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 cannot create a report for a journey until it has been made active. If you create the report after it has been 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 any contacts started the journey.

1. Select **Journeys** in the navigation menu.
2. Click the name of 1 of the listed journeys.
3. In the journey editor (or read-only page if you do not own the journey), click the **Reports** tab in the panel on the left side.
4. Click the **+Add report** button at the top of the Reports panel. A section for the new report is added to the panel.
5. In the report editing section, enter a name for the report in the **Name** field.
6. (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.

7. (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.

8. Use the **Only count unique contacts** toggle switch to select which type of counting the report should use. (The numbers reported are derived from the journey's components that you will select next.) This selection applies to all components selected for this report. The options are:

   a. **Yes** – The report will display the total number of unique contacts to pass through the components you will select next.

   b. **No** – The report will display the total number of times that the components you will select next have executed, including duplicate contacts.

9. 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.

10. 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** button (trash can icon) to the right of each slot. (You must delete any unused slots.) You can also reorder the slots by clicking and dragging the hamburger button to the left of the slot up or down the list.
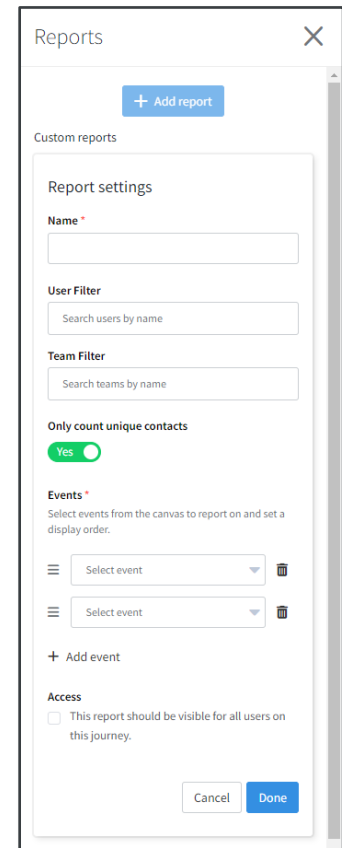
> **Tip**
> These boxes refer to the name defined for each component. When setting up a journey, give each component a unique name to make it easier to discern among different components of the same type when building a report and when viewing the finished journey report. Below is an example of a journey whose components use only default names; it is unclear which option refers to which instance of a component type.
>
>
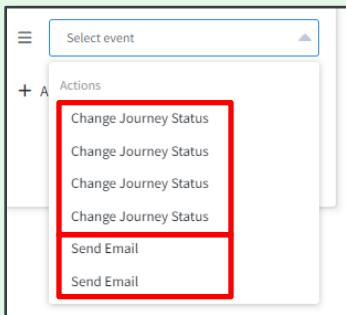
   a. You must include at least one component; otherwise you can select as many or as few components as you want, up to a maximum of all the available components in the journey.

   b. You can select each component only once. Components that have already been added to the report are grayed out in the drop-down list.

11. (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. (The creator of the journey 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.

12. Click the **Done** button at the bottom of the panel. The report editor closes, and the finished report appears in its place.

You can modify or remove a completed report by clicking the **Edit** or **Delete** buttons in its tile, respectively. These changes affect all users with access to 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.
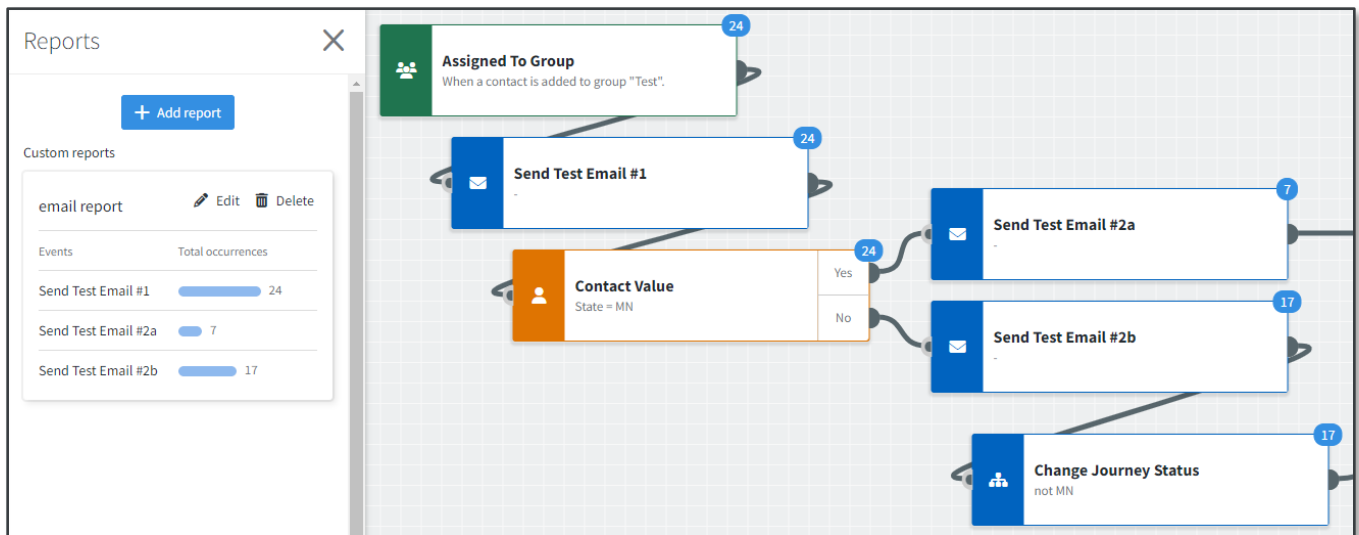
Editing or Deleting an Existing Report

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.

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