
Before you begin: Log in to your Education sandbox

You have a shared sandbox environment to learn about, use, and experiment with MicroStrategy Web.

- 1 In your browser, navigate to **education.microstrategy.com/MicroStrategy/servlet/mstrWeb**.
- 2 Log in to the sandbox with your **MicroStrategy Account** credentials.
- 3 The MicroStrategy Landing page opens. Click the **MicroStrategy Tutorial** project.
- 4 Click **Go to MicroStrategy Web**.

The Shared Reports folder of the MicroStrategy Tutorial project opens.

In the sandbox environment, you cannot save items in the Shared Reports folder.

Exercise: Import external data directly into a document

As you review cost information for your retail stores, you want to compare supplier cost between regions. Your data is saved as a worksheet in an Excel file so you import the worksheet data into the document. The imported data displays as a dataset in the document; you can use the objects in the dataset to create grids, graphs, and dynamic text boxes. For your purposes, create a simple grid (a sample is shown below) to display costs by supplier and region.

Supplier	Region	Metrics	Cost
20th Century Fox	Central		\$53,491
20th Century Fox	Mid-Atlantic		\$48,473
20th Century Fox	Northeast		\$90,213
20th Century Fox	Northwest		\$19,371
20th Century Fox	South		\$56,526
20th Century Fox	Southeast		\$23,953
20th Century Fox	Southwest		\$39,928
20th Century Fox	Web		\$41,708
A&E Entertainment	Central		\$73,551

Import external data into a document

Create a new document

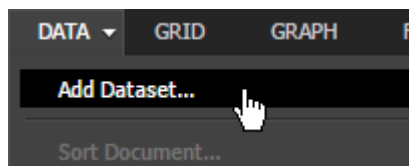
- 1 Access your Education sandbox. For a reminder on how to do this, see *Exercise: Access your Education sandbox*,
- 2 On the My Reports page in MicroStrategy Web, click **Create**, point to **New Document**, and select **01 Blank Dashboard**.

The 01 Blank Dashboard template uses a single document section to simplify the process of creating a document.

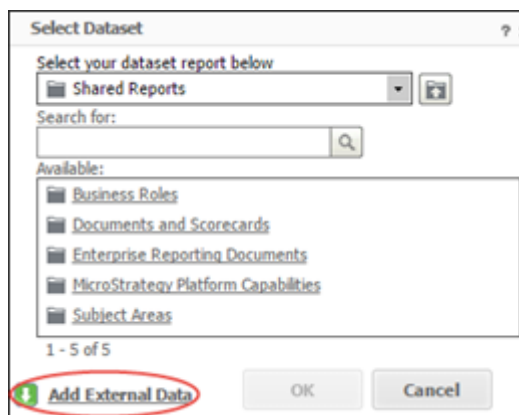
- Choose any of the dashboard templates to easily design an interactive document by using the whole screen and mimicking a dashboard.
- Select the Blank Document template to create a traditional document containing multiple sections. The Transactional Sales Detail Report by Customer document that you explored and edited in the *Getting Started with Documents* module used this template, and you select this template to create a new document in Exercise: Add a dataset object to display the category.

Import data

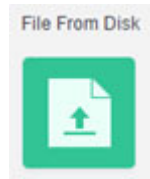
- 3 From the **Data** menu, select **Add Dataset**.



- 4 On the Select Dataset window, click **Add External Data**.



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- 5 On the Connect to Your Data page, click **File from Disk**.



- 6 On the Upload your Files page, click **Choose Files**.
- 7 On the Open window, navigate to the folder where you saved the exercise files, select **Supplier Report by Region.xlsx**, and click **Open**.
- 8 On the Upload your Files page, click **Finish**.

*This spreadsheet has been verified according to your company's data guidelines. If you need to preview and clean the data yourself, click **Prepare Data**.*

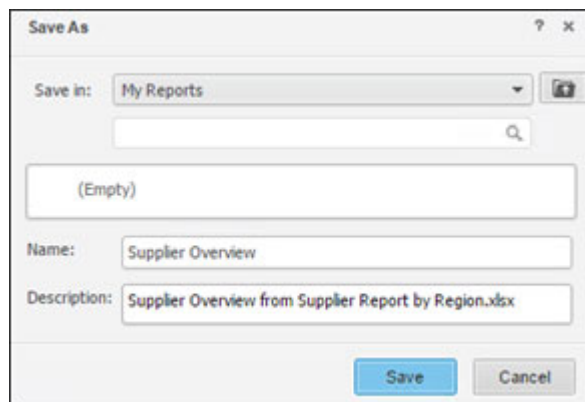
- 9 On the Select Worksheets window, clear the **All worksheets** check box. Select the **Supplier Overview** check box, and then click **Select**.

The Supplier Overview worksheet contains the data that you need to import. If you select multiple worksheets, they are combined into a single dataset.

- 10 On the Save As window, browse to the **My Reports** folder.
- 11 Type **Supplier Overview** (the name of the worksheet) in the **Name** field.
- 12 In the **Description** box, type **Supplier Overview from Supplier Report by Region**.

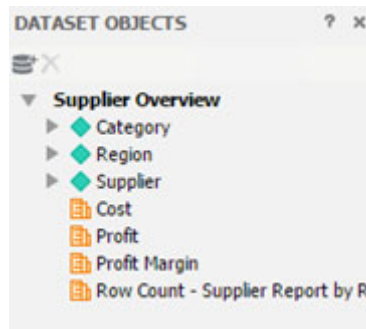
**Best
Practice**

Because the imported data is published as an intelligent cube available to other users, describe it well so others know what the cube contains.



13 Click **Save**.

The imported data is published as an intelligent cube saved in the selected folder. When the document opens, the objects in the spreadsheet file display in the Dataset Objects panel.



- When you add a dataset, the objects in the dataset display in this panel, organized by dataset. Expand and collapse datasets to help you focus on the one dataset that you are currently using.

Add a grid using the imported data

14 Add a blank grid. From the **Insert** menu, select **Grid**. Click and drag in the Detail Header document section to add the grid.

15 Drag **Supplier** and **Region** to the rows drop zone.

16 Drag **Cost** to the metrics drop zone. The grid placeholder should resemble the following:

Supplier	Region	Metrics	Cost
<Supplier>	<Region>		<Cost>

Save the document

17 Save the document as **Regional Supplier Cost** in the My Reports folder.

View the results

18 Click **Run Newly Saved Document**. The document opens in Presentation Mode. A sample is shown below.

Supplier	Region	Metrics	Cost
20th Century Fox	Central		\$53,491
20th Century Fox	Mid-Atlantic		\$48,473
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