

Install and Set Up the Analytics Adoption Metadata Package

This package lets you import and augment Einstein Analytics metadata to get meaningful insights into Analytics asset usage.

Use this package to do the following:

1. Create a dataset with Analytics asset IDs and labels. You need this because Salesforce event log lines can't include user-entered information, such as asset labels. This is a compliance limitation.
2. Create a custom object with dataset metadata that links datasets to lenses, dashboards, and apps and provides a count of rows.
3. Schedule updates to the dataset and custom object using a custom Visualforce page.

The dataset created by the package can be used in conjunction with Adoption Analytics app. The package does not include any visualizations.

If users have stored lenses or dashboards in Analytics Private App folders, metadata for the assets can't be included in the Analytics adoption metadata.

Install the Analytics Adoption Metadata Package

1. Go to App Exchange (<https://appexchange.salesforce.com/>) and find the Analytics Adoption Metadata package.
2. Install the package into your Salesforce org. Use the Salesforce credentials of the org where you want to install the package.
3. Select the version of the package that's right for your situation.
 - a. Select **Install for Admins Only** to grant access to Analytics Adoption data to just your org's admin. This is the preferred option.
 - b. Select **Install for All Users** to grant access to Analytics Adoption data to all users in your org. Use only if you want every user in your org to be able to create the Analytics adoption dataset.
 - c. Select **Install for Specific Profiles** to grant access to Analytics Adoption data to only specific user profiles in your org.
4. Click **Install**. After the package installs, click **Done**.

Set Up and Authenticate the Analytics Adoption Metadata Package

Next you have to set up the Analytics Adoption Metadata package. This includes registering the package site in the Remote Site Settings page to enable successful calls to the site's network address.

1. In Salesforce Setup, enter `installed packages` in the **QuickFind** (search) field.
2. Click **Installed Packages** in the left panel.
3. Click the link for **Analytics Adoption Metadata** under **Package Name**.
4. In the **Package Details** window, look for **Post Install Instructions** and click the **View** link next to that.
5. Click **Done** in the upper right corner. You'll be asked if you want to allow access. Click **Allow**. You should see a page that tells you that you've successfully authenticated the app.
6. If you see an error message, your Salesforce org is not registered in Remote Sites. Here's what to do to register your org:
 - a. Look for `endpoint` = in the message and copy the part of the URL next to it up to 'salesforce.com', for example <https://xy43.salesforce.com>. This is the URL for your Salesforce org.
 - b. In Salesforce Setup, enter `remote` in the **QuickFind** (search) field. Select **Remote Site Settings** in the left panel.
 - c. In the **Remote Site Settings** window, enter the URL you copied from the error message into the **Remote Site URL** field. Enter a name you can easily remember in the **Remote Site Name** field, and click **Save**.
 - d. In Setup, enter `installed packages` in the **QuickFind** (search) field. Click **Installed Packages**, then click the link for **Analytics Adoption Metadata**. Click **View**, then **Done**.
 - e. You should now see the success page.

Set a Time to Refresh Analytics Adoption Metadata

Now that you've authenticated the app, you need to set a time each day to refresh the data with any new Analytics asset names if any new assets were created after the previous refresh.

1. On the page with the app authentication success message, click **Take me to the App**.
2. You'll see a page that lets you set a time each day for the. Select a time one or two minutes into the future so the first refresh happens right away.

3. Click **Save Time**, **OK**, and Close. You'll see a screen telling you that a metadata update is in progress.
4. Wait until after the time you set for the refresh.

View the AnalyticsAssetLabels Dataset

After waiting for the data refresh, you're ready to view your dataset and start exploring the data.

1. In Analytics Studio, enter `analytics asset` in the search field at upper right.
2. The AnalyticsAssetLabels dataset should appear in the main window. If you don't see it, here's what to do:
 - a. Click the wheel icon  at upper right, and select **Data Manager**.
 - b. Click the refresh icon  at upper right until you see AnalyticsAssetLabels in the list of jobs with the status **Successful**.
 - c. Go back to Analytics Studio and enter `analytics asset` in the search field again.
3. The dataset may be in the Analytics Private App folder. Move it to the Shared App folder where it can be used by other apps.
 - a. Click the arrow to the far right of the dataset name and click Edit.
 - b. In the App section of the window that opens, click the pencil (edit) icon.
 - c. Type `shared` in the Search apps field.
 - d. Select **Shared App**.
4. Click the AnalyticsAssetLabels dataset to open it. Now you can start exploring your Analytics asset metadata. See [Explore and Visualize Your Data](https://help.salesforce.com/articleView?id=bi_explorer.htm&type=5) (https://help.salesforce.com/articleView?id=bi_explorer.htm&type=5) to learn how.