

# MicroStrategy Knowledgebase FAQs

Lasted Updated: February 26, 2015

Description:

This document contains DRGR Frequently Asked Questions organized by module and includes step-by-step instructions to many of the more complicated DRGR functions.

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# Module: Reports

**Category: Reports – General**

# How do I access the Reports module in DRGR?

Updated: 2/26/2015

You can access the Reports Module in DRGR from any computer that can run an internet browser. As with the main DRGR system, the Reports module works best with Internet Explorer.

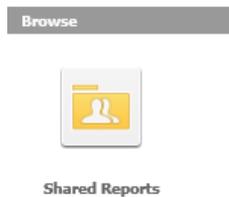
To access the Reports module, use the **Reports** link in the main DRGR menu. This will open a separate web browser for Microstrategy Reporting. It displays DRGR project as well as any other projects you have permissions to access.

When the new Microstrategy browser window opens, follow the path in Steps 1-4 shown in the graphic below to access User and HUD User Reports.

1.



2.



3.



4.



Source: DRGR Fact Sheet Microstrategy Reports Engine Upgrade, Release 7.9

Keywords: access reports, DRGR, reports, Reports Module

## What can I do under the DRGR Reports tab?

Updated: 2/26/2015

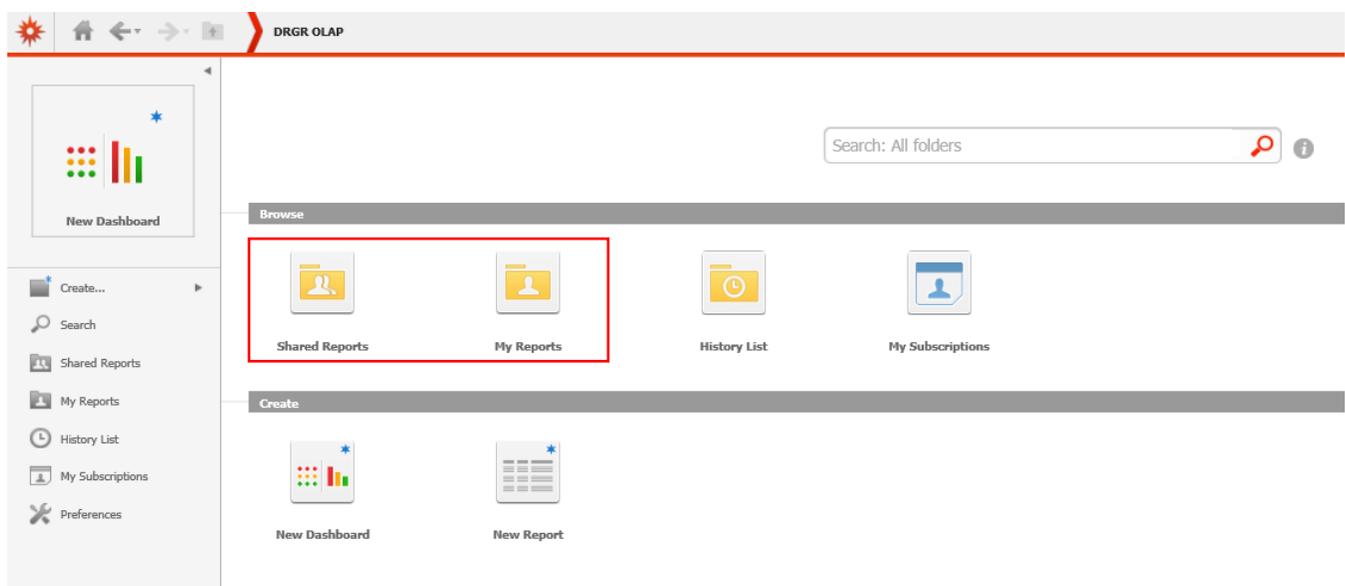
Reports provide a relatively quick and easy way of accessing the most up-to-date information in DRGR related to user accounts, obligations and drawdowns, report status, etc. All data in the Reports module is updated each night.

Reports can be useful for a number of reasons. DRGR users can:

- Quickly check the status of documents (Action Plans & QPRs).
- Troubleshoot common issues (e.g., user role issues) quickly and without the need to call for assistance.
- Create and save reports based on the information most useful to you.
- Use the 'Subscribe' function to receive reports on a regular basis.

The Reports module is optional, and is set up for the benefit of DRGR users. Unlike the other modules in DRGR, a grantee may choose to never use it.

The Reports module is accessed from the DRGR main menu, and opens as a new browser window (Microstrategy). Users will find two folders of reports in the DRGR Grant Folder: **Shared Reports** and **My Reports**. Shared Reports contains folders and reports that are available for other DRGR users, whereas **My Reports** are specific to your account. Users can save their personal reports in **My Reports**. In addition a tool called **My Subscriptions** is shown, which allows users to manage reports they would like to receive on a periodic basis.



Within the **Shared Reports folder** Microstrategy provides two categories of reports: **Public and Standard**.

**Public Reports** include interactive charts and graphs showing progress by grants, activity category or grantee projects, and contain any shared reports that can be accessed by all users.

**Standard Reports** include data files like spreadsheets used for tracking and quality control often containing data at the activity level. Standard reports are more commonly used by grantees. Within the Standard Reports folder, there are three categories of reports, summarized below:

- **Administrative Reports**, which include:
  - User information
  - Action Plan/QPR status
- **Financial Reports**, which include:
  - Budgets

- Disbursements
- Cumulative financial data
- **Performance Reports**, which include:
  - Beneficiary Measures

Grantee users can download MS Excel or PDF versions of reports and can modify reports for further data sorting and analysis.

Common modifications users perform include:

- Move and Sort Columns
- Grouping Columns
- Filtering Data

Please see additional Reports FAQs further information on modifying reports and working with the Microstrategy reports interface.

*Source: DRGR Fact Sheet Microstrategy Reports Engine Upgrade, Release 7.9*

*Keywords: access reports, DRGR, reports, Reports Module, basic report uses, use of reports*

## What does the date showing under a Microstrategy report mean (DRGR)? How often are reports updated?

Updated: 9/19/2012

The date showing under the title of each report is the last time it was modified for format and content by HUD HQ staff. However the contents of the report itself should pull “current” data from the different parts of DRGR: expenditures would be based on what has been entered in QPRs; budgets from the latest version of the Action Plan; obligations and expenditures from the drawdown module.

Microstrategy data is updated each night.

The screenshot displays the 'Grantee User Reports' interface. On the left is a navigation sidebar with a 'New Dashboard' icon and a tree view containing 'Shared Reports' (Public, Standard, Grantee User Reports) and 'My Reports'. The main area shows a grid of report cards. Each card includes a title, owner (James Yerdon), a modification date (11/26/14 5:55:26 PM), and a brief description. The date '11/26/14 5:55:26 PM' is highlighted with a red box in the 'Admin Rept02b' card. The breadcrumb at the bottom reads 'DRGR. OLAP > Shared Reports > Standard Reports > Grantee User Reports'.

Report Title	Owner	Modified	Description
Admin Rept01a: GRANT- DRGR Grant Status and CPD Contact	James Yerdon	11/26/14 5:55:26 PM	This report shows grant status, including drawdown and obligation blocks. It also includes CPD contact for each grant. If info needs to be updated, please send to DRGR_Help@hud.gov
Admin Rept02a: ACTPLN- Action Plan Review Status	James Yerdon	11/26/14 5:55:26 PM	This report shows whether grant is blocked from drawdowns as well as the date of the last DRGR AP approval and the current status of the DRGR AP.
Admin Rept02b: ACTPLN- Activity Status with Start and End Dates	James Yerdon	11/26/14 5:55:26 PM	Performance data in this report is aggregated measure types so the numbers are not meaningful in themselves. It is only include as an indicator of whether accomplishments were entered or not.
Admin Rept02b - with Act Start and End dates and ENV Status	James Yerdon	11/26/14 5:55:26 PM	This is a fully prompted report that can be used as a template for building other reports.
Admin Rept02c: ACTPLN- Activity Descriptions and Locations	James Yerdon	11/26/14 5:55:26 PM	
Admin Rept02d: ACTPLN - Community Need Narratives - Grant Level	James Yerdon	11/26/14 5:55:26 PM	This report shows the narrative entered for each community needs section in DRGR Action Plans for each grant
Admin Rept03a: QPR - Report Status	James Yerdon	11/26/14 5:55:26 PM	This report will only show the status of QPRs that have been added by grant. Grantees must add each QPR as they are due.
Admin Rept03b: QPR - Exec Summary Progress Narrative	James Yerdon	11/26/14 5:55:26 PM	This report shows the overall progress narrative at the grant level by QPR
Admin Rept03c: QPR Activity Progress Narratives			
Admin Rept03d: QPR - Reviewer Comments			

Source: HHQ E-mail 2/11/10

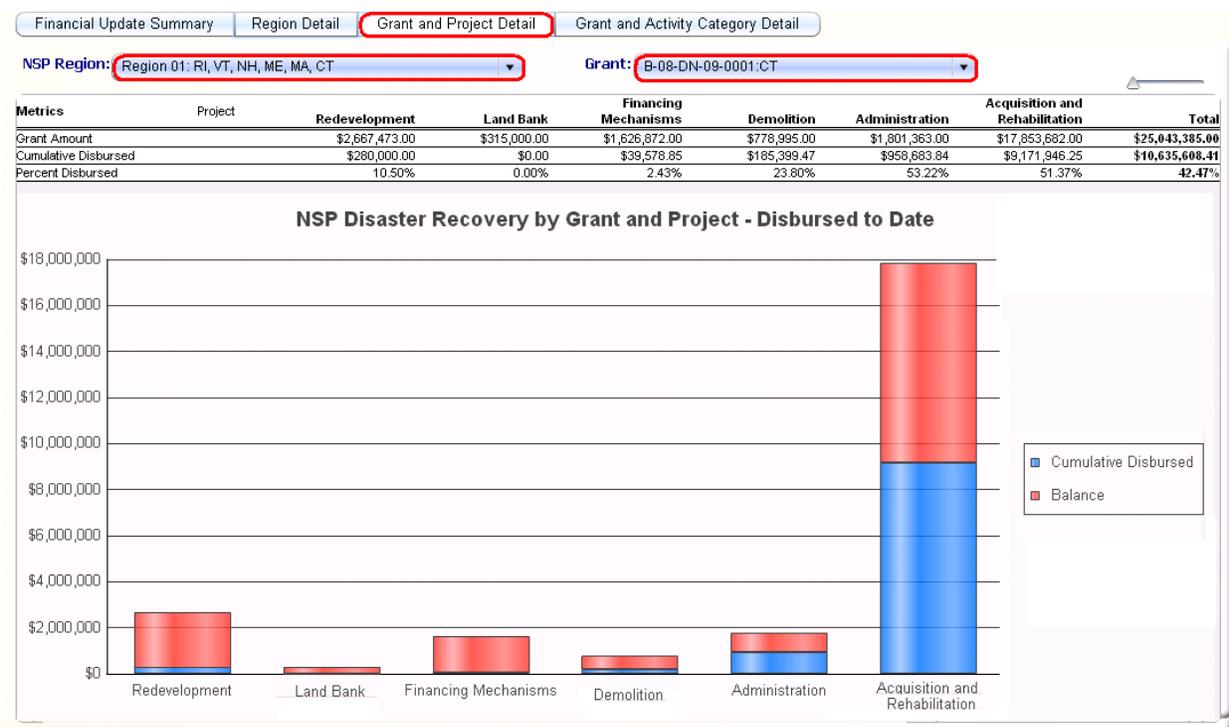
Keywords: DRGR, Microstrategy, reports, reports updated

## Are there Public reports showing Grant Financial Updates and Expenditure Analyses in the DRGR Reports Module? / Is there an easy way to show progress reports for projects and major activity categories on grants?

Updated: 9/27/2012

Many of the Standard Reports in Microstrategy show data at the activity and voucher level so HUD staff and grantees can compare grantee records to DRGR records and also conduct a wide variety of analysis. However, it can be difficult to understand the overall impact of different programs funded under grant and track their progress. Many published Action Plans only describe the major types of programs, but QPRs and Standard Reports often show very detailed records at the activity level.

The Microstrategy Reports module also includes **Public Reports** with customizable bar and line charts to show the status of programs under each grant. These Public Reports can produce very simple graphics with very little work required. As shown below, the Financial Update Dashboards provide tables detailing the amount of funds by grant, project, or activity category that have been disbursed in DRGR. The bar charts below the tables illustrate these disbursements and the amount of funds remaining by each of these groupings. In effect, the bar charts help user see the relative amount of funding across these groupings and how much progress has been made by each individual group.



While this report provides a snapshot of progress, the Quarterly Expenditure Analysis reports break these disbursements down across quarters using data from the Quarterly Progress Reports (QPRs). This allows users to examine spending trends by grants, projects, or activity categories across the life of the grants.



For both types of reports at the **Grant** level, users can customize the report using checkboxes at the bottom left showing projects and activity categories, depending on which type of public report is being viewed. Checking or unchecking boxes can help DRGR users target reports to specific audiences or change the scale shown on the axis of the report. For the expenditure analysis, users can also choose specific time periods. Users will see a **Slider** on the right hand side above the legend that can be moved back and forth depending on whether the user wants to customize these legends or whether they are ready to export and print them. Both types of reports can be output as PDFs for email or posting to websites.

In addition to the Public Reports available in the Microstrategy Reports module, as of DRGR Release 7.10, a **Public Data Portal** is also now available at: <https://drgr.hud.gov/public/>. The **Public Data Portal** provides information in a user-friendly format and does not require special access to DRGR.

Source: DRGR Fact Sheet: Release 7.0, dated 8/26/2010; DRGR Fact Sheet Public Data Portal, Release 7.10

Keywords: dashboard, DRGR, expenditure analyses, Expenditure Analysis, Financial Updates, grant financial updates, Reports Module, snapshot, DRGR Public Data portal

# Category: Modifying Reports

# What do I do if the Microstrategy Report does not have a "Page by" option that allows me to select "Grantee" or "Grant"?

Updated: 2/26/2015

In order to view the Page-By fields please go to the Toolbar click on the **Tools** menu, then **Page-by Axis** to make sure this is selected (noted with a checkmark).

Note there are other functions that can be turned on/off via the **Tools** menu (e.g. Sort buttons).

The screenshot shows the Microstrategy report interface. At the top, the title bar reads "Perf Rept01: CUM - Projected vs Cum Totals for Performance Measure Sorted by Activity Number". Below the title bar is a navigation menu with "Home", "Tools", "Data", "Grid", and "Format". The "Tools" menu is open, showing a list of options: "New...", "Create Dashboard", "Report Objects", "Notes", "Related Reports", "Page-by Axis" (checked and highlighted with a red box), "View Filter", "Report Details", "Pivot Buttons", "Sort Buttons", "Report Bar", "Report Options...", "Report Details Page", and "Custom Visualizations...". The background shows a report table with columns for "Activity Type", "Responsible Organization", and "Measure Type". The table contains data for various housing assistance programs, all managed by "Adams County Community Development".

Activity Type	Responsible Organization	Measure Type
Homeownership Assistance to low- and moderate-income	Adams County Community Development	# of Households # Owner Househ
...	...	...
... - general	Adams County Community Development	# of Households # of Housing Unit # of Singlefamily I # Owner Househ
... - general	Adams County Community Development	# of Households # of Housing Unit # Owner Househ
... Banking - Acquisition (NSP Only)	Adams County Community Development	# of Housing Unit
... rance and Demolition	Adams County Community Development	# of Housing Unit
... struction of new housing	Adams County Community Development	# of Housing Unit

Source: Senior DRGR Staff (MM email, dated 1/28/2011); Microstrategy Reports Engine

Keywords: page-by, reports, tools menu

# How can I modify DRGR reports in Microstrategy?

Updated: 2/26/2015

Report modifications can be completed in multiple ways with Microstrategy:

- Use the toolbar/ribbon
- Drag objects
- Right click over the object for different options

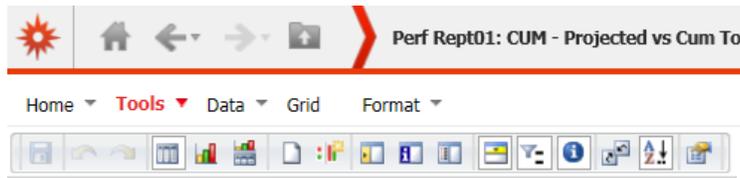
## Toolbar/Ribbon Functions

With Microstrategy Version 9, there is a new look and functionality for reports, including **five tabs** at the top of the report screen:

- Home
- Tools
- Data
- Grid
- Format

Each tab has icons in the toolbar (or ribbon). Several icons repeat for each tab, while most are unique to each tab.

The Home, Tools, Data and Format tabs also have drop-down menus that give the same options as the icons. The Grid tab only provides icons on the toolbar.



ICONS/TOOLBAR functions



## TABS

Home ▾ Tools ▾ Data ▾ Grid ▾ Format ▾

REPORT DETAILS

Report Filter: {{Grant Status} = Active

VIEW FILTER Th

PAGE-BY: Grantee:

Activity Number ▲ Act

Activity Number	Responsible Organization	Measure Type	Me
NSP08.01	Hor	# of Households	
NSP08.02	Acc	# of Households	
NSP08.03	Acc	# of Housing Units	
NSP08.04	Lan	# of Singlefamily Units	
NSP08.05	Der	# Owner Households	
NSP08.06	Rec	# of Households	
		# of Housing Units	
		# Owner Households	
		# of Households	
		# of Housing Units	
		# Owner Households	
		# of Housing Units	
		# of Housing Units	
		# of Housing Units	

DROP-DOWN MENU functions

!PR Measure Actual Quantity} >

Auto-Apply changes

Grant Number: B-08-UN-08-0001 Program: NSP Appropriation: NSP1

## Drag Objects Functions

In addition to using the icons in the toolbar, users can complete some functions by dragging objects. For example, the **Page-By** function, which filters report display, can be completed by dragging an object to the **Page-By ribbon**. Below is an example of dragging the **Activity Title** column to the **Page-By ribbon** so that all results are filtered by the Activity Title selected.

Perf Rept01: CUM - Projected vs Cum Totals for Performance Measure Sorted by Activity Number

Home ▾ Tools ▾ Data ▾ Grid ▾ Format ▾

REPORT DETAILS

Report Filter:  
 ((Grant Status) = Active) And (((Activity Measure Projected Quantity at Activity Number, Measure Type, Measure Category Level) > 0) Or ((QPR Measure Actual Quantity) > 0))

VIEW FILTER The filter is empty. Add Condition Auto-Apply changes

PAGE-BY: Grantee: Adams County, CO Grant Number: B-08-UN-08-0001 Program: NSP Appropriation: NSP1 **Activity Title**

Activity Number	Activity Title	Activity Type	Responsible Organization	Measure Type	Measure Category	Low
NSP08_01	Homebuyer Assistance	Homeownership Assistance to low- and moderate-income	Adams County Community Development	# of Households	Metrics Projected	0
				# Owner Households		0
				# of Households		9
NSP08_02	Acquisition & Resale	Acquisition - general	Adams County Community Development	# of Housing Units		0
				# of Singlefamily Units		0
				# Owner Households		9
				# of Households		9
NSP08_03	Acquisition & Resale 25% AMI	Acquisition - general	Adams County Community Development	# of Housing Units		0
				# Owner Households		9
NSP08_04	Land Banking	Land Banking - Acquisition (NSP Only)	Adams County Community Development	# of Housing Units		0
NSP08_05	Demolition	Clearance and Demolition	Adams County Community Development	# of Housing Units		0
NSP08_06	Redevelopment	Construction of new housing	Adams County Community Development	# of Housing Units		0

## Right-Click Functions

Finally, report modifications can be completed by right clicking objects. Right clicking will open a menu of modifications available. Below is an example of a **right-click** over the **Activity Type** column. Modifications available include sorting, moving the column and filtering data.

Activity Number ▾ Activity

NSP08\_01 Homebu

NSP08\_02 Acquisiti

NSP08\_03 Acquisiti

NSP08\_04 Land Ba

NSP08\_05 Demolit

NSP08\_06 Redevel

Drill

Sort

Insert Metric

RIGHT-CLICK functions

Move

Filter On...

Keep on grid

Remove from Grid

Advanced formatting...

Rename/Edit...

Attribute Forms

Derived Elements...

DRGR OLAP > Reports > Grantee User Reports

Users should explore these functions in the Microstrategy reports module to gain familiarity with how to modify reports and what modification are most useful. In addition, more information is available in DRGR Fact Sheet Microstrategy Reports Engine Upgrade, Release 7.9.

Source: DRGR Fact Sheet Microstrategy Reports Engine Upgrade, Release 7.9; Microstrategy Reports version 9

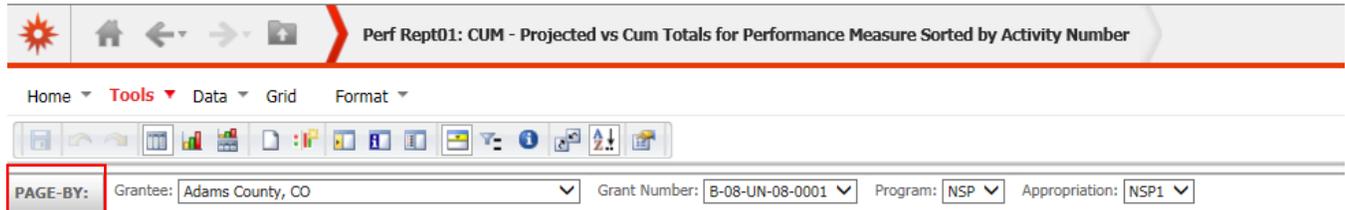
Keywords: DRGR, modify reports, modifying reports, reports

## How can I show only the data for certain groups of records like a grant or grantee in a DRGR report? /How do I create a filter for a report?

Updated: 2/26/2015

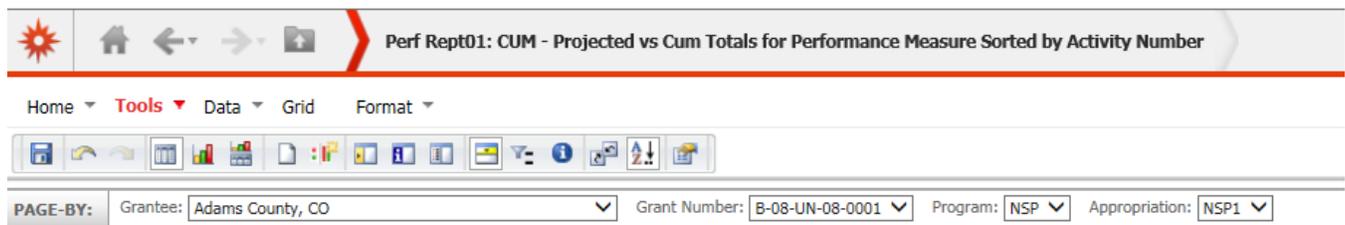
**Page-By** filtering allows users to filter a report after the report is generated in the Microstrategy reports module.

The Page-By listing takes priority from left to right. The left-most Page-By filter will be applied first, then move to the right for the next command.



The drop-down menus on the Page-By axis allow users to select specific criteria to filter the report to make it easier to view and find certain items.

Users can add items to the Page-By filter by right clicking and using the **Move** and then **To Page-by Axis**



Users can also add items to the **Page-By Axis** by dragging the objects to the axis. Items can be dragged and placed in any location on the axis based on the filtering priority desired.

Source: DRGR Fact Sheet Microstrategy Reports Engine Upgrade, Release 7.9; Microstrategy Reports version 9

Keywords: DRGR, filter report, modify reports, page by, reports, show certain data

# How can I display groups of related numeric data in separate columns instead of rows?

Updated: 5/7/2010

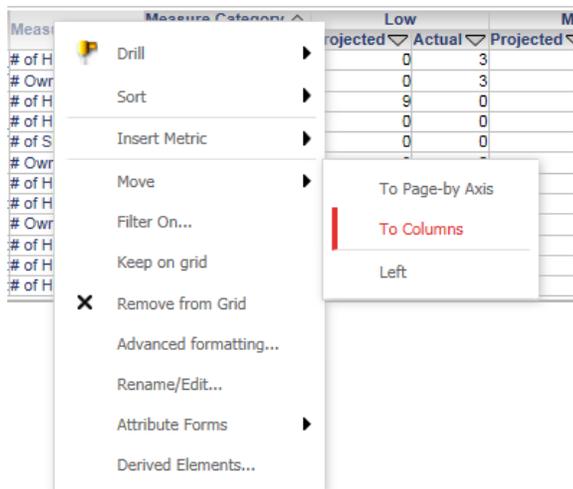
Data in rows can be **moved to columns** to group data for purposes of analysis or to organize data in different ways. This is typically more useful when moving data that only includes a few categories rather than lots of categories.

Below is an example using Measure Type data.

The screen below shows the generated **Perf Rept01** report Measure Type data highlighted.

Activity Number	Activity Title	Activity Type	Responsible Organization	Measure Type	Measure Category	Low		Mod		Total	
						Projected	Actual	Projected	Actual	Projected	Actual
NSP08_01	Homebuyer Assistance	Homeownership Assistance to low- and moderate-income	Adams County Community Development	# of Households		0	3	4	1	4	4
				# Owner Households		0	3	4	1	4	4
				# of Households		9	0	6	9	15	14
NSP08_02	Acquisition & Resale	Acquisition - general	Adams County Community Development	# of Housing Units		0	0	0	0	15	14
				# of Singlefamily Units		0	0	0	0	15	14
				# Owner Households		9	0	6	9	15	14
NSP08_03	Acquisition & Resale 25% AMI	Acquisition - general	Adams County Community Development	# of Households		9	9	0	0	9	9
				# of Housing Units		0	0	0	0	9	9
				# Owner Households		9	9	0	0	9	9
NSP08_04	Land Banking	Land Banking - Acquisition (NSP Only)	Adams County Community Development	# of Housing Units		0	0	0	0	2	0
NSP08_05	Demolition	Clearance and Demolition	Adams County Community Development	# of Housing Units		0	0	0	0	3	0
NSP08_06	Redevelopment	Construction of new housing	Adams County Community Development	# of Housing Units		0	0	0	0	3	0

To move the Measure Type data to **Columns**, users can use the right mouse button to select **Move** and then **To Columns** (shown below) or use alternatively, can use the left mouse button to drag the item to above the data columns.



Once the **Move** is complete, each Measure Type will now show as a new column, with data for the Activities grouped accordingly (see next page).

Perf Rep01: CUM - Projected vs Cum Totals for Performance Measure Sorted by Activity Number

Search: All folders

Home Tools Data Grid Format

Last update: 2/16/15 12:14:04 PM

PAGE-BY: Grantee: Adams County, CO Grant Number: B-08-UN-08-0001 Program: NSP Appropriation: NSP1

Data rows: 6 | Data columns: 1 - 10 of 16

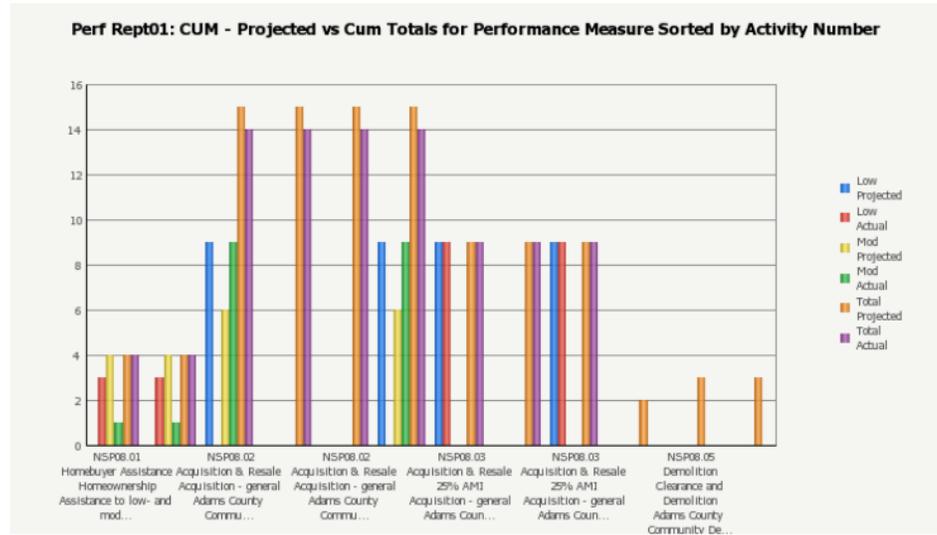
Activity Number	Activity Title	Activity Type	Responsible Organization	Measure Type Measure Category Metrics	# of Housing Units				# of Households				# Owner Households		
					Total		Low		Mod		Total		Low		
					Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	
NSP08_01	Homebuyer Assistance	Homeownership Assistance to low- and moderate-income	Adams County Community Development		0	0	0	0	3	4	1	4	4	0	0
NSP08_02	Acquisition & Resale	Acquisition - general	Adams County Community Development		15	14	9	0	0	6	9	15	14	9	0
NSP08_03	Acquisition & Resale 25% AMI	Acquisition - general	Adams County Community Development		9	9	9	9	0	0	9	9	9	9	0
NSP08_04	Land Banking	Land Banking - Acquisition (NSP Only)	Adams County Community Development		2	0	0	0	0	0	0	0	0	0	0
NSP08_05	Demolition	Clearance and Demolition	Adams County Community Development		3	0	0	0	0	0	0	0	0	0	0
NSP08_06	Redevelopment	Construction of new housing	Adams County Community Development		3	0	0	0	0	0	0	0	0	0	0

Source: DRGR Fact Sheet Microstrategy Reports Engine Upgrade, Release 7.9; Microstrategy Reports version 9

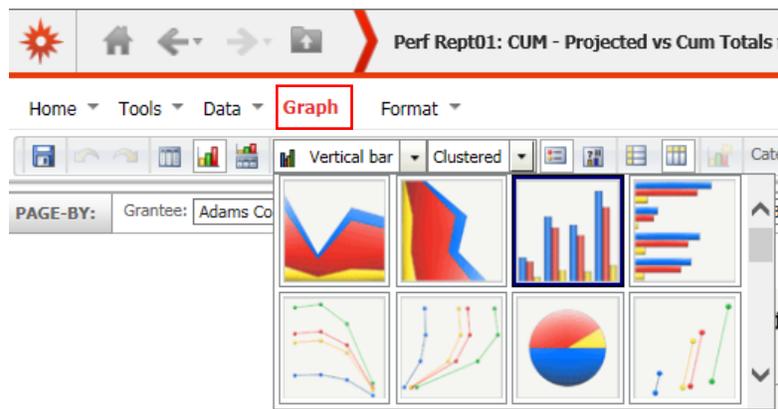
Keywords: move to columns, data by columns, modify reports, reports, separate columns



Users can display report data as a graph by using the **Graph** icon (or selecting **Graph** under the **Home** tab menu).



Once the graph is displayed, a **Graph** tab will be displayed, replacing the **Grid** tab. The **Graph** tab includes icons for use in changing the graph type and modifying formatting and presentation of the graphs.



Source: Microstrategy Reports version 9

Keywords: color, DRGR, format, graphs, modify reports, reports, Outline icon

## After I have modified DRGR reports, how can I save the modified versions of reports for future use?

Updated: 2/26/2015

Any changes in the report format can be saved and accessed in the future in the **My Reports** folder.

To save a modified report, users can use either the **Save icon** (shown below) or use the **Home** tab drop-down menu to **Save** or **Save As**.

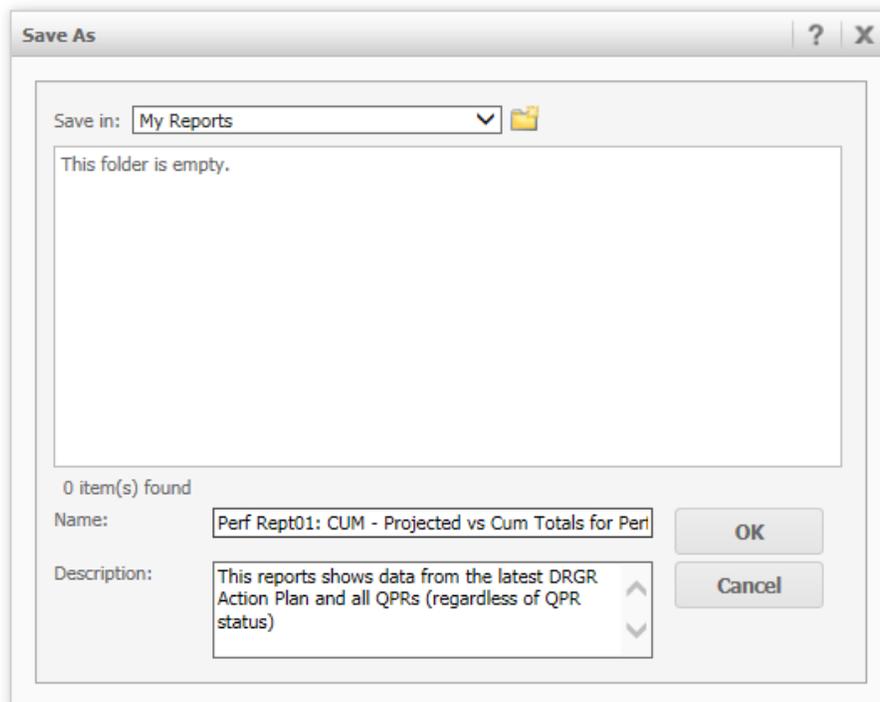
Perf Rept01: CUM - Projected vs Cum Totals for Performance Measure Sorted by Activity Number

Home Tools Data Grid Format

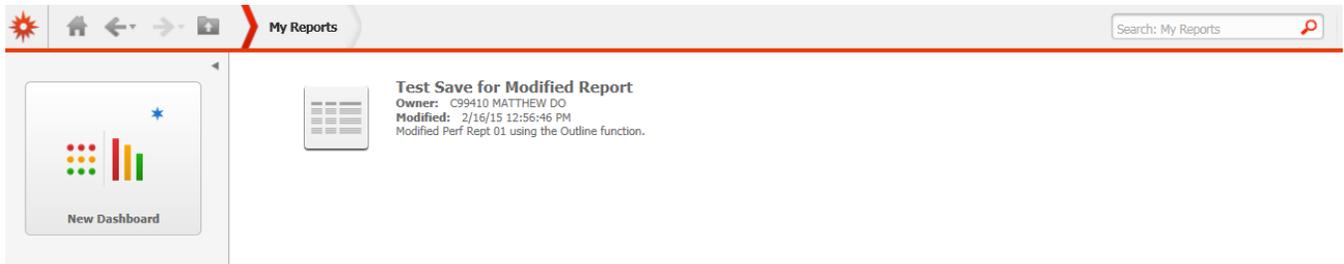
PAGE-BY: Grantee: Adams County, CO Grant Number: B-08-UN-08-0001 Program: NSP Appropriation: NSP1

Activity Number	Activity Title	Activity Type	Responsible Organization	Measure Type	Measure Category	Low		Mod		Total	
						Metrics	Projected	Actual	Projected	Actual	Projected
NSP08.01	Homebuyer Assistance										
	Homeownership Assistance to low- and moderate-income										
	Adams County Community Development										

Users should save the report in **My Reports**. Before saving, the report name can be changed. In addition, a **description** can be added for future reference.



To access the saved report, go to **My Reports** and locate the file name for the saved report.



Source: *Microstrategy Reports version 9*

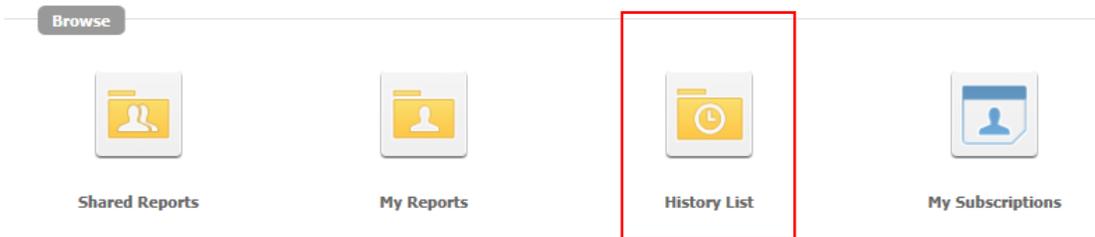
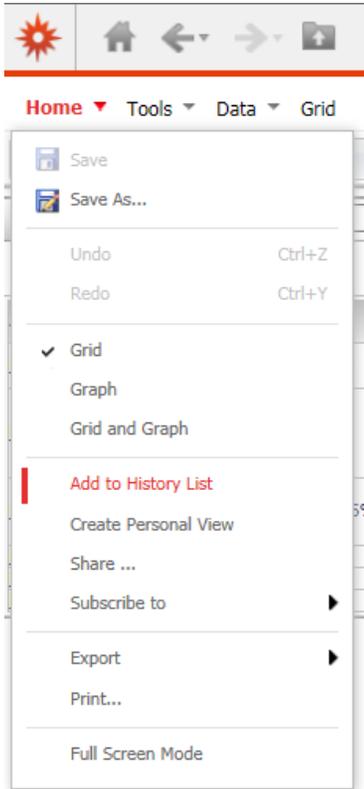
Keywords: *DRGR, modify reports, reports, save modified versions, My Reports*

**Category: Exporting/Saving Reports**

## How do I save a copy of a report with today's data?

Updated: 2/26/2015

If you want to save a copy of a report with today's data select '**Add to History List**' from the **Home** tab dropdown menu. The report will then be saved in the **History List** folder for your future use and can be accessed from the Microstrategy home screen, as shown below.



Items are saved in the History list for a limited time (approximately 90 days). To keep a permanent record of the report data, export it to either Excel or a pdf, and save it.

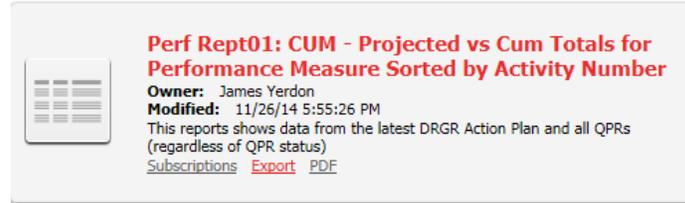
*Adapted from: pg. 15 - DRGR Reports Module Draft User Guide - provided 8/17/09; Microstrategy Reports version 9*

*Keywords: DRGR, exact data, history list, point in time data, reports, save a report*

# Can I access MS Excel or PDF Versions of Reports without opening/generating the reports in Microstrategy?

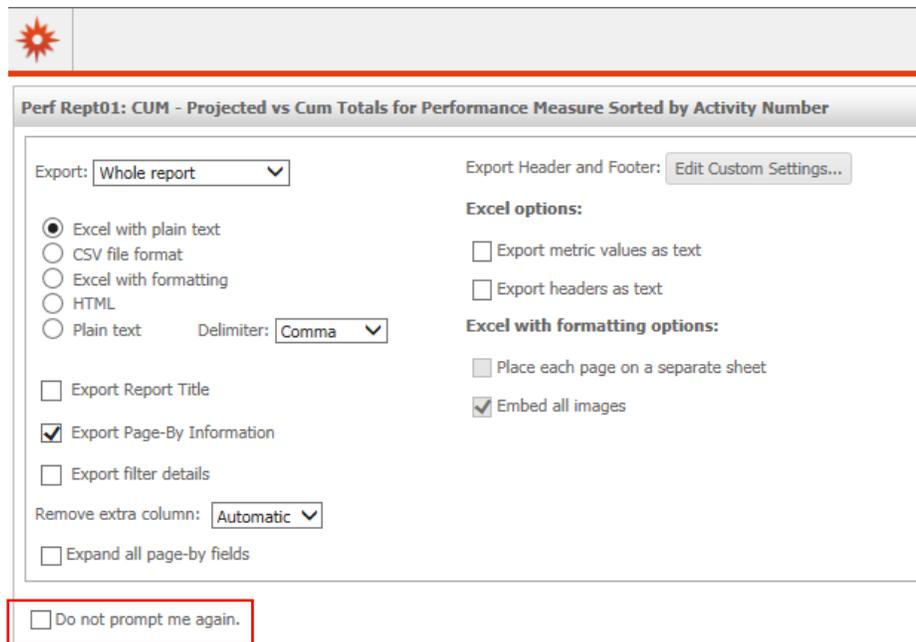
Updated: 2/26/2015

Yes, users can export without running a report. When you find a report you would like to export into MS Excel to do further analysis or as a PDF to share or publish, hover the mouse over the report and select either **Export** or **PDF**.



**Perf Rept01: CUM - Projected vs Cum Totals for Performance Measure Sorted by Activity Number**  
Owner: James Yerdon  
Modified: 11/26/14 5:55:26 PM  
This reports shows data from the latest DRGR Action Plan and all QPRs (regardless of QPR status)  
[Subscriptions](#) [Export](#) [PDF](#)

Selecting **Export** will allow users to save in an MS Excel format. The system will prompt you to choose the MS Excel export version. If you save it as **'Excel with formatting'** it will look and feel like the report displayed in Microstrategy with merged cells. As such, your ability to manipulate the data will be limited once it is in this formatted Excel version. However, users may find this version appropriate for presentation, printing and so on. If you save it as **'Excel with plain text'**, the file will repeat values in the merged cells so the data can be manipulated, but you will lose all formatting. For both types of MS Excel reports, you will have to set print areas and page layout settings in Excel for printing purposes.



Perf Rept01: CUM - Projected vs Cum Totals for Performance Measure Sorted by Activity Number

Export: Whole report

Export Header and Footer: Edit Custom Settings...

Excel with plain text  
 CSV file format  
 Excel with formatting  
 HTML  
 Plain text Delimiter: Comma

Export Report Title  
 Export Page-By Information  
 Export filter details

Remove extra column: Automatic

Expand all page-by fields

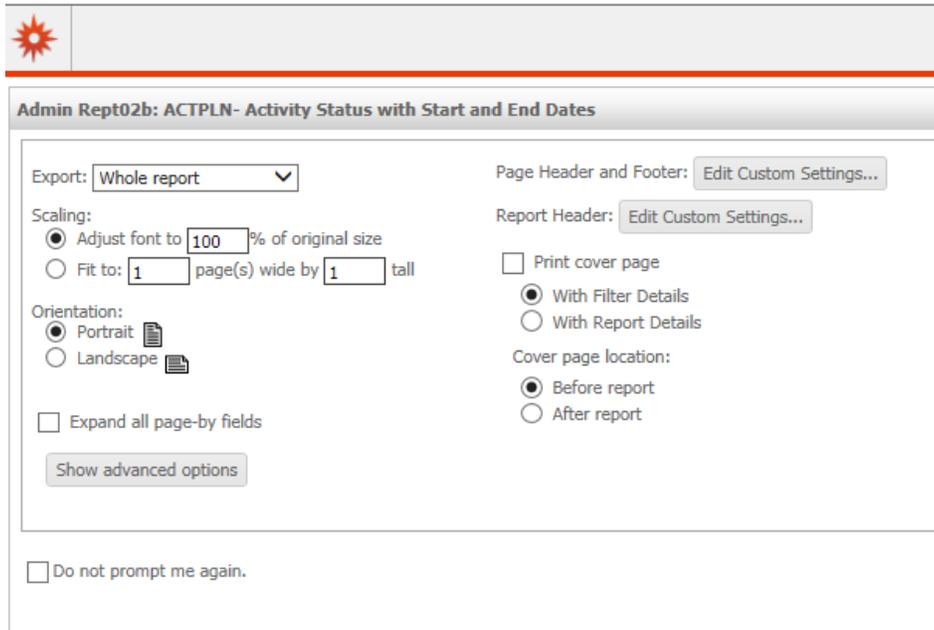
Export metric values as text  
 Export headers as text

**Excel with formatting options:**  
 Place each page on a separate sheet  
 Embed all images

Do not prompt me again.

Note: users can select the **Do not prompt me again** checkbox to save the settings entered and to utilize the settings each time a report is exported.

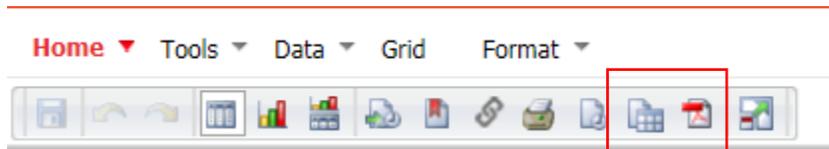
If users select a **PDF** version of the report, the system will let you set the page layout settings (and use the **Do not prompt me again** checkbox to save and use settings for future PDF downloads). However, you will not be able to modify the look and feel of the report further or re-sort the order of the data displayed.



The screenshot shows a settings dialog box titled "Admin Rept02b: ACTPLN- Activity Status with Start and End Dates". It contains several sections for configuring the report output:

- Export:** A dropdown menu set to "Whole report".
- Page Header and Footer:** A button labeled "Edit Custom Settings...".
- Report Header:** A button labeled "Edit Custom Settings...".
- Scaling:** Radio buttons for "Adjust font to 100% of original size" (selected) and "Fit to: 1 page(s) wide by 1 tall".
- Orientation:** Radio buttons for "Portrait" (selected) and "Landscape".
- Print cover page:** A checkbox (unchecked) with options "With Filter Details" (selected) and "With Report Details".
- Cover page location:** Radio buttons for "Before report" (selected) and "After report".
- Expand all page-by fields:** A checkbox (unchecked).
- Show advanced options:** A button.
- Do not prompt me again:** A checkbox (unchecked).

Once users run a report in Microstrategy, reports can still be **Exported** or downloaded as a **PDF** using the toolbar icons.



Source: Microstrategy Reports Version 9

Keywords: DRGR, export, modify reports, MS Excel, PDF, reports

## How can I get reports to run automatically? How do I subscribe to a report?

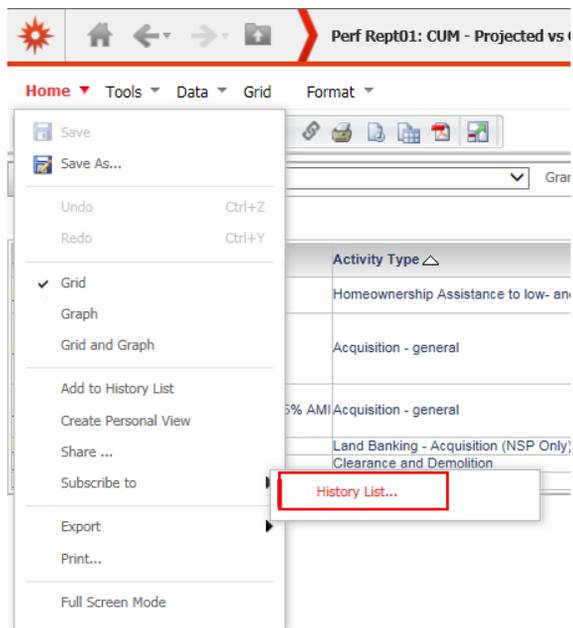
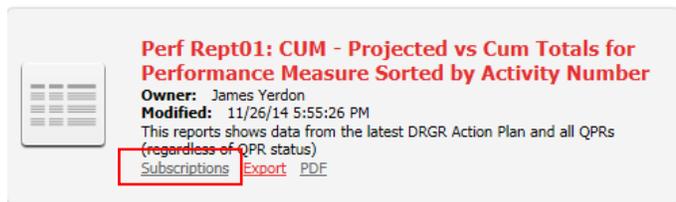
Updated: 2/26/2015

Subscribing to a report will allow you to get a copy of it updated at regular intervals (e.g.; every Monday, every 25th of the month). The report will not be e-mailed to you, but will instead be delivered to you within Microstrategy where you can retrieve them in your **History List**. There is a **90 day time limit** for reports saved on the DRGR server therefore, you should access and export saved reports regularly.

Users have three ways to generate reports automatically at scheduled intervals:

1. Users can select **Subscriptions** at the reports list prior to running the report, or
2. Use the **Home** menu to select **Subscribe to**, then **History List**, or
3. Use the **Subscribe** icon in the reports toolbar

All three options are shown below:



The **Subscribe** action will generate a pop-up window that lets you identify the schedule for the report production.

**Subscribe to History List** ? X

You have 0 subscriptions to this report.

**History List Subscription**

Name: Perf Rept01: CUM - Projected vs Cum Totals for Performance Measure Sorted by Activity Number 2/16/1

Report: Perf Rept01: CUM - Projected vs Cum Totals for Performance Measure Sorted by Activity Number

Schedule: A75 25th of the Month

To: C99410 MATTHEW DO

Run subscription immediately

**Advanced Options**

The new scheduled report will overwrite older versions of itself.

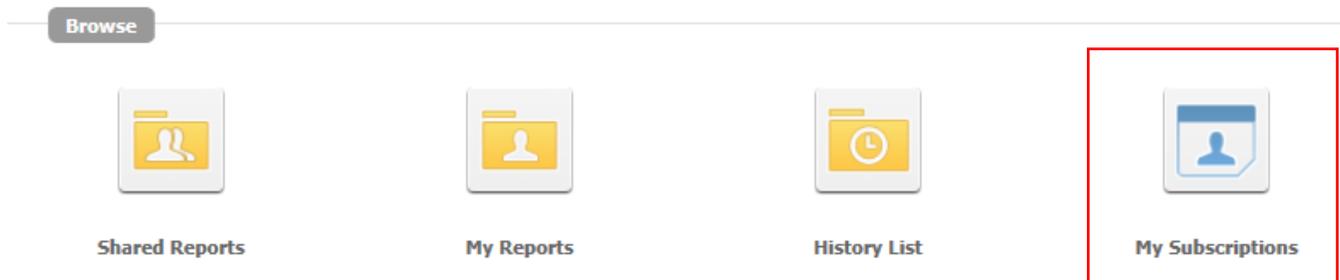
**Delivery**

Do not deliver after [ ] [ ]

OK Cancel

The pop-up window lets users specify a name, **Schedule** and includes **Advanced Options** for overwriting previous versions of the report or specifying an end date for the delivery.

A list of user **History List Subscriptions** is shown in the **My Subscriptions** on the Microstrategy home screen.



Source: Microstrategy Reports Version 9

Keywords: DRGR, history list, reports, run automatically, subscribe to reports, subscribing