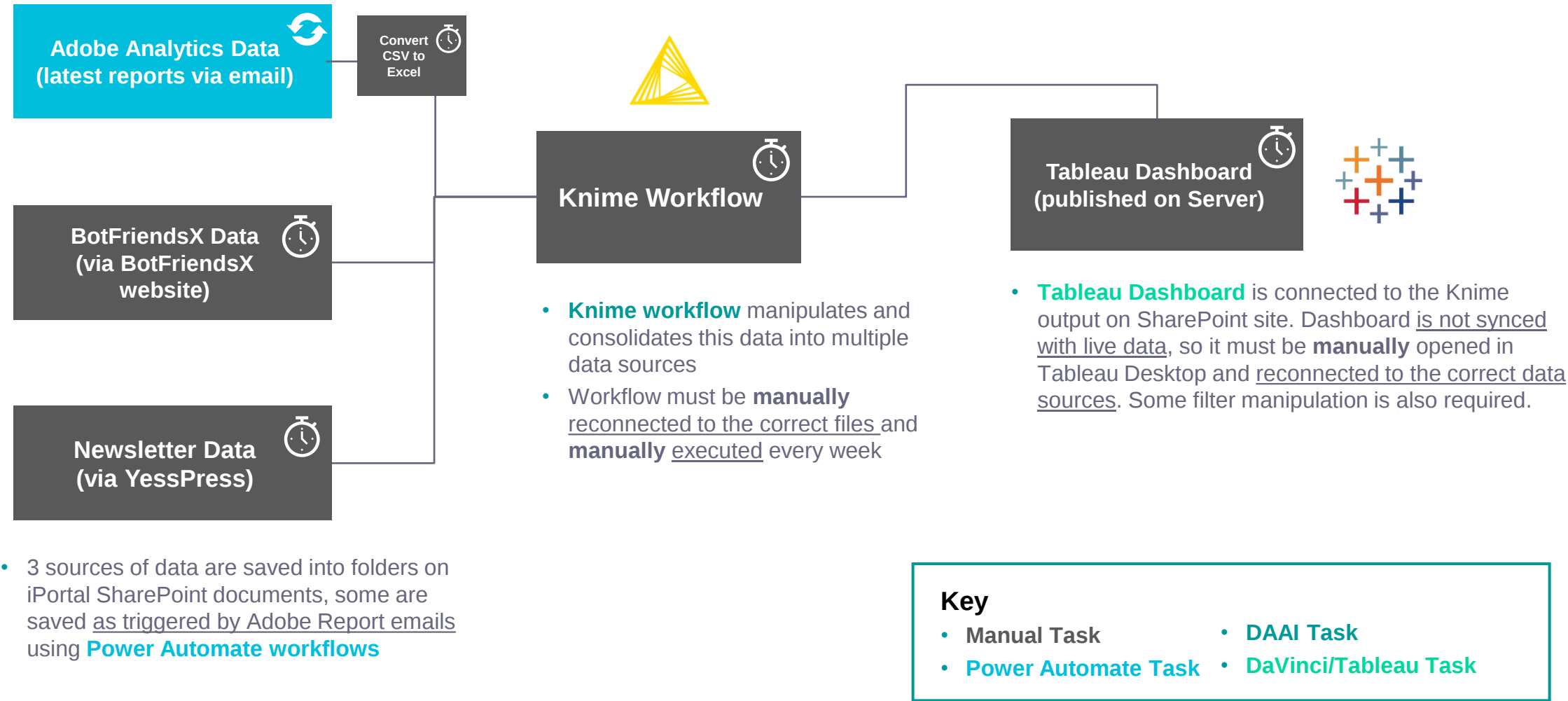


# iPortal Analytics Data Automation Process

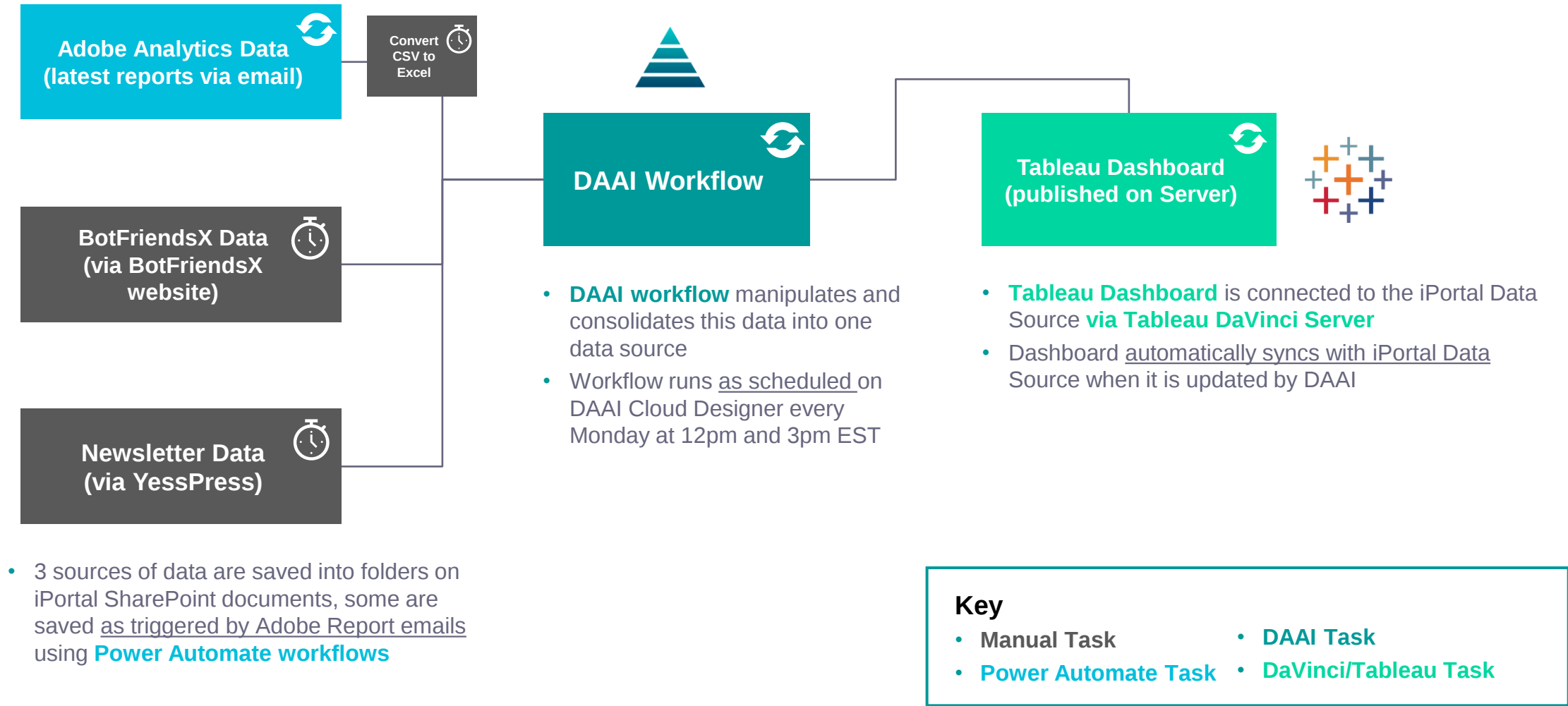
**Updated 11-7-2024**

Abby Doan, CPMDP

# iPortal Data Map (before)

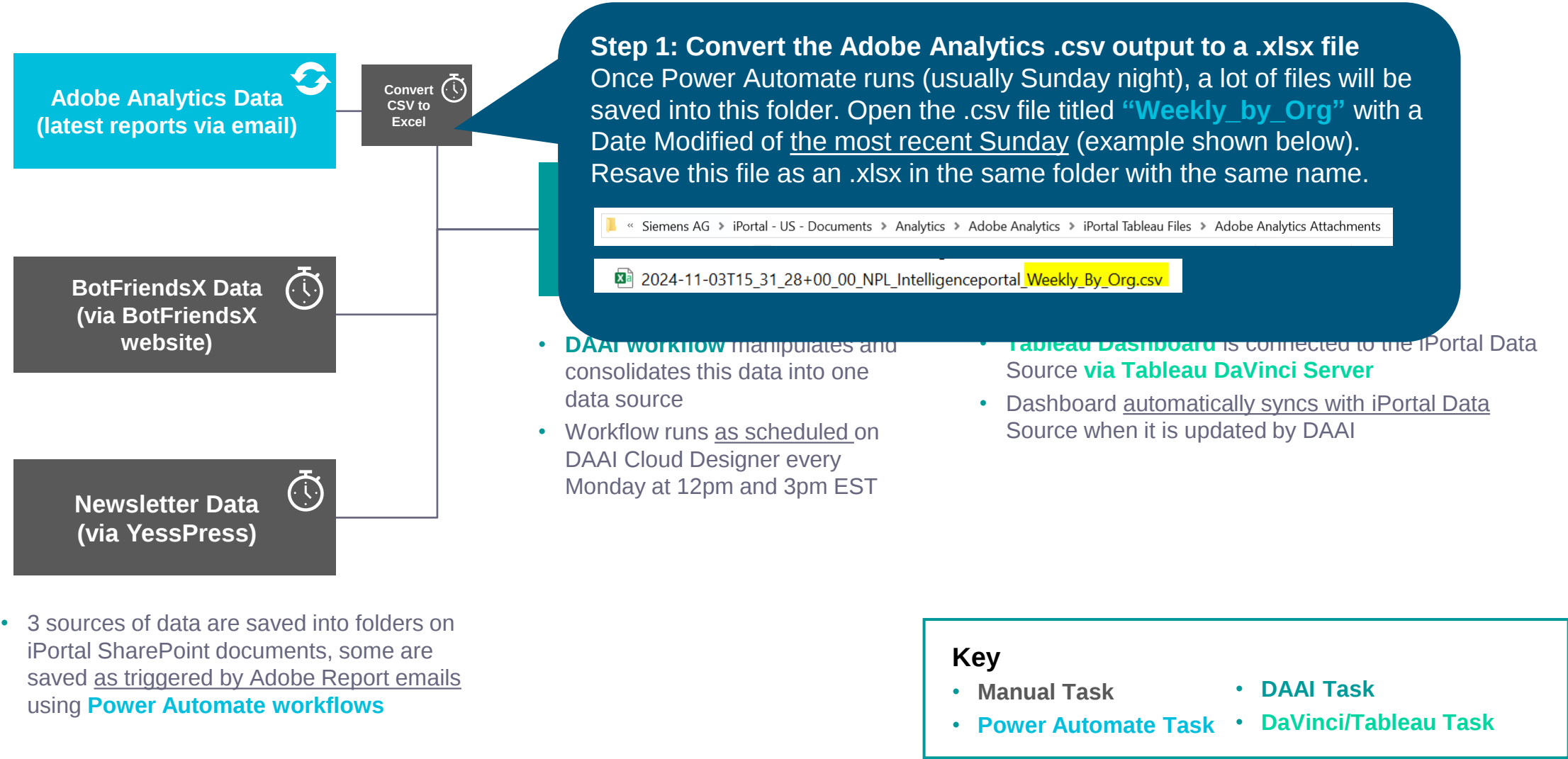


# iPortal Data Map (after)



# iPortal Automation Weekly Update Process

# iPortal Automation Weekly Update Process



# iPortal Automation Weekly Update Process

Adobe Analytics Data  
(latest reports via email)

Convert  
CSV to  
Excel

BotFriendsX Data  
(via BotFriendsX  
website)

Newsletter Data  
(via YessPress)

- 3 sources of data are saved into folders on iPortal SharePoint documents, some are saved as triggered by Adobe Report email using **Power Automate workflows**

## Step 2: Export and save BotFriendsX Data

Log into [BotFriendsX](#) with Microsoft sign-on. Navigate to Analytics and select dates to reflect the previous full week (Sunday before last - most recent Saturday). You will do 4 data exports in total. For each, make the selections and click the hamburger to download CSV. Once it downloads, open the file in Excel and resave it as an .xlsx in the folders as shown below (you can keep the name the same).

- 1<sup>st</sup> export: Part 1 (first 4 boxes)

|                      |                       |                                  |                             |
|----------------------|-----------------------|----------------------------------|-----------------------------|
| 93<br>Total sessions | 116<br>Total messages | 1.2<br>Avg. Messages per Session | 15s<br>Avg session duration |
|----------------------|-----------------------|----------------------------------|-----------------------------|

« Siemens AG » iPortal - US - Documents » Analytics » Bot Data » Downloads » Part 1

- 2<sup>nd</sup> export: Part 2 (next 3 boxes)

|                    |                 |                      |
|--------------------|-----------------|----------------------|
| 91<br>Active users | 89<br>New users | 2<br>Returning users |
|--------------------|-----------------|----------------------|

« Siemens AG » iPortal - US - Documents » Analytics » Bot Data » Downloads » Part 2

- 3<sup>rd</sup> export: Fallback Rate

|                        |
|------------------------|
| 14.2%<br>Fallback rate |
|------------------------|

« Siemens AG » iPortal - US - Documents » Analytics » Bot Data » Downloads » Fallback Rate

- 4<sup>th</sup> export: Confidence Score

|                             |
|-----------------------------|
| 99%<br>Avg confidence score |
|-----------------------------|

« Siemens AG » iPortal - US - Documents » Analytics » Bot Data » Downloads » Confidence Score

# iPortal Automation Weekly Update Process

Adobe Analytics Data  
(latest reports via email)

Convert  
CSV to  
Excel

BotFriendsX Data  
(via BotFriendsX  
website)

Newsletter Data  
(via YessPress)

- 3 sources of data are saved into folders in iPortal SharePoint documents, some are saved as triggered by Adobe Report email using **Power Automate workflows**

## Step 3: Export and save Newsletter Data

Log into [YessPress](#) and navigate to iPortal Newsletter. Open the folder below and check which newsletter's data was most recently downloaded. The files in the folders are named with the Published Date of the newsletter, which should match this date (shown in green) on YessPress.

Siemens AG > iPortal - US - Documents > Analytics > Newsletter

✓ Completed  
2024.10.30 16:11

Select the next newsletter that is marked as Completed but has not been downloaded into the Newsletter folder. Keep note of the Published Date as you will have to rename each file with the following naming convention: KPI\_mmddyyyy.xlsx

For each export, scroll down to the section and download the Full List (will download as an .xlsx file, you just need to change the name before saving to the folder).

- 1<sup>st</sup> export: Your KPIs

« Siemens AG > iPortal - US - Documents > Analytics > Newsletter > KPI > Downloads

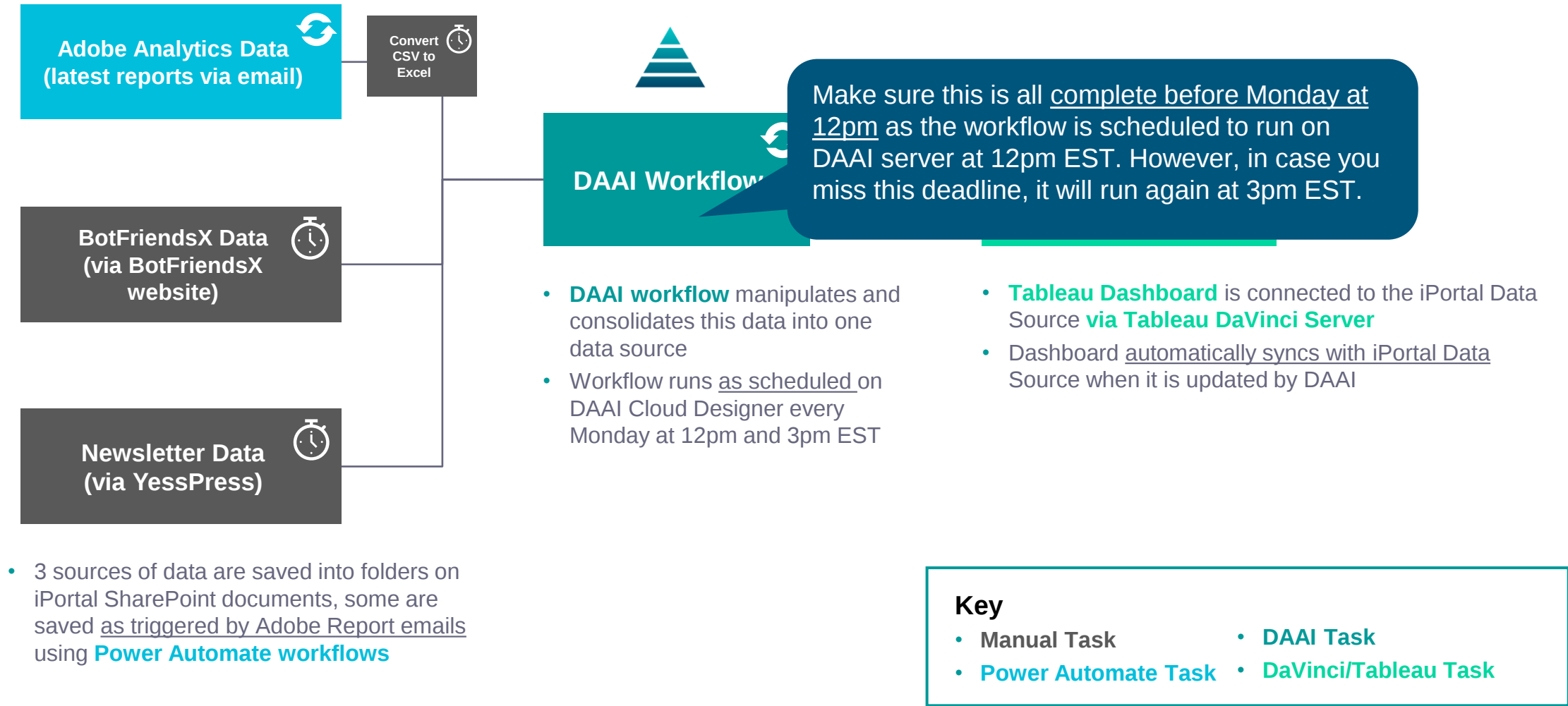
- 2<sup>nd</sup> export: Top 10 Organizations Click-through rate

« Siemens AG > iPortal - US - Documents > Analytics > Newsletter > Click by Team > Downloads

- 3<sup>rd</sup> export: Top 10 Organizations Reading rate

« Siemens AG > iPortal - US - Documents > Analytics > Newsletter > Read by team > Downloads

# iPortal Automation Weekly Update Process



# iPortal Automation Monthly Update Process

# iPortal Automation Monthly Update Process



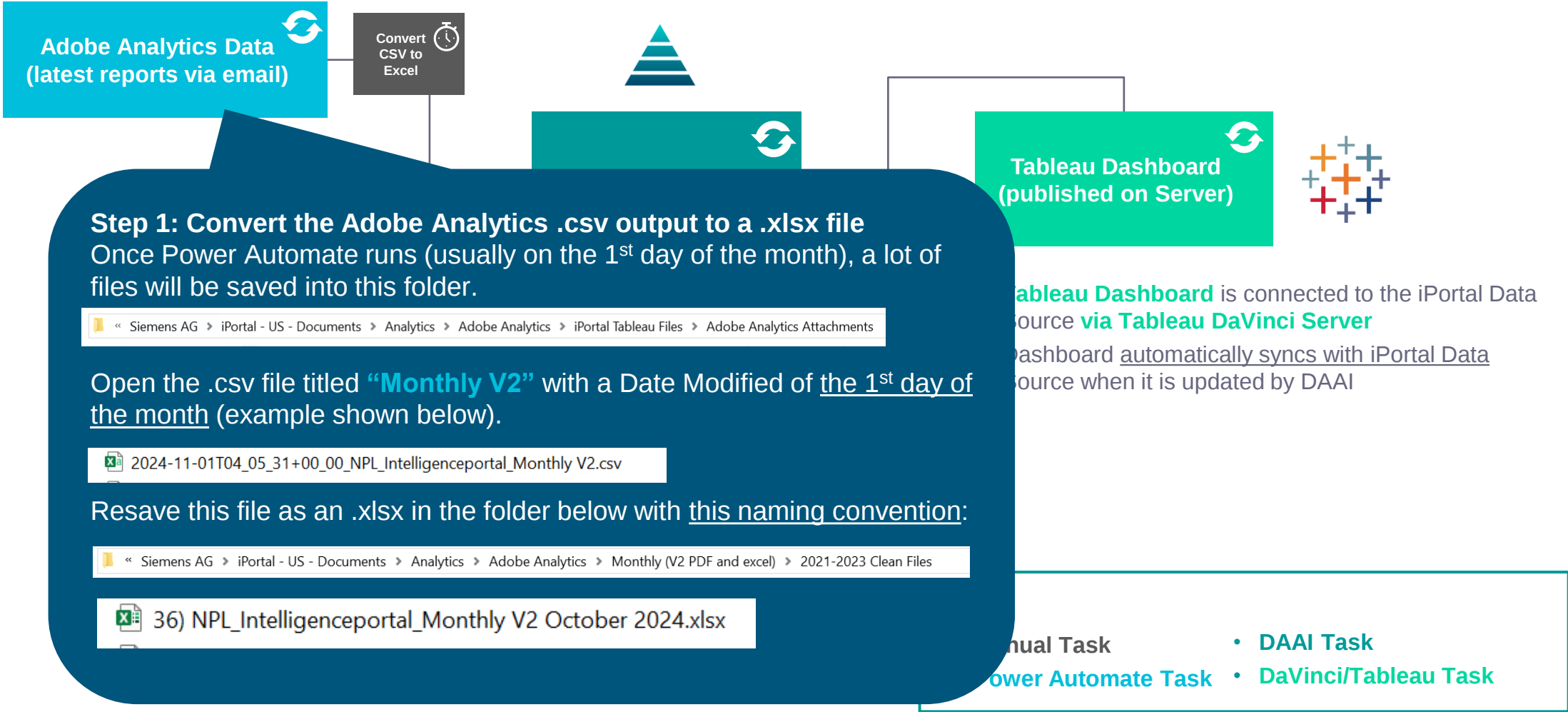
- **DAAI workflow** manipulates and consolidates this data into one data source
- Workflow runs as scheduled on DAAI Cloud Designer on the 2<sup>nd</sup> day of the month at 12pm and 3pm EST

- **Tableau Dashboard** is connected to the iPortal Data Source **via Tableau DaVinci Server**
- Dashboard automatically syncs with iPortal Data Source when it is updated by DAAI

**Key**

- Manual Task
- Power Automate Task
- DAAI Task
- DaVinci/Tableau Task

# iPortal Automation Monthly Update Process



# iPortal Automation Monthly Update Process



- **DAAI workflow** manipulates and consolidates this data into one data source
- Workflow runs as scheduled on DAAI Cloud Designer on the 2<sup>nd</sup> day of the month at 12pm and 3pm EST
- **Tableau Dashboard** is connected to the iPortal Data Source **via Tableau DaVinci Server**
- Dashboard automatically syncs with iPortal Data Source when it is updated by DAAI

### Key

- Manual Task
- Power Automate Task
- DAAI Task
- DaVinci/Tableau Task

# Links to Recording & Other Documentation

Video Recording

[Link](#) -> add link here

Documentation

[Link](#)