Extend Reporting

Friday, October 09, 2015 1:20 PM

Creating Custom Report Types

Report Types - Predetermined combinations of related objects and their fields that used as starting points when building new custom reports.

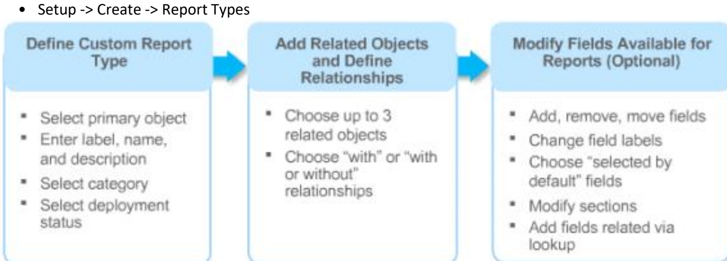
- The filters are based on the primary object in the report type.
- Report type also determines the default columns, and the objects and the fields available in the report.

Standard Report Types:

- Can be used for building reports on standard and custom objects and their related object.
- If a custom object is created that has "Allow Reports" enabled, Salesforce automatically generates standard report types for the new object and its related objects.
- "With" relationships are inner joins.

Custom Report Types:

- Enables creation of repot frameworks from which new custom reports can be built.
- They allow the admin to select combinations of up to 4 related objects.
- Modify how fields will appear in the Fields pane of the Report Builder.
- Setup -> Create -> Report Types



- The primary object is a very important component that determines which related objects can be included in the report type.
  - Primary object also determines which object appears in the Show filter and other filters in the Report Builder.
- Add Fields via Lookup option adds fields to the Report Type. The fields from the user record will be available in the report builder.

1. Avoid changing a custom report type from a "with" report type to a "with or without" report.
2. Adopt a consistent naming convention.
3. Build custom report types that address a wide variety of business requirements.

Building Exception Reports with Cross Filters

An exception report uses "Without" data to show where data doesn't exist.

Exception reports can be built using **cross filters** (Filters that enable filtering of the parent records in a report by their related child records using "With" or "Without" conditions.)

Subfilters provide an option to extend a cross filter by including only child records that meet certain criteria.

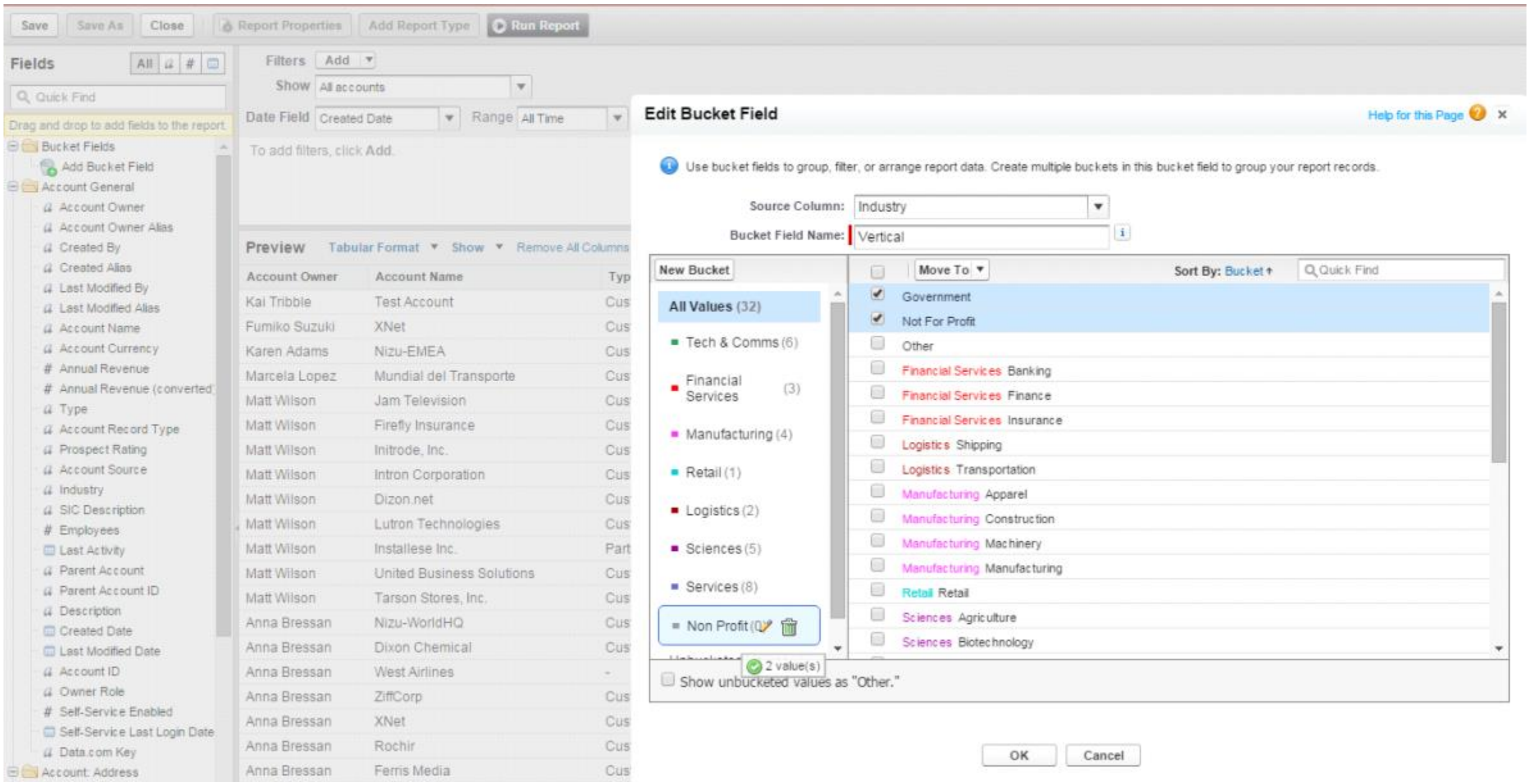
Categorizing Report Data with Bucket Fields

Bucketing - enables the segmentation of report data on the fly, by defining a set of categories, or "buckets", to sort, group, or filter the records.

Create a bucket field to categorize records based on their values in picklist, number and text fields.

Number - Group opportunities by sizes based on amounts

Analyze deals for specific reps on the sales dashboard. - Dashboard Filter
Categorize accounts as small, medium, or large based on employees. - Bucket Field
View opportunities without warranty products. - Cross Filter
View all positions with or without job applications. - Custom Report Type
Analyze the number of open cases for each week this year. - Analytic Snapshot
See the four-week moving average of the number of new cases. - PREVGROUPVAL Function
View position and candidate information on the same report. - Joined Report



Summarizing Multiple Groupings on a Report

PREVGROUPVAL function is used in custom summary formulas to return the value of a summary field from a previous grouping.
Function requires a summary field, grouping level, and an increment.

Embedded analytics lets admins add up to two report charts to a page.
Report charts are added to a page layout.
Report must:

- Be in summary format
- Contain a chart
- Use a report type with the ID field needed for filtering
- Be saved in a shared folder

Summarizing a Grouping's Share on a Report

PARENTGROUPVAL (Summary Field, Grouping Level) - a function used in custom summary formulas to return the value of a summary field from a specified parent grouping or grand total.

Use these to group sums by their parent.

Summarizing Changes to Data

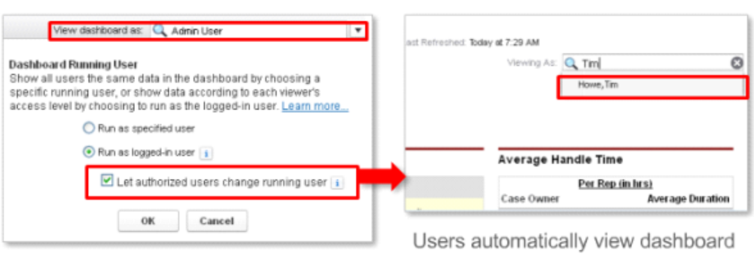
You can use a Workflow to Count Data Changes:

1. Create a custom count field.
2. Create a workflow field update top show the new count field when a change is made.
3. Create a report to summarize the count field.

You can use an App to provide data for charts.

Getting the Right Summaries on Dashboards

Dynamic Dashboards - displays the data of the user viewing it, rather than the data of a specified running user. Optionally, authorized users can change the running user directly from the dashboard view page.



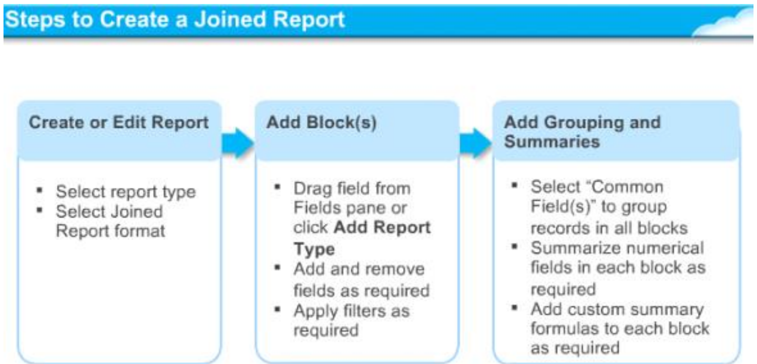
Activate dynamic dashboard in the Dashboard Builder.

Users automatically view dashboard as themselves. Users with "View My Team's Dashboards" permission can change view to another user.

Dashboard Filter - Allows viewers to change the data visible on the dashboard by selecting a filter value from a drop - down list.

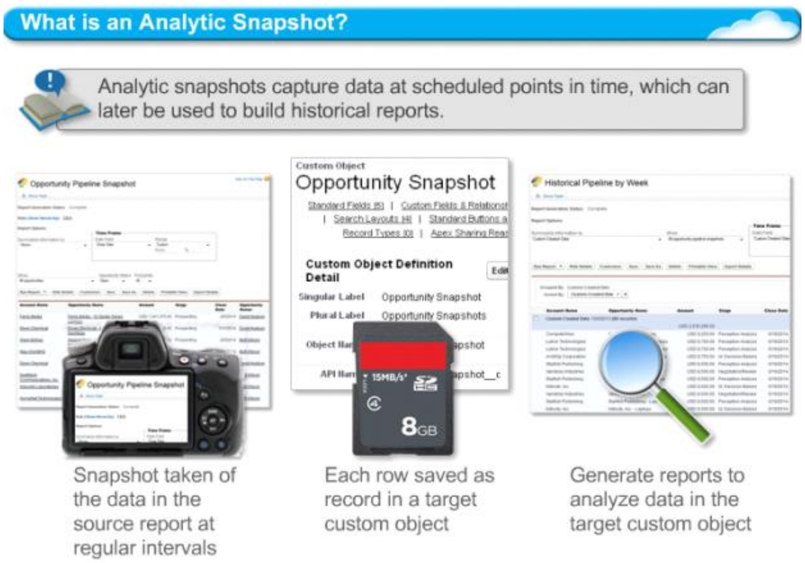
Building Joined Reports

Joined Reports allow for a combination of multiple views, or blocks of related information in a single report. Each block in the report can display data from the same, or from a different report type.



Analyzing Data Over Time

Analytic Snapshot:



An analytic snapshot can add up to 2,000 new records to the target object. To capture more than 2,000 rows of data, use multiple source reports and analytic snapshots.

Search for "analytics limits"