Measure the Results

No matter what type of communication you are sending, you'll need to determine whether it was successful. Brainshark provides powerful tracking and reporting that makes it possible to measure the success of your communications. This document details how to use and customize reports, summarizes the reports that are available in Brainshark, provides guidance for analyzing the results, and offers some best practices.

Reporting Basics

There are several reporting options to consider based on what you need to know:

- Data columns—there are many columns of data you can include in your report so you can customize it to meet your needs.
- Report delivery—you have two options:
  - You can run reports whenever you need to (on-demand)
  - You can schedule reports to be delivered to a specified email address (or addresses)
- Templates—creating templates of reports that you have customized and need to run often will save you time since you can set up the parameters and output needs in advance and run them with a few clicks of your mouse.
- Filters—customize your report with filters to add specific search parameters:
  - By employee, customer, partner
  - By viewer characteristics like state, ID number, or region
  - Other fields you have set up ahead of time in the Guestbook for your presentation

And before you worry that you need a report programmer to help you, remember, this is Brainshark! Changing reports is as easy as selecting the fields you need.

How to Access Reports in Brainshark

Reports are available while logged into the *Presentations* application.

1. Log into Brainshark.
2. On the blue navigation ribbon, select **Reporting**.

   NOTE: If Reporting is not available from the main navigation ribbon, select **My Applications** > **Presentations** to access the *Presentations* application first, then select **Reporting**.

How to Add Fields and Filters to a Brainshark Report

1. Select the report you would like to run.
2. Click the *Report Basics* tab.
3. In the *Report Contents* section, select the **Presentations** radio button, then:
   a. Click the **Find** button to locate the presentation.
   b. Select the **Folder** from the drop down to list all presentations in that folder, or enter a keyword in the **Search** field to bring up a list of all presentations which contain that keyword.
   c. Select the checkbox next to the presentation for which you would like to run the report.
   d. Click the **Submit** button.

Add Report Fields

1. Click the *Report Options* tab.
2. In the *Report columns* section, add and edit columns in your report by following these steps:
   a. Scroll down in the list of *Available columns* and select “**View User Agent**”, “**Viewer Info**”, and/or “**GB…**”
   b. Click the **right arrow** button to add the selected column to your report.
   c. Use the **up** or **down arrows** to relocate the selected column in the report.

Add Report Filters

1. Click the *Filters* tab.
2. Add Group filters as desired
    a. Only presentations authored by this group
    b. Only views by this group
3. Add Advanced filters as desired
    a. Filter column—select the column you would like to filter by
    b. Operator

=	equals whatever you have entered in *Value* field
<>	contains what you have entered in the *Value* field
Begins with	results begin with whatever you have entered in *Value* field
Contains	results contain whatever you have entered in *Value* field
Does not contain	results do not contain whatever you have entered in *Value* field

    c. Value
4. Make any additional changes to the *Dates* or *Output* section.
5. Click the **Run Report** button to run the report or save the report as a template (see *How to Save a Report Template* section below).

How to Save a Report Template

Once you have modified a report (added filters or columns), you can save the report for future use. You'll be able to run it on-demand, or schedule it to run on a regular basis.

1. After you have made changes to your report, click the *Report Basics* tab.
2. In the *When to run* section, click the **Run report** drop-down.
3. Select **Save as template** and enter a name for the report in the *Name* field.
4. In the *Report Contents* section, select the **Presentations** radio button.
5. Click the **Find** button to locate the presentation.
6. Select the **Folder** from the drop down to list all presentations in that folder, or enter a keyword in the **Search** field to bring up a list of all presentations that contain that keyword.
7. Select the checkbox next to the presentation on which you would like to run the report.
8. Click the **Submit** button.
9. Make any additional changes to the *Dates* or *Output* section and click **Save**.

How to Run Report On-Demand

Any Report in the Catalog

1. Log into Brainshark and select **Reporting** from the main navigation ribbon.
2. Select the report you would like to run.
3. In the *Report Contents* section, select the **Presentations** radio button.
4. Click the **Find** button to locate the presentation.
5. Select the **Folder** from the drop down to list all presentations in that folder, or enter a keyword in the **Search** field to bring up a list of all presentations that contain that keyword.
6. Select the checkbox next to the presentation on which you would like to run the report.
7. Click the **Submit** button.
8. Click the *Report Basics* tab.
9. In the *When to run* section, click the **Run report** drop-down.
10. Select **Now**.
11. Make any additional changes to the *Dates* or *Output* section (see *Format and Send Options* below for Reports for additional details) and click **Save**.

From a Normally Scheduled Report

1. Log into Brainshark and select **Reporting** from the main navigation ribbon.
2. On the *Things you can do* menu, select **Manage scheduled reports**.
3. From the list of *Scheduled Reports*, click the report **Name**.
4. Select **Run Now**.
5. Make any changes to the report necessary, including the *Output* or the *Date range*.
6. Click **Run report**.

From a Template

1. Log into Brainshark and select **Reporting** from the main navigation ribbon.
2. On the *Things you can do* menu, select **Manage report templates**.
3. From the list of *Report Templates*, click the report **Name**.
4. Select **Run Now**.
5. Make any changes to the report necessary, including the *Output* or the *Date range*.
6. Click **Run report**.

How to Run a Scheduled Report

Creating a Scheduled Report from a Report in the Catalog

1. Click the *Report Basics* tab.
2. In the *Report Contents* section, select the **Presentations** radio button.
3. Click the **Find** button to locate the presentation.
4. Select the **Folder** from the drop down to list all presentations in that folder, or enter a keyword in the **Search** field to bring up a list of all presentations that contain that keyword.
5. Select the checkbox next to the presentation on which you would like to run the report and click **Submit**.
6. In the *When to run* section, click the **Run report** drop-down.
7. Select the interval: **Schedule nightly**, **Schedule weekly**, or **Schedule monthly**.
8. Enter a **Name** for the scheduled report.
9. Select the **Starting** and **Repeat until** dates. The report will run at the selected interval during this time period, beginning on the starting date and ending before or on the ending date.
10. Make any additional changes to the *Dates* or *Output* section (see *Format and Send Options* below for Reports for additional details).
11. Click the **Save** button.

Creating a Scheduled Report from a Template

1. Log into Brainshark and select **Reporting** from the main navigation ribbon.
2. On the *Things you can do* menu, select **Manage report templates**.
3. From the list of *Report Templates*, click the report **Name**.
4. Select **Run Now**.
5. In the *When to run* section, click the **Run report** drop-down.
6. Select the interval: **Schedule nightly**, **Schedule weekly**, or **Schedule monthly**.
7. Enter a **Name** for the scheduled report.
8. Select the **Starting** and **Repeat until** dates. The report will run at the selected interval during this time period, beginning on the starting date and ending before or on the ending date.
9. Make any additional changes to the *Dates* or *Output* section (see *Format and Send Options* below for Reports for additional details) and click **Save**.

How to Run a Report from a Template

Run On Demand

Please refer to *How to Run a Report On-Demand from a Template* above for more information.

Edit a Template

1. Log into Brainshark and select **Reporting** from the main navigation ribbon.
2. On the *Things you can do* menu, select **Manage report templates**.
3. From the list of *Report Templates*, click the report **Name**.
4. Select **Edit template**.
5. Make any changes necessary.
6. Click **Save** to save changes.

Format and Send Options for Reports

Make changes to the Format and Send options for reports in the **Output** section on the *Report Basics* tab.

Format Options

- HTML—displays the report as an HTML web page. If you choose to display onscreen only, you will have the option to create a PDF from the report.
- Acrobat (*.PDF)—creates a PDF version of the report that can be printed or saved.
- XML—creates an XML version of the report which can be integrated into third party applications

Output Options

- On-screen only—displays the report in the selected format onscreen only. Certain formats can be then saved or printed.
- Email to—automatically sends the report to specified email addresses. The address field is pre-populated with the email address associated with the Author account you are using, however, you can change that address, or add additional addresses (separated by a comma).
- File transfer (FTP/SFTP)—directly save the report to a specific location by file transfer protocol (FTP). Once selected, you'll need to enter the details about the FTP (or SFTP) site as well as login credentials on the newly available *FTP* tab.

Reports Available in Brainshark

There are many reports available in Brainshark to help you get exactly the information you are looking for. In addition to those listed below, there are also Administration and Learning Reports. Depending on your Brainshark access level, you may or may not see all reports listed.

Presentation Reports

Presentation reports can be run to show detailed information about the presentations on your site, and allow you to analyze the usage of the presentations. Authors have access to run these reports on all content they create. Folder administrators can run these reports on content in folders for which they have rights. Company administrators will be able to run these reports on the entire site. Reports may be run for a specific presentation or an entire folder of presentations, unless otherwise specified.

Presentation Creation: Run this report to identify the presentations created in your Brainshark site. You will see the date the presentation was created, author, title, duration, total recording time, file size, number of views, viewing time, and the date last viewed. Prior to running the report, on the *Report Options* tab, you'll have the opportunity to exclude deleted, inactive, or archived presentations, combine recording times, and apply a sort based on date created or author.

Viewing Details by Presentation: This report will show you who is viewing your content (if you included a Guestbook or a login), the date and time of the view, total viewing time, total number of slides viewed, total percentage of slides viewed, total score (if examination questions were included), type of view (new or resume), and any tracking code that was included. Prior to running the report, on the *Report Options* tab, you'll have the opportunity to add or remove fields on the report, apply up to 3 sorts, or include previews (views by authors in your Brainshark site). In addition, on the *Filters* tab, you can narrow down your results by applying filters based on any field in the report or by specific groups in your Brainshark site.

USE CASE: Schedule this report to run weekly or monthly on a folder or presentation to monitor the viewing activity. Administrators can schedule this report to run for all presentations in the entire site to track overall viewing activity.

Viewing Details by Viewer: This report will show you the same information and offer the same sort, field, and view options that are available in the *Viewing Details by Presentation* report; however this report is pre-sorted by viewer information.

Viewing Summary by Presentation: This report summarizes the views for each presentation in your Brainshark site, including the author, aggregate number of views, aggregate number of slides viewed, total duration of viewing, average % completion, average % duration, and average score if examination questions were included. Prior to running the report, on the *Report Options* tab, you'll have the opportunity to apply up to 3 sorts, or include previews (views by authors in your Brainshark site). In addition, on the *Filters* tab, you can apply filters based on any field included in the report or by specific groups in your Brainshark site.

Viewing Summary by Viewer: This report summarizes viewing activity by individuals, including presentation ID, viewer information (if you included a Guestbook or a login), number of views, number of slides viewed, total duration, average % complete (based on all views by that viewer), and average score (if examination questions were included). Prior to running the report, on the *Report Options* tab, you'll have the opportunity to apply up to 3 sorts, or include previews (views by authors in your Brainshark site). In addition, on the *Filters* tab, you can apply filters based on any field included in the report or by specific groups in your Brainshark site.

Question Reports

Question reports help you to analyze the answers to questions given by your viewers. Reports may be run for a specific presentation or an entire folder of presentations, unless otherwise specified.

Grade Book: This report is intended for use with presentations that have examination questions included. It shows the % score and total points achieved by the viewer, as well as the date and time of the view, viewer information (if you included a Guestbook or a login), number of views (which will only populate if the report is sorted by viewer), viewing time, slides viewed, % duration, and total points (if examination questions were included). Prior to running the report, on the *Report Options* tab, you'll have the opportunity to apply sorting, apply filters by minimum viewing time, tracking code, or minimum score, as well as other options like including previews, row details, or a graph of the average score. In addition, you can include up to 3 additional columns of data to the report.

Question Inventory: This report will give you a list of questions and answers included in a presentation. If you run the report for a folder containing multiple presentations, the report will show the title of each presentation, followed by the questions and answers. Prior to running the report, on the *Report Options* tab, you'll have the opportunity to select whether the report will show the correct answer for each question. This report is helpful when you need a list of questions and answers included in a presentation for evaluation purposes.

Question Response Details: This report will tell you how each viewer answered examination, poll, and survey questions by listing each letter selection only. Incorrect answers will be highlighted. You'll also see the total score, date and time of the view, and viewer information if you used a guestbook. Prior to running the report, on the *Report Options* tab, you'll have the opportunity to select whether the report will show detailed responses for Examinations, Polls, or Surveys, or show previews (views by authors in your Brainshark site). In addition, on the *Filters* tab you'll be able to filter by authors or viewers in a particular group, or by specific columns. This concise report is perfect for distribution to others.

Question Results Summary: Use this report to see aggregate viewer responses to questions as well as the percentage of viewers who submitted each answer. Also included on this report is the correct answer for each question and a graphical representation of the question responses to assist you in quickly identifying those answers with the most or least responses. Prior to running the report, on the *Report Options* tab, you'll have the opportunity to exclude summary responses for Examinations, Polls, or Surveys, or show previews (views by authors in your Brainshark site). Be aware that if you exclude summary responses for all question types, the report will be blank. In addition, on the *Filters* tab you'll be able to filter by authors or viewers in a particular group, or by specific columns.

USE CASE: This report will help you gauge examination question effectiveness. Additionally, this report is helpful for use with presentations including poll or survey questions, since the graphical representation of aggregate responses will show you viewer response trends.

Viewer Transcript: This report will give you information on presentations sorted and grouped by viewer. Intended for use with presentations that include examination questions, you'll see the number of correct answers, total points, and % score in addition to date viewed, presentation title, viewing time, slides viewed, and % duration. Prior to running the report, on the *Report Options* tab, you'll have the opportunity to apply sorting, filter views by specific viewer or group, or add up to 3 additional columns to the report.

Viewing Details with Question Results: This comprehensive report combines the data shown in the Viewing Details by Presentation report with the data shown in the Question Response Details report. Each question is detailed as well as each answer, though the letter representing each answer is not shown. Prior to running the report, on the *Report Options* tab, you'll have the opportunity to add or remove fields on the report, apply up to 3 sorts, or include previews (views by authors in your Brainshark site). In addition, on the *Filters* tab, you can apply filters based on any field included in the report or by specific groups in your Brainshark site.

NOTE: Due to the detailed nature of the report, you should preview the results prior to distributing.

Viewer Clickpath Tracking Reports

Clickpath tracking provides a level of detail beyond the standard reports included with every Brainshark site. These reports are available only if you have added the Clickpath Tracking capability to your site. If you do not have access to, but would like to add, Clickpath tracking, please contact your sales representative or Brainshark Support. Reports may be run for a specific presentation or an entire folder of presentations, unless otherwise specified.

Viewer Clickpath Details: This report will show you who is viewing your content (if you included a Guestbook or a login), the date and time of the view, total viewing time, total number of slides viewed, total percentage of slides viewed, total score (if examination questions were included), type of view (new or resume, and any tracking code that was included. In addition, you'll see specific viewer activity and the duration of each activity. You'll know how much time each viewer spent on each slide. Prior to running the report, on the *Report Options* tab, you'll have the opportunity to add or remove fields on the report, apply up to 3 sorts, or include previews (views by authors in your Brainshark site). In addition, on the *Filters* tab, you can apply filters based on any field included in the report or by specific groups in your Brainshark site.

Viewer Clickpath Summary: Unlike most of the other reports available, you'll only be able to run this report for one presentation at a time. The report will show three graphs: % of Views per Slide, Average Time Viewed per Slide, and Average Audio Listened per Slide. In tabular form, you'll see the number of views, % of views, average time viewed, and average percentage listened for each slide in the presentation. Prior to running the report, on the *Report Options* tab, you'll have the opportunity to show previews (views by authors in your Brainshark site). In addition, on the *Filters* tab you'll be able to filter by authors or viewers in a particular group, or by specific columns.

Viewer Drop-off Summary: This report will show you if a password or Guestbook requirement caused viewers to close out of your presentation, the total number of views, and what percentage of those total views were affected by the drop-off. There are no options or filters available, but you can run the report for individual presentations or those in a folder on your site.

Viewing Analysis Reports

Viewing Analysis Reports provide graphs and raw data to help you identify viewing patterns and determine how effective your content is. Reports may be run for a specific presentation or an entire folder of presentations, unless otherwise specified. It will be most helpful to combine data from multiple reports to get the best picture of when a presentation should be sent and how effective it actually was. For example, you could run Views by Day of the Week and Views by Hour of the Day for a monthly communication to see when the communication should be sent during a particular month. In addition, you should run the Viewer Retention Report to see whether the communication was effective and cross reference it with the Views by Month to see if there is a trend. Perhaps it was the particular month you sent the communication and not the contents of the communication that resulted in lower views.

Viewer Retention: This report, run on a per-presentation basis only, shows a graphical representation of the percentage of views per slide. A line graph will show the viewer drop-off rate over the course of the presentation; information is also presented in a tabular format. Prior to running the report, on the *Report Options* tab, you'll have the opportunity to show previews (views by authors in your Brainshark site) or set a minimum viewing time for views included in the report.

USE CASE: What you are looking to see is a gentle downward slope to your graph, rather than a steep drop-off. This will tell you that viewers gradually exited viewing the presentation as the slides progressed. Additionally, pay attention to the % of views on critical slides, as that will give you an indication of the effectiveness of your presentation. For example, if only 5% of viewers make it past slide 2, and all are gone by slide 4, you need to take a look at the group you distributed to as well as your content in general.

Views by Day: This report will show viewing activity on specific days by presenting the date, number of views, viewing time and average viewing time in both bar graph and tabular form. Prior to running the report, on the *Report Options* tab, you'll have the opportunity to show previews (views by authors in your Brainshark site). In addition, on the *Filters* tab, you'll be able to filter by authors or viewers in a particular group, or by specific columns.

Views by Week: This report shows viewing activity summarized by week, starting on the Sunday of the week. You'll see a graphical representation of viewing by week, as well as a table showing the date, number of views, viewing time, and average viewing time. Prior to running the report, on the *Report Options* tab, you'll have the opportunity to show previews (views by authors in your Brainshark site). In addition, on the *Filters* tab, you'll be able to filter by authors or viewers in a particular group, or by specific columns.

USE CASE: This report is helpful when you want to be able to see how viewing changes from one week to the next.

Views by Day of the Week: This report shows viewing activity summarized by day, aggregated over the specified time period. You'll see a graphical representation of viewing by day, as well as a table showing the day of the week, number of views, and percentage of total views that occurred on that day. Prior to running the report, on the *Report Options* tab, you'll have the opportunity to show previews (views by authors in your Brainshark site).

USE CASE: This report will help you determine which day of the week returned the greatest number of views so you can deliver future communications on the day of the week they will be most effective.

Views by Hour of the Day: This report shows viewing activity summarized by hour of the day, aggregated over the specified time period. You'll see a graphical representation of viewing by hour of the day over a 24-hour period, as well as a table showing the hour of the day, number of views, and percentage of total views that occurred during that hour. Prior to running the report, on the *Report Options* tab, you'll have the opportunity to show previews (views by authors in your Brainshark site).

USE CASE: This report will help you determine which hour of the day returned the greatest number of views so you can deliver future communications at the time of day they will be most effective.

Views by Month of Year: This report shows viewing activity summarized by month, aggregated over the specified time period. You'll see a graphical representation of viewing by month, as well as a table showing the month, number of views, viewing time, and average viewing time that occurred during that month. Prior to running the report, on the *Report Options* tab, you'll have the opportunity to show previews (views by authors in your Brainshark site).

USE CASE: This report will help you determine which month returned the greatest number of views so you can deliver future communications during the month they will be most effective.

Analyze Your Audience

What you need to know about your viewers will help you determine the data you need in your report.

- Did you enable a Guestbook?
- Did you include custom fields in your Guestbook?
- Do you need to know who viewed your presentation from a particular area of the country?

Maybe you are new to email marketing and are not sure you even have the right audience selected. Brainshark reports can help you determine if your communication is hitting the mark….or missing the boat.

If your report results are not what you expected, return to the audience analysis you did as you were creating your communication. Maybe your audience changed or you might need to revisit your content.

Consider Your Content

Analyzing your audience is only a third of what you need to do if you are not seeing what you expected in your reports. You also need to consider your content. Reports can help you analyze your content and make improvements. Are people closing out of your presentation before it is over? This could be for several reasons, but you'll need to take a look at your content to find out why.

- Is the audio boring?
- Is the presentation too long?
- Is there a clear point being made in your communication?
- Do you demonstrate the relevance of your communication to your audience?

When you are measuring the results of your communication, it is important to keep best practices in mind.

Apply Best Practices

Keep It Simple

Use the goal you established prior to creating content to help keep your reporting simple. It is often easier to have multiple smaller reports, each targeted at one goal, than one large report with every possible field.

What are you hoping to accomplish?

- Are you trying to sell more product in California?
- Do you need to have the members of your team complete a learning requirement?
- Are you required to prove that your employees watched and certified compliance with a company or industry policy?

Check Your Settings

Understanding your communication goal will help you enable all of the features in Brainshark that you need to be able to measure whether or not you hit that goal. Go out to reports *before* you send your communication and familiarize yourself with all that is there. Run through the reporting scenario you will face after the presentation is sent. You may even want to start creating your report templates.

- Did you include Guestbook and enable the correct field types or any custom fields to get the data you need from your report?
- How about enabling Completion Criteria when you need to capture data on a viewing requirement?

Test before You Send

Before you share your presentation with the entire viewing audience, we recommend that you start by sending to a small group and then run some tests to ensure that you will get the reporting results you need. We also recognize that this isn't always possible. So, enlist the help of other Brainshark Authors. Testing views yourself, or having other Brainshark Authors help you test while you are logged into Brainshark, doesn't dilute your report results since these views are marked as 'previews' and can be excluded from reports.

Examples of How to Use Reports

Here are 3 common scenarios for the use of reports. In addition to what you see here, refer to each report description in the *Reports Available in Brainshark* section for suggested uses of each report.

Scenario 1

You need to know that John Smith viewed your presentation. To accomplish this, you've enabled the presentation guestbook. Now you need to see the Guestbook information in your reports.

Customize the report you are using and add the following fields:

- Viewer Info
- Guestbook First Name
- Guestbook Last Name
- Save your report as a template so you can continue to run it as more views come in

Scenario 2

You are the regional manager of a team and there is a learning requirement for your group. You want to report back to your manager on the progress your team is making toward the requirement.

Have the presentation author add:

- Completion Criteria to the presentation and set percentage of slide and percentage of audio the viewer needs to complete to satisfy the learning requirement. For more information on adding *Completion Criteria*, see the corresponding learning tutorial and process document.
- A dropdown guestbook field to capture viewers by team name *before* the presentation is sent out so the data is there for you when you run your reports.

Add two filters to ensure those fields are included in the output report:

- Add the 'guestbook' filter to narrow the results to just your team.
- Add the 'view is completed' filter to your report to generate results showing only those viewers who completed the viewing requirement.

When you add both filters, your results will show only those viewers who selected your team *and* also completed the viewing requirement. Just what you were looking for!

Scenario 3

You have sent several communications, but aren't sure if your content is appropriate for your audience. There are two presentations you are concerned about.

For the first presentation, the Viewing Retention report shows that people are closing your presentation after slide 4. The message you want to convey is on slide 5, so this is a problem. This report is telling you to go back and consider your content and possibly rework or omit some material. Maybe slides 1-4 are too long? Have you included enough engaging content? Ask yourself "What needs to change so that my viewers want to keep watching through to slide 5?"

For the second presentation, the Viewing Retention report tells you that viewers are dropping off after slide 2 consistently. This is telling you that you need to go back and analyze your audience. Perhaps your content is not hitting the mark. Or maybe you have sent your communication to the wrong people. Is your product, service, or message relevant to the audience you sent your communication to?