

Completing the following steps helps you and other users in your organization get the most value from your data during the trial period. A little bit of time configuring ThoughtSpot has a big impact.

Before you start, review these talks to identify your ideal use case. The context helps you make account-related decisions and use ThoughtSpot effectively.

### ThoughtSpot Success Series

Defining a ThoughtSpot Use Case

[Watch video→](#)

### ThoughtSpot Success Series

Use Case Prioritization

[Watch video→](#)

We highly recommend that you register for the free ThoughtSpot U course that covers the material in this section, [Getting Started with ThoughtSpot Analytics Cloud](#).

## Step 1: Create a ThoughtSpot Community account

A ThoughtSpot Community account lets you ask questions in our product forums, explore best practices from other customers, sign up for events, and contact support.

[Create a Community account →](#)

## Step 2: Activate your ThoughtSpot Cloud account

We will send you an email that contains the administrator credentials to log in for the first time. Check your inbox, then click to access the free trial cluster. Stay logged in to complete the rest of the setup.

When you start using the ThoughtSpot Free Trial, you see the ThoughtSpot password verification checklist. Passwords must meet the following requirements:

8 or more characters.

1 uppercase letter, 1 lowercase letter, 1 number, and 1 special character.

No blocked words: username, display name, ....

Pass a complexity and uniqueness test by checking for known patterns and words. ThoughtSpot rejects passwords that are not complex enough.

For more information, see the [Dropbox password library](#).

## Step 3: Connect to your data source

Completing this step lets all users in your organization perform live queries. Choose your cloud data warehouse type, and follow the connection instructions.

[Amazon Redshift →](#)

[Azure Synapse →](#)

[Databricks →](#)

[Dremio →](#)

[Google BigQuery →](#)

[Oracle ADW →](#)

[Snowflake →](#)

[Starburst →](#)

[Teradata →](#)

[Upload flat data file \(CSV\) →](#)



## Step 4: Model your data for searches

ThoughtSpot automatically optimizes your data for search. It models and configures most details. However, we recommend that you adjust the modeling settings to align with your identified use cases, and improve the experience for other users.

[Data modeling →](#)

[Join tables →](#)

## Step 5: Create a worksheet

Worksheets make it easier for everyone in your organization to search data and create visualizations. Use the following step-by-step instructions to create your first worksheet.

[Create and use worksheets →](#)

## Step 6: Learn search essentials

After you finish creating worksheets, you are ready to search. Review the key concepts to get started, and how to help others in your organization become effective searchers.

[Search overview →](#)

[Understanding charts →](#)

[Keywords reference →](#)

[Understanding formulas in searches →](#)

## Step 7: Make a default Liveboard

Liveboards are interactive collections of charts and tables. Set up a shared Liveboard now, so everyone who joins your organization can access valuable information.

[Basic Liveboard usage →](#)

## Keep learning

[ThoughtSpot Cloud documentation →](#)

[ThoughtSpot Cloud training →](#)

[Thoughtspot Success Series →](#)

[ThoughtSpot Support Handbook → \(PDF\)](#)

## Get connected

[Visit YouTube channel →](#)

[Schedule office hours →](#)

[Join upcoming events →](#)

## Add data files

### Upload a flat data file (CSV)

To upload a CSV file, follow these steps:

1. Select **Data** in the top navigation bar.
2. Select **Utilities** in the side navigation bar.



3. Select **Upload CSV**. Alternatively, navigate to step one of Setup, and click **upload CSV**.
4. Upload the CSV or Excel file using one of these options:
  - Click **Browse your files** and select the file.
  - Drag and drop the file into the drop area.
5. Answer the question **Are the column names already defined in the file header?**
6. Answer the question **How are fields separated?**
7. Click **Next**.
8. If column names are missing, click the column header to add column names that describe the attributes or measures in the columns. You can also change existing names to a simpler or more human-readable format.
9. Click **Next**.
10. Review the automatically-generated data types for each column, and make necessary changes. There are eight data types: **Integer**, **Large Integer**, **Decimal**, **Text**, **Date**, **Date\_Time**, and **Time**.
11. Click **Upload**.

**NOTE:** Users have an upload limit of one CSV file.

### Replace a CSV file

To replace your uploaded CSV file, follow these steps:

1. Select **Data** in the top navigation bar.
2. Click on your current CSV file in the list of data sources.
3. Select **Replace CSV** in the top right corner of your screen.

#### About ThoughtSpot

ThoughtSpot is the Modern Analytics Cloud company. Our mission is to create a more fact-driven world with the easiest to use analytics platform. With ThoughtSpot, anyone can leverage natural language search and AI to find data insights and tap into the most cutting edge innovations the cloud data ecosystem has to offer. Companies can now put the power of their modern data stack in the hands of every employee, extend the value of their data to partners and customers, and automate entire business processes. ThoughtSpot's web and mobile applications improve decision-making for every employee. With ThoughtSpot's low-code development platform, customers can also embed consumer-grade analytics into their SaaS offerings or build entirely new interactive data apps that engage users and keep them coming back for more. Organizations like Walmart, BT, Daimler, Medtronic, Hulu, Royal Bank of Canada, Nasdaq, OpenTable, Metromile, Workato, and Nationwide Building Society rely on ThoughtSpot to transform how their employees and customers take advantage of data. See for yourself and try ThoughtSpot today.



4. Answer the question **Are the column names already defined in the file header?**
5. Answer the question **Do you want to append to the existing data or overwrite it?** To add this data to your existing CSV file, choose **Append**. To create a new CSV file, choose **Overwrite**.
6. Answer the question **How are fields separated?**
7. Click **Next**.
8. Preview your data and click **Upload**.

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