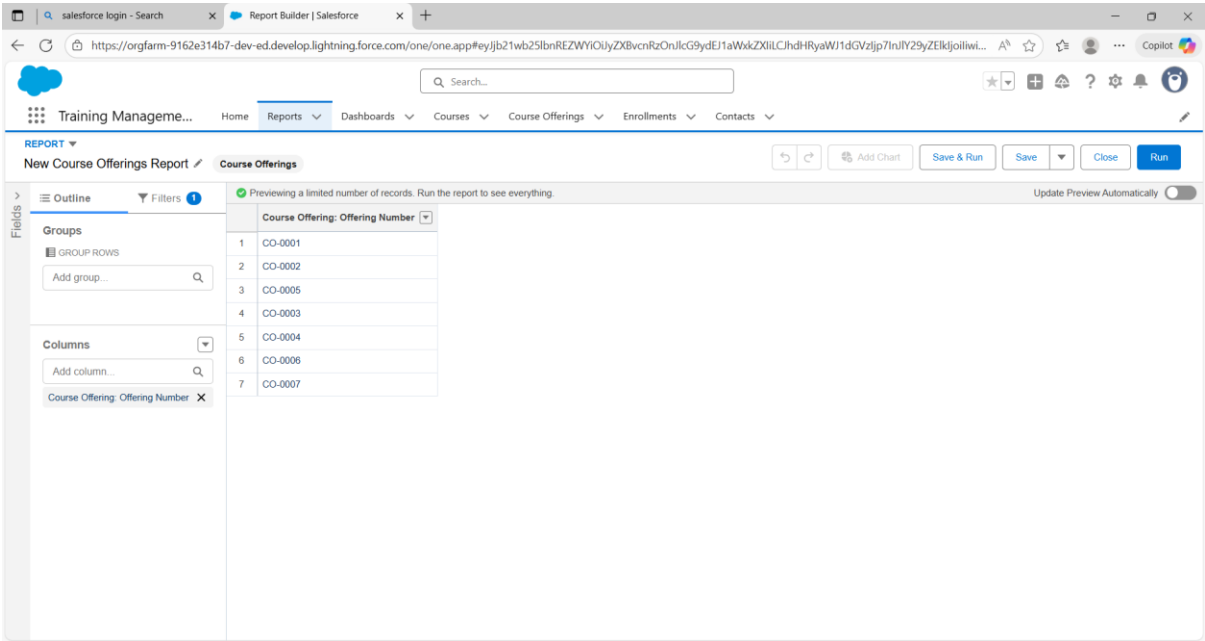
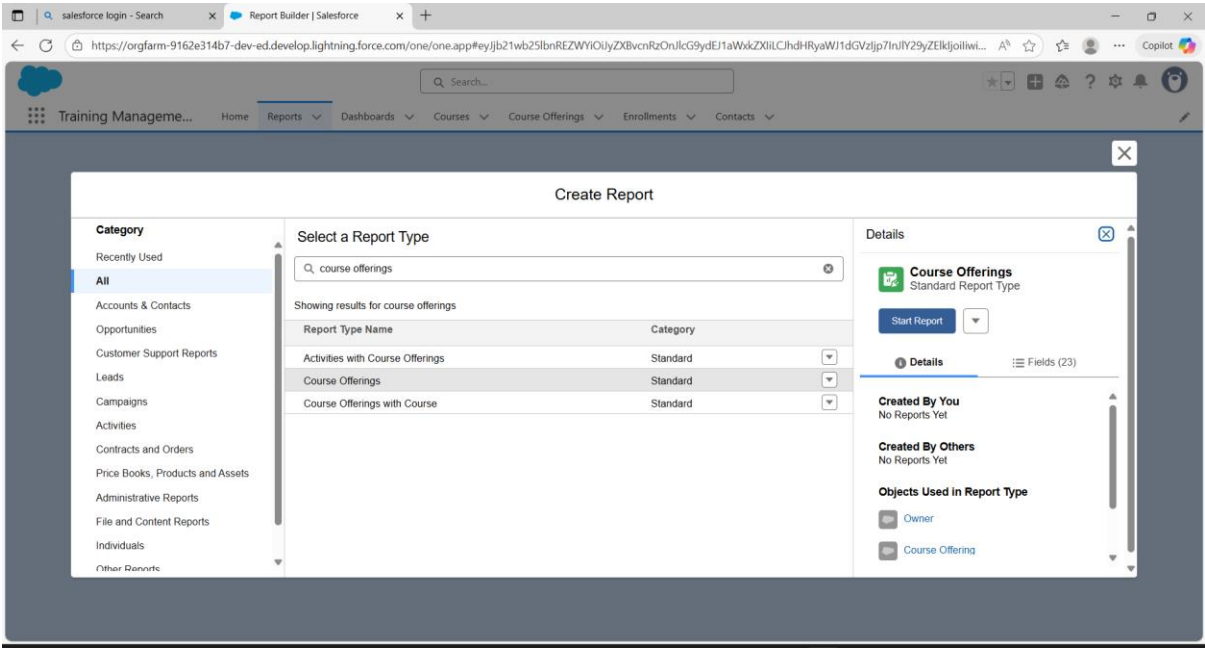


# Phase 9: Reporting & Dashboards

**Objective:** Create comprehensive reports and interactive dashboard for training management analytics.

## Section 1:

### Create Report 1 - Course Enrollment Summary



Added Columns to Report

Report: Course Offerings

New Course Offerings Report

Enable Field Editing

Search

Add Chart

Filter

Refresh

Edit

Total Records

7

Total Capacity

170

Total Enrolled Count

9

Total Available Seats

161

	Course Offering: Offering Number	Course	Start Date	End Date	Location	Instructor	Capacity	Enrolled Count	Available Seats	Status
1	CO-0007	Sales Cloud Fundamentals	10/18/2025	10/22/2025	Conference Room B, Building 1, Floor 3	Sahithi Karise	30	0	30	Open
2	CO-0003	Sales Cloud Fundamentals	10/13/2025	10/15/2025	Conference Room A, Building 1, Floor 3	Sahithi Karise	25	0	25	Open
3	CO-0005	Leadership and Communication Skills	10/16/2025	10/16/2025	Executive Meeting Room, Building 1, Floor 5	Sahithi Karise	30	3	27	Open
4	CO-0001	Salesforce Administration Basics	10/10/2025	10/12/2025	Conference Room A	Sahithi Karise	25	6	19	Open
5	CO-0006	Lightning Web Components Development	10/26/2025	10/29/2025	Developer Lab, Building 2, Floor 1	John Instructor	20	0	20	Open
6	CO-0004	Advanced Apex Programming	10/21/2025	10/24/2025	Training Lab 2, Building 3, Floor 2	John Instructor	15	0	15	Open
7	CO-0002	DSA	10/15/2025	10/30/2025	Conference Room B	John Instructor	25	0	25	Open
8							170	9	161	

Step 5: Added Groupings and Filters

REPORT

New Course Offerings Report

Course Offerings

Add Chart

Save & Run

Save

Close

Run

Previewing a limited number of records. Run the report to see everything.

Update Preview Automatically

Outline

Filters

Filters

Open (7)

CO-0001

Filter By

Field

Start Date

Operator

greater or equal

Type

Date

10/6/2025

Locked

Cancel

Apply

Status	Course Offering: Offering Number	Course	Start Date	End Date	Location	Instructor	Capacity	Enrolled Cour
Open (7)	CO-0001	Salesforce Administration Basics	10/10/2025	10/12/2025	Conference Room A	Sahithi Karise	25	
		DSA	10/15/2025	10/30/2025	Conference Room B	John Instructor	25	
		Leadership and Communication Skills	10/16/2025	10/16/2025	Executive Meeting Room, Building 1, Floor 5	Sahithi Karise	30	
		Sales Cloud Fundamentals	10/13/2025	10/15/2025	Conference Room A, Building 1, Floor 3	Sahithi Karise	25	
		Advanced Apex Programming	10/21/2025	10/24/2025	Training Lab 2, Building 3, Floor 2	John Instructor	15	
		Lightning Web Components Development	10/26/2025	10/29/2025	Developer Lab, Building 2, Floor 1	John Instructor	20	
		Sales Cloud Fundamentals	10/18/2025	10/22/2025	Conference Room B, Building 1, Floor 3	Sahithi Karise	30	
							170	
							170	

Row Counts

Detail Rows

Subtotals

Grand Total

Conditional Formatting

## Final Course Enrollment Summary Report

Report: Course Offerings

### Course Enrollment Summary

Summary of all course offerings with enrollment counts and capacity information

[Enable Field Editing](#) [Add Chart](#) [Print](#) [Refresh](#) [Edit](#)

Total Records	Total Capacity	Total Enrolled Count	Total Available Seats
7	170	9	161

Status	Course Offering: Offering Number	Course	Start Date	End Date	Location	Instructor	Capacity	Enrolled Count	Available Seats
Open (7)	CO-0003	Sales Cloud Fundamentals	10/13/2025	10/15/2025	Conference Room A, Building 1, Floor 3	Sahithi Karise	25	0	25
	CO-0007	Sales Cloud Fundamentals	10/18/2025	10/22/2025	Conference Room B, Building 1, Floor 3	Sahithi Karise	30	0	30
	CO-0005	Leadership and Communication Skills	10/16/2025	10/16/2025	Executive Meeting Room, Building 1, Floor 5	Sahithi Karise	30	3	27
	CO-0001	Salesforce Administration Basics	10/10/2025	10/12/2025	Conference Room A	Sahithi Karise	25	6	19
	CO-0004	Advanced Apex Programming	10/21/2025	10/24/2025	Training Lab 2, Building 3, Floor 2	John Instructor	15	0	15
	CO-0006	Lightning Web Components Development	10/26/2025	10/29/2025	Developer Lab, Building 2, Floor 1	John Instructor	20	0	20
	CO-0002	DSA	10/15/2025	10/30/2025	Conference Room B	John Instructor	25	0	25
Subtotal							170	9	161
Total (7)							170	9	161

Row Counts

☒ Detail Rows ☒ Subtotals ☒ Grand Total

## Section 2:

## Create Report 2 - Participant Enrollment History

The screenshot shows the Salesforce Training Management application. At the top, there's a navigation bar with tabs for 'salesforce login - Search', 'Report Builder | Salesforce', and a plus sign for more options. Below this is a browser address bar showing the URL: https://orgfarm-9162e314b7-dev-ed.develop.lightning.force.com/one/app#eyJjb21wb25lbnREZWY0IjYXBvcnRzOnJlcG9ydE1aWxkZXIiLCJhdHRyaWI1dGVzjp77NlY29yZElkjoiliwi... . The main header area includes a search bar and several icons for navigation and settings.

The 'Training Manage...' sidebar on the left lists various categories under 'Reports':

- Recently Used
- All (highlighted)
- Accounts & Contacts
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities
- Contracts and Orders
- Price Books, Products and Assets
- Administrative Reports
- File and Content Reports
- Individuals
- Other Reports

The main content area displays the 'Create Report' dialog:

### Create Report

**Select a Report Type**

Search: enr

Showing results for enr

Report Type Name	Category
Activities with Enrollments	Standard
<b>Enrollments</b>	Standard
Enrollments with Course Offering	Standard
Enrollments with Participant	Standard
Enrollment History	Standard

**Details**

**Enrollments**  
Standard Report Type

**Start Report**

**Details** Fields (20)

**Created By You**  
No Reports Yet

**Created By Others**  
No Reports Yet

**Objects Used in Report Type**

- Owner
- Enrollment

Added Columns

Report Builder | Salesforce

https://orgfarm-9162e314b7-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWY0iYjZXBvcnRzOnJlcG9ydEJ1aWxkZXIiLCJhdHRyaWJ1dGVzjp7InJlY29yZElkji...

Training Managemen...

Home Reports Dashboards Courses Course Offerings Enrollments Contacts

REPORT New Enrollments Report Enrollments

Previewing a limited number of records. Run the report to see everything.

Fields

Show Fields

Filters

Groups

Columns

Enrollment: Enrollment Number

Participant

Course Offering

Enrollment Date

Status

# Attendance Marked

# Certificate Sent

	Enrollment: Enrollment Number	Participant	Course Offering	Enrollment Date	Status	Attendance Marked	Certificate Sent
1	ENR-00015	David Brown	CO-0005	10/6/2025	Confirmed		
2	ENR-00014	Lisa Anderson	CO-0006	10/6/2025	Registered		
3	ENR-00018	Lisa Anderson	CO-0003	10/6/2025	Registered		
4	ENR-00013	Jennifer Garcia	CO-0007	10/6/2025	Registered		
5	ENR-00016	Emily Davis	CO-0004	10/6/2025	Registered		
6	ENR-00017	Jennifer Garcia	CO-0003	10/6/2025	Confirmed		
7	ENR-00019	Emily Davis	CO-0007	10/6/2025	Confirmed		
8						0	0

Added Grouping by Participant

Report Builder | Salesforce

https://orgfarm-9162e314b7-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWY0iYjZXBvcnRzOnJlcG9ydEJ1aWxkZXIiLCJhdHRyaWJ1dGVzjp7InJlY29yZElkji...

Training Managemen...

Home Reports Dashboards Courses Course Offerings Enrollments Contacts

REPORT New Enrollments Report Enrollments

Previewing a limited number of records. Run the report to see everything.

Fields

Outline

Filters

Groups

Columns

Participant

Enrollment: Enrollment Number

Course Offering

Enrollment Date

Status

# Attendance Marked

# Certificate Sent

Participant	Enrollment: Enrollment Number	Course Offering	Enrollment Date	Status	Attendance Marked	Certificate Sent
David Brown (1)	ENR-00015	CO-0005	10/6/2025	Confirmed		
Subtotal					0	0
Emily Davis (2)	ENR-00016	CO-0004	10/6/2025	Registered		
	ENR-00019	CO-0007	10/6/2025	Confirmed		
Subtotal					0	0
Jennifer Garcia (2)	ENR-00013	CO-0007	10/6/2025	Registered		
	ENR-00017	CO-0003	10/6/2025	Confirmed		
Subtotal					0	0
Lisa Anderson (2)	ENR-00014	CO-0006	10/6/2025	Registered		
	ENR-00018	CO-0003	10/6/2025	Registered		
Subtotal					0	0
Total (7)					0	0

Row Counts

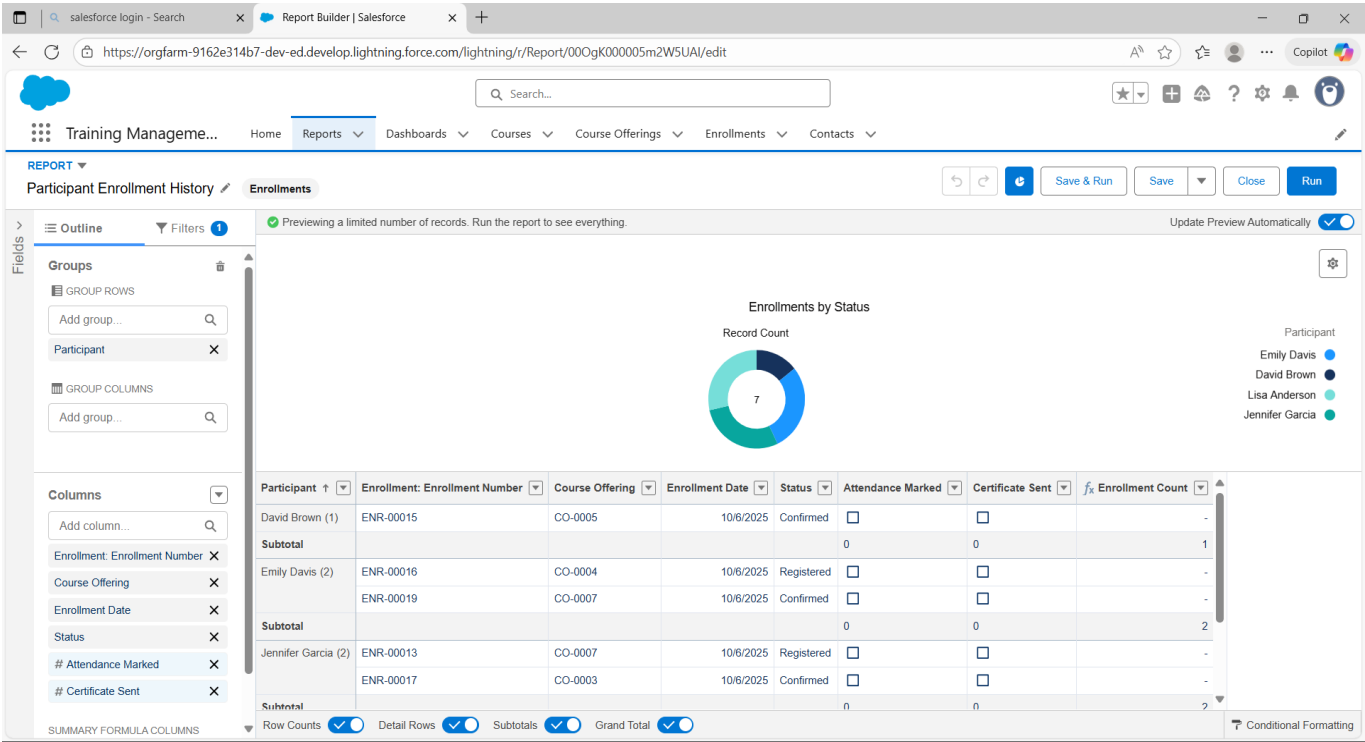
Detail Rows

Subtotals

Grand Total

Conditional Formatting

Added Chart to Report



Section 3:

Create Report 3 - Course Capacity Utilization

The screenshot shows the "Create Report" dialog in the Salesforce Report Builder. The "Category" dropdown is set to "Recently Used". The "Select a Report Type" section shows a search bar and a table of "Recently Used Report Types". The table has columns "Report Type Name" and "Category". The "Details" section shows the "Course Offerings" report type, which is a "Standard Report Type". It includes a "Start Report" button and a "Details" link. The "Created By You" section shows "Course Enrollment Summary". The "Created By Others" section shows "No Reports Yet". The "Objects Used in Report Type" section shows "Owner" and "Course Offering".

Report Type Name	Category
Enrollments	Standard
Course Offerings	Standard

Added Formula Field for Utilization Percentage

Report Builder | Salesforce

https://orgfarm-9162e314b7-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWY0IjYXBvcnRzOnJlcG9ydEJ1aWxkZXIiLCJhdHRyaWJ1dGVzZjpw7InJlY29yZElkjoilwi...

Training Managemen...

Home Reports Dashboards Courses Course Offerings Enrollments Contacts

REPORT

New Course Offerings Report Course Offerings

Search all fields...

Summary Formulas (0)

Course Offering: Info (23)

Course Offering: ID

Course Offering: Offering Number

Available Seats

Capacity

Course

End Date

End Time

Enrolled Count

Instructor

Location

Start Date

Start Time

Status

Course Offering: Owner Name

Course Offering: Owner Alias

Course Offering: Owner Role

Course Offering: Created By

Course Offering: Created Alias

Fields

Functions

Search Fields

Course Offering: Info (20)

Course Offering: Offering Number

Available Seats

Capacity

Course

End Date

Enrolled Count

Instructor

Location

Start Date

Status

Column Name

Utilization Percentage

Description

Percentage of capacity

Formula Output Type

Number

Decimal Points

0

Formula

1 (Course\_Offering\_\_c.Enrolled\_Count\_\_c / Course\_Offering\_\_c.Capacity\_\_c) \* 100

Valid

Cancel

Apply

Update Preview Automatically

Report Builder | Salesforce

Report: Course Offerings

https://orgfarm-9162e314b7-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWY0IjYkZkVncnRzOnJlcG9ydEJ1aWwkdXNlLCJhdHRyaWJ1dGVzjp7InJlY29yZElkji...

Search...

Star Add Help ? Settings Notifications Profile

Training Manage...

Home Reports Dashboards Courses Course Offerings Enrollments Contacts

Report: Course Offerings

New Course Offerings Report

Enable Field Editing Search Add Chart Filter Refresh Edit

Total Records7

Total Capacity170

Total Enrolled Count9

Total Utilization Percentage34

	Course Offering: Offering Number	Course	Start Date	End Date	Location	Instructor	Capacity	Enrolled Count	fx Utilization Percentage	Stat
1	CO-0007	Sales Cloud Fundamentals	10/18/2025	10/22/2025	Conference Room B, Building 1, Floor 3	Sahithi Karise	30	0	0	Ope
2	CO-0003	Sales Cloud Fundamentals	10/13/2025	10/15/2025	Conference Room A, Building 1, Floor 3	Sahithi Karise	25	0	0	Ope
3	CO-0005	Leadership and Communication Skills	10/16/2025	10/16/2025	Executive Meeting Room, Building 1, Floor 5	Sahithi Karise	30	3	10	Ope
4	CO-0001	Salesforce Administration Basics	10/10/2025	10/12/2025	Conference Room A	Sahithi Karise	25	6	24	Ope
5	CO-0006	Lightning Web Components Development	10/26/2025	10/29/2025	Developer Lab, Building 2, Floor 1	John Instructor	20	0	0	Ope
6	CO-0004	Advanced Apex Programming	10/21/2025	10/24/2025	Training Lab 2, Building 3, Floor 2	John Instructor	15	0	0	Ope
7	CO-0002	DSA	10/15/2025	10/30/2025	Conference Room B	John Instructor	25	0	0	Ope
8							170	9	34	

# Final Course Capacity Utilization Report

Report: Course Offerings

**Course Capacity Utilization**

Analyze capacity utilization rates for all open course offerings

Enable Field Editing

Q

Add Chart

Y

↺

Edit

Total Records

7

Total Capacity

170

Total Enrolled Count

9

Total Utilization Percentage

34

	Course Offering: Offering Number	Course	Start Date	End Date	Location	Instructor	Capacity	Enrolled Count	Utilization Percentage
1	CO-0001	Salesforce Administration Basics	10/10/2025	10/12/2025	Conference Room A	Sahithi Karise	25	6	24
2	CO-0005	Leadership and Communication Skills	10/16/2025	10/16/2025	Executive Meeting Room, Building 1, Floor 5	Sahithi Karise	30	3	10
3	CO-0003	Sales Cloud Fundamentals	10/13/2025	10/15/2025	Conference Room A, Building 1, Floor 3	Sahithi Karise	25	0	0
4	CO-0007	Sales Cloud Fundamentals	10/18/2025	10/22/2025	Conference Room B, Building 1, Floor 3	Sahithi Karise	30	0	0
5	CO-0004	Advanced Apex Programming	10/21/2025	10/24/2025	Training Lab 2, Building 3, Floor 2	John Instructor	15	0	0
6	CO-0006	Lightning Web Components Development	10/26/2025	10/29/2025	Developer Lab, Building 2, Floor 1	John Instructor	20	0	0
7	CO-0002	DSA	10/15/2025	10/30/2025	Conference Room B	John Instructor	25	0	0
8							170	9	34

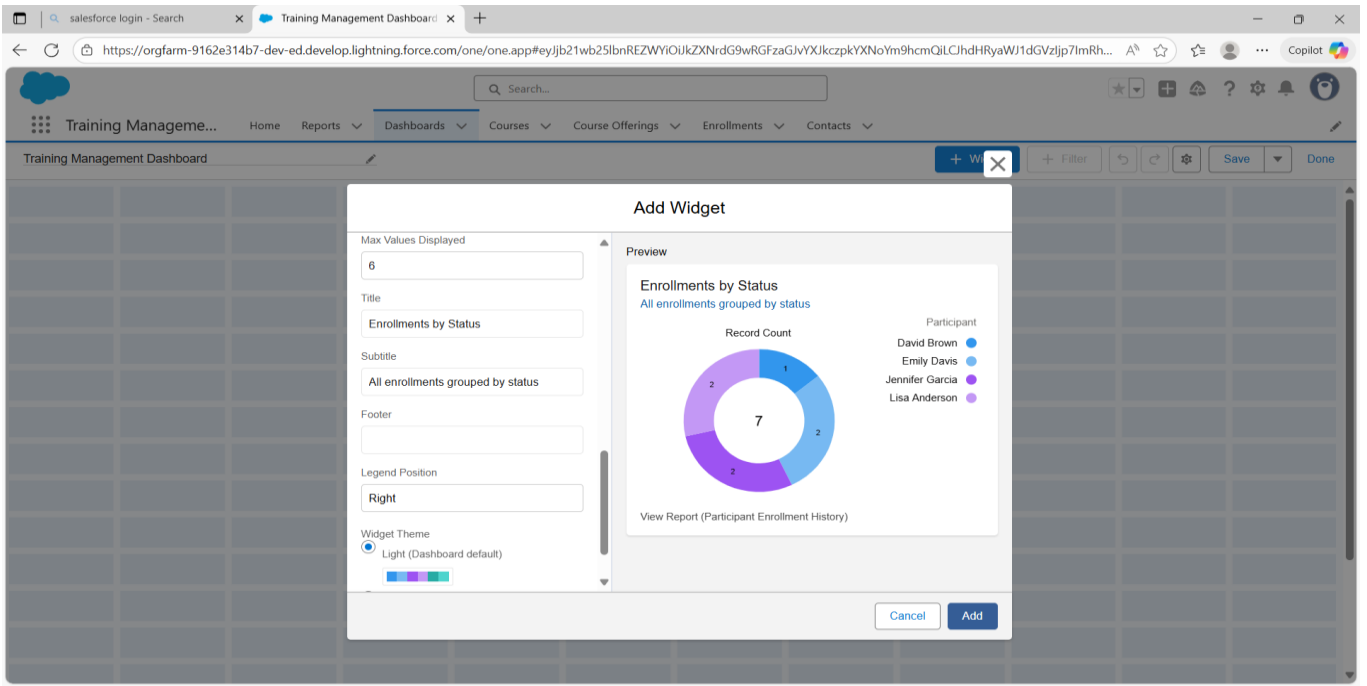
## Section 4:

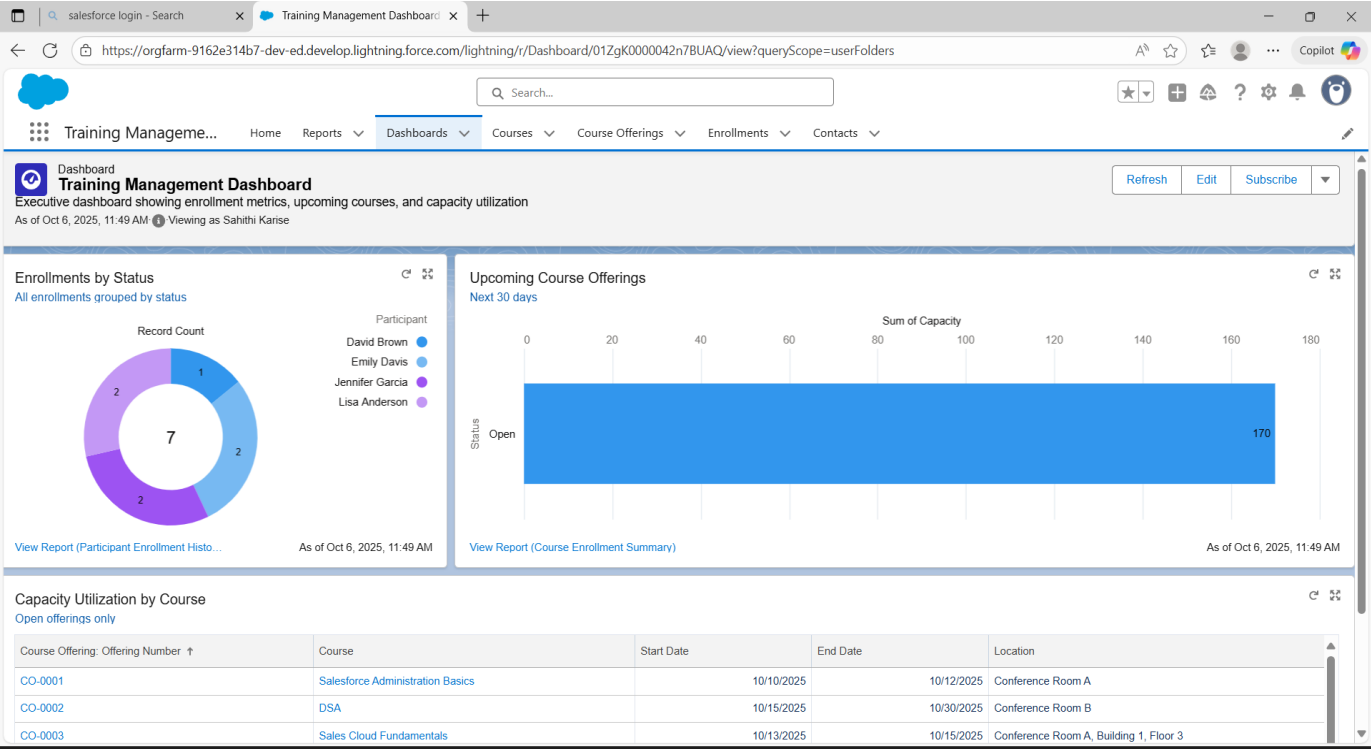
## Create Dashboard

Added Component 1 - Enrollment by Status Chart

Added Component 2 - Upcoming Courses Bar Chart

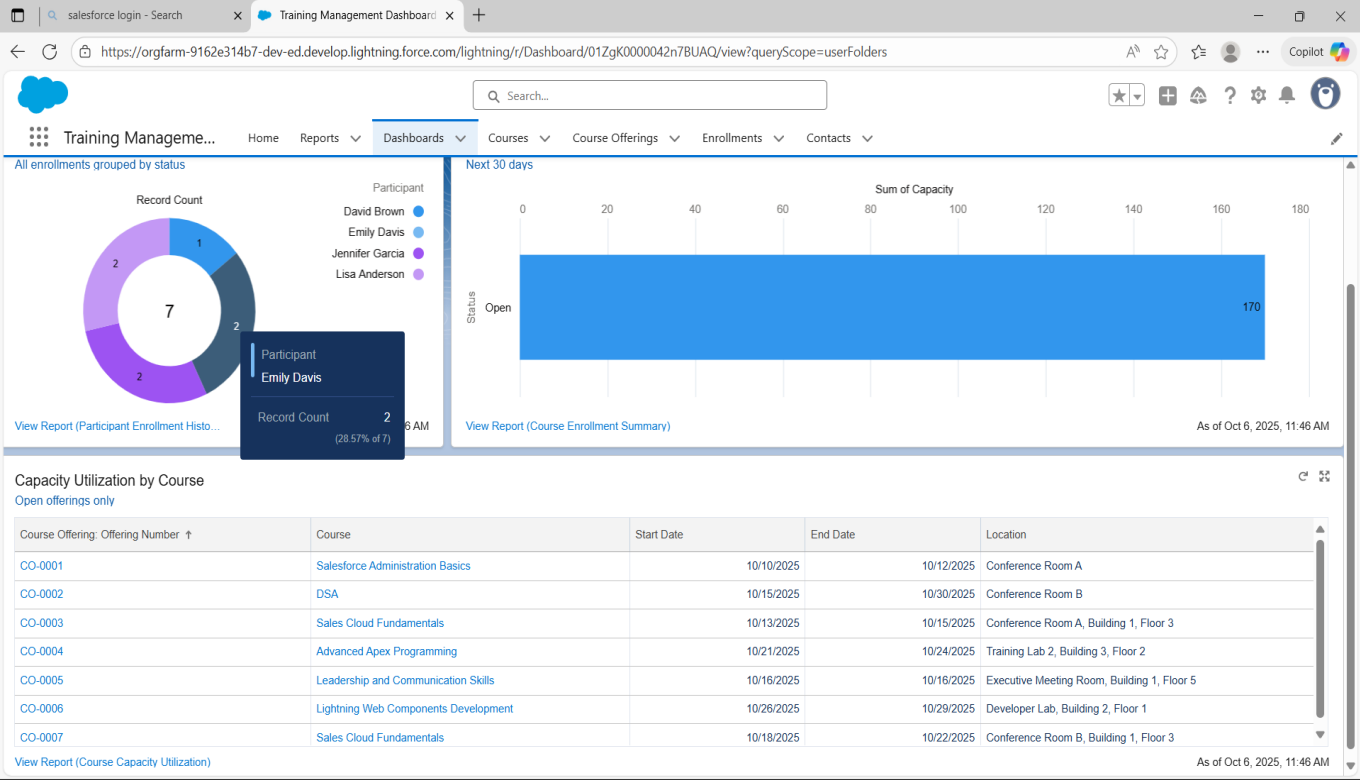
Added Component 3 - Capacity Utilization Table



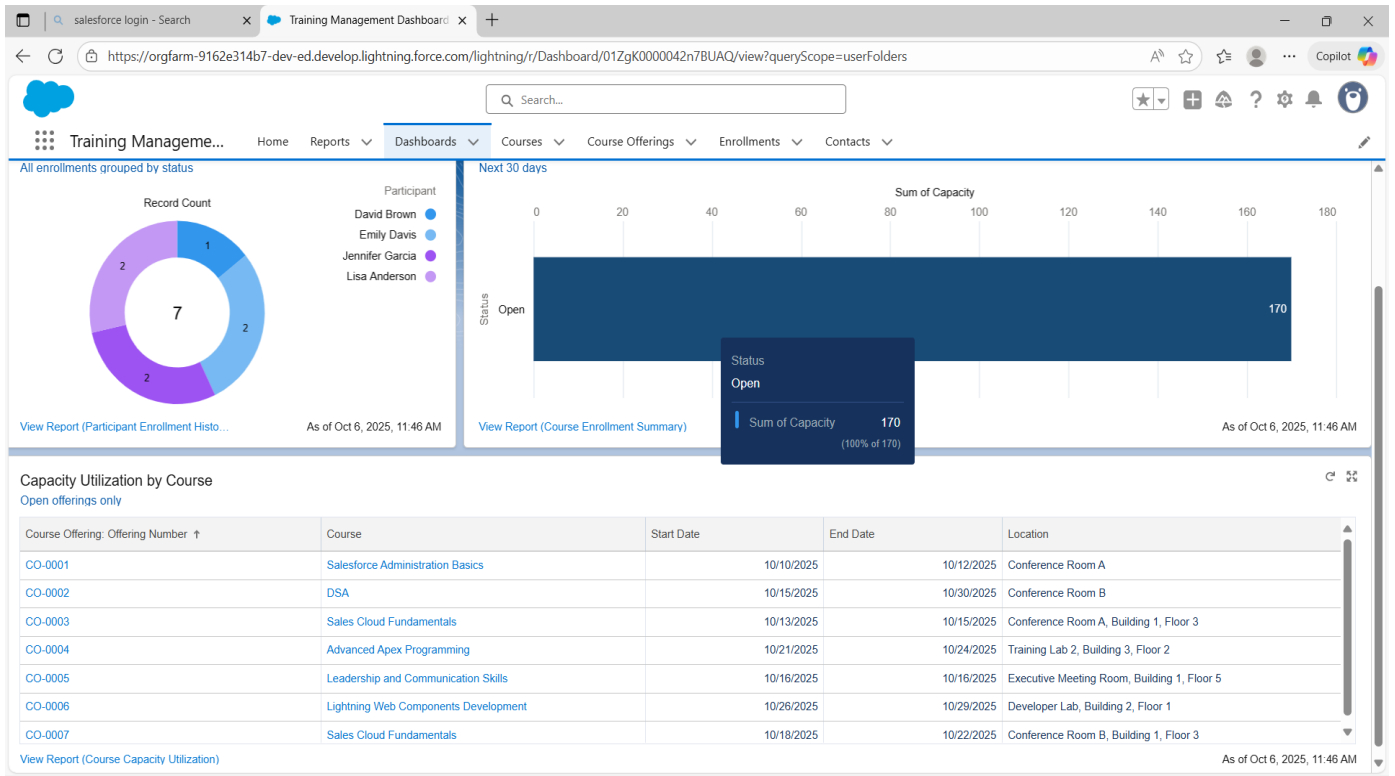


Section 5:

Test Dashboard Interactivity







## Summary

### Reports Developed:

#### 1. Course Enrollment Summary Report

- Purpose: Monitor all course offerings and enrollment status
- Key Features: Grouped by status, filtered for upcoming courses, shows capacity metrics
- Use Case: L&D administrators can quickly see which courses need attention

#### 2. Participant Enrollment History Report

- Purpose: Track individual participant training history
- Key Features: Grouped by participant, includes donut chart, shows completion status
- Use Case: HR can view employee training records for performance reviews

#### 3. Course Capacity Utilization Report

- Purpose: Analyze course popularity and resource optimization
- Key Features: Custom formula for utilization %, sorted by demand, filtered for active courses
- Use Case: Identify underutilized courses and optimize scheduling

### Dashboard Implementation:

#### Training Management Dashboard provides:

- At-a-glance view of enrollment metrics

- Visual representation using charts
- Table view of upcoming courses
- Real-time data updates
- Mobile-responsive design
- Subscription capability for daily updates

**Business Value:**

- Improved decision-making with visual analytics
- Real-time visibility into training operations
- Data-driven capacity planning
- Better resource allocation
- Enhanced stakeholder communication

**Technical Skills Demonstrated:**

- Report formula creation
- Data grouping and summarization
- Chart configuration
- Dashboard component design
- Filter implementation
- Mobile optimization