

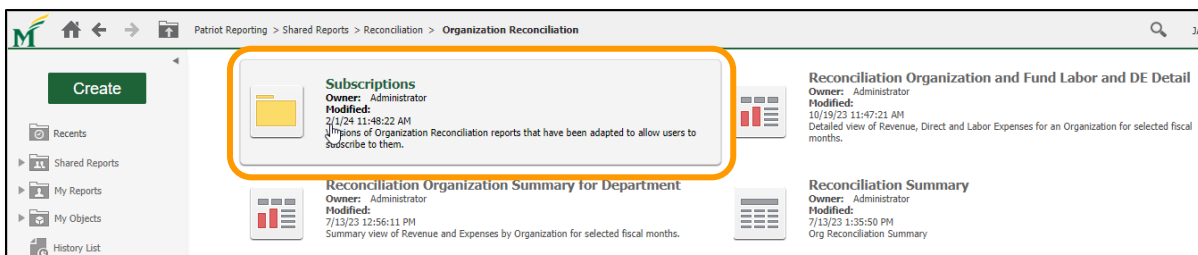
MicroStrategy Subscription Guide

Fiscal Services, in partnership with the Business Intelligence Services (BIS) team, has provided MicroStrategy users the opportunity to create subscriptions for the **Reconciliation Organization and Fund Labor and DE Detail Report**. The steps outlined in this quick guide will assist users with setting up subscriptions. However, subscribers and recipients must review the [Financial Management Manual](#) to ensure a solid foundation of the principles governing financial management at Mason and navigating MicroStrategy. Additional information and resources on reconciliation and financial management at Mason can be found on the **Reconciling at Mason** page of the Fiscal Services Website:

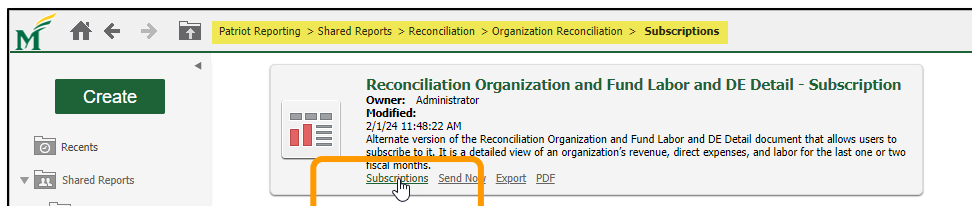
<https://fiscal.gmu.edu/controllers/reconciling/>. The information outlined in the aforementioned material will provide the framework necessary to understand the data provided in these reports.

Step-by-Step: Email Subscription

1. Navigate to the “Organization Reconciliation” reports using the instructions that can be found in the [Financial Management Manual](#)
2. Select the **Subscriptions** folder.

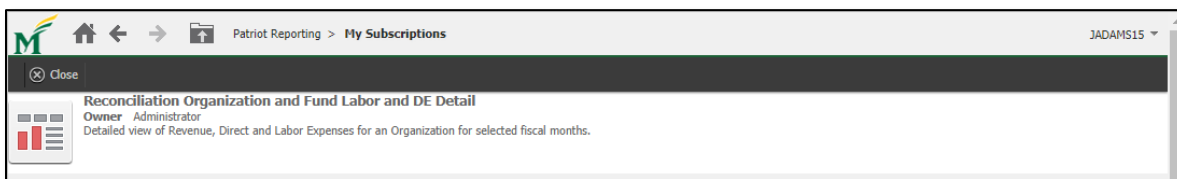


3. Hover your mouse cursor over, “Reconciliation Organization and Fund Labor and DE Detail” and several options

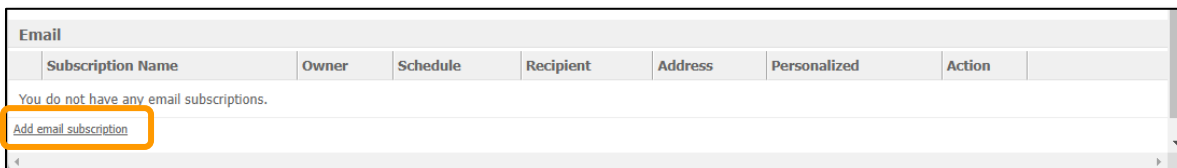


will appear below the document. Select **Subscriptions**.

4. On the “My Subscriptions” page –



... scroll down to “Email” ...

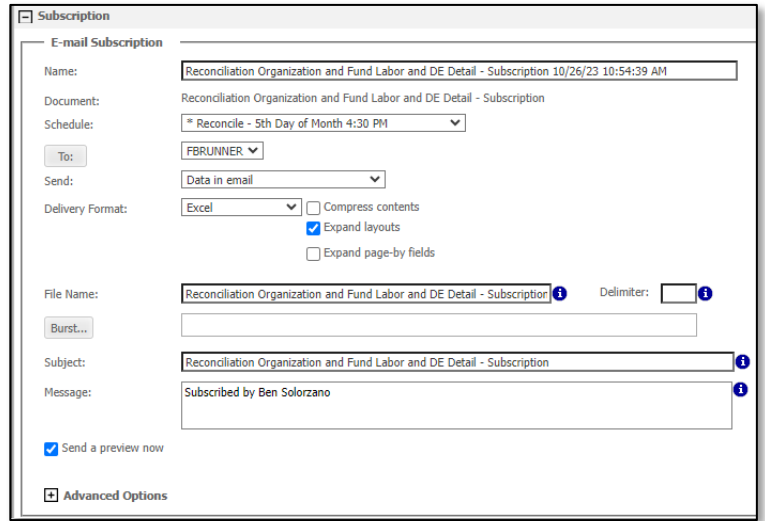


5. Select “Add email subscription”

For assistance with MicroStrategy subscriptions, please submit a support ticket to the Business Intelligence Services (BIS) Team using the following link: [MicroStrategy support ticket](#)

Create an "Email Subscription"

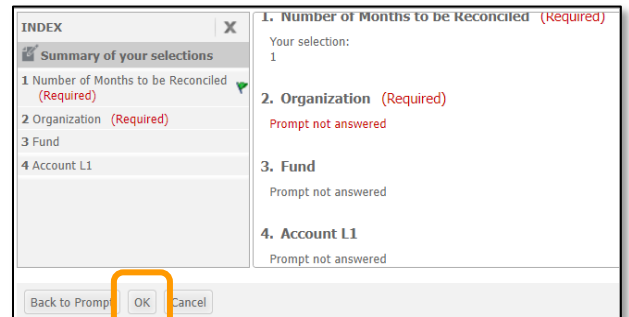
6. **Name:** We encourage users to customize to differentiate and fit the needs and purpose of this report. (i.e., Name, Purpose, Org, Fund, etc.)
7. **Schedule:** Choose from the options available in the drop-down menu.
 - For a monthly reconciliation, choose:
 - * Reconcile - 5th day of Month 4:30 PM
8. **To:** Should be populated with your personal Mason ID
9. **Send:** Select "Data in email"
10. **Delivery Format:** Select "Excel"
 - Check the "Expand layouts" option
11. **File Name:** Leave the default, or create your own
12. Leave the **Delimiter** and **Burst** fields empty
13. **Subject:** Leave the default, or create your own
14. **Message:** This will appear in the body of the email sent to all recipients of this subscription. The message is limited to **no more than 1,500 characters**.



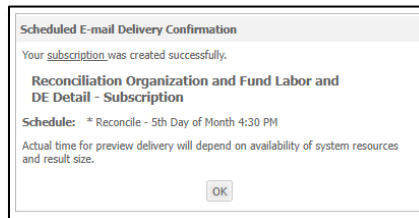
Pro Tips:

- o Edit and save your text in a Word document to save and copy for future subscriptions.
- o **"Send a Preview Now:"** Check this box to receive an immediate preview of your message.

15. **INDEX:** The following prompts will set the parameters for the subscribed report.
 - **Number of Months to be Reconciled (Required):**
 Enter "1", to run the report for the previous month only.
 Enter "2" to include the previous two months.
 - **Organization (Required):** enter the appropriate Org(s) for this subscription.
 - **Fund and Account L1:** May be filled out as appropriate, not required.
 - Once Complete click the **"OK"** button




16. The **Scheduled E-mail Delivery Confirmation** box will appear



Modifying subscriptions and report parameters

17. Following steps 1 – 4 of the "Step-by-Step: Email Subscription" section of this guide
18. Click the **"Personalization"** Icon to open the **"INDEX:"** section

Subscription Name	Owner	Schedule	Recipient	Address	Personalized	Action	Unsubscribe
Reconciliation Organization and Fund Labor and DE Detail - Subscription 2/5/24 5:48:30 PM	JADAMS15	8:30 PM, 4th Day of Month	JADAMS15	JADAMS15	<input checked="" type="checkbox"/>	 Personalize	<input type="checkbox"/>

Personalization

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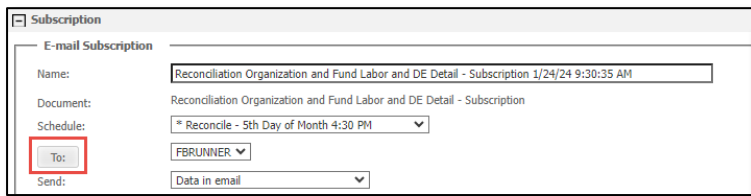
19. Modify the parameters for the subscription as appropriate (see step 15 for more info).
20. Once Complete click the “OK” button
21. The **Scheduled E-mail Delivery Confirmation** box will appear

Can I add additional recipients to my subscriptions?

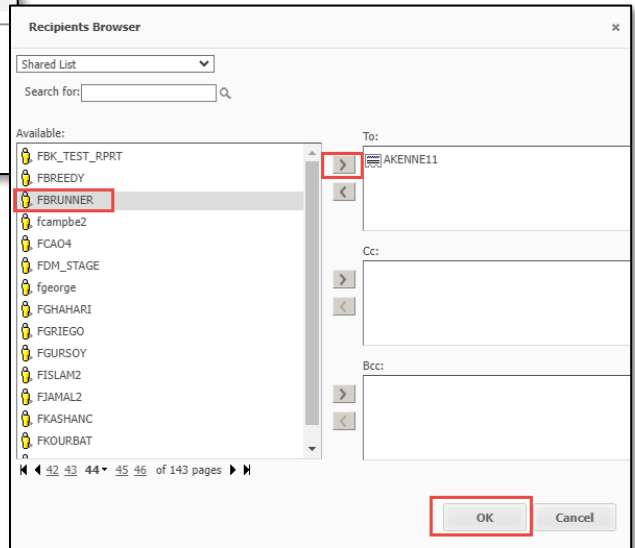
- Yes! **To request access please submit a support ticket to the BIS Team using the following link: [MicroStrategy support ticket](#).** Access to this feature is not available to all and will only be granted on a case-by-case basis.
- **Recipients must have access to MicroStrategy and the subscribed report.**
- All recipients must have a solid foundation of the principles governing reconciliation and financial management at Mason, the context of the report being received, and a basic understanding of MicroStrategy. Additional information and resources on reconciliation and finance management can be found on this *Reconciling at Mason* page of the Fiscal Services Website: <https://fiscal.gmu.edu/controllers/reconciling/>.
- **Communicate with potential recipients before creating or adding to subscriptions.**
 - When adding additional recipients to a subscription it is very important that the **Message** field includes a signature and explanation of the purpose of the subscription and the attached report, this will provide a point of contact for any questions, and context which can help reduce potential confusion.

Add or remove Recipients

1. Click the “To” button in the “Email Subscription” box

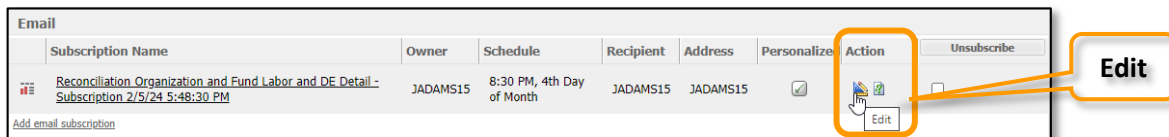


2. The “Recipients Browser” window will pop up
3. **Available:** select recipients from the list of available users.
4. Select the appropriate recipient(s) and hit the “>” button to add them to the “To:”, “Cc” or “Bcc” field.
5. Click the OK button.



Modifying recipients

6. Users can Add or Remove recipients from existing subscriptions by clicking the “Edit” icon under the “Action” column



7. Repeat Steps 1 – 5 of the “Add or remove Recipients” section of this guide.
8. Once Complete click the “OK” button
9. The **Scheduled E-mail Delivery Confirmation** box will appear

Additional information on MicroStrategy subscription management can be found in the BIS Knowledge-Base subscription articles found, here: <https://its.gmu.edu/article-categories/university-applications/microstrategy/saving-and-subscribing-to-reports-in-microstrategy/>

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