Quick Start Guide for Reporters

Before You Begin

You need a Virginia Tech PID and password to log into MicroStrategy. In addition, you must have data access as authorized by the university data stewards. The data stewards are university staff who oversee the capture, maintenance, and sharing of data for their operations. To request data access, please contact the relevant data steward as indicated on the Who to Contact page.

Overview

Virginia Tech’s new business intelligence (BI) system, MicroStrategy, is now online. MicroStrategy will eventually replace all enterprise reporting tools used to access university data marts. MicroStrategy is an improvement over the university’s current reporting tools because it provides greater flexibility, improved analytic capabilities, and a better user interface.

This document provides a very brief overview of how to access MicroStrategy and run a report. The process is broken down into small steps with plenty of screenshots.

You can click the links below to jump to each step:

- Step 1: Go to the MicroStrategy website
- Step 2: Login into CAS
- Step 3: Click on the Production project
- Step 4: Go to the Shared Reports section
- Step 5: Select your subject area
- Step 6: Select the report to run
- Step 7: Select the filters for your report
- Step 8: Click the Run Document button
- Step 9: View your report
- Step 10: Access help resources

Step 1: Go to the MicroStrategy website

Click the link below, or type the address into your browser of choice.

[Unknown macro: ‘link-window’]

Step 2: Login into CAS

Your browser might redirect you to login via VT’s Central Authentication System (CAS). Enter your Virginia Tech PID and password to login.

Step 3: Click on the Production project
The Production project is the only one shown.

Step 4: Go to the Shared Reports section

Click on Shared Reports.

Step 5: Select your subject area

The example below shows the pilot project, which is under the STUDENT area for SPOT users.

A finance user would see a folder for FINANCE, etc.

(Note: You can ignore the Utilities folder, it's just there to help make your reports work.)
Step 6: Select the report to run

Within your subject area folder you will see the reports that you can run. Each report is listed with a description of the report's content. In this example, we'll run the SPOT-0002 report.

Step 7: Select the filters for your report

Use the filter prompts to limit the data included in your report. These prompts use a shopping cart design.

For each prompt, move items from the Available list to the Selected list. Here are several ways to do this:

- single-click an item on the left to highlight it, then click the Add button to move it to the Selected list
- double-click an item on the left to move it to the Selected list
- click the Add All button (the one with two arrows) to select all items at once

Likewise, the Remove and Remove All buttons (the left-pointing arrows) remove items from the Selected listbox.

Step 8: Click the Run Document button

The Run Document button is located in the lower-left corner of your browser window.

Step 9: View your report

Your report will look something like the one shown below.

Near the top of the browser window is a MicroStrategy action bar with options to return to the homepage, close the report, print, and so on.

On the right is a help menu (more on this in the next section).

The report header includes the Virginia Tech logo, the aforementioned help menu, report title, and so on.

Note: The image below shows no data due to confidentiality requirements. Rather than seeing "no data returned" you would see the content of your report, be it tabular data, charts, or some combination.
Step 10: Access help resources

Help menu on report

Hover your mouse pointer over the Help button, then click on the down-arrow that appears to open the help menu.

The links on the menu are as follows:

- Help for this document: opens a webpage with information tailored to the report you are viewing
- BI Hub: opens the BI Hub webpage. The BI Hub is an online community for sharing tips and solutions.
- Data Dictionary: opens a webpage with links to data dictionaries for each data area
- FAQ: opens a webpage that offers answers to some commonly asked questions
- Who to Contact: opens a webpage with a list of data steward contacts that can help you resolve questions about the data in the report

Help icon in upper right of browser window

After you first login to MicroStrategy, there is a help icon shaped like a question mark located in the upper-right corner of your browser window. Click this button to access Virginia Tech’s MicroStrategy help page. This page offers links to training videos and PDF documents that will provide you with more in-depth information on the many features MicroStrategy offers to help provide you with the data you need.

Click the link below to access the help page:

https://webapps.es.vt.edu/confluence/display/IWA/MicroStrategy