Unica NetInsight OnDemand

Version 8.1.5

Power User's Guide

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Contacting Unica technical support

If you encounter a problem that you cannot resolve by consulting the documentation, your company's designated support contact can log a call with Unica technical support. Use the information in this section to ensure that your problem is resolved efficiently and successfully.

If you are not a designated support contact at your company, contact your Unica administrator for information.

Information you should gather

Before you contact Unica technical support, you should gather the following information:

• A brief description of the nature of your issue.

• Detailed error messages you see when the issue occurs.

• Detailed steps to reproduce the issue.

Contact information for Unica technical support

For ways to contact Unica technical support, see the Unica Product Technical Support web site: (http://www.unica.com/about/product-technical-support.htm).

1 Introduction to Unica NetInsight OnDemand

- ■ About Unica NetInsight
- ■ About roles in Unica NetInsight OnDemand
- ■ About this guide
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About Unica NetInsight

Unica NetInsight provides the critical information and insight you need to improve web site design, internet marketing effectiveness, and your customer's experience.

Using Unica NetInsight, you can identify which content is popular and which is ignored. You can see where users are dropping off your site.

Unica NetInsight lets you analyze online campaigns (including media buys, email, and search engine marketing) and offline campaigns (including direct mail, catalog, and call center activities). You can even analyze the response to campaigns across channels.

About roles in Unica NetInsight OnDemand

Every user of Unica NetInsight OnDemand is assigned a role by the Unica NetInsight administrator in his or her organization.

Your role determines the actions you can perform and the interface elements you see. There are four standard roles available in Unica NetInsight OnDemand:

- • Business User
- • Enhanced Business User
- • Power User

- OnDemand Administrator

Your administrator can tell you what your role is.

About this guide

This guide contains information about the additional capabilities granted by the Power User role over and above the capabilities in the Enhanced User Role. Consult the *NetInsight OnDemand Reports Users Guide* for information about capabilities both roles have in common.

To log on to NetInsight

1. In your Web browser, enter the URL your Unica NetInsight administrator gave you. The Unica NetInsight User Logon page appears.

2. In the **User name** box, enter the user name your Unica NetInsight administrator gave you. (The user name is case-insensitive.)

3. In the **Password** box, enter your Unica NetInsight password.

4. Click **Log on**.

2 Working with reports

- Working with reports
- To rename a report
- To remove a report
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- Archiving Reports

Working with reports

This section provides information on the report tasks that require the Power User role or higher.

To rename a report

1. In the Profile containing the report, click the **Custom** tab, select the report you want to rename, and click **Edit Report**.

   You can also display the report you want to rename and click the Report Designer

   icon (   ).

   The **Report Summary** screen opens.

2. Click **Report title**.

   The **Report description** screen opens.

3. In the **Report title** field, enter the new name you want for the report.

4. Click **Continue**.

To remove a report

Removing the report deletes it from the Custom Report Wizard and from the list of available reports on the **Reports** tab. However, removing a report does not delete any archived copies of the report.

1. View the profile that contains the report you want to delete.

2. Click the **Custom** tab.

3. Select the report you want to remove.

4. Click **Remove Report**.

The specified report is permanently removed.

Emailing reports

- Emailing multiple reports and emailing reports automatically
- To create an email task
- To create an email alert

Emailing multiple reports and emailing reports automatically

If you routinely send the same reports to the same people, you can create one or more email tasks which specify which reports should go to which recipients and in which format.

You can also create an email alert that executes an email task if the value of a specified metric meets the criteria you specify for the alert.

Reports sent as part of an email task or email alert always are sent in Full mode.

To create an email task

- To create an email task
- To add or edit reports for an email task
- To add or edit recipients for an email task
- To test an email task
- To execute an email task
- To edit an email task
- To delete an email task

To create an email task

1. While working with a profile containing the reports you want to email, click **Options**.

2. In the left panel, under **Email**, click **Email Tasks**.

   The **Available email tasks** screen opens.

3. Click **Add**.

   The **Email task description** screen opens.

4. In the **Name of task** field, enter the name you want displayed for this email task in the **Available email tasks** list.

   Use a name that clearly identifies the task.

5. In the **From address** field, enter the email address from which the reports in this email task will be mailed to users.

   Any email messages returned as undeliverable, as well as any replies sent by recipients, are sent to this address.

   ☼ If you do not enter an address, Unica NetInsight uses the email address specified for the **From address** option in the administrative options.

6. In the **Subject of email** field, enter the text you want to appear in the subject line of the email the recipients receive.

7. In the **Format of reports** list, select the report format you want to use.

8. In the **Time period list**, select the time period for which the metric will be calculated.

9. If you have scheduled the `-email` command-line option to automatically execute all the email tasks for this profile but you do not want this email task executed with the group, select the **Exclude from batch execution** check box.

   This email task is then executed only when you use the `-emailtask` command-line option or select the task in the **Available email tasks** list and click **Execute**.

   ☼ This option is especially useful when most of your email tasks are executed daily and you want to create a task that executes weekly, monthly, or quarterly.

10. In the **Additional text** field, enter the text you want to include in the body of the email message that contains the reports and graphs.

    For example, you could include descriptions of the data contained in each report.

11. Click **Save Options** and then click **Continue**.

Before the email task is functional, you must:

- Add one or more reports to the email task

- Add one or more recipients to the email task

To add or edit reports for an email task

You must create the email task to add reports to before completing the instructions below.

When you execute an email task, Unica NetInsight includes all the reports in the email task in one email message. You can specify the order in which you want the reports to appear when you add reports to the email task.

1. While working with the profile, click **Options**.

2. In the **Options** panel, under **Email**, click **Email Tasks**.

   The **Available email tasks** screen opens.

3. Select the email task to add reports to.

4. Click **Reports**.

   The **Reports to be sent for profile** screen opens.

5. Select reports in the **Available reports** list and use the right arrow button to move reports you want to send to the **Selected reports** list. You can use the left arrow button to remove any reports you do not want to send.

6. Select reports in the **Selected reports** list and use the up and down buttons to adjust the order of reports to be included.

7. When all the reports you want to include are in the **Selected reports** list and in the desired order, click **Save Options** and then click **Continue**.

To add or edit recipients for an email task

You must create the email task to add recipients to before completing the instructions below.

If the list of recipients is particularly long, you may want to contact your email administrator about creating an alias for multiple email addresses on your mail server. Using this method allows you to avoid entering a long list of email recipients. You can then mail the reports to the alias and all the recipients will receive them.

1. While working with the profile, click **Options**.

2. In the left panel, under **Email**, click **Email Tasks**.

   The **Available email tasks** screen opens.

3. Select the appropriate email task.

4. Click **Recipients**.

   The **Recipients of reports for profile** screen opens.

5. Click **Add**.

   The **Email address** field appears.

6. Enter the email address of one person who should receive the reports and click **Add**.

7. Click **Continue**.

To test an email task

You can test an email task to ensure that the resulting email is what you want without sending it to everyone on the recipient list. You can specify a test email account to receive the reports for verification purposes. You can also use this feature to send the reports in an email task to a list of recipients that is different than the list specified in the email task.

☼ Unica NetInsight does not display errors it encounters while executing the email task when you are testing. If you need to troubleshoot an email task, execute it from the `nettracker.exe` command line using the `-emailtask` option. You can use the `-recipients` option to send the reports to a different list of recipients.

1. While working with the profile, click **Options**.

2. In the left panel, under **Email**, click **Email Tasks**.

   The **Available email tasks** screen opens.

3. Select the email task to test.

4. Click **Test**.

   The **Test email task** screen opens.

5. In the **Email address** field, enter the list of email addresses to which you want the reports in the email task sent.

   Separate multiple addresses with commas or semicolons. (Spaces before or after the commas are ignored.)

6. Click **Execute**.

To execute an email task

You must do the following before executing an email task:

• Create the email task

• Add reports to an email task

• Add recipients to an email task

When you execute an email task, Unica NetInsight includes all the reports in the email task in one email message and sends it to the specified recipients.

1. While working with the profile, click **Options**.

2. In the left panel, under **Email**, click **Email Tasks**.

   The **Available email tasks** screen opens.

3. Select the email task to execute.

4. Click **Execute**.

To edit an email task

1. While working with the profile, click **Options**.

2. In the left panel, under **Email**, click **Email Tasks**.

   The **Available email tasks** screen opens.

3. Select the appropriate email task.

4. Click **Edit**.

   The **Email task description** screen opens.

5. Edit values as desired and click **Save**.

You can now:

- Add reports to an email task

- Add recipients to an email task

To delete an email task

☼ When you delete an email task, all email alerts that use the email task are automatically deleted as well.

1. While working with the profile, click **Options**.

2. In the **Options** panel, select **Email > Email Tasks**.

   The **Available email tasks** screen opens.

3. Select the email task to delete.

4. Click **Delete**.

   The email task is deleted.

5. Click **Continue**.

To create an email alert

- ■ To create an email alert
- ■ To modify filters for an email alert
- ■ To test an email alert
- ■ To execute an email alert
- ■ To edit an email alert
- ■ To delete an email alert

To create an email alert

You must create at least one fully-configured email task before you can create an email alert.

1. While working with the profile containing the email task that should be executed, click **Options**.

2. In the left panel, under **Email**, click **Email Alerts**.

   The **Available email alerts** screen opens.

3. Click **Add**.

   The **Email alert description** screen opens.

4. In the **Name of alert** field, enter the name you want displayed for this alert in the **Available email alerts list**.

   Use a name that will clearly identify the alert.

5. In the **Email task** list, select the email task to be executed if the criteria you specify for the alert are met.

6. In the **Time period** list, select the time period for which the metric will be calculated.

   • To include data from a specified number of the specified time period units, starting with the current unit and counting back, select **Current**, enter the desired number of units in the first field, and select a time period unit from the drop-down list. For example, specifying **Current 2 days** includes data from today and yesterday.

   • To include data from a specified number of the specified time period units, starting with the previous unit and counting back, select **Previous**, enter the desired number of units in the first box, and select a time period unit from the drop-down list. For example, specifying **Previous 2 days** includes data from yesterday and the day before yesterday.

7. In the **Metric** list, select the metric for which you want to calculate a value.

8. In the **Execute if calculated value is** list, select the comparison type to use to compare the calculated value to the threshold value.

9. Enter a number for the threshold value in the next field to the right.

10. Click **Save Options**, then click **Continue**.

You can now add filters to the alert.

To modify filters for an email alert

1. While working with the profile, click **Options**.

2. In the left panel, under **Email**, click **Email Alerts**.

   The **Available email alerts** screen opens.

3. Select the email alert to modify filters for.

4. Click **Filters**.

   The **Filters that belong to email alert** screen opens.

5. To add a filter:

     a. Click **Add Filter**.

The **Available filters** screen opens.

     b. Select a filter and click **Continue**.

The **Filter description** screen opens.

     c. Select one or more bins for the filter and click **Continue**. For a string variable, fill in the Filter Description screen.

6. To edit a filter:

     a. Select the filter to edit.

     b. Click **Edit Filter**.

The **Available filters** screen opens.

     c. Edit the filter as desired and click **Continue**.

7. To delete a filter:

     a. Select the filter to delete.

     b. Click **Delete Filter**.

The filter is deleted.

8. Repeat steps 5 through 7 until the filter list is complete.

9. Click **Save Filters**.

To test an email alert

Before you execute an email alert, you should test it to troubleshoot the criteria you specified for the alert. When you test an email alert, a message displays the calculated value of the metric values that match the filters you specified, whether this calculated value meets the threshold value, and whether or not the alert would have been executed.

1. While working with the profile, click **Options**.

2. In the left panel, under **Email**, click **Email Alerts**.

    The **Available email alerts** screen opens.

3. Select the email alert to test.

4. Click **Test**.

The **Test email alert** screen opens, showing the results of the test.

To execute an email alert

You must do the following before executing an email alert:

• Create an email task containing one or more reports

• Create the email alert

- Optionally add filters to the email alert

1. While working with the profile, click **Options**.

2. In the left panel, under **Email**, click **Email Alerts**.

   The **Available email alerts** screen opens.

3. Select the email alert to execute.

4. Click **Execute**.

To edit an email alert

1. While working with the profiles, click **Options**.

2. In the left panel, under **Email**, click **Email Alerts**.

   The **Available email alerts** screen opens.

3. Select the email alert to edit.

4. Click **Edit**.

   The **Email alert description** screen opens.

5. Edit the fields on this screen as desired and click **Save**.

You now add filters to the alert.

To delete an email alert

1. While working with the profile, click **Options**.

2. In the **Options** panel, select **Email > Email Alerts**.

   The **Available email alerts** screen opens.

3. Select the email alert to delete.

4. Click **Delete**.

   The email alert is deleted.

5. Click **Continue**.

Archiving Reports

- About archiving reports
- To archive a report
- To remove archived reports

About archiving reports

Because you can generate a report at any time, there is generally no need to archive a separate copy of a report for record keeping. However, archived reports provide a static snapshot of data and use fewer database resources, so you may wish to archive reports to make better use of your resources or to preserve a view of data at a particular point in time.

You can view, export, and print archived reports.

Unica NetInsight always archives reports using Full mode, regardless of the reporting mode you are currently using in the profile.

☼ You cannot drill down into archived reports. An archived report has no links.

To archive a report

1. View the Profile that contains the report you want to archive.

2. Display the **Report Summary** page for the report you want to archive.

   You can open the **Report Summary** page by clicking the Report Designer icon

   ( ), or by selecting the report in the **Custom** tab and clicking **Edit Report**.

3. Click **Archive**.

4. In the **Report title** field, modify the name of the report as needed.

5. If you want the filters to be listed on the report, select the **Display filters on report** check box.

6. Click **Continue**.

The report is archived.

To remove archived reports

1. View the profile that contains the archived report you want to remove.

2. Click the **Options** tab.

3. In the **Unica NetInsight Options** drop-down list at the top of the screen, select **Remove Archived Reports**.

   The **Archived reports** screen opens, listing the archived reports

4. Do one of the following to remove the reports.

   • To remove only some of the archived reports, select them in the list and click **Remove Selected Reports**.

   • To remove all the reports, click **Remove All Reports**.

The selected reports are permanently removed from the archive.

3   Creating Reports

To save a customized report

If you want the saved report to keep the time period specified in the calendar, you must specify the time period using date filters created using the Custom Report Wizard or the Discovery Panel. The calendar setting is not preserved in saved reports.

When you customize a report, either by using the Custom Report Wizard or by modifying an existing report using the Report Designer, you can save your new or modified report from the **Report Summary** screen as follows:

1. Click **Save**.

2. Provide a name for your report in the **Report title** field.

    If you are editing an existing report from the **Custom** tab, you can overwrite the report with your changes. If you are editing a pre-existing report from the Report Designer, you must specify a new name to save your modified report.

3. If you have custom help written for this report, you can specify the URL of the web page to display in the **Help topic URL** field.

4. Enable **Save as new report**, unless you want to override a pre-generated report you edited using the **Custom** link.

    ☼   You should save all reports as new reports. If you overwrite pre-generated reports, your changes will be lost when the profile is updated.

5. Enable **Display filters on report** to display any applied filters at the top of the report.

6. Enable **Automatically update full report** to automatically update the report for Full reporting mode when the profile is updated.

7. Enable **Automatically update sample report** to automatically update the report for Sample reporting mode when the profile is updated.

8. Enable **Automatically archive report** to preserve a copy of the report each time the profile is updated, instead of having newer versions saved on top of older ones.

   This option is only available if the report has a relative date filter (**Yesterday**, **Today**, **Previous week**, etc.).

   ☼ You cannot drill down into archived reports. Archived reports have no links.

9. Choose a folder from the **Save report to** folder drop-down list.

10. Click **Continue**.

Your custom report has been saved. You may need to refresh your report list for the report to be visible in the list.

To save a customized report

If you want the saved report to keep the time period specified in the calendar, you must specify the time period using date filters created using the Custom Report Wizard or the Discovery Panel. The calendar setting is not preserved in saved reports.

When you customize a report, either by using the Custom Report Wizard or by modifying an existing report using the Report Designer, you can save your new or modified report from the **Report Summary** screen as follows:

1. Click **Save**.

2. Provide a name for your report in the **Report title** field.

   If you are editing an existing report from the **Custom** tab, you can overwrite the report with your changes. If you are editing a pre-existing report from the Report Designer, you must specify a new name to save your modified report.

3. If you have custom help written for this report, you can specify the URL of the web page to display in the **Help topic URL** field.

4. Enable **Save as new report**, unless you want to override a pre-generated report you edited using the **Custom** link.

   ☼ You should save all reports as new reports. If you overwrite pre-generated reports, your changes will be lost when the profile is updated.

5. Enable **Display filters on report** to display any applied filters at the top of the report.

6. Enable **Automatically update full report** to automatically update the report for Full reporting mode when the profile is updated.

7. Enable **Automatically update sample report** to automatically update the report for Sample reporting mode when the profile is updated.

8. Enable **Automatically archive report** to preserve a copy of the report each time the profile is updated, instead of having newer versions saved on top of older ones.

   This option is only available if the report has a relative date filter (**Yesterday**, **Today**, **Previous week**, etc.).

   ☼ You cannot drill down into archived reports. Archived reports have no links.

9. Choose a folder from the **Save report to** folder drop-down list.

10. Click **Continue**.

Your custom report has been saved. You may need to refresh your report list for the report to be visible in the list.

Creating a custom dashboard

- About dashboards
- To create a dashboard
- To create a graph dashboard section
- To create a text dashboard section
- To copy a dashboard section

About dashboards

Dashboards allow you to collect together relevant, key charts and textual data that can help you better monitor and understand your business on an ongoing basis. You can create an unlimited number of focused, subject-area reports displaying your key performance indicators (KPIs). You can create separate dashboards for different individuals or roles within your organization. You can filter dashboards to report only on the data that is relevant for the viewer.

You can create and manage dashboards, which are collections of charts and data from reports within your profile. profiles containing the dashboards can then be scheduled to update on a regular, periodic basis to consistently deliver up-to-date information. You can set up email tasks to automatically email dashboard reports to interested parties. You can also configure email alerts to send email to the appropriate people when a KPI exceeds some threshold.

About dashboard sections

Dashboards are composed of sections. A section can be one of two types: graph or text.

Graph sections contain a chart displaying a metric from one of the reports in the profile.

Text sections contain one or more data fields. A data field displays a dimension value or an aggregate metric. A single text section can contain data from multiple reports in the profile.

Data fields in text sections can be one of the following types:

- Average—Displays the average value for the specified metric for the specified time period.

- Total—Displays the sum of all values for the specified metric.

- Top—Displays the dimension value from the specified dimension with the highest value for the specified metric.

- Bottom—Displays the dimension value from the specified dimension with the lowest value for the specified metric.

To create a dashboard

You can create a dashboard within the profile you are viewing.

1. Click the **Custom** tab.

   The Managing Reports screen opens.

2. Click **Create Report**.

3. Select **Define a new report**, then **Dashboard**.

4. Click **Continue**.

5. If you want to create a report for a fixed time frame, click the Calendar icon and use the calendar to specify the time frame.

   You can specify a relative time frame using date filters later in the process.

6. Specify each section in the dashboard by doing one of the following:

   You can edit a section by selecting it and clicking **Edit**. You can delete a section by selecting it and clicking **Delete**.

   a. Create a graph dashboard section

   b. Create a text dashboard section

   c. Use a dashboard section from an existing dashboard

7. Arrange the sections the way you want them to appear in the dashboard, then click **Continue**.

   Select a section and use the up and down arrow keys to move it up and down in the current column, and use the left and right arrows to move the section from one column to another.

8. Enter a report title, then click **Continue**.

9. Specify any filters you want applied to the report, then click **Continue**.

If you want to create a report for a relative time frame, create a date filter that specifies the time frame.

The A/B Groups screen opens.

10. If you want to apply two sets of filters and compare the resulting reports, enter the two groups of filters, then click **Continue**.

By default, the two groups are named Group A and Group B. You can change the names.

The Report Summary page opens.

You can now **Run**, **Save**, **Email**, **Archive**, or **Export** this dashboard report.

To create a graph dashboard section

1. At the Designing the Dashboard screen, click **Add**.

The Adding a Section screen opens.

2. In the **Section title** field, enter the text you want to label this section in the dashboard.

If you leave this field blank, Unica NetInsight will use the name of the report entered in the **Data source** field as the section title.

3. In the **Section type** list, select **Graph**.

4. In the **Data source** list, select the report to serve as the source of the data for the dashboard section.

The default values of the other options on this screen may change, depending on the data source you select.

5. In the **Type of graph** list, select the type of graph that will be used to display the data in this section

6. In the **Graph data set** list, select the data set in the selected data source to provide the data for the dashboard section.

7. In the **Values in graph** list, select the number of values (1, 2, 3, 4, 5, 10, 15, 20, 25, 50, 75, or 100) that will appear in the graph for this dashboard section. An **All data** option is available for some data sources. You can also choose to use the default setting for the profile.

8. Clear the **Hide axis title** check box if you want the dashboard to display X,Y axis labels for this section. On pie charts, the **Graph data set** label will be displayed.

9. Click **Continue**.

To create a text dashboard section

1. At the Designing the Dashboard screen, click **Add**.

The Adding a Section screen opens.

2. In the **Section title** field, enter the text you want to label this section in the dashboard.

   If you leave this field blank, Unica NetInsight will use the name of the report entered in the **Section links** field as the section title.

3. In the **Section type** list, select **Text**.

   The remaining options on the page change.

4. In the **Section links** field, select the report to display when users click the section heading on the dashboard.

   Now you need to add the fields you want in the section.

5. Click **Add**.

   The Adding a Field screen appears.

6. In the **Field title** box, enter a title for the field.

   If you leave this field blank, Unica NetInsight uses the name of the report entered in the **Report link** field as the name of the field title.

7. In the **Field type** box, select a field type.

   The remaining options on the page may change depending on the field type you select.

8. Specify how to determine the value for the field using the options below that are appropriate for the field type:

   a. **Time period** (Average fields)—the time period to use to determine the average.

   b. **Metric** (Total, Average and Top fields)—the metric to supply the value for the field.

   c. **Dimension** (Top and Bottom fields)—the dimension to supply the value.

   d. **Order by** (Top and Bottom fields)—the metric to use to determine the top or bottom value for the specified dimension.

9. In the **Report link** box, select the report to display when users click the field's value in the dashboard.

10. Click **Continue** to add the field to the section.

11. Continue creating fields until you have created all the fields you want for this section.

    Fields appear in the dashboard section in the order they appear in the **Fields** list. You can use the **Move Up** and **Move Down** arrows to arrange the fields in the desired order.

    You can edit or delete a field by selecting it in the **Fields** list and clicking **Edit** or **Delete**.

12. When the **Fields** list is complete, click **Continue**.

To copy a dashboard section

When you specify a dashboard section for a dashboard, you can start by copying an existing dashboard section and editing it if necessary instead of creating a section. You can copy any saved dashboard section in the profile. You cannot copy sections from new, unsaved dashboards or sections added to existing dashboards since they were last saved.

Once you have added the copy of the section to the dashboard, you can edit the copy by selecting it at the Designing the Dashboard screen and clicking **Edit**.

1. At the Designing the Dashboard screen, click **Copy**.

   The Copy a Dashboard Section screen opens.

2. In the **Source dashboard** field, select the dashboard that contains the section you want to copy.

3. In the **Section to copy** list, select the dashboard section to copy.

4. Click **Continue**.

To display axis labels for dashboard reports

By default, Unica NetInsight does not display X,Y axis labels for reports displayed in a dashboard. You can enable axis labels for a dashboard report as described below.

☼ X,Y axis labels pertain to bar and line charts only. For pie charts, rather than an axis label, the Graph data set label is displayed.

1. With the desired dashboard displayed, click the Report Designer icon ( ).

   The Report Summary page opens.

2. In the Report description dialog, click the **Left column** or **Right column** link.

3. In the Dashboard sections dialog, select the desired report and click **Edit**.

4. In the Section description dialog, uncheck **Hide axis titles**.

5. Save the report.

Axis labels for the report are displayed the next time the profile is updated.

4 Configuring Reporting Options

- ■ About reporting options
- ■ Specifying auto-updated reports
- ■ Creating custom metrics
- ■ Creating filter groups
- ■ Specifying a sample size

About reporting options

The reporting options apply to all the reports in the profile. They enable you to create custom metrics for use on any report in the profile, create filter groups, specify the time period for which reports will be automatically generated during profile updates, and control which dimensions are reportable.

Specifying auto-updated reports

- ■ About auto-updating
- ■ To specify which reports auto-update

About auto-updating

Auto-updating reports are generated every time the profile is updated. In general, you want a report to update automatically if all of the following are true:

- • You are frequently importing data for the report's time frame into the profile.

- • You need to see the report on a regular basis.

- You would like the report to be available instantly.

Reports with relative time frames (for example, yesterday or current month) should generally be set to update automatically.

You can save time by not auto-updating the report if either of the following are true:

- The report is for a fixed time frame in the past for which all the data has been imported.

- You need to see the report infrequently and can run it ad-hoc.

All of the reports that appear in the Available Reports list on the Reports tab by default are set to update automatically. Reports you create only update automatically if you select one of the auto-update check boxes when you save the report.

You can manage which reports are auto-updated at the Auto-Updated Reports option screen. (This screen is only available at the profile options. You cannot access it from the default profile options.)

Privileges related to auto-updating

You can only access the Auto-Updated Reports screen if you have the Options: Reporting: Auto-Updated Reports privilege.

Reporting mode and auto-updating

If sampling is enabled for a profile, the Auto-Updated Reports option screen allows you to change the report lists for both **Full** mode and **Sample** mode, regardless of your reporting mode privileges. In general, updates are faster if there are fewer auto-updated reports in **Full** mode. You should consider auto-updating in **Full** mode only those reports you need to meet your reporting requirements and using **Sample** mode to auto-update reports identifying overall trends.

To specify which reports auto-update

1. View the profile whose reports you want to manage.

2. Click the **Options** tab.

3. From the Options panel select **Reporting** > **Auto-Updated Reports**.

   The Auto-Updated Reports option screen opens.

4. As desired, select and move reports between the two lists to specify which reports auto-update.

5. If sampling is enabled for the profile, the initial set of lists controls auto-updating for Full reporting mode. To specify auto-updating for reports running in Sampled mode, click **Edit Sample Reports**.

Creating custom metrics

- About custom metrics
- To create a custom filtered metric
- To create a multiple input custom metric
- To edit a custom filtered metric
- To edit a multiple input custom metric
- To delete a custom metric

About custom metrics

You can create metrics that will be available for use on any report in the profile. You can create two types of custom metrics:

- Metrics based on existing metrics, but with added filters

- Metrics that are derived from mathematically combining two existing metrics. Once you create a custom metric, it can be used to build other custom metrics, so it is possible to build more complex computations using multiple variables by nesting custom metrics.

To create a custom filtered metric

If you are adding filter groups to the custom filtered metric, you must define the filter group before performing this task.

1. While working with the profile, click **Options**.

2. In the left panel, under **Reporting**, click **Custom Metrics**.

   The **Custom metric definitions** screen opens.

3. Click **Add**.

   The **Custom metric type** screen opens.

4. In the **Select custom metric type** list, select **Filtered Metric**.

5. Click **Continue**.

   The **Custom metric definition** screen opens.

6. In the **Name** field, enter a name for the metric. The name is used internally.

   The name must be a single word, with only alphanumeric characters, and the first character must be a letter.

7. In the **Title** field, enter a title for the metric.

   The title appears in lists of metrics. It is also the basis for the title of the column containing the metric data.

8. In the **Description** field, enter a description for the metric.

The description is the explanation of the metric's column that appears in the page help for the report.

9. From the **Base metric** list, select the metric that provides the data to be filtered for the current metric.

10. Check the **Graphable** field to have the data from this metric to be available for graphing in the report graph.

11. Check the **Display percentage of total** field to have a percentage to display in the column as well as a number.

12. From the **Alignment** list, select how the values are aligned in the report column.

The options are Center, Left, and Right.

13. In the **Minimum twips** field, enter the minimum number of twips for the metric's column in reports.

A twip equals 1/1440 of an inch. This option affects only those reports that are exported in RTF format (usually for use in Microsoft Word).

14. In the **Recommended twips** field, enter the recommended number of twips for the metric's column in reports.

Unica NetInsight tries to make the column the recommended width.

15. Click **Continue**.

The **Filters for . .** screen opens.

16. Add one or more filters or filter groups to the custom metric.

a. Click **Add**.

The **Available filters** screen opens.

b. Select a dimension, or to add a defined filter group, select **Filter Group**.

c. Click **Continue**.

If you select a dimension, the **Filter description** screen opens.

If you select **Filter Group**, a list of defined filter groups open.

d. Complete the screen as required:

- If you selected a string dimension, select **that** or **that do not** from the first list.

  Then select a matching type from the second list.

  Then enter a string in the field, or select a value from the **Or select from this menu** list.

- If you selected a numeric dimension, select a value from the list.

- If you selected **Filter Group**, select the filter group to use.

Click **Add as Group** to add the complete filter group, so you are not able to remove individual filters from the custom metric. Or click **Add as Filters** to add all filters from the group individually, so you can delete filters from the custom metric.

e. Click **Continue**.

f. Repeat steps a through e until you have added all required filters.

g. Click **Continue**.

The custom metric is now available on the **Metrics** page of the **Custom Report Wizard**.

To make the custom metric available on the **Discovery Panel**, you must add it to a group in one or more metrics lists.

To create a multiple input custom metric

1. While working with the profile, click **Options**.

2. In the left panel, under **Reporting**, click **Custom Metrics**.

   The **Custom metric definitions** screen opens.

3. Click **Add**.

   The **Custom metric type** screen opens.

4. In the **Select custom metric type** list, select **Multiple Input Metric**.

5. Click **Continue**.

   The **Custom metric definition** screen opens.

6. In the **Name** field, enter a name for the metric. The name is used internally.

   The name must be a single word, with only alphanumeric characters, and the first character must be a letter.

7. In the **Title** field, enter a title for the metric.

   The title appears in lists of metrics. It is also the basis for the title of the column containing the metric data.

8. In the **Description** field, enter a description for the metric.

   The description is the explanation of the metric's column that appears in the page help for the report.

9. From the **Metric 1** list, select the first metric to combine.

   ☼ If you are dividing metric values, **Metric 1** is the number that is divided.

10. From the **Metric 2** list, select the second metric to combine.

   ☼ If you are dividing metric values, **Metric 2** is the number that is divided by

11. From the **Operation** list, select the operation you want to use to combine the two metrics.

12. If you selected a floating point operation, select the number of decimal places to use from the **Precision** list.

13. Check the **Graphable** field to have the data from this metric to be available for graphing in the report graph.

14. Check the **Display percentage of total** field to have a percentage to display in the column as well as a number.

15. From the **Alignment** list, select how the values are aligned in the report column.

The options are **Center**, **Left**, and **Right**.

16. In the **Minimum twips** field, enter the minimum number of twips for the metric's column in reports.

A twip equals 1/1440 of an inch. This option only affects reports that are exported in RTF format (usually for use in Microsoft Word).

17. In the **Recommended twips** field, enter the recommended number of twips for the metric's column in reports.

Unica NetInsight tries to make the column the recommended width.

18. Click **Continue**.

The custom metric is now available on the **Metrics** page of the **Custom Report Wizard**.

To make the custom metric available on the **Discovery Panel**, you must add it to a group in one or more metrics lists.

To edit a custom filtered metric

If you are adding filter groups to the custom filtered metric, you must define the filter group before performing this task.

1. While working with the profile, click **Options**.

2. In the left panel, under **Reporting**, click **Custom Metrics**.

The **Custom metric definitions** screen opens.

3. Select the custom filtered metric to edit.

4. Click **Edit**.

The **Custom metric type** screen opens.

5. In the **Title** field, edit a title for the metric.

The title appears in lists of metrics. It is also the basis for the title of the column containing the metric data.

6. In the **Description** field, edit a description for the metric.

The description is the explanation of the metric's column that appears in the page help for the report.

7. From the **Base metric** list, select the metric that provides the data to be filtered for the current metric.

8. Check the **Graphable** field to have the data from this metric to be available for graphing in the report graph.

9. Check the **Display percentage of total** field to have a percentage to display in the column as well as a number.

10. From the **Alignment** list, select how the values are aligned in the report column.

The options are Center, Left, and Right.

11. In the **Minimum twips** field, enter the minimum number of twips for the metric's column in reports.

A twip equals 1/1440 of an inch. This option affects only reports that are exported in RTF format (usually for use in Microsoft Word).

12. In the **Recommended twips** field, enter the recommended number of twips for the metric's column in reports.

Unica NetInsight tries to make the column the recommended width.

13. Click **Continue**.

The **Filters for . .** screen opens.

14. Add one or more filters or filter groups to the custom metric as necessary.

a. Click **Add**.

The **Available filters** screen opens.

b. Select a dimension, or to add a defined filter group, select **Filter Group**.

c. Click **Continue**.

If you select a dimension, the **Filter description** screen opens.

If you select **Filter Group**, a list of defined filter groups open.

d. Complete the screen as required:

• If you selected a string dimension, select **that** or **that do not** from the first list.

Then select a matching type from the second list.

Then enter a string in the field, or select a value from the **Or select from this menu** list.

• If you selected a numeric dimension, select a value from the list.

• If you selected **Filter Group**, select the filter group to use.

Click **Add as Group** to add the complete filter group, so you are not able to remove individual filters from the custom metric. Or click **Add as Filters** to add all filters from the group individually, so you can delete filters from the custom metric.

e. Click **Continue**.

f. Repeat steps a through e until you have added all required filters.

g. Click **Continue**.

15. Edit filters or filter groups as necessary.

a. Select the filter or filter group to edit.

b. Click **Edit**.

If you select a dimension, the **Filter description** screen opens.

If you select **Filter Group**, a list of defined filter groups open.

c. Complete the screen as required:

- If you selected a string dimension, select **that** or **that do not** from the first list.

  Then select a matching type from the second list.

  Then enter a string in the field, or select a value from the **Or select from this menu** list.

- If you selected a numeric dimension, select a value from the list.

- If you selected **Filter Group**, select the filter group to use.

  Click **Add as Group** to add the complete filter group, so you are not able to remove individual filters from the custom metric. Or click **Add as Filters** to add all filters from the group individually, so you can delete filters from the custom metric.

d. Click **Continue**.

e. Repeat steps a through e until you have edited all required filters.

f. Click **Continue**.

16. Delete filters or filter groups as necessary.

a. Select the filter or filter group to delete.

b. Click **Delete**.

17. Click **Continue**.

The updated custom metric is now available on the **Metrics** page of the **Custom Report Wizard**.

To make the custom metric available on the **Discovery Panel**, you must add it to a group in one or more metrics lists.

To edit a multiple input custom metric

1. While working with the profile, click **Options**.

2. In the left panel, under **Reporting**, click **Custom Metrics**.

   The **Custom metric definitions** screen opens.

3. Select the multiple input custom metric to edit.

4. Click **Edit**.

   The **Custom metric definition** screen opens.

5. In the **Title** field, edit a title for the metric.

   The title appears in lists of metrics. It is also the basis for the title of the column containing the metric data.

6. In the **Description** field, edit the description for the metric.

   The description is the explanation of the metric's column that appears in the page help for the report.

7. From the **Metric 1** list, select the first metric to combine.

   ☼ If you are dividing metric values, **Metric 1** is the number that is divided.

8. From the **Metric 2** list, select the second metric to combine.

   ☼ If you are dividing metric values, **Metric 2** is the number that is divided by

9. From the **Operation** list, select the operation you want to use to combine the two metrics.

10. If you selected a floating point operation, select the number of decimal places to use from the **Precision** list.

11. Check the **Graphable** field to have the data from this metric to be available for graphing in the report graph.

12. Check the **Display percentage of total** field to have a percentage to display in the column as well as a number.

13. From the **Alignment** list, select how the values are aligned in the report column.

    The options are **Center**, **Left**, and **Right**.

14. In the **Minimum twips** field, enter the minimum number of twips for the metric's column in reports.

    A twip equals 1/1440 of an inch. This option only affects reports that are exported in RTF format (usually for use in Microsoft Word).

15. In the **Recommended twips** field, enter the recommended number of twips for the metric's column in reports.

    Unica NetInsight tries to make the column the recommended width.

16. Click **Continue**.

The custom metric is now available on the **Metrics** page of the **Custom Report Wizard**.

To make the custom metric available on the **Discovery Panel**, you must add it to a group in one or more metrics lists.

To delete a custom metric

1. While working with the profile, click **Options**.

2. In the left panel, under **Reporting**, click **Custom Metrics**.

   The **Custom metric definitions** screen opens.

3. Select the custom metric to delete.

4. Click **Delete**.

   The **Custom metric definition** screen opens.

5. Click **Continue**.

The custom metric is no longer available.

Creating filter groups

- About filter groups
- To create a filter group
- To edit a filter group
- To edit filters for a filter group
- To delete a filter group

About filter groups

When users create multiple reports, they may often need to apply the same filters repeatedly. Filter groups enable you to specify a set of filters (including custom filters) once and then apply it to many reports. When a user applies a filter group containing multiple filters, the user can choose to apply the filter as a single group or as the individual filters within the group. If the filters are applied as a group, the filters can only be removed as a single unit. If the filters are added as individual filters, the user can independently select and remove specific filters, while keeping others.

To create a filter group

1. While working with the profile, click **Options**.

2. In the left panel, under **Reporting**, click **Filter Groups**.

The **Filter group definitions** screen opens.

3. Click **Add**.

   The **Filter group description** screen opens.

4. In the **Name of filter group** field, enter a one-word name.

   The name is used internally. You can use only alphanumeric characters. Once the filter group is created, you cannot change the name.

5. In the **Title of filter group** field, enter a title.

   The title appears in the list of filters.

6. Click **Save Options**, then click **Continue**.

   The **Filters that belong to** screen opens.

7. Add one or more filters or other filter groups to the filter group.

   a. Click **Add Filter**.

   The **Available filters** screen opens.

   b. Select a dimension, or to add a defined filter group, select **Filter Group**.

   c. Click **Continue**.

   If you select a dimension, the **Filter description** screen opens.

   If you select **Filter Group**, a list of defined filter groups open.

   d. Complete the screen as required:

   - If you selected a string dimension, select **that** or **that do not** from the first list.

     Then select a matching type from the second list.

     Then enter a string in the field, or select a value from the **Or select from this menu** list.

   - If you selected a numeric dimension, select a value from the list.

   - If you selected **Filter Group**, select the filter group to use.

     Click **Add as Group** to add the complete filter group, so you are not able to remove individual filters from the custom metric. Or click **Add as Filters** to add all filters from the group individually, so you can delete filters from the custom metric.

   e. Click **Continue**.

   f. Repeat steps a through e until you have added all required filters.

   g. Click **Save Filters**.

8. Click **Continue**.

You must now apply the filter group to a report.

To edit a filter group

These instructions describe how to change the filter group's title. You can also edit the filters included with the filter group.

1. While working with the profile, click **Options**.

2. In the left panel, under **Reporting**, click **Filter Groups**.

   The **Filter group definitions** screen opens.

3. Select the filter group to edit.

4. Click **Edit**.

   The **Filter group description** screen opens.

5. In the **Title of filter group** field, enter a title.

   The title appears in the list of filters.

6. Click **Save Options**, then click **Continue**.

To edit filters for a filter group

1. While working with the profile, click **Options**.

2. In the left panel, under **Reporting**, click **Filter Groups**.

   The **Filter group definitions** screen opens.

3. Select the filter group for which you want to edit filters.

4. Click **Filters**.

   The **Filters that belong to** screen opens.

5. Add one or more filters or defined filter groups to the filter group as necessary.

   a. Click **Add Filter**.

   The **Available filters** screen opens.

   b. Select a dimension, or to add a defined filter group, select **Filter Group**.

   c. Click **Continue**.

   If you select a dimension, the **Filter description** screen opens.

   If you select **Filter Group**, a list of defined filter groups opens.

   d. Complete the screen as required:

   - If you selected a string dimension, select **that** or **that do not** from the first list.

     Then select a matching type from the second list.

     Then enter a string in the field, or select a value from the **Or select from this menu** list.

- If you selected a numeric dimension, select a value from the list.

- If you selected **Filter Group**, select the filter group to use.

  Click **Add as Group** to add the complete filter group, so you are not able to remove individual filters from the custom metric. Or click **Add as Filters** to add all filters from the group individually, so you can delete filters from the custom metric.

  e. Click **Continue**.

  f. Repeat steps a through e until you have added all required filters.

  g. Click **Continue**.

6. Edit filters or filter groups as necessary.

  a. Select the filter or filter group to edit.

  b. Click **Edit Filter**.

  If you select a dimension, the **Filter description** screen opens.

  If you select **Filter Group**, a list of defined filter groups opens.

  c. Complete the screen as required:

    - If you selected a string dimension, select **that** or **that do not** from the first list.

      Then select a matching type from the second list.

      Then enter a string in the field, or select a value from the **Or select from this menu** list.

    - If you selected a numeric dimension, select a value from the list.

    - If you selected **Filter Group**, select the filter group to use.

      Click **Add as Group** to add the complete filter group, so you are not able to remove individual filters from the custom metric. Or click **Add as Filters** to add all filters from the group individually, so you can delete filters from the custom metric.

  d. Click **Continue**.

  e. Repeat steps a through e until you have edited all required filters.

  f. Click **Continue**.

7. Delete filters or filter groups as necessary.

  a. Select the filter or filter group to delete.

  b. Click **Delete Filter**.

8. Click **Back to Filter Groups**.

To delete a filter group

Deleting a filter group impacts all reports and custom metrics to which you added the filter group as a group, as well as any saved reports that use the report or custom metric.

1. While working with the profile, click **Options**.

2. In the **Options** panel, select **Reporting > Filter Groups**.

   The **Filter group definitions** screen opens.

3. Select the filter group to delete.

4. Click **Delete**.

   The **Filter group description** screen opens.

5. Click **Continue**.

Specifying a sample size

- About data samples
- To specify the sample size
- Permissions for sampling features

About data samples

You can allow users to work with reports that display projections based on a random sample of the profile data. Working with a profile's full data set may be more time-consuming than is practical for ad-hoc analysis. Some tasks, such as exploring data or creating reports, can be accomplished more quickly using a subset of the data with the calculations extrapolated to the full data set. You can enable the sample reporting mode by specifying a non-zero sample size in the profile options. The sample size is defined as a percentage of visitors.

When a profile with a non-zero sample size specified is updated, Unica NetInsight does the following:

- Takes a random sample of the specified size of all new visitors in the data imported during this update and stores all data associated with these visitors in sample tables in the profile's database. For example, if the sample size were 5% and there were 100 new visitors imported during the update, Unica NetInsight would randomly select 5 of the new visitors and store their data in the sample tables.

- Looks for any new visits by visitors already in the sample and adds information about those visits to the sample tables.

Spider and robot visitors also are sampled at the specified percentage.

After you specify a profile's visitor sample percentage for the first time, update the profile to make sample reports available. If you are changing an existing non-zero sample percentage, run the `-resample` command-line option followed by the `-recalc -sampleonly` command-line option to update the sample tables and reports.

About the sample size

The sample size is defined as a percentage of visitors in the full data set. You may enter a numeric value between 0 and 100 with precision up to three decimal places to the right of the decimal point. If you know you want the sample of visitors to include a specific count of a certain database entity (such as visits, events, or views), you can use the `-samplecalc` command-line option to estimate the percentage of visitors to use to return a sample with the desired entity count.

Changing the sample size

Each time you change the visitor sample percentage option, you should clear the sample tables and resample the profile data. You can do this without disturbing your non-sample tables by running the `-resample` command-line option followed by the `-recalc -sampleonly` option. If you do not run `-resample`, when you update the profile, new data is sampled at the new percentage. This results in a sample set that contains the previous percentage of old data and the new percentage of new data. You can fix this by running `-resample` followed by `-recalc -sampleonly`.

Changing the sample data

You can also change the data in the sample while leaving the sample size the same. Unica NetInsight uses a random number generator to select new visitors for the sample. The random number generator algorithm is determined by a seed value. A given seed selects the same set of visitors every time from a fixed set of data. If you would like to see a different sample, run the `-reseed` command-line option to change the seed and then run the `-resample` command-line option to clear and repopulate the sample tables followed by the `-recalc -sampleonly` option to generate the reports.

To specify the sample size

1. View the profile.

2. Click the **Options** tab.

3. Under **Reporting**, click **Sampling**.

   The Sampling options screen appears.

4. In the **Visitor sample percentage** field, enter the percentage of visitors in the full data set you want in the sample.

   You can specify up to three decimal places to the right of the decimal point. Use a value of zero to disable sampling (not generate any sample tables or reports).

5. Click **Save Options**.

If this is the first time a sample size has been entered for the profile, you must update the profile before users can select a reporting mode. If you have changed an existing sample value, you must run the `-resample` command-line option followed by the `-recalc -sampleonly` option to use the new sample size. Any previous sample data is used until the profile is resampled.

Permissions for sampling features

You can prevent users from changing the sample size through the interface. You can also remove the **Reporting Mode** option to prevent users from changing the reporting mode and limit them to their default mode for each profile. You can also prevent users from saving reports to be automatically generated in **Full** mode or **Sample** mode.

The following new privileges have been added to control access to sampling:

Privilege	Option
Options: Reporting: Sampling	**Visitor sample percentage** option
Interface: Icon: Reporting Mode	**Reporting Mode** option on Reports and Custom tabs
Interface: Sampling: Email/Export Change Level	**Reporting mode** option on Email and Export options screens
Interface: Custom Report Wizard: Auto Update Sample Report	**Automatically update sample report** option
Interface: Custom Report Wizard: Auto Update Full Report	**Automatically update full report** option

5 Analyzing events

About events

An event is any action on your Web site other than loading a page. Events include, but are not limited to, the following:

- Changing a field on a form

- Selecting an option in a drop-down list box

- Submitting a form

Events are plentiful in Rich Internet Applications (RIAs) such as Flash or AJAX presentations.

Configuring Unica NetInsight to track events

Before you can analyze events in Unica NetInsight, you must first tag the events on your site using Unica page tags and configure the Unica NetInsight profile to analyze page tags. See the *Unica Page Tags User's Guide* for details on tagging pages.

Any page tag request that contains the optional name-value pair ev=*value* will be considered an event by Unica NetInsight and will appear in the Event Summary.

To define an event title

By default, an event will be listed in a report using the value for the ev field that appears in the page tag request. Statistics for all events with the same value will appear in the same row of the report. You can specify a more user-friendly title for an event that will display in the reports instead of the request value.

1. View the profile in which you want to analyze events.

2. Click the **Options** tab.

3. In the **Options** panel, select **Dynamic Content > Events**.

4. Click **Add**.

5. In the **Value of event field** box, enter the value used for the ev field in the page tag requests for this event.

6. In the **Title of event** box, enter the text you want to appear in the report instead of the event field value.

7. Check the **Create filtered metric** check box if you want Unica NetInsight to create a filtered metric based on this event.

8. Click **Save Options** and then click **Continue**.

Unica NetInsight will begin using the new event titles the next time reports are generated.

To edit an event title

1. View the profile that contains the event title you want to edit.

2. Click the **Options** tab.

3. In the **Options** panel, select **Dynamic Content > Events**.

4. Select the event title and click **Edit**.

To delete an event title

When you delete the event title for an event, Unica NetInsight will use the event field value in reports.

Filtered metrics based on events cannot be deleted from the Events option pages. You must delete the custom metrics from the Custom Metrics option pages.

1. View the profile that contains the event whose title you want to delete.

2. Click the **Options** tab.

3. In the **Options** panel, select **Dynamic Content > Events**.

4. Select the event title you want to delete and click **Delete**.

6 Analyzing content groups

- About analyzing content groups
- About determining the content group for files that fit multiple groups
- To create a content group

About analyzing content groups

Unica NetInsight lets you track the popularity of different types of content on your Web site. For example, you could track how many visitors are viewing information on particular products.

To track different types of content, you need to divide the files that contain the content for your Web site into content groups. The content group statistics appear on the Content Summary.

About determining the content group for files that fit multiple groups

A file can only belong to one content group. If you have a file that meets the criteria for more than one group, Unica NetInsight will include the file in the first content group to which it can belong. You can use the **Move Up** and **Move Down** buttons to change the order of the content groups in the **Content groups to be analyzed** list.

To create a content group

1. View the profile in which you want to create the content group.

---

2. Click the **Options** tab.

3. In the **Options** panel, select **Content > Content Groups**.

4. Click **Add**.

5. Enter a name for the content group, click **Save Options** and then click **Continue**.

6. Select the content group and click **Pages**.

7. Click **Add**.

8. Enter a filter that describes the files you want to include in this content group.

9. Click **Add**.

    Your content group statistics will be tracked for all new data you import from now on.

10. If this is what you want or if you have additional filters or content groups to enter at this time, click **Continue**.

    If you want to analyze this content group in data you have already imported, you will need to delete all the data in your profile and reimport your log files.

    ☼ If you do not still have all the log files you have imported into this profile, you will lose data permanently by choosing this option.

    To delete your profile data, click **Delete Profile Data**.

11. To add another filter to this content group, click **Add**. To return to the list of content groups, click **Back to Content Groups**.

7 Analyzing Marketing Efforts

- About analyzing marketing efforts
- Analyzing campaigns
- Analyzing visit cost

About analyzing marketing efforts

Unica NetInsight allows you to track the effectiveness of the marketing efforts that relate to your Web site. Using Unica NetInsight you can:

- Analyze the performance of various campaigns

- Analyze visit cost and paid search ROI

- See which sites are referring the most visitors to your site

- Track which search engines and directories are indexing your site

Analyzing campaigns

- About campaigns
- About dynamic and static campaigns
- About campaign channels
- About campaign segments
- About entry pages for campaign segments
- To create a campaign in NetInsight
- To specify campaign channels
- To specify campaign segments

■ To specify entry pages

■ About paid search data

About campaigns

A campaign is messaging created by a marketing department to drive traffic to your Web site. A campaign is typically run through multiple channels (banner ads, email, Internet search, print ads, etc.) and a channel may contain multiple segments (the ad variation within a channel). Optionally, a campaign can include specific entry pages on your Web site that associate a visit with that campaign. In Unica NetInsight, campaign statistics are listed in the Campaign Summary report.

The following diagram shows the relationships between campaigns, channels, segments, and paid keywords in two sample static campaigns.
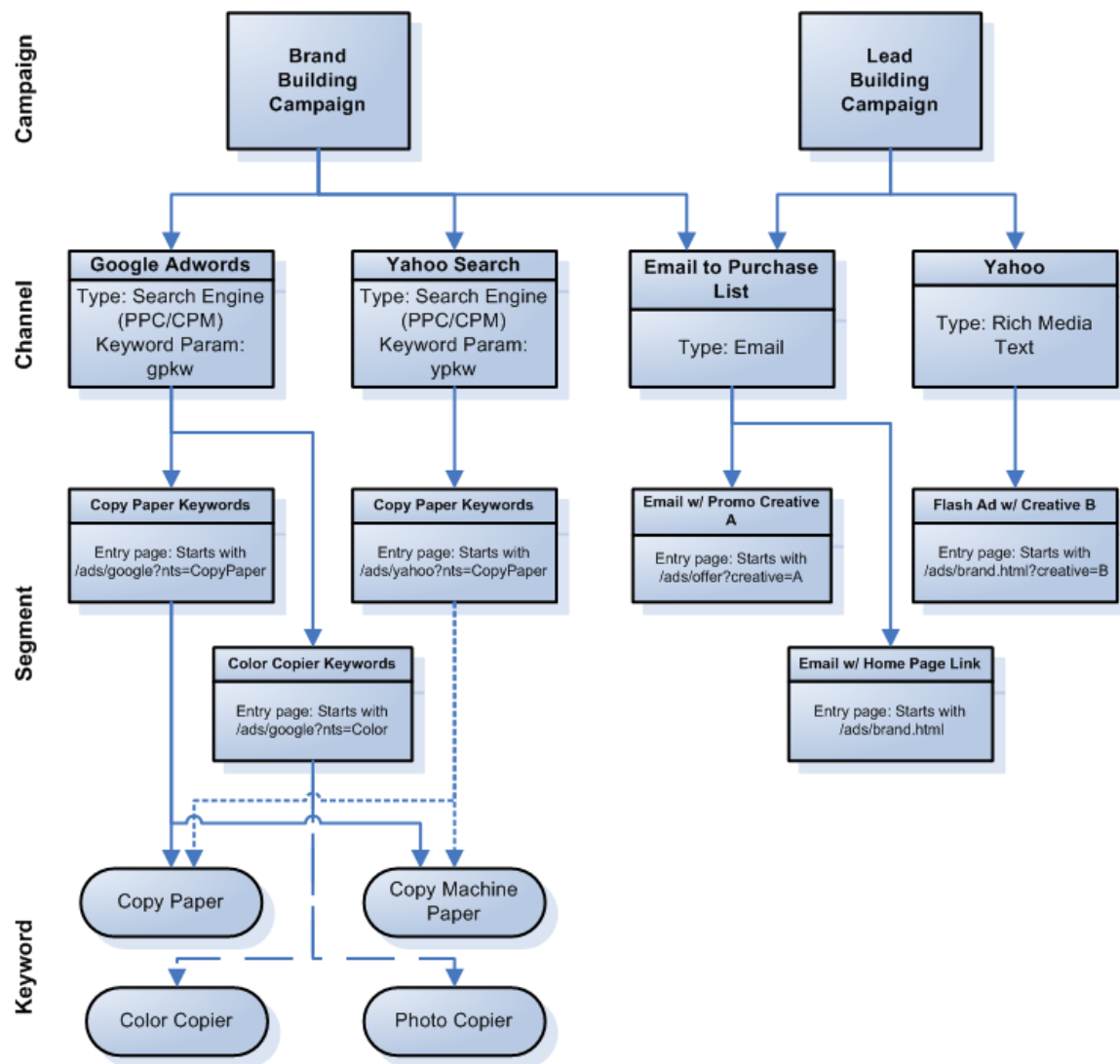
About dynamic and static campaigns

Campaigns can be defined in Unica NetInsight as either dynamic or static.

- Dynamic campaigns attribute visits based on parameter values passed in a query string.

- Static campaigns attribute visits based on entry page definitions in the campaign's channel segments.

About dynamic campaigns

Dynamic campaigns allow you to define a campaign matching pattern only once in Unica NetInsight, instead of having to define each campaign manually. This is especially useful with online channels whose channel and segment definitions may alter regularly over time.

You create dynamic campaigns by specifying a campaign parameter identifier in Unica NetInsight. This identifier is used to match a campaign parameter identifier in the URLs visitors use to access your site. At data import, Unica NetInsight parses the parameter strings in your site logs. When a match is made between a query string parameter ID and one defined in Unica NetInsight, Unica NetInsight examines the value of the parameter. It then attributes that visit to an existing campaign (if a value match is found) or automatically creates and assigns that visit to a new campaign (if a value match is not found). The name of each campaign in Unica NetInsight is the value of the parameter.

The channels and segments belonging to a campaign can also be defined as dynamic, thus you can use a single campaign, channel, and segment matching pattern to process all visit attributions to your campaigns. While dynamic campaigns can use parameter values alone to attribute visits, you can include entry page definitions as well if you want target specific pages only in a campaign.

For example, suppose you define a dynamic campaign whose parameter identifier is *camp*. Under that you define a dynamic channel whose parameter identifier is *chan*. And under that you define a dynamic segment whose parameter identifier is *seg*. Three unique visitors enter your site at these URLs:

- `http://www.mysite.com?&camp=Clearance&chan=Email&seg=SpecialOffer`

- `http://www.mysite.com?&camp=Clearance&chan=Twitter&seg=SpecialOffer`

- `http://www.mysite.com?&camp=SpringSale&chan=Email&seg=SaleAlert`

The first two visits will both be attributed to the *Clearance* campaign, different channels, but to the same *SpecialOffer* segment. The third visit will be attributed to the *SpringSale* campaign, *Email* channel, and *SaleAlert* segment. If any of these campaigns, channels, or segments do not already exist in Unica NetInsight they will be created automatically.

In Unica NetInsight reports, in addition to comparing the traffic generated by the two campaigns, you can also compare traffic generated across campaigns by different channels (*Email* versus *Twitter*) and segments (*SpecialOffer* versus *SaleAlert*).

About Static campaigns

Static campaigns attribute visits based on entry page definitions in the campaign's channel segments. While less flexible than dynamic campaigns, static campaigns are useful if you are not parameterizing URLs, or if you deploy only a few campaigns whose channels and segments alter little or not at all over time. Static campaigns could be a good choice for print media, since you know the URL well in advance of the traffic coming to your site.

For example, suppose you were running several magazine ads to launch a new product. The campaign segment for the first ad might look like this:

```
Campaign Name: Extreme Widget
Channel Name:  Print Media
Segment Name:  Ad1
Entry Page: www.site.com/ExtremeWidgetAd1
```

Every visit whose entry page is `www.site.com/NewProductAd1` will be associated with the Ad1 segment of the Extreme Widget campaign.

Which to use, dynamic or static?

For most situations dynamic campaigns are superior to static. They are easier to set up, more adaptive to change, and much easier to maintain. In static campaigns, each time new channels segments are added to your marketing campaign they must be manually added to Unica NetInsight. Dynamic campaigns automate this process and require editing only if parameter identifiers themselves change.

A simple deployment model would be to create a single dynamic campaign with dynamic channels and segments. If you want the ability to compare campaign-driven visits to organics visits, below the dynamic camapign you could create a single static campaign with static channels and segments and no entry pages. This static campaign would catch any and all visits not matched and attributed by the dynamic campaign.

Note that as it suits your needs you can also use a hybrid of static and dynamic behavior at different levels in a campaign definition. For example, you could create a static campaign whose channels and segments are dynamic.

Ordering campaigns for desired attribution

A visit can be attributed to only one campaign. If a visit meets the criteria for multiple campaigns, Unica NetInsight attributes it to the first campaign whose criteria it meets. The order of attribution is determined by the order in which campaigns are listed on the **Campaign Options** screen.

It is important to consider the order in which you want visits attributed and then order your campaigns accordingly. As a rule of thumb, you should position campaigns with the most-specific matching criteria at the top. A static campaign with static channels and segments and no entry page definition will match all visits. If such a campaign were positioned at the top of the list no other campaigns would receive attribution. Use the up and down buttons to the right of the list to change the order of the campaigns.

☼ These ordering considerations and guidelines apply to channels and segments as well.

Allowing default substitutions for dynamic channels and segments

When you create dynamic channels and segments, you can specify whether to allow a default value to be used if the parameter identifier specified in Unica NetInsight is not found in the parameter string, or if a parameter value is an empty string.

- If you allow the default to be used, "None" will be substituted for missing parameter identifiers and/or values.

- If you do not allow the default to be used, Unica NetInsight will search other channels and campaigns and attempt to make a parameter identifier match. If a match is made, attribution for that visit is assigned accordingly. If a match cannot be made, no visit attribution is assigned. If the parameter value is missing, no attribution is made.

About campaign channels

A campaign channel is the content source (such as a Web site, print publication, or newsletter) through which you are running a campaign that sends visitors to your Web site. Campaign channel statistics appear on the Campaign Channel Summary.

If campaign channels in separate campaigns share a name, you can analyze the combined traffic for the channels in the Campaign Channel Summary. In the Campaign Channel Summary unfiltered by a campaign, there is one row per unique channel name that shows the combined traffic for all channels with that name. In the Campaign Channel Summary filtered by a campaign, the row with the shared channel name shows only traffic for the channel in the specified campaign.

You must specify one of the following types for each campaign channel:

- Affiliate — Web site that sells the products of other Web sites, called "affiliates."

- Banner ad — Advertisement in the form of a graphic image on a Web page or located in a space reserved for ads, linking to an advertiser's Web site.

- Direct mail — Marketing communications delivered directly to a prospective purchaser via a postal service or private delivery company.

- Email — Email message that contains information or advertising.

- Instant messaging — Service that alerts users when friends or colleagues are online, and enables them to communicate in real time through private online chat areas.

- Newsletter — Printed or online report that provides news or information of interest to a special group.

- Paid listing — Guarantee of a ranking in a search listing for the terms of your choice; can be placed on a site other than a search engine.

- Print media — Medium that distributes printed matter, such as a newspaper, magazine, or book.

- Rich media ad — Advertisement that usually includes richer graphics than a banner ad and includes audio or video within the advertisement.

- Search engine (PPC/CPM) — Pay-per-click or cost per thousand views advertising (or both) on a search engine.

- (Other) — A channel type not listed above.

Campaign channel type statistics appear on the Campaign Channel Type Summary.

For search engine (PPC/CPM) channels, you can analyze the performance of the various paid keywords. Paid keyword statistics appear on the Paid Keyword Summary.

About campaign segments

A campaign segment is the ad variation or group within each campaign channel. Campaign segment statistics appear on the Campaign Segment Summary. Like campaigns and channels, segments can be dynamic or static.

Optionally, segments can have one or more associated entry pages. Entry pages can be defined using the page's file name or by a query string filter. Visitors who access a site via a segment's defined entry pages will be attributed to that segment, and their visit will ultimately be attributed to the segment's campaign. While Unica NetInsight does not require you to define entry pages, whether you should or not depends on the type of campaign you are creating and whether you want only select entry pages attributed to your campaigns.

- Dynamic campaigns (with dynamic channels and segments) can attribute visits to campaigns based on parameter strings alone. Define entry pages only if you want specific points of entry attributed to your dynamic campaign.

- Static campaigns (with static channels and segments) can only attribute visits based on entry page. So, while not required by Unica NetInsight, practically speaking, static campaigns require entry page definitions if they are to accurately attribute visits to different campaigns. A static campaign with no entry pages defined will match every visit to your site.

If campaign segments in separate channels share a name, you can analyze the combined traffic for the segments in the Campaign Segment Summary. In the Campaign Segment Summary unfiltered by a channel, there is one row per unique segment name that shows the combined traffic for all segments with that name. In the Campaign Segment Summary filtered by a channel, the row with the shared segment name shows only traffic for the segment in the specified channel.

About entry pages for campaign segments

For any campaign segment you can specify the URL of an entry page to your Web site. Visitors arriving on this page will be attributed to this segment.

URLs for entry pages must be unique for each segment. You can achieve unique URLs in the following ways:

- Create a separate entry page for each campaign segment.

- Use query string parameters to create multiple unique URLs for the same entry page.

Do not use your home page as the entry page unless you are using query strings to define the entry page. If you are not using query strings and you use your home page as the entry page for the campaign, all traffic to your home page appears in the campaign analysis. To figure out what percentage of the traffic to your home page resulted from your campaign, you must drill repeatedly into the Campaign Summary.

Query strings can contain other parameters besides the ones used to identify the campaign segment. These parameters can be analyzed in Unica NetInsight as well.

About entry page matching rules

Unica NetInsight applies entry page matching rules defined for a campaign segment as follows:

- If a question mark **is not** present in the value specified for the entry page rule, the entire value that is specified is compared to the entry page according to the rule definition.

- If a question mark **is** present in the value specified for the entry page rule, the part of the rule to the left of the question mark (the page portion) is compared to the entry page according to the rule definition. If the page part of the rule matches, the part to the right of the question mark (the query string portion) is compared to the query string associated with the entry page as follows:

  - If the first character of the query string part of the rule is a percent sign, it will be considered to be a regular expression and will be compared to the query string part of the entry page using a **that match the regular expression** filter.

  - If the first character of the query string part of the rule is not a percent sign and the query string part of the rule contains one or more equal signs, it will be considered to be a collection of name/value pairs that Unica NetInsight should search for in the query string associated with the entry page. The query string part of the entry page will be considered a match if each name/value pair present in the rule definition is also present in the query string. The order and case of the name/value pairs entered in the rule definition is not significant.

  - If the first character of the query string part of the rule is not a percent sign and the query string part of the rule does not contain an equal sign, it will be compared to the query string part of the entry page using a **that match** filter.

Following are some examples of entry page rules and the pages that will and will not match the rule.

Example 1

If the entry pages of a campaign segment are defined by the filter **that contain ad?%referrer=google.***, visitors entering the Web site through the following pages would be attributed to the given campaign, channel, and segment:/ad.cgi?referrer=google /ad.cgi?thereferrer=google /ad.cgi?keywords=red&referrer=google /scripts/ad.cgi?referrer=google&keywords=red /googlead.cgi?referrer=google-groups&keywords=red

Visitors entering through these entry pages would not be attributed to the given campaign, channel, and segment:/ad.cgi?referrer=yahoo /referral.cgi?referrer=google

Example 2

If the entry pages of a campaign are defined by the filter **that match /ad.cgi?referrer=google**, visitors entering the Web site through the following pages would be attributed to the given campaign, channel, and segment:/ad.cgi?referrer=google /ad.cgi?referrer=google&keywords=red /ad.cgi?keywords=red&referrer=google

Visitors entering through these pages would not be attributed to the given campaign, channel, and segment:/ad.cgi?referrer=google-groups /ad.cgi?thereferrer=google

Example 3

If the entry pages of a campaign are defined by the filter **that end with ad.cgi?google**, visitors entering the Web site through the following page would be attributed to the given campaign, channel, and segment:/ad.cgi?google

Visitors entering through these pages would not be attributed to the given campaign, channel, and segment:/ad.cgi?google-groups /scripts/ad.cgi?referrer=google

To create a campaign in NetInsight

1. View the profile in which you want to create a campaign.

2. Click the **Options** tab.

3. Under **Options** select **Marketing** > **Campaigns**.

4. Click **Add**.

5. Enter a name for the campaign.

   In static campaigns, this is the name that will appear in reports. In dynamic campaigns, the campaign name in reports is the value returned by the campaign parameter.

6. Specify whether the campaign is static or dynamic.

7. Enter the parameter whose value will be used to define unique campaigns. The parameter ID is case-insensitive.

8. Click **Save Options** > **Continue**.

Next you must specify the channels through which you are running this campaign.

To specify campaign channels

If you are specifying channels for a campaign immediately after creating the campaign, begin with step 4 below. Otherwise, begin with step 1.

1. View the profile that contains the campaign for which you are defining channels.

2. Click the **Options** tab.

3. Under **Options** select **Marketing** > **Campaigns**.

4. Select the campaign and click **Channels** > **Add**.

5. Enter a name for the channel.

   In static channels, this is the name that will appear in reports. In dynamic channels, the channel name in reports is the value returned by the channel parameter.

6. Select the channel type that best describes the content source through which you are running this campaign. If you select:

   a. Search engine (PPC/CPM), enter the parameter from which paid keywords will be parsed. The parameter ID is case-insensitive.

   b. Other, enter a description of the channel type.

7. Specify whether this channel is static or dynamic. For dynamic channels:

   a. Enter the parameter whose value will be used to define channels in this campaign. The parameter ID is case-insensitive.

   b. Specify whether to assign a visit to the default channel "None" if the parameter identifier is not found in a parameter string. If left unchecked, Unica NetInsight will search other campaigns and attempt to make a match for attribution.

8. Click **Save Options** > **Continue**.

Next you must specify the campaign segments for this campaign channel.

To specify campaign segments

If you are specifying segments for a campaign channel immediately after creating the channel, begin with step 4 below. Otherwise, begin with step 1.

1. View the profile that contains the campaign for which you are defining segments.

2. Click the **Options** tab.

3. Under **Options** select **Marketing** > **Campaigns**.

4. Select the campaign and click **Channels**.

5. Select the channel and click **Segments** > **Add**.

6. Enter a name for the segment.

In static segments, this is the name that will appear in reports. In dynamic segments, the segment name in reports is the value returned by the segment parameter.

7. Specify whether this channel is static or dynamic. For dynamic channels:

   a. Enter the parameter whose value will be used to define segments in this channel. The parameter ID is case-insensitive.

   b. Specify whether to assign a visit to the default segment "None" if the parameter identifier is not found in a parameter string. If left unchecked, Unica NetInsight will search other channels and attempt to make a match for attribution.

8. Click **Save Options** > **Continue**.

Next, you can optionally specify entry pages associated with this campaign segment. If you choose not to specify entry pages for a dynamic campaign, Unica NetInsight will use parameter values alone to attribute visits to the campaign. Note if you choose not to specify entry pages for a static campaign, all visits will be attributed to the segment's campaign.

To specify entry pages

If you are specifying entry pages for a campaign segment immediately after creating the segment, begin with step 6 below. Otherwise, begin with step 1.

☼ Specifying an entry page is an optional step in defining a NetInsight campaign. If you choose not to specify entry pages for a dynamic campaign, NetInsight will use parameter values alone to attribute visits to the campaign. If you choose not to specify entry pages for a static campaign, all visits will be attributed to this the campaign.

1. View the profile that contains the campaign for which you are defining entry pages.

2. Click the **Options** tab.

3. Under **Options** select **Marketing** > **Campaigns**.

4. Select the campaign and click **Channels**.

5. Select the channel and click **Segments**.

6. Select the segment and click **Entry Pages** > **Add**.

7. Enter a filter that specifies the page(s) visitors responding to your campaign use to access your site.

   For example, if you are tracking a banner ad campaign, specify the page visitors go to after clicking the ad. If you are tracking a print ad campaign, specify the Web site address given in the print ad. You can also use query strings to define your campaign.

8. Click **Add**.

Statistics for this campaign will now be tracked in all subsequently imported data. To track this campaign in data that has already been imported you must delete your profile data and re-import the log files. Note that if you no longer have all previously imported log files, deleting profile data will result in data loss.

About paid search data

- About paid search data
- To analyze paid search data
- Creating paid search campaigns to analyze in Unica NetInsight
- Creating a paid search campaign in Unica NetInsight

About paid search data

If you bid on paid search terms at one or more search engines, you can configure a campaign in Unica NetInsight to analyze traffic driven to your site by paid search terms. This enables you to analyze activity on a search term across search engines and attribute future activity on your site to the paid search terms.

For supported search engines, you can configure the profile to use the paid search integration module to integrate data from the search engines into the Unica NetInsight campaign summaries. This enables you to analyze cost, rank, and impressions for the search terms, as well as number of visitors and visitors' behavior on your site.

About paid search integration module data

Your Unica NetInsight license must be enabled for the paid search integration module before you can use the integration module data.

Once your profile is configured to use the paid search integration module, the paid search data is imported during your normally scheduled data import for the profile. Because search engines release the paid search data at the end of each day, it may take a day or two for the data to appear in your profile, depending on when you update your profile. If you want to see the paid search data sooner, you can update your profile more frequently.

☼ If your password for one of the search engines changes, you must contact Unica to ensure the paid search integration module continues to have access to your paid search data.

The paid search integration brings the following data into Unica NetInsight:

- Match type
- Clickthroughs
- Cost
- Impressions
- Average rank

You can integrate data from the following search engines:

- Google AdWords
- Yahoo Search Marketing
- Microsoft adCenter

About paid search integration reports and components

When a profile is configured to use the paid search integration module, Unica NetInsight creates a separate version of the campaign-related summaries for paid search integration. For example, you have a Campaign Channel Summary and a Paid Search Campaign Channel Summary. The paid search reports include the paid search-specific metrics. Paid search-specific dimensions, metrics, and filters are also available for use on other reports.

Due to Unica NetInsight's sessionization methods, the Paid Search Clicks metric value and the Visits metric value might not be the same for a given row in the report. The Paid Search Clicks value shows the number of times someone clicked a search result to come to your site. The Visits metric shows the number of discrete visits to your site. If a visitor clicks through to your site multiple times before the specified number of minutes between sessions has elapsed, the visitor would count for multiple paid search clicks but only one visit.

To analyze paid search data

If you want to use the paid search integration module, contact Unica technical support to ensure your Unica NetInsight license is enabled for paid search integration.

To analyze paid search data in Unica NetInsight, you must complete the following tasks:

1. Create a paid search campaign at one or more of the supported search engines.

2. Create one or more paid search campaigns in Unica NetInsight.

   If you are not using the paid search integration module, go to the last step now.

3. Contact Unica technical support to provide your sign in information for each search engine at which you have created a campaign.

   Once your paid search integration account is set up, your Unica representative provides you with your account user name and password for the paid search module.

4. Configure the profile to use the paid search integration module.

   You must have the permission for editing integration modules.

5. Update the profile.

   The paid search data may not be immediately available.

Creating paid search campaigns to analyze in Unica NetInsight

Analyzing your paid search campaigns in Unica NetInsight is easier and more robust if you consider the following issues when you configure your campaigns in the search engines.

Campaign and ad group names

You must create a campaign in Unica NetInsight that matches the campaign you create in the search engine, so make note of the campaign and ad group names you use in the search engine. You need to enter this exact text when creating the Unica NetInsight campaigns.

Paid search campaign

You need to specify the paid keyword parameter you use in the search engine. We recommend using the same parameter for all campaigns in a given search engine, and separate parameters for each search engine. For example, you could use the following keywords.

Search engine	Keyword
Google	gpkw
MSN	mpkw
Yahoo	ypkw

Configuring campaigns for analysis across search engines

To analyze the performance of specific search terms across search engines, you must define the campaigns exactly the same in all the search engines.

Defining the destination URL

Unica NetInsight needs the destination URL to be unique for each ad group. (Each ad group is a campaign segment in Unica NetInsight.) If you don't want to create a separate web page for each ad group, you can make the URLs unique by using query string parameters.

You can also use other query string parameters to enable Unica NetInsight to analyze additional information about your paid search campaigns.

For example, suppose you entered the following destination URL for an ad group in Google:

http://www.unicaware.com/ads.htm?adgroup=colorcopiers&keyword={keyword}&variation=2

The query string contains the following information:

- Ad group

- Keyword (Google replaces {keyword} with the keyword the user entered)

- Ad variation

Define the campaign segment using the entry page definition **that contain ads.htm?adgroup=colorcopiers**.

If you define the variation parameter in Unica NetInsight, you can analyze the values in reports.

Creating a paid search campaign in Unica NetInsight

When you create a paid search campaign in Unica NetInsight, the text you enter in certain fields must match exactly the text you entered when you created the campaigns in the search engines. (If you are using the paid search integration module in Unica NetInsight, the text must match exactly.)

Unica NetInsight campaign field	Value
Name of campaign	Name of the search engine campaign
Name of campaign channel	Name of the search engine. Must be one of the following: Google, Yahoo, MSN.
Type of channel	Search engine (PPC/CPM)
Paid keyword parameter	Keyword parameter you specified in the search engine
Name of campaign segment	Name of the ad group in the search engine
Group entry pages	Destination URL for the ad the in the search engine

Analyzing visit cost

- About visit cost
- About collecting visit cost data
- About including visit cost data in Unica NetInsight reports

About visit cost

Visit cost is the amount of advertising money spent to drive a visitor to your site for a particular visit.

About collecting visit cost data

Visit cost data is not contained in log files by default. If you want Unica NetInsight to report on and analyze visit cost data, you will need to do one of two things:

- Configure your Web site to use page tags and pass the visit cost data in the page tag image request using the name-value pair vc=*value*. (For details, see the *Unica Page Tags User's Guide*.) Then, configure your Unica NetInsight profile to use page tags.

- Import visit cost data into the Visit Cost table in the NetInsight database. (For details on the Visit Cost table, see the *Unica NetInsight Database Schema*.)

About including visit cost data in Unica NetInsight reports

The Cost metric and Average Cost metric report on visit cost data. These metrics are available on the Discovery Panel and in the Custom Report Wizard and can be added to any report.

8 Analyzing Visitor Profiles

- About analyzing visitor profiles
- To create a visitor profile
- About changing the order of visitor profiles

About analyzing visitor profiles

Unica NetInsight enables you to track how often the members of various visitor profiles are coming to your Web site. A visitor profile is a group of visitors that you have defined on the Visitor Profile page of your Web server profile. You can sort visitors into groups based on any of a large number of filters, including visit type (repeat or new), visit duration, pages viewed, initial referrer, or content group.

A visit is considered a member of every profile whose filters it matches. Visitor profiles can be used to gain a deeper understanding of exactly how visitors arrive at your site and what interests them most during a visit.

Visitor profile statistics appear on the Visitor Profile Summary.

Visitor profiles are used in scenario reports to track visitor behavior across multiple visits.

To create a visitor profile

1. View the profile in which you want to create a visitor profile.

2. Click the **Options** tab.

3. In the **Options** panel, select **Visitors > Visitor Profiles**.

4. Click **Add**.

5. Enter a name for the profile.

6. Click **Save Options** and then click **Continue**.

7. Select the visitor profile and click **Visitors**.

8. Click **Add Filter**.

9. Select a filter type from the list and click **Continue**.

10. Enter the values for the filter.

11. Click **Continue**.

12. Repeat 8 through 11 until you have entered all the filters you want for the visitor profile.

13. Click **Save Filters** and then click **Continue**.

☼ You cannot add a filter group that contains a visitor profile to a visitor profile. Your visitor profiles will be in effect the next time you run an update.

About changing the order of visitor profiles

You can use the **Move Up** and **Move Down** buttons to change the order of the visitor profiles in the list. However, unlike some other options, changing the order has no affect on the reports.

9 Customizing NetInsight

- About Customizing Unica NetInsight
- Working with views
- Customizing the NetInsight interface
- Working with report lists
- Working with metric lists
- Working with dimension lists
- Working with filter lists

About Customizing Unica NetInsight

This section explains how to customize elements of the profile view, including dimension, filter, and metric lists in Unica NetInsight.

Working with views

- To create a profile view
- To edit a profile view
- To copy a profile view
- To delete a profile view
- To change to another profile view
- About accessing a profile view through a URL

To create a profile view

Before you create a profile view, you need to create the dimension list, filter list, metric list, and report list you want to use.

1. While working with the profile, click **Options**.

---

2. In the left panel, under **Interface**, click **Views**.

   The **View definitions** screen opens.

3. Click **Add**.

   The **View description** screen opens.

4. In the **Name of view (one word)** field, enter a name for the view.

   The name is used both internally and as a shortcut to access the view directly from a browser. You may use only alphanumeric characters and hyphens, and the first character must be a letter. Once the view is created, you cannot change the name.

5. In the **Title of view** field, enter a title for the view.

   The title appears in the list of views.

6. From the **Time period** list, select the time period to be used by the calendar when you first open Unica NetInsight .

7. From the **Report list** list, select the report list to use for the view.

8. From the **Dimension list** list, select the dimension list to use for the view.

9. From the **Filter list** list, select the filter list to use for the view.

10. From the **Metric list** list, select the metric list to use for the view.

11. Click **Save Options**, then click **Continue**.

To edit a profile view

1. While working with the profile, click **Options**.

2. In the left panel, under **Interface**, click **Views**.

   The **View definitions** screen opens.

3. Select the view to edit.

4. Click **Edit**.

   The **View description** screen opens.

5. In the **Title of view** field, enter a title for the view.

   The title appears in the list of views.

6. From the **Time period** list, select the time period to be used by the calendar when you first open Unica NetInsight .

7. From the **Report list** list, select the report list to use for the view.

8. From the **Dimension list** list, select the dimension list to use for the view.

9. From the **Filter list** list, select the filter list to use for the view.

10. From the **Metric list** list, select the metric list to use for the view.

11. Click **Save Options**, then click **Continue**.

To copy a profile view

You can copy an existing profile view to create a new one. This may save time as all settings are copied to the new view.

1. While working with the profile, click **Options**.

2. In the left panel, under **Interface**, click **Views**.

   The **View definitions** screen opens.

3. Select the view to copy.

4. Click **Copy**.

   The **View description** screen opens.

5. In the **Title of view** field, enter a title for the view.

   The title appears in the list of views.

6. From the **Time period** list, select the time period to be used by the calendar when you first open Unica NetInsight .

7. From the **Report list** list, select the report list to use for the view.

8. From the **Dimension list** list, select the dimension list to use for the view.

9. From the **Filter list** list, select the filter list to use for the view.

10. From the **Metric list** list, select the metric list to use for the view.

11. Click **Save Options**, then click **Continue**.

To delete a profile view

1. While working with the profile, click **Options**.

2. In the left panel, under **Interface**, click **Views**.

   The **View definitions** screen opens.

3. Select the view to delete.

4. Click **Delete**.

5. Click **Continue**.

To change to another profile view

If aprofile contains multiple views and if you have permission to change your view, you can change views from within the application interface. For example, you can change from the complete profile view (a predefined view that contains all available dimensions, filters, metrics, and reports) to a view that contains a subset of available dimensions, filters, metrics, and reports.

1. While working with the profile, click the **Reports**tab.

2. In the **Available Reports** panel title bar, click the **Change View** icon.

   A list of available views appears.

3. Click the view to change to.

To return to the current view from the list of available views, click **Close** in the heading of the list. The list of available views closes and the current view does not change.

About accessing a profile view through a URL

Users can access each view defined in the profile options through a distinct URL:

```
http://server-name/profile-name/view-name/index.html
```

where *server-name* is the URL that was entered during installation, *profile-name* is the short profile name, and *view-name* is the name of the view (not the title). The ability to access a view through a URL is a convenient way for users to view the reports that are of the most interest to them.

If an authenticated user who does not have the privilege for changing views attempts to access a view other than the user's default view (and the view the user is trying to access is not restricted by Web server security settings), the application cannot control attempts to access views which are restricted by Web server security settings.

Customizing the NetInsight interface

- About profile views
- About dimension lists
- About filter lists
- About metric lists
- About the profile default role, view, and reporting mode
- About role default view settings

About profile views

A profile view is a set of lists:

- Dimension list

- Metric list

- Filter list

- Report list

You can create profile views to make it more convenient for users who want to view only a subset of, or to provide convenient access to, customized dimensions, filters, metrics, and reports. Views also allow you to group the dimensions, filters, metrics, and reports into folders that may be more intuitive or convenient for your users.

You can combine profile views with user authentication to block some users from viewing some reports.

A default profile view is automatically generated when a profile is created and initially contains all available dimensions, filters, metrics, and reports.

☼ Before you create a profile view, you need to create the dimension list, filter list, metric list, and report list you want to use in the profile and populate those lists with the desired dimensions, filters, metrics, and reports.

About dimension lists

If you need to customize the list of dimensions available to users working with the profile, you can use a dimension list. A dimension list appears in the **Discovery Panel** and in the **Drill to Dimension** pop-up menu. The default dimension list contains all possible dimensions. You can create other dimension lists and assign them to views. Each view can contain one dimension list. Setting up different views with different dimension lists can provide easier access to the relevant data for different users/roles. For example, it may be easier for a campaign designer to use visual selection for targeting with a subset of available dimensions.

About filter lists

If you need to customize the list of filters available to users working with an profile, you can use a filter list. A filter list appears on the **Discovery Panel**. The default filter list contains all possible filters. You can create other filter lists and assign them to views. Each view can contain one filter list. Setting up different views with different filter lists can provide easier access to the relevant filters for different users/roles. For example, sales representatives in the Northeast could have custom filter groups that narrow the prospects to their particular region and sub-regions. Sales representatives in the Southeast would have a different set of filters pertinent to their geography.

About metric lists

If you need to customize the list of metrics available to users working with the profile, you can use a metric list. A metric list appears on the **Discovery Panel**. The default metric list contains all possible metrics. You can create other metric lists and assign them to views. Each view can contain one metric list. For example, you could create a metric list for power users that contains all possible metrics and a simplified metric list for other users that eliminate uncommon metrics (for example, removing min and max purchases, but leaving sum and average purchase metrics).

About the profile default role, view, and reporting mode

You can change the default role, default view, and default reporting mode for a profile. (The initial values are specified using the system-wide default role, view, and reporting mode settings specified by your administrator for profiles of this type.) The default role, view, and reporting mode are used for all users who do not have an explicit role, default view, or reporting mode specified in the administrative options. The default role, view, and reporting mode also affect users who have not logged on before accessing the profile.

Administrators can also set the default role, view, and reporting mode to apply to each new profile users create.

☼ If you specify the default role of **(No Access)** for the profile, it is used for all users who do not have a role for this profile specifically assigned in the profile settings for the user. The user's default role is not used. Select **(No Access)** to limit access to this profile to those users who have a role for this profile specified in the administrative options and who are logged on. Users must log on to access the profile.

If you select **Sample** as the default reporting mode and a sample size has not been specified for the profile, Unica NetInsight uses the **Full** reporting mode. If a user does not have permission to view full reports, the user sees an error when no sample size is specified.

About role default view settings

You can assign each role a default view for each profile. The default view is for users who have that role for the profile, but who do not have an assigned default view for the profile.

Working with report lists

- To create a report list
- To edit a report list
- To copy a report list
- To manage folders for a report list
- To delete a report list

To create a report list

1. While working with the profile, click **Options**.

2. In the left panel, under **Interface**, click **Report Lists**.

   The **Report list definitions** screen opens.

3. Click **Add**.

   The **Report list description** screen opens.

4. In the **Name of report list** field, enter the one-word name for the report list.

   The name is used internally. You may only use alphanumeric characters and hyphens, and the first character must be a letter. Once you have created the report list, you cannot change the name.

5. In the **Title of report list** field, enter a title for the list.

   The title appears as the heading of the report list in the left panel of the **Reports** tab and in the **Discovery Panel**.

6. Click **Save Options**, then click **Continue**.

You must now create folders for the report list.

To edit a report list

1. While working with the profile, click **Options**.

2. In the left panel, under **Interface**, click **Report Lists**.

   The **Report list definition** screen opens.

3. Select the report list to edit.

4. Click **Edit**.

   The **Report list description** screen opens.

5. In the **Title of report list** field, enter a title for the list.

   The title appears as the heading of the report list in the left panel of the **Reports** tab and in the **Discovery Panel**.

6. Click **Save Options**, then click **Continue**.

You can now create folders for the report list.

To copy a report list

You can quickly create a new report list with the same folder and reports definitions as an existing report list by copying it. You can then edit the report list's folders. This may be quicker than creating a new report list.

1. While working with the profile, click **Options**.

2. In the left panel, under **Interface**, click **Metric Lists**.

   The **Report list definition** screen opens.

3. Select the report list to copy.

4. Click **Copy**.

   The **Report list description** screen opens.

5. In the **Name of report list** field, enter the one-word name for the report.

    The name is used internally. You may use only alphanumeric characters and hyphens, and the first character must be a letter. Once you have created the report list, you cannot change the name.

6. In the **Title of report list** field, modify a title for the list as needed.

    The title appears as the heading of the report list in the left panel of the **Reports** tab and in the **Discovery Panel**.

7. Click **Save Options**, then click **Continue**.

You can now modify folders for the report list.

To manage folders for a report list

To modify folders immediately after creating a report list, start with step 5. Otherwise, start with step 1.

1. While working with the profile, click **Options**.

2. In the **Options** panel, select **Interface > Report Lists**.

    The **Report list definition** screen opens.

3. Select the report list for which to manage folders.

4. Click **Folders**.

    The **Folder definitions** screen opens.

5. To add a folder to the report list:

    a. Click **Add**.

    b. In the **Title of folder** field, enter a title.

    c. Click **Save Options**, then click **Continue**.

    d. Continue with step 8 below.

6. To edit an existing folder name:

    a. Select the folder.

    b. Click **Edit**.

    c. In the **Title of folder** field, enter a title.

    d. Click **Save Options**, then click **Continue**.

    e. Continue with step 8 below.

7. To delete an existing folder:

    a. Select the folder.

    b. Click **Delete**.

    c. Click **Continue**.

8. To manage reports in the folder:

    a. Select the folder.

    b. Click **Reports**.

    c. Click **Add** to add a report.

    Then select a report from the **Report source** list, and optionally change the **Report title** field. Click **Save Options**, then click **Continue**.

    d. Select a report and click **Delete** to remove a report from the group.

    Then click **Continue**.

    e. Select a report and click **Edit** to modify the report.

    Then select a report from the **Report source** list, and optionally change the **Report title** field. Click **Save Options**, then click **Continue**.

    f. Click **Save Options**, then click **Continue**.

9. Click **Back to Groups** when finished modifying folders.

To delete a report list

If the report list is currently selected for a view, when you delete the report list, it is removed from the view.

1. While working with the profile, click **Options**.

2. In the **Options** panel, select **Interface > Report Lists**.

    The **Report list definition** screen opens.

3. Select the report list to delete.

4. Click **Delete**.

5. Click **Continue**.

Working with metric lists

- ■ To create a metric list
- ■ To edit a metric list
- ■ To copy a metric list
- ■ To manage groups for a metric list
- ■ To delete a metric list

To create a metric list

1. While working with the profile, click **Options**.

2. In the left panel, under **Interface**, click **Metric Lists**.

The **Metric list definition** screen opens.

3. Click **Add**.

   The **Metric list description** screen opens.

4. In the **Name of metric list** field, enter the one-word name for the metric list.

   The name is used internally. You may use only alphanumeric characters and hyphens, and the first character must be a letter. Once you have created the metric list, you cannot change the name.

5. In the **Title of metric list** field, enter a title for the list.

   The title appears in the list of metric lists. The title also appears as the heading of the metric list in the **Discovery Panel**.

6. Click **Save Options**, then click **Continue**.

You can now create groups for the metric list.

To edit a metric list

1. While working with the profile, click **Options**.

2. In the **Options** panel, select **Interface > Metric Lists**.

   The **Metric list definition** screen opens.

3. Select the metric list to edit.

4. Click **Edit**.

   The **Metric list description** screen opens.

5. In the **Title of metric list** field, enter a title for the list.

   The title appears in the list of metric lists. The title also appears as the heading of the metric list in the Discovery Panel.

6. Click **Save Options**, then click **Continue**.

You can now create groups for the metric list.

To copy a metric list

You can quickly create a new metric list with the same group definitions as an existing metric list by copying it. You can then edit the metric list's groups. This may be quicker than creating a new metric list.

1. While working with the profile, click **Options**.

2. In the left panel, under **Interface**, click **Metric Lists**.

   The **Metric list definition** screen opens.

3. Select the metric list to copy.

4. Click **Copy**.

The **Metric list description** screen opens.

5. In the **Name of metric list** field, enter the one-word name for the metric.

   The name is used internally. You may use only alphanumeric characters and hyphens, and the first character must be a letter. Once you have created the metric list, you cannot change the name.

6. In the **Title of metric list** field, modify a title for the list as needed.

   The title appears in the list of metric lists. The title also appears as the heading of the metric list in the Discovery Panel.

7. Click **Save Options**, then click **Continue**.

You can now modify groups for the metric list.

To manage groups for a metric list

Groups organize the metrics available within each metric list. Groups appear as expandable folders of metrics in the metric list. Groups may not contain other groups.

To modify groups immediately after creating a metric list, start with step 5. Otherwise, start with step 1.

1. While working with the profile, click **Options**.

2. In the left panel, under **Interface**, click **Metric Lists**.

   The **Metric list definition** screen opens.

3. Select the metric list for which to manage groups.

4. Click **Groups**.

   The **Group definitions** screen opens.

5. Add, edit, and delete groups as necessary.

6. To manage metrics in the group:

   a. Select the group.

   b. Click **Metrics**.

   c. Click **Add** to add a metric.

   Then select a metric from the **Metric source** list, and optionally change the **Metric title** field. Click **Save Options**, then click **Continue**.

   d. Select a metric and click **Delete** to remove a metric from the group.

   Then click **Continue**.

   e. Select a metric and click **Edit** to modify the metric.

   Then select a metric from the **Metric source** list, and optionally change the **Metric title** field. Click **Save Options**, then click **Continue**.

   f. Click **Save Options**, then click **Continue**.

7. Click **Back to Groups** when finished modifying metrics.

To delete a metric list

If the metric list is currently selected for a view, when you delete the metric list, it is removed from the view.

1. While working with the profile, click **Options**.

2. In the left panel, under **Interface**, click **Metric Lists**.

    The **Metric list definition** screen opens.

3. Select the metric list to delete.

4. Click **Delete**.

5. Click **Continue**.

Working with dimension lists

- To create a dimension list
- To edit a dimension list
- To copy a dimension list
- To manage groups for a dimension list
- To delete a dimension list

To create a dimension list

1. While working with the profile, click **Options**.

2. In the **Options** panel, select **Interface > Dimension Lists**.

    The **Dimension list definition** screen opens.

3. Click **Add**.

    The **Dimension list description** screen opens.

4. In the **Name of dimension list** field, enter the one-word name for the dimension.

    The name is used internally. You may only use alphanumeric characters and hyphens, and the first character must be a letter. Once you have created the dimension list, you cannot change the name.

5. In the **Title of dimension list** field, enter a title for the list.

    The title appears in the list of dimension lists. The title also appears as the heading of the dimension list in the **Discovery Panel**.

6. Click **Save Options**, then click **Continue**.

You can now create groups for the dimension list.

To edit a dimension list

1. While working with the profile, click **Options**.

2. In the **Options** panel, select **Interface > Dimension Lists**.

    The **Dimension list definition** screen opens.

3. Select the dimension list to edit.

4. Click **Edit**.

    The **Dimension list description** screen opens.

5. In the **Title of dimension list** field, enter a title for the list.

    The title appears in the list of dimension lists. The title also appears as the heading of the dimension list in the Discovery Panel.

6. Click **Save Options**, then click **Continue**.

You can now create groups for the dimension list.

To copy a dimension list

You can quickly create a new dimension list with the same group definitions as an existing dimension list by copying it. You can then edit the dimension list's groups. This may be quicker than creating a new dimension list.

1. While working with the profile, click **Options**.

2. In the **Options** panel, select **Interface > Dimension Lists**.

    The **Dimension list definition** screen opens.

3. Select the dimension list to copy.

4. Click **Copy**.

    The **Dimension list description** screen opens.

5. In the **Name of dimension list** field, enter the one-word name for the dimension.

    The name is used internally. You may only use alphanumeric characters and hyphens, and the first character must be a letter. Once you have created the dimension list, you cannot change the name.

6. In the **Title of dimension list** field, modify a title for the list as needed.

    The title appears in the list of dimension lists. The title also appears as the heading of the dimension list in the Discovery Panel.

7. Click **Save Options**, then click **Continue**.

You can now modify groups for the dimension list.

To manage groups for a dimension list

Groups organize the dimensions available within each dimension list. Groups appear as expandable folders of dimensions in the dimension list. Groups may not contain other groups.

To modify groups immediately after creating a dimension list, start with step 5. Otherwise, start with step 1.

1. While working with the profile, click **Options**.

2. In the left panel, under **Interface**, click **Dimension Lists**.

   The **Dimension list definition** screen opens.

3. Select the dimension list to add groups to.

4. Click **Groups**.

   The **Group definitions** screen opens.

5. Add, edit, and delete groups as necessary.

6. To manage dimensions in the group:

   a. Select the group.

   b. Click **Dimensions**.

   c. Click **Add** to add a dimension.

   Then select a dimension from the **Dimension source** list, and optionally change the **Dimension title** field. Click **Save Options**, then click **Continue**.

   d. Select a dimension and click **Delete** to remove a dimension from the group.

   Then click **Continue**.

   e. Select a dimension and click **Edit** to modify the dimension.

   Then select a dimension from the **Dimension source** list, and optionally change the **Dimension title** field. Click **Save Options**, then click **Continue**.

   f. Click **Save Options**, then click **Continue**.

7. Click **Back to Groups** when finished modifying dimensions.

To delete a dimension list

If the dimension list is currently selected for a view, when you delete the dimension list, it is removed from the view.

1. While working with the profile, click **Options**.

2. In the **Options** panel, select **Interface > Dimension Lists**.

   The **Dimension list definition** screen opens.

3. Select the dimension list to delete.

4. Click **Delete**.

5. Click **Continue**.

Working with filter lists

- To create a filter list
- To edit a filter list
- To copy a filter list
- To manage groups for a filter list
- To delete a filter list

To create a filter list

1. While working with the profile, click **Options**.

2. In the **Options** panel, select **Interface > Filter Lists**.

   The **Filter list definition** screen opens.

3. Click **Add**.

   The **Filter list description** screen opens.

4. In the **Name of filter list** field, enter the one-word name for the filter.

   The name is used internally. You may only use alphanumeric characters and hyphens, and the first character must be a letter. Once you have created the filter list, you cannot change the name.

5. In the **Title of filter list** field, enter a title for the list.

   The title appears in the list of filters lists. The title also appears as the heading of the filter list in the **Discovery Panel**.

6. Click **Save Options**, then click **Continue**.

You can now create groups for the filter list.

To edit a filter list

1. While working with the profile, click **Options**.

2. In the left panel, under **Interface**, click **Filter Lists**.

   The **Filter list definition** screen opens.

3. Select the filter list to edit.

4. Click **Edit**.

   The **Filter list description** screen opens.

5. In the **Title of filter list** field, enter a title for the list.

The title appears in the list of filter lists. The title also appears as the heading of the filter list in the Discovery Panel.

6. Click **Save Options**, then click **Continue**.

You can now create groups for the filter list.

To copy a filter list

You can quickly create a new filter list with the same group definitions as an existing filter list by copying it. You can then edit the filter list's groups. This may be quicker than creating a new filter list.

1. While working with the profile, click **Options**.

2. In the **Options** panel, select **Interface > Filter Lists**.

   The **Filter list definition** screen opens.

3. Select the filter list to copy.

4. Click **Copy**.

   The **Filter list description** screen opens.

5. In the **Name of filter list** field, enter the one-word name for the filter.

   The name is used internally. You may only use alphanumeric characters and hyphens, and the first character must be a letter. Once you have created the filter list, you cannot change the name.

6. In the **Title of filter list** field, modify a title for the list as needed.

   The title appears in the list of filter lists. The title also appears as the heading of the filter list in the Discovery Panel.

7. Click **Save Options**, then click **Continue**.

You can now modify groups for the filter list.

To manage groups for a filter list

Groups organize the filters available within each filter list. Groups appear as expandable folders of filters in the filter list. Groups may not contain other groups.

To modify groups immediately after creating a filter list, start with step 5. Otherwise, start with step 1.

1. While working with the profile, click **Options**.

2. In the left panel, under **Interface**, click **Filter Lists**.

   The **Filter list definition** screen opens.

3. Select the filter list for which to manage groups.

4. Click **Groups**.

The **Group definitions** screen opens.

5. Add, edit, and delete groups as necessary.

6. To manage filters in the group:

    a. Select the group.

    b. Click **Filters**.

    c. Click **Add** to add a filter.

    Then select a filter from the **Filter source** list, and optionally change the **Filter title** field. Click **Save Options**, then click **Continue**.

    d. Select a filter and click **Delete** to remove a filter from the group.

    Then click **Continue**.

    e. Select a Filter and click **Edit** to modify the filter.

    Then select a filter from the **Filter source** list, and optionally change the **Filter title** field. Click **Save Options**, then click **Continue**.

    f. Click **Save Options**, then click **Continue**.

7. Click **Back to Groups** when finished modifying filters..

To delete a filter list

If the filter list is currently selected for a view, when you delete the filter list, it is removed from the view.

1. While working with the profile, click **Options**.

2. In the **Options** panel, select **Interface > Filter Lists**.

    The **Filter list definition** screen opens.

3. Select the filter list to delete.

4. Click **Delete**.

5. Click **Continue**.

10 Using the Overlay Viewer

- About the Overlay Viewer
- To launch the Overlay Viewer
- To add a Unica NetInsight connection
- To connect to NetInsight
- Overlay Viewer options

About the Overlay Viewer

The Unica NetInsight Overlay Viewer is a plug-in to Internet Explorer that overlays links on your Web site with a color-coded heat map, allowing you to see which links are the most popular. From there you can drill into Unica NetInsight reports for greater detail.

☼ The Overlay Viewer does not recognize links that point to JavaScript functions or links in Flash animations.

To install the Overlay Viewer, download and run the Overlay Viewer installer (`nioverlay-<version>.exe`). The installer is available for download from the Software Downloads section of Unica 's Customer Central Web site (account required). If you do not have access to Customer Central, consult your Unica NetInsight administrator to see if a local copy of the installer is available.

☼ The Overlay Viewer will install with Internet Explorer only.

To launch the Overlay Viewer

To launch the Overlay Viewer:

1. In Internet Explorer, navigate to the Web site whose statistics you want to see.

    The URL you enter in the Internet Explorer address bar must match the URL for the site as it was specified in Unica NetInsight when the profile was created. For example, if the URL for the site was specified in Unica NetInsight as http://www.mysite.com, http://mysite.com will not work. Consult your Unica NetInsight administrator if you are not sure of the correct URL.

2. On the Internet Explorer toolbar, click the Unica NetInsight icon (or select **View** > **Explorer Bar** > **Unica NetInsight Overlay Viewer**).

    If your Unica NetInsight installation is protected by HTTP authentication, enter your HTTP user name and password when prompted.

The first time you launch the Overlay Viewer, you will only see a **Configure** and a **Help** icon. You must connect the Overlay Viewer to Unica NetInsight before the rest of its features become available.

To add a Unica NetInsight connection

Before you can connect the Overlay Viewer to Unica NetInsight, you must specify connection information for the installation.

1. In the Overlay Viewer explorer bar, click the **Configure** icon.

2. In **Unica NetInsight Connections**, click **Add**.

3. In the **Name** box, enter the name you want to use for this installation in the **Unica NetInsight Connections** list. This can be anything you choose.

4. In the **URL** box, enter the full URL path to your Unica NetInsight homepage. You can copy the path from your browser's address bar while viewing your Unica NetInsight homepage.

5. If your Unica NetInsight installation requires you to log in, click **More**.

   - If your Unica NetInsight installation requires HTTP authentication to access the server, enter your HTTP user name and password. Internet Explorer can not access this information, so you might still need to enter an HTTP user name and password when you click the **Unica NetInsight** icon during subsequent logins.

   - If your installation requires you to log in to Unica NetInsight itself, enter your Unica NetInsight user name in the **Unica NetInsight User** box and your password in the second **Password** box.

6. Click **Test** to test the connection,

7. Click **OK** to add this installation to the **Unica NetInsight Connections** list.

To connect to NetInsight

After you have created one or more connections to Unica NetInsight, connect as follows:

1. After launching the Overlay Viewer, In the Overlay Viewer explorer bar, click **Configure**.

2. Select the connection you want and click **Connect**.

Overlay Viewer options

Display and data options

The Overlay Viewer explorer bar has four parts: the icons, the Profile section, the Overlay section, and the Report section. The first time you open the Overlay Viewer explorer bar, it will contain only a Configure icon and a Help icon. You will need to connect to a Unica NetInsight installation before you can see the rest of the Overlay Viewer explorer bar.

Option	Description	To Change
Toggle Overlay	You can toggle between displaying the overlay and viewing the Web site without the overlay.	In the Overlay Viewer explorer bar, click the **Toggle Overlay** icon. This icon is a right-pointing triangle when overlay is off and two parallel lines when overlay is on.
Current Profile	The data that displays in the overlay comes from a Unica NetInsight profile. You can change the profile from which the data is taken.	In the Overlay Viewer explorer bar, click **Profile** in the title bar of the top section and select the profile you want from the list of all profiles in all installations for which a connection exists.
Display Type	There are three overlay display types: bar chart, heat map, and link outline. The options in the Overlay section change depending on the display type.	In the Overlay Viewer explorer bar, click **Overlay** in the title bar of the bottom section. Select: • Bar Chart to display small bar charts next to the most popular links. The bar charts will also show the percentage of the selected metric that clicked that link. • Heat Map to see bars of color over the most popular links. The more intense the bar, the more popular the link. • Link Outline to see the colored outline of a box around the most popular links. The more intense the color, the more popular the link. The outline will also show the number of the selected metric that clicked the link. Mouse over any link on the Web page to view the link's full URL and the values for the currently selected metrics.
Transparency	The Transparency option determines the intensity of the color of the bar charts, heat map, or link outlines.	In the **Overlay** section of the Overlay Viewer explorer bar, click **Transparency** and select a percentage.
Maximum number of links	The **Maximum # of links** option determines how many links on your Web site will have a bar chart, heat map, or link outline.	In the **Overlay** section of the Overlay Viewer explorer bar, click **Maximum # of links** and select a number from the list or select **Unlimited**.

Option	Description	To Change
Metric	The **Metric** option determines what criteria is used to determine the most popular links. Bar chart overlays can display multiple metrics. Heat map and link outline overlays display whichever metric is first in the **Selected metrics** list.	1. In the **Overlay** section of the Overlay Viewer explorer bar, click **Metrics**. 2. Move the metrics you want to use into the **Selected metrics** list. Remove any metrics you do not want to use. 3. Put the metrics in the order in which you want them. Select a metric in the **Selected metrics** list and click the **Move Up** or **Move Down** button to move the metric in the list. (Heat map and link outline overlays only display the metric that appears first in the **Selected metrics** list.)
Color	The **Color** option determines the color of the heat map or link outlines. (The **Color** option is not available for bar chart overlays.)	In the **Overlay** section of the Overlay Viewer explorer bar, click **Color**.
Current Report	You can select a report to display in the Overlay Viewer explorer bar. You can make changes to the reports using the Custom Report Wizard in Unica NetInsight.	In the **Report** section of the Overlay Viewer explorer bar, click **Report**.
Drill Anywhere	From the Overlay Viewer, you can generate a new Unica NetInsight report that uses the Web site page you are viewing as a filter. The report will be displayed in Unica NetInsight. Click the Filter icon:	Click the Filter icon: • To see a report that is filtered on the current Web page, select **Drill to Report** and select the report. • To generate a trend report that is filtered on the current Web page, select **Trend By** and select a time period.
Update Data	This will retrieve the latest data from the profile.	In the Overlay Viewer explorer bar, click the **Refresh Overlay** icon or press **Alt+F5**.

Date range options

You select the time frame from the calendar. The tabs along the bottom of the calendar are (from left to right) View Month, View Quarter, View Year, View All, View Custom, and Apply Calendar.

Option	Description
View Month	Display data from the shown month. If the profile contains data for a day, it is shaded. If the Overlay Viewer displays data for only some of the days for which the profile contains data in the month, these days are grayed.
View Quarter	Display data from the shown quarter.
View Year	Display data from the shown year.
View All	Display data from the profile's entire date range.
View Custom	Specify a custom time period.
Apply Calendar	Regenerate the current report using the time period specified in the calendar.

11 Using Regular Expressions with NetInsight

- About regular expressions
- Basics of regular expressions
- Metacharacters
- Metacharacter examples
- Special characters
- Special character examples
- Combining metacharacters
- Using regular expressions

About regular expressions

You can use regular expressions when setting profile options.

Depending on the database you are using, you may also be able to use regular expressions when setting filters for reports. This lets you find specific report data quickly and accurately. The syntax is similar to that used in Perl.

If you are unfamiliar with regular expression syntax, there are many tutorials on the Internet.

Basics of regular expressions

A regular expression is a way of specifying a pattern in a text string. For example, if you specify the pattern `somephrase` the regular expression rules matching engine finds any instance of the text `somephrase` in the field you are searching. It matches `somephrase, somephrases, abcsomephrase123,` and `Here is somephrase.`

To cite a more useful example, you can use regular expressions to generate a report on all requests for HTM and HTML files on your site. In the **Included Pages** option, enter the **filter that match the regular expression htm**. This gives you a report on any page that has `htm` in its file name. Assuming you have not used `htm` as anything other than a file extension, you will get a report on all requests for HTML files. The report will include requests for files ending with `html` because the string `html` includes the string `htm`.

☼ This assumes that either all your file names have lowercase extensions or that you have not enabled case-sensitivity in your profile options. (When case-sensitivity is not enabled, all pages, files, clips, and user names are imported as lowercase characters.

Metacharacters

The real power of regular expressions is in the use of metacharacters. Metacharacters allow you to construct expressions that match specific text patterns in an extremely flexible way.

The following table lists and describes the metacharacters.

Metacharacter	Meaning
. (period)	Matches any one character no matter what the character is
?	Matches the character immediately before it either zero times or one time
*	Matches the character immediately before it any number of times including zero (the character may not be in the string at all)
+	Matches the character immediately before it one or more times (the character must be in the string at least once)
^	Indicates that the characters which follow are at the start of the string only
$	Indicates that the characters which precede it are at the end of the string
\d	Matches any single decimal digit (0-9)

Metacharacter	Meaning
\D	Matches any character that is not a decimal digit
\s	Matches a tab or space character
\S	Matches any character that is not a tab or a space
\w	Matches any letter, any digit, or the underscore character
\W	Matches any character which is not a letter, a digit, or the underscore
\	Escape character allowing the use of any of the metacharacters with their regular keyboard meaning. For example, \. matches a period (.) in a regular expression. (A period (.) without a preceding escape character matches any one character no matter what the character is.)

Metacharacter examples

The following table shows examples that illustrate the use of metacharacters.

Regular Expression	Matches	Reason
up.own	uptown updown up own	Period (.) matches any character, even a space.
.exe	aexe 123exe 1exejfg	Period (.) matches any character, even a space.
\.exe	.exe prog.exe	Backslash (\) tells the rules matching engine you are looking for a period, not using the period as a metacharacter.
ab?cdef	acdef abcdef abcdefg xyxacdefghij	Question mark (?) matches both zero instances of b and one instance of b.

Regular Expression	Matches	Reason
ntcgi\?johnswift	ntcgi?johnswift	Backslash (\) tells the rules matching engine you are looking for a question mark, not using the question mark as a meta-character.
abc*defg	abdefg abcdefg xyzabcdefghij abcccccdefg	Asterisk (*) matches the c zero or more times.
abc+defg	abcdefg abccdefg xygabcdefghij abcccdefghij	Plus (+) matches the c one or more times.
free	free freedom innisfree	By default, text is matched wherever it is found in the text string.
^free	free freedom	Caret (^) only matches the beginning of the text string.
free$	free innisfree	Dollar sign ($) only matches at the end of the text string.

Special characters

In addition to metacharacters, you can use four other characters to indicate the relationships between various parts of the regular expression.

Character	Meaning
|	Tells the rules matching engine to match the text to the left of the pipe or the text to the right of the pipe
[ ]	Contains a set of characters and tells the rules matching engine to match any character within that set
( )	Indicates that the part of the expression that is within the parentheses is to be considered as one unit

Character	Meaning
^ [abc]	Negates the set of characters in brackets so that text must contain a character at that point in the expression but it cannot be any of the characters inside the brackets

Special character examples

The following table shows examples that illustrate the use of the special characters.

Example	Matches	Does Not Match	Meaning
they (would | should)	they would they should they should have they would have		Parentheses and pipe indicate text must contain at least one instance of either `would` or `should`
[cz]one	cone zone	one	Brackets indicate either a `c` or a `z` must be present for a match
[^abc]xyz	dxyz mxyz	axyz bxyz cxyz xyz	Brackets indicate there must be a character at that point in the expression, but the caret indicates that character cannot be `a`, `b`, or `c`

Combining metacharacters

You can combine several metacharacters in one regular expression. One of the most common combinations is the period and asterisk (.*) which matches a string of any length including the null string.

Regular Expression	Matches	Reason
.*\.cgi$	any string ending in .cgi	The period and asterisk (.*) combination matches any string. The backslash (\) tells the matching rules engine to look for a period, not use the period as a metacharacter.

Regular Expression	Matches	Reason
.*.cgi$	acgi thomcgi file.cgi	The second period is not pre-ceded by a backslash (\), so it is being used as a metacharacter to match any one character no matter what the character is. A more compact form of writing the same pattern would be `.+cgi`.

Using regular expressions

You can use regular expressions when setting many options. Depending on your database type, you can use regular expressions to define filter groups or visitor profiles and when filtering reports. If regular expressions are not available, you can use the special characters for pattern matching supported by your database.

For example, Unica NetInsight OnDemand uses regular expressions heavily in both its browser and platform options. The following regular expression defines which user agents in your log files are classified as the Microsoft Internet Explorer Web browser:

```
^
```

```
Mozilla/.*MSIE (\d+\.)
```

To see this regular expression: 1) display a profile; 2) click the **Options** tab; 3) in the **Options** panel, select **Visitors** or **Users > Browsers > Microsoft Internet Explorer > User Agents**.

If a user agent in your log file matches the regular expression above, then the browser used by that user will be listed as Microsoft Internet Explorer in your Browser Summary.

By breaking down the regular expression, you can see exactly what it is looking for.

Expression	Meaning
^	The string must start with the characters that follow (Mozilla/)
Mozilla/	The characters that must be at the beginning of the string
.*	The string must start with the characters that follow (Mozilla/)
MSIE	The next string of characters that must be present (including a space after the E)
( )	The contents of the parentheses are considered a single unit
\d	Matches any decimal digit

Expression	Meaning
\.	Modifies the \d so the rules matching engine looks for one or more digits

The above expression will match the following strings:

```
Mozilla/4.0 (compatible; MSIE 4.01; MSN 2.5; Windows 98)
Mozilla/4.0 (compatible; MSIE 4.01; Windows 95)
Mozilla/4.0 (compatible; MSIE 5.0; Windows 95; AIT; DigExt)
```

Because the regular expression includes information about the browser version (\d+\.), if you have selected the Append the version number check box for the browser, the first two strings above appear as Microsoft Internet Explorer 4 and the last string will appear as Microsoft Internet Explorer 5.

Depending on your database type you can also use the **That match the regular expression** filter with a regular expression when filtering a report. For example, you could use the Custom Report Wizard to create a custom Page Summary that only contains data for visitors who were using NetBSD, FreeBSD, or OpenBSD, but not BSDI. You would need to enter **That match the regular expression** .*BSD$ as the complete platform filter. The period and asterisk (.*) allows a match on any characters that precede BSD in the string, but because of the dollar sign ($), the string must end in BSD.

If you are interested in examining your server's performance when it calls CGI programs, you can use the Custom Report Wizard to create a custom Server Performance Summary with the filter That match the regular expression.*\.cgi$ (provided your CGI programs end with that extension). When you run the report, you will see only statistics on how your server performs when a CGI program is called.