RSDs vs Dossiers
Best Practices on When and Where to use them

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In this session:

- RSDs and Dossiers comparison
- Deciding which path to follow
- Integrating new features
- Demo
Just to be quite clear…
What do we mean by Report Services Document (RSD)?

A Report Services Document can be created from Web or, less frequently, from Developer.

It has an extensive design interface permitting elaborate structures, exquisitely precise design and possibly transactions.

This results in fully-functional applications where the inquiry flow is guided and the data stories fit a precise business scenario.
Just to be quite clear…
What do we mean by Dossier?

A Dossier is created either via Web, via Desktop or via Workstation.

Its streamlined interface permits data exploration with in-built import facilities from many sources.

This promotes rapid visualisation of data and generation of new insights with a free-form query mode.
We must consider important new features!
The user journey is changing

Workstation manages environments, creates and manages Dossiers and Libraries.
The Library organises content for users, and facilitates sharing and collaboration.
Collaboration Server allows colleagues to comment and collaborate on insights.

Workstation

Version 10.9.0.2775
Design Experience | Documents

MicroStrategy Web

- Durable business value
- Available via Web
- Pixel-aware development
- Perfect for mobile development
- Transaction-enabled
- Multimedia-ready
- Custom navigation
- Information overlays
- Powerful selectors
- Fine-grain formatting

Supports certification, library and collaboration
Design Experience | Dossiers
MicroStrategy Desktop, Web and Workstation

Governed Data Discovery
Available on Mac & PC
Web, Desktop and Workstation
Online/Offline support
Leverage in-memory technology
Data refinement and wrangling
Dropzone-driven development
Quick Data Visualization
Speed-of-thought filtering
Easy .mstr file-powered sharing

Supports certification, library and collaboration
Report Services Documents
Operational reporting

- Gauge widget
- Panel Selector at the top of the page
- In-canvas selectors at multiple levels
Operational reporting

- Microcharts
- Sparkline
- Graph Matrix
Operational reporting

- Metric selector
- Panel stacks
Financial reporting

- Advanced grid formatting
- Combo chart
- Twitter feed
Transactional forms

- Transactional inputs
- Customize action type and strategy
- Instantly write back to a database
Mobile development

- Landing page
- Custom navigation
- Pixel-perfect control
- Branding opportunities
Enterprise analytics

- Presentation Mode
- Support for images and text boxes
- Rapid visualization
- Threshold-enabled
- Share and collaborate
Ad hoc analytics

- Rapid discovery via data import
- Support for visualization targeting
- Quick formatting
- Share and collaborate
Documents vs. Dossiers

How do you choose?

Documents
• Pixel-perfect development
• Design mode is uncoupled from data execution
• Advanced visualization
• Comprehensive formatting
• Transactions
• Metric selectors

Dossiers
• Dropzone-oriented development
• WYSIWYG design is live against underlying data
• Quick visualization
• Smart defaults
• Discovery
• Prototyping
Documents vs. Dossiers

How do you choose?

1. Are you a business user?
   - Yes
     - Will the business user want to edit what you are creating?
       - No
         - Build documents
       - Yes
         - Do you need to build a highly customized application?
           - No
             - Build documents
           - Yes
             - Do you need transactional capabilities?
               - Yes
                 - Build documents
               - No
                 - Build documents

2. No
   - Build dossiers
<table>
<thead>
<tr>
<th>Feature</th>
<th>Dossiers</th>
<th>Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Self-Service capabilities</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Self-service content creation by business users</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Content certification</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td><strong>Formatting and layout capabilities</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Any device support with responsive design</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>High fidelity PDF export</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Pixel perfect layout</td>
<td>N</td>
<td>Y</td>
</tr>
<tr>
<td>Advanced layout (overlays, container sizing)</td>
<td>P</td>
<td>Y</td>
</tr>
<tr>
<td>Panel stacks</td>
<td>P</td>
<td>Y</td>
</tr>
<tr>
<td>Information windows</td>
<td>P</td>
<td>Y</td>
</tr>
<tr>
<td>Outline mode</td>
<td>P</td>
<td>Y</td>
</tr>
<tr>
<td>Report banding</td>
<td>N</td>
<td>Y</td>
</tr>
<tr>
<td>New color palettes</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Table of contents based navigation</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Filter panel with visualization-based filters</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Linking between different reports with context</td>
<td>P</td>
<td>Y</td>
</tr>
<tr>
<td>Linking within a report/dossier with context</td>
<td>Y</td>
<td>Y</td>
</tr>
</tbody>
</table>
## Documents vs. Dossiers

<table>
<thead>
<tr>
<th>Feature</th>
<th>Dossiers</th>
<th>Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collaboration and distribution</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Library web application for easy access to your content</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Collaboration</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Contextual collaboration</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Transaction services</td>
<td>P</td>
<td>Y</td>
</tr>
<tr>
<td>Distribution services</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Data and calculation capabilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prompt support</td>
<td>P</td>
<td>Y</td>
</tr>
<tr>
<td>Conditional metrics</td>
<td>P</td>
<td>Y</td>
</tr>
<tr>
<td>Advanced visualization filters</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Derived elements</td>
<td>P</td>
<td>Y</td>
</tr>
<tr>
<td>Project schema support</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Data import cube (MTDI) support</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Hierarchies with collapse/expand and dynamic navigation</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Leverages MicroStrategy platform security, authentication,</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ACLs, object management, LCM...</td>
<td>Y</td>
<td>Y</td>
</tr>
</tbody>
</table>
QUESTION:
How do I achieve the best of both worlds?
Getting Started

• Last year I stated in this session:
  • **Strategy 1**: Start by building a dashboard
  • **Strategy 2**: Invest time in building a document from the get-go

• **This year I would like to refine this statement:**
  • Always start with building a dossier – the value of defining and refining data stories easily is a strong factor in an application’s success.
  • Decide, based on uptake and requirement volatility, to keep the Dossier as is or transform it into a suite of Report Services Documents.
Documents vs. Dossiers | Cheat sheet

Do you know what you want?
- Yes
  - Do you require:
    - Transactions
    - Metric selector
    - Information Windows
    - Pixel-perfect formatting
    - Custom Navigation
    - Multimedia
- No
  - Have your requirements changed?
    - Yes
      - Create RSDs
    - No
      - Create Dossiers
Documents vs. Dossiers: What actually happens

Do you know what you want?
- Yes
- No

Yes: Risky

Do you require:
- Transactions
- Metric selector
- Information Windows
- Pixel-perfect formatting
- Custom Navigation
- Multimedia

Have your requirements changed?
- Yes
- No

Yes: Takes more time

Create RSDs

No: 95% of the time!

Create Dossiers
Documents vs. Dashboards | Who does what

Key: A = Analyst  D = Developer

Do you know what you want?

Yes

Do you require:
- Transactions
- Metric selector
- Information Windows
- Pixel-perfect formatting
- Custom Navigation
- Multimedia

Have your requirements changed?

Yes

No

Create RSDs

Create Dossiers

A

D

Yes
Documents with Dossiers!

Monolithic applications are a thing of the past. Many organisations implement **Landing Pages**. These are documents, usually data-driven and heavily branded, that direct the user towards applications addressing precise use cases.

Each application has, itself, a landing page – usually a summary of the key indicators that provide overall context for the use case. This can be a document or a dossier, depending on the functionality requirement.

The next level down can consist of documents, if required functionality demands it and if the exploration path is firmly set – or it can be a dossier, giving the end user freedom to explore the provided data, thus answering far more user stories.
However…
New features - Library
User-focused collection of artefacts

The MicroStrategy Library:
- Organises relevant content for users.
- Allows users to share, comment and collaborate on dossiers.
New features - Collaboration

Collaboration

Share insights with colleagues
- Use filter feature to highlight a particular scenario (dossiers only)
- Use colleague name to notify them of your comment.
New features - Workstation
Unification of MicroStrategy capabilities

Features in 10.10
- Dossier Authoring
- Data Import
- Groups and Users
- Data connections

Future releases will see functions from current standalone tools integrated into one unified offering.
Thoughts to take away

- Continued commitment to Documents
- Dossiers will continue to evolve
- Existing investment preserved
- Exciting possibilities with new features
Questions ?