



Optimizely Experimentation Web Platform Expert

Reference Material for the 2023 Optimizely Experimentation Web
Platform Expert Certification Exam

Introduction

This reference guide is meant to help you in your goal to become a certified Optimizely Experimentation Web Platform Expert. It contains centralized links to key Optimizely documentation that aligns with what the certification exam measures.

You will find each of the topics on the certification exam outlined in the [Experimentation Web Platform Expert Certification Exam Guide](#) and linked to documentation in this reference guide to help you review, learn and prepare for the exam.

This reference guide is ancillary support for knowledge that you should already have as a practicing Web Platform Expert. You should have prior exposure to the product and knowledge through a combination of previous Optimizely training and hands-on experience with the Web Experimentation product.



Reference Links

Table 1 includes links to resources that are aligned to each of the content areas on the Experimentation Web Platform Expert certification exam. Table 2 includes additional general resources not aligned to particular content areas.

As of September 2022, the Optimizely Education team is in the process of migrating to a new website and Optimizely Academy. While we update our information and links about **instructor-led training courses** applicable to this course of study, please email education@optimizely.com with any questions or for more information.

Table 1. Resource links outlined by exam content area.

General Platform Setup		
Account Settings	User management	Access the Account ID and Multi-account login in Optimizely
		Manage collaborators in Optimizely Web
	Cookie compliance	Cookies and localStorage in the Optimizely snippet
	Statistical significance	Change the statistical significance setting
		Statistical significance in Optimizely
		How Stats Engine calculates Optimizely Results
	Results filtering	The Experiment Results page for Optimizely
		IP Filtering: Exclude IP addresses or ranges from your results
	Linking to create custom snippets	Create, view, and manage custom snippets in Optimizely Web
		Custom snippets in Optimizely Web
General Snippet Management	Snippet settings and what they do	Implement the one-line snippet for Optimizely Web
	Performance improvements	Best practices for improving site performance with Optimizely
	Order of activation	How the Optimizely snippet works: Order of activation
	Setup for Dynamic Websites (activation and trigger)	Dynamic websites
Support for dynamic websites: Use Optimizely on single page applications		

	Different ways to load the snippet	Synchronous and asynchronous snippet loading Install the Optimizely snippet as a non-blocking resource
Add-ons	Extensions	Extensions: Create reusable templates for custom features in Optimizely
		Extensions
	Integrations (out of the box)	Integrations in Optimizely Web and Full Stack
		Analytics integrations for Optimizely
		Integration types
	Bring Your Own ID	Bring your own visitor ID (BYOID)
Privacy Settings	Privacy and Data Protection Controls	
	Project Settings: Privacy in Optimizely Web Experimentation	
Managing Experiments		
Experiment Types	A/B testing	Experiment Types: AB, Multivariate, and Multi-page
	Multivariate testing	Multivariate tests for Optimizely
	Multi-arm bandit	Maximize lift with multi-armed bandit optimizations
Experiment Setup	A/B testing	Six steps to create an experiment in Optimizely Web
	Multivariate testing	Multivariate tests for Optimizely
	Multi-arm bandit	Multi-armed bandits vs Stats Accelerator: when to use each
Personalization Campaigns	Setting up a personalization campaign	Six steps to create a campaign in Optimizely Web Personalization
	Handling exclusion groups	Mutually exclusive experiments in Optimizely Web
	Setting priorities	Personalization: Amplify messaging with multi-threaded campaigns
Code Execution Order	Project JavaScript	Custom code, shared code, project Javascript and extensions: when to use each
		Project Settings: jQuery and Project JavaScript settings in Optimizely

		JavaScript execution
	Page activation	Activate pages in Optimizely
		Use timing changes to load elements on the page asynchronously
		Page activation
	Shared code	Shared code: Run custom JavaScript and CSS across all variations
	Variation code	Custom code in Optimizely Web
General Experiment Configuration	Traffic allocation	Change traffic allocation and distribution in Optimizely
	Starting and pausing	What is the difference between publish, start, and pause?
		Launch and monitor your experiment
		Changing an experiment while it is running
Publishing and preview	Preview mode and publishing in Optimizely Web	
Change Types	Visual changes	Visual Editor in Optimizely
	Code changes	Synchronous and asynchronous code change loading
	Redirects	Redirect experiments: Test two URLs in Optimizely
		Unblock Optimizely's additional redirect check
		Redirection
Enhanced redirect analytics		
Experiment Components		
Targeting	General target concepts	URL targeting in Optimizely: Choose where your experiment runs
	Single-use targeting	Custom JavaScript audience targeting
	Reusable vs. non-reusable	Alternative to pages for URL targeting in Optimizely
Pages	Definition and usage of pages	Pages: Choose where experiments and campaigns run
	Setting up pages	Set up a page in Optimizely Web

	Triggers and Conditions	Activate pages in Optimizely
	Choosing the right triggers/timings for activation	Dynamic websites
	Setting up the URL targeting	Set up URL Targeting
Events	Types of events (Click, Custom, Page view)	Events: Tracking clicks, pageviews, and other visitor actions
		Send events using Optimizely Web Experimentation
	Creating events	Set up events in Optimizely Web
	Event tags (Revenue, Value, Custom)	Custom event tracking
		Custom events in Optimizely Web
	Visual tags	Set up a tag
	Cross project events	Cross-project events
Metrics	Metric hierarchies	Primary and secondary metrics and monitoring goals
	Metric settings	Create a metric in Optimizely Web
	Metric types	Types of metrics and when to use them
Attributes	Types of attributes (custom attributes, external attributes e.g., list, table)	Strategy essentials: Personalization
	Defining custom attributes	Custom Attributes: Capture visitor data through the API in Optimizely
	Uploading tables and lists	List attributes vs table attributes: Use cases and features
	Uploading attributes from different tools	Set up list attributes
List Attributes		
Audiences	Defining an audience	Audiences: Choose which visitors to include
		Set up audiences in Optimizely: Audience Builder
	Using attributes in audiences	Audience activation and troubleshooting

	Qualifying/disqualifying audiences	Referrer URL audience condition: Include and exclude visitors by search term
		Build interest-based audiences with adaptive audiences
	Advanced audience conditioning	Audience conditions: Descriptions and examples
		Audience Conditions
		Custom audience targeting
Troubleshooting & QA		
General Troubleshooting	Using Preview	Preview mode in Optimizely Web
		Troubleshooting
		Troubleshooting in Optimizely Web
	Monitoring events	Check event firing in a live experiment or campaign in Optimizely
	Debugging events	Troubleshooting: Metrics do not track correctly in Optimizely
	Using Optimizely Assistant	The Optimizely Chrome extension
		Install the Optimizely Desktop App
QA	QA'ing the general set up	QA in Optimizely Experimentation
		Troubleshooting: Optimizely Assistant loading Chrome extension
	QA cookie(s)	Enable opt-in options for Optimizely cookies and local storage
		Intelligent tracking prevention and Optimizely
	Force variations (using query parameters and the QA tool)	Force behaviors in Optimizely using query parameters
		Query parameters
	Optimizely Info Log	View project or experiment change history
		Read the Optimizely log

Table 2. General experimentation resource links.

General Experimentation Web Platform Expert Resources		
General	Self-paced online Experimentation courses (free)	Getting Started with Optimizely Experimentation Getting Started with Optimizely Web Experimentation
	FAQ and Troubleshooting	FAQ and Troubleshooting
Glossary	OPTIPEDIA Optimization Glossary	OPTIPEDIA Optimization glossary
	Optimizely Terminology Glossary	Glossary of Optimizely terminology