



Analytics Dashboards User Guide

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Viewing Analytics and Dashboards

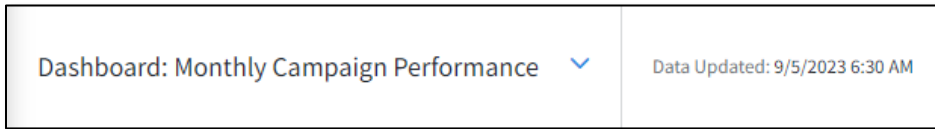
A dashboard is a collection of data visualizations, or widgets, that provide intelligence about the underlying data models available via the analytics feature. To access the dashboards:

1. Log in to Total Expert.



2. Switch to the Marketing Admin account.
3. Navigate to **Reporting & Analytics** → **Analytics**.
4. The default Campaign Performance dashboard appears.

All dashboards share a common header where users can select the dashboard to view. The time stamp reflects when the data represented in the dashboard was last updated. Data is refreshed daily.



Below this is a menu bar for the current dashboard, where you can apply filters to the dashboard, download the dashboard, or duplicate the existing dashboard to create a new, editable dashboard.

Tip

Dashboards provided by TE cannot be edited.

Note

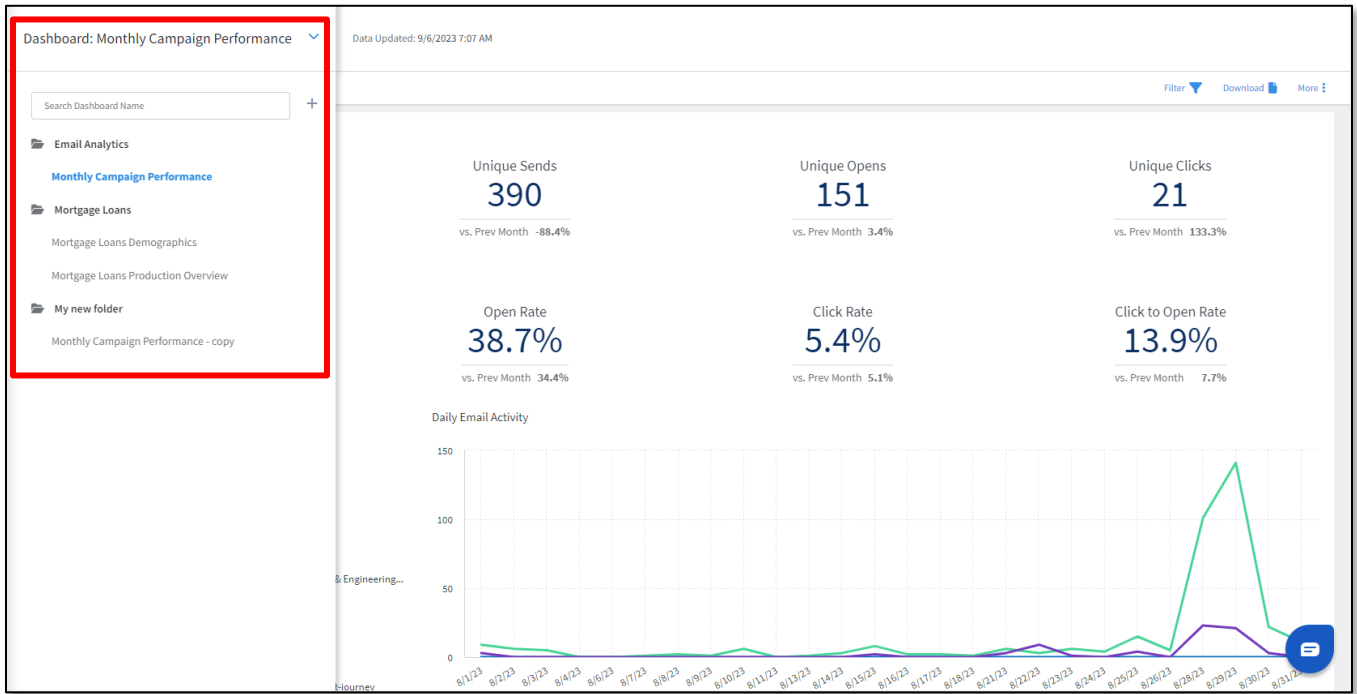
The data shown in your dashboards before any filters are applied depends on your access level. Administrators see data for the entire organization, while non-administrative users see data for their own activity only.

Navigating Between Dashboards

Total Expert provides some out-of-the-box dashboards. In addition, users may have duplicated and/or shared dashboards available. The available dashboards are listed in the dashboards panel.

To navigate between dashboards:

1. Click the dashboard title to open the dashboards panel.
2. Expand the data model folder (for example, Email Analytics or Mortgage Loans) and select the dashboard you want to view.



Note

Custom dashboards appear at the end of the folder list.

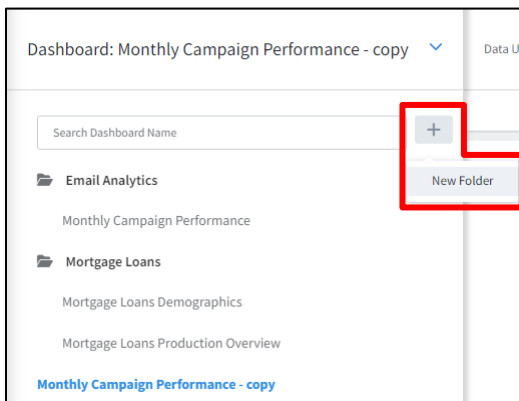
Organizing Dashboards

Creating Folders

You can organize your dashboards into folders and subfolders to improve how you navigate the dashboards panel.

To create a folder:

1. Click the name of the current dashboard in the upper-left corner of the page to open the dashboards panel.
2. Select **[+] → New Folder**.



3. In the New Folder box, enter a name for the new folder and click the **Save & Continue button**.



Note

You can create a subfolder by selecting **New Folder** from the new folder's menu.

Moving Dashboards into Folders

You can move a dashboard you have permission to move from one folder to another:

1. Click the name of the current dashboard in the upper-left corner of the page to open the dashboards panel.
2. Select [:] → **Move** for the dashboard you want to move.
3. In the Move Dashboard box, click the name of the folder where you want to place the dashboard and click the **Move To Select Folder** button.

Note

The Move To Selected Folder button is disabled if you select the folder where the dashboard is currently stored.

Deleting Dashboards

Warning

Once a dashboard has been deleted, it cannot be recovered.

There are 2 ways to delete a dashboard:

- From the dashboard panel, locate the dashboard in the list and select [:] → **Delete**.
- With the dashboard you want to delete already open, select **More [:] → Delete Dashboard** from the dashboard's menu bar.

Sharing Dashboards

A dashboard owner (the user who created a dashboard) and administrators can share their dashboards with other users (shared users).

When you share a dashboard, you create a link between your dashboard and the shared dashboard. This way, you can make changes to your dashboard and republish it so that the people you share it with can see your changes.

To share a dashboard:

1. In the heading of your dashboard, click the **Share** button.
2. In the Share Dashboard box:
 - a. In the **Add Users** drop-down list, select the users with whom you want to share the dashboard. You can type part of their name to filter the list. Each name you select appears in the field and can be deselected by clicking the **x** next to the name.
 - b. Users who had previously been granted access are listed in the Access section. Click the red **x** icon to remove access for a given user.
 - c. Click the **Save** button to apply your changes.


Note

When you share a dashboard with a user, they will be able to select it from the dashboards panel in a folder called Shared With Me.

The shared user cannot make changes to the dashboard; however, they can duplicate it and modify the copy for their own purposes. Their duplicate is not tied to the shared dashboard or your original in any fashion.

Warning

Removing a user's name from the Access section removes their access to the dashboard; they will no longer be able to access that dashboard in their Shared With Me folder.

Republishing Dashboards

When a dashboard owner modifies a dashboard, it is not automatically updated for shared users. The owner of a dashboard must republish the modified dashboard, which updates the shared users' dashboards. Shared users must refresh the shared dashboard before any of the owner's changes are applied.

When you make changes to a dashboard that has been shared with at least one other user, then switch back to View mode, an Unpublished Changes label appears at the top of the page with a Republish link.

To republish the dashboard, click **Republish**. In the confirmation box, click the Republish button.

Note

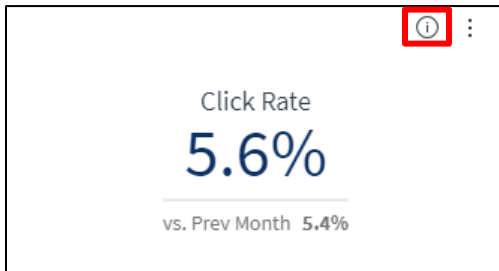
You can check the **Don't show this message again** box before republishing to skip the confirmation box in the future.



Viewing Widgets

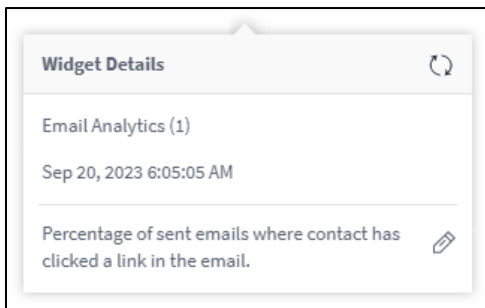
A widget is an individual visualization on the dashboard. A dashboard is a combination of widgets.

Each widget displays some specific data from the data model. This might be the value of a single metric or a combination as in a pie chart or line graph. Hover the mouse pointer over any widget to reveal an information icon (ⓘ) in its upper-right corner.



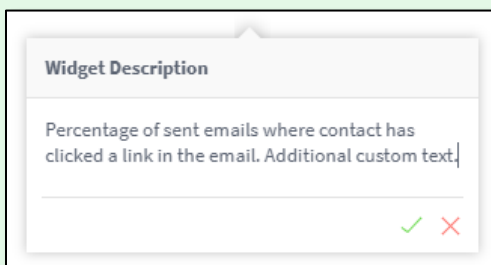
Click this icon to open an information panel about the widget. This includes:

- The data model the widget is drawing from.
- The date and time of the last update for the data displayed in the widget.
- A text description of the data displayed in the widget.



Tip

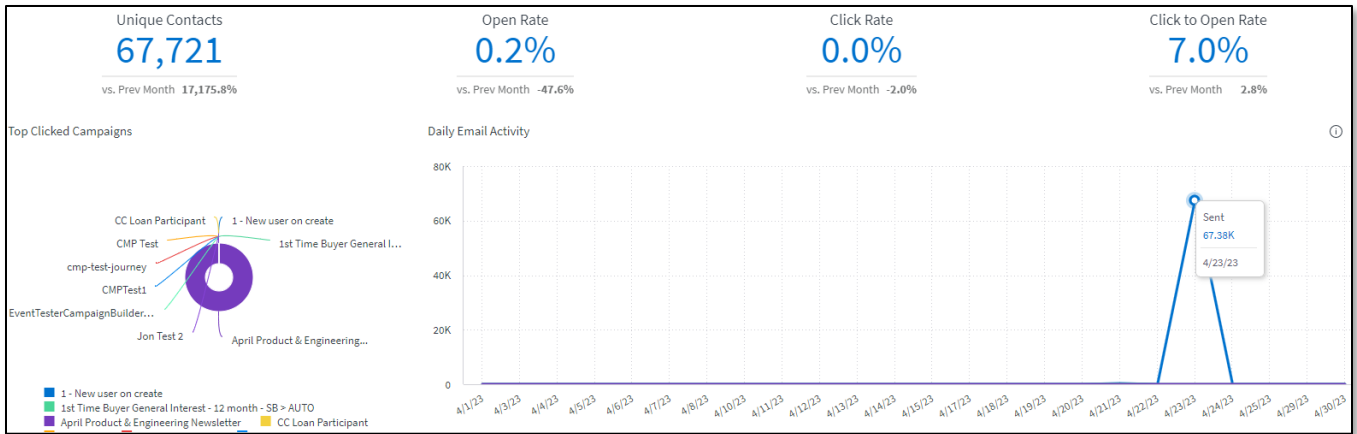
On dashboards where you have editing privileges, you can click the pencil icon in the description area to customize the description text for the widget. (On dashboards where you do not have editing privileges, this icon is not shown.) When you have finished making changes, click the check mark icon to save your changes.



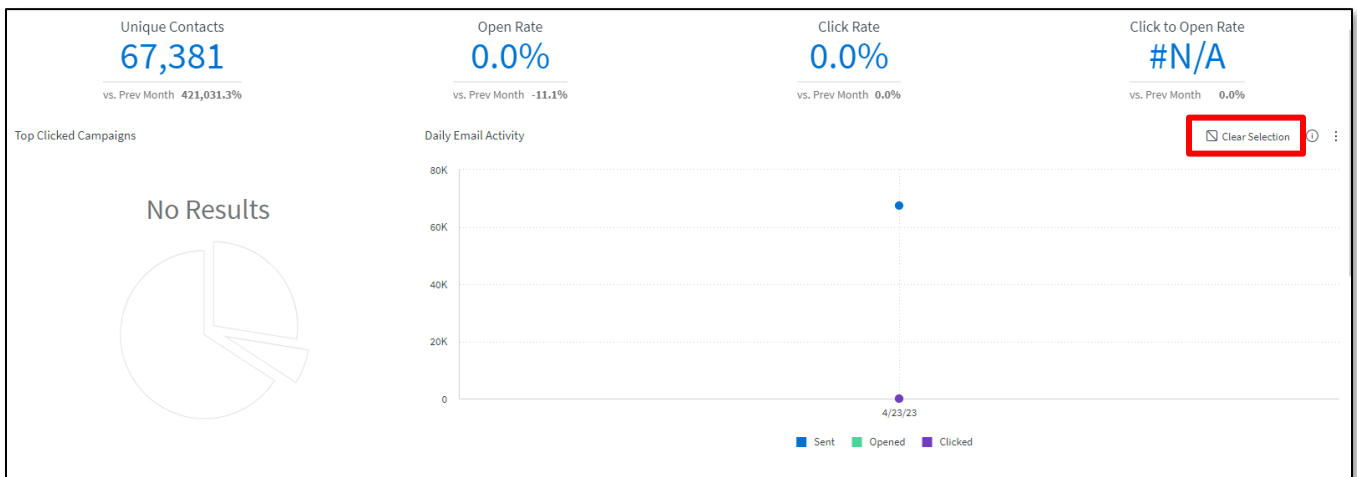
Selecting a data point on some widgets changes other widgets on the dashboard to reflect only the data related to the selected data point (see the before and after images below). Click the **Clear Selection** button on the selected widget to return to the default dashboard settings.



Before



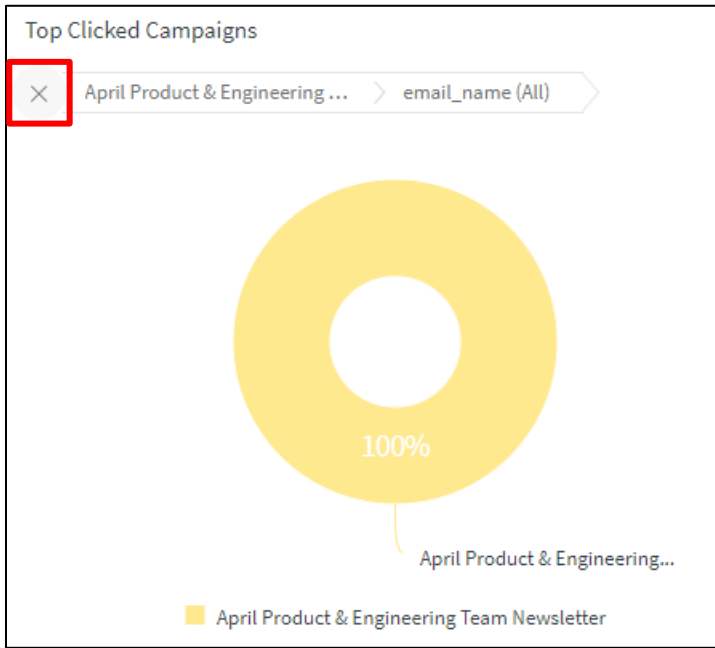
After



Drilling Down on Widgets

Some widgets support drilling down into a deeper level of data underlying the widget summary. To drill down on a widget, right-click on a line item, bar, donut wedge, or line graph and select the data point you want to use for the drill down.

To return to the summary view, click the **X** next to the drilled down data point.

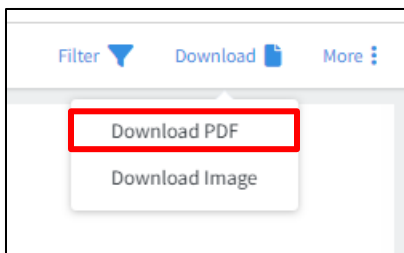


Downloading Dashboards and Widgets

Downloading a Dashboard as a PDF

When you need to take copies of your dashboards with you for meetings or sharing with others, you can generate a PDF report of your dashboard. Before you download your dashboard locally as a PDF, you can customize how your dashboard appears in the PDF.

1. In the upper-right corner of the dashboard, select **Download** → **Download PDF**.



2. In the PDF Report Settings box:
 - a. In the **Paper Size** section, select the appropriate option from the drop-down list.
 - b. In the **Orientation** section, select either **Portrait** (vertical) or **Landscape** (horizontal), depending on how you want the PDF to be oriented.
 - c. In the **Header** section, you can configure the information that appears at the top of each page in your PDF:
 - i. From the drop-down list, select the size of the header (**Compact**, **Medium**, or **Large**). Or select **No Header** if you don't want a header on any page.
 - ii. Select the **Title** option to include the dashboard's name at the beginning of the header.



- iii. Select the **Data As Of** option to include the time and date (in UTC) of the latest data refresh attempt (even if it failed).
 - iv. Select the **Dataset Name** option to include the data source.
 - v. Select the **Dashboard Filters** option to include a summary of the filters that were in place on the dashboard at the time the data was captured for the PDF.
 - d. In the **Footer** section, select whether or not you want the **Page Number** to appear at the bottom of each page.
 - e. The right side of the box contains a preview of the PDF to be exported, and it updates each time you modify the settings. In addition, click the toggle switch at the top of this section:
 - i. **Edit mode** – Set the size of your widgets by selecting and dragging the borders of each widget. These changes do not affect the actual dashboard.
 - ii. **View mode** – Preview how the dashboard will be displayed in the PDF.
 - f. (optional) Click the **Save** button to retain the current setup for exporting future PDFs.
 - g. Click the **Download** (down arrow) button to export a PDF using the current setup.
3. Use the file explorer window to name the downloaded PDF and save it to a known location.

Note

While the system allows creating dashboard names in a variety of languages, the file name of the exported file only includes English characters from the dashboard name. Any non-English characters in the dashboard name will not be included in the exported file name.

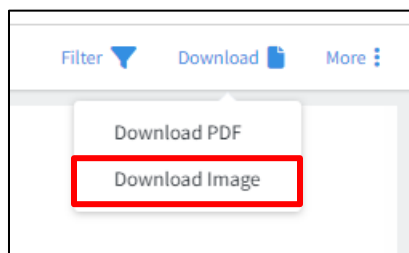
Warning

The more widgets there are on a dashboard, the longer it will take to export the dashboard. Treemap widgets are especially heavy on export resources. Multiple concurrent requests can also negatively affect performance.

Downloading a Dashboard as an Image

When you download the dashboard as an image, it downloads in its current state, showing the results of the filters applied to it. The dashboard image is downloaded in PNG format.

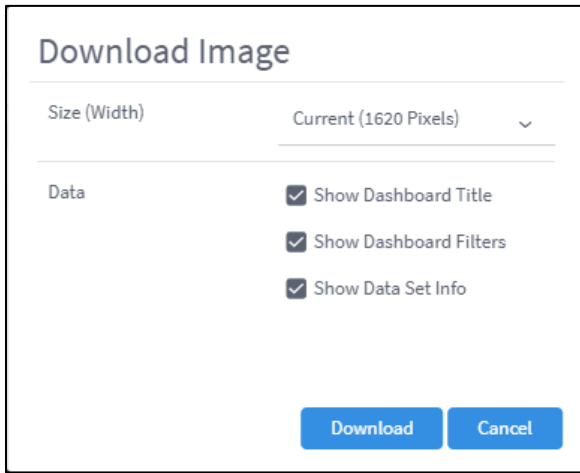
1. In the upper-right corner of the dashboard, select **Download → Download Image**.



2. In the Download Image box:
 - a. In the **Size (Width)** drop-down list, select the width, in pixels, of the exported image.
 - b. (optional) Select the **Show Dashboard Title** checkbox to include the dashboard name at the top of the image.
 - c. (optional) Select the **Show Dashboard Filters** checkbox to include a summary of the dashboard filter selections at the top of the image.



- d. (optional) Select the **Show Data Set Info** checkbox to include the data set name and last build time at the top of the image.
- e. Click the **Download** button.

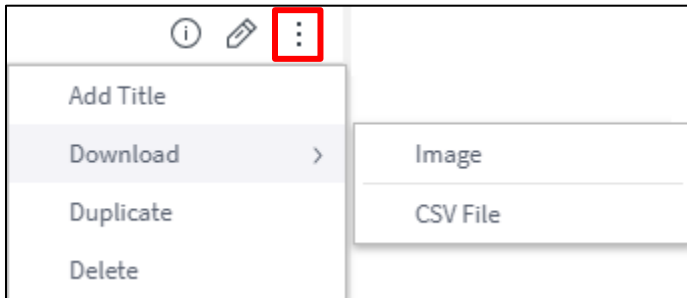


3. Use the file explorer window to name the downloaded image and save it to a known location.

Downloading a Widget

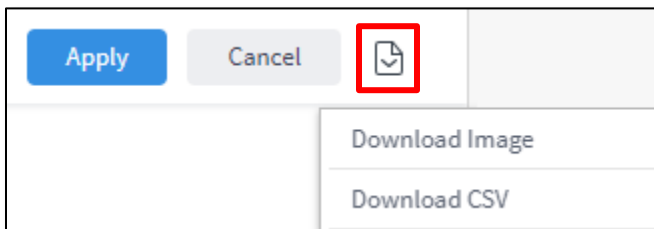
To download a widget from the dashboard view:

1. In the widget's header bar, select [:] → **Download**.
2. In the submenu, select the desired file type. The download options depend on the type of widget.



To download a widget from the widget editor:

1. Click the download icon.
2. Select the relevant file type. The download options depend on the type of widget.





Options for Different Widget Types

The available download options for each widget type are summarized in the table below.

Widget Type	Download as...			
	CSV	Excel	Image	PDF
Area Chart	✓		✓	
Area Map	✓		✓	
Bar Chart	✓		✓	
Box and Whisker Plot	✓		✓	
Calendar Heatmap	✓		✓	
Column Chart	✓		✓	
Funnel Chart	✓		✓	
Indicator	✓		✓	
Line Chart	✓		✓	
Pie Chart	✓		✓	
Pivot	✓	✓	✓	✓
Polar Chart	✓		✓	
Scatter Chart	✓		✓	
Scatter Map	✓		✓	
Sunburst	✓		✓	
Table	✓		✓	✓
Text	cannot be downloaded			
Treemap	✓		✓	

Download as:

- **CSV** – Download the data described by the widget to a CSV file. If you have applied any filters, only the filtered data is the data included in the file.
- **Excel** – Download the data described by the widget to an Excel file. The exported data is the data displayed in your widget. This means that any active filters, layout structure, and masks applied to your data are exported as well. For example, if you have modified how currency, percentages, or numbers are formatted in the widget, these are reflected in your exported Excel file. Exporting to Excel maintains your pivot’s layout and structure, and values such as subtotals, which are not maintained when you export a pivot table to CSV.
- **Image** – You can download a widget as an image in PNG format.

Tip

The image size will reflect the size of the widget on the screen when you download it. To create a larger image, enlarge the widget space in the dashboard, or open the widget in edit view.



- **PDF** – Download the widget as a PDF. For Table widgets, you can customize how your table is displayed in your PDF including the table’s orientation and page size. In the PDF Report Settings, the first 14 pages of your Pivot table are displayed in the preview window, however, when you export your Pivot table to PDF, the entire table is included, up to 1,000 rows on multiple pages. For more information, see Downloading a Dashboard as a PDF.

When downloading a PDF, you can apply the following settings:

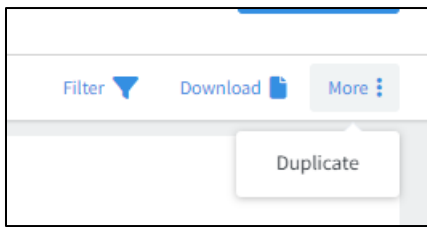
- paper size
- orientation (portrait or landscape)
- header
- footer (page number)

Duplicating Dashboards

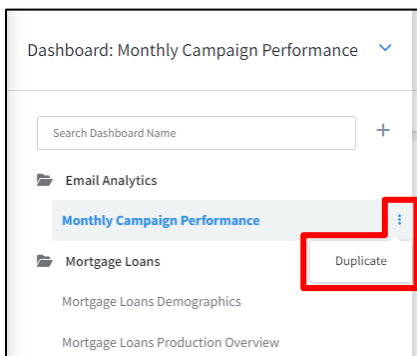
You cannot modify the default dashboard, but you can duplicate it and then modify the copy. Copying a dashboard (even one that was shared with you) creates a new copy of the dashboard with a different name. This new dashboard is separate from the original and you are its owner, meaning that you have full editing rights. The duplicate dashboard is placed in the root folder (not part of any existing user-level folder).

To copy a dashboard, either:

1. Select **More [:]** → **Duplicate** from the dashboard menu bar.



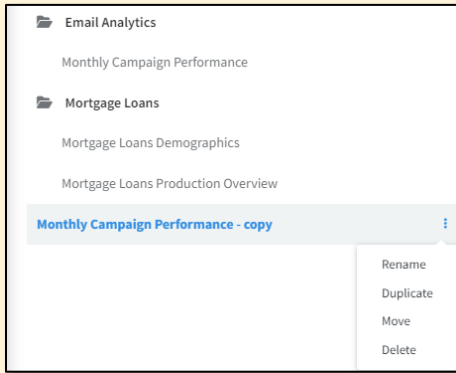
2. Open the dashboards panel and click the [:] button to the right of the name of the dashboard you want to copy and select **Duplicate** from the menu.





Note

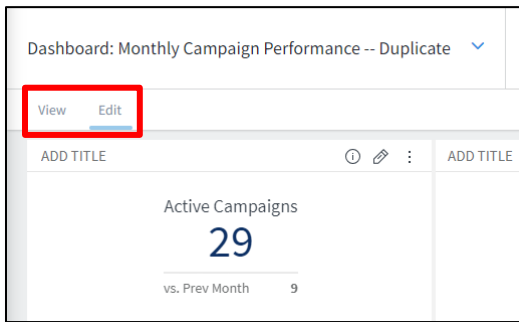
In the example shown above, the dashboard being duplicated is a system dashboard that cannot be edited. There are additional options available for the duplicate that you own.



Modifying Dashboards

View Mode and Edit Mode

A dashboard can be viewed in either View mode or in Edit mode. Click either the **View** or **Edit** tabs in the dashboard menu bar to switch between modes.



In View mode, the dashboard cannot be rearranged or edited. This is what a shared user would see when viewing this dashboard.

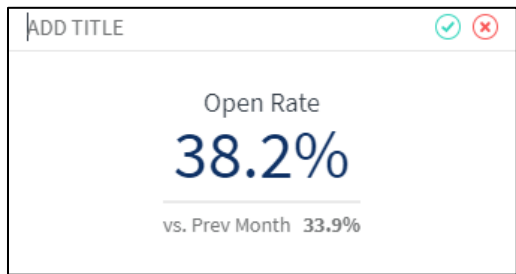
Edit mode allows you to make changes to the dashboard. Only the owner of a dashboard can edit it.

Customizing the Dashboard Layout

Adding Widget Titles

You can add or edit titles for your widgets directly in the dashboard view.

1. If you are in View mode, click the **Edit** tab to switch to Edit mode.
2. If no title has been given, click **ADD TITLE** in the widget's header bar. If a title has already been given, double-click the existing title.
3. Type the desired title for the widget in the text box.
4. Click the green check mark icon or press **[Enter]** to confirm your changes.



Moving a Widget on the Dashboard

To move a widget to a different column or position:

1. If you are in View mode, click the **Edit** tab to switch to Edit mode.
2. Click and hold the title bar of the widget you want to move.
3. Drag the widget to the desired position. Nearby widgets will automatically adjust size and shape to accommodate the new arrangement.

You can place widgets side-by-side by either:

- Putting each widget in a different column.
- Dragging one widget on top of the other. Both these widgets will then be in the same column.

Resizing Columns and Widgets

You can resize a column by dragging its edges right or left. All the widgets in this column are automatically resized accordingly.

To resize an individual widget, drag its edges right, left, up, or down.

If you decrease the height of an Indicator widget (either numeric or gauge type), it is reformatted as a ticker.

Original Indicator	Reduced Height (Ticker)
<p>Active Campaigns 29</p> <p>vs. Prev Month 9</p>	<p>Active Campaigns: 29 vs. Prev Month: 9</p>
<p>Open Rate</p> <p>38.2%</p> <p>vs. Prev Month 33.9%</p>	<p>Open Rate: 38.2% vs. Prev Month: 33.9%</p>

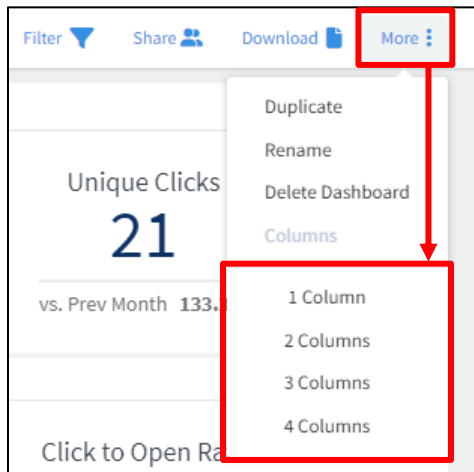


Adding Dashboard Columns

A dashboard can be organized in columns. By default, a dashboard is created with a single column, but it can include up to four columns. Each column can contain multiple widgets, but a widget cannot span more than one column.

To change the number of columns:

1. If you are in View mode, click the **Edit** tab to switch to Edit mode.
2. In the upper-right corner of the dashboard, click the **More [:]** button.
3. From this menu, select the desired number of columns.



Note

You can place widgets side-by-side in a single column. Setting up multiple columns provides additional structure options for your dashboards.

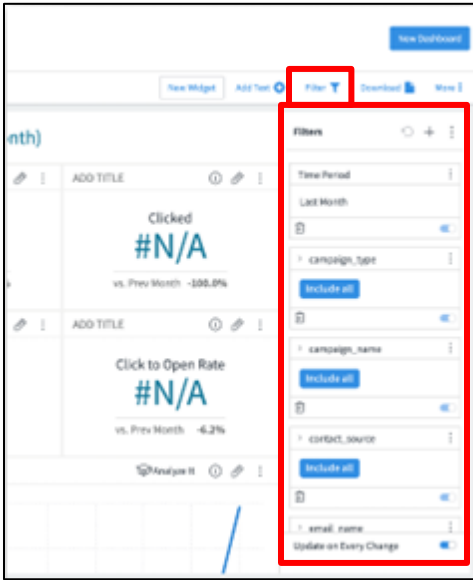
Warning

If you reduce the number of columns, the widgets in any removed columns are lost and cannot be restored, even if you then increase the number of columns again. (Added columns are always blank.)

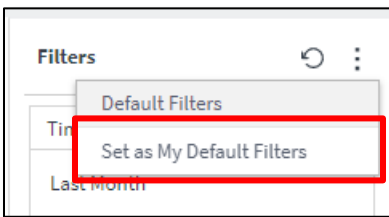
Applying Filters to a Dashboard

Dashboard widgets are linked and aware of each other. This means you can select something you are interested in from one of the widgets, and the rest of the dashboard updates to focus on that item.

Click the **Filter** button in the dashboard menu bar to open the filter panel, which allows you to select what data is included in the dashboard visualizations. The filters available are based on the dashboard but always include relevant data points for narrowing the dashboard results.



In the Filters panel, select [:] → **Set as My Default Filters** option to set the current set of filters as your default for the current dashboard.

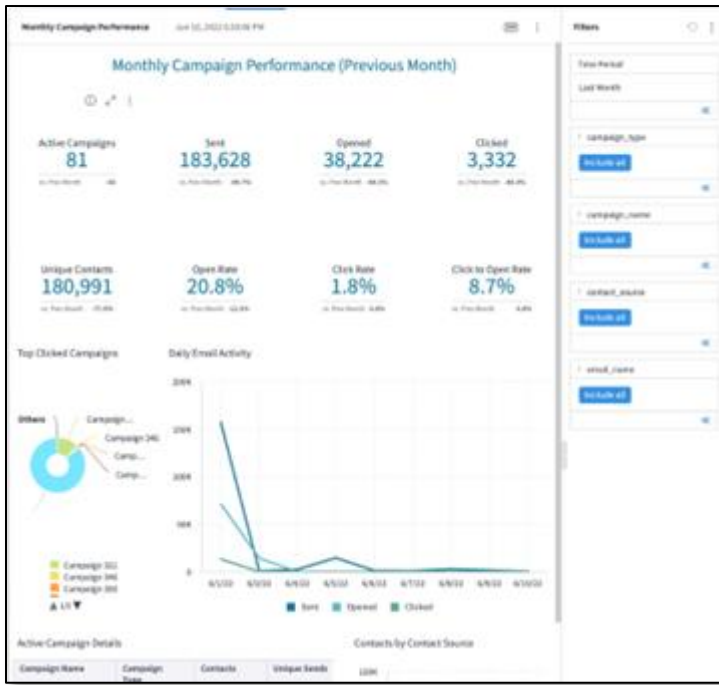


If you make further changes to the filters, click the refresh button (circle arrow) to return to the default. If you previously set up some filters and selected Set as My Default Filters, the refresh option restores the dashboard to that state, not the original default.

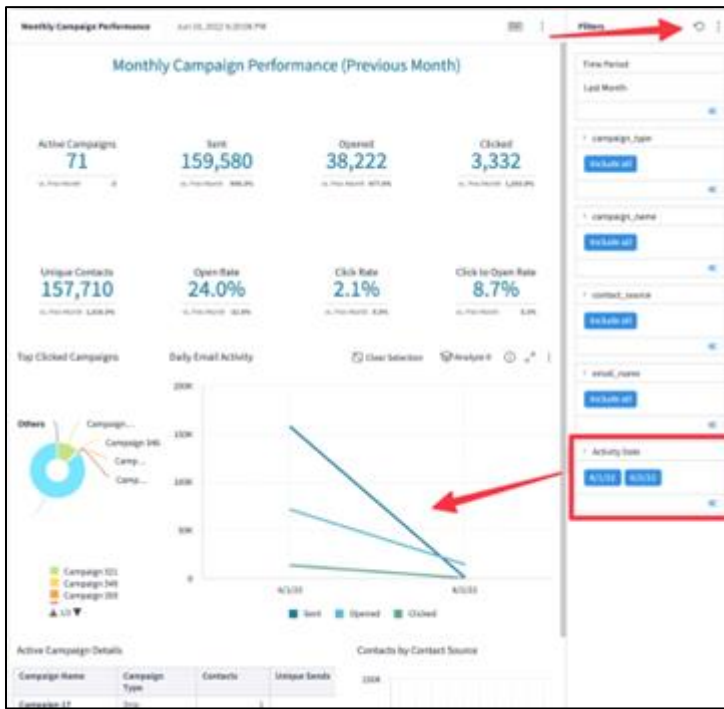
In the example below, the first send on the Daily Email Activity chart is highlighted, which updated the dashboard to only focus on those days.



Before



After

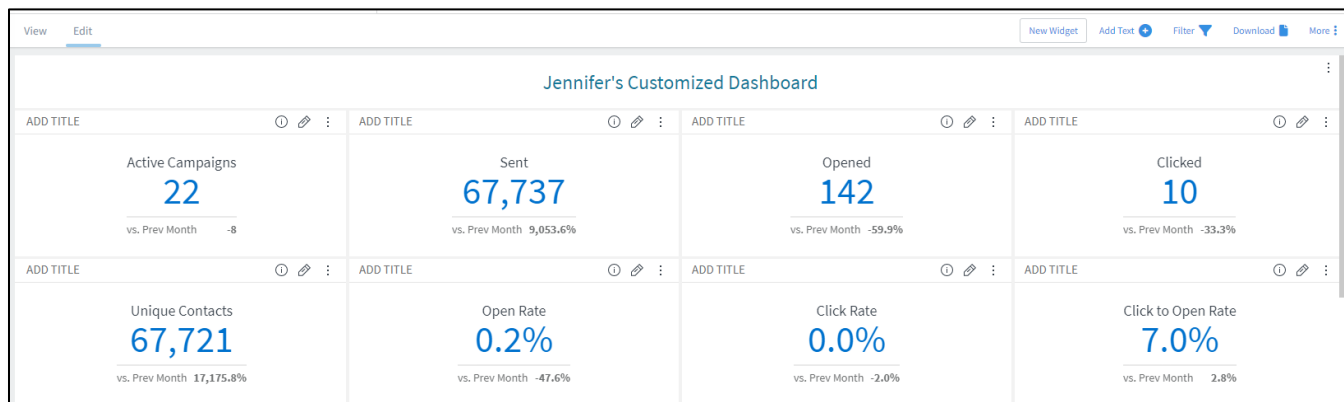


Modifying a Widget

You must be in Edit mode to enable widget modifications. You cannot modify widget's on a default dashboard, but you can duplicate a dashboard and then modify the widgets on the copy.



If you have the proper permissions to modify widgets, an Edit Widget button (pencil icon) appears in the header of each widget.



Click the **Edit Widget** button to open the widget editor. This editor allows you to change the type of widget, content, styling, and more.



Note

Editing individual widgets is an advanced feature that requires a good understanding of the data models. At this time, Total Expert is not providing full instruction, support or professional services for users who experiment with these options. Support of advance features will be provided in a future release.