

MicroStrategy Librarian Training

Revised: April 4, 2017

















INTRODUCTION

Within the Shared Reports area of each MicroStrategy project, every academic unit or administrative department has a unique folder (the “root folder”). It is the Librarian’s task to manage this root folder and all subfolders for his/her unit. This includes completing the following tasks:

- Creating new subfolders, deleting subfolders
- Write to approved folders
- Copy reports from other MicroStrategy areas to a unit root folder
- Manage users
 - Grant access to unit root folder and subfolders
 - Remove access to unit root folder and subfolders
- Move reports from one subfolder to another subfolder
- Sharing MicroStrategy best practices with their unit
- Managing subscriptions – this topic is covered in a separate MicroStrategy [Quick Guide](#).

The Librarian will have FULL CONTROL access to his/her root folder and FULL CONTROL access on all reports and subfolders. What this means is the Librarian can see everything located at the root folder, all subfolders, and all objects within all subfolders. The Librarian will be able to modify/delete/add reports to the root folder and all subfolders, but will not be able to modify the root folder itself.

Root folder examples, Academic and Administrative projects:

Academic > Shared Reports > Academic Unit Reports		Administrative > Shared Reports > Department Reports	
 Budget Office Owner: Administrator Modified: 3/23/17 11:59:58 AM	 BUS Owner: Administrator Modified: 3/8/17 4:17:02 PM BU - School of Business	 Accounts Payable Owner: Administrator Modified: 3/27/17 10:46:43 AM	 Auxiliary Enterprises Owner: Administrator Modified: 2/22/17 8:54:01 AM
 CEHD Owner: Administrator Modified: 3/22/17 2:16:48 PM E1 - Education and Human Development	 Central Admissions Office Owner: Administrator Modified: 2/26/16 1:50:56 PM	 Budget Office Owner: Administrator Modified: 3/7/17 12:52:19 PM	 Capital Projects Owner: Administrator Modified: 12/16/15 3:07:03 PM
 CHHS Owner: Administrator Modified: 2/15/17 3:10:16 PM HI - Health and Human Services	 CHSS Owner: Administrator Modified: 1/6/17 10:18:47 AM LA - Humanities & Social Sciences	 CEHD Owner: Administrator Modified: 7/22/16 3:37:25 PM	 CHHS Owner: Administrator Modified: 2/23/17 8:46:41 AM
 COS Owner: Administrator Modified: 2/6/17 1:25:35 PM SC - College of Science	 CVPA Owner: Administrator Modified: 11/7/16 11:56:01 AM AR - Coll Visual & Performing Arts	 CHSS Owner: Administrator Modified: 2/7/17 11:13:59 AM	 COS Owner: Administrator Modified: 3/9/17 11:18:37 AM

LOGIN TO MICROSTRATEGY

- Login to MicroStrategy via reporting.gmu.edu or microstrategy.gmu.edu

User name

Password


☐ Standard (user name & password)


☒ LDAP Authentication

Login


[Guest User](#)

- Click on the Academic or Administrative Project


 Welcome Admintrainer. (If you are not Admintrainer, [click here.](#))



Academic
EDWP ADM_STAR
Server name INDICUM.GMU.EDU



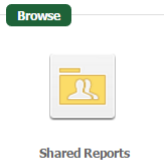
Administrative
Project description unavailable
Server name INDICUM.GMU.EDU




Report Consumer Tutorial
MicroStrategy Tutorial project that contains only tables, attributes, metrics, and reports relevant to Report Consumer training
Server name INDICUM.GMU.EDU

NAVIGATE TO YOUR FOLDER


- Click on Shared Reports



- Click on Academic Unit Reports (Academic project) or Department Reports (Administrative project)









Academic Unit Reports
Owner: Administrator
Modified: 2/22/17 10:32:19 AM
Formerly "Department Reports"



Department Reports
Owner: Administrator
Modified: 3/30/17 12:18:48 PM

- Click on your Academic Unit or Department folder. You will see many academic unit and department folders
 - Administrative Project/Department folder examples

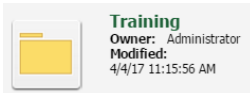
Administrative > Shared Reports > Department Reports

 <p>Accounts Payable Owner: Administrator Modified: 3/30/17 10:40:43 AM</p>	 <p>Auxiliary Enterprises Owner: Administrator Modified: 3/30/17 10:40:43 AM</p>
 <p>Budget Office Owner: Administrator Modified: 3/30/17 10:40:43 AM</p>	 <p>Capital Projects Owner: Administrator Modified: 3/30/17 10:40:43 AM</p>
 <p>CHSD Owner: Administrator Modified: 3/30/17 10:40:43 AM</p>	 <p>CHHS Owner: Administrator Modified: 3/30/17 10:40:43 AM</p>

- Academic Project/Academic Unit folder examples

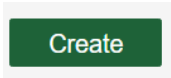


- Click on your Academic Unit or Department. For this example, we are using a dummy Training “department” folder

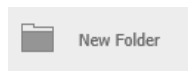


CREATE A TEST FOLDER FOR TRAINING PURPOSES

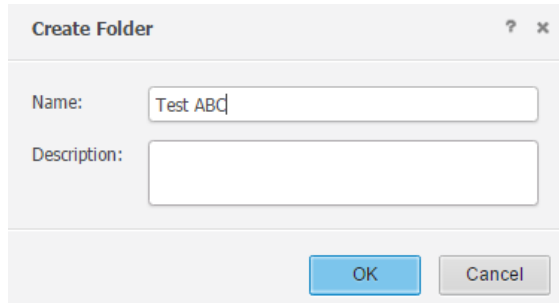
- Click on the green Create button



- Select New Folder



- Name the New Folder ‘Test ABC’ and click OK



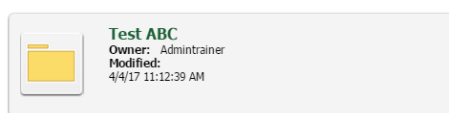
Create Folder

Name: Test ABC

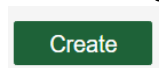
Description:

OK Cancel

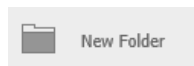
- Click on the ‘Test ABC’ folder



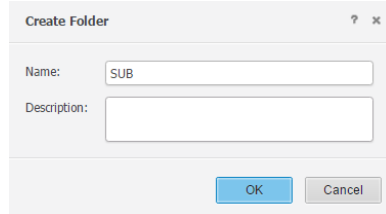
- Click on the green Create button



- Select New Folder



- Name the New Folder '**SUB**' and click OK



Create Folder

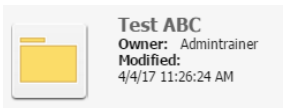
Name: SUB

Description:

OK Cancel

- Click on your root folder name. For this example, click on Training. You should see the Test ABC folder and you can click on it to see the SUB folder

> Training > Test ABC



COPY REPORTS AND ADD SHORTCUTS

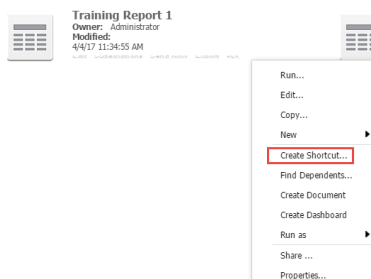
- Click on Home



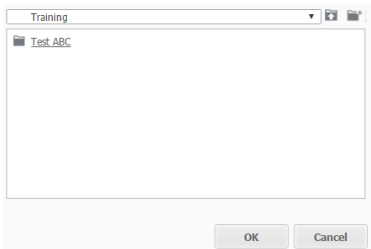
- Click on Shared Reports → Department Reports → Training

Administrative > Shared Reports > Department Reports > Training

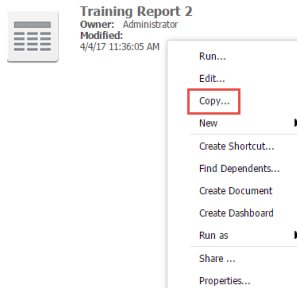
- Right-click on Training Report 1 and select Create Shortcut



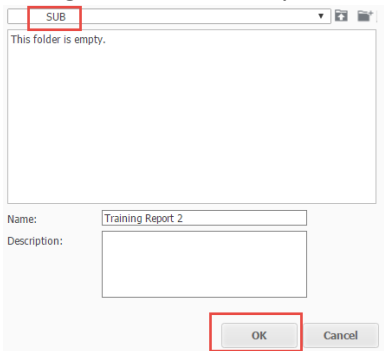
- Change the Target Location to your **Test ABC** folder and click OK



- Right-click on Training Report 2 and select Copy

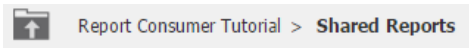


- Change the location to your SUB folder and click OK

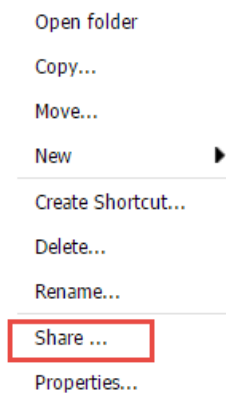


VIEW AND EDIT ACLS (ACCESS CONTROL LISTS)

- Click on Shared Reports

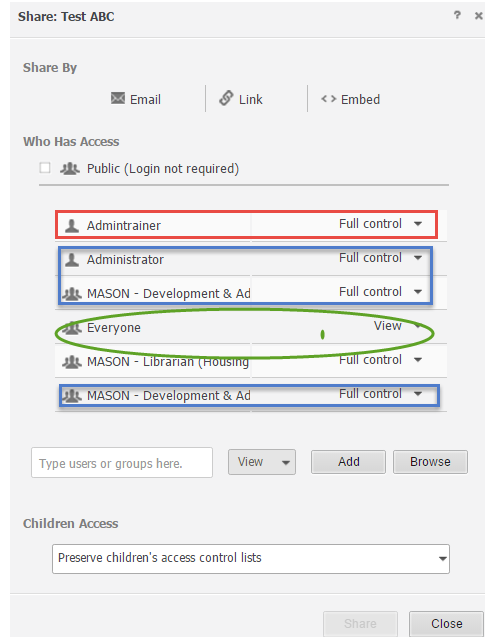


- Right click on the ABC folder and select Share.



- The Share feature allows you to see who owns this folder (you do, since you created it). It also allows you to see any other users, add and delete users, and change the users' ACL. ACL stands for Access Control List and basically means the privilege a person has on that folder, its subfolders, and all objects (reports, filters, prompts, etc.) that live in that folder.

- In the example below the account Admintrainer owns the folder and has Full Control (meaning that account can edit, write to, and delete items in this folder).
 - FULL CONTROL. Administrator and BI Group accounts (MASON – Development & Ad ...) will have FULL CONTROL
 - VIEW. Everyone will have View access. **DO NOT REMOVE** Everyone access



Share: Test ABC

Share By

Email | Link | < > Embed

Who Has Access

☐ Public (Login not required)

Admintrainer	Full control
Administrator	Full control
MASON - Development & Ad	Full control
Everyone	View
MASON - Librarian (Housing	Full control
MASON - Development & Ad	Full control

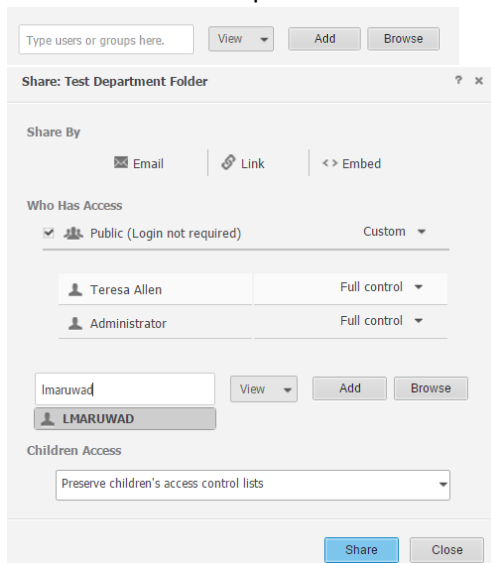
Type users or groups here. View Add Browse

Children Access

Preserve children's access control lists

Share Close

- Type a colleague's username into the 'Type users or groups here' box, someone in your Academic Unit or Department



Type users or groups here. View Add Browse

Share: Test Department Folder

Share By

Email | Link | < > Embed

Who Has Access

☒ Public (Login not required) Custom

Teresa Allen	Full control
Administrator	Full control

Imaruwad View Add Browse

LMARUWAD

Children Access

Preserve children's access control lists

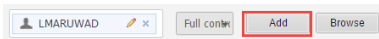
Share Close

- Click the arrow drop-down next to View. Now you will see all of the privileges options:
 - View – allows users to simply view the contents of a folder

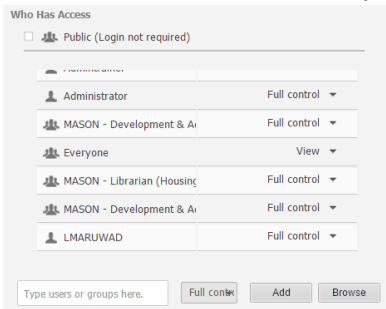
- Modify – allows users to edit the contents
- Full Control – allows users to edit, but also delete and add to, the folder
- Denied all – blocks a user from the folder
- Custom
- Select Full Control for the user you just added



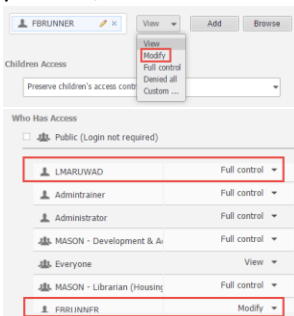
- Then click Add



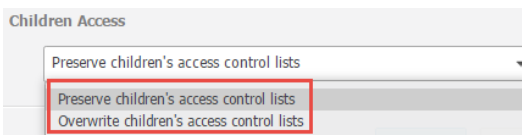
- You should now see that newly added user in the list



- Type another colleague's userid into the 'Type Users or Groups here' box and repeat the process, but choose MODIFY this time. Your screen should look something like below:

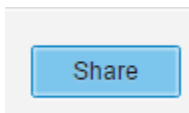


- Notice the 'Children Access' box. There are two possible options – please read carefully:

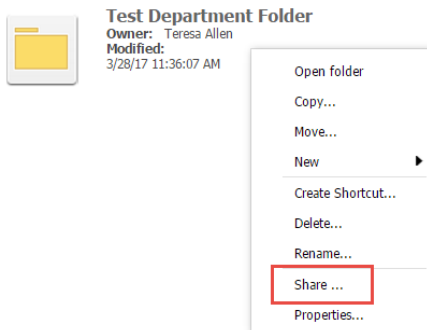


- **Preserve children's access control lists.** By selecting this option, the newly added users (in this case LMARUWAD and FBRUNNER) will not have access to any of the current subfolders, reports, and objects that live in this folder, Test ABC. However, they will have access to any new subfolders, reports, and objects because children objects (subfolders, reports, objects) inherit the ACLs from the parent.

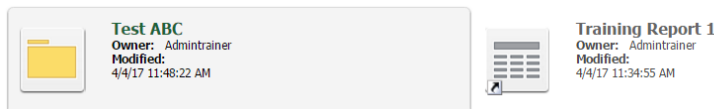
- **Use this option when you want to preserve the existing ACLs on subfolders, reports and objects and add new users to new objects**
 - **Overwrite children's access control lists.** By selecting this option, the newly added users will have access to everything within Test ABC – the SUB folder and all reports.
HOWEVER, this will overwrite any previous ACL settings.
 - For example, say you had two subfolders 'Sam' and 'Jill' and only Sam or Jill had FULL CONTROL ACL on those subfolders.
 - If you choose OVERWRITE Sam and Jill will no longer have access unless you add them to the Test ABC ACL
 - **Use this option when everyone at the root folder (Test ABC) needs to have the exact same personal level of access to every subfolder, report, and object within that folder**
 - Since our TEST ABC and SUB folders are new, select OVERWRITE
- Click Share



- Right click on your Test My Department Folder again and select Share.

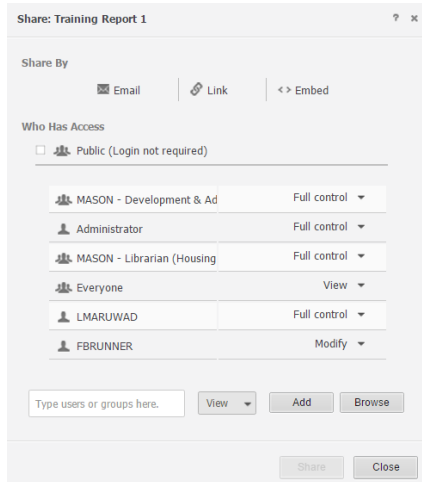


- View your Sharing to review your work. Click Close when you are finished
- Click on your **Test ABC** folder. You should now see your subfolder and the shortcut you created



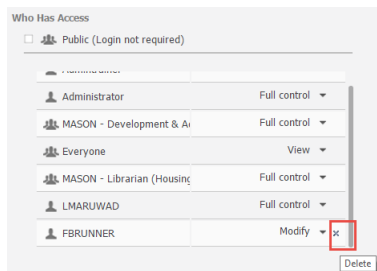
- Right-click on the **Training Report 1** shortcut and click Share. Notice how the users you added to the root **Test ABC** have access to the shortcut (because you selected Overwrite Children's

Access)

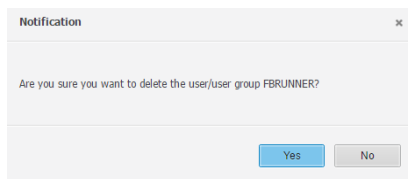


REMOVING USERS AND CHANGING USERS ACLS

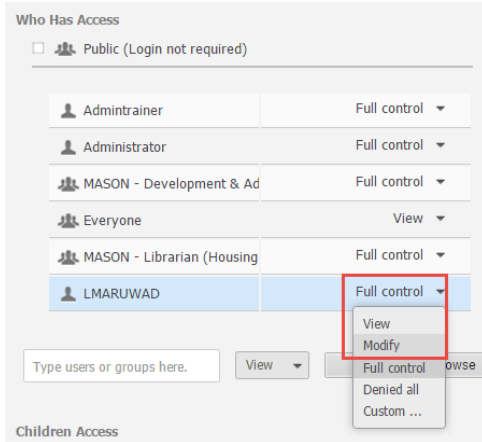
- Click on **Test ABC**
- Right-click and select Share. Hover over the user you just added and click the small 'x' to delete the user from this folder



- In the Notification window, click OK. You are not DELETING this user, but actually removing his or her access to this folder and its contents



- Click on the last user on the list and change their ACL from Full Control to MODIFY



Who Has Access

☐ Public (Login not required)

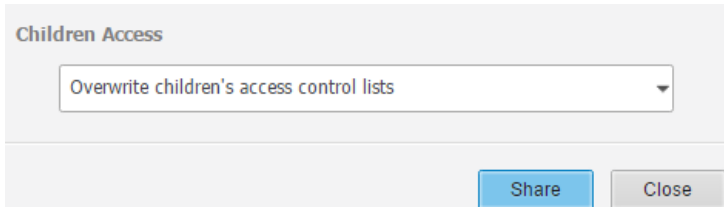
Admintrainer	Full control
Administrator	Full control
MASON - Development & Ad	Full control
Everyone	View
MASON - Librarian (Housing	Full control
LMARUWAD	Full control

Type users or groups here. View Add Browse

Children Access

Full control dropdown menu options: View, Modify, Full control, Denied all, Custom ...

- Change the Children Access to Overwrite and click Share

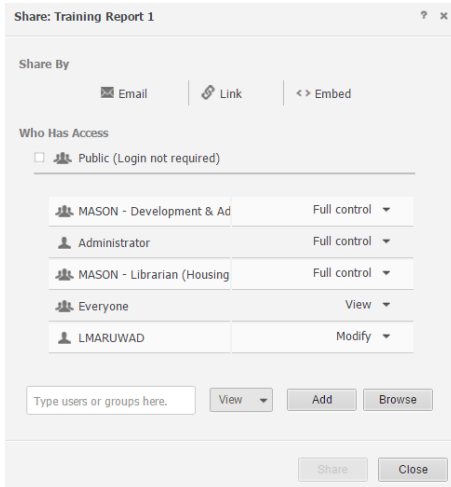


Children Access

Overwrite children's access control lists

Share Close

- Click on **Test ABC**. Click on **SUB**. Right-click on Training Report 2 and click Share. See how the users and privileges have changed on all subfolders, reports and objects:



Share: Training Report 1

Share By: Email, Link, Embed

Who Has Access

☐ Public (Login not required)

MASON - Development & Ad	Full control
Administrator	Full control
MASON - Librarian (Housing	Full control
Everyone	View
LMARUWAD	Modify

Type users or groups here. View Add Browse

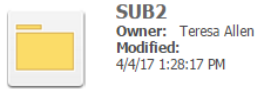
Share Close

MOVING OBJECTS ACROSS SUBFOLDERS AND FOLDERS

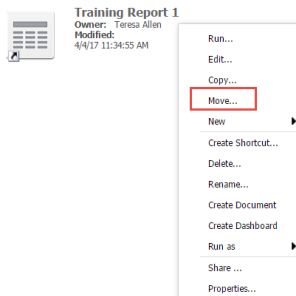
Academic > My Reports > Test My Department Folder > **Test My Department Subfolder**

- Click on **Test ABC** Folder

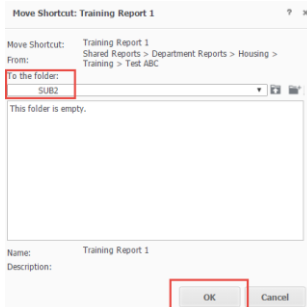
- Click on Create and select New Folder. Call this new folder **SUB2** and click OK.



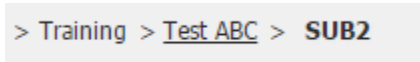
- Click on **Test ABC** Subfolder and right-click on the Training Report 1 shortcut. Select Move. (This operation applies to folders, reports, shortcuts, most any MicroStrategy object)



- Change the location to the **SUB2** folder and click OK

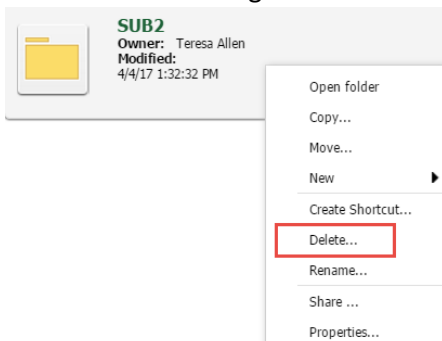


- Click on **Test ABC** and then on the **SUB2** folder to see the Shortcut you moved



DELETING OBJECTS

- Click on **Test ABC**. Right-click on the **SUB2** folder. Click Delete

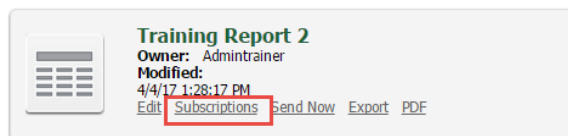


MANAGING SUBSCRIPTIONS

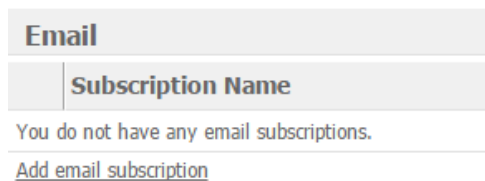
- You can have a report or document automatically delivered in an email. You can schedule deliveries to take place on a regular schedule or when a specific event occurs. To do this, you must create a subscription to the report or document. Subscriptions allow you to view reports or documents when you need them.
- As a Librarian, you can create subscriptions on your colleagues' behalf, **as long as they have access to the report and objects** (e.g. that you have granted them the correct ACL to be able to View and receive subscriptions) and **as long as you, the Librarian, are a Power User**.
- Use subscriptions sparingly and consider the timing:
 - We have many subscriptions at the 8 o'clock hour. Consider subscriptions after 9 o'clock
 - Consider scheduling subscriptions for the minimum number of deliveries necessary - once weekly or monthly, instead of daily. Subscriptions are the same as running reports, and if a ton of subscriptions are running at the same time, it will cause processing speed delays on microstrategy.gmu.edu
- More information on Subscriptions is available in the full [Quick Guide](#), available on repotring.gmu.edu, select Training, select Quick Guides.

SUBSCRIBE TO A REPORT

- Click on **Test ABC** Subfolder. Click on the **SUB** folder.
- Hover over Training Report 2 and select Subscriptions



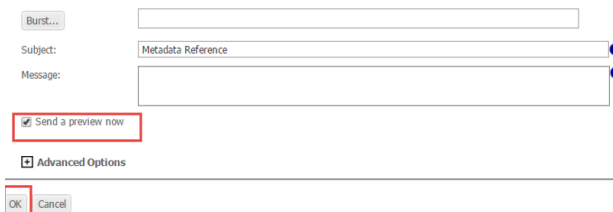
- On the My Subscriptions page, in the Email section, click Add email subscription.





- On the E-mail Subscription dialog box, in the Name field, make sure your username is shown. From the Schedule drop-down list, select Saturday 10:00 AM. Select 'Send a Preview Now.'
- You see your own information in the To drop-down list by default. Subscribe other users by performing the following steps:
 - a. Click the To button.
 - b. In the Recipients Browser Dialog Box, select one or more contacts.

- c. Click OK to save your changes and return to the E-mail Subscription dialog box.
- Recipients Browser Dialog Box
- On the E-mail Subscription dialog box, from the Send drop-down list, specify how the report or document is included in the email:
 - To include the report or document in the email, select Data in email.
 - To include the report or document in the email, and deliver it to the History List, select Data in email and to history list.
 - To include the report or document in the email, along with a link to the History List location of the report or document, select Data and link to history list in email.
 - To include a link only to the History List location of the report or document in the email, select Link to history list in email.

- Click OK.



- You will see a confirmation of your subscription. Click OK
- Scroll down to see the Subscription you created.

E-mail Subscriptions								
Subscription Name	Report/Document	Owner	Schedule	Recipient	Address	Personalized	Action	Unsubscribe
Training Report 2 4/4/17 1:35:57 PM	Training Report 2	Teresa Allen	10:00 AM - Daily	Teresa Allen	tallen4@gmu.edu	<input checked="" type="checkbox"/>	 	<input type="checkbox"/>

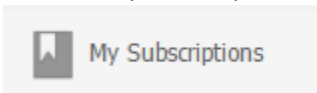
- If you like, log in to mail.gmu.edu to see the Test subscription delivered to your email

Business Intelligence Group
 Training Report 2 1:38 PM
 Training Report 2

- To verify you are subscribed click on Home

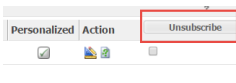


- Click on My Subscriptions



DELETE A SUBSCRIPTION

- Still in My Subscriptions, check the box next to the subscription you created and click Unsubscribe



DELETING OUR TRAINING WORK

- Click on your Academic Unit or Department folder
- Right-click on **TEST ABC** Folder
- Click Delete