



Reports and Dashboards

Veeva Professional Services

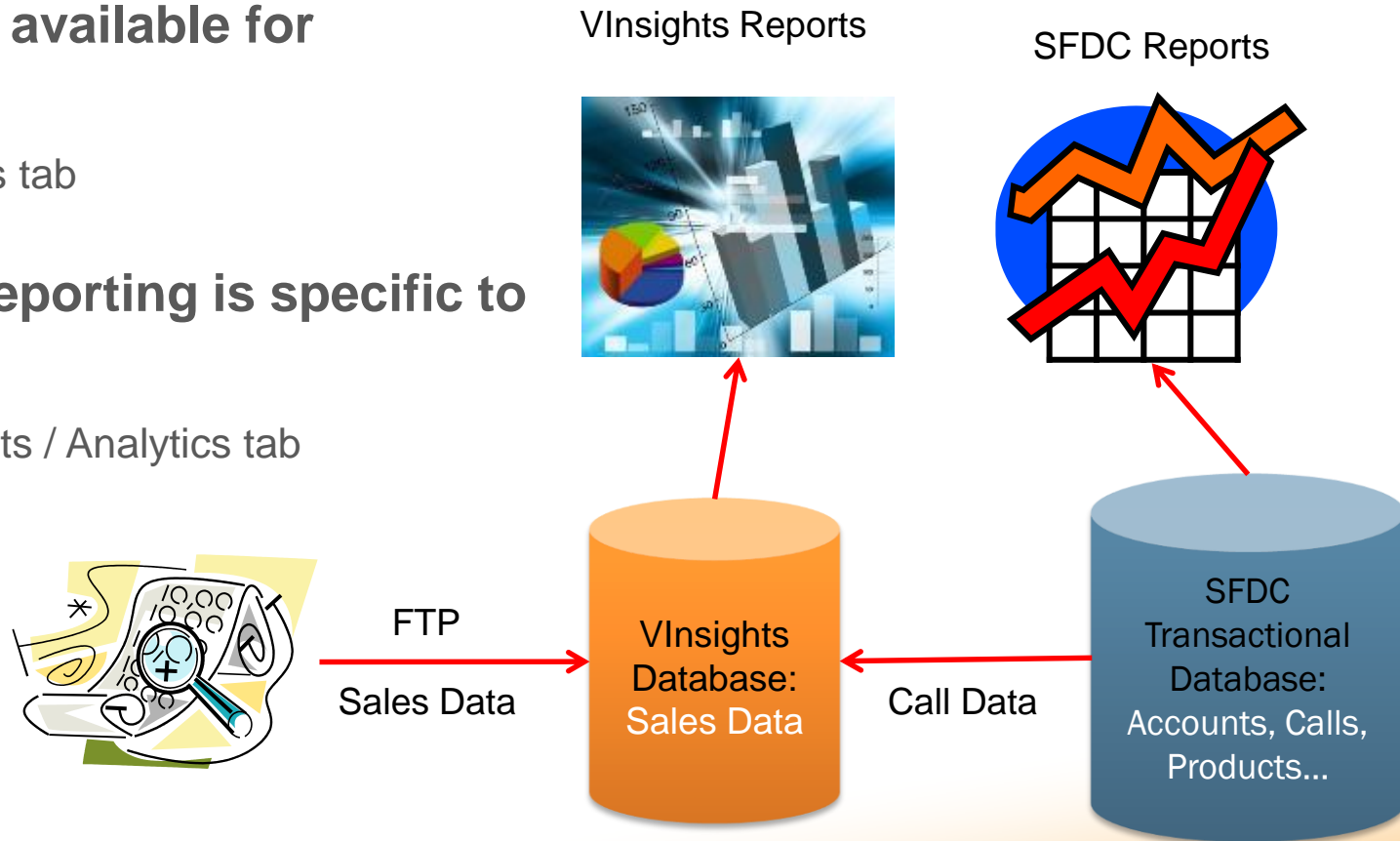
Module Objectives

- **Discuss Salesforce.com vs. VInsights reports**
- **Create Salesforce.com Reports**
- **Define Report Types**
- **Create Salesforce.com Dashboards**



SFDC Reports vs. VInsights

- Veeva uses Salesforce.com reports and Dashboards
- All out-of-the-box and custom objects are available for reporting
 - Reports tab
- VInsights reporting is specific to sales data
 - VInsights / Analytics tab



Reports



Reports

- **Salesforce.com reporting is done against data stored within the Veeva (SFDC) databa**
- **Reports and Dashboards are available online (browser) only**
- **Administrators (and optionally users) have the ability to create Reports**
 - Setup > Manage Users > Profiles > Administrative Permissions: Manage Dashboards, Manage Public Reports
- **Best Practice:**
 - Hide report folders users do not need access to
 - Hover over the report folder and click Edit
 - Select to hide from all users or accessible to certain users
 - Train power users to create reports



Report Outputs: Tabular

■ List of data

Account Owner	Name	Specialty	Address: Street Address	City	State	Zip	License #	License Expiration Date	License Status
Admin Student1	Christopher East	Emergency Medicine	West Street 3633	Garland	TX	75042	22233366	11/21/2014	Valid
Admin Student1	Nestor West	Emergency Medicine	West Street 3634	Garland	TX	75042	22233367	11/22/2014	Valid
Admin Student1	Kelley Brown	Emergency Medicine	West Street 3635	Garland	TX	75042	22233368	11/23/2014	Valid
Admin Student1	Michael Shield	Emergency Medicine	West Street 3636	Garland	TX	75042	22233369	11/24/2014	Valid
Admin Student1	David Johnson	Emergency Medicine	West Street 3637	Garland	TX	75042	22233370	11/25/2014	Valid
Admin Student1	Brett North	Emergency Medicine	West Street 3638	Garland	TX	75042	22233371	11/26/2014	Valid
Admin Student1	John West	Emergency Medicine	West Street 3639	Garland	TX	75042	22233372	11/27/2014	Valid
Admin Student1	Larry Central	Emergency Medicine	West Street 6075	Garland	TX	75042	22233414	1/8/2015	Valid
Admin Student1	James East	Emergency Medicine	West Street 6076	Garland	TX	75042	22233415	1/9/2015	Valid
Admin Student1	David Brown	Emergency Medicine	West Street 6077	Garland	TX	75042	22233416	1/10/2015	Valid
Admin Student1	Sridevi West	Emergency Medicine	West Street 6074	Garland	TX	75042	22233413	1/7/2015	Valid
Admin Student1	Justin Smith	Emergency Medicine	West Street 6078	Garland	TX	75042	22233417	1/11/2015	Valid
Admin Student1	David Central	Emergency Medicine	West Street 6079	Garland	TX	75042	22233418	1/12/2015	Valid
Admin Student1	Douglas North	Emergency Medicine	West Street 6080	Garland	TX	75042	22233419	1/13/2015	Valid
Admin Student1	Minh Lowe	Emergency Medicine	West Street 6081	Garland	TX	75042	22233420	1/14/2015	Valid
Admin Student1	Steve South	Emergency Medicine	West Street 4533	Garland	TX	75042	22233384	12/9/2014	Valid
Admin Student1	Katherine Lowe	Emergency Medicine	West Street 6071	Garland	TX	75042	22233410	1/4/2015	Valid
Admin Student1	Jeffrey East	Emergency Medicine	West Street 6072	Garland	TX	75042	22233411	1/5/2015	Valid
Admin Student1	Gregory Smith	Emergency Medicine	West Street 6073	Garland	TX	75042	22233412	1/6/2015	Valid
Admin Student1	Ladislav Habina	Cardiology	3 Fox Boro Rd	Wayne	NJ	07470	25MA06392902	4/16/2024	Valid
Admin Student1	Ladislav Habina	Cardiology	39 Newton Sparta Rd	Newton	NJ	07860	25MA06392902	4/16/2024	Valid
Admin Student1	Susan Sawyer	Cardiology	102 Landmark W	Newton	NJ	07860	25MA06392918	5/18/2024	Valid
Admin Student1	Sergio Alonso	Cardiology	PASEO DE LA CASTELLANA, 261	MADRID	MADRID	28058	25MA06392919	5/20/2024	Valid
Admin Student1	Sergio Alonso	Cardiology	SAN PEDRO DE ALCANTARA, 3	CACERES	CACERES	10003	25MA06392920	5/22/2024	Valid
Admin Student1	Sergio Alonso	Cardiology	550 First Ave	New York	NY	10011	25MA06392909	4/30/2024	Valid



Report Outputs: Summary

■ Summarized by 1 dimension

	Account Owner	Name	Address: Street Address	City	State	Zip	License #	License Expiration Date	License Status
<input type="checkbox"/>	Specialty: Anesthesiology (1 record)								
	Admin Student1	Henry Allen	97 W Parkway	Pompton Plains	NJ	07444	25MB06457807	4/27/2024	Valid
<input type="checkbox"/>	Specialty: Cardiology (7 records)								
	Admin Student1	Ladislav Habina	3 Fox Boro Rd	Wayne	NJ	07470	25MA06392902	4/16/2024	Valid
	Admin Student1	Ladislav Habina	39 Newton Sparta Rd	Newton	NJ	07860	25MA06392902	4/16/2024	Valid
	Admin Student1	Susan Sawyer	102 Landmark W	Newton	NJ	07860	25MA06392918	5/18/2024	Valid
	Admin Student1	Sergio Alonso	PASEO DE LA CASTELLANA, 261	MADRID	MADRID	28058	25MA06392919	5/20/2024	Valid
	Admin Student1	Sergio Alonso	SAN PEDRO DE ALCANTARA, 3	CACERES	CACERES	10003	25MA06392920	5/22/2024	Valid
	Admin Student1	Sergio Alonso	550 First Ave	New York	NY	10011	25MA06392909	4/30/2024	Valid
	Admin Student1	Alexander Ivanov	550 First Ave	New York	NY	10013	25MB06457809	5/1/2024	Valid
<input type="checkbox"/>	Specialty: Emergency Medicine (19 records)								
	Admin Student1	Christopher East	West Street 3633	Garland	TX	75042	22233366	11/21/2014	Valid
	Admin Student1	Nestor West	West Street 3634	Garland	TX	75042	22233367	11/22/2014	Valid
	Admin Student1	Kelley Brown	West Street 3635	Garland	TX	75042	22233368	11/23/2014	Valid
	Admin Student1	Michael Shield	West Street 3636	Garland	TX	75042	22233369	11/24/2014	Valid
	Admin Student1	David Johnson	West Street 3637	Garland	TX	75042	22233370	11/25/2014	Valid
	Admin Student1	Brett North	West Street 3638	Garland	TX	75042	22233371	11/26/2014	Valid
	Admin Student1	John West	West Street 3639	Garland	TX	75042	22233372	11/27/2014	Valid
	Admin Student1	Larry Central	West Street 6075	Garland	TX	75042	22233414	1/8/2015	Valid



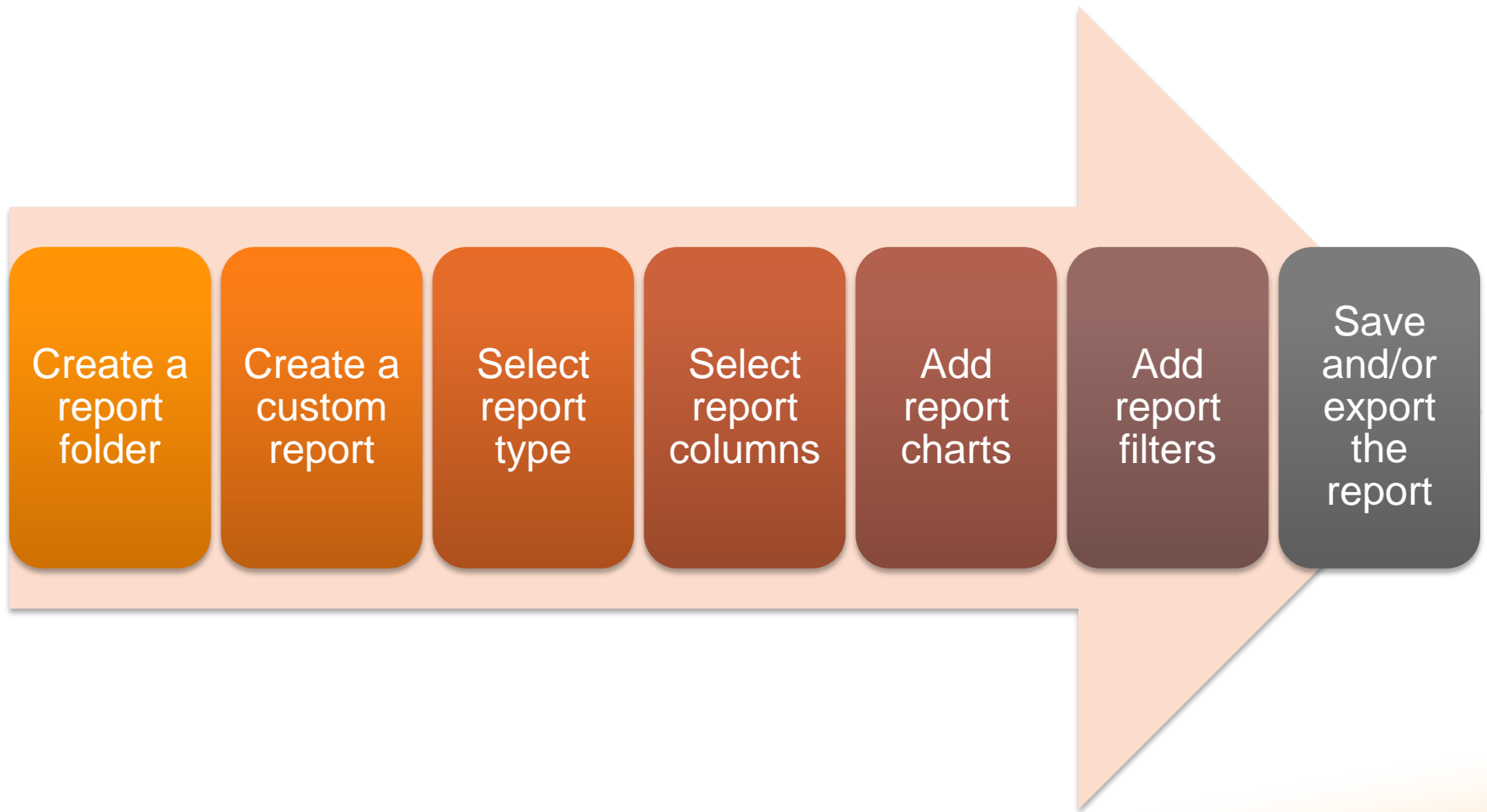
Report Outputs: Matrix

- Summarized by 2 dimensions

			State		Grand Total						
	Specialty		NJ	TX		Account Owner	Name	Address: Street Address	City	Zip	License #
<input type="checkbox"/>	Anesthesiology	Record Count	1	0	1						
			1			Admin Student1	Henry Allen	97 W Parkway	Pompton Plains	07444	25MB06457807
<input type="checkbox"/>	Cardiology	Record Count	3	0	3						
			1			Admin Student1	Ladislav Habina	3 Fox Boro Rd	Wayne	07470	25MA06392902
			1			Admin Student1	Ladislav Habina	39 Newton Sparta Rd	Newton	07860	25MA06392902
			1			Admin Student1	Susan Sawyer	102 Landmark W	Newton	07860	25MA06392918
<input type="checkbox"/>	Emergency Medicine	Record Count	0	19	19						
				1		Admin Student1	Christopher East	West Street 3633	Garland	75042	22233366
				1		Admin Student1	Kelley Brown	West Street 3635	Garland	75042	22233368
				1		Admin Student1	David Johnsnon	West Street 3637	Garland	75042	22233370
				1		Admin Student1	John West	West Street 3639	Garland	75042	22233372
				1		Admin Student1	James East	West Street 6076	Garland	75042	22233415
				1		Admin Student1	Sridevi West	West Street 6074	Garland	75042	22233413
				1		Admin Student1	David Central	West Street 6079	Garland	75042	22233418
				1		Admin Student1	Minh Lowe	West Street 6081	Garland	75042	22233420
				1		Admin Student1	Katherine Lowe	West Street 6071	Garland	75042	22233410
				1		Admin Student1	Gregory Smith	West Street 6073	Garland	75042	22233412
				1		Admin Student1	Jeffrey East	West Street 6072	Garland	75042	22233411
				1		Admin Student1	Steve South	West Street 4533	Garland	75042	22233384
				1		Admin Student1	Douglas North	West Street 6080	Garland	75042	22233419
				1		Admin Student1	Justin Smith	West Street 6078	Garland	75042	22233417

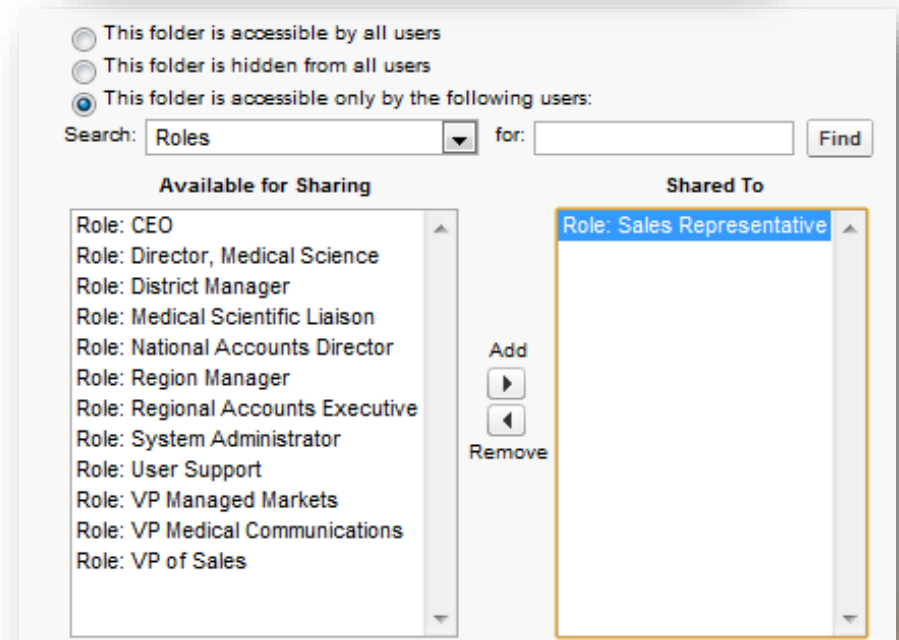
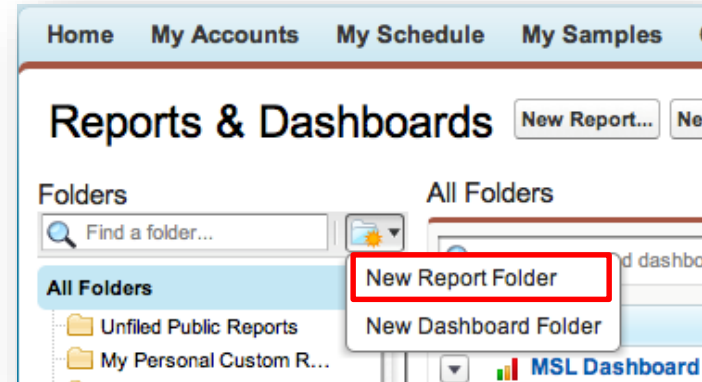


Create a Report



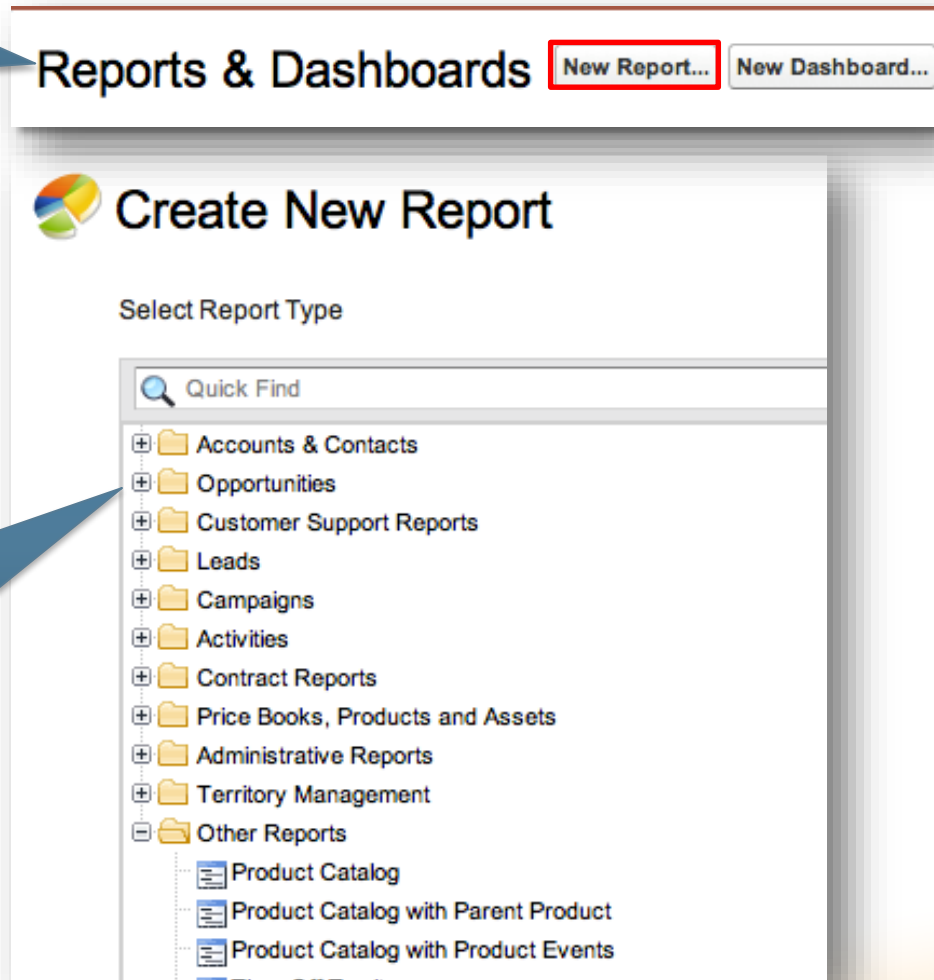
Create a Report Folder

- To create a new custom report folder:
 - Reports tab and click the New Report Folder menu item
- Name the folder
- Specify folder security to make reports available to users based on the folders they can access
 - Available for all users
 - Hidden from all users
 - Accessible only by certain users



Create a Custom Report

To create a new custom report, click the **New Report** button



Select the Category and Report Type; Administrators can define custom report types



Create a Custom Report

The screenshot shows the Veeva Custom Report Builder interface. On the left is the **Fields Pane** with a list of fields and a 'Quick Find' search bar. A yellow box highlights the instruction: 'Drag and drop to add fields to the report.' In the center is the **Filters** section with an 'Add' button, a 'Show' dropdown set to 'My accounts', and a date range filter for 'Created Date' from '7/1/2011' to '9/30/2011'. On the right is the **Preview Pane** showing a table of data. A blue callout points to the table with the text: 'Use Report Filters to limit number of records displayed in the report'. Another blue callout points to the fields list with the text: 'Drag and drop needed fields'. The interface also includes buttons for 'Save', 'Save As', 'Close', 'Report Properties', and 'Run Report'.

Fields Pane

Drag and drop to add fields to the report.

Filters

Show: My accounts

Date Field: Created Date Range: Current FQ From: 7/1/2011 To: 9/30/2011

To add filters, click Add.

Preview Pane

Drop a field here to create a grouping. Hide

Name	Call Name	Call Sample Name
Enrico Orlandoni	C000004297	CS000000762
Enrico Orlandoni	C000004315	CS000000763
Enrico Orlandoni	C000004341	CS000000764
Enrico Orlandoni	C000004341	CS000000765
Clinton Ackerman	C000004344	CS000000766
JORGE ALMOGUERA	C000004345	CS000000767
Melany Segnit	C000004383	CS000000769
Clinton Ackerman	C000004384	CS000000770
Melany Segnit	C000004402	CS000000771
Melany Segnit	C000004409	CS000000772
Grand Totals (10 records)		

This preview shows a limited number of records. Run the report to see all results.

Select Field(s) to Group By

Select the report format: Tabular, Summary, Matrix

Drag and drop desired fields from the Fields pane into the Preview pane

Example: To group by Name, drag the Name field to the grouping area

Preview	Summary Format	Show	Add Chart	Remove All Columns
Name	Attendees	Date	Product: Product Name	Quantity
Drop a field here to create a grouping.				Hide
Enrico Orlandoni	0	10/28/2009	Cholecap 10mg	2
Enrico Orlandoni	0	3/19/2010	Cholecap 10mg	1
Enrico Orlandoni	0	7/8/2010	Cholecap 10mg	10
Enrico Orlandoni	0	7/8/2010	Restolar 1 mg	2
Clinton Ackerman	1	10/15/2010	Restolar 1 mg	1
JORGE ALMOGUERA	1	10/15/2010	Cholecap 10mg	1
Melany Segnit	0	5/20/2011	Cholecap 10mg	3
Clinton Ackerman	0	6/23/2011	Cholecap 10mg	10
Melany Segnit	0	7/28/2011	Cholecap 10mg	30
Melany Segnit	0	8/4/2011	Cert Product 20mg	20
Grand Totals (10 records)				
This preview shows a limited number of records. Run the report to see all results.				

Summarize Field(s)

1. Notice the report is being grouped by Account Name

Preview Summary Format Show Add Chart Remove All Columns

Attendees	Date	Product: Product Name	Quantity
Name: Clinton Ackerman (2 Records)			
Drop a field here to create a grouping. Hide			
1	10/15/2010	Restolar 1 mg	
0	6/23/2011	Cholecap 10mg	
Name: Enrico Orlandoni (4 Records)			
0	10/28/2009	Cholecap 10mg	15
0	3/19/2010	Cholecap 10mg	2
0	7/8/2010	Cholecap 10mg	1
0	7/8/2010	Cholecap 10mg	10
0	7/8/2010	Restolar 1 mg	2

2. Click on the Quantity dropdown arrow and select Summarize this Field

- Sort Ascending
- Sort Descending
- Group by this Field
- Summarize this Field**
- Remove Column

3. Select Sum in the Summarize window

Summarize

Field	<input checked="" type="checkbox"/> Sum	<input type="checkbox"/> Average	<input type="checkbox"/> Max	<input type="checkbox"/> Min
Quantity	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Apply Cancel

Add Report Charts

- To add a chart to the report:
 - Click the Add Chart button and enter chart properties

Select a chart type

Specify Y and X axis columns

Plot additional values to display combination charts

The Chart Editor dialog box is shown with the following configuration:

- Select Type:** Bar chart icon is selected.
- Chart Data** tab is active.
- Y-Axis:** Sum of Quantity
- X-Axis:** Name
- Group By:** -- Select --
- Combination Charts:**
 - ☒ Plot additional values
 - Display:** Line
 - Value:** Record Count
 - ☒ Use second axis

A preview of the chart is shown on the right, displaying a combination of bars (Sum of Quantity) and a line (Record Count) for various names. The preview includes a warning: "This preview may not include all data."

Name	Sum of Quantity	Record Count
Clinton Ack...	10	2.5
Enrico Orta...	15	3.5
JORGE ALMO...	5	1.5
Melany Segn...	55	3.0

Preview chart as you build it

Add Report Filters

- Add report filters

Show All
Accounts or My
Accounts

Filters Add

Show All accounts

Date Field Created Date Range Current FQ From 7/1/2011 To 9/30/2011

Target? equals True OK Cancel

Enter time
period filter

Select fields to
filter by

- Save the report

Specify Name
and Folder to
save the report in

Save Report Help for this Page

Report Name Accounts with Samples for Training

Report Unique Name Accounts_with_Samples_for_Training

Report Description Created for training.

Report Folder Training Reports

Save Save and Run Report Cancel

Report Types



Custom Report Types

- **Custom or standard objects often exist in the org that do not have a report type to support reports to be created for them**
 - Ex: A relationship between the User and Synch Transaction objects exists out-of-the-box, but a report type allowing data from these objects to be displayed side-by-side in a report does not exist
- **Custom Report Types need to be created in some cases**
 - Relationship between objects must first be defined either with a lookup or a master-detail field
 - When defining the report, you can select to use inner or left outer joins
 - Display parent record only if a related child record exists (inner)
 - Display parent record even if a related child record does not exist (left outer)
 - Can configure report page layouts and hide fields that should not be selected in reports



Custom Report Types

- To create custom report types:
 - Setup → Create → Report Types

Report Type Focus ! = Required Information

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 primary object.

Primary Object

Identification

Report Type Label

Report Type Name [i](#)

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

Description

Store in Category

Deployment

A report type with deployed status is available for use in the report wizard. While in development, report types are visible only to authorized administrators and their delegates.

Deployment Status ☐ In Development ☒ Deployed

Select a report category for the report type

Select report type's primary object

Custom Report Types

- Define report type records set

Select detail objects to display data from

Selecting this option creates an outer-join. Only accounts with at least one training instance record will be displayed.

This report type will generate reports about Accounts. You may define which related records from other objects

A Accounts
Primary Object

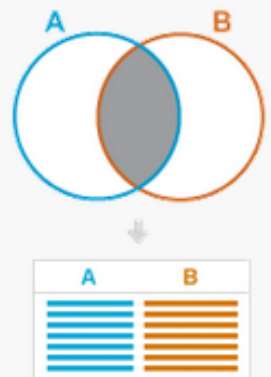
B Training Instances

A to B Relationship:

☒ Each "A" record must have at least one related "B" record.

☐ "A" records may or may not have related "B" records.

(Click to relate another object)



Custom Report Types

- New report type displays when creating new custom reports

The screenshot shows a two-step process for selecting a report type. On the left, a panel titled 'Select Report Type' contains a 'Select Category' dropdown menu. The categories listed are: Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns, Activities, Contract Reports, Price Books, Products and Assets, Administrative Reports, Territory Management, and Other Reports. An arrow points from this panel to a second panel on the right. The second panel, also titled 'Select Report Type', contains a list of specific report types: Google Campaigns with Opportunity, Keywords, Keywords with Lead, Keywords with Opportunity, Search Phrases, Search Phrases with Lead, Search Phrases with Opportunity, Text Ads, Text Ads with Lead, Text Ads with Opportunity, Accounts with Trainings, and Accounts with Calls and Samples. The 'Accounts with Trainings' option is highlighted with a blue background and a red border.

Select Report Type

Select Category

- Accounts & Contacts
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities
- Contract Reports
- Price Books, Products and Assets
- Administrative Reports
- Territory Management
- Other Reports

Select Report Type

- Google Campaigns with Opportunity
- Keywords
- Keywords with Lead
- Keywords with Opportunity
- Search Phrases
- Search Phrases with Lead
- Search Phrases with Opportunity
- Text Ads
- Text Ads with Lead
- Text Ads with Opportunity
- Accounts with Trainings**
- Accounts with Calls and Samples

Custom Fields and Report Types

- Custom fields are not automatically added to report type(s) page layouts
- After a custom field is added to an object it must be added to the appropriate existing report type(s) page layout(s)
 - Go to **Setup** → **Create** → **Report Types** and click the link to go into the appropriate report type
 - Click the **Edit Layout** button and then place the custom field(s) on the page layout

Billing Street	Billing Zip/P...	Business Desc...	Call Class		Accounts Fields [Page 1/10]	
Call Frequency	Account Ident...	Accept Medica...	Commercial Pa...		Next Page ▶	
Commercial Pr...	Contracts Pro...	Created By	Created Date		# Beds	# Departments
Credentials	Description	Employees	Exclude from ...		Accept Medica...	Accept Medica...
					Account Class	Account Group
					Account ID	Account Ident...



Dashboards



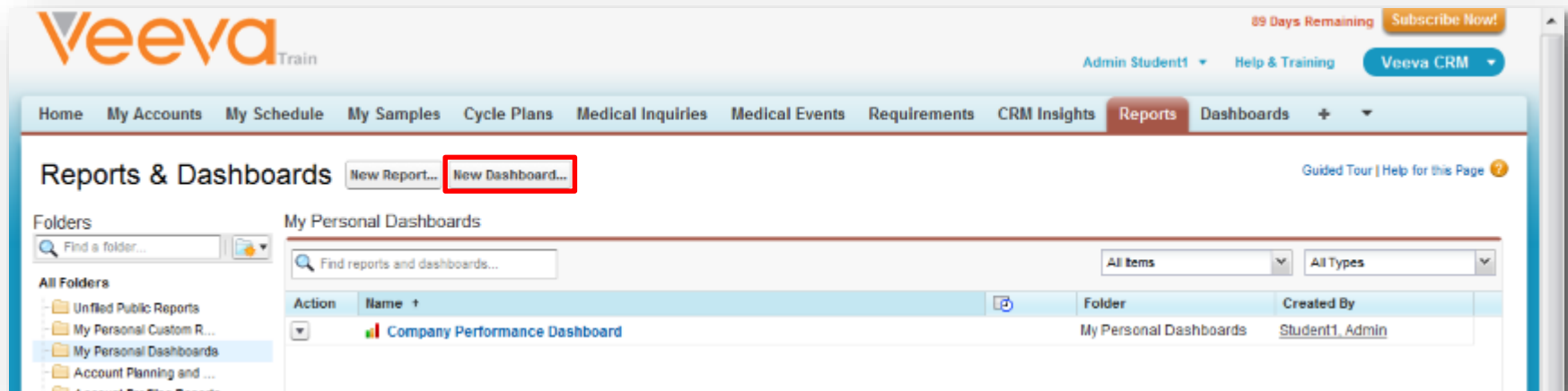
Dashboards

- Dashboard displays all reports you have built in the same place
- Provides a graphical summary of the data in the application
- Data can be represented by charts, tables, metrics, gauges, and Visualforce pages
- Up to 20 components can be added to a dashboard



Dashboards

- To create a new dashboard:
 - Reports tab
 - Click the New Dashboard button



- Similar to reports, dashboards are organized into folders
 - Create a dashboard folder if needed

Dashboards

- Click the Dashboards Properties button

- Specify Title
- Specify Save to folder

Dashboard Properties [Help for this Page](#) ? x

General Component Settings

Title Training Dashboard

Dashboard Unique Name Training_Dashboard i

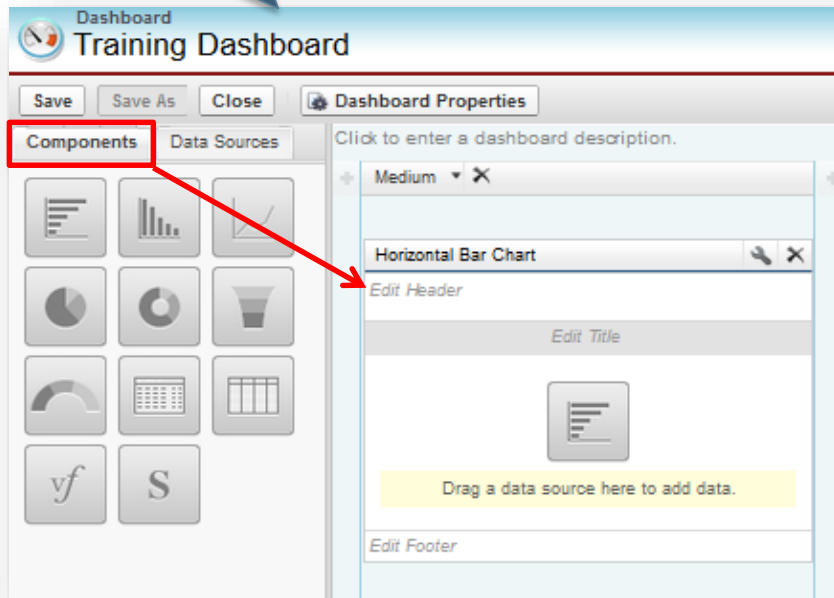
Folder
To avoid exposing sensitive data to the wrong people, choose a folder visible only to the right users.

Save to Training Dashboards ▼

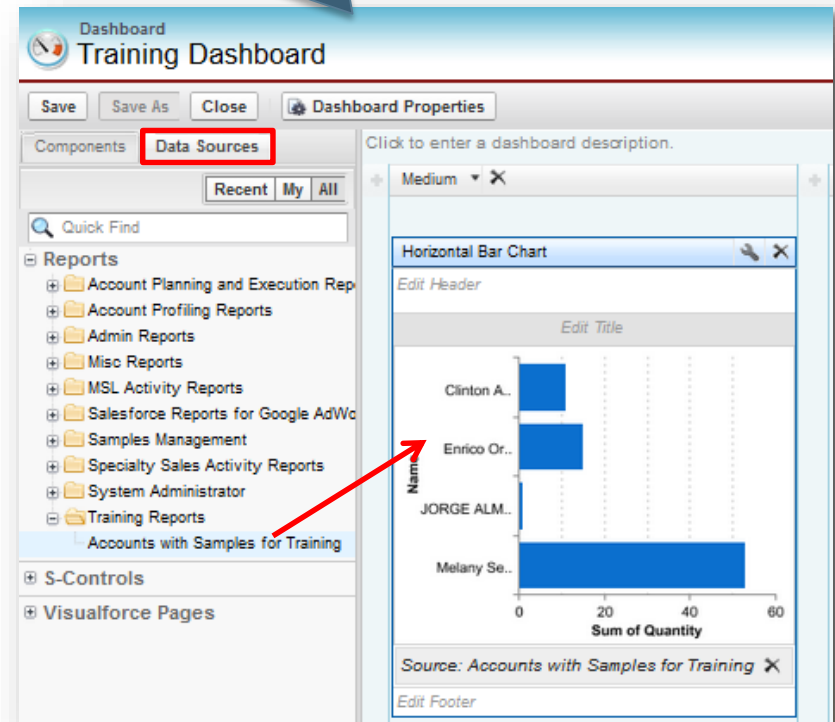
OK Cancel

Dashboards


From the Components tab, drag and drop the desired chart type over the a column

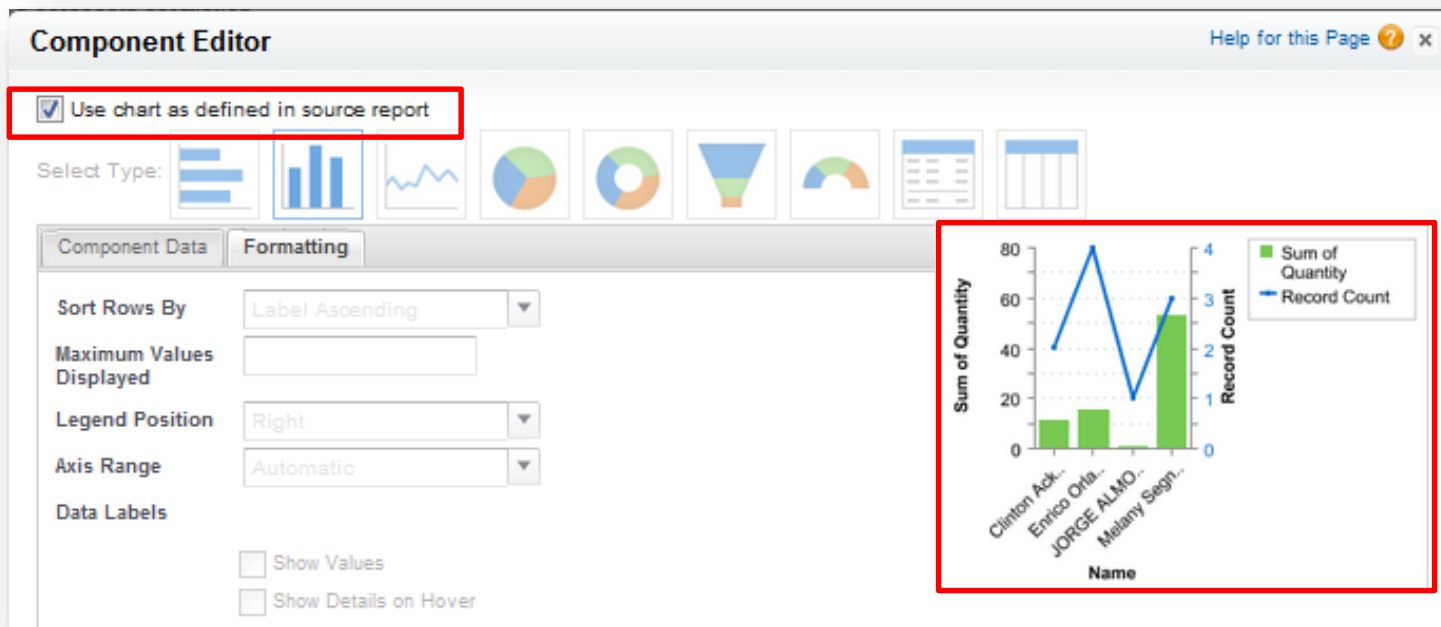


From the Data Sources tab, expand a report folder, then drag and drop the source report on top of a chart



Dashboards

- To configure chart properties, click the wrench 
 - Select Use chart as defined in source report
- You can also build a different chart from the data set in the selected data source (report)



The screenshot shows the 'Component Editor' window. At the top, there is a 'Help for this Page' link. Below it, a red box highlights the checkbox 'Use chart as defined in source report', which is checked. Underneath, there is a 'Select Type:' section with various chart icons. The 'Formatting' tab is selected, showing options for 'Sort Rows By' (Label Ascending), 'Maximum Values Displayed', 'Legend Position' (Right), 'Axis Range' (Automatic), and 'Data Labels' (Show Values, Show Details on Hover). A red box highlights a preview chart on the right. The chart is a combination bar and line chart showing 'Sum of Quantity' (green bars) and 'Record Count' (blue line) for four categories: Clinton Adm., Enrico Oria, JORGE ALMO, and Melany Segn. The x-axis is labeled 'Name'.

Name	Sum of Quantity	Record Count
Clinton Adm.	10	2
Enrico Oria	15	4
JORGE ALMO	5	1
Melany Segn.	55	3

Dashboards

View dashboard as a specified user: All users see the same result set

View dashboard as a logged-in user: Show data according to each user's data access level

Specify if certain users can change the running user

View dashboard as:

Dashboard Running User
Show all users the same data in the dashboard by choosing a specific running user, or show data according to each viewer's access level by choosing to run as the logged-in user. [Learn more...](#)

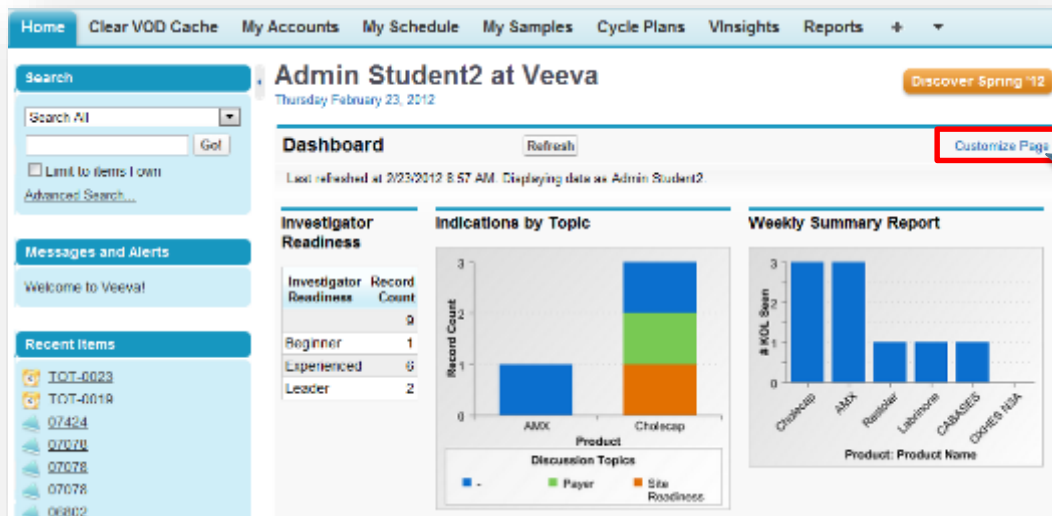
☐ Run as specified user

☒ Run as logged-in user [i](#)

☒ Let authorized users change running user [i](#)

OK Cancel

Customize Home Tab



From the Home tab, click Customize Page in the Dashboard section

Customize your Home Page

Customizable Components:

Your home page includes the following dashboard snapshot. Select the dashboard to use as the source of y

Component:
Dashboard Snapshot

Show Data From:

Training Dashboard

- My Personal Dashboards
 - Company Performance Dashboard
- Google AdWords Dashboards
 - Google AdWords Dashboard
- public
 - Managed Markets Director Dashboard
 - Managed Markets Sales Dashboard
 - MSL Dashboard
 - MSL Director Dashboard
 - Specialty Rep Dashboard
 - Specialty Sales Management Dashboard
- Training Dashboards
 - Training Dashboard

Select the dashboard to show data from

Reporting Tips

- **Don't start building a report from scratch – choose an existing one and customize it instead**
- **Save the reports as frequently as possible (browser navigation)**
- **There are (too many) report types available by default – an Admin can hide most of them**
- **Using the Schema Builder (Setup → Schemer Builder) can help understanding the data model (and its limitations)**
- **Looking for a field that you can't find in the report? Check first what its correct label is from a CRM page layout**
- **Custom fields may still not be on the report type page layout**
- **When building dashboards, it is easier to build the charts within the reports and use the charts as defined in the source report**



Module Summary

- Discussed Salesforce.com vs. VInsights reports
- Created Salesforce.com Reports
- Defined Report Types
- Created Salesforce.com Dashboards



Labs

Create a Summary Report with Chart

Create a Dashboard

