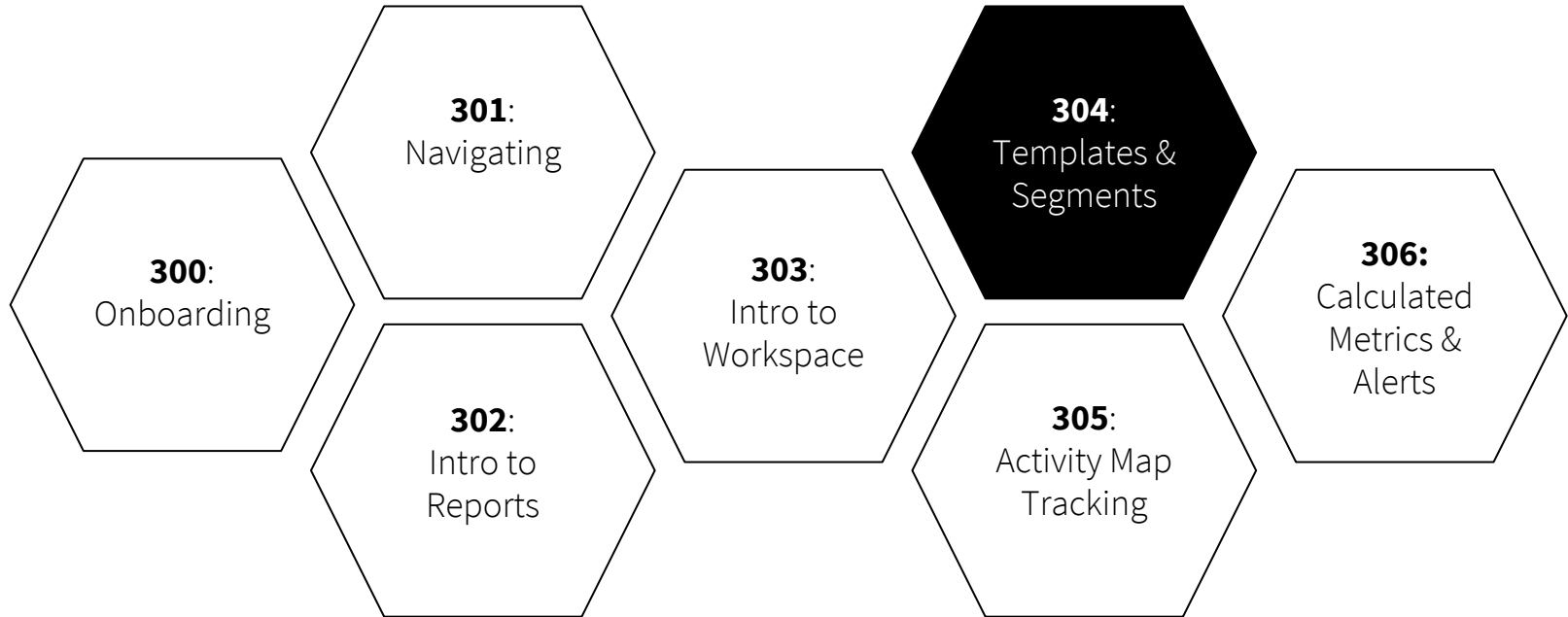


# Templates & Segments

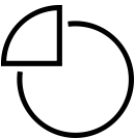
Adobe Analytics - Basic Training



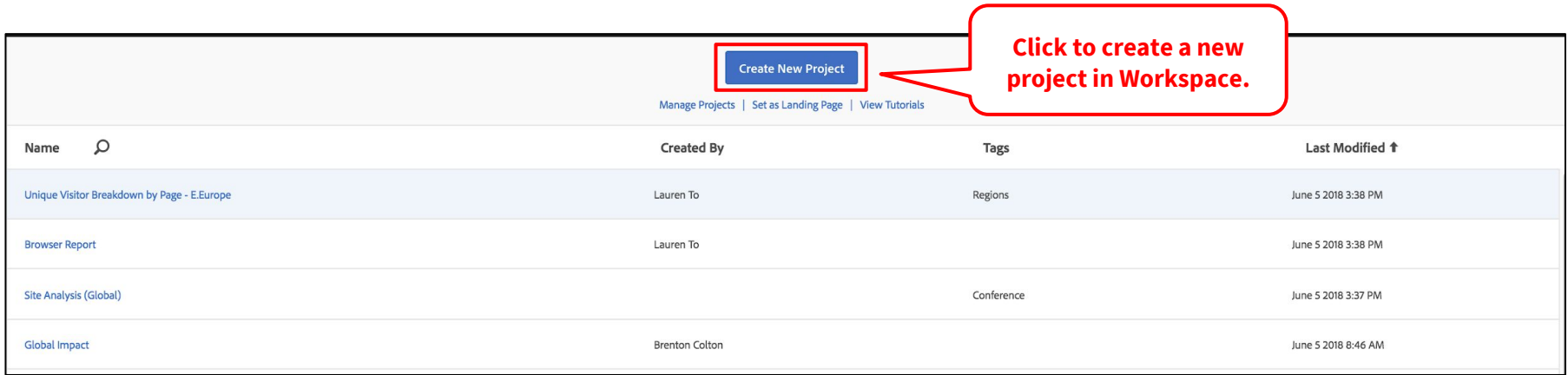
# Adobe Analytics: Basic Training



1. How to create a project **using a template**
2. How to **apply a segment**
3. How to **create a new segment**
4. How to **share a segment**
5. How to **rename and save** a project



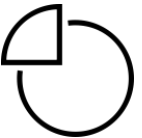
# 1. How to **create a project using a template**



Click to create a new project in Workspace.

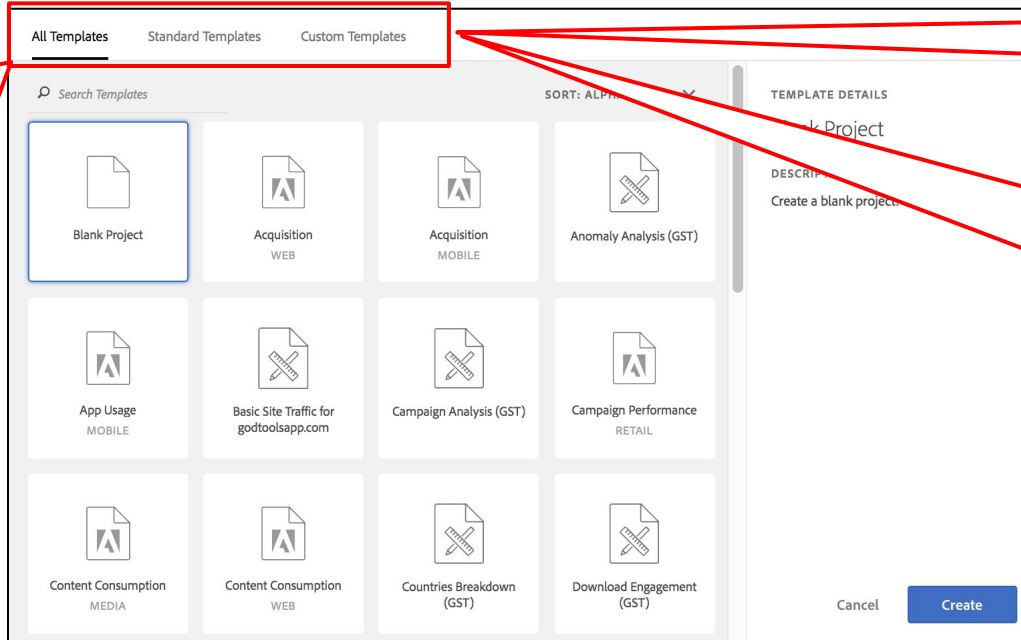
Manage Projects | Set as Landing Page | View Tutorials

Name	Created By	Tags	Last Modified ↑
Unique Visitor Breakdown by Page - E.Europe	Lauren To	Regions	June 5 2018 3:38 PM
Browser Report	Lauren To		June 5 2018 3:38 PM
Site Analysis (Global)		Conference	June 5 2018 3:37 PM
Global Impact	Brenton Colton		June 5 2018 8:46 AM



# 1. How to **create a project using a template**

**Templates are starting points for the analysis you want to perform. They are designed for immediate use.**



**Standard Templates are templates created by Adobe.**

**Custom Templates are templates created by our team at Cru. They are designed to make reporting easier for you.**



# 1. How to **create a project using a template**

**Select 'Custom Templates' to get started.**

The screenshot displays a user interface for selecting project templates. At the top, there are three tabs: 'All Templates', 'Standard Templates', and 'Custom Templates'. The 'Custom Templates' tab is highlighted with a red rectangular box. A red callout bubble with a white background and red border points to this tab, containing the text 'Select 'Custom Templates' to get started.' Below the tabs is a search bar labeled 'Search Templates' and a sort dropdown menu set to 'SORT: ALPHABETICAL'. The main area is a grid of 12 template cards, each with a document icon and a title. The 'Blank Project' card in the top-left corner is highlighted with a blue border. The other templates are: 'Acquisition WEB', 'Acquisition MOBILE', 'Anomaly Analysis (GST)', 'App Usage MOBILE', 'Basic Site Traffic for godtoolsapp.com', 'Campaign Analysis (GST)', 'Campaign Performance RETAIL', 'Content Consumption MEDIA', 'Content Consumption WEB', 'Countries Breakdown (GST)', and 'Download Engagement (GST)'. On the right side, there is a 'TEMPLATE DETAILS' panel for the 'Blank Project' template, showing its description 'Create a blank project.' and two buttons: 'Cancel' and 'Create'.



# 1. How to **create a project using a template**

**Within Custom Templates, there are many templates to choose from.** Any template that includes '(GST)' was created specifically for your use.

If you're just starting off, we recommend using the '**Site Analysis**' template. This template provides key metrics for website reporting.

The screenshot displays the 'Custom Templates' section of a software interface. At the top, there are tabs for 'All Templates', 'Standard Templates', and 'Custom Templates', with 'Custom Templates' being the active tab. A search bar labeled 'Search Templates' and a sort dropdown set to 'ALPHABETICAL' are visible. A grid of 16 template cards is shown, each with a document icon and a title. The 'Anomaly Analysis (GST)' template in the top-left corner is highlighted with a blue border. The 'Site Analysis (GST)' template in the bottom-left corner is highlighted with a red border. To the right of the grid is a 'TEMPLATE DETAILS' panel for the selected 'Anomaly Analysis (GST)' template, showing the author 'Lauren To', creation and modification dates, and a description: 'Template for analyzing data anomalies based on traffic date and events'. Below the description is an 'Edit Template' button. At the bottom right of the interface, there are 'Cancel' and 'Create' buttons, with the 'Create' button highlighted by a red box.

**Once you've selected a template, click Create.**



# 1. How to create a project using a template

The screenshot displays the Adobe Analytics interface for a 'Site Analysis (GST)' report suite. The left sidebar contains navigation menus for DIMENSIONS (Language, Server, Page/Screen Name, Countries, Site/App Name), METRICS (Unique Visitors, Time Spent per Visitor, Bounce Rate, Download Link Instances, Average Time on Site), SEGMENTS (PACT, NAME, Russia, South Asia, East Asia Opportunities), and TIME (Day). The main dashboard area is titled 'Users' and features several key components:

- A large green number '5,003,754' representing Total Unique Visitors.
- A 'New vs. Repeat Visitors' chart showing a donut chart with segments for New (4,749,350, 13.0%), Repeat (730,454, 2.2%), and Unspecified (123,970, 84.8%).
- A 'Countries' bar chart showing Unique Visitors for United States, Nigeria, and China.
- A 'Languages' bar chart showing Unique Visitors for English (United States), English, and English (United Kingdom).

Annotations in red callouts provide additional context:

- A callout pointing to the 'Site Analysis (GST)' title in the top left states: "This is the site analysis template. The template pre-populates data and visualizations based on the current report suite."
- A callout pointing to the 'Cru Global Report Suite' dropdown in the top right states: "This is the report suite. If you access to multiple report suites, ensure that the correct report suite appears."





# 1. How to **create a project using a template**

The screenshot shows the Adobe Analytics Site Analysis (GST) dashboard. On the left, there are panels for DIMENSIONS (Language, Server, Page/Screen Name, Countries, Site/App Name), METRICS (Unique Visitors, Time Spent per Visitor, Bounce Rate, Download Link Instances, Average Time on Site), SEGMENTS (PACT, NAME, Russia, South Asia, East Asia Opportunities), and TIME (Day). The main content area displays a 'Users' section with a large green number '5,003,754' for 'Total Unique Visitors'. To the right, there are charts for 'New vs. Repeat Visitors' (a donut chart showing 4,749,350 New, 730,454 Repeat, and 123,970 Unspecified visitors) and two horizontal bar charts for 'Countries' and 'Languages'. A red callout box with a white background and a red border points to a dashed box in the 'Section 1:' area containing the text 'Drop a Segment Here (or any other component)'. The callout box contains the following text:

**To view data for a specific website, region, etc, drag a segment onto the panel here. For more information on segments, see the next slide.**

Category	Count	Percentage
New	4,749,350	84.8%
Repeat	730,454	13.0%
Unspecified	123,970	2.2%

Country	Unique Visitors
United States	5,003,754
Nigeria	[Small bar]
China	[Small bar]

Language	Unique Visitors
English (United States)	5,003,754
English	[Small bar]
English (United Kingdom)	[Small bar]



## 2. How to apply a **segment**

**To view segments, click the Components icon.**

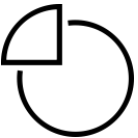
Segments are custom subsets of data. They are based on dimensions, metrics, events, etc.

**Segments are indicated by the blue people icon.**

The screenshot displays the 'Site Analysis (GST)' application interface. At the top, there is a menu bar with 'Project', 'Edit', 'Insert', 'Components', 'Share', and 'Help'. Below the menu, there are buttons for '+ New' and 'Actions'. A search bar labeled 'Search Components' is present. The main content area is divided into several sections:

- COMPONENTS:** A list of components including 'Page/Screen Name', 'Countries', and 'Site/App Name (evar44)'. A red box highlights a 'Components' icon (a grid of squares) on the left side of the interface.
- METRICS:** A list of metrics including 'Unique Visitors', 'Time Spent per Visitor (seconds)', 'Bounce Rate', 'Download Link Instances', and 'Average Time on Site'.
- SEGMENTS:** A list of segments including 'PACT', 'NAME', 'Russia', 'South Asia', and 'East Asia Opportunities'. A red box highlights a blue 'people' icon (three stylized figures) next to the 'NAME' segment.

On the right side, there is a 'Site Analysis (G)' panel with a 'Drop a Segment Here' area and a 'Section 1:' label. A large green number '5' is displayed in the bottom right corner of the interface.



## 2. How to apply a **segment**

A few ways to segment data within a template:



**Your website**

Example: [www.cru.org](http://www.cru.org)



**Your app**

Example: Mission Hub



**Browser language**

Example: Arabic



**Your country or region**

Example: Algeria or NAME



## 2. How to apply a **segment**

To segment data, drag and drop one or more segments onto the panel here. For example, let's select South Asia.

The screenshot shows a web analytics dashboard for 'Country Project'. The left sidebar contains three sections: DIMENSIONS, METRICS, and SEGMENTS. The SEGMENTS section lists 'PACT', 'NAME', 'Russia', 'South Asia', and 'South East Asia'. The 'South Asia' segment is highlighted with a red box. The main panel shows a bar chart for 'Unique Visitors' and a table for 'Visitor Data by Country'. A red box highlights the instruction 'Drop a Segment Here (or any other component)' in the main panel.

Country Project

Drop a Segment Here (or any other component)

Bar

Unique Visitors

Visitor Data by Country

Countries
1. United States
Server
1. www.familylife.com
2. www.cru.org



## 2. How to apply a **segment**

Country Project ☆ *There are unsaved changes*  
Project Edit Insert Components Share Help

+ New Actions

Search Components

**DIMENSIONS**

- Language
- Server
- Page/Screen Name
- Countries
- Site/App Name (evar44)

**METRICS**

- Unique Visitors
- Time Spent per Visitor (seconds)
- Bounce Rate
- Download Link Instances
- Average Time on Site

**SEGMENTS**

- PACT
- NAME
- Russia
- South Asia
- South East Asia

Country Project

South Asia Add Segment

Bar

Unique Visitors

10,000.00

Unite

geria

● Visitor Data by Country

Countries	Unique Visitors	Time Spent per V
Page: 1 / 1 Rows: 50 1-6 of 6	Jun 1 Jun 30 ↓19,255	Jun 1
1. India	16,760 87.0%	
Server	Jun 1 Jun 30 16,760	Jun 1
Page: 1 / 7 > Rows: 10 1-10 of 67		
1. www.jesusfilm.org	3,414 20.4%	
2. www.familylife.com	2,929 17.5%	

**Voila! The data in the panel is now segmented by South Asia.**

**You can drop multiple segments into the panel.** However with multiple segments, an AND statement is created. Thus all conditions must be true for data to populate.



## 2. How to apply a **segment**

The screenshot displays a web analytics dashboard with three main sections: METRICS, SEGMENTS, and TIME. The METRICS section lists Unique Visitors, Time Spent per Visitor (seconds), Bounce Rate, Download Link Instances, and Average Time on Site. The SEGMENTS section lists PACT, NAME, Russia, South Asia, and East Asia Opportunities. The TIME section lists Day, Last month, 2 days ago, and 3 days ago. A red box highlights the 'i' icon next to the South Asia segment. A callout box explains that this segment includes visits where the IP address equals countries in South Asia (e.g. Bhutan, India, etc.). A detailed view of the South Asia segment is shown, including a table of metrics and a bar chart.

**METRICS**

- Unique Visitors
- Time Spent per Visitor (seconds)
- Bounce Rate
- Download Link Instances
- Average Time on Site

**SEGMENTS**

- PACT
- NAME
- Russia
- South Asia
- East Asia Opportunities

**TIME**

- Day
- Last month
- 2 days ago
- 3 days ago

**South Asia**

South Asia Region Segment

**VISIT**

- Countries = Bangladesh
- OR -
- Countries = Bhutan
- OR -
- Countries = India
- OR -
- Countries = Maldives
- OR -
- Countries = Nepal
- OR -
- Countries = Sri Lanka

Unique Visitors	142,452 of 5,006,759	2%
Visits	186,376 of 7,342,119	2%
Page Views	449,038 of 20,310,782	2%
Visitors with Experience Cloud ID	141,825 of 4,941,701	2%

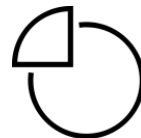
\*Last 90 days

United States

Nigeria

To see what data is included in a segment, hover over the segment, and click the “i” icon.

For example, this segment includes visits where the IP address equals countries in South Asia (e.g. Bhutan, India, etc).

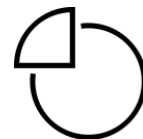


### 3. How to **create a new segment**

Within a project, click the **+New** icon.

Click **Create Segment**.

The screenshot displays the Adobe Analytics interface for a project named 'Country Project'. The top navigation bar includes 'Workspace', 'Reports', 'Components', 'Tools', and 'Admin'. Below this, the project name 'Country Project' is shown with a star icon and a sub-menu with 'Project', 'Edit', 'Insert', 'Components', 'Share', and 'Help'. A '+ New' button is highlighted with a red box, and a callout points to it with the text 'Within a project, click the +New icon.' A dropdown menu titled 'New Component' is open, showing options: 'Create Metric', 'Create Segment' (highlighted with a red box and a callout 'Click Create Segment.'), and 'Create Date Range'. Below the menu, a list of components is visible: 'Countries', 'Site/App Name (evar44)', and 'Mobile Device'. Under the 'METRICS' section, 'Unique Visitors' and 'Time Spent per Visitor (seconds)' are listed. The main content area shows a bar chart for 'Unique Visitors' in the 'United States' category, with a value of approximately 300,000.00. A legend indicates 'Time Spent per Visitor (seconds)' is represented by a blue square.



### 3. How to **create a new segment**

The screenshot shows the Segment Builder interface. A red box highlights the TITLE, DESCRIPTION, and TAGS fields. Callouts provide instructions for each field. The DEFINITION section is also visible, showing a 'Show Hit' dropdown and a 'Drag & drop Metric(s), Segment(s), and/or Dimensions here.' area. A checkbox at the bottom left reads 'Make this an Experience Cloud audience (for Cru Global Report Suite)'. On the right, there is a 'Metrics' table and a 'Product Compatibility' section.

Metric	Value	Percentage
Unique Visitors	5,235,428 of 5,235,428	100%
Visits	7,585,424 of 7,585,424	100%
Page Views	20,696,900 of 20,696,900	100%
Visitors with Experience Cloud ID	5,167,566 of 5,167,566	100%

\* Last 90 days

Product Compatibility ⓘ

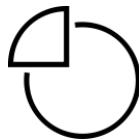
Analysis Workspace  
Reports & Analytics  
Ad Hoc Analysis  
Data Warehouse

Options

**Enter a title & description for your segment.** You must provide a description if you want to share the segment.

Tags let you tag the segment you are creating by picking from a list of existing tags or creating a new tag.

**For example, to create a segment for cru.org, title the segment Cru.org and add a description.**





### 3. How to **create a new segment**

The screenshot shows the Segment Builder interface. On the left, there is a panel with 'DIMENSIONS' and 'METRICS'. The 'Server' dimension is highlighted with a red box. An arrow points from this box to a larger red box in the 'DEFINITION' section, which contains 'Server equals'. Another arrow points from a search box containing 'www' to a dropdown menu showing 'www.cru.org' as the selected option. The search box and dropdown are also highlighted with a red box. The main area shows the segment definition for 'Cru.org' with the description 'website = cru.org' and the tag 'Cru.org'. The right side of the interface shows a circular progress indicator and a table of metrics.

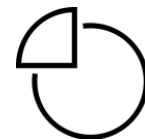
Metric	Count	Percentage
Unique Visitors	0 of 5,235,428	0%
Visits	0 of 7,585,429	0%
Page Views	0 of 20,696,912	0%
Visitors with Experience Cloud ID	0 of 5,167,566	0%

Product Compatibility ⓘ  
Analysis Workspace  
Reports & Analytics  
Ad Hoc Analysis  
Data Warehouse

**Drag a dimension or metric from the left panel into the box.**

For websites, use the Server dimension.

**Search for a specific server by typing in the website URL.**



### 3. How to **create a new segment**

**Click Save to save the segment.**

The screenshot shows the 'Create Segment' interface. The 'TITLE' field contains 'Cru.org'. The 'DESCRIPTION' field contains 'website = cru.org'. The 'TAGS' section shows 'Cru.org'. The 'DEFINITION' section shows a dropdown menu with 'Hit' selected. A search bar contains 'www.cru.org'. The 'Make this an Experience Cloud audience' checkbox is checked. A 'Save' button is highlighted in the top right corner.

**Select a top container for the segment.**  
Hit is the default container.

Category	Value	Percentage
Unique Visitors	5,235,428 of 5,235,428	100%
Visits	7,585,429 of 7,585,429	100%
Page Views	20,696,912 of 20,696,912	100%
Visitors with Experience Cloud ID	5,167,566 of 5,167,566	100%

\* Last 90 days

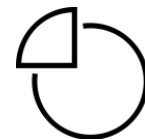
Product Compatibility ⓘ

- Analysis Workspace
- Reports & Analytics
- Ad Hoc Analysis
- Data Warehouse

Options

Make this an Experience Cloud audience (for Cru Global Report Suite) ⓘ

**Check this box if you want the segment to be available in the Segment Library.**

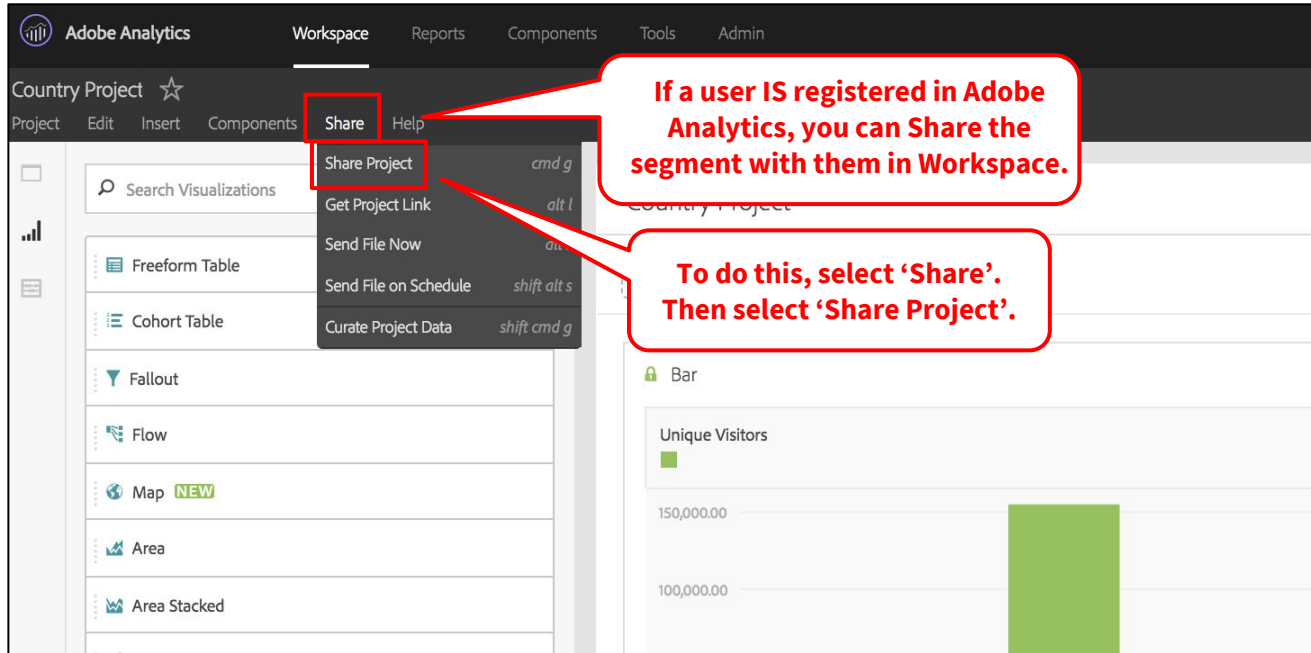


### 3. How to **create a new segment**

The screenshot shows a web analytics dashboard for a project named "Country Project". On the left, there are sections for "DIMENSIONS" (Language, Server, Countries, Site/App Name, Mobile Device) and "METRICS" (Unique Visitors, Time Spent per Visitor, Bounce Rate, Download Link Instances, Average Time on Site). Below these is a "SEGMENTS" list where a new segment "Cru.org" has been added at the top. A red callout box points to this segment with the text: "The segment that you created will appear at the top of the list of segments." On the right, a bar chart titled "Unique Visitors" shows data for "United States". A red callout box points to the "Cru.org" segment in the top navigation area with the text: "Drag the segment onto the panel. Your data will be filtered by the segment." Below the chart is a table titled "Visitor Data by Country" with columns for "Countries", "Page: 1 / 5", "Rows: 50", and "1-50 of 202".



## 5. How to **share a segment**



The screenshot shows the Adobe Analytics Workspace interface. The top navigation bar includes 'Adobe Analytics', 'Workspace', 'Reports', 'Components', 'Tools', and 'Admin'. Below this, the 'Country Project' is selected. The 'Share' menu is open, showing options: 'Share Project', 'Get Project Link', 'Send File Now', 'Send File on Schedule', and 'Curate Project Data'. The 'Share Project' option is highlighted with a red box. Two red callout boxes provide instructions: 'If a user IS registered in Adobe Analytics, you can Share the segment with them in Workspace.' and 'To do this, select 'Share'. Then select 'Share Project'.'

**If a user IS registered in Adobe Analytics, you can Share the segment with them in Workspace.**

**To do this, select 'Share'. Then select 'Share Project'.**

The main content area displays a 'Bar' chart titled 'Unique Visitors' with a single green bar reaching approximately 150,000.00. The y-axis has markers at 100,000.00 and 150,000.00.



## 5. How to **share a segment**

Time Spent per Visitor (seconds)

Share Project ×

NAME  
Country Project

DESCRIPTION  
visitor data by country

TAGS  
Global × ∨

RECIPIENTS  
Add Recipients ∨

OTHER OPTIONS ⓘ  
 Automatically Share Embedded Components with Recipients

Cancel Share

Check this box to share any **segments** or components in the project with recipients.

**Add recipients.** Recipients will only appear if they are a user in Adobe Analytics.

**Click Share.** The project will appear in that user's project list in Workspace. Best practice is to inform recipients as Adobe does NOT notify them.



# Try segmenting data by:



## Your website

**Example:** [www.cru.org](http://www.cru.org)

You will need to create a NEW segment using the **Server** dimension. \*Jump to 'How to create a new segment' section.



## Your app

**Example:** Mission Hub

This segment should already exist. Search for the **Site/App Name** dimension. Hover over the arrow and select an App from the drop down.



## Browser language

**Example:** Arabic

This segment should already exist. Search for the **Language** dimension. Hover over the arrow and select a language from the drop down.



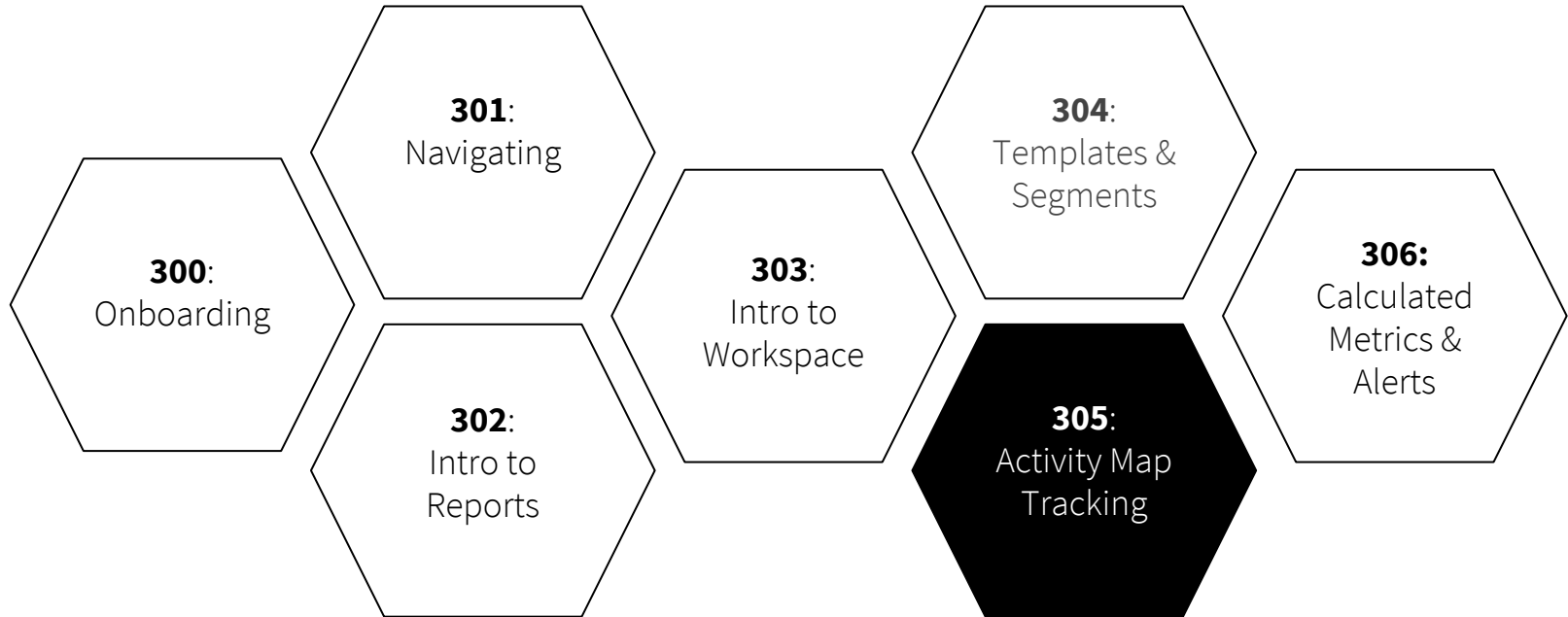
## Your country or region

**Example:** Algeria or NAME

Search for the **Countries** or **Regions** dimension. Hover over the arrow and select the country or region from the drop down.



## Next Module: Activity Map Tracking >>



# Complete!

**Questions?**

dps-growtholutions@cru.org