Executive Portal Help

Table of Contents

Welcome to Executive Portal 1
Getting Help 1
Drop-down Text 1
Labels and Actions 1
Help Toolbar 2
Dashboard Viewer 3
Role-based Usability 3
Dashboard Navigation 3
Using the Login Page 4
The Executive Portal Toolbar 5
Viewing Dashboards 6
Dashboard Tiles 6
Dashboard Options 6
Related Topics 6
About Score Tiles 7
Doughnut Chart View 7
Grid View 8
Pie Chart View 8
Bar Chart View 9
Grid View 9
Horizontal Variance 10
How to read the Priority Map: 11
About Open End Tiles 12
Drill-Down Data 12
About Benchmark Tiles 13
Benchmark Math 13
Benchmark Categories Selection 13
Tornado Chart 13
Bullet Graph 13
Share a Dashboard 15
Dashboard Creator 16
Role-based Usability 16
Side Navigation 16
Using the Login Page 18

The Executive Portal Toolbar 19

Working with Dashboards 20

Dashboard Tiles 20

Organizing Tiles 20

Dashboard Options 21

Related Topic: 21

Share a Dashboard 22

View Share Report and Cancel a Share 22

Related Topic: 22

Add a Dashboard 23

About the Dashboard Manager 24

Working with Scores 28

Multi Channel Summary 28

Pie Chart View 29

Grid View 29

Response Comparison 29

Score Summary 30

Trend Correlation 30

Labels 31

Time Span Correlation 31

Smoothing 32

Priority Map 33

How to read the Priority Map: 33

Data Selection 34

Settings 34

Working with Open Ends 35

Drill-Down Data 35

Working with Benchmarks 36

Benchmark Math 36

Benchmark Categories Selection 36

Tornado Chart 37

Bullet Graph 37

Date Range Selection 39

Quick Start Guides 41

Build a new Response Score Tile 42

Response Comparison 42
Additional Information 42
Next Step 42
Build a new Response Score Tile - Step 1 43
Additional Information 43
Next Step 43
Build a new Response Score Tile - Step 2 44
Additional Information 44
Next Step 44
Build a new Response Score Tile - Step 3 45
Additional Information 45
Next Step 45
Build a new Response Score Tile - Step 4 46
Next Step 46
Build a new Response Score Tile - Step 5 47
Next Step 47
Build a new Response Score Tile - Step 6 48
Next Step 48
Build a new Response Score Tile - Step 7 49
Next Step 49
Build a new Response Score Tile - Step 8 50
Additional Information 50
Next Step 50
Build a New Open Ends Tile 51
Additional Information 51
Next Step 51
Build a New Open Ends Tile - Step 1 52
Additional Information 52
Next Step 52
Build a New Open Ends Tile - Step 2 53
Additional Information 53
Next Step 53
Build a New Open Ends Tile - Step 3 54
Next Step 54
Build a New Open Ends Tile - Step 4 55

Next Step 55
Build a New Open Ends Tile - Step 5 56
Next Step 56
Build a New Open Ends Tile - Step 6 57
Next Step 57
Build a New Open Ends Tile - Step 7 58
Next Step 58
Build a New Open Ends Tile - Step 8 59
Additional Information 59
Next Step 59
Build a New Benchmark Tile - Step 1 60
Additional Information 60
Next Step 60
Build a New Benchmark Tile - Step 2 61
Next Step 61
Build a New Benchmark Tile - Step 3 62
Next Step 62
Build a New Benchmark Tile - Step 4 63
Next Step 63
Build a New Benchmark Tile - Step 5 64
Next Step 64
Build a New Benchmark Tile - Step 6 65
Additional Information 65
Next Step 65
Build a New Benchmark Tile - Step 7 66
Next Step 66
Tile Viewing Options 67
Additional Information 67
Next Step 67
Edit an Existing Tile 68
Additional Information 68
Next Step 68
Edit an Existing Tile - Step 1 69
Next Step 69
Building a New Dashboard 70

Next Step 70

Using the Pin Button 71

Next Step 71

Building a New Dashboard with Dashboard Manager 72

Additional Information 72

Next Step 72

Building a New Dashboard - Step 2 73

Next Step 73

Build a New Dashboard - Step 3 74

Next Step 74

Dashboard Setup 75

Additional Information 75

Next Step 75

Dashboard Setup - Step 1 76

Next Step 76

Dashboard Setup - Step 2 77

Additional Information 77

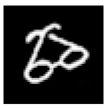
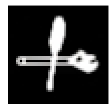
Next Step 78

Dashboard Setup - Save 79

Welcome to Executive Portal

The **Executive Portal** is a web based application designed specifically for top level management to organize and view multichannel and multi-measure information provided by **ForeSee**.

This is accomplished through customizable dashboards which present your data in a variety of interactive graphics that clearly identify important outliers for decision makers. These graphics also enable you to drill down into data with a single click.

Dashboard Viewer	Dashboard Creator
 Dashboard Viewer - The consumer or recipient of dashboards who analyzes the charts, grids, and Open Ends.	 Dashboard Creator - Develops and arranges customized tiles into dash-boards for the purpose of presenting data.

Getting Help

Summary: Information on using this **Help** feature.

Executive Portal Help may be viewed at any time during your login session by clicking ***Help*** at the top of the web page.

Drop-down Text

Some topics may show links like this:
Click to view something important...

Click the link again to close this section of text. Generally, the drop-down text feature is used for topics with several paragraphs or multiple step-by-step procedures to offer access to desired information quickly without having to scroll down the page. Drop-down text is expanded (opened) automatically when you print a topic.

Labels and Actions

As you view **Executive Portal Help** you may notice items in **bold** and ***bold-italic***. This is to help you identify **Labels**, such as a text field label, and ***Actions***, as in a graphical user interface button or link.

Help Toolbar

Executive Portal Help offers the following features at the top of the web page:

Feature	Description
FORESEE	Click the ***ForeSee*** logo to display the **ForeSee** web page in a new tab.
< >	Show or hide the left sidebar, which contains the **Table of Contents**, **Search**, and **Index** for **Help**.
Previous	Step backwards through the **Table of Contents** to view each topic in reverse order (not to be confused with the ***Back*** button of your web browser).
Next	Step through the **Table of Contents** to view each topic sequentially as you would when reading a book.
TOC	Display the **Table of Contents** in the left sidebar.
Search	Display a free-form text field in the left sidebar to enter all or part of a specific word. You can also enter word strings in quotations, e.g., *"Open Ends"*. The corresponding ***Search*** button returns all topics containing your entry. Click on each topic to view the page with your search criteria highlighted.
Index	Display a list of terms which are linked to topics containing the most descriptive information the term.
Print	Sends the current topic to your default printer. For pages with drop-down sections, all sections are expanded automatically.
Breadcrumb	Between the toolbar and topic, a breadcrumb displays with links to parent topics. **Example:** Welcome to Executive Portal > Dashboard Viewer > About the Login Page.

Dashboard Viewer

Summary: This section of **Help** contains information on:

- Viewing Dashboards
- How to Share a Dashboard

The **Dashboard Viewer** is the consumer or recipient of dashboards customized by the **Dashboard Creator**. This section of **Help** is specific to the **Dashboard Viewer** role.

Role-based Usability

Features and functionality of the **Executive Portal** are governed by each user's role settings. For example, only some users have the ability to share a dashboard. Whenever possible, these role-based features are indicated in each **Help** topic.

Dashboard Navigation

Summary: Use the circular navigation control to view available dashboards. Click within the vertical separators to display a dashboard.

The dashboard navigation feature is a permission-based, interactive control which displays below the toolbar for access to your dashboards. Each section contains the name of a specific dashboard, along with the data channel and number of tiles making up the dashboard. Click the scroll buttons on either end to page through additional dashboards.

> **TIP:** The tiles of the navigation carousel may be rearranged using the drag-and-drop method.

Using the Login Page

Summary:

- Access **Executive Portal** or **Analytics Portal**
- Change your password
- Change the language of the user interface
- Submit feedback

Executive Portal offers a secure login feature which is synchronized with the **Analytics Portal** to facilitate a single login for both environments. Your session closes automatically after 30 minutes of inactivity.

> **NOTE:** Leaving your session unattended allows anyone with access to your device to view your data. Remember to either logout of the session or lock your device while away for extended periods.

The **Login** screen allows you to select which portal to view initially. Navigating between portals is available in a single login session.

To login...

1. Select the desired portal from the menu.
2. Type your Username and password.
3. Optionally, select the desired language from the menu. You can display **Executive Portal** in the languages listed. However, **Analytics Portal** is only available in English.
4. Click ***Log in***. The **Dashboards** page displays.

> **TIP:** It is recommended to periodically change your password to maintain optimal security.

To change or reset your password...

1. Click ***Forgot password***. The **Reset Password** dialog displays.
2. Type your email address and login user name and click ***Submit***. The dialog closes and an email message is sent to the entered address with further instructions.

Other features available on the Login page include...

Feature	Description
Language Menu	Set **Executive Portal** to display in an available dialect.
Feedback	Display a pre-addressed email note to report a problem with the application or offer suggestions for future versions.

The Executive Portal Toolbar

Summary:

- Display **Help**
- Open **Advanced Analytics Portal**
- End your session

The toolbar is the page header displaying your company name and contains several controls described in the following table. The top of the toolbar displays a status bar when a page is loading, or a tile is being generated.

Element	Description
FORESEE	Click to return you the default **Dashboard** page, unless your session has timed out (which then displays the **Login** page).
Help	Click ***Help*** to display this user guide in a new browser window.
AAP	Click ***AAP*** to open **Advanced Analytics Portal** in a new browser tab.
Logout	Click ***Logout*** to end your sessions of both **Executive Portal** and **Analytics Portal** with a single click.
Username	The session owner, or the user who logged into the current session.

Viewing Dashboards

Summary: View reports based on a theme, such as cross-channel satisfaction.

A **Dashboard** is a collection of widgets called *Tiles*, which display a rating based on selected data types, such as demographics, environment, or customer satisfaction. There can be any number of tiles in a dashboard, and any number of dashboards.

To view a specific dashboard, click the dashboard name in the navigation carousel along the top of the page.

TIP: The tiles of the navigation carousel may be rearranged using the drag-and-drop method.

Dashboard Tiles

Tiles are comprised of customizable graphics, such as charts, grids, and Open Ends. The type of data displayed in a given tile originates from one of the following sources:

- Scores - A **Score** is a numeric value, ranging from zero to one hundred, which represents a specific measure.
- Benchmarks - **Benchmarks** are scores derived from other **ForeSee** clients for the purpose of comparison.
- Open Ends - **Open ends** is a category of responses comprised of narratives from respondents.

Dashboard Options

While viewing a dashboard, the following options are available:

Option	Description
[+] Expand metadata	Click the plus sign to display additional information on tile data.
Full screen	Mouse-over the tile to display this feature that allows you to view the tile full screen. The tile remains interactive to display drill-down data in the sidebar.
Share	Click to display the **Sharing** sidebar, where you can invite others to view the dashboard. See Share A Dashboard for instructions.

Related Topics

About Scores - Response scores presented as a graphic image.

About Benchmarks - Comparison of your scores against others in your industry.

About Open Ends - View comments by respondents.

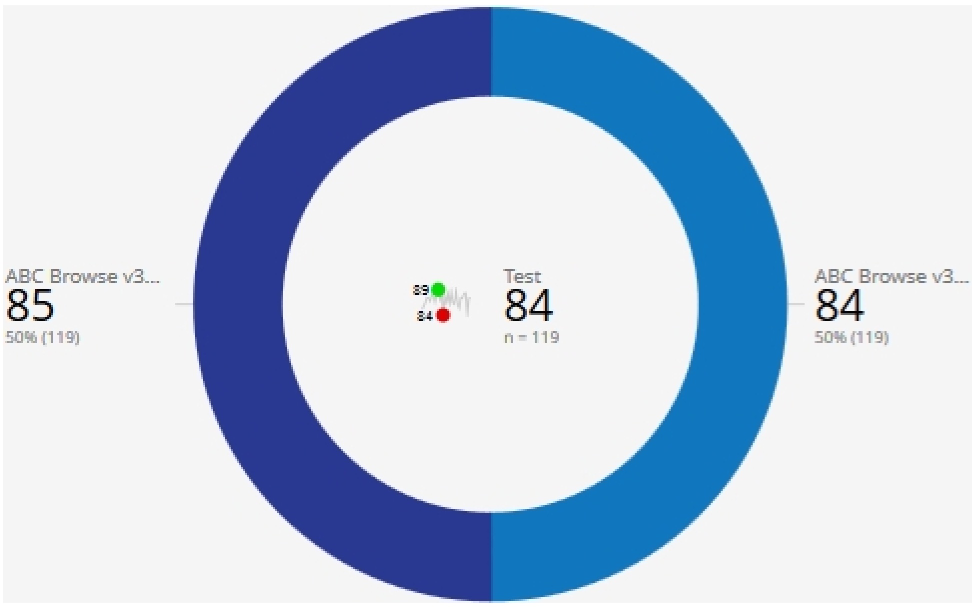
About Score Tiles

Summary: Response scores presented as a graphic image.

A **Score** is a numeric value, ranging from zero to one hundred, which represents a specific measure. **Executive Portal** offers the following types of scores:
Multi Channel Summary

This is two or more scores presented in either a doughnut chart or spreadsheet type grid. Additional information about theses scores can be displayed by clicking the ***Expand*** icon ([+]) the header.

Doughnut Chart View



> **TIP:** Mouse over chart elements to view lower number scores. When several scores have lower values the labels may be hidden. You can view these labels by positioning the cursor over each chart element.

This interactive view shows the score for each channel with a sparkline and **Combined Score** in the center. Click each of the following elements to view a drill-down of the data:

- **Channel Score Label** - Consisting of the channel, score, and n Count, this element displays the **Summary**, **Elements**, and **Future Behaviors** data which make up the measure.
- **Sparkline** - View a line chart with data points of the total score during the selected date range, along with **Summary** data consisting of **Score**, **Weight**, and **n Count**.

> **NOTE:** Sparklines of less than a 60 day duration are shown in daily increments. For periods exceeding 60 days, sparklines are shown in weekly increments.

- **Combined Score** - Consisting of the name, score, and n Count, this element displays the same information as the sparkline.

Grid View

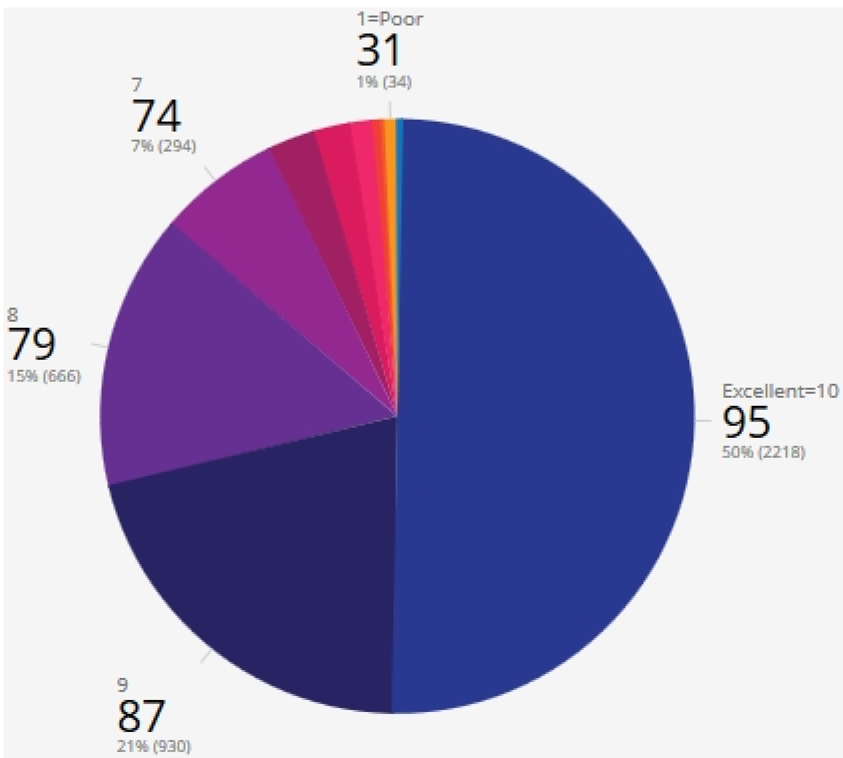
This interactive table offers the following features:

- **Combined Score** - Click the table header to view Summary data consisting of **Score**, **Weight**, and **n Count**.
- **Sort-by-column** - Click any column header to sort the data by the selected column values with the lowest value first. Click again to reverse the order.
- **Channel Score** - Click each line item to view the **Summary**, **Elements**, and **Future Behaviors** data which make up the measure.

Response Comparison

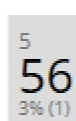
These tiles show data from a single question and specific measure. Additional information about theses scores can be displayed by clicking the ***Expand*** icon ([+]) the header.

Pie Chart View



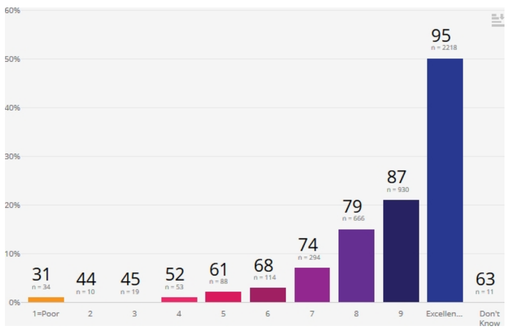
Pie charts are organized by scores, with the lowest score at the top and increasing scores progressing counterclockwise. However, you can temporarily change the sequence by selecting the desired sort order from the **Sort** menu ( ) during your session. When you leave your session, the sort order returns to the default sequence. Each section (space permitting) is labeled with the question response, score, and percent of responses (n Count). In the following image:

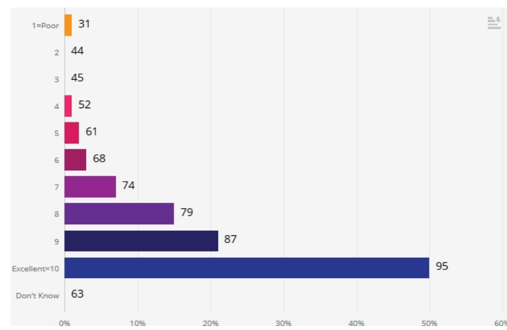
- Question response = 5
- Score = 56
- Percent of responses = 3%
- n Count = 1



When several responses have a low **n Count**, the label for each only displays when you mouse-over the pie chart section. Also, when a question response is truncated, click the label or pie section to view the entire response in the sidebar.

Bar Chart View





Vertical Bar Chart and Horizontal Bar Chart - Bar Charts are based on **n Count**, i.e., each bar's height/length represents the percentage of responses. By default, ratings are sorted by the response options for the selected **Question**, e.g., a **Question** having response options of **Yes**, **No**, and **Not Sure** shows ratings in this same sequence. However, you can temporarily change the sequence by selecting the desired sort order from the **Sort** menu ( ) during your session. When you leave your session, the sort order returns to the default sequence.

Grid View

By default, ratings are sorted by the response options for the selected **Question**, e.g., a **Question** having response options of **Yes**, **No**, and **Not Sure** shows ratings in this same sequence. However, you may sort by column heading. Click the desired column heading once to sort in descending order (highest to lowest) and twice for ascending order (lowest to highest).

Each view is interactive to display a sparkline and **Summary** data for each item clicked.

Score Summary

The **Score Summary** tile displays a numeric value of each measure to provide a quick review of any or all scores for a set time frame. Scores are organized by the categories of **Elements** (also known as the **Drivers of Satisfaction**), **Satisfaction**, and **Future Behaviors** (how a visitor is most likely to respond as a result of the experience).

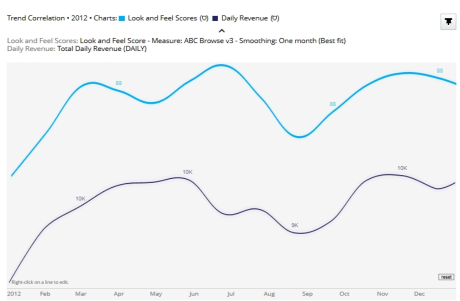
Scores are presented as a grid or individual cells, with each score displaying a sparkline in the right sidebar when selected. Grids may be temporarily sorted by column in either ascending or descending order by clicking the column header. However, the default sort order is re-applied when you log out.

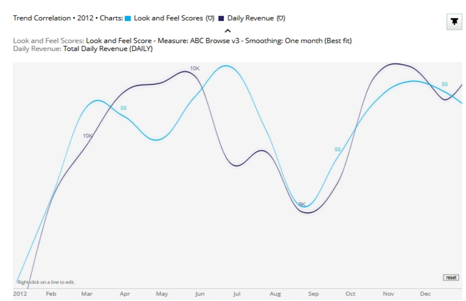
Trend Correlation

This tile consists of interactive trend lines for up to five scores to provide a visual correlation between trends. The following interactive features are available:

- Click a point on a trend line to display scores for that point/period in a sidebar.
- Right-click the trend line to display handles at the top and bottom which allow you to adjust the height of the trend line, as well as drag and drop the trend line. This allows you to stack multiple scores, or overlay them as desired (as illustrated in the following images). You may also show correlations over time (see the following section **Horizontal Variance** for additional information).

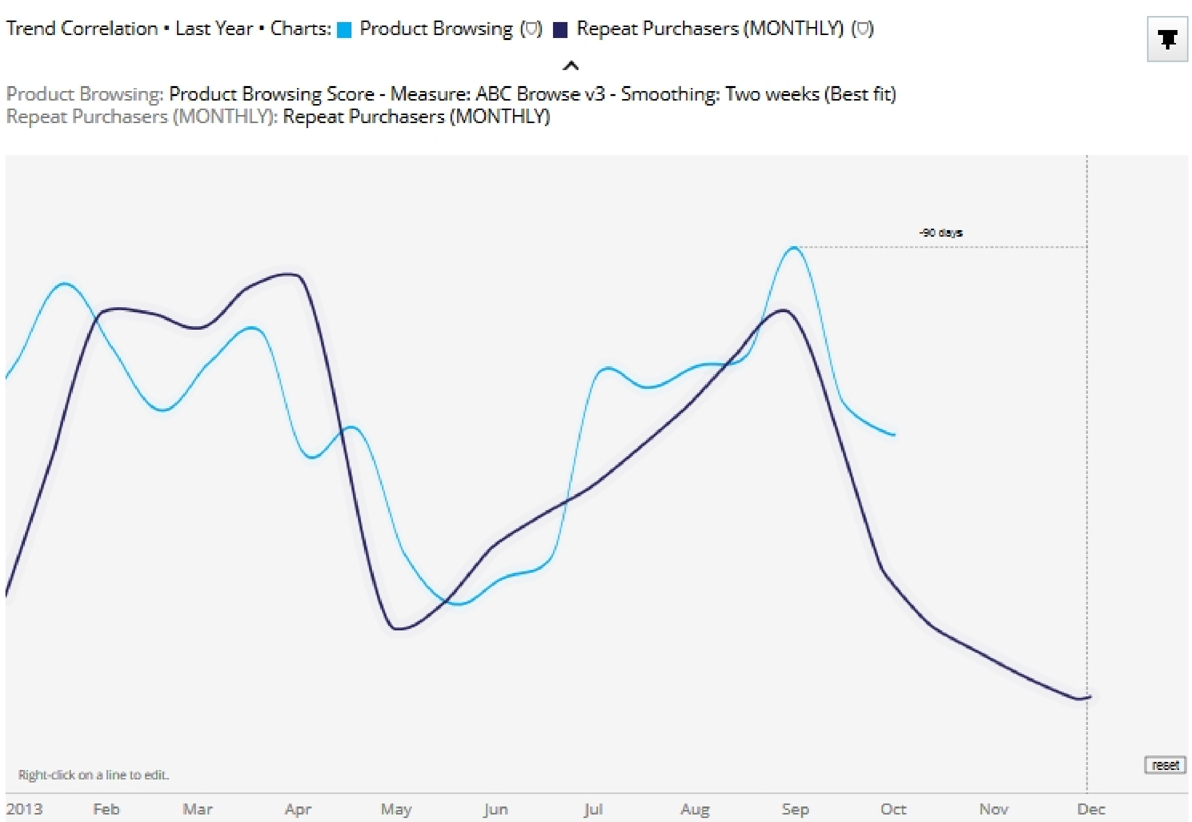
- Click ***Reset*** to view the tile with no vertical or horizontal adjustments. This is temporary when viewing on **Dashboards**, where adjustments are implemented again when you leave the dashboard.
- Click the label in the header to hide or show the line. Click the ***Data*** icon ( ) in the header for the desired trend line to hide or show markers of key points along the trend.
- A label displays when you hover over the trend line at a specific point with the score and date.





Horizontal Variance

Trend lines may be offset to show a correlation over a period of time. When a trend line is moved horizontally, the tile indicates the number of days the line has moved along the top of the trend line. The following image shows the correlation between **Product Browsing** scores and **Repeat Purchases** over a 90 day period. In this example, you can predict the impact **Product Browsing** scores will have on **Repeat Purchases** 90 days in advance.



Priority Map

The **Priority Map** tile displays a graphical representation of each **Element** in four quadrants based on **Score** and **Impact on Satisfaction**. **Impacts** are graphed on the x-axis and **Scores** are graphed on the y-axis. Each quadrant is color-coded from green to red which indicate levels of positive-to-negative results. The default display shows bubbles sized according to ***Impact*** with other options on the **Sort** menu ( ).

How to read the Priority Map:

1. Elements that reside towards the top of the chart have the highest **Scores**.
2. Elements that reside towards the right side of the chart have higher impacts. The size of the circle is proportioned to the **Impact**.
3. Top-priority elements reside in the lower right quadrant and have high **Impact** combined with low **Score**. These are the elements that are most likely to give the best return on investment for applying resources to improve **Satisfaction** and **Future Behaviors**.

Trend Correlation may be applied to indicate the direction of movement, i.e., where the measure was in relationship to where it is currently.

> **NOTE:** When trending multiple months, a note may display in the tile heading indicating there is data missing for the trending period. This is caused when one or more months has no data to report.

About Open End Tiles

Summary: View comments by respondents.

Open ends is a category of responses comprised of narratives from respondents. Tiles show **Measure** and date range in the header, with the selected **Open End Questions** and **Comment Details** of each respondent in a separate block. A response may contain up to three **Open End Questions**, up to five **Comment Details**, and the date of the response.

Drill-Down Data

Click on a response to view drill-down information on the **Open Ends Comment Review** sidebar for the individual respondent. Each respondent block is limited to 300 characters for a single comment and 150 for two or three comments. Comments exceeding this limit are collapsed and display an ***Expand*** icon ([+]). Clicking the icon displays a dialog box with the complete narrative.

About Benchmark Tiles

Summary: Comparison of your scores against others in your industry.

Benchmarks are scores derived from other **ForeSee** clients for the purpose of comparison. Benchmark tiles allow you to compare your measures against the **ForeSee** database of measures from clients. You can view who these clients are, but you cannot access a specific client's data.

Benchmark Math

Benchmark members are grouped by market venues consisting of five or more members which make up a **Category**. A **Category** score is derived from averaging the scores of its members. When a category has fewer than five members, the measure is omitted from the tile graphic and listed in the pull-down section of the tile header. For quartiles to appear in the Bullet Graph, the minimum number is 20 members. Categories with fewer members display *N/A* in the **Details** section of the sidebar (which opens when you click a category in the graph).

Benchmark Categories Selection

Data is displayed in the following interactive chart layouts which allow you to drill-down into the data for specific information. These charts are organized by score, with the lowest score at the top. However, you can temporarily change the sequence by selecting the desired sort order from the **Sort** menu ( ) during your session. When you leave your session, the sort order returns to the default sequence.

Tornado Chart

Your measure is the pivot point of this bar chart, where lower measures extend to the left and higher measures to the right. Each selected **Benchmark Category** is labeled and (when clicked) displays a summary of the category, details of how your score compares, and a list of category members. This feature requires a minimum of five members. Categories with fewer members are noted in a pull-down section of the header (indicated by a downward pointing chevron).

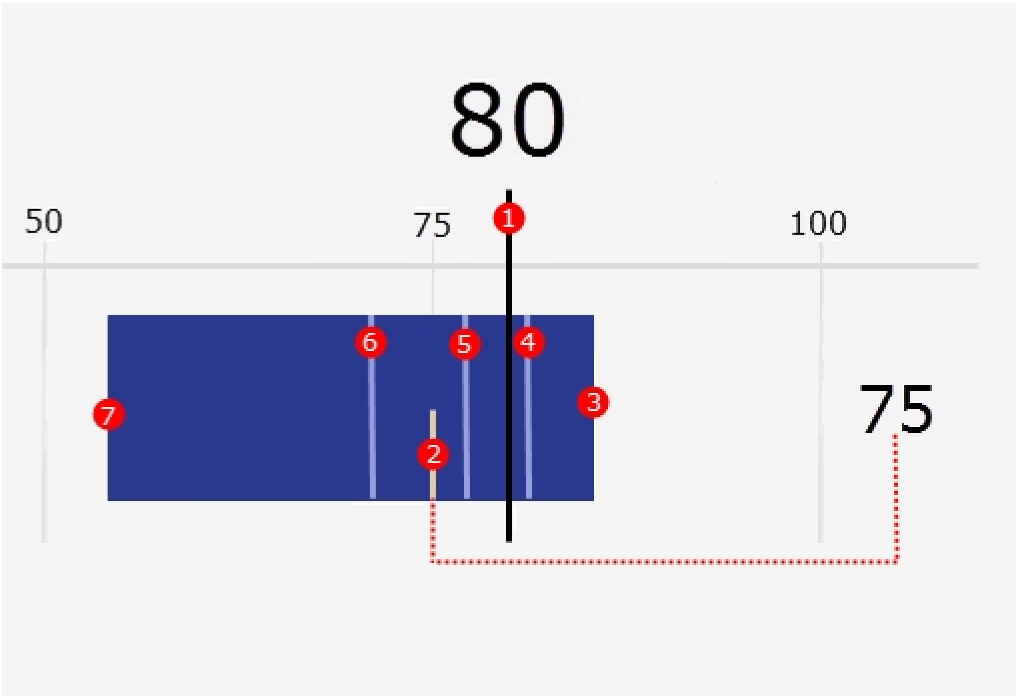
Bullet Graph

This graph has the following features:

- Your score - Displays in the top margin with a reference line to visually compare with each category.
- Categories - Each category is positioned horizontally with a label and quantitative scale. This feature requires a minimum of five members. Categories with fewer members are noted in a pull-down section of the header (indicated by a downward pointing chevron).
- Mean - The average score for each category is displayed on the right of each category and represented in the scale.
- Maximum and Minimum Ratings - Each category's highest and lowest scores.
- Quartiles - The scale represents how category members scored in quartered (25%) segments. This feature requires a minimum of 20 members.

Click anywhere along a category's label, scale, or average score to view details on a sidebar.
More about Bullet Graphs...

In **Executive Portal**, quartiles are the quartered divisions of a range to show 25th, 50th, and 75th percentiles. Using the illustration that follows, the first (lower) quartile is set at 71, which means 25% of this category's members scored below 71 with the minimum (or lowest) score of 54. Your score of 80 falls in the 50th percentile, or median of the group, which is set at 77. As previously mentioned, when you click on this scale a sidebar displays with these descriptions and values.



In this illustration:

1. Your Score = 80
2. Mean = 75
3. Maximum = 85
4. Third Quartile = 81
5. Median = 77
6. First Quartile = 71
7. Minimum = 54

Share a Dashboard

Summary: Click the ***Share*** icon () to send an email with a link for viewing a dashboard as a web page or to download a PDF image of the dashboard.

> **NOTE:** When you share a dashboard the recipient sees a virtual copy containing data which is frozen at the moment you click the ***Share*** icon. The web page version of a shared dashboard is still interactive, but the data does not change.

Role-based content: This section contains information and/or instructions requiring role-based features. If you do not see a feature described in this section, you may not have the necessary user profile to perform these tasks.

1. The ***Share*** icon floats in the lower-right corner of your browser window when you are viewing a dashboard. Click the icon to display the **Sharing** sidebar.
2. Select the desired option:
   - **Link to dashboard** - The recipient can view the dashboard as a web page. However, the data does not change from the moment you click the ***Share*** icon.
   - **Link to download PDF** - The recipient can save the dashboard as a PDF document. Each dashboard tile is placed on a separate page with all the metadata displayed, i.e., the header is expanded. However, drill-down data is not available in a PDF.
3. Select the expiration period for the dashboard.
4. (Optional) Type a password in the text field to secure the web page or PDF from unauthorized viewers. The password is not included in the email and can be communicated to a recipient as you desire.
5. Click ***Share Dashboard***. The sidebar closes and a dialog displays with two options:
   - Copy the URL - Highlight the entire string in the text box and copy (right-click the highlighted text and select ***Copy*** from the context menu, or, hold the ***Ctrl*** key down and press ***C***). You may paste the link as desired.
   - Create an email - Click ***Create Email*** and your default email application displays a note with the URL. Type the recipient's address and edit the note as desired before sending.
6. To close the dialog, click ***Cancel***.

Dashboard Creator

Summary: This section of **Help** contains information on:

- Dashboard Tiles: Scores, Benchmarks, and Open Ends
- How to Share a Dashboard

The **Dashboard Creator** develops and arranges customized tiles into dashboards for the purpose of presenting data to the Dashboard Viewer. This section of **Help** is specific to the **Dashboard Creator** role.

Role-based Usability

Features and functionality of the **Executive Portal** are governed by each user's role settings. For example, in order to move about in the system, you may see a navigation carousel along the top of a page or a navigation bar along the left side. Also, some users have the ability to share a dashboard, and some have access to the Dashboard Manager. Whenever possible, these role-based features are indicated in each **Help** topic.

Side Navigation

Summary: Use the collection of icons on the left side of the application to view or build dashboards and tiles. ***details...***

The **side navigation** is a permission-based feature which displays along the left side of the screen with icons to move from one environment to another with a single click. The primary purpose of these environments is to manage dashboards for presenting data. Each environment is described briefly in the following table with a link to additional information.

A breadcrumb displays below the toolbar as a reference of which environment and item you are viewing. For example: If you are viewing the **ABC Dashboard**, the breadcrumb displays: *Dashboards > ABC*.

Each environment offers a menu of one or more options within the environment. This menu displays next to the side navigation. A selection from the menu must be made in order to change to the selected environment.

The following table describes each element in the side navigation:

Element	Description
Show/Hide	Each environment contains a menu of options to display. Click the ***Hide*** icon ( ) to maximize your view.
Dashboards	A **Dashboard** is a collection of widgets called *Tiles*, which display a rating based on selected data types, such as demographics, environment, or customer satisfaction. See Viewing Dashboards for additional information.
Scores	A **Score** is a numeric value, ranging from zero to one hundred, which represents a specific measure. See Working With Scores for additional information.
Open Ends	**Open ends** is a category of responses comprised of narratives from respondents. See Working With Open Ends for additional information.
Benchmarks	**Benchmarks** are scores derived from other **ForeSee** clients for the purpose of comparison. See Working With Benchmarks for additional inform-

Element	Description
	ation.
Tools	This environment houses the Dashboard Manager, which allows you to build and control custom dashboards. See Add A Dashboard for additional information.

Using the Login Page

Summary:

- Access **Executive Portal** or **Analytics Portal**
- Change your password
- Change the language of the user interface
- Submit feedback

Executive Portal offers a secure login feature which is synchronized with the **Analytics Portal** to facilitate a single login for both environments. Your session closes automatically after 30 minutes of inactivity.

> **NOTE:** Leaving your session unattended allows anyone with access to your device to view your data. Remember to either logout of the session or lock your device while away for extended periods.

The **Login** screen allows you to select which portal to view initially. Navigating between portals is available in a single login session.

To login...

1. Select the desired portal from the menu.
2. Type your Username and password.
3. Optionally, select the desired language from the menu. You can display **Executive Portal** in the languages listed. However, **Analytics Portal** is only available in English.
4. Click ***Log in***. The **Dashboards** page displays.

> **TIP:** It is recommended to periodically change your password to maintain optimal security.

To change or reset your password...

1. Click ***Forgot password***. The **Reset Password** dialog displays.
2. Type your email address and login user name and click ***Submit***. The dialog closes and an email message is sent to the entered address with further instructions.

Other features available on the Login page include...

Feature	Description
Language Menu	Set **Executive Portal** to display in an available dialect.
Feedback	Display a pre-addressed email note to report a problem with the application or offer suggestions for future versions.

The Executive Portal Toolbar

Summary:

- Display **Help**
- Open **Advanced Analytics Portal**
- End your session

The toolbar is the page header displaying your company name and contains several controls described in the following table. The top of the toolbar displays a status bar when a page is loading, or a tile is being generated.

Element	Description
FORESEE	Click to return you the default **Dashboard** page, unless your session has timed out (which then displays the **Login** page).
Help	Click ***Help*** to display this user guide in a new browser window.
AAP	Click ***AAP*** to open **Advanced Analytics Portal** in a new browser tab.
Logout	Click ***Logout*** to end your sessions of both **Executive Portal** and **Analytics Portal** with a single click.
Username	The session owner, or the user who logged into the current session.

Working with Dashboards

Summary: Preview dashboards from the **Dashboard Viewer** perspective.

A **Dashboard** is a collection of widgets called *Tiles*, which display a rating based on selected data types, such as demographics, environment, or customer satisfaction. There can be any number of tiles in a dashboard, and any number of dashboards.

To view a dashboard, click the ***Dashboard*** icon ( ) on the side navigation and then click the dashboard title on the **Dashboards** sidebar. Users having access to **Tools** may also view a dashboard from the Dashboard Manager by clicking the **View** icon ( ).

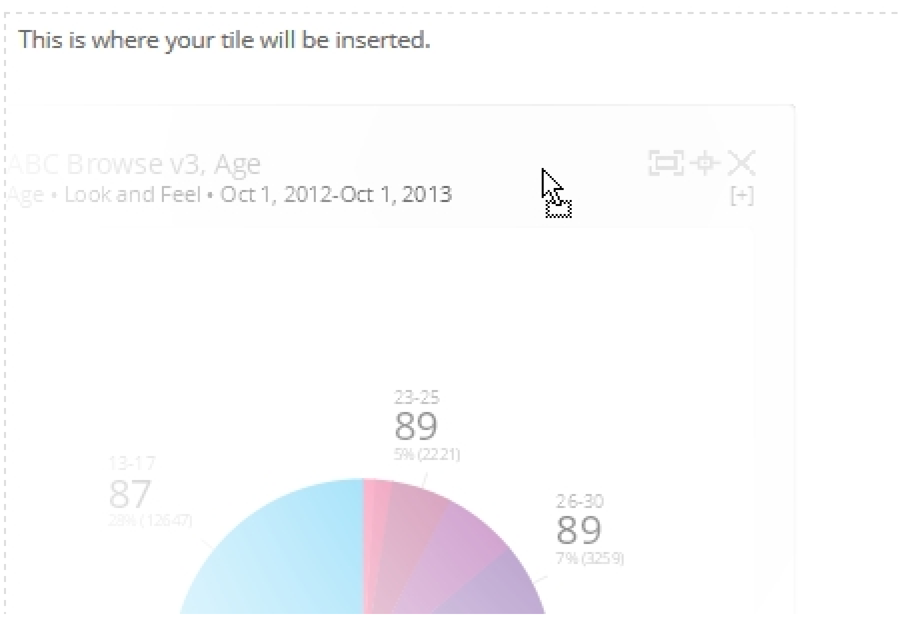
Dashboard Tiles

Tiles are comprised of customizable graphics, such as charts, grids, and Open Ends. The type of data displayed in a given tile originates from one of the following sources:

- Scores - A **Score** is a numeric value, ranging from zero to one hundred, which represents a specific measure.
- Benchmarks - **Benchmarks** are scores derived from other **ForeSee** clients for the purpose of comparison.
- Open Ends - **Open ends** is a category of responses comprised of narratives from respondents.

Organizing Tiles

Depending on your user permissions, tiles may be rearranged on the navigation carousel or the **Dashboard** by dragging and dropping each tile as desired. As a tile is dragged to a valid location, a message displays to inform you where the tile may be placed:



The new arrangement is saved automatically when you leave the page.

Dashboard Options

While viewing a dashboard, the following options are available:

Option	Description
[+] Expand metadata	Click the plus sign to display additional information on tile data. Even more metadata is available by clicking the chevron above the tile.
Full screen	Mouse-over the tile to display this feature that allows you to view the tile full screen. The tile remains interactive to display drill-down data in the sidebar.
Edit	Mouse-over the tile to display this icon, which allows you to edit the tile criteria. When clicked, the tile is displayed in the corresponding work environment (**Scores**, **Open ends**, or **Benchmarks**) where it was created.
Delete	Mouse-over the tile to display this icon, which allows you to remove the tile from the dashboard.
Share	Click to display the **Sharing** sidebar, where you can invite others to view the dashboard. See Share A Dashboard for instructions.

Related Topic:

Build A New Dashboard - Use the ***Pin*** button or **Dashboard Manager** to assign tiles to a new or existing dashboard.

Share a Dashboard

Summary: Click the ***Share*** icon (✉) to send an email with a link for viewing a dashboard as a web page or to download a PDF image of the dashboard. Use the **Dashboard Manager** to view a report on a shared dashboard, and to cancel a share.

> **NOTE:** When you share a dashboard the recipient sees a virtual copy containing data which is frozen at the moment you click the ***Share*** icon. The web page version of a shared dashboard is still interactive, but the data does not change.

Role-based content: This section contains information and/or instructions requiring role-based features. If you do not see a feature described in this section, you may not have the necessary user profile to perform these tasks.

1. The ***Share*** icon floats in the lower-right corner of your browser window when you are viewing a dashboard. Click the icon to display the **Sharing** sidebar.
2. Select the desired option:
   - **Link to dashboard** - The recipient can view the dashboard as a web page. However, the data does not change from the moment you click the ***Share*** icon.
   - **Link to download PDF** - The recipient can save the dashboard as a PDF document. Each dashboard tile is placed on a separate page with all the metadata displayed, i.e., the header is expanded. However, drill-down data is not available in a PDF.
3. Select the expiration period for the dashboard.
4. (Optional) Type a password in the text field to secure the web page or PDF from unauthorized viewers. The password is not included in the email and can be communicated to a recipient as you desire.
5. Click ***Share Dashboard***. The sidebar closes and a dialog displays with two options:
   - Copy the URL - Highlight the entire string in the text box and copy (right-click the highlighted text and select ***Copy*** from the context menu, or, hold the ***Ctrl*** key down and press ***C***). You may paste the link as desired.
   - Create an email - Click ***Create Email*** and your default email application displays a note with the URL. Type the recipient's address and edit the note as desired before sending.
6. To close the dialog, click ***Cancel***.

View Share Report and Cancel a Share

A report with details of a share is available to Dashboard Creators by viewing the dashboard properties from the **Dashboard Manager**. Go to ***Tools > Dashboard Manager***, click the dashboard name, and open the **Share** pane of the dialog box to view this report. There is also a ***Cancel Share*** button to disable the link to the web page or PDF.

Related Topic:

Dashboard Manager - View and edit dashboard properties and user privileges.

Add a Dashboard

Summary: Use the ***Pin*** button or **Dashboard Manager** to assign tiles to a new or existing dashboard.

Role-based content: This section contains information and/or instructions requiring role-based features. If you do not see a feature described in this section, you may not have the necessary user profile to perform these tasks.

A **Dashboard** is a collection of widgets called *Tiles*, which display a rating based on selected data types, such as demographics, environment, or customer satisfaction.

Each tile displays on the dashboard in the order in which it was added, e.g., the first tile added is always on the top-left of the dashboard.

There are two methods of building a new dashboard:

- Pin a tile to a new dashboard - Click the ***Pin*** button ( ) and select ***Add to new dashboard*** in the **Pin to Dashboard** dialog.
- Using the Dashboard Manager - This method allows you to setup a dashboard shell with no tiles initially. Use this method when setting up a dashboard for another owner, setting user view and edit permissions, or as a placeholder for tiles not yet selected.

About the Dashboard Manager

Summary: Go to ***Tools > Dashboard Manager*** to access information on all dashboards.

Role-based content: This section contains information and/or instructions requiring role-based features. If you do not see a feature described in this section, you may not have the necessary user profile to perform these tasks.

To view the **Dashboard Manager**, click the ***Tools*** icon ( ) on the side navigation, and select ***Dashboard Manager*** from the **Tools** sidebar. The **Dashboard Manager** page displays a list of dashboards.

The **Dashboard Manager** is a grid with a sort-by-column feature that is invoked by clicking the column heading. The grid is sorted by the selected column in ascending order. Click the heading again to reverse the order.

grid details...

Column	Description
View Dashboard	Click the **View** icon to display the dashboard. The ***Go Back*** link displays in the sidebar allowing you to close the dashboard and return to the **Dashboard Manager** grid.
Title	The descriptive label given to the dashboard when it was created.
Status	Dashboards are only viewable when *Enabled*. Disable a dashboard to take it off-line without deleting it. ***To change the Status...*** 1. Click the dashboard title on the **Dashboard Manager** grid. The **Dashboard Manager** dialog box displays. 2. By default the **General** container is expanded. Check or clear the **Enabled** check box. 3. Click ***Save***. The dialog box closes and the grid refreshes to show the **Status** for the dashboard is changed.
Tiles	The number of tiles assigned to the dashboard.
Users	The number of users having either viewing or editing permissions for the dashboard. ***To manage user assignments...*** 1. Click the dashboard title on the **Dashboard Manager** grid. The **Dashboard Manager** dialog box displays. 2. Click the **Users** title bar. The container expands. 3. Scroll through the **Users Assigned** grid and check or clear the desired **View** and **Edit** boxes. Alternatively, use the **Copy user assignments from** menu to apply the assignments of another dashboard. 4. Click ***Save***. The dialog box closes and the grid refreshes to reflect your changes in the **Users** column.
Owner	The user who has exclusive permission to delete the dashboard. The default owner is the user creating the dashboard.

<table>
<tr><th>Column</th><th>Description</th></tr>
<tr><td>Modified</td><td>A system generated date stamp of the dashboard's most recent revision.</td></tr>
<tr><td>Carousel</td><td>Use the Carousel column to establish the order in which dashboards appear on your sidebar. By default, the first dashboard loads when you login or navigate to the Dashboards page. This sequence is for your user profile only.
Best practice is to select a fast loading dashboard as #1 to avoid longer load times when you view the Dashboards page.

To change the carousel sequence...

1. Click the desired Carousel text box. When changing numbers in the middle of the sequence, only the dashboard affected by your revision are renumbered. Therefore, if you want to switch the #1 and #2 dashboards around, you only need to change #1 to #2. The current #2 is then changed automatically to #1 and the other dashboards remain unchanged. Conversely, changing the highest number to #1 causes all numbers to increase by one.
2. Press the Tab key of your keyboard to apply the change. The screen refreshes to show your revision.

You may only change one number at a time. When you click on a second text box the first revision is applied automatically.

NOTE: Users have the ability to rearrange carousel tiles and this sequence is only a default setting.</td></tr>
<tr><td>Delete</td><td>NOTE: This action results in a permanent removal of the selected dashboard. There is no recovering a deleted dashboard.

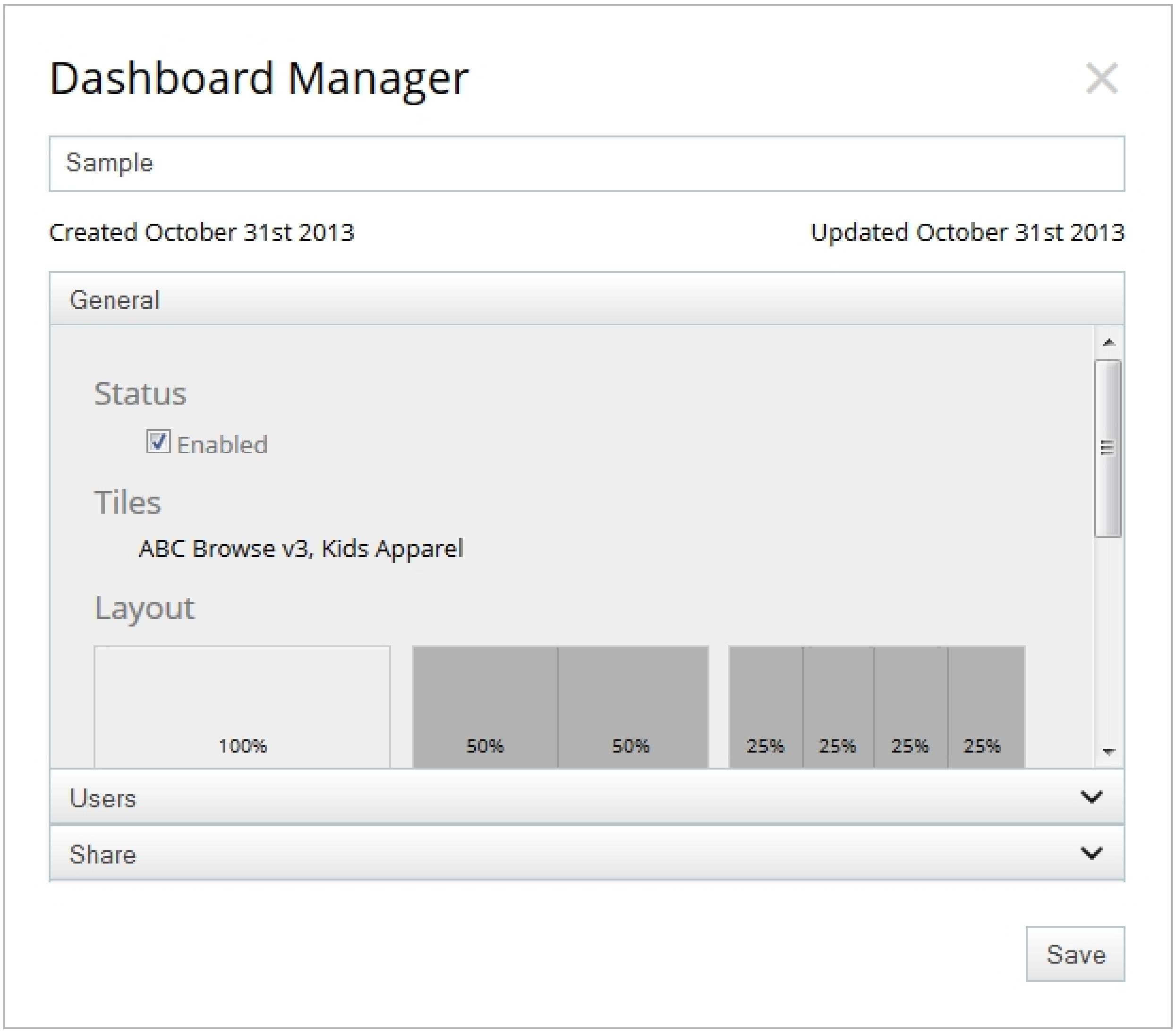
To delete a dashboard...

1. Select the check box in the Delete column for the dashboard. The Delete Dashboard(s) action displays above the grid.
2. Click Delete Dashboard(s). A dialog box displays asking you to confirm the removal of the dashboard.
3. Click OK. The dialog box closes and the screen refreshes to show the grid no longer contains the deleted dashboard.</td></tr>
</table>

More about the Dashboard Manager dialog box...

The grid contains all the dashboards you have access to along with some general information.

Click on a line item to display and revise the following dashboard details:



- General
  - Dashboard Title - A text field to edit the name of the dashboard.
  - Status - Select ***Enabled*** (default) for the dashboard to be active.
  - Tiles - A list of tiles currently assigned to the dashboard.
  - Layout - Change layout template if desired.
- Users
  - Dashboard Owner - A menu of valid users. By default, the **Dashboard Owner** has both **View** and **Edit** privileges.
  - Copy user assignments from - Apply another dashboard's User Assignments.
  - User Assignments - Select **View** and **Edit** privileges for each user.
- Share
  - Shared Reports - View the names of users who have shared the dashboard along with the date and expiration date. You may also cancel the share.

Use the Dashboard Manager to build a new dashboard...

1. Click ***Create New Dashboard***. The **Create a New Dashboard** dialog displays with several layout templates and a text field to type the name of the new dashboard.

2. Select the desired layout template, type in the **Dashboard Name** and click ***Save***. The dialog closes to display the new dashboard name on the **Dashboard Manager**.
3. (Optional) Click the new name to view and edit the dashboard properties, which include the following items:
    - Status - Enabled by default.
    - Tiles - A list of tiles currently assigned to the dashboard.
    - Layout - Change layout template if desired.
    - Dashboard Owner - A menu of valid users. By default, the **Dashboard Owner** has both **View** and **Edit** privileges.
    - User Assignments - You may copy assignments from another dashboard, or select privileges from the list.
    - Shared Reports - View the names of users who have shared the dashboard along with the date and expiration date. You may also cancel the share. Shared dashboards remain on this report for 60 days after expiration.
4. Select a desired **Tile Group** icon from the side navigation and select a list item. Tile Groups and list items include:
    - Scores - Multi Channel Summary and Response Comparison
    - Open Ends - Comment Review
    - Benchmarks - Standard Benchmarks
5. Click the ***Pin*** button () of the desired tile. The **Pin to Dashboard** dialog displays.
6. Select the desired dashboard and click ***Apply***. The dialog closes to display the tile again.

Working with Scores

Summary: Drill down into the data that comprises a **Scores** tile.

A **Score** is a numeric value, ranging from zero to one hundred, which represents a specific measure. **Executive Portal** offers the following types of scores:

- **Multi Channel Summary** - A **Combined Score** from **Analytics Portal**. You can view data in either a pie chart or spreadsheet type grid and pin it to a dashboard.
- **Response Comparison** - View data from a single question and specific measure. You can view data in a pie chart, vertical or horizontal bar chart, or spreadsheet type grid.
- **Score Summary** - A display of **Element**, **Satisfaction**, and **Future Behavior** scores for a selected measure.
- **Trend Correlation** - Interactive trend lines for measure scores.
- **Priority Map** - A bubble chart of Scores and Impact data highlighting measures which may be of concern.

The **Scores** section includes a dual purpose sidebar on the right for Data Selection and Settings.
Build A New Score Tile...

Summary: Display a **Combined Score** from **Analytics Portal**, or the scores of specific **Questions**.

Role-based content: This section contains information and/or instructions requiring role-based features. If you do not see a feature described in this section, you may not have the necessary user profile to perform these tasks.

1. On the side navigation, click the ***Scores*** icon ( ) and select the desired environment from the **Scores** sidebar.
   The page loads a default tile, which is:
   - Date range of previous day, i.e., yesterday.
   - All menus set to first item.
2. Select a date range.
3. Select criteria (see Data Selection and Settings for information on tile criteria):
   - **Multi Channel Summary** - Select an item from the **Combined Score** menu. These menu items are managed in ***Analytics Portal > Multi Measure > Combined Score***. The new tile displays.
   - For all other **Score** types:
     a. Select the desired **Channel** and **Measure**.
     b. (Optional) Click ***Add New Selection*** to incorporate another **Channel** and **Measure**.
     c. Click ***Apply*** and then click the ***Settings*** icon ( ). The **Settings** sidebar displays. For **Priority Map**, the **Settings** sidebar is used for selecting a **Trending Period**, which is optional.
     d. Select the desired menu items for each **Selection**. The new tile displays.
4. View the tile in each display option to determine how the data is best communicated. Another option is to display a chart tile along with a grid tile of the same data.

When the new tile has been generated, you can make any revisions necessary. Also, you can use the ***Pin*** button ( ) to build a new dashboard or add the tile to an existing dashboard.

Multi Channel Summary

By default, the display pane loads a tile representing the previous day's data for the first **Combined score** menu item in the **Settings** sidebar. Scores show in a pie chart with basic information in the tile header. Click the chevron above the tile to show or hide the number of **Respondents**. Select a date range and a

Combined score menu item in the **Settings** sidebar to view other summaries. Refer to **Analytics Portal Help** for additional information on combined scores. In **Analytics Portal**, click the ***Help & FAQ*** icon ( ) and go to ***Help Guides > Multi-Measure Tab > Combined Score***.
The following views are available...

Pie Chart View

> **TIP:** Mouse over chart elements to view lower number scores. When several scores have lower values the labels may be hidden. You can view these labels by positioning the cursor over each chart element.

This interactive view shows the score for each channel with a sparkline and Combined Score in the center. Click each of the following elements to view a drill-down of the data:

- Channel Score Label - Consisting of the channel, score, and n Count, this element displays the **Summary**, **Elements**, and **Future Behaviors** data which make up the measure.
- Sparkline - View a line chart with data points of the total score during the selected date range, along with **Summary** data consisting of **Score**, **Weight**, and **n Count**.

> **NOTE:** Sparklines of less than a 60 day duration are shown in daily increments. For periods exceeding 60 days, sparklines are shown in weekly increments.

- Combined Score - Consisting of the name, score, and n Count, this element displays the same information as the sparkline.

Grid View

This interactive table offers the following features:

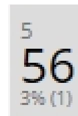
- Combined Score - Click the table header to view Summary data consisting of **Score**, **Weight**, and **n Count**.
- Sort-by-column - Click any column header to sort the data by the selected column values with the lowest value first. Click again to reverse the order.
- Channel Score - Click each line item to view the **Summary**, **Elements**, and **Future Behaviors** data which make up the measure. The **Summary** double-chevron displays the corresponding **Analytics Portal** page.

Response Comparison

Scores are compiled by a number of selected criteria from menus of the **Settings** and **Data** sidebars. By default, the display pane loads a tile representing the previous day's data for the first item of each menu. Scores show in a pie chart with basic information in the tile header. Click the chevron above the tile to show or hide additional data. Select a date range and the desired menu items in the **Data Selection** and **Settings** sidebars.
The following views are available...

- Pie Chart - Pie charts are organized by scores, with the lowest score at the top and increasing scores progressing counterclockwise. However, you can temporarily change the sequence by selecting the desired sort order from the **Sort** menu ( ) during your session. When you leave your session, the sort order returns to the default sequence. Each section (space permitting) is labeled with the question response, score, and percent of responses (n Count). In the following image:

- Question response = 5
- Score = 56
- Percent of responses = 3%
- n Count = 1



When several responses have a low **n Count**, the label for each only displays when you mouse-over the pie chart section. Also, when a question response is truncated, click the label or pie section to view the entire response in the sidebar.

- Vertical Bar Chart and Horizontal Bar Chart - Bar Charts are based on **n Count**, i.e., each bar's height/length represents the percentage of responses. By default, ratings are sorted by the response options for the selected **Question**, e.g., a **Question** having response options of **Yes**, **No**, and **Not Sure** shows ratings in this same sequence. However, you can temporarily change the sequence by selecting the desired sort order from the **Sort** menu ( ) during your session. When you leave your session, the sort order returns to the default sequence.
- Grid - By default, ratings are sorted by the response options for the selected **Question**, e.g., a **Question** having response options of **Yes**, **No**, and **Not Sure** shows ratings in this same sequence. However, you may sort by column heading. Click the desired column heading once to sort in descending order (highest to lowest) and twice for ascending order (lowest to highest).

Each view is interactive to display a sparkline and **Summary** data for each item clicked.

Score Summary

The **Score Summary** tile displays a numeric value of each measure to provide a quick review of any or all scores for a selected time frame. Scores are organized by the categories of **Elements** (also known as the **Drivers of Satisfaction**), **Satisfaction**, and **Future Behaviors** (how a visitor is most likely to respond as a result of the experience).

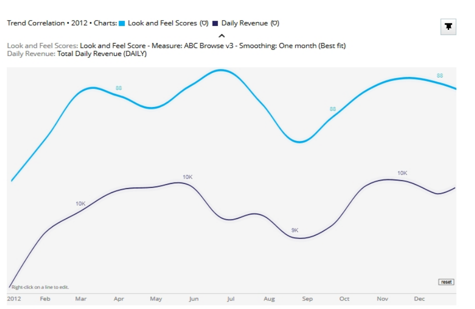
Scores display as grids ( ) or individual cells ( ). Each score displays a sparkline on the right sidebar when selected. Grids may be sorted by column in either ascending or descending order by clicking the column header.

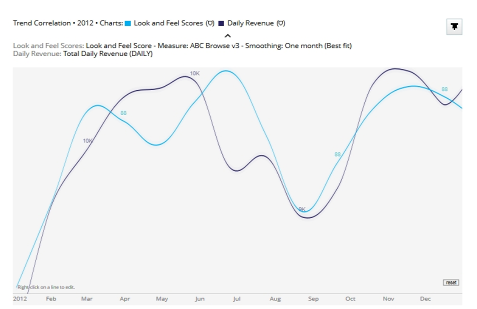
You can display multiple **Selection** tiles with scores for various **Channel**+**Measure** combinations. You can also apply any filters available from **Analytics Portal**. Each **Selection** tile may be displayed in either a grid or cells. When the new tile has been generated, you can make any revisions necessary. Also, you can use the ***Pin*** button ( ) to build a new dashboard or add the tile to an existing dashboard.

Trend Correlation

This tile consists of interactive trend lines for up to five scores to provide a visual correlation between trends. The following interactive features are available:

- Click a point on a trend line to display scores for that point/period in a sidebar.
- Right-click the trend line to display handles at the top and bottom which allow you to adjust the height of the trend line, as well as drag and drop the trend line. This allows you to stack multiple scores, or overlay them as desired (as illustrated in the following images). You may also show correlations over time (see the following section **Horizontal Variance** for additional information).
- Click ***Reset*** to view the tile with no vertical or horizontal adjustments. This is temporary when viewing on **Dashboards**, where adjustments are implemented again when you leave the dashboard.
- Click the label in the header to hide or show the line. Click the ***Data*** icon ( ) in the header for the desired trend line to hide or show markers of key points along the trend.
- A label displays when you hover over the trend line at a specific point with the score and date.





More about Trend Correlation Tiles...

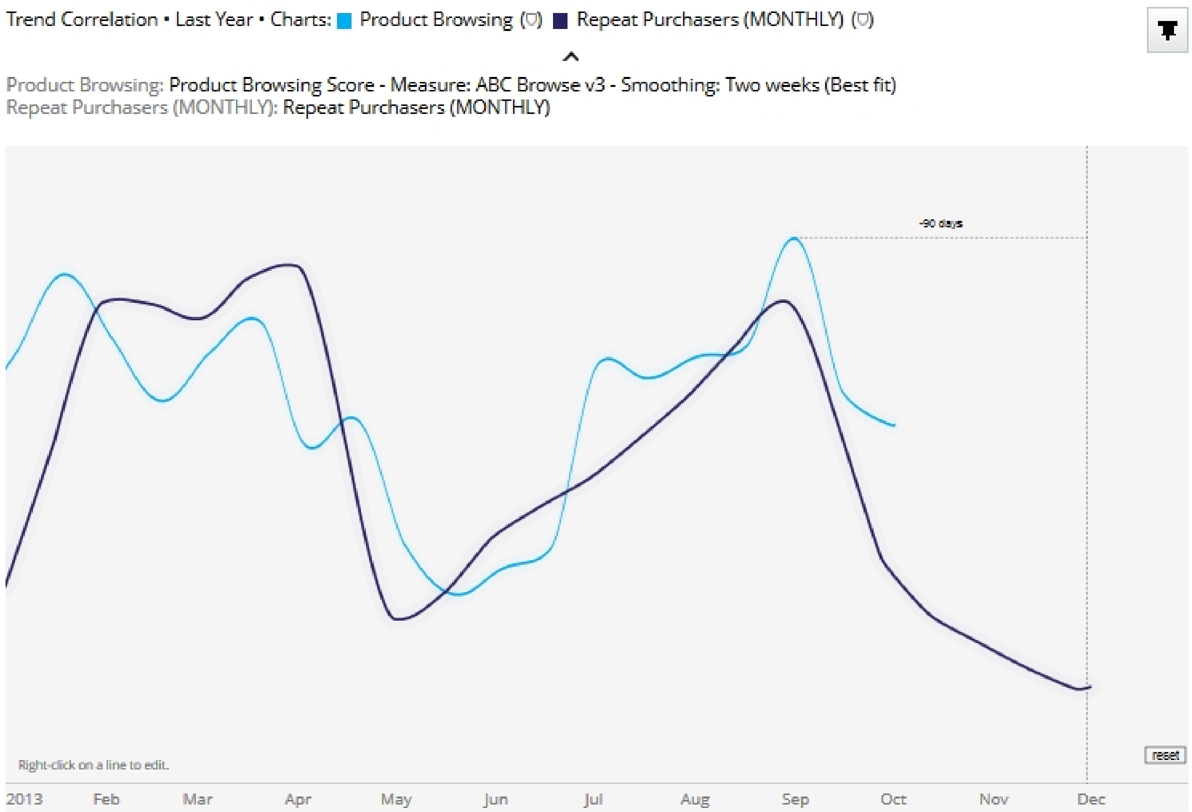
Labels

The **Settings** sidebar offers a **Label** text field that defaults to the selected **Measure**, but can be revised as desired. This label displays in the tile header with the color key for the trend line. Click the label in the header to hide or show the line. Click the ***Data*** icon ( ) in the header to hide or show markers of key points along the trend.

Additionally, a label displays when you hover over the trend line at a specific point with the score and date.

Time Span Correlation

The following image shows the correlation between **Product Browsing** scores and the corporate metric for **Repeat Purchases** over a 90 day period. When a trend line is moved horizontally, the tile indicates the number of days the line has moved along the top of the trend line.

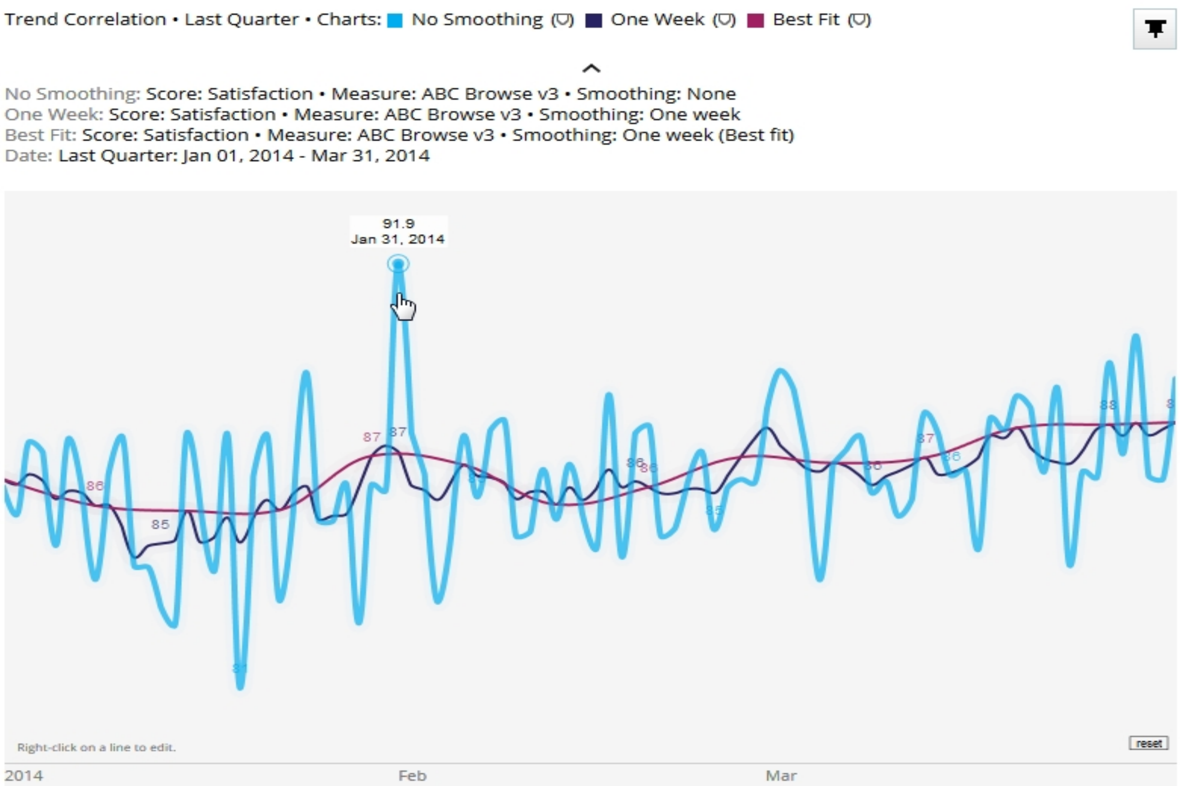


Smoothing

You can also apply **Smoothing** to a trend line to compress, or lessen the severity of changes. The **Smoothing** feature averages scores across the time span you select.

The **Smoothing** feature allows you to reduce the severity of the trend line between highs and lows. You can select the level of smoothing in the **Settings** sidebar ( ). In the following image, the darker trend line has ***One Week*** applied to a **Last Quarter** report. The system has averaged each day's **Satisfaction** score with the scores of the preceding and succeeding three days. A ***Two weeks*** application would average each score with scores of the seven days before and seven days after, etc.

Best Fit then takes the **Smoothing** value for each time interval you specify and ignores the data points in between. For example, in the following image the **One Week** value, or data point for **February** is *87* and three weeks later is *86*. The **Best Fit** data points match these values, but the trend line shows less variation because there is only one data point for each week. Likewise, **One Month (Best fit)** has a single data point for the entire month compared to a data point for each day of the month.



Priority Map

The **Priority Map** tile displays a graphical representation of each **Element** in four quadrants based on **Score** and **Impact on Satisfaction**. **Impacts** are graphed on the x-axis and **Scores** are graphed on the y-axis. Each quadrant is color-coded from green to red which indicate levels of positive-to-negative results. The default display shows bubbles sized according to ***Impact*** with other options on the **Sort** menu ( ).

How to read the Priority Map:

1. Elements that reside towards the top of the chart have the highest **Scores**.
2. Elements that reside towards the right side of the chart have higher impacts. The size of the circle is proportioned to the **Impact**.
3. Top-priority elements reside in the lower right quadrant and have high **Impact** combined with low **Score**. These are the elements that are most likely to give the best return on investment for applying resources to improve **Satisfaction** and **Future Behaviors**.

These tiles are generated by choosing a **Day** or **Month** option (see Date Range Selection) and **Data Selection** items.

> **TIP:** Depending on the screen resolution of your display, the **Data Selection** sidebar may need to be closed in order to view the data point columns.

Trend Correlation may be applied from the **Stgs** sidebar. Trend lines indicate the direction each measure has taken during the time period with the bubble representing the current data point.

> **NOTE:** When trending multiple months, a note may display in the tile heading indicating there is data missing for the trending period. This is caused when one or more months has no data to report.

Data Selection

This sidebar offers **Channel** and **Measure** menus, with the possibility of filter menus based on your selections. Each selection displays a separate tile for comparison. When you add a **Selection**, a new set of **Settings** display.

Some combinations offer filters which exist in **Analytics Portal** and may be applied if desired. The double-chevron link opens the **Filters** page of **Analytics Portal** to edit existing filters, or build a new filter.

Settings

With the exception of **Priority Map**, each **Data Selection Measure** has a corresponding set of menus to select **Question** and **Score**. With **Priority Map** the **Settings** sidebar offers **Trending Periods**.

Working with Open Ends

Summary: View comments for a specific **Channel** and **Measure**, along with **Elements**, **Satisfaction Score**, and **Future Behaviors** for a single response.

Open ends is a category of responses comprised of narratives from respondents. Tiles show **Measure** and date range in the header, with the selected **Open End Questions** and **Comment Details** of each respondent in a separate block. A response may contain up to three **Open End Questions**, up to five **Comment Details**, and the date of the response.

Build A New Open Ends Tile...

Summary: Use **Open End Questions** and **Comment Details** for selected **Channels** and **Measures** to build a tile.

Role-based content: This section contains information and/or instructions requiring role-based features. If you do not see a feature described in this section, you may not have the necessary user profile to perform these tasks.

To display comments:

1. Select a date range.
2. The **Data Selection** sidebar displays by default with the **Channel** and **Measure** menus set to the first item. Select the desired **Channel** and **Measure** items. For some measures, one or more filter menus may appear.
3. (Optional) Select any desired filter criteria. You may also click ***Add New Selection*** to incorporate another channel, measure, and/or filter(s).
4. Click ***Apply***, which then becomes disabled until you perform any revisions.
5. Click the ***Settings*** icon ( ). The **Settings** sidebar displays each selection separately with a search text field and a checklist of short question labels grouped by **Open End Questions** and **Comment Details**.
6. (Optional) Type a key word or regular expression in the search text field to view responses containing only the key word.
7. Select up to three **Open End Questions**, up to five **Comment Details**, and two **Scores**. Each section becomes disabled when you reach the maximum allowed selections.
8. Click ***Apply***. A progress bar displays along the top of the toolbar while the system generates and displays the tile.

With the comments displayed, you may change your selections, click ***Pin*** ( ) to add the tile to a dashboard, or click a comment to view additional information in a sidebar.

Drill-Down Data

Click on a response to view drill-down information on the **Open Ends Comment Review** sidebar for the individual respondent. Each respondent block is limited to 300 characters for a single comment and 150 for two or three comments. Comments exceeding this limit are collapsed and display and expand icon ([+]). Clicking the icon displays a dialog box with the complete narrative.

Working with Benchmarks

Summary: Use the score averages of selected market categories to compare with your own.

Benchmarks are scores derived from other **ForeSee** clients for the purpose of comparison. Benchmark tiles allow you to compare your measures against the **ForeSee** database of measures from clients. You can view who these clients are, but you cannot access a specific client's data.

Benchmark Math

Benchmark members are grouped by market venues consisting of five or more members which make up a **Category**. A **Category** score is derived from averaging the scores of its members. When a category has fewer than five members, the measure is omitted from the tile graphic and listed in the pull-down section of the tile header. For quartiles to appear in the Bullet Graph, the minimum number is 20 members. Categories with fewer members display *N/A* in the **Details** section of the sidebar (which opens when you click a category in the graph).

Build A New Benchmark Tile...

Summary: Select various benchmark category scores for selected **Channels** and **Measures**.

Role-based content: This section contains information and/or instructions requiring role-based features. If you do not see a feature described in this section, you may not have the necessary user profile to perform these tasks.

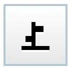
1. On the side navigation, click the ***Benchmarks*** icon ( ), then ***Standard Benchmarks*** from the **Benchmarks** sidebar.
2. Select a date range.
3. Select the desired **Channel** and **Measure**.
4. (Optional) Click ***Add New Selection*** to incorporate another **Channel** and **Measure**.
5. Click ***Apply*** and then click the ***Settings*** icon ( ). The **Settings** sidebar displays. The **Settings** sidebar displays with any **Benchmark Categories** your company belongs to selected. See Benchmark Categories Selection for additional information on category members.
6. Select the desired **Benchmark Score**. The screen refreshes to show corresponding **Benchmark Categories**.
7. Select up to 15 **Benchmark Categories**. The list is disabled when you select the maximum.
8. Click ***Apply***. A progress bar displays along the top of the toolbar while the system generates and displays the tile.
9. View the tile in each display option to determine how the data is best communicated. Another option is to display a chart tile along with a grid tile of the same data.

When the new tile has been generated, you can make any revisions necessary. Also, you can use the ***Pin*** button ( ) to build a new dashboard or add the tile to an existing dashboard.

Benchmark Categories Selection

The **Settings** sidebar contains a list of groups with check boxes for you to include in your tile. Each of these groups, or categories has a corresponding ***Information*** icon ( ) to open a dialog listing the category's members. You may select up to 15 categories to be included in the tile. Categories your company belongs to are automatically selected.

Data is displayed in interactive charts which allow you to drill-down into the data for specific information.

Tornado Chart 

Your measure is the pivot point of this bar chart, where lower measures extend to the left and higher measures to the right. Each selected **Benchmark Category** is labeled and (when clicked) displays a summary of the category, details of how your score compares, and a list of category members. This feature requires a minimum of five members. Categories with fewer members are noted in a pull-down section of the header (indicated by a downward pointing chevron).

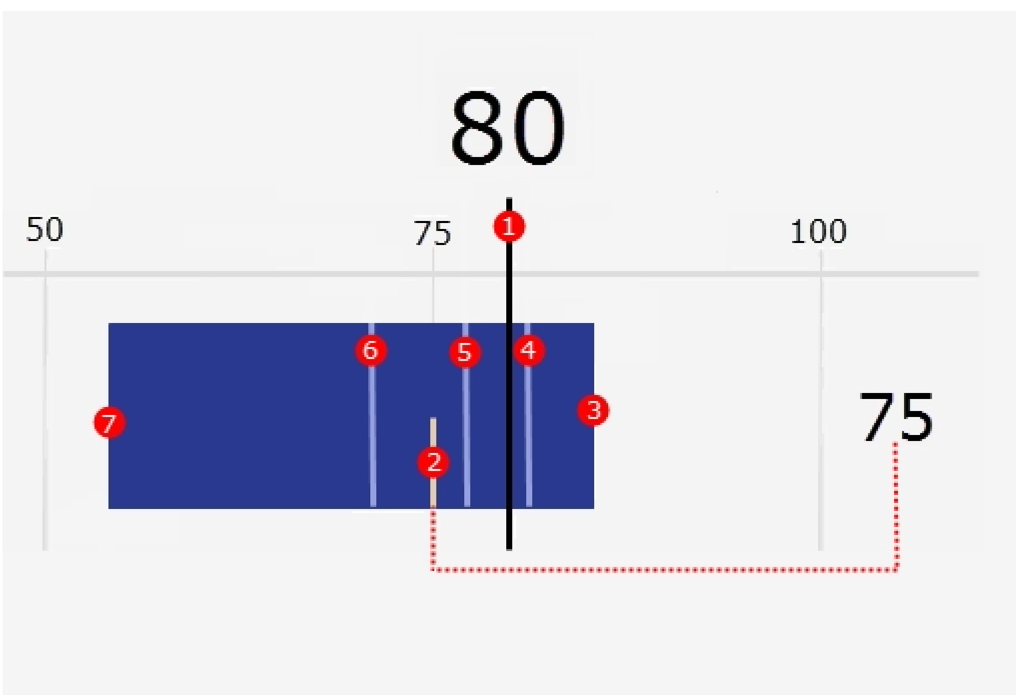
Bullet Graph 

This graph has the following features:

- Your score - Displays in the top margin with a reference line to visually compare with each category.
- Categories - Each category is positioned horizontally with a label and quantitative scale. This feature requires a minimum of five members. Categories with fewer members are noted in a pull-down section of the header (indicated by a downward pointing chevron).
- Mean - The average score for each category is displayed on the right of each category and represented in the scale.
- Maximum and Minimum Ratings - Each category's highest and lowest scores.
- Quartiles - The scale represents how category members scored in quartered (25%) segments. This feature requires a minimum of 20 members.

Click anywhere along a category's label, scale, or average score to view details on a sidebar.
More about Bullet Graphs...

In **Executive Portal**, quartiles are the quartered divisions of a range to show 25th, 50th, and 75th percentiles. Using the illustration that follows, the first (lower) quartile is set at 71, which means 25% of this category's members scored below 71 with the minimum (or lowest) score of 54. Your score of 80 falls in the 50th percentile, or median of the group, which is set at 77. As previously mentioned, when you click on this scale a sidebar displays with these descriptions and values.



In this illustration:

1. Your Score = 80
2. Mean = 75
3. Maximum = 85
4. Third Quartile = 81
5. Median = 77
6. First Quartile = 71
7. Minimum = 54

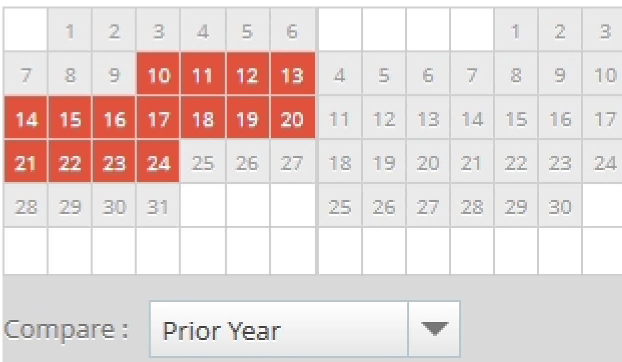
Date Range Selection

Summary: Use the date range pull-down feature to set the start and end dates for a tile and to display a comparison of two date ranges.

Selecting the date range for a tile is performed with a pull-down dialog below the toolbar and can be identified by the default date range of the previous date, i.e., yesterday. The dialog defaults to the **Custom** tab. However, you can change this default in the **Settings** tab (see the following section **Date Range Descriptions** for details on each tab.

Compare...

Each tab has a **Compare** menu to display a side-by-side comparison of the date range and the compare date range. For example: Compare a two-week period with the prior year.



The menu offers different options for each tab. When a chart or grid is generated, the date range and compare range values display side-by-side with a color code key in the tile header.

Date Range Descriptions...

The following table describes each tab of the dialog in detail:

Tab	Description
Custom	**Custom** offers the following options: • Text boxes to type in **Start** and **End** dates. • A calendar showing the current and two subsequent months. You can click a start date and click an end date, or drag from one date to the other. You may also drag to a date which is not displayed by dragging over the side of the calendar container to a previous or subsequent month. The **Compare** menu displays a side-by-side comparison of the date range and the compare date range. For example: Compare a two-week period with the prior year.
Year	**Year** offers date range options by years according to the selected calendar*. With the exception of **Select year**, these tiles update automatically at the start of a new year.
Quarter	**Quarter** offers date range options by three-month periods according to the selected calendar*. With the exception of **Select quarter**, these tiles update automatically at the start of a new quarter.

Tab	Description
Month	**Month** offers date range options by month according to the selected calendar*. With the exception of **Select month**, these tiles update automatically at the start of a new month.
Week	**Week** offers date range options by seven day periods** according to the selected calendar*. With the exception of **Select week**, these tiles update automatically at the start of a new week.
Day	**Day** offers date range options by 24 hour periods beginning and ending at 12:00 AM. With the exception of **Select day**, these tiles update automatically each day.
⚙ Settings	The following settings are available: • *__Calendar__ - The Gregorian calendar is the default setting. Custom calendars, such as fiscal or model year calendar, are available upon request. • **__Week starts__ - Shows the first day of the week as determined by the selected calendar. • **Default view** - Set the default tab, i.e., which tab shows when you pull down the dialog.
Actions	The following actions are available: • ***Cancel*** - Closes the dialog without changes to the date range. • ***Apply*** - Implements the selected date range and closes the dialog.

Quick Start Guides

This section of **Help** is comprised of illustrated tutorials on the more basic tasked performed in **Executive Portal**. The following **Quick Start Guides** are available:

- Build a New Response Comparison Score Tile
- Build a New Benchmark Tile
- Build a New Open Ends Tile
- Edit an Existing Tile
- Build a New Dashboard
- Dashboard Setup

Build a new Response Score Tile

Response Comparison

View data from a single question and specific measure. You can view data in a pie chart, vertical or horizontal bar chart, or spreadsheet type grid.

Additional Information

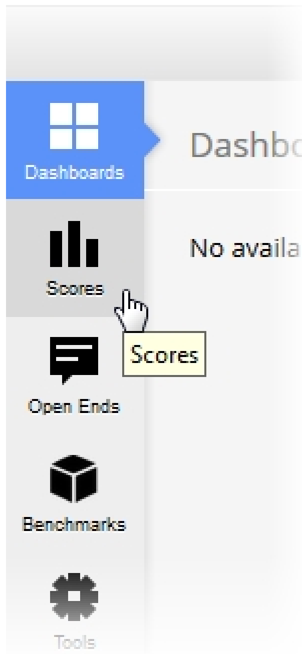
[Working with Scores]

Next Step

[Step 1 >]

Build a new Response Score Tile - Step 1

On the side navigation, click the ***Scores*** icon ( ) and select the desired environment from the **Scores** sidebar.



Additional Information

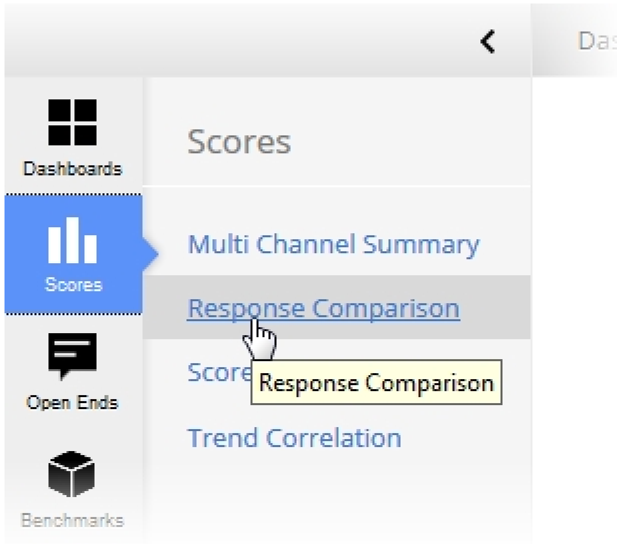
[Side Navigation]

Next Step

[Step 2 >]

Build a new Response Score Tile - Step 2

Click ***Response Comparison*** on the **Scores** sidebar.



Additional Information

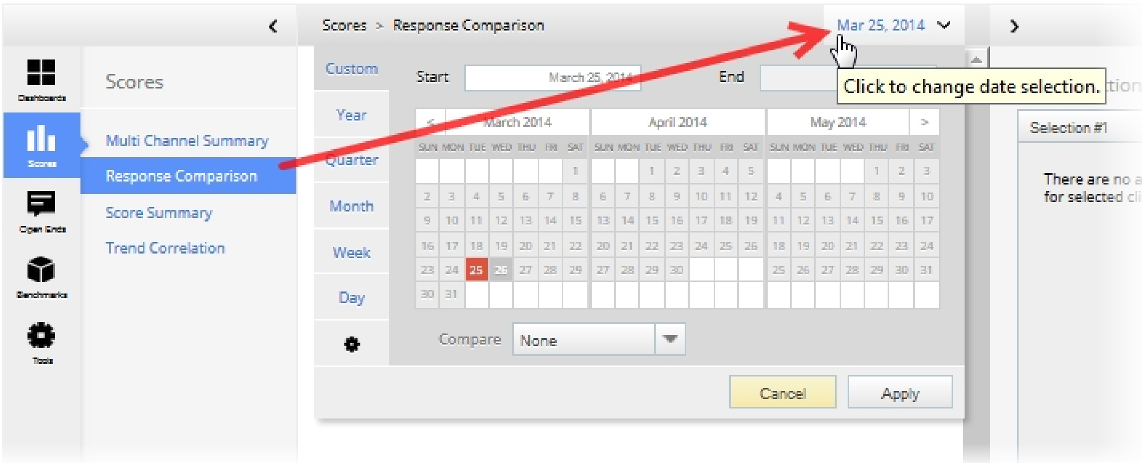
[Working with Scores]

Next Step

[Step 3 >]

Build a new Response Score Tile - Step 3

Select a date range.



Additional Information

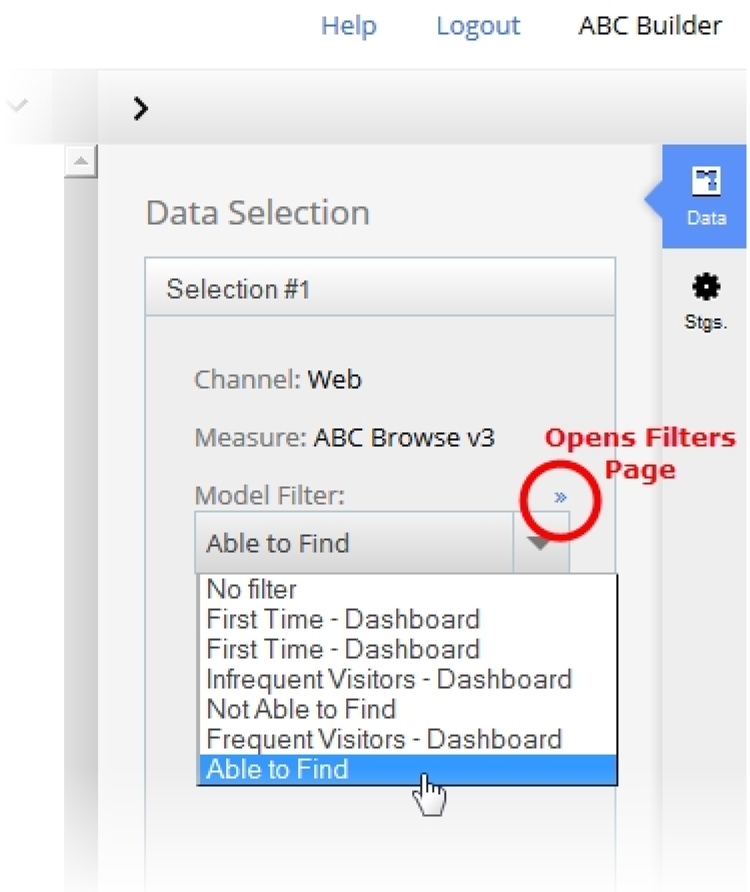
[Date Range Selection]()

Next Step

[Step 4 >]()

Build a new Response Score Tile - Step 4

Select the desired **Channel** and **Measure**. Some combinations offer filters which exist in **Analytics Portal** and may be applied if desired. The double-chevron link opens the **Filters** page of **Analytics Portal** to edit existing filters, or build a new filter.

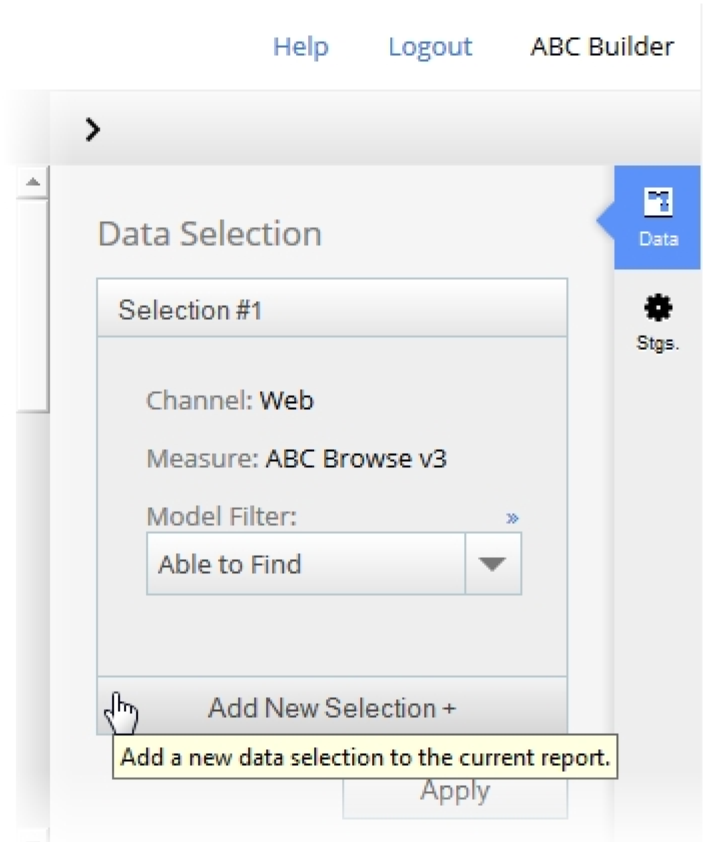


Next Step

[Step 5 >](#)

Build a new Response Score Tile - Step 5

(Optional) Click ***Add New Selection*** to incorporate another **Channel** and **Measure**.

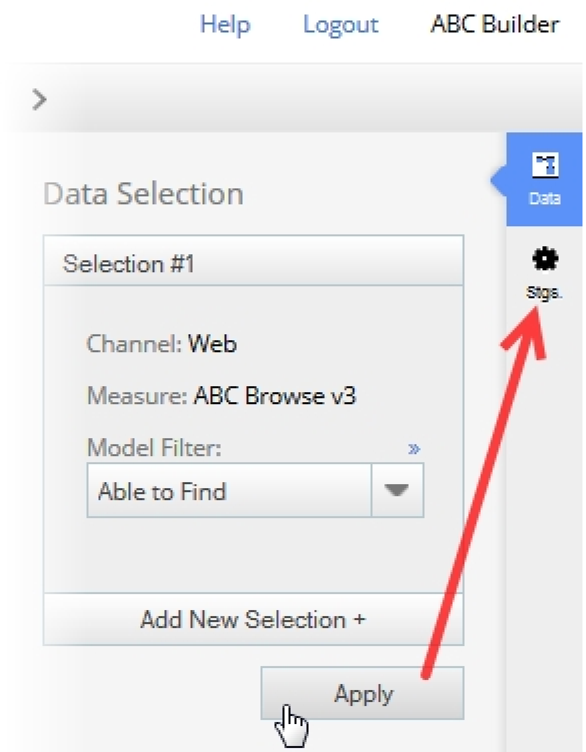


Next Step

Step 6 >

Build a new Response Score Tile - Step 6

Click ***Apply*** and then click the ***Settings*** icon (⚙). The **Settings** sidebar displays.

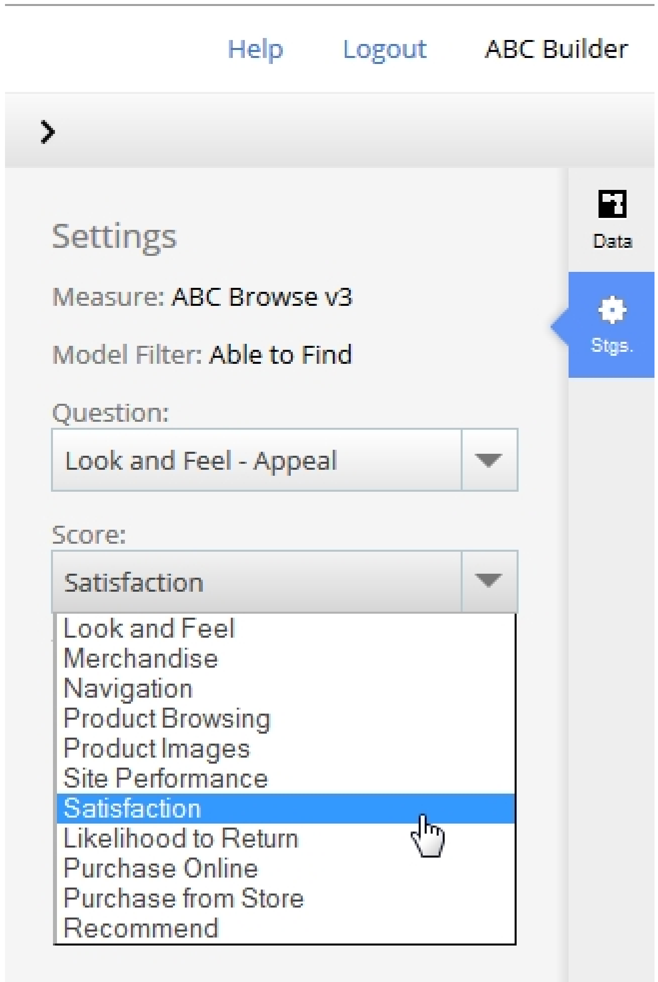


Next Step

[Step 7 >]

Build a new Response Score Tile - Step 7

Select the desired menu items for each **Selection**. The new tile displays.



Next Step

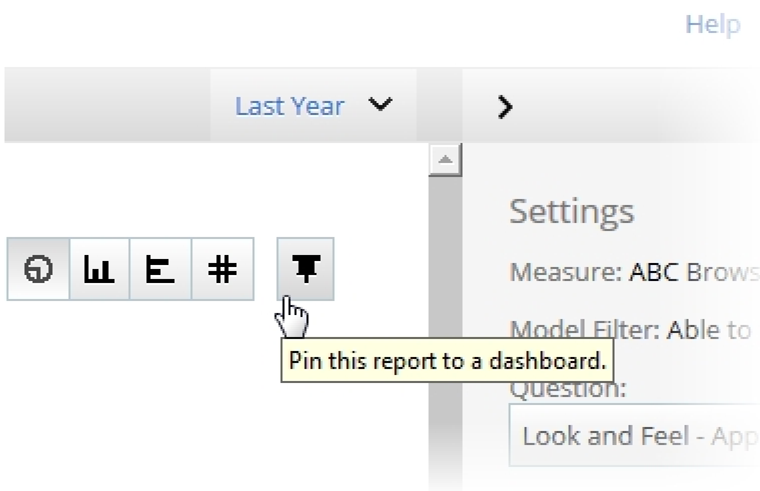
Step 8 >

Build a new Response Score Tile - Step 8

View the tile in each display option to determine how the data is best communicated. Another option is to display a chart tile along with a grid tile of the same data.

When the new tile has been generated, you can make any revisions necessary. Also, you can use the ***Pin***

button () to build a new dashboard or add the tile to an existing dashboard.



Additional Information

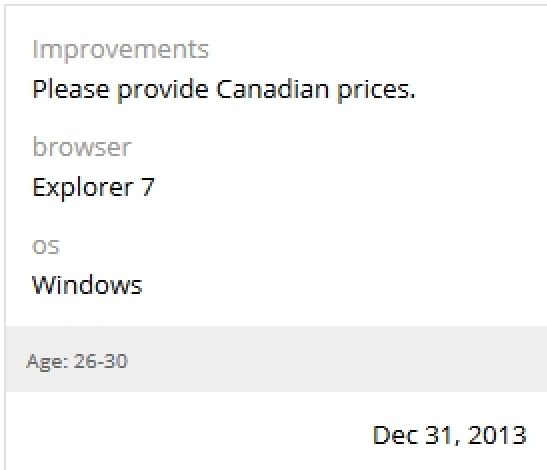
[Working with Dashboards]

Next Step

[Using the Pin Button >]

Build a New Open Ends Tile

Open ends is a category of responses comprised of narratives from respondents. Tiles show **Measure** and date range in the header, with the selected **Open End Questions** and **Comment Details** of each respondent in a separate block. A response may contain up to three **Open End Questions**, up to five **Comment Details**, and the date of the response.



Additional Information

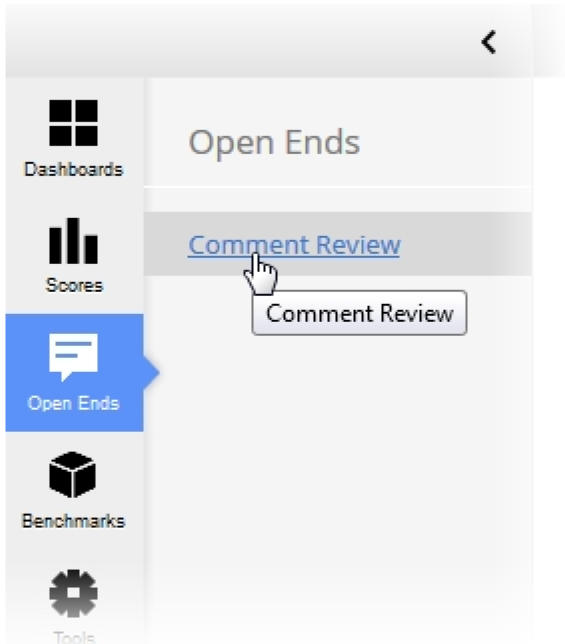
Working With Open Ends

Next Step

Step 1 >

Build a New Open Ends Tile - Step 1

On the side navigation, click the ***Open Ends*** icon ( ) and select ***Comment Review*** from the **Open Ends** sidebar.



Additional Information

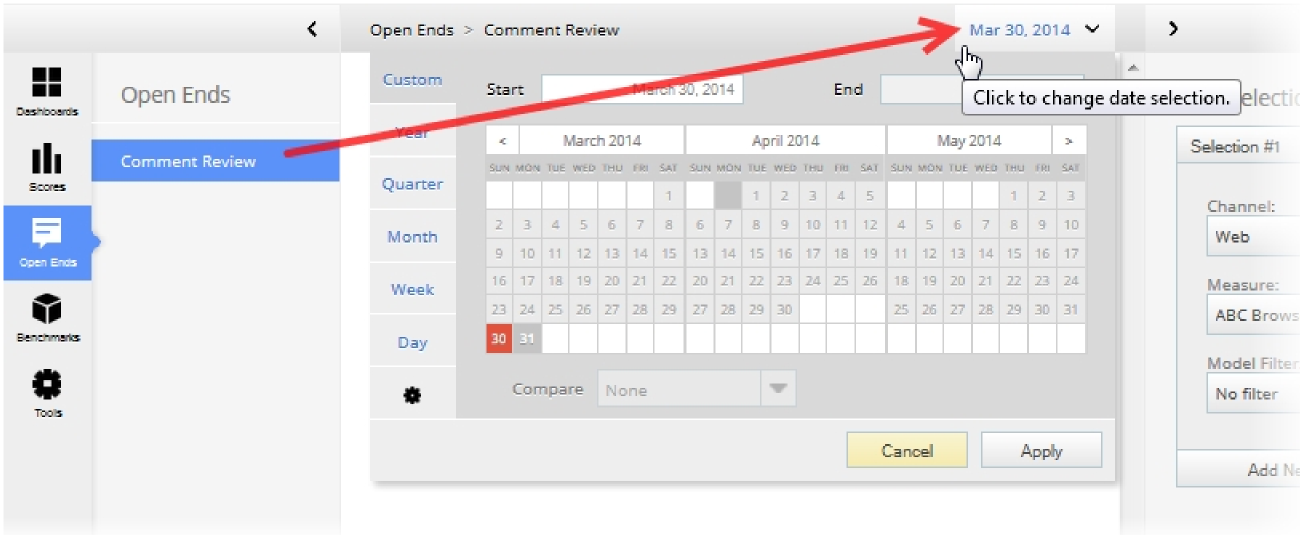
Side Navigation >

Next Step

Step 2 >

Build a New Open Ends Tile - Step 2

Select a date range.



Additional Information

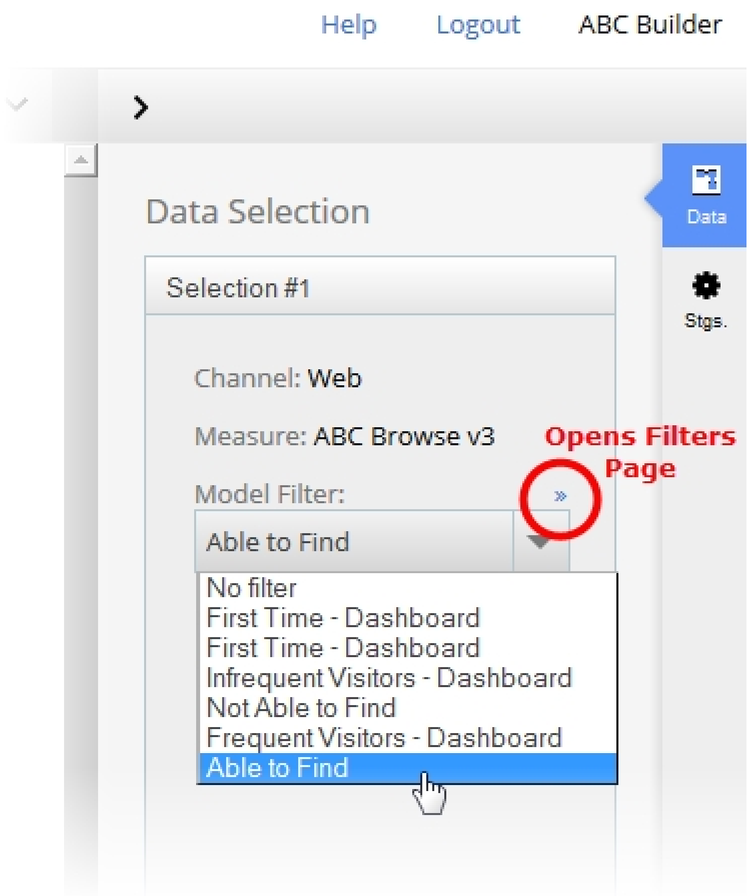
[Date Range Selection]

Next Step

[Step 3 >]

Build a New Open Ends Tile - Step 3

Select the desired **Channel** and **Measure**.

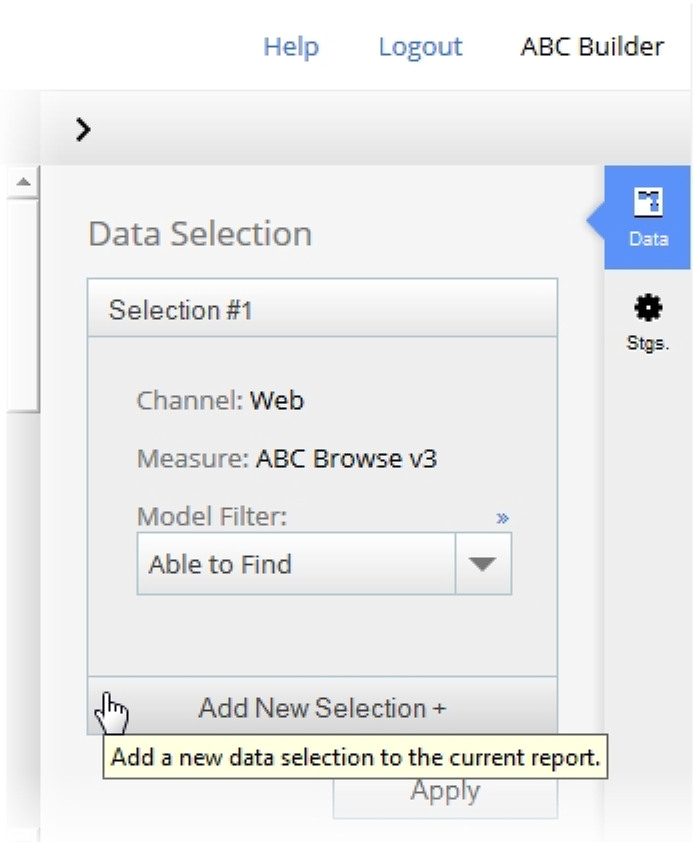


Next Step

[Step 4 >]

Build a New Open Ends Tile - Step 4

(Optional) Click ***Add New Selection*** to incorporate another **Channel** and **Measure**.

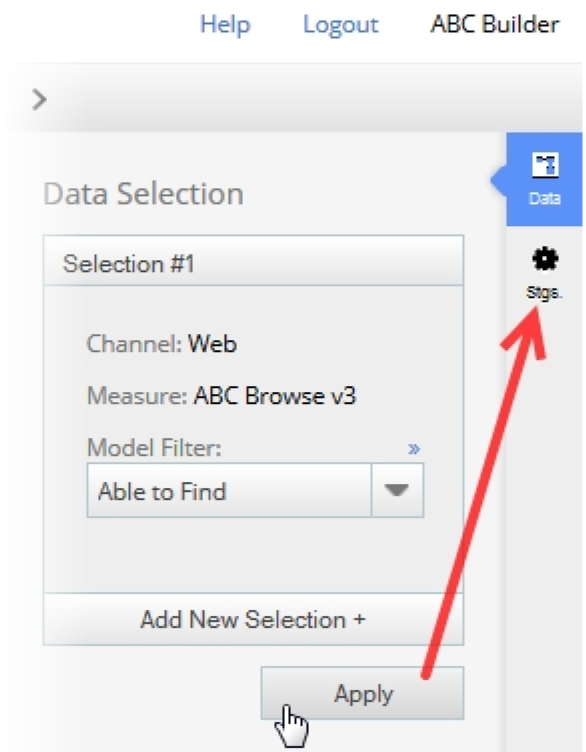


Next Step

Step 5 >

Build a New Open Ends Tile - Step 5

Click ***Apply*** and then click the ***Settings*** icon ( ). The **Settings** sidebar displays.



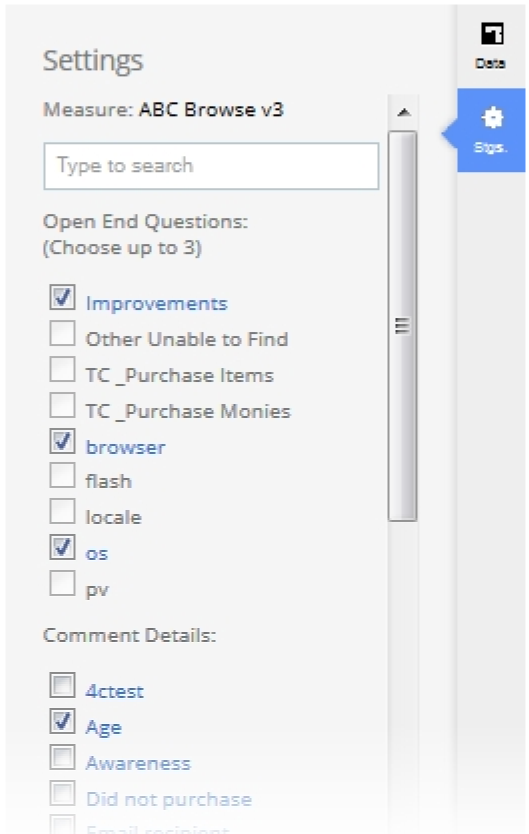
Next Step

[Step 6 >](#)

Build a New Open Ends Tile - Step 6

(Optional) Type a key word or regular expression in the search text field to view responses containing only the key word.

Select up to three **Open End Questions**, up to five **Comment Details**, and two **Scores**. Each section becomes disabled when you reach the maximum allowed selections.

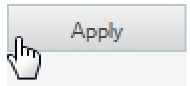


Next Step

[Step 7 >]

Build a New Open Ends Tile - Step 7

Click ***Apply***. A progress bar displays along the top of the toolbar while the system generates and displays the tile.



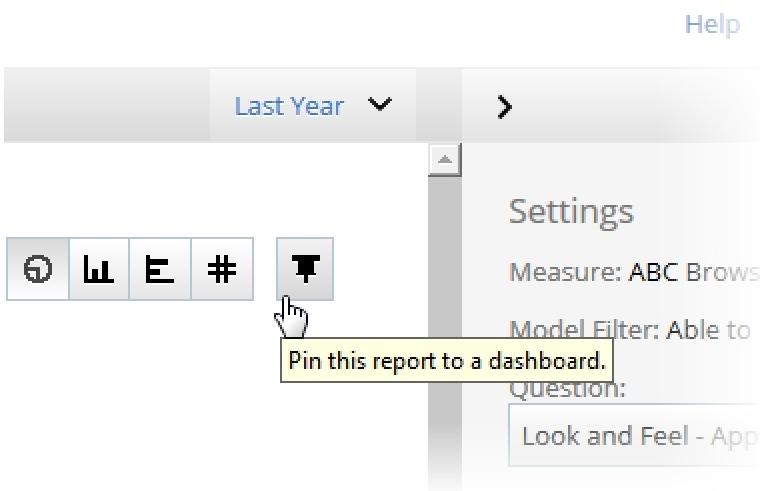
Next Step

Using the Pin Button >

Build a New Open Ends Tile - Step 8

View the tile in each display option to determine how the data is best communicated. Another option is to display a chart tile along with a grid tile of the same data.

When the new tile has been generated, you can make any revisions necessary. Also, you can use the ***Pin*** button () to build a new dashboard or add the tile to an existing dashboard.



Additional Information

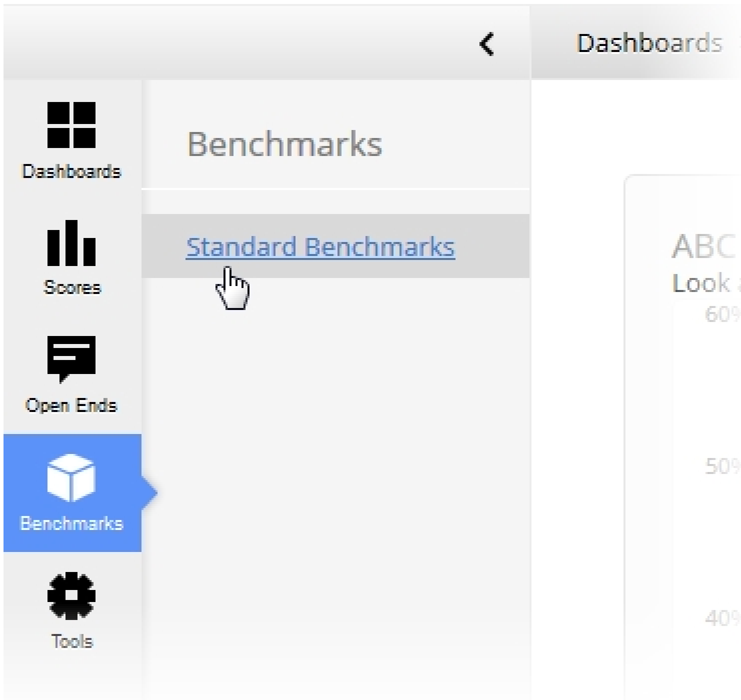
[Working with Dashboards]

Next Step

[Using the Pin Button] >

Build a New Benchmark Tile - Step 1

On the side navigation, click the ***Benchmarks*** icon (), then ***Standard Benchmarks*** from the **Benchmarks** sidebar.



Additional Information

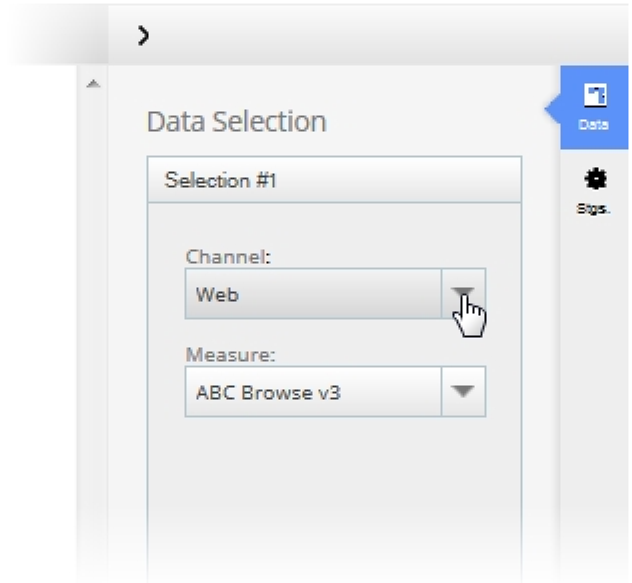
Side Navigation

Next Step

Step 2 >

Build a New Benchmark Tile - Step 2

Select the desired **Channel** and **Measure**.

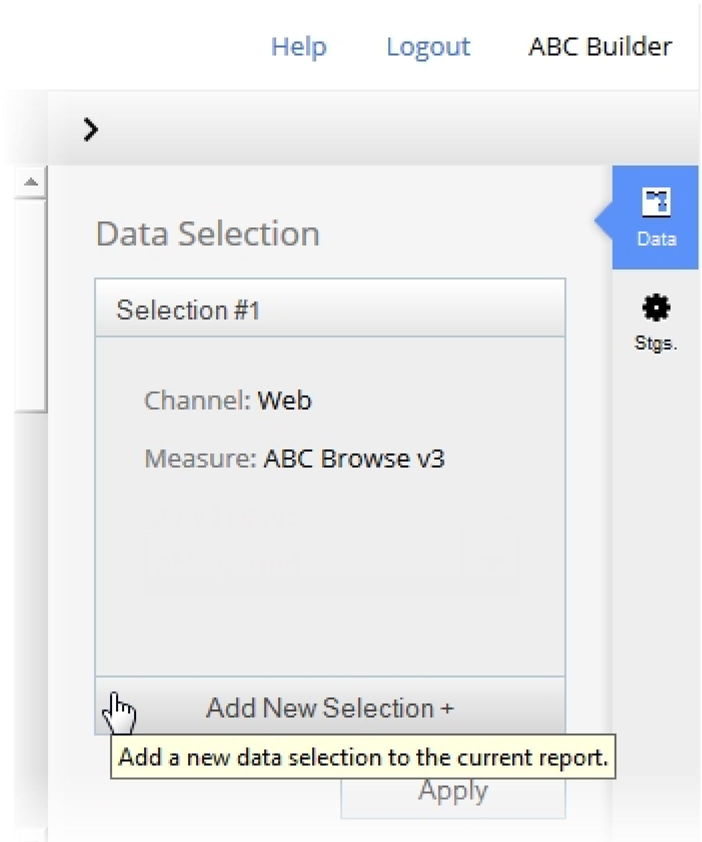


Next Step

Step 3 >

Build a New Benchmark Tile - Step 3

(Optional) Click ***Add New Selection*** to incorporate another **Channel** and **Measure**.

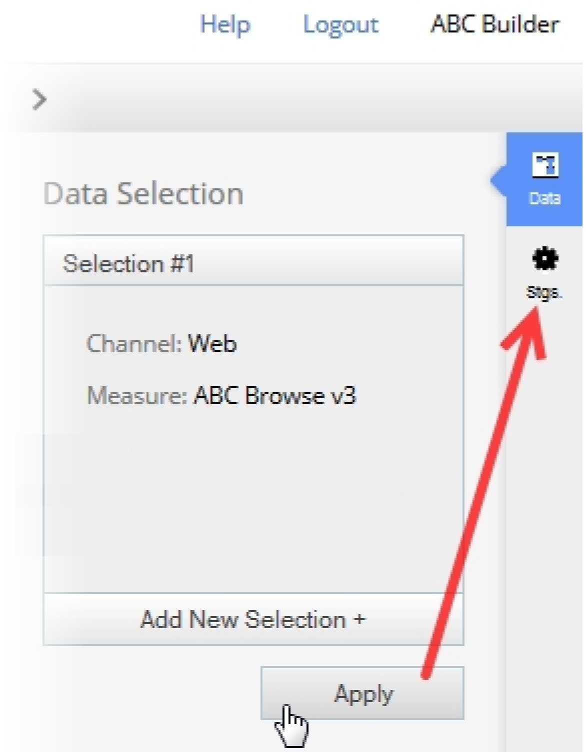


Next Step

Step 4 >

Build a New Benchmark Tile - Step 4

Click ***Apply*** and then click the ***Settings*** icon (⚙). The **Settings** sidebar displays.

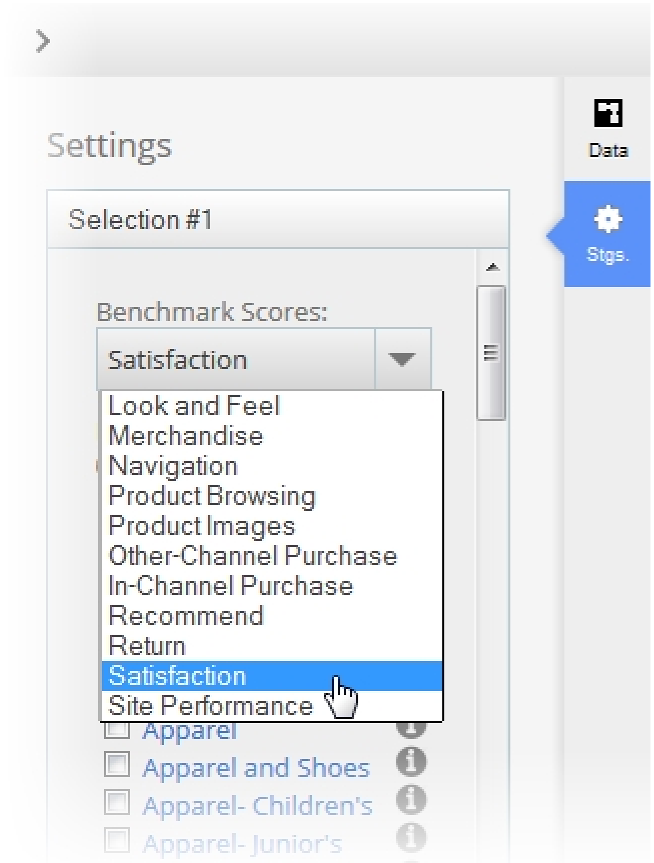


Next Step

Step 5 >

Build a New Benchmark Tile - Step 5

Select the desired **Benchmark Score**. The screen refreshes to show corresponding **Benchmark Categories**.

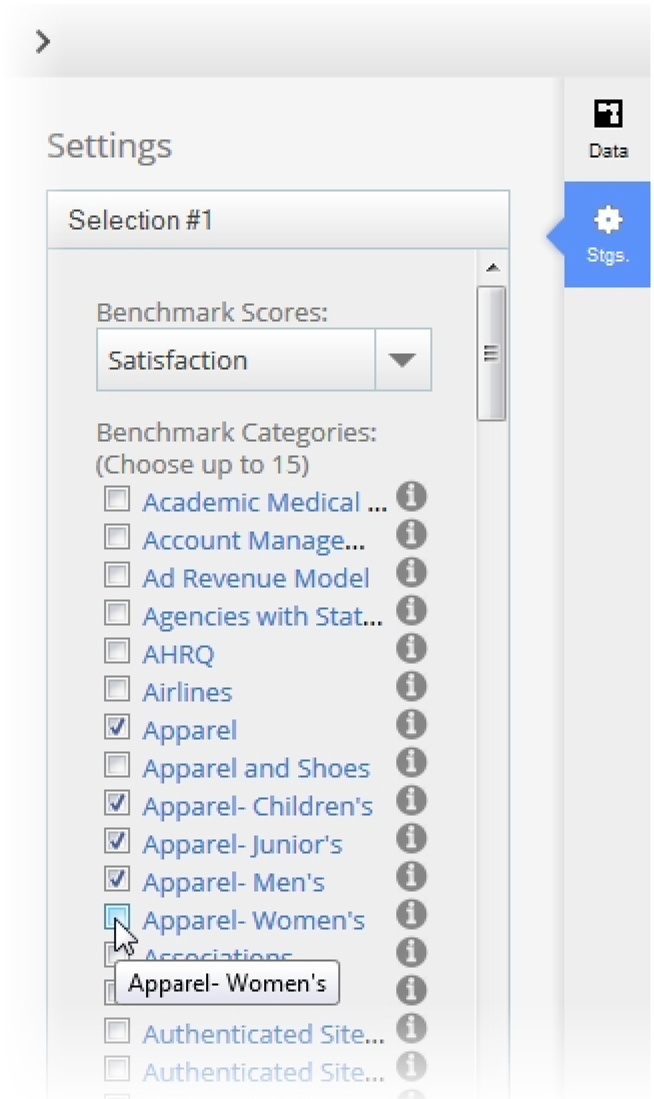


Next Step

[Step 6 >]

Build a New Benchmark Tile - Step 6

Select up to 15 **Benchmark Categories**. The list is disabled when you select the maximum.



Additional Information

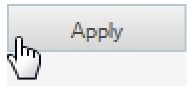
[Benchmark Categories Selection]

Next Step

[Step 7 >]

Build a New Benchmark Tile - Step 7

Click ***Apply***. A progress bar displays along the top of the toolbar while the system generates and displays the tile.

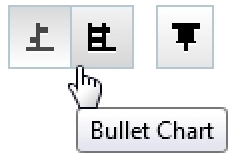


Next Step

Tile Viewing Options >

Tile Viewing Options

View the tile in each display option to determine how the data is best communicated. Another option is to display a chart tile along with a grid tile of the same data.



When the new tile has been generated, you can make any revisions necessary. Also, you can use the ***Pin*** button () to build a new dashboard or add the tile to an existing dashboard.

Additional Information

[Working with Benchmarks](#)

Next Step

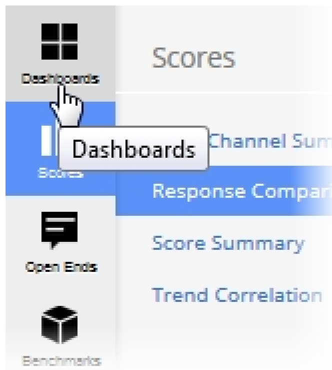
[Using the Pin Button >](#)

Edit an Existing Tile

Tiles set for a generic time frame, such as **Last Month** or **Last Year**, update automatically. However, there may be occasion to add or remove parameters of a given tile which currently displays on a dashboard.

> **NOTE:** When you edit a tile, you are actually cloning the selected tile into the work environment it was built in where you can make the desired revisions. The selected tile remains on the dashboard.

To view a dashboard, click the ***Dashboard*** icon ( ) on the side navigation and then click the dashboard title on the **Dashboards** sidebar. Users having access to **Tools** may also view a dashboard from the [Dashboard Manager]() by clicking the **View** icon ( ).



Additional Information

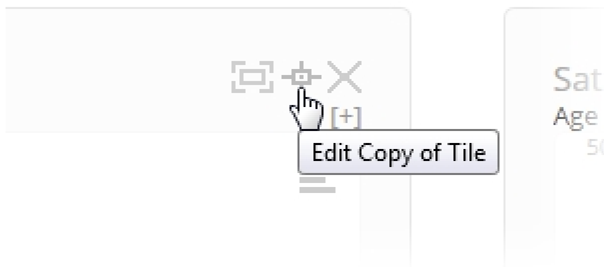
[Working with Dashboards]()

Next Step

[Step 1 >]()

Edit an Existing Tile - Step 1

Mouse-over the tile to display this icon, which allows you to edit the tile criteria. When clicked, the tile is displayed in the corresponding work environment (**Scores**, **Open ends**, or **Benchmarks**) where it was created.



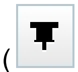
Next Step

You can:

- Edit Date Range - See Build a new Response Score Tile - Step 3 >
- Edit Data Selection - See Build a new Response Score Tile - Step 4 >
- Edit Settings - See Build a new Response Score Tile - Step 6 >

Building a New Dashboard

There are two methods of building a new dashboard:

- Pin a tile to a new dashboard - Click the ***Pin*** button () and select ***Add to new dashboard*** in the **Pin to Dashboard** dialog.
- Using the Dashboard Manager - This method allows you to setup a dashboard shell with no tiles initially. Use this method when setting up a dashboard for another owner, setting user view and edit permissions, or as a placeholder for tiles not yet selected.

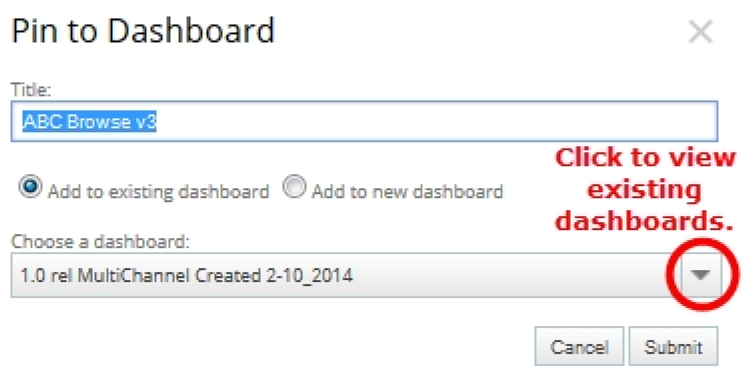
Next Step

Using the Pin Button >

Using the Dashboard Manager >

Using the Pin Button

When you click the ***Pin*** button (), the **Pin to Dashboard** dialog displays with the default setting of **Add to existing dashboard**. You can select a dashboard from the menu, or click **Add to new dashboard** to display dashboard layout options.



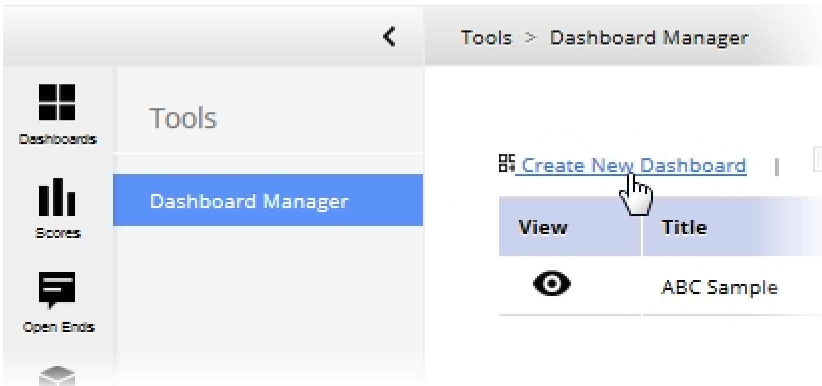
Next Step

[Step 2 >]

Building a New Dashboard with Dashboard Manager

To view the **Dashboard Manager**, click the ***Tools*** icon ( ) on the side navigation, and select ***Dashboard Manager*** from the **Tools** sidebar. The **Dashboard Manager** page displays a list of dashboards.

Click ***Create New Dashboard***. The **Create a New Dashboard** dialog displays with several layout templates and a text field to type the name of the new dashboard.



Additional Information

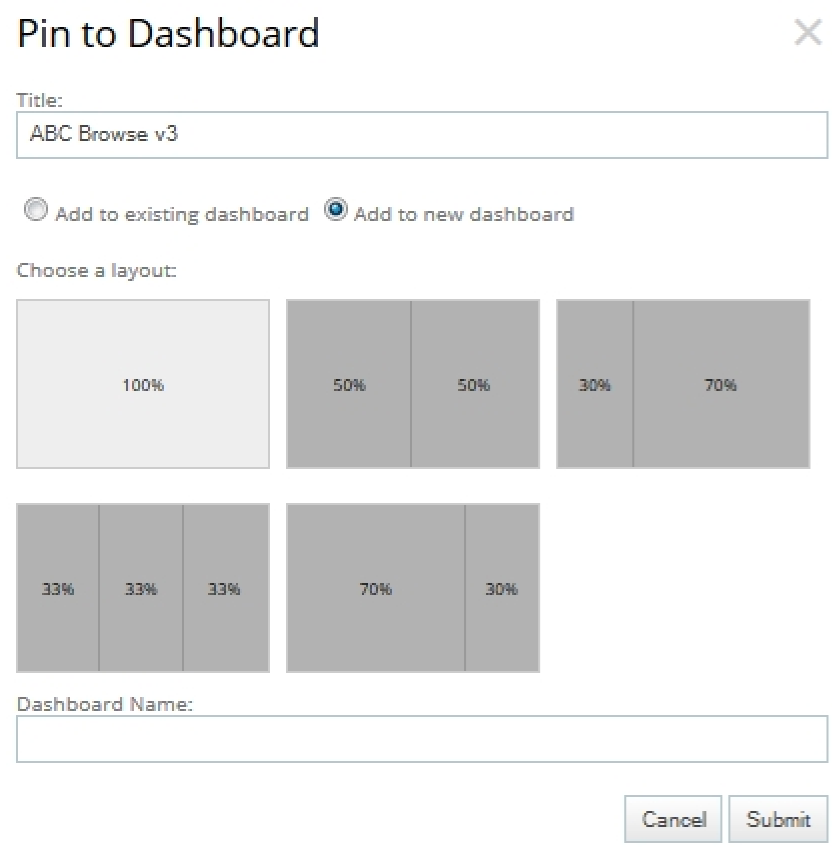
About the Dashboard Manager

Next Step

Step 2 >

Building a New Dashboard - Step 2

Select the desired layout template, type in the **Dashboard Name** and click ***Submit***.



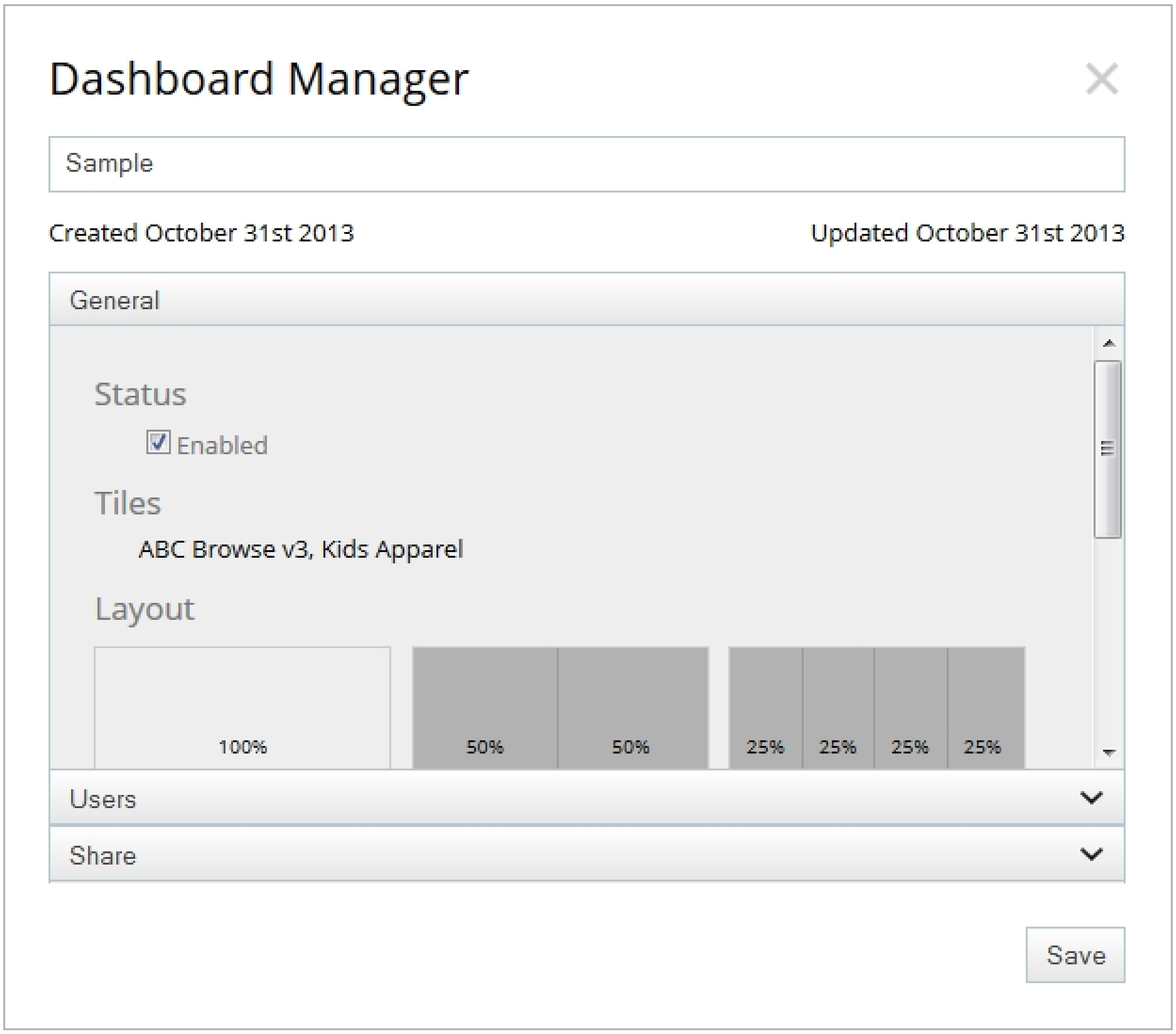
Next Step

[Step 3 >]

Build a New Dashboard - Step 3

(Optional) Click the new name to view and edit the dashboard properties, which include the following items:

- Status - Enabled by default.
- Tiles - A list of tiles currently assigned to the dashboard.
- Layout - Change layout template if desired.
- Dashboard Owner - A menu of valid users. By default, the **Dashboard Owner** has both **View** and **Edit** privileges.
- User Assignments - You may copy assignments from another dashboard, or select privileges from the list.
- Shared Reports - View the names of users who have shared the dashboard along with the date and expiration date. You may also cancel the share. Shared dashboards remain on this report for 60 days after expiration.

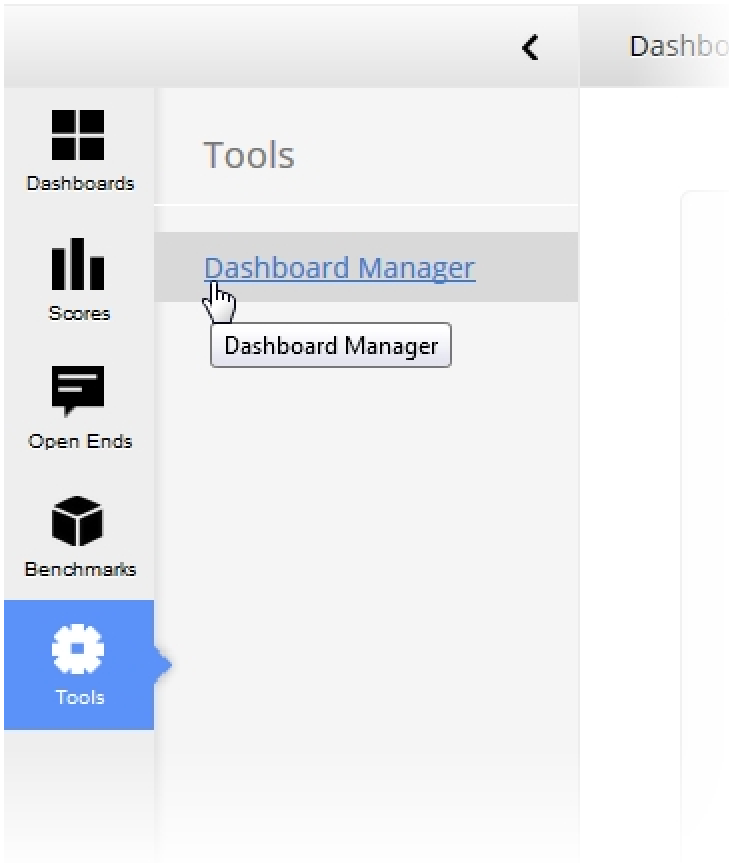


Next Step

Dashboard Setup - Save >

Dashboard Setup

To view the **Dashboard Manager**, click the ***Tools*** icon ( ) on the side navigation, and select ***Dashboard Manager*** from the **Tools** sidebar. The **Dashboard Manager** page displays a list of dashboards.



Additional Information

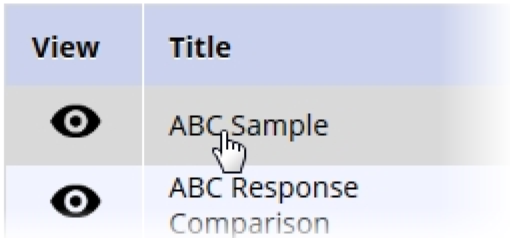
About the Dashboard Manager >

Next Step

Step 1 >

Dashboard Setup - Step 1

Click on the desired dashboard.



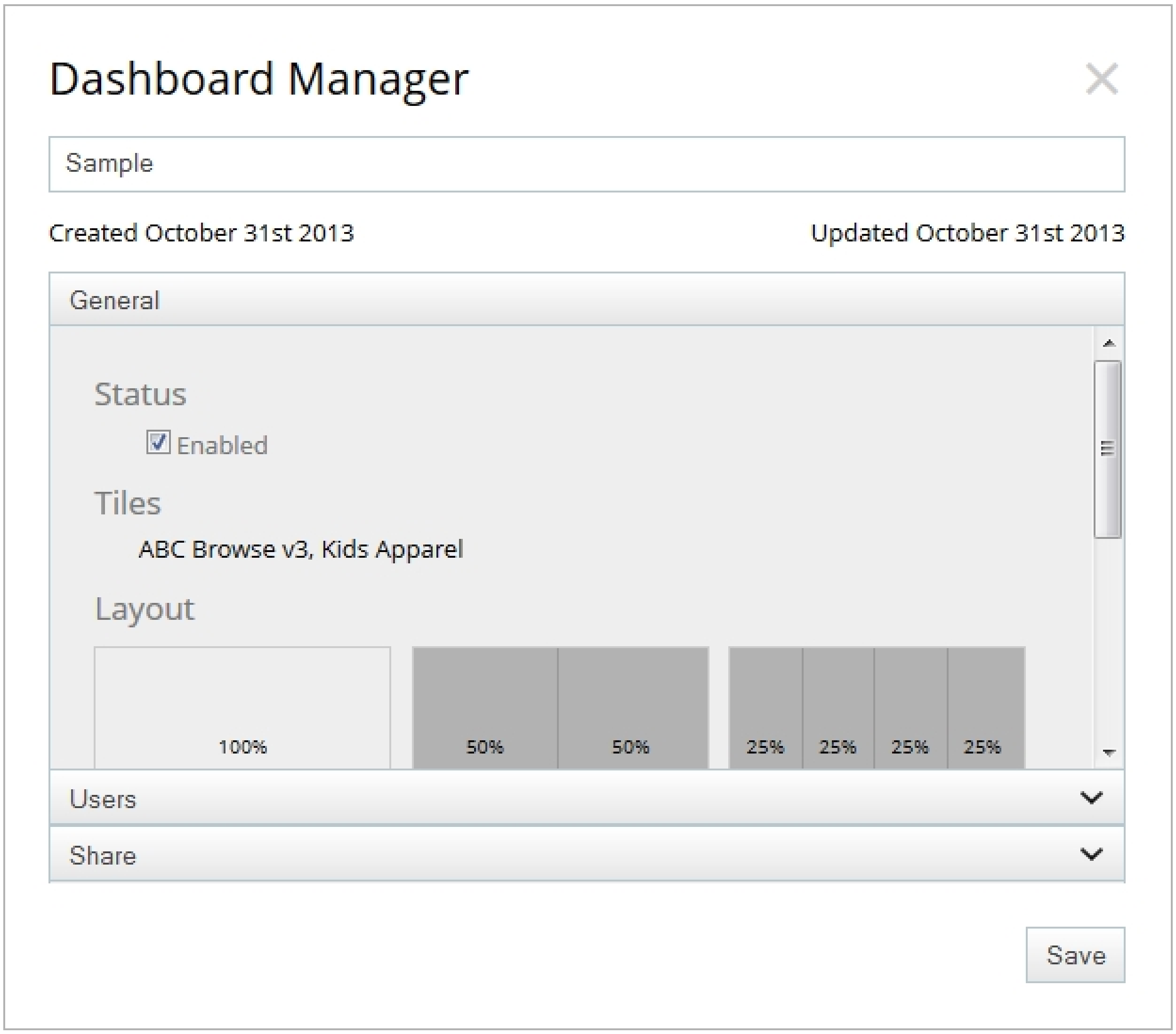
Next Step

[Step 2 >]

Dashboard Setup - Step 2

Make the desired selections:

- Status - Enabled by default.
- Tiles - A list of tiles currently assigned to the dashboard.
- Layout - Change layout template if desired.
- Dashboard Owner - A menu of valid users. By default, the **Dashboard Owner** has both **View** and **Edit** privileges.
- User Assignments - You may copy assignments from another dashboard, or select privileges from the list.
- Shared Reports - View the names of users who have shared the dashboard along with the date and expiration date. You may also cancel the share. Shared dashboards remain on this report for 60 days after expiration.



Additional Information

About the Dashboard Dialog Box >

Next Step

[Dashboard Setup - Save >](#)

Dashboard Setup - Save

Click ***Save*** to close the dialog.