Reports and Dashboards

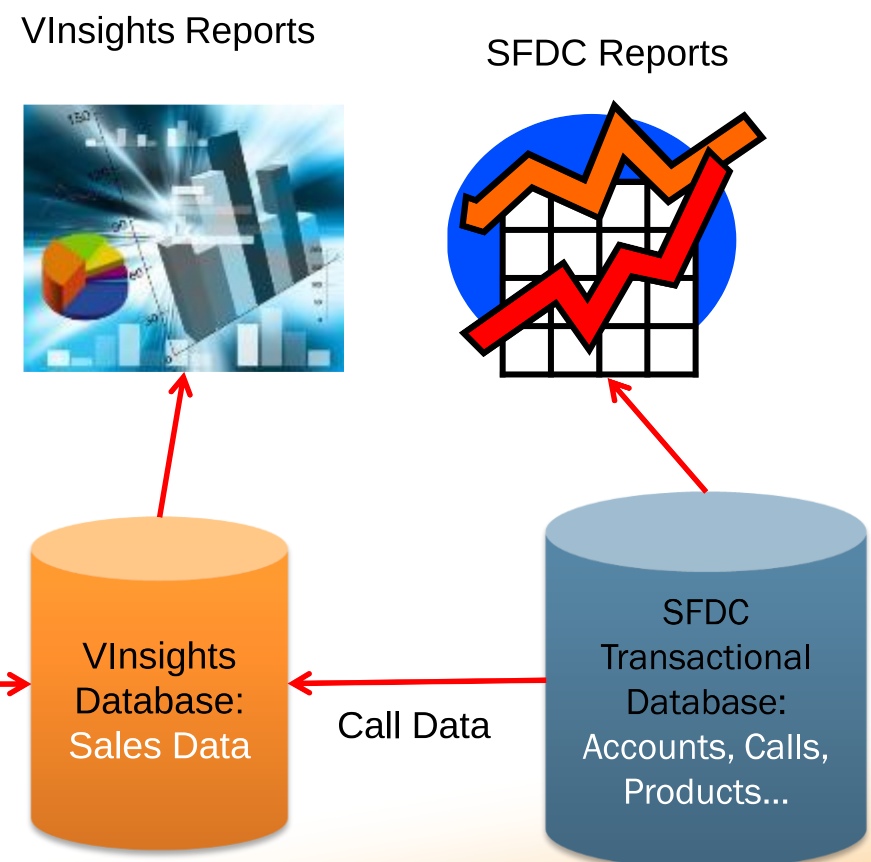
Veeva Professional Services

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 Saleforce.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 Johsnon	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**

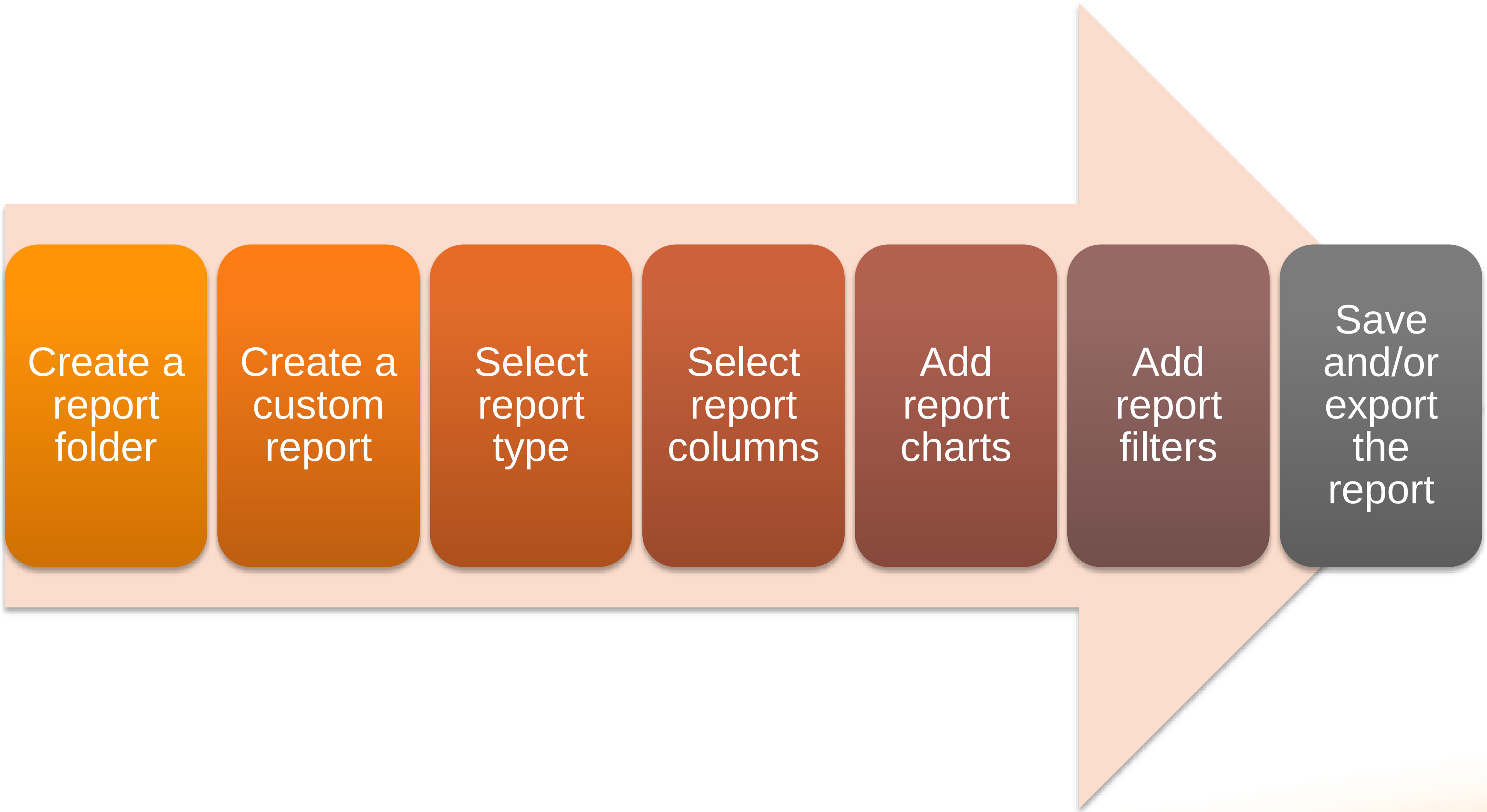
	Account Owner	Name	Address: Street Address	City	State	Zip	License #	License Expiration Date	License Status
☐	**Specialty:** Anesthesiology **(1 record)**								
	Admin Student1	Henry Allen	97 W Parkway	Pompton Plains	NJ	07444	25MB06457807	4/27/2024	Valid
☐	**Specialty:** Cardiology **(7 records)**								
	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
☐	**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 Johsnon	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**

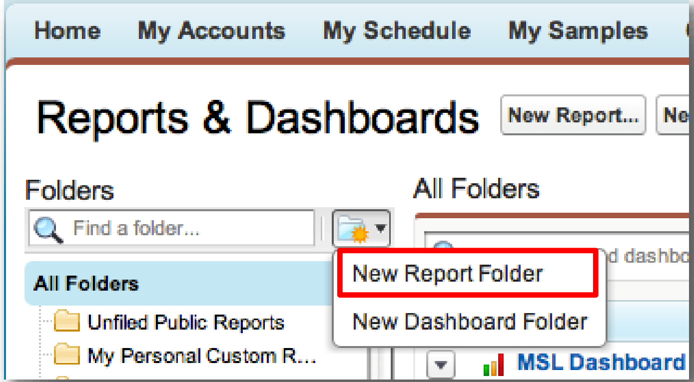
		State		Grand Total						
Specialty		NJ	TX		Account Owner	Name	Address: Street Address	City	Zip	License #
Anesthesiology	Record Count	1	0	1						
		1			Admin Student1	Henry Allen	97 W Parkway	Pompton Plains	07444	25MB06457807
Cardiology	Record Count	3	0	3						
		1			Admin Student1	Ladislav Habina	3 Fox 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
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 Johsnon	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



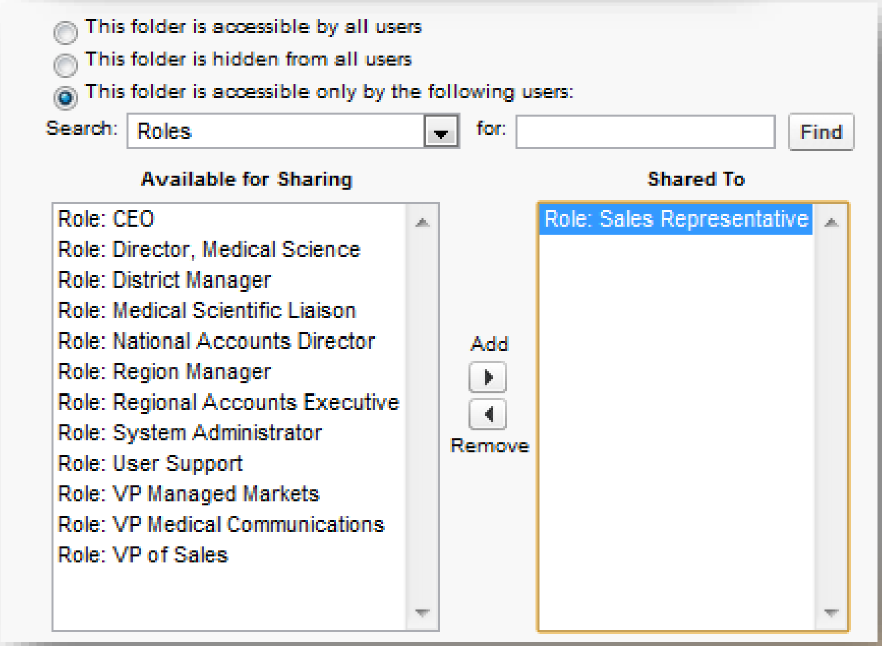
Create a Report Folder

- **To create a new custom report folder:**
  - Reports tab and click the New Report Folder menu item



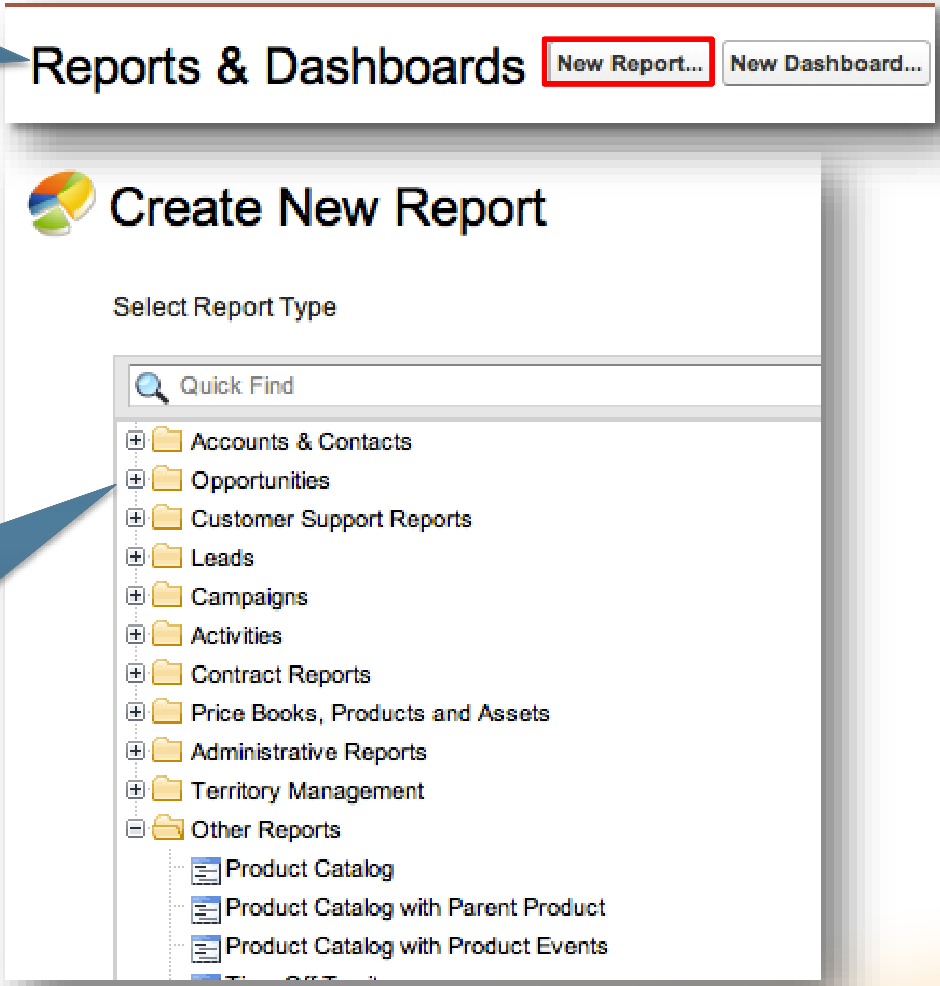
- **Name the folder**

- **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



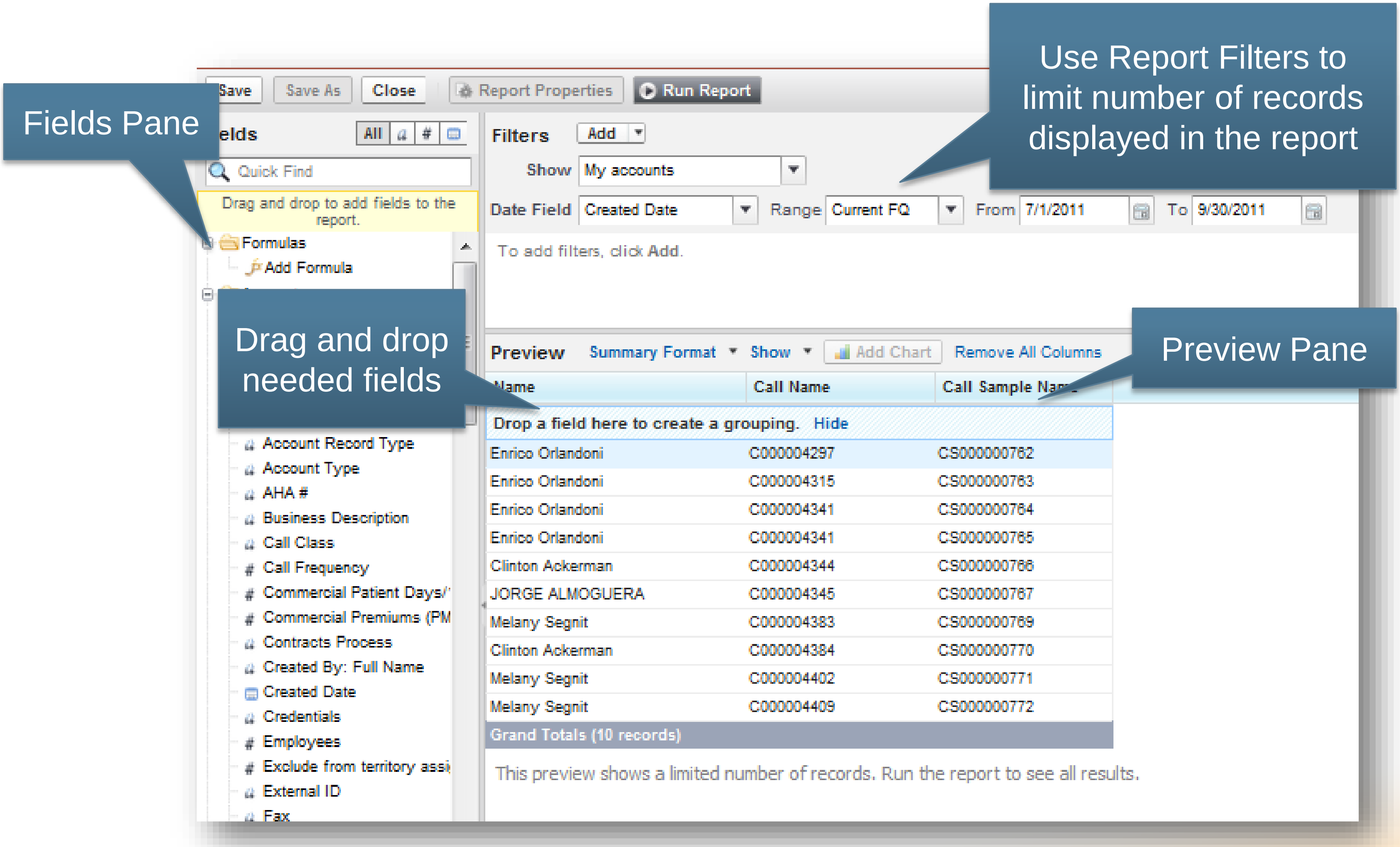
Create a Custom Report

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

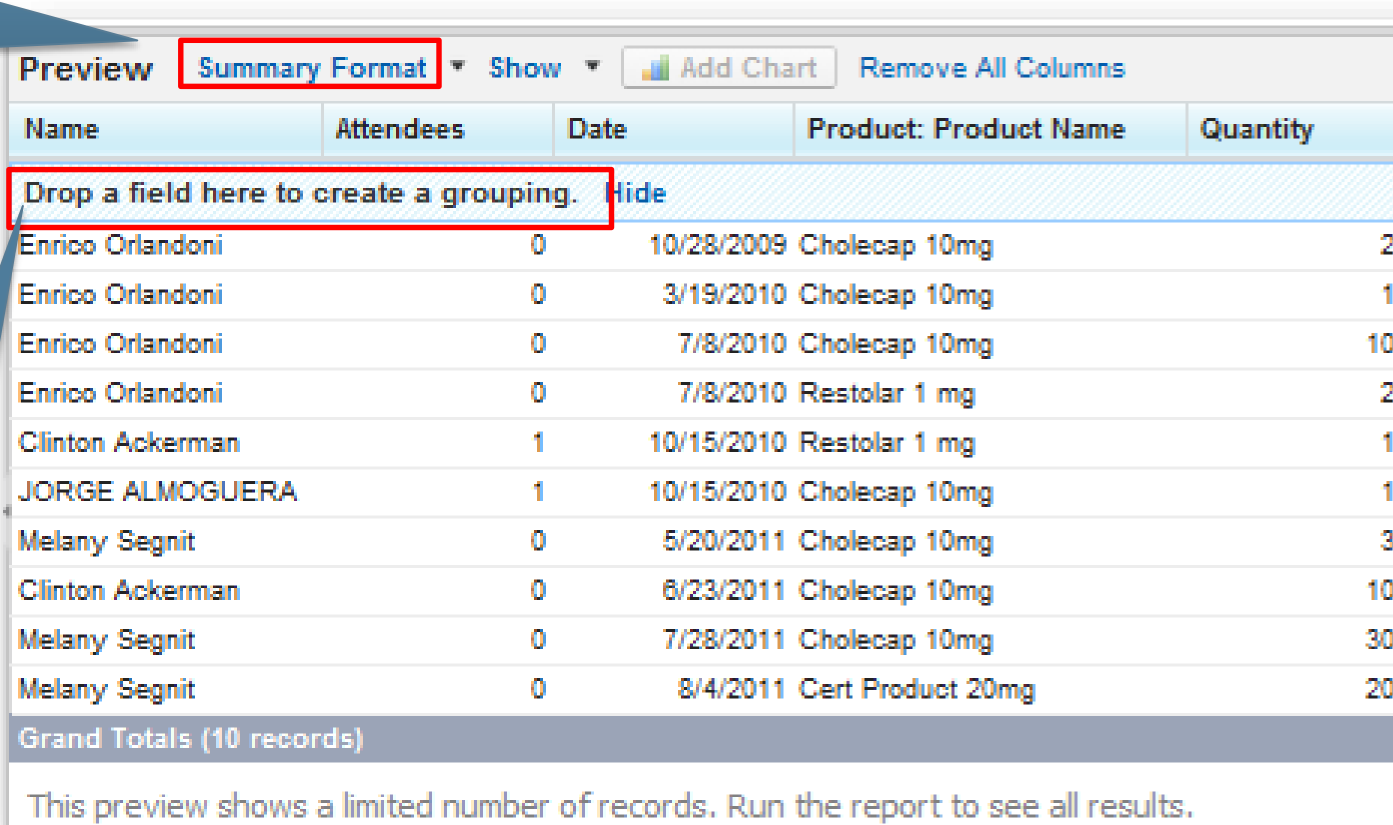


Select Field(s) to Group By

Select the report format: Tabular, Summary, Matrix

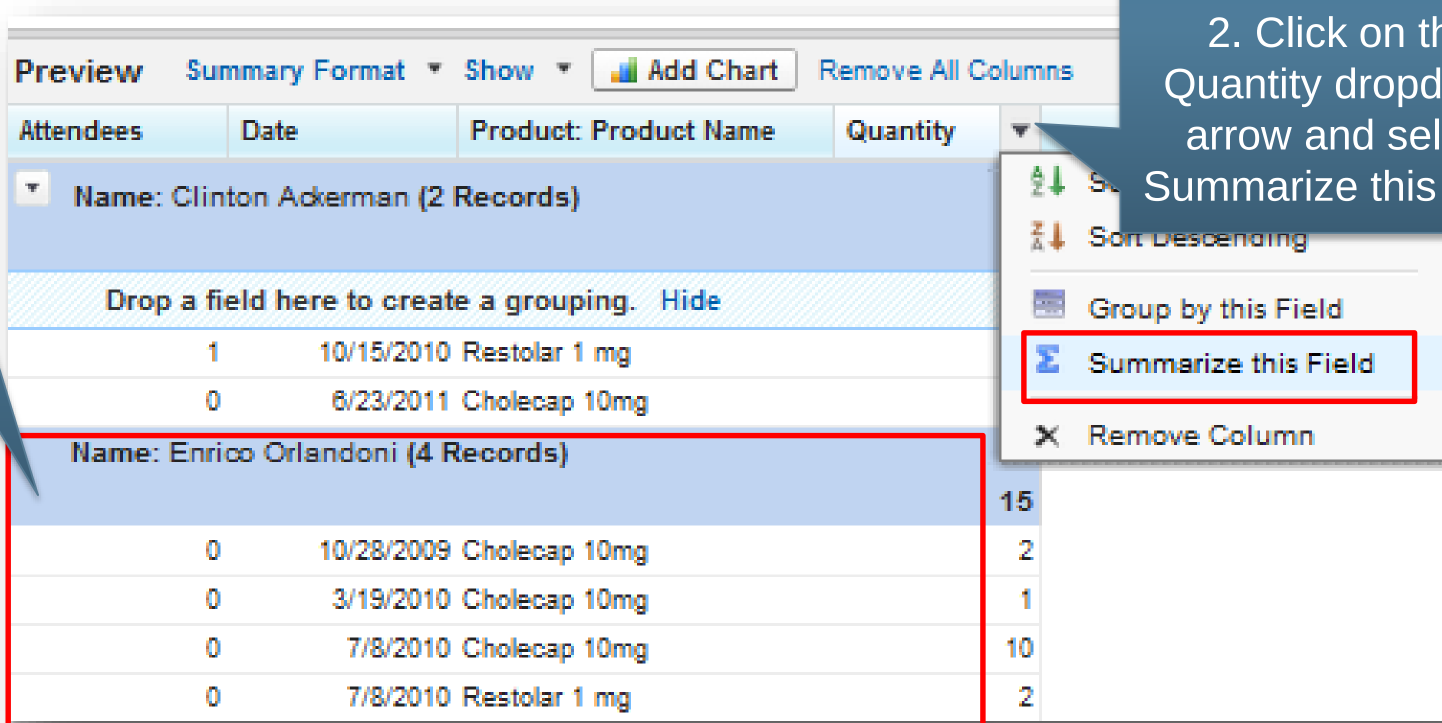
Drag and drop desired fields from the Fields pane into the Preview pane

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



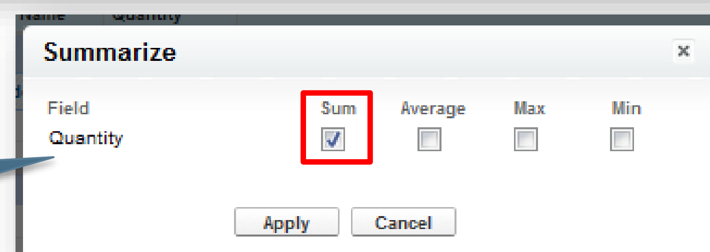
Summarize Field(s)

1. Notice the report is being grouped by Account Name



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

3. Select Sum in the Summarize window



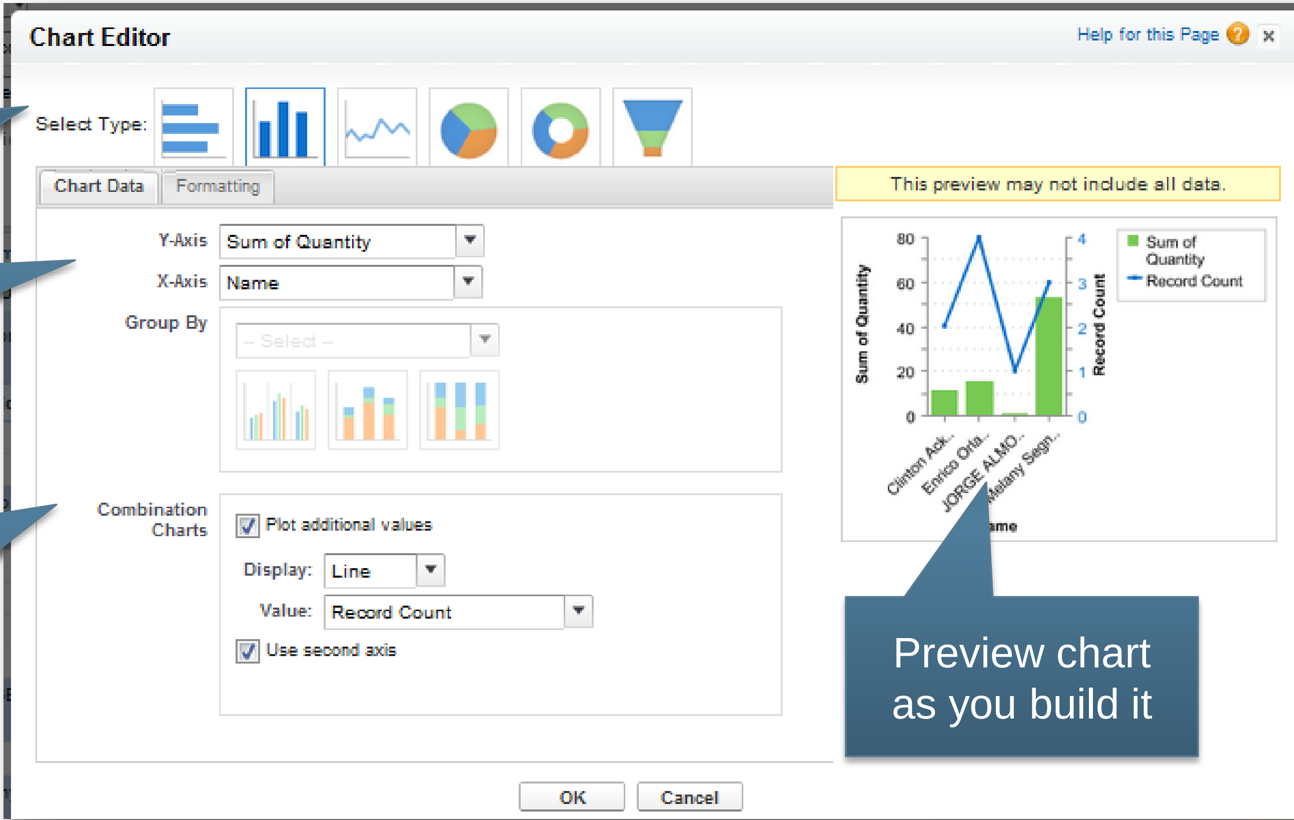
Add Report Charts

- **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



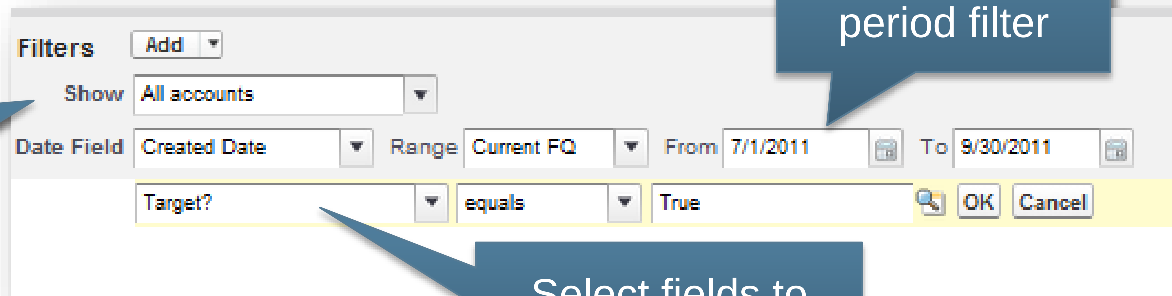
Preview chart as you build it

Add Report Filters

- **Add report filters**

Show All Accounts or My Accounts

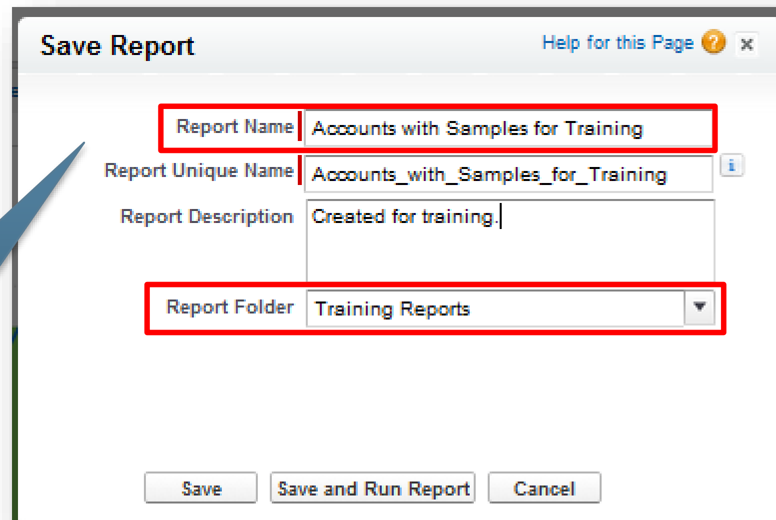
Enter time period filter



Select fields to filter by

- **Save the report**

Specify Name and Folder to save the report in



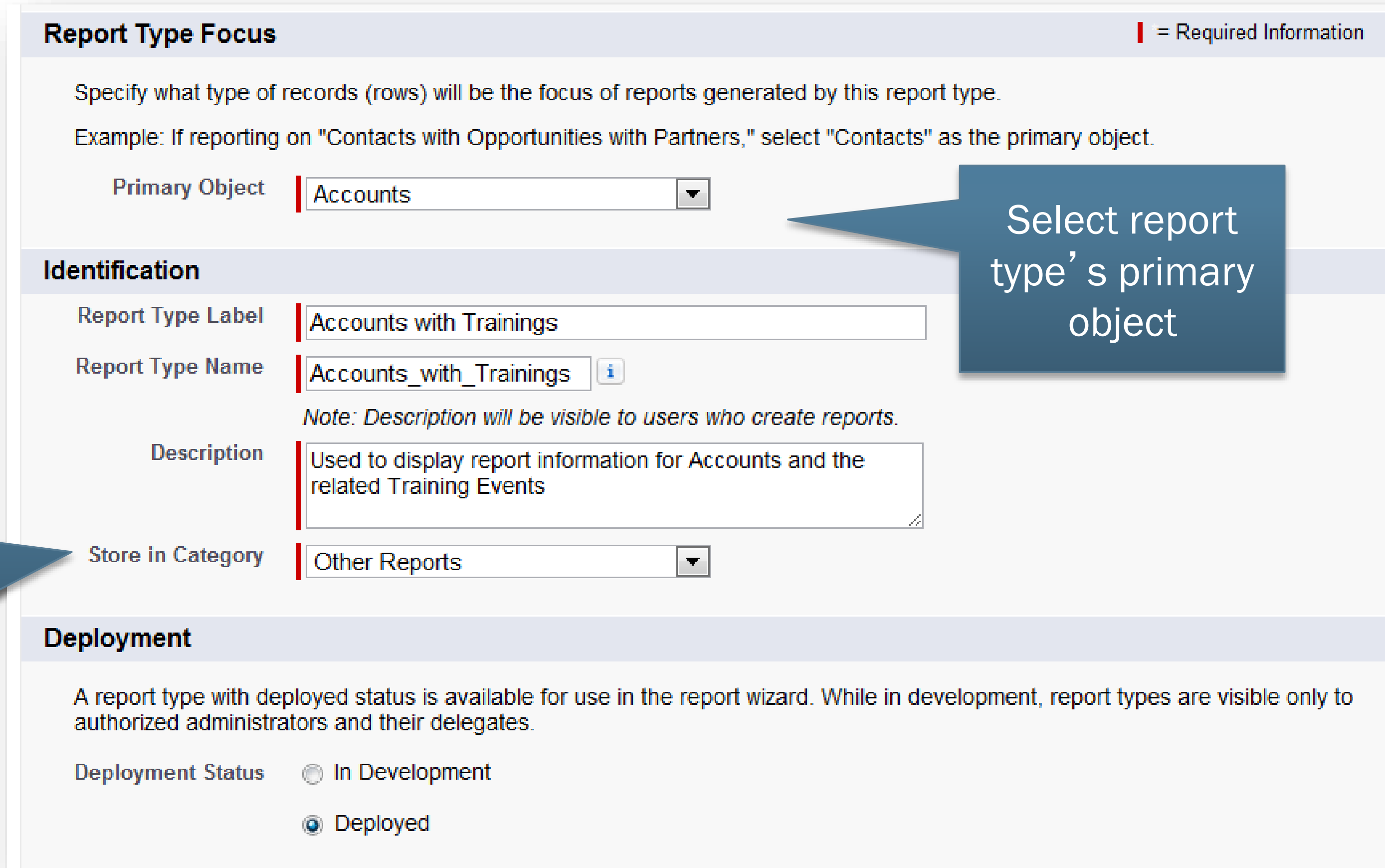
Report Types

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: Accounts

Identification

Report Type Label: Accounts with Trainings

Report Type Name: Accounts_with_Trainings

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

Description: Used to display report information for Accounts and the related Training Events

Store in Category: Other Reports

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

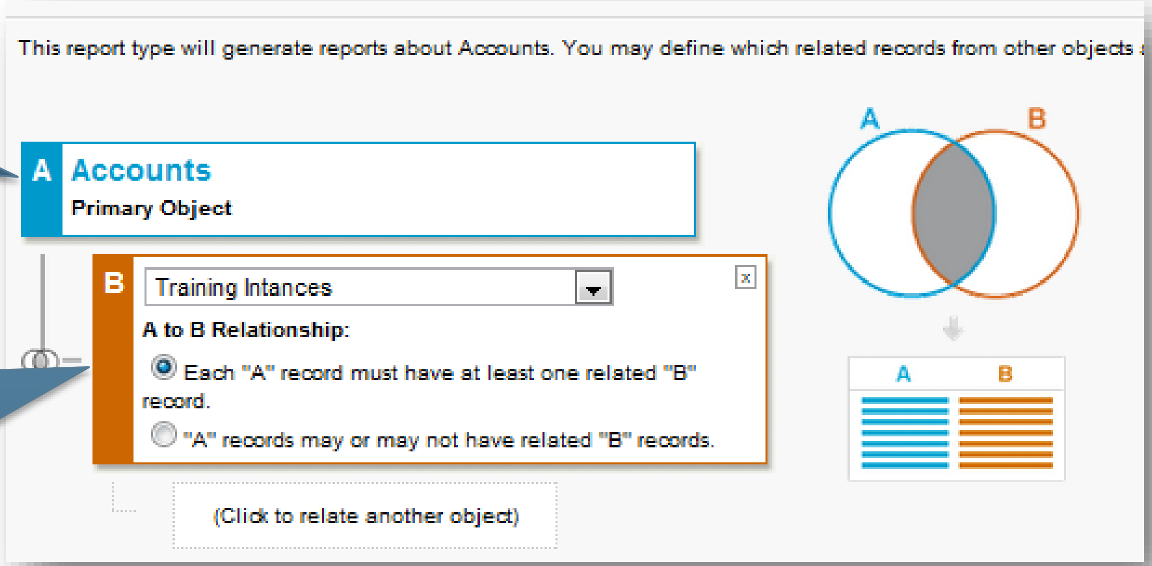
Select report type’s primary object

Select a report category for the report type

Custom Report Types

- **Define report type records set**

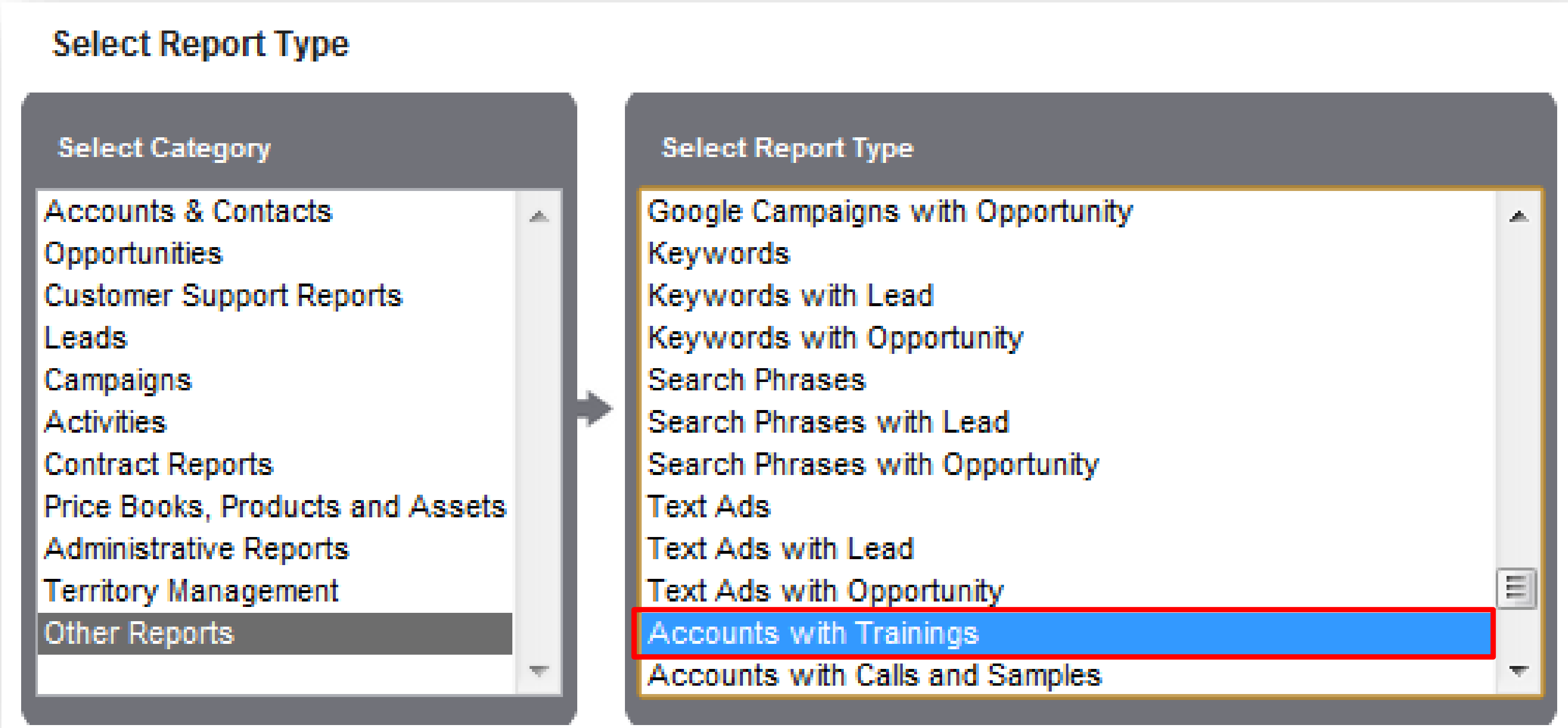
Select detail objects to display data from



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

Custom Report Types

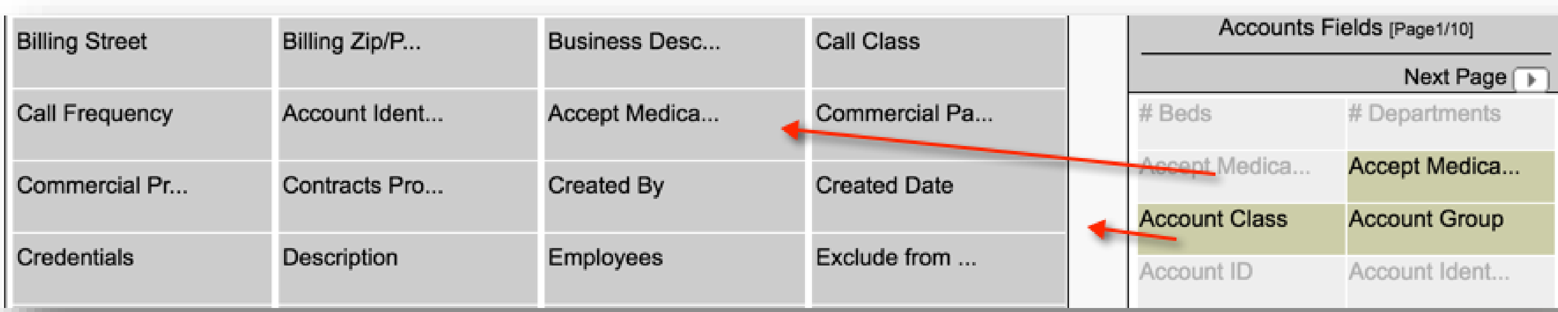
- **New report type displays when creating new custom reports**



Custom Fields and Report Types

- **Custom fields are not automatically added to report type(s) page layouts**

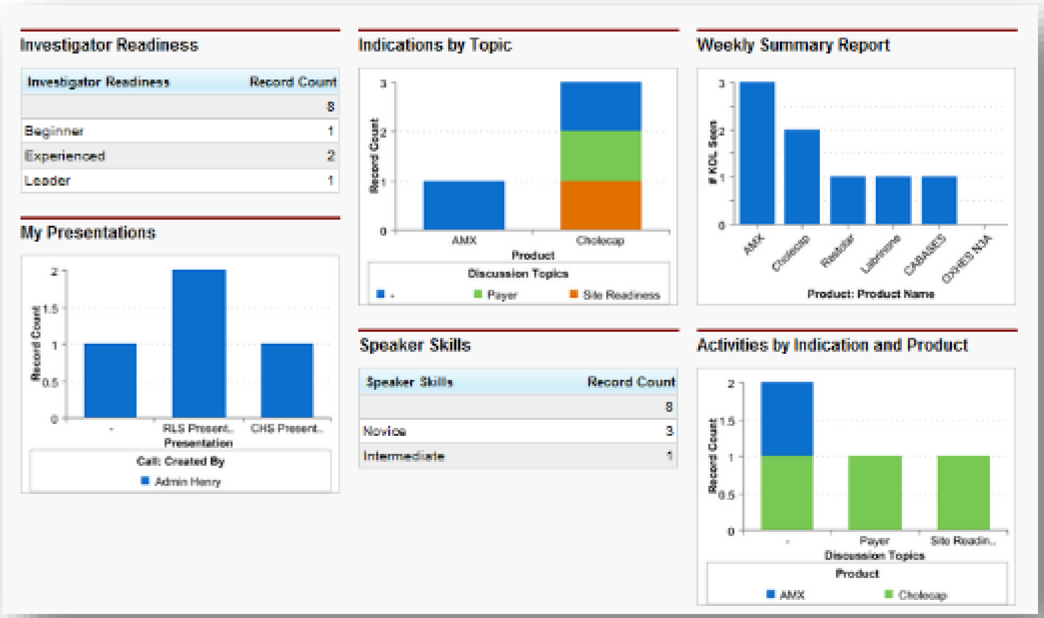
- **After a custom field is added to an object it must be added to the appropriate existing report type(s) page layout(s)**
  - Go to **Setup → Create → Report Types** and click the link to go into the appropriate report type
  - Click the **Edit Layout** button and then place the custom field(s) on the page layout



Dashboards

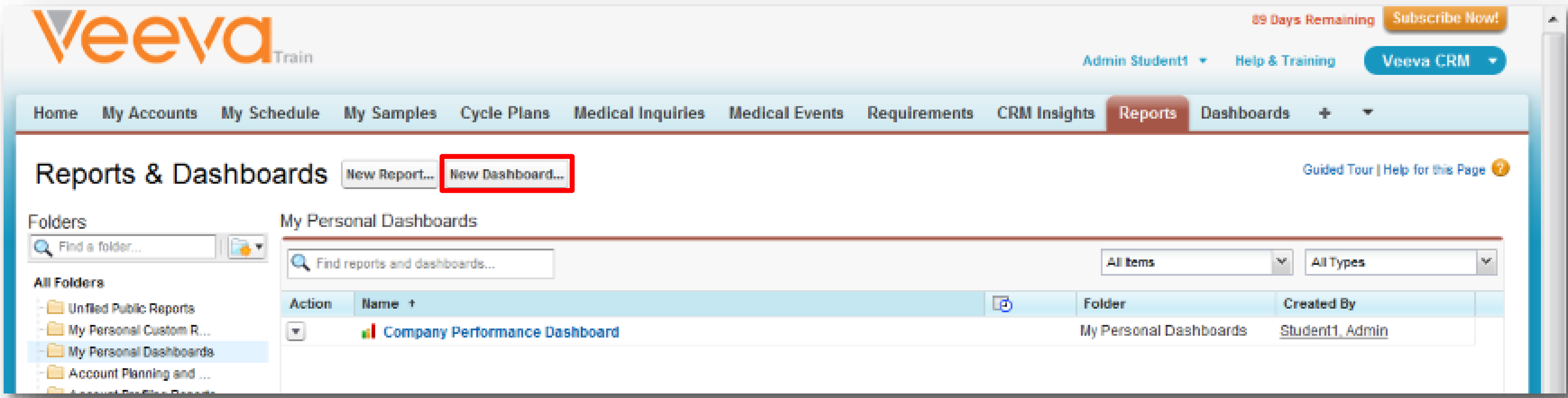
Dashboards

- 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

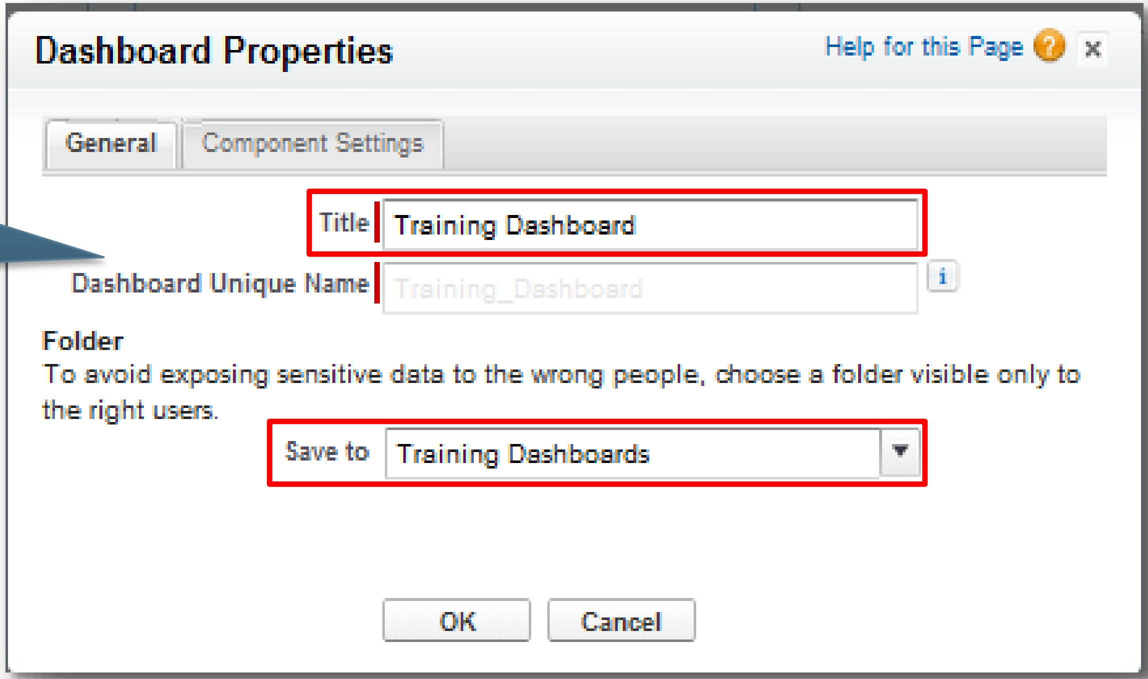


- **Similar to reports, dashboards are organized into folders**
  - Create a dashboard folder if needed

Dashboards

- **Click the Dashboards Properties button**

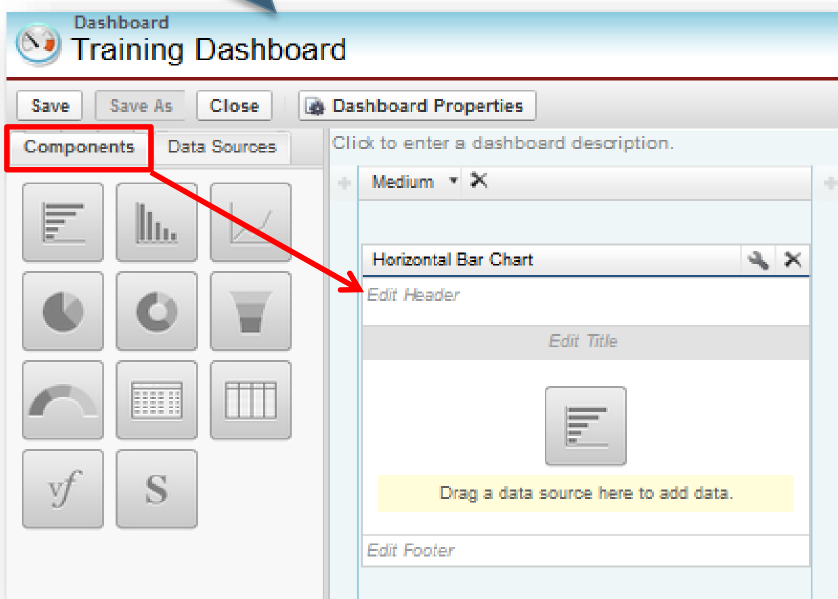
- Specify Title
- Specify Save to folder

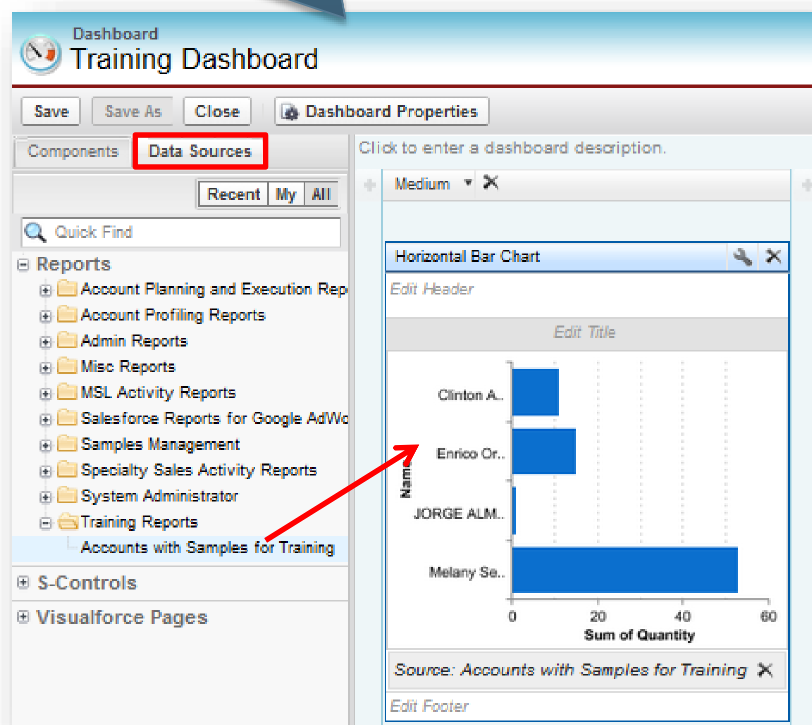


Dashboards

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

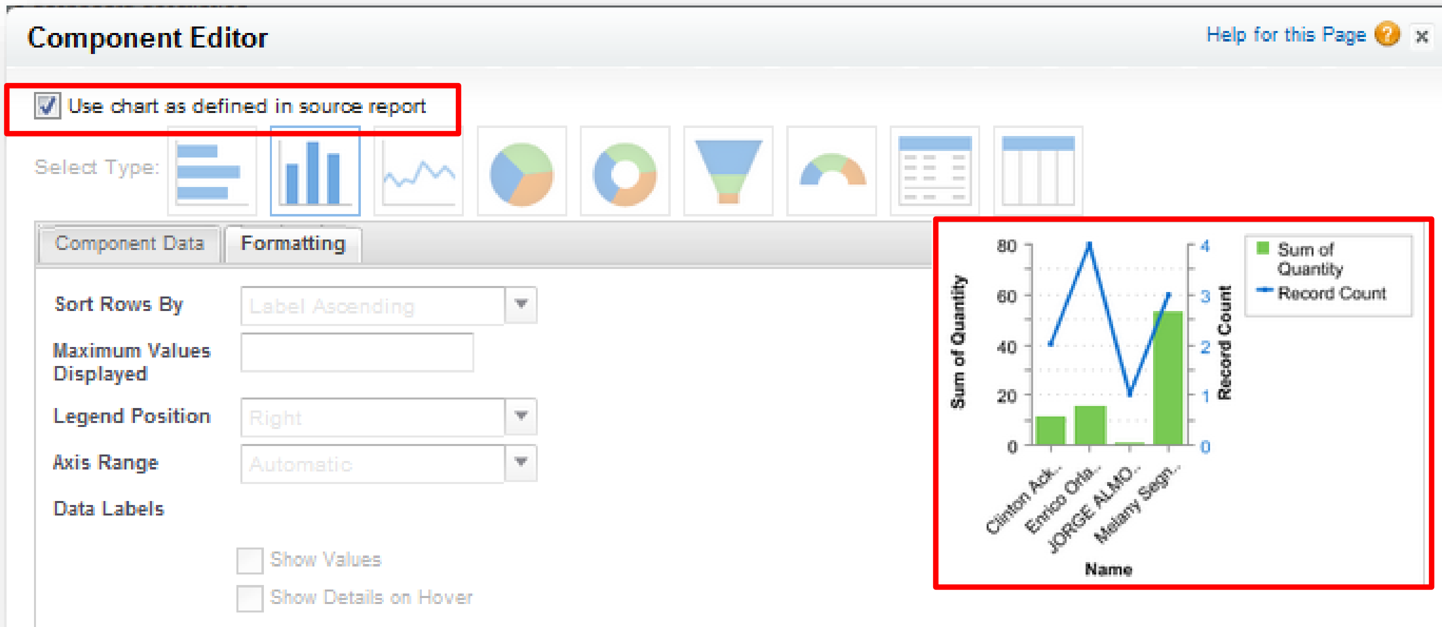




Dashboards

- **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)**

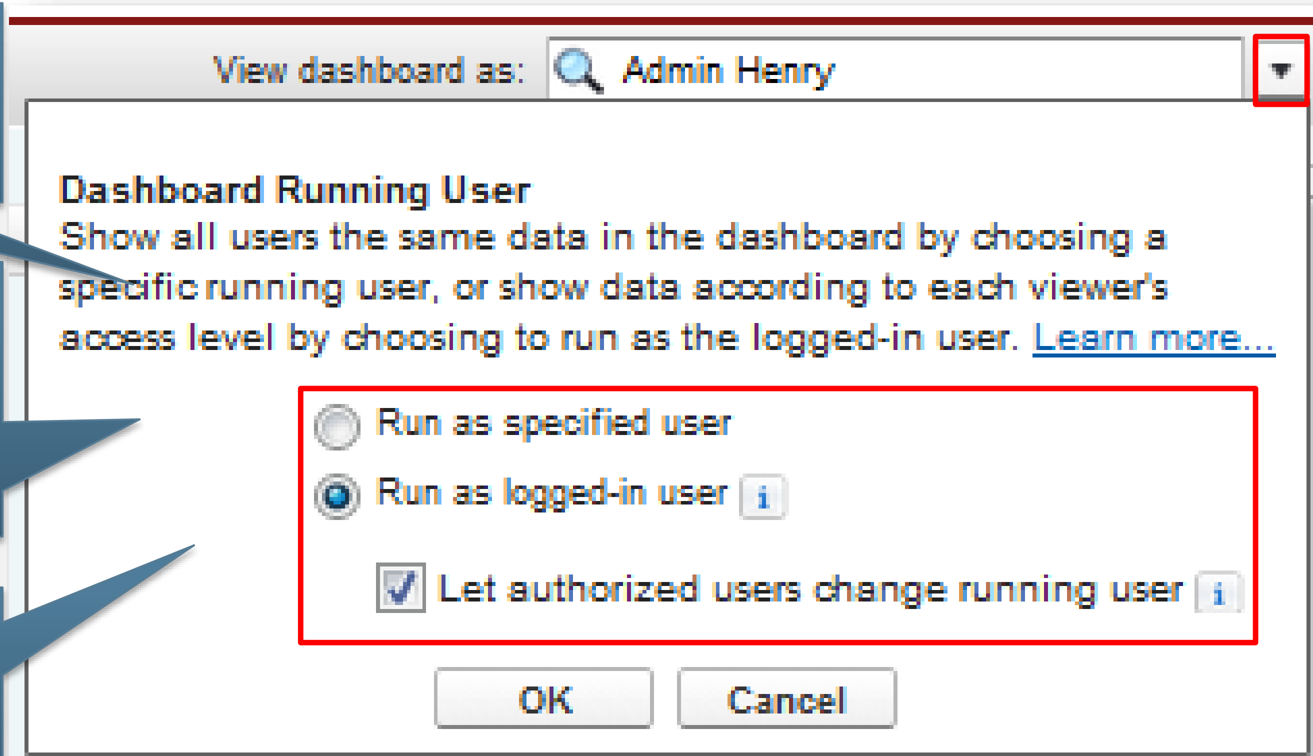


Dashboards

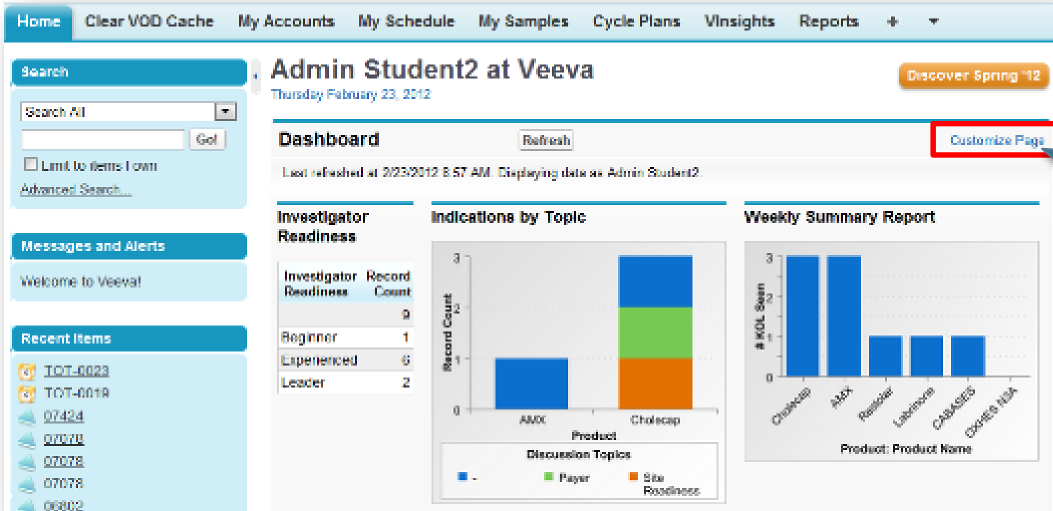
View dashboard as a specified user: All users see the same result set

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

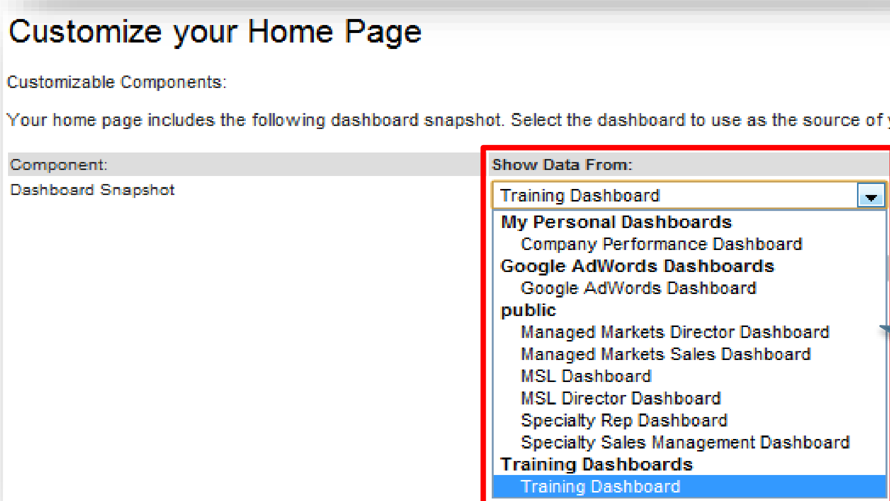
Specify if certain users can change the running user



Customize Home Tab



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



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