

# Agenda

- Introduction on Reports.
  - Types of Report.
- Steps to generate a report.
- Brief introduction on Reports.

# Introduction on Reports

- Salesforce provides powerful reporting and generation tools on the data stored in the objects.
- In reports data displayed is as per running user's security access. Reports can be run on both standard and custom objects. Reports are stored in folders. Users with access to these folders can run the reports.
- Reports data is always generated in real time. When a report is saved, reports configuration parameters are stored - but the generated data is not stored.

# Types of Reports

There are three type of reports-

- **Tabular report:-** This is the most basic report. It displays just the row of records in a table like format with grand total. Tabular reports cannot be used for generating dashboards.
- **Summary report:-** This is the most commonly type of report. It allows grouping of rows of data. It supports sorting and displaying subtotals. For example in a recruiting app, a summary report could be used to display open positions classified by department name.
- **Matrix report:-** This is the most complex report format. Matrix report summarize information in a grid format. Matrix reports allows records to be grouped by both columns and rows.

# Types of Reports continue ...

Note:-

- 1.Summary and Matrix reports can be used to generate dashboards.
  - 2.Reports present in public folders can be emailed to Salesforce users.
  - 3.Report display up to 2000 rows of data. Larger reports can be emailed to Excel.
- Reports provide two options of exporting data into Excel.  
Printable View - Export report with formatting into Excel  
Export Details - Export raw data

# Report generation

Generation of reports requires following steps.

- ❑ Selection of object
- ❑ Selection of report type
- ❑ Select type of information to be displayed  
(example count, average)
- ❑ For summary and matrix reports, specify how fields should be grouped.
- ❑ Select columns on the report
- ❑ Select column order on the report
- ❑ Specify filtering criteria which should be used to select records

# Report Type

There are two type of Reports

## Standard Report type

- ✓
  - ▣ Created when a object is created
- ✓
  - ▣ Created when relationships between objects are created Always inner joins

- ✓
  - ▣ Cannot be modified.

## ▣ Custom Report type

- ✓
  - ▣ Created by Admin or users with “Manager Custom Report types”.
  - ▣ Used to streamline the reporting process.

# Dashboard

## Dashboard:-

Dashboards are graphical representation of reports. Dashboards can be generated for summary or matrix reports (and not for tabular reports). Dashboards display data as per last time report was run.

A dashboard can have up to 20 components

There are five type of dashboards

Chart: Used for comparisons

Table: Good for showing top five, bottom five lists.

Gauge: Used to show progress towards a goal

Metric: Shows a single number

Visual Force page: used to pull data from other sources

# Dashboard continue ...

There are six type of charts

- ❖ Vertical column
- ❖ Horizontal bar
- ❖ Line
- ❖ Donut
- ❖ Funnel
- ❖ Pie

- Funnel is used to show proportion of values against each other.
- Pie is used to demonstrate proportion of single value against total.
- Donut is used to demonstrate proportion of single value against total and also show the total value.



## Dashboard continue ...

- ❖ The folder in which dashboards are stored determines which user has access to running the dashboard. The dashboard data is based upon the reports data. 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
- ❖ Dashboard also support automatic refresh and email. The refresh and email can also be scheduled at intervals - daily, weekly, monthly.

Two things that determine access to dashboards:

- ❖ Dashboard Folder
- ❖ Running User

# Limitations of salesforce reports/ dashboard

## Limitations of Salesforce reports or dashboard:-

Although fairly powerful, Salesforce reports have certain limitations. These are explained below.

- Support for trend analysis in Salesforce is fairly limited.
- User Interface of Salesforce reports and dashboards is fixed. Salesforce does not support pixel perfect report.
- Salesforce reports do not support importing data from other sources.
- When displaying objects and their children, Salesforce does not support reporting on objects that do not have any children.
- If an object has two different related lists, then Salesforce reporting does not support displaying both these related lists together.

# Limitations of salesforce reports/ dashboard continue...

To work-around these limitations, Salesforce customers have the following three options.

- ❖ **Reporting as a service:** - Data resides on Salesforce. New Reports get generated from same data source.
- ❖ **BI as a service:** - Data is moved to a different destination on cloud. Reporting is performed on this new data server.
- ❖ **Data warehousing as a service:-** Data is exported to the customers server and reports are generated from the server located at customers location.

# Thank You ...!!!