

Module 2 – Reporting and dashboarding for projects: Expert Business Practitioner Exam Toolkit

Section 2.1 Getting started with Reports and Analytics | Adobe Analytics

Using Reports & Analytics: Understanding Login and Setup Tasks, and Accessing Account Information

IMPORTANT

Effective December 31, 2023, Adobe has decided to discontinue Reports & Analytics along with its associated reports and features. This means that after the specified date, Reports & Analytics, as well as all its reports and schedules, will cease to function. The reason behind this decision is that the reports, visualizations, and underlying technology no longer meet Adobe's technology standards. However, the majority of Reports & Analytics features are now available within Analysis Workspace. Since the introduction of Analysis Workspace in 2015, the functionality and capabilities of Reports & Analytics have been successfully transitioned to Analysis Workspace, achieving a threshold of workflow parity. This notice serves to explain the [end-of-life process for Reports & Analytics](#).

Reporting Insights

Reporting offers valuable insights into various channels, including traditional web-based channels and emerging platforms like mobile, video, and social networking. Some of the reports include:

- Number of site visitors
- Count of unique visitors (counted only once)
- Traffic sources (e.g., direct visits, referral links)
- Keywords used by visitors to search for site content
- Duration of visits on specific pages or the entire site
- Clicked links and exit points from the site
- Most effective marketing channels for generating revenue or conversion events
- Time spent on watching videos
- Browsers and devices used by visitors to access the site

Browser and System Requirements

To log in and access the Reports & Analytics interface, ensure your system meets the following requirements:

- Preferred Browsers: Latest versions of Firefox, Chrome, Safari, or Edge.
- Enable Cookies and JavaScript.
- Monitor Resolution: 1024 x 768 with 16-bit color depth or higher.

Logging in to Reports and Analytics

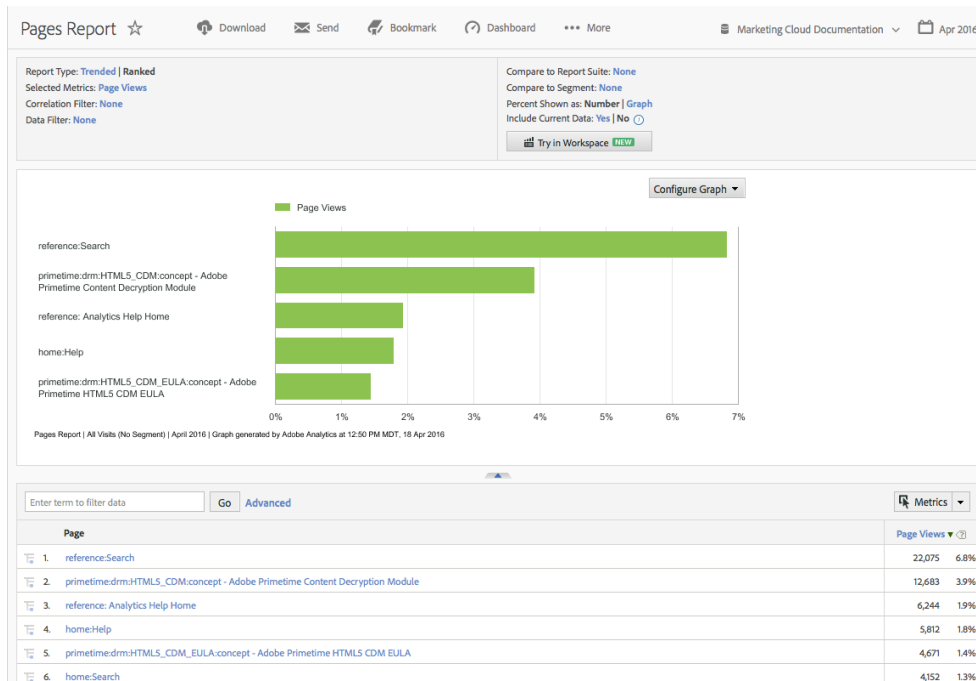
Before accessing the Reports & Analytics interface, coordinate with your Adobe Account Team or Customer Care to set up your company's account. To log in through the Adobe Experience Cloud, follow these steps:

1. Open a web browser on a computer with Internet access.
2. Go to <https://login.experiencecloud.adobe.com/>.
3. On the Sign-In page, click Single Sign-On.
4. Enter the required information, including Company ID, Account ID, and Account Password, then click Sign In.
5. Once logged in, go to Analytics > Reports from the Experience Cloud home page.
6. The system will automatically log you out after 30 minutes of inactivity.

Running a Report

To generate a report in Reports & Analytics:

1. Log in to Reports & Analytics. The Reports menu displays, or a [dashboard](#) displays, if you have set one up.
2. Click on the desired report category, such as Site Content > Pages. See [Report Features](#) for information about interface features of a report.



Editing a User's Account Settings

You have the ability to view and edit user account settings, including resetting passwords and editing contact information. Access the Account Information page by clicking the Account icon at the top right and then clicking the Account Settings (wheel) icon next to your login name. The following information is available for viewing or editing:

- **Contact:** Personal information, including First Name, Last Name, Title, Email Address, and Phone Number (Required).
- **Login:** Displays the account username and allows you to change the account password. For password reset instructions, refer to "[How to reset Reports & Analytics account password.](#)"
- **Web Service:** Shows the web services username and shared secret associated with the account. This information is only visible if the account is authorized as a web services user.
- **Exclude this Computer:** You can apply a cookie to the current computer to exclude it from data collection. This is useful if you prefer not to have your online activities affecting Page View and Visitor counts in your domain. Note that this feature requires enabled cookies in your browser, and if you delete cookies, you must reset the exclusion cookie.

Changing the Interface Language

You can customize the Reports and Analytics interface language according to your preference. Follow these steps:

1. Log in to Analytics and select the Reports tab.
2. In the page footer, click the active language in the Language menu, and then choose your preferred language.

Accessing Documentation and Help

You can access the documentation and the Home Page from the [Adobe Experience Cloud](#). (Help > Help Home.)

NOTE

This product is authorized for sale in North America and other regions where the product is sold. It may not meet the local requirements for sale in other countries or regions.

Additional Resources:

- Overview of the reporting interface
 - [About Data Collection](#)
 - [Reports Menu](#)
 - [Report Features](#)
 - [Common Terms](#)
 - [Report display settings and navigation](#)
 - [Report schedule and distribution](#)
 - [End-of-life notice for scheduled reports](#)
 - [Report types](#)
 - [Run different report types](#)
 - Customize reports
 - [Customize reports overview](#)
 - [Change report graphs](#)
 - [Breakdowns](#)
 - [Subrelations](#)
 - [Filtering Report Data](#)
 - [Analytics Segmentation](#)
 - [Bookmark Manager](#)
 - [Current Data](#)
 - [Dashboards and reportlets](#)
 - [Dashboard Manager](#)
 - [Funnel reports](#)
 - [Metrics](#)
 - [Targets](#)
 - [Alerts](#)
 - [Calendar events](#)
 - [Frequently Asked Questions](#)
 - [Troubleshooting](#)
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Section 2.3 Adobe Analytics dashboards| Adobe Analytics

Adobe Analytics dashboards - Overview

Adobe Analytics dashboards provide anytime, anywhere insights from Adobe Analytics. The app allows users mobile access to intuitive scorecards. Scorecards are a collection of key metrics and other components presented in a tiled layout that you can tap for more detailed breakdowns and trended reports. The mobile app is supported on both iOS and Android operating systems.

To learn more about Adobe Analytics dashboards, refer to the following resources:

Curator resources: Intended to help curators of data configure scorecards for their executive users on dashboards. Curators may be organizational administrators or persons in other roles who are responsible for setting up Scorecards.

Resource	Description
Create scorecards	Guidelines on how to create scorecards for dashboards.
Assist executives with app setup and using the app	Information on assisting executives with app setup and usage.
Adobe Analytics dashboards Scorecard Builder	A video overview of the curation experience.

Executive user quick start guide: This guide is intended to help executive users read and interpret Scorecards on dashboards. The app allows executive users to view a broad rendering of important summary data quickly and easily on their own mobile devices.

Resource	Description
Adobe Analytics dashboards In-App Experience	A video highlighting the in-app experience for executives.

Please note that the hyperlinks will take you to the respective resources for more detailed information about Adobe Analytics dashboards.

Important: Please review all the hyper-links, they are a part of this toolkit.

Section 2.3 Projects overview| Adobe Analytics

Workspace projects enable you to create powerful analyses by combining data components, tables, and visualizations. You can easily share these projects with colleagues within your organization. Before getting started with your first project, familiarize yourself with how to access, navigate, and manage your projects.

[Here](#) is a video on how to build a Workspace project:

Project List

When you access Analytics > Workspace, the page displays a list of all the projects you own or have been shared with. This is also the default landing page for Adobe Analytics unless you have set a custom landing page.

The Projects page contains the following information:

NOTE: Some columns may not be displayed by default. To customize the columns you see, click the "Customize table" icon.

Element	Description
Edit preferences	Manage settings for Analysis Workspace and its related components for all new projects or panels that you create.
Create folder	Add a new folder or subfolder to the list of projects and folders.
Create project	Start a new project from scratch or from a report.
Show more	Reveals options for creating a blank project or mobile scorecard, viewing training tutorials , or viewing release notes .
Show Folders & Projects	Choose whether to show the folder structure of projects. For more information, see About Folders in Analytics .
Customize table (icon)	Allows you to customize the information that shows for each project on the Projects page.
Name	Name of the Workspace project.
Type	Indicates whether this is a Workspace Project, a folder, or a Mobile Scorecard .
Tags	Tags that were applied to the project.
Scheduled	Indicates whether projects are scheduled to be emailed to recipients on a schedule. See Schedule projects .
Shared link (anyone)	Projects can be shared with anyone—even with people who don't have access to Analysis Workspace. This column shows whether projects have been shared in this way. See Share a project with anyone (no login required) in Share projects for more information.
Report suite	The report suite that the project is associated with.
Project Role	Indicates your role for the project - owners, edit, duplicate, view.
Owner	The person who created this project (either you or someone who shared the project with you.)
Shared with	Users that the project has been shared with.

Last Modified	Date and time when the project was last modified.
Last Opened	Date and time when the project was last opened.
Project ID	The ID of the project.
Longest Date Range	The longest date range of the project.
Number of Queries	The total number of queries contained in the project.
Location	The folder where the project resides.

Within a project, the menu provides options for managing your project, adding components, finding help, and more. Each menu option can also be accessed by keyboard [shortcuts](#).



Menu item	Description
Project	Includes common actions for project management, including New, Open, Save, Save as, and Save as company report . You can also refresh the entire project to retrieve the most recent data and definitions by clicking Refresh Project. Download CSV and PDF options enable you to export data from Workspace. Project Info & Settings offers many options for managing your project.
Edit	Undo or redo your last action. Clear All will reset your project to a blank starting point.
Insert	Insert new panels or visualizations from this menu. You can also insert new panels and visualizations from the left rail.
Components	Create new segment, calculated metric, date range, or alert components from your project. You can also create new components from the left rail. If your component definitions have recently changed, Refresh Components will retrieve the latest definitions.
Share	Curate, share and schedule PDF/CSV projects to recipients in your organization.
Help	Access help documentation, videos, and the Analytics Experience League community . Manage the visibility of Workspace tips as well as the debugger . Find details about Workspace and factors that impact project performance .
Share button or Owner	If you are in an Own or Edit for the project, the Share button in the top-right gives you one-click access to manage your project recipients. If you are in a

	Duplicate or View role for the project, you will see the project owner's name.
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Project Info & Settings

Workspace > Project > Project Info & Settings provides project-level information on the currently active project.

Project Info & Settings

Project Name
New project

Owner

Last Modified
1 Nov 2018 1:33:56pm

Tags
Add tags ▼

Count repeat instances ?

Visualization Color Palette ?

▼

View Density

Compact

Comfortable

Expanded

Cancel
Save

Settings include:

Setting	Description
Project Name	The name given to the project. You can double-click the name to edit it.
Created By	Project owner name
Last Modified	Date of last modification to the project.
Tags	Lists any tags applied to a project for easier categorization.
Description	A description is useful for clarifying the purpose of a project. You can double-click the description to edit it.
Count repeat instances in	Specifies whether repeat instances are counted in reports. For example, this setting (when activated) treats multiple consecutive pages views to the same page as multiple

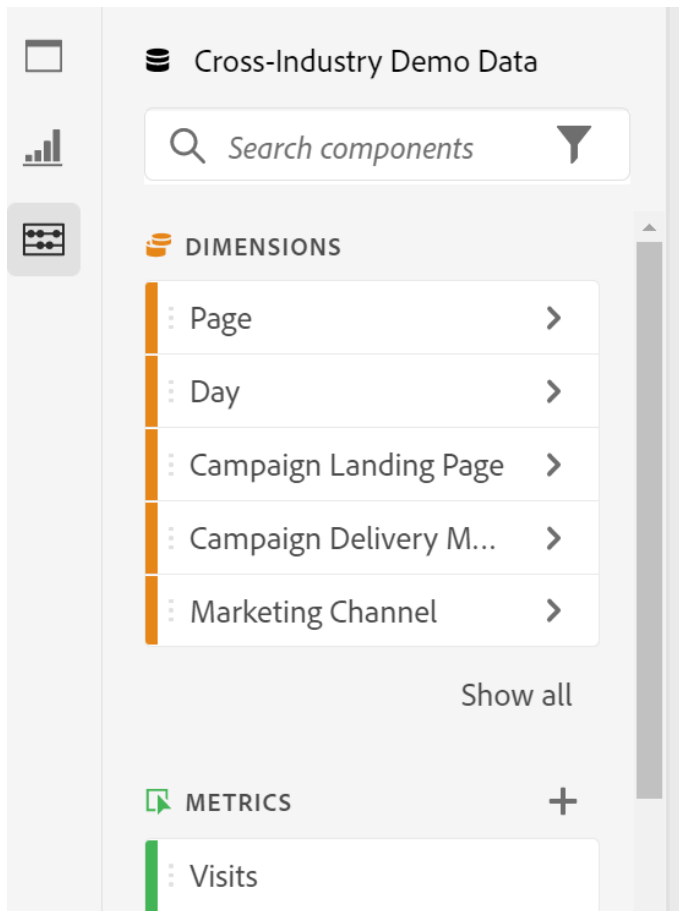
project	page views. With it off, they count as a single page view (this only affects certain metrics, such as Single Page Visits). Note: This setting does not apply to Flow or Fallout visualizations.
Project color palette	You can change the categorical color palette used in Workspace, by choosing from out-of-the-box palettes that have been optimized for color blindness, or by specifying your custom palette. This feature affects many things in Workspace, including most visualizations.
View Density	Lets you see more data on the screen by reducing the vertical padding of the left rail, freeform tables and cohort tables.

Left rail

Within a project, [panels](#), tables, [visualizations](#), and [components](#) are accessed from the left rail. These are your project building blocks.

You can also access visualizations and panels from the [Blank Panel](#) as well.

Components (Dimensions, Metrics, Segments, Date Ranges) in the left rail relate to the active panel report suite. The active panel will have a blue border around it, and the active report suite will be listed at the top of the component rail.



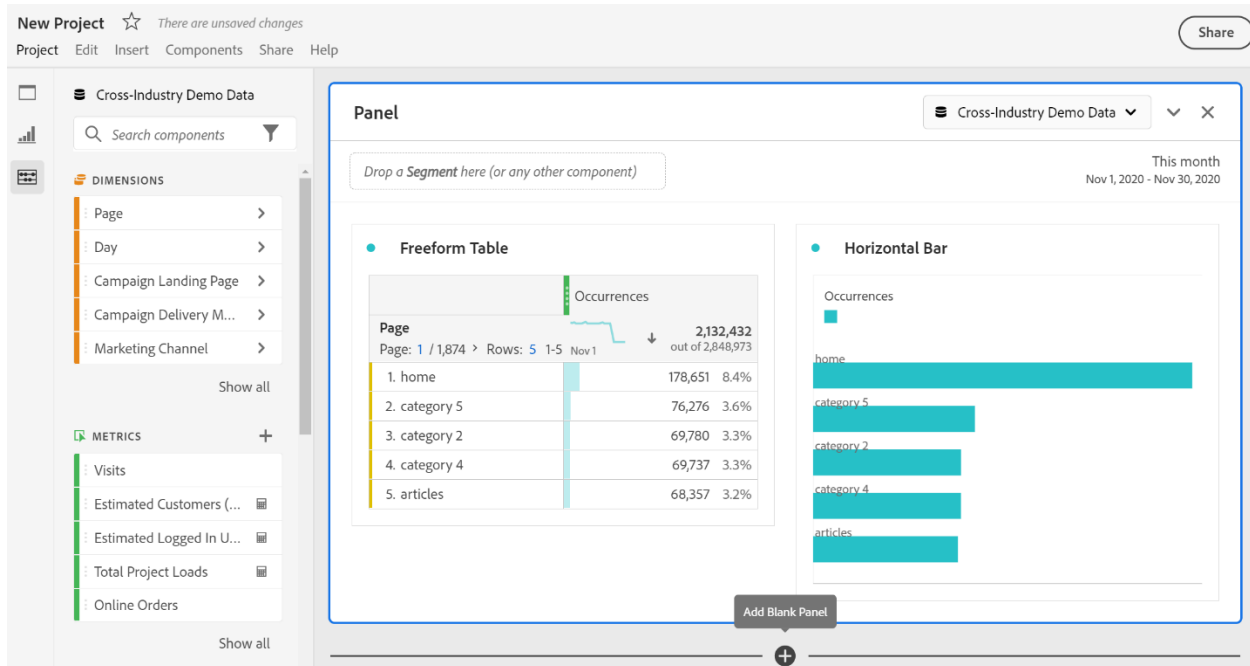
[Here](#) is a video on using the right-click menu in Analysis Workspace.

Project canvas

The project canvas is where you bring together panels, tables, visualizations, and components to build your analysis. A project can contain many panels, and each panel can contain many tables and visualizations.

Panels are helpful when you want to organize your projects according to time periods, report suites, or analysis use case. The active panel will have a blue border around it, and determines what components are available in the left rail.

Depending on the starting point you chose for your projects, you will either have a [freeform table](#) or a [blank panel](#) in the canvas to begin with. The quickest way to start analyzing is to select one or many components and simply drag & drop them into the project canvas. A table of data will automatically be rendered for you. [Learn more](#) about the different options for building a table, or leverage our [training tutorial](#) for more guidance on building your first project.



Project Manager

Analysis Workspace projects can be managed under **Analytics > Components > Projects**. The Project Manager shows the items that a specific user has created.

Project ownership can be transferred to a new user under **Admin > Analytics Users & Assets > Transfer Assets**.

In the Projects Manager, you can add, tag, share, duplicate/copy, and more. Search for a project in the search bar or by using the filter options in the left rail. You can filter by tag, owners, project type and more.

The screenshot shows the Adobe Analytics Project Manager interface. The top navigation bar includes 'Adobe Analytics', 'Workspace', 'Reports', 'Components', 'Tools', 'Admin', and 'Labs'. The main area is titled 'Projects' and features a search bar and a list of projects. The list has columns for 'TITLE & DESCRIPTION', 'REPORT SUITE', 'OWNER', 'TYPE', 'PROJECT ROLE', 'TAGS', 'SHARED WITH', and 'DATE MODIFIED'. Two projects are visible: 'New Project' and 'Test project'.

TITLE & DESCRIPTION	REPORT SUITE	OWNER	TYPE	PROJECT ROLE	TAGS	SHARED WITH	DATE MODIFIED
☆ New Project	Cross-Indus...	Jen Lasser	Workspace ...	Owner			Nov 23, 202...
☆ Test project	Analytics SPA	Jen Lasser	Workspace ...	Owner			Nov 23, 202...

The following are common actions in the Projects manager, and can be taken on one or many projects at once:

Action	Description
Add	Create a new project from scratch or start from a report .

Tag or Approve	Choose “Tag” or “Approve” to organize your projects and make them easier to search for.
Share	Make a project available to other Analysis Workspace users in your organization.
Delete	Delete your project.
Rename	Edit the name of your project.
Copy	Create a duplicate copy of your project. This creates a new project and project ID. Any shares or schedules tied to the original project will not be copied.
Export to CSV	Download your project as a CSV file, which includes plain-text data.

Section 2.4 Visualizations overview | Adobe Analytics

In Workspace, you have access to various visualizations that enable you to create compelling representations of your data. These include bar charts, donut charts, histograms, line charts, maps, scatterplots, and more. While many of these visualization types might already be familiar to you if you use Adobe Analytics, Analysis Workspace goes a step further by offering additional visualization settings and introducing new and unique visualization types with interactive capabilities.

Visualization types

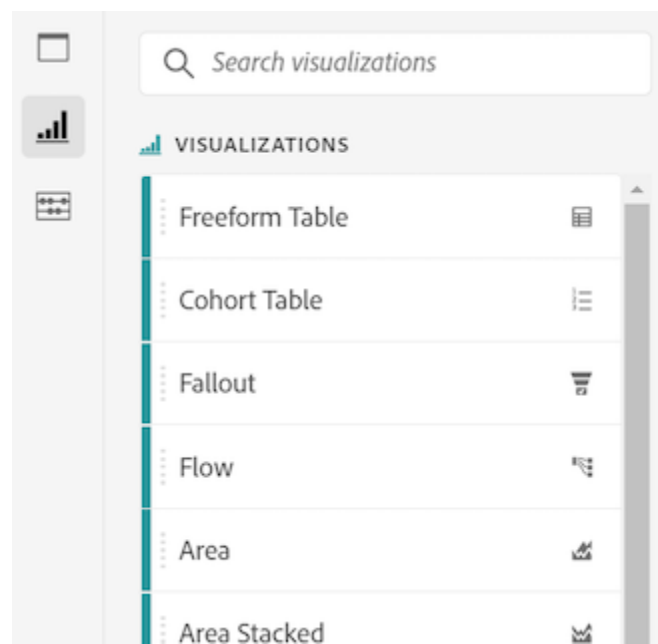
The following visualization types are available in Analysis Workspace:

Visualization name	Description
Area	Like a line graph, but with a colored area below the line. Use an area graph when you have multiple metrics and want to visualize the area expressed by the intersection of two or more metrics.
Bar	Shows vertical bars representing various values across one or more metrics.
Bullet graph	Shows how a value you are interested in compares to or measures against other performance ranges (goals).
Cohort table	A <i>cohort</i> is a group of people sharing common characteristics over a specified period. Cohort Analysis is useful for retention, churn or latency analysis.
Donut	Similar to a pie chart, this visualization shows data as parts or segments of a whole.
Fallout	Fallout reports show where visitors left (fell out) and continued through (fell through) a predefined sequence of pages. Can be set to eventual or exact sequences
Flow	Shows exact customer paths through your websites and apps.
Freeform table	A Freeform table is not merely a data table, but also an interactive visualization. It is the foundation for data analysis in Workspace.
Histogram	A histogram buckets visitors, visits or hits into buckets based on a metric volume.
Horizontal bar	Shows horizontal bars representing various values across one or more metrics.
Key metric summary	Shows how a metric is trending within a single timeframe, or lets you compare metric performance across two timeframes.
Line	Represents metrics using a line in order to show how values change over a period of time. A line chart uses time along the x-axis.
Map	Lets you build a visual map of any metric (including calculated metrics).
Scatterplot	Shows the relationship between dimension items and up to three metrics.
Summary number	Shows the selected cell as 1 large number.
Summary change	Shows the change between the selected cells as 1 large number/percent.

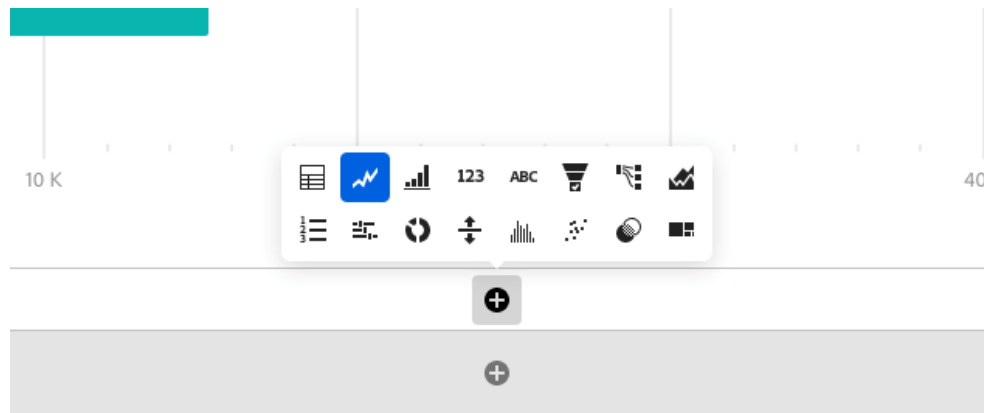
Text	Lets you add user-defined text to your Workspace. Helpful for adding additional context to your analysis and insights, in addition to leveraging panel/visualization descriptions
Treemap	Displays hierarchical (tree-structured) data as a set of nested rectangles.
Venn	Uses circles to depict the metric overlap of up to 3 segments.

Add visualizations to a panel

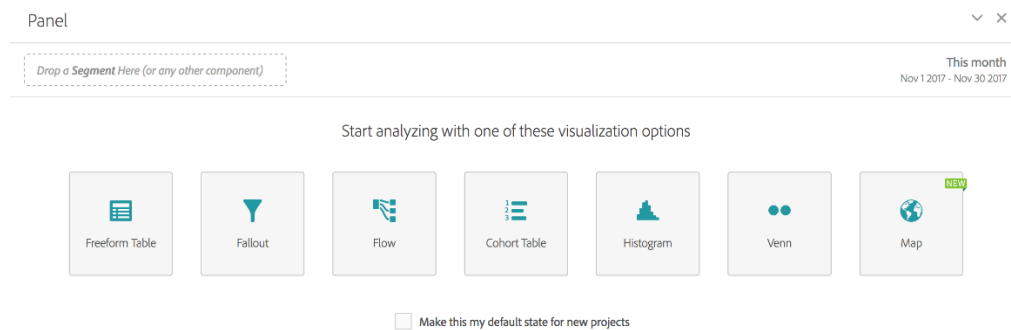
1. Open the Analysis Workspace project where you want to add a visualization.
2. Use any of the following methods to add the visualization:
 - In the left rail, select the **Visualizations** icon , then drag a visualization to the panel where you want to add it.



- On the panel where you want to add the visualization, select the **Plus** icon, then choose the icon that represents the visualization that you want to add. Hover over the icon for each visualization to see its name.



- Add a [blank panel](#), then choose the visualization that you want to add.



- Right-click an existing panel in your Analysis Workspace project, then select **Duplicate visualization** or **Copy visualization**.

Customize visualization settings

You can customize visualization settings for an individual visualization, or for all visualizations that you create.

Customize visualization settings for a single visualization

To access Visualization Settings for an individual visualization:

1. In Analysis Workspace, hover over the visualization whose settings you want to customize.
2. Click the gear icon.

Each type of visualization has unique settings that you can customize. For information about available settings, see [Settings](#).

Customize visualization settings for all visualizations you create

You can customize settings for all visualizations that you create. For more information, see [User preferences](#).

Settings

Settings

Visualization type: Granularity:

GENERAL

Percentages

Legend visible

Limit max items

OVERLAYS

Show anomalies

Show min

Show max

Show trendline

AXIS

Display dual axis

Normalization

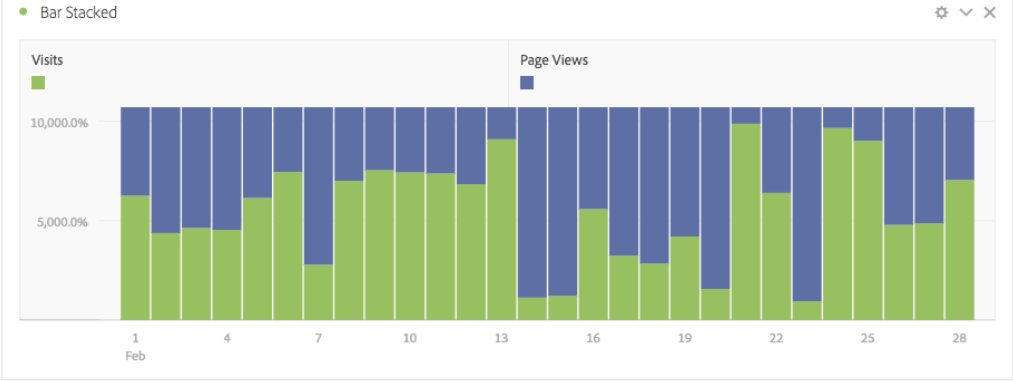
Show X-axis

Show Y-axis

Anchor Y-axis at zero

Allow anomalies to scale Y-axis

Setting	Description
Visualization Type	Change the type of visual used to depict the data.
Granularity	For trended visualizations, you can change the time granularity (day, week, month, etc.) from this drop-down list. This change also applies to the data source table.
Percentages	Displays values in percentages.
100% Stacked	This setting on area stacked, bar stacked or horizontal bar stacked visualizations turns the chart into a “100% stacked” visualization. Example:

	
Legend Visible	Lets you hide the detailed legend text for the Summary Number/Summary Change visualization.
Limit Max Items	Lets you limit the number of items that a visualization displays.
Anchor Y Axis at Zero	If all the values plotted on the chart are considerably above zero, the chart default will make the bottom of the y-axis NON-ZERO. If you check this box, the y-axis will be forced to zero (and it will re-draw the chart).
Normalization	Forces metrics to equal proportions. This is helpful when plotted metrics are of very different magnitudes.
Display Dual Axis	Only applies if you have two metrics - you can have a y-axis on the left (for one metric) and on the right (for the other metric). This is helpful when plotted metrics are of very different magnitudes.
Show Anomalies	Enhances line graphs and freeform tables by displaying anomaly detection. Anomaly detection in line visualizations includes an expected value (dashed line) and an expected range (shaded band).

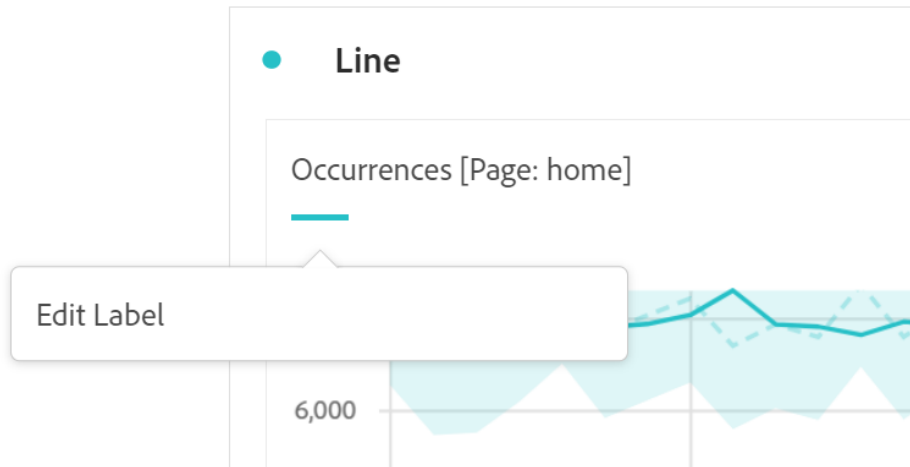
Legend

A visualization legend helps you to relate data in a source table to plotted series in the visualization. The legend is interactive - you can click a legend item to show/hide a series in the visualization. This is helpful if you want to simplify the data being visualized.

Additionally, you can rename legend labels to help you make visuals more consumable. Note: legend editing does **not** apply to: Treemap, Bullet, Summary Change/Number, Text, Freeform, Histogram, Cohort or Flow visualizations.

To edit a legend label:

1. Right-click one of the legend labels.
2. Click **Edit Label**.



3. Enter the new label text.
4. Press **Enter** to save.

Right-click menu

Additional functionality for a visualization is available by right-clicking on the visualization header. Settings will vary by visualization. Some of the settings available are:


The image shows a "Freeform Table" visualization. A context menu is open over the table, listing several actions: "Copy data to clipboard", "Copy visualization", "Download items as CSV (Page)", "Download data as CSV", "Duplicate visualization", "Edit description", and "Get visualization link". The table data is as follows:

Page	Count	Percentage
Page: 1 / 188 > Rows: 50	208,556	
1. home	17,517	8.4%
2. category 5	12,707	3.6%
3. category 2	8,338	3.3%
4. category 4	6,535	3.3%
5. articles	6,000	3.2%
6. category 3	69,176	3.1%
7. search results	68,917	3.1%

Setting	Description
Insert Copied Panel/Visualization	Lets you paste (“insert”) a copied panel or visualization to another place within the project, or into a completely different project.
Copy Visualization	Lets you right-click and copy a visualization, so that you can insert it to another place within the project, or into a completely different project.
Download items as CSV	Download up to 50,000 dimension items for the selected dimension as a CSV.
Download data as CSV	Download visualization data source as a CSV.
Duplicate Visualization	Makes an exact duplicate of the current visualization, which you can then modify.
Edit Description	Add (or edit) a text description for the visualization.
Get Visualization Link	Lets you direct someone to a specific visualization within a project. When the link is clicked, the recipient will be required to login before being directed to the exact visualization linked to.
Start Over	(Works for Flow, Venn, Histogram) Deletes the configuration for the current visualization so you can re-configure it from scratch.

Create Visual icon

If you are not sure which visualization to pick, click the **Create Visual** icon in any table row (available on hover). This is the fastest way to add a visualization. Clicking it prompts Analysis Workspace to take an educated guess at which visualization would best fit your data. For example, if you have 1 row selected, it will create a trended line graph. If you have 3 segment rows selected, it will create a Venn diagram.

Occurrences	
Page	2,208,556
Page: 1 / 188 > Rows: 50 1-50 of 9,392 Nov 1 Nov 30 ↓	out of 2,951,317
1. home	185,103 8.4%
2. category 5 	79,067 3.6%
3. category 2	72,313 3.3%
4. category 4	72,246 3.3%
5. articles	70,760 3.2%

Change the scale axis on visualizations

[Here](#) is a video overview.

Additional Resources on Visualization:

- [Manage data sources](#)
- [Freeform table](#)
 - [Freeform table](#)
 - [Column and row settings](#)
 - [Column settings](#)
 - [Row settings](#)
 - [Dynamic vs. Static items](#)
 - [Filter and sort tables](#)
 - [Workspace Totals](#)
- [Cohort Table](#)
 - [What is Cohort Analysis?](#)
 - [Configure a Cohort Analysis report](#)
 - [Cohort Analysis use cases](#)
- [Fallout](#)
 - [Fallout overview](#)
 - [Configure a fallout visualization](#)
 - [Multi-dimensional fallout](#)
 - [Apply segments in fallout analysis](#)

[Section 2.5 Intelligent Alerts Overview | Adobe Analytics](#)

Intelligent Alerts provide enhanced control over alerting by integrating anomaly detection with the alert system.

Watch this video tutorial on [Intelligent Alerts](#) (5:34).

Overview

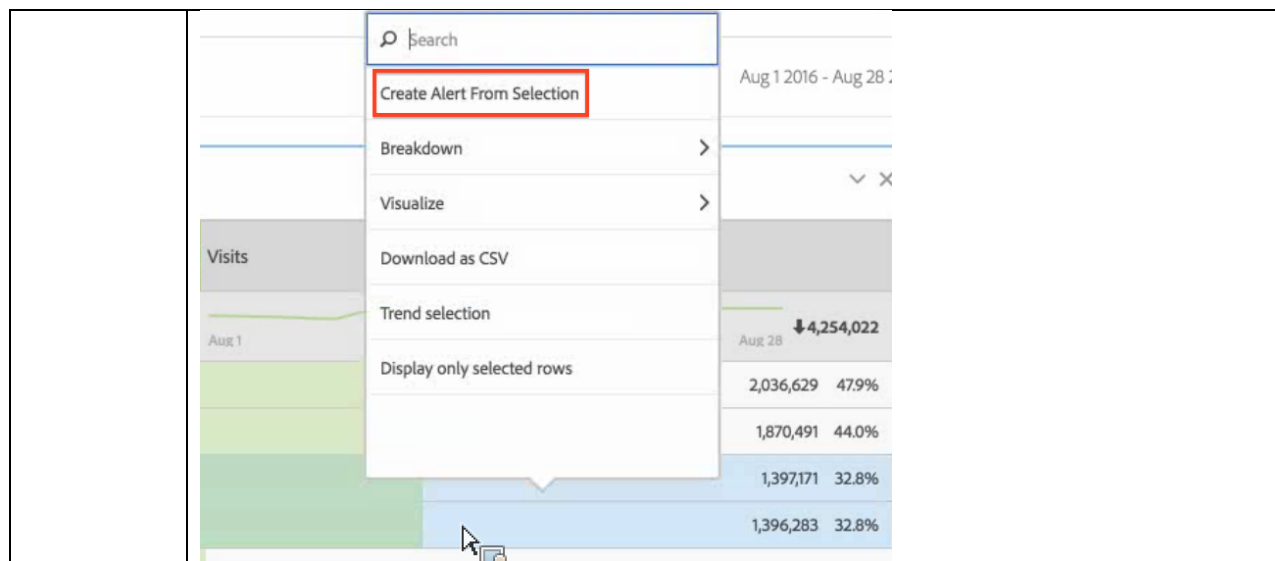
The new Alert Builder and Alert Manager in Analysis Workspace replace the existing alert functionality in Reports & Analytics. With Intelligent Alerts, you can:

Feature	Description
Build alerts based on anomalies	Set alerts based on anomaly thresholds (90%, 95%, 99%, 99.75%, and 99.9%), percentage change, or above/below values.
Preview alert triggers	View how often an alert is likely to trigger before setting it up.
Send alerts via email or SMS with auto-generated Workspace projects	Receive alerts through email or SMS along with links to automatically generated Analysis Workspace projects.
Create "stacked" alerts	Combine multiple metrics within a single alert for comprehensive monitoring.

Accessing the Alert Builder

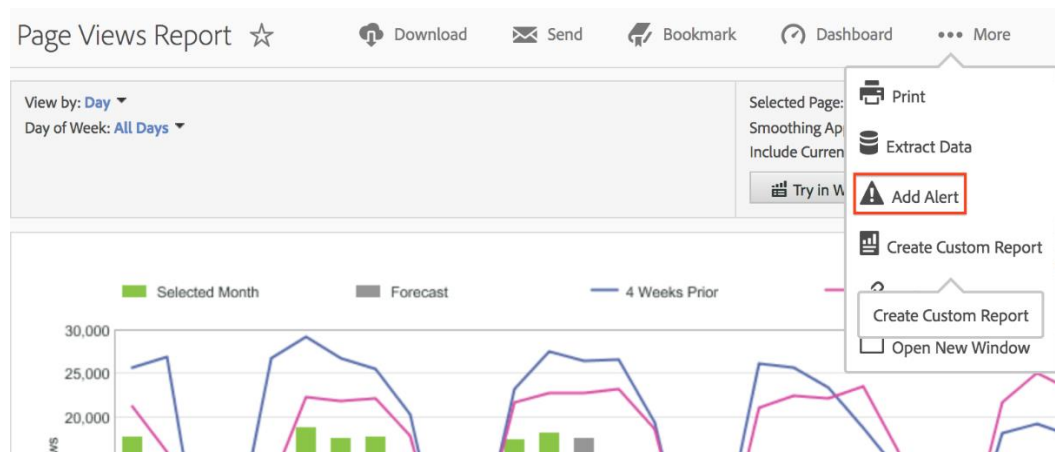
There are four ways to access the Alert Builder:

Method	Details
Go directly to the Alert Builder	Path: Components > Alerts
Use the Workspace keyboard shortcut	Windows: Ctrl + Shift + A Mac: Cmd + Shift + A
Select one or more freeform table line items	Right-click on the selected line item/s and choose "Create Alert from Selection." The Alert Builder will open, and relevant metrics and filters from the table will be pre-populated. You can edit the alert as needed. Create alert from selection.



From within a Reports & Analytics report

In the report, go to More > Add Alert. The Alert Builder will open, and relevant metrics and filters from the report will be pre-populated. You can edit the alert as needed.



The percent thresholds used are equivalent to standard deviations. For example, 95% corresponds to 2 standard deviations, and 99% corresponds to 3 standard deviations. The choice of time granularity impacts how the [system calculates](#) the distance (number of standard deviations) each data point is from the norm. Lower thresholds, such as 90%, result in more anomalies, while higher thresholds, like 99.75%, yield fewer anomalies.

IMPORTANT

Using timestamped data to create alerts may cause alerts to trigger incorrectly. Adobe recommends using non-timestamped data for Intelligent Alerts.

Anomaly Lookback for Alerts

The training period for alerts with anomaly detection varies based on the chosen granularity:

- Monthly granularity: 15 months + same range last year
- Weekly granularity: 15 weeks + same range last year
- Daily granularity: 35 days + same range last year
- Hourly granularity: 336 hours

For more information, refer to [Statistical techniques used in Anomaly Detection](#).

Additional Resources:

- [Alert Builder](#)
- [Alert Manager](#)
- [Intelligent Alerts - use cases](#)
- [User preferences](#)