Business Systems Innovation Labs

Lab 1b Pre-flight Checklist

"DataMatic: It Slices, It Dices, Visualizes & Analyzes"

Follow along with Max again as she figures out
how to slice, dice, visualize and analyze Riley's pitch data
to make it more useful.

Prep: What do you need to start?

- ✓ You need a debit/credit card or Paypal account to pay the lab fee on **Step 7**. (Just $19.99 once covers them all.)
- ✓ **Critical!** – <u>Before you start</u>, do the following to prevent problems due to an ongoing Salesforce glitch:
  1) Click your name, near the upper right, for a drop-down menu & click **My Settings**
  2) Under the **My Settings** menu on the left, click **Personal** and then click **Language & Time Zone** below
  3) In the center of the screen, use the menu to make sure **Locale** shows "English (United States)" & click **Save**
- ✓ Remember: you can click on any image in the lab to see a larger version (easier to see details).
- ✓ If you did NOT do Lab 1a, np–but go back to 1a:page 2 to get your SF account, then start this one at **Step 6**.
- ✓ If you get stuck, find help/answers at The Max Labs Project Community here: http://tiny.cc/maxhelp

Learning Objectives: What to "get"

- ✓ See how a database makes it easy to slice & dice the data to see just what you want/need.
- ✓ Get a feel for putting together meaningful reports, fast.
- ✓ Get the *power* of visualizing data for doing business better/faster/smarter.
- ✓ See how you can track & monitor goals using dashboards.
- ✓ **Grasp the <u>business value</u> of *leveraging* data thru data-based systems.**

Deliverables: Get your points

This time there are four (4) points marked for you to stop and take a screen capture to submit for credit. Match the numbers below with the annotations in the blog:

1 When you reach this point (after Step 64), the **Loaded & Likely Angels Only** view on your screen should match the screen cap embedded in the blog, just above the screen cap symbol. You should see the same two records listed. Do a screen capture and submit for credit.

2 At this point (after Step 84), you just clicked **Save and Run Report** so you should see the report that shows all ten (10) records, grouped by **Type** and shows the average **Investment Amount** and **Equity Percentage** for each group. Do a screen capture and submit for credit.

3 Now (after Step 101), you should be seeing the chart showing the jagged line that plots **Investment Amount** against **Equity Percentage**. Do a screen capture and submit for credit.

4 At this point (after Step 157), your screen should show exactly the same dashboard gauge that is depicted in the screen cap embedded in the blog. Do a screen capture and submit for credit.

Tips: Get more

Create your own splash image/logo, like Max did, and figure out how to upload it and make it appear when you open your mobile app. See Max's hint on the first page, just below her *Spartapps in the Cloud by Max* image.