

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.



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

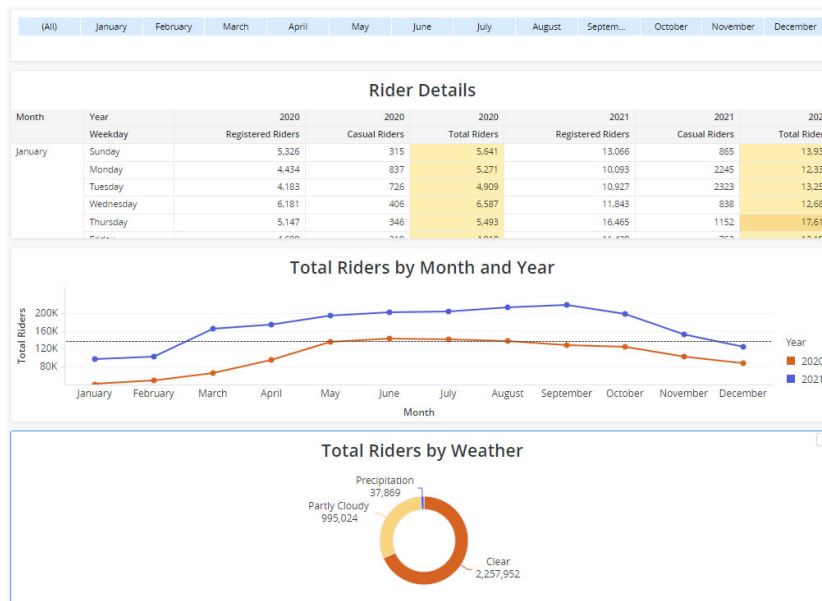
- 4 Click **Go to MicroStrategy Web**.

The Shared Reports folder of the MicroStrategy Tutorial project opens.

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

Exercise: Improve your dossier page design to facilitate analysis

You return to your Golden Bikes dossier page to assess how it is currently arranged, considering best practices for dossier page design.



You notice some areas needing improvement:

- The grid, which provides detailed information, is at the top of the page. You want analysts to first gain an understanding of the high-level data and trends, before exploring the details. It makes more sense for the line chart and the ring chart, which summarize the data, to be at the top of the page where users see them first.
- The filter is displayed at the top of the page, which could imply that it applies to all visualizations in the page, but it only applies to the grid. You can use a text box to clarify the filter's functionality and visually separate it from the line chart and ring chart.
- There is a lot of white space around the ring chart that you can use more efficiently if you place the ring chart horizontally next to another visualization.
- There is no page title to help analysts quickly understand the purpose of the page. Renaming the page in the table of contents or adding a text box with a title directly on the page can help analysts understand the overall content of the page.

*To rename a chapter or page, right-click it in the table of contents and select **Rename**.*

Improve your dossier page design by addressing the issues detailed above.

Prerequisites

This exercise builds on progress you've made with the dossier so far. Before you begin:


- 1 Open the Education Sandbox. For a reminder on how to do this, see *Exercise: Access the Education sandbox*.
 - 2 In Library, open the Golden Bikes dossier in Edit mode. For a reminder on how to do this, see *Exercise: Add the Golden Bikes dossier to MicroStrategy Library*.
 - 3 Ensure that you have:
 - Manipulated the grid visualization (*Exercise: Manipulate a grid visualization to meet analysis goals*).
 - Formatted the grid visualization (*Exercise: Format a grid visualization to enhance readability*).
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- Formatted the line chart (*Exercise: Format a line chart to support quick comparisons*).
- Created and formatted the ring chart visualization (*Exercise: Create and format a ring chart visualization to view part-to-whole contributions*).

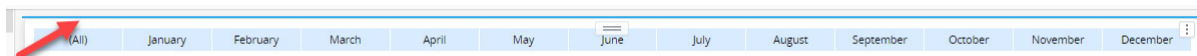
Arrange visualizations

Move the line chart and the ring chart, which summarize the data, to the top of the page, where users see them first. Place them next to each other horizontally to efficiently use the space available.

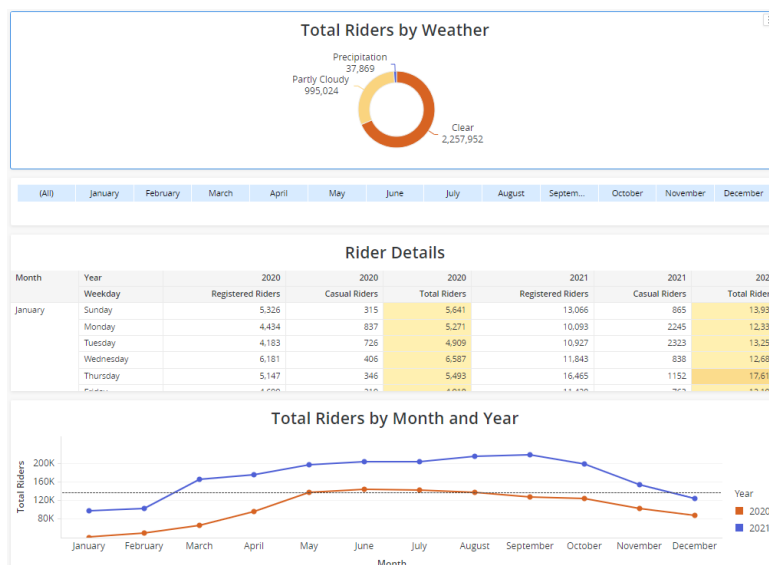
You use the default Auto Layout in this exercise, which means that visualizations automatically fill the entire canvas, and you can reposition them around each other.

For more precise control over object sizing and positioning, you can use free-form layout by clicking the Convert to Free-form icon  in the dossier toolbar.

- 1 In the Golden Bikes dossier, click the **Total Riders by Weather** visualization (the ring chart). A blue line displays around the visualization to let you know that you have selected it.
- 2 Drag the **Total Riders by Weather** visualization to the top of the dossier page, until a blue line displays above the filter, indicating that the visualization will move to that location when you drop it.

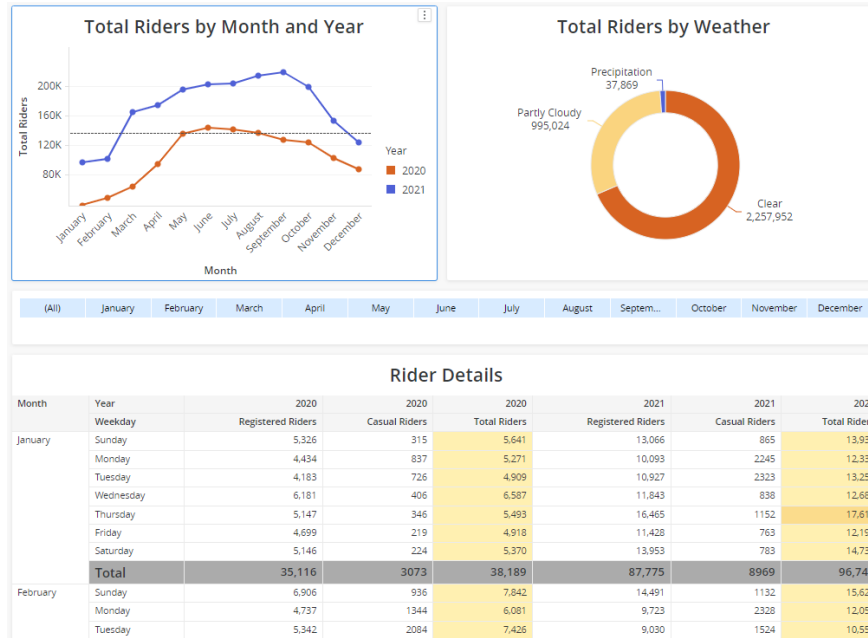


The ring chart displays at the top of the dossier page, above the filter.




- Click and drag the **Total Riders by Month and Year** (line chart) visualization to the left of the ring chart visualization and above the filter, and drop it when the blue line displays.

The line chart displays to the left of the ring chart.



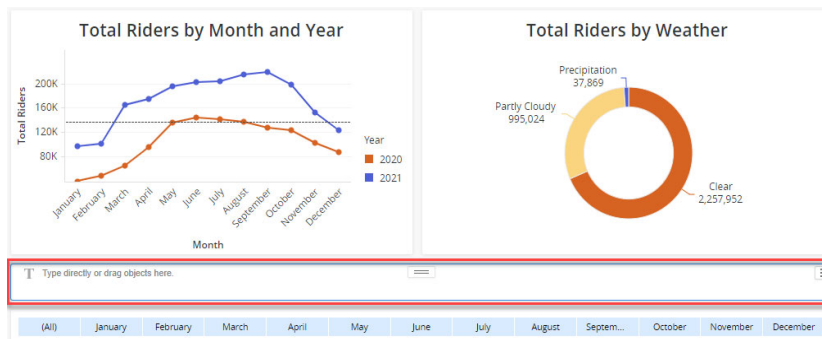
Add text to clarify the filter functionality

To clarify that the filter only applies to the grid visualization, add a text box with this information. You can use text boxes to explain features of your dossier or individual visualizations, to ensure that analysts understand the functionality and can effectively explore the data.

- In the toolbar, click the **Text** icon  and then select **Text**. A text box displays at the top of the page.

To format individual characters, words, or phrases separately, use a Rich Text box.

- Drag and drop the text box so that it displays below the line chart and ring chart, and above the filter.

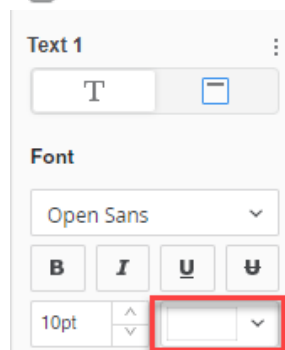


3 In the text box, type the following text:

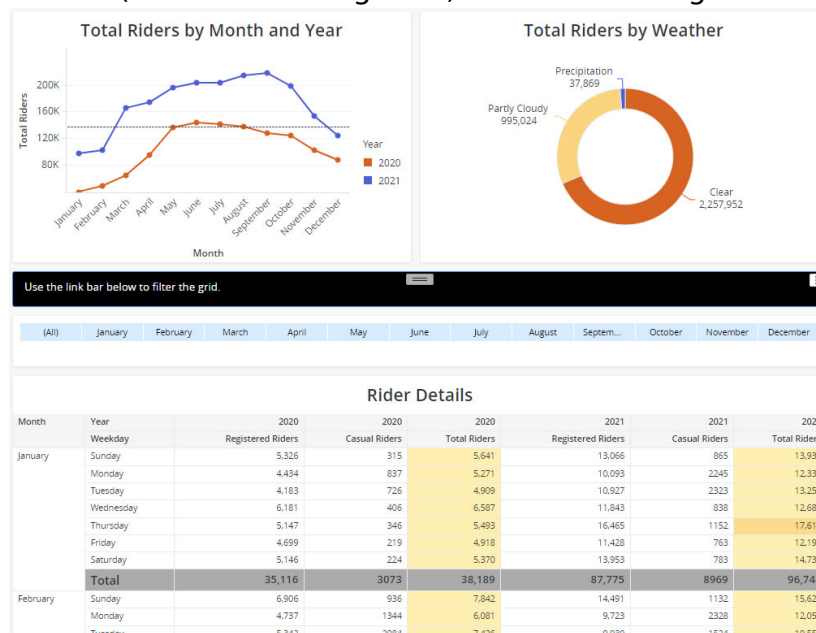
Use the link bar below to filter the grid.

4 In the Format panel, select **Title and Container** . Use the **Fill** color drop-down list to change the fill color of the text box to **Black #000000** .

5 In the Format panel, select **Textbox Options** . Change the font color of the text box to **White #FFFFFF** .




The text clarifies the filter functionality, and the color formatting of the text box helps it serve as a good visual separator between the summary-level visualizations (line chart and ring chart) and the detailed grid.




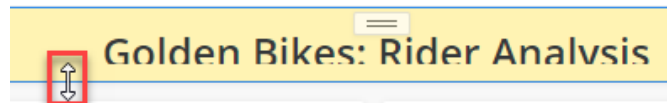
Add a page title

Add a page title to emphasize the purpose of the page. You decide to use a text box to add the title directly on the page.

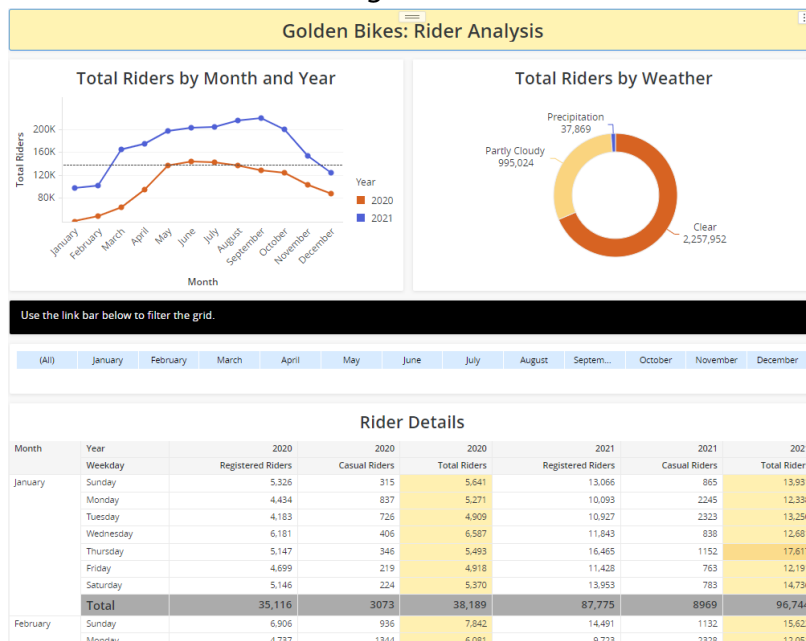
- 1 In the toolbar, click the **Text** icon  and then select **Text**. A text box displays at the top of the page.
- 2 In the text box, type the following:

Golden Bikes: Rider Analysis

- 3 In the Format panel, format the text box so that it meets the following requirements:
 - Font style is **Bold**
 - Font size is **18**
 - Text is **center aligned**
 - Fill color is **Buttermilk #FFF3B3** 
- 4 Now that the font size in the text box is larger, you cannot see all of the text without using the text box's scroll bar. On the dossier page, drag down the bottom of the text box to make it taller, so that all of the text is visible without needing a scroll bar.



Your dossier looks like the image below.



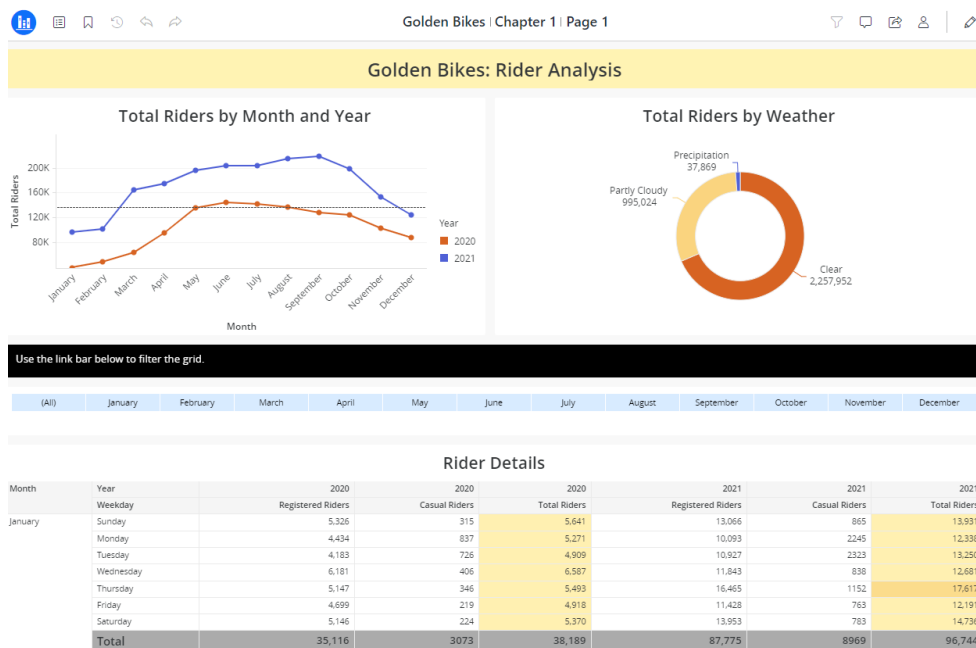
5 Save your dossier.

Switch to View mode

Use View mode when you want to use your dossier for analysis, rather than make underlying changes to the objects and formatting. View mode maximizes the amount of data that is displayed at one time and reduces distractions because it does not display the toolbars, menus, and panels that are available in Edit mode.

You can still interact with the data in View mode; for example, you can hover over data to display tooltips, drill on the grid, and use the link bar to filter the grid.

6 Now that you are finished editing your dossier page, switch to View mode by clicking the **X** in the upper right of the dossier.



To switch back to Edit mode, click the **Edit** icon  in the upper right of the open dossier.