

MicroStrategy Quick Guide: Personal View

PERSONAL VIEW

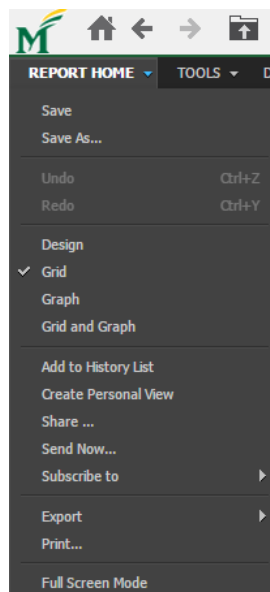
The Business Intelligence Group recommends creating personal views of existing reports when possible instead of saving copies of existing reports. A personal view is a custom view of a report that retains your changes to the report, such as prompt answers, view filters, sorting, etc.

Personal views are accessible via the My Subscriptions page within MicroStrategy, however these subscriptions are not run automatically. Personal view subscriptions are available on demand by using the links within the My Subscriptions page.

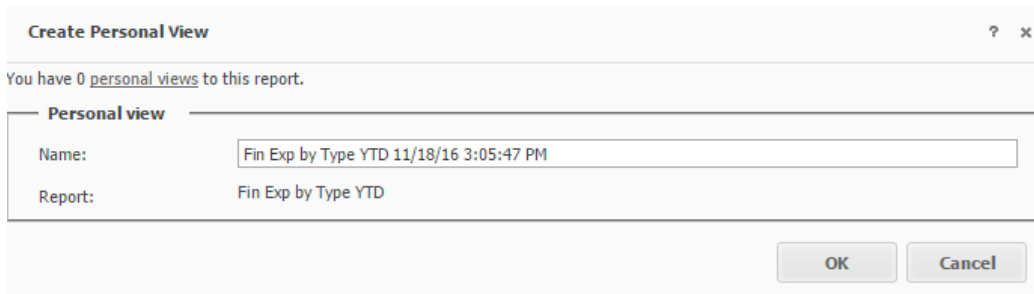
CREATE A PERSONAL VIEW

Use these instructions to create a personal view.

1. Run a report with the prompt answers that you wish to use for the personal view
2. Make changes to objects on the report as needed – some examples:
 - a. Change sorting
 - b. Add View Filter
 - c. Remove attributes/metrics from Grid
3. Click the arrow next to Home, then Create Personal View



4. Name the personal view and click OK to save

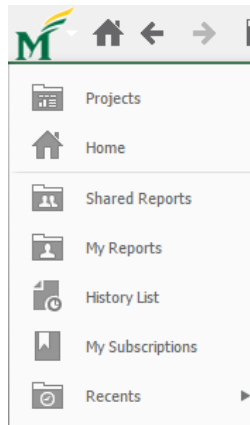


The dialog box is titled "Create Personal View" and has a close button (X) in the top right corner. Below the title bar, it says "You have 0 personal views to this report." The main section is labeled "Personal view" and contains two fields: "Name:" with the value "Fin Exp by Type YTD 11/18/16 3:05:47 PM" and "Report:" with the value "Fin Exp by Type YTD". At the bottom right, there are two buttons: "OK" and "Cancel".

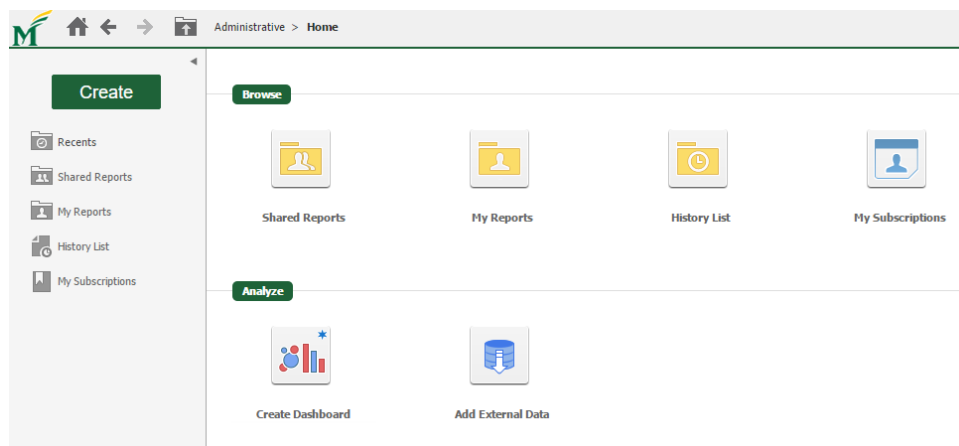
ACCESS A PERSONAL VIEW

Use these instructions to access a personal view that you already created.

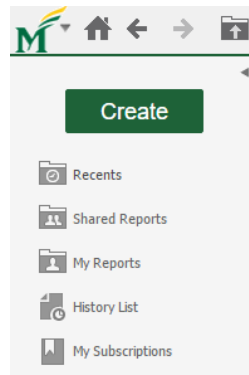
1. Navigate to My Subscriptions (there are 3 ways to do this)
 - a. Click the Mason logo in the top left of the screen, click My Subscriptions



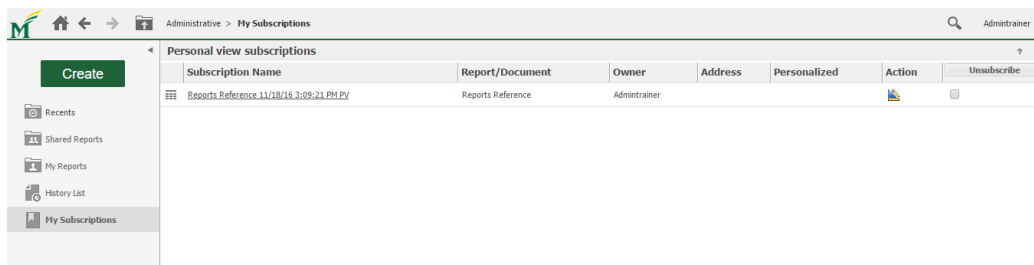
- b. Navigate to the Home page, then click My Subscriptions



- c. Click My Subscriptions from the left navigation bar





2. In this view, you will see all of your subscriptions. The section titled “Personal view subscriptions” contains your personal views. Click the subscription name to access your personal view.



EDIT A PERSONAL VIEW

Use these instructions to edit an existing personal view.

1. Navigate to My Subscriptions
2. Click the  icon to rename or change prompt answers for an existing personal view.
3. Click the  icon to change prompt answers for an existing personal view.