


# MicroStrategy Quick Guide: Subscribing to a Report

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.


## SUBSCRIBE TO A REPORT

1. Navigate to the folder containing the report or document.
2. Hover your mouse over the report or document, and click Subscriptions.


Folder




**Brand Performance by Region**  
**Owner:** Administrator  
**Modified:** 11/15/16 8:26:51 AM  
This report displays the top 5 brands by revenue from each customer region.  
[Edit](#) [Subscriptions](#) [Send Now](#) [Export](#) [PDF](#)




**Electronics Sales over Time**  
**Owner:** Administrator  
**Modified:** 5/18/15 2:12:54 PM  
This report shows the pattern of monthly sales for each subcategory within Electronics over a one year period.



**Revenue by Call Center**  
**Owner:** Karen Lalicker  
**Modified:** 11/15/16 1:31:53 PM




**Revenue vs. Forecast**  
**Owner:** Administrator  
**Modified:** 5/18/15 2:12:54 PM  
This report shows Revenues vs. Forecasted Revenues. Users can select the region, category, and time period they are interested in viewing. Thresholds in this report are built on the variance between Revenue and Forecast.



**US Revenues by Call Center**  
**Owner:** Administrator  
**Modified:** 5/18/15 2:12:54 PM  
This report shows yearly Revenues at the Call Center level in a graphical format.

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

**My Subscriptions Page**


Report Consumer Tutorial > **My Subscriptions**
?

Close

**Brand Performance by Region**  
**Owner** Administrator  
 This report displays the top 5 brands by revenue from each customer region.

**Personal view**

Subscription Name	Owner	Address	Personalized	Action
You do not have any personal views.				

**History List**

Subscription Name	Owner	Schedule	Recipient	Personalized	Action
You do not have any History List subscriptions.					
<a href="#">Add history list subscription</a>					

**Cache Update**

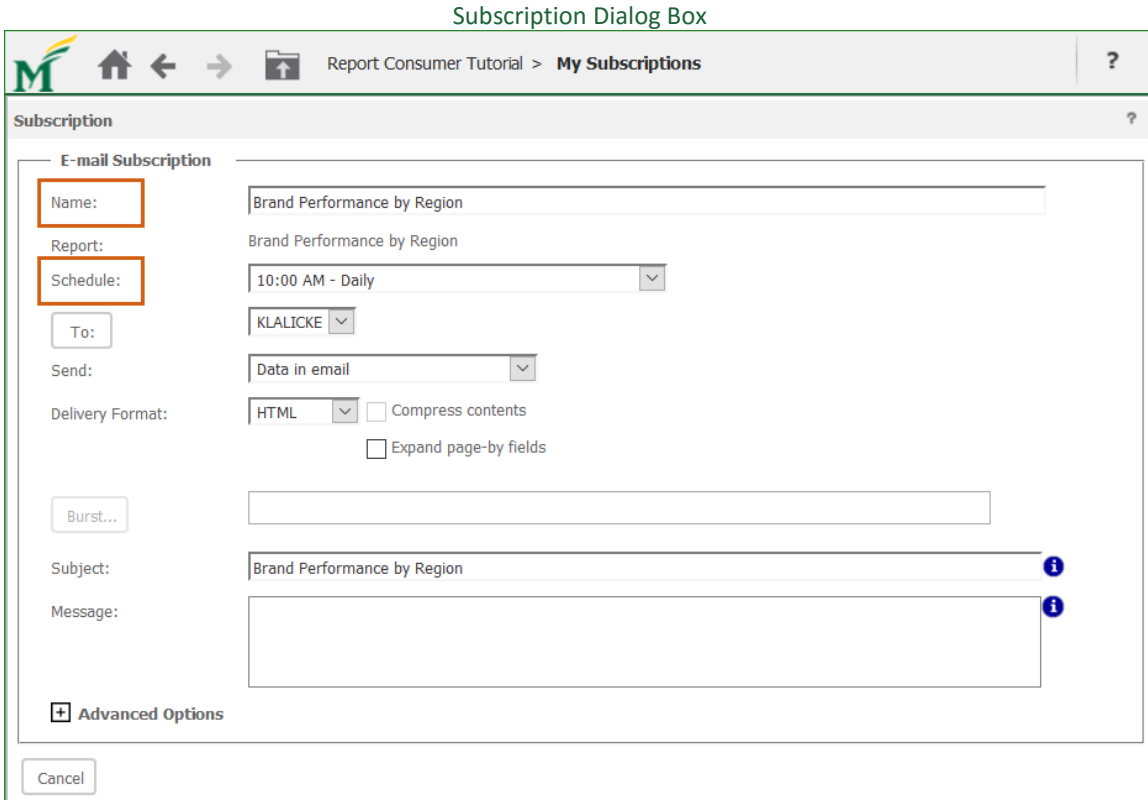
Subscription Name	Owner	Schedule	Recipient	Personalized	Action
You do not have any cache update subscriptions.					
<a href="#">Add cache update subscription</a>					

**Email**

Subscription Name	Owner	Schedule	Recipient	Address	Personalized	Action
You do not have any email subscriptions.						
<a href="#">Add email subscription</a>						

4. On the E-mail Subscription dialog box, in the Name field, type a name for the subscription.
5. From the Schedule drop-down list, select a schedule on which to deliver the report or document.

Subscription Dialog Box



Subscription Dialog Box

Report Consumer Tutorial > My Subscriptions

**Subscription**

**E-mail Subscription**

Name: Brand Performance by Region

Report: Brand Performance by Region

Schedule: 10:00 AM - Daily

To: KLALICKE

Send: Data in email

Delivery Format: HTML ☐ Compress contents ☐ Expand page-by fields

Burst...

Subject: Brand Performance by Region

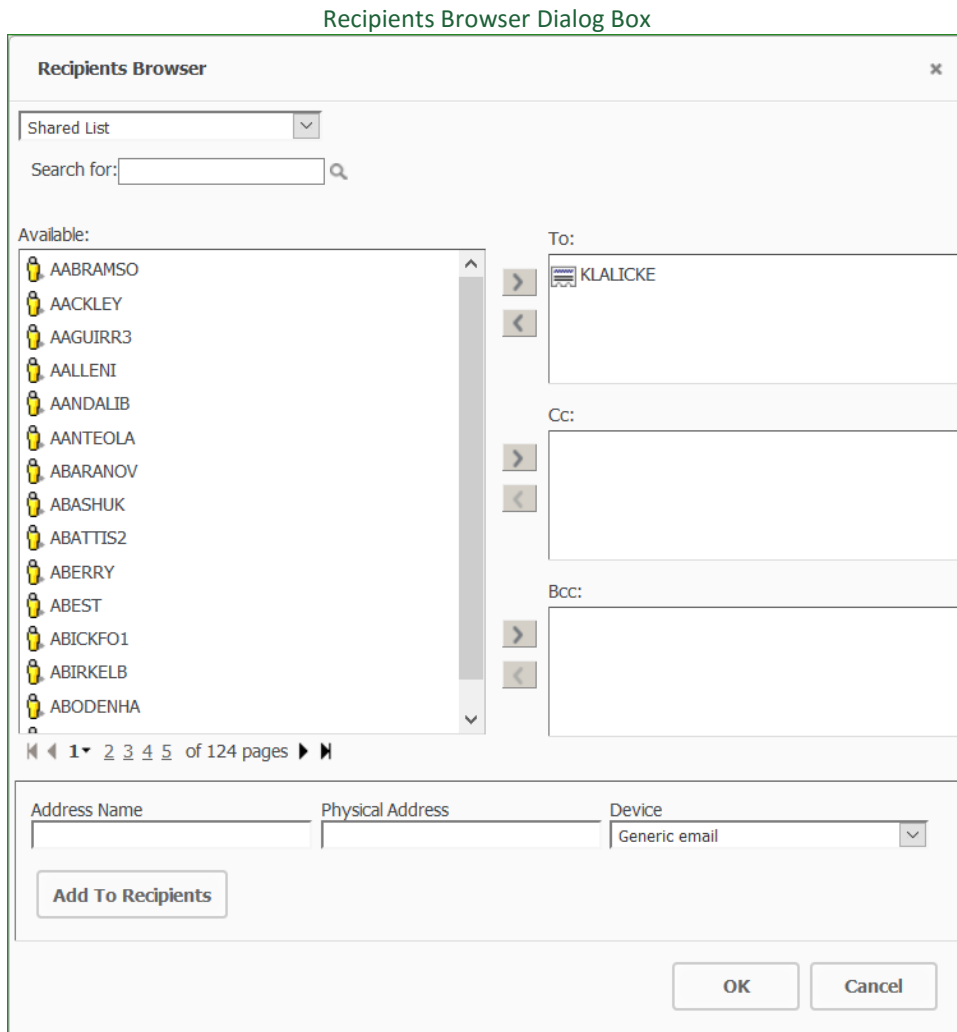
Message:

**Advanced Options**

Cancel

6. Define the recipients of the report or document. 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**



Recipients Browser

Shared List

Search for:

Available:

- AABRAMSO
- AACKLEY
- AAGUIRR3
- AALLENI
- AANDALIB
- AANTEOLA
- ABARANOV
- ABASHUK
- ABATTIS2
- ABERRY
- ABEST
- ABICKFO1
- ABIRKELB
- ABODENHA

To:

Cc:

Bcc:

Address Name Physical Address Device

Generic email

Add To Recipients

OK Cancel

7. On the E-mail Subscription dialog box, from the Send drop-down list, specify how the report or document is included in the email:
  - a. To include the report or document in the email, select Data in email.
  - b. To include the report or document in the email and also deliver it to the History List, select Data in email and to history list.

- c. 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.
- d. To only include a link to the History List location of the report or document in the email, select Link to history list in email.

**Send Options**

Send: Data in email ▼

Data in email

Data in email and to history list

Data and link to history list in email

Link to history list in email

8. From the Delivery Format drop-down list, select the format in which to send the report or document. If you select HTML, the report or document displays in the body of the email. When any other option is selected, the report or document is included as an attachment to the email.

**Delivery Format Options**

Delivery Format: HTML ▼ ☐ Compress contents

HTML

PDF

Excel

Plain Text

CSV

☐ Expand page-by fields

- a. Type a name for the attachment in the File Name field.
- b. You can reduce the attachment file size by including it in a zip file. To do this, select the Compress contents check box.
- c. If the report has objects on the page-by axis, you can include the data for all page-by elements or include the data for only the selected page-by elements. To include all page-by elements, select the Expand page-by fields check box.

**Additional Delivery Format Options**


Delivery Format: Excel ▼ ☐ Compress contents

☐ Expand page-by fields

File Name: Brand Performance by Region ⓘ Delimiter:   ⓘ

9. In the Subject field, type a subject for the email.
10. In the Message field, type a message to display in the body of the email.
11. To deliver a test email with a preview of the report or document, select the Send a preview now check box.

**Additional Subscription Options**

Subject:	<input type="text" value="Brand Performance by Region"/>	
Message:	<div style="border: 1px solid #ccc; height: 40px;"></div>	
<input type="checkbox"/> Send a preview now		

12. Expand the Advanced Options.
  - a. For reports or documents included in an attached zip file, you can add a password to the zip file for additional security. Select the Password protect zip file check box and type a password for the zip file. This option is available only when the Compress Contents check box is selected.
  - b. For reports or documents included in an attached zip file, you can specify a name for the zip file. Type the name in the Zip File Name field. This option is available only when the Compress Contents check box is selected.
  - c. To specify a date after which to stop delivering the report or document, select the Do not deliver after check box, then select the date from the calendar.

**Advanced Options**


☒ **Advanced Options**

**Compression**

☐ Password protect zip file

Zip File Name

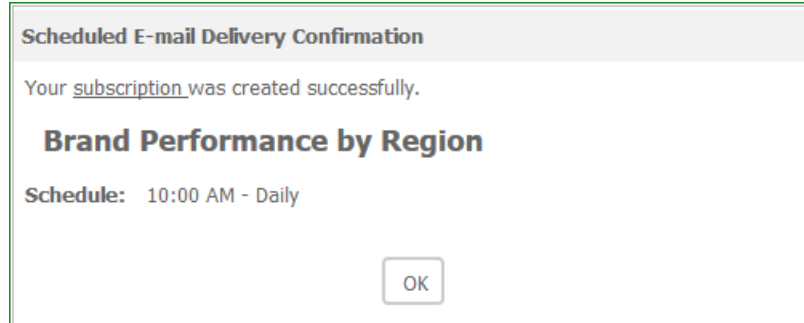
**Delivery**

☐ Do not deliver after  

☐ Use contact security for each contact group member

13. If the report or document is prompted, the prompts display below the Advanced Options. The selections you make for these prompts will be used each time the report or document is delivered.
14. Click OK to create the subscription. The Subscription Confirmation dialog box displays.

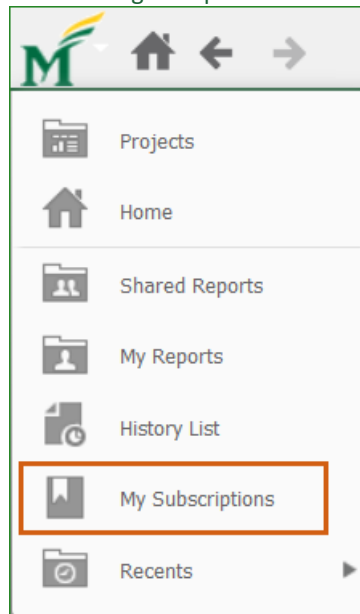
### Subscription Confirmation



## VIEW EXISTING SUBSCRIPTIONS




1. To verify that you are subscribed to a report or document, click the Mason logo down arrow at the top of the page.
2. From the drop-down menu, select My Subscriptions.

### Mason Logo Drop-down Menu



3. Your subscription appears in the E-mail Subscriptions list.







### E-mail Subscriptions List

E-mail Subscriptions									
Subscription Name	Report/Document	Owner	Schedule	Recipient	Address	Personalized	Action	Unsubscribe	
 Brand Performance by Region	Brand Performance by Region	Karen Lalicker	10:00 AM - Daily	Karen Lalicker	KLALICKE			<input type="checkbox"/>	

## MODIFY AN EXISTING SUBSCRIPTION

1. Navigate to My Subscriptions.
2. On the My Subscriptions page, in the E-mail Subscriptions List, for the subscription you want to change, in the Action column, click the Edit button.
3. To change prompt answers for an existing subscription, in the Action column, click the Personalize button.

E-mail Subscriptions List

E-mail Subscriptions <span>?</span>								
Subscription Name ▲	Report/Document ↙	Owner ↙	Schedule ↙	Recipient ↙	Address ↙	Personalized ↙	Action	Unsubscribe
 <a href="#">Brand Performance by Region</a>	Brand Performance by Region	Karen Lalicker	10:00 AM - Daily	Karen Lalicker	KLALICKE			<input type="checkbox"/>
 <a href="#">Revenue vs. Forecast</a>	Revenue vs. Forecast	Karen Lalicker	10:00 AM - Daily	Karen Lalicker	KLALICKE		 	<input type="checkbox"/>