

Implement and Manage CRM Analytics (ANC301)

ID ANC301 **Price** 1,957.50 € (excl. tax) **Duration** 3 days

Course Overview

If your responsibilities include developing a Wave environment that contains Salesforce and external data, setting up Wave data security, and creating attractive and effective dashboards that require advanced queries, taking this class will boost your skills to the next level.

In this 3-day instructor-led course, you will learn how to set up users in Wave, load and transform Salesforce and external data in Wave with JSON metadata files, and configure data security with apps and row-level security. You will also learn how to apply desktop and mobile layouts to dashboards by customizing dashboard JSON files, modify dashboard queries by updating compact form and SAQL queries, and update metadata with an XML file.

Who should attend

Connect and Integrate Your Data in Wave Analytics is ideal for integration specialists who want to learn more about connecting and securing data in Wave. This course is also great for business analysts or developers interested in creating advanced dashboards.

Prerequisites

Salesforce knowledge, including: navigation, schema, security models, users, profiles, and permission sets. In addition, students should be proficient in Wave data exploration, building Wave dashboards with the UI, and basic JSON.

Course Objectives

When you complete this course, you will be able to:

- Determine your user, data, and security requirements, and establish a development process.
- Set up apps and control what users can do in Wave

Analytics by assigning them permission set licenses, permission sets, and app permissions.

- Load an external CSV file to Wave and create and run a dataflow JSON file that loads Salesforce data and combines it with data from an existing dataset.
- Understand and implement data security in Wave and override security for implementation and testing.
- Apply a Wave Analytics layout template to a dashboard and create a mobile dashboard layout.
- Explain the limitations of filters in lenses and dashboards in the UI, and overcome these by modifying the compact form query.
- Explain the process of dashboard queries and modify a SAQL query to meet many analytic requirements.
- Create and upload an XMD file to modify a dataset's metadata.

Detailed Course Outline

Discovery and Planning

- Discovery Meeting
- Getting Logged In
- Planning the Development

Setting Up Users and Apps

- Overview of Wave Analytics Editions, Licenses, and Permissions
- Creating Wave Analytics Permission Sets
- Assigning Permission Set Licenses and Permission Sets
- Creating and Sharing Wave Analytics Apps

Connecting Data

- Overview of Connecting Data
- Data Mapping
- Overview of the Dataflow Process
- Designing a Dataflow
- Loading External CSV Data into a Dataset
- Creating and Running a Dataflow
- Combining Multiple Datasets in a Dataflow Using Transformations
- Running, Monitoring, and Scheduling a Dataflow

Security – Controlling Access to Data

- Overview of Security in Wave Analytics
- Determining Security Requirements
- Overview of Using Predicate Filters with Salesforce Data
- Implementing Ownership-Based Row-Level Security
- Implementing Role-Based Row-Level Security
- Implementing Team-Based Row-Level Security
- Implementing Row-Level Security with External Data
- Overriding Security for Implementation and Testing

Building Dashboards with Templates and Mobile Layouts

- Overview of JSON for Dashboards
- Updating the Dashboard JSON File from the lens.apexp Page
- How the Widgets Section of Dashboard JSON Works
- Building a Dashboard Using an Existing Layout
- Wave Analytics Dashboard Templates
- Translating Browser Dashboards to a Mobile Device
- Creating Mobile Dashboard Layouts in the Dashboard JSON

Filtering and Binding in Dashboards

- Limitations of Filters in Lenses and Dashboard in the UI
- Creating a Dynamic Top-N Filter
- Creating a Multi-Dataset Dashboard with Selection Binding
- Creating a Dynamic Filter with Results Binding

Modifying Queries in Dashboards

- Overview of Modifying Queries in a Dashboard
- SAQL Overview
- Adding a SAQL Tester Bookmarklet
- Creating a YoY Growth Dashboard
 - Part 1: Creating a Container Dashboard
 - Part 2: Capturing a SAQL Query and Testing it in the Bookmarklet
 - Part 3: Updating the Query with a Custom Calculation and Adding the Query to a Step's Dashboard JSON
 - Part 4: Updating the Compact Form with the Custom Measure
 - Part 5: Enabling Faceting with Selections Bindings

Modifying Metadata in Lenses and Dashboards

- Overview of Extended Metadata (XMD)
- Backing Up and Uploading a Dataset's XMD File
- Adding Quick Action Menus For Records in Wave

About Fast Lane



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