

# Einstein Discovery Innovation Day Hands On Activity

This document is the step-by-step guide to the hands on exercises for Tableau CRM & Einstein Discovery Innovation Day.

- **You should have received an email with your username for your trial org for today's activity. The username will be <your email><random number>.trial**

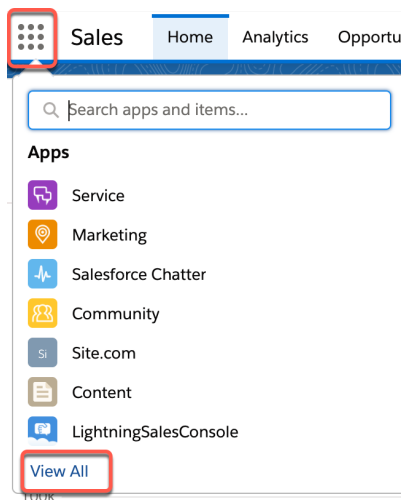
NOTE: If you haven't already registered, please go to <https://pbo-lab-developer-edition.na156.force.com/signup/s/> and fill out the form. You will receive an email with credentials to a trial org.

## Use Case Description:

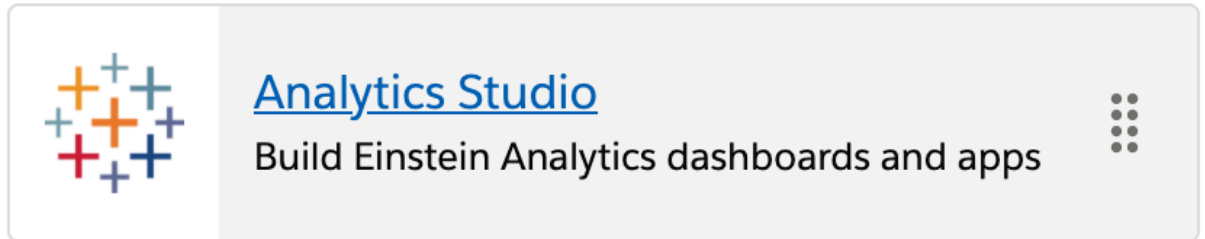
We will build a Discovery story using the dataset **HR-Employee-Attrition**. We will proceed to deploy the model and operationalize it in a business process.

## Exercise 0: Delete the prebuilt Model

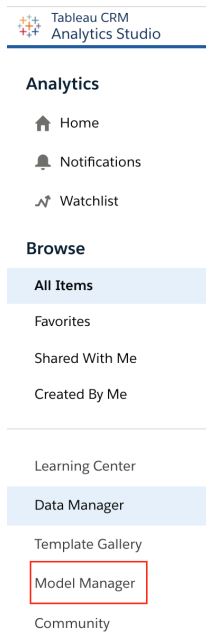
1. From Salesforce, Open App Launcher by clicking on the **App grid**. Then click **View All**.



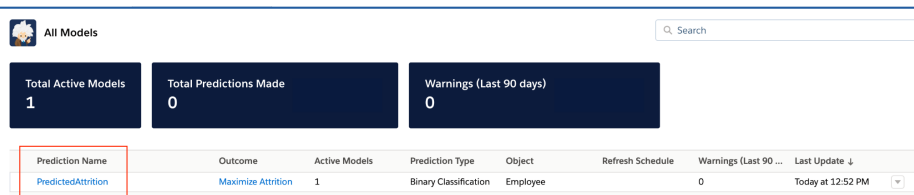
2. Click **Analytics Studio**.



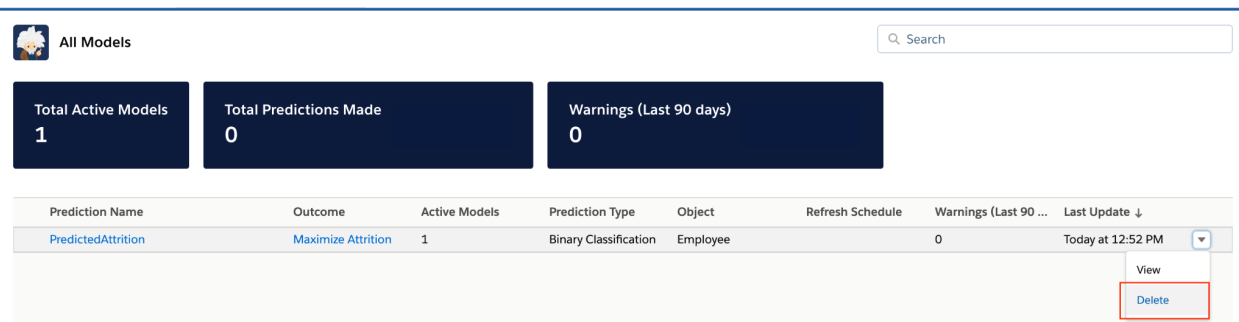
3. Click on **Model Manager**



4. Find the model **"PredictedAttrition"**

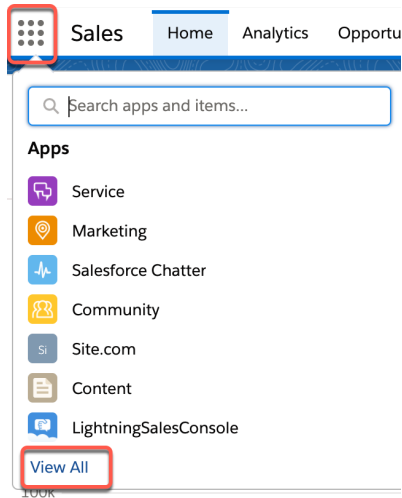


5. **Delete** the model

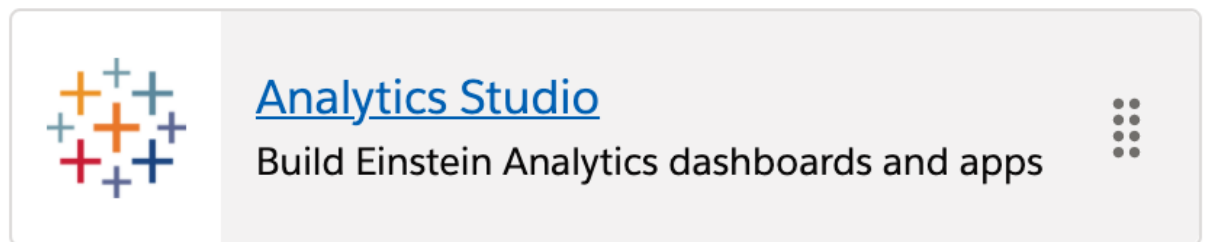


## Exercise 1: Create Discovery Story

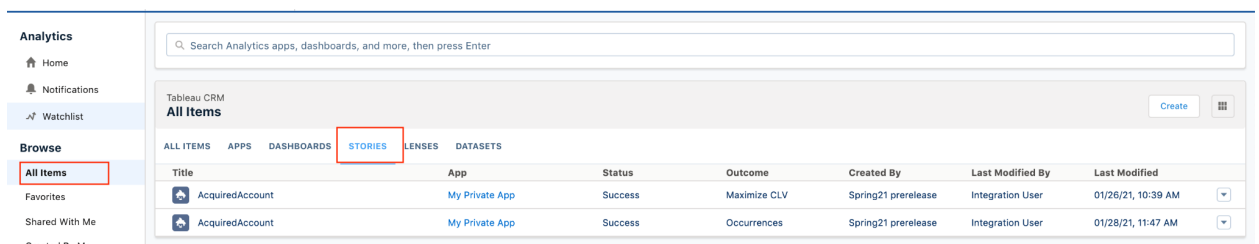
1. From Salesforce, Open App Launcher by clicking on the **App grid**. Then click **View All**.



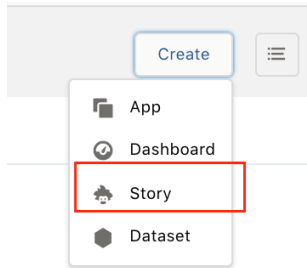
2. Click **Analytics Studio**.



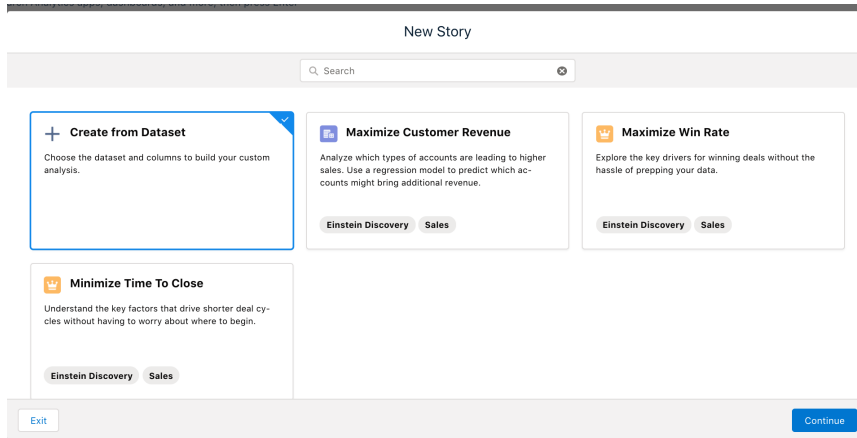
3. On the Analytics home screen, scroll down, click **All Items**. Observe Stories on the menu bar.



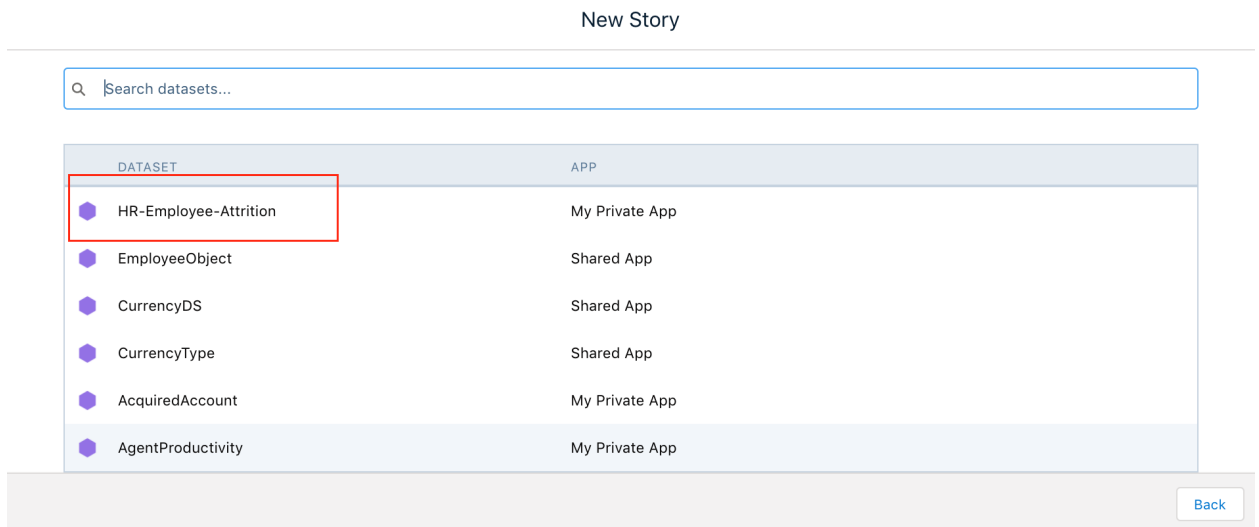
4. Click on Create on the right side and select **Story**.



5. Select **Create from Dataset** and click **Continue**



6. Select **HR-Employee-Attrition** Dataset



7. Select **Attrition (No)** in **Story Goal** and **Maximize** under **Goal**. Type **Story Name** as **MaximizeAttritionNoPractice** and select the App **InnovationDayPractice**.

**Start an Einstein Discovery Story**

**Story Goal**

Field to Analyze ⓘ  
Attrition (No)

Goal  
Maximize

**Choose your story title and location**

Story Name  
MaximizeAttritionNo

App  
InnovationDayFinal

Cancel ● ● ● Story Type

8. Click on **Story Type**
9. Select **Insights and Predictions**

**Create Story**

What type of story are you interested in?

**Insights Only**  
Faster Analysis

Quickly find descriptive insights and evaluate whether your data is ready to create a predictive model.

**Insights & Predictions**  
Complete Analysis

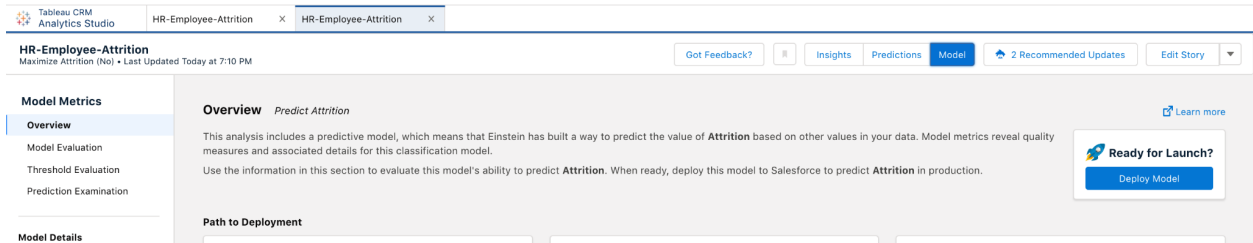
Model creation can take a while so Einstein recommends using this after you have verified that the data is ready for modeling.

Back ● ● ● Setup Options

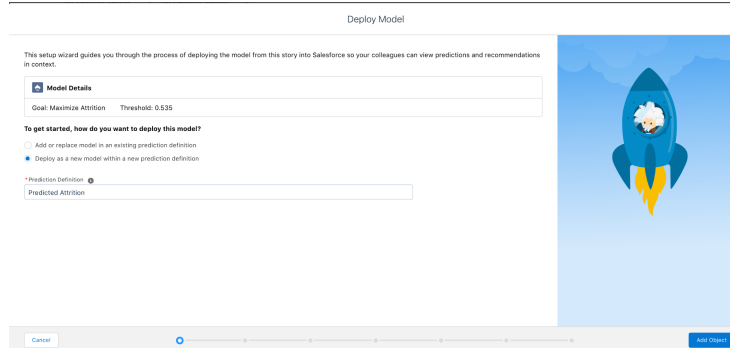
10. Click **Setup Options**.
11. Select **Automated**.
12. Click on **Create Story**.
13. Wait for the process to finish.

## Exercise 2: Deploy a Model

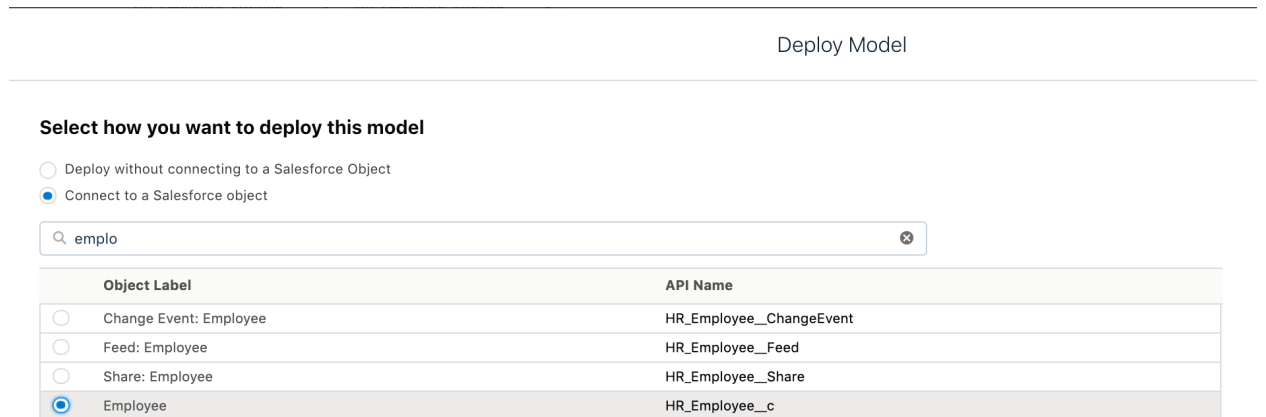
1. Open the **Story**
2. Click on the **Model** button on the menu bar



3. Click on **Deploy Model**.
4. Select **Deploy as a new model within a new prediction definition**.



5. Enter **Predicted Attrition** for Prediction Title.
6. Click on **Add Object**.
7. On the Select how you want to deploy model screen, select **Connect to a Salesforce Object** in the choice box. Then select **Employee** object as the object you want to deploy to.



8. Click the **Map Fields** button.

9. Confirm Field Mapping. They should all be mapped. Age may not be mapped at which time you'll have to add it.

#### Confirm field mapping

> Add Supplemental Dataset

Model Field		Object Field
HourlyRate	✓	HourlyRate
YearsAtCompany	✓	YearsAtCompany
MonthlyIncome	✓	MonthlyIncome
DistanceFromHome	✓	DistanceFromHome
JobSatisfaction	✓	JobSatisfaction
JobInvolvement	✓	JobInvolvement
JobLevel	✓	JobLevel
MonthlyRate	✓	MonthlyRate

10. Click on the **Confirm Prediction Field** button.

11. Select **No prediction field (automatic predictions will not be enabled)**.

Deploy Model

**Name the custom field that stores your results**

Einstein creates a custom field that stores your prediction results. You can name it whatever you like.

☒ No prediction field (automatic predictions will not be enabled)

☐ Create a new prediction field from label

☐ Use an existing prediction field

**Einstein is here to help**

**Assign a custom field for predictions**

To enable automatic prediction, you need to either create a new prediction field (and provide a field label) or use an existing prediction field (select the field label).

Back

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 100

Add Filters

12. Click the **Add Filters** button.

13. Select **No segment (use the prediction on all the data)**.

14. Click the **Add Variables** button.

15. Select **BusinessTravel** on the Select variables to enable improvements window.



**Select variables to enable improvements**

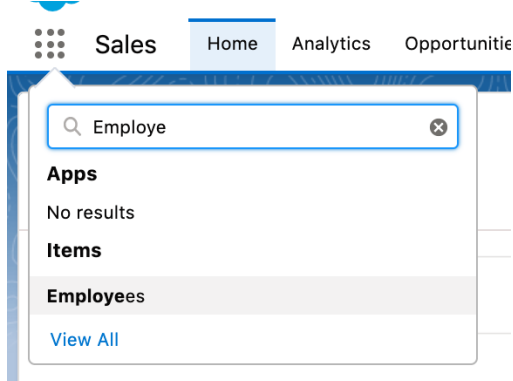
An improvement is a suggested action that a user can take to improve the likelihood of a desired outcome. Select variables that your organization can control, such as deciding which marketing campaign to use for a particular customer. Do not enable improvements for any variables that cannot be controlled, such as customer address information.

<input checked="" type="checkbox"/> Variable	Type
<input type="checkbox"/> JobLevel	number
<input type="checkbox"/> MonthlyRate	number
<input type="checkbox"/> WorkLifeBalance	number
<input type="checkbox"/> NumCompaniesWorked	number
<input type="checkbox"/> RelationshipSatisfaction	text
<input type="checkbox"/> OverTime	text
<input checked="" type="checkbox"/> BusinessTravel	text
<input type="checkbox"/> EnvironmentSatisfaction	text
<input type="checkbox"/> Gender	text
<input type="checkbox"/> EducationField	text

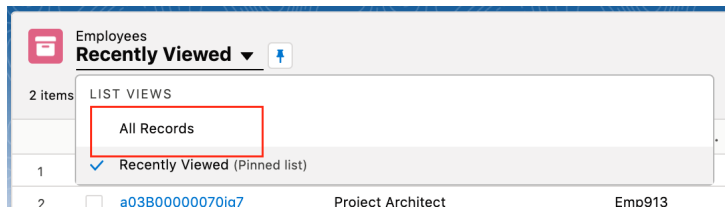
16. Click **Review**.
17. Click **Deploy**.
18. Click **Done** after the model is deployed successfully.

## Exercise 3: Display the Prediction on the Employee Record Page

1. Click on the app launcher icon  and select **Sales** app.
2. You will be taken to the Sales app.
3. Select  again and Search for Employees.



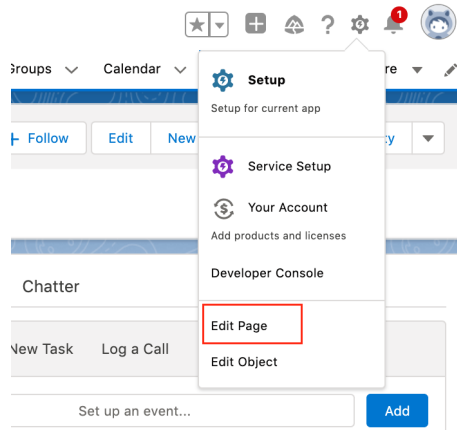
4. Select **All Records** from the list view drop down.



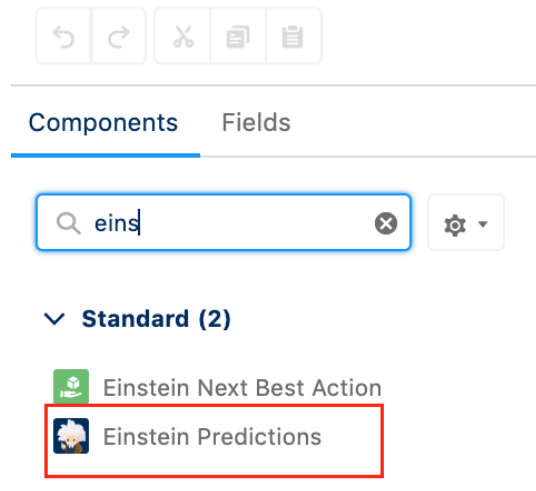
5. Click on any employee record to open the record.



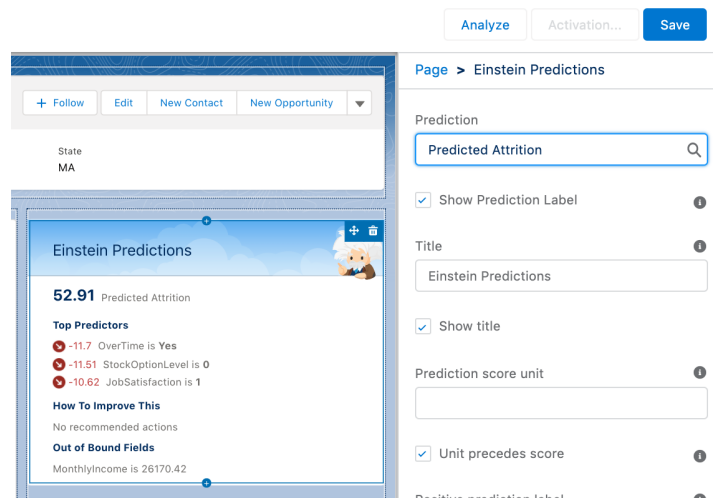
6. Click on the gear icon  and select the **Edit Page** option.



7. In the component selector, search for Einstein Prediction in the Components search box.

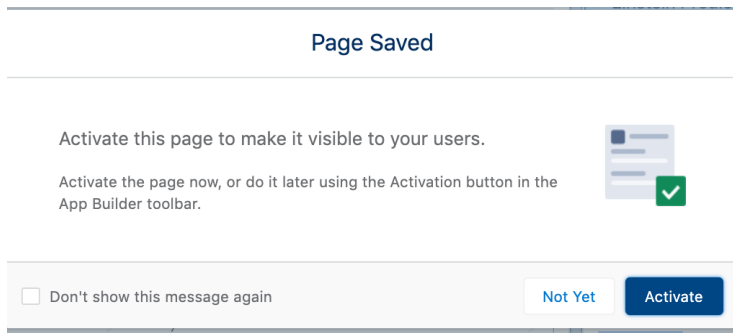


8. Drag the component on the page and drop on the side.
9. Select **Predicted Attrition** under Prediction.

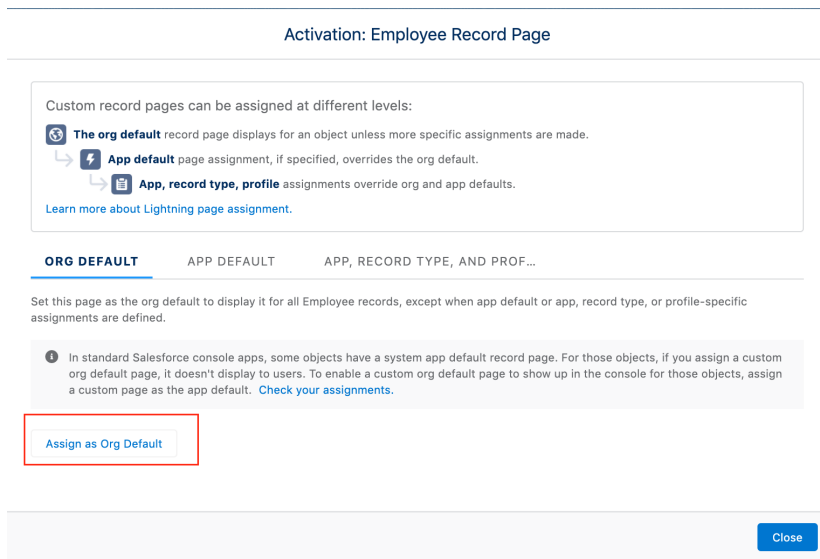


10. Click **Save**.

11. Click **Activate**. If the page has already been activated, you don't need to do this steps 11-16.

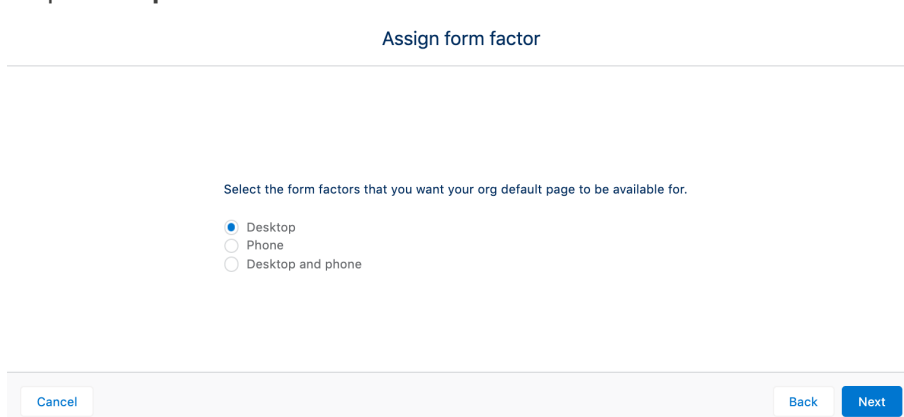


12. Click on **Assign as Org Default**.



13. Click **Save**.

14. Keep **Desktop** as the selected for factor.



15. Click **Next**.

16. Click **Save**.

17. Click the back button from the designer.



Lightning App Builder