

MicroStrategy Navigation Guide

NAVIGATION GUIDE SUMMARY

This guide details:

- what a Report Consumer and a Power User are
- what MicroStrategy projects are
- how to check MicroStrategy project and data mart refresh statuses
- how to open on a project
- how to switch from one project to another
- what are Shared Reports and Department Reports
- how to expand the folder location information

MICROSTRATEGY USER CATEGORIES

We have two types of MicroStrategy Users as Mason, Report Consumers and Power Users. You will often see these terms in our Quick Guides and training documentation. Report Consumers use MicroStrategy to run existing reports. Power Users run existing reports, but also participate in our User Acceptance Testing process, as well as create and manipulate reports. Report Consumers can self-train via resources on reporting.gmu.edu and can attend Report Consumer training. Power Users often will want to attend more in-depth, multi-day training.

PROJECTS

When you first log on to MicroStrategy you will see folder icons which represent MicroStrategy Projects. Each Project has a common business purpose and contains reports, documents, dashboards, metrics and attributes. Simply click on the project icon to enter that project and begin working with MicroStrategy.



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



Enrollment Summary

Project description unavailable

Server name INDICUM.GMU.EDU



GMU Public Reports

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



SPDM

Project description unavailable

Server name INDICUM.GMU.EDU

WHAT ARE PROJECTS?

A project is a collection of reports, documents, dashboards, and associated report items (like attributes, metrics, etc.). Projects have themes and logical groupings – for example, all Finance and HR reports are located in the Administrative project.

Current Projects

Projects currently deployed to MicroStrategy Web are:

Academic

Contains Admissions and Student data mart reports

Academic_UAT

Contains Admissions and Student reports in the User Acceptance Testing phase with stakeholders

Administrative

Contains Finance, HR, and PPDM reports

Administrative_UAT

Contains Finance, HR, and PPDM reports in the User Acceptance Testing phase with stakeholders

Enrollment Summary

Contains enrollment management data as defined by the Provost's office

GMU Public Reports

Contains enrollment and course management data available to the public user. These data and reports are also available to the public via this link: <http://provost.gmu.edu/enrollment-planning/>

MicroStrategy Tutorial

Out-of-the box MicroStrategy Tutorial data base (non-Mason data) which is useful for learning and training purposes

RPRT

Highly specialized freeform SQL reports only available to selected users with definitive business needs

SPDM

Contains sponsored programs data and reports

FUTURE PROJECTS AND PROJECT/DATA MART STATUS

MicroStrategy is deployed iteratively. Please check the data mart refresh status and MicroStrategy project status on the main page of reporting.gmu.edu for more information about future iterations for these projects as well as information about new projects added to MicroStrategy. For a more detailed look into which reports have been developed and are in the pipeline to develop, please log on to the MicroStrategy project management website on EPMO. Email bigroup@gmu.edu for access and eligibility questions.

MicroStrategy Project Status as of December 5, 2016:

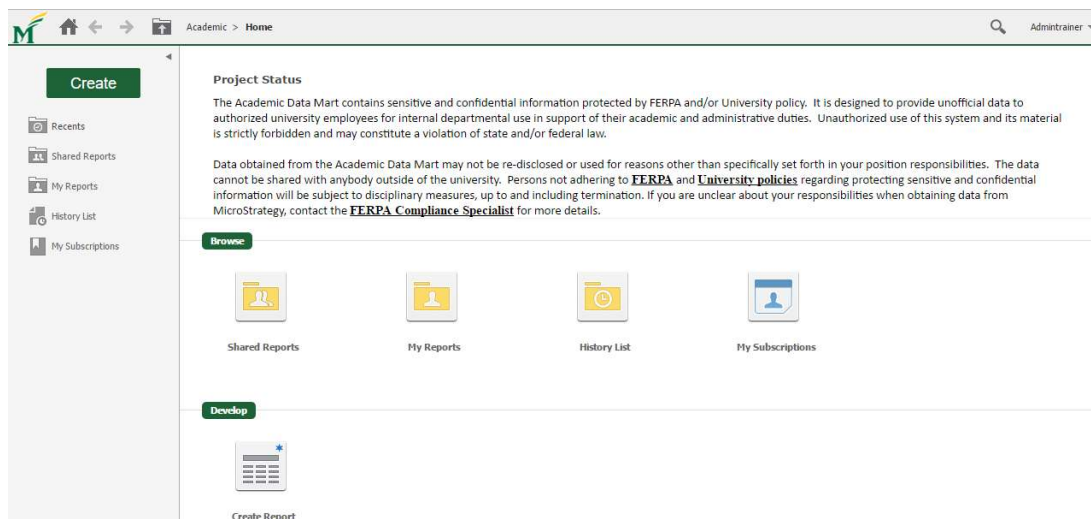
Datamart	Discoverer Sundown Date	Migration Status
Procurement	May 31, 2015	100% migrated to MicroStrategy
Admissions	July 31, 2015	100% migrated to MicroStrategy
Finance	December 21, 2016	75% migrated to MicroStrategy
HR	December 21, 2016	75% migrated to MicroStrategy
Student	February 29, 2016	100% migrated to MicroStrategy
Sponsored Programs	March 31, 2016	100% migrated to MicroStrategy
RPRT	December 18, 2016	100% migrated to MicroStrategy
GMU2	TBD	TBD

DATA MART REFRESH STATUSES

Data Mart	Refresh Completed	Data as of
ADMISSIONS	11/14/2016 1:19 AM	11/14/2016 12:55 AM
FINANCE	11/14/2016 1:34 AM	11/14/2016 1:00 AM
HR	11/14/2016 1:09 AM	11/13/2016 11:30 PM
HR - STAR	11/14/2016 3:32 AM	11/14/2016 3:00 AM
HR STAR FULL REFRESH	11/12/2016 9:48 AM	11/12/2016 9:00 AM
PROCUREMENT PIPELINE	11/14/2016 3:21 AM	11/14/2016 2:45 AM
SPONSORED PROGRAM	11/14/2016 5:14 AM	11/14/2016 5:00 AM
STUDENT	11/14/2016 1:41 AM	11/14/2016 12:55 AM

GETTING STARTED

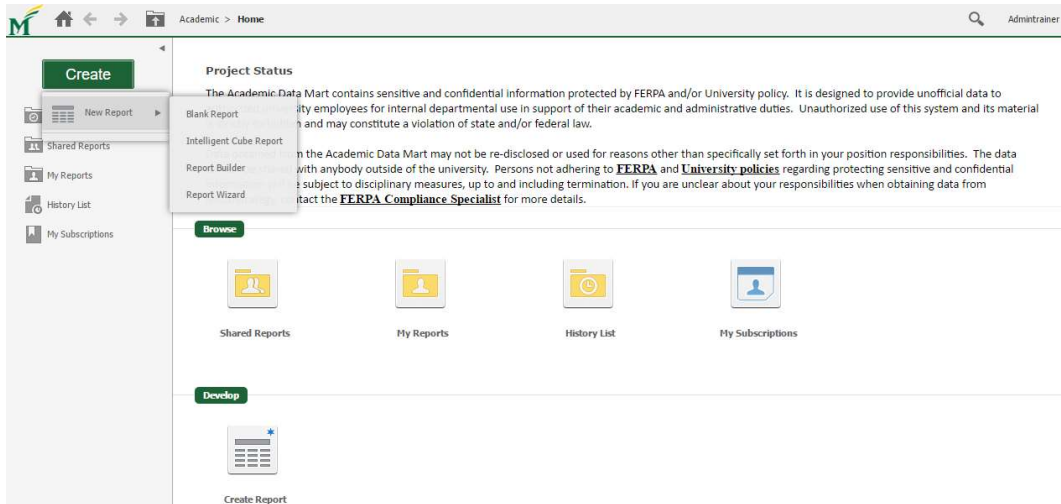
As soon as you click on a project icon you will see a menu of possible actions.



Click on any of these icons to complete that action (such as browsing/viewing Shared Reports, My Reports or History List, or creating a New Report).

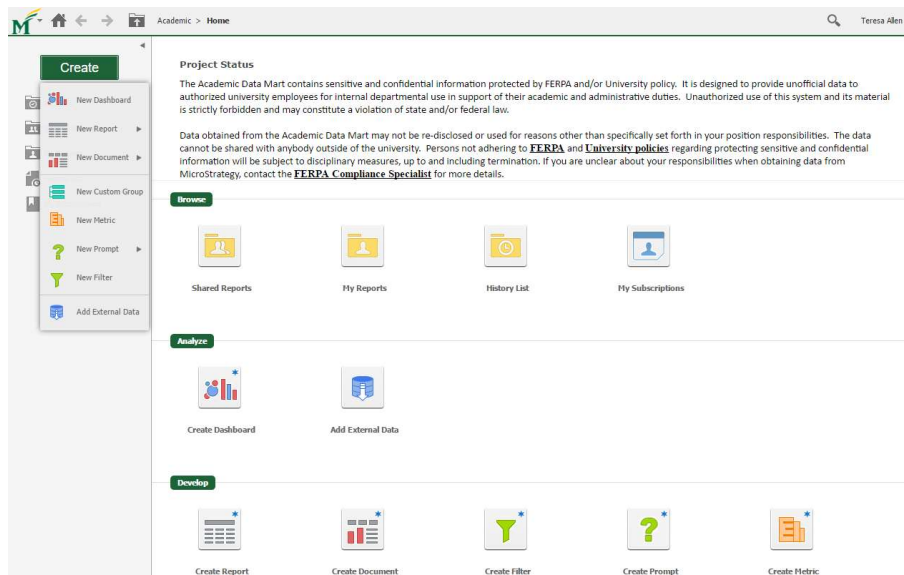
Report Consumers

Report Consumers typically will see the following possible actions:



Power Users

Power Users will typically see the following actions:

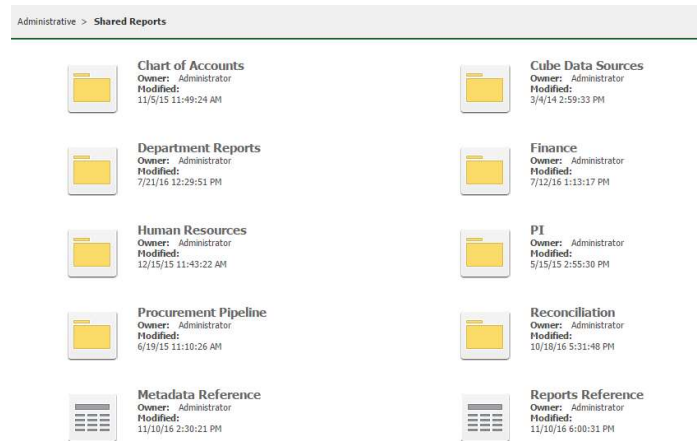


SHARED REPORTS

Click on Shared Reports. Depending on the project you will now see one to many icons. Click on any of these subfolder icons to view the reports within them.

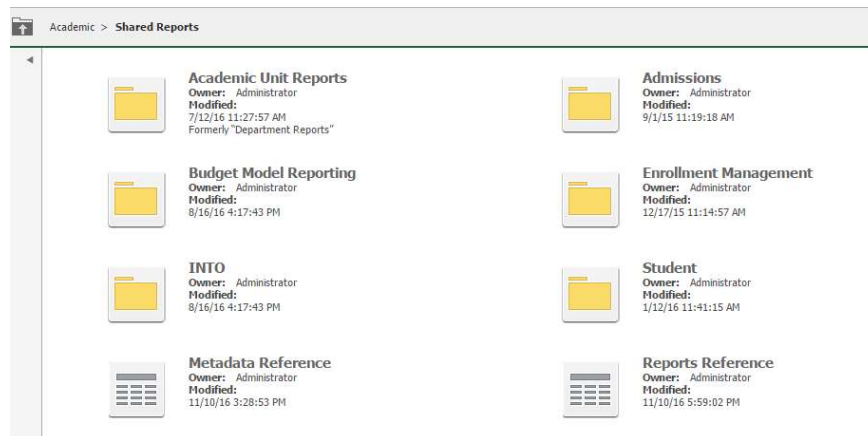
Administrative Project

Currently, the Administrative Project contains these subfolders of reports. Click on any folder to see and run the reports within:



Academic Project

Currently the Academic Project contains the following subfolders of reports:



Enrollment Summary








Currently the Enrollment Summary project contains the following subfolders of reports:



RPRT

Currently the RPRT project contains the following subfolders of reports:









RPRT > Shared Reports

 Budget Model Reporting Owner: Administrator Modified: 6/16/16 12:41:35 PM	 Development Owner: Administrator Modified: 6/20/16 10:55:21 AM
 Registrar Owner: Administrator Modified: 6/20/16 10:57:21 AM	 Sponsored Programs Owner: Administrator Modified: 6/20/16 9:11:12 AM
 Student Fiscal Reports Owner: Administrator Modified: 6/20/16 9:14:34 AM	 Student Fiscal Services Internal Owner: Administrator Modified: 6/20/16 10:48:34 AM
 Student Reports Owner: Administrator Modified: 3/11/16 6:00:29 PM	

SPDM

Currently the SPDM project contains the following subfolders of reports:

SPDM > Shared Reports Teres

 Audit Reports Owner: KHAZE Modified: 9/15/16 2:34:58 PM	 Department Reports Owner: Administrator Modified: 3/11/16 12:51:00 PM
 OSP_PI Emails Owner: Administrator Modified: 3/8/16 1:45:41 PM	 OSP Pending Owner: Administrator Modified: 5/6/16 1:28:25 PM * Discoverer Report: Pending worksheet*
 OSP_Proposals Owner: Administrator Modified: 9/23/16 6:57:13 AM *Discoverer Report: OSP_Proposals*	 OSP_Proposals by Date Range Owner: Administrator Modified: 9/15/16 1:23:53 PM
 OSP_Proposals Keywords Owner: Administrator Modified: 10/5/16 10:37:23 AM	 OSP_Proposals People Owner: Administrator Modified: 9/15/16 2:38:07 PM * Discoverer Reports: SPDM_ProposalPeople; SPDM_Proposals by Lead Unit *

MICROSTRATEGY SHARED REPORT ORGANIZATION

Business Intelligence Group Maintained Reports

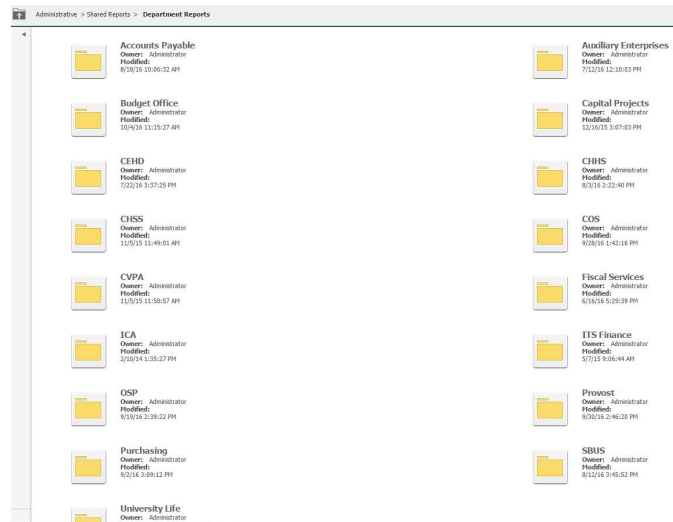
The Business Intelligence Group creates, updates, and maintains MicroStrategy reports through a working group process with key stakeholders around the university. Reports we will continue to manage are contained in the subject area folders (such as in the Administrative Project: Chart of Accounts, Human Resources, Admissions, Finance and in the Academic Project: Admissions, Student, etc.).

Department or Academic Unit Reports

There are also reports and links each Mason department or academic unit creates, manages, and maintains. Within the Department (called Academic Unit in the Academic project) Reports folder all Mason departments using MicroStrategy will have a folder for their group to maintain. Each department should assign one employee

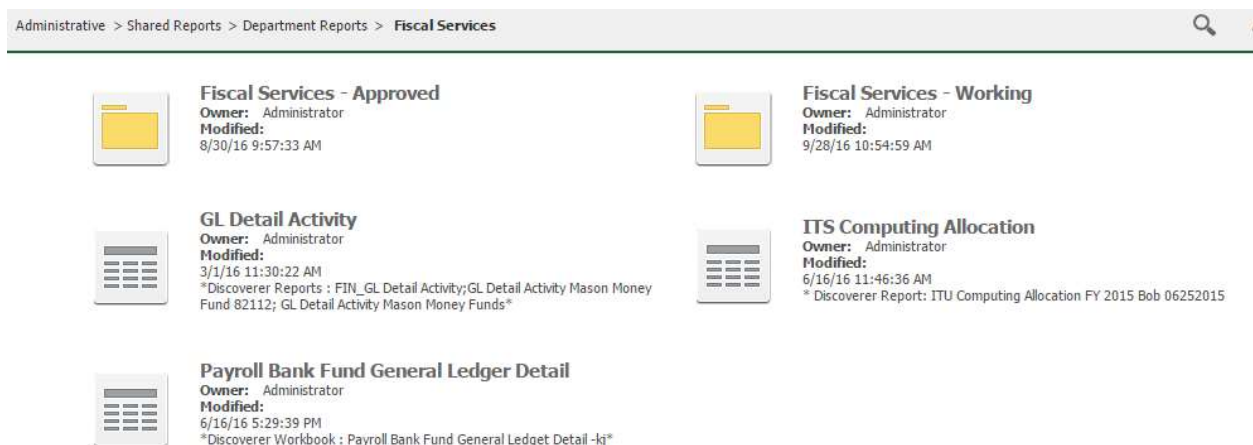
to be the MicroStrategy Report Librarian. It is the Librarian's role to manage the links and reports within the Department's folder, thus creating an easy-to-access collection of top reports used by your immediate colleagues. This collection can be links to other already created MicroStrategy reports or could be new reports just used by your department.

For example, currently the Department Reports folder in the Administrative Project contains:



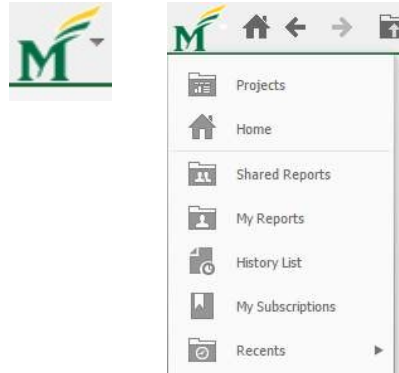
Each department folder will contain two folders at a minimum: Department – Working and Department – Approved. The Working folder is intended to be the reports your department is creating and testing for your own purposes. The Approved folder is intended to be the report links to other already created MicroStrategy reports (maintained by ITU Data Mart Support Group, Reporting Services).

As an example, the current structure of the Fiscal Services Department folder is as follows:



SWITCHING TO A DIFFERENT PROJECT

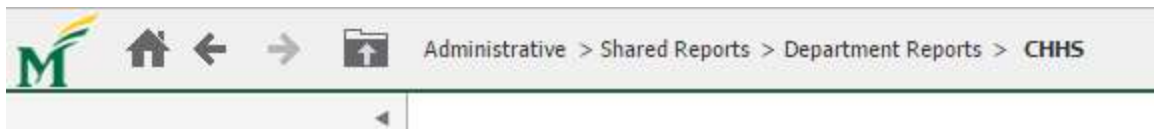
If you are in the Administrative Project, have access to the Academic Project, and wish to switch to Academic (or vice versa), click the arrow next to the Mason logo in the upper left hand corner of the screen. This will open a menu of options. Click on Projects to return to the Project homepage to select and switch to a different project.



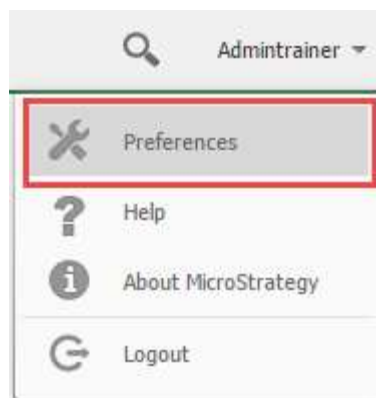
FOLDER LOCATION EXPANSION

If at any point you have forgotten where you are in MicroStrategy, you can expand the folder location to see the folder structure and path.

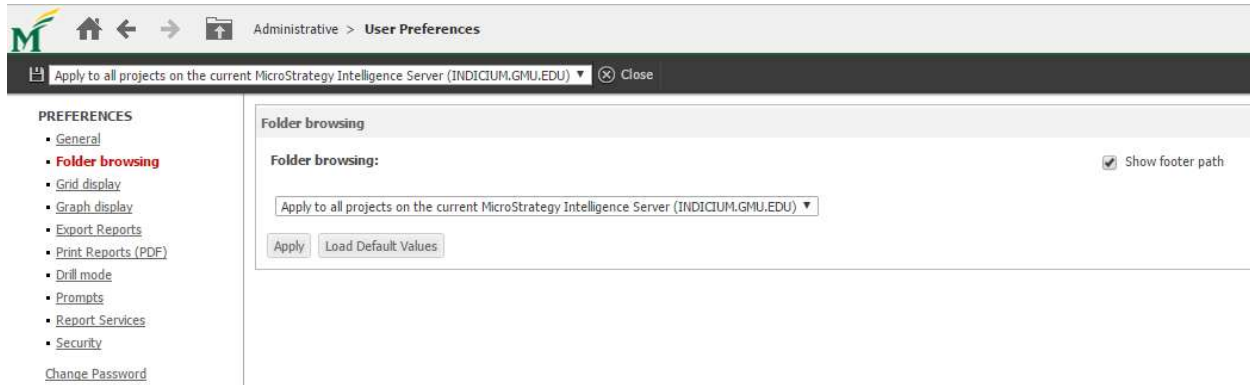
The folder location path is listed at the top, in this example, to show the user has navigated to the Administrative Project, Shared Reports folder, Department Reports folder



If you would also like to display the file path in the footer, click on the arrow next to your username and select Preferences



Select folder browsing and check the Show footer path box



Click Apply. Click on the Mason logo and navigate to any report folder. You will then see the file path displayed at the bottom of your screen

