



TouchAnalytics

DASHBOARDS MADE SIMPLE

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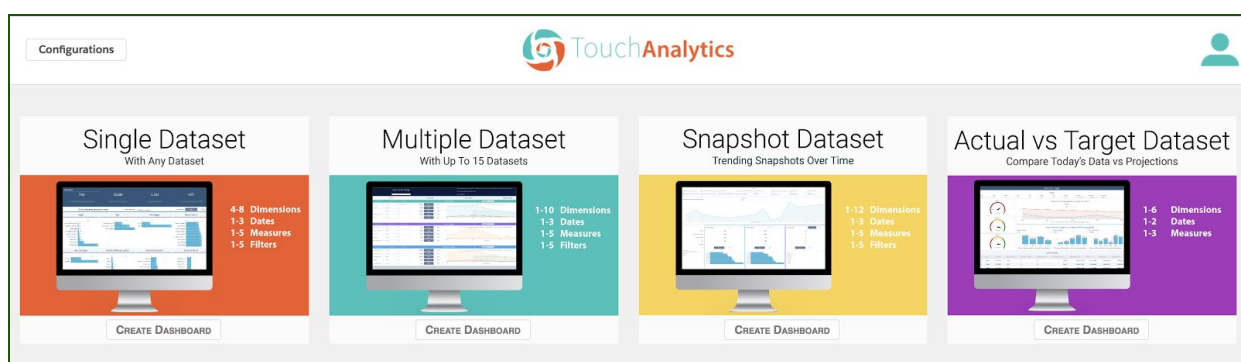
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APPLICATION OVERVIEW

TouchAnalytics is a turn-key application that simplifies and accelerates the creation of Dashboards for **Salesforce Analytics Studio™** enabling businesses to instantly leverage data within the **Analytics Cloud™** platform to make strategic decisions.

Templates

Currently, **TouchAnalytics** provides four templates to choose from: *Single Dataset*, *Multi Dataset*, *Snapshot Dataset* and *Actual vs Target Dataset*.



Single Dataset - This template provides the ability to quickly create a simple, yet powerful, Dashboard that visually displays the data from a single dataset.

[Click here to jump to section](#)

Multi Dataset - With this template users have the ability to quickly create one Overview Dashboard and up to three Drill In Dashboards based on data from up to 15 datasets.

[Click here to jump to section](#)

Snapshot - This template enables users to quickly create a Snapshot Dashboard which shows trending-over-time using multiple snapshot dates from your data.

[Click here to jump to section.](#)

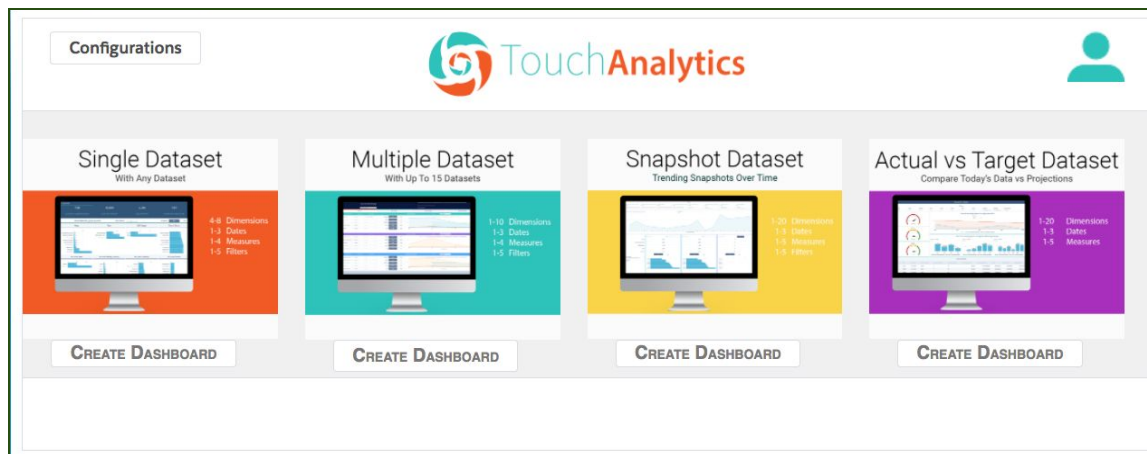
Actual vs Target - This template provides the ability to quickly create a simple Dashboard that shows target attainment from two datasets.

[Click here to jump to section.](#)

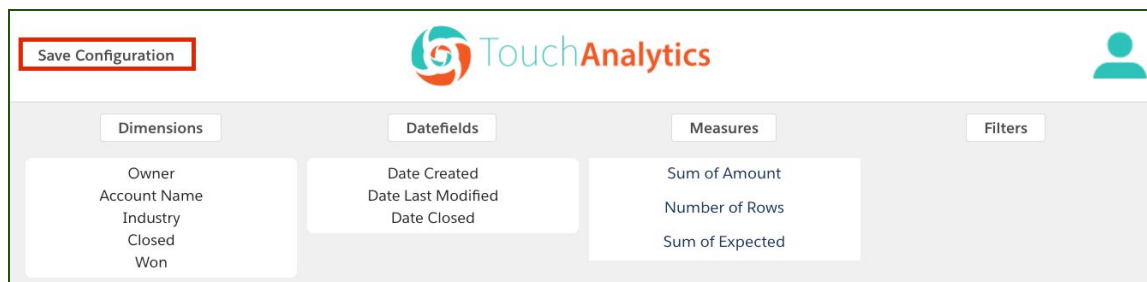
Configurations

First-Time Users

To configure a Dashboard using **TouchAnalytics**, click on the “Create Dashboard” button beneath the appropriate template name to select the Dashboard you want to create. The template you choose will determine the number of Dimensions, Datefields, Measures and Filters available during the configuration process. The application will guide you as you select the parameters you want to use in your Dashboard.



Once all of your parameters have been selected, click “Save Configuration” in the top-left corner to store this configuration for future use.



★ **NOTE** - If you proceed to create a Dashboard without saving the configuration, you may need to rebuild the configuration if you decide to re-use it.

Give the configuration a name and click “Submit” to save the it.

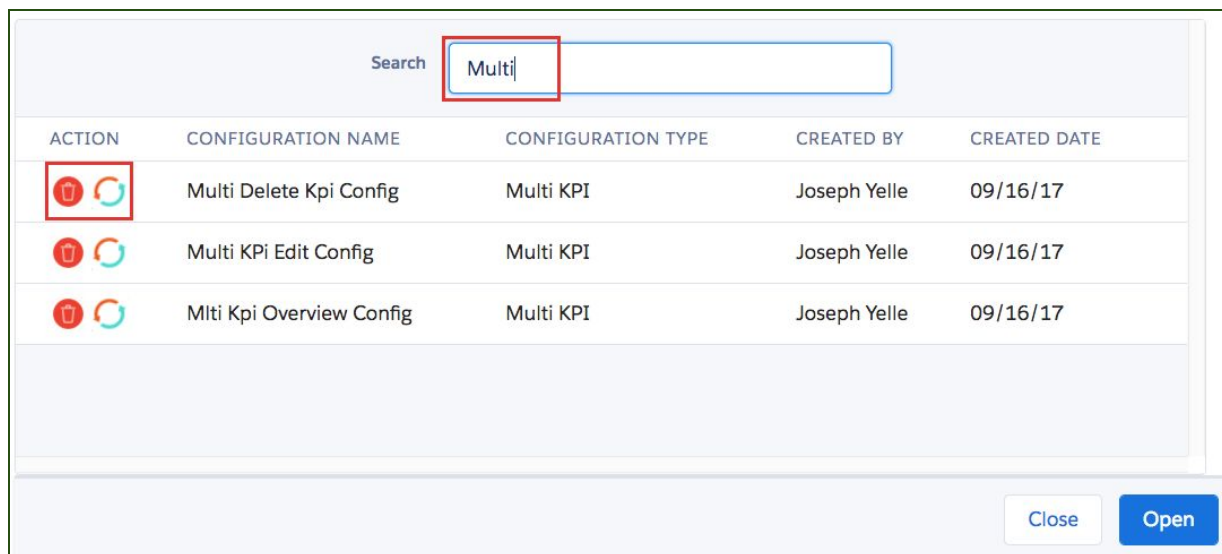
The screenshot shows the 'Add Configuration' form. It has a 'Configuration Name' field with the text 'Totals by Owner' entered. Below the field are 'Cancel' and 'Submit' buttons. The 'Submit' button is highlighted with a red box.

Returning Users

If you are returning to **TouchAnalytics** after having previously created a configuration, click on the "Configurations" button to see a list of saved configurations.



To search for a configuration type all or part of the name to narrow the list. You may click the "Delete" icon  to remove a previous configuration or click on the "Clone" icon  to use your stored configuration to create a new Dashboard.



No matter where you are in the application, you can get back to the list of Configurations by clicking on the **TouchAnalytics** logo  in the center of the interface. This will take you to the Home page. From here click on the "Configurations" button to view and edit your saved settings.



DEFINITIONS

KPI

Key Performance Indicators (KPIs) are the quantifiable Measures used to evaluate the success of an organization.

Template

A Template is a predetermined format for a Dashboard. It contains lists of the Dimensions, Datefields, Measures and Filters available for each Dataset.

Dataset

A Dataset is a body of data from *Analytics Studio™* containing Dimensions, Datefields and Measures.

Dimension

A Dimension is a field from a dataset which contains the information that will be used to construct your Dashboard.

Datefield

A Datefield is a field from a dataset that contains dates such as "Close Date", "Created Date" and "Last Modified". Selecting one or more Datefield allows for the creation of Dashboards which measure KPI performance within a specific timeframe.

Measure

A Measure can be applied to your Dashboard to calculate numerical data using mathematical operations such as "Sum", "Minimum value", "Maximum value", and "Average value". You can also use the "Count" function to calculate the number of rows in a Dimension.

Filter

A Filter can be chosen to apply logical conditions that isolate the portions of data you want to analyze allowing you to see the information most related to your current KPIs.

SINGLE DATASET

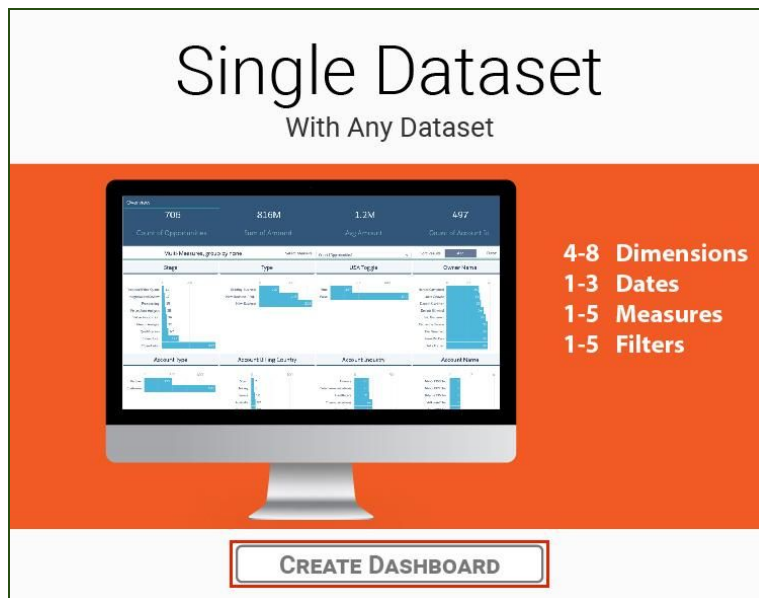
The Single Dataset template provides the ability to quickly create a simple, yet powerful, Dashboard that visually displays the data from a single dataset.

Use Cases

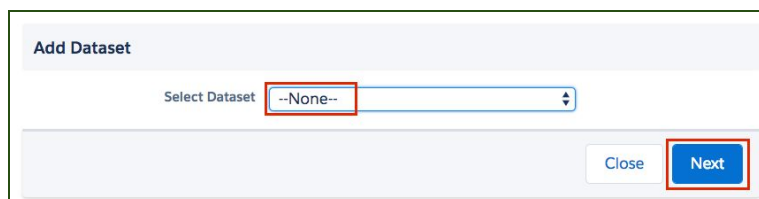
The Single Dataset template is used to create insightful Dashboards from a single dataset within just a few minutes. Whether you are trying to explore your data for random insights or have specific questions about the data, this template will put you on the right track.

Initial Setup

1. To create a Single Dataset Dashboard, click on the "Create Dashboard" button at the bottom of the Single Dataset section of the interface.

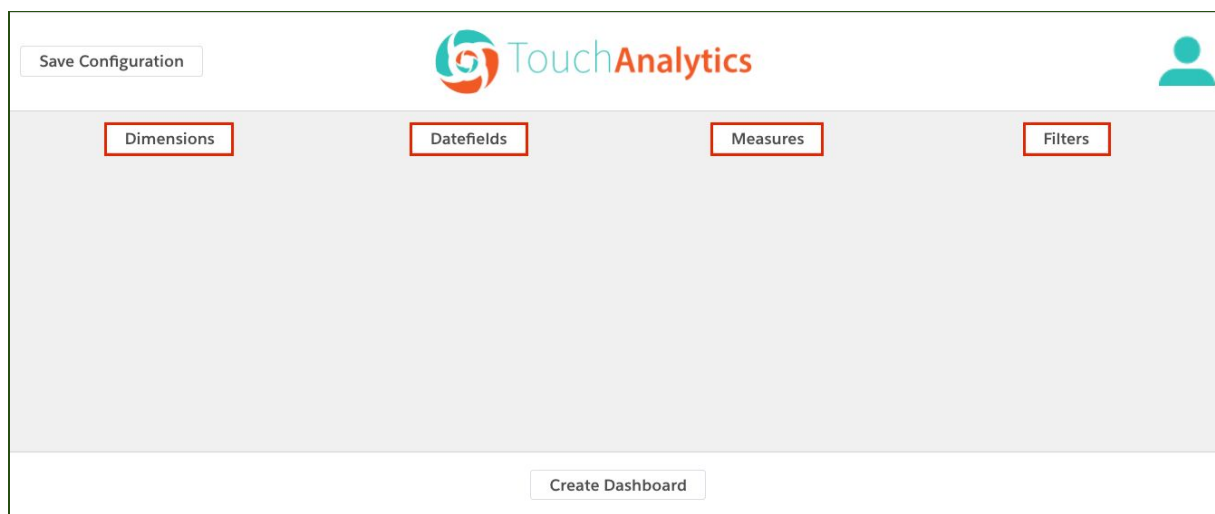


2. In the dialogue box that appears, select the dataset from *Analytics Studio™* that you want to use. Then, click "Next" to finish configuring your Single Dataset Dashboard.



Define Single Dataset Dashboard Attributes

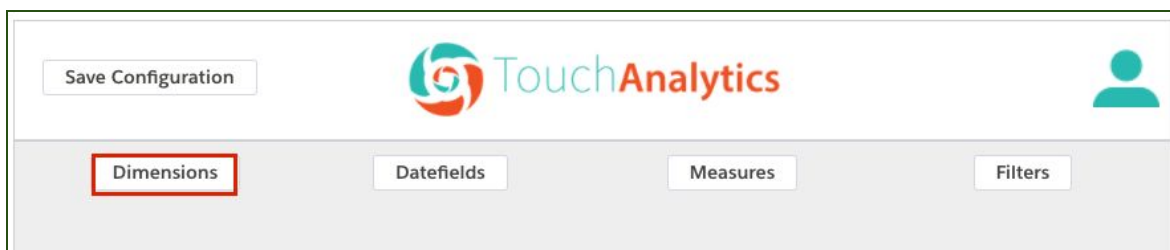
At this point you will select the Dimensions, Datefields, Measures and Filters needed to create your Single Dataset Dashboard for *Analytics Studio™*. The selections you make should be based upon the answers you want from your data about the Key Performance Indicators (KPIs) your organization uses to measure success.

The screenshot shows the TouchAnalytics dashboard configuration interface. At the top left is a "Save Configuration" button. In the center is the TouchAnalytics logo. At the top right is a user profile icon. Below these are four tabs: "Dimensions", "Datefields", "Measures", and "Filters", all of which are highlighted with red rectangular boxes. The main area below the tabs is a large, empty light gray rectangle. At the bottom center is a "Create Dashboard" button.

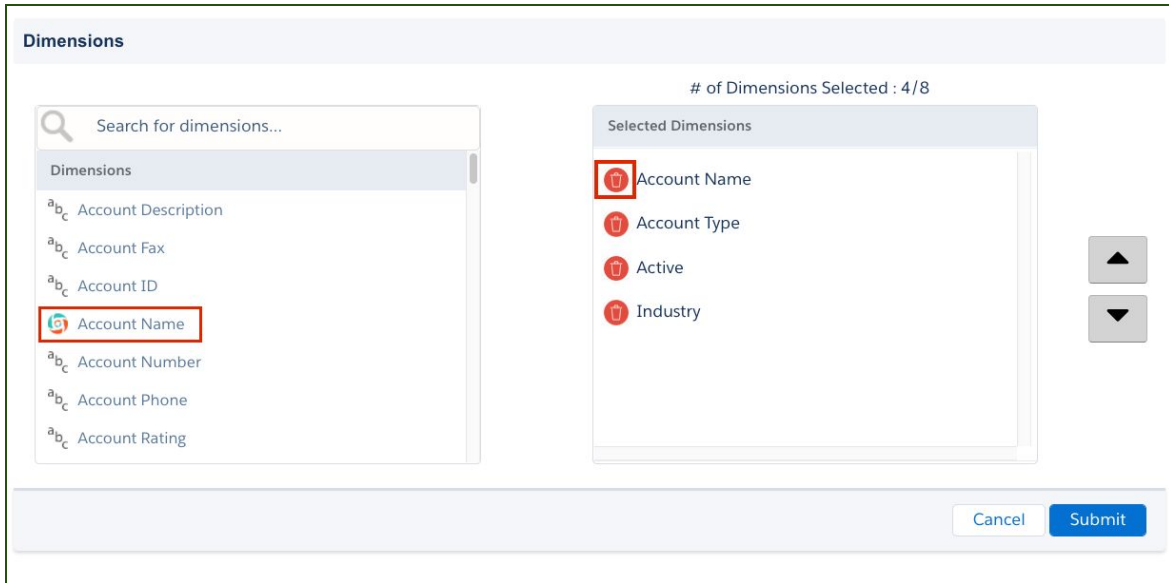
Dimensions

A Dimension is a field from a dataset which contains the information that will be used to construct your Dashboard. In the Single Dataset template you may choose between 1 and 8 Dimensions for your dashboard.

1. Click on "Dimensions" to select the data you want to see in the Dashboard to assess your KPIs.

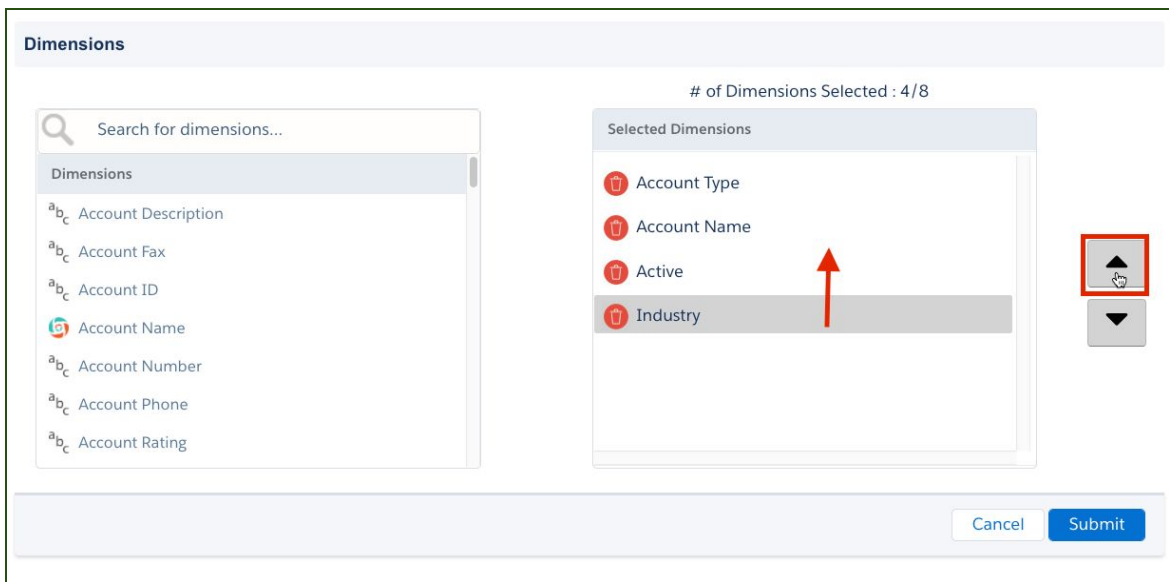
This screenshot is similar to the one above, showing the TouchAnalytics dashboard configuration interface. The "Save Configuration" button, logo, and user icon are at the top. The four tabs are "Dimensions", "Datefields", "Measures", and "Filters". In this view, the "Dimensions" tab is highlighted with a red rectangular box, while the other tabs are not. The main area below the tabs is a large, empty light gray rectangle. The "Create Dashboard" button is at the bottom center.

- To choose a Dimension, simply click on it in the column on the left to add it to the column on the right. You can remove Dimensions from the column on the right by simply clicking the red "Delete" icon  next to the unwanted Dimension name.



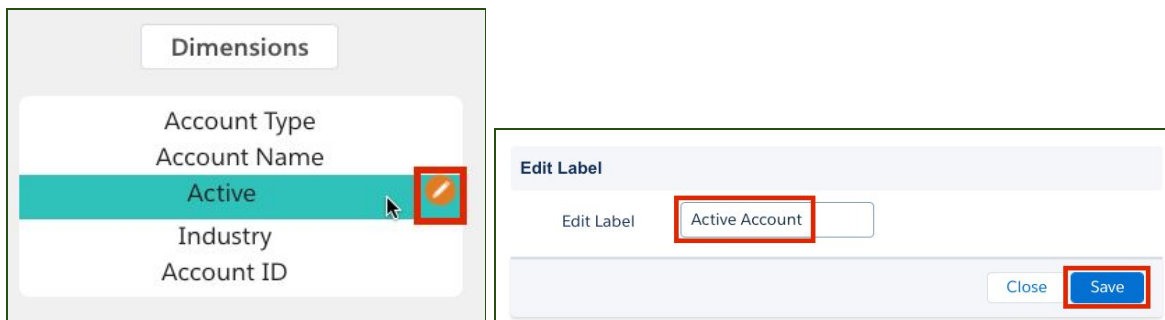
★ **NOTE** - You must select at least 1 but no more than 8 Dimensions with the Single Dataset template.

- Use the Up () and Down () arrows to place your Dimensions in a desired order. First, highlight the Dimension you want to move. Then, click on the Up () or Down () arrows to place the Dimension in the desired order.



- When all desired Dimensions are added and ordered, click "Submit" to finalize your selection of Dimensions.

- Click on the "Edit" icon  to modify the name of a Dimension. Type the desired label name in the dialogue box that appears.



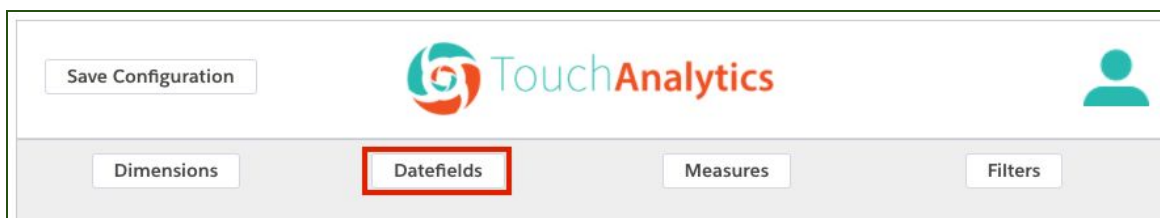
- Click "Save" to finalize the renaming of your Dimensions.



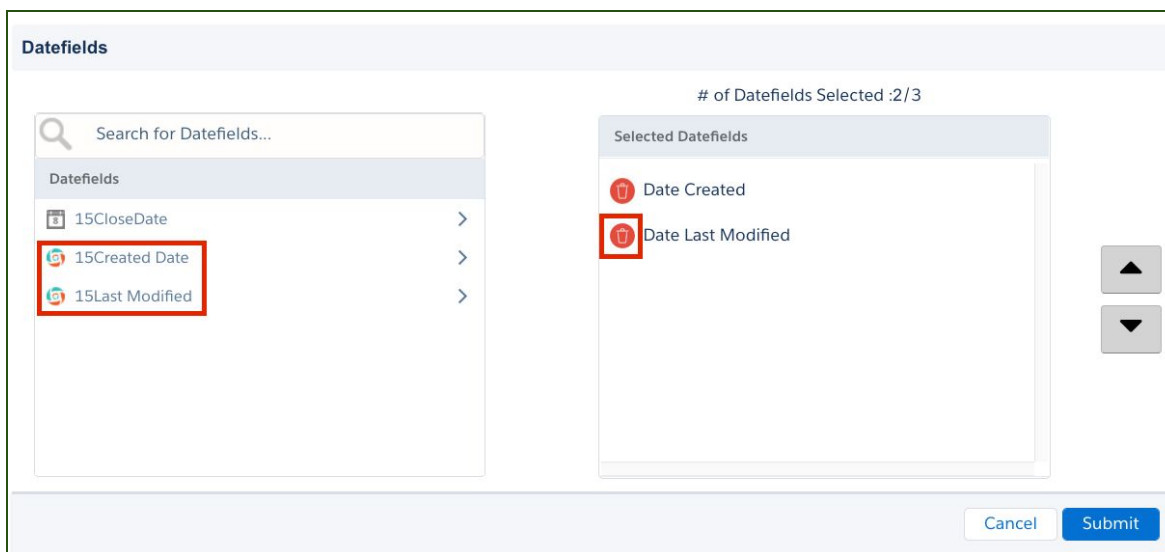
Datefields

A Datefield is a field from a dataset that contains dates such as "Close Date", "Created Date" and "Last Modified". Selecting one or more Datefield allows for the creation of Dashboards which measure KPI performance within a specific timeframe.

- Click on the "Datefields" button to view and select specific Datefields.

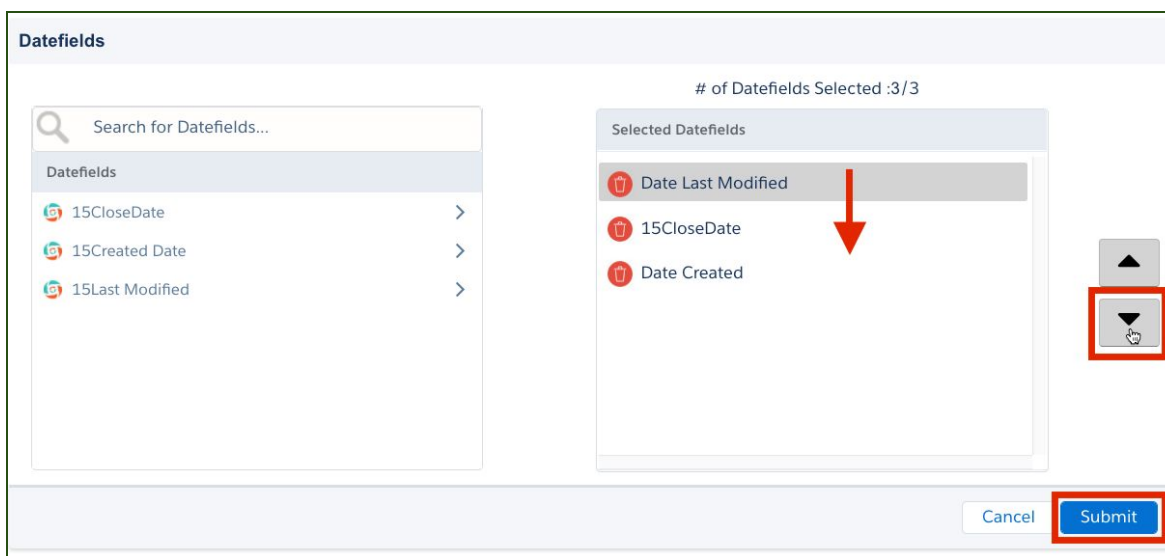


- To choose a Datefield, simply click on it in the column on the left to add it to the column on the right. You can remove Datefields from the column on the right by simply clicking on the red "Delete" icon  next to the unwanted Datefield name.



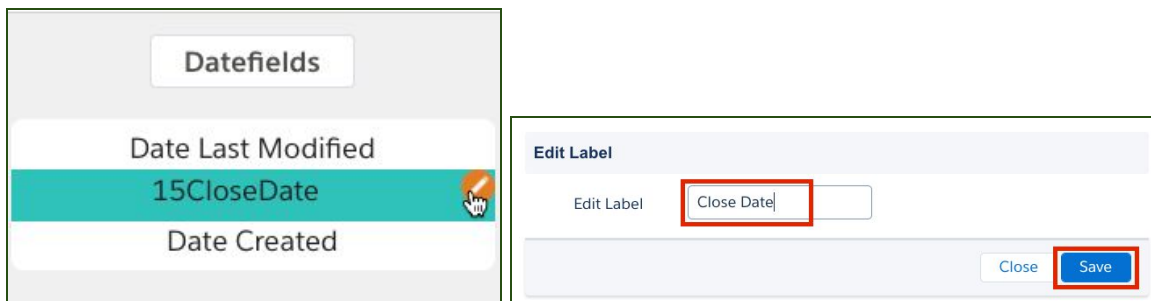
★ **NOTE** - You must select at least 1 but no more than 3 Datefields with the Single Dataset template.

- Use the Up (⤴) and Down (⤵) arrows to place your Datefields in a desired order. First, highlight the Datefield you want to move. Then, click on the Up (⤴) or Down (⤵) arrows to place the Datefield in the desired order.



- When all desired Datefields are added and ordered, click "Submit" to return to the main page of **TouchAnalytics**.

- Click on the "Edit" icon  to modify the name of a Datefield. Type the desired label name in the dialogue box that appears.



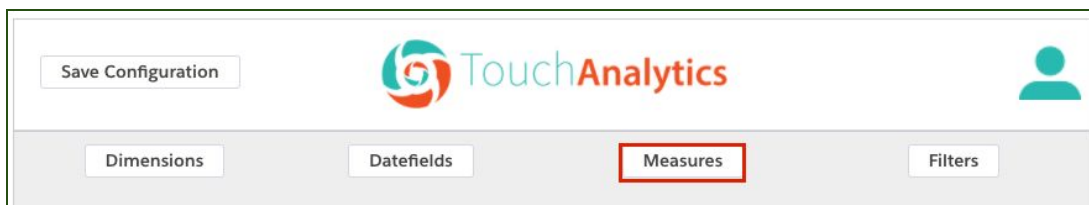
- Click "Save" to finalize the renaming of your Datefields.



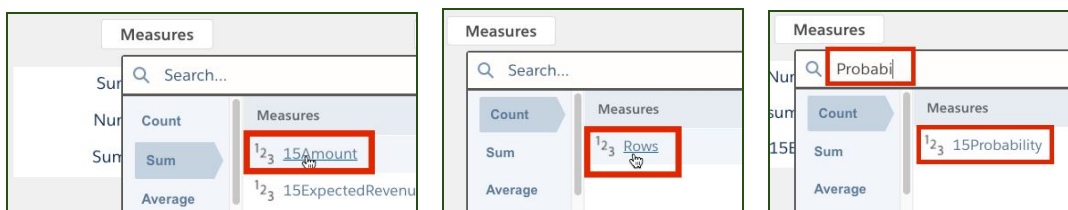
Measures

A Measure can be applied to your Dashboard to calculate numerical data using mathematical operations such as "Sum", "Minimum", "Maximum", and "Average". You can also use the "Count" function to calculate the number of rows in a Dimension.

- Click on the "Measures" button to view and select specific Measures.



- Click the desired mathematical operation that the Measure will be based on. Select the field name to create and add a Measure function. To search for a specific field name, type in the desired Measure.

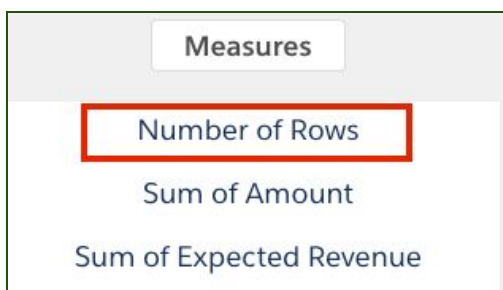


★ **NOTE** - A maximum of 5 Measures can be added in Single Dataset section.

- Click on the "Edit" icon  to modify the name of a Measure. Type the desired label name in the dialogue box that appears. Remove a Measure from your configuration by clicking on the "Delete" icon .



- Click "Save" to finalize the renaming of your Measures.

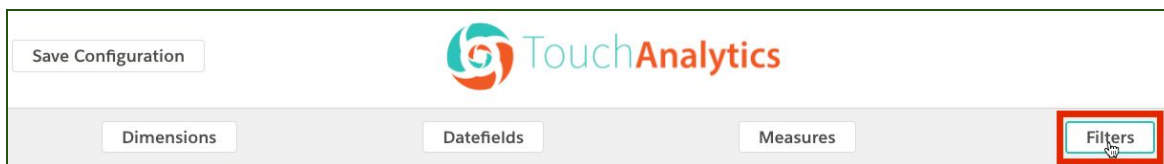


Filters

Filters help to define a subset of the data based on one or more selected conditions.

★ **NOTE** - Filter specification is optional; it is not necessary to create a Filter to generate a Dashboard.

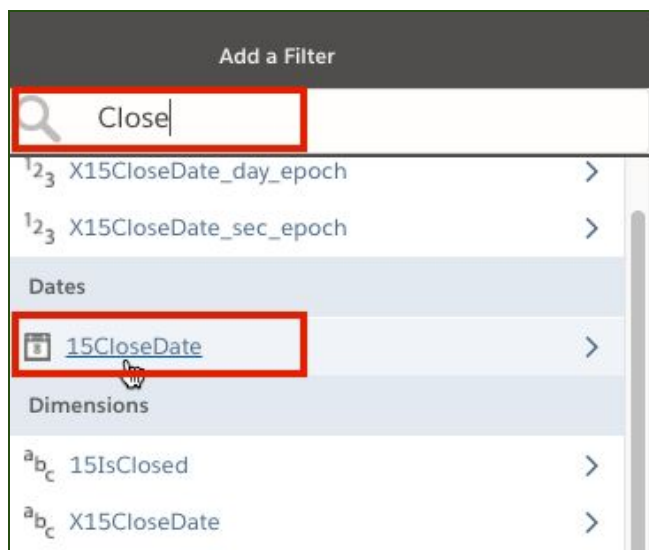
- Click on the "Filters" button to view and select specific Filter.



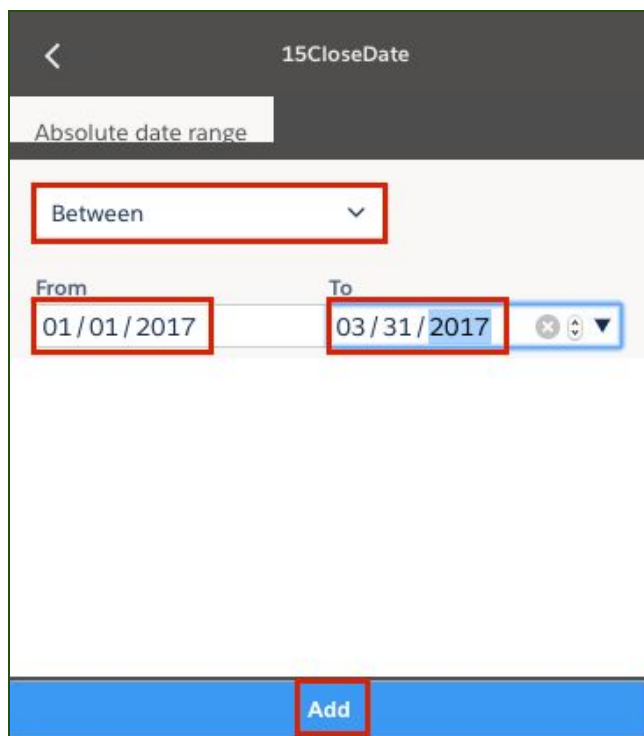
- Provide a name for this Filter in the "Filter Name" box in the upper left corner of the dialogue box. Then click the "+" button to select your Filter criteria.



3. You can filter the data by Measures, Dates or Dimensions. Search for and select each field you want to use.



4. After selecting a field, you will be asked to define which portion of this data field you want to see. Next, you will choose from conditions such as "Between", "Greater Than" and "Less Than". Finally, depending on the field your filtering with and the conditions you are applying you may need to set the filter values. Then, click "Add".



5. Upon clicking the “Add” button, a Filter Function for your Dashboard will be created. Each Filter can have several Filter Functions. To add additional Filter Functions, click on the “+” button and repeat steps 3 and 4.

★ **NOTE** - Be sure to verify and/or edit the Filter Logic located in the bottom left box.

6. Click "Add Filter" to return to the main page of [TouchAnalytics](#).
7. You may add up to five Filters by repeating Steps 1-5. You may also rename or remove Filters by clicking on one of the “Edit”  or “Delete”  icons next to the Filter name.

★ **NOTE** - Verify the Filter Logic of each Filter before clicking on the “Create Dashboard” button. Errors in Filter Logic can prevent the creation of your Dashboard.

Create Dashboard

1. The "Create Dashboard" button will generate a Dashboard in *Analytics Studio™* based on all given specifications chosen in **TouchAnalytics**.

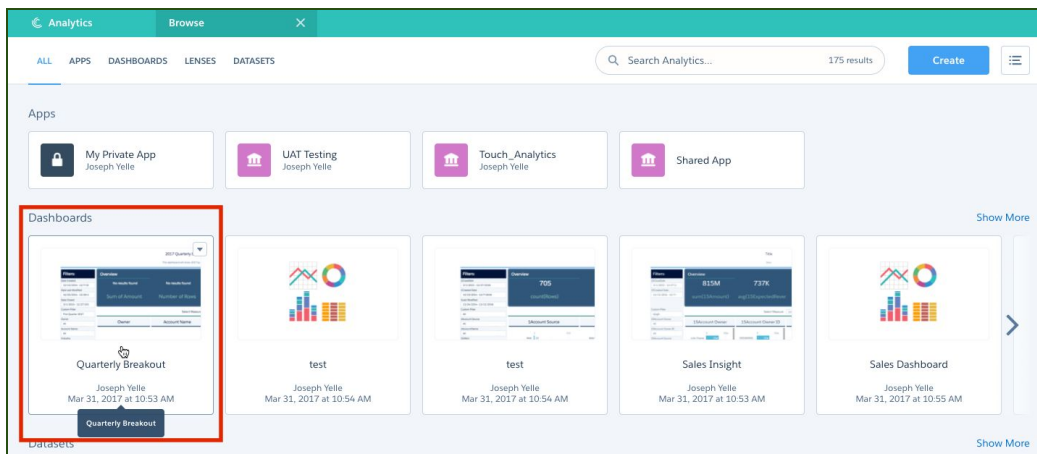


2. Provide a Dashboard Name, Title and Description. Choose the app to indicate where to store the Dashboard and click "Submit" to finalize the creation of the Dashboard.

3. To return to the *Analytics Studio™* to view the newly created Dashboard click the "Click here to go to Analytics Studio Wave" link at the top of the interface.



4. Your Dashboard will be listed in the newly created Dashboards section and within the app where you chose to store it in step 2 above.



MULTI DATASET

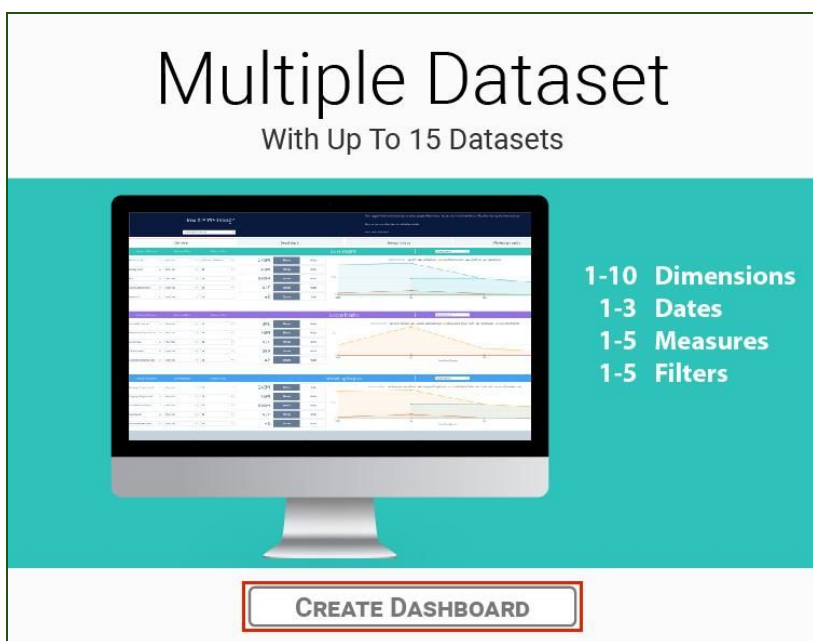
The Multi Dataset template gives users the ability to quickly create one Overview Dashboard and up to three Drill In Dashboards based on data from up to 15 datasets.

Use Cases

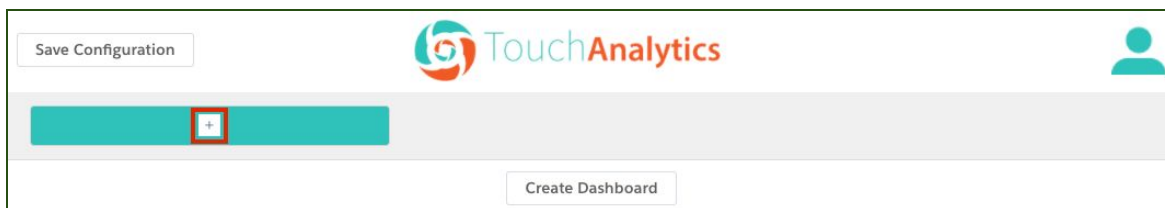
The Multi Dataset template is most often used to create Dashboards that provide collaborative and comparative views of data from various datasets.

Initial Setup

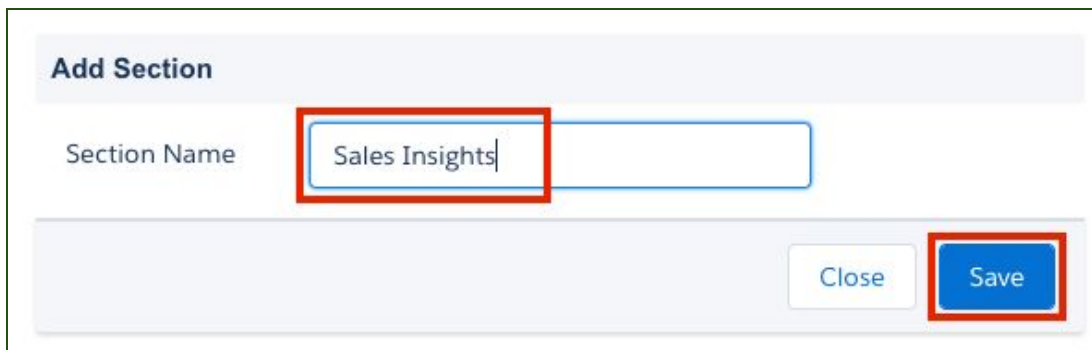
1. To create a Multi Dataset Dashboard, click on the "Create Dashboard" button at the bottom of the Multi Dataset section of the interface.



2. In this step of creating the Multi Dataset Dashboard you will form the sections to analyze your data. To create a section, click the "+" button.

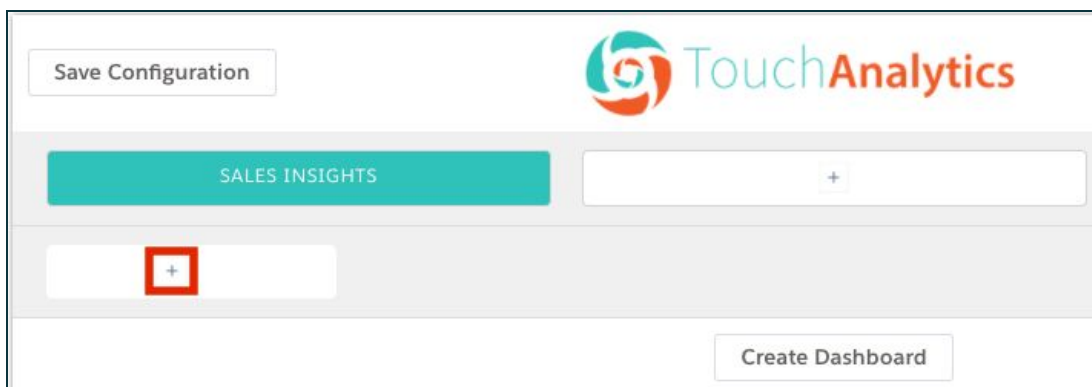


3. Provide a section name (e.g. "Sales Insights") in the dialogue box, then click on the "Save" button.



The screenshot shows a dialog box titled "Add Section". It has a text input field labeled "Section Name" containing the text "Sales Insights". To the right of the input field are two buttons: "Close" and "Save". The "Save" button is highlighted with a red rectangular box.

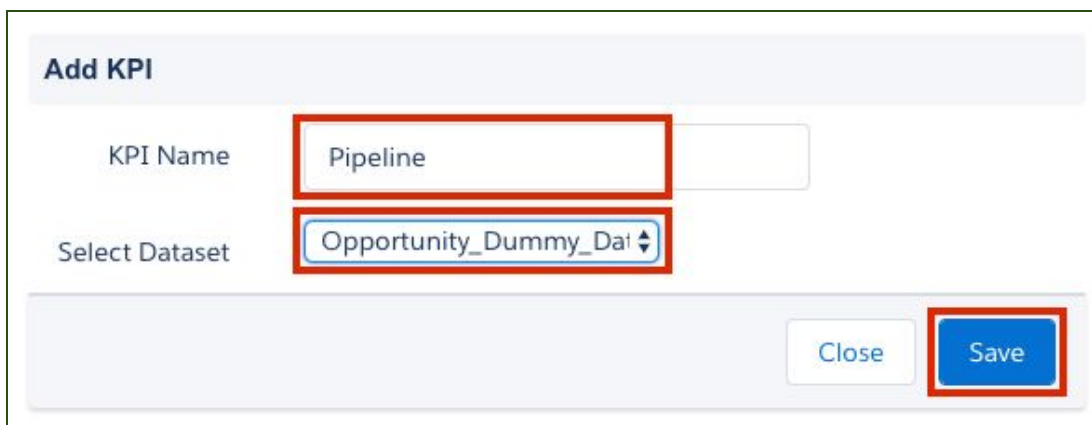
4. Click the "+" button beneath the section you just added to add a KPI to the section.



The screenshot shows the TouchAnalytics dashboard. At the top, there is a "Save Configuration" button and the TouchAnalytics logo. Below the logo, there is a teal button labeled "SALES INSIGHTS" and a white button with a "+" sign. Below these buttons, there is a red box highlighting a "+" button. At the bottom right, there is a "Create Dashboard" button.

★ **NOTE** - You may add up to five KPIs per Section.

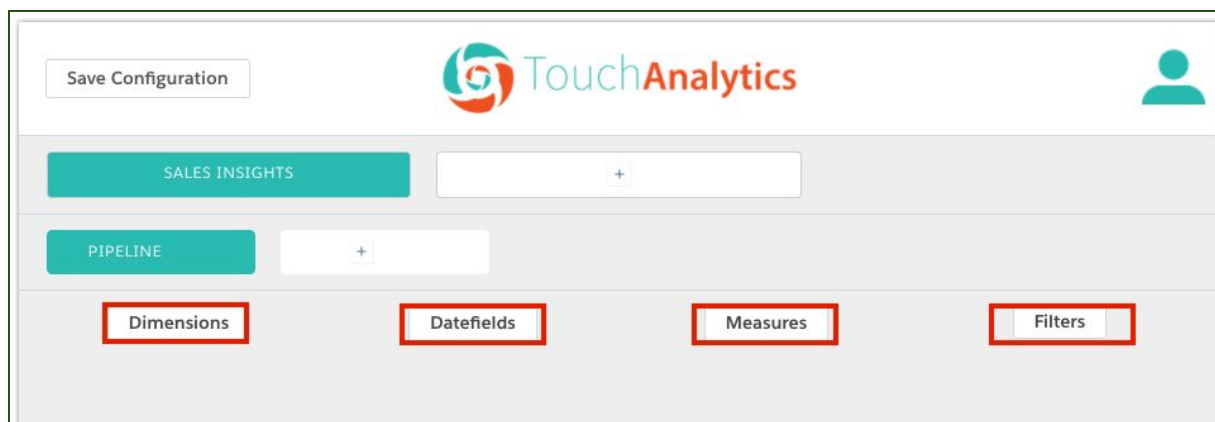
5. In the dialogue box that appears, provide a name for the KPI (e.g. "Pipeline"). Select the Dataset you want to use from the drop-down menu, then click "Save".



The screenshot shows a dialog box titled "Add KPI". It has two text input fields: "KPI Name" containing "Pipeline" and "Select Dataset" containing "Opportunity_Dummy_Dat". To the right of the input fields are two buttons: "Close" and "Save". The "Save" button is highlighted with a red rectangular box.

Define Multi Dataset Dashboard Attributes

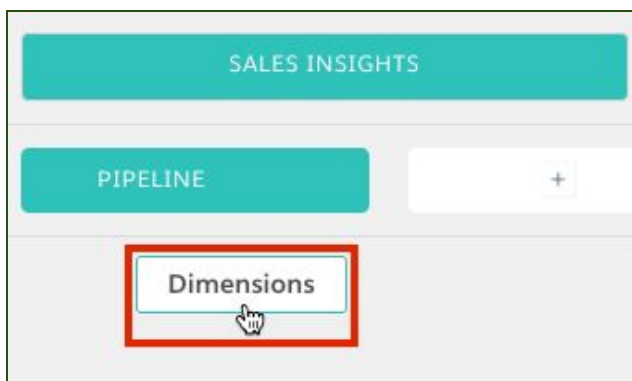
At this point you will select the Dimensions, Datefields, Measures and Filters needed for each KPI to create your Multi Dataset Dashboard for *Analytics Studio™*. The selections you make should be based upon the answers you want from your data about the Key Performance Indicators (KPIs) your organization looks at to measure success.



Dimensions

A Dimension is a field from a dataset which contains the information that will be used to construct your Dashboard. In the Multi Dataset template you may choose between 1 and 10 Dimensions for each KPI you add in each Section.

1. Click on "Dimensions" to select the data you want to see in the Dashboard to assess your KPIs.



- To choose a Dimension, simply search for or scroll to and click on a Dimension in the column on the left to add it to the column on the right.

The screenshot shows the 'Dimensions' selection interface. On the left, there is a search bar with 'Account' entered. Below it, a list of dimensions is shown: '15Account Owner', '15Account Owner ID', '15Account Source', '15AccountId', and '15AccountName'. The '15AccountName' dimension is highlighted with a red box. On the right, the 'Selected Dimensions' list contains '15Account Owner'. Above this list, it says '# of Dimensions Selected : 1/10'. At the bottom right, there are 'Cancel' and 'Submit' buttons.

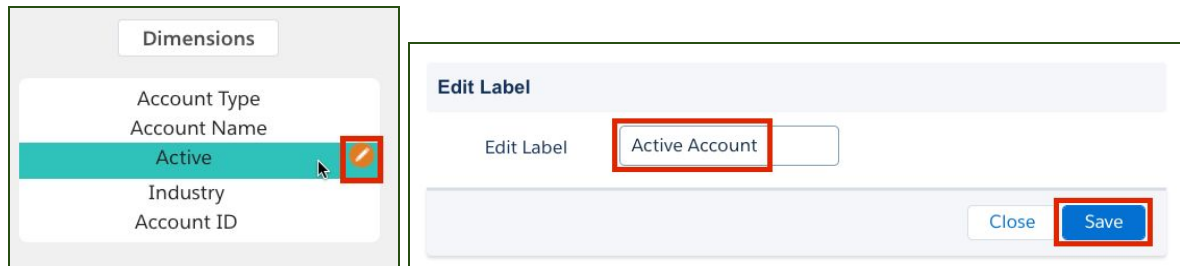
★ **NOTE** - You must select at least 1 but no more than 10 Dimensions with the Multi Dataset template.

- Use the Up (⤴) and Down (⤵) arrows to place your Dimensions in a desired order. First, highlight the Dimension you want to move. Then, click on the Up (⤴) or Down (⤵) arrows to place the Dimension in the desired order.

The screenshot shows the 'Dimensions' selection interface with 6 dimensions selected. On the left, the search bar is empty. The list of dimensions includes '15Account Owner', '15Account Owner ID', '15Account Source', '15AccountId', '15AccountName', '15Category', and '15HasOpenActivity'. On the right, the 'Selected Dimensions' list contains '15Account Owner', '15HasOpenActivity', '15HasOverdueTask', '15IsWon', '15Industry', and '15Manager'. The '15Account Owner' dimension is highlighted with a red box. To the right of the list, there are up and down arrows, with the up arrow highlighted by a red box. At the bottom right, there are 'Cancel' and 'Submit' buttons, with the 'Submit' button highlighted by a red box.

- To remove an unwanted dimension, simply click on the "Delete" icon (🗑️) to the left of the Dimension name.
- When all desired Dimensions are added and ordered, click "Submit".

- Click on the "Edit" icon  to modify the name of a Dimension. Type the desired label name in the dialogue box that appears.



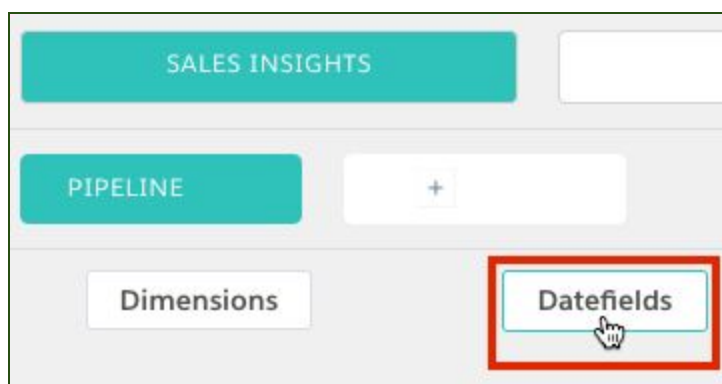
- Click "Save" to finalize the renaming of your Dimensions.



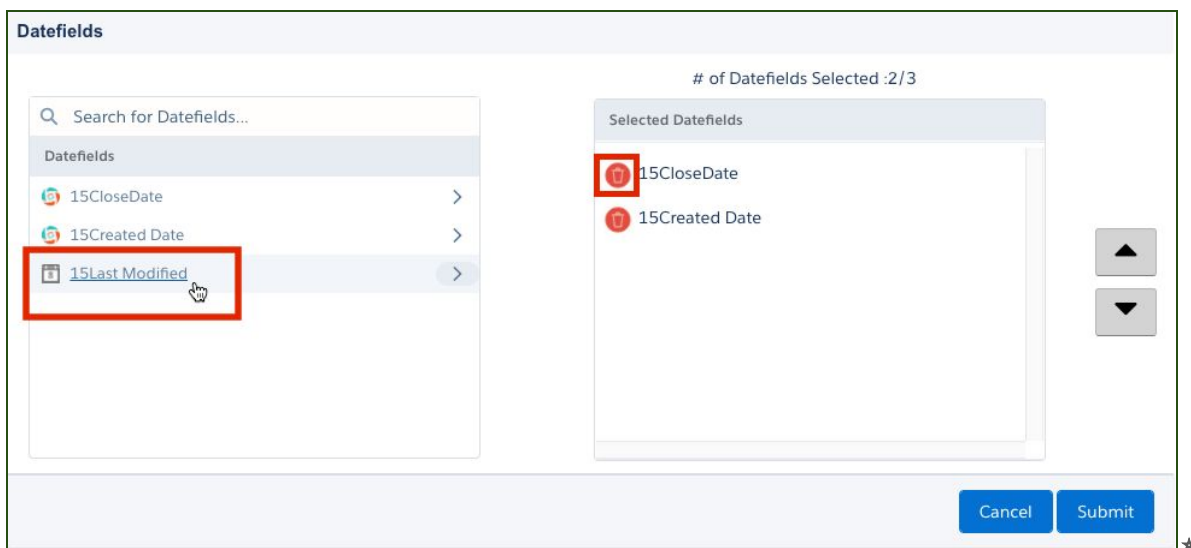
Datefields

A Datefield is a field from a dataset that contains dates such as "Close Date", "Created Date" and "Last Modified". Selecting one or more Datefield allows for the creation of Dashboards which measure KPI performance within a specific timeframe. In the Multi Dataset template you may choose between 1 and 3 Datefields for each KPI you add in each Section.

- Click on the "Datefields" button to view and select specific Datefields.



- To choose a Datefield, simply click on it in the column on the left to add it to the column on the right. You can remove Datefields from the column on the right by simply clicking on the red "Delete" icon  next to the unwanted Datefield name.



Datefields

Search for Datefields...

Datefields

- 15CloseDate
- 15Created Date
- 15Last Modified**

of Datefields Selected :2/3

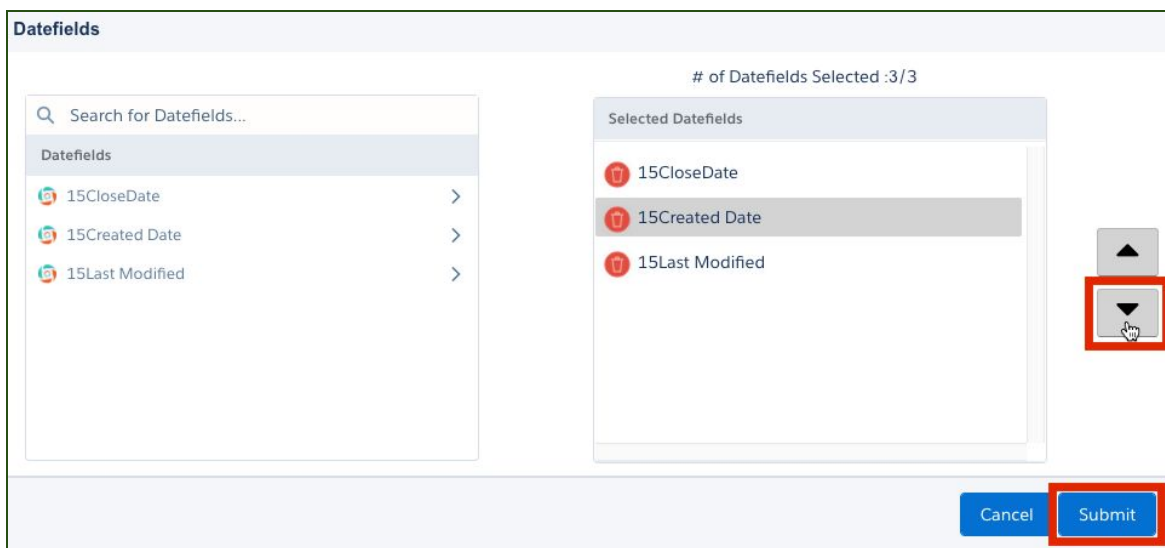
Selected Datefields

-  15CloseDate
-  15Created Date

Cancel Submit

NOTE - You must select at least 1 but no more than 3 Datefields with the Multi Dataset template.★

- Use the Up (⤴) and Down (⤵) arrows to place your Datefields in a desired order. First, highlight the Datefield you want to move. Then, click on the Up (⤴) or Down (⤵) arrows to place the Datefield in the desired order.



Datefields

Search for Datefields...

Datefields

- 15CloseDate
- 15Created Date
- 15Last Modified

of Datefields Selected :3/3

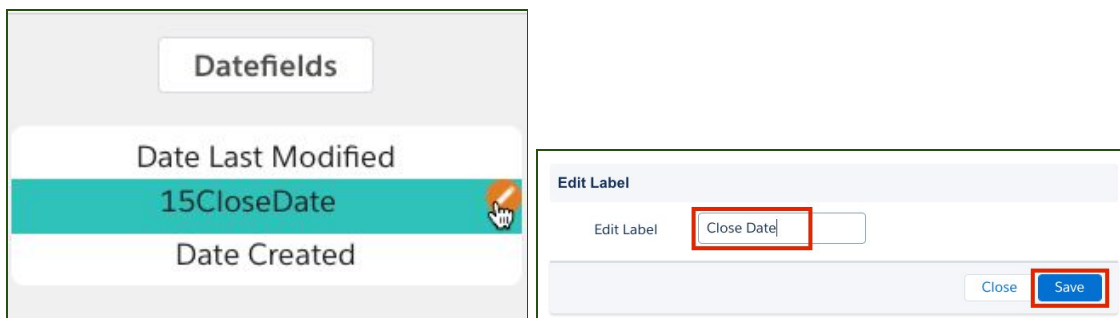
Selected Datefields

-  15CloseDate
- 15Created Date**
-  15Last Modified

Cancel Submit

- When all desired Datefields are added and ordered, click "Submit" to return to the main page of **TouchAnalytics**.

- Click on the "Edit" icon  to modify the name of a Datefield. Type the desired label name in the dialogue box that appears.



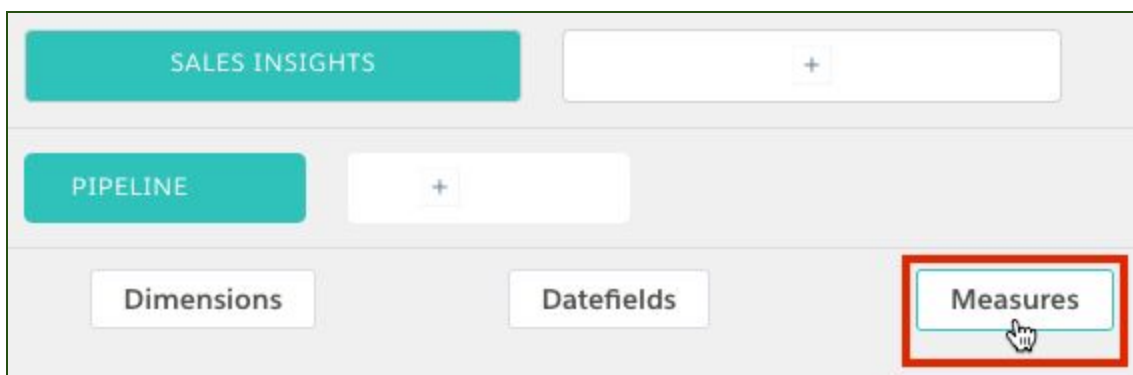
- Click "Save" to finalize the renaming of your Datefields.



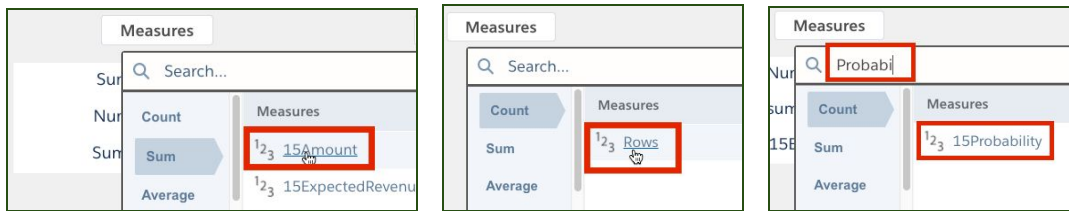
Measures

A Measure can be applied to your Dashboard to calculate numerical data using mathematical operations such as "Sum", "Minimum value", "Maximum value", and "Average value". You can also use the "Count" function to calculate the number of rows in a Dimension. In the Multi Dataset template you may choose between 1 and 5 Datefields for each KPI you add in each Section.

- Click on the "Measures" button to view and select specific Measures.

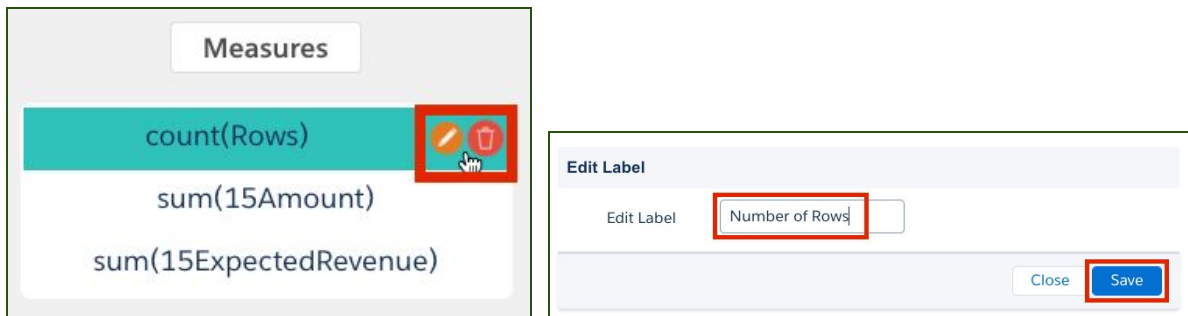


- Click the desired mathematical operation that the Measure will be based on. Select the field name to create and add a Measure function. To search for a specific field name, type in the desired Measure.

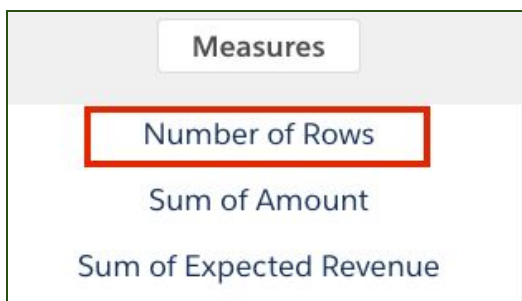


★ **NOTE** - A maximum of 5 Measures can be added for each KPI in the Multi Dataset template.

- Click on the "Edit" icon (pencil) to modify the name of a Measure. Type the desired label name in the dialogue box that appears. Remove a Measure from your configuration by clicking on the "Delete" icon (trash can).



- Click "Save" to finalize the renaming of your Measures.



Filters

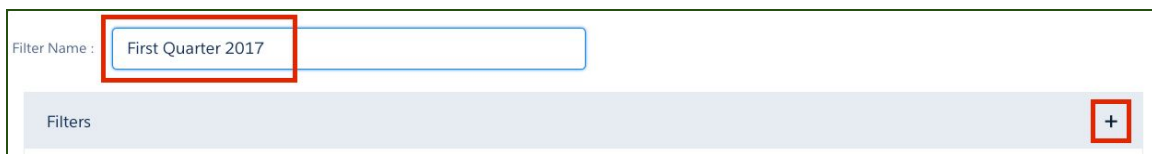
Filters help to define a subset of the data based on one or more selected conditions. In the Multi Dataset template you may choose up to five Filters for each KPI you add in each Section.

★ **NOTE** - Filter specification is optional; it is not necessary to create a Filter to generate a Dashboard.

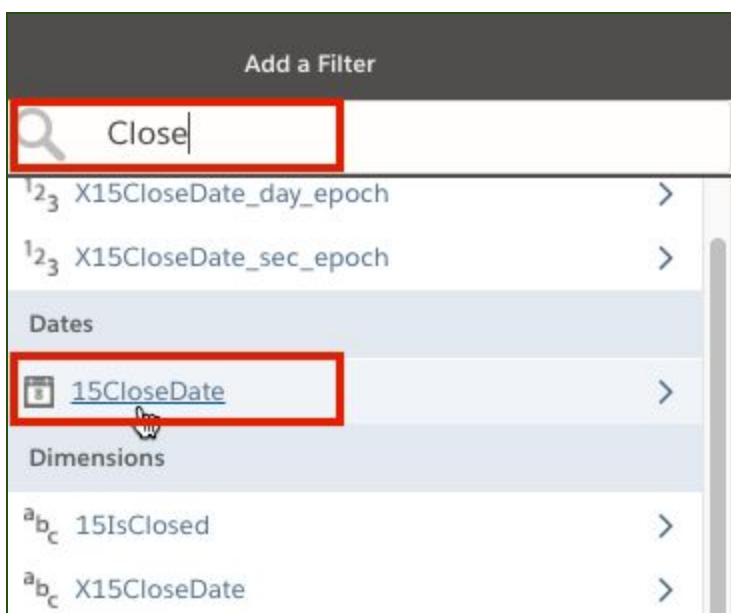
1. Click on the "Filters" button to view and select specific Filter.



2. Enter a name for your Filter in the "Filter Name" box in the upper left corner of the dialogue box. Then click the "+" button to select your Filter criteria.



3. You can filter the data by Measures, Dates or Dimensions. Search for and select each field you want to use.



- After selecting a field, you will be asked to define which portion of this data field you want to see. Next, you will choose from conditions such as "Between", "Greater Than" and "Less Than". Finally, depending on the field your filtering with and the conditions you are applying you may need to set the filter values. Then, click "Add".

The screenshot shows a mobile application interface for configuring a filter. At the top, there is a back arrow and the text '15CloseDate'. Below this is a section titled 'Absolute date range'. A dropdown menu is set to 'Between'. Underneath, there are two date pickers: 'From' with the value '01/01/2017' and 'To' with the value '03/31/2017'. At the bottom of the screen is a large blue button labeled 'Add'.

- Upon clicking the "Add" button, the Filter function for your Dashboard will be created. Each Filter can have several Filter functions. To add additional Filter functions, click on the "+" button and repeat steps 3 and 4.

The screenshot shows a mobile application interface for configuring a filter. At the top, there is a text input field for 'Filter Name' with the value 'First Quarter 2017'. Below this is a section titled 'Filters' with a '+' button in the top right corner. The 'Filters' section contains a list of three filters: (1) 15CloseDate 30/03/217 - 31/12/2016, (2) 15Amount 100000 - 8577295, and (3) 15Industry:Banking. At the bottom, there is a 'Filter Logic' section with a text input field showing '1 AND 2 AND 3' and an 'Add Filter' button. There is also a 'Close' button next to it.

★ **NOTE** - Be sure to verify and/or edit the Filter Logic located in the bottom left box.

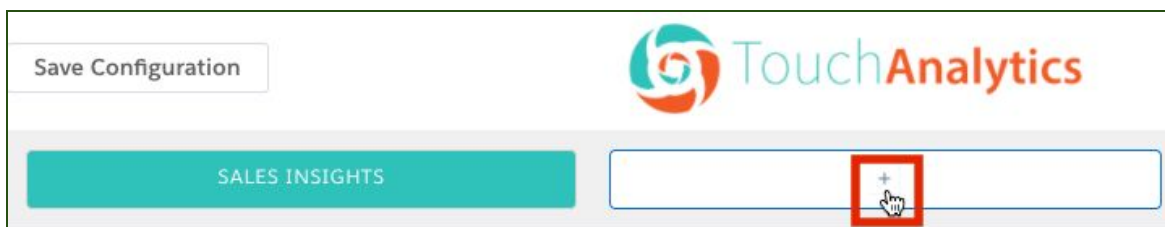
6. Click “Submit” to return to the main page of **TouchAnalytics**.
7. You may add up to five Filters by repeating Steps 1-5.

★ **NOTE** - Verify the Filter Logic of each Filter before clicking on the “Create Dashboard” button. Errors in Filter Logic can prevent the creation of your Dashboard.

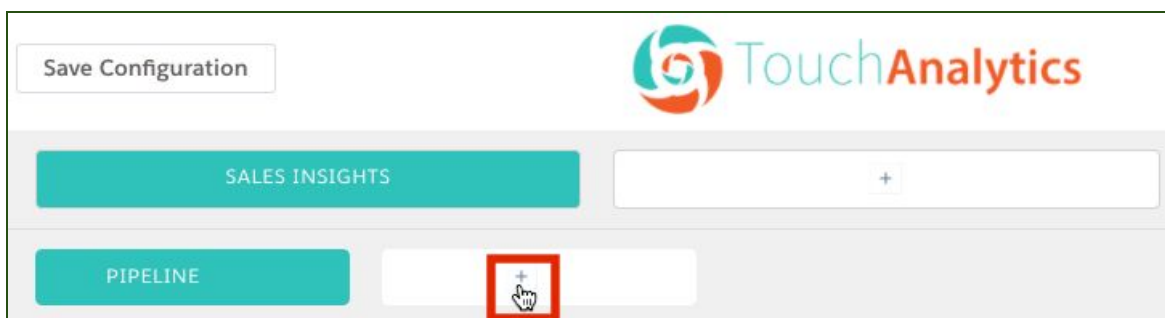
More Sections and KPIs

The Multi Dataset template allows you to create up to three Sections and up to five KPIs for each Section. After setting up the first KPI you will want to set up additional Sections and KPIs for this Dashboard.

1. To create a new Section, click on the “+” button next to your existing Section. After naming the Section you will need to create KPIs (up to five) for this Section.

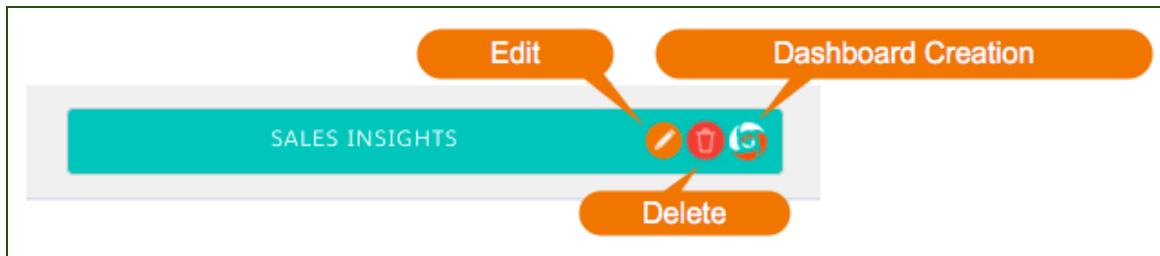


2. To create a new KPI in the current section, click on the “+” button next to your existing KPI. After naming the KPI and selecting the dataset you will need to select the “Dimensions”, “Datefields”, “Measures” and “Filters” for the new KPI.



Create Drill In Dashboards

1. After creating the different sections, you will see three clickable icons. The function of each is illustrated below.

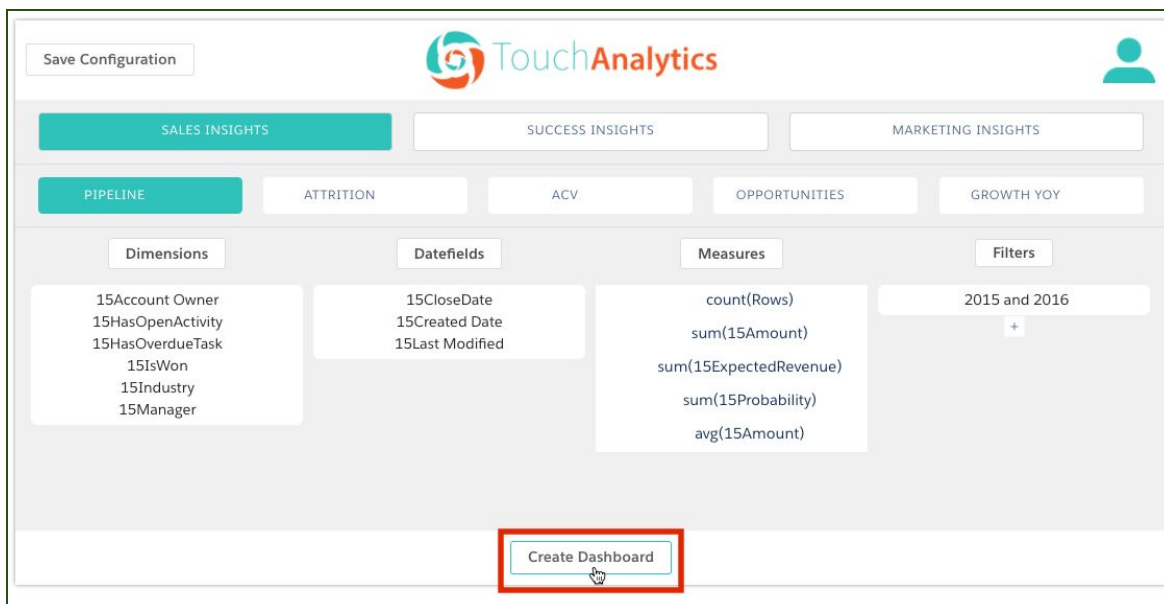


- a. The "Edit" icon  will allow you to review and change the Section properties.
- b. To remove a section click on the "Delete" icon .
- c. Click on the "Dashboard Creation" icon  to create the Dashboard for that particular Section.

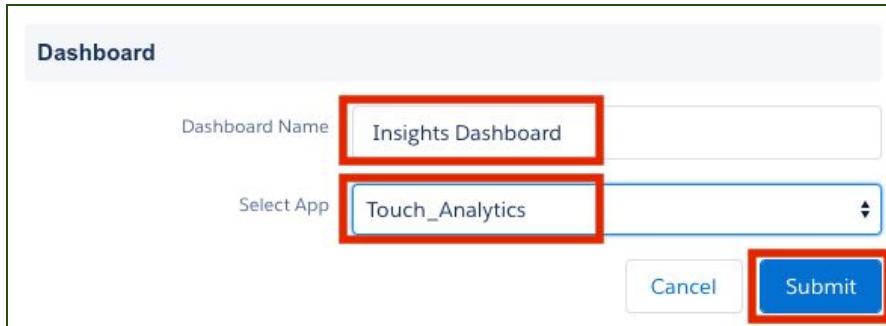
Create Overview Dashboard

After all of your sections have been created and edited you will click on the "Create Overview Dashboard" button to create the collaborative Dashboard for the 3 sections.

1. Click on "Create Overview Dashboard" at the bottom center of the interface.



2. A dialogue box will appear asking you to provide a "Dashboard Name" and to select which app the Dashboard will be created in by choosing a value from the "Select App" drop-down. Click on the "Submit" button to finalize the creation of your Overview Dashboard. Creation should be verified by a success message.



The screenshot shows a dialog box titled "Dashboard". It contains two input fields: "Dashboard Name" with the text "Insights Dashboard" and "Select App" with the text "Touch_Analytics". Both fields are highlighted with red rectangles. Below the fields are two buttons: "Cancel" and "Submit", with the "Submit" button also highlighted by a red rectangle.

3. To return to the *Analytics Studio™* to view the newly created Dashboard click the "Click here to go to Analytics Studio Wave" link at the top of the interface.



4. Your Dashboard will be listed in the newly created Dashboards section and within the folder/app where you chose to store it in step 2 above.

SNAPSHOT

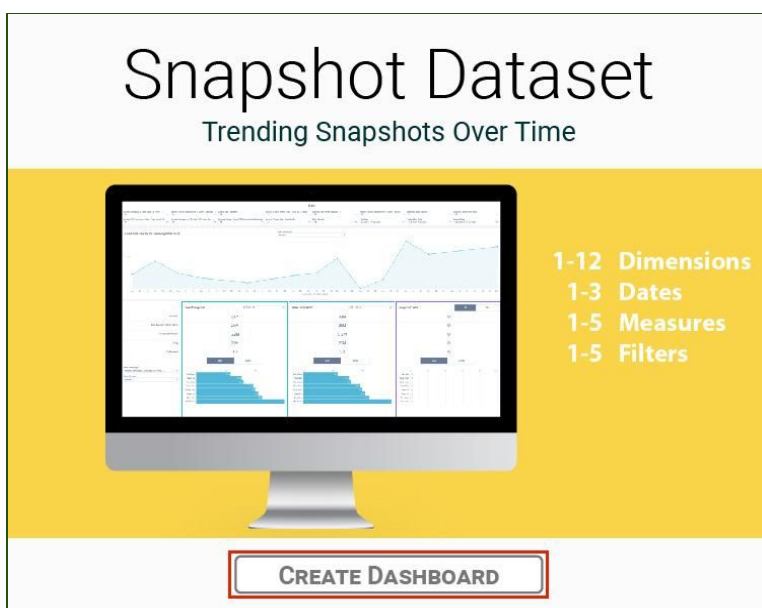
The Snapshot template enables users to quickly create a Snapshot Dashboard which shows trending-over-time using multiple snapshot dates from your data.

Use Cases

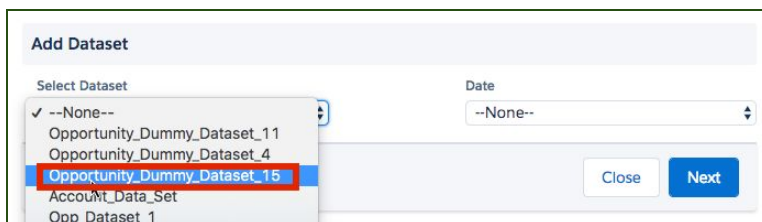
The Snapshot template is used to create one trending-over-time Dashboard based on a snapshot dataset. With this template you can define how your pipeline is changing over time and determine the average time of an opportunity in each stage.

Initial Setup

1. To create a Snapshot Dashboard, click on the “Create Dashboard” button at the bottom of the Snapshot section of the interface.



2. In the dialogue box that appears, select the dataset from Analytics Studio™ that you want to use. Then, click “Next” to finish configuring your Snapshot Dashboard.



- Once a dataset has been selected, choose the date value with which you want to create the Snapshot.

- After selecting the dataset and the date value, click “Next” to continue configuring your Snapshot Dashboard.

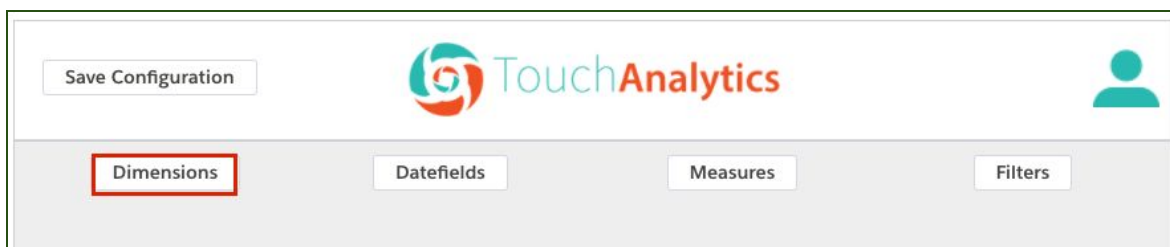
Define Snapshot Dashboard Attributes

At this point you will select the Dimensions, Datefields, Measures and Filters needed to create your Snapshot Dashboard for *Analytics Studio™*. The selections you make should be based upon the answers you want from your data about the Key Performance Indicators (KPIs) your organization looks at to measure success.

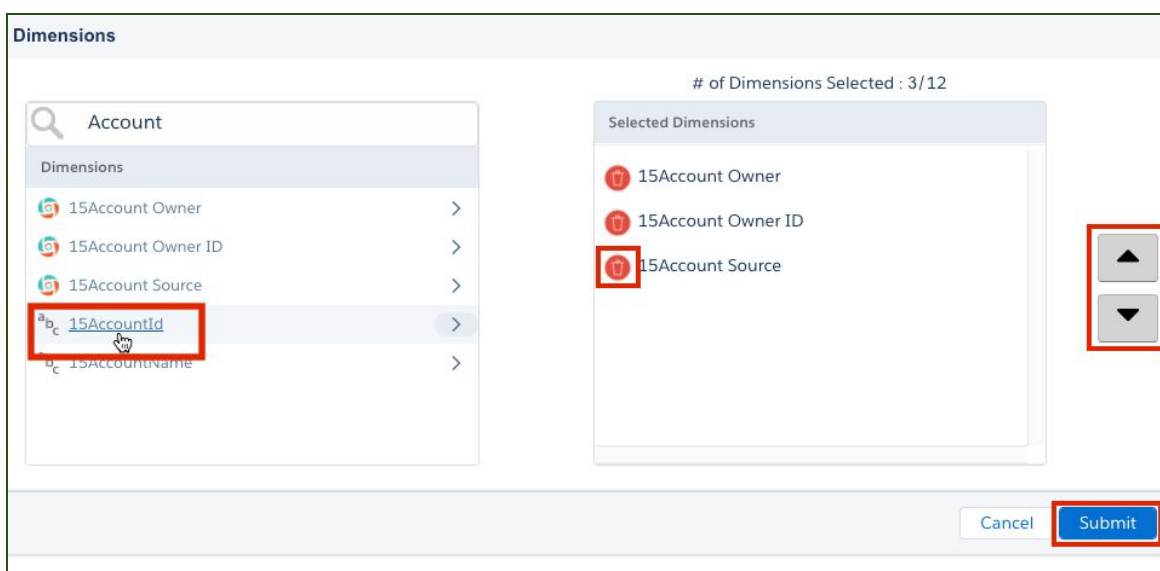
Dimensions

A Dimension is a field from a dataset which contains the information that will be used to construct your Dashboard. In the Snapshot Dataset template you may choose between 1 and 12 Dimensions for your dashboard.

1. Click on "Dimensions" to select the data you want to see in the Dashboard to assess your KPIs.



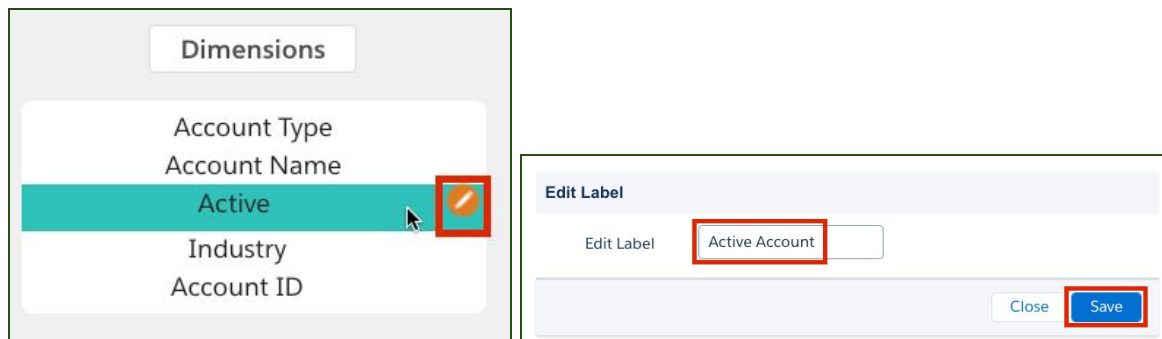
2. To choose a Dimension, simply click on it in the column on the left to add it to the column on the right. You can remove Dimensions from the column on the right by simply clicking on the red "Delete" icon (🗑️) next to the unwanted Dimension name.



★ **NOTE** - You must select at least 1 but no more than 12 Dimensions with the Snapshot template.

3. Use the Up (⤴) and Down (⤵) arrows to place your Dimensions in a desired order. First, highlight the Dimension you want to move. Then, click on the Up (⤴) or Down (⤵) arrows to place the Dimension in the desired order.
4. When all desired Dimensions are added and ordered, click "Submit".

- Click on the "Edit" icon  to modify the name of a Dimension. Type the desired label name in the dialogue box that appears.



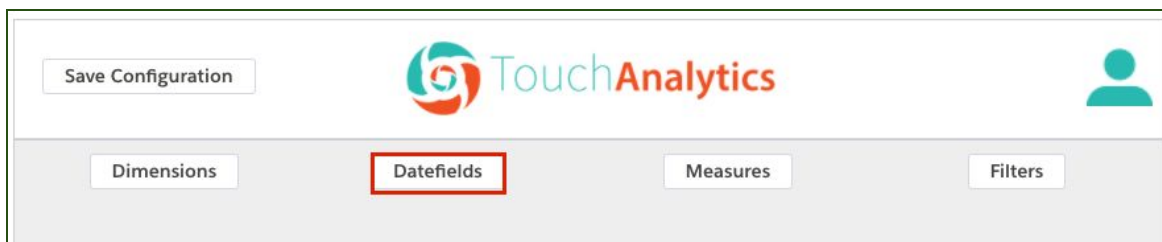
- Click "Save" to finalize the renaming of your Dimensions.



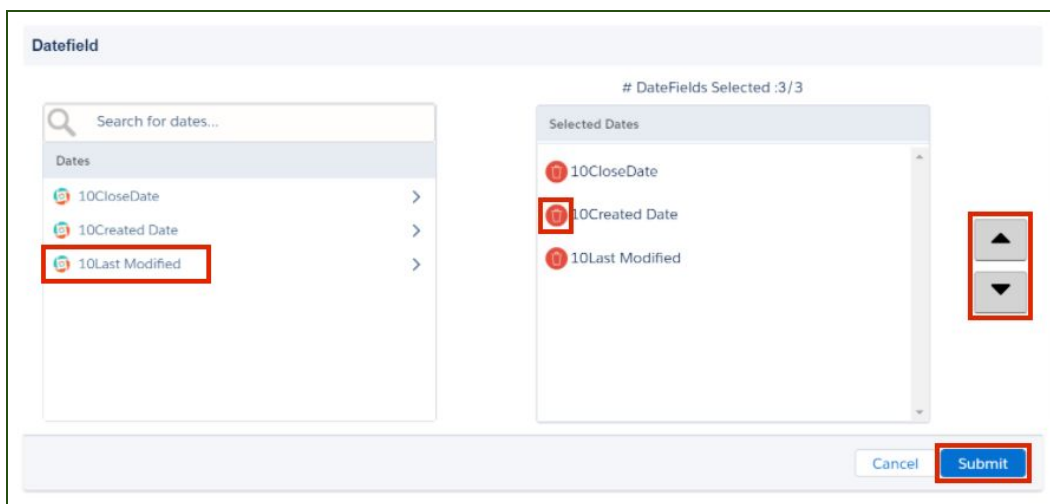
Datefields

A Datefield is a field from a dataset that contains dates such as "Close Date", "Created Date" and "Last Modified". Selecting one or more Datefield allows for the creation of Dashboards which measure KPI performance within a specific timeframe.

- Click on the "Datefields" button to view and select specific Datefields.

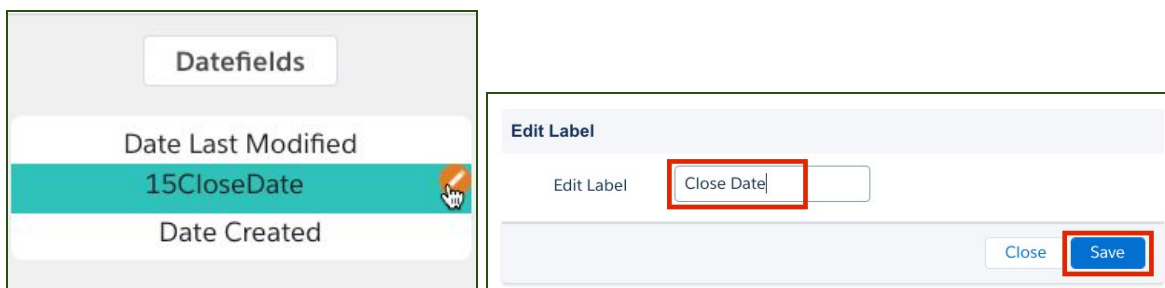


- To choose a Datefield, simply click on it in the column on the left to add it to the column on the right. You can remove Datefields from the column on the right by simply clicking on the red "Delete" icon  next to the unwanted Datefield name.



★ **NOTE** - You must select at least 1 but no more than 3 Datefields with the Snapshot template.

- Use the Up (⤴) and Down (⤵) arrows to place your Datefields in a desired order. First, highlight the Datefield you want to move. Then, click on the Up (⤴) or Down (⤵) arrows to place the Datefield in the desired order.
- When all desired Datefields are added and ordered, click "Submit" to return to the main page of **TouchAnalytics**.
- Click on the "Edit" icon  to modify the name of a Datefield. Type the desired label name in the dialogue box that appears.



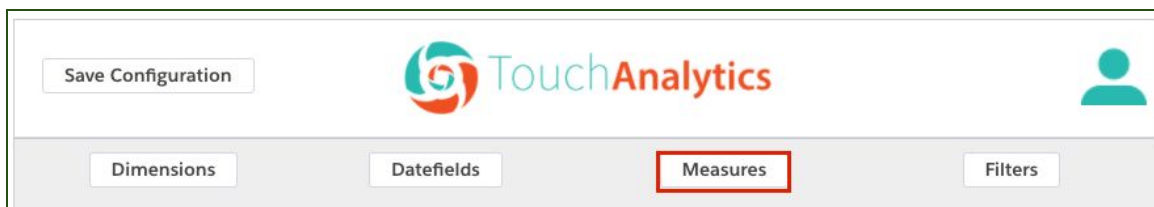
- Click "Save" to finalize the renaming of your Datefields.



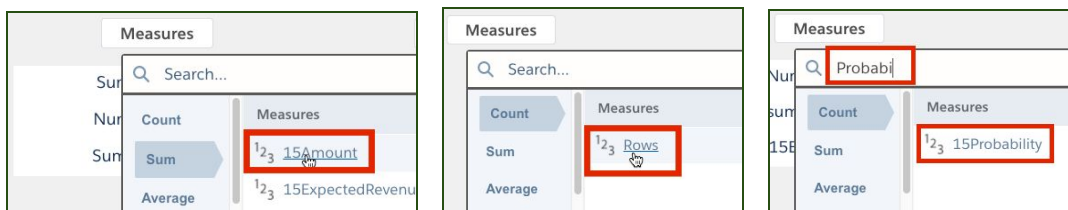
Measures

A Measure can be applied to your Dashboard to calculate numerical data using mathematical operations such as "Sum", "Minimum value", "Maximum value", and "Average value". You can also use the "Count" function to calculate the number of rows in a Dimension.

1. Click on the "Measures" button to view and select specific Measures.

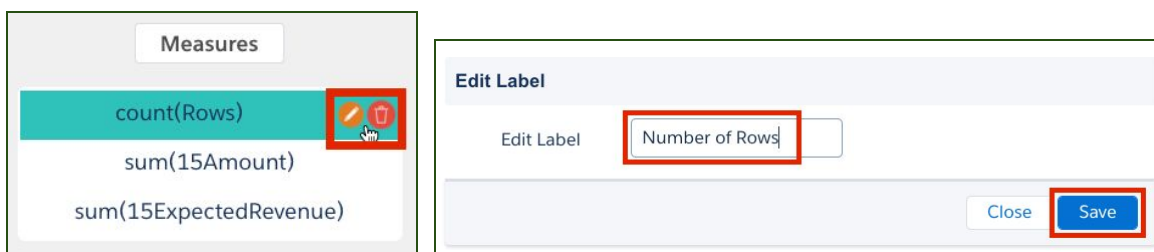


2. Click the desired mathematical operation that the Measure will be based on. Select the field name to create and add a Measure function. To search for a specific field name, type in the desired Measure.

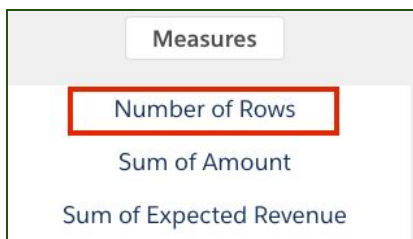


★ **NOTE** - A maximum of 5 Measures can be added in Snapshot section.

3. Click on the "Edit" icon (pencil) to modify the name of a Measure. Type the desired label name in the dialogue box that appears. Remove a Measure from your configuration by clicking on the "Delete" icon (trash). .



4. Click "Save" to finalize the renaming of your Measures.

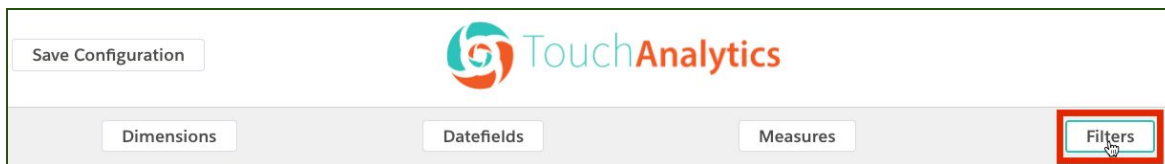


Filters

Filters help to define a subset of the data based on one or more selected conditions.

★ NOTE - Filter specification is optional; it is not necessary to create a Filter to generate a Dashboard.

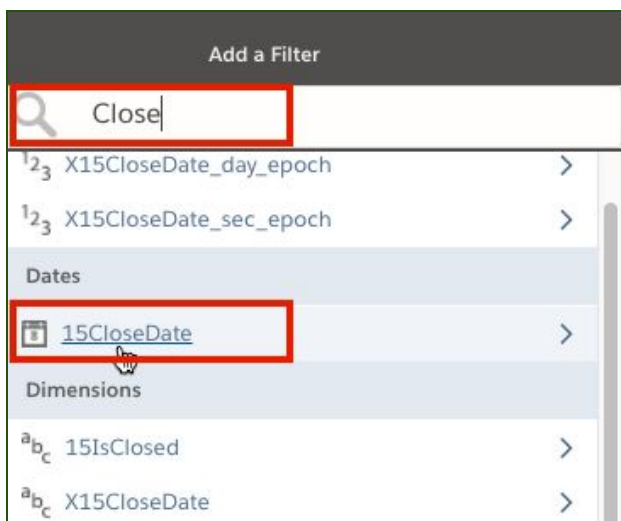
1. Click on the "Filters" button to view and select specific Filter.



2. Enter a name for your Filter in the "Filter Name" box in the upper left corner of the dialogue box. Then click the "+" button to select your Filter criteria.



3. You can filter the data by Measures, Dates or Dimensions. Search for and select each field you want to use.



- After selecting a field, you will be asked to define which portion of this data field you want to see. Next, you will choose from conditions such as "Between", "Greater Than" and "Less Than". Finally, depending on the field your filtering with and the conditions you are applying you may need to set the filter values. Then, click "Add".

The screenshot shows a mobile interface for configuring a filter on the '15CloseDate' field. A dropdown menu is set to 'Between'. Below this, two date pickers are visible: 'From' is set to '01/01/2017' and 'To' is set to '03/31/2017'. At the bottom of the screen, there is a blue button labeled 'Add'.

- Upon clicking the "Add" button, the Filter function for your Dashboard will be created. Each Filter can have several Filter functions. To add additional Filter functions, click on the "+" button and repeat steps 3 and 4.

The screenshot shows a mobile interface for configuring a filter named 'First Quarter 2017'. It displays a list of three filters: (1) 15CloseDate 30/03/217 - 31/12/2016, (2) 15Amount 100000 - 8577295, and (3) 15Industry:Banking. At the bottom, there is a 'Filter Logic' section showing '1 AND 2 AND 3' and an 'Add Filter' button.

★ **NOTE** - Be sure to verify and/or edit the Filter Logic located in the bottom left box.

- Click "Submit" to return to the main page of [TouchAnalytics](#).
- You may add up to five Filters by repeating Steps 1-5.

★ **NOTE** - Verify the Filter Logic of each Filter before clicking on the "Create Dashboard" button. Errors in Filter Logic can prevent the creation of your Dashboard.

Create Dashboard

1. The "Create Dashboard" button will generate a Dashboard in *Analytics Studio*™ based on all given specifications selected in *TouchAnalytics*.



2. Provide a Dashboard Name, Title and Description. Choose the app to indicate where to store the Dashboard and click "Submit" to finalize the creation of the Dashboard.

Dashboard

Dashboard Name: Quarterly Breakout

Dashboard Title: 2017 Quarterly Breakout

Dashboard Description: This dashboard breaks out 2017 by Quarter.

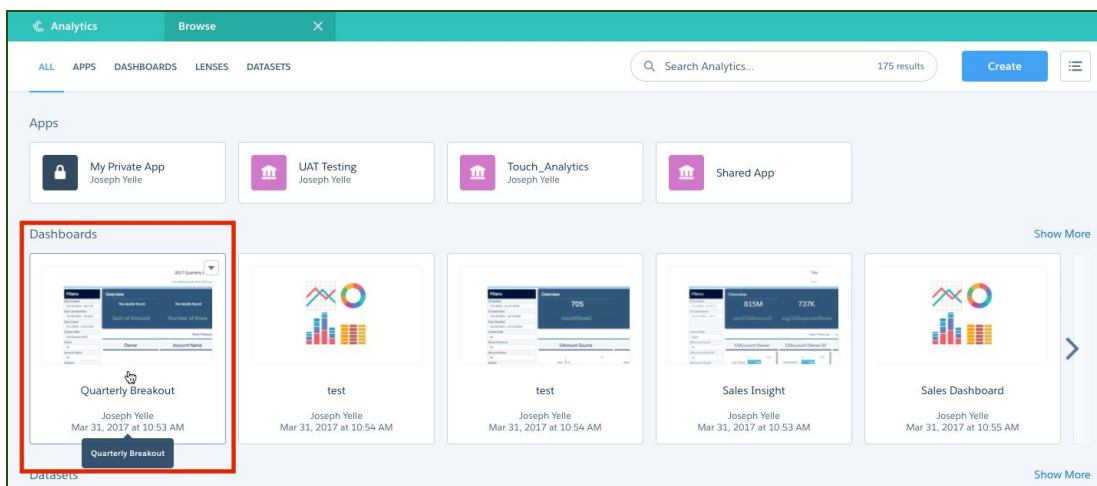
Select App: Touch_Analytics

[Cancel](#) [Submit](#)

3. To return to the *Analytics Studio*™ to view the newly created Dashboard click the "Click here to go to Analytics Studio Wave" link at the top of the interface.



4. Your Dashboard will be listed in the newly created Dashboards section and within the app where you chose to store it in step 2 above.



ACTUAL VS TARGET

The Actual vs Target template provides the ability to quickly create a simple Dashboard that shows target attainment from two datasets.

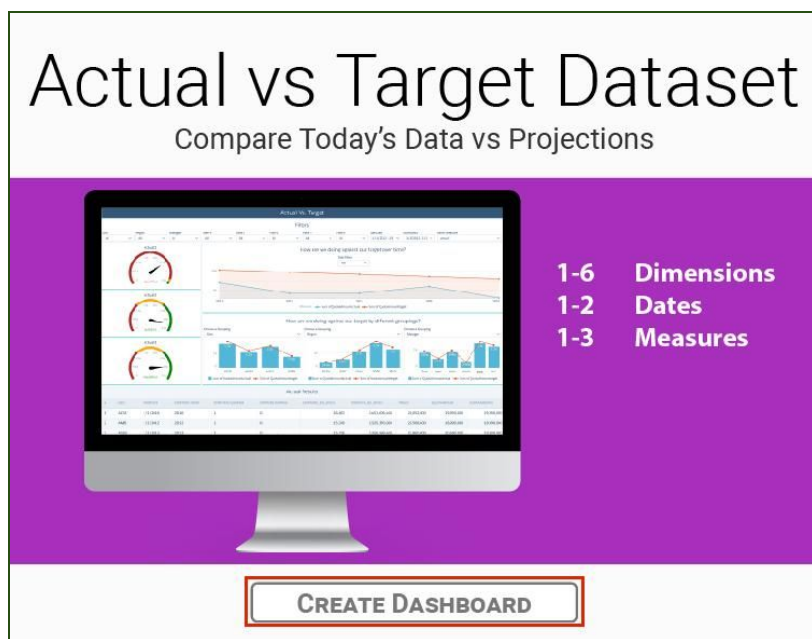
Use Cases

The Actual/Target template is used to create a single Dashboard that allows users to track their attainment of a target that has been defined.

An example of this would be Sales Attainment, where targets have been set for different Sales Reps to attain. This Dashboard will allow you to see where you are today compared to where you should be.

Initial Setup

1. To create a Actual vs Target Dashboard, click on the “Create Dashboard” button at the bottom of the Actual/Target section of the interface.



2. With the Actual vs Target template you will choose two Datasets from *Analytics Studio™* and the dates for each. First, select the dataset for the actual data, then select the target Dataset. Once the Datasets have been selected, choose the date values for each Dataset. Click the “Next” button to continue configuring your Actual vs Target Dashboard.

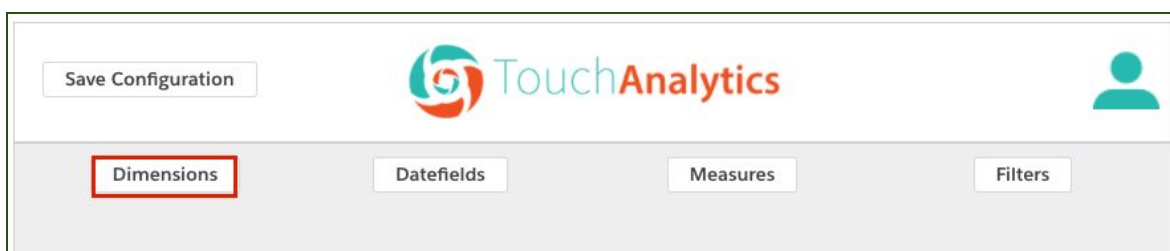
Define Actual vs Target Dashboard Attributes

At this point you will select the Dimensions, Datefields, Measures and Filters needed to create your Actual vs Target Dataset Dashboard for *Analytics Studio™*. The selections you make should be based upon the answers you want from your data about the Key Performance Indicators (KPIs) your organization looks at to measure success.

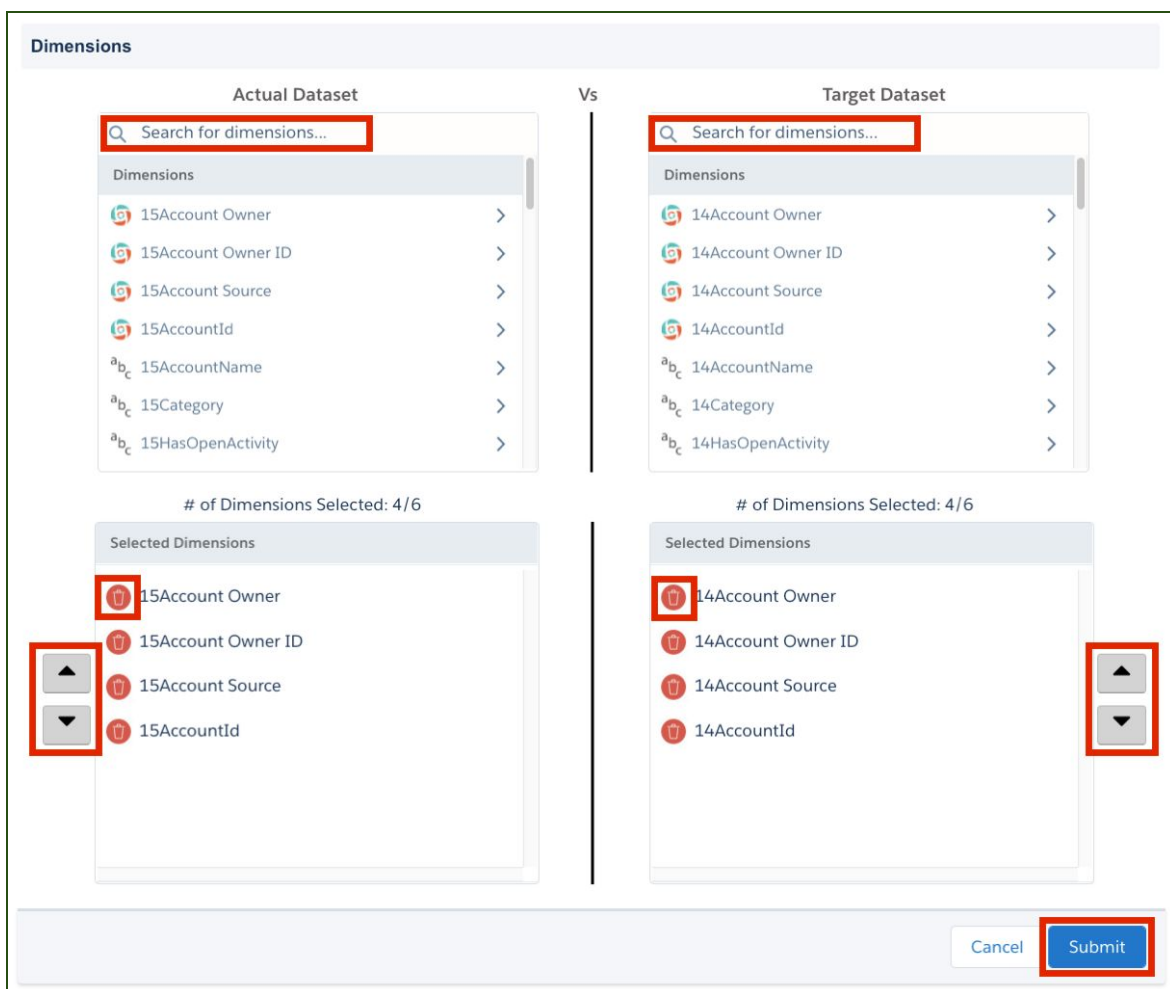
Dimensions

A Dimension is a field from a dataset which contains the information that will be used to construct your Dashboard.

1. Click on "Dimensions" to select the data you want to see in the Dashboard to assess your KPIs.



2. To choose a Dimension, simply click on it in the column on the left to add it to the column on the right. You can remove Dimensions from the column on the right by simply clicking on the red "Delete" icon (a red circle with a white 'T') next to the unwanted Dimension name.



- Use the Up (^) and Down (v) arrows to place your Dimensions in a desired order. First, highlight the Dimension you want to move. Then, click on the Up (^) or Down (v) arrows to place the Dimension in the desired order.

★ **NOTE** - You must select at least 1 but no more than 6 Dimensions with the Actual/Target template.

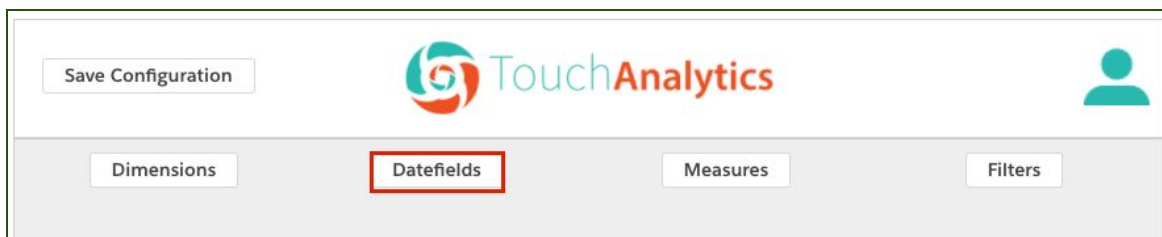
- When all desired Dimensions are added and ordered, click "Submit".
- Click on the "Edit" icon (pencil) to modify the name of a Dimension. Type the desired label name in the dialogue box that appears.

- Click "Save" to finalize the renaming of your Dimensions.

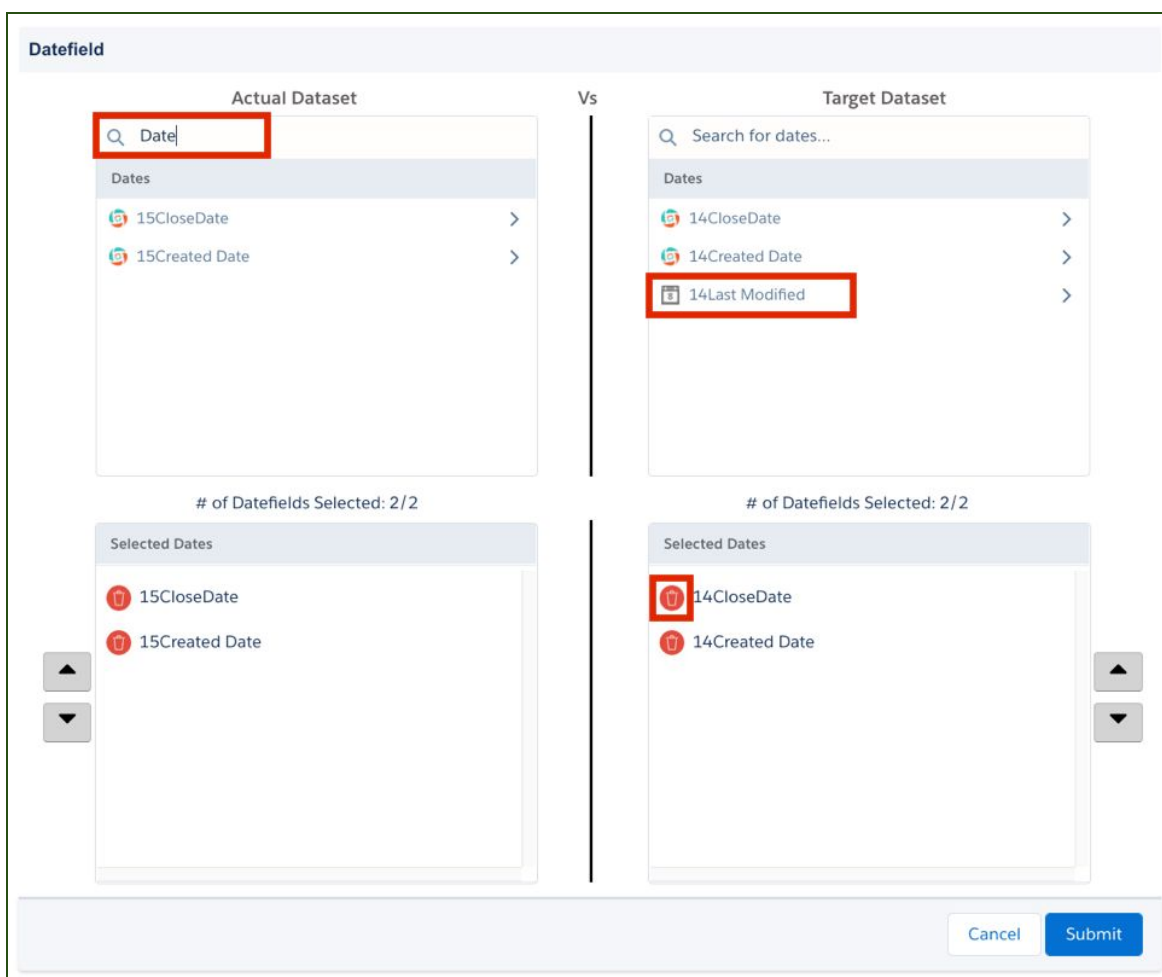
Datefields

A Datefield is a field from a dataset that contains dates such as "Close Date", "Created Date" and "Last Modified". Selecting one or more Datefield allows for the creation of Dashboards which measure KPI performance within a specific timeframe.

1. Click on the "Datefields" button to view and select specific Datefields.

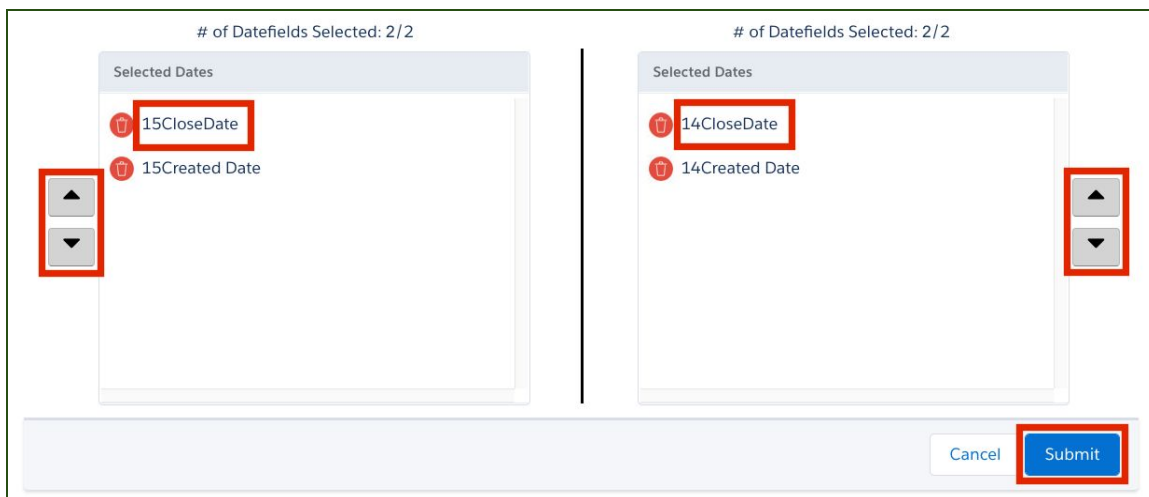


2. To choose a Datefield, simply click on it in the column on the left to add it to the column on the right. You can remove Datefields from the column on the right by simply clicking on the red "Delete" icon  next to the unwanted Datefield name.

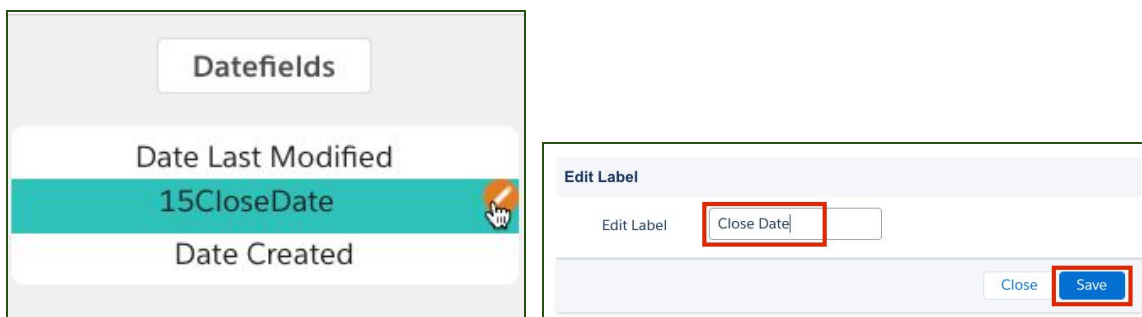


★ **NOTE** - You must select at least 1 but no more than 2 Datefields with the Single Dataset template.

- Use the Up (⤴) and Down (⤵) arrows to place your Datefields in a desired order. First, highlight the Datefield you want to move. Then, click on the Up (⤴) or Down (⤵) arrows to place the Datefield in the desired order.



- When all desired Datefields are added and ordered, click "Submit" to return to the main page of [TouchAnalytics](#).
- Click on the "Edit" icon (✎) to modify the name of a Datefield. Type the desired label name in the dialogue box that appears.



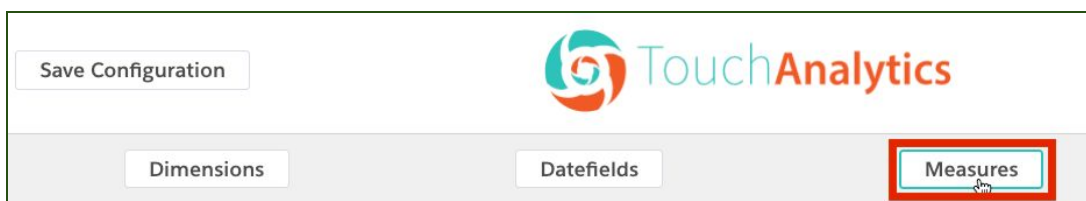
- Click "Save" to finalize the renaming of your Datefields.



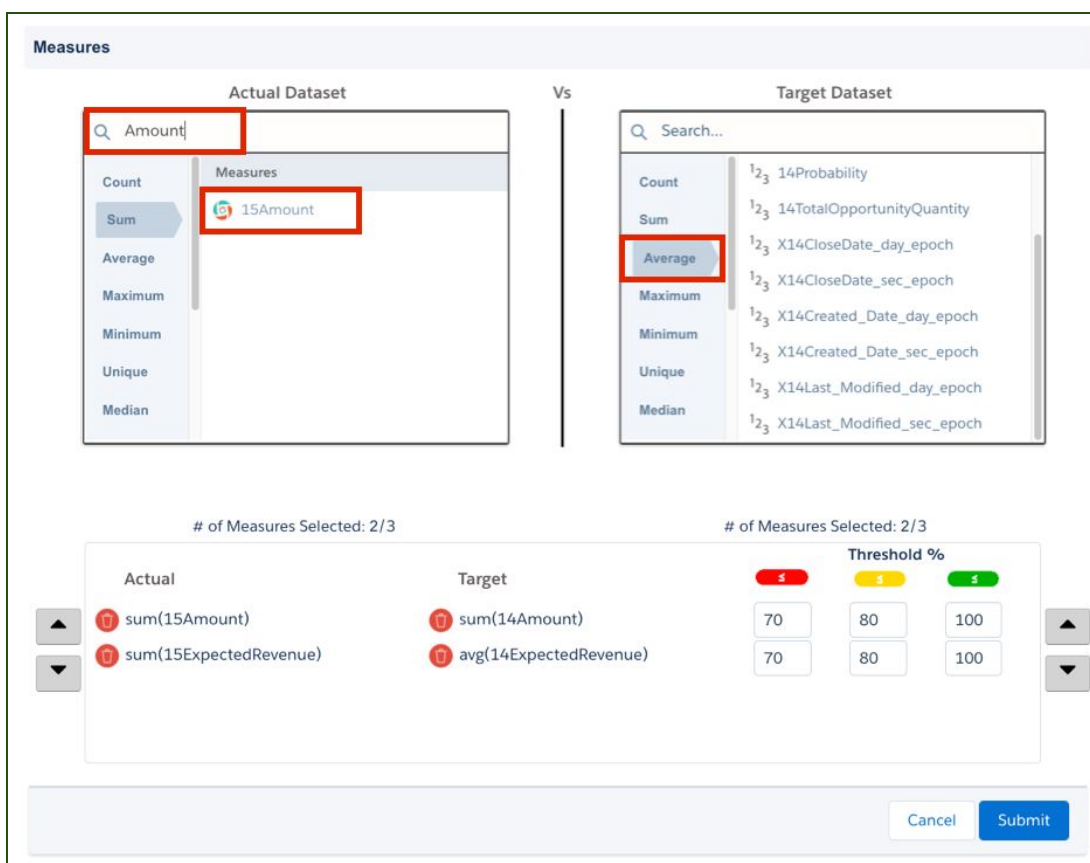
Measures

A Measure can be applied to your Dashboard to calculate numerical data using mathematical operations such as "Sum", "Minimum value", "Maximum value", and "Average value". You can also use the "Count" function to calculate the number of rows in a Dimension.

1. Click on the "Measures" button to view and select specific Measures.



2. Click the desired mathematical operation that the Measure will be based on. Select the field names to create Measure functions for both the Actual and Target Datasets. To search for a specific field name, type in the desired Measure.



- ★ **NOTE** - With the Actual vs Target template you may choose up to 3 Measures for the Actual Dataset and up to 3 Measures for the Target Dataset.

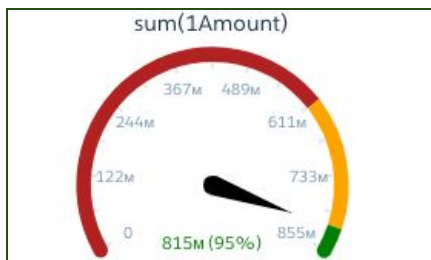
3. Use the Up (^) and Down (v) arrows to place your Measures in a desired order. First, highlight the Measure you want to move. Then, click on the Up (^) or Down (v) arrows to place the Measures in the desired order.

of Measures Selected: 2/3

Actual	Target	Threshold %		
sum(15Amount)	sum(14Amount)	70	80	100
sum(15ExpectedRevenue)	avg(14ExpectedRevenue)	70	80	100

Cancel Submit

4. Enter Target thresholds as percentages in the fields to the right of each Measure. For example, if you want green color to start at 95% of the target and above, then enter 95 in the green column. If you want yellow to start at 80% of the target and go to 95%, then type in 80 for the yellow. Your Dashboard will use these colors to illustrate performance levels.



5. Click on the "Edit" icon (pencil) to modify the name of a Measure. Type the desired label name in the dialogue box that appears. Remove a Measure from your configuration by clicking on the "Delete" icon (trash).

Measures

- count(Rows) [Edit] [Delete]
- sum(15Amount)
- sum(15ExpectedRevenue)

Edit Label

Edit Label Number of Rows

Close Save

6. Click "Save" to finalize the renaming of your Measures.

Measures

- Number of Rows
- Sum of Amount
- Sum of Expected Revenue

Create Dashboard

1. The "Create Dashboard" button will generate a Dashboard in *Analytics Studio™* based on all given specifications selected in **TouchAnalytics**.

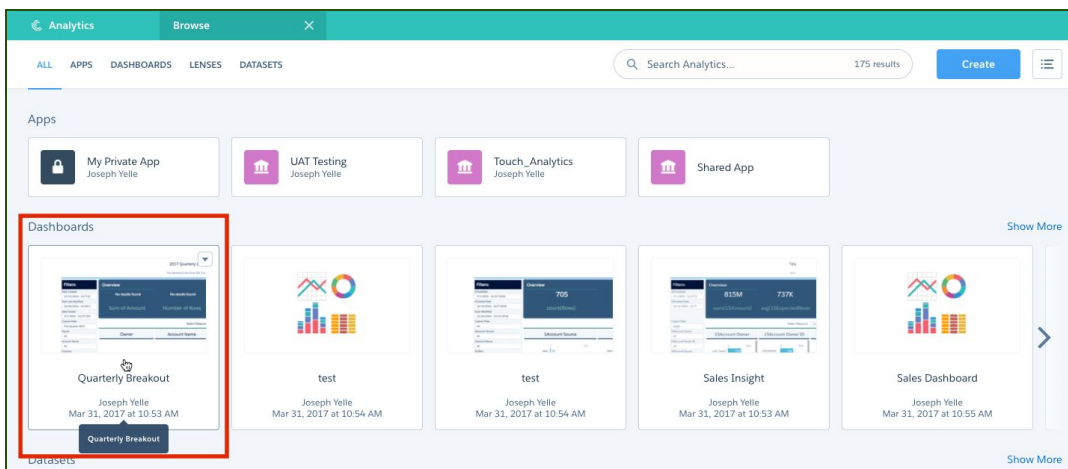


2. Provide a Dashboard Name, Title and Description. Choose the app to indicate where to store the Dashboard and click "Submit" to finalize the creation of the Dashboard.

3. To return to the *Analytics Studio™* to view the newly created Dashboard click the "Click here to go to Analytics Studio Wave" link at the top of the interface.



4. Your Dashboard will be listed in the newly created Dashboards section and within the app where you chose to store it in step 2 above.



Congratulations on completing the Usage Guide!

→ Having trouble?

Please submit an email with any issues regarding our product.

support@analyticscc.com

Type "Touch Analytics" in the subject line.