Before you begin: Access Library in the Education sandbox

The Education sandbox is a shared, cloud-based environment to help you learn about and experiment with MicroStrategy Web and Library.

Use the Education sandbox to complete various report and dossier exercises. Complete the steps below to access the sandbox.

1   In your browser, navigate to **education.microstrategy.com/MicroStrategy/servlet/mstrWeb**.

2   Log in to the sandbox with your **MicroStrategy Account** credentials.

Open the Tutorial project

3   The MicroStrategy landing page opens. Click the **MicroStrategy Tutorial** project.

MicroStrategy Tutorial
MicroStrategy Tutorial project and application set designed to illustrate the platform's rich functionality. The theme is an Electronics, Books, Movies and Music store. Employees, Inventory, Finance, Product Sales and Suppliers are analyzed.
Server name

The MicroStrategy Tutorial home page opens.

4   Click **Go to MicroStrategy Library**.

5   If prompted, enter your **MicroStrategy Account** credentials, and then click **Log in with Identity**.

Your Library home page displays.

Exercise: Use Library Mobile to analyze store performance and interact with colleagues

In this exercise, you're a Regional Manager at DC General Store, a chain of convenience stores across the United States. Part of your role includes visiting stores in each region and reviewing key performance metrics with the store managers.

To pull up data details while meeting face-to-face with managers, leverage the DC General Store dossier on your mobile device.

Explore Library Mobile

1   From the Apple App Store (iOS) or Google Play (Android), search for and download the MicroStrategy Library on your mobile device.

2   Once the app is downloaded, tap the **Library** icon to open the app.

3 Explore the dossiers in the sample Library.

Configure Library Mobile to your Library

You have a shared sandbox environment to learn about, use, and experiment with MicroStrategy Library. Out of the box, Library Mobile is configured to communicate with the MicroStrategy Demo Server. Re-configure Library Mobile to access content from your sandbox Library.

1 In your browser, navigate to **https://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 Library**.

5 If prompted, enter your **MicroStrategy Account** credentials, and then click **Log in with Identity**.

Your Library homepage displays.

6 On your Library homepage, click the **DC General Store** dossier to open it.

DC General Store
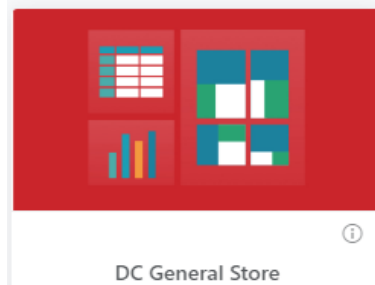
Use the search box in the toolbar if you need help finding the dossier.

7 Copy and paste the dossier URL into an email. Send the email to an address that is accessible on your mobile device.

8   Open the email on your device, then tap the dossier URL.

9   Library opens in a web browser. Log in with your MicroStrategy credentials.

10 The dossier displays in the browser Tap **Open** in the banner of the browser.
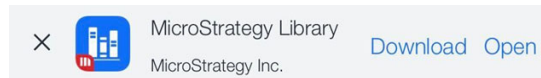
The DC General Store dossier opens in Library Mobile.

Interact with the DC General Store dossier in Library Mobile

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1   The dossier opens to the Summary page. If you are not on the Summary page, use the Table of Contents to navigate there. Follow the steps below that apply to your mobile device:

- To change chapters in a phone, tap the chapter name you are currently viewing from the toolbar. For example, in the image below, tap **Details**. Then, select the **Performance Summary** chapter.

- To change chapters on a tablet, tap the **Contents** icon and select the **Summary** chapter. The Sales Reps KPIs page is the only page in this chapter.
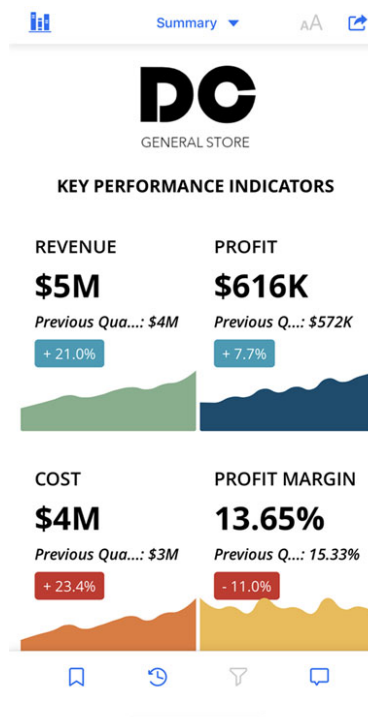
2 This page outlines key performance indicators for all DC General stores. You notice that revenue and profit are trending positively, but cost is rising and profit margin is trending down. You make a note to discuss this with store managers as you visit their locations.

3 The page includes a bar chart that compares revenue by store.


If you are using a smaller device, scroll to the bottom of the page to view the Revenue by Store bar chart.

4 You want to view only the data for 2020. Use the month slider to view different views of the Revenue by Store bar chart. Tap the left end point of the slider and move it to January 2020.
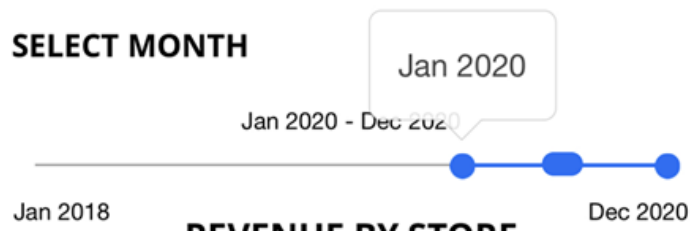
5 Tap the left end point of the slider and move it back to January 2018, to view data from January 2018 through December 2020 again.

6 In Library Mobile, you can expand individual visualizations to focus your analysis. As you're visiting individual stores soon, you want to take a deeper

look at revenue by store. Double-tap the **Revenue by Store** bar chart to expand it.

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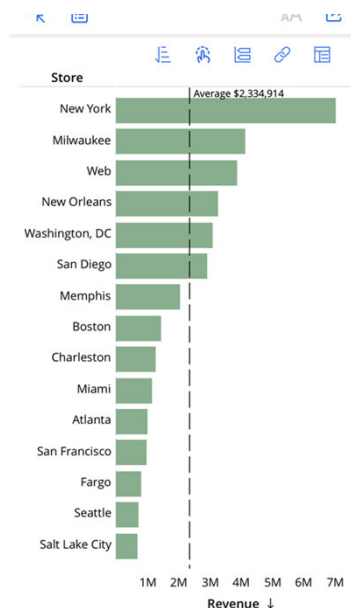
Customize the Revenue by Store bar chart

When you expand a visualization or tap a visualization on the dossier page, you have several options to customize your view. Follow the steps below to understand each of the options. If needed, tap the More icon ⋮ to open the visualization options.

1   Tap the **Sort** icon ⫤ to rearrange the order of the bars. Currently, the bars are sorted by revenue from high to low.
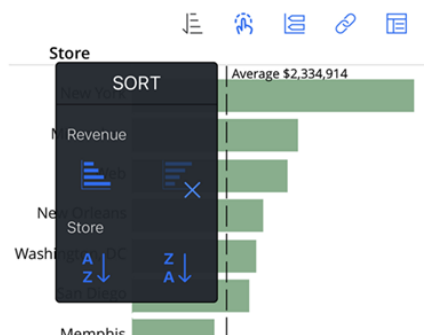
2   Tap the **Sort A to Z** icon ⫤ to sort the bar graph alphabetically. Tap the white space in the grid to close the sort menu.

3 Tap the **Select Data** icon 🐾 to narrow your view of the data, by methods such as drilling to a different level or excluding data points. You are visiting stores in the Mid-Atlantic region this week, so you want to view data for only those stores. Tap the **Boston**, **New York,** and **Washington, DC** bars, then tap the **check mark** icon ✓.
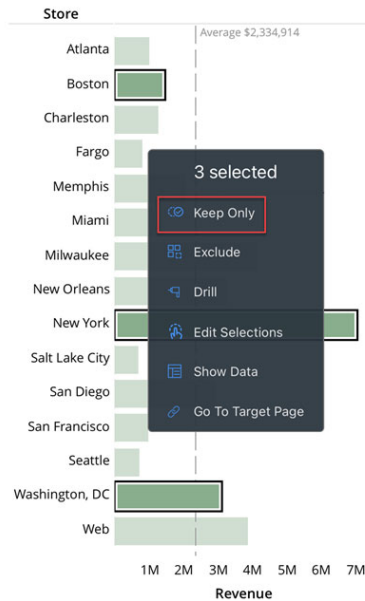

In the select menu, tap **Keep Only**. The bar chart now displays data for the Mid-Atlantic stores. Note that you can tap the **Clear Filter** icon to display all the stores in the bar chart.

4 Tap the **Compare Data** icon 🗐 to view the details for each bar. Tap the **New York** bar, the **Washington, DC** bar, then the **Boston** bar to compare the total revenues for each store.
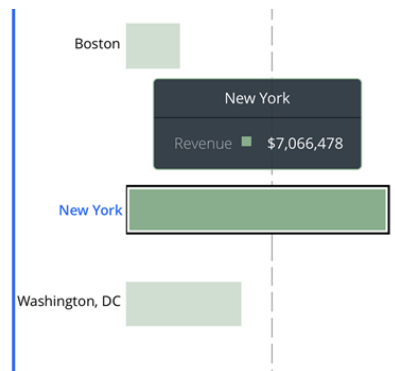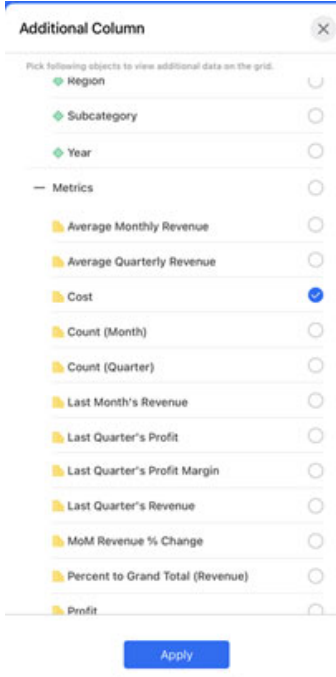

5 Tap **X** to return to the bar chart.

6 Tap **Link** icon 🔗 . A window opens, informing you that you can use the bars to navigate to another page, filtered for the bar you select.

7 Tap the **Show Data** icon ⊞ . Here, you can see the bar chart's data in a grid, add a column to the grid, change the font size of the grid by tapping the Grid Size icon ᴬA , and export the visualization as a PDF or Excel.
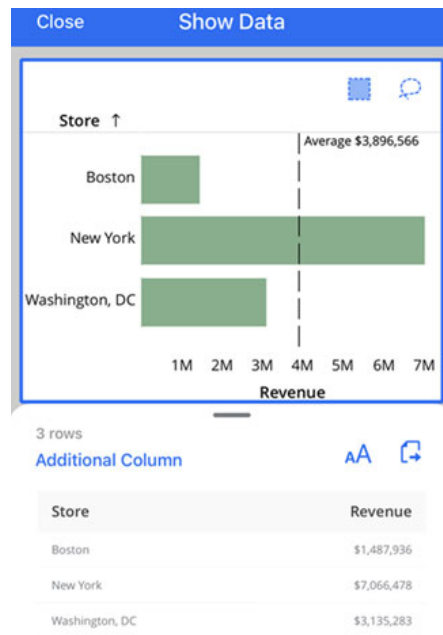
8 You would like to see the cost for each store. Tap **Additional Column** to see the available data you can add to the grid. Under Metrics, select **Cost**. Tap **Apply**.
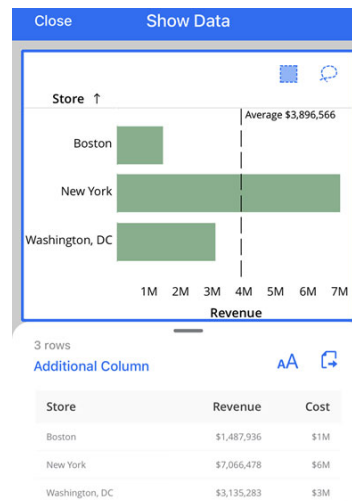
The grid now includes the Cost metric.

Tap **Close** to return to the bar chart.

**9** Double-tap the white space to return to the dossier page.

Use the bar chart to navigate to the Details page

As noted when you tapped the Link icon, the Revenue by Store visualization serves as a contextual link: you can tap a bar to navigate to a new page. That page is then filtered for the bar's corresponding store.
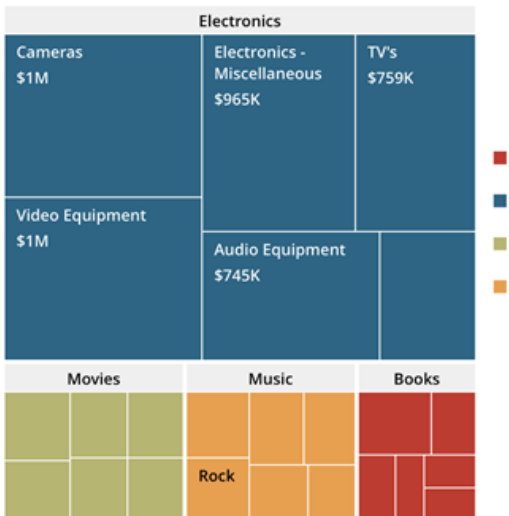
1 Your first stop is New York, so you want to view details for that store. In the Revenue by Store visualization, tap the **New York** bar, then tap **Go To Target Page**.
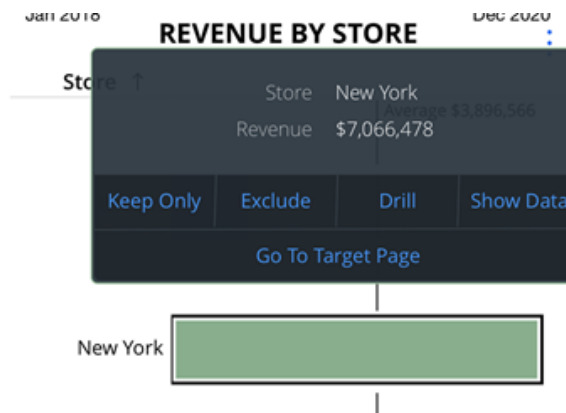
The Store Comparison, Details page opens.

CATEGORY/SUBCATEGORY BY REVENUE

This page includes a heat map that shows category and subcategory by revenue, and a grid with details around store performance.

Personalize views with bookmarks

You want to view data for all stores on the Details page, but you would like to have quick access to view only New York data. To do this, create a bookmark. Bookmarks preserve page views that contain filter selections and other manipulations, such as drilling and sorting.

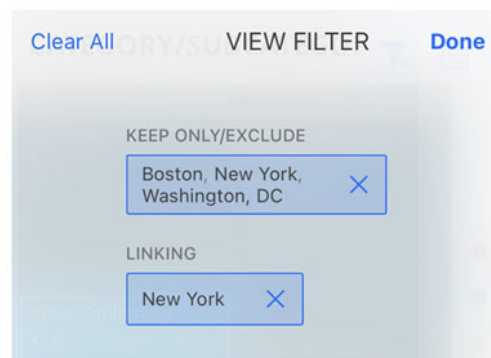**1** To add a bookmark, tap the **Bookmark** icon.
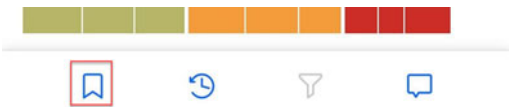
2 On the bookmarks screen, tap **Add New**.

3   Name the bookmark **New York Data**. Tap **Done** on your keyboard to add the bookmark.

4   Tap **Close** to close the bookmarks page.

Clear the filters and use the New York Data bookmark

5   To see the bookmark in action, clear the New York filter on the heat map and grid visualizations. Tap the **Category/Subcategory by Revenue** heat map, then tap the **Clear Filter** icon ![icon].

6   On the View Filter screen, tap **Clear All**, then tap **Done**.

7   Repeat the steps above for the **Store Comparison** grid.

8   Swipe right on the screen to navigate to the Store Analysis, Details page.

9   Tap the **Bookmark** icon, then tap the **New York Data** bookmark. The Details page opens, filtered for the New York store.

Explore the remaining pages and chapters

10 Explore the rest of the dossier, interact with filters, and create bookmarks. To reset the dossier to the original state, tap the **Reset** icon ![icon].

Download, subscribe, and share your dossier for further collaboration
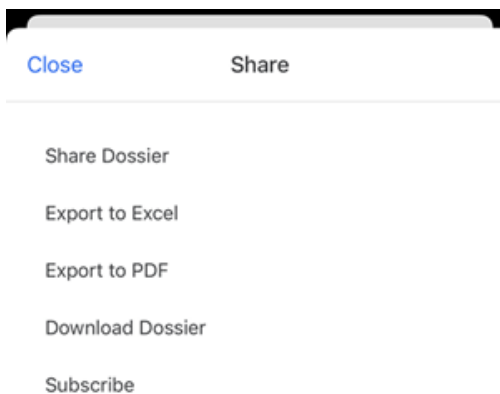
Because the Education sandbox is a shared training environment for users across a variety of organizations, sharing is disabled for security purposes.
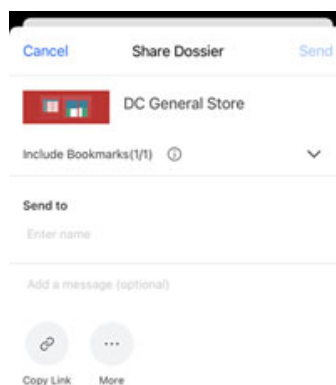
The steps below are for reference only and cannot be completed in the sandbox environment.

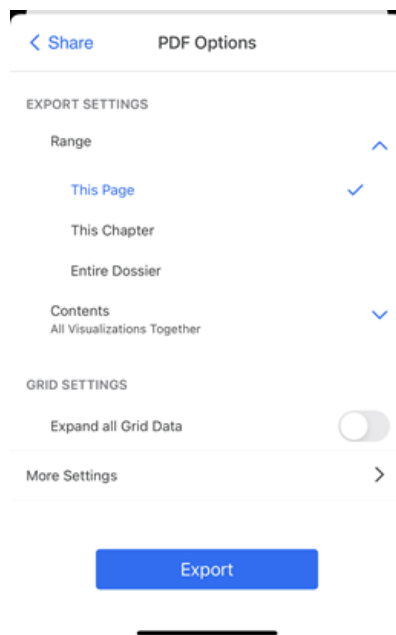**1** You can share dossiers via Library Mobile. Tap the **Share** icon ➦ .

2 Tap **Share Dossier**. You can send your dossier via email, link, or SMS.

3 Tap **Cancel**.

4 You can also select content to download and export. You can export the dossier as an Excel, PDF, or .mstr file. Tap **Export to PDF**. You can select what content to export, grid settings, layout options, and display options.

5 Tap **Share** to return to the Share menu, then tap **Close**.

Collaborate with comments and discussions

In your Library, as you interact with a dossier, you can collaborate via page-specific discussion threads and real-time comments within the dossier. Anyone who has access to a dossier through MicroStrategy Library, either in Web

or on a mobile device, can post comments to tag users, ask questions, and share their current filter state with others.
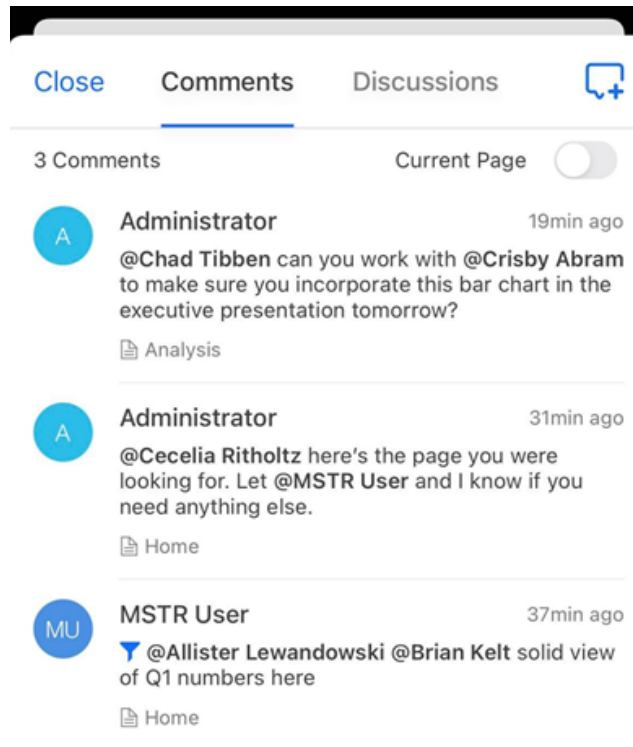
You can view comments from all pages, regardless of the page you're currently viewing, to help you understand what your colleagues are discussing and where you might need to direct your attention to. Tap the page name below the comment to navigate to that page.

Once you have navigated to the page for further analysis, you might want to focus only on comments relevant to that page. To display comments only for the page you are viewing, enable the Current Page option.
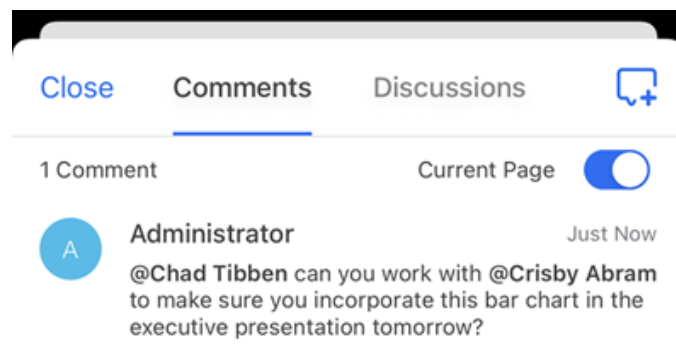
You can also create private discussions with specific users. Discussions are an easy way to have a private conversation with others directly in Library alongside the relevant dossier, without needing to communicate separately in an email or a messaging application. In addition, discussions do not clutter a public conversation with information that is only relevant to a few individuals.
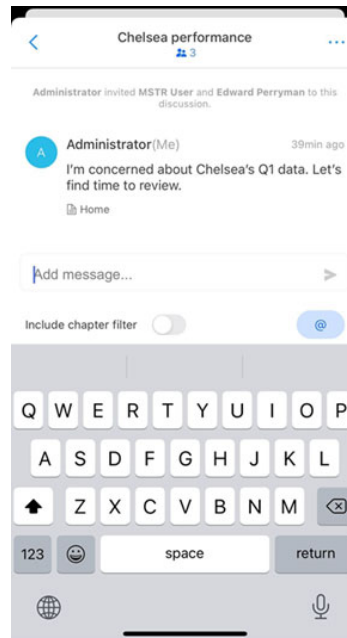
Once you tag users in comments or invite them to view a dossier, they can receive real-time notifications via email, page and library alerts, or push notifications.

**Communicate with colleagues in the DC General Store dossier**

Because the Education sandbox is a shared training environment for users across a variety of organizations, sharing is disabled for security purposes. The steps below are for reference only and cannot be completed in the sandbox environment.

1 You would like to show the New York City store manager the data in the dossier. From the Store Comparison, Details page, swipe right to navigate to the **Store Analysis, Details** page.

2 You can include filters in your comments. You want to filter this page to only show data for the New York City store. Tap the **Filter** icon ▽.

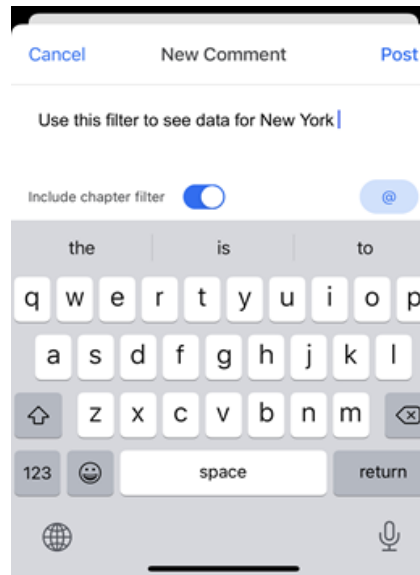3 Tap the **Store** filter, then tap **Clear All**.

4 Select **New York**, then tap **Apply(1)**.
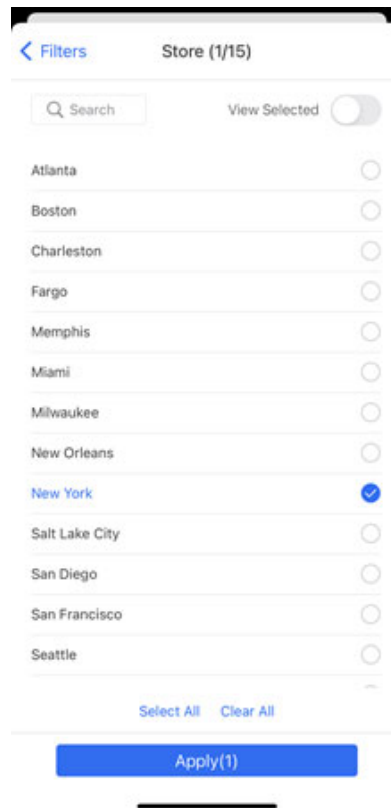
5 Tap the **Comment** icon 　, then tap **Add New** to add a comment.

6 In the comment area, type: **Use this filter to see data for New York.**

7 You want to include the current chapter filter for coffee in your comment. Toggle on **Include chapter filter**.

8 Tap **Post** to leave your comment.

When you type @user, you tag the user in your comment, prompting notifications to that user. When you enable the chapter filter, the comment saves your current filtered view of the dossier chapter. When you add a comment with a filter, be sure to describe it in the comment so the user understands what happens when they tap the filter.

9 To interact with the filter in your comment, first clear the current filter. Tap the **Filter** icon and tap **Clear All Filter**.

10 Tap the **Comment** icon, then tap the **Filter** icon. The chapter filters to only show data for New York.