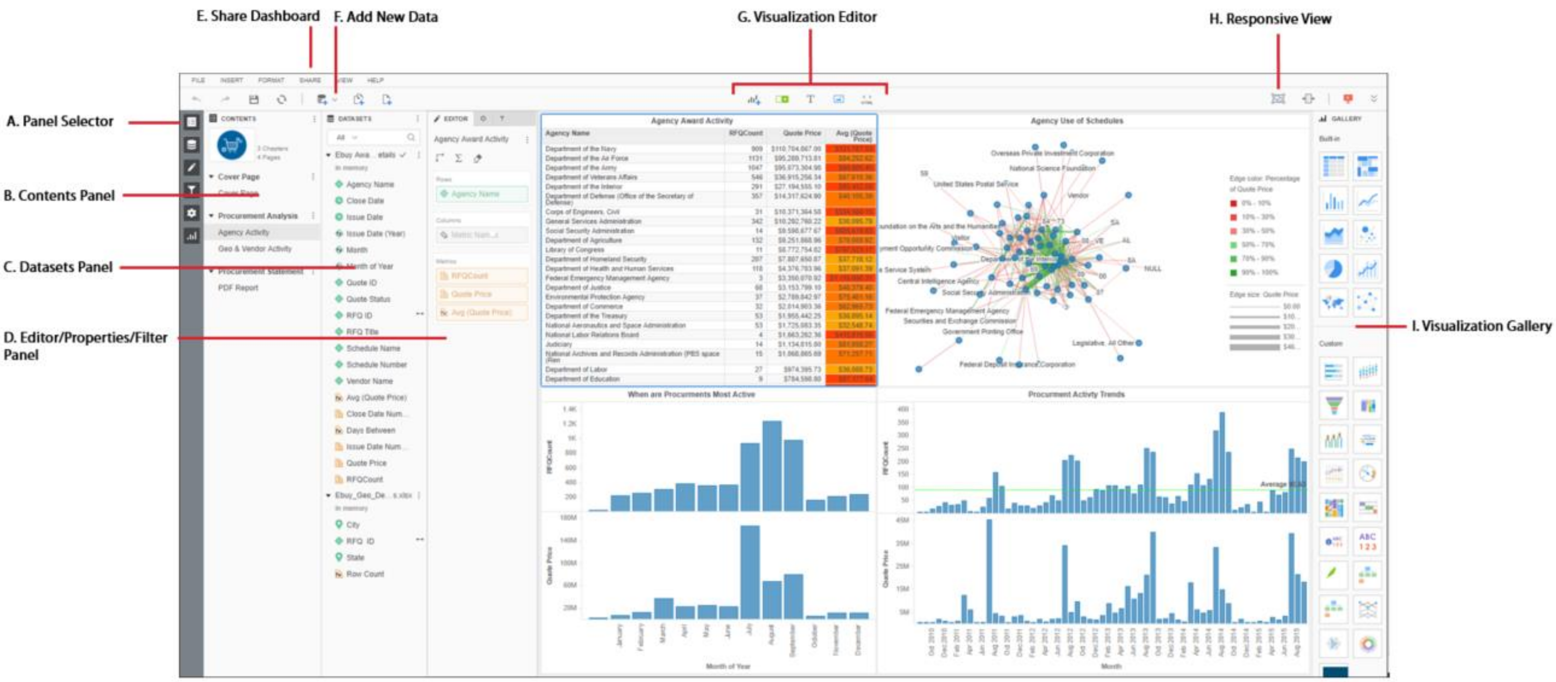
D2D Beginner MicroStrategy Training

Self-Service Dashboard Creation

CREATE I ENGAGE I LEARN

The MicroStrategy User Interface



A.	**Panel Selector:**	**Choose which panels you want to view**
B.	**Contents Panel:**	Table of Contents listing the **Chapters** and **Pages** of the MicroStrategy **Dossier**
C.	**Datasets Panel:**	List of **Attributes** and **Metrics** from your imported dataset that can be used to build visualizations
D.	**Editor/Properties/Filter Panel:**	a. Editor Panel – Drag and Drop data objects to build visualization b. Properties Panel – Edit the look and feel of the visualization c. Filter Panel – Add dataset objects to use as filters for your visualizations
E.	**Share Dashboard:**	give access to users who can view your dashboard, send them a link, or email your creation
F.	**Add New Data:**	Select to bring in new data from various data sources or existing dataset objects
G.	**Visualization Editor:**	Select to add a new visualization, filter, text, image, or HTML container
H.	**Responsive View:**	Edit how your dossier will look when viewed on different devices
I.	**Visualization Gallery:**	Select which visualization you would like to use on your dashboard

Important MicroStrategy Terminology

MicroStrategy Developer - a simple, but expansive tool geared towards MicroStrategy Administrators and MicroStrategy Developers. This tool provides extensive options and features to administer, create, and deploy solutions for any enterprise.

MicroStrategy Web - Design, navigation, settings, and administration in the MicroStrategy Web client interface, including Web authentication (Windows, Kerberos, LDAP, NT, Standard, Trusted) and web server configuration.

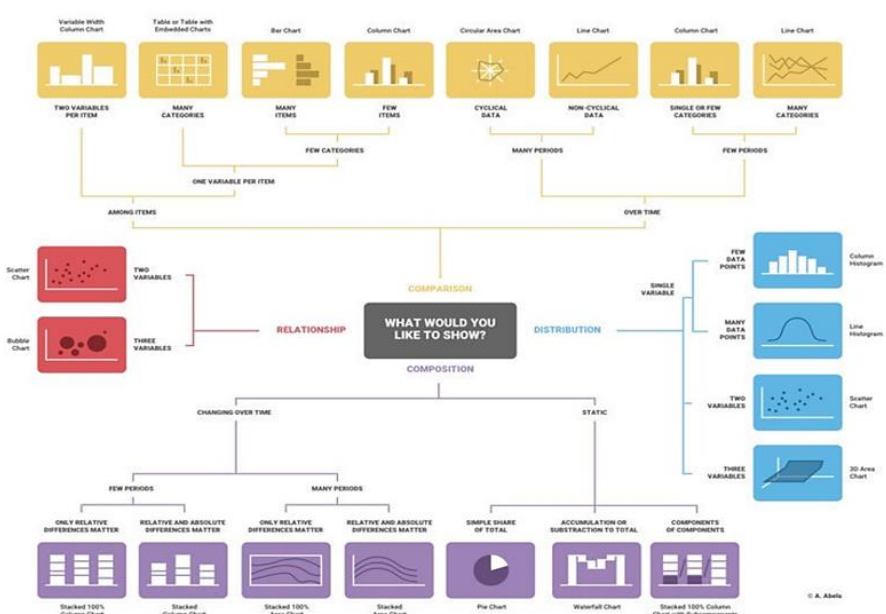
MicroStrategy Library - a personalized portal for every end user to access all their dossiers and report services documents. BI authors can easily share a link to dossiers or documents, which is hosted in the MicroStrategy Library.

Collaboration - consumers can now interact with each other via discussion threads or comments that can be made within a dossier or a document.

MicroStrategy Desktop - a fast, user-friendly desktop tool that lets you intuitively access and explore data to create visualizations in minutes on your PC or Mac. Easily access, explore, and analyze data in just a few clicks with self-service analytics. Experience the speed and flexibility of data discovery without sacrificing the scalability and security of an enterprise analytics environment.

MicroStrategy Workstation - our unified product built to radically simplify enterprise analytics by bringing all key workflows into a single user experience. This will allow enterprise BI developers and administrators to build and administer sophisticated enterprise and mobile analytics applications with a fraction of the effort it has traditionally taken.

What Visualization Should I Use?



Exercise 1: Data Import and Dashboard Creation

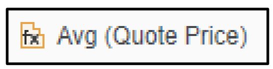
MicroStrategy Dashboard #1

Adding to your dataset

1. From the dataset panel, select the ellipse next to **Datasets** -> **Add Data** -> **New Data**
2. Similar to the previous exercise; Select **File from Disk** and open the second file name titled: **Ebuy_Details**
3. Select **Prepare Data**
4. Find the **RFQCount** in the attribute section of the data table; Place it from the Attributes section to the Metrics section.
5. Select **Finish**

Grid Visualization

1. Place the Agency Name attribute onto the visualization section
2. Place the RFQCount and Quote Price metrics onto the **Metrics** section of the editor pane
3. **Creating a Derived Metric**
   - Right-click the Quote Price metric
   - Hover over **Aggregate By** in the pop-up menu and select **Average**
   - Notice now a new metric as appeared in the dataset pane

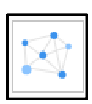


4. Place the newly created Avg (Quote Price) metric under the other metrics in the editor pane
5. **Creating Thresholds for a metric**
   - Right-click the Avg (Quote Price) metric and select **Thresholds…** from the menu
   - Once you have selected a color your prefer; select **OK**
6. Hover over the Quote Price column header within the visualization and select the drop-down arrow
7. Select **Sort Descending** from the pop-up menu
8. Double-click the title of the visualization (**Visualization 1**) and change the title to **Agency Award Activity**

Network Visualization

1. Select the **Visualization** button at the top of the interface

2. Select the **Network Visualization** from the visualization pane on the right of the interface



3. Place the Agency Name attribute in the **From Item** section on the editor pane
4. Place the Schedule Number attribute in the **To Item** section

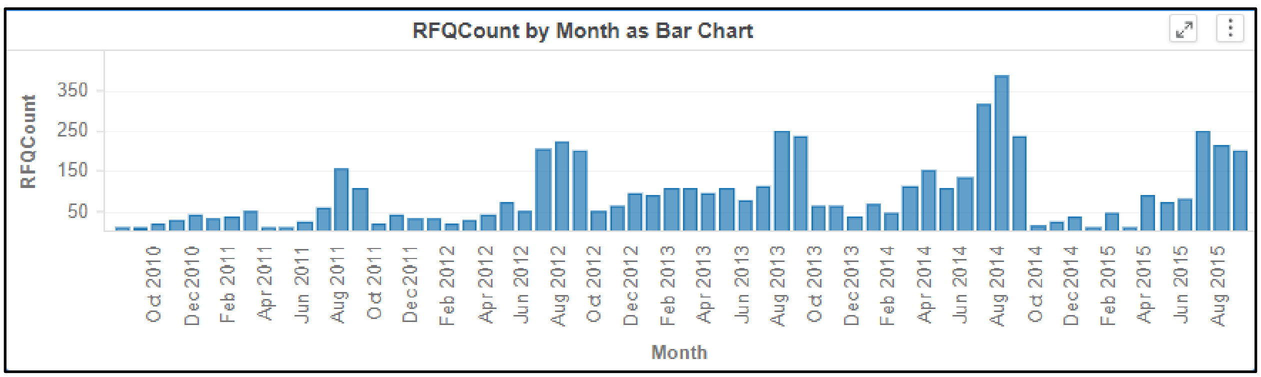
5. Place the Quote Price metric in the **Edge Color** section
6. Place the Avg (Quote Price) metric in the **Edge Size** section
7. Place the RFQCount metric in the **Item Size** section
8. Double-click the title of the visualization (**Visualization 2**) and change the title to **Agency Use of Schedules**

Save the Dossier

1. Select the File Menu and select **Save As**
2. Save the dossier within My Reports under the file name **(Your Last Name)_(Today's Date)**

Bar Chart Visualization from Natural Language Processing

1. **Creating a Derived Time Attribute**
   - Right Click the Issue Date Attribute
   - Hover over **Create Time Attributes** in the pop-up menu; select **Month, Month of Year, and Year**; and select **OK**
   - Notice there are now three new attributes under the Issue Date attribute for each of the designated time periods you selected
   - Rename the Issue Date (Month) attribute to **Month**
2. Press **Control, Alt, and /** at the same time to bring up the NLP interface
3. Within the box in the center of the screen, type **RFQCount by Month as Bar Chart**
4. A new visualization should have been created that looks like the image below:



5. Drag the new visualization under the Grid and Network visualizations that we created earlier
6. Place the Quote Price metric under the RFQCount metric in the vertical section of the Editor Panel
7. **Adding a Reference Line to the Bar Chart**
   - Switch to the Format Panel by selecting the **cog symbol** next to the word Editor
   - Change the Data Exploration option to **Reference Lines**
   - Make sure the RFQCount metric is selected and select **Add**
   - Select **Average** from the pop-up menu
   - Change the line color to **Green** so that it can be seen more clearly on the visualization
8. Double-click the title of the visualization and change it to **Procurement Activity Trend**

Bar Chart Visualization from Duplication

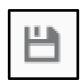
1. Select the **ellipse** in the top right corner of the **Procurement Activity Trend** visualization
2. Select **Duplicate** from the pop-up menu

3. Drag the new visualization to the right of the **Procurement Activity Trend** visualization and re-name it **When are Procurements Most Active**
4. Reduce the size of the **When are Procurements Most Active** so the **Procurement Activity Trends** visualization takes up more room on the dashboard
5. Remove the Month Attribute from the editor pane and replace it with the Issue Date (Month of Year) attribute you created earlier

Using a Visualization to Filter Other Visualizations

1. Select the **ellipse** in the top right corner of the **Agency Award Activity** visualization
2. Choose **Select Targets** from the pop-up menu
3. Select each of the visualizations so they each have the Target banner in the corner like this:

4. Select **Apply**
5. Now when you select the specific agency from the grid, the other visualization will change accordingly
6. Save the dashboard by clicking the save icon



7. Your finished dashboard should now resemble the image below: