



Adoption Trendz 1.0 – Read Me 1st

Adoption Trendz is simple to use but it does require some initial administrative configuration. You will need to schedule your snapshots to run each night and set the running user for each snapshot. You may also want to configure additional snapshots, which will require creating a source report and the snapshot itself.

Installing Adoption Trendz

Installing a package from the AppExchange is simple, just browse to AppExchange.com search for "Adoption Trendz", review the offering details, and click the get it now button. You will be asked to login, as an administrator, to the salesforce org in which you want to install the package.

You will then be presented with the package installation details. Review the package components to verify that there are no conflicts and click “continue”. Follow the wizard to modify package permissions, choose the security level, and finally install a package.

Package Installation Details [Help for this Page](#)

| | |
|----------------|--|
| Package Name | Adoption Trendz |
| Version Name | Adoption Trendz |
| Version Number | 1.2 |
| Publisher | Salesforce.com |
| Description | Unmanaged package used to track user adoption trends by monitoring the creation or editing of specific data elements (Activities, Leads, Opportunities and Cases). This package includes includes 7 Report Types, 4 "source" Report, 6 "end-user" Reports, 4 Analytic Snapshots, 1 Custom Object (Adoption Trend) and the Adoption Trends dashboard. This package also includes a document titled "Adoption Trendz 1.0 - Read Me 1st", which is saved in the Adoption Trends document folder. Administrators should read this document which explains important information regarding the required scheduling of Analytic Snapshot jobs. IMPORTANT: This package is intended to be used in combination with Analytic Snapshot jobs, scheduled to run on a nightly basis. If these Analytic Snapshot jobs are not scheduled, no data will be collected and the dashboard will yield no results. |

[Continue](#) [Cancel](#)

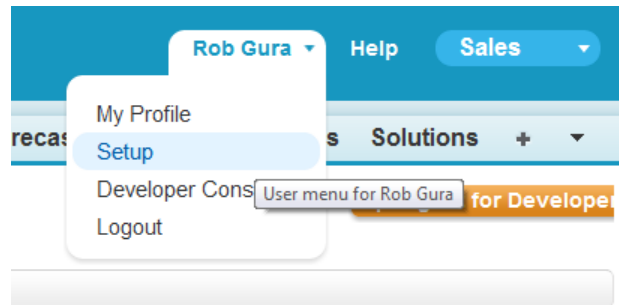
Package Components

▼ Resources (28)

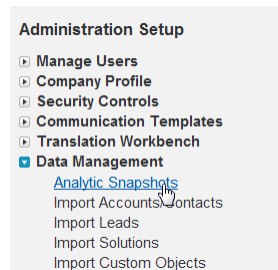
| Action | Component Name | Parent Object | Component Type | Installation Notes |
|--------|-----------------------------------|----------------------|-------------------|--------------------------------|
| Create | AT: Activities | AT_Adoption_Trend__c | Analytic Snapshot | This is a brand new component. |
| Create | AT: Activities by User (Snapshot) | | Report | This is a brand new component. |

Configuring Adoption Trendz snapshots

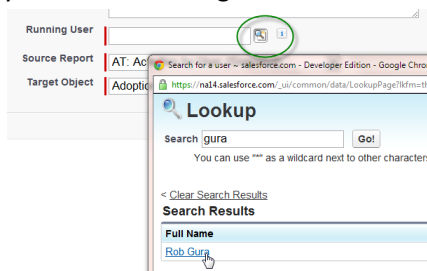
After installing Adoption Trendz from the AppExchange, sign on as an administrator and enter setup mode.



From setup navigate to Administration Setup → Data Management → Analytic Snapshots. You will need to configure each snapshot for which you want to collect statistics.



1. Click on AT: Activities, then click edit
2. In the running user field, click the Lookup icon, and search for the salesforce user who will run the source report. Typically, this is an administrative user who has view all data access within your salesforce org.



3. Click the save button.

4. Scroll down the screen to the Schedule Analytic Snapshot section.
5. Click edit.
6. set the frequency to daily, set the start date to today, and select the end date to a date arbitrarily in the distant future, such as January 1, 2015.
7. Next to the field preferred start time, click find available options.
8. Choose an available time after normal business hours, but before midnight.
9. Click the save button.
10. Repeat this process for each additional snapshot: Accounts, Contacts, Leads, Opportunities, Cases, etc.

Schedule Analytic Snapshot [Save] [Cancel]

Email Analytic Snapshot ☒ To me ☐ To others...

Scheduled Run

Frequency: ☒ Daily ☐ Weekly ☐ Monthly ☐ Every weekday ☐ Every day

Start: 4/19/2012 [4/19/2012]

End: 1/1/2015 [4/19/2012]

Preferred Start Time: 8:00 PM [8:00 PM]

Exact start time will depend on job queue activity.

When you're finished, you should see a list of each scheduled analytic snapshot, with the next run date and time listed.

Analytic Snapshots

[Help for this Page](#) ?

Analytic snapshots allow you to load data from a custom report to a custom object on a regularly scheduled basis. Analytic snapshots enable you to work with report data as you would with other records in salesforce.com.

View: **All Analytic Snapshots** [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

| New Analytic Snapshot | | | | |
|--|-----------------------------------|--|--------------------------|-------------------|
| Action | Name + | Description | Scheduled | Next Run |
| Edit Del | AT: Activities | Adoption statistics for Tasks and Events | ✓ | 4/19/2012 8:28 PM |
| Edit Del | AT: Cases | Adoption statistics for Cases | <input type="checkbox"/> | |
| Edit Del | AT: Leads | Adoption statistics for Leads | <input type="checkbox"/> | |
| Edit Del | AT: Opportunities | Adoption statistics for Opportunities | <input type="checkbox"/> | |

Capturing additional statistics

If you would like to monitor additional objects beyond those included in the Adoption Trendz package, you can create your own source reports and save the data to the existing adoption trend object. Your additional statistics will be automatically included in the Adoption Trendz dashboard.

To do this, take the following actions:

1. Create a source report type.
2. Create a source report.
3. Create an additional analytic snapshot.
4. Map the data elements from your source report into the adoption trend object.
5. Schedule your new analytic snapshot.

Creating a source Report Type

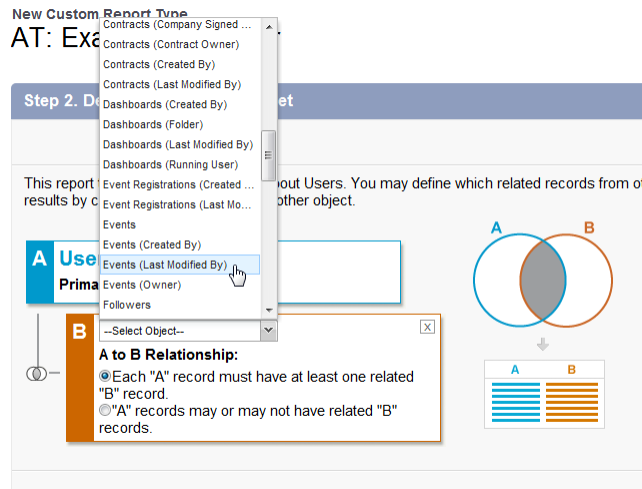
- Setup → App Setup → Create → Report Types
- Click “New Custom Report Type”
- **IMPORTANT:** Select **Users** as the primary object
- Label your report type **AT: {your_object_name} by User**
- enter a description
- Choose **Administrative Reports** under store in category
- Finally, make certain that you have set the Deployment Status to “deployed”

The screenshot shows a web form for creating a report type. It is divided into several sections with light blue headers:

- Report Type Focus:** Contains instructions to specify the type of records (rows) that will be the focus of reports. An example is provided: "If reporting on 'Contacts with Opportunities with Partners,' select 'Contacts' as the primary object." Below this is a dropdown menu for "Primary Object" with "Users" selected.
- Identification:** Contains fields for:
 - Report Type Label:** A text field with the value "AT: Examples by User".
 - Report Type Name:** A text field with the value "AT_Examples_by_User" and an information icon.
 - Description:** A text area with the value "My Description". A note above the field states: "Note: Description will be visible to users who create reports."
 - Store in Category:** A dropdown menu with "Administrative Reports" selected.
- Deployment:** Contains a note: "A report type with deployed status is available for use in the report wizard. While in development, report types are only available to authorized administrators and their delegates."

- Click next
- Define the Relationship from the User Object to Your New Custom Object.

- **IMPORTANT:** be certain to select the relationship from Users to the **Last Modified By** field in your custom object. For example, if my custom object was named **Events**, I would want to choose the field **Events (Last Modified By)**.

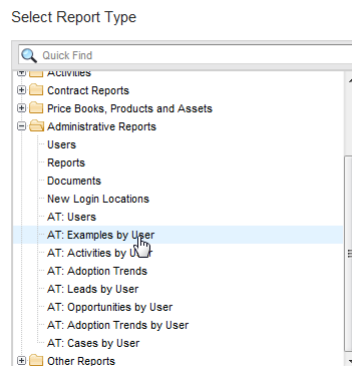


- Click Save
- After defining the relationship, you can optionally specify which fields will be available for reports associated with this custom report type.

Creating a source Report

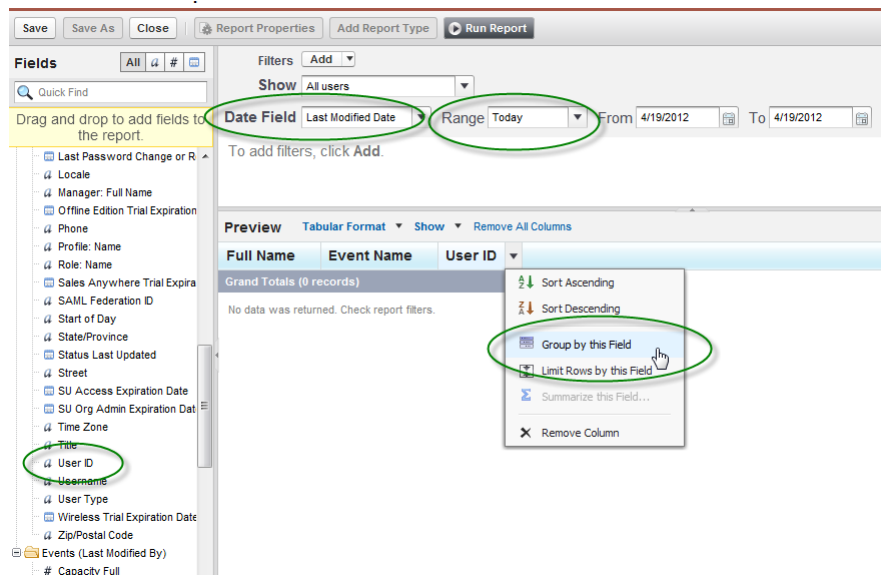
- Now that you've built a report type specifying the relationship between users and your custom object, you can build a source report.
- Click the Reports tab, then click "new report".
- Expand the folder administrative reports, and choose the report type that you created above

Create New Report



- In the standard report filters, under date field, choose **Last Modified Date** from your custom object (not the users object)
- Choose the date range "Today" for the **Last Modified Date** field
- Add the user ID from the users object to your report and group by this field

- Save your report, naming it “AT: {your_object_name} by User (Snapshot)”
- Choose the Adoption Trendz folder when saving your report



Creating and scheduling your analytic snapshot

- From setup navigate to Administration Setup → Data Management → Analytic Snapshots.
- Click new analytic snapshot
- Name your snapshot AT: {your_object_name}, while the name of the snapshot is somewhat arbitrary, following this example this is the name that will appear in your reports and on your dashboard.

- Specify the running user as an administrative user who has view all data access.
- Choose the report that you created in the above example has your source report and adoption trend as your target object.
- Click “Save & Edit Field Mappings”.

New Analytic Snapshot

Edit Analytic Snapshot [Save] [Save & Edit Field Mappings] [Cancel]

Enter information about this analytic snapshot.

Analytic Snapshot Name | AT: Examples

Analytic Snapshot Unique Name | AT_Examples

Description

Running User | Rob Gura

An analytic snapshot runs a source report, then loads the report data as records into a target object. Select a s

Source Report **Target Object**

Source Report | AT: Examples by User (Snapshot)

Target Object | Adoption Trend

[Save] [Save & Edit Field Mappings] [Cancel]

- Under the source report summary grouping level, choose Grouping 1: User ID
- Map User ID to field “editing user”
- Map Analytic Snapshot Name to the field “object”
- Map Record Count to the field “record count”
- Map Execution Time to the field “snapshot date”
- And Save your field mapping

1. Select Source Report Summary Grouping Level

You have selected a summary report as your source. Summary report records may be grouped into one to three levels. If one grouping level, select the level at which summary data should be extracted.

Grouping Level

☐ Grand Summary

☒ Grouping 1: User ID

2. Map Summary Fields from Source Report to Target Object

Data loaded into the target object will be taken only from summary fields: sum, average, largest value, smallest value. Set source report that you want to map to the target object. You can assign the same source report field to more than one target object.

| Fields from Source Report | Map to | Fields in Target Object |
|---------------------------------|--------|------------------------------|
| AT: Examples by User (Snapshot) | | Adoption Trendz |
| User ID | → | Editing User (Lookup(User)) |
| Analytic Snapshot Name | → | Object (Text(80)) |
| --Load No Data-- | → | Owner (Lookup(User,Group)) |
| Record Count [Record Count] | → | Record Count (Number(18, 0)) |
| Execution Time | → | Snapshot Date (Date/Time) |

Finally, schedule your snapshot to run just as you did when configuring the snapshots included in the Adoption Trendz package at the very beginning of this document.

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Important configuration notes

- For each object which you would like to collect statistics and analytic snapshot must be configured and scheduled.
- The running user associated with each snapshot must have access to all data in your system, otherwise only partial statistics will be collected.
- The Adoption Trendz package does not accommodate tracking multiple edits for the same record on the same day. For example, if the user Mike Jones creates a new case in edits that case three times on the same day, only one activity is recorded for that day. Similarly, if different users modify the same record on the same day, only the user who last edited that record on a given day is recorded. This is because the snapshot is scheduled to run only once per day and therefore only picks up the last modified user change at the time that the snapshot runs.
- When scheduling your analytic snapshots, be careful to select a time that occurs after normal business hours but before midnight. If the snapshot is run after midnight, it might identify zero records added or edited that day. This is because the snapshot is running the report using the standard filter “Today”.
- When initially configuring Adoption Trendz, you might want to start slowly and select only one or two snapshots to run initially until you are certain that the statistics are being recorded accurately and for the correct day.
- While outside the scope of this document, it would be possible to manually load historic data into the adoption trend object. To do this you can leverage the apex data loader or any tool that uses the salesforce API.

Send me your suggestions for enhancing this solution

Twitter: @TexasRob