Sitecore OMS 1

Online Marketing Suite Cookbook

A Practical Guide to Using Sitecore Analytics

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Chapter 1

Introduction

The Online Marketing Suite Cookbook contains instructions for marketers and content authors working with Sitecore Analytics. This guide contains step by step instructions on the key tasks necessary in setting up and configuring Sitecore Analytics on your website.

All of the examples in this cookbook use the Office Core website. This website is designed to highlight the functionality available in the Online Marketing Suite.

This cookbook contains the following chapters:

- **Chapter 1 — Introduction**
  This chapter is a description of the content, aims, and the intended audience of this cookbook.
- **Chapter 2 — Creating and Configuring Analytics**
  This chapter provides step by step instructions on how to create profiles, goals, campaigns, multivariate tests, and personalization. It also includes instructions on configuring these items in the Page Editor.
- **Chapter 3 — Assigning Analytics Values to Content Items**
  This chapter provides step by step instructions on how to assign profile values to content items, how to associate goals and campaigns with content items, and how to assign events, failures, and settings.
- **Chapter 4 — Analytics Reporting**
  This chapter provides information about the Sitecore standard reports as well as how to filter reports.

Chapter 2

Creating and Configuring Analytics

This chapter provides step by step instructions on how to create and configure analytics items in the Online Marketing Suite, Marketing Center.

This chapter contains the following sections:

- Content Profiling
- Creating Goals
- Creating Campaigns
- Testing
- Personalization

2.1 Content Profiling

Content profiles enable you to gain a better understanding of the behavior and actions of your website visitors.

Marketers create content profiles and profile keys in the Marketing Center and content authors use the Content Editor to assign values the contents of each web page.

When visitors come to your website they accumulate a profile score for each visit. This profile is based on the values assigned to the content that they view and is recorded in the session trail.

Profiles

Creating profiles and profile keys enables you to categorize the content on your website. So when visitors navigate through your site they accumulate a score that gives you an insight into the kind of content that they are interested in.

Profile scores can be viewed as a bar chart in the session trail. This information helps content authors to identify areas for improvement on the site. It can also be used for segmenting site visitors and to create rules for personalization.

Scores

Scores give you an insight into a visitor's level of interest in a website. For example, assigning a high lead score to an item, such as a brochure download page means that if a visitor views this page they have demonstrated a high level of interest in buying, so can be targeted as a potential sales lead.

This information can be particularly useful to sales teams. For instance, lead scores can give an indication of future customers and sales.

Examples of scores:

Score	Example
Lead	Pages related to price carry a high lead score on your website. Knowing which visitors achieve a high lead score could help a sales team to target potential new customers.
Investor	A visitor has viewed the annual report page on your site. Assigning this page a high investor score could indicate which visitors are interested in investment.
Big spender	Assigning a high score to page that records the total purchase amount of visitors on your site could indicate which visitors are the biggest spenders.

The Office Core website is configured to record *Lead* scores to demonstrate this concept. The deeper a visitor navigates into the site, the higher their lead score. There are some exceptions to this rule, such as downloading a brochure which carries a higher lead score. In Sitecore Analytics, the lead reports are stored under the *Sales* node and the lead scores of each visitor are shown in the session trail.

2.1.1 Pre-requisites

Before you assign profile values to content items you should consider creating:

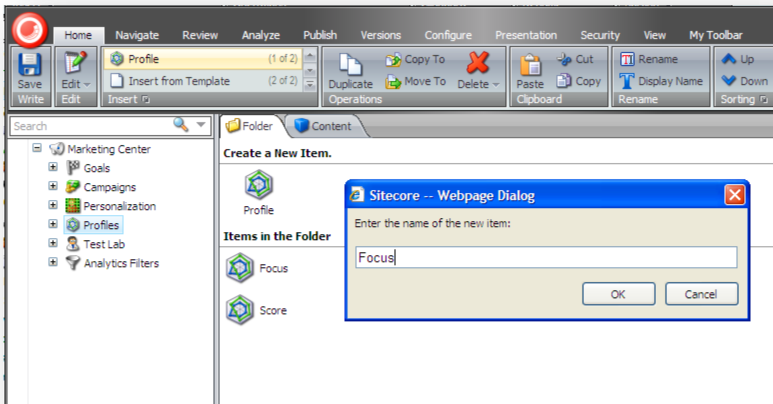
- Website personas

- A profiling strategy
- A scoring strategy

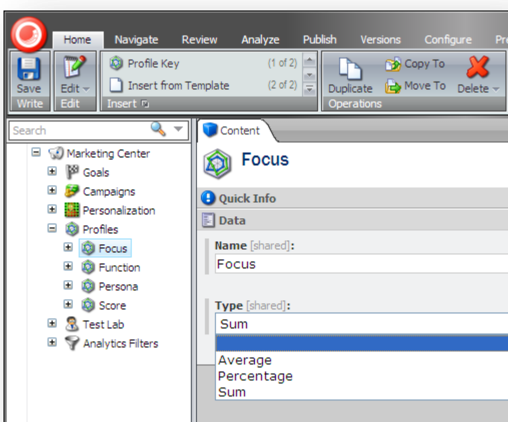
2.1.2 Creating Profiles

To create a new profile:

1. Click the Sitecore menu and then click Marketing Center.
2. In the **Marketing Center**, click *Profiles*.
3. In the **Home** tab, in the **Insert** group, click *Profile* to create a new profile definition item.



4. Give the profile a name, such as, *Focus*.
5. In the *Profile* item, enter the appropriate field values.



Field	Value
Name	The name of the profile, such as, *Focus*.

Field	Value
Type	Select one of the following methods of calculation: • Average • Percentage • Sum This determines how profile values are calculated.

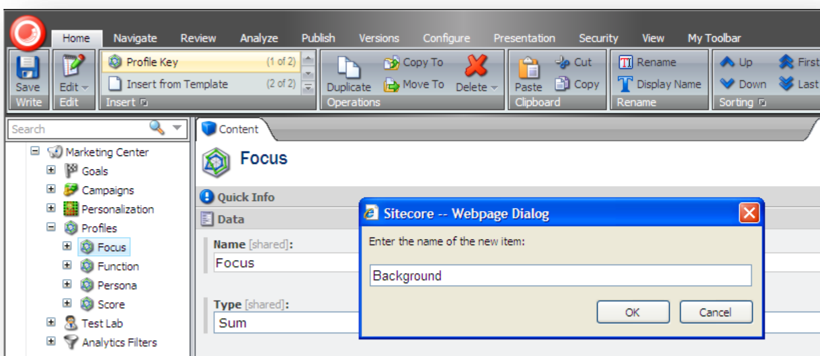
6. In the **Home** tab, click Save.
7. Click the **Publish** tab and then in the **Publish** group click **Publish**, **Publish Item** to publish the new profile.
8. In the publishing wizard, select the **Smart Publish** option

2.1.3 Creating Profile Keys

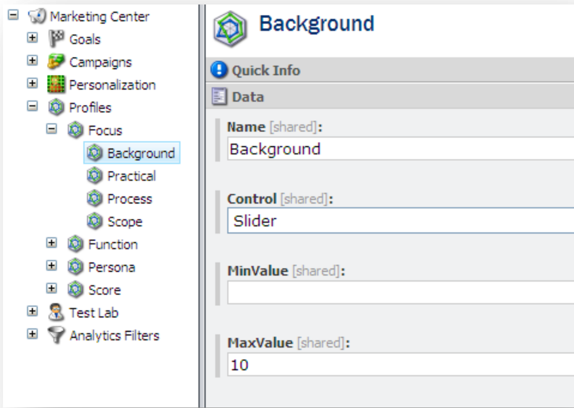
To create a new profile key:

1. In the **Marketing Center**, select a profile such as *Focus*.
2. In the **Insert** group, click *Profile Key* to create a new profile key definition item.

   Each profile can have any number of profile keys.
3. Give the profile key a name, such as, *Background.*



4. In the new *Background* item, enter field values.



Field	Value
Name	A name for the profile key, such as, *Background*.
Control	Select the type of control to appear in the **Profiles** dialog box: • Checkbox • Slider • Smileys • Stars • Text
MinValue	Enter a numeric value, such as, 1. This field can also be left blank.
MaxValue	Enter a numeric value, such, as 10.

5. In the **Content Editor** ribbon, click **Save**.

6. Publish the new item. In the publishing wizard, select the **Smart Publish** option.

Note
In the Sitecore Analytics training website there are four pre-configured profiles. Each profile has its own set of profile keys. You can extend or delete these profile keys as appropriate for your site.

You can create any number of profiles and profile keys but it is worthwhile planning a profiling strategy before you start creating profile definition items.

2.2 Creating Goals

Creating goals and campaigns enables you to measure the success of your website.

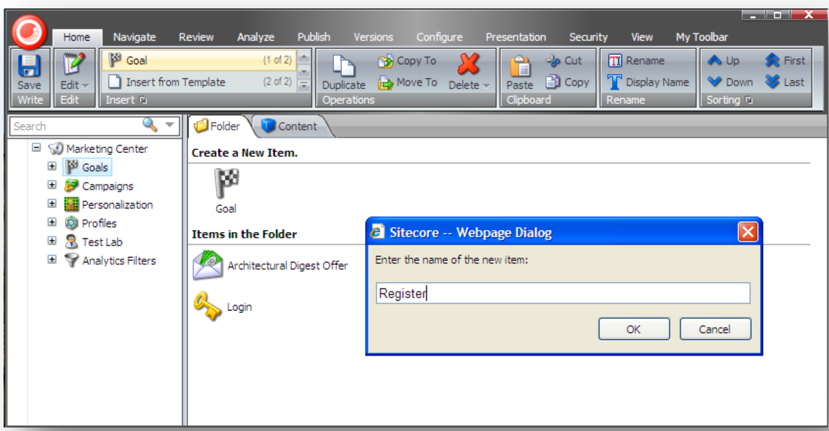
Examples of goals:

- Download a brochure
- Register for an e-mail newsletter
- Sign up for an online demo

Once you have created some goals you can measure the conversion rate for each goal (the percentage of visitors that achieve a particular goal). The website performance reports show goals and conversion rates.

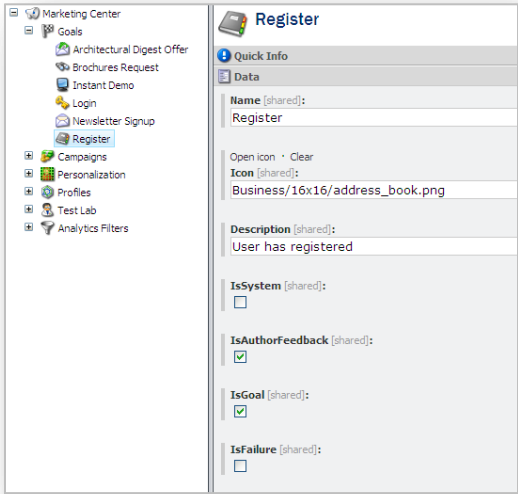
To create a new goal:

1. Click the **Sitecore** button and then click the **Marketing Center**.
2. In the **Marketing Center**, click *Goals*.
3. In the **Home** tab, **Insert** group, click *Goal* to create a new goal definition item.



4. Give the goal a name, such as, *Register*.

5. In the new goal definition item, enter the appropriate values.



Field	Value
Name	Enter a name of your goal, such as, *Register*
Icon	Select an icon for your goal. Click Open icon and select an icon in the **Open File** dialog box. To upload an icon of your own, click Upload in the **Open File** dialog box.
Description	Enter a suitable description, such as, *User has registered*.
IsSystem	This defines the event as a system event. For administrators and advanced users only.
IsAuthorFeedback	Select this checkbox to provide the content author with feedback on goals.
IsGoal	Select this checkbox to ensure that the goal appears in the Content Editor, **Goals** dialog box. You can then associate the goal with a content item.
IsFailure	Select this checkbox to define the event as a failure. For administrators and advanced users only.

6. Click **Save** to save the new goal.
7. Publish the new goal item. In the publishing wizard, select the **Smart Publish** option.

2.3 Creating Campaigns

A campaign is a promotion or advertising initiative designed to encourage people to come to a website and perform desired actions.

Sitecore Analytics supports two types of campaigns:

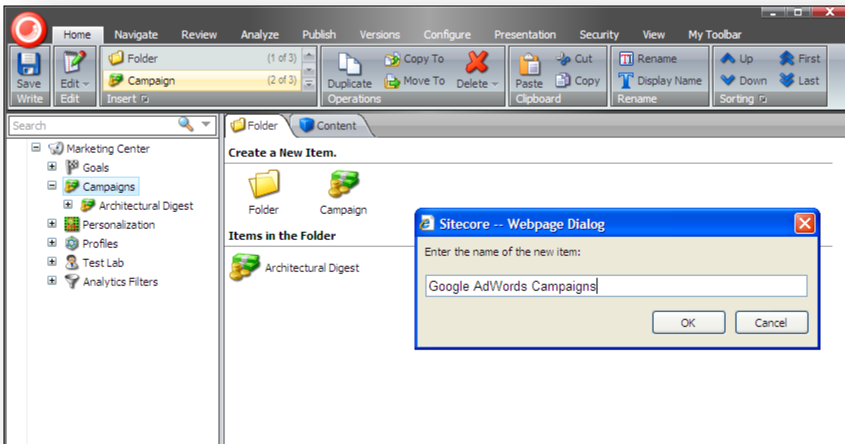
- Online Campaigns
- Offline Campaigns

You can view reports that show which of your campaigns are the most successful. You can then improve or drop unsuccessful campaigns and improve your ROI.

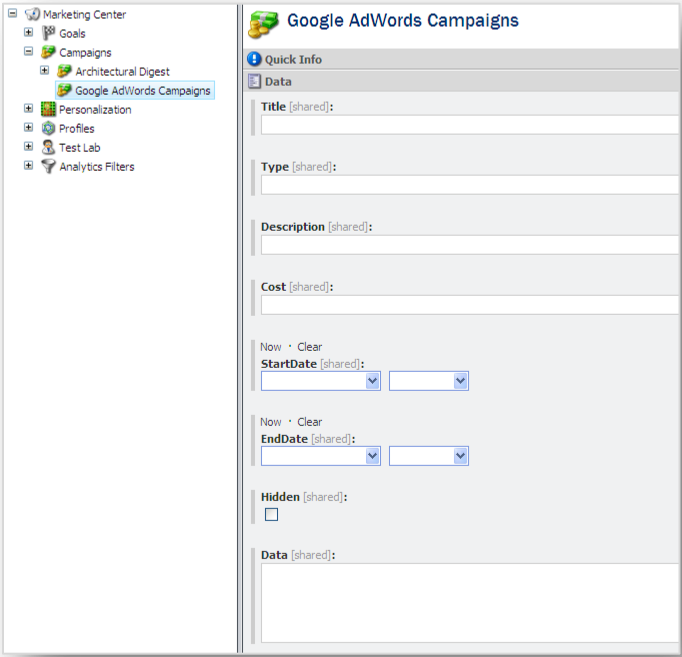
You create goals and campaigns in the Marketing Center. You associate goals and campaigns with content items in the Content Editor.

To create a campaign:

1. In the **Marketing Center**, click *Campaigns*, and then in the **Home** tab, in the **Insert** group, click *Campaign*.
2. Give your new campaign a name, such as, *Google AdWords Campaigns* and click **OK**.



3. In the new campaign item, enter the appropriate values.



Field	Value
Title	The title of the campaign.
Type	The type of campaign — whether it is an online or offline campaign.
Description	A longer description of your campaign.
Cost	Monetary cost of the campaign. For example, Google AdWords campaigns have a cost per click.
StartDate	The start date for the campaign.
EndDate	The end date for the campaign.
Hidden	Whether or not the campaign should be shown in reports. For example, you may not want to show campaigns that are created automatically in your campaign reports.

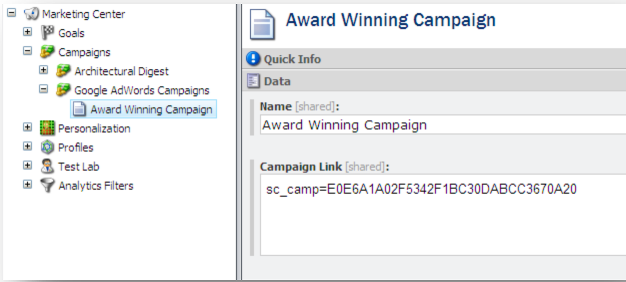
4. Click **Save** to save the new campaign.
5. Publish the new campaign item. In the publishing wizard, select the **Smart Publish** option.

2.3.1 Creating Campaign Events

To create a campaign event:

1. In the **Marketing Center**, select a campaign item and then in the **Home** tab, in the **Insert** group, click *Campaign Event*.
2. Give your new campaign event a name, such as *Award Winning Campaign* and click **OK**.

3. In the new item, enter the appropriate field values.



Field	Value
Name	The name of the campaign.
Campaign Link	This field contains a campaign query string. For example: `sc_camp=7F967B85B627472AABE83F5F3DA51421` Append the query to the link to your website provided on the sponsored site. If the link already includes a query string, prefix the provided text with an ampersand (&). If the link does not include an existing query string, prefix the text with a question mark (?). This ensures that site visits generated by this campaign are recorded in the analytics system.

4. Click **Save** to save the campaign event.
5. Publish the new campaign event item. In the publishing wizard, select the **Smart Publish** option.

2.4 Testing

Sitecore Analytics lets you dynamically test the content of your website to find out which web controls are the most effective.

You can create multivariate tests to see which combinations of text and images work best with site visitors. This can be particularly useful as a part of your strategy when setting goals and optimizing campaigns.

The Sitecore Analytics MV Tests report gives you pre-configured statistics on your tests and includes data on the number of conversions that result from each test.

2.4.1 Pre-requisites

Before you can create a multivariate test, you need:

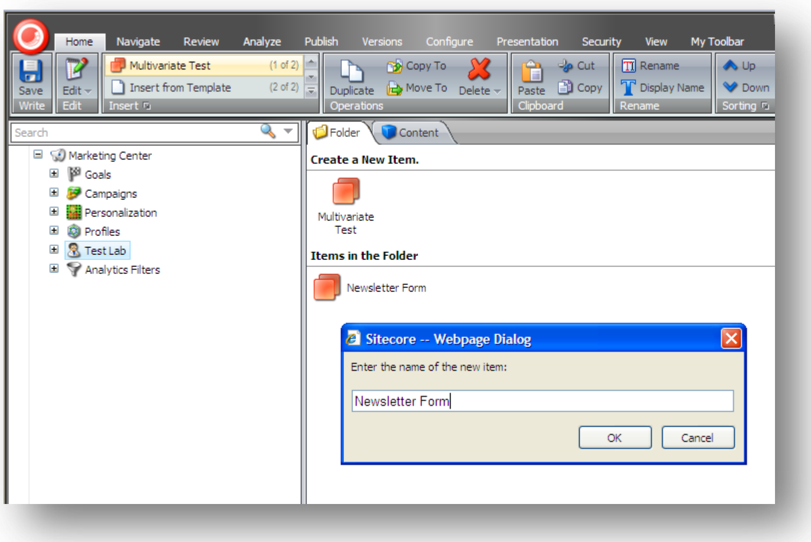
- Two or more content items to use as test variables.
- A control to use as the data source for your test.

2.4.2 Creating Multivariate Tests

In the following example, you will create a multivariate test for a newsletter form. Visitors to your website complete this type of form to register for an e-mail newsletter. In this multivariate test, you test three different combinations of text and graphics to find out which is the most effective.

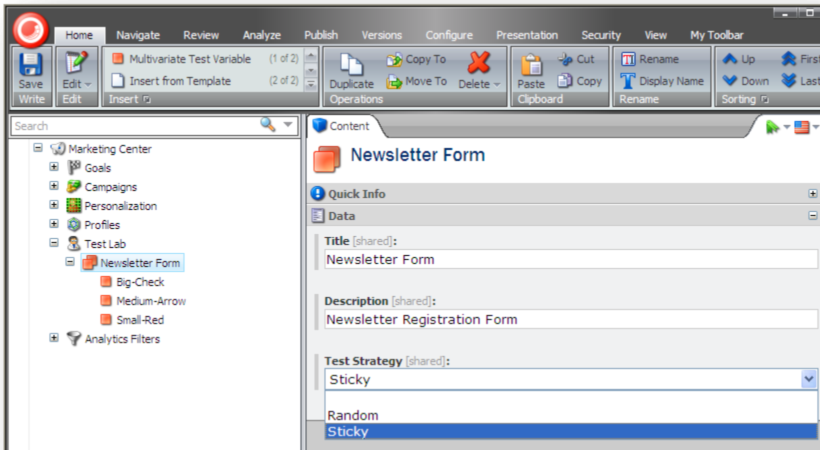
To create a multivariate test:

1. Click the **Sitecore** button, and then click **Marketing Center**.
2. In the **Marketing Center**, click *Test Lab*.



3. In the **Home** tab, in the **Insert** group, click *Multivariate Test* to create a new multivariate test definition item.

4. Call your test *Newsletter Form*.



5. In the new test item, enter the appropriate field values.

Field	Value
Title	The title of the test, such as *Newsletter Form*.
Description	A description of the test.
Test Strategy	Select a test strategy: • Random — the test variable changes for each page request • Sticky — the test variable changes for each visitor session (recommended)

6. Click **Save** to save the new test.

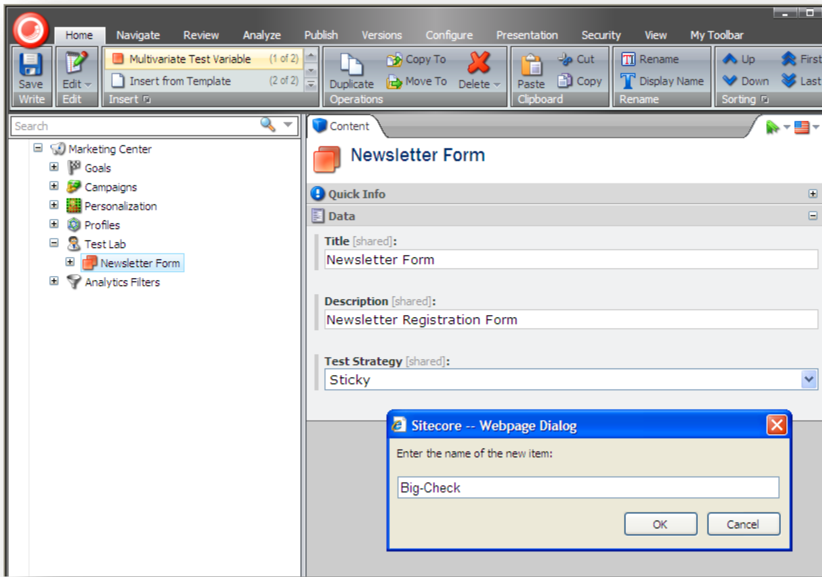
2.4.3 Creating Multivariate Test Variables

Each multivariate test must have at least two test variables. Each variable represents an item of web content that you want to test. These content items must be created already.

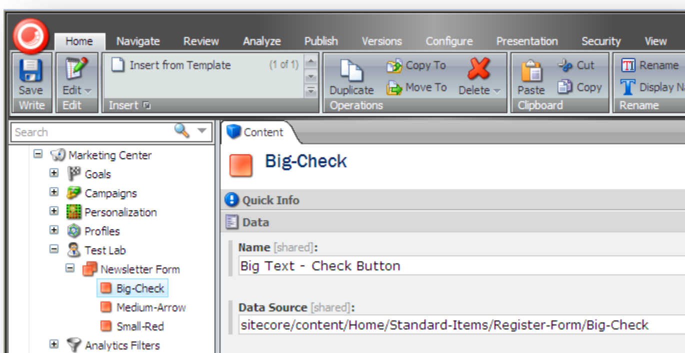
Create three test variables for the *Newsletter Form* test:

1. In the **Marketing Center**, select the *Newsletter Form* multivariate test that you created earlier.

2. In the **Home** tab, in the **Insert** group, click *Multivariate Test Variable* to create a new test variable.



3. For this example, create the following three multivariate test variables:
   - Big-Check
   - Medium-Arrow
   - Small-Red



4. For each variable enter the following field values:

Field	Value
Name	A suitable name for the test variable. For example, *Big-Check*.
Data Source	A link to the content item that is the data source for this test variable, for example: `sitecore/content/Home/Standard-Items/Register-Form/Big-Check`

5. Click **Save** to save the test variable.
6. Repeat this procedure for each test variable.

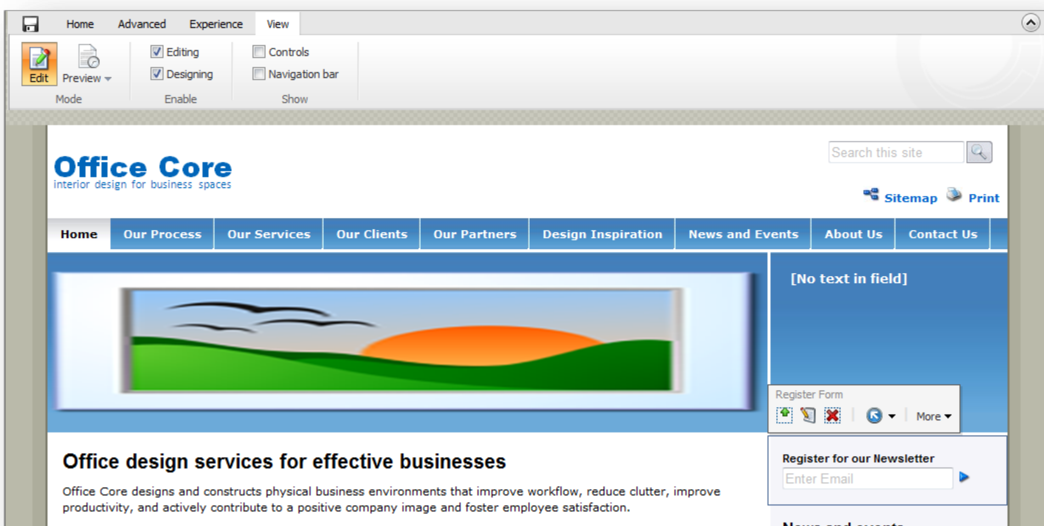
   Link each variable to one of the content items that you want to test.
7. Publish the new test variables. In the publishing wizard, select the **Smart Publish** option.

2.4.4 Configuring Multivariate Tests

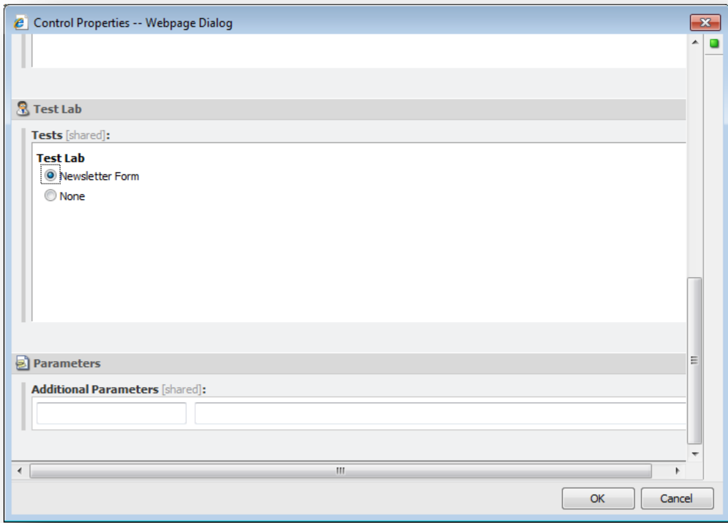
To activate a multivariate test on your website, you must edit the layout properties of the page where you want to place the test. You can do this in the Page Editor or in the Content Editor.

Configuring Multivariate Tests in the Page Editor

1. In the Sitecore Desktop, click **Sitecore**, and then click **Page Editor**.
2. In the **Page Editor**, navigate to the page that you want to place the test on. In this case, the *Home* page.
3. Click the **Toggle the ribbon** button to display the ribbon.
4. In the ribbon, click the **View** tab and in the **Enable** group, select the **Designing** check box to enable the design functionality in the **Page Editor**.
5. On the *Home* page, select the *Register for our Newsletter* item to see the design options for this item.



6. Click the **Properties** button to open the **Properties** dialog box for this control.



7. In the **Properties** window, scroll down to the **Test Lab** section, and select the *Newsletter Form* test.
8. Click **OK**.
9. In the **Page Editor**, click **Save**.

Now when a visitor comes to the website, a register form control is displayed on the home page. The same register form control is displayed for the entire duration of the browser session. When a visitor closes the browser window, they end the session. When a visitor returns to start a new session, a different register form variable is displayed.

This enables you to test each variable so you can find out which control is the most effective.

Sitecore Analytics contains an MV Test report that lets you evaluate your multivariate tests. This report includes the following information:

- Summary data for each test.
- Percentage of session visits per test variable.
- Number of session visits per test variable.
- Percentage of session conversions per test variable.
- Number of session conversions per test variable.

2.5 Personalization

Personalization allows you to deliver targeted content to specific site visitors. An appropriate time to implement this is after segmentation has enabled you to identify the visitors that you most want to target.

You can create rules to show or hide content to site visitors based on their browsing behavior and accumulated profile values.

You can make your site respond in real-time by showing or hiding content, adjusting the behavior of a web control or by running a multivariate test.

2.5.1 Pre-requisites

Before you can create personalization rules you need the following components:

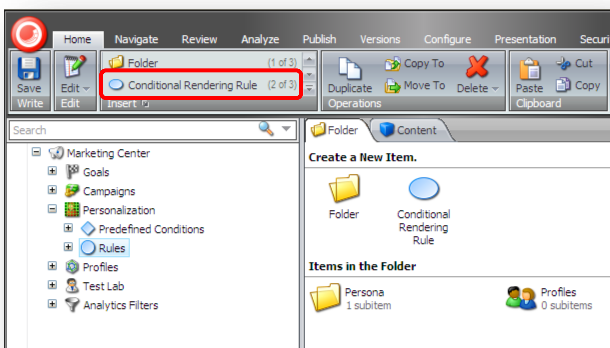
- Content items to use as the data source for the conditional renderings.
- A Web control or rendering item.

2.5.2 Creating Personalization Rules

In Sitecore Analytics, you can create rules to determine which content is shown to different site visitors. This is called conditional rendering. You create conditional rendering rules in the Marketing Center.

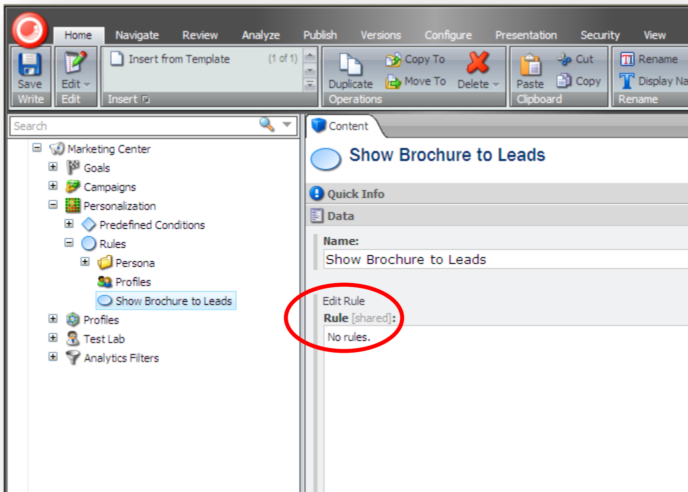
To create a conditional rendering rule:

1. Open the **Marketing Center**.
2. In the content tree, click *Personalization* and then click *Rules*.

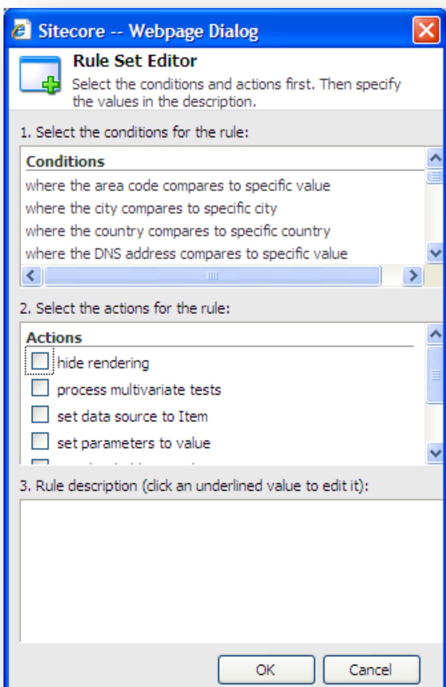


3. To create a new rule, in the **Home** tab, in the **Insert** group, click *Conditional Rendering Rule*.
4. Give the rule a name, for example, *Show Brochure to Leads* and then click **Save**.
5. In the new rule item, in the **Name** field, enter the name of the rule. This is the same name that will appear in the **Designer** when you configure your rule.

6. In the **Rule** field, click **Edit Rule**.



7. In the **Rule Set Editor** dialog box, select a condition and an action for your rule.



Rules Example

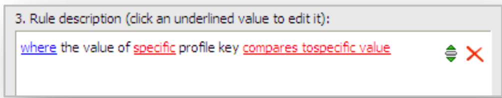
This example demonstrates how to create a rule that determines when new site visitors will see the Office Core brochure link.

On the Office Core site, a brochure download link is displayed on every page, apart from the home page. This rule will specify that the brochure link on the *Our Services* page is not displayed to new visitors unless they attain a lead score of 20 or more.

1. In the **Marketing Center**, create a new rule called *Hide for New Visitors*.
2. In the *Hide for New Visitors* item, in the **Rule** field, click **Edit Rule** to open the **Rule Set Editor** dialog box.
3. In the **Rule Set Editor** dialog box, in the **Select the conditions for the rule** section, scroll down and select the following rule:

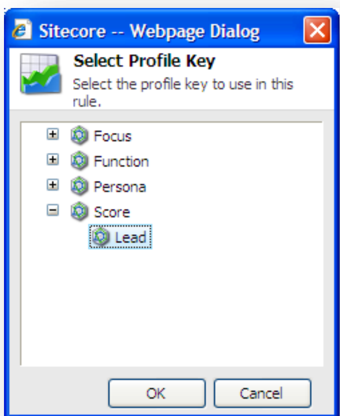
   "Where the value of specific profile key compares to specific value"

   This rule is now displayed in the **Rule description** section.

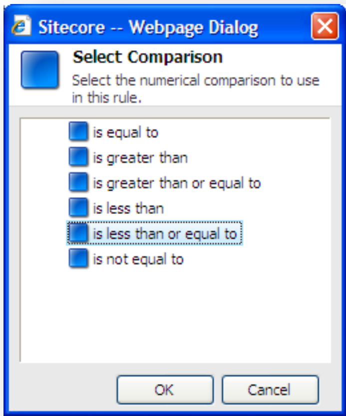
   Now you must edit the values in this condition so that only visitors who have accumulated a lead score of 20 or more can see the brochure download link.

4. In the **Rule description** section, click "*specific"* to open the **Select Profile Key** dialog box.

5. In the **Select Profile Key** dialog box, expand *Score* and select *Lead*.
6. In the **Rule Set Editor** dialog box, in the **Rule description** section, click "*compares to"*, to select a comparison to use in this rule.

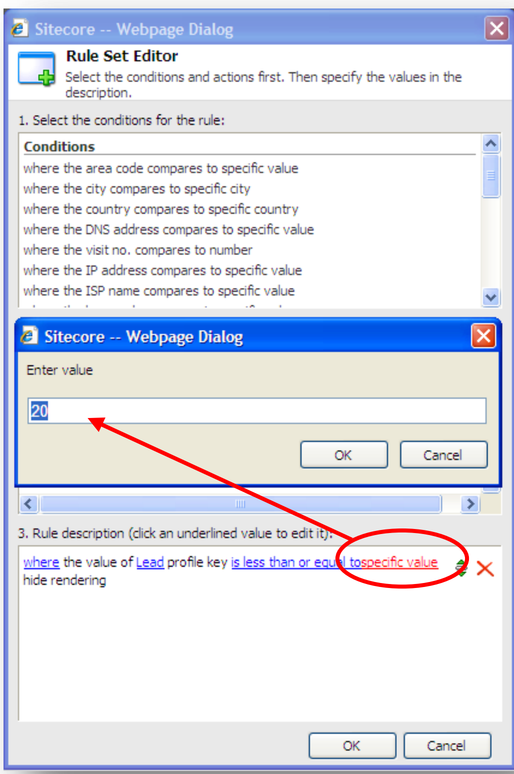
7. In the **Select Comparison** dialog box, select "*is less than or equal to"* and click **OK**.



8. In the **Rule Set Editor** dialog box, in the **Rule description** section, click "*specific value"*, to enter a numerical value.

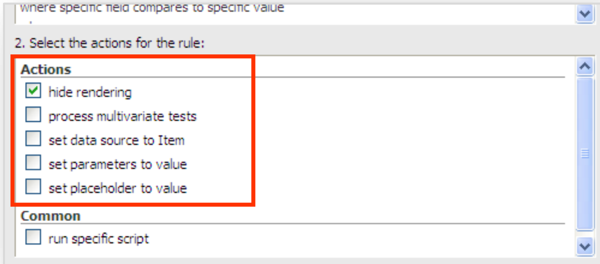
   In this example, you want the brochure download link to be displayed on the *Our Services* page when the *Lead* profile score is higher than 20.

   Enter "*20*" and click OK.



9. In the **Rule Set Editor** dialog box, in the **Select the actions for the rule** section, select one of the pre-configured actions for your rule.

In this example, select "*hide rendering"*.



10. In the **Rule Set Editor**, click **OK** to save the rule.
11. In the **Marketing Center**, click **Save** and then publish the new rule. In the publishing wizard, select the **Smart Publish** option.

2.5.3 Configuring Personalization Rules

To activate a personalization rule on your website, you must edit the layout properties of the page you want to personalize. There are two ways to do this.

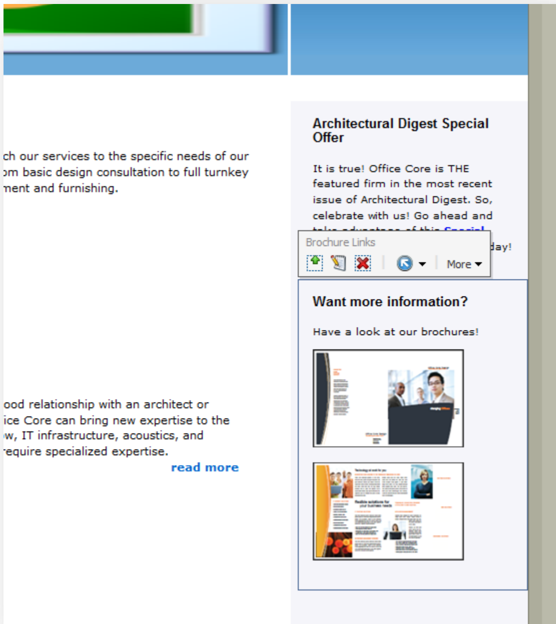
- In the **Content Editor**, use the **Presentation** tab, **Layout Details** dialog box.
- In the **Page Editor**, use the **Designing** mode.

Configuring Personalization Rules in the Page Editor

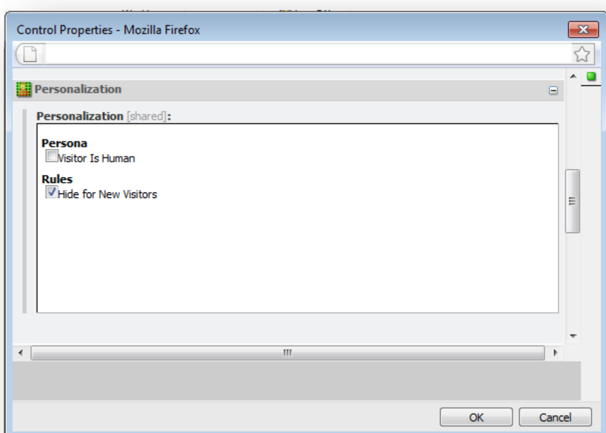
1. In the Sitecore Desktop, click **Sitecore** and then click **Page Editor**.
2. In the **Page Editor**, navigate to the page that you want to edit.

   In this example, edit the *Our Services* page.
3. In the ribbon, click the **View** tab and in the **Enable** group, select the **Designing** check box to enable to the design functionality in the **Page Editor**.

4. Select the *Brochure Links* control and click **Properties** to open the **Properties** dialog box.



5. In the **Properties** window, scroll down to the **Personalization** section.



6. Select the rule you created called — *Hide for New Visitors*.
7. Click **OK** to close the **Properties** window.
8. In the **Page Editor**, click **Save**.

Testing the Rule

To test that the rule works:

1. In a new browser window, open the Office Core website.
2. Navigate to the *Our Services* page.

Notice that there is no longer a brochure displayed in the right-hand column.

3. Explore the site a little more and return to the *Our Services* page.

   Once you have accumulated a lead score of 20 or more, the brochure link will appear in the right-hand column.

Chapter 3

Assigning Analytics Values to Content Items

This chapter tells you how to assign profile values and scores to content items using the Content Editor or the Page Editor. It also explains how to associate Sitecore Analytics items with content items.

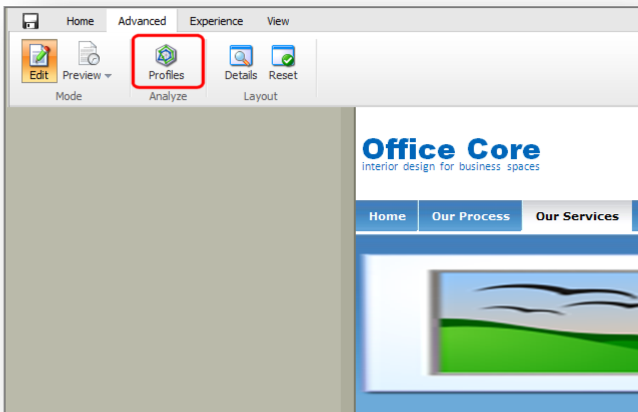
- Assigning Values to Profiles and Scores
- Associating Goals with Items
- Associating Campaigns with Content Items
- Assigning Events to Items
- Assigning Failure Actions to Items
- Page Settings

3.1 Assigning Values to Profiles and Scores

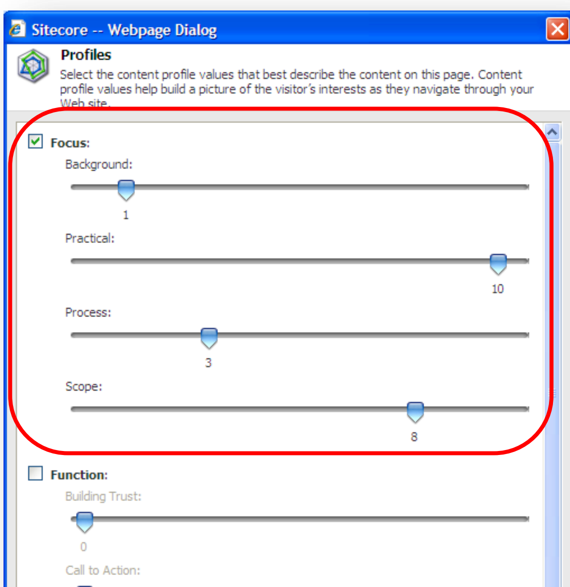
Once you have created a set of profiles and profile keys you can start to assign values to content items on your website. You assign values to profile keys in the Content Editor or Page Editor.

3.1.1 Assigning Profile Values to Content Items in the Page Editor

1. Open the **Page Editor** and in the Office Core website, navigate to *Our Services*.
2. In the **Page Editor**, **Advanced** tab, **Analyze** group, click **Profiles** to open the **Profiles** dialog box.



3. In the **Profiles** dialog box, select the **Focus** check box and move the slider controls to assign values to each profile key.



You have now assigned values to the *Focus* profile.

4. Repeat this procedure for each profile key.

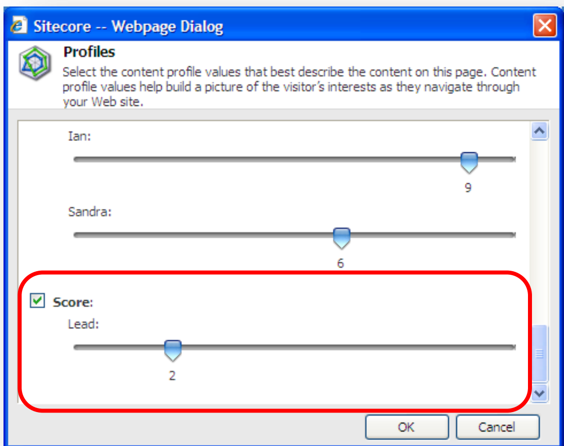
Note
Profile key values can be left blank if they are unsuitable for a content item.

5. When you have finished assigning values to profile keys, click **OK** to close the **Profiles** dialog box and to save your changes.

Note
If you do not select the check box next to a profile key first before editing it, the values are not saved.

3.1.2 Assigning Scores

You also use the **Profiles** dialog box to assign scores to content items in the same was as you assign profile values to content items.



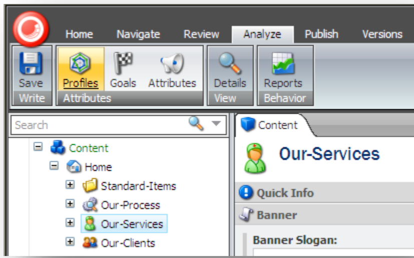
3.1.3 Assigning Profile Values to Content Items in the Content Editor

You can also use the Content Editor to assign profile values to content items.

To assign profile values to content items in the Content Editor:

1. In the **Content Editor**, expand the content tree and locate the item that you want to assign profile values to.

2. In the **Analyze** tab, in the **Attributes** group, click **Profiles** to open the **Profiles** dialog box.



3. In the **Profiles** dialog box, repeat the procedure described in the previous section.

3.2 Associating Goals with Items

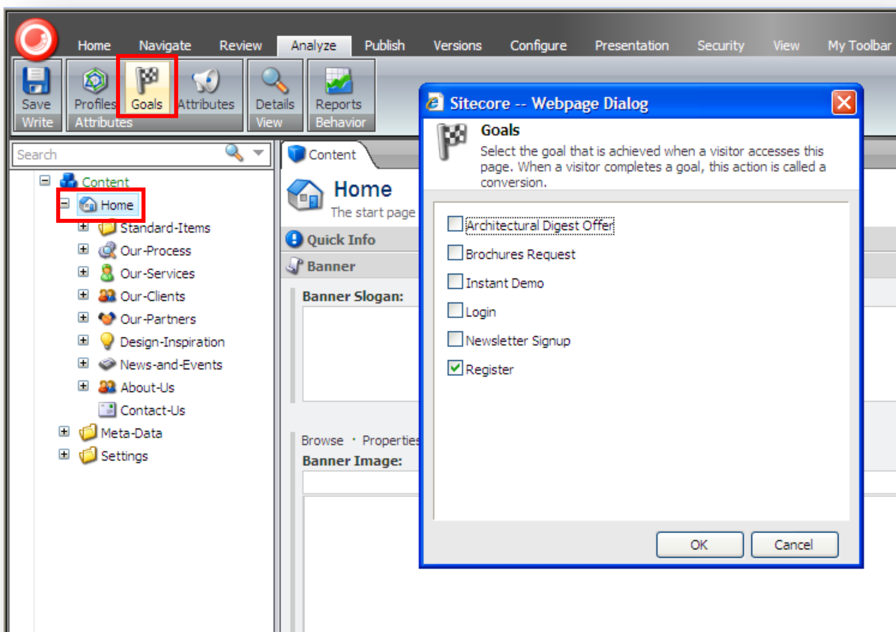
After you create a goal in the Marketing Center, you must associate the goal with a content item.

When a visitor navigates to a page that has a goal assigned to it, a conversion is recorded in Sitecore Analytics.

In this example, you assign the *Register* goal to the *Home* item.

How to associate a goal to a content item:

1. Open the **Content Editor**.
2. Navigate to the *Home* item.
3. Click the **Analyze** tab and then in the **Attributes** group, click **Goals**.



4. In the **Goals** dialog box, select the *Register* goal.
5. Click **OK** to save your changes.

You have now assigned the *Register* goal to the *Home* item.

3.3 Associating Campaigns with Content Items

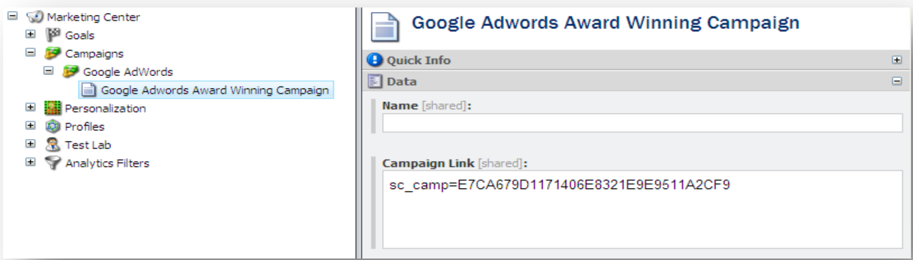
After creating a campaign in the Marketing Center, you must ensure that the campaign is triggered in Sitecore Analytics so you can track which campaigns your site visitors have come from.

Online Campaigns

An online campaign consists of a campaign definition item and a campaign event. To associate an online campaign with a content item, you must copy the campaign query string to the sponsored site and if necessary edit the query string to point to a page on your website.

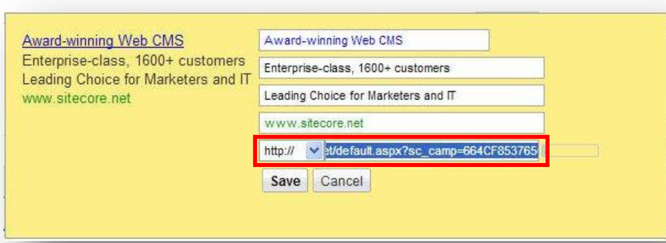
How to associate an online campaign with a content item:

1. Open the **Marketing Center**.
2. Expand the *Campaigns* node and then click the *Google AdWords Award Winning Campaign*.



3. In the **Campaign Link** field, copy the query string.
4. Paste the query string to your sponsored site.

   This example uses a Google AdWords campaign.
5. Paste the campaign query string into your sponsored site.



   You must append the query string to your site URL. In this example the website URL is:

   `www.sitecore.net/default.aspx`

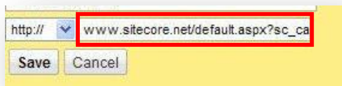
   The query string provided for this campaign is:

   `sc_camp=E0E6A1A02F5342F1BC30DABCC3670A20`

   After you insert the query string, you must insert a question mark to complete the path, as this is not included in the **Campaign Link** field:

   `www.sitecore.net/default.aspx?sc_camp=E0E6A1A02F5342F1BC30DABCC3670A20`

6. By default the campaign query string links to your home page. To point to a different page, you must edit the query string. For example, you could replace `/default.aspx?` with `/Our-Services.aspx?`



When a visitor comes to your website from this campaign, a campaign event is triggered in Sitecore Analytics, and this is recorded in the *Latest Human Sessions* report.

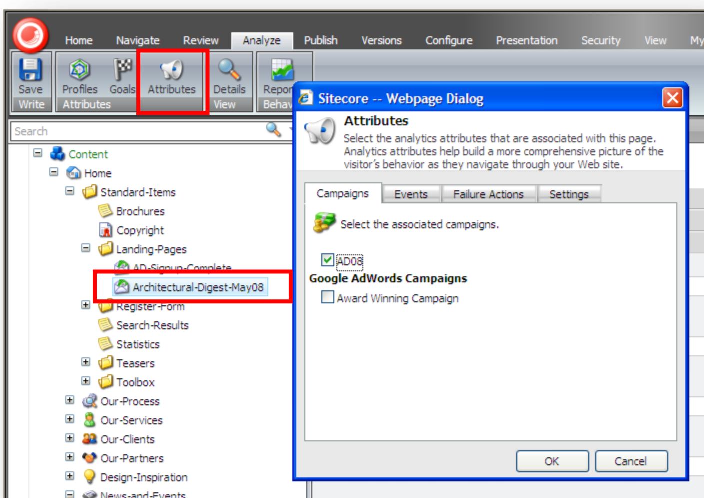
Offline Campaigns

An offline campaign consists of a campaign definition item, a campaign event, and a landing page that can be reached using an alias.

To activate an offline campaign, you use the Content Editor to associate the campaign event with a landing page. In this example, you associate the *AD08* campaign with the *Architectural-Digest-May-08* landing page.

To associate an offline campaign with a landing page:

1. Open the **Content Editor**.
2. In the **Content Editor** content tree, navigate to the *Standard-Items* folder. Open the *Landing-Pages* folder and then select the *Architectural-Digest-May08* content item.
3. In the **Analyze** tab, in the **Attributes** group, click **Attributes** to open the **Attributes** dialog box.



4. In the **Attributes** dialog box, select the *AD08* campaign.
5. Click **OK**.

Now when visitors come to your site from this campaign, a campaign event is triggered and this is recorded in the *Latest Human Sessions* report in Sitecore Analytics.

3.4 Assigning Events to Items

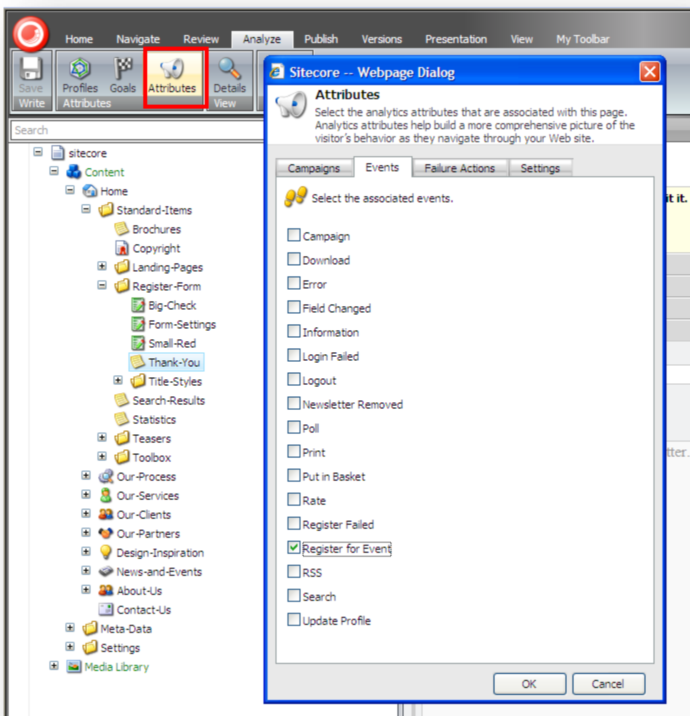
Events are used to track user activity on a website. They help to build up a more comprehensive picture of a visitor's behavior as they navigate through the website.

Goal and campaign events are triggered when visitors achieve certain objectives on the website or when they come to a site from a promotion or campaign that you have created. These events are tracked in Sitecore Analytics and appear in the campaign and conversion tracking reports.

You can also associate other events with content items. You can track events, such as, download, search, registration or logout. Sitecore administrators can create additional events if needed.

To assign an event to a content item:

1. In the **Content Editor**, expand the content tree and navigate to the content item that you want to assign an event to.
2. In the **Analyze** tab, in the **Attributes** group, click **Attributes** to open the **Attributes** dialog box.
3. In the **Attributes** dialog box, click the **Events** tab, and select the event that you want to assign to the content item.



4. Click **OK** to save your changes and close the **Attributes** dialog box.

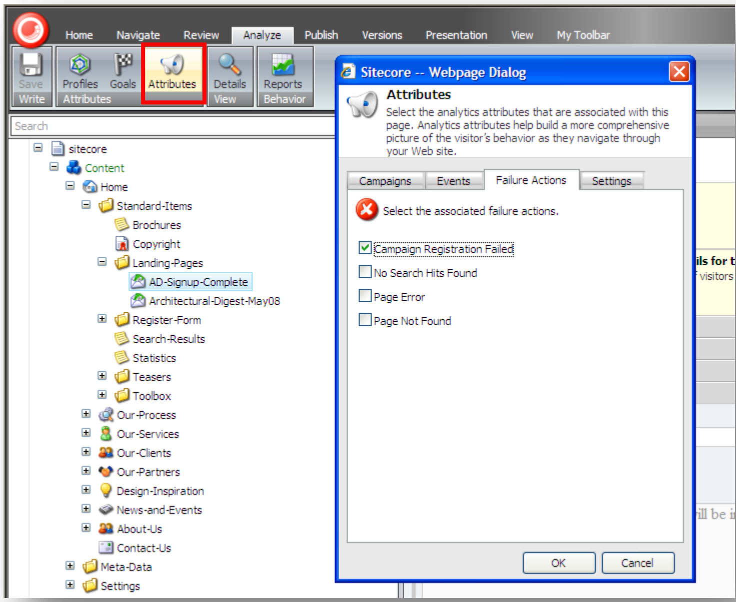
3.5 Assigning Failure Actions to Items

Failure actions are another type of event. Normally page failures are recorded programmatically. You can, however, use failure actions to record any page failures that occur on the website in Sitecore Analytics.

For example, if you have an error page that you display to site visitors when an error occurs, you can associate a failure action such as Page Error with this page. Then when a visitor sees this page, a page error is recorded in Sitecore Analytics and you can track all the page errors that occur on your site in this way.

To assign a failure action to a content item:

1. In the **Content Editor**, expand the content tree, and navigate to the content item that you want to assign a failure action to.
2. In the **Analyze** tab, in the **Attributes** group, click **Attributes** to open the **Attributes** dialog box.
3. In the **Attributes** dialog box, click the **Failure Actions** tab, and select the event that you want to assign to a content item.



4. Click **OK** to save your changes and close the **Attributes** dialog box.

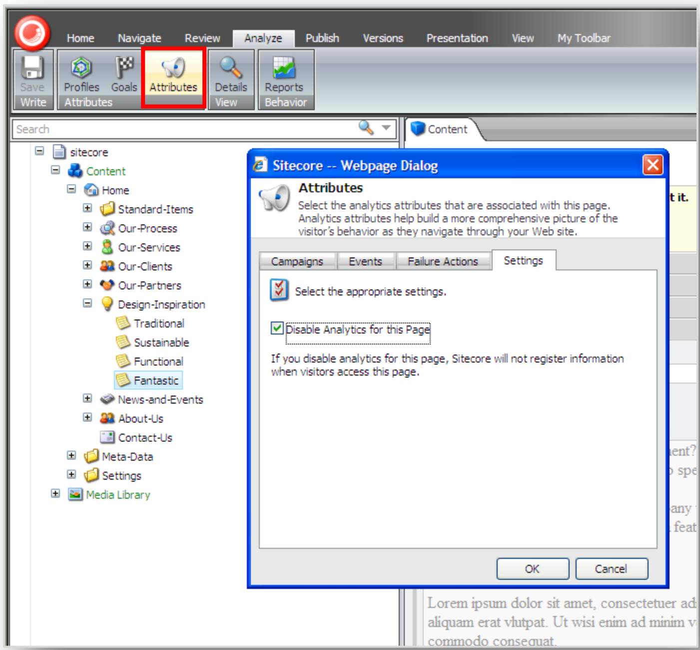
3.6 Page Settings

You can also disable analytics on any content item on your website by choosing the Disable Analytics for this Page toggle on the Settings tab. Once you have applied this setting, the page is no longer visible in the visitor session trail or any other reports in Sitecore Analytics.

This is useful if you, for example, have a page that automatically redirects visitors to another page. You may not want such a page to appear in reports and session trails.

To assign a setting to a content item:

1. In the **Content Editor**, expand the content tree, and navigate to the content item that you want to keep out of the reports.
2. In the **Analyze** tab, in the **Attributes** group, click **Attributes** to open the **Attributes** dialog box.
3. In the **Attributes** dialog box, click the **Settings** tab and select *Disable Analytics for this Page* to assign this setting to the content item.



4. Click **OK** to save your changes and close the **Attributes** dialog box.

Chapter 4

Analytics Reporting

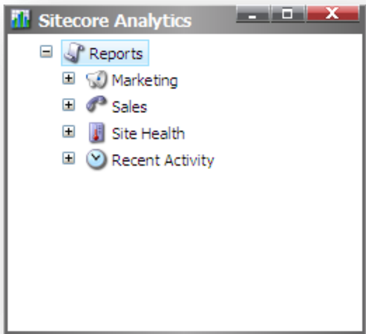
This chapter describes the Sitecore Analytics reporting system that lets you present, analyze, and refine all of the statistics collected by the Online Marketing Suite.

This chapter includes instructions on:

- Running Sitecore Analytics Reports
- Viewing the Session Trail
- Classifying Site Visitors
- Subscribing to Reports
- Linking to CRM
- Saving and Filtering Reports

4.1 Running Sitecore Analytics Reports

Sitecore Analytics contains a number of standard reports that you can run out of the box. These reports are grouped in the following categories:



Marketing
Campaigns, Goals, Site Metrics, MV Tests

Sales
Lead reports or other score information

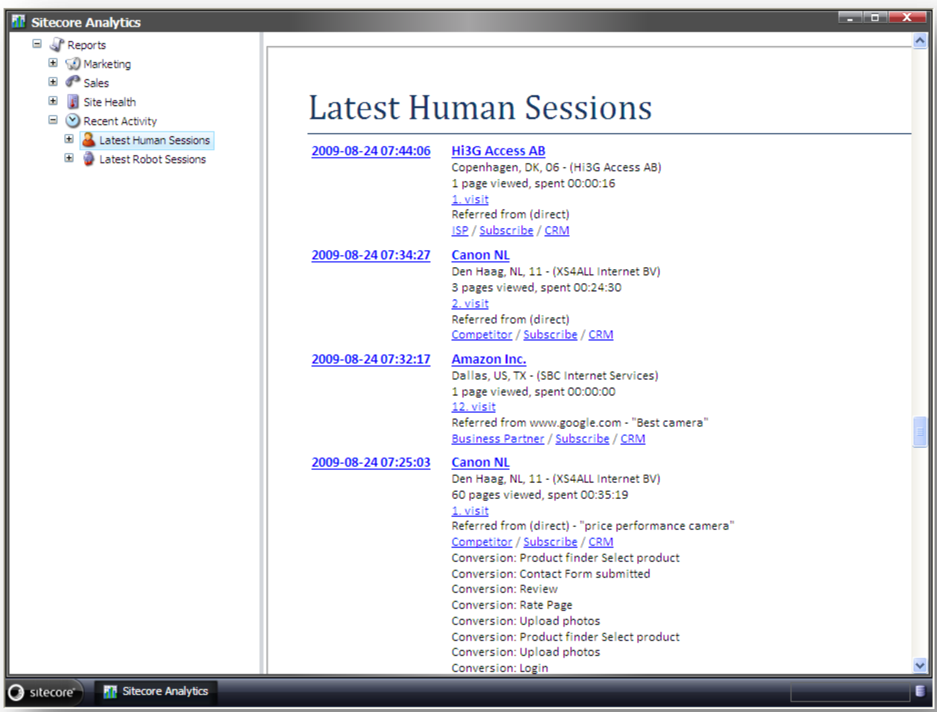
Site Health
Slow pages, not found URLs

Recent Activity
Latest Human and Robot Sessions

To open a Sitecore Analytics report:

1. In the Sitecore Desktop, click the **Sitecore** button and then click **Sitecore Analytics**.
2. In **Sitecore Analytics**, click the node you want to expand, such as *Recent Activity*, and then click the *Latest Human Sessions* report.

   The report is displayed in the right-hand panel of the **Sitecore Analytics** window.



Marketing

The following table summarizes the reports you can find under the *Marketing* node:

Marketing Reports	**Description**
Campaigns	Lists all the campaigns.
Campaign Details	Lists all the campaign definition items and campaign events. Displays statistics on: • Number of visits. • Goal conversion rates. • Profile scores.
Campaign Summary	Lists all the campaign definition items. Displays statistics on: • Number of visits. • Goal conversion rates. • Profile scores.
Conversion and Profile Tracking	Displays the total goals achieved by all site visitors.
Tracking – First Time Visitors	Displays the goals achieved by first time visitors.
Tracking – Returning Visitors	Displays the goals achieved by returning visitors.
Downloads	Displays a list of all the items that have been downloaded with the most recent first.
Metrics	Displays the total visits, total page views and the average page views per visit for the website. Graphs illustrate the number of visitors and the number of page views.
Metrics New Visitors	For new visitors this report displays: • Total visits. • Total page views. • Average page views per visit. Graphs illustrate the number of visitors and the number of page views.
Metrics Returning Visitors	For returning visitors, this report displays: • Total visits. • Total page views. • Average page views per visit. Graphs illustrate the number of visitors and the number of page views.
MV Tests	For each MV Test, you can view: • Percentage of session visits per test variable. • Number of session visits per test variable. • Percentage of session conversions per test variable. • Number of session conversions per test variable.
Site Search	Lists all the searches made on the website.

Marketing Reports	Description
Top Exit Pages	Lists the most popular pages viewed before visitors leave the website.
Top External Search Keywords	Lists the top words used in search engines such as Google, Yahoo and Live Search that led the visitor to your website.
Top Landing Pages	Visitor entry point. This report displays a list of all the web pages that were viewed first on the website.
Top Pages	The most viewed pages on the web site ranked in order of popularity.
Top Traffic Pages	A list of the websites that visitors have come from. For example Google.com, if a visitor found the site from a Google search.

Sales

You can configure the sales area to display your own reports. For example, if you decide to record lead scores, you can display lead reports for your sales team.

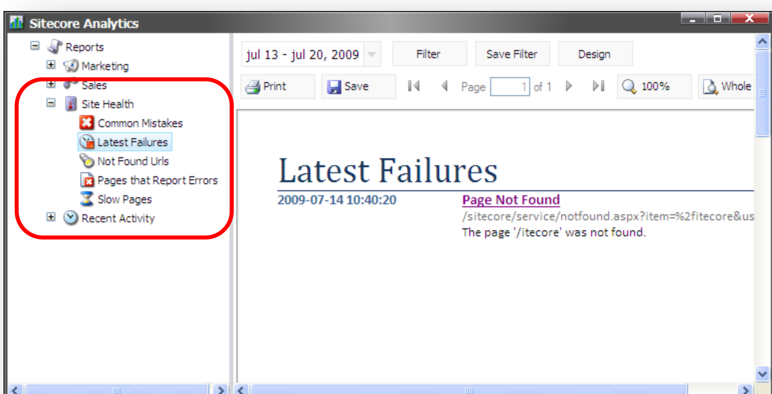
It is possible to identify competitors here. Analyst and press reports are constructed in a similar way to competitor reports.

Your site administrator can help you to configure reports for this area.

Site Health

Site Health contains reports on any failures that occur on your website. Site Health Reports can help you identify potential problems with your website or on your web servers. This is useful information that could highlight potential problem areas that require further investigation.

Expand the *Site Health* node to view all the available reports:



Site Health Reports	Description
Common Mistakes	List the most common mistakes that occur on the web site, such as, no search hits found, user subscription failed, login failed, and so on.

Site Health Reports	Description
Latest Failures	Lists all the latest failures on the web site, for example, if a visitor had difficulty logging in or if a visitor performed a local search that gave 0 results.
Not Found URLs	Lists all the URLs that were not found. If a URL is listed as *Direct*, it means that the visitor typed the address incorrectly into the browser. These are the most common not found URLs.
Pages that Report Errors	Lists all the pages that report errors.
Slow Pages	Lists all the pages that loaded slowly with the slowest listed first.

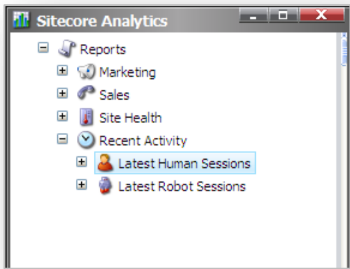
Recent Activity

Recent activity reports record the latest visits to your website.

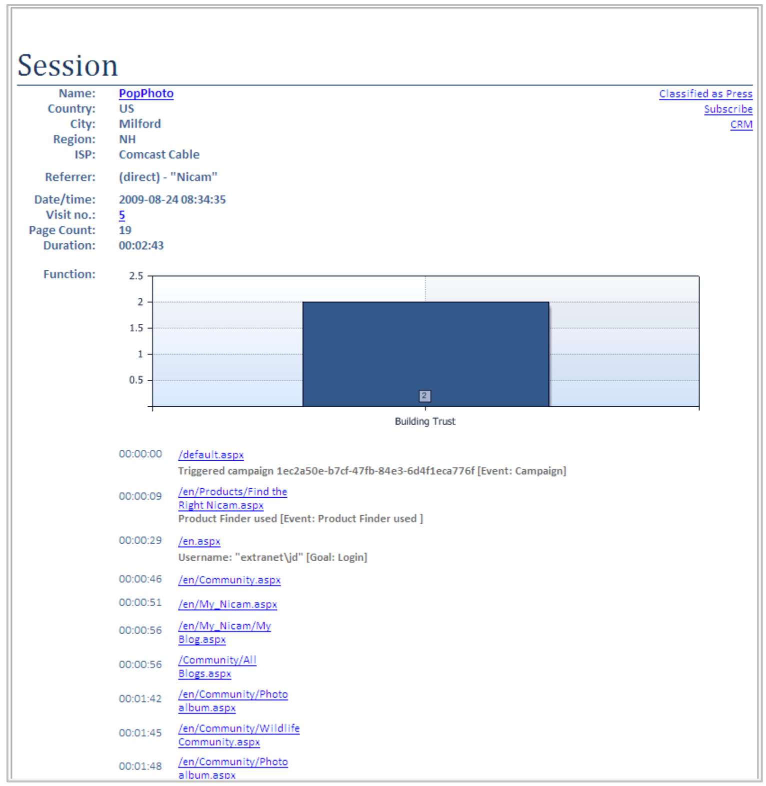
Recent Activity Reports	Description
Latest Human Sessions	Lists all the human visitor sessions to your website (including active sessions), with the most recent listed first.
Latest Company Sessions	List all company sessions, if the visitor has been classified as a company.
Latest ISP Sessions	List all ISP sessions, if the visitor has been classified as an ISP.
Unidentified Sessions	Lists all unidentified visitor sessions.
Latest Robot Sessions	Lists all the latest robot sessions. For example, web bots, malicious robots
Latest Auto Detected Robots	Lists all the robots that have been detected automatically.

4.2 Viewing the Session Trail

Open the *Latest Human Sessions* report, to see a list of all the visits to your website, with the most recent first:



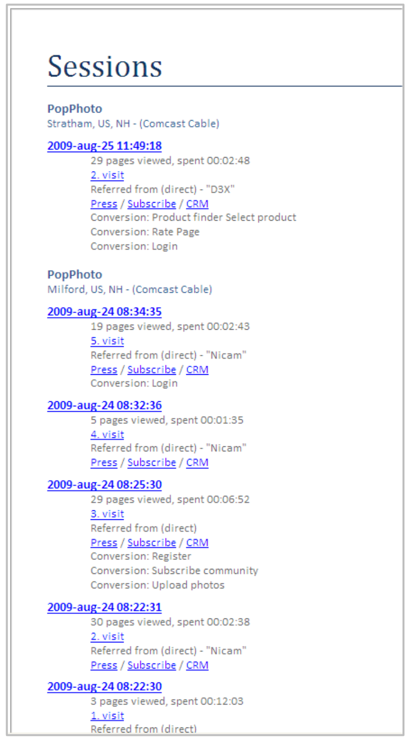
Click the date stamp of an individual session to open the *Session* report and see the details of that session:



The *Session* report shows all the details of this site visit:

Session Report Details	Description
Name	Visitor company or organization.
Country	Visitor country of origin (based on IP address).
City	Visitor city of origin.
Region	Code specifying the region.
ISP	Name of Internet Service Provider.
Referrer	Web site where search originated, for example Google.com.
Date/time	Date stamp of visit.
Visit no.	Sequential visit number.
Page Count	The number of pages viewed on the site during this visit.
Duration	The length of time the visit lasted.
Profile values	Bar charts displaying profile scores for each profile key.
Session trail	All the web pages viewed during this site visit and hyperlinks that link back to the actual web pages. Each URL is listed with a timing associated with it.

Click the name of a visitor to open the *Sessions* report and see a list of all their visits to your website listed by date.



Click on one of these sessions, to open the *Session* report and see detailed information about that particular session.

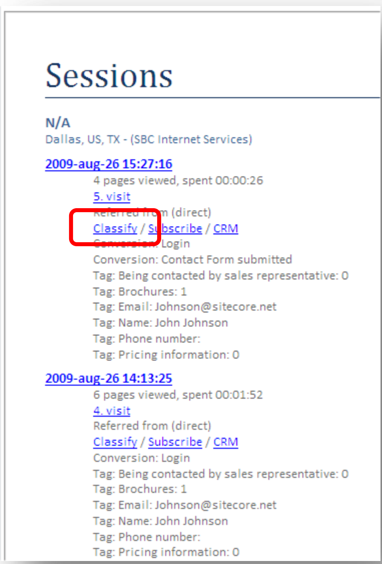
4.3 Classifying Site Visitors

Sitecore analytics lets you classify the visitors that come to your website. You can classify visitors as coming from your own company, as competitors, as robots, and so on. These classifications can then be used to filter your statistics thereby improving their quality, and ultimately to improve your visitor segmentation.

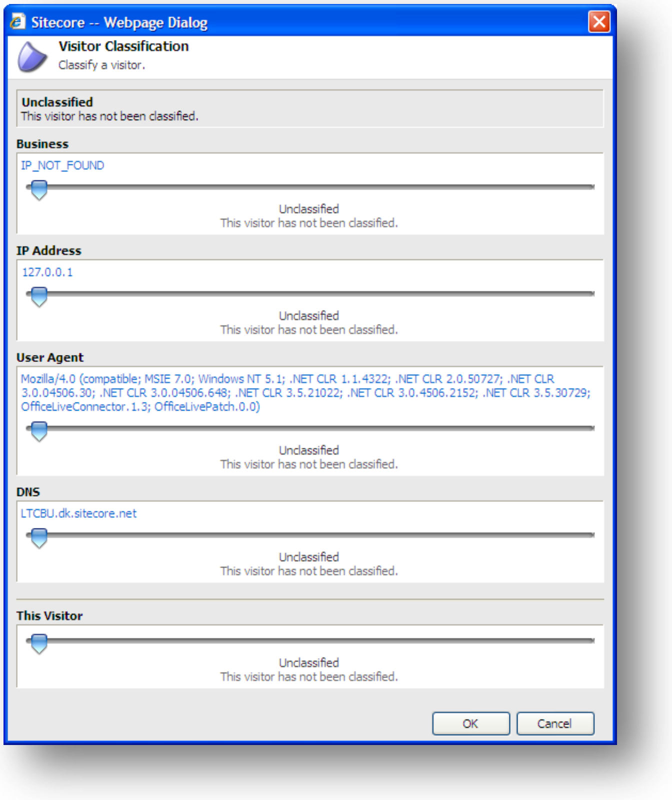
We recommend that you classify site visitors early and often to make your site statistics more meaningful. Classifying visitors benefits your organization, helps enable your sales force, and makes the task of personalizing content easier.

To classify a site visitor:

1. Open **Sitecore Analytics**.
2. Expand *Recent Activity* and then click the *Latest Human Sessions* report.
3. Select a visitor session that is unclassified.



4. Click **Classify** to open the **Visitor Classification** dialog box.



5. In the **Visitor Classification** dialog box, use the sliders to select appropriate values.

   In the Office Core website we have defined the following values:

Attribute	**Description of values**
Business, IP Address, DNS, This Visitor	Select one of the following values: • Unclassified • Business Visitor • ISP • Existing Customer • Analyst • Press • Supplier • Business Partner • Competitor • My Company • Bot – Feed Reader • Bot – Search Engine • Bot – Unidentified • Bot – Auto-detected • Bot - Malicious

Attribute	Description of values
User Agent	Select one of the following values: • Bot – Feed Reader • Bot – Search Engine • Bot – Unidentified • Bot – Auto-detected • Bot - Malicious

6. Click **OK** to save your changes.

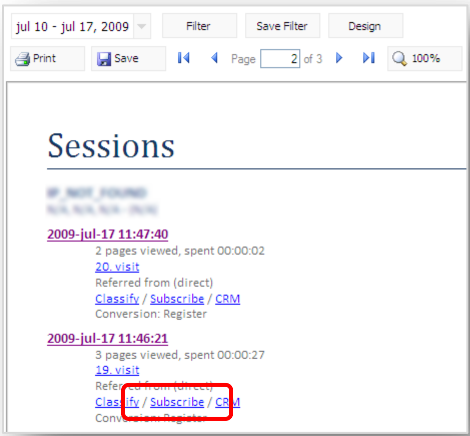
Note
These attributes and values are taken from the Office Core website to illustrate the concept of classification.

4.4 Subscribing to Reports

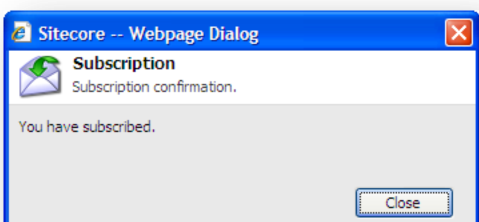
You can subscribe to reports that are of special interest to you. For example, if you subscribe to a report for a specific site visitor, you will be sent a report every time this visitor returns to your website.

To subscribe to a report:

1. Open **Sitecore Analytics**.
2. Open the report that you want to subscribe to.
3. Click **Subscribe**.



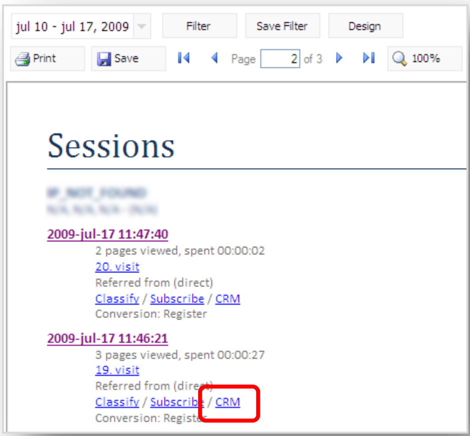
Sitecore already has your e-mail address as part of your Sitecore user information. When you have subscribed to a report, Sitecore displays the following message:



4.5 Linking to CRM

You can also link the Sitecore reports with you CRM system.

If you click on CRM, the message, *not yet implemented* is displayed in a web page.



However, the way in which this link works depends on how CRM integration has been implemented on your website.

For more information about CRM integration, contact your website administrator.

4.6 Saving and Filtering Reports

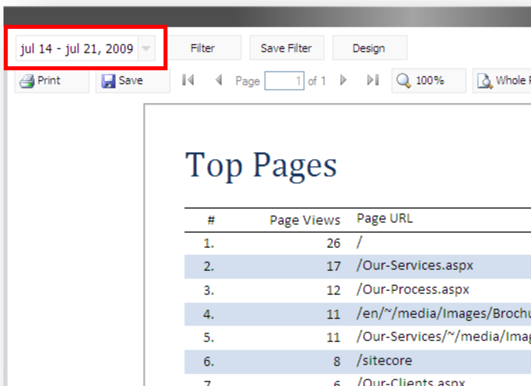
There are various ways in which you can improve the relevance of Sitecore reports.

You can:

- Change the date range used in a report.
- Save a report.
- Place filters on the report.
- Print a report.

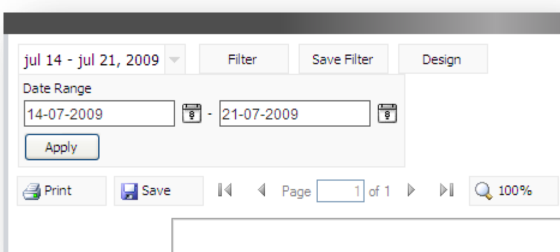
4.6.1 Selecting a Date Range

When you open a report, you can see the date range for the data at the top of the report viewer.



To change the date range of a report:

1. Open a report in **Sitecore Analytics**.
2. Click the date at the top of the report and a date range filter is displayed.



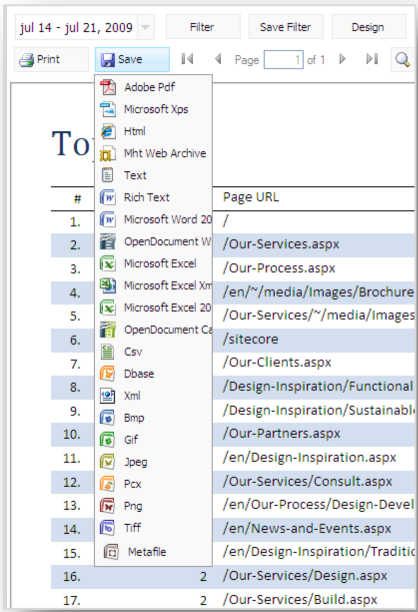
3. In the **Date Range** fields, enter a start and end date directly into the date fields or alternatively click the calendar icons to select a dates.
4. Click **Apply** to update the report and save your date selection.

4.6.2 Saving a Report

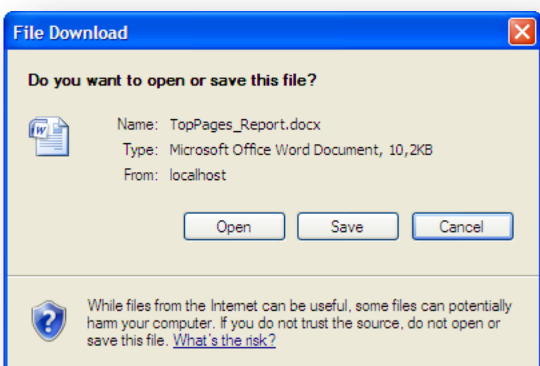
In Sitecore Analytics, you can save a report in a number of different formats, such as, Word, Pdf, XML, Excel, Text file format, and so on. Saving a report in this way is quick and easy.

To save a report:

1. Open **Sitecore Analytics**.
2. Open a report such as the *Top Pages* report.
3. Click **Save** to see the options that are available.



4. Select a file format, for example Microsoft Word 2007.



5. Open or save the report.
6. If you decide to save the report, you can store your report in a local folder.

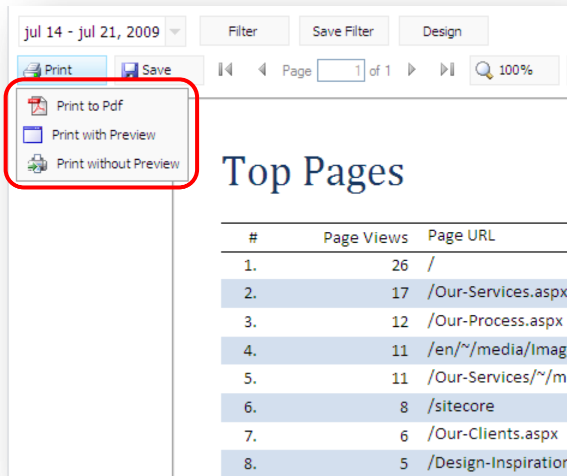
   Follow the same procedure to save the report in any of the other file types.

4.6.3 Printing a Report

When you view a report in Sitecore, you can print it from the report viewer.

To print a report:

1. In **Sitecore Analytics**, open a report, such as the *Top Pages* report.
2. Click **Print**.
3. Select one of the three available options.



Print Option	Description
Print to Pdf	Preview the report as a Pdf document in Adobe Reader or save it as a Pdf file.
Print with Preview	Previews the report in Internet Explorer print format. In Internet Explorer, click File, Print to print the report.
Print without Preview	Displays the **Print** dialog box

4. In the **Print** dialog box, click **Print**.

4.6.4 Filtering a Report

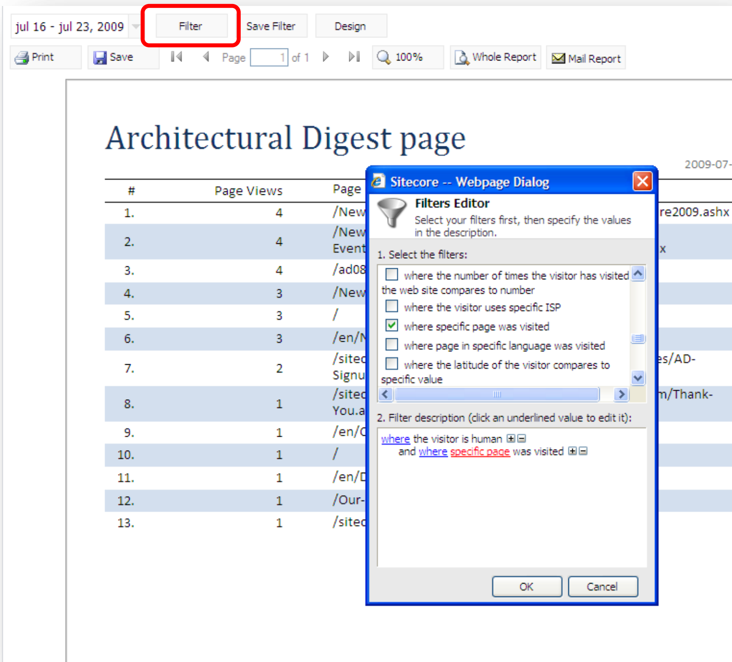
In Sitecore Analytics, you can filter any report to change the data that it contains.

To filter a report:

1. In **Sitecore Analytics**, open a report, such as the *Top Pages* report.

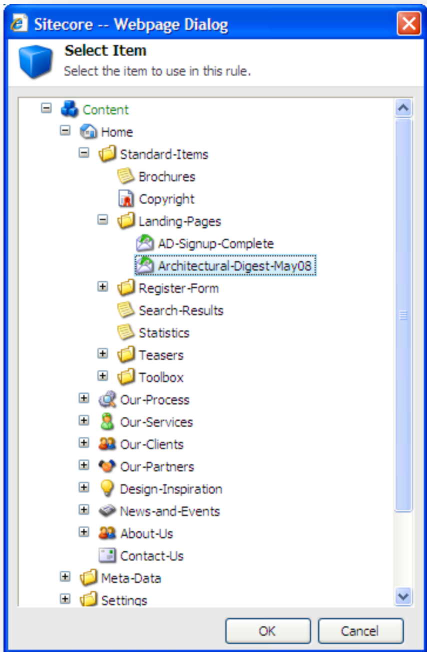
   In this example, we limit the report so that it only displays information about a single page on the website.
2. Right click the existing report and then click **Duplicate**.
3. Give the duplicate report a suitable name, for example, *Architectural Digest Page*.
4. Open the new report.

5. In the new report, click **Filter** to open the **Filters Editor** dialog box.



6. In the **Filters Editor** dialog box, in the **Select the filters** section, select the *where specific page was visited* filter.

7. In the **Filter description** section, click the *specific page* variable to open the **Select Item** dialog box.

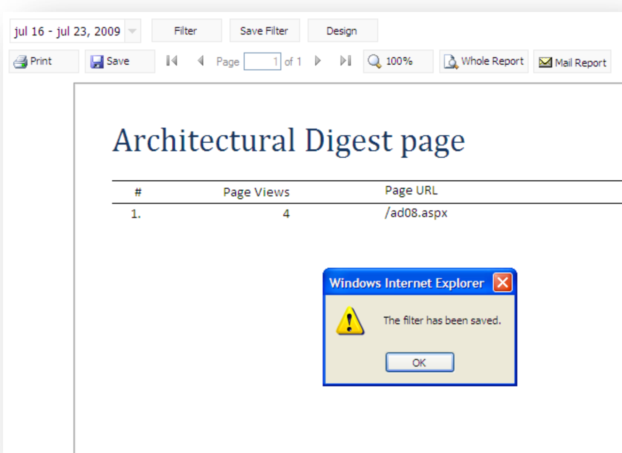


8. In the **Select Item** dialog box, navigate to the page that you want to use in the filter.

   In this example, we use the *Standard-Items/Landing-Pages/Architectural-Digest-May08*.

9. Select the item and click **OK** to save your changes.

10. Click **Save Filter** to save the new filter criteria. Notice that the report only shows the page you specified in the filter.



Note
Administrators can create new filter criteria to expand the selection available in the **Filter Editor**.

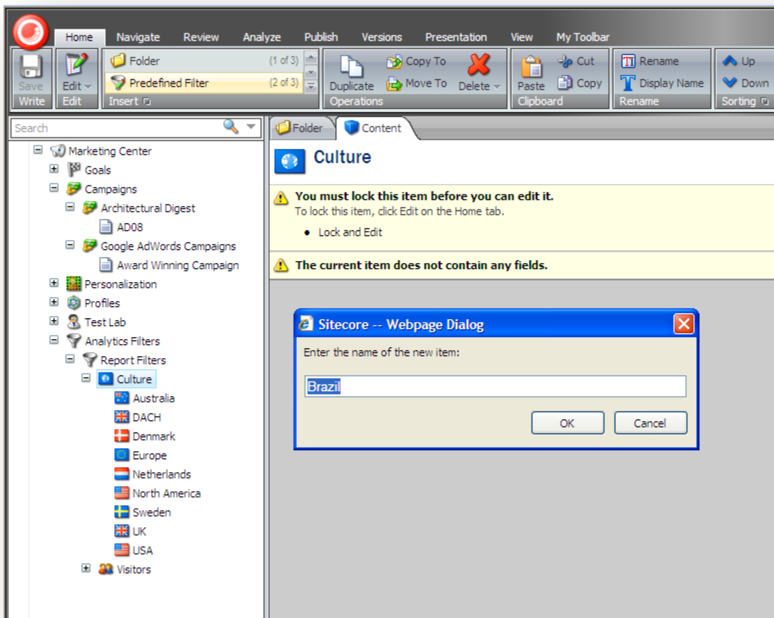
4.6.5 Filtering a Report to Segment Site Visitors

In Sitecore Analytics, you can create filters to segment site visitors according to geography, profile or any other criteria. For example, you might want to create a new filter for a specific county segment, such as Brazil.

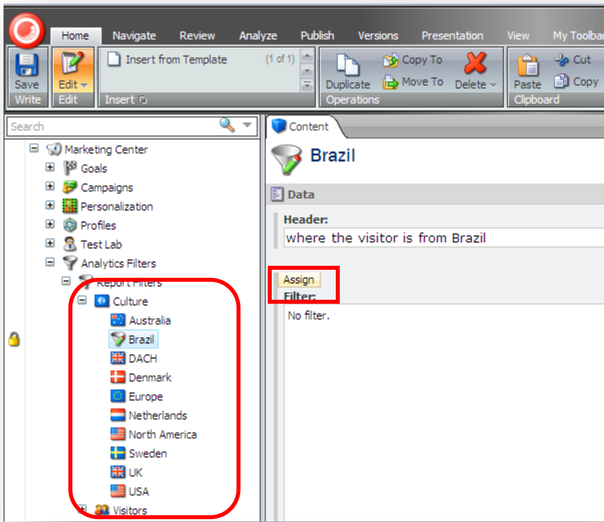
Creating a New Filter

To create a new filter:

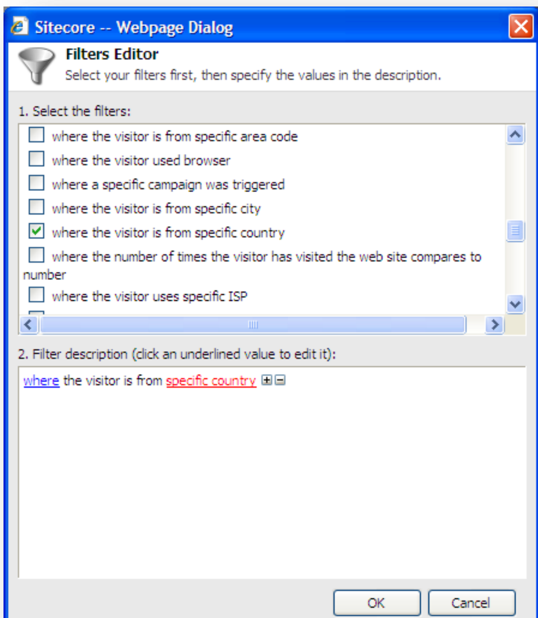
1. Open the **Marketing Center** and in the content tree, navigate to *Analytics Filter/Report Filters/Culture*.
2. In the **Insert** group, click *Predefined Filter*.



3. Call the new item *Brazil*.

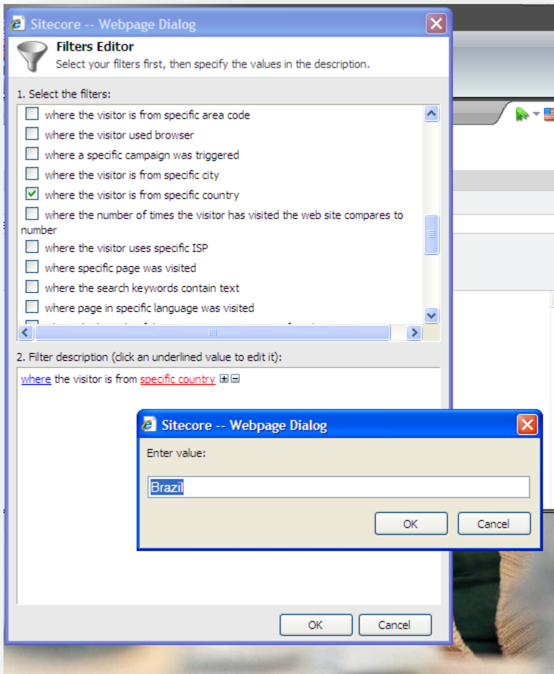


4. In the **Header** field of the new item, type "*where the visitor is from Brazil"*.
5. In the **Filter** field, click **Assign**.



6. In the **Filter Editor** dialog box, select the *Where visitor is from a specific country* filter.
7. In the **Filter description** section, click the *specify country* variable.

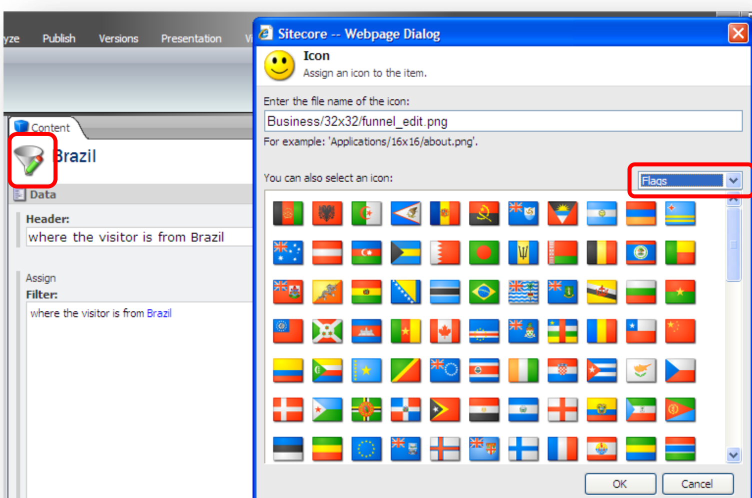
8. In the **Enter value** dialog box, enter *Brazil* or *BR*, which is the country code for Brazil.



9. Click **OK** to close the **Filter Editor** and save your changes.

Assigning an Icon to the Filter

1. To assign an icon to your filter, open the filter item.
2. Click the filter icon in the content item to open the **Icon** dialog box.



3. In the **Icon** dialog box, open the drop down box and select *Flags*.

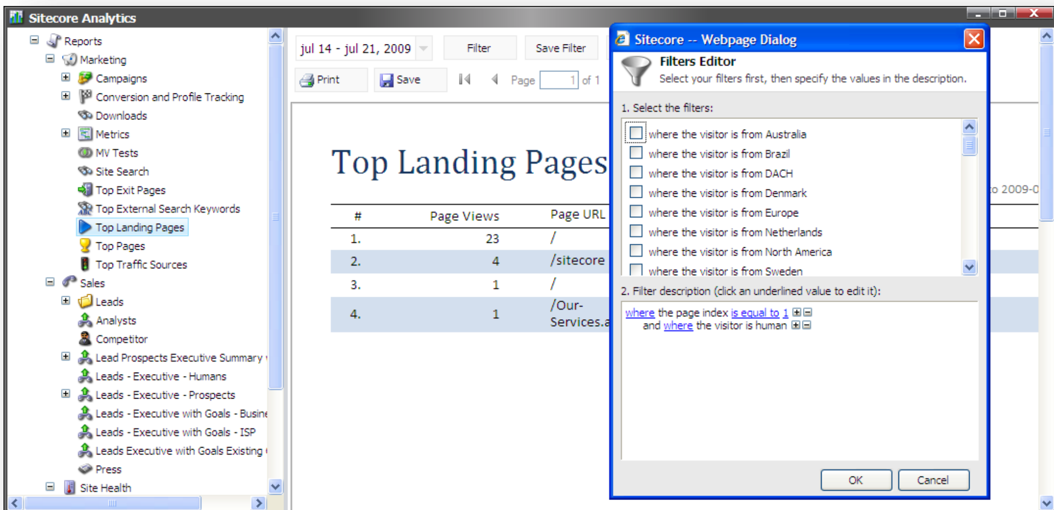
4. Select the icon for the Brazilian flag and click **OK**.

Verifying the New Filter

To verify that the new filter as been created:

1. In the Sitecore Desktop, click the **Sitecore** button and then click **Sitecore Analytics**.
2. In **Sitecore Analytics**, open a report, such as *Top Landing Pages*.
3. Click **Filter**.

   In the **Filter Editor** dialog box, verify that the new *"where the visitor is from Brazil"* filter is displayed in the list:



4. Click **OK** to close the **Filter Editor** dialog box.