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.

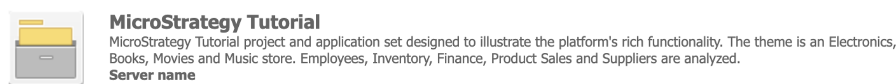
Use the Education sandbox to complete various report and dossier exercises. Complete the steps below to access the sandbox.

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.



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.

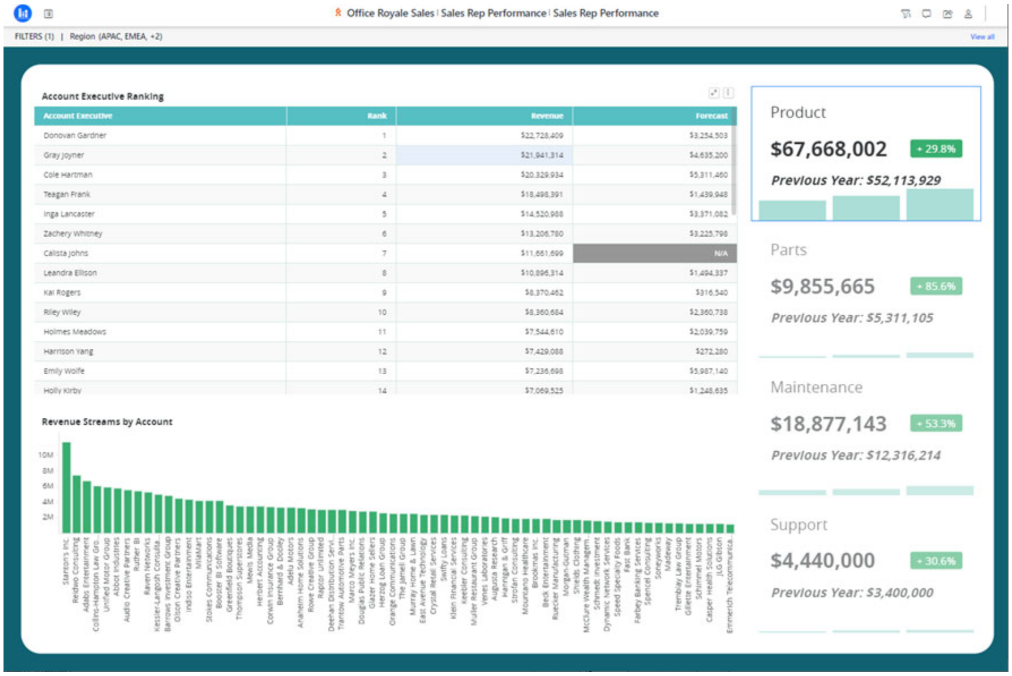
Exercise: Drill on a grid to analyze performance by sales representative

Now that you have a high-level view of KPIs, you want to analyze performance by sales representative in your region.

Analyze performance by sales representative

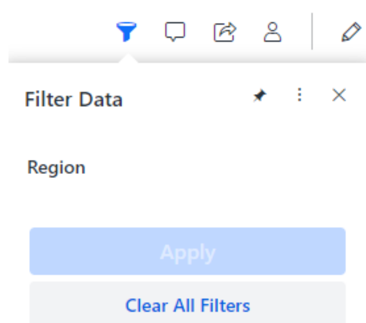
1 If needed, reopen the **Office Royale Sales** dossier. For a reminder on how to do so, see *Exercise: Open and start to explore the Office Royale Sales dossier*.

2 From the Table of Contents, open the **Sales Rep Performance** page.

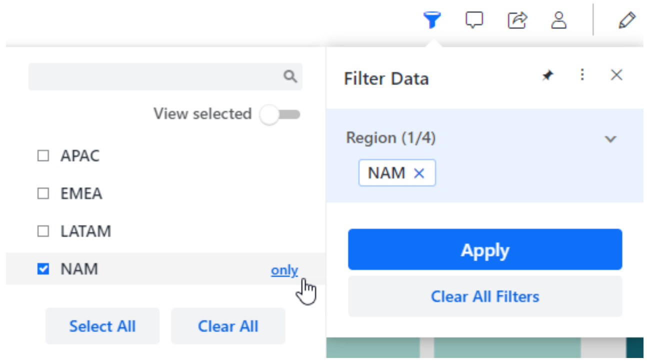


This page analyzes performance by sales representative (also called account executive). The grid is sorted by rank and displays values for both revenue and forecast. The KPIs on the right display revenue by type, with a bar chart showing trends. The bar chart at the bottom breaks down revenue by account to showcase the top and bottom accounts.

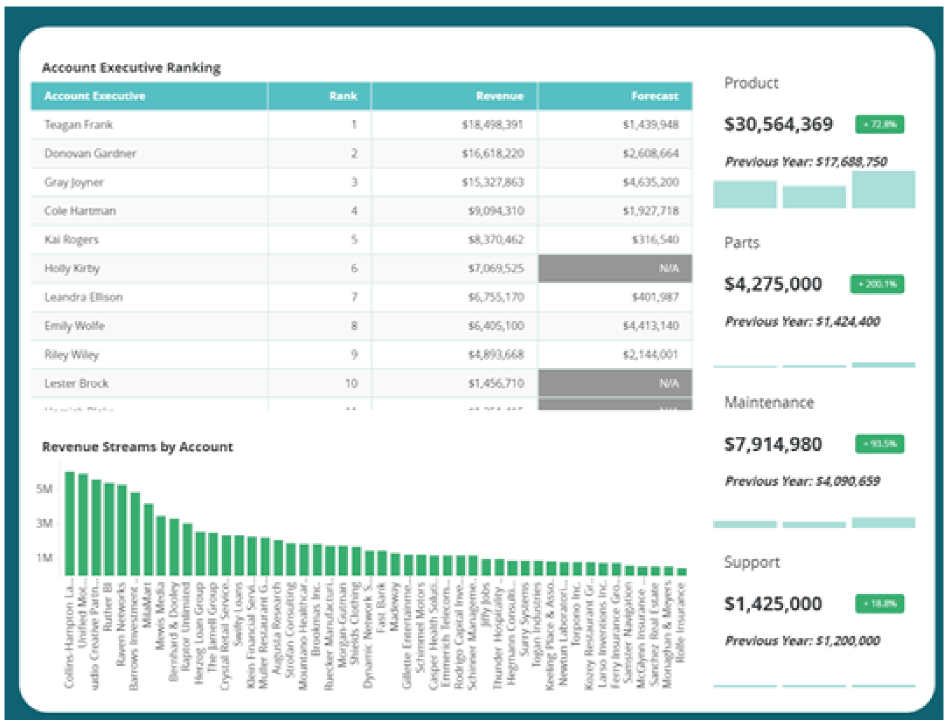
3 Click the **Filter** icon.



4 You want to view the data for sales representatives in your region to focus your analysis. In the Filter panel, click **Region** and hover over **NAM**. Then, click **Only** to show data for the North America region.



5 Click **Apply**. With the data for only North America showing, you can see that overall numbers are trending well, particularly revenue from parts sales, which has gone up 200% this year.

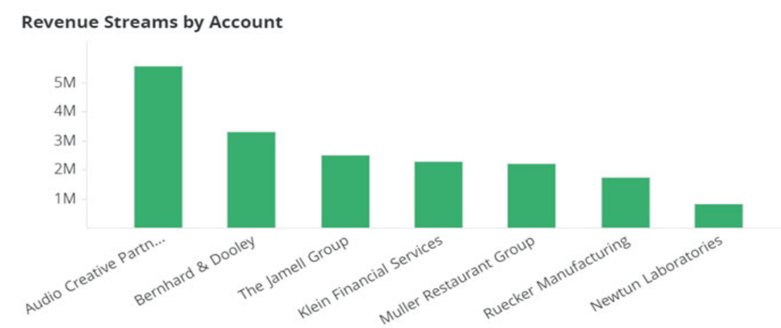


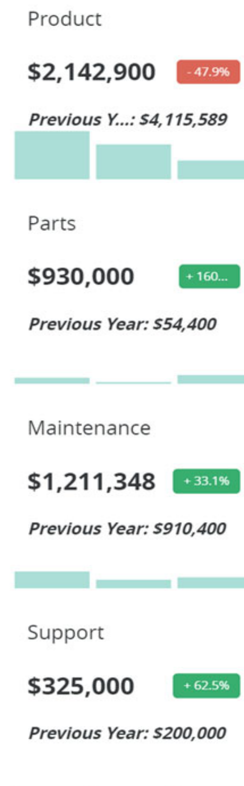
6 Now you want to understand performance by each sales rep. You can use the grid to select an Account Executive to filter the KPIs and the bar chart. Teagan Frank brought in the highest revenue this year, but her revenue forecast is

lower than the other top 4 reps. Click **Teagan Frank** on the grid to narrow the data to analyze her performance.

Account Executive Ranking

Account Executive	Rank	Revenue	Forecast
Teagan Frank	1	$18,498,391	$1,439,948
Donovan Gardner	2	$16,618,220	$2,608,664
Gray Joyner	3	$15,327,863	$4,635,200
Cole Hartman	4	$9,094,310	$1,927,718
Kai Rogers	5	$8,370,462	$316,540
Holly Kirby	6	$7,069,525	N/A
Leandra Ellison	7	$6,755,170	$401,987
Emily Wolfe	8	$6,405,100	$4,413,140
Riley Wiley	9	$4,893,668	$2,144,001
Lester Brock	10	$1,456,710	N/A

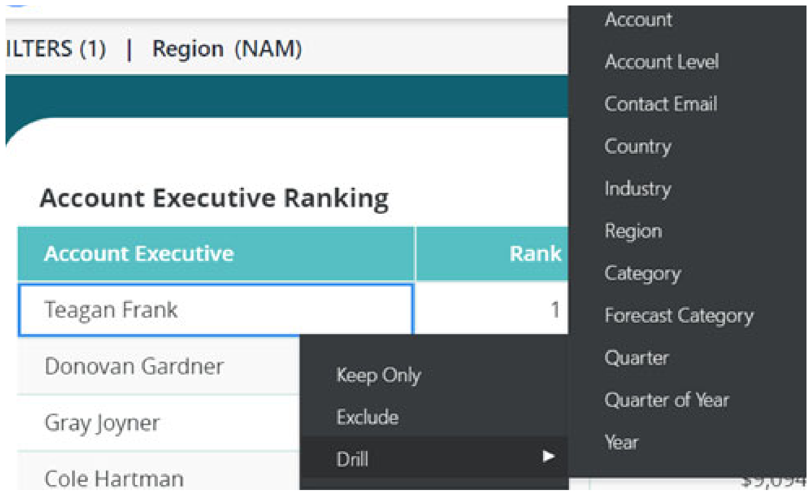




Based on these numbers, what advice would you give Teagan? Where should she focus her efforts to increase her pipeline?

Drill to the account level

7 To further analyze Teagan's performance, you want to view revenue and forecast for each of her accounts. On the grid, right-click **Teagan Frank** and hover over **Drill**.



8 The drill menu shows all the different levels of data you can see within the grid. You can drill to a higher level, such as region. In this case, you want to drill to a more granular level. Click **Account** to see the accounts Teagan owns.

Account	Rank	Revenue	Forecast
Audio Creative Partners	1	$5,567,089	N/A
Bernhard & Dooley	2	$3,310,550	N/A
The Jamell Group	3	$2,524,248	$646,974
Klein Financial Services	4	$2,297,856	N/A
Muller Restaurant Group	5	$2,224,248	$646,974
Ruecker Manufacturing	6	$1,749,400	N/A
Newtun Laboratories	7	$825,000	$50,000
Dare Health Consulting	8	N/A	$96,000

Based on these numbers, would you change your advice to Teagan?