

# IM.DASHBOARDConfigurator and DASHBOARDView USER GUIDE

## INTERNET Marketing Toolkit



Internet marketing



**IM.DASHBOARD**Configurator  
and **DASHBOARDView**  
**USER GUIDE**



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## Welcome to Your Dashboard

The Dashboard tool in your Internet Marketing Toolkit is divided into two parts:

**IM.Dashboard Configurator:** IM.DashBoard Configurator allows site administrators to fully configure overviews of customer activity. Any action users take with your OpenSites modules can be set up, via IM.Dashboard Configurator, to be tracked, compared, reported on, and even graphed.

**The Dashboard View:** The Dashboard View displays graphically the conditions you set up in IM.Dashboard Configurator. You can create multiple views and move freely between them.

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### Configuring

Configuring your dashboard involves three basic steps:

- 1) Create your basic dashboard objects:** Dashboard objects are the basic user actions and customer data you want to measure and display. Think of a dashboard object as a gauge, the thing that does the actual measuring. You might, for example, set up a dashboard object to report how many times a certain banner is clicked on or how many users have signed up.
- 2) Create Object Groups:** After you've created your basic Dashboard objects, you then package them into Object Groups, adding an appropriate title. Think of an object group as one or more gauges wired up to a panel with all the appropriate labeling that helps you understand what the dial or needle is reporting.
- 3) Create your dashboard and place your Group Objects:** Finally, you define how your dashboard should look (using either a predefined layout or your own custom layout) and then you place your Group Objects on the dashboard. So like a real dashboard, you can snap in various panels (group objects) of gauges (basic objects) into the dashboard.

## Section 1: Dashboard Object


Before you begin displaying your Internet marketing data on your dashboard, you need to create what kind of data you will display on the Dashboard. The information displayed is called a Dashboard object. You can configure Dashboard objects with the **Dashboard Objects** tab.




Figure 1-1 The Dashboard Objects page with predefined Dashboard Objects

When you click on the **Dashboard Objects** tab for the first time, your active modules will be represented by expandable nodes. Dashboard objects are organized by module.

### Predefined Objects

If you expand a module node (either by clicking on the **+** icon or clicking the **Expand All** link), you will see some pre-defined objects. These are Dashboard objects identified by a "Predefined Object" label and the lack of a **Delete**  icon.

Each module pre-populates the grid with several commonly used objects specific to the module. If you click the **Edit**  icon, you can modify a Predefined Object but you cannot over write it. After modifying the Predefined Object, click the **Save As** button, which saves a modified, renamed copy to your Dashboard Objects grid.



## Creating an Object

The screenshot shows the 'Object Details' page in the IM.DASHBOARDConfigurator. The page has a green header with 'myp1' on the left and 'IM.DASHBOARDConfigurator' on the right. Below the header is a navigation bar with 'Dashboard Objects', 'Object Groups', and 'Dashboard Views'. The main content area is titled 'Dashboard Object > Object Details'. The form contains the following fields:

- Name:** Top Documents Downloaded
- Note:** (Empty text area)
- Module Report on:** Document Manager pro
- Reporting Type:** Top

An 'Add New Info' button is located at the bottom left of the form. The footer of the page shows 'INTERNET Marketing Toolkit'.

Figure 1-2 The Dashboard Details

- 1) Click the **Dashboard Objects** tab. The **Dashboard Objects** page appears (see Figure 1-1).
- 2) Click the **Add New Object** button. The **Object Details** page appears (see Figure 1-2).
- 3) In the **Object Name** field, enter the name of your object, for example "Banner Click Throughs".
- 4) Enter text in the **Note** field to remind you what this object displays.
- 5) From the **Module Report On** drop-down box, select which module's actions you wish to track and display in your dashboard.
- 6) From the **Reporting Type** drop-down box, select the type of data to display:

**Total:** The total number of tracked actions taken by users.

**Compare:** Compare two existing Dashboard Objects.

**Top:** Display the records with the highest total of whatever condition indicated.

**Graph:** Graph the condition results along an X and Y axis.

- 7) Click the **Add New Info** button.

## Setting Up Content (Total, Top, and Graph types)

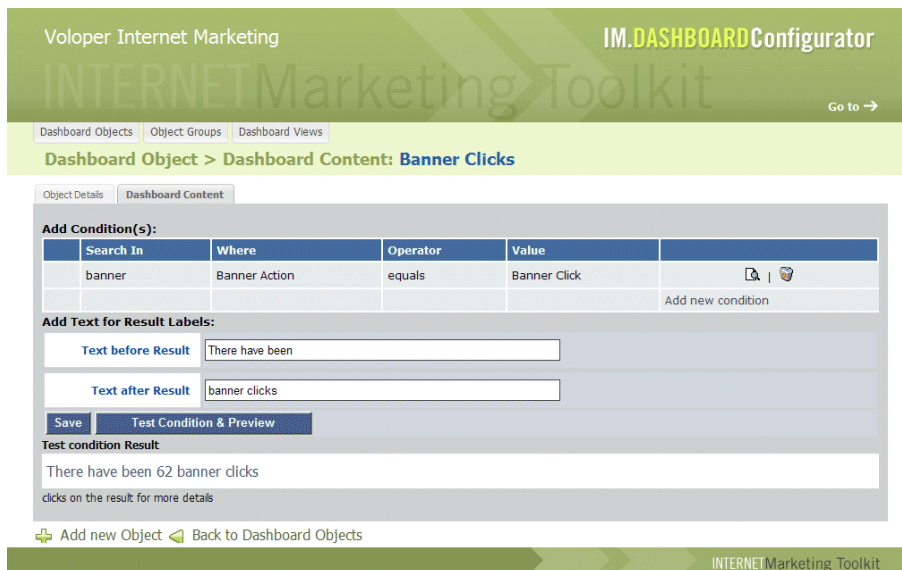


Figure 1-3 Dashboard Content

After clicking the **Add New Info** button, you can now set up your object's content under the **Dashboard Content** tab (see Figure 1-3). You define the content by defining a condition. A condition defines what information you want to display. You define what you want to display based on one or more conditions.

To set up a condition:

- 1) Click the **Add New Condition** link.

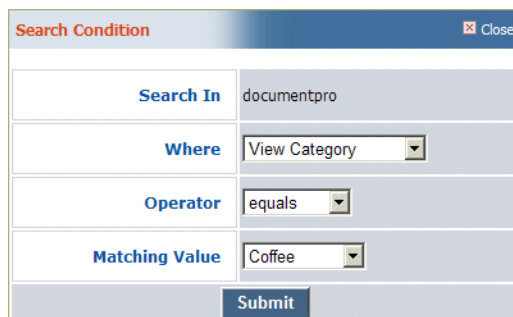


Figure 1-4 Search Condition box

- 2) The **Search Condition** box appears (see Figure 1-4). The **Search In** field displays the module you selected in the **Dashboard Data Details** page.



- 3) From the **Where** drop-drop down box, select which pre-defined module action or total you wish to filter on. Each module keeps running totals of certain areas of the module and certain specific actions users take with a module. For example, the Banner module keeps track of banners and actions related to the banners (e.g., how many clicks a banner receives). The Webboard module keeps track of the message board and actions users perform with the message board (e.g., number of new posts or categories viewed).
- 4) From the **Operator** drop-down box select one of the following (available options depend on your **Where** selection):

| Operator                  | Description  |
|---------------------------|--|
| <b>Equals</b>             | Select <b>equals</b> if you wish the condition to report on the follow on matching value.  |
| <b>Not equals</b>         | Select <b>not equals</b> if you wish the condition to report only on the conditions that don't match the follow on value.                                    |
| <b>Larger</b>             | Select <b>Larger</b> if you wish the condition to report only on conditions when the total is larger than the matching value.                                |
| <b>Smaller</b>            | Select <b>Smaller</b> if you wish the condition to report only on conditions when the total is smaller than the matching value.                              |
| <b>Larger or equal</b>    | Select <b>Larger or equal</b> if you wish the condition to report only on conditions when the total is greater than or equal to the matching value.          |
| <b>Smaller or equal</b>   | Select <b>Smaller or equal</b> if you wish the condition to report only on conditions when the total is less than or equal to the matching value.            |
| <b>Greater than today</b> | Select <b>Greater than today</b> if you wish the condition to report only on conditions when the date falls after the current date (so future events).       |
| <b>Lesser than today</b>  | Select <b>Lesser than today</b> if you wish the condition to report only on conditions when the date matches dates before the current date (so past events). |

- 5) Click the **Submit** button to save your condition and return to the Conditions grid. Click the **Submit and Add Another Condition** button if you would like to immediately define another condition.
- 6) When you are done creating conditions for your filter, click the **Save** button. To immediately see how your results will display on your Dashboard, click the **Test Condition & Preview** button.

## Compare Dashboard Object



Figure 1-5 Search Condition box

If you've selected the **Compare** option, you do not have to create conditional filters. You will be presented with two drop-down boxes. Each drop-down box is populated with the names of other existing Dashboard Objects.

- 1) Select which two objects you wish to compare.
- 2) Use the **Display Result As** drop-down box to define whether you want the object to report the comparison as a percentage or as an integer.
- 3) Click the **Save** button.

A compare object displays, along with the total or percentage, the results in the form of either an up arrow (the first object has a greater value than the second object), down arrow (the first object has a lower value than the second object), or an up/down arrow to indicate there's no difference.

The total reported is the result of *Object 2* – *Object 1*. The percentage reported is *Object 2* / *Object 1*.

## Top Dashboard Object

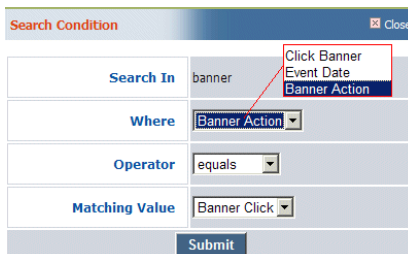


Figure 1-6 Always Select the Action option for a Top object



The Top object will only report if you select an **action** option from the **Where** drop-down box in the **Search Condition** pop-up (see Figure 1-6).



Figure 1-7 Dashboard Contents tab



After you've set up the conditional filters for your **Top** dashboard object, you need to define how many of the top items will appear on your dashboard. Enter this number in the **Number of Displayed Results** field. For example if you want to see the top 3 most clicked banners, enter a 3 in the field. Click the **Save** button when you are done setting up your Top object.

## Graph Dashboard Object

Dashboard Object > Dashboard Content: **Banner Clicks**

Object Details | Dashboard Content

**Add Condition(s):**

| Search In         | Where         | Operator | Value                 |   |
|-------------------|---------------|----------|-----------------------|---|
| documentpro       | View Document | equals   | Know your sports cups |     |
| Add new condition |               |          |                       |   |


**Select graph parameters:**


**Graph Title**

**Horizontal-Axis Label**

**Vertical-Axis Label**

**Graph Type**

**Line Color**  

**Filled Color**  

**Date Format**

Save | Test Condition & Preview

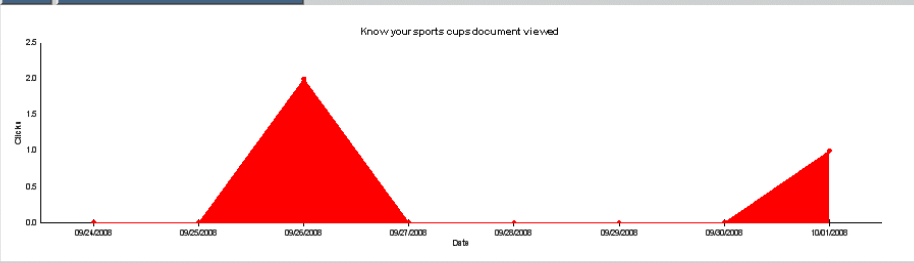


Figure 1-8 Graph Object setup

After you've set up the conditional filters for your **Graph** dashboard object, you need to define the type of graph and its appearance.



| Item                         | Description   |
|------------------------------|---|
| <b>Graph Title</b>           | Enter text you want to appear above the graph as a title.   |
| <b>Horizontal-Axis Label</b> | Enter text for the X Axis.  |
| <b>Vertical-Axis Label</b>   | Enter text for the Y Axis.  |
| <b>Graph Type</b>            | Choose from a line, bar, or pie graph.  |
| <b>Line Color</b>            | Enter a hexadecimal color code for your graph's line or ruling line around a pie or bar chart. Click the color pallet for a pop-up box to |



| Item                | Description   |
|---------------------|---|
|                     | select colors visually.   |
| <b>Filled Color</b> | Enter a hexadecimal color code for your graph's fill color, that is the color under a line chart or the color filling a bar graph. Click the color pallet for a pop-up box to select co |
| <b>Date Format</b>  | Select a date format for the X Axis using the drop-down box.  |

---

## Editing and Deleting a Dashboard Object

- 1) To edit a Dashboard Object click the **Dashboard Objects** tab.
- 2) The **Dashboard Data Details** page appears.
- 3) Click the **Delete**  icon associated with the object you wish to delete.
- 4) Click the **Edit**  icon associated with the object you wish to edit.
- 5) To modify the details (name, report type, etc.) click the **Object Details** tab. Click the **Update** button when you're done.
- 6) To modify contents of this object, click the **Dashboard Content** tab. Click the **Save** button when you're done.
- 7) Click the **OK** button.

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## Section 2: Object Groups

The **Object Group** option allows you to combine two or more **Dashboard Objects** into one. This allows you to place the objects as a group on the Dashboard.



Figure 2-1 Object Groups tab

### Creating an Object Group

- 1) Click the **Object Groups** tab.
- 2) The **Object Group** page appears (see Figure 2-1). Click the **Add New Object Group** button.
- 3) From the **Object Group Setup** page, select to create your group from a blank template or a predefined template.



If you select blank:

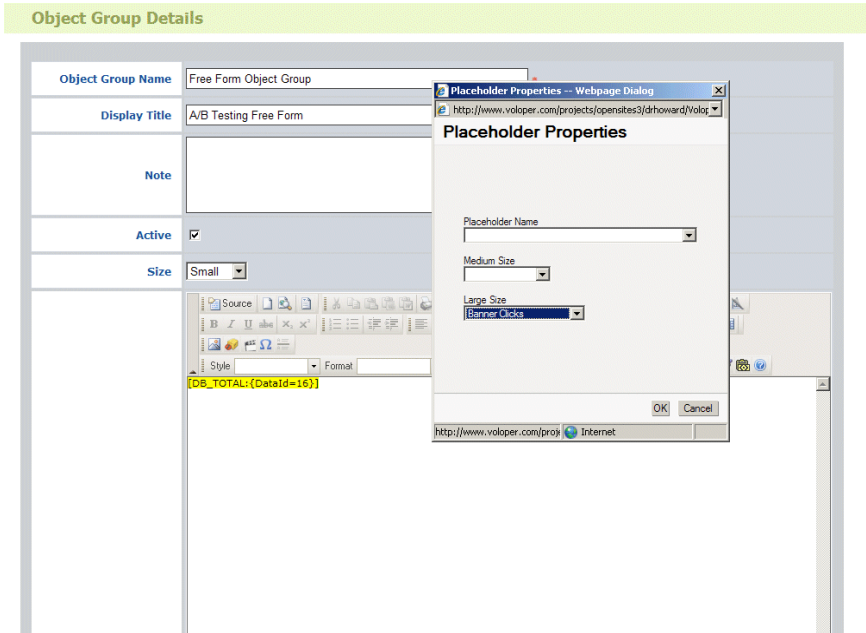
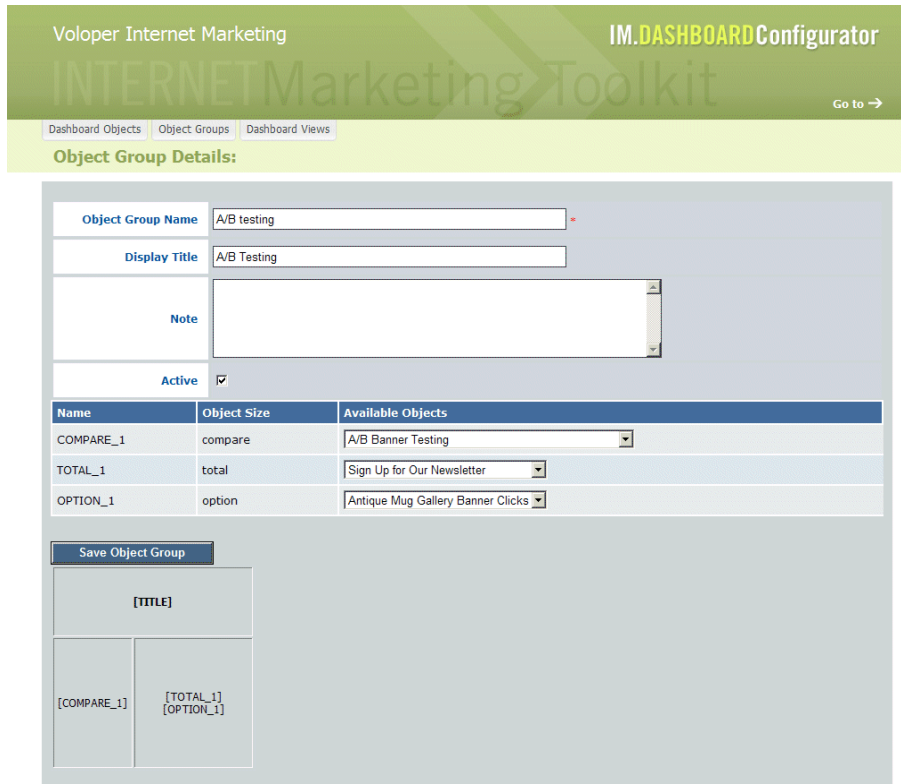


Figure 2-2 Creating an Object Group using no template

- 4) In the **Object Group Name** field, enter a name for this group.
- 5) In the **Display Title** field, enter the title you wish to appear at the top of your group.
- 6) Click the **Active** checkbox to make it active and available for use.
- 7) From the **Size** drop-down box, select whether this should be a small, medium, or large group object.
- 8) In the Detail area you can now place your created dashboard objects. Use the WCE tools to format this group as desired. To place **Dashboard Objects**, click the Place Holder button **[P]** in the WCE toolbar. You will see a popup window with a drop-down box containing a list of your created objects. Select an object and click **Ok**.
- 9) Click the **Submit** button when you're finished.

If you select pre-defined:



The screenshot shows the 'IM.DASHBOARDConfigurator' interface. At the top, there are navigation tabs for 'Dashboard Objects', 'Object Groups', and 'Dashboard Views'. The 'Object Groups' tab is selected, and the page title is 'Object Group Details:'. Below this, there is a form with the following fields:

- Object Group Name:** A/B testing
- Display Title:** A/B Testing
- Note:** A large text area for notes.
- Active:** A checked checkbox.

Below the form is a table with the following data:

| Name      | Object Size | Available Objects                 |
|-----------|-------------|-----------------------------------|
| COMPARE_1 | compare     | A/B Banner Testing                |
| TOTAL_1   | total       | Sign Up for Our Newsletter        |
| OPTION_1  | option      | Antique Mug Gallery Banner Clicks |

At the bottom of the form, there is a 'Save Object Group' button and a wireframe preview showing the layout of the dashboard objects, including a title area, a compare object area, and a total/object area.



Figure 2-3 Creating an Object Group using a template

- 10) Select the desired size (small, medium or large) and click the **Submit** button.
- 11) In the **Object Group Name** field, enter a name for this group.
- 12) In the **Display Title** field, enter the title you wish to appear at the top of your group.
- 13) Click the **Active** checkbox to make it active and available for use.
- 14) Use the drop-down boxes to populate the **Group Object**. Below you will see a "wire frame" indicating which areas of the group you can populate. A medium or large **Group Object** holds the title and one **Dashboard Object**. A small **Group Object** holds the title, a compare object, and one or two total objects (ideally the objects used in the compare).
- 15) Click **Save Object Group** when you are done. You will see a full preview of how your **Group Object** will look.

## Editing an Objects Group

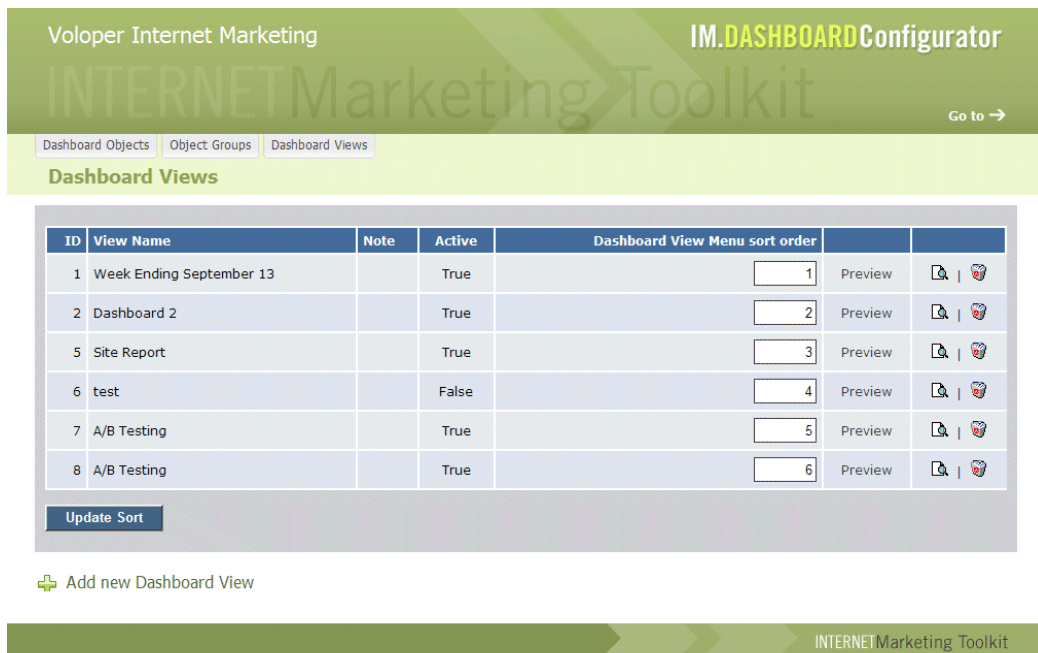
- 1) To edit an Objects Group click the **Object Groups** tab.
- 2) The **Object Groups Details** page appears.















- 3) To delete, click the **Delete**  icon associated with the object you wish to delete.
- 4) To edit, click the **Edit**  icon associated with the object you wish to edit.
- 5) Modify the name, title, or object(s) as desired.
- 6) Click **Save Object Group** when you are done. You will see a full preview of how your Group Object will look.

## Section 3: Dashboard View

The Dashboard View List lets you set up how your groups are placed on your dashboard. If you use a predefined layout, objects are placed in a grid. Think of the grid as two rows. Each row you can subdivide into one large cell, two medium cells, four small cells, or permutations of medium and small cells. In each cell, you then place your Object Groups.



The screenshot shows the 'IM.DASHBOARDConfigurator' interface. At the top, there are navigation tabs for 'Dashboard Objects', 'Object Groups', and 'Dashboard Views'. Below the tabs is a table with the following data:

| ID | View Name                | Note | Active | Dashboard View Menu sort order |         |   |
|----|--------------------------|------|--------|--------------------------------|---------|---|
| 1  | Week Ending September 13 |      | True   | <input type="text" value="1"/> | Preview |         |
| 2  | Dashboard 2              |      | True   | <input type="text" value="2"/> | Preview |         |
| 5  | Site Report              |      | True   | <input type="text" value="3"/> | Preview |         |
| 6  | test                     |      | False  | <input type="text" value="4"/> | Preview |         |
| 7  | A/B Testing              |      | True   | <input type="text" value="5"/> | Preview |       |
| 8  | A/B Testing              |      | True   | <input type="text" value="6"/> | Preview |     |

Below the table is an 'Update Sort' button and an 'Add new Dashboard View' button with a plus icon.

Figure 3-1 Creating an Object Group using a template

### Adding a New Dashboard View

- 1) To add a new dashboard view, click the **Dashboard Views** tab.
- 2) Click the **Add New Dashboard View** button.
- 3) From the **Dashboard View Setup** page, select to create your dashboard from a blank template or a predefined template.



If you select blank:

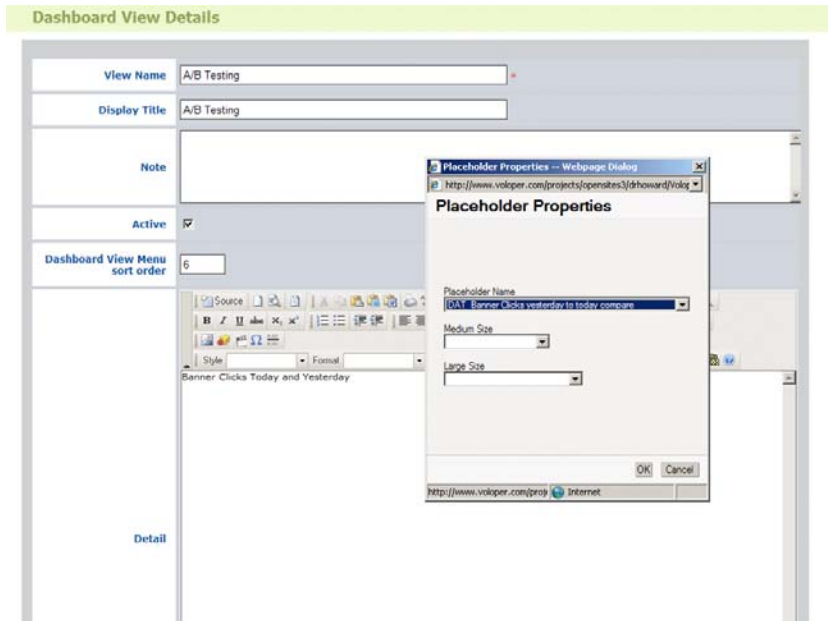


Figure 3-2 Creating a Dashboard View using no template

- 4) In the **View Name** field, enter a name for this Dashboard View.
- 5) In the **Display Title** field, enter the title you wish to appear at the top of your dashboard.
- 6) Click the **Active** checkbox to make it active and available for use.
- 7) In the **Sort Order** field, enter a lower number if you want this view to appear at the top in your Dashboard View list or a higher number if you wish this view to appear at the bottom of your list.
- 8) In the **Detail** area you can now place your created objects. Use the WCE tools to format this group as desired. To place objects, click the Place Holder button **[P]** in the WCE toolbar. You will see a popup window with a drop-down box containing a list of your created objects. Select an object and click **Ok**.
- 9) Click the **Add New Info** button when you're finished.

If you select pre-defined:

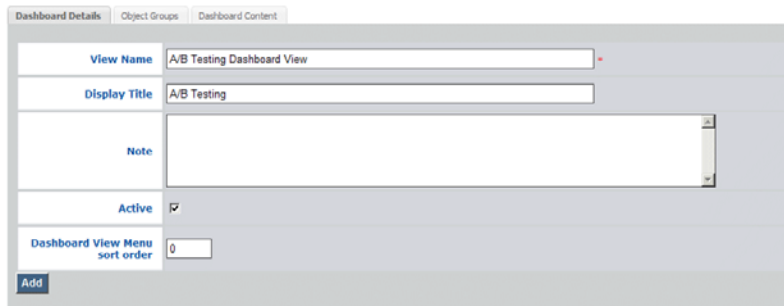


Figure 3-3 Dashboard Details tab

- 10) Select a pre-defined layout from a gallery of thumbnails. Click **Submit**.
- 11) You are taken to the Dashboard View Setup screen's **Dashboard Details** tab (see Figure 3-3).
- 12) In the **View Name** field, enter a name for this Dashboard View.
- 13) In the **Display Title** field, enter the title you wish to appear at the top of your dashboard.
- 14) Click the **Active** checkbox to make it active and available for use.
- 15) In the **Sort Order** field, enter a lower number if you want this view to appear at the top in your Dashboard View grid or a higher number if you wish this view to appear at the bottom of your grid.
- 16) Click the **Add** button.

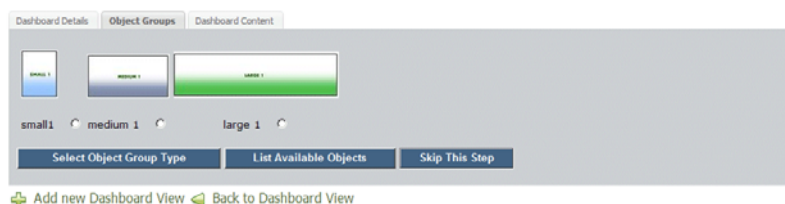


Figure 3-4 Object Groups tab

- 17) You are taken to the **Object Groups** tab (see Figure 3-4). If you've not created any Object Groups you can create Object Groups on this tab. If you're not sure you have already created the Object Group you need, click the **List Available Objects** button.
- 18) If you've already created Object Groups, click **Skip This Step**.
- 19) If you need to create an Object Group, use the radio buttons to select what kind of Object Group you wish to create (small, medium, or large) and click the **Select Object Group Type** button. For more information on creating Object Groups see "Creating an Object Group" on page 13.

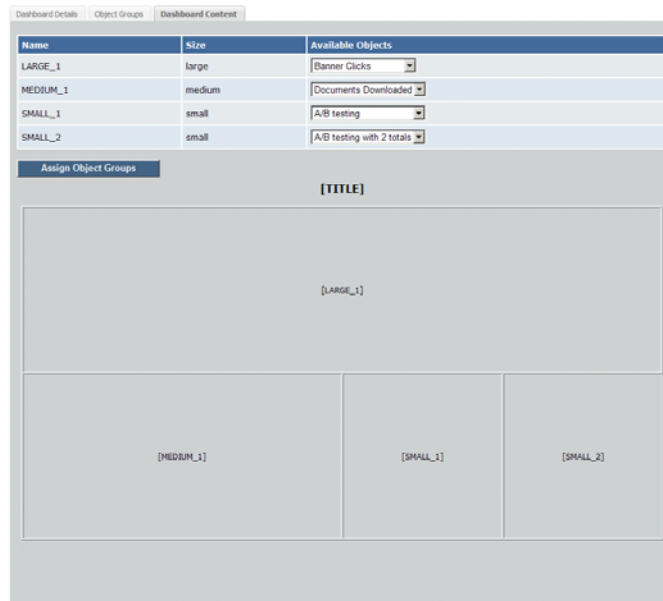




Figure 3-5 Dashboard Content tab

- 20) After creating any Object Groups you desire, click the **Move to Next Step** button. You are taken to the Dashboard Content page.
- 21) You will see a "wireframe" representation of your dashboard. Each cell in your wireframe will have an associated drop-down box. Each drop-down box is populated with previously created Object Groups. You can populate the cells of your dashboard by selecting which Object Group you wish to appear in that cell.
- 22) When you've assigned Object Groups, click the **Assign Object Groups** button. You will see a preview of your dashboard.

## Editing and Deleting a New Dashboard View

- 1) Click the **Dashboard Views** tab. The **Dashboard View** page appears.
- 2) To delete, click the **Delete**  icon associated with the dashboard you wish to delete.
- 3) If you wish to preview how the view will look, click the assigned **Preview** link.
- 4) If you wish to change the sort order of all the views, enter new sort orders in the **Dashboard View Menu Sort Order** column. Click the **Update Sort** button.
- 5) To edit, click the **Edit**  icon associated with the dashboard you wish to edit.
- 6) Click the tabs and edit the content as required.
- 7) Click the **OK** button.

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## Section 4: Your Dashboard



Figure 4-1 A Dashboard View

### Accessing Your Dashboard

Once you have created a dashboard, you can view it from your Administration page by doing the following:

- 1) Mouse over the **Go to** -> link above the tab bar.
- 2) When you hover over the link, a small submenu appears. Select the **Dashboard View** option.

### Accessing Multiple Views

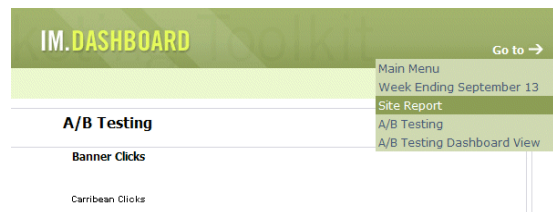


Figure 4-2 Switching to another view

If you have created more than one Dashboard view, you can switch to another view by doing the following:

- 1) Mouse over the **Go to** -> link.



- 2) When you hover over the link, a small submenu appears with your active Dashboard views.
- 3) Select a view from the submenu.

## Section 5: The Web Content Editor Toolbar Page

 Open File

 Save File

 Format

 Font

 Bold

 Italic

 Underline


 Color

 Align Left

 Align Center

 Align Right

 Align Center

 Number List

 Bullet List

 Decrease Indent

 Increase Indent

 Break

 Subscript

 Superscript


 Horizontal Line


 Special Character

 Cut

 Copy

 Paste

 Paste Text

 Paste from Word

 Undo

 Redo


 Find Text

 Insert Table

 Show Invisible Borders

 Insert Row

 Delete Row

 Insert Column


 Delete Column


 Insert Cell

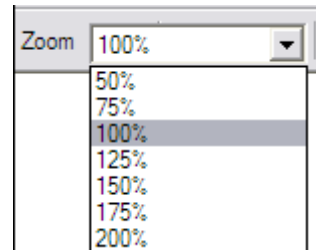
 Delete Cell

 Merge Cell

 Split Cell

 Style Sheet Manager

 Apply Style




 Link

 Unlink

 Select All

 Remove Format

 Show Details

 Insert File

 Insert Image

 Insert Rollover

 Insert Thumbnail

 Insert Script

 Insert HTML Tag



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