

BLUEcloud Analytics 2016.04

User Levels Guide

April 2016



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04/2016

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About this guide

This guide explains the different user levels available to BLUEcloud Analytics users. Each user level has corresponding privileges that allow the user to perform certain functions in MicroStrategy. This guide is intended for library administrators who need to decide which user levels to request for each of their staff members who will be using BLUEcloud Analytics.

Documentation updates

Updates to this guide are posted to the customer support website between releases, as necessary. These updates provide corrections to unclear, incorrect, or incomplete information. They also provide documentation for enhancements that were not complete at the time the guide was first published.

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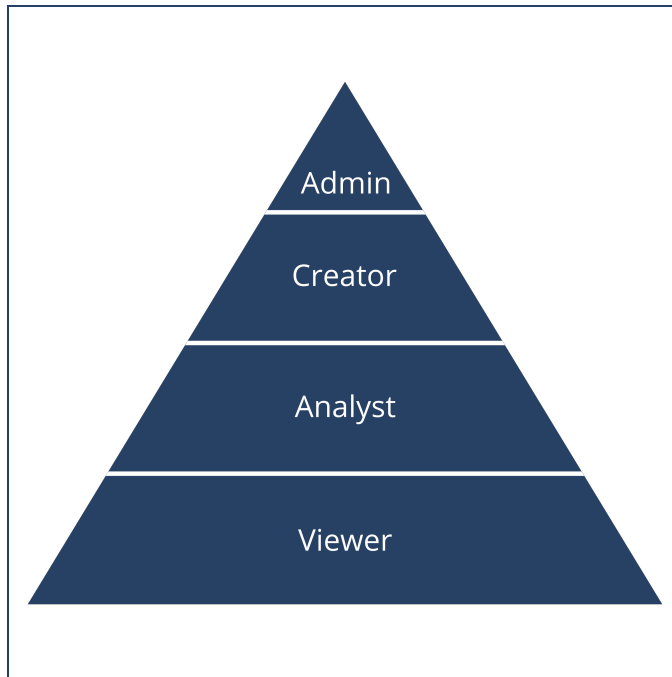
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Introduction to user levels

BLUEcloud Analytics users are divided into four levels. The pyramid below illustrates the four user levels at a glance:



Each user level has privileges that allow them to use different features in MicroStrategy. Higher level users can perform all of the functions of lower level users. The following bullet points provide an overview of each user level:

- Admin
 - Can view reports, create dashboards, and create and save reports to any directory under their project using the Report Builder, Report Designer, or the Report Wizard, in addition to all Creator functions.
 - Limited to 15 users, including Creator users.
- Creator
 - Can view reports, create dashboards, and create and save reports to My Reports using the Report Builder, Report Designer, or the Report Wizard, in addition to all Analyst functions.
 - Limited to 15 users, including Admin users.
- Analyst
 - Can view normal reports, create dashboards, and create reports using the Report Builder and Report Wizard tools, in addition to all Viewer functions.
 - Unlimited number of users allowed.
- Viewer

Introduction to user levels

- Can only view normal reports, has no creation privileges.
Unlimited number of users allowed.



Privileges

This section of the guide details the privileges that are granted to each user level. The privileges that are granted to all user levels are covered first, followed by the privileges granted exclusively to each user level. Privileges that are granted to lower level users are included in higher user levels by default.

See the following topics for more information about a specific user level's privileges:

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Privileges granted to all user levels

The privileges that are granted to all user levels are divided into common privileges and deliveries privileges. Both sets of privileges are detailed in the tables below. Each table shows a summarized name of the privilege from MicroStrategy, with details about the functions that the privilege allows the user to perform.

Common privileges

Privilege	Allows the user to...
Drill within Intelligent Cube	Drill within an Intelligent Cube, so no SQL is executed. A user who has this privilege and executes a drill that can be resolved through OLAP Services does not generate and execute SQL against the warehouse. Note: This privilege is required for drilling in MicroStrategy Web in Flash Mode.
Use Dynamic Sourcing	Execute reports that use Dynamic Sourcing
Use OLAP Services	Create and execute reports and documents that use OLAP Services features
Web execute document	Browse and execute Report Services documents from any XML API client, such as MicroStrategy Web or MicroStrategy Mobile

Privilege	Allows the user to...
Web run dashboard	Execute a Visual Insight quick dashboard
Execute transaction	Edit the grids and fields in a Transaction Services report and submit the changed results to the report
Add notes	Add notes to a report or document
Create application objects	Create application objects Note: The appropriate editor privileges listed for Developer privileges are also required.
Create new folder	Create and delete new folders
Create schema objects	Create schema objects
Create shortcut	Create and delete shortcuts to objects
Edit notes	Edit an existing note in a report or document
Export to Excel	Export a report or document to a Microsoft Excel spreadsheet
Export to flash	Export a report or document to a MacroMedia Flash presentation
Export to HTML	Export a report or document to HTML
Export to PDF	Export a report or document to a PDF document
Export to text	Export a report or document to plain text
Save personal prompt answer	Save personalized answers to prompts
Schedule request	Schedule a report or document for later delivery
Use server cache	Use the caches on Intelligence Server

Privilege	Allows the user to...
Use Translation editor	Use the Translation editor. User must have Write access to translate an object.
View History List	View the History List from any XML API client, such as MicroStrategy Web or MicroStrategy Mobile
View notes	View notes that have been added to a report or document

The information in this table is derived from the *Supplemental Reference for System Administration Guide* available on the MicroStrategy website here:

<http://www2.microstrategy.com/producthelp/AnalyticsEnterprise/manuals/en/AdminSupplemental.pdf>

Deliveries privileges

Privilege	Allows the user to...
Configure contacts data security profile (server level only)	Link and unlink a contact to a user
Create and edit transmitters and devices (server level only)	Use the Transmitter Editor and Device Editor
Create dynamic address list	Create new dynamic address lists for subscriptions
Create email address	Create new email addresses for subscriptions
Create file location	Create new file locations for subscriptions
Create print location	Create new printer locations for subscriptions
Subscribe dynamic address list	Subscribe a dynamic address list to a report or document
Subscribe to email	Create an email subscription
Subscribe to file	Create a file subscription
Subscribe to print	Create a print subscription
Use Distribution Services	Receive email, file, and print subscriptions

Use link to History List in email	Receive an email subscription with a link to a History List, and use the Data And Link To History List and Link To History List options when creating an email subscription
Use Send A Preview Now	Send a preview for email, file, print, and bulk export subscriptions
Use Send Now	Send email, file, print, and bulk export subscriptions immediately

The information in this table is derived from the *Supplemental Reference for System Administration Guide* available on the MicroStrategy website here:

<http://www2.microstrategy.com/producthelp/AnalyticsEnterprise/manuals/en/AdminSupplemental.pdf>

Viewer privileges

A Viewer is the most basic user level available in BLUEcloud Analytics. Users at this level can view normal reports but do not have the ability to create dashboards or reports.

Viewers are granted all common and deliveries privileges (for more information, see [Privileges granted to all user levels on page 3](#)). In addition to common and deliveries privileges, Viewers are also granted the following privileges:

Privilege	Allows the user to...
Web change user preferences	Change some characteristics of page appearance and report results
Web change view mode	Toggle between grid, graph, and grid & graph, to hide or show predefined totals, and to reset reports
Web configure toolbars	Use, show, and hide toolbars
Web drill and link	Use links to view related data not shown in the original report results
Web export	Export report results
Web object search	Search for reports, documents, folders, filters, or templates
Web print mode	Display a printable version of a report or document

Privilege	Allows the user to...
Web re-execute report against warehouse	Re-execute a report, hitting the warehouse rather than the server cache. If Intelligence Server caching is turned off and this is not granted, the re-execute button is removed.
Web simultaneous execution	Open multiple MicroStrategy Web sessions
Web sort	Sort report data by clicking on sort icons in column headings
Web subscribe to History list	Subscribe to periodic execution of reports and view their results via the History List Note: A user with this privilege is also considered to have the Schedule Request privilege in Common Privileges.
Web switch page-by elements	Switch page-by elements for objects in the Page axis
Web use locked headers	Use the Lock Grid Headers feature
Web user	Connect to MicroStrategy using the Web interface Note: If a user does not have this privilege for a project, that project is not shown in Web. If a user does not have this privilege for any projects available on the Web server, Web returns an error message stating that "no projects are available for this project source."

The information in this table is derived from the *Supplemental Reference for System Administration Guide* available on the MicroStrategy website here:

<http://www2.microstrategy.com/producthelp/AnalyticsEnterprise/manuals/en/AdminSupplemental.pdf>

Analyst privileges

An Analyst is the second user level available within BLUEcloud Analytics. Users at this level can view normal reports, create dashboards, and create reports using the Report Builder and Report Wizard tools.

Analysts inherit all of the privileges granted to Viewers (for more information, see [Viewer privileges on page 6](#)). In addition to the privileges inherited from Viewers, Analysts are granted the following privileges:

Privilege	Allows the user to...
Web add/remove units to/from grid in document in View Mode	Add units to or remove units from an existing grid report in a Report Services document when in Express Mode
Web create derived metrics	Create new calculations based on other metrics already on a base report
Web define derived elements	Create derived elements in a report or document
Web import data	Use the Data Import feature to import data from files. Note: Granting this privilege also grants Create Application Objects, Create Schema Objects, Use OLAP Services, and Web Publish Intelligent Cube. Revoking any of these privileges also revokes Web Import Data.
Web import from database	Use the Data Import feature to import data from databases (requires Web Import Data as well)
Web number formatting	Change number formatting on all metrics on grids. A user with this privilege has access to the following formatting options: <ul style="list-style-type: none"> • From the Format menu, the Advanced Formatting option • The Advanced Formatting context menu (all options) • On the Format toolbar, the Area (metrics only), Type, and number style options Note: If this privilege is assigned, the Use OLAP Services privilege (in the Common privileges group) is automatically assigned as well.
Web publish Intelligent Cube	Publish an Intelligent Cube to Intelligence Server
Web use Report Objects window	Use the Report Objects panel
Web use View filter editor	Add or modify the view filter for a report
Web create dashboard	Create a new quick dashboard
Web edit dashboard	Open a quick dashboard in Visual Insight mode.
Web save dashboard	Save a quick dashboard from Visual Insight, Flash, or Express mode

Privilege	Allows the user to...
Web create alert	Create a conditional subscription based on a threshold
Web subscribe to Bulk Export	Create a bulk export subscription
Web add to History List	Add reports or documents to the History List (requires Web simultaneous execution privilege)
Web advanced drilling	Access advanced drill mode through the More Options link on the report results page
Web alias objects	Rename an object on a report
Web choose attribute form display	Use the Attribute Forms dialog box, see attribute forms in the Report Objects list, see the Attribute Forms context menu options, and pivot attribute forms
Web create new report	Access the Create Report folder and design reports, and run new reports from the folder where he or she has saved the report definition
Web drill on metrics	Drill on metrics
Web edit notes	Add and edit notes that have been added to a report or document
Web execute data mart report	Execute data mart reports
Web filter on selections	Filter on selected data. Note: This privilege is also required for the Keep Only and Execute actions in Flash Mode.
Web manage objects	Delete folders, reports, and documents
Web modify Subtotals	Add, modify or delete subtotals on a Web report
Web pivot report	Move rows and columns up or down and left or right, to pivot from rows to columns and vice versa, and to move metrics, attributes, custom groups, and consolidations to the Page axis
Web report details	Access report and document information by clicking the Report details link on the report, History List, or Wait page
Web report SQL	View the SQL code for the report

Privilege	Allows the user to...
Web save to My Reports	Save reports and documents to My Reports folder
Web save to Shared Reports	Save reports and documents to the Shared Reports folder
Web simple graph formatting	<p>Perform simple graph formatting changes.</p> <p>A user with this privilege has access to the following formatting options:</p> <ul style="list-style-type: none"> • From the Format menu, all options under the Graph menu item • The Format context menu (all options) • The Graph toolbar (all options) • In the Format toolbar, the Advanced Graph Formatting option • In the Format: Graph dialog box, all options in the General tab and the Legend and Series Labels in the Format tab
Web use Object Sharing Editor	Use the Object Sharing Editor to set ACLs for objects
Web use Visual Threshold Editor	Use the Visual Threshold Editor

The information in this table is derived from the *Supplemental Reference for System Administration Guide* available on the MicroStrategy website here: <http://www2.microstrategy.com/producthelp/AnalyticsEnterprise/manuals/en/AdminSupplemental.pdf>

Creator privileges

A Creator is the third user level available within BLUEcloud Analytics. Users at this level can view reports, create dashboards, and create and save reports to My Reports using the Report Builder, Report Designer, or the Report Wizard.

Creators inherit all of the privileges granted to Analysts (for more information, see [Analyst privileges on page 7](#)). In addition to the privileges inherited from Analysts, Creators are granted the following privileges:

Privilege	Allows the user to...
Web define Intelligent Cube report	Create a report that uses an Intelligent Cube as a data source

Privilege	Allows the user to...
Web save derived elements	Save stand-alone derived elements, separate from the report
Web create HTML container	Create HTML container objects in a document
Web document design	Create a document page, access Design Mode for documents, and perform WYSIWYG editing of documents in Express Mode Note: This privilege is required to define conditional formatting.
Web manage document datasets	Add datasets to and remove datasets from a Report Services document Note: User must have Web document design privilege as well.
Web configure transaction	Associate objects in a grid with a Transaction Services report
Web define advanced report options	Set the available and default Run and Export modes for a report
Web define MDX cube report	Define a new report that accesses an MDX cube, and see the MDX Cube option in the Create Report dialog box
Web edit drilling and links	Use the Link Editor
Web format grid and graph	Change the formats of grid and graph reports using the Formatting and Graph toolbars and the Formatting Panels. In MicroStrategy Report Services, modify widget properties. Note: This privilege also includes all functionality available in the Web Number Formatting and Web Simple Graph Formatting privileges (in the Web Designer privilege group).

Privilege	Allows the user to...
Web modify the list of report objects (use Object Browser - all objects)	Use the Object Browser when viewing a report in View or Design Mode. This determines whether the user is a report designer or a report creator. A report designer is a user who can build new reports based on any object in the project. A report creator can work only within the parameters of a pre-designed report that has been set up by a report designer. For more information on this, see the Advanced Reporting Guide.
Web save templates and filters	Save templates and filters
Web set column widths	Modify the column widths and row height for a grid report
Web subscribe others	View available addresses for all users, and add other MicroStrategy users to a report or document subscription
Web use advanced threshold editor	Use the Advanced Threshold Editor
Web use custom group editor	Create or edit custom groups using the Custom Group Editor in Web
Web use design mode	Modify the report using Design Mode
Web use filter editor	Add or modify the report filter for a report

Privilege	Allows the user to...
Web use metric editor	Use the Metric Editor to create or modify metrics
Web use prompt editor	Use the Prompt Editor, and create or modify prompts

The information in this table is derived from the *Supplemental Reference for System Administration Guide* available on the MicroStrategy website here:

<http://www2.microstrategy.com/producthelp/AnalyticsEnterprise/manuals/en/AdminSupplemental.pdf>

Admin privileges

An Admin is the fourth user level available within BLUEcloud Analytics. Users at this level can view reports, create dashboards, and create and save reports to any directory under their project using the Report Builder, Report Designer, or the Report Wizard.

Admins inherit all of the privileges granted to Creators (for more information, see [Creator privileges on page 10](#)). In addition to the privileges inherited from Creators, Admins are allowed to access all other users' folders.