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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. 6,345,766, 6,733,350, 6,260,635, s.6,269,393, 6,279,033, 6,267,796, 6,287,747, 6,606,596, 6,635,093, 6,658,432, 6,662,825, 6,677,751, 6,691,100, 6,694,426, 6,697,858, 6,704,722, 6,741,890, 6,756,997, 6,758,788, 6,772,137, 6,788,786, 6,791,867, 6,801,941, 6,820,073, 6,829,334, 6,839,837, 6,859,603, 6,859,798, 6,863,693, 6,868,753, 6,890,953, 6,904,042, 6,977,992, 6,996,558, 6,996,569, 7,003,332, 7,010,538, 7,016,480, 7,020,251, 7,039,183, 7,098,242, 7,133,993, 7,127,410, 7,176,349, 7,181,417, 7,194,447, 7,197,461, 7,228,303, 7,260,577, 7,266,381, 7,272,232, 7,293,639, 7,324,943, 7,330,847, 7,356,094, 7,356,758, 7,366,840, 7,384,387, 7,412,394, 7,430,352, 7,440,898, 7,464,884, 7,509,790, 7,509,876, 7,516,381, 7,599,481, 7,600,548, 7,603,492, 7,613,201, 7,623,208, 7,686,237, 7,691,857, 7,694,969, 7,701,876, 7,702,286, 7,728,678, 7,806,161, 7,808,123, 7,814,443, 7,825,460, 7,904,584, 7,907,784, 8,005,970, 8,023,688, 8,025,564, 8,028,788, 8,030,828, 8,034,241, 8,414,575, 8,526,733, 8,529,029, 8,577,902, 8,606,813, 8,607,618, 8,643,333, 8,671,699, 8,755,807, 8,782,083, 8,824,980, 8,853,288, 8,943,434, 8,943,437, 8,959,537, 8,966,997, 8,983,440, 8,984,274, 8,984,288, 8,985,628, 9,007,999, 9,027,105, 9,037,377, 9,038,352, 9,076,006, 9,086,837, 9,095,924, 9,123,690, 9,154,393, 9,154,486, 9,160,172, 9,166,896, 9,177,073, 9,177,089, 9,177,334, 9,183,377, 9,185,814, 9,208,419, 9,208,444, 9,208,483, 9,208,484, 9,208,489, 9,208,538, 9,208,779, 9,212,225, 9,309,064, 9,314,683, 9,339,205, 9,339,374, 9,378,357, 9,381,392, 9,378,386, 9,386,412, 9,392,788, 9,397,886, 9,407,904, 9,412,376, 9,413,794, 9,430,629, 9,432,808, 9,439,397, 9,444,805, 9,450,949, 9,450,958, 9,454,994, 9,507,375, 9,533,770, 9,556,088, 9,559,895, 9,563,761, 9,563,775, 9,608,970, 9,614,001, and 9,616,465. Other patent applications are pending.

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Quick Start Overview

MicroStrategy Desktop is a powerful data discovery tool that allows you to access data and build dashboards. With MicroStrategy Desktop, you can access over 70 data sources, from personal spreadsheets to relational databases and big data sources. Go from data to dashboards in minutes.
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. See Data sources for data importing, page 7 for a list of other data sources.

1. Double-click the MicroStrategy Desktop icon.

2. Choose Add Data > New Data to import data into a new dataset. The Connect to Your Data dialog opens.

3. Select File From Disk.

4. Select Choose files to locate a file on your computer.
5. Navigate to the file, select it, and choose **Open > Prepare Data**.

6. Preview your data and assign data types.

   A selection of your data is displayed so you can preview and modify the data before it is imported.

   Each column of data is automatically identified as a business concept (an attribute), such as Product or Employee, or a business measure (a metric), such as Revenue or Profit.

   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**.

   ![Data column selection](image)

   Select the ? (Help) button for steps for additional tasks like preparing your data to be displayed on a map.

7. Remove white space, delete duplicates, and so on.

   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.

   Select **Wrangle** on the right to evaluate and transform your data. For steps, select the ? (Help) button.
8. Select **OK** to continue importing your data.

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

Next: [Display your data in a visualization](#) on your new dashboard.
Data sources for data importing

You can import data into MicroStrategy Desktop from many different data sources like

- From an Excel file or 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.

Select the ? (Help) button on the Connect to Your Data dialog for detailed steps on importing data.
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 you want to add. In your new dashboard from the Visualization Gallery on the right. Hover over the visualization icon to view its data requirements.

See Visualization types for example images of each visualization.

2. Drag attributes and metrics from the Dashboard Datasets panel onto different areas of the Editor panel to display data on the visualization.
Depending on the type of visualization, you can display your data with different colors, shapes, sizes, and more. For details and steps, select **Properties**, click the arrow icon next to the visualization name, and select **Help**.

3. Optionally, add a second visualization to explore the data in another way.
   - Select **Insert Visualization** on the toolbar.
   - Select a visualization type on the Visualization Gallery.
   - Drag attributes and metrics to display your data.

4. Select **Save** on the toolbar. Navigate to a location to save your dashboard and give it a name.

5. Select **Save**.

Next: **Filter a visualization**.
Visualization types

MicroStrategy Desktop offers a library of visualizations to provide multiple ways for you to view and interact with your data. Some of the visualization types are described below. See the Visualization Gallery for more examples.

Bar Chart

Display data in horizontal or vertical bars that show comparisons among groups of data.

Grid

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

Map

Display geographical data as colored regions, markers, or color gradients on an interactive map.

Network

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

Visualize the trends of your data in three dimensions: X-axis, Y-axis, and the size of the bubbles.

![Bubble Chart Image]

**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.

![Heat Map Image]

**Line Chart**

Display your data in horizontal or vertical lines that show comparisons among groups of data. Usually used for comparisons through time.

![Line Chart Image]
For data requirements and steps to create each of these visualizations, hover over the visualization icon in the Editor panel and select Help.
Filter your data

You can limit and customize what is displayed on your dashboard by filtering the data. You can 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 visualizations and other items on a dashboard, select Help at the top left.

1. From the toolbar, choose Insert > Filter. An empty filter is added to the dashboard.

2. Drag the attribute or metric to the empty filter from the Datasets panel on the left.

3. If you have more than one visualization in the dashboard, select Select Target in the filter. Select the visualization to filter then select Apply in the filter.

4. Select the values to display in the filter.

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

Next: Share your dashboard with your colleagues.
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 and perform their own analyses.

Select **Save** on the toolbar. Navigate to a location to save your dashboard and give it a name. Select **Save**. The file is saved as an .mstr file so other MicroStrategy users can upload the file into their own environments. For steps on using .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 that can be viewed on any device with a PDF reader. You can also export the dashboard as an image (.png).

From the File menu, choose **Export > PDF or Image**.

Navigate to the location to save the exported file, then specify a name. Select **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.
From the arrow icon in the visualization title bar, choose **Show Data > Export Data > Excel, Data, or PDF**. (You can also choose **Export** from the drop down menu and select the export format.)

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