

Reports & Dashboards

Reports and dashboards provides the answers of the questions which are important for an organization/business.

For example,

- How many leads got converted into accounts?
- Which sales team has generated maximum leads?
- How many employees got bonus more than 20% this year?
- Etc.

The answers to these questions are provided in Salesforce using Reports & Dashboards which automatically gives answers to these questions by using the data (records) present in the different objects in org.

Reports

Report is a list of records that meet a particular criteria which gives answer to a particular question.

These records are displayed as a table that can be filtered or grouped based on any field.

Report Type

Report type determines which set of records will be available in a report.

Every report is based on a particular report type. Report type is selected first when we create a report.

Every report type has a primary object and one or more related objects. All these objects must be linked together either directly or indirectly.

Note: A report type cannot include more than 4 objects.

Note: Once a report is created its report type cannot be changed.

There are 2 kind of report types in Salesforce:

1. Standard Report Types:

Standard Report types are automatically included with standard objects and also with custom objects where “Allow Reports” is checked.

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Standard report types cannot be customized and automatically include standard and custom fields for each object within the report type.

Standard report types get created when an object is created, also when a relationship is created.

Note:Standard report types always have inner joins.

2. Custom Report Types:

Custom report types are reporting templates created to streamline the reporting process.

Custom Reports are created by an administrator or Users with “Manager Custom Report Types” permission.

Custom report types are created when standard report types cannot specify which records will be available on reports.

In custom report types we can specify objects which will be available in a particular report. The primary object must have a relationship with other objects present in a report type either directly or indirectly.

Object relationships that are supported by Custom Report Types can:

1. Include all records that have children.
2. Include all records that may or may not have children.

Note:Once a report type is saved then its primary object can't be changed.

Note:If the primary object on a report type is a custom object, and the custom object is deleted, then the report type and any reports created from it are automatically deleted.

Note:If you remove an object from a report type, all references to that object and its associated objects are automatically removed from reports and dashboards based on that type.

After selecting the report type we switch to report builder to create a report.

Report builder is a visual editor for reports. It lets administrators or users create reports in a very easy way.

It contains 3 main components:

1. Fields Pane:

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It displays the fields that are available from a particular report type.

2. Filters Pane:

It allows to set additional filters which limits the records available in reports. Criteria here includes view, time frame and custom filters.

3. Preview Pane:

It shows how the report will look like.

This pane allows to add, reorder and remove columns, summary fields, formulas, groupings and blocks.

Also it allows to change the report format and display a chart based on report.

Note: Preview pane only shows a limited number of records. Run the report to see all the results.

There are 4 types of report formats in Salesforce:

1. Tabular Reports:

This is the most basic report format. It just displays the row of records in a table with grand total.

While easy to setup they can't be used to create groups of data or charts and also cannot be used in Dashboards.

They are mainly used to generate a simple list or a list with grand total.

2. Summary Reports:

It is the most commonly used type of report. It allows grouping of rows of data, view subtotals and create charts.

3. Matrix Report:

It is the most complex report format. Matrix report summarizes information in grid format. It allows records to be grouped by both columns and rows.

It can also be used to generate dashboards. Charts can be added in this type of report.

4. Joined Reports:

These types of reports lets us create different views of data from multiple report types.

The data in joined reports are organized in blocks. Each block acts as a sub report with its own fields, columns, sorting and filtering.

They are used to group and show data from multiple report types in different views.

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When we save a report only the parameters of the report get saved. The data is always evaluated at real time (when a report is run).

Report can be run manually as well as it can be scheduled to run automatically based on the running user.

The data which is displayed in reports is based on the running user's sharing and security settings. But when we schedule a report we have to select a running user based on whose security and sharing settings the report is generated.

Every report is saved in a particular folder. Users who have access to the report folders can run the report.

Each user, group or role can have its own level of access to a folder. There are 3 types of access levels of folders:

1. Viewer:

With this access level users can see the data in a report but cannot make any changes except cloning it into a new report.

2. Editor:

With this access level users can view and modify the reports it contains and can also move them to/from any other folders they have access level as Editor or Manager.

3. Manager:

With this access level users can do everything Viewers & Editors can do, plus they can also control other user's access level to this folder. Also users with Manager Access level can delete the report.

Note: By default a person who creates a folder is the Manager of that folder.

If a folder does not have Manager Access then it is public and users with "View Reports in Public folders" can view it. Depending of their object access these users can run the report.

Reports present in public folders can be emailed to Salesforce users.

If user is not ready to share his/her report then he/she should save it in "My Personal Custom Reports" folders.

Reports can be exported in .xlsx and .csv format.

Report displays upto 2000 rows of data. Larger reports can be emailed to Excel.

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Note: A user cannot create a report on an object he/she does not have access to.

Dashboards

Dashboards are graphical representation of reports. It shows data from source reports as visual components. These components provide a snapshot of key metrics and performance indicators of the organization at a glimpse.

There are basically 5 types of dashboard components:

1. Charts

Used for showing comparisons.

These are further divided in 6 types

- Line Chart
- Vertical Bar Chart
- Horizontal Bar Chart
- Donut
- Pie
- Funnel

2. Table

Used for showing lists. For example top five or bottom five opportunities.

3. Gauge

Used to show progress towards a goal.

4. Metric

Used to shows a single number like a grand total from a report with a label specified.

5. Visualforce

Used to show visualforce component as a dashboard. It is used to pull data from other data sources

Dashboards display data as per last time report was run.

Each dashboard can have up to 20 components.

Access to dashboards are determined by 2 things:

1. Folders: Visibility of dashboards is also based on the folders in which they are stored.

Only the users have access to folder can run the dashboard.

2. Running User:

The data which will be available on dashboards is based on running user's security and sharing settings.

Running User can be set to:

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a. Run as specified user:

It shows the data on dashboard according to the specified user's security and sharing settings irrespective of the security and sharing settings of user running it. All users who have access to the dashboard can see the same data.

b. Run as Logged-in user: It shows data on dashboard based on the running user's security and sharing settings. It makes the dashboard dynamic.

The dashboard data is based upon the reports data but when a user views the drill-down report for a dashboard component, running user's access permissions determine what data is displayed on the drilldown report. Hence it is possible that the data in the drill down report does not match the associated dashboard data.

Dashboards also support automatic refresh and email. It can be scheduled on daily, weekly and monthly basis.

Dynamic Dashboard

It enables each user to see the data they have access to.

With dynamic dashboards we can control data visibility without creating separate dashboards.

A single dynamic dashboard can display a standard set of metrics across all levels of an organization.

Note: Dynamic dashboards cannot be saved to personal folders.

Note: Dynamic dashboards cannot be scheduled for refreshes.

Dashboards	Dynamic Dashboards
1. It displays data/information based on a single user's perspective.	1. Displays data/information tailored according to the security and sharing settings of running user.
2. Used when we need to show organization wide data to a set of users.	2. Used when we need to show data based on running user's security and sharing settings.

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