



# Journey Reports

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## Introduction

Journey reports provide data about how contacts move along a journey in Total Expert, giving you, as the creator of a journey, insight into the journey's effectiveness. This includes data aggregated from contacts belonging to all users of the journey in your organization, not merely your own contacts. Contact counts are displayed for whichever individual components you choose, allowing you to see detail at any key steps that help you understand how people experience the process.

## Commonly Used Terms

Name	Description
journey	A series of automated steps a contact is guided through in order to achieve a goal for that contact. A journey may include decision points and/or secondary workflows that can be triggered by the contact's progress.
journey report	An output of the number of contacts who have passed through specified parts of a journey, used to determine how the journey is performing.

## Creating a Journey Report

You can create a report for a journey either before or after publishing it. If you create the report after it has been published and run for any contacts, it will include any contacts that have already been through the journey. This means that it would produce the same results as an identical report created before the journey began running.

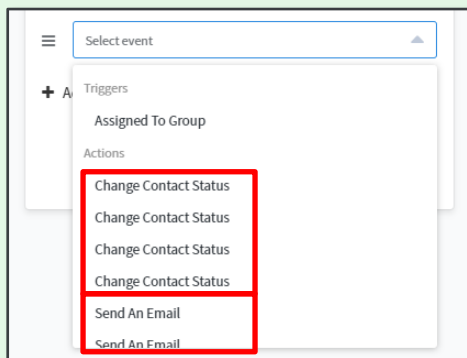
1. Navigate to one of the following pages to locate the journey you want to create a report for:
  - a. **Journeys → Saved**
  - b. **Journeys → Available Journeys**
  - c. **Journeys → Active Journeys**
  - d. **Journeys → Inactive Journeys**
2. Check the box in the left column for the journey you want.
3. At the top of the page, click the **View Journey** button (hamburger icon). The read-only view of the journey is shown on the canvas.
4. In the upper-right corner of the page, click the **View reports** button. The Reports slide-out panel opens; any reports that have been created for this journey previously are shown here, each in its own tile.
5. Click the **+Add report** button to open the report editor in the slide-out panel. In this editor:



- In the **Name** field, enter a short, suitable name for the report. This name will be shown at the top of the completed tile.
- (optional) In the **User Filter** field, select 1 or more of the users in your organization. The report will show results only for contacts added to the journey by those users.
- (optional) In the **Team Filter** field, select 1 or more of the teams in your organization. The report will show results only for contacts added to the journey by members of those teams.
- By default, the **Only count unique contacts** toggle switch is turned on; this means that if the same contact passes along a journey more than once, only their first pass will be counted. Switch this toggle off to count every pass along the journey, including repeat passes by the same contact.
- In the **Events** section, select the name of a component from the journey in the first drop-down list. You can select any trigger, action, or event, but conditions are not available.
- Repeat the previous step for any additional components you want to add to the report. You can add or remove slots by clicking the **+Add event** button below or the **delete** (trash can) button to the right of each slot. You can also reorder the slots by clicking and dragging the hamburger button to the left of the slot up or down the list.

### Tip

These boxes refer to the name defined for each component. When setting up a journey, give each component a unique name to make it easier to discern among different components of the same type when building a report and when viewing the finished journey report. Below is an example of a journey whose components use only default names; it is unclear which option refers to which instance of a component type.



- You must include at least one component; otherwise you can select as many or as few components as you want, up to a maximum of all the available components in the journey.



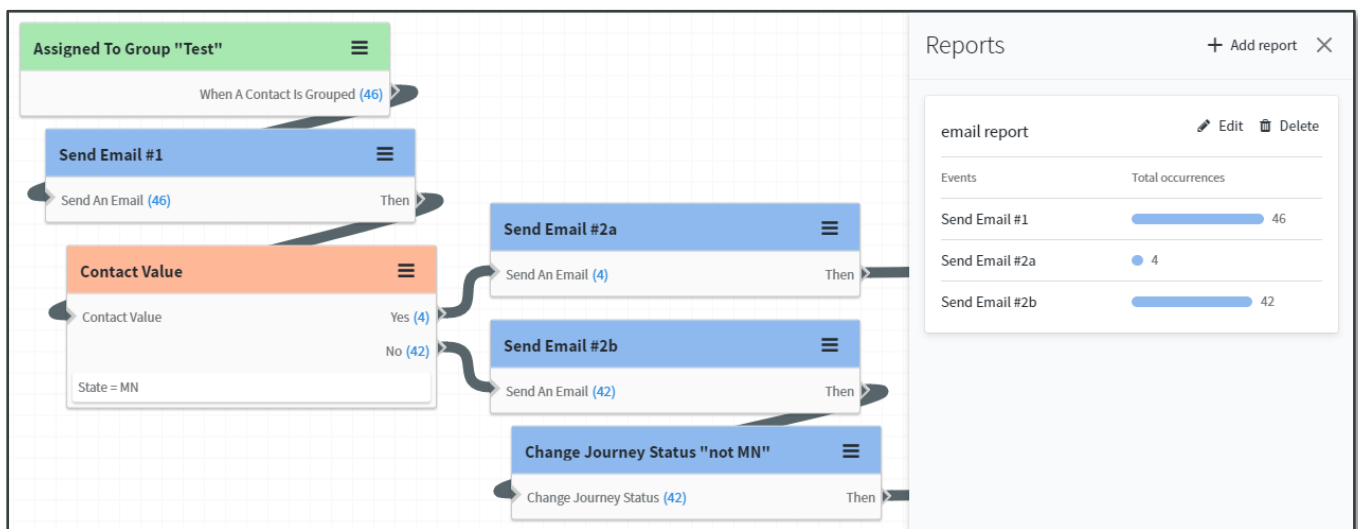
- ii. You can select each component only once. Components that have already been added to the report are grayed out in the drop-down list.
- g. (optional) Check the **This report should be visible for all users on this journey** box if you want all users with access to the journey to be able to see the report. (As the creator of the journey, you will see results for all contacts for all users; other users will only see results based on their own contacts on the journey.) Leave it unchecked to prevent any other users from seeing the report.

### Note

This option is not available if any User Filters or Team Filters are selected above.

- h. Click the **Done** button. The report editor closes, and a new tile is created for the report.

Each time you refresh this view of the journey, the reports panel will update with current numbers based on the use of the journey to date. A basic journey is shown below with a report showing how many contacts were targeted by each email in the journey.



## Editing or Deleting an Existing Report

You can edit a report by clicking the **Edit** button in its tile. The report editor opens for that report. Make any changes the same way you would when creating a new report and click the **Done** button

You can delete a report by clicking the **Delete** button in its tile, then clicking the **Yes, delete** button in the confirmation box.

### Note

You can create multiple reports for a journey, but you can only edit one report at a time. While you are creating a new report or editing an existing one, the +Add report button and the Edit buttons for any other existing reports are all disabled.