Pre-Workshop Checklist

Congrats! You are on your way to hosting a Salesforce Lightning Adoption Workshop. We’ve created the checklist below to help you stay on track as you plan and prepare for your workshop. We know you’re already itching to dig in, so first things first – go to the link below to sign up and access a scratch org for this workshop.

CREATE YOUR ORG > https://lightning-platform-workshops.herokuapp.com/adoption

*Scratch orgs expire after 24 hours. Feel free to create as many scratch orgs as you need to practice, with a new one created the day of your workshop.

☐ 4+ weeks out
• Choose a date and venue for your workshop.
• Create and send invitations – include your workshop topic, date, time, and location.
• Promote your workshop on social media.

*Pro tip: Use the provided promo card image to create your invite and promote on social media.

☐ 3 weeks out
• Practice your workshop: You can sign up to access the scratch org for your workshop here.
  > https://lightning-platform-workshops.herokuapp.com/adoption

☐ 2 weeks out
• Fill out your swag request form to get fun gear to share with your attendees.*
  > https://bit.ly/2LJ6x27  [*5+ attendees required]

☐ 1 week out
• Send a reminder email to your attendees.

☐ Day of
• Send an email to your attendees with the link to the Lightning Adoption Workshop Launchpad, where attendees will go to sign up and access their scratch org.
  > https://lightning-platform-workshops.herokuapp.com/adoption

Pro tip: Ask your attendees to sign up and load their scratch org on their computer no more than 24 hours before the workshop. This will save time at the beginning of the workshop.

• If you’re running this workshop for a large group and want to avoid having to wait for orgs to load when your workshop begins, use the poolbot to spin up many orgs at least a few hours in advance of your workshop.

• Have fun and share photos from your workshop!
 Include: #LightningNow #WorkshopInABox.

Have questions or feedback about this workshop, running your own, or the Workshop-In-A-Box program in general? Please reach out here: https://bit.ly/2MyImAF.
Workshop Guide

Track Anything in Salesforce with Lightning Reports and Dashboards
Abstract

Reports and Dashboards in Lightning Experience are better than ever. This 30-minute hands-on workshop will walk you through the new UI and new, only-in-Lightning features.

Launch URL

https://lightning-platform-workshops.herokuapp.com/adoption

Introduction

Our fictitious company organizes its volunteering program using Salesforce. Employees can create volunteer events, sign up, check in, and more. All of that’s nice for the organizers, who aren’t coordinating events by emails anymore.

But any thing you build using the Salesforce Platform gives you amazing reporting capabilities. Today, we’re going to explore reports and dashboards in Lightning.

Let’s take a look at our existing reports to get a feel for what’s there already.

Review of Current App

Our app is pretty simple—we have organizations, volunteer events, and an object called Volunteers that relates a user to a volunteer event they’ve signed up for.

[App Launcher > Volunteering].

Search for Volunteering Dashboard and click on it.
We can easily answer questions like:

- What non-profits are we spending the most time with?
- What areas are we supporting with volunteering?
- Who are our most active volunteers?

Each dashboard component takes us to a report, where we can drill down to records.

To increase our volunteering, we’re going to do 2 things:

- Find the people who don’t volunteer.
- Foster some friendly inter-departmental competition.

Non-volunteers Report

Let’s start with the non-volunteers.

[Reports tab].

[New Report] hey, if you like the old, Classic way of doing things better, it’s still there for you!

Select Users from the Report Type list and Continue.

Like Classic, reports run in preview, and don’t automatically show you all the data. We’re dropped into a standard report for users.

Let’s get rid of some columns we don’t need by clicking the X next to # Active, Profile, Last Login, Alias, and Username.

In classic you would have been doing some right clicks or trying to drag columns off the screen to remove them.
Next, we’ll add a column for **Department**. It’s super easy to find the fields you need, and the search box even shows you where they are in the schema. Select **Department** under User Information.

That’s helpful if you’re working with a report that has the same field on more than one object (like Phone on Accounts AND contacts on the same report).

Next, we can filter out some users that we don’t want on the report. Click on the filters tab.

Type in **User Type** and select **Standard** for the value.

This will make sure that we’re only looking at regular users and not ones created by the system.

And you can **Lock** the filter so that people can’t change it while working with the report.

Apply.
And we can also add a cross-filter to focus on users without volunteering.

The Cross Filter is tucked away inside the dropdown.

A cross filter filters on some other related object instead of something that’s actually in the report’s objects. In our example, we’re filtering users by some object (Volunteers) that relates to users, instead of a regular filter on the user object.

Set the cross filter to Users, without, and set the Secondary Object to Volunteers (Created By).

Apply.

Save and Run takes you right to the report.

Name your report something like Non-Volunteers, the corresponding Unique Name (Non_Volunteers) and put it in the Volunteering Report folder.

Save.

You should see our non-volunteering employee on the report.
Now, in the old days, you’d be done with your report and you’d:

- Go find a dashboard.
- Click add.
- Then select this report.
- And configure it.

Behold, the new “Add to Dashboard!” button (in the dropdown).

Now you can add it to our existing dashboard (called Volunteer Dashboard).

If you didn’t already have one going, you could start a new dashboard with that 2nd option.
Boom! We’re already on the dashboard, and we’re just setting up how we want to see the data.

Because our report is a table, with no groupings, the dashboard editor KNOWS that Display should be a table (and not a chart).

We can even add columns, like Department (Type it in the Columns search box)

Check the Show Chatter Photos box and then click Add from the bottom right.

If you haven’t worked with the Lightning Dashboard editor before, you’ll see your new dashboard component on the bottom left of the existing dashboard. We can drop it wherever we want, and resize as needed.

[ Put it somewhere reasonable and resize reasonably :) ]

Save (do this regularly as you’re working) and click Done when you’re all done.

More Advanced Reporting

Reporting on individuals is pretty simple. Let’s build a report to look at volunteering by department (our teams often volunteer together, AND this might inspire some healthy competition).

Find the report named “Department Volunteering” that’s already going (either on reports tab or via Global Search) and click Edit.

It’s a “flat” or tabular report.

We want to look at information by Department, so add that field (Volunteers | Created By: Department) to our Group Rows.

Do the same with Volunteers | Created By: Full Name.

We now have a report of Department > User > Volunteering info.
Now we're going to do a fancy piece of logic.

Bigger departments probably have more hours and volunteers...so let's create a Summary Formula for hours per volunteer.

[It's under the dropdown menu by Columns]

Name it Hours per Volunteer.

Don't know the Salesforce reports formula language by heart? The builder will handle all of that for you.

Click on # Hours (under Volunteers, not Volunteer Events) then Insert.

It'll insert Volunteers_c.Hours_c:SUM into the builder.

This will be the sum of the hours from each volunteer at each event.

They type a / (forward slash) for division, since we're dividing hours by the number of volunteers.

Finally, we need a volunteer count.

We've borrowed an old trick for reporting called the Power of One.
That field is present on the user, so we can use it with **SUM** to get the user count for each department.

Click on **# Created By: Power of One** and **Insert**.

![Image of # Created By: Power of One]

Your finished formula should look like this.

![Image of formula]

**We can also format this column to show up at various places.**

Click **Display**.

Set the **Where** to **Specific Groups** (the **Department**).

We’ll let it set the decimal places to 2 (competition might be fierce!)

Finally, **Apply**.
You’ll see your new formula shows up only at the department subtotal.

A good leaderboard puts the best at the top...

1. Click the dropdown beside Created By: Department.

2. Click Sort By...

3. Select Hours per Volunteer.

4. Click the up arrow beside Created By: Department to reverse the order.

Finally, click the toggle on Detail Rows and Row Counts at the bottom of the builder, since we’re interested in department level, not individual events.
Click **Save & Run** to see the results.

*Now, our teams can gloat about their victory and shame the other departments!*

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**Report Charts**

We can add a report chart to our report. Click **Edit**, then **[Add Chart]**.

We get a chart automatically configured. Click the **Gear** in the top right of the chart to customize it.

Set the **Title** to **Hours per Volunteer**. It updates the chart as you type...pretty cool.

Change the X-Axis to our new **Hours per Volunteer** field that we built.

**Save & Run.**

*That's even easier for people to see who's winning. Let's put this on the dashboard.*

**Dropdown** > **Add to Dashboard** > select **Volunteering Dashboard** > **Add**.

Since we already have one built on the report, the **Use Chart Settings from Report Box** is checked automatically for the dashboard. Click **Add**.

Drag it somewhere nice, resize if you like, and **Save, Done.**

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**Advanced Dashboard Features**

We could make lots of reports—one for each department, or each non-profit organization, etc. But dashboard filters are way less work.

We can reopen a dashboard for editing by clicking **[Edit]**. Let’s add a filter so we can view our volunteering by Department.

+ **Filter**.

Type **Department** for the field and click on **Created By: Department**.

Type **Department** for the **Display Name** *(we can make these user-friendly!)*

**Add Filter Value**.

Leave **Equals** with value of **Sales** with the label of **Sales** and **Apply**.
Now the sales team and its leaders can easily see just their information. We could do this for any team.

Or something even neater....let's take 2 small departments and combine them.

Add **Filter Value**.

Leave **Equals** with value of **Legal, HR** with the label of **Legal and HR** and **Apply**.

**Add, Save, Done.**

*Now, we can select any of our filter values and see results just of those departments. Even cooler, when you click on a report, it’ll be filtered for you already!*

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**Spread the Data Love**

Great organizations are run based on data—you can build nice reports, but how do you keep everyone’s eyes focused on the important metrics? Here are 5 pro tips:

**1. Don't make people come look at reports or dashboards. If it matters, send it to them!**

From the dashboard, click **Subscribe**.

Pick some time/date.

**Select People** (you’re added by default).

Add some people.

**Save.**

**2. Enable (and use!) chatter on reports and dashboards.**

**Gear > Setup > type Feed Tracking in search bar >**

Click on **Dashboard > Enable Feed Tracking > Save.**

![Fields in dashboards](image)

Click on **Report > Enable Feed Tracking > Save.**
[Go back to your dashboard by finding the browser tab]

Click + Follow *(big changes to this dashboard will show up in your chatter feed)*.

Refresh if you don’t see + Follow.

Click the conversation button (shown at right) to mention someone so they can see some data.

3. Favorites

If you’ve got a favorite dashboard or report, add it to your favorites with the “favorite star.”

4. Share by Export

Go to the Volunteering with Organizations report.

*Eventually, you’re going to need to get a report into Excel. Either because some really geeky person wants to do some hard core data analysis there, or because you need to send the data to someone who’s not using Salesforce, like maybe one of your non-profits who wants a volunteer list.*

Click Export from the dropdown on the report. *Now, you’re able to choose a formatted version of the report so your excel looks prettier. You can still export the straight version as excel or CSV.*

5. Get Organized

*One of the biggest requests from customers was recently delivered in Lightning: subfolders!* 

[Click on Reports tab].

All Folders.

Volunteer Reporting.

New Folder.

Give it a name and unique name.

Save.

*Looks, subfolders! Now you can have a folder for each department, geographic area, app, etc.*
**Conclusion/Takeaways**

Reports and Dashboards really are better in Lightning. We’ve made it friendlier for both Admins and End Users to do their own reporting, and hopefully you’ve got some ideas to spread the data love.

There’s more great content on Trailhead to go deeper on reporting, and as always, we’re still building out new features to make it better.

- Stuff that exists only on Classic (example: creating joined reports).
- Totally new features.

**Feature Wish List**

Things that didn’t fit in this workshop, but might be nice to add at some point:

- Filter logic (1 and 2 and (3 or 4)).
- Last N examples in a report filter.
- Bucket field.
- Dashboard drill url (only in Lightning).
- Reports or dashboards in App Builder.

**Build Task Tracker**

Chatter photos for all these users?