



MicroStrategy Desktop

Quick Start Guide

MicroStrategy Desktop is designed to enable business professionals like you to explore data, simply and without needing direct support from IT.

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Import data from a file

MicroStrategy Desktop lets you import and report on personalized data from various types of files, including Excel spreadsheets, comma separated values (CSV) files, tab separated values (TSV) files, and printer (PRN) text files. For a list of other data sources, see [Data sources for data importing, page 4](#).

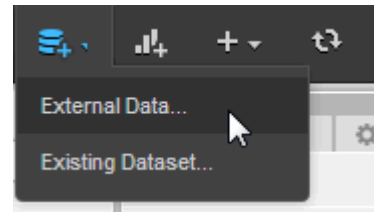
1 Get started

Double-click the **MicroStrategy Desktop** icon.



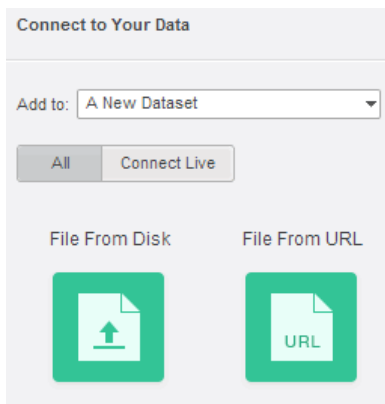
2 Import a new set of data

Click **Add Data** in the toolbar, and select **External Data**.



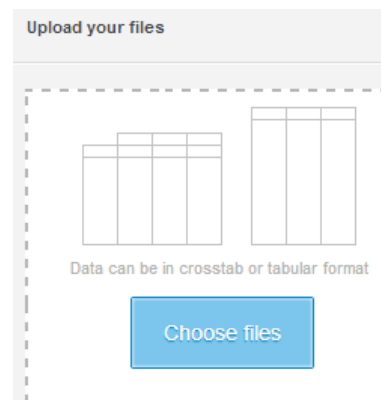
3 Select the type of data source

For this example, select **File from Disk**.



4 Select your data file

To locate a file on your computer, click **Choose Files**.

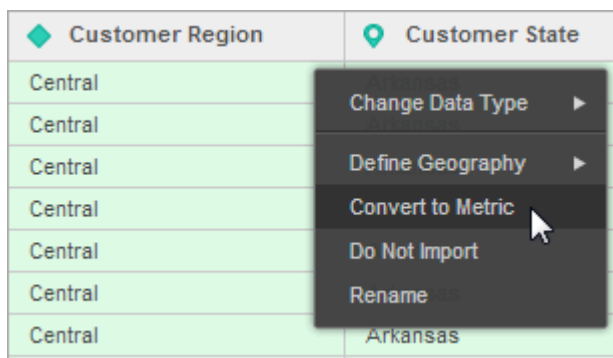


Navigate to the file, select it, and click **Open**. Then click **Prepare Data**.

5 Preview your data and assign data types

A selection of your data is displayed, so that you can preview and modify the data before it is imported. Each column of data is automatically identified as a business concept, such as Product or Employee (called an *attribute*), or a business measure, such as Revenue or Profit (called a *metric*).

You can change these determinations for your data. Right-click the header of the data column, and select either **Convert to Attribute** or **Convert to Metric**.



Customer Region	Customer State
Central	
Central	
Central	
Central	
Central	
Central	
Central	Arkansas

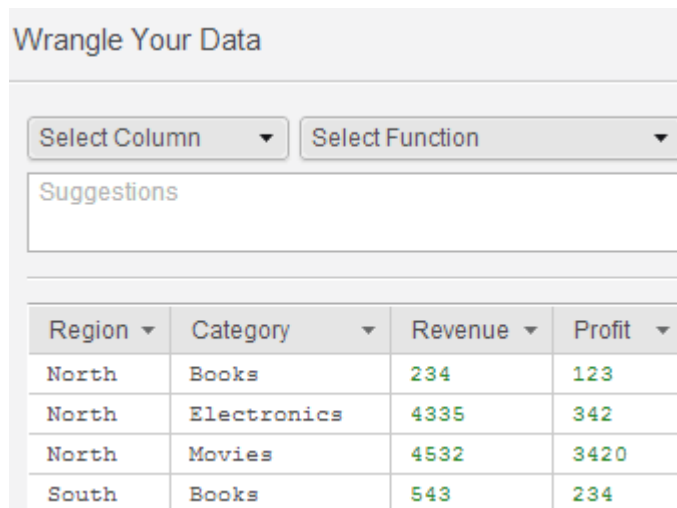
The context menu is open over the 'Customer State' header, showing options: Change Data Type, Define Geography, Convert to Metric (highlighted), Do Not Import, Rename, and Arkansas.

For steps for additional tasks, such as preparing your data to be displayed on a map, click the ? (Help) button.

6 Evaluate and transform your data

You can explore your data to evaluate its quality and usability, and then improve its quality (also known as data wrangling) before importing it. For example, you can remove white space, filter your data, delete duplicate rows or cells, find and replace data, concatenate columns, and so on.

To evaluate and transform your data, click **Wrangle**. For steps, click the ? (Help) button.



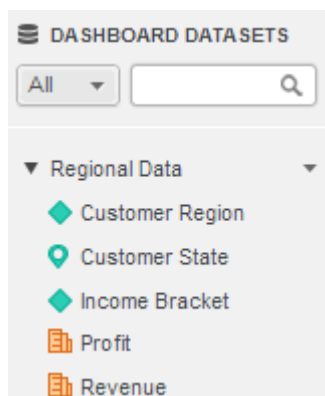
The 'Wrangle Your Data' interface shows a 'Select Column' dropdown and a 'Select Function' dropdown. Below them is a 'Suggestions' box. At the bottom, a table displays data with columns for Region, Category, Revenue, and Profit.

Region	Category	Revenue	Profit
North	Books	234	123
North	Electronics	4335	342
North	Movies	4532	3420
South	Books	543	234

To continue importing your data, click **OK**.

7 Create the dashboard with the imported data

Click **Finish**. A new, blank dashboard is created with your data as a dataset.



The 'DASHBOARD DATASETS' panel shows a search bar and a list of datasets under the 'Regional Data' category. The datasets listed are Customer Region, Customer State, Income Bracket, Profit, and Revenue.

Next: Display your data in a visualization on your new dashboard. See [Visualize your data, page 5](#).



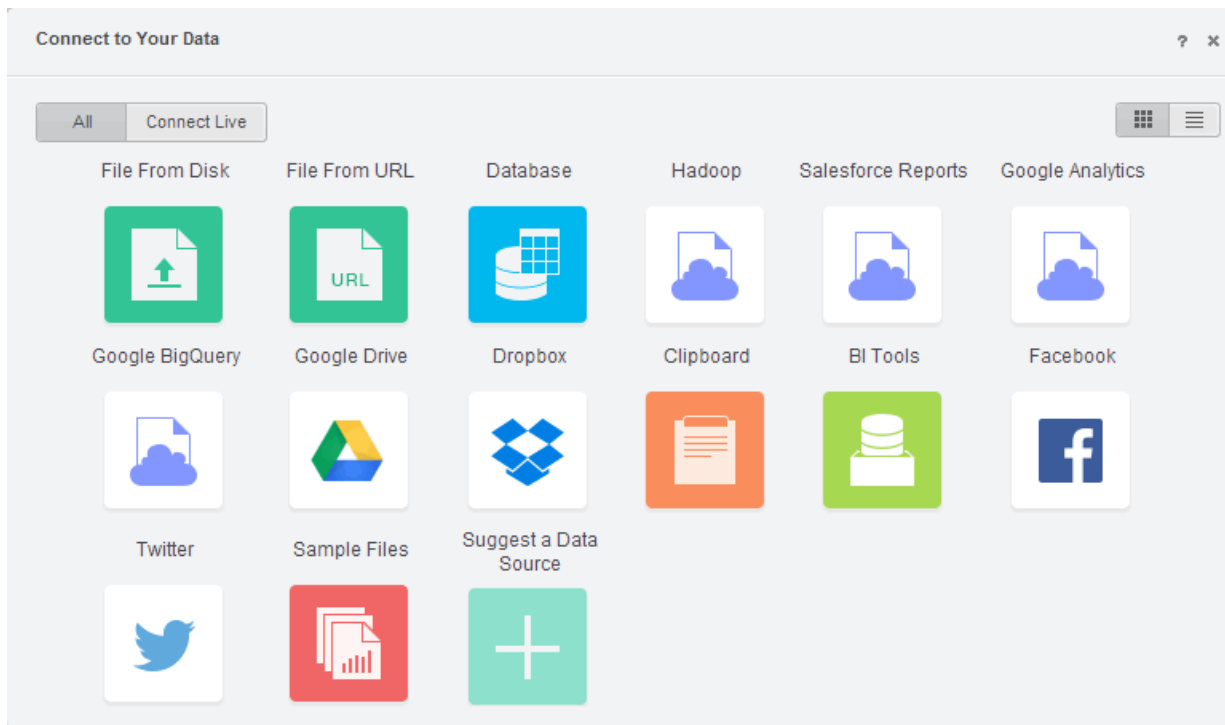
Data sources for data importing

You can import data into MicroStrategy Desktop:

- From many different data sources, such as an Excel file or a database
- By using the results of a custom database query
- From a MicroStrategy server by opening a dashboard or importing data

You can also combine different types of data sources in a single dataset. For example, you can import an Excel spreadsheet and then import a table from a relational database, and combine them into a single dataset.

For detailed steps to import data, click the ? (Help) button on the Connect to Your Data page.



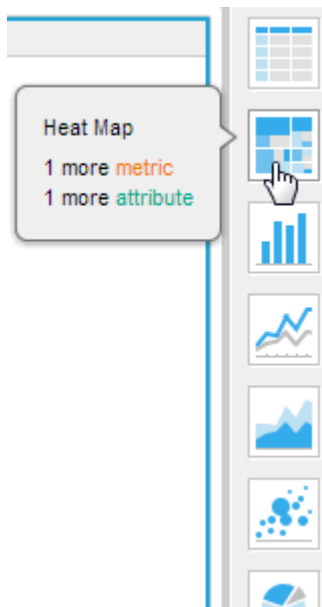


Visualize your data

After you import your data, you can quickly create an interactive, presentation-quality display, or dashboard, to explore and understand your data. You add visual representations of your data, called visualizations, to make your data easier to interpret. When you create a new dashboard, a blank visualization is automatically added to the dashboard.

1 Select the type of visualization

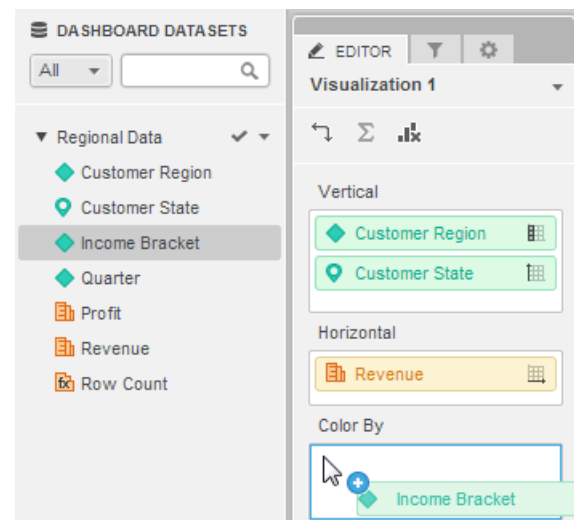
In your new dashboard, on the Visualization Gallery, click the type of visualization that you want to add. To view the visualization's data requirements, hover the cursor over the icon of a visualization.



For example images of each visualization, see the [Visualization gallery, page 6](#).

2 Display data on your visualization


To display data on the visualization, drag and drop attributes and metrics from the Dashboard Datasets panel onto different areas of the Editor panel.




Depending on the type of visualization, you can display your data with different colors, shapes, sizes, and more. For details and steps, click the **Properties** icon, click the arrow icon next to the visualization name, and select **Help**.

3 Add another visualization

Add a second visualization to explore your data in another way.

Click **Insert Visualization**  on the toolbar. Click a visualization type on the Visualization Gallery. Drag and drop attributes and metrics to display your data.

4 Save your finished dashboard

Click the **Save** icon  on the toolbar. Navigate to a location to save your dashboard, then give it a name. Click **Save**.

Next: Filter a visualization. See [Filter your data, page 7](#).

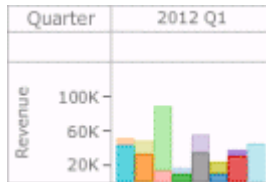


Visualization gallery

MicroStrategy Desktop offers a library of visualizations to provide multiple ways for you to view and interact with your data.

Graph

Display your data in a variety of graph styles, such as vertical area graphs, bubble graphs, pie graphs, and more.



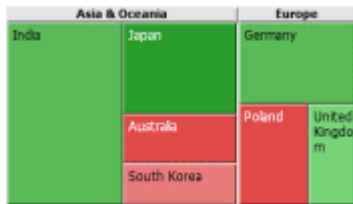
Grid

Display your data in an interactive table, then pivot, sort, move, drill, filter, and perform additional manipulations on your data.

Call Center	Revenue	Profit
Fargo	\$847,227	\$126,778
Milwaukee	\$4,182,139	\$637,545
Charleston	\$1,317,332	\$199,864
Washington, DC	\$3,135,283	\$473,200
Boston	\$1,487,936	\$224,495
New York	\$7,066,478	\$1,076,237
San Francisco	\$1,021,447	\$156,330

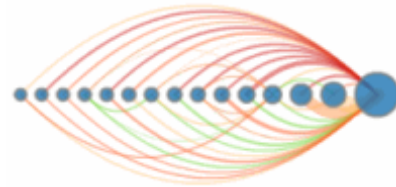
Heat Map

Grasp the state and impact of many variables at once. Information about your data is shown through the size and color of nested rectangles.



Network

Identify relationships between items. Data values are displayed as nodes, and lines between the nodes represent relationships between values.



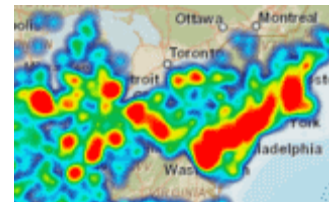
Map with Markers

Display geographical data with differently sized and colored markers on an interactive map.



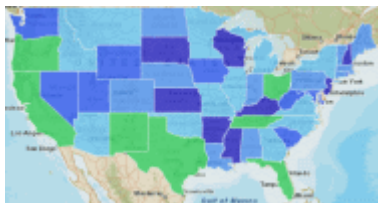
Density Map

Understand patterns for large amounts of geographical data by displaying color gradients on an interactive map.



Map with Areas

Display geographical data as colored regions on an interactive map.




For data requirements and steps to create each of these visualizations, click the arrow icon next to the visualization name in the Editor panel, and select **Help**.

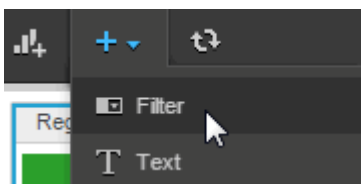


Filter your data

After you add visualizations, you can filter the data displayed on them, to limit and customize what is displayed on your dashboard. You can choose to filter all the visualizations on the dashboard, or filter a specific visualization. The steps below filter a single visualization. For steps to filter all the objects on a dashboard, see the *Desktop Help*.

1 Insert a filter for a visualization

In the toolbar of your dashboard, click the **Insert** icon , then click **Filter**. An empty filter is added to the dashboard and displayed.



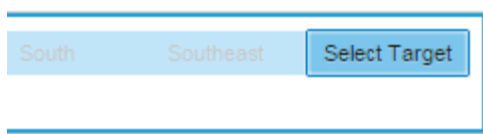
2 Select the data to filter on

From the Datasets panel, click the attribute or metric to filter on, and drag the object to the empty filter.



3 Select the visualization to be filtered

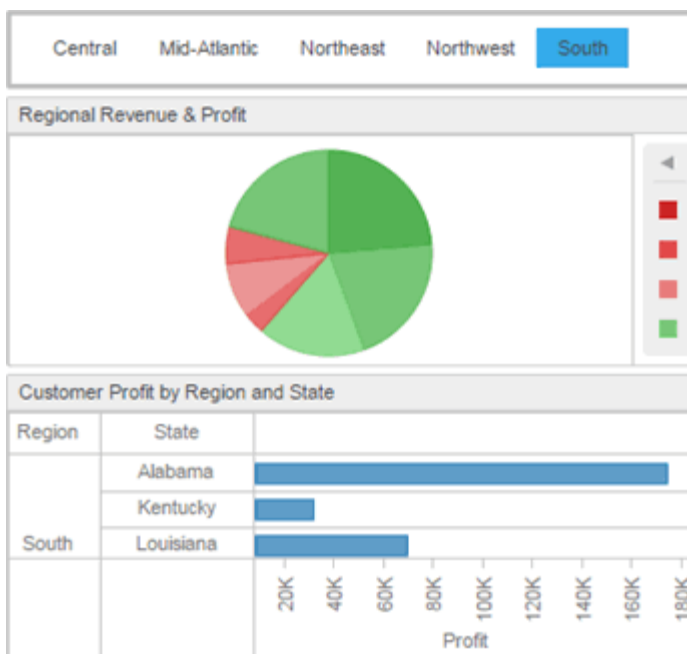
Click **Select Target** in the filter. Click the visualization to filter, then click **Apply** in the filter.



4 Filter the visualization

In the filter, select the values to display.

In the following example, South is selected in the filter. The filter targets the graph visualization on the bottom, to display South only, while the pie chart visualization on the top displays all the regions.



Next: Share your dashboard with your colleagues. See [Share your insights, page 8](#).




Share your insights

Save and share your insights with your colleagues. MicroStrategy Desktop makes it easy.

Share your dashboard with other MicroStrategy users

If your colleagues use MicroStrategy Desktop or MicroStrategy Web, you can share your saved dashboard with them. These users can quickly open your shared dashboard and datasets in their own environments, then perform their own analyses.

Click the **Save** icon  on the toolbar. Navigate to a location to save your dashboard, then give it a name. Click **Save**. The file is saved as an .mstr file, so that other MicroStrategy users can upload the file into their own environments. Another MicroStrategy Desktop user can open the .mstr in Desktop. For steps to use .mstr files in other MicroStrategy products, see the help for those products.

Share your entire dashboard as a PDF or image file

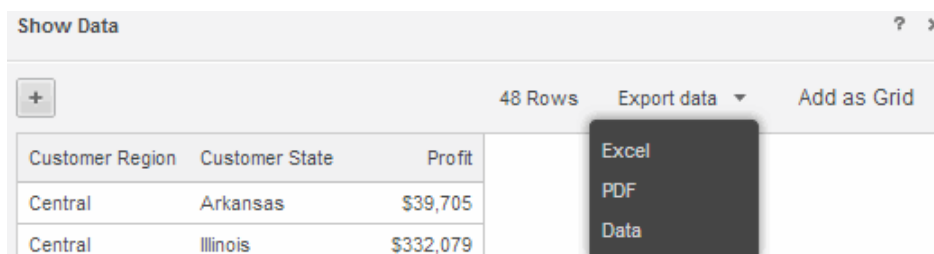
For all your colleagues (even those not using MicroStrategy), you can create a PDF, which can be viewed on any device with a PDF reader. You can also export the dashboard as an image file, with a PNG file extension.

From the **File** menu, point to **Export**, then select **PDF** or **Image**. Navigate to the location to save the exported file, then specify a name. Click **Save**.

Share an individual visualization

You can export an individual visualization as a data file, a PDF, or a Microsoft Excel file. A data file is saved as a comma-separated values (CSV) file.

Hover the cursor over the title bar of the visualization to export, then click the arrow icon in the top right. Point to **Show Data**. Click **Export Data**, and select **Excel**, **Data**, or **PDF**.



Navigate to the location to save the exported file, then specify a name. Click **Save**.