

# Package ‘mstrio’

October 13, 2022

**Type** Package

**Title** Interface for 'MicroStrategy' REST API

**Version** 11.3.5.101

**Maintainer** Piotr Kowal <pkowal@microstrategy.com>

**Description** Interface for creating data sets and extracting data through the 'MicroStrategy' REST API. Access the demo API at <https://demo.microstrategy.com/MicroStrategyLibrary/api-docs/index.html>.

**License** Apache License 2.0 | file LICENSE

**Encoding** UTF-8

**Depends** R (>= 3.6.0)

**Imports** httr (>= 1.4.1), crul, openssl (>= 1.4.1), jsonlite (>= 1.6), methods, data.table, R6, markdown, rstudioapi, shinyjs, shiny, vctrs (>= 0.3.8)

**Suggests** httpptest, knitr, rmarkdown, testthat

**VignetteBuilder** knitr

**RoxygenNote** 7.1.2

**Collate** 'api-authentication.R' 'api-cubes.R' 'api-datasets.R' 'api-projects.R' 'api-reports.R' 'api-misc.R' 'connection.R' 'cube.R' 'dataset.R' 'report.R' 'utils-model.R' 'utils-formjson.R' 'utils-parser.R' 'utils-encoder.R' 'utils-errors.R' 'utils-filter.R' 'utils-files.R' 'utils-gui.R' 'utils-import.R' 'utils-helpers.R' 'utils-export.R' 'server.R' 'app.R'

**NeedsCompilation** no

**Author** Piotr Kowal [aut, cre]

**Repository** CRAN

**Date/Publication** 2022-04-13 14:40:05 UTC

R topics documented:

|                      |           |
|----------------------|-----------|
| Connection . . . . . | 2         |
| Cube . . . . .       | 5         |
| Dataset . . . . .    | 8         |
| Report . . . . .     | 12        |
| <b>Index</b>         | <b>16</b> |

---

|            |                                                  |
|------------|--------------------------------------------------|
| Connection | <i>Connect to the MicroStrategy environment.</i> |
|------------|--------------------------------------------------|

---

Description

Allows to establish, renew, check status and close the connection with MicroStrategy Intelligence Server.

Public fields

- base\_url URL of the MicroStrategy REST API server.
- username Your username.
- password Your password.
- project\_name Name of the connected MicroStrategy Project. One of project name or project id is necessary.
- project\_id ID of the connected MicroStrategy Project. One of project name or project id is necessary.
- login\_mode Specifies authentication mode to use. Standard = 1 (default) or LDAP = 16.
- ssl\_verify If True (default), verifies the server's SSL certificates with each request.
- web\_version The current web version
- iserver\_version The current I-Server version
- auth\_token The authentication token returned by the I-Server
- cookies Cookies
- identity\_token Identity token for delegated session. Used for connection initialized by GUI.
- verbose If True (default), displays additional messages.

Methods

Public methods:

- [Connection\\$new\(\)](#)
- [Connection\\$connect\(\)](#)
- [Connection\\$delegate\(\)](#)
- [Connection\\$get\\_identity\\_token\(\)](#)
- [Connection\\$close\(\)](#)

- [Connection\\$renew\(\)](#)
- [Connection\\$status\(\)](#)
- [Connection\\$clone\(\)](#)

**Method new():** Establishes new connection with MicroStrategy Intelligence Server.

*Usage:*

```
Connection$new(
  base_url,
  username = NULL,
  password = NULL,
  project_name = NULL,
  project_id = NULL,
  login_mode = 1,
  ssl_verify = TRUE,
  proxies = NULL,
  identity_token = NULL,
  verbose = TRUE
)
```

*Arguments:*

`base_url` URL of the MicroStrategy REST API server.

`username` Your username.

`password` Your password.

`project_name` Name of the connected MicroStrategy Project. One of project name or project id is necessary.

`project_id` ID of the connected MicroStrategy Project. One of project name or project id is necessary.

`login_mode` Specifies authentication mode to use. Standard = 1 (default) or LDAP = 16.

`ssl_verify` If True (default), verifies the server's SSL certificates with each request.

`proxies` If NULL (default) proxy is not defined. To set proxy use formula: (<username>:<password>@)<ip\_address>:<port>()-optional

`identity_token` Identity token for delegated session. Used for connection initialized by GUI.

`verbose` If True, displays additional messages. FALSE by default.

*Returns:* A new "Connection" object.

**Method connect():** Establishes new connection with MicroStrategy Intelligence Server, or renews active connection.

*Usage:*

```
Connection$connect()
```

**Method delegate():** Delegates identity token to get authentication token and connect to MicroStrategy Intelligence Server

*Usage:*

```
Connection$delegate()
```

**Method get\_identity\_token():** Gets identity token using existing authentication token

*Usage:*

```
Connection$get_identity_token()
```

**Method** `close()`: Closes a connection with MicroStrategy REST API.

*Usage:*

```
Connection$close()
```

**Method** `renew()`: Renews connection with MicroStrategy REST API.

*Usage:*

```
Connection$renew()
```

**Method** `status()`: Displays status of the connection with MicroStrategy REST API.

*Usage:*

```
Connection$status()
```

**Method** `clone()`: The objects of this class are cloneable with this method.

*Usage:*

```
Connection$clone(deep = FALSE)
```

*Arguments:*

`deep` Whether to make a deep clone.

## Examples

```
## Not run:
# Create a connection object.
connection = Connection$new(base_url, username, password, project_name)

# Connect or renew connection.
connection$connect()

# Check connection status.
connection$status()

# Renew connection to reset timeout counter.
connection$renew()

# Close connection.
connection$close()

## End(Not run)
```

---

Cube

*Extract a MicroStrategy cube into a R Data.Frame*

---

## Description

Access, filter, publish, and extract data from MicroStrategy in-memory cubes

Create a Cube object to load basic information on a cube dataset. Specify subset of cube to be fetched through `apply_filters()` and `clear_filters()`. Fetch dataset through `to_dataframe()` method.

## Public fields

`connection` MicroStrategy connection object  
`cube_id` Identifier of a report.  
`parallel` If TRUE, downloads cube data asynchronously. FALSE by default.  
`name` Cube name.  
`owner_id` ID of Cube owner.  
`path` Exact path of the cube location.  
`last_modified` Date of latest Cube modification.  
`size` Cube size.  
`status` Cube status.  
`attributes` Cube attributes.  
`metrics` Cube metrics  
`attr_elements` Cube attribute elements.  
`selected_attributes` Attributes selected for filtering.  
`selected_metrics` Metrics selected for filtering.  
`selected_attr_elements` Attribute elements selected for filtering.  
`dataframe` Dataframe containing data fetched from the Cube.  
`dataframe_list` List of dataframes split to match tables in Cube.  
`instance_id` Identifier of an instance if cube instance has been already initialized.

## Methods

### Public methods:

- `Cube$new()`
- `Cube$to_dataframe()`
- `Cube$apply_filters()`
- `Cube$clear_filters()`
- `Cube$get_attr_elements()`
- `Cube$update()`
- `Cube$save_as()`

- `Cube$clone()`

**Method** `new()`: Initialize an instance of a cube.

*Usage:*

```
Cube$new(connection, cube_id, instance_id = NULL, parallel = FALSE)
```

*Arguments:*

`connection` MicroStrategy connection object. See Connection class.

`cube_id` Identifier of a pre-existing cube containing the required data.

`instance_id` Identifier of an instance if cube instance has been already initialized, NULL by default.

`parallel` (bool, optional): If True, utilize optimal number of threads to increase the download speed. If False (default), this feature will be disabled.

**Method** `to_dataframe()`: Extract contents of a cube into a R Data Frame.

*Usage:*

```
Cube$to_dataframe(limit = NULL, multi_df = FALSE, callback = function(x, y) {
})
```

*Arguments:*

`limit` (int, optional): Used to control data extraction behaviour on cubes with a large number of rows. By default the limit is calculated automatically. If TRUE, overrides automatic limit.

`multi_df` If True (default), returns a list of dataframes resembling the table structure of the cube. If FALSE, returns one dataframe.

`callback` used by the GUI to extract the progress information.

*Returns:* Dataframe with data fetched from the given Cube.

**Method** `apply_filters()`: Apply filters on the cube data so only the chosen attributes, metrics, and attribute elements are retrieved from the Intelligence Server.

*Usage:*

```
Cube$apply_filters(
  attributes = NULL,
  metrics = NULL,
  attr_elements = NULL,
  operator = "In"
)
```

*Arguments:*

`attributes` (list or None, optional): ID numbers of attributes to be included in the filter. If list is empty, no attributes will be selected and metric data will be aggregated.

`metrics` (list or None, optional): ID numbers of metrics to be included in the filter. If list is empty, no metrics will be selected.

`attr_elements` (list or None, optional): Attributes' elements to be included in the filter.

`operator` (character, optional): Supported view filter operators are either "In" or "NotIn". This defines whether data will include ("In") or exclude ("NotIn") the supplied `attr_elements` values.

**Method** `clear_filters()`: Clear previously set filters, allowing all attributes, metrics, and attribute elements to be retrieved.

*Usage:*

```
Cube$clear_filters()
```

**Method** `get_attr_elements()`: Load all attribute elements of the Cube. Accessible via `Cube$attr_elements`. Fetching attribute elements will also allow for validating attribute elements by the filter object.

*Usage:*

```
Cube$get_attr_elements(limit = 50000, verbose = TRUE)
```

*Arguments:*

`verbose` If TRUE, displays list of attribute elements.

**Method** `update()`: Update single-table cube easily with the data frame stored in the Cube instance (`cube$dataframe`). Before the update, make sure that the data frame has been modified.

*Usage:*

```
Cube$update(update_policy = "update")
```

*Arguments:*

`update_policy` (character) Update operation to perform. One of 'add' (inserts new, unique rows), 'update' (updates data in existing rows and columns), 'upsert' (updates existing data and inserts new rows), or 'replace' (replaces the existing data with new data).

**Method** `save_as()`: Creates a new single-table cube with the data frame stored in the Cube instance (`cube$dataframe`). Before the update, make sure that the data exists.

*Usage:*

```
Cube$save_as(name, description = NULL, folder_id = NULL, table_name = NULL)
```

*Arguments:*

`name` (character): Name of the dataset. Must be less than or equal to 250 characters.

`description` (character, optional): Description of the dataset. Must be less than or equal to 250 characters.

`folder_id` ID of the shared folder that the dataset should be created within. If 'None', defaults to the user's My Reports folder.

`table_name` (character, optional) Name of the table. If NULL, the first table name of the original cube will be used.

**Method** `clone()`: The objects of this class are cloneable with this method.

*Usage:*

```
Cube$clone(deep = FALSE)
```

*Arguments:*

`deep` Whether to make a deep clone.

## Examples

```
## Not run:
# Create a connection object.
connection = Connection$new(base_url, username, password, project_name)

# Create a cube object.
my_cube <- Cube$new(connection=conn, cube_id="...")

# See attributes and metrics in the report.
my_cube$attributes
my_cube$metrics
my_cube$attr_elements

# Specify attributes and metrics (columns) to be fetched.
my_cube$apply_filters(attributes = my_report$attributes[1:2],
                      metrics = my_report$metrics[1:2])

# See the selection of attributes, metrics and attribute elements.
my_cube$selected_attributes
my_cube$selected_metrics
my_cube$selected_attr_elements

# Clear filtering to load a full dataset.
my_cube$clear_filters()

# Fetch data from the Intelligence Server.
my_cube$to_dataframe()

# See the dataframe.
my_cube$dataframe

## End(Not run)
```

---

Dataset

---

*Create, update, delete and certify MicroStrategy datasets*


---

## Description

When creating a new dataset, provide a dataset name and an optional description. When updating a pre-existing dataset, provide the dataset identifier. Tables are added to the dataset in an iterative manner using ‘add\_table()’.

## Public fields

connection MicroStrategy connection object  
name Name of the dataset  
description Description of the dataset. Must be less than or equal to 250 characters  
folder\_id If specified the dataset will be saved in this folder

dataset\_id Identifier of a pre-existing dataset. Used when updating a pre-existing dataset  
 owner\_id Owner ID  
 path Cube path  
 modification\_time Last modification time, "yyyy-MM-dd HH:mm:ss" in UTC  
 size Cube size  
 cube\_state Cube status, for example, 0=unpublished, 1=publishing, 64=ready  
 verbose If True (default), displays additional messages.

## Methods

### Public methods:

- `Dataset$new()`
- `Dataset$add_table()`
- `Dataset$create()`
- `Dataset$update()`
- `Dataset$publish()`
- `Dataset$publish_status()`
- `Dataset$delete()`
- `Dataset$certify()`
- `Dataset$clone()`

**Method** `new()`: Interface for creating, updating, and deleting MicroStrategy in-memory datasets.

#### *Usage:*

```
Dataset$new(
  connection,
  name = NULL,
  description = NULL,
  dataset_id = NULL,
  verbose = TRUE
)
```

#### *Arguments:*

`connection` MicroStrategy connection object returned by `'Connection$New()'`.

`name` (character): Name of the dataset.

`description` (character, optional): Description of the dataset. Must be less than or equal to 250 characters.

`dataset_id` (character, optional): Identifier of a pre-existing dataset. Used when updating a pre-existing dataset.

`verbose` Setting to control the amount of feedback from the I-Server.

*Details:* When creating a new dataset, provide a dataset name and an optional description. When updating a pre-existing dataset, provide the dataset identifier. Tables are added to the dataset in an iterative manner using `'add_table()'`.

*Returns:* A new 'Datasets' object

**Method** `add_table()`: Add a `data.frame` to a collection of tables which are later used to update the MicroStrategy dataset

*Usage:*

```
Dataset$add_table(
  name,
  data_frame,
  update_policy,
  to_metric = NULL,
  to_attribute = NULL
)
```

*Arguments:*

`name` (character): Logical name of the table that is visible to users of the dataset in MicroStrategy.

`data_frame` ('data.frame'): R `data.frame` to add or update.

`update_policy` (character): Update operation to perform. One of 'add' (inserts new, unique rows), 'update' (updates data in existing rows and columns), 'upsert' (updates existing data and inserts new rows), or 'replace' (replaces the existing data with new data).

`to_metric` (optional, vector): By default, R numeric data types are treated as metrics in the MicroStrategy dataset while character and date types are treated as attributes. For example, a column of integer-like strings ("1", "2", "3") would, by default, be an attribute in the newly created dataset. If the intent is to format this data as a metric, provide the respective column name as a character vector in 'to\_metric' parameter.

`to_attribute` (optional, vector): Logical opposite of 'to\_metric'. Helpful for formatting an integer-based row identifier as a primary key in the dataset.

*Details:* Add tables to the dataset in an iterative manner using 'add\_table()'.

**Method** `create()`: Create a new dataset.

*Usage:*

```
Dataset$create(
  folder_id = NULL,
  auto_upload = TRUE,
  auto_publish = TRUE,
  chunksize = 1e+05
)
```

*Arguments:*

`folder_id` ID of the shared folder that the dataset should be created within. If 'None', defaults to the user's My Reports folder.

`auto_upload` (default TRUE) If True, automatically uploads the data to the I-Server. If False, simply creates the dataset definition but does not upload data to it.

`auto_publish` (default TRUE) If True, automatically publishes the data used to create the dataset definition. If False, simply creates the dataset but does not publish it. To publish the dataset, data has to be uploaded first.

`chunksize` (int, optional) Number of rows to transmit to the I-Server with each request when uploading.

**Method** `update()`: Updates an existing dataset with new data.

*Usage:*

```
Dataset$update(chunksize = 1e+05, auto_publish = TRUE)
```

*Arguments:*

`chunksize` (int, optional): Number of rows to transmit to the I-Server with each request when uploading.

`auto_publish` (default TRUE) If True, automatically publishes the data. If False, data will be uploaded but the cube will not be published

**Method** `publish()`: Publish the uploaded data to the selected dataset. A dataset can be published just once.

*Usage:*

```
Dataset$publish()
```

**Method** `publish_status()`: Check the status of data that was uploaded to a dataset.

*Usage:*

```
Dataset$publish_status()
```

*Returns:* Response status code

**Method** `delete()`: Delete a dataset that was previously created using the REST API.

*Usage:*

```
Dataset$delete()
```

*Returns:* Response object from the Intelligence Server acknowledging the deletion process.

**Method** `certify()`: Certify a dataset that was previously created using the REST API

*Usage:*

```
Dataset$certify()
```

*Returns:* Response object from the Intelligence Server acknowledging the certification process.

**Method** `clone()`: The objects of this class are cloneable with this method.

*Usage:*

```
Dataset$clone(deep = FALSE)
```

*Arguments:*

`deep` Whether to make a deep clone.

## Examples

```
## Not run:
# Create data frames
df1 <- data.frame("id" = c(1, 2, 3, 4, 5),
                  "first_name" = c("Jason", "Molly", "Tina", "Jake", "Amy"),
                  "last_name" = c("Miller", "Jacobson", "Turner", "Milner", "Cooze"))

df2 <- data.frame("id" = c(1, 2, 3, 4, 5),
                  "age" = c(42, 52, 36, 24, 73),
                  "state" = c("VA", "NC", "WY", "CA", "CA"),
                  "salary" = c(50000, 100000, 75000, 85000, 250000))
```

```

# Create a list of tables containing one or more tables and their names
my_dataset <- Dataset$new(connection=conn, name="HR Analysis")
my_dataset$add_table("Employees", df1, "add")
my_dataset$add_table("Salaries", df2, "add")
my_dataset$create()

# By default Dataset$create() will upload the data to the Intelligence Server and publish the
# dataset.
# If you just want to create the dataset but not upload the row-level data, use
Dataset$create(auto_upload=FALSE)

# followed by
Dataset$update()
Dataset$publish()

# When the source data changes and users need the latest data for analysis and reporting in
# MicroStrategy, mstrio allows you to update the previously created dataset.

ds <- Dataset$new(connection=conn, dataset_id="...")
ds$add_table(name = "Stores", data_frame = stores_df, update_policy = 'update')
ds$add_table(name = "Sales", data_frame = stores_df, update_policy = 'upsert')
ds$update(auto_publish=TRUE)

# By default Dataset$update() will upload the data to the Intelligence Server and publish the
# dataset.
# If you just want to update the dataset but not publish the row-level data, use
Dataset$update(auto_publish=FALSE)

# By default, the raw data is transmitted to the server in increments of 100,000 rows. On very
# large datasets (>1 GB), it is beneficial to increase the number of rows transmitted to the
# Intelligence Server with each request. Do this with the chunksize parameter:

ds$update(chunksize = 500000)

# If you want to certify an existing dataset, use
ds$certify()

## End(Not run)

```

---

## Report

*Extract a MicroStrategy report into a R Data.Frame*

---

### Description

Access, filter, publish, and extract data from in-memory reports. Create a Report object to load basic information on a report dataset. Specify subset of report to be fetched through Report\$apply\_filters() and Report\$clear\_filters() . Fetch dataset through Report\$to\_dataframe() method.

**Public fields**

connection MicroStrategy connection object  
 report\_id Identifier of a report.  
 parallel If TRUE, downloads report data asynchronously. FALSE by default.  
 name Report name.  
 attributes Report attributes.  
 metrics Report metrics  
 attr\_elements Report attribute elements.  
 selected\_attributes Attributes selected for filtering.  
 selected\_metrics Metrics selected for filtering.  
 selected\_attr\_elements Attribute elements selected for filtering.  
 dataframe Dataframe containing data fetched from the Report.  
 cross\_tab boolean for filtering cross tabbed reports logic  
 cross\_tab\_filters view filters for cross tab reports  
 instance\_id Identifier of an instance if report instance has been already initialized.

**Methods****Public methods:**

- `Report$new()`
- `Report$to_dataframe()`
- `Report$apply_filters()`
- `Report$clear_filters()`
- `Report$get_attr_elements()`
- `Report$clone()`

**Method** `new()`: Initialize an instance of a report.

*Usage:*

```
Report$new(connection, report_id, instance_id = NULL, parallel = FALSE)
```

*Arguments:*

connection MicroStrategy connection object. See Connection class.  
 report\_id Identifier of a pre-existing report containing the required data.  
 instance\_id Identifier of an instance if report instance has been already initialized, NULL by default.  
 parallel (bool, optional): If True, utilize optimal number of threads to increase the download speed. If False (default), this feature will be disabled.

**Method** `to_dataframe()`: Extract contents of a Report into a R Data Frame.

*Usage:*

```
Report$to_dataframe(limit = NULL, callback = function(x, y) {
  })
```

*Arguments:*

**limit** (int, optional): Used to control data extraction behaviour on report with a large number of rows. By default the limit is calculated automatically. If TRUE, overrides automatic limit.

**callback** used by the GUI to extract the progress information

**Returns:** Dataframe with data fetched from the given Report.

**Method** `apply_filters()`: Apply filters on the report data so only the chosen attributes, metrics, and attribute elements are retrieved from the Intelligence Server.

*Usage:*

```
Report$apply_filters(
  attributes = NULL,
  metrics = NULL,
  attr_elements = NULL,
  operator = "In"
)
```

*Arguments:*

**attributes** (list or None, optional): ID numbers of attributes to be included in the filter. If list is empty, no attributes will be selected and metric data will be aggregated.

**metrics** (list or None, optional): ID numbers of metrics to be included in the filter. If list is empty, no metrics will be selected.

**attr\_elements** (list or None, optional): Attributes' elements to be included in the filter.

**operator** (character, optional): Supported view filter operators are either "In" or "NotIn". This defines whether data will include ("In") or exclude ("NotIn") the supplied attr\_elements values.

**Method** `clear_filters()`: Clear previously set filters, allowing all attributes, metrics, and attribute elements to be retrieved.

*Usage:*

```
Report$clear_filters()
```

**Method** `get_attr_elements()`: Load all attribute elements of the Report. Accessible via `Report$attr_elements`. Fetching attribute elements will also allow for validating attribute elements by the filter object.

*Usage:*

```
Report$get_attr_elements(limit = 50000, verbose = TRUE)
```

*Arguments:*

**limit** How many rows of data to fetch per request.

**verbose** If TRUE, displays list of attribute elements.

**Method** `clone()`: The objects of this class are cloneable with this method.

*Usage:*

```
Report$clone(deep = FALSE)
```

*Arguments:*

**deep** Whether to make a deep clone.

**Examples**

```
## Not run:
# Create a connection object.
connection = Connection$new(base_url, username, password, project_name)

# Create a report object.
my_report <- Report$new(connection, report_id)

# See attributes and metrics in the report.
my_report$attributes
my_report$metrics
my_report$attr_elements

# Specify attributes and metrics (columns) to be fetched.
my_report$apply_filters(attributes = my_report$attributes[1:2],
                        metrics = my_report$metrics[1:2])

# See the selection of attributes, metrics and attribute elements.
my_report$selected_attributes
my_report$selected_metrics
my_report$selected_attr_elements

# Clear filtering to load a full dataset.
my_report$clear_filters()

# Fetch data from the Intelligence Server.
my_report$to_dataframe()

# See the dataframe.
my_report$dataframe

## End(Not run)
```

# Index

Connection, [2](#)

Cube, [5](#)

Dataset, [8](#)

Report, [12](#)