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: Analyze different data views with filters in the Office Royale Sales dossier

Use different filters in the Office Royale Sales dossier to answer business questions.

**Understand key metrics by country and region**

As the Regional Sales Manager, you focus on sales in North America, specifically the United States and Mexico, so you would like to see overall key performance indicators in your region.

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 Use the Table of Contents to navigate to the **Revenue Analysis** page. Then, click the **Geography Analysis** panel.
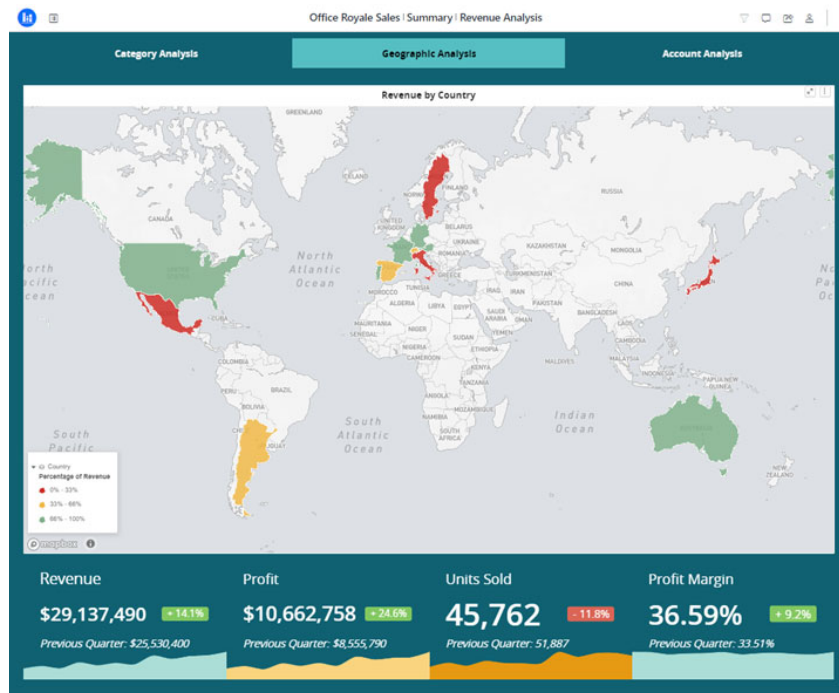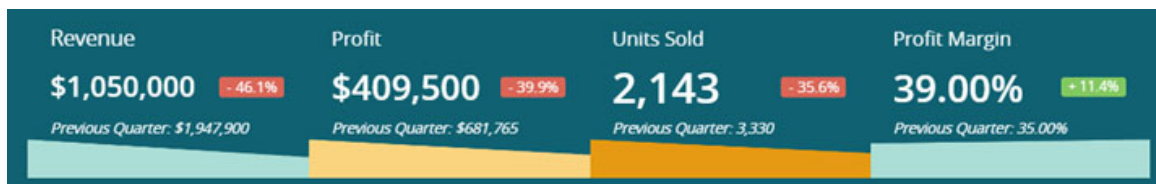
This panel analyzes Revenue by Country. The map visualization shows countries by percentage of Revenue with color-based thresholds, enabling you to quickly decipher which countries contribute more or less to overall Revenue.

3 You can select a country in the map to filter the KPIs below, which have trend lines and indicators. Click the **United States**, then press **CTRL** on your keyboard and click **Mexico**.
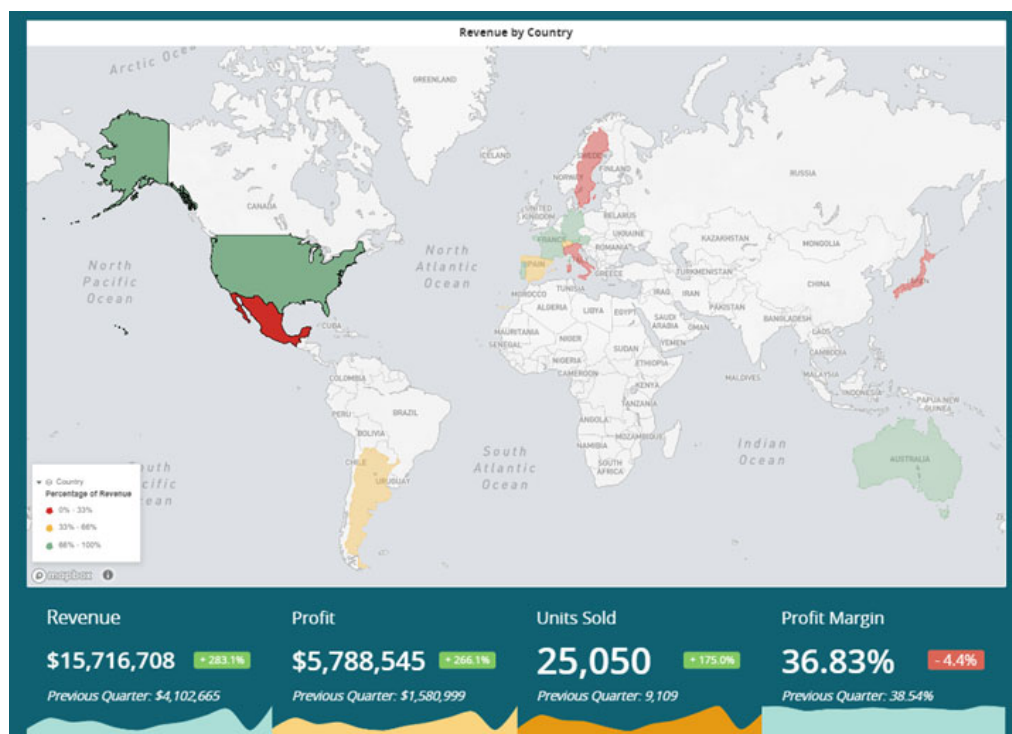
4 Your goal this quarter is to grow business in Mexico, so you'd like to focus your analysis further. Click the **United States** to clear it from the filter.

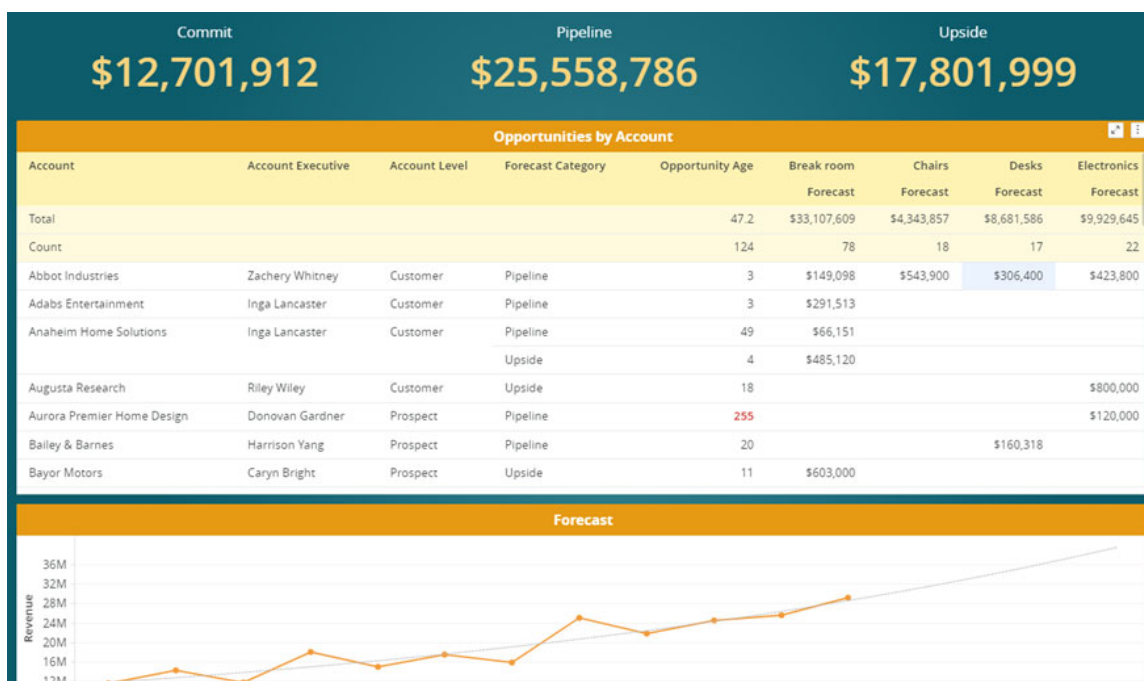| Revenue	Profit	Units Sold	Profit Margin
$1,050,000 - 46.1%	**$409,500** - 39.9%	**2,143** - 35.6%	**39.00%** + 11.4%
Previous Quarter: $1,947,900	Previous Quarter: $681,765	Previous Quarter: 3,330	Previous Quarter: 35.00%

Though Profit Margin is trending up, the other three metrics have fallen significantly quarter over quarter. With this in mind, you want to dig deeper to discover the root of the issue (is there an issue with product quality or breakdown in customer service?) to help overhaul your business strategy.

**5** Click the gray area on the map to clear the filter.

Review opportunities by industry

1 Now that you have a high-level view of KPIs across the last year, you want to analyze opportunities for the year ahead. From the Table of Contents, select the **Opportunity Analysis** page.

	Commit				Pipeline				Upside	
	$12,701,912				**$25,558,786**				**$17,801,999**	

Opportunities by Account

| Account	Account Executive	Account Level	Forecast Category	Opportunity Age	Break room Forecast	Chairs Forecast	Desks Forecast	Electronics Forecast
Total				47.2	$33,107,609	$4,343,857	$8,681,586	$9,929,645
Count				124	78	18	17	22
Abbot Industries	Zachery Whitney	Customer	Pipeline	3	$149,098	$543,900	$306,400	$423,800
Adabs Entertainment	Inga Lancaster	Customer	Pipeline	3	$291,513			
Anaheim Home Solutions	Inga Lancaster	Customer	Pipeline	49	$66,151			
			Upside	4	$485,120			
Augusta Research	Riley Wiley	Customer	Upside	18				$800,000
Aurora Premier Home Design	Donovan Gardner	Prospect	Pipeline	255				$120,000
Bailey & Barnes	Harrison Yang	Prospect	Pipeline	20			$160,318	
Bayor Motors	Caryn Bright	Prospect	Upside	11	$603,000			

Forecast

This page explores revenue forecast, broken into categories: Commit, (the sales rep is confident in the deal or received a verbal agreement), Pipeline (early stage deals), and Upside (the contract will likely be signed, but the sales rep hasn't ironed out all the details). At the bottom of the page, the line chart visualizes revenue over time. A trend line with forecasting enabled has been added to illustrate future revenue projections based on past performance.

2 Click the **Filter** icon ⛛ to view the filters that the dossier author added to the Opportunity Analysis chapter. Filters from the Filter panel apply to all pages within a chapter.
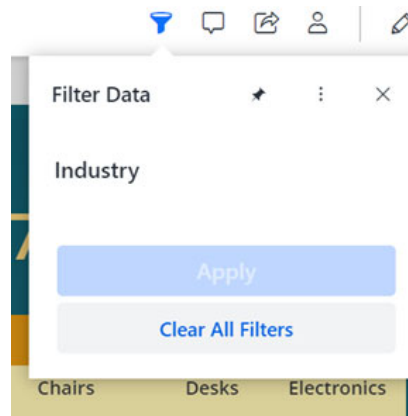

3 Click the **Pin** icon 📌 to keep the Filter panel open, and then click **Industry** in the Filter panel.
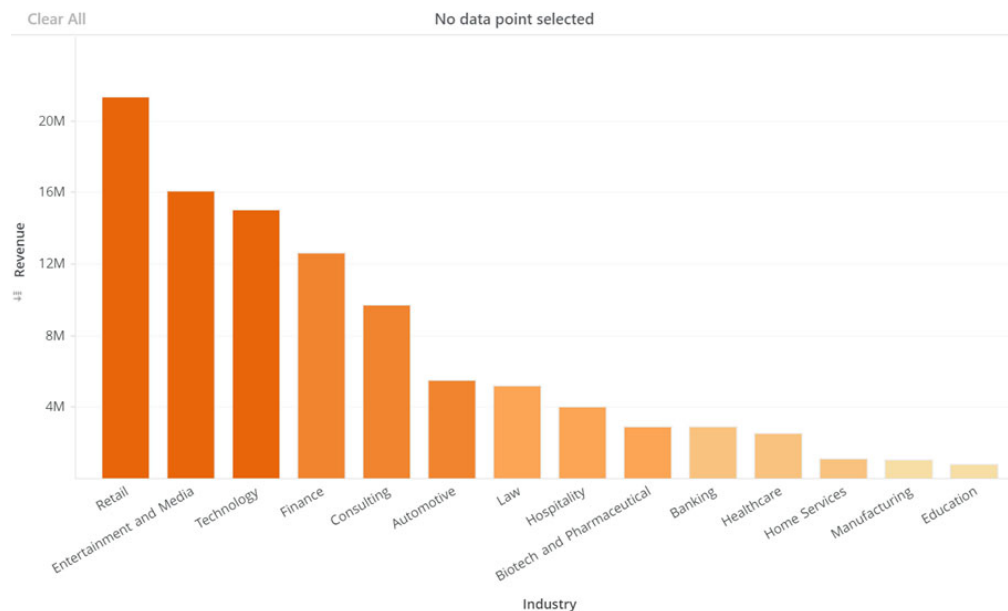
4 The dossier author added a bar chart as a filter that displays each potential customer's industry, sorted from high to low revenue. You would like to review the top industries to analyze what stages the contract are in. Click **Retail**, then press **CTRL** on your keyboard. Click **Entertainment and Media** and **Technology**.

5 Click **Apply**.
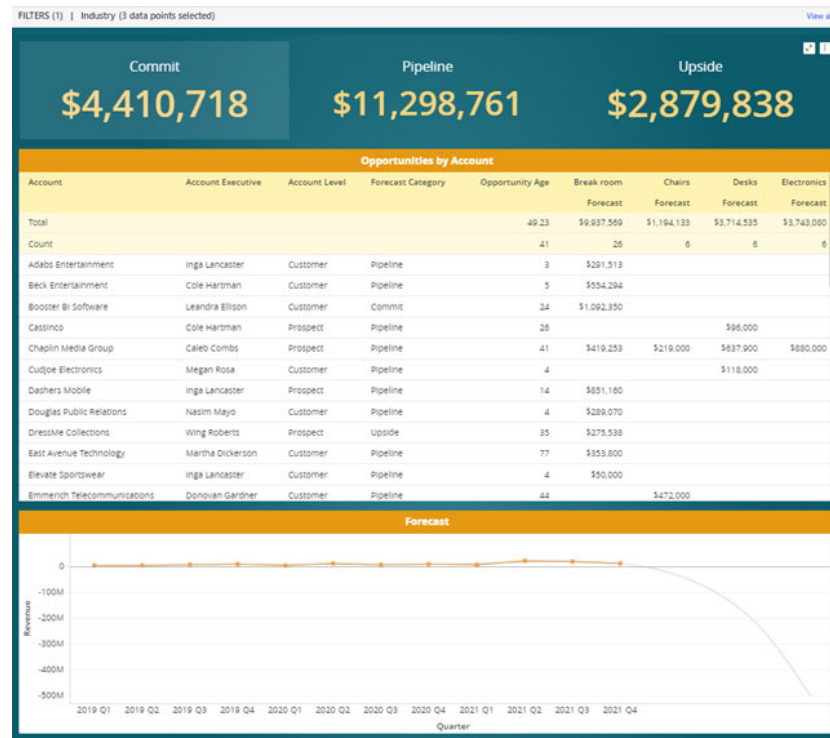
While the pipeline numbers look high, commit is relatively low, and the forecast is trending downward. What would you do to help move the deals in pipeline to commit?

Analyze opportunity age

6 This grid includes opportunity age, which can help you develop strategies to move opportunities through stages faster. You want to sort the grid by opportunity age, with the oldest opportunities first. In the grid, right-click **Opportunity Age** and then click **Sort All Values**, which sorts all values, regardless of the nested structure.
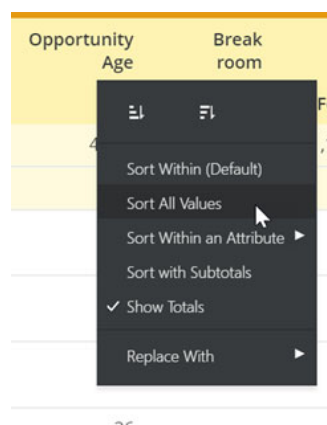
You notice deals that are over a year old, and another deal that is almost a year old. How would you work with the sales reps to close these deals?

Opportunities by Account								
Account	Account Executive	Account Level	Forecast Category	Opportunity Age	Break room	Chairs	Desks	Electronics
					Forecast	Forecast	Forecast	Forecast
Total				49.23	$9,937,569	$1,194,133	$3,714,535	$3,743,080
Count				41	26	6	6	6
FanTickets	Astra Santiago	Prospect	Commit	383				$1,248,635
Shoppers FastMart	Ora Carver	Prospect	Commit	383			$1,248,635	
Rowe Creative Group	Donovan Gardner	Customer	Pipeline	343	$91,500			

You can also select different ways to sort a grid:

- **Sort Ascending** ▤↓ : Sort the values in ascending order (A to Z or 1 to 100).

- **Sort Descending** ▤↓ : Sort the values in descending order (Z or A or 100 to 1).

- **Sort Within**: Sort within the nested attribute structure.

- **Sort Within an Attribute**: Sort within a specific level of the nested structure.

- **Sort with Subtotals**: Include the subtotal values in the sort, if subtotals are enabled.

7 Click the **Undo** icon to return to the unsorted view of the gird.