#) [Have a license key? Enter it here](#)

Elevate your credential strength: Some of your applications are more secure than others. To access them more quickly, elevate your security with your preferred 2FA if you have 2FA.

Link your existing credentials: [Badge](#): Get access to applications using DoD CAC ([CAC Policy](#)), NASA PIV, NGC OneBadge, or Canada DND PKI Smart Card. [Link now](#) [Federated Identity Service \(FIS\)](#) [Inactive](#) [Request Access](#)

Applications

My Applications Open Applications Request Applications

Exostar Buyer Onboarding Module Status: Active Last Access: 06/24/2022 01:42 PM Launch	Test Service Provider Test Service Provider Status: Pending Pending Approval	Test Service Provider Demo Service Provider Status: Pending Pending Approval
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IMPORTANT: At this point in the process, the system prompts for your security credential. The Buyer Organization determines the credential type required to access the OBM application, so please reach out to them for more information.

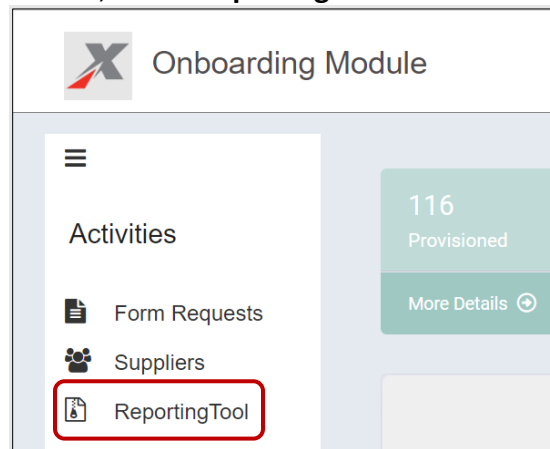
- Once you successfully login with your security credential, the system displays the **Export Control Acknowledgement**. Place a checkmark next to **I understand that this application is accessible by both U.S. and Non-U.S. Persons. I agree not to post Export Controlled Technical Information to this application**. Click **Accept** to display the OBM dashboard.

Export Control Acknowledgement

I understand that this application is accessible by both U.S. and Non-U.S. Persons. I agree not to post Export Controlled Technical information to this Application.

Decline

- From the OBM Dashboard, select **Reporting Tool** from the **Activities** menu.

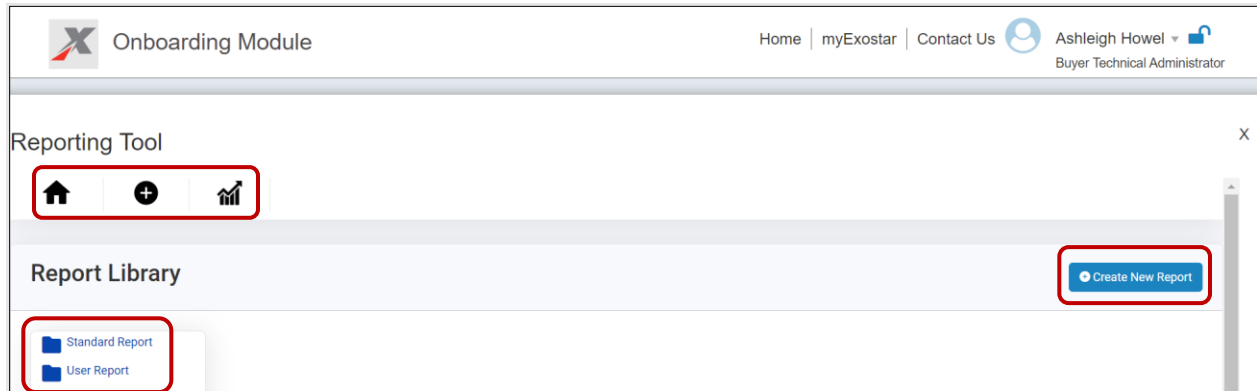


[Reporting Tool Dashboard](#)

The Reporting Tool dashboard displays a comprehensive list of reports in their respective formats (bar chart, graph), as well as additional navigational features:

- View All Reports** (Home button): This displays a library of all existing Standard Reports and custom-created User Reports. Select this option to return to the Reporting Tool Dashboard.
- Create New Report** x2 (+ buttons): Select either of these buttons to start a new report.
- View Dashboard Reports** (graph button): Select this option to view and manage existing dashboard reports.

Use the left-hand navigation to open existing reports based on type.



[Create New Report](#)

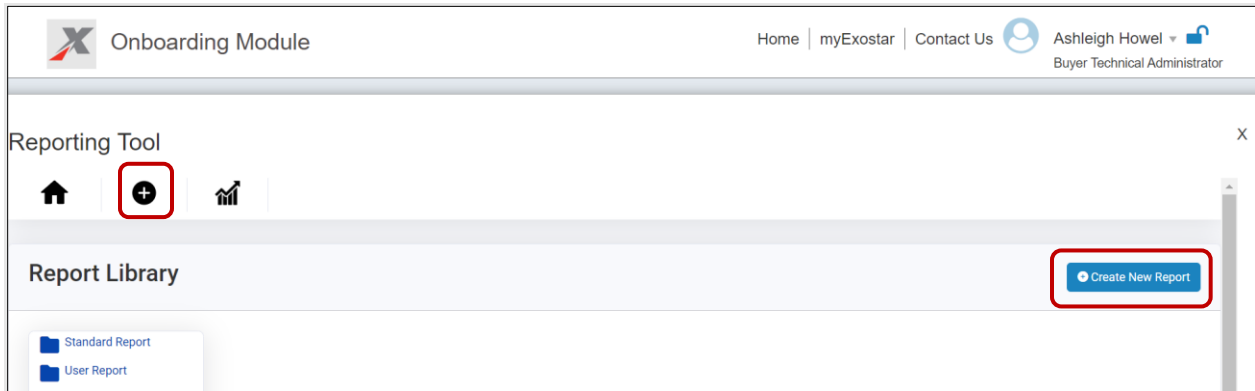
The Create New Report interface allows Technical and Functional Administrators to drag and drop attributes from the left-hand View section into the Column Header section. Users can further enhance the report utilizing the following features:

- **Filter:** This section allows you to filter the report using specific attributes.
- **Sorting:** This section allows you to sort desired attributes in ascending or descending order.
- **Group By:** This field is used with aggregate functions, such as COUNT, MAX, MIN, SUM to group the result set by one or more columns.

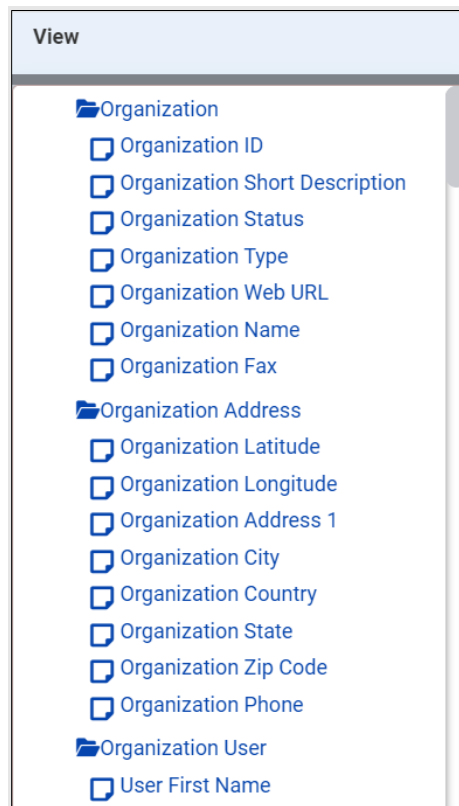


To create a new report:

1. Navigate to the **Reporting Tool**. Click the **+Create New Report** button.



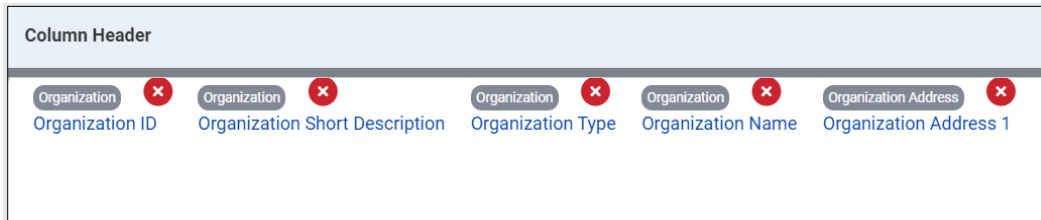
2. Locate desired attributes in the left-hand **View** column.



NOTE: Please see [Appendix A](#) for a comprehensive list of all available attributes and descriptions for each.

3. Drag and drop attributes into the **Column Header** section.

NOTE: Rearrange the order by selecting and moving the attributes. To remove, select the red X.



4. Drag and drop attributes into the **Filter section**. The **Filter** dialogue box displays for you to make further selections.

5. Select the desired option from the **Operator** drop-down menu:
 - a. **EQUAL**: This selection yields results equal to the value you input.
 - b. **GREATER**: This selection yields results greater than the value you input.
 - c. **GREATEREQUAL**: This selection yields results greater than or equal to the value you input.
 - d. **LESS**: This selection yields results less than the value you input.
 - e. **LESSEQUAL**: This selection yields results less than or equal to the value you input.
 - f. **NOTEQUAL**: This selection yields other values than specified.
 - g. **BETWEEN**: This selection yields results in between two different values.
 - h. **ISNULL**: This selection yields values that are empty.
 - i. **ISNOTNULL**: This selection yields values that are NOT empty.

6. Input the corresponding numeric **Value**, depending on the **Operator** you selected. Click **Add**.

Filter

Column: User State

Operator:* EQUAL

Value:* 30

Add Cancel

7. Repeat steps 4-6, as necessary, to complete the **Filter** section.

Filter

Organization User User State EQUAL 30

Organization User User Updated Date GREATEREQUAL 10

8. Drag and drop attributes in the **Sorting** section.

NOTE: Select the radio button for **ASC** (ascending) or **DSC** (descending) at any point.

Sorting ASC DESC

Supplier Info Organization Tax ID

Supplier Info Organization Is Blocked

Supplier Info Organization Global DUNS Number

9. Optionally, drag and drop attributes in the **Group By** section. The **Function** dialogue box displays each time you drop an attribute. Place checkmarks next to the desired **Column Headers**. From the center drop-down menu, select from the following:
- Count:**
 - Maximum:**
 - Minimum:**
 - Sum:**

10. Input an **Alias** in the field provided. Click **Update** to add the **Group By** attribute.

The screenshot shows a 'Function' configuration window. On the left, a list of attributes is shown with checkboxes: 'Organization ID' (checked), 'Organization Short Description' (unchecked), 'Organization Address 1' (checked), 'Organization Status' (unchecked), and 'Organization Name' (unchecked). A red box highlights the checked items. In the center, a dropdown menu for 'Organization ID' is open, showing options: 'Count', 'Maximum', 'Minimum', and 'Sum'. To the right, there are 'Alias' input fields for each attribute. At the bottom, there are 'Update' and 'Cancel' buttons, with 'Update' highlighted by a red box.

11. Once you drag and drop all desired attributes, select the **Save Report** button.

NOTE: Click the **Preview Report** button to view the report. Click the **Clear** button to remove selected attributes.

The screenshot shows a report configuration interface. It has two main sections: 'Filter' and 'Sorting'. At the bottom, there are three buttons: 'Preview Report' (with a list icon), 'Save Report' (with a save icon), and 'Clear' (with an 'x' icon). The 'Save Report' button is highlighted with a red box.

12. In the **Save Report** dialog box, input **Report Name** (required) and **Report Description** (optional). Click **Save**.

The 'Save Report' dialog box contains the following fields and buttons:

- Report Name:** * (required) with the value 'Ashleigh Test 1'
- Report Description:** (optional) with the value 'Training Test'
- Save** button (highlighted with a red box)
- Close** button

[Manage Existing Reports](#)

Select the User Report option from the left-hand navigation to view a list of existing reports. This Reports Dashboard provides a comprehensive list of all existing reports, as well as additional columns of details. Report management options display in the **Actions** column.

The 'User Report' dashboard displays a list of reports with the following columns: ID, Name, Description, Actions, and Created By. The 'Actions' column is highlighted with a red box.

ID	Name	Description	Actions	Created By
1116	Dashboard test			User
1114	Forms Last Completed	test		User
1112	suppliers			User
1111	Org List			User
1110	33			User

The following actions are available:

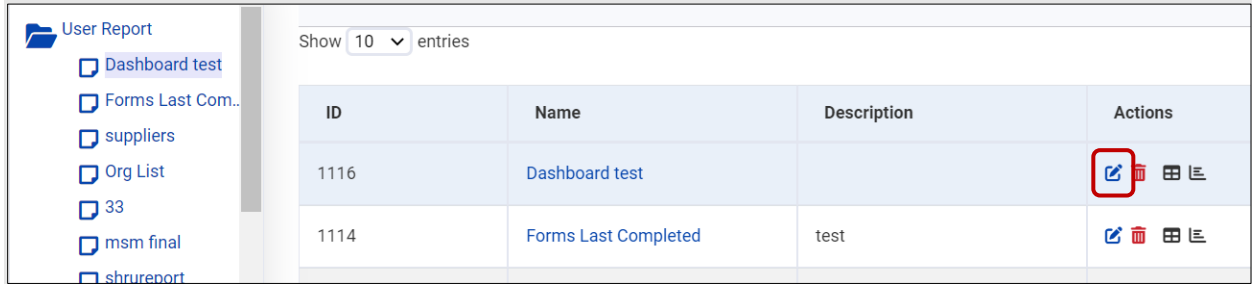
- **Edit:** The blue, edit icon allows you to make changes to an existing report.
- **Delete:** The red trashcan icon allows you to delete an existing report.
- **Create Dashboard Report:** The table icon allows you to create a dashboard report out of an existing report.
- **Create Dashboard Chart:** The chart icon allows you to create a dashboard chart out of an existing report.









IMPORTANT: OBM only allows for 10 dashboard reports. If this maximum is met, an error displays when you try to add another.

Edit Existing Report

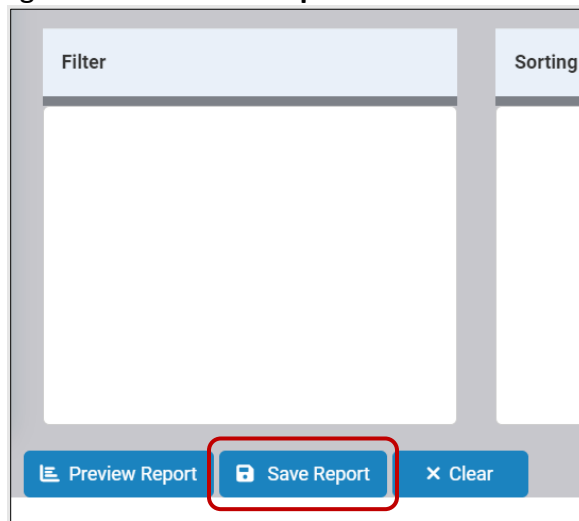
To edit an existing report:

1. Locate the desired report. Click the **Edit** icon.



ID	Name	Description	Actions
1116	Dashboard test		   
1114	Forms Last Completed	test	   

2. Make desired changes. Click the **Save Report** button.

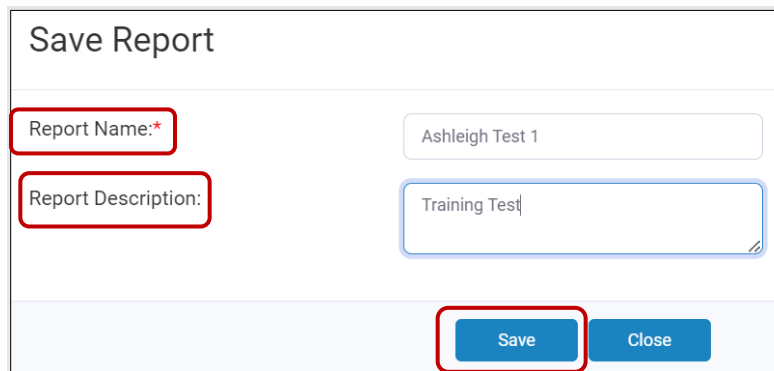


Filter

Sorting

Preview Report **Save Report** Clear

3. In the **Save Report** dialog box, input **Report Name** (required) and **Report Description** (optional). Click **Save**.



Save Report

Report Name:* Ashleigh Test 1



Report Description: Training Test

Save Close

Delete Existing Report

To delete an existing report:

1. Locate the desired report. Click the **Delete** icon.

ID	Name	Description	Actions
1116	Dashboard test		
1114	Forms Last Completed	test	

2. Click **OK** to confirm deletion.

Do you want to delete the selected Report?

CANCEL






Dashboard Reports

Once you successfully create a report, OBM provides the ability to add that report to the main dashboard. Please note, OBM limits the number of dashboard reports to ten. Reports allow only three columns. Charts only allow one horizontal column that can be a name, but the vertical axis must be a numbered value.

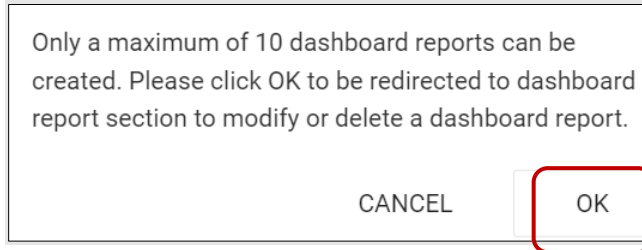
Create Dashboard Report

To create a dashboard report:

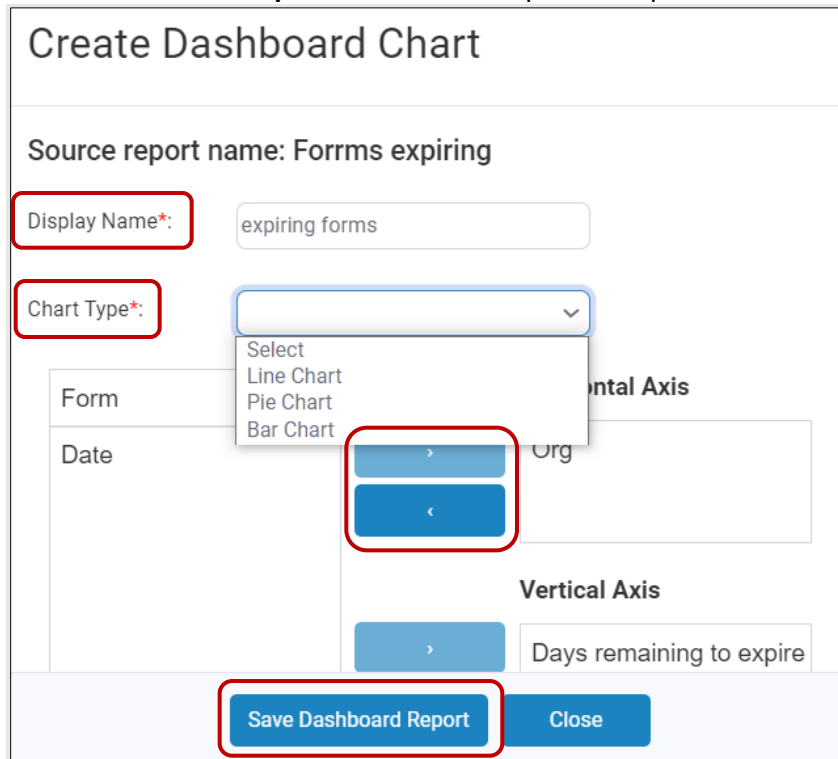
1. Locate the desired **User Report**. Click the **Create Dashboard Report** or **Create Dashboard Chart** icon.

ID	Name	Description	Actions	Created By	Created On
1116	Dashboard test			User	Feb 27, 2023
1114	Forms Last Completed	test		User	Feb 24, 2023
1112	suppliers			User	Feb 3, 2023
1111	Org List			User	Feb 3, 2023
1110	33			User	Feb 3, 2023

NOTE: If there are already ten reports displayed on the main dashboard, an error message displays. Click **OK** to navigate to the main dashboard to review existing reports and determine if you can remove any. Please see the [Remove Dashboard Report](#) section below for instructions.



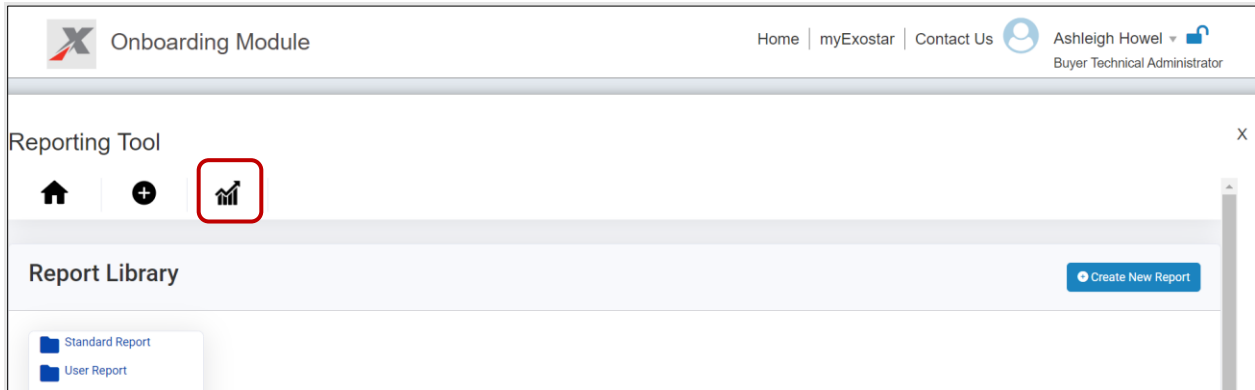
2. Input a **Display Name** in the field provided.
3. Select the desired **Chart Type: Line Chart, Pie Chart, or Bar Chart**.
4. Add desired columns by selecting the column name and using the left/right arrow buttons.
5. Click the **Save Dashboard Report** button to complete the process.



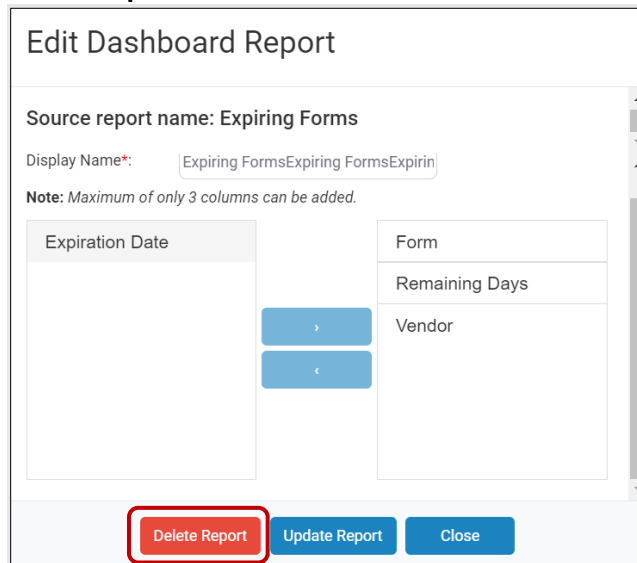
Remove Dashboard Report

To remove an existing dashboard report:

1. Navigate to the **Reporting Tool**. Select the **View Dashboard Reports** icon.



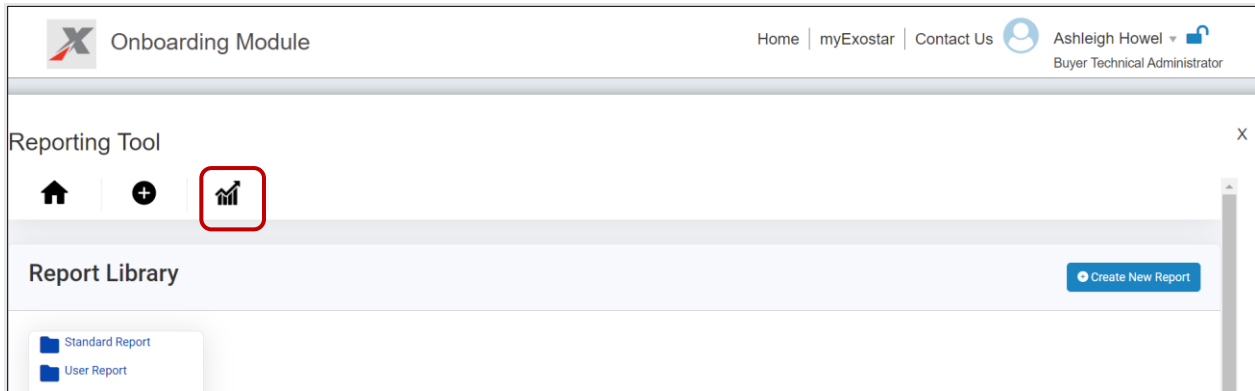
2. Select the desired report from the left-hand menu. In the **Edit Dashboard Report** dialogue box, select the **Delete Report** button.



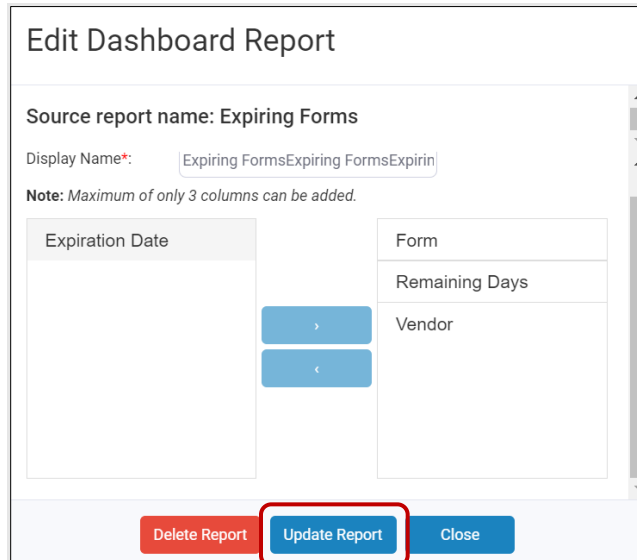
Update Dashboard Report

To update or manage an existing dashboard report:

1. Navigate to the **Reporting Tool**. Select the **View Dashboard Reports** icon.



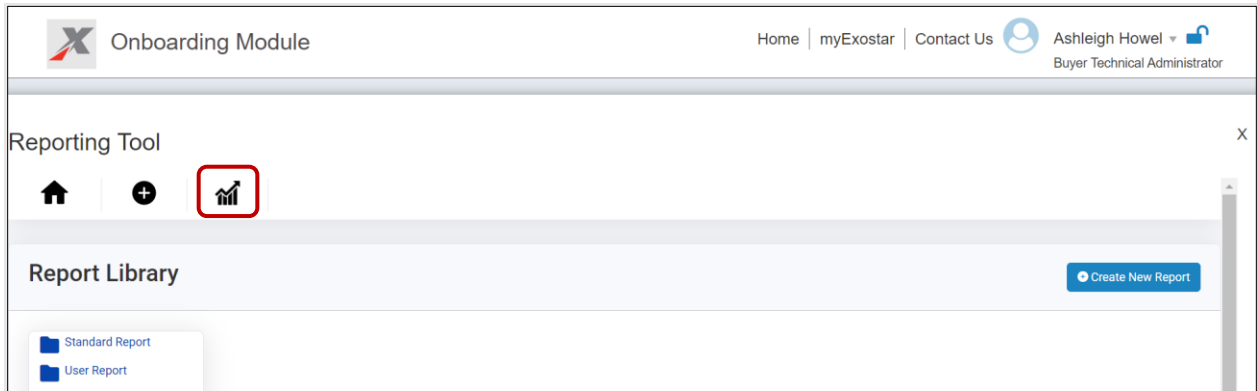
2. Select the desired report from the left-hand menu. In the **Edit Dashboard Report** dialogue box, made desired changes. Select the **Update Report** button.



Hide Dashboard Reports

OBM provides the option to hide an existing dashboard report from view. It is important to note, this only hides the report, it does not remove it from the limit of ten. To hide a report:

1. Navigate to the **Reporting Tool**. Select the **View Dashboard Reports** icon.



2. Locate the desired report and right click. Select the Hide from dashboard option.

