

Module 4 – General tool knowledge and troubleshooting

This toolkit is designed for Expert Business Practitioner Exam Aspirants. There are five Modules. Study Each module per week to stick to schedule. Technical Parts of applications are depicted in Videos, you can learn more about them from experience League. You can visit [Get prep](#) page to understand the contents and anticipate the learning journey.

This is Expert Exam, Business Practitioner toolkit Module 4. This module contains two sections.

1. [Analytics Tools Guide](#)
2. [Analysis Workspace Overview](#)

Section 4.1 Analytics Tools Guide

The Analytics Tools Guide includes information about product features, use cases, task instructions, and best practices for the following Analytics tools:

Tool	Description
Analysis Workspace	Analysis Workspace is a flexible browser tool that allows you to quickly build analyses and share insights. Using the drag-and-drop interface, you can craft your analysis, add visualizations to bring data to life, curate a dataset, share and schedule projects with anyone in your organization. Discussed at length in Section 4.2 of this toolkit
Analytics dashboards	Analytics dashboards and their mobile scorecards allow executive users to view a broad rendering of important summary data quickly and easily on their own mobile devices. Curators add visualizations to mobile scorecard projects and share them with executives. Scorecards provide a way to target and measure KPIs and provide a clear indication of how well organizations are working to achieve their targets. Additional Detailed Resource: <ul style="list-style-type: none">• Adobe Analytics dashboards - Overview• Curator intro• Create a mobile scorecard• Set up executives to use dashboards• Executive user quick start guide
Activity Map	Activity Map is an Adobe Analytics application that is designed to rank link activity using visual overlays and provide a dashboard of real-time analytics to monitor audience engagement of your web pages. Activity Map lets you set up different views to visually identify the acceleration of customer activity, quantify marketing initiatives, and act on audience needs and behaviors." Additional Detailed Resources: <ul style="list-style-type: none">• Activity Map overview• Get started

	<ul style="list-style-type: none"> ○ Get started for admins <ul style="list-style-type: none"> ▪ Enable Activity Map ▪ Implement Activity Map ○ Get started for users <ul style="list-style-type: none"> ▪ Install Activity Map browser plug-ins ▪ Launch Activity Map • Robust link tracking • Link tracking <ul style="list-style-type: none"> ○ Link tracking methodology ○ Link tracking FAQ ○ Differentiate links that reference the same Link ID and region ○ Stop link tracking ○ Use the s.tl() function • Standard Mode vs. Live Mode • Links report • Page details • Complete set of metrics • Real-time (Live) page analytics • Customer segmentation • Customizable overlays • Overlay details • Export to CSV file • Supported systems and requirements • Activity Map FAQ • Configure Activity Map settings • Activity Map user interface • Activity Map reporting in Analytics • Troubleshoot browser extension • Troubleshoot data collection
<p>Report Builder</p>	<p>Report Builder is an add-in for Microsoft Excel. Report Builder lets you build customized requests from Adobe Analytics data that are inserted into your Excel worksheets. Requests can dynamically reference cells within your worksheet, and you can update and customize how Report Builder presents the data.</p> <p>Additional detailed resources:</p> <ul style="list-style-type: none"> • Adobe Report Builder help • Report Builder setup <ul style="list-style-type: none"> ○ System requirements ○ Install Report Builder ○ Upgrade Report Builder ○ Report Builder Sign-In ○ Uninstall Report Builder ○ Invoke Report Builder functionality from Microsoft Excel functions • Report Builder toolbar • Data requests <ul style="list-style-type: none"> ○ Data requests - Request Wizard Step 1 ○ Create a data request

- [Report suites](#)
 - [Select a report suite](#)
 - [Select a report suite from an existing request in Excel](#)
 - [Use Excel to locate a report suite ID](#)
- [Manage segments](#)
- [Report types](#)
 - [Report types overview](#)
 - [Path and path fallout reports in Report Builder](#)
 - [Filter a Path Report Using the Request Wizard](#)
 - [Filter a Fallout Report Using the Request Wizard](#)
 - [Filter Path Reports by Adding Dependent Requests](#)
 - [Select a report type](#)
- [Import bookmarked reports and dashboard reportlets](#)
- [Date ranges](#)
 - [Request Wizard definitions - preset dates](#)
 - [Fixed dates and saved date ranges](#)
 - [Request Wizard definitions - fixed dates](#)
 - [Rolling dates](#)
 - [Request Wizard definitions - rolling dates](#)
 - [Real-time reports](#)
 - [Configure a real-time request](#)
 - [Customized date expressions](#)
 - [Customized date expressions - overview](#)
 - [Date abbreviations](#)
 - [Individual starting or ending dates](#)
 - [Examples of date ranges using customized expressions](#)
 - [Considerations](#)
 - [Dates from a cell](#)
 - [Granularity](#)
 - [Custom calendar](#)
- [Interactive controls](#)
- [Layout - Request Wizard Step 2](#)
 - [Layout overview](#)
 - [Metrics and dimensions](#)
 - [Metrics and dimensions overview](#)
 - [Add metrics and dimensions](#)
 - [Calculated Metrics](#)
 - [Combine traffic and commerce metrics in the same request](#)
 - [User access permissions for dimensions and metrics](#)
 - [Modify metrics - field definitions](#)
 - [Customer attributes](#)
 - [Anomaly Detection](#)
 - [Configure an anomaly detection request](#)
 - [Format the date](#)
 - [Format display headers](#)
 - [Hide or show headers](#)
 - [Delete output mapping](#)
 - [Name a request](#)
 - [Prepend and postpend text to cells](#)
 - [Configure the custom layout](#)
 - [Map metrics and dimensions to cells](#)

	<ul style="list-style-type: none"> • Create a microchart • Filter dimensions <ul style="list-style-type: none"> ○ Filter dimensions overview ○ Most popular filtering ○ Specific filters ○ Saved filters • Manage requests • Manage requests - definitions • Diagnostic messages • Sort ascending or descending • Protected worksheet elements • Edit multiple requests • Edit metrics across multiple requests • Refresh a request • Refresh requests for all sheets • Add dependent requests • Classification • Copy requests <ul style="list-style-type: none"> ○ Copy requests overview ○ Copy simple requests ○ Copy adjacent requests ○ Copy worksheets ○ Copy requests and worksheets between workbooks ○ Create more than one copy of a request ○ Copy referential requests • Save a workbook with requests • Specify conditional formatting • Offline mode for creating and editing requests • Report Builder options • Schedule report requests • Schedule a workbook • Scheduled Task Manager • Workbook Library <ul style="list-style-type: none"> ○ Upload a workbook ○ Download a workbook ○ Lock/unlock workbooks ○ Schedule macro-enabled workbooks • Publish to Power BI with Report Builder 5.5 <ul style="list-style-type: none"> ○ Publish to Power BI - Overview ○ Limitations and specifications ○ Manually import data to Power BI ○ Pull published assets into Power BI Desktop ○ Best practices ○ Troubleshooting Power BI integration ○ Adobe Analytics content packs for Power BI • Visual Basic macros • Report Builder troubleshooting • Report Builder FAQ
Analytics	Analytics APIs allow you to directly call Adobe’s servers to perform almost any action

APIs

that you can perform in the user interface. You can create reports to explore, get insights, or answer important questions about your data. You can also manage components of Adobe Analytics, such as the creation of segments or calculated metrics.

Documentation for the Adobe Analytics APIs are on [Adobe Developer](#).

Comparison of Analytics APIs

API Type	Fully Processed	Real-Time	Livestream	Data Warehouse
Description	Fully-processed, finalized data that is available in all Analytics interfaces.	Partially-processed, limited metrics available within seconds of collection.	Partially-processed hit data available within seconds of collection.	Fully-processed, finalized data that is used for pulling large data exports.
Latency	30-90 minutes	Seconds - 10 minutes	Seconds - 10 minutes	90+ minutes
Processing Completion	Full	Partial	Partial	Full
Reporting Interfaces	Analysis Workspace, Reports & Analytics, Report Builder, API	Real-Time report in Reports & Analytics, Report Builder, 1.4 API	API only	Data Warehouse, API
Data granularity	Summarized	Summarized	Hit level	Summarized
Visitor Profile processing	Yes	No	No	Yes
Segment support	Yes	No	No	Partial

Reports & Analytics

Reports & Analytics is a tool with dozens of pre-built reports and visualizations. These are now available within Analysis Workspace. **Effective December 31, 2023, Adobe intends to discontinue Reports & Analytics and its accompanying reports and features. Adobe recommends using Analysis Workspace for most reporting needs.** For additional information, see [Analysis Workspace](#).

Additional Resources here:

- [Getting started with Reports and Analytics](#)
- [Overview of the reporting interface](#)
 - [About Data Collection](#)
 - [Reports Menu](#)

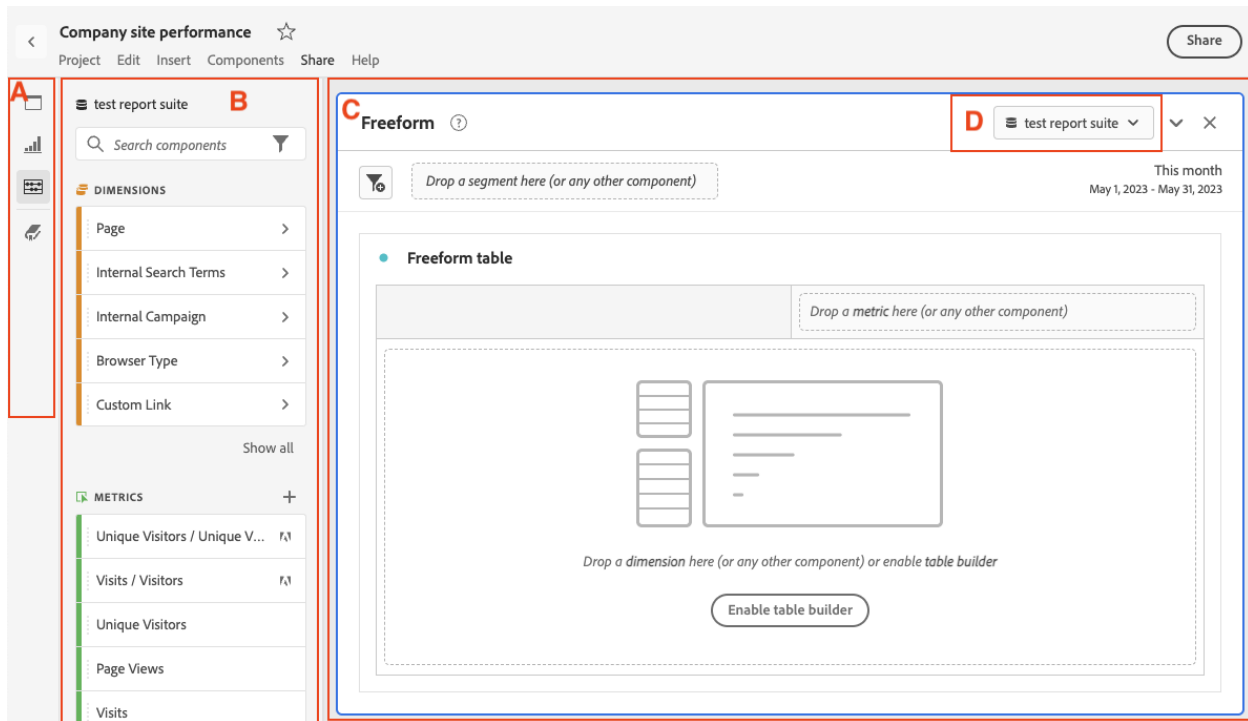
- [Report Features](#)
- [Common Terms](#)
- [Report display settings and navigation](#)
- [Report schedule and distribution](#)
- [End-of-life notice for scheduled reports](#)
- [Report types](#)
- [Run different report types](#)
- [Customize reports](#)
 - [Customize reports overview](#)
 - [Change 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](#)

Section 4.2 Analysis Workspace Overview

Analysis Workspace allows you to quickly build analyses to gather insights and then share those insights with others. Using the drag-and-drop browser interface, you can craft your analysis, add visualizations to bring data to life, curate a dataset, and share and schedule projects with anyone you choose.

Areas of Analysis Workspace

The following image and accompanying table explain some of the main areas in Analysis Workspace:



Location in image	Name and function
A	Far left rail: Contains tabs for adding panels, visualizations, and components to Analysis Workspace. Also contains the Data Dictionary icon that is used to open the Data Dictionary.
B	Left rail: Depending on which tab is selected in the far left rail, this area contains individual panels, visualizations, or components.
C	Canvas: This is the main area where you drag content from the left rails to build your project. The project dynamically updates as you add panels, visualizations, and components to the canvas.
D	Report suite drop-down menu: For each panel in Analysis Workspace, the report suite drop-down menu allows you to choose the report suite that you want to use as your data

source.

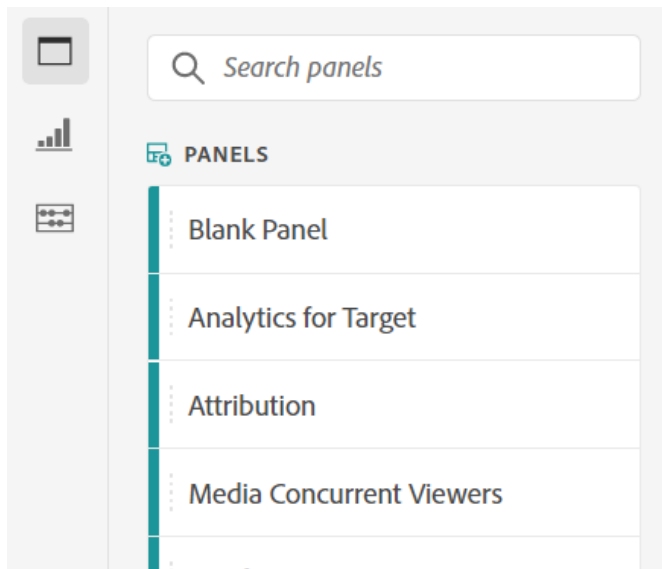
4.2.1 Features in Analysis Workspace

Following are some of the key features available in Analysis Workspace:

4.2.1.a Panels

Panels are used to organize your analysis within a project and can contain many tables & visualizations. Many of the panels provided in Analysis Workspace generate a full set of analyses based on a few user inputs. On the far left rail, select the top **Panels** icon to see a full list of panels available.

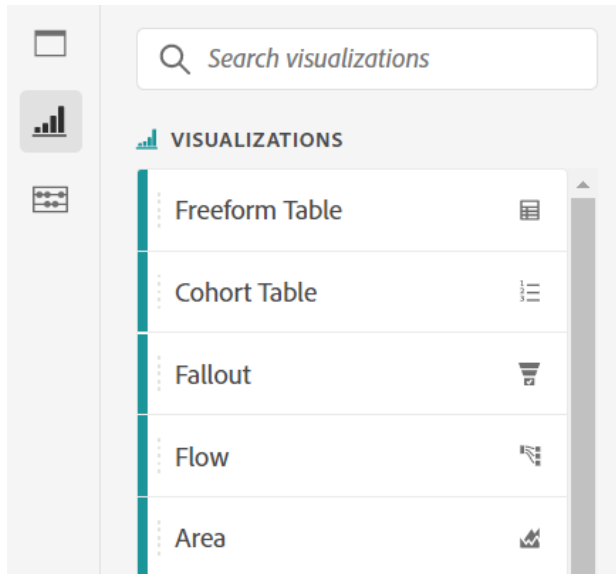
To learn more about panels, see [Panels overview](#).



4.2.1.b Visualizations

Visualizations, such as a bar or line chart, can be used to visually bring data to life. On the far left rail, select the middle **Visualizations** icon to see the full list of visualizations available.

To learn more about visualizations, see [Visualizations overview](#).



4.2.1.c Components

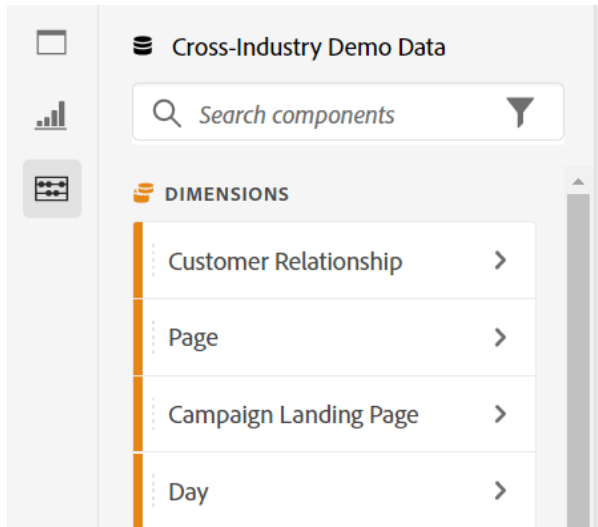
Components in Analysis Workspace consist of the following:

- Dimensions
- Metrics
- Segments
- Date ranges

To learn more about each of these component types, see [Components overview](#).

Each of these component types can be added to a visualization (such as a Freeform table) to start answering your business questions.

After you understand component terminology, you can drag components into visualizations (including Freeform tables) to [build your analysis](#).



4.2.1.d Data Dictionary

The Data Dictionary in Analysis Workspace helps both users and administrators keep track of and better understand the components in their Analytics environment.

To learn more about the Data Dictionary, see [Data Dictionary overview](#).

4.2.1.d Data Sources

Synchronizing visualizations lets you control which data table or data source corresponds to a visualization. Here is more information on how you can [manage data sources](#).

4.2.2 Start using Analysis Workspace

4.2.2.a Log in to Adobe Analytics

To start using Analysis Workspace, log in to Adobe Analytics by going to experience.adobe.com/analytics. The Projects page of Analysis Workspace is shown by default. If a specific project has been selected for you, that project is shown by default.

4.2.2.b Create a project

An analysis in Analysis Workspace is referred to as a [project](#).

You can create a project in Analysis Workspace as described in [Create projects](#).

Projects can be organized into folders and subfolders, as described in [Folders in Analysis Workspace](#).

4.2.2.c Save and share a project

As you create an analysis in Analysis Workspace, your work is [automatically saved](#).

When you finish building out the project and it's gathering actionable insights, the project is ready to be consumed by others. You can share the project with users and groups in your organization, or even with people outside your organization. For information about sharing a project, see [Share projects](#).

Extra help docs:

- Adobe offers hundreds of [Analytics video training tutorials](#).
- See [Adobe Experience Cloud release notes](#) for updates about new features.
- A great way to become acquainted with Analysis Workspace is through the Analysis Workspace Training Tutorial template. This template walks you through common terminology and steps for building your first analysis in Workspace. To begin the tutorial:
 1. On the **Workspace** tab in Adobe Analytics, select **Learning** on the left.
 2. Select **Open**

Tutorial.

Welcome to Analysis Workspace!

In this tutorial, we will walk you through common terminology and steps for building your first analysis. By the end of the tutorial, you will be able to Build a freeform table to analyze your top content, Visualize your data in a bar graph, Curate & Share your analysis with others, and Analyze customer journeys more deeply using Flow, Fallout, Cohort, and Map visualizations.

Key Terminology:

- This tutorial is an Analysis Workspace project. Within a project, panels are used to organize your analysis. A panel will contain many tables & visualizations.
- Components are the building blocks for any Analysis Workspace project. Throughout the tutorial, you will learn about 4 component types: Dimensions, Metrics, Segments, and Date Ranges.

Know Before You Go:

- Keep in mind that this tutorial project is local to your username; any saved changes will only appear for you. Don't worry about breaking anything.
- If you make a mistake, hit Ctrl (Cmd on Mac) + Z on your keyboard to undo your last action.
- If you get stuck along the way, or just want to validate that you are taking the right actions, refer to the Answer Key at any time.

Have fun learning how to use Analysis Workspace to answer your business questions!

Drop a Segment here (or any other component)

Last month
Aug 1, 2020 - Aug 31, 2020

• Step 1: Analyze a dimension

Dimensions are text attributes that describe your visitor behavior. They can be viewed, broken down, and compared in your analysis. Examples include: Pages, Marketing Channels, Devices, Products

• Step 1: Instructions

Business Question: You want to understand what pages are accessed the most on your

• Step 1

Learn Company Type

Additional Detailed Resource (**Very Important**):

- [Analysis Workspace overview](#)
- [What's New in Analysis Workspace](#)
- [Projects](#)
 - [Projects overview](#)
 - [Create projects](#)
 - [Save projects](#)
 - [Folders in Workspace](#)
 - [About Folders in Workspace](#)
 - [Create Folders and Subfolders](#)
 - [Delete Folders](#)
 - [Add Projects](#)
 - [Remove a Project](#)
 - [Save a New Project](#)
- [Templates](#)
- [Multiple report suites](#)
- [Hotkeys \(Shortcuts\)](#)
- [Color Palettes](#)

- [View Density](#)
- [Components](#)
 - [Components overview](#)
 - [Add component descriptions](#)
 - [Annotations](#)
 - [Annotations overview](#)
 - [Create annotations](#)
 - [Manage annotations](#)
 - [View annotations](#)
 - [Mobile annotations](#)
 - [Dimensions](#)
 - [Preview dimensions](#)
 - [Break down dimensions](#)
 - [Time-parting dimensions](#)
 - [Metrics](#)
 - [Segments](#)
 - [Create segments](#)
 - [Quick segments](#)
 - [Calendar and date ranges](#)
 - [Calendar and date ranges overview](#)
 - [Create custom date ranges](#)
 - [Date comparison](#)
 - [Data Dictionary](#)
 - [Data Dictionary overview](#)
 - [View component information in the Data Dictionary](#)
 - [Edit component entries in the Data Dictionary](#)
 - [Monitor Data Dictionary health](#)
- [Visualizations](#)
 - [Visualizations overview](#)
 - [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](#)
 - [Flow](#)
 - [Flow overview](#)
 - [Configure a flow visualization](#)
 - [Inter-dimensional flows](#)

- [Area and area stacked](#)
- [Bar and bar stacked](#)
- [Bullet graph](#)
- [Combo chart](#)
- [Donut](#)
- [Histogram](#)
- [Horizontal Bar and Horizontal Bar Stacked](#)
- [Key metric summary](#)
- [Line](#)
- [Map](#)
- [Scatterplot](#)
- [Summary Number and Summary Change](#)
- [Text](#)
- [Tree map](#)
- [Venn](#)
- [Panels](#)
 - [Panels overview](#)
 - [Analytics for Target \(A4T\) panel](#)
 - [Attribution panel](#)
 - [Blank panel](#)
 - [Freeform panel](#)
 - [Media Average Minute Audience panel](#)
 - [Media Concurrent Viewers panel](#)
 - [Media Playback Time Spent](#)
 - [Overview](#)
 - [Input and Output Settings](#)
 - [FAQs](#)
 - [Next or previous item panel](#)
 - [Page summary panel](#)
 - [Quick Insights panel](#)
 - [Segment comparison panel](#)
 - [Segment comparison overview](#)
 - [Segment comparison use cases](#)
 - [Statistical tests used in segment comparison](#)
- [Curate, Share, and Schedule projects](#)
 - [Share menu](#)
 - [Curate projects](#)
 - [Share projects](#)
 - [Create shareable links](#)
 - [View-only projects](#)
 - [Download PDF or CSV files](#)
 - [Schedule projects](#)
- [Attribution IQ](#)
 - [Attribution overview](#)
 - [Attribution models and lookback windows](#)
 - [Algorithmic attribution](#)
 - [Attribution best practices](#)
 - [FAQ](#)
- [Journey IQ](#)
- [Segment IQ](#)
- [Virtual Analyst](#)

- [Virtual Analyst overview](#)
- [Anomaly Detection](#)
 - [Anomaly Detection overview](#)
 - [View anomalies in Analysis Workspace](#)
 - [Turn off anomaly detection](#)
 - [Statistical techniques used in anomaly detection](#)
- [Contribution Analysis](#)
 - [Contribution Analysis overview](#)
 - [Run Contribution Analysis](#)
 - [Statistical techniques used in Contribution Analysis](#)
- [Intelligent Alerts](#)
 - [Intelligent Alerts overview](#)
 - [Alert Builder](#)
 - [Alert Manager](#)
 - [Intelligent Alerts - use cases](#)
- [User preferences](#)
- [Workspace FAQs](#)
 - [Frequently asked questions](#)
 - [Optimize Analysis Workspace performance](#)
 - [Error messages](#)
 - [Analysis Workspace limitations](#)
 - [Administration requirements](#)
 - [Accessibility in Analysis Workspace](#)