

Installation Guide

Step 1: Install the Appexchange package.

Visit <http://appexchange.salesforce.com/listingDetail?listingId=a0N30000005uvAVEAY> and click on the “Get It Now” button.

A yellow rectangular button with the text "Get It Now" in bold black font.

Select the appropriate options and click “Continue”.

If you are presented with the Salesforce.com login screen, enter your login credentials for the Salesforce.com instance you would like to install SALYTICS usage analytics to.

Next, review the package and check the terms & conditions checkbox and then click the “Install” button.

What You Are Installing		Where You Are Installing	
Package:	SALYTICS usage analytics	Organization:	SALYTICS, Inc
Version:	SALYTICS Usage Analytics (April 2012 / 1.3.0)	Edition:	Developer Edition
Subscription:	Free Trial	User Name:	ben@76demo.com
Duration:	30 Days		(Logout and try again as a different use)
Number of Subscribers:	3 Subscribers		

☒ I have read and agree to the [terms & conditions](#).

You may need to enter your password once more and then you should be presented with the package details within the Salesforce.com application. Again, click “Continue” to start the installation wizard.

Click “Next” for Step 1 of 3 in the wizard.

Select security settings (“Select security settings” recommended) in Step 2 of 3 of the wizard.

Click “Install” for Step 3 of 3 in the wizard.

This will start the installation process of SALYTICS within your Salesforce.com instance. Once this has been completed, click “Deploy Now” to finish the package installation process.

SALYTICS usage analytics

Package Details
SALYTICS Usage Analytics (Managed)

◀ Back to List: Installed Package

Install Complete
Follow any remaining steps in the app install guide to complete deployment.

Uninstall View Components Manage Licenses View Dependencies

Package Name	SALYTICS Usage Analytics	Version Number	1.3
Language	English	First Installed Version Number	1.3
Version Name	April 2012	Package Type	Managed
Namespace Prefix	salyticsusa	Allowed Licenses	3
Publisher	SALYTICS, Inc.	Used Licenses	1
Status	Trial	API Access	Unrestricted (Enable Restrictions)
Expiration Date	22/05/2012	Modified By	Ben Griffith, 23/04/2012 1:40 PM
Description	Native force.com application to track and report on the usage of Salesforce.com within an organization.		
Installed By	Ben Griffith, 23/04/2012 1:40 PM		

If SALYTICS usage analytics has been installed to a production Salesforce.com instance, click on the “Manage Licenses” button to assign licenses to your users. By default the trial version of the software includes 3 licenses that can be assigned. Please contact info@salytics.com to request more licenses.

If SALYTICS usage analytics has been installed to a sandbox Salesforce.com instance, all users will have access to the app and licensing does not need to be setup.

Create
Apps
Custom Labels
Objects

New Custom Object Schema Builder

Action	Label	Installed Package	Master Object	Deployed	Description
Edit	Visitor	SALYTICS Usage Analytics		✓	Object to
Edit	Visitor Action	SALYTICS Usage Analytics	Visitor Session	✓	
Edit	Visitor Session	SALYTICS Usage Analytics	Visitor	✓	

If the installation is interrupted before completion, be sure to check that all the objects have been deployed by navigating to ‘Setup’ > ‘App Setup’ > ‘Create’ > ‘Objects’ and ensuring the Deployed column is checked for each of the objects shown above.

Step 2: Add the SALYTICS Home Page Component.

Once the application is installed, the SALYTICS tracking Home Page Component needs to be added to all layouts.

Navigate to ‘Setup’ > ‘App Setup’ > ‘Home Page Layouts’.

App Setup

Customize

Tab Names and Labels

Home

Home Page Components

Home Page Layouts

Custom Links

For each of the layouts listed, edit the layout and check ‘Salytics Usage’ under ‘Select Narrow Components to Show’.

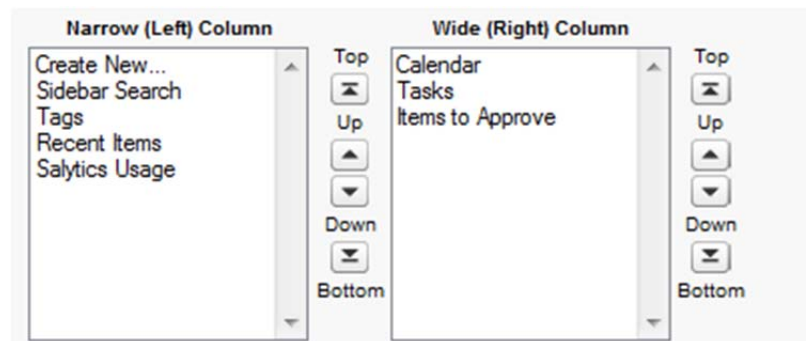
SALYTICS usage analytics



Select Narrow Components to Show

Sidebar Search	☒	Create New...	☒
Document Search	☐	Recent Items	☒
Solution Search	☐	Messages & Alerts	☐
Product Search	☐	Custom Links	☐
Tags	☒	Customer Portal Welcome	☐
Salytics Usage	☒		

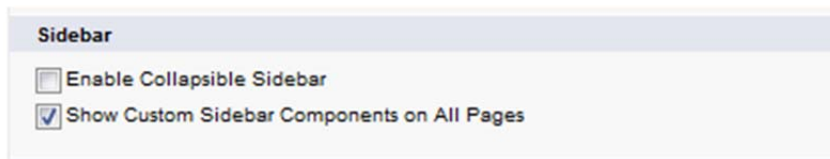
Click Next, make sure 'Salytics Usage' is under 'Narrow (Left) Column' and click Save.



Narrow (Left) Column

Wide (Right) Column

Next, make sure the home page component is displayed on all pages by navigating to 'Setup' > 'App Setup' > 'User Interface'. Check the checkbox 'Show Custom Sidebar Components on All Pages' and click Save.



Sidebar

☐ Enable Collapsible Sidebar

☒ Show Custom Sidebar Components on All Pages

Step 3: Run Dashboards

Visit a record in Salesforce.com first and then navigate to the 'Dashboards' tab.

Select one of the dashboards under 'SALYTICS user analytics Dashboards', such as 'SALYTICS user analytics – Content Reports'. Refresh it and confirm that data has been generated from your record view.

The 4 dashboards provide a starting point for reporting on usage of Salesforce.com within your organization and are broken down as follows:

1. SALYTICS user analytics – Activity & Performance Reports
 - a. These are reports that provide at an aggregate level the number of page views and sessions within Salesforce.com over a 90 day period period. Additionally the average session time is displayed here and reports detailing the average page load times and the best and worst load times by page.
2. SALYTICS user analytics – Client Reports
 - a. Client reports show the details on users' browsers and screens. Let's you know the resolution of the monitors/screens users are using and the different browsers that are being used for Salesforce.com.
3. SALYTICS user analytics – Content Reports
 - a. These reports start to get into the details of the content that is being accessed within Salesforce.com and how it is being accessed. Reports let you know what the most common

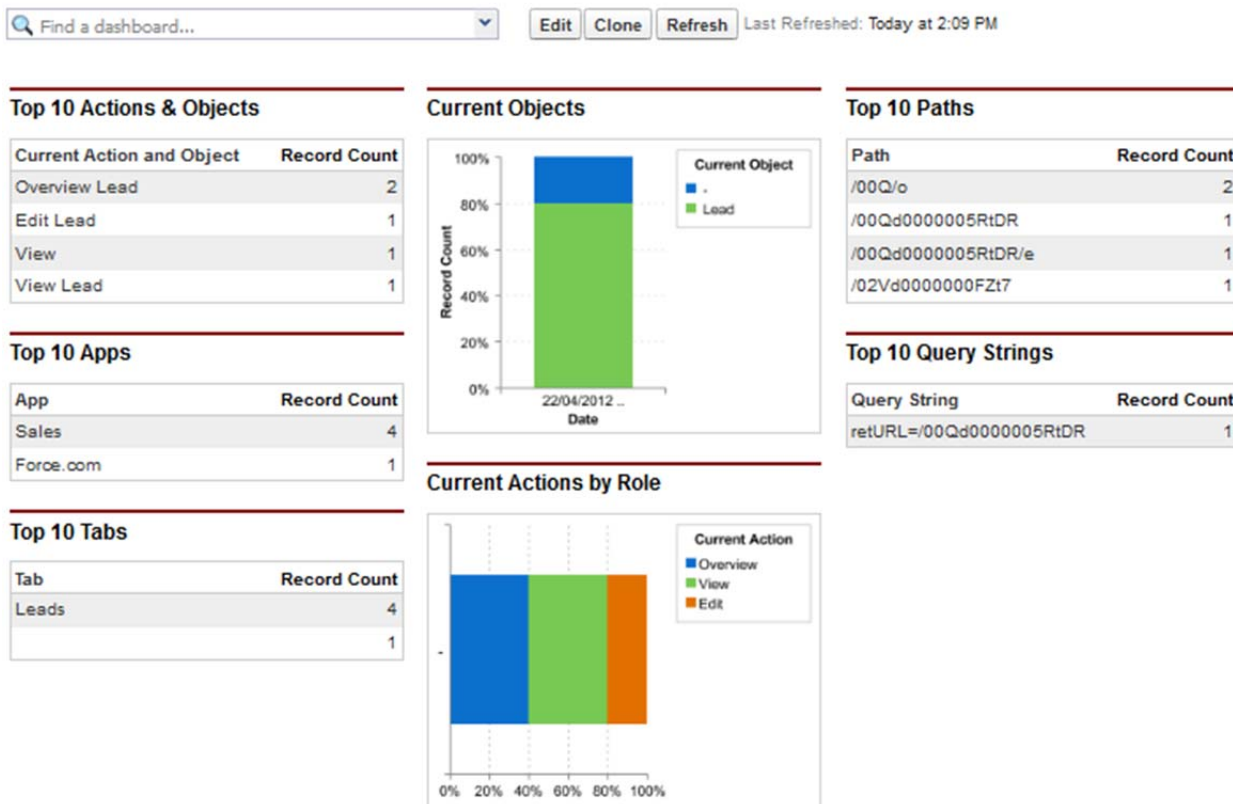
SALYTICS usage analytics

operations are within Salesforce.com such as viewing leads or editing opportunities. Additionally it attributes overall activity to the different Salesforce.com apps and tabs that are setup. This data is broken up by the operation (overview, view, edit, etc.) and the object (lead, contact, opportunity, etc.)

4. SALYTICS user analytics – User Reports

- User reports starts to look at how activity differs based on user criteria, such as country, role, profile, etc. Also, reports show inactive users by the time they spend using Salesforce.com and the top users by how much time they work within Salesforce.com. These reports are a great starting place to dig into user adoption data that only SALYTICS usage analytics provides.

SALYTICS user analytics - Content Reports



Support

For any questions or help in deploying SALYTICS usage analytics, please contact support at:

support@salytics.com
(877) 628 5628 x2