

ADMINISTRATION ESSENTIALS FOR NEW ADMINS (REPORTS AND DASHBOARDS)

Exercise Guide



Table of Contents

7-1: Run and Modify a Report	1
7-2: Create a Simple Custom Report.....	4
7-3: Create a Matrix Report.....	6
7-4: Use Filters and Filter Logic in a Report.....	8
7-5: Create a Custom Report.....	10
7-6: Filter a Report with Relative Date Values	12
7-7: Add a Custom Summary Formula.....	13
7-8: Add Highlights and a Chart	15
7-9: Schedule and Email a Report.....	17
7-10: Create Custom Adoption Reports	19
7-11: Build a Global Sales Dashboard	22
7-12: Create a User Adoption Dashboard	26

7-1: Run and Modify a Report

Goals:

Allison Wheeler, VP of Global Sales, has requested a report showing all of her sales team's opportunities, by rep, that have been won this year.

Tasks:

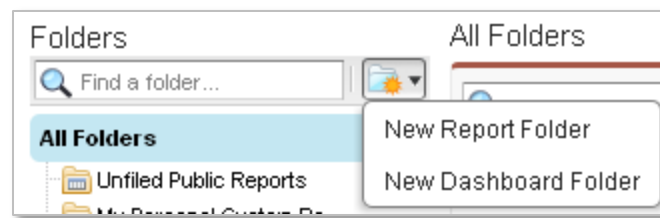
1. Create a new report folder called Global Sales Reports.
2. Run the standard Opportunity Pipeline report.
3. Modify the report to meet the requirements using the report options.
4. Save the report as Closed Business YTD in the Global Sales Reports folder.

Time:

5 minutes

Instructions:

1. Create a new report folder called Global Sales Reports.
 - A. Click the **Reports** tab.
 - B. To the right of the Find a folder... box, click the **button** and select **New Report Folder**, and then complete the Folder Edit page.



- i. Report Folder Label: Global Sales Reports
 - ii. Click **Save**.
- C. Hover over the newly created Global Sales Reports folder and click the **down** arrow that appears to the right.



D. Click **Share**.

i. Share with: **Roles and Subordinates**

- Click **Share** next to VP of Global Sales/Sales Operations.
- Access: **Viewer**
- Click **Done**.

ii. Share with: **Users**

- Click **Share** next to Allison Wheeler.
- Access: **Viewer**
- Repeat for John Wiseman.
- Click **Done**.

E. Click **Close**.

2. Run the standard Opportunity Pipeline report.

- Click the **Opportunity Reports** folder.
- Click the **Opportunity Pipeline** report.

3. Modify the report to meet the requirements using the report options.

- Modify the report options.
 - Summarize information by: **Opportunity Owner**
 - Range: **Current FY**
 - Opportunity Status: **Closed Won**

B. Click **Run Report**.

C. Click **Hide Details**.

4. Save the report as Closed Business YTD in the Global Sales Reports folder.

A. Click **Save As**, and then complete the Save Report details.

- Report Name: Closed Business YTD
- Report Description: What opportunities have we won this fiscal

- year?
- iii. Report Folder: **Global Sales Reports**
- B. Click **Save & Return to Report**.

7-2: Create a Simple Custom Report

Goals:

Allison Wheeler, VP of Global Sales, would like a report showing all open opportunities, organized by sales rep, with the opportunity amount subtotaled for each rep.

Tasks:

1. Create a new opportunity report.
2. Set the scope of the report using the standard filters.
3. Change the columns as required.
4. Select the format and grouping.
5. Add a summary field.
6. Save the report as Opportunities by Rep in the Global Sales Reports folder.

Time:

5 minutes

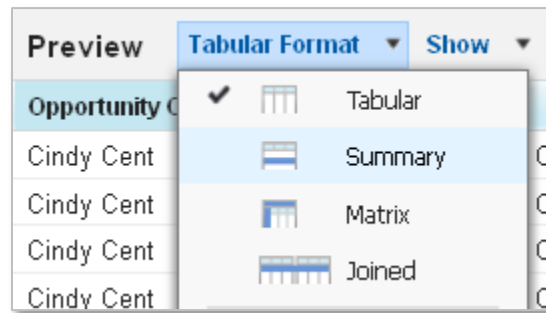
Instructions:

1. Create a new opportunity report.
 - A. Click the **Reports** tab.
 - B. Click **New Report**.
 - C. In the Select Report Type list, double-click **Opportunities**, and then select **Opportunities** from the list that appears.
 - D. Click **Create**. If you are prompted to take a tour of the report builder, click **No Thanks**.
2. Set the scope of the report using the standard filters.
 - A. In the Filters pane, set the Opportunity Status to **Open**.
 - B. Set the Range to **All Time**.
3. Change the columns as required.
 - A. Hold down **CTRL** and click the column headers.
 - Type
 - Lead Source
 - Next Step
 - Fiscal Period
 - Age
 - Created Date
 - Owner Role
 - B. Click on **one** of the selected column headers and drag the selection into the Fields

- pane.
- C. Hold down **CTRL** and click the column headers.

Opportunity Owner **Account Name**

- D. Drag the **selected** columns and drop them in front of the Opportunity Name column.
 - E. From the Fields pane, drag the **Stage Duration** field into the preview pane and drop it to the right of the Stage column.
4. Select the format and grouping.
- A. At the top of the Preview pane, click **Tabular Format** and select **Summary**.



- B. Hover over the **Opportunity Owner** column heading, click the **arrow** button that appears, and select **Group by this Field**.
5. Add a summary field.
- A. Hover over the **Amount** column heading, click the **arrow** button that appears, and select **Summarize this Field**.
 - B. Select the **Sum** checkbox, and click **Apply**.
6. Save the report as Opportunities by Rep in the Global Sales Reports folder.
- A. Click **Run Report**.
 - B. Click **Save As**, and then complete the Save Report details.
 - i. Report Name: Opportunities by Rep
 - ii. Report Description: What opportunities do my reps have in the pipeline?
 - iii. Report Folder: **Global Sales Reports**
 - C. Click **Save & Return to Report**.

7-3: Create a Matrix Report

Goals:

Allison Wheeler, VP of Global Sales, would like the Opportunities by Rep report to show opportunities additionally grouped by Close Date and displayed in a table.

Tasks:

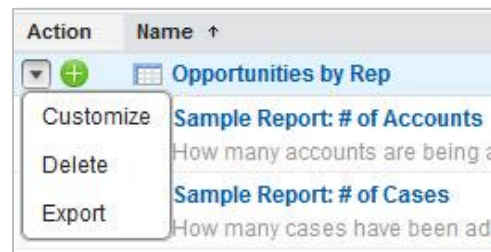
1. Modify the Opportunities by Rep report to additionally group by the calendar month of the Close Date.
2. Change the format of the report to matrix.
3. Save the report as a new report called Opportunities by Rep and Close Month in the Global Sales Reports folder.

Time:

5 minutes

Instructions:

1. Modify the Opportunities by Rep report to additionally group by the calendar month of the Close Date.
 - A. Click the **Reports** tab.
 - B. Click the **Action** button (**down** arrow) next to the Opportunities by Rep report, and select **Customize**.



- C. Drag the **Close Date** column heading into the Drop a field here to create a grouping drop zone.
 - D. On the left of the first Close Date summary row, click the **arrow** button and do the following:
 - i. Hover over **Group Dates By**
 - ii. Select **Calendar Month**
2. Change the format of the report to matrix.
 - A. Click **Summary Format** and select **Matrix**.
 - B. Click **Show**, and then click **Details** to deselect it.

3. Save the report as a new report called Opportunities by Rep and Close Month in the Global Sales Reports folder.
 - A. Click **Run Report**.
 - B. Click **Save As**, and then complete the Save Report details.
 - i. Report Name: Opportunities by Rep and Close Month
 - ii. Report Description: What opportunities do my reps have in the pipeline and when do they close?
 - iii. Report Folder: **Global Sales Reports**
 - C. Click **Save & Return to Report**.

7-4: Use Filters and Filter Logic in a Report

Goals:

Conner McCoy, VP of Marketing, would like to see a list of all customer accounts based in New York, Massachusetts, Pennsylvania, or New Jersey that have either a Prospect Rating of Hot, or Annual Revenue over 8 million.

Tasks:

1. Create a new account report.
2. Add the necessary filters and filter logic:
 - Type is Customer.
 - Billing State/Province is New York, Massachusetts, Pennsylvania, or New Jersey.
 - Prospect Rating is Hot or Annual Revenue is greater than 8 million.
3. Save the report as Northeast Target Accounts in the Marketing Reports folder.

Time:

5 minutes

Instructions:

1. Create a new account report.
 - A. Click the **Reports** tab.
 - B. Click **New Report**.
 - C. In the Select Report Type list, double-click **Accounts and Contacts**, and then select **Accounts** from the list that appears.
 - D. Click **Create**.
 - E. In the Filters pane, set the new report filter criteria.
 - i. Show: **All accounts**
 - ii. Range: **All Time**
 - F. Hold down **CTRL**, click the following column headers, and drag them into the Fields pane:
Last Activity
Last Modified Date
 - G. In the Fields pane, double-click **Annual Revenue** to add it to the report.
2. Add the necessary filters and filter logic.
 - A. In the Filters pane, click **Add**, and create the needed filters (click **OK** after each one, and click **Add** to create the next).

- i. **Type equals Customer**
 - ii. **Billing State/Province equals** NY, MA, PA, NJ
 - iii. **Prospect Rating equals Hot**
 - iv. **Annual Revenue greater than** 8000000
- B. Click the **arrow** part of the Add button and select **Filter Logic**.
- C. In the Filter Logic field, change the logic to 1 **AND** 2 **AND** (3 **OR** 4) and click **OK**.
3. Save the report as Northeast Target Accounts in the Marketing Reports folder.
 - A. Click **Run Report**.
 - B. Click **Save As**, and then complete the Save Report details.
 - i. Report Name: Northeast Target Accounts
 - ii. Report Description: Who are our important customers in the northeast states?
 - iii. Report Folder: **Marketing Reports**
 - C. Click **Save & Return to Report**.

7-5: Create a Custom Report

Goals:

Conner McCoy, VP of Marketing, wants to perform industry segmentation analysis on customer accounts and has requested a report displaying all customer accounts grouped by industry. He would like to see an annual revenue subtotal for all customers in each industry.

Tasks:

1. Create a new account report showing all accounts.
2. Group the accounts by Industry, and summarize the Annual Revenue field.
3. Add a filter to limit the report to just customer accounts.
4. Save the report as Accounts by Industry in the Marketing Reports folder.

Time:

5 minutes

Instructions:

1. Create a new account report.
 - A. Click the **Reports** tab.
 - B. Click **New Report**.
 - C. In the Select Report Type list, double-click **Accounts and Contacts**, and then select **Accounts** from the list that appears.
 - D. Click **Create**.
 - E. In the Filters pane, set the new report filter criteria.
 - i. Show: **All accounts**
 - ii. Range: **All Time**
 - F. Hold down **CTRL**, click the following column headers, and drag them into the Fields pane:
Prospect Rating
Last Activity
Last Modified Date
 - G. In the Fields pane, hold down **CTRL**, and select the following fields:
Annual Revenue
Industry
 - H. Drag the selected fields into the Preview pane and drop them to the right of the Account Name column.

2. Group the accounts by Industry, and summarize the Annual Revenue field.
 - A. Hover over the **Industry** column heading, click the **arrow** button that appears, and select **Group by this Field**.
 - B. Hover over the **Annual Revenue** column, click the **arrow** button that appears and select **Summarize by this field**.
 - C. Click **Sum**.
 - D. Click **Apply**.
3. Add a filter to limit the report to just customer accounts.
 - A. In the Filters pane, click **Add**.
 - B. Create the filter **Type equals Customer**
 - C. Click **OK**.
4. Save the report as Accounts by Industry in the Marketing Reports folder.
 - A. Click **Run Report**.
 - B. Click **Save As**, and then complete the Save Report details.
 - i. Report Name: `Customer Accounts by Industry`
 - ii. Report Description: `What are the customer accounts grouped by industry?`
 - iii. Report Folder: **Marketing Reports**
 - C. Click **Save & Return to Report**.

7-6: Filter a Report with Relative Date Values

Goals:

John Wiseman, CEO, is very focused on user adoption and wants to ensure the company is getting the most out of its user licenses. He wants a weekly report of all users who have NOT logged into Salesforce in the last seven days.

Tasks:

1. Customize the standard Users Logged in This Week report to display users, by role, who have not logged in during the last seven days.
2. Save the report as a new report called Wall of Shame in the Adoption Reports folder.

Time:

5 minutes

Instructions:

1. Customize the standard Users Logged in This Week report to display users who have not logged in during the last seven days.
 - A. Click the **Reports** tab.
 - B. Click the **Administrative Reports** folder.
 - C. Click the **Users Logged in This Week** report.
 - D. Click **Customize**.
 - i. In the Filters pane, from the Range picklist, select **All Time**.
 - ii. In the Fields pane, find **Role** and double-click to add it to the report.
 - ii. Hover over the **Role** column heading, click the **arrow** button that appears, and select **Group by this Field**.
 - iii. In the Filters pane, click **Add**.
 - iv. Create the filter **Last Login not equal to** Last 7 Days (enter Last 7 Days manually).
 - v. Click **OK**.
 - E. Click **Run Report**.
2. Save the report as a new report called Wall of Shame in the Adoption Reports folder.
 - A. Click **Save As**, and then complete the Save Report details.
 - i. Report Name: Wall of Shame
 - ii. Report Description: Who hasn't logged in the last 7 days?
 - iii. Report Folder: **Adoption Reports**
 - B. Click **Save & Return to Report**.

7-7: Add a Custom Summary Formula

Goal:

Allison Wheeler, VP of Global Sales, would like a report showing the company's win rates by sales rep.

Tasks:

1. Modify the Opportunities by Rep report to display closed opportunities by sales rep.
2. Add a custom summary formula to display the win rate by sales rep.
3. Save the report as a new report called Sales Rep Win Rates in the Global Sales Report folder.

Time:

5 minutes

Instructions:

1. Modify the Opportunities by Rep report to display closed opportunities by sales rep.
 - A. Click the **Reports** tab.
 - B. Click the **Action** button (**down** arrow) next to the Opportunities by Rep report, and select **Customize**.
 - C. In the Filters pane, from the Opportunity Status picklist, select **Closed**.
2. Add a custom summary formula to display the win rate by sales rep.
 - A. In the Fields pane, double-click **Add Formula**, and enter the formula.
 - i. Column Name: `Win Rate`
 - ii. Description: `Ratio of won to closed opportunities.`
 - iii. Format: **Percent**
 - iv. Decimal Places: `2`
 - v. Where will this formula be displayed?: **At all summary levels**
 - vi. In the Formula section, click **Summary Fields**, hover over **Won**, and then select **Sum**.
 - vii. Click **Operators**, and then select **/Divide**.
 - viii. Click **Summary Fields**, hover over **Closed**, and then select **Sum**.
 - ix. Click **OK**.
 - B. Click **Show**, and then click **Details** to hide details.
3. Save the report as a new report called Sales Rep Win Rates in the Global Sales Report folder.
 - A. Click **Run Report**.
 - B. Click **Save As**, and then complete the Save Report details.

- i. Report Name: Sales Rep Win Rates
 - ii. Report Description: How well are my sales reps closing?
 - iii. Report Folder: **Global Sales Reports**
- C. Click **Save & Return to Report**.

7-8: Add Highlights and a Chart

Goal:

Allison Wheeler, VP of Global Sales, wants to highlight sales rep win rates in different colors to help identify the high and the low performers. She also wants to compare these win rates visually in a chart.

Tasks:

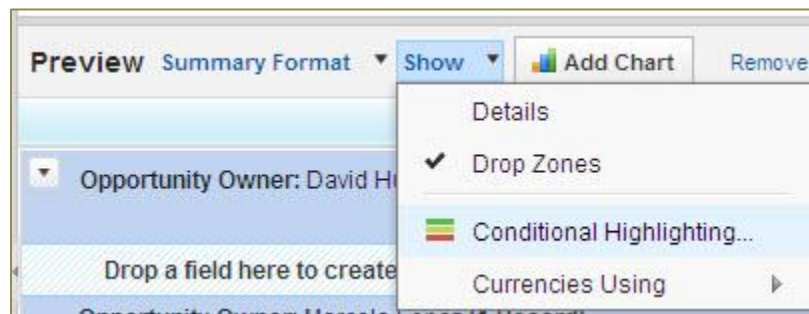
1. Modify the Sales Rep Win Rates report to add a conditional highlight to the Win Rate summary formula.
2. Add a vertical bar chart to compare sales rep win rates.
3. Save the report with the same name.

Time:

5 minutes

Instructions:

1. Modify the Sales Rep Win Rates report to add a conditional highlight to the Win Rate summary formula.
 - A. Click the **Reports** tab.
 - B. Click the **Action** button (**down** arrow) next to the Sales Rep Win Rates report, and select **Customize**.
 - C. Click **Show**, select **Conditional Highlighting...** and complete as follows:



- i. From the Select Field picklist, select **Win Rate**.
 - ii. In the next field to the right, enter 40 as the low breakpoint.
 - iii. In the next field to the right, enter 70 as the high breakpoint.
- D. Click **OK**.
2. Add a vertical bar chart to compare sales rep win rates.
 - A. Click **Add Chart**.
 - B. From the Select Type options at the top of the Chart Editor, select **Vertical Bar**

Chart.

- i. On the Chart Data tab, from the Y-Axis picklist, select **Win Rate**.
 - ii. Click the **Formatting** tab, and complete as follows:
 - a. Chart Title: `Sales Rep Win Rates`
 - b. Enable Hover: **Select**
 - c. Chart Size: **Small**
- C. Click **OK**.
3. Save the report with the same name.
 - A. Click **Run Report**.
 - B. Click **Save**.
 - C. Click **Save & Return to Report**.

7-9: Schedule and Email a Report

Goal:

Allison Wheeler, VP of Global Sales, would like to have the latest Sales Rep Win Rates report emailed to her every Wednesday morning ready for her 9:00 am team meeting.

Tasks:

1. Run the Sales Rep Win Rates report.
2. Schedule the report as per Allison's request.
3. Unschedule the report.

Time:

5 minutes

Instructions:

1. Run the Sales Rep Win Rates report.
 - A. Click the **Reports** tab.
 - B. Click the **Sales Rep Win Rates** report.
2. Schedule the report as per Allison's request.
 - A. Click the **arrow** part of the Run Report button, and select **Schedule Future Runs...**
 - B. Complete the Schedule Report page.
 - i. Running User: **Allison Wheeler**
 - ii. Email Report: **To me and/or others...**
 - iii. Search: **Users**
 - iv. From the Select From list, select **Allison Wheeler**, and then click **Add**.
 - v. Frequency: **weekly on Wednesday**
 - vi. Preferred Start Time: Click the **Find available options...** link and select the earliest available time.
 - vii. Click **Save Report Schedule**.
 - C. Click the **Reports** tab.
 - D. In the Scheduled column, hover over the **check** next to Sales Rep Win Rates to see the schedule details.
3. Unschedule the report.
 - A. Click the **Sales Rep Win Rates** report.
 - B. Click the **arrow** part of the Run Report button, and select **Schedule Future Runs...**
 - C. Click **Unschedule Report** to cancel the schedule.
 - D. Click **OK** in the warning box.

Note: This step is to ensure you won't receive weekly emails to your personal email address used in the training environment.

7-10: Create Custom Adoption Reports

Goal:

John Wiseman, CEO, would like to see how well Salesforce CRM has been adopted by the AW Computing users. He wants to see how many new records are being created, and who is and who isn't logging in regularly.

Tasks:

Create reports to display the following:

1. The number of opportunities created in the last 120 days, grouped by close month and owner role.
2. The number of active users (users who have logged in over the past 7 days).

Time:

10 minutes

Instructions:

1. Create a report to display the number of opportunities created in the last 120 days, grouped by close month and owner role.
 - A. Click the **Reports** tab.
 - B. Click **New Report**.
 - C. In the Select Report Type list, double-click **Opportunities**, and then select **Opportunities** from the list that appears.
 - D. Click **Create**.
 - E. Set the new report filter criteria.
 - i. Show: **All Opportunities**
 - ii. Opportunity Status: **Any**
 - iii. Probability: **All**
 - iv. Date Field: **Created Date**
 - v. Range: **Last 120 Days**
 - F. Remove all columns except Opportunity Name, Amount, Close Date, Created Date, Opportunity Owner and Owner Role.
 - G. Click **Tabular Format**, and select **Summary**.
 - H. Group the opportunities by Close Date and Owner Role as follows:
 - i. From the Preview pane, drag the **Close Date** field into the Drop a field here to create a grouping drop zone.
 - ii. Click the **arrow** button on the left of the first Close Date summary row.

- iii. Hover over **Group Dates By** and select **Calendar Month**.
 - iv. From the Preview pane, drag the **Owner Role** field into the Drop a field here to create a grouping drop zone to create a second level of grouping.
 - I. Click **Run Report**.
 - J. Click **Save As**, and enter the report details.
 - i. Report Name: Opportunities Created in Last 120 Days
 - ii. Report Description: How productive are our sales reps?
 - iii. Report Folder: **Adoption Reports**
 - K. Click **Save and Return to Report**.
2. Create a report to display the number of active users (users who have logged in over the past 7 days).
 - A. Click the **Reports** tab.
 - B. Click **New Report**.
 - C. In the Select Report Type list, double-click **Administrative Reports**, and then select **Users** from the list that appears.
 - D. Click **Create**.
 - E. Set the filter criteria.
 - i. View: **Active Users**
 - ii. Date Field: **Last Login**
 - iii. Range: **Last 7 Days**
 - F. Remove the following columns:
Profile
Alias
Last Login
 - G. Add the Login Date/Time column.
 - i. In the Fields pane Quick Find box, enter **login**.
 - ii. Double-click the **Login Date/Time** field to add it as a column.
 - H. Click **Tabular Format**, and select **Summary**.
 - I. Drag the **Username** column heading into the Drop a field here to create a grouping drop zone.
 - J. Summarize by Active as follows:
 - i. Hover over the **Active** column heading, click the **arrow** button that appears, and select **Summarize this Field**.
 - K. Select **Sum**, and click **Apply**.
 - L. Click **Save**, and enter the report details.

- i. Report Name: No. of Users Logged in Last 7 Days
 - ii. Report Description: How many users have logged in over the last 7 days?
 - iii. Report Folder: **Adoption Reports**
- M. Click **Save and Run Report**.

7-11: Build a Global Sales Dashboard

Goal:

Allison Wheeler, VP of Global Sales, would like a dashboard to display the key information from her sales reports. The dashboard should also be accessible to her team.

Tasks:

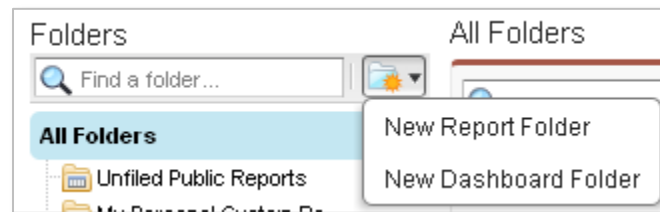
1. Create a new folder called Global Sales Dashboards.
2. Create the Global Sales dashboard with Allison Wheeler as the running user.
3. Add a Closed Business YTD gauge component.
4. Add Opportunities by Rep chart and metric components.
5. Add Sales Rep Win Rates table and gauge components.
6. Save the dashboard and schedule a daily refresh at 8:00 am.

Time:

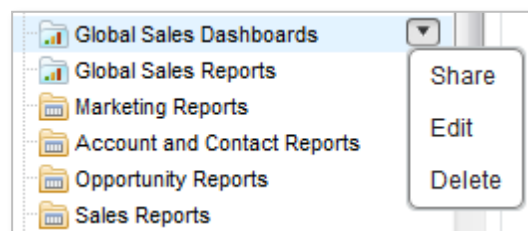
10 minutes

Instructions:

1. Create a new folder called Global Sales Dashboards.
 - A. Click the **Reports** tab.
 - B. To the right of the Find a folder... box, click the **button** and select **New Dashboard Folder**, and then complete the Folder Edit page.

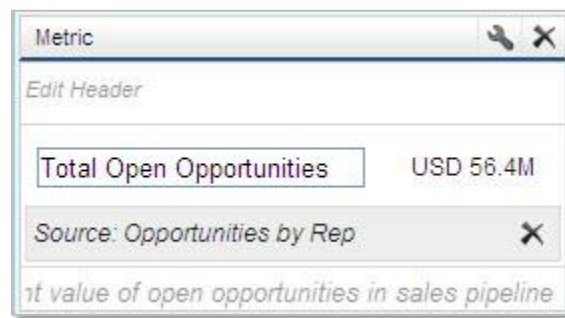


- i. Dashboard Folder Label: **Global Sales Dashboards**
 - ii. Click **Save**.
- C. Hover over the newly created **Global Sales Dashboards** folder and click the **down** arrow that appears to the right.



- D. Click **Share**.
 - i. Share with: **Roles and Subordinates**
 - a. Click **Share** next to VP: of Global Sales/Sales Ops.
 - b. Access: **Viewer**
 - c. Click **Done**.
 - E. Click **Close**.
2. Create the Global Sales dashboard with Allison Wheeler as the running user.
 - A. Click **New Dashboard**. (Click **No Thanks** if you see a message prompting you to take a tour.)
 - B. In View dashboard as, enter Allison Wheeler
 3. Add a Closed Business YTD gauge component.
 - A. From the Components tab on the left, drag the **Gauge** component into the first column.
 - B. Click the **Data Sources** tab, and in the Quick Find box, enter `closed`
 - C. Drag the **Closed Business YTD** report onto the Gauge component.
 - D. Click on the **text** areas of the component to enter the corresponding information.
 - i. Edit Header: `Closed Business`
 - ii. Edit Title: `Closed Business YTD`
 - iii. Edit Footer: `Value of won opportunities this fiscal year.`
 - E. Click the **edit attributes** (wrench) icon on the component.
 - F. Click the **Formatting** tab and enter the component settings, ignoring any red error messages that appear.
 - i. Minimum: 0
 - ii. Breakpoint 1: 2000000
 - iii. Breakpoint 2: 4000000
 - iv. Maximum: 6000000
 - v. Show %: **Select**
 - G. Click **OK**.
 4. Add Opportunities by Rep chart and metric components.
 - A. On the Data Sources tab, in the Quick Find box, enter `opportunities`
 - B. Drag the **Opportunities by Rep** report twice into the second column.
 - C. Click the **Components** tab, and drag the **Vertical Bar Chart** component onto the first source report in the second column.
 - D. Click on the **text** areas of the component to enter the corresponding information.

- i. Edit Header: Sales Pipeline
 - ii. Edit Title: Open Opportunities by Rep
- E. Click the **edit attributes** (wrench) icon on the component.
- F. Click the **Formatting** tab, and enter the component settings.
- i. Sort Rows By: **Value Descending**
 - ii. Show Details on Hover: **Select**
- G. Click the **Component Data** tab, and from the Drill Down to picklist, select **Record Detail Page**.
- H. Click **OK**.
- I. Click the **Components** tab, and drag the **Metric** component onto the second source report in the second column.
- J. Click on the **text** areas of the component to enter the corresponding information.
- i. Label (box next to value): Total Open Opportunities



- ii. Edit Footer: This column displays the current value of open opportunities in sales pipeline.
5. Add Sales Rep Win Rates table and gauge components.
- A. Click the **Components** tab, and drag the **Table and Gauge** components into the third column.
- B. Click the **Data Sources** tab, and in the Quick Find box, enter win
- C. Drag the **Sales Rep Win Rates** report onto the Table component.
- D. Click on the **text** areas of the component to enter the corresponding information.
- i. Edit Header: Win Rates
 - ii. Edit Title: Leaderboard
- E. Click the **edit attributes** (wrench) icon on the component.
- F. Click the **Formatting** tab, and enter the component settings.
- i. Sort Rows By: **Value Descending**
 - ii. Show Chatter Photos: **Select**

- G. Click **OK**.
 - H. Drag the **Sales Rep Win Rates** report onto the Gauge component in the third column.
 - I. Click on the **text** areas of the component to enter the corresponding information.
 - i. **Edit Title:** Company Win Rate
 - ii. **Edit Footer:** Values in this column are based on ratio of won to closed opportunities.
 - J. Click the **edit attributes (wrench)** icon on the component.
 - K. Click the **Formatting** tab, and enter the component settings, ignoring any red error messages that appear.
 - i. **Minimum:** 0
 - ii. **Breakpoint 1:** 40
 - iii. **Breakpoint 2:** 70
 - iv. **Maximum:** 100
 - L. Click **OK**.
6. Save the dashboard and schedule a daily refresh at 8:00 am.
- A. Click **Save**, and then complete the Save Dashboard details as follows:
 - i. **Title:** Global Sales Dashboard
 - ii. **Save To:** **Global Sales Dashboards**
 - B. Click **Save and Run Dashboard**.
 - C. Click the **arrow** part of the Refresh button, and select **Schedule Refresh...**
 - D. Complete the Schedule Dashboard Refresh page.
 - i. **Email Dashboard:** **To me and To others...**
 - ii. **Search:** **Roles and Subordinates**
 - iii. From the Select From list, select **Role and Subordinates: VP of Global Sales/Sales Ops**, and then click **Add**.
 - iv. **Frequency:** **Daily and Every Weekday**
 - v. **Preferred Start Time:** Click the **Find available options...** link and select **8:00 AM**.
 - E. Click **Save**.
 - F. Unschedule the Dashboard Refresh to avoid receiving emails from the training org.
 - i. Click the **arrow** part of the Refresh button, and select **Schedule Refresh...**
 - ii. Click **Unschedule Dashboard**.
 - iii. Click **OK**.

7-12: Create a User Adoption Dashboard

Goal:

John Wiseman, CEO, has requested a user adoption dashboard to display the key data from his adoption reports. The dashboard should be visible to the Executive team and Sales Operations only.

Tasks:

1. Create a new folder called Executive Dashboards.
2. Create the User Adoption dashboard with John Wiseman as the running user.
3. Add a gauge component to show active users this week.
4. Add a chart component to show new opportunities created in the last 120 days.
5. Add a table component to show roles who have not logged in over the past 7 days.

Time:

10 minutes

Instructions:

1. Create a new folder called Executive Dashboards.
 - A. Click the **Reports** tab.
 - B. To the right of the Find a folder... box, click the **button** and select **New Dashboard Folder**, and then complete the Folder Edit page.
 - i. Dashboard Folder Label: `Executive Dashboards`
 - ii. Click **Save**.
 - C. Hover over the newly created **Executive Dashboards** folder and click the **down** arrow that appears to the right.
 - D. Click **Share**.
 - i. Share with: **Roles**
 - a. Click Share next to the following roles:
 - CEO**
 - VP of Finance**
 - VP of Global Sales/Sales Ops**
 - VP of Human Resources**
 - VP of Marketing**
 - VP of Services**
 - b. Access: **Viewer**
 - c. Click **Done**.

- E. Click **Close**.
2. Create the User Adoption dashboard with John Wiseman as the running user.
 - A. Click **New Dashboard**.
 - B. In View dashboard as, enter `John Wiseman`
3. Add a gauge component to show active users this week.
 - A. From the Components tab, drag the **Gauge** component into the first column.
 - B. Click the **Data Sources** tab, and in the Quick Find box, enter `users`
 - C. Drag the **No. of Users Logged in Last 7 Days** report onto the Gauge component.
 - D. Click on the **text** areas of the component to enter the corresponding information.
 - i. Edit Header: `Active Users`
 - ii. Edit Title: `Users Logging In`
 - iii. Edit Footer: `Number of users who have logged in over past 7 days.`
 - E. Click the **edit attributes** (wrench) icon on the component.
 - F. Click on the **Formatting** tab and enter the component settings, ignoring any red error messages that appear.
 - i. Minimum: 0
 - ii. Breakpoint 1: 20
 - iii. Breakpoint 2: 40
 - iv. Maximum: 60
 - G. Click **OK**.
4. Add a chart component to show new opportunities created in the last 120 days.
 - A. On the Data Sources tab, in the Quick Find box, enter `opportunities`
 - B. Drag the **Opportunities Created in Last 120 Days** report into the second column.
 - C. Click the **Components** tab, and drag the **Line Chart** component onto the source report in the second column.
 - D. Click on the **text** areas of the component to enter the corresponding information.
 - i. Edit Header: `Record Creation`
 - ii. Edit Title: `New Opportunities by Role`
 - iii. Edit Footer: `Number of new opportunities created in last 120 days.`
 - E. Click the **edit attributes** (wrench) icon on the component.
 - F. Click the **Component Data** tab, and from the Group By picklist, select **Auto**.
 - G. Click **OK**.
5. Add a table component to show roles who have not logged over the past 7 days.
 - A. From the Components tab, drag the **Table** component into the third column.
 - B. Click the **Data Sources** tab, and in the Quick Find box, enter `shame`

- C. Drag the **Wall of Shame** report onto the Table component.
- D. Click on the **text** areas of the component to enter the corresponding information.
 - i. Edit Header: Inactive Users
 - ii. Edit Title: Wall of Shame
 - iii. Edit Footer: Number of users per role who have not logged in over past 7 days.
- E. Click the **edit attributes** (wrench) icon on the component.
- F. Click on the **Formatting** tab, and from the Sort Rows By picklist, select **Value Descending**.
- G. Click **OK**.
- H. Click **Save**, and then complete the Save Dashboard details.
 - i. Title: User Adoption Dashboard
 - ii. Save To: **Executive Dashboards**
- I. Click Save and Run Dashboard.