



IMPROVED USAGE TRACKER

TAKE IT FURTHER - USE CASES



Take it further...Opportunity Analysis

Who's been viewing which Opportunities? As you look at any Opportunity you can easily see who and how often people have been engaging with each opportunity over time.

1. Create a new Report...as follows...

REPORT ▼

Help Interactions by Opportunity

Help Interactions with Related Opportunity

Outline Filters 1

Groups

GROUP ROWS

Add group...

Created Date/Time

Help Interaction: Created By

GROUP COLUMNS

Add group...

Columns

Add column...

Help Interaction: Name

Related Opportunity: Opportunity N

Outline Filters 1

Filters

Add filter...

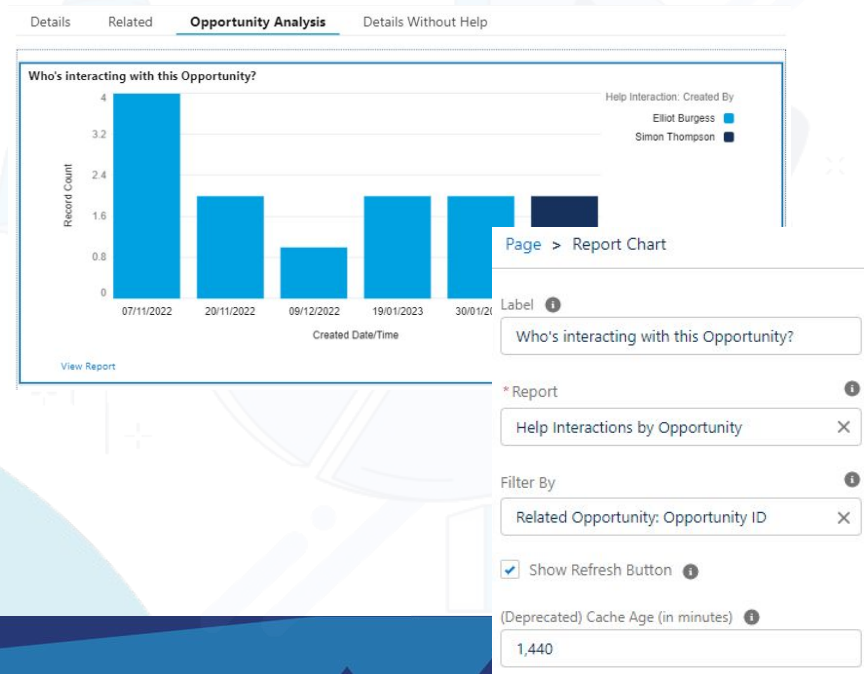
Show Me

All help interactions

Created Date/Time

Last 120 Days (04-Oct-2022 - 31-Jan-2023)

1. On Opps Detail Page, create a new tab 'Opportunity Analysis'.
2. Drop the Report Chart Component & Configure as follows...



Take it further...Case Analysis

As you look at any Cases you can easily see who and how often people have been engaging with each Case. **Stop cherry picking Cases!**

1. Create a new Report...as follows...

REPORT ▼

Case Page Load Interaction ✎

Help Interactions with Related Case

Outline Filters 2

Groups

GROUP ROWS

Add group...

Created Date/Time

Help Interaction: Created By

GROUP COLUMNS

Add group...

Columns

Add column...

Help Interaction: Name

Outline Filters 2

Filters

Add filter...

Show Me

All help interactions

Created Date/Time

All Time

Help Interaction Type

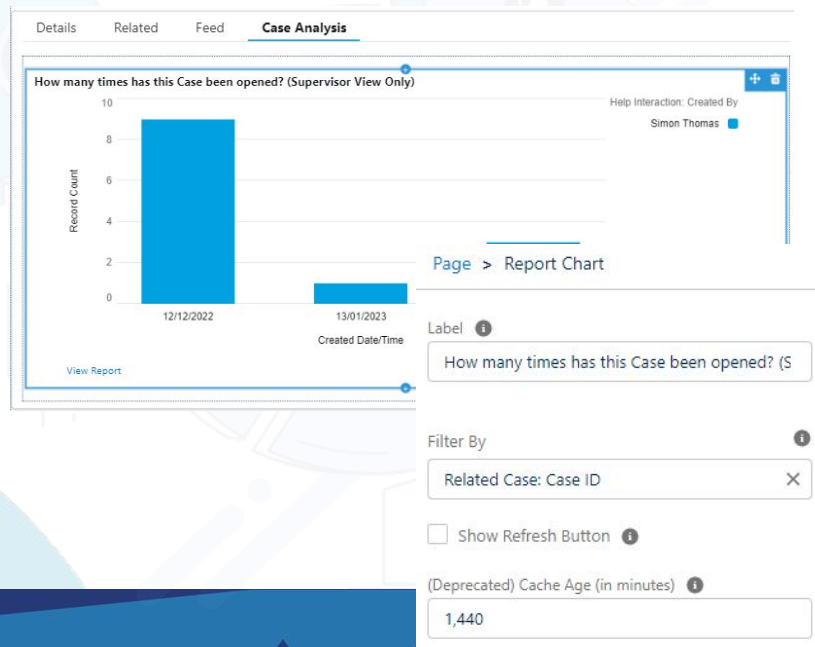
equals Position Detector

Context Log

Component Id

equals Case_Viewed

1. On Cases Detail Page, create a new tab 'Case Analysis'.
2. Drop the Report Chart Component & Configure as follows...



Take it further...Knowledge Analysis

Salesforce Knowledge analysis is pretty limited.

This is a way to track knowledge article page views by role or anything else from the User object

1. Create a new Lookup field on Help Interaction Object...to the Knowledge Object...
2. Create a simple Flow that uses the Help Interaction 'Context' field to link to the right Knowledge Article

Help Interaction Custom Field
Related Article
Back to Help Interaction

Custom Field Definition Detail

Field Information	Field Label	Related Article
Field Name	Related Article	
API Name	Related_Article__c	
Description		
Help Text		
Data Owner		
Field Usage		
Date Sensitivity Level		
Compliance Categorization		
Created By	Simon Thomas	04/02/2023 05:49

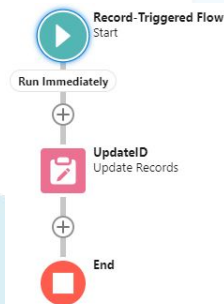
Lookup Options

Related To	Knowledge
Related List Label	Help Interactions

Condition Requirements

All Conditions Are Met (AND)

Field	Operator	Value
iahelp__Context__c	Starts With	ka0
AND		
iahelp__HelpInteractionType__c	Equals	Position Detector Context Log



1. On Knowledge Page drop the 'Position Detector' component and call it 'Knowledge Page'
2. Create a Report on Help Interactions Configure as follows...

Outline

Filters

Groups

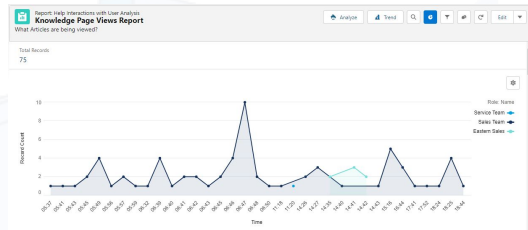
GROUP ROWS

fx Time

Component Id

Role: Name

GROUP COLUMNS



Columns

Add column...

Created Date/Time

Help Topic: Name

Help Reading List:

Description

Related Article Title



Report: Help Interactions with User Analysis Knowledge Engagement by User Over Time

Total Records
68

Article Name	Created Date	February 2023	April 2023	July 2023	Total
☐ Article Title	Record Count	3	0	0	3
☐ Editing THE Master Page	Record Count	0	0	6	6
☐ Improved Usage Tracker	Record Count	33	0	0	33
☐ Policy Management	Record Count	2	0	0	2
☐ SFDC User Guide	Record Count	22	2	0	24
Total	Record Count	60	2	6	68

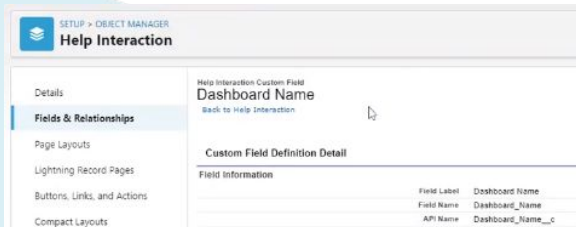


Take it further...Dashboard Analysis

How to track what users are accessing what Dashboards over time...[See this video](#)

Salesforce does not track which Dashboards are being used by whom. This is a way to track Dashboard views by role or anything else from the User object

1. 'Help Interaction' Object create a new text field 'Dashboard Name'



Setup > OBJECT MANAGER
Help Interaction

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Help Interaction Custom Field
Dashboard Name
Back to Help Interaction

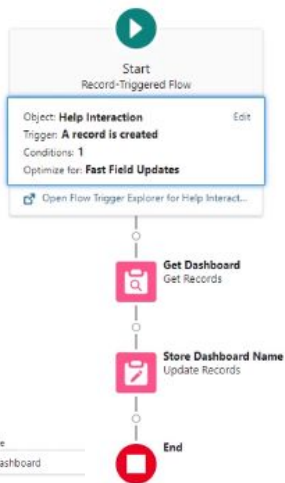
Custom Field Definition Detail

Field Information	Field Label	Dashboard Name
	Field Name	Dashboard__Name
	API Name	Dashboard__Name__c

Condition Requirements

All Conditions Are Met (AND)

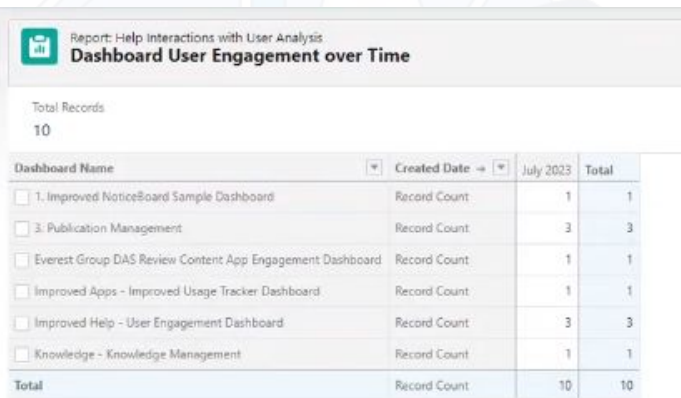
Field	Operator	Value
ishelp_ContextObjectLabel__c	Equals	Dashboard



2. Create a Flow triggered when 'Help Interaction' record is created with 'ContextObjectLabel' = Dashboard

3. Get whatever Dashboard information you need from a simple lookup - We suggest at least the Dashboard Title and update the record that triggered the Flow.

Create a Report on Help Interactions looking at 'Dashboard Name' - Configure as per the [video here](#)...



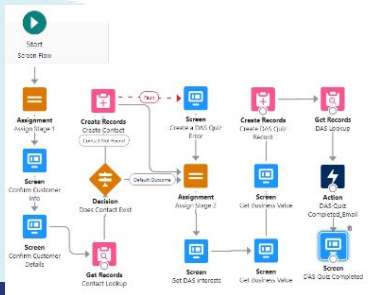
Report: Help Interactions with User Analysis
Dashboard User Engagement over Time

Total Records
10

Dashboard Name	Created Date	July 2023	Total
☐ 1. Improved NoticeBoard Sample Dashboard	Record Count	1	1
☐ 3. Publication Management	Record Count	3	3
☐ Everest Group DAS Review Content App Engagement Dashboard	Record Count	1	1
☐ Improved Apps - Improved Usage Tracker Dashboard	Record Count	1	1
☐ Improved Help - User Engagement Dashboard	Record Count	3	3
☐ Knowledge - Knowledge Management	Record Count	1	1
Total	Record Count	10	10

Salesforce does not track which Flows are being used by whom. This is a way to track Flow screen views by role or anything else from the User object

1. Drop the 'Position Detector' on your Flow screens and think of a naming convention to identify each screen shown to the user.
2. Create a Report on the 'Help Interactions with User Analysis' Report type, showing specific Flow engagement or engagement across all Flows.



Report: Help Interactions with User Analysis

Total Records

10

Component Id	Created Date →	April 2023	Total
☐ Flow Create Case - Contact Info	Record Count	2	2
☐ Flow Create Case - Create Case	Record Count	2	2
☐ Flow Create Case - Email Info	Record Count	2	2
☐ Flow DAS - Contact Email	Record Count	2	2
☐ Flow DAS - Interests	Record Count	2	2
Total	Record Count	10	10



Even more Use cases

- Deploy within your Experience Cloud (aka Communities)
- Deploy on your Salesforce Mobile App(s)
- If you can drop a component on a page...we can track it!
- Don't forget to review the 'Improved Help for Lightning' App and Help Settings, where you can manage the tracking data that is collected.

