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.

Configuring Adoption Trendz snapshots

After installing Adoption Trendz from the AppExchange, sign on as an administrator and enter setup mode.
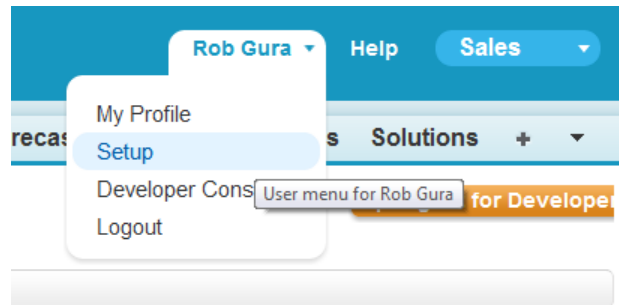
From setup navigate to Administration Setup→ Data Management → Analytic Snapshots. You will need to configure each snapshot for which you want to collect statistics.
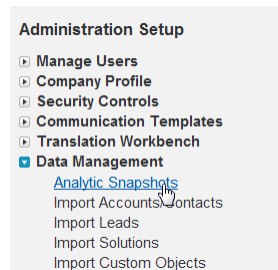
1. Click on AT: Activities, then click edit
2. In the running user field, click the Lookup icon, and search for the salesforce user who will run the source report. Typically, this is an administrative user who has view all data access within your salesforce org.
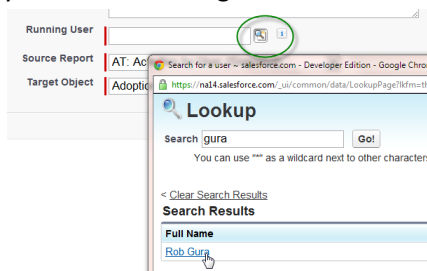
3. Click the save button.

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.

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

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.
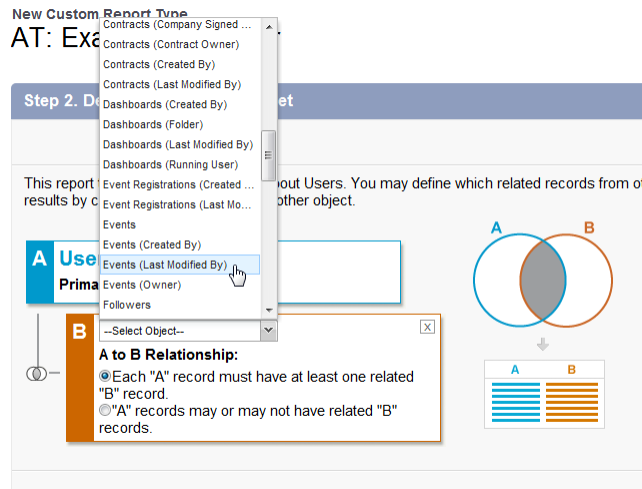
Creating a source Report Type

- 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"

Report Type Focus

Specify what type of records (rows) will be the focus of reports generated by this report type.

Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the prima

Primary Object | Users

Identification

Report Type Label | AT: Examples by User

Report Type Name | AT_Examples_by_User

Note: Description will be visible to users who create reports.

Description | My Description

Store in Category | Administrative Reports

Deployment

A report type with deployed status is available for use in the report wizard. While in development, rep 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
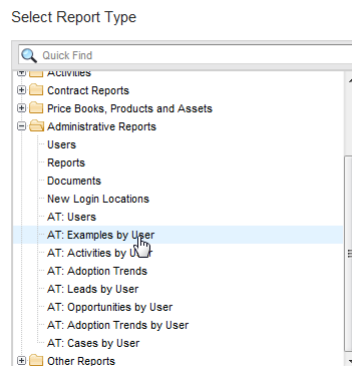
- In the standard report filters, under date field, choose **Last Modified Date** from your <u>custom object</u> (not the users object)
- Choose the date range "Today" for the **Last Modified Date** field
- Add the user ID from the users object to your report and group by this field

- Save your report, naming it "**AT: *{your_object_name}* by User (Snapshot)**"
- Choose the Adoption Trendz folder when saving your report
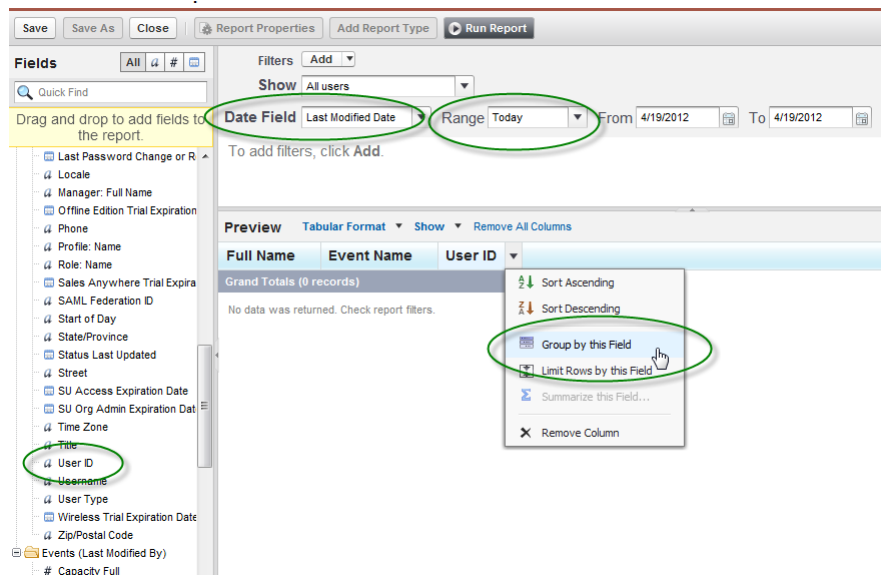
Creating and scheduling your analytic snapshot

- 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

- 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

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.

Important configuration notes

- For each object which you would like to collect statistics and analytic snapshot must be configured <u>and</u> 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 be 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

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