

WORKING WITH DATA AND DASHBOARDS IN EINSTEIN ANALYTICS



OVERVIEW

If your responsibilities include developing an Einstein Analytics environment that contains Salesforce and external data, setting up an Einstein Analytics 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 an Einstein Analytics, load and transform Salesforce and external data, and configure data security with apps and row-level security. You will also learn how to apply desktop and mobile layouts to dashboards using the Einstein Analytics Dashboard Designer, modify dashboard queries by updating compact form and SAQL queries, and update metadata with an XML file.

WHO SHOULD TAKE THIS COURSE?

Working with data and dashboards in Einstein Analytics is ideal for integration specialists who want to learn more about connecting and securing data in Einstein Analytics. This course is also great for business analysts or developers interested in creating advanced dashboards.

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 Einstein Analytics by assigning them permission set licenses, permission sets, and app permissions.
- Load an external CSV file to Einstein Analytics, configure data replication schedules, create and run dataflows to load Salesforce data, and combine it with data from existing datasets.
- Understand and implement data security in Einstein Analytics and override security for implementation and testing.
- Apply an Einstein Analytics layout template to a dashboard and create a mobile dashboard layout.
- Explain the limitations of filters in lenses and dashboards, and overcome these through UI settings and 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.

PREREQUISITES

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

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DURATION

- 3 days

DELIVERY FORMAT

- Classroom

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MODULES & TOPICS

Discovery and Planning

- Discovery Meeting
- Getting Logged In
- Establishing Your Users and Development Process

Setting Up Users and Apps

- Overview of User Access on the Einstein Analytics Platform
- Creating Einstein Analytics Permission Sets
- Assigning Permission Set Licenses and Permission Sets
- Creating and Sharing Einstein 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
- Optimizing Dataflows
- Running, Monitoring, and Scheduling a Dataflow
- Preparing Data with Dataset Recipes
- Additional Dataflow Transformations

Securing Your Data

- Overview of Security in Einstein Analytics
- Determining Security Requirements
- Overview of Using Predicate Filters with Salesforce Data
- Implementing Ownership-Based Row-Level Security
- Implementing Role-Based Row-Level Security

Securing Your Data (continued)

- Implementing Team-Based Row-Level Security
- Overriding Security for Implementation and Testing

Building Dashboards with Templates and Mobile Apps

- Overview of Einstein Analytics Dashboard Layout Templates
- Overview of JSON for Dashboards
- Building a Dashboard Using an Existing Layout
- Translating Browser Dashboards to a Mobile Device
- Creating/Updating Mobile Dashboard Layouts

Connecting Data Sources, Results and Selection Bindings

- Limitations of Filters in Lenses and Dashboard in the UI
- Creating a Dynamic Top-N Filter
- Optimize a Multi-Dataset Dashboard by Connecting Data Sources
- Creating a Dynamic Filter with Results Binding
- Dynamically Adjust a Chart with Static Steps

Modifying Queries in Dashboards

- Creating a YoY Growth Dashboard
- Creating a Sales Delta Dashboard
- Overview of Modifying Queries in a Dashboard
- SAQL Overview
- Add an External Salesforce Object to a Einstein Analytics Dashboard

Using Extended Metadata in a Dataset

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



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