

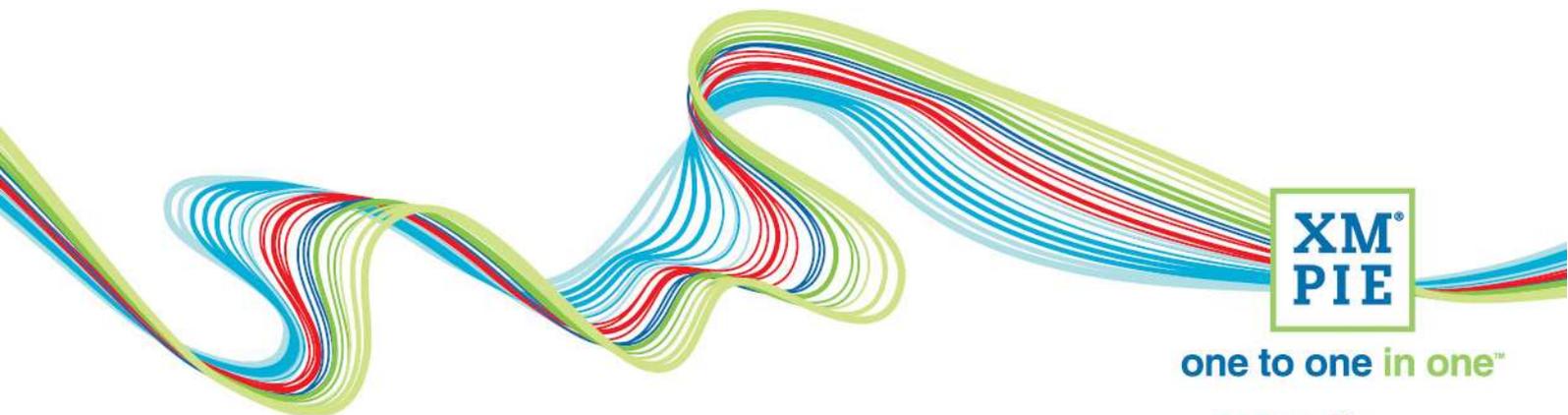
# XMPie Cross Media Training Series

## Transcript for: Circle Email Analytics Report

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one to one in one™

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## Voice over script

Hi! Welcome to XMPie PersonalEffect Cross Media.

This video introduces the Circle Email Analytics Report.

If you add an Email Touchpoint to your Circle project, after you connect the project to your uProduce, and setup the email document on the touchpoint, the Report icon will highlight.

But you can see there is no data yet because I still need to send the email out.

If I go to the report on this email, you can see some data has been captured. But our tutorial campaign is not very interesting with only a handful of recipients, so I will open one of XMPie Marketing team's projects.

This is the campaign from the 2020 XMPie Users Group conference in Dallas.

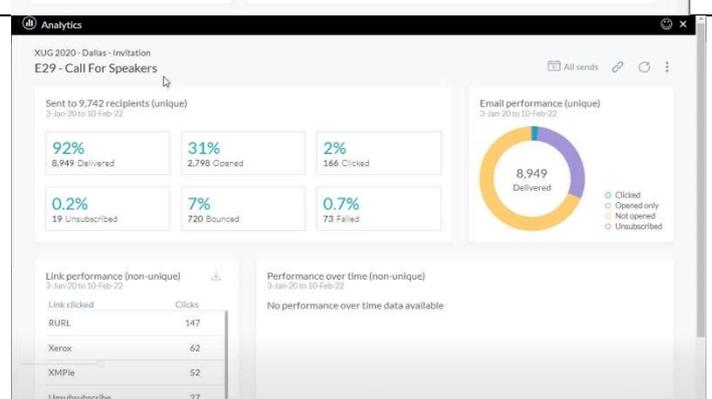
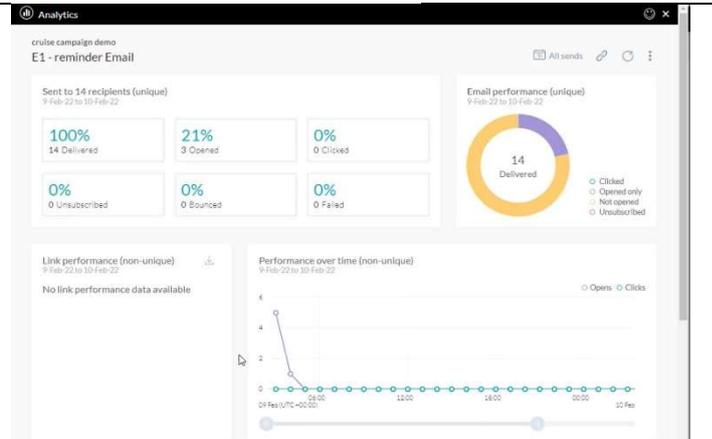
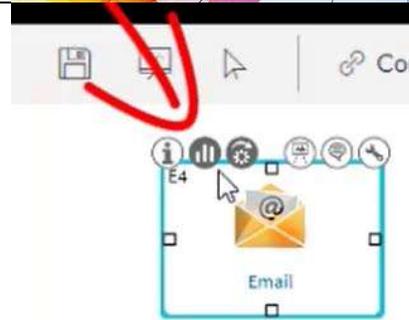
Let's take a closer look at the analytics report on this email.

At the top is the project name, the ID of the Email Touchpoint, and the touchpoint name.

You can see the number of unique recipients that were sent the email in this date range which is for all sends. I will explain the date range later in this video.

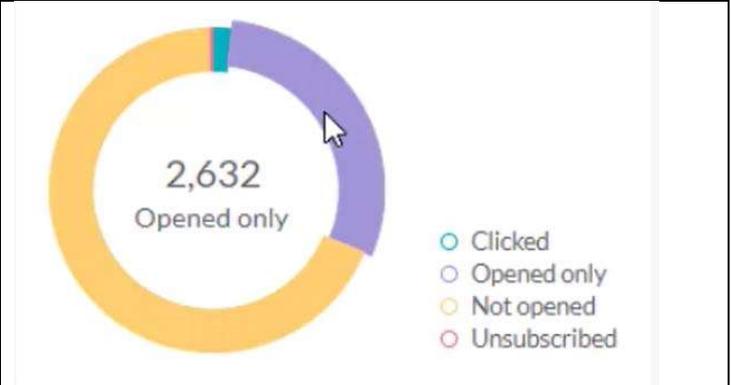
Each of these tiles shows a key metric using a unique count of recipients. To see how the percentage was calculated, simply hover the mouse over the information icon.

## Thumbnail

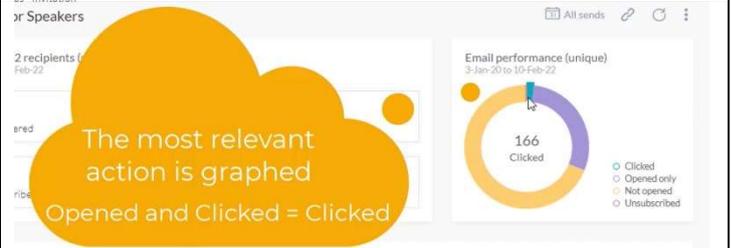


The doughnut chart provides another way to view the same key metrics.

Again, this chart is counting unique recipients, meaning that if one recipient clicked multiple links in the email, it would only count for one here, but each link click would be counted in the link performance report.



Also, in the doughnut chart, when the recipient has performed multiple actions, only the most relevant action is reported. – For example, if a recipient opened the email and clicked a link, that recipient would be counted in the Clicked group because clicking a link or button in the email shows more interest from the recipient than just opening the email.



The link performance report counts non-unique clicks for each button or link in the email. So multiple clicks by the same recipient are all counted.

The current version of Circle and XES will automatically name links in the email, but if you have any old projects before this feature was introduced, clicks of these links will be listed as unidentified.

Link performance (non-unique)  
3-Jan-20 to 10-Feb-22

Link clicked	Clicks
RURL	147
Xerox	62
XMPie	52
Unsubsubscribe	27
Unidentified links	7
ViewInBrowser	3

In addition to the automatic link naming, you can set your preferred link name on the links in your email. There is information on this here in the Cheat sheet for Email.

You can even turn off tracking for specific links if they are not relevant for your reports.

The Performance over time report for this Email Touchpoint has no information because it was sent before XES captured this type of data. I will open another project in a moment to explain this report.

**Link Tracking Name**  
Requires XES version 3.5 and above. Circle automatically assigns each link a tracking name. If you wish you may define your own tracking name in order to easily identify specific links in your email.

```
<a xmp-tracking-action="ViewInBrowser" href="{{XMPie.Email.ViewInBrowser}}">View in browser</a>
```

Link tags can include the numbers 0-9, the letters A-Z (both uppercase and lowercase, English only), hyphens (-) and underscores (\_). Spaces and special characters are not allowed.

**Disable Link Tracking**  
Requires XES version 3.5 and above. If tracking email activity is enabled, all links in the email are tracked. To prevent tracking of a specific link, add

```
<a xmp-track="1" href="{{XMPie.Email.ViewInBrowser}}">View in Browser</a>
```

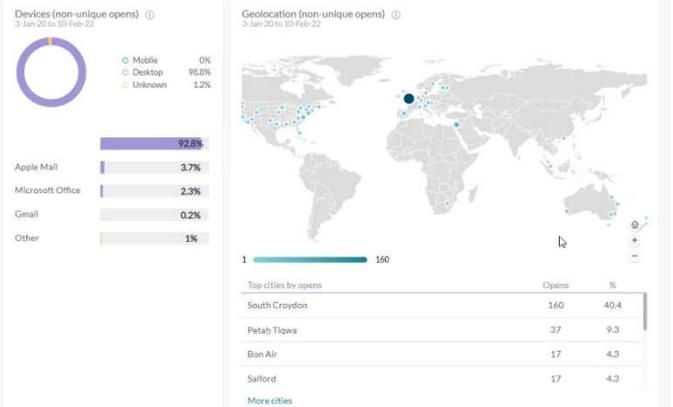
Note that "1" indicates no tracking and it is not a customizable value.

**Link source and media tracking**  
Circle Web Analytics can be used to track the source and media of links that lead customers to personalized web pages. Circle Email Touchpoints will automatically add source and media parameters that will be used for tracking. If desired, you can override the default settings. For more information, refer to the Cheat Sheet for Web.

The Devices and Geolocation reports also show some interesting information.

Devices shows the email client used by your recipients. This is helpful to ensure that you test your future emails in these clients.

Note that the device information is only provided by some email clients, so you may find a large proportion in this unknown group.



Geolocation shows the world location where the email was opened.

There are a couple things that may affect the location. Firstly, note that it is a non-unique report. So, if one recipient opens the email from home, and then later from the office, there will be two opens recorded from two different locations.

Secondly, remember that many organizations use internet proxy servers, so even though the email may be opened by staff in different office locations around the globe or around the country, all email opens from within that company will be reported from the location of the proxy server.

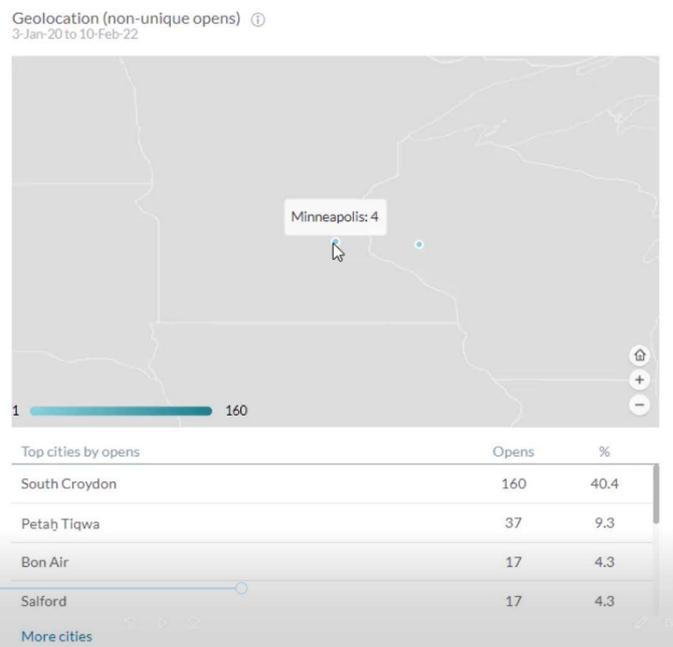
My guess here is that Xerox UK's internet proxy probably accesses the internet from South Croydon which is why there is a large figure here.



When it first loads, the Geolocation chart will automatically zoom to cover the section of the globe that shows any data points. You can use the controls on the chart to zoom and drag around. Or, click and return to the starting zoom point.

You can also click on a state or province to zoom in to that region. And hover over the city to view the number of opens for that city.

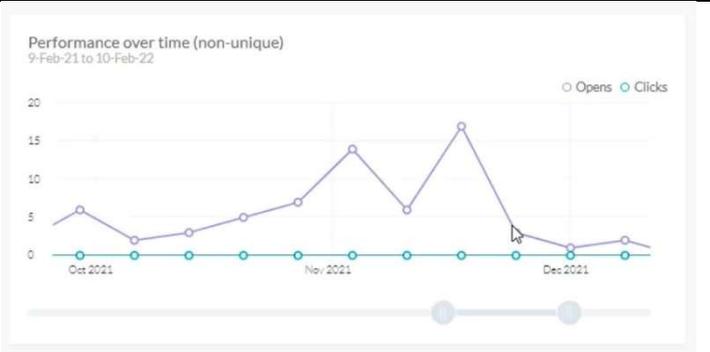
Clicking a city in the list will also zoom the map to that location.



I'll open a different project to show the Performance over time chart.

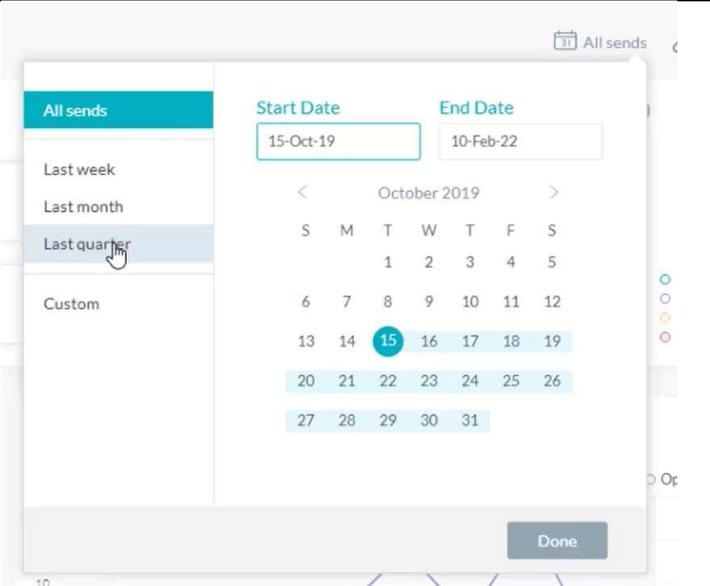
When the chart first loads, it will show the first 24 hours since this is usually when most activity will occur for a mass email. But, this email is a triggered email, so there were only 3 emails sent in the first 24 hours.

However, you can change this slider to update the display for other date ranges. This is useful when you send the email multiple times like a monthly newsletter, or for drip campaigns where scheduling and automation send the email automatically as new recipients are added to the campaign over time.



The date range for the whole report can be set by using the calendar icon. You can automatically select the last send of the email, or specific date ranges like last quarter.

If needed you can also select specific date ranges using the custom option and clicking the calendar to select start and end dates.



As we have been looking through the metrics and charts, you may have seen this download icon.

This allows you to download the list of the recipients that fall into each metric.

For example, this will download the list of recipients where the email bounced. You could use this list to clean up your recipient data.

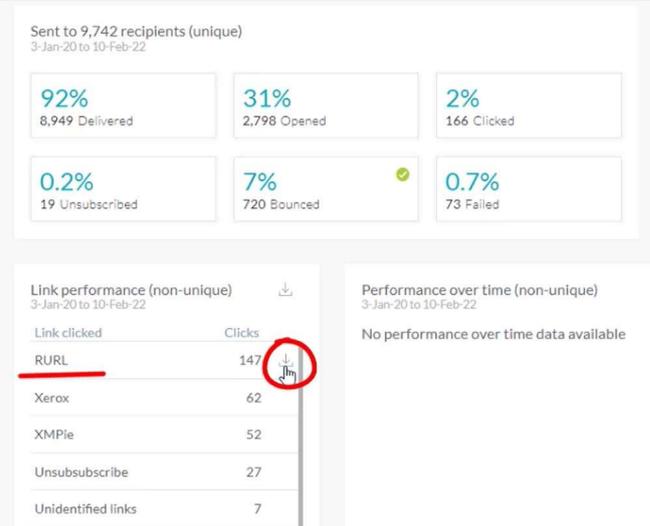
The Analytics dashboard for 'XUG 2020 - Dallas - Invitation' and 'E29 - Call For Speakers' shows performance from 3-Jan-20 to 10-Feb-22. It reports 'Sent to 9,742 recipients (unique)'. Key metrics include: 92% (8,949 Delivered), 31% (2,798 Opened), 2% (166 Clicked), 0.2% (19 Unsubscribed), 7% (720 Bounced), and 0.7% (73 Failed). A download icon is present next to the '7% Bounced' metric. Below, a 'Link performance (non-unique)' table shows clicks for 'RURL' (147) and 'Xerox' (62). A 'Performance over time (non-unique)' chart for the same period shows 'No performance over time data available'.

This download icon would download the list of recipients who clicked on the RURL link in the email.

These are your best leads since they are the ones interested enough to go and look at the website.

When the list is ready, you will be prompted to save it.

Note that the downloaded lists are also filtered by the dates you select here.



By default, each list download will contain only the recipient ID key, and any relevant information about the type of list you downloaded.

For example, the bounce list will indicate the bounce type and reason.

AutoSave: OFF

File Home Insert Draw Page Layout Formulas Data Review View

Clipboard Font Alignment

XMPieRecipientKey	Bounce type	Bounce reason
[REDACTED]	Soft Bounce	General
[REDACTED]	Hard Bounce	
[REDACTED]	Soft Bounce	General
[REDACTED]	Hard Bounce	General
[REDACTED]	Hard Bounce	General
[REDACTED]	Soft Bounce	General

It is also possible to add ADOR objects to the downloaded list.

To select ADORs to add to the list, go to the Build tab and open the Library.

On the Plan File tab, click the List icon next to the ADOR objects that you want to appear in the downloaded list.

Library

Plan File

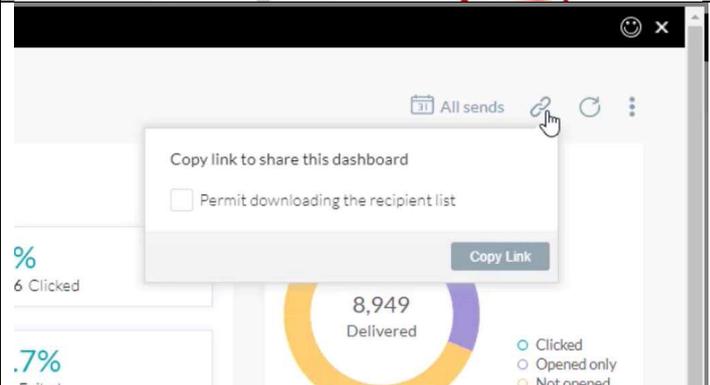
Track (27)

Type	ADOR Name	List (6)
T	First Name	[List Icon]
T	Email	[List Icon]
T	Account Name	[List Icon]
T	Company	[List Icon]
T	Country	[List Icon]
T	Mobile	[List Icon]
T	ID	[List Icon]
T	Contact ID	[List Icon]
T	Verified Name-Email	[List Icon]
T	Last Name	[List Icon]
T	Title	[List Icon]
T	Phone	[List Icon]

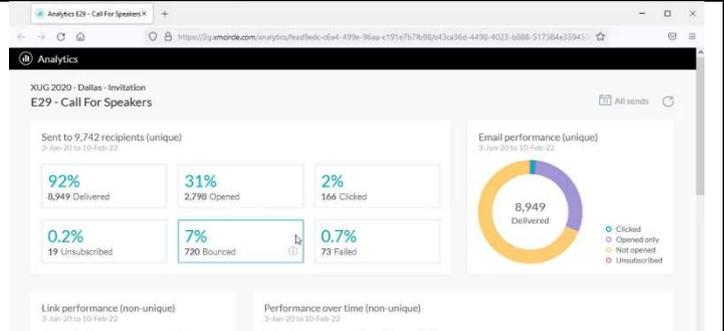
The link icon will create a link to this email touchpoint report that you can send to colleagues or customers so they can view the report without needing to login to Circle.

You have the option allow them to also download lists by checking this box if you want to enable the download icons.

Click to copy the link.



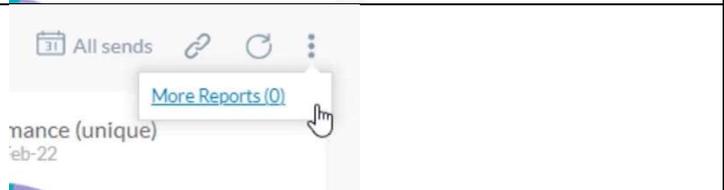
You can see this link goes directly to the report without needing to login, and in this case, does not show the list download button.



This icon will refresh the report bringing in any new event data since the report was opened.



If you have older Marketing Console reports, you can access them here. Remember that Marketing Console is deprecated and will not be supported from the end of 2022.



XMPie product managers would love to hear your comments and feedback, so this smiley icon will open an email for you to tell them more about the changes and enhancements you would like to see in future.

