MYCHARTS IMPLEMENTATION GUIDE

Introduction

MyCharts is a Visualforce package that works on both desktop browsers and the new Salesforce1 mobile experience. MyCharts provides a simple and dynamic interface for creating charts that can be easily modified and shared with others in your organization. MyCharts is not intended to be a replacement for the existing charts and dashboards in Salesforce. Instead, MyCharts has three properties that complement the existing built-in charts.

- MyCharts is built with Google Charts, so users who are more familiar with Google Charts might prefer it, especially since it includes a couple of chart types that are not part of the built-in Salesforce charts.
- MyCharts is written with the latest HTML5 capabilities, which allows chart creation to be quicker and more flexible.
- MyCharts is built on top of the latest version of the Salesforce Analytics API and can serve as a reference implementation, showing how customers can extend the Salesforce platform with their own customized solutions.

The existing charts within Salesforce have several capabilities that MyCharts lacks, so if you critically depend on any of these features, you'll want to continue to use the built-in charts alone or in combination with MyCharts. For example, the built-in charts can be embedded in other locations and can also be composed into a larger dashboard of charts that can be updated in bulk.

Note: Throughout this document we refer to MyCharts by the single name of "MyCharts." However, this package has occasionally been referred to as "My Insights." As a result, you might occasionally see "My Insights" or "Show Insights" in the interface.

Installation and Administration

MyCharts will eventually be distributed as a Force.com package, but it is available now as an unmanaged package. In either case, most of the installation process is automatic. Before installing the MyCharts package, ensure that your instance of Salesforce satisfies the following two requirements.

- Salesforce version 186 or greater, to support the new Salesforce1 mobile experience.
- API version 29.0.

Once the MyCharts package is installed, there are four manual steps that an administrator can perform in order to fully activate MyCharts within an organization.

Security Profiles

MyCharts makes use of custom objects with custom fields. As a result, any user who can view and create a MyCharts chart needs to be part of a security profile that has read, write, update, and delete privileges for the MyChart__c custom object. We suggest that you further specify that all users have read access to any MyChart__c object, but that only the owner of a MyChart__c object can delete and update a given chart. If you update the standard user profiles to include these privileges, then all new users will be able to use MyCharts. Or, you can create a new profile that includes the required privileges and selectively add users to the new profile, allowing you to more selectively grant access to MyCharts. If you simply want to experiment with or demo MyCharts, you can run MyCharts as an administrator without needing to create or modify security profiles.

Enable MyCharts in Salesforce1 Stage-left

Once MyCharts is installed, a new Visualforce tab named "MyCharts" is automatically added to the organization. If you'd like users of Salesforce1 to have easy access to MyCharts via the stage-left navigation, you'll need to manually add the menu item to the mobile configuration:

1. From Setup, click **Mobile Administration** > **Mobile Navigation**.
2. Add the MyCharts menu item to the list of selected menu items.

Adding the menu item immediately enables it on Salesforce1 for all users.

Enable MyCharts as a Salesforce1 MDP action

Installing the MyCharts package creates a Global Action named "MyCharts" that triggers the chart creation UI. To enable MyCharts as an MDP action:

1. From Setup, click **Customize** > **Chatter** > **Publisher Layouts**.
2. Add the MyCharts Global Action to the list of Publisher Actions.

One side-effect of adding a Publisher Action is that it will also add MyCharts as a new Chatter post type to the desktop experience.

Note: At this time, MyCharts is not designed to be a Chatter post type, but there is no way to disable the new Chatter post type without disabling the corresponding MDP action. As a result, we suggest that when you add MyCharts as a Publisher Action, place it in any position other than the first action. This will prevent MyCharts from being the default Chatter posting experience.

Enable MyCharts Desktop Tab

The MyCharts package contains a Visualforce tab, and you might want to enable the tab to be accessible for all desktop users, since it's the easiest way to access your MyCharts charts. To enable the tab:

1. Click the plus icon (+) next to the main tabs, to view the available tabs.
2. Click **Customize My Tabs**.
3. Add the MyCharts tab to the list of selected tabs.

User Guide

MyCharts has a very simple user interface that is nearly identical in the desktop and mobile versions. You access all of your MyCharts charts by clicking on the MyCharts tab (desktop), clicking on the stage-left icon (mobile), or by directly navigating to /apex/MyCharts on desktop.

The charts shown initially in the MyCharts tab are static thumbnail images. The desktop version of MyCharts has three controls per chart that become visible by hovering over a particular chart. These controls allow you to share, edit, or delete a chart. Clicking on a chart in either mobile or desktop opens up a "live" version of the chart. Live charts are no longer just images and may have some dynamic interaction available by either hovering over or clicking on different portions of the chart. From the live version of a chart, you can also edit, share, or delete the chart.

Create Charts

When you create a chart, the first step is to pick a report that will generate the chart's data. The report picker will show only those reports that are in your personal custom reports folder. For demo purposes, you'll want to make sure that you've created suitable reports in advance. Any chart that you create must be derived from a report that was saved with summary or matrix format. Scatter charts have the additional requirement that they have at least two numerical values as part of the report output.

Note: MyCharts cannot determine at run time if a report fulfills these requirements. As a result, it's possible to pick a report that is unsuitable for making a chart, so we suggest that when giving demos you appropriately prune the reports that are in your personal folder.

To create a new chart:

1. From the MyCharts tab, click **New**.
2. Pick a report from the list.
3. Click on a chart type and **Save**.

Edit Charts

When you edit a chart, you can dynamically switch between the following chart types: horizontal and vertical bar, pie, line, area, stepped area, scatter, or tree map. You can also edit the title of the chart. If you need a chart to be derived from a different report than the one it was created with, you must create a new chart. To edit a chart:

1. From the MyCharts tab, click on the chart you wish to edit.
2. Click on the pencil icon to start editing.
3. Make changes to the chart title, chart type, grouping and summary values and **Save**.

Share Charts

Charts can be shared to Chatter with the share button. When sharing, you can specify a feed and also some text to include in the post. A MyCharts Chatter post will contain a link to the chart. The owner of a chart can edit the chart's properties from this link, and others can view the chart. To share a chart:

1. From the MyCharts tab, click on the chart you wish to share.
2. Click on the sharing icon to start editing.
3. Specify a feed, add a comment, and **Save**.