



# RPX101

## Fundamentals of Report Creation in Lightning Experience

# TOPICS

### **Reports Tab, Folders, and Formats**

- Navigate the Reports Tab to Find Suitable Reports
- Create Custom Folders in Classic to be Used in Lightning
- Describe the Different Formats of Reports
- Run and Modify Existing Reports

### **Using the Report Builder**

- Establish a Report Building Process
- Navigate the Report Builder
- Create Custom Reports Using a Standard Report Type
- Use Filters and Filter Logic
- Export Your Report

### **Summarizing Your Data**

- Understand the Difference Between a Summary and Matrix Report
- Use Bucket Fields to Segment Your Data
- Use Custom Summary Formulas to Perform Calculations on Your Report Data

## Getting More Insight from Your Data

- Add Conditional Highlighting to a Report
- Create Charts to Display Summary Data
- Schedule and Email a Report to Run

## Dashboards

- Articulate What a Dashboard Is
- Understand the Benefits of Creating Dashboards in Lightning
- Create a Dashboard Using the Dashboard Builder

