

# WORKING WITH DATA AND DASHBOARDS IN EINSTEIN ANALYTICS



## OVERVIEW

If your responsibilities include developing and implementing an Einstein Analytics environment that contains Salesforce and non-Salesforce data, setting up Einstein Analytics data security, and creating dashboards that require advanced functionality and edits to 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 Einstein Analytics, load and transform Salesforce and non-Salesforce data, and configure data security with apps and row-level security predicates. You will also learn how to modify dashboard queries in JSON and Salesforce Analytics Query Language (SAQL), and update extended metadata.

## 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 licenses, permission sets, and app permissions.
- Load an external CSV file to Einstein Analytics.
- Create and run dataflows to load Salesforce data, and join it with data from other datasets.
- Understand, enable, and use Data Sync effectively.
- Understand and implement data security in Einstein Analytics and override security for implementation and testing.
- Understand how filters on dashboards function and be able to use binding when necessary.
- Know when and how to modify a dashboard's JSON file. Explain the process of dashboard queries and modify a SAQL query to meet specific analytic requirements.
- Modify dataset metadata.

## PREREQUISITES

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

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**DURATION**

- 3 days

**DELIVERY FORMAT**

- Classroom

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## MODULES & TOPICS

### Discovery and Planning

- Discovery Meeting
- 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 Licenses and Permission Sets to Users
- Creating and Sharing Einstein Analytics Apps

### Connecting Data

- Overview of User Access on the Einstein Analytics Platform
- Creating Einstein Analytics Permission Sets
- Assigning Licenses and Permission Sets to Users
- Creating and Sharing Einstein Analytics Data
- Connecting Data
- Overview of Connecting Data
- Data Mapping
- Overview of the Dataflow Process
- Designing a Dataflow
- Loading External CSV Data
- Creating Dataflows
- Optimizing Dataflows
- Running, Monitoring, and Scheduling a Dataflow
- Preparing Datasets with Recipes
- Data Connectors
- Additional Dataflow Transformations

### Securing Your Data

- Overview of Security in Einstein Analytics
- Determining Security Requirements
- Overview of Using Predicate Filters
- Implementing Ownership-Based Row-Level Security
- Implementing Role-Based Row-Level Security
- Implementing Team-Based Row-Level Security
- Overriding Security for Implementation and Testing

### Extended Metadata in a Dataset

- Overview of Extended Metadata (XMD)
- Updating Field Metadata
- Adding Quick Action Menus For Records in Einstein Analytics

### Dashboard Templates and Mobile Dashboards

- Overview of Einstein Analytics Dashboard Layout Templates
- Overview of JSON for Dashboards
- Overview of Einstein Analytics Dashboard Templates
- Building a Dashboard Using a Template
- Optimizing Dashboards for a Mobile Device

### Bindings in Dashboards

- Understanding Filters in Lenses and Dashboards
- Multi-Dataset Dashboards
- Dynamic Filters with Result Binding
- Static Steps

### Modifying Queries

- Overview of Modifying Queries in a Dashboard
- Maximizing the Use of the Compare Table
- Salesforce Analytics Query Language (SAQL)
- SAQL Queries in an Einstein Analytics Dashboard



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