MicroStrategy

Providing Intelligent Answers to Business Questions

Presented by Nette Johnson, Controller's Office   April 2016

Why MicroStrategy?

- MicroStrategy is the university's solution for current reporting & analysis tools that are becoming obsolete (EPM 11 & Web reports)

- MicroStrategy is a business intelligence (BI) tool which allows you to view and analyze volumes of complex data from multiple perspectives

- Gives you data-gathering super power (you can design your OWN reports)

- Makes the simple questions easier and quicker to answer and the complicated questions POSSIBLE to answer

- Your data is available anywhere you have access to the web!

- You can share reporting objects with other users without compromising data security

- You can combine many reports into one dashboard and multiple documents into a single location so all data is synchronized
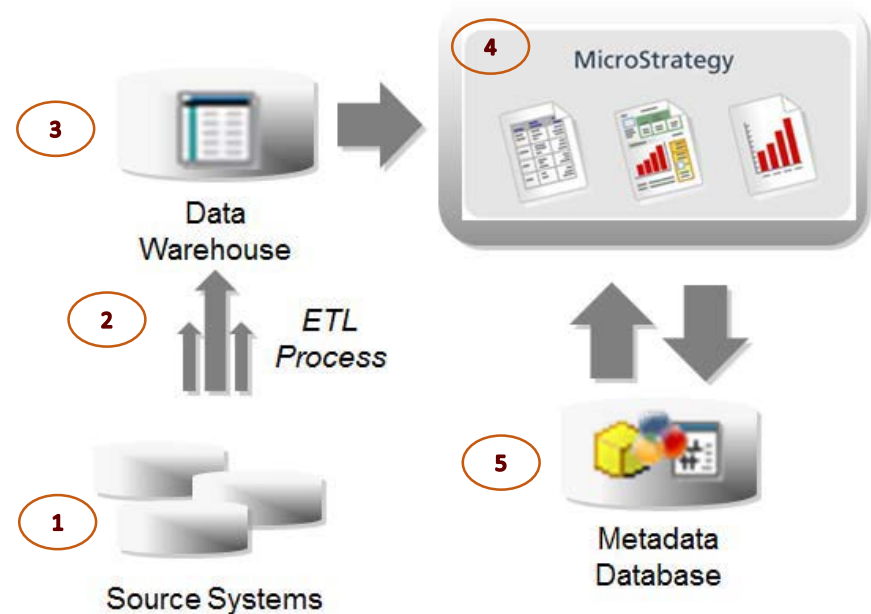
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Status of Implementation

- **SPOT** – fully implemented

- **Finance** – data is fully available for ad hoc reporting; canned "web reports" partially complete and more in development
    - Over 150 trained finance reporting analysts, contact Nette Johnson

- **HR** – employee/job/position data is available for ad hoc reporting; canned reports are being developed; in final testing for payroll model
    - About 40 trained HR reporting analysts, contact Christine Luketic

- **Undergraduate Programs** – just went live last weekend, open to users soon

- **Sponsored Programs** – very close to going live

- **Foundation** – very close to going live

- **Student** – hope to be live by Fall, no set date at this point

- ***Note***: you can start today with direct access to your own data sets, just contact Debbie Johnson to be set up

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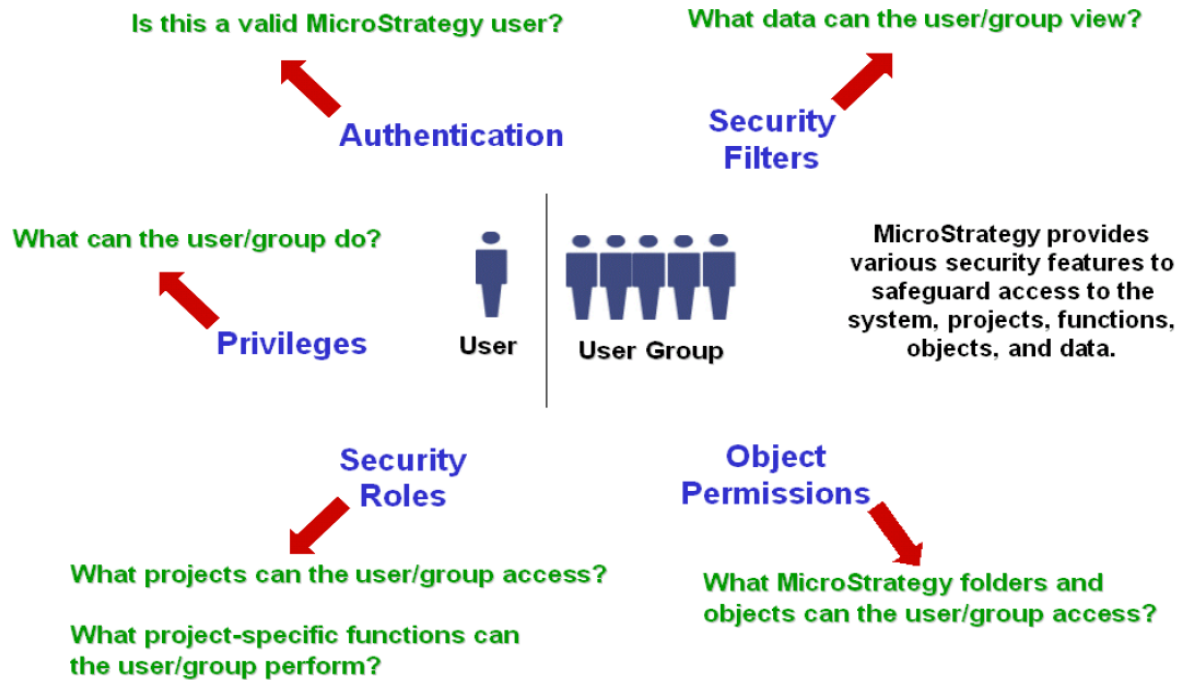
MicroStrategy BI Architecture

1. Databases, file sources, web sources, or main frames that store transaction processing data (R/W)

2. Extract, transform and load process facilitates transfer of data from source to data warehouse

3. Designed and optimized for analytical processing (R/O)

4. MSTR applications allow you to interact with the business intelligence system

5. Translates user requests into SQL queries and back into MSTR objects.

Data Security Layers

Security Functionality

Is this a valid MicroStrategy user?

Authentication

What data can the user/group view?

Security Filters

What can the user/group do?

Privileges

User

User Group

MicroStrategy provides various security features to safeguard access to the system, projects, functions, objects, and data.

Security Roles

What projects can the user/group access?

What project-specific functions can the user/group perform?

Object Permissions

What MicroStrategy folders and objects can the user/group access?

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Finance Reporting Roles and Permissions

- **Finance Reporting Consumer**
  - Automatically granted to VT employees who have Banner Finance access or are defined as financial manager (FTMFUND) or principal investigator (FRAGRNT)
  - Runs canned reports only from the Finance Reporting Menu

- **Finance Reporting Analyst**
  - All the same permissions as the Finance Reporting Consumer
  - Can also create ad hoc reports and save to a personal or shared folder
  - The Analyst role is granted by request only using the authorization form on the Controller's Office webpage (or attending the Reporting Basics training)

- **Finance Reporting Steward**
  - All the same permissions as Finance Reporting Analyst
  - Defines reports for the Finance Reporting Menu
  - Can also request that ad hoc reports be promoted to the shared folders
  - The Steward role is granted to authorized Accounting Operations employees and technical support staffs

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Demo

- **Web reports** – run, print, export to PDF, and subscribe to the new reports using the Finance Reporting Menu

- **Ad hoc reporting** – answering common business questions:

  Show me the ….

  1. Total operating expenses by account and department in 2015
  2. Current budget balance available for all direct expenses by fund
  3. Travel and supplies expenses for funds xxx last August
  4. Monthly activity by transaction type
  5. Last 4 years of labor costs
  6. Sponsored spending by Fund Source
  7. Sponsored funds ending in 60 days
  8. Sponsored fund overdrafts
  9. Department earned overhead by year

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Demo

- **OLAP manipulations** – dynamically viewing your data from different perspectives

    - Rearrange columns and rows

    - Hide or show new data objects

    - Add totals and/or subtotals (or averages, counts, etc)

    - Compute new values

    - Restrict your view of data (with filters)

    - Group data into pages

    - Zoom in on details or rollup to summary levels

- **Presentation Quality** – quickly converting reports into presentation quality documents

- **Dashboards** – provide high level information through visualizations

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