

Expand your Analysis Workspace skillset.

7 tips and tricks that make creating custom analytics projects faster and easier.

Analysis Workspace is a powerful tool within Adobe Analytics that can help you create more impactful analytics projects. It has a vast feature set that allows you to do any kind of freeform analysis, but a simple user experience that makes this power and scale accessible.



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Jen Lasser is a manager on the Adobe Analytics product management team. In this role, she meets with customers to understand their business needs, using what she learns to inform the Adobe Analytics product roadmap and to prioritize new product features. Prior to her current position, Jen was a principal consultant on the Adobe Consulting team, working as a subject matter expert in data visualization, Analysis Workspace, and Report Builder.

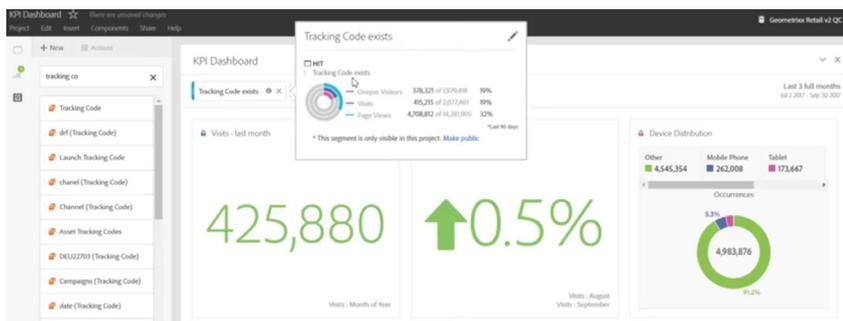
With the benefit of her real-world insight, we've curated the following tips and tricks to help make building, visualizing, and sharing your Analysis Workspace projects easier.

Build: Drilling down to the right data points.

Tip 1: Drop any dimension, date range, segment, or event into any part of your project.

Simply drag and drop a segment or any other component to the segment drop zone at the top of any panel, and you can quickly segment that panel down to certain data points. For example, you can segment your panel to show only hits where orders exist by dropping the metric "orders" into the segment drop zone. You can even segment by data that does not exist within a component (to see hits with no orders, for example) by dropping the dimension item "unspecified" or "none" in the zone.

[▶ View demonstration](#)



Try this: There is a world of efficiency waiting for you in the right-click menu. From this menu, you can access many tools and capabilities right in your Analysis Workspace workflow. When in doubt, right click to see if the tool or capability you need is close at hand.

Tip 2: Create simple metrics without leaving your workflow.

With Quick Calculated Metrics, you can create new metrics right in Analysis Workspace instead of navigating away to the Calculated Metric Builder. Just select the metric columns you want to calculate, and then, from the right-click menu, select "Create Metric From Selection." Now, you can add, subtract, divide, multiply, and more, without leaving your project and breaking your train of thought.

[▶ View demonstration](#)

Helpful hint: Up to two metric columns can be selected when using Quick Calculated Metrics. Use the Calculated Metric Builder to create metrics that include more than two metrics.

Visualize: Bringing the data within projects to life.

Tip 3: Copy and insert visualizations and panels anywhere.

Easily copy visualizations and panels from one place, and add them to another, even into a different project. That means you can easily move data around as your project grows, and share your findings with new users so they don't have to start an analysis from scratch. Simply right-click on the panel or visualization you want to copy, select "Copy Visualization," and right-click on a blank panel to insert it.

[▶ View demonstration](#)

Tip 4: Switch between time granularity visualizations in just one click.

Easily change the time view when working with trended visualizations. In previous Analysis Workspace iterations, changing time meant un hiding a source table, dragging in a new dimension, and then re-hiding the table. Now, it's as easy as selecting the time granularity you want to demonstrate right from the "Visualizations Settings" (top right gear) dropdown menu.

[▶ View demonstration](#)

Share: Making it easy for others to use and understand findings.

Tip 5: Create a custom Virtual Report Suite for specific business units.

Adobe Analytics collects vast amounts of data. Component curation in Virtual Report Suites allows admins to craft a data set for every business unit in an organization. That means analysts working in Analysis Workspace don't have to wade through data to find what matters most to them. Simply check the box titled "Enable Customization of Virtual Report Suite Components" in the Virtual Report Suites builder under "Components," and then select the components that match what a specific team measures.

[▶ View demonstration](#)

Tip 6: Link to panels and visualizations within a project, or across projects.

Create links that take audiences anywhere within Analysis Workspace. Just right-click on the panel you want to link to, select "Get Panel Link," and copy. Then highlight the text you want to link from, select the link icon in the text editor of a text box or description, and paste. To link to an entire project, simply click on the "Share" tab, select "Get Project Link," and follow the same steps as above.

[▶ View demonstration](#)

Tip 7: Save projects as reusable custom templates.

You can now easily turn any project into a custom template. Simply select "Save As Template" from the "Project" dropdown menu, add tags that make the template easy to find, and click "Save Project As Template." Now, the template will be available to all Analysis Workspace users under the "Custom Templates" tab. This allows analysts to start their projects with meaningful data points, instead of starting from square one.

[▶ View demonstration](#)

Highly-requested capability: Our customers asked us to make it easy to copy and insert visualizations and panels. Now, they spend less time recreating insights, and more time discovering new ones.

Helpful hint: You can also change the name of components within Virtual Report Suite to match the nomenclature of specific business units. Simply click on the pencil icon next to the component and type in a new name.

Helpful hint: There are several ways linking can improve your readers' experience. You can point them to illustrations that match findings and recommendations in projects. Or allow them to jump from a table of contents directly to the sections they're interested in. You can also link to other users' projects that relate to your analysis.

Highly-requested capability: Several customers asked us to make saving projects as custom templates possible. Now, this capability has become one of their favorites.

There's more valuable knowledge where this came from.

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