

MicroStrategy 9™

MicroStrategy Evaluation Edition Quick Start Guide

Twenty-fourth Edition, version 9.4

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Patent Information

This product is patented. One or more of the following patents may apply to the product sold herein: U.S. Patent Nos. 6,154,766, 6,173,310, 6,260,050, 6,263,051, 6,269,393, 6,279,033, 6,567,796, 6,587,547, 6,606,596, 6,658,093, 6,658,432, 6,662,195, 6,671,715, 6,691,100, 6,694,316, 6,697,808, 6,704,723, 6,741,980, 6,765,997, 6,768,788, 6,772,137, 6,788,768, 6,798,867, 6,801,910, 6,820,073, 6,829,334, 6,836,537, 6,850,603, 6,859,798, 6,873,693, 6,885,734, 6,940,953, 6,964,012, 6,977,992, 6,996,568, 6,996,569, 7,003,512, 7,010,518, 7,016,480, 7,020,251, 7,039,165, 7,082,422, 7,113,993, 7,127,403, 7,174,349, 7,181,417, 7,194,457, 7,197,461, 7,228,303, 7,260,577, 7,266,181, 7,272,212, 7,302,639, 7,324,942, 7,330,847, 7,340,040, 7,356,758, 7,356,840, 7,415,438, 7,428,302, 7,430,562, 7,440,898, 7,486,780, 7,509,671, 7,516,181, 7,559,048, 7,574,376, 7,617,201, 7,725,811, 7,801,967, 7,836,178, 7,861,161, 7,861,253, 7,881,443, 7,925,616, 7,945,584, 7,970,782, 8,005,870, 8,051,168, 8,051,369, 8,094,788, 8,130,918, 8,296,287, 8,321,411, and 8,452,755. Other patent applications are pending.

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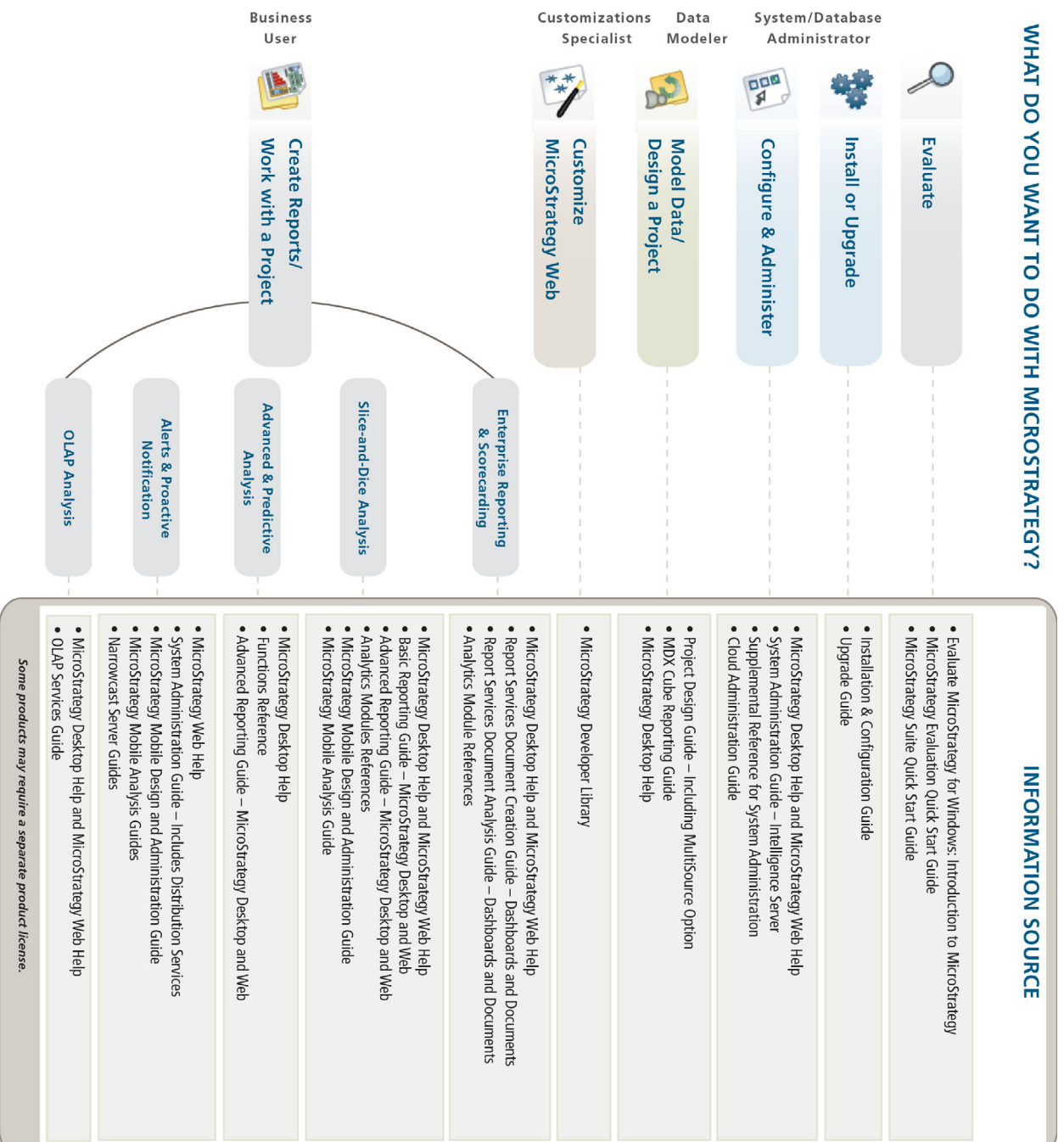
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WHAT DO YOU WANT TO DO WITH MICROSTRATEGY?

INFORMATION SOURCE



WELCOME TO MICROSTRATEGY

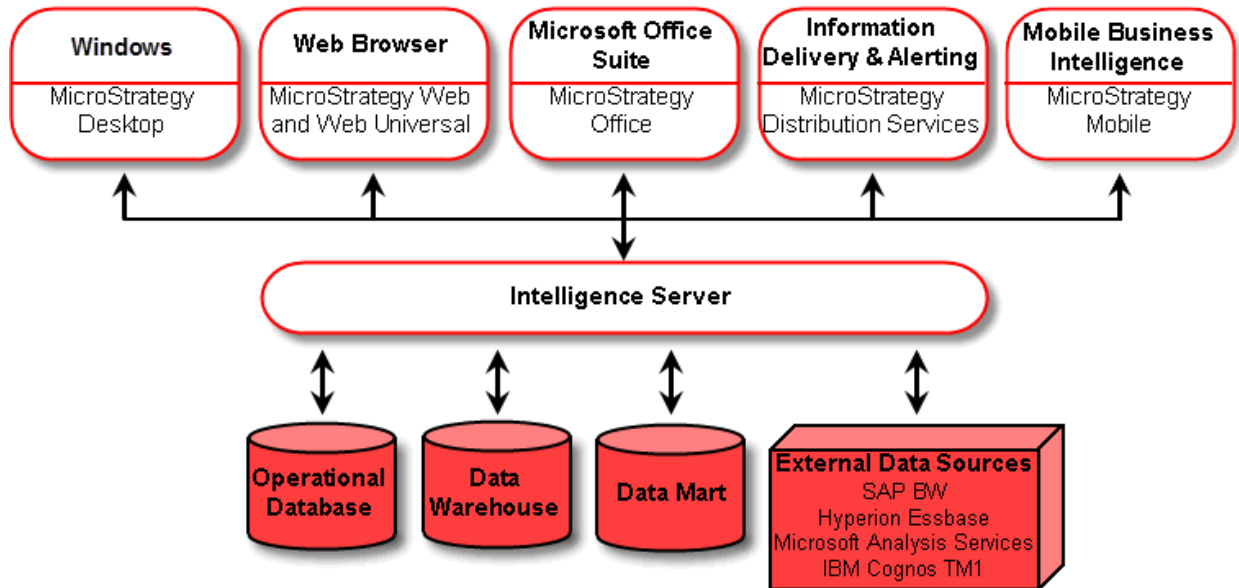
Introduction

Thank you for your interest in MicroStrategy 9 — Platform for Mobile Intelligence.

Since 1989, MicroStrategy has helped corporations transform their operational data into actionable information. MicroStrategy 9, with its industrial-strength business intelligence, helps organizations improve business performance by providing easy-to-use technology for monitoring, reporting, and analyzing all of their enterprise data. With the MicroStrategy platform, you can analyze and make decisions based upon the data within your organization's enterprise data warehouse. You can also build analytical solutions across all areas of your organization's business, including sales, marketing, operations, financial analysis, customer relationship management, and supply chain. Its intuitive user interfaces provide interactive analyses that display richly-formatted information to business users with the ability to sort, cross tabulate, drill from summarized data into transactional details, export the results and collaborate with other users, without the need to know SQL or the physical database structures.

As you work through the evaluation process described in this document, you learn about the components of the MicroStrategy platform; queries, reporting, and analysis as well as information delivery and alerting services.

MicroStrategy Desktop™, MicroStrategy Web™, MicroStrategy Office™, and MicroStrategy Mobile™ allow you to execute and manipulate reports in Microsoft® Windows, a Web browser, Microsoft Office, and mobile device such as the Apple iPad, iPhone, iPod, or a BlackBerry smartphone. These products, together with MicroStrategy Intelligence Server™, present a comprehensive solution to your business intelligence needs by providing queries across diverse interfaces, reporting, analysis, proactive information delivery, and alerting services.



To help you explore the features of the MicroStrategy platform, a sample reporting application called MicroStrategy Tutorial is provided as part of the MicroStrategy Analytics Modules. The MicroStrategy Tutorial is a MicroStrategy project and a set of demonstration applications designed to illustrate the rich functionality of the MicroStrategy platform. For more information on the MicroStrategy Tutorial, see the *MicroStrategy Project Design Guide*.

After reviewing these features, you can build your own reports and information delivery services using the MicroStrategy Tutorial database.

Also, as a part of the evaluation process, you can view business intelligence applications in a Web browser using MicroStrategy Web.



A detailed discussion of the platform architecture and the products that comprise the MicroStrategy platform can be found in the *Introduction to MicroStrategy: Evaluation Guide*. You can access this guide from the product disk using the steps in [Evaluation resources](#).

MicroStrategy evaluation products

All MicroStrategy evaluation products provide access to fully functional versions of the award-winning MicroStrategy business intelligence reporting features. The evaluations provide a special interface that walks you through a step-by-step experience. The evaluations make use of the specially designed MicroStrategy Tutorial BI application and its sample data, sample reports, and other sample reporting objects.

MicroStrategy offers the following evaluation products:

- **MicroStrategy Evaluation Edition software:** This evaluation software provides an evaluation of MicroStrategy functionality in a Microsoft Windows environment.
 - This evaluation software is available from MicroStrategy, Inc. and can be downloaded free from:
www.microstrategy.com/FreeEvalCD.asp
 - This evaluation software is designed to be used in a Windows environment.
 - For detailed instructions for this evaluation software, use the *Introduction to MicroStrategy: Evaluation Guide*.
- **MicroStrategy Evaluation Edition Virtual Appliance:** This evaluation software comes pre-installed on a virtual appliance from VMware™, Inc. The virtual appliance provides an evaluation of MicroStrategy functionality on a Red Hat Enterprise Linux operating system. By providing the evaluation software installed on a virtual appliance, this evaluation can be experienced in either a Windows or Linux environment.
 - This evaluation software installed on a virtual appliance is available from MicroStrategy, Inc. and can be downloaded free from:
www.microstrategy.com/FreeEvalCD.asp
 - The virtual appliance is designed to be used in either a Windows environment or a Linux environment, as long as the environment can support VMware software.
 - For detailed instructions for this evaluation software and the virtual appliance it is installed on, use the *Evaluate MicroStrategy for Linux: In a Windows or Linux Environment with the MicroStrategy Evaluation Edition Virtual Appliance Guide*.

- **MicroStrategy SDK Evaluation for SIs, VARs, and OEMs:** Many MicroStrategy customers want the power and sophistication of the MicroStrategy platform but have specific requirements that require a customized solution. For example, you may want to create an application that is consistent with your corporate standards, or you may want to embed MicroStrategy functionality into your existing systems. You may even want to build and resell MicroStrategy-based products or applications suited to particular industries. All of these types of customizations are possible using the MicroStrategy Software Development Kit (SDK).

To experience the SDK evaluation, see the MicroStrategy Developer Library (MSDL) section called What Can You Do With The MicroStrategy SDK. The MSDL is part of the SDK product.

Evaluation resources

The following resources are available to you to assist with your evaluation of the MicroStrategy platform:

- Free technical support for 30 days with 24 x 7 access to the MicroStrategy Knowledge Base. To access the Knowledge Base, register your copy of the Evaluation Edition to receive a user name and password. Then go to <http://www.microstrategy.com/support> and click **Knowledge Base** to log in.

If you need to continue your evaluation beyond 30 days, you can renew your evaluation license. To do this, contact MicroStrategy via telephone at 1-888-537-8135 (US) or 44(0) 208 396 0000 (worldwide) or via e-mail at info@microstrategy.com.

- Free online seminars covering various aspects of the MicroStrategy business intelligence platform. To register, visit <http://www.microstrategy.com/> and click **View Webcasts**.
- Free MicroStrategy Education instructor-led class called Introduction to Enterprise Business Intelligence for those who qualify. To register, visit <http://www.microstrategy.com/> and click **Attend Free BI Class**.
- Comprehensive online documentation, complete with a set of product manuals. The following steps describe how to access product documentation.

To access the product documentation

1 You can access the MicroStrategy Main Menu in the following ways:

- **From the disk:** Insert the disk into your disk drive and wait for the MicroStrategy Main Menu window to display automatically.



If the MicroStrategy Main Menu does not display, locate and run the `MicroStrategy.exe` file.

- **From the download site:** Download the files from the MicroStrategy download site. Locate and run the `MicroStrategy.exe` file.



Note the following:

- Contact your MicroStrategy sales representative to determine the location and login credentials for the MicroStrategy download site.
- You may have to extract the downloaded files to locate the `MicroStrategy.exe` file.

2 On the Main Menu screen, click **Documentation**.

3 Do the following:

- Click **Read Quick Start Guide** to review the *MicroStrategy Evaluation Quick Start Guide*.
- Click **Read Evaluation Guide** to review the *Introduction to MicroStrategy: Evaluation Guide*.
- Click **Read Installation and Configuration Guide** to review the *MicroStrategy Installation and Configuration Guide*.
- Click **Read Basic Reporting Guide** to review the *MicroStrategy Basic Reporting Guide*.
- Click **View ReadMe File** to review the readme files that contain the most recent information about the products since the printing of this document.

To review the product documentation, you must have Adobe® Reader installed on your machine. You can click **Install Adobe Reader** to visit the Adobe website and install Adobe Reader, if necessary.


To access the product documentation from your local machine

- 1 Install the MicroStrategy Evaluation Edition.
- 2 On the Windows **Start** menu, point to **Programs**, then **MicroStrategy Documentation**, and then choose **Product Manuals**.

Recommended evaluation process

This section describes the recommended steps to guide you through your evaluation of the MicroStrategy platform. Please use the *Introduction to MicroStrategy: Evaluation Guide* as a reference during the evaluation process. The *Introduction to MicroStrategy: Evaluation Guide* contains steps to install and configure your MicroStrategy Evaluation Edition, navigate the product demonstrations, and create a simple reporting application using the MicroStrategy platform.

The following sections in this *Quick Start Guide* outline the recommended steps that will be useful in your evaluation of the MicroStrategy platform. These steps are as follows:

- 1 [Registering the evaluation software, page 7.](#)
- 2 [Reviewing hardware and software requirements, page 7.](#)
- 3 [Installing and activating the MicroStrategy Platform, page 11.](#)
 -  Be aware of the following:
 - The license key for the Evaluation Edition expires 30 days from the time you install MicroStrategy software.
 - After your MicroStrategy installation is complete, you have seven days to activate your installation.
- 4 [Viewing reports in a Desktop application, page 13](#) (using MicroStrategy Desktop).
- 5 [Viewing reports in a Web browser, page 14](#) (using MicroStrategy Web).
- 6 [Viewing reports in Microsoft Excel, page 14](#) (using MicroStrategy Office).

- 7 [Viewing reports in Microsoft PowerPoint, page 15](#) (using MicroStrategy Office).
- 8 [Viewing reports in Microsoft Word, page 16](#) (using MicroStrategy Office).
- 9 [Viewing reports on an Apple iPhone or iPad, page 17](#) (using MicroStrategy Mobile)
- 10 [Viewing reports on a BlackBerry smartphone, page 18](#) (using MicroStrategy Mobile)
- 11 [Building a reporting application, page 19](#) (using Architect).
- 12 [Viewing business intelligence applications, page 19](#) (using MicroStrategy Web and Analytics Modules).

Registering the evaluation software

You need a license key to install the MicroStrategy platform products. Please register your copy of the MicroStrategy Evaluation Edition by visiting <http://www.microstrategy.com/LicenseKey>.

At the online registration site, you are asked to enter the e-mail address you used to request this evaluation software. If your e-mail address cannot be found in the records, you may be asked to fill out a short form. You also need a promotion code to complete the registration process. This promotion code can be found on the inside of the evaluation disk mailer. If you downloaded the Evaluation Edition, you should have received the promotion code in the welcome communication from MicroStrategy.



If you do not have a promotion code, contact MicroStrategy Technical Support. You can find contact information for MicroStrategy Technical Support at the end of this guide.

The license key to install the MicroStrategy platform is sent to you at the e-mail address you specify at the registration site.

Reviewing hardware and software requirements

For evaluation purposes, install the entire MicroStrategy platform on a single computer.

Although you will run the entire MicroStrategy platform on one machine for this evaluation, you should never do this in a production environment. In production, you should distribute the products across multiple machines that are networked together. For information about sizing a production installation, refer to the *Installation Considerations* section in the *MicroStrategy Installation and Configuration Guide*.

For the most up-to-date requirements, view the ReadMe file. To access this file, from the Windows **Start** menu point to **Programs**, then **MicroStrategy Documentation**, then click **MicroStrategy ReadMe**.

Hardware requirements

For the evaluation, it is assumed that one to four users are using the system.

- Processor: x86 or x64-compatible
- Memory (RAM): 4 GB or more
- Minimum storage space required: Three times the amount of RAM available to Intelligence Server. For example, an Intelligence Server that is provided 4 GB of RAM requires 12 GB of hard drive space.



Regardless of where you choose to install the Evaluation Edition, you must have at least 1 GB of free space on your C: drive for a set of system files that MicroStrategy installs. For example, even if you choose to install the entire Evaluation Edition on your D: drive, you will still have 1 GB of system files installed on your C: drive. This storage requirement is in addition to the minimum storage space described in the list above.

For a list of hardware requirements necessary to evaluate MicroStrategy Mobile, refer to the Certified and Supported Configurations section on the MicroStrategy Mobile page of the MicroStrategy Readme.

Software requirements

- Microsoft Windows operating system:
 - Windows 2003 Standard Edition SP2 (on x86 or x64)
 - Windows 2003 Enterprise Edition SP2 (on x86 or x64)
 - Windows 2003 Standard Edition R2 SP2 (on x86 or x64)
 - Windows 2003 Enterprise Edition R2 SP2 (on x86 or x64)

- Windows Vista Business Edition SP2 (on x86 or x64)
- Windows Vista Enterprise Edition SP2 (on x86 or x64)
- Windows 7 Professional Edition SP1 (on x86 or x64)
- Windows 7 Enterprise Edition SP1 (on x86 or x64)
- Windows 8 all editions (on x86 or x64)
- Windows 2008 Standard Edition SP2 (on x64)
- Windows 2008 Enterprise Edition SP2 (on x64)
- Windows 2008 Standard Edition R2 SP1 (on x64)
- Windows 2008 Enterprise Edition R2 SP1 (on x64)
- Windows 2012 Standard (on x64)



It is recommended that, if you install MicroStrategy server products on Windows Vista, Windows 7, or Windows 8, you do so for evaluation purposes only. For a production environment, install MicroStrategy server products on one of the other MicroStrategy-certified operating systems.

- Windows fonts display set to small fonts (96 dpi)
- Microsoft Internet Information Services (IIS) version 6.x, 7.0.x, 7.5.x, or 8.x
- Microsoft Internet Explorer version 7.x, 8.x, 9.x, or 10.x
- Microsoft .NET Framework 4.0 or 4.5. This must be installed prior to installing MicroStrategy.
- Display set to 16 bit colors or higher
- Adobe Reader version 10.x or 11.x
- Adobe Flash Player version 10.1.x, 10.3.x, or 11.x
- For evaluating MicroStrategy Office, Microsoft Office (Microsoft Excel, Microsoft PowerPoint, or Microsoft Word):
 - Microsoft Office 2003 SP3
 - Microsoft Office 2007 SP2
 - Microsoft Office 2010 SP1
 - Microsoft Office 2013

- Microsoft Office for Windows RT
- For evaluating MicroStrategy Mobile:
 - MicroStrategy Mobile for BlackBerry:
 - BlackBerry Operating System version 5.x, 6.x, or 7.x
 - BlackBerry Bold 9900 Series, Torch 9800 Series, Bold 9790, Bold 9700, Style 9670, Bold 9650, Tour 9630, Curve 3G 9300 Series, Pearl 3G 9100 Series, Bold 9000 Series, Curve 8900 Series, 8800 Series, 8700 Series, Curve 8500 Series, Curve 8300 Series, Pearl Flip 8200 Series, Pearl 8100 Series, 7200 Series, or 7100 Series devices.
 - MicroStrategy Mobile for iPhone:
 - iPhone iOS 5.0.x, 5.1.x, 6.0x, or 6.1.x
 - iPhone 5, iPhone 4S, iPhone 4, iPhone 3GS, or iPod Touch devices
 - MicroStrategy Mobile for iPad:
 - iPad iOS 5.0.x, 5.1.x, 6.0.x, or 6.1.x
 - iPad Wi-Fi or iPad Wi-Fi + 3G devices
 - iPad 2 Wi-Fi or iPad 2 Wi-Fi + 3G devices
 - iPad 3 Wi-Fi or iPad 3 Wi-Fi + Cellular devices (New iPad)
 - iPad 4 Wi-Fi or iPad 4 Wi-Fi + Cellular devices (iPad with Retina display)
 - MicroStrategy Mobile for Android:
 - Android OS 4.x
 - Acer Iconia Tab A100, Acer Iconia Tab A500, ASUS Nexus 7 Wi-Fi, ASUS Nexus 7 3G, ASUS Transformer, ASUS Transformer Prime, HTC One S T-Mobile version, HTC One X International version, HTC Vivid, LG Nexus 4 International version, LG Optimus G AT&T version, LG Spectrum, LG Thrill, Motorola Atrix 2, Motorola Droid 4, Motorola Droid Bionic, Motorola Droid Razr and Razr MAXX, Motorola Xoom 3G tablet, Motorola Xoom Wi-Fi, Motorola XY Board 10.1 LTE, Samsung Galaxy Nexus GSM version, Samsung Galaxy Nexus Verizon version, Samsung Galaxy Note International version, Samsung Galaxy Note 10.1 Wi-Fi, Samsung Galaxy Note 2 International version, Samsung Galaxy S2 AT&T version, Samsung Galaxy S2 T-Mobile version, Samsung Galaxy S2 Skyrocket AT&T version, Samsung Galaxy S3 AT&T



version, Samsung Galaxy S3 International version, Samsung Galaxy S3 Verizon version, Samsung Galaxy Tab 10.1 Wi-Fi, Samsung Galaxy Tab 2 7.0 Wi-Fi, Samsung Galaxy Tab 7 Plus, Samsung Nexus 10, Samsung Nexus S, Samsung Nexus S 4G, Sony Tablet S, Sony Xperia Arc International version, Sony Xperia S International version, or Toshiba Thrive

- Android phones must use a high or extra high pixel density screen, which is 240 PPI and above
- Android tablets must use a medium, high, or extra high pixel density screen, which is 160 PPI and above

Installing and activating the MicroStrategy Platform

For complete details to install MicroStrategy software, see the *MicroStrategy Installation and Configuration Guide*.

To install the MicroStrategy platform

- 1 Log in to your computer using an account with administrator privileges.
- 2 You can access the MicroStrategy Main Menu in the following ways:
 - **From the disk:** Insert the disk into your disk drive and wait for the MicroStrategy Main Menu window to display automatically.
 -  If the MicroStrategy Main Menu does not display, locate and run the `MicroStrategy.exe` file.
 - **From the download site:** Download the files from the MicroStrategy download site. Locate and run the `MicroStrategy.exe` file.
 -  Note the following:
 - Contact your MicroStrategy sales representative to determine the location and login credentials for the MicroStrategy download site.
 - You may have to extract the downloaded files to locate the `MicroStrategy.exe` file.
- 3 On the Main Menu screen, click **Evaluate Software**.

- 4 Click **Install MicroStrategy Platform** and follow the installation wizard, using the following guidelines:
 - You need the license key you received upon registering the Evaluation Edition to install the products. The license key for the Evaluation Edition expires 30 days from the time you install MicroStrategy software.
 - Accept the default options presented by the installation wizard. Detailed installation and configuration instructions can be found in the chapter *Installing the MicroStrategy Evaluation Edition* in the *Introduction to MicroStrategy: Evaluation Guide*.
- 5 Restart the computer after completing the installation.



After your MicroStrategy installation is complete, you have seven days to activate your installation. Before you activate your installation you must request an Activation Code from MicroStrategy. You can complete this request at either of the following times:

- When you install MicroStrategy, using the MicroStrategy Installation Wizard. For details to activate your installation using the Installation Wizard, see *Install the MicroStrategy Evaluation Edition* in the *Introduction to MicroStrategy: Evaluation Guide*.
- After the installation, using MicroStrategy License Manager. For details to activate your installation using License Manager, from your machine's **Start** menu, select **MicroStrategy Tools**, then select **License Manager**. On the **License Administration** tab, click **Help** for steps to complete the activation.

When you restart the computer where the evaluation software is installed, the Welcome screen opens. This screen is designed to guide you through the evaluation process.



The Welcome screen appears only once after the software is installed. You can access the Welcome screen at any time from the Start menu by pointing to **Programs**, then to **MicroStrategy Tools**, and then choosing **Welcome Screen**.

For complete details to install MicroStrategy software, see the *MicroStrategy Installation and Configuration Guide*.

Viewing reports in a Desktop application

In this step, you use MicroStrategy Desktop to execute reports against MicroStrategy Tutorial (a Microsoft Access database).

To use MicroStrategy Desktop

- 1 Click **View reports in a Desktop application** on the Welcome screen. If the Welcome screen is not open, from the Start menu, point to **Programs**, then **MicroStrategy Tools**, and then choose **Welcome Screen**.
- 2 You are required to log in to access the MicroStrategy Tutorial. A dialog box opens advising you about this authentication information. Click **Continue** to proceed. You can log in using either the **User**, **Developer**, or **Administrator** user name. Each login ID grants you a specific level of access to the MicroStrategy platform.

If you log in as **User**, you can perform most functions in MicroStrategy; these functions include creating and executing reports.

If you log in as **Developer**, you can view objects that are required to develop reports.

If you use the **Administrator** login ID, you are granted “super user” access, which includes the ability to manipulate schema objects such as attributes. However, be careful if you log in as **Administrator**; you bypass the following tutorial steps and permanently lose any objects you delete.

To follow along with this tutorial, use the **User** login ID to log in. Leave the password blank and click **OK**.

- 3 The User Homepage opens, where you can learn how to access and manipulate reports, and create new reports using MicroStrategy Desktop. Follow the recommended steps on the User Homepage.




For detailed documentation of each step, refer to *Viewing Reports in a Desktop Application* in the *Introduction to MicroStrategy: Evaluation Guide*.

Viewing reports in a Web browser

In this step, you use a Web browser to execute reports against the Tutorial database using MicroStrategy Web. Most of the reports you execute in this step are the same reports you saw in the Windows interface.

To access reports using a Web browser

- 1 Ensure that the World Wide Web Publishing service and MicroStrategy Intelligence Server services are running on your system. For more information about checking the status of these services, see *Troubleshooting the Evaluation Edition* in the *Introduction to MicroStrategy: Evaluation Guide*.
 - 2 On the Welcome screen, click **View reports in a Web browser**. If the Welcome screen is not open, from the Start menu, point to **Programs**, then **MicroStrategy Tools**, and then choose **Welcome Screen**.
 - 3 You are required to log in to access the MicroStrategy Tutorial. Log in using the login ID **User** and leave the password blank.
 - 4 The User Homepage opens with instructions on how to proceed with the evaluation. These steps are similar to the ones you saw in the Windows interface.
-  For a detailed explanation of each step in the evaluation process, refer to *Viewing Reports in a Web Browser* in the *Introduction to MicroStrategy: Evaluation Guide*.

Viewing reports in Microsoft Excel

In this step, you learn about MicroStrategy Office, which allows you to integrate MicroStrategy functionality with Microsoft® Office products like Excel, PowerPoint, and Word. You can execute MicroStrategy reports directly from the Microsoft Office applications, refresh their data, format the results, and save them for offline analysis.

To learn how to use MicroStrategy Office with Microsoft Excel, perform the following steps.

To access reports in Microsoft Excel

- 1 Ensure that the appropriate version of Microsoft Excel is installed on your computer. For detailed version requirement information, see [Software requirements, page 8](#).
- 2 Click **View reports in Microsoft Excel** on the Welcome screen. If the Welcome screen is not open, from the Start menu, point to **Programs**, then **MicroStrategy Tools**, and then choose **Welcome Screen**.
- 3 An Excel workbook opens. You can learn how to perform a one-click refresh of MicroStrategy reports in Excel and how to add reports to Excel worksheets by following the detailed instructions displayed on the worksheets.



For a detailed explanation of each step in the evaluation process, refer to *Viewing Reports in Microsoft Excel, PowerPoint, and Word* in the *Introduction to MicroStrategy: Evaluation Guide*.

Viewing reports in Microsoft PowerPoint

In this step, you learn about MicroStrategy Office, which allows you to integrate MicroStrategy functionality with Microsoft Office products like Excel, PowerPoint, and Word. You can execute MicroStrategy reports directly from the Microsoft Office applications, refresh their data, format the results, and save them to be used for offline analysis.

To learn how to use MicroStrategy Office with Microsoft PowerPoint, perform the following steps.

To access reports in Microsoft PowerPoint

- 1 Ensure that the appropriate version of Microsoft PowerPoint is installed on your computer. For detailed version requirement information, see [Software requirements, page 8](#).
- 2 Click **View reports in Microsoft PowerPoint** on the Welcome screen. If the Welcome screen is not open, from the Start menu, point to **Programs**, then **MicroStrategy Tools**, and then choose **Welcome Screen**.

- 3 A PowerPoint presentation opens. You can learn how to perform a one-click refresh of MicroStrategy reports in PowerPoint and how to add reports to PowerPoint slides by following the detailed instructions displayed on the slides.



For a detailed explanation of each step in the evaluation process, refer to *Viewing Reports in Microsoft Excel, PowerPoint, and Word* in the *Introduction to MicroStrategy: Evaluation Guide*.

Viewing reports in Microsoft Word

In this step, you learn about MicroStrategy Office, which allows you to integrate MicroStrategy functionality with Microsoft Office products like Excel, PowerPoint, and Word. You can execute MicroStrategy reports directly from the Microsoft Office applications, refresh their data, format the results, and save them to be used for offline analysis.

To learn how to use MicroStrategy Office with Microsoft Word, perform the following steps.

To access reports in Microsoft Word

- 1 Ensure that the appropriate version of Microsoft Word is installed on your computer. For detailed version requirement information, see [Software requirements, page 8](#).
- 2 Click **View reports in Microsoft Word** on the Welcome screen. If the Welcome screen is not open, from the Start menu, point to **Programs**, then **MicroStrategy Tools**, and then choose **Welcome Screen**.
- 3 A Word document opens. You can learn how to perform a one-click refresh of MicroStrategy reports in Word and how to add reports to Word documents by following the detailed instructions displayed on the document.



For a detailed explanation of each step in the evaluation process, refer to *Viewing Reports in Microsoft Excel, PowerPoint, and Word* in the *Introduction to MicroStrategy: Evaluation Guide*.

Viewing reports on an Apple iPhone or iPad

You can learn about MicroStrategy Mobile for the iPhone and iPad, which allows you to receive reports and documents on your Apple iPhone and iPad and analyze the data in the reports and documents in a variety of ways.

With MicroStrategy Mobile, you and other business users receive the same reports and documents on your Apple iPhones and iPads as you do in MicroStrategy Web, MicroStrategy Office, or MicroStrategy Desktop. You can then analyze the reports and documents on your mobile device by sorting data, repositioning objects, grouping data by page, and more.

To learn how to use MicroStrategy Mobile, perform the following steps.

To view reports in MicroStrategy Mobile for iPhone and iPad

- 1 On the Welcome screen, click **View reports on iPhone and iPad**. If the Welcome screen is not open, from the **Start** menu, point to **Programs**, then **MicroStrategy Tools**, and then choose **Welcome Screen**.

- 2 The Home page opens with instructions on how to proceed.



For a detailed explanation of each step in the evaluation process, refer to the *Viewing Reports on a Mobile Device* chapter in the *Introduction to MicroStrategy: Evaluation Guide*.

Viewing reports on an Android phone or tablet

You can learn about MicroStrategy Mobile Universal for the Android, which allows you to receive reports and documents on your Android phone or tablet and analyze the data in the reports and documents in a variety of ways.

With MicroStrategy Mobile Universal, you and other business users receive the same reports and documents on your Android device as you do in MicroStrategy Web, MicroStrategy Office, or MicroStrategy Desktop. You can then analyze the reports and documents on your mobile device by sorting data, repositioning objects, grouping data by page, and more.

To learn how to use MicroStrategy Mobile Universal, perform the following steps.

To view reports in MicroStrategy Mobile Universal for Android

- 1 On the Welcome screen, click **View reports on Android**. If the Welcome screen is not open, from the **Start** menu, point to **Programs**, then **MicroStrategy Tools**, and then choose **Welcome Screen**.
- 2 The Home page opens with instructions on how to proceed.



For a detailed explanation of each step in the evaluation process, refer to the *Viewing Reports on a Mobile Device* chapter in the *Introduction to MicroStrategy: Evaluation Guide*.

Viewing reports on a BlackBerry smartphone

In this step, you learn about MicroStrategy Mobile for the BlackBerry smartphone, which allows you to receive reports and documents on your BlackBerry smartphone and analyze the data in the reports and documents in a variety of ways.

With MicroStrategy Mobile, you and other business users receive the same reports and documents on your BlackBerry smartphones as you do in MicroStrategy Web, MicroStrategy Office, or MicroStrategy Desktop. You can then analyze the reports and documents on your mobile device by sorting data, repositioning objects, grouping data by page, and more.

To learn how to use MicroStrategy Mobile, perform the following steps.

To view reports in MicroStrategy Mobile for BlackBerry

- 1 On the Welcome screen, click **View reports on a BlackBerry smartphone**. If the Welcome screen is not open, from the Start menu, point to **Programs**, then **MicroStrategy Tools**, and then choose **Welcome Screen**.
- 2 The Home page opens with instructions on how to proceed.



For a detailed explanation of each step in the evaluation process, refer to the *Viewing Reports on a Mobile Device* chapter in the *Introduction to MicroStrategy: Evaluation Guide*.

Building a reporting application

In this step, you learn how to access MicroStrategy Architect, a tool you can use to create your own reporting application using MicroStrategy Tutorial data.

To launch Architect

- 1 Click **Build a reporting application** on the Welcome screen. If the Welcome screen is not open, from the Start menu, point to **Programs**, then **MicroStrategy Tools**, and then choose **Welcome Screen**.
- 2 In the Folder List on the left, expand **My First Project**.
- 3 Right-click **My First Project** and select **Architect**. Architect opens. You can learn how to build a reporting application by following the recommended steps on the User Homepage.



For detailed information, refer to *Building a Reporting Application* in the *Introduction to MicroStrategy: Evaluation Guide*.

Viewing business intelligence applications

In this step, you can view a variety of business intelligence applications in a Web browser using MicroStrategy Web. The business intelligence applications you can view include the Human Resources Analysis Module, Customer Analysis Module, Financial Reporting Analysis Module, Sales Force Analysis Module, and the Sales and Distribution Analysis Module. Refer to *Viewing Business Intelligence Applications* in the *Introduction to MicroStrategy: Evaluation Guide* to learn more.



It is recommended that you complete the entire recommended evaluation process prior to exploring the Analytics Modules or business intelligence applications.

To view business intelligence applications

- 1 Click **View business intelligence applications** on the Welcome screen. If the Welcome screen is not open, from the Start menu, point to

Programs, then **MicroStrategy Tools**, and then choose **Welcome Screen**.

- 2 Log in as User with no password and click **Login**.
- 3 The User homepage opens. You can view the various business applications by following the recommended steps on the User Homepage.



For detailed information, refer to *Viewing Business Intelligence Applications* in the *Introduction to MicroStrategy: Evaluation Guide*.

Next steps

If you have completed the steps in the recommended evaluation process, you have learned quite a bit about the query, reporting, analysis, information delivery and alerting functionality available through the MicroStrategy platform.

From here, you can do any of the following things:

- You can also view a variety of business intelligence applications in a Windows interface using MicroStrategy Desktop. These business intelligence applications are the same ones you explored in the **View business intelligence applications** section. Refer to *Viewing Business Intelligence Applications* in the *Introduction to MicroStrategy: Evaluation Guide* to learn more.



It is recommended that you complete the entire recommended evaluation process prior to exploring the Analytics Modules or business intelligence applications.

- MicroStrategy Web Universal features the same powerful functionality you saw in MicroStrategy Web with the added benefit of working with a wide variety of operating systems, application servers, Web servers, and Web browsers. If you wish to evaluate MicroStrategy Web Universal, refer to *Viewing Reports with MicroStrategy Web Universal* in the *Introduction to MicroStrategy: Evaluation Guide*.



MicroStrategy Web Universal for Windows can be installed from the disk within your software package, but it requires a separate license key for installation. If you need to evaluate MicroStrategy Web Universal for Windows or for non-Windows platforms, contact your MicroStrategy account executive. If you are not

working with a particular account executive, please contact MicroStrategy via e-mail at info@microstrategy.com or by telephone at 1-888-537-8135 (US) or +44 (0) 208 396 0000 (Worldwide).

Consulting

MicroStrategy Consulting Services provides proven methods for delivering leading-edge technology solutions. Offerings include complex security architecture designs, performance and tuning, project and testing strategies and recommendations, strategic planning, and more. For a detailed description of consulting offerings, visit <http://www.microstrategy.com/Services>.

International support

MicroStrategy supports several locales. Support for a locale typically includes native database and operating system support, support for date formats, numeric formats, currency symbols, and availability of translated interfaces and certain documentation.

MicroStrategy is certified in homogeneous configurations (where all the components lie in the same locale) in the following languages—English (US), French, German, Italian, Japanese, Korean, Portuguese (Brazilian), Spanish, Chinese (Simplified), Chinese (Traditional), Danish, and Swedish. A translated user interface is available in each of the above languages. For information on specific languages supported by individual MicroStrategy system components, see the MicroStrategy readme.

MicroStrategy also provides limited support for heterogeneous configurations (where some of the components may lie in different locales). Please contact MicroStrategy Technical Support for more details.

Technical Support

If you have questions about a specific MicroStrategy product, you should:

- 1 Consult the product guides, Help, and readme files. Locations to access each are described above.

- 2 Consult the MicroStrategy Knowledge Base online at <https://resource.microstrategy.com/support>.



A technical administrator in your organization may be able to help you resolve your issues immediately.

- 3 If the resources listed in the steps above do not provide a solution, contact MicroStrategy Technical Support directly. To ensure the most productive relationship with MicroStrategy Technical Support, review the Policies and Procedures document in your language, posted at <http://www.microstrategy.com/Support/Policies>. Refer to the terms of your purchase agreement to determine the type of support available to you.

MicroStrategy Technical Support can be contacted by your company's Support Liaison. A Support Liaison is a person whom your company has designated as a point-of-contact with MicroStrategy's support personnel. All customer inquiries and case communications must come through these named individuals. Your company may designate two employees to serve as their Support Liaisons, and can request to change their Support Liaisons two times per year with prior written notice to MicroStrategy Technical Support.

It is recommended that you designate Support Liaisons who have MicroStrategy Administrator privileges. This can eliminate security conflicts and improve case resolution time. When troubleshooting and researching issues, MicroStrategy Technical Support personnel may make recommendations that require administrative privileges within MicroStrategy, or that assume that the designated Support Liaison has a security level that permits them to fully manipulate the MicroStrategy projects and has access to potentially sensitive project data such as security filter definitions.

Ensure issues are resolved quickly

Before logging a case with MicroStrategy Technical Support, the Support Liaison may follow the steps below to ensure that issues are resolved quickly:

- 1 Verify that the issue is with MicroStrategy software and not a third party software.
- 2 Verify that the system is using a currently supported version of MicroStrategy software by checking the Product Support Expiration Schedule at <http://www.microstrategy.com/Support/Expiration.asp>.
- 3 Attempt to reproduce the issue and determine whether it occurs consistently.

- 4 Minimize the complexity of the system or project object definition to isolate the cause.
- 5 Determine whether the issue occurs on a local machine or on multiple machines in the customer environment.
- 6 Discuss the issue with other users by posting a question about the issue on the MicroStrategy Customer Forum at <https://resource.microstrategy.com/forum/>.

The following table shows where, when, and how to contact MicroStrategy Technical Support. If your Support Liaison is unable to reach MicroStrategy Technical Support, they can send an email or log a case using the Online Support Interface. The individual Technical Support Centers are closed on certain public holidays.

North America	Email: support@microstrategy.com Web: https://resource.microstrategy.com/support
EMEA: <ul style="list-style-type: none">• Europe• The Middle East• Africa	Email: eurosupp@microstrategy.com Web: https://resource.microstrategy.com/support
Asia Pacific	Email: apsupport@microstrategy.com Web: https://resource.microstrategy.com/support
Latin America	Email: latamsupport@microstrategy.com Web: https://resource.microstrategy.com/support

Support Liaisons should contact the Technical Support Center from which they obtained their MicroStrategy software licenses or the Technical Support Center to which they have been designated.

Required information when contacting MicroStrategy

When contacting MicroStrategy Technical Support, please provide the following information:

- Personal information:
 - Name (first and last)
 - Company and customer site (if different from company)
 - Contact information (phone and fax numbers, e-mail addresses)

- Case details:
 - Configuration information, including MicroStrategy software product(s) and versions
 - Full description of the case including symptoms, error messages(s), and steps taken to troubleshoot the case thus far
- Business/system impact

If this is the Support Liaison's first inquiry, they should also be prepared to provide the following:

- Street address
- Phone number
- Fax number
- Email address

To help the Technical Support representative resolve the problem promptly and effectively, be prepared to provide the following additional information:

- Case number: Please keep a record of the number assigned to each case logged with MicroStrategy Technical Support, and be ready to provide it when inquiring about an existing case
- Software version and product registration numbers of the MicroStrategy software products you are using
- Case description:
 - What causes the condition to occur?
 - Does the condition occur sporadically or each time a certain action is performed?
 - Does the condition occur on all machines or just on one?
 - When did the condition first occur?
 - What events took place immediately prior to the first occurrence of the condition (for example, a major database load, a database move, or a software upgrade)?
 - If there was an error message, what was its exact wording?
 - What steps have you taken to isolate and resolve the issue? What were the results?

- System configuration (the information needed depends on the nature of the problem; not all items listed below may be necessary):
 - Computer hardware specifications (processor speed, RAM, disk space, and so on)
 - Network protocol used
 - ODBC driver manufacturer and version
 - Database gateway software version
 - (For MicroStrategy Web-related problems) browser manufacturer and version
 - (For MicroStrategy Web-related problems) Web server manufacturer and version

If the issue requires additional investigation or testing, the Support Liaison and the MicroStrategy Technical Support representative should agree on certain action items to be performed. The Support Liaison should perform any agreed-upon actions before contacting MicroStrategy Technical Support again regarding the issue. If the Technical Support representative is responsible for an action item, the Support Liaison may call MicroStrategy Technical Support at any time to inquire about the status of the issue.

Feedback

Please send any comments or suggestions about user documentation for MicroStrategy products to:

`documentationfeedback@microstrategy.com`

Send suggestions for product enhancements to:

`support@microstrategy.com`

When you provide feedback to us, please include the name and version of the products you are currently using. Your feedback is important to us as we prepare for future releases.

