

MicroStrategy Quick Guide: Self-Start Training Plan

GETTING STARTED

You've been granted access to MicroStrategy, perhaps you've signed up for a training class, yet you're itching to start. With the resources you'll find on reporting.gmu.edu, you can log on, get started, and even learn quite a lot on your own.

Here is the Self-Start Training Plan with our suggestions of essential training materials in an easy-to-follow order. All resources are available under Training and Workshops on reporting.gmu.edu.

KEY LINKS:

[Business Intelligence Group](#)

[Training and Workshops-](#)

QUICK GUIDES

First, open the [Navigation Guide](#). This will guide you through how to log on to MicroStrategy, teach you about Projects, My Reports, Department Reports, and how to understand where reports are located in MicroStrategy.

Once you're oriented in MicroStrategy, you will want to run reports. We have three Quick Guides tailored to different MicroStrategy projects and business areas, under Running Reports Documents and Dashboards:

- Academic/Admissions
- Administrative/Finance
- Administrative/HR

We also suggest these Quick Guides to round out your self-start experience:

Getting Started

- My Reports – This Quick Guide will teach you how to add existing reports to your own personal My Reports folder
- Subscribe to History List – in addition to adding reports to My Reports, you can create a History List

- Search – MicroStrategy offers a variety of ways to search for reports and report attributes
- User Preferences – this Quick Guide shows you how to personalize your MicroStrategy viewing experience

Manipulating Reports

- Change the View Mode of a Report – this Quick Guide will show you how to switch between grid and graph view modes
- Custom Subtotals – this Quick Guide will show you how to manipulate and create custom subtotals on reports
- Page By – this Quick Guide will teach you about Page Bys, or within report drop-down filters, and how to use them
- Personal Prompt Answers – this Quick Guide will teach you how to save custom, default answers to reports. This will allow you to run reports more efficiently.
- Sorting – this Quick Guide will show you how to create simple and advanced sorting in your reports
- Totals – this Quick Guide will teach you how to work with Grand and Subtotals in MicroStrategy
- View Filter – this Quick Guide will help you learn how to create additional report filters on your reports

Exporting Data

There are many different ways to export data from MicroStrategy to other platforms. These Quick Guides will help you get started:

- Exporting to Excel
- Exporting to PDF

Reports Reference

We have converted many reports from Discoverer to MicroStrategy, and have created many new reports as well. MicroStrategy reports are organized into folders and to help you find the report that interests you, please log in to MicroStrategy and run “Reports Reference” report available under the “Shared Reports” folder.



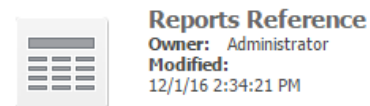
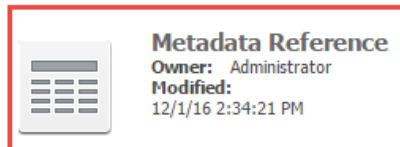
Metadata Reference
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Reports Reference
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Metadata Reference

The metadata (objects such as attributes, filters, prompts and metrics) are also organized differently in MicroStrategy. To help orient you as to what objects can be found where, please log in to MicroStrategy and run “Metadata Reference” report available in the “Shared Reports” folder.



Further Training

Now that you’ve self-trained, you’re probably feeling pretty comfortable with MicroStrategy and see how easy and user-friendly it is.

If at any time you want more training on the product, we offer the following:

- Quick Guides – if you have questions, check the Quick Guides section to see if any additional guides meet your needs
- Office Hours – The Business Intelligence Group will routinely offer Office Hours training either as a classroom-based session or as a session you can schedule individually at your office. During these classroom-based sessions you can drop in to our computer-enabled classroom you and our staff will be available to work with you one on one or in small groups on your reporting and MicroStrategy needs. Please email bigroup@gmu.edu to schedule Office Hours or to learn about our classroom-based sessions see workshops.gmu.edu.
- Report Consumer Training Sessions – The Business Intelligence Group will also routinely offer Report Consumer Training sessions, one hour of MicroStrategy training offered in a computer-enabled classroom to groups. These trainings will follow an agenda similar to what is outlined in the Self-Start guide, but in a more expanded format.