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## 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.

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### Access Library in the Education sandbox

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- 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** ENV-218880LAIOUSE1

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.

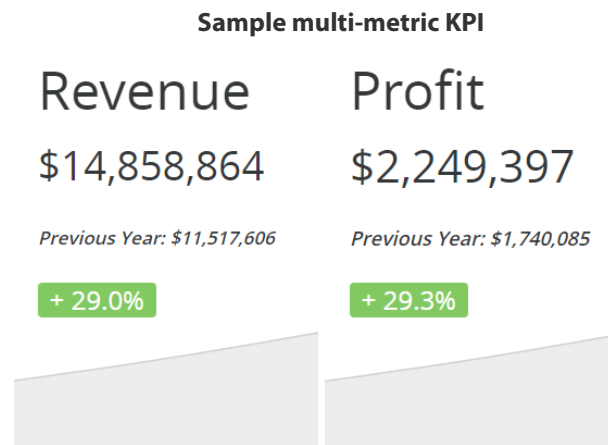
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## Exercise: Create a KPI visualization

As a result of your excellent work and analysis as a store manager, you have been promoted to Vice President. In this new position, it is important for you to understand revenue and profit across store locations. You need quick access to these values as you attend various meetings to discuss company performance and improvement strategies.

To provide an easy-to-comprehend, high-level overview of the profit and revenue measurements, create a multi-metric KPI visualization. Your completed multi-metric KPI looks like the image below.



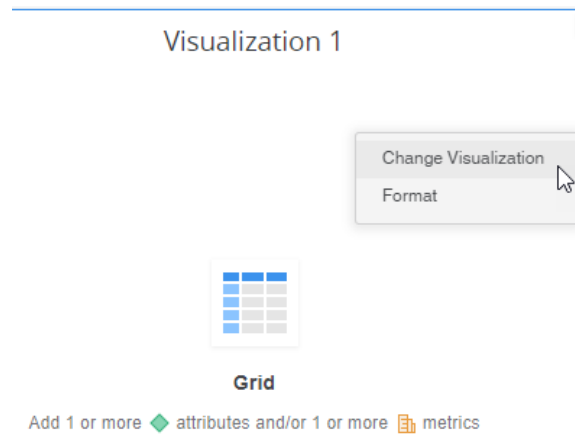
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### Create a multi-metric KPI visualization

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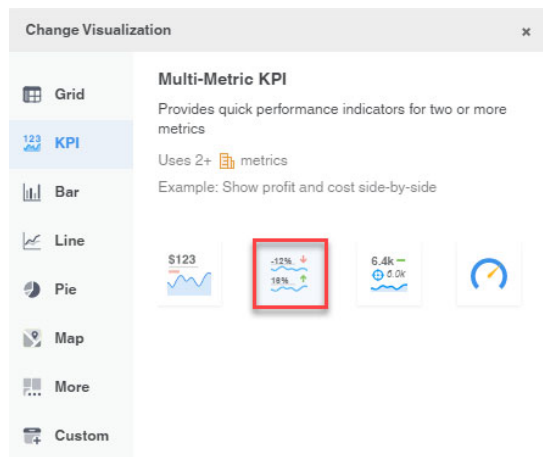
- 1 In the Education sandbox Library, open the **Visualization Types** dossier in Edit mode, if not already there. For a reminder on how to do this, see *Exercise: Access Library in the Education sandbox*, and *Exercise: Add the Visualization Types dossier to MicroStrategy Library*.
  - 2 In the Contents panel on the left, in the Data Details chapter, click the **KPIs and Gauge Chart** page.
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- 3 By default, a new page displays a blank grid visualization on the canvas. To change the visualization to a multi-metric KPI, right-click inside the visualization, and select **Change Visualization**.




The Change Visualization window opens, displaying the Visualization Gallery.

- 4 In the Visualization Gallery, point to **KPI**, and then click the **Multi-Metric KPI** icon.



The dossier canvas displays a blank multi-metric KPI visualization.

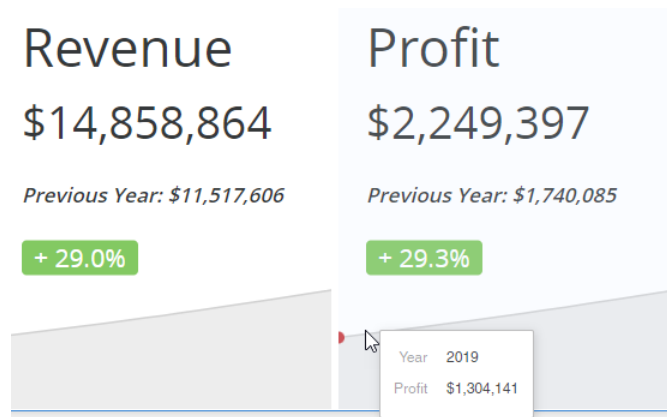
- 5 The data you need for this analysis is stored in the Satisfaction and Performance dataset. In the Datasets panel, click the arrow icon ► to the left of the **Satisfaction and Performance** dataset to expand it, if it isn't already. The dataset's attributes and metrics display.
- 6 To focus on the objects in the Satisfaction and Performance dataset rather than the other datasets, collapse any other datasets that are expanded by clicking the arrow icon ▼ to the left of the dataset name.
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- Click the **Editor** icon  to display the Editor panel, if not already displayed.
- From the Satisfaction and Performance dataset, double-click **Revenue** to add it to the **Metric** drop zone in the Editor panel. The total revenue amount (across all stores for all years in your dataset) displays in the visualization.
- Double-click **Profit** to add it to the **Metric** drop zone. The total profit amount (across all stores for all years in your dataset) displays in the visualization, next to Revenue.


- 10** You want to display trends for revenue and profit to help you quickly understand how these metric values have changed over time. Drag **Year** to the **Trend** drop zone.

- The prominent KPI value now displays the revenue or profit for the current year rather than the total across all years. For example, the profit value used to display \$5,293,624 and now displays \$2,249,397.
- The previous year's value displays below the total value. For example, the previous year's profit value was \$1,740,085.

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- A colored trend indicator displays the percentage change from the previous year to the current year. For example, profit increased 29.3% from the previous year to the current year.
  - An area chart displaying the trend displays at the bottom of each KPI. You can see that both revenue and profit steadily increased each year.
- 11** Hover over the area charts to view a tooltip displaying revenue or profit values for a specific year. In the image below, you can see that in the year 2019 profit was \$1,304,141.




#### Format the multi-metric KPI

- 12** Depending on the size of your browser window, the Previous Year label might not fully display, as shown below. To adjust the text size to fit the container, click the **Format** icon  to display the Format panel.

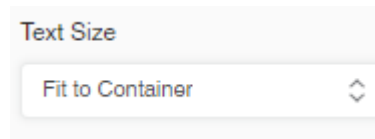
Revenue

\$14,858,864

*Previous Ye...: \$11,517,606*

- 13** In the Format panel, click **Text and Form** .
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- 14** In the Font area, from the first drop-down list under **Text Size**, select **Fit to Container**.

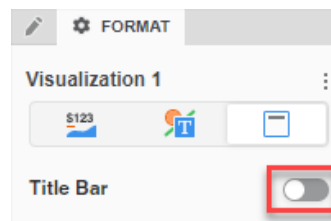


The Previous Year label now fully displays.

Revenue  
\$14,858,864

*Previous Year: \$11,517,606*

- 15** The KPIs are already labeled as Profit and Revenue, so you decide to hide the visualization title, which currently displays as Visualization 1. In the Format panel, click **Title and Container** , and then disable **Title Bar**.



The title bar no longer displays at the top of the visualization. Your multi-metric KPI should now look like *Sample multi-metric KPI*.

- 16** Click **Save** in the upper right of the dossier toolbar.

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### Analyze the multi-metric KPI

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- 1** As you examine the KPI visualization, answer the following questions:
- How easy is it to quickly understand how well the organization is generating revenue and profit? What parts of the visualization make this easy or hard to understand?
  - What other visual indicators might you add to the KPIs to make the analysis easier?
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*You might add a threshold to the current year values. For example, if the current year revenue or profit is less than \$5,000,000, it can display in red. This helps users quickly understand when the KPI is below a specified amount and might need to be addressed by the organization.*

- Do you think that an appropriate number of KPIs are displayed on this page? Is it better for you to display more or fewer, and why?