temenos

Analytics
JOURNEY MANAGER

VERSION 22.04

TOC

Journey Analytics Overview

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Journey Analytics, formerly known as Transact Insights, is a purpose-built behavioral analytics module that provides additional extensive analytics on your applications hosted on the Temenos Journey Manager (TJM) platform.

Once set up, Journey Analytics aims to assist customers to track the performance of their applications on their Temenos Journey Manager (TJM) platform from an analytical perspective. Journey Analytics provides a wide variety of analytical views that capture completion analysis for one or more applications. As well as these features, Journey Analytics also supports rich filters that allow customers to understand the device type, browser and other attributes of the devices used to complete applications.

Journey Analytics must be enabled for Maestro, Composer or Open UX applications in Journey Manager to be able to collect Journey Analytics data.

A key value Journey Analytics offers is the behavioral analytics to assist our customers to understand user engagement with the form, the effort it takes to submit an application, and where users are abandoning their applications.

These fine-grained metrics help to identify abandonment hotspots in the customer application and further explore problematic fields to:

- Reduce the effort it takes the user to complete an application.
- Improve the user experience and **onboarding** [1] process.
- Optimize the application to drive conversion and completion.
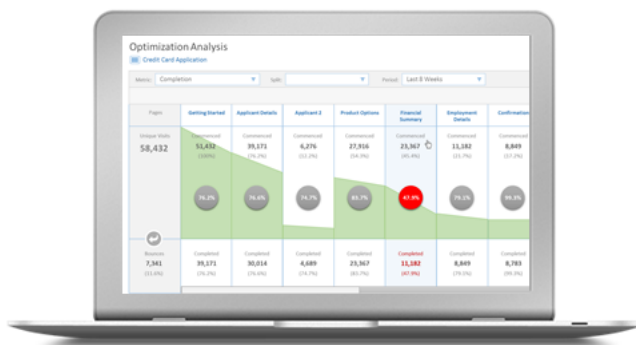
Analytics Views

Journey Analytics now offers eight main analytical views for both application performance analytics and user behavioral analytics:

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[1] The steps required to get a new customer integrated into a new program. These steps may vary business to business.

1. Dashboard View – gives a high-level overview of application performance providing key metrics on completion, device distribution, completion times and recent completion history.

2. Timeline View – provides a trend of application statuses over a selected period. In addition, you can aggregate the data at various levels and split the data by device type, browser, application version and other options.

3. Dropoff View – provides behavioral analytics capturing key insights on user interaction with the application. It includes section and field level metrics that help to identify abandonment hotspots, problematic fields, and application flow.

4. Field Analysis View - provides detailed field-level statistics for each section of the application being analyzed. It also helps to identify abandonment hotspots by aggregating all field level behavioral data for all transactions during the selected time frame. In v18.05 and earlier this view is accessed through the Dropoff View.

5. User Journey View – this view provides a map of custom milestones implemented in the application and how users are progressing through them towards completing the application. It also provides insight into all possible journey paths users are taking to complete transactions, and allows customers to perform segmentation analysis of the users based on the data sent by the Segment APIs from the application form or Journey Manager. Introduced with Journey Manager 18.05.

6. Collaboration Job View - this view uses a node graph to represent the Collaboration Job workflow. It provides a view into key metrics at the job, step, action, section and field level. Introduced with Journey Manager 18.11.

7. Export View - this feature allows you to export analytics reports to CSV, with the ability to select the granularity of your reports and retrieve exports for multiple applications in a single file. Introduced with Journey Manager 19.05.

8. Custom Reports View - this view provides a customizable dashboard that makes it easy to compare the performance of your application versions, across many different metrics in a single view. Multiple analytics can be displayed in the form of report cards that can be arranged and resized in any location on the screen. Introduced with Journey Manager 19.05.

Journey Analytics User Interface

The Journey Analytics User Interface is common to all analytical views. Use the interface to select the required analysis views, select the timeframe for analysis, and set global filters and preferences.

From Journey Manager 18.11 a new user interface called the Visualizer was introduced, which is a modern user interface that brings together modern best practices to deliver a refreshed user experience. For customers on Journey Manager 18.11 and later, all analytical views will be seen through this refreshed user interface. For customers on Journey Manager 18.05 and earlier, the original legacy Dashboard user interface will display. Examples of both user interfaces are available in this documentation.

Terminology

Journey Manager forms or applications designed in Maestro, Composer or Open UX are referred to as applications in Journey Analytics, and once a user submits the application in the browser it becomes a completed transaction in Journey Manager.

Transaction Status

Transactions on Journey Manager may progress through any of the following statuses; Open, Bounced, Started, Saved, Completed, Abandoned.

Strict No PII Policy

Transactional data entered by users is not stored in Journey Analytics, however, Journey Analytics does store information about the transaction status and user behavior events from the application. This behavioral data is stored and used to populate all the Journey Analytics analysis views.

The transaction status and user behavior events DO NOT include any user input data itself and hence Journey Analytics DOES NOT collect any **Personally Identifiable Information**[1] (PII). The Journey Analytics service has been explicitly designed to NOT record or store user input data and PII.

You may verify this by using the browser's F12 tool to monitor the network traffic of an Journey Analytics enabled application. Journey Analytics employs all possible mechanisms and strategies to NOT store data relating to PII. For more information, see Journey Analytics Data Privacy and Security.

Architecture

Journey Analytics is built and hosted on the Google Cloud Platform (GCP) infrastructure. It is a fully managed service built using the GCP. The image below describes the high-level architecture of Journey Analytics and how it fits into the Journey platform.

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[1]Personally identifiable information (PII) is any data that could potentially identify a specific individual. Any information that can be used to distinguish one person from another and can be used for de-anonymizing anonymous data can be considered PII.
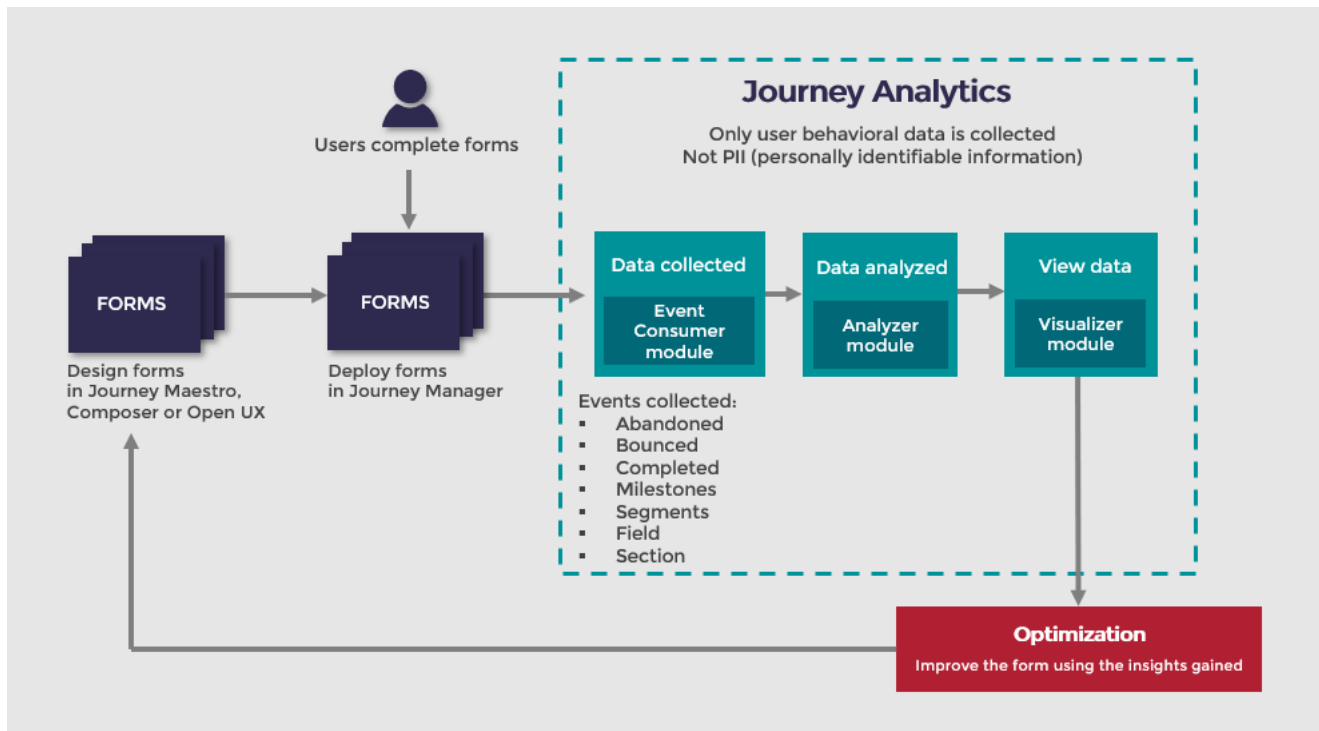
Journey Analytics collects events from two sources – Journey Manager and the browser where the application is rendered.

Journey Manager sends transaction status events and applications rendered in the browser send user interaction events. These two sources support the detailed statistical analysis of user behavior within applications.

The user interaction events from the browser include information such as - field visit, field completion, validation error, section navigation etc. These analytical events are directly comparable to the Google Analytics or Adobe Analytics events recorded by these analytics services. For more information, see Journey Analytics Data Privacy and Security.

Setup and User Administration

Some setup and user administration is required to use Journey Analytics. Users must have the Journey Analytics user role and space added to their Journey Manager user accounts to be able to access Journey Analytics.

Journey Analytics Open UX Support

Journey Analytics supports the Open UX framework via a separate npm package. For implementation details and an example Open UX React project, see Open UX.

Journey Analytics Features

Journey Analytics | Analytics User | Latest Version

Journey Analytics comes packed with a wide range of features empowering you to analyze complex customer onboarding and user journey solutions. The main product features have now become core functionality in the latest cloud-hosted version. Click on each feature to learn more.

Main Features

- The Dashboard provides a high-level overview of application performance.
- View an individual form's transaction metrics and better understand completion rates with Dropoff.
- Identify abandonment hotspots and trends in Field Analysis - with detailed field-level statistics.
- Visualize the User Journey milestones while segmenting users.
- Use the Timeline to compare application statuses over time.
- Custom Reports provides a customizable dashboard for many different metrics in a single view.
- Visualize a Collaboration Job and view it's key metrics for the job, step, action, section or field.
- Export analytics reports to CSV.
- Segmentation analysis to help understand the behavior of specific groups of users.
- Follow significant events in the user's journey through Custom Milestones.

Features by Release

Each release of Journey Analytics is hosted with new features and bug fixes to provide you with the best-in-class software and to accelerate business agility and improvements across the board. All cloud-hosted customers are automatically provided with the latest release.

The key features for each major release of Journey Analytics are listed below. Click on each release number to view the complete release notes and learn about all features and bug fixes.

22.04

Release Key Features	Description
Scope Selector	The Scope Selector now displays the form code with each form making it easier to correctly identify the form you want to analyse.
Dashboard View improvements	New tooltips added to the Dashboard View.
Open UX Support	Open UX support has been enhanced to provide Open UX applications with full analytics capabilities. A sample project is now available from the Downloads section.

For more information see Analytics 22.04 Release Notes.

21.11

Release Key Features	Description
Scope Selector	Custom period date selector displays a single view for start and end date selection.
	Today option provided for the period with Last Day being renamed to Yesterday.
	For multi-organisation clients the organisation name is displayed with the form name in the form version selector.
	Sorting forms in the form version selector is also available for multi-organisation clients. Forms can be sorted by organisation name or form name.
Timeline View improvements	The Timeline View now provides users more options for aggregating data. The tooltip displayed on hover of the bar chart has also been improved to order the colour sequence to match the bar chart.
User Journey View segmentation chart	The User Journey View segmentation chart has been extended to display ten segmentation values compared to the previous five.

For more information see Analytics 21.11 Release Notes.

21.05

Release Key Features	Description
Custom Reports View	A/B Testing was renamed to Custom Reports.
	This view is a customizable dashboard that makes it easy to compare the performance of your application versions, across many different metrics in a single view. Additional reports have been added to the view, such as:
	Best, Worst, Avg - gauge the best, worst and average time taken to complete applications within the selected scope.
	Completion Rate - examine application performance in terms of user completion for the selected scope in a bar chart.
	Duration Summary - compare and sort the best, worst, average, and median times to complete each version in the selected scope using a table.
	Median Time - compare the median time to complete each version in the selected scope as a bar chart.
	Milestone Funnel - compare standard and custom milestone hit rates for the selected scope with a bar chart.

Section Completion - see completion across sections for the selected scope using a line graph.

Section Summary - compare and sort by section-level stats for each version in the selected scope in a table.

Segment Split - discover the breakdown of values of a segment type for all transactions within the selected scope using a pie chart.

Segment Switch - examine how users traverse values of a segment type for all transactions within the selected scope using a sankey graph.

Session Map - investigate the number of sessions occurring per country for the selected scope using a choropleth graph.

Top Fields - compare and sort by field-level stats for each version in the selected scope in a table.

Transaction Summary - compare Transaction Statuses for the selected scope using this bar chart.

Improved analysis and metric readability	Tooltip enhancements for the Field Analysis and Dropoff Views to provide more detailed statistics.

For more information see Analytics 21.05 Release Notes.

20.05

Release Key Features	Description
Milestone Funnel report	A new Milestone Funnel report was introduced to the A/B Testing View. Use this report to understand how milestones are encountered across one or more applications. The chart is a bar chart where each bar represents the number of milestone transactions.
Springboard	Provided built-in analytics used by the Springboard solutions.

For more information see Analytics 20.05 Release Notes.

19.11

Release Key Features	Description
New reports available in the A/B Testing View	Segment Split, Duration Summary, Best, Worst Average Duration, and Sessions Map. Also rates have been added to the Segment Switch report.
Other enhancements	Transaction Recovery Support - Query changes were made to the Journey Analytics backend to support Workspace transaction recovery. This means that Abandoned transactions that were subsequently completed (recovered), will be reflected accurately in the Journey Analytics views.
	Help Tooltips - We improved help tooltips by ensuring a consistent look and feel to tooltips throughout the application. We also added more clarity to some areas via help text, namely the Period selector.

Export Column Ordering - This new enhancement ensures that the order in which metrics (columns) are selected in the Export View UI, is reflected in the downloaded CSV.

For more information see Analytics 19.11 Release Notes.

19.05

Release Key Features	Description
A/B Testing View	The new Journey Analytics A/B Testing View brings a customizable dashboard that makes it easy to compare the performance of your application versions, across many different metrics in a single view.
Custom Data Export	The new Custom Data Export allows you to export analytics reports to CSV with the ability to select the granularity of your reports and retrieve exports for multiple applications in a single file.
Additional enhancements	Segment filtering - Added to the Global Filter Panel to allow users to view different segments of their analytics data.
	Job filtering - Added to the Cohorts filter on the Global Filter Panel to allow users to filter by one or more collaboration jobs, or versions of jobs.
	Last Analysis - Added to the Journey Analytics banner to show the date and time the analytics data was last consolidated and updated. It typically runs hourly.

For more information see Analytics 19.05 Release Notes.

18.11

Release Key Features	Description
Visualizer user interface	Insights has a brand-new user interface that brings together modern best practices to deliver a refreshed user experience. This was achieved by a major redesign of the Insights' frontend.
	This new user interface is called Visualizer, and will replace the Dashboard user interface from previous versions.
Open UX support	Insights extends support for event collection to include Open UX applications, including Out Of The Box React implementations, such as Springboard implementations and framework agnostic wrappers for ECCL integration.
	This means that open UX applications can now be analyzed using Insights, the same way Maestro applications can be analyzed.

| Collaboration Job support | Insights now provides Collaboration Job analytics to monitor workflow level analytics. |

For more information see Analytics 18.11 Release Notes.

Next, learn more about Manager features.

▍Setup

Journey Analytics | Analytics User | Latest Version

To successfully setup Journey Analytics, you must first send an Journey Analytics provisioning request to your Account Manager. Once you have sent this request, your Account Manager will collaborate with the Journey Analytics and Cloud-hosting support teams to complete the following steps:

1. Raise a service request on ACS and select Journey Analytics Provisioning request as the request type.
2. Make sure the customer meets the following upgrade requirements:
   (* Upgrading to the latest GA version of Journey Manager, Composer / Maestro is highly recommended to take advantage of many of the features of Journey Analytics)
   - Journey Manager 5.0.7 or higher deployed on their system.
   - Composer forms published with Composer 4.4 or above.
   - Maestro forms published with Maestro 5.1 or above.
3. If the customer Journey Manager deployment is on-premise, follow the steps below, otherwise ignore this step:
- Provide public facing Journey Manager URLs to cloudhosting-support @avoka.com or update the service request on ACS.
- Make sure the customer's firewall is configured to allow their Journey Manager environment to make outbound calls to the following URLs:
- https://eventconsumer-dot-transact-insights.appspot.com
- https://dataprovider-dot-transact-insights.appspot.com
- https://apiserver-dot-transact-insights.appspot.com
- https://dashboard-dot-transact-insights.appspot.com
- https://accounts.google.com
- https://visualiser-dot-transact-insights.appspot.com
- https://oauth2.googleapis.com
- For all internal users who need access to Journey Analytics UI, their machine should be able to make outbound calls to the following URLs:
- The on-premises Journey Manager URL
- https://dashboard-dot-transact-insights.appspot.com
4. For all internal users who test applications (rendering forms in the browser to generate Journey Analytics data), their machine should be able to make outbound calls to the following URLs:
   - https://eventconsumer-dot-transact-insights.appspot.com
   - https://accounts.google.com
5. The Cloud-hosting support team will provision Journey Analytics on the Google Cloud Project (GCP) that Insights uses as its backend. For each customer, the Cloud hosting support team will create a dedicated

project on GCP and link it to their corresponding Journey Analytics instances.

6. If the customer is using Composer forms, contact insights-support@avoka.com to get the latest ti-support.js file and deploy it to the Manager environment. Please refer to the Deploying ti-support on Composer page for instructions on how to complete this step. The Cloud-hosting support team can only assist with this step when working with on-cloud deployments.

   This step can be skipped if the application is already built with Composer's Insights Data pack. Note that, the ability to send custom Milestones and Segment events from the application is only available through Composer's Insights Data pack.

7. At this stage, the Insights provisioning process is complete. As a next step, for better readability of analytics data on Insights, it is recommended that you configure each field of a Maestro, Composer or Open UX form with a Transact Insights Field Name and publish/build the form.

- In Maestro, you can edit the Transact **Insights Field Name** property under the **Integration** tab of each field.
- In Composer:
  - Navigate to the Bulk Editor and click the **Configure** button.
  - Search for the **Insights Field Name** property.
  - Add the **Insights Field Name** property and **Save** the configuration.
  - **Insights Field Name** column appears in the bulk editor screen. Set the Insights Field Name for each field.

Once the above tasks have been completed, you are ready to enable Insights on forms. Once enabled, data will start flowing through to Journey Analytics as forms are rendered by users.

> Journey Analytics may show errors when there is no data in the database. It may sometimes take up to 1 hour for the data to be reflected on Journey Analytics. Usually, it takes 10-20 mins.

Next, learn how to enable Journey Analytics for Maestro applications.

Enable Applications to Collect Analytics

Journey Analytics | Analytics User ⊓ System Manager / DevOps | Latest Version

Journey Analytics collects data about transactions from any application, designed in Maestro, Composer or Open UX, that has Journey Analytics enabled.

To enable Journey Analytics on an application, follow the steps below:

1. Log in to Journey Manager.

2. Select **Forms > Forms**.

3. Select the form where Journey Analytics will be enabled and click **Edit**.

4. Switch to the **Details** tab. For more information, see how to configure form details.

5. Select the **Transact Insights** checkbox to enable the selected form with Journey Analytics.

6. Click **Save** to update the changes.

> Journey Analytics can be enabled or disabled at any point in time. The data will only be collected for the duration of time when an active form is enabled with Journey Analytics.

The **Transact Insights** checkbox may be deselected when you migrate between environments. If you import the form into another Journey Manager environment such as production, where Journey Analytics is enabled, from an environment that has Journey Analytics disabled, the checkbox may be disabled, and Journey Analytics analytics will not be gathered.

Always double check the **Transact Insights** checkbox after exporting and importing between Journey Manager environments, and update the checkbox on the imported form if required.

User Interface Overview

Journey Analytics | Analytics User | Latest Version
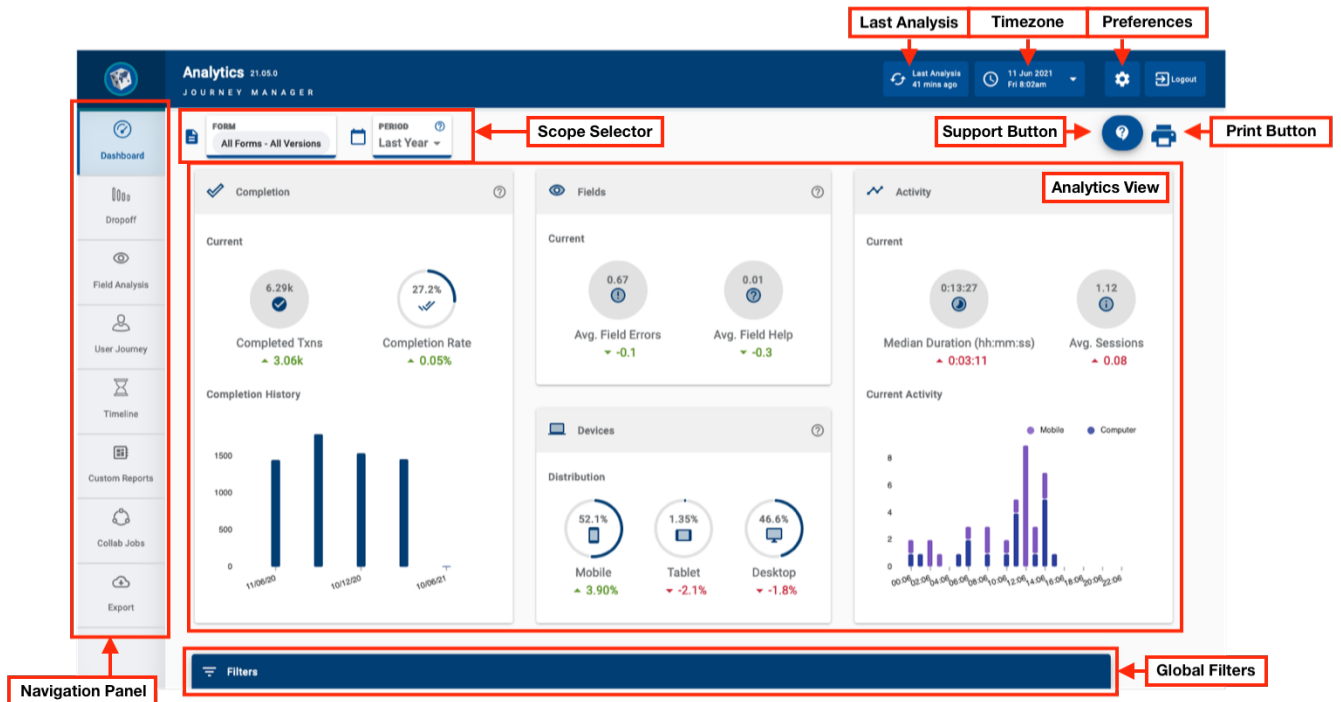
When you have successfully logged into Journey Analytics, the user interface is displayed. User interface components are:

- Navigation Panel
- Scope Selector
- Last Analysis
- Timezone
- Preferences
- Support button
- Print button
- Analytics View
- Global Filters

Navigation Panel

Use the Navigation Panel to select which analytics view displays.

Scope Selector

Use these two dropdowns to select which forms or applications, and the time period, to analyse in Journey Analytics views. Learn more about the Scope Selector.

Last Analysis

Refer to this indicator to determine the freshness of the current data used in all views. Typically, user behaviour data is updated hourly for all views. Learn more about the Last Analysis indicator.

Timezone

Use this dropdown to select the timezone from which to view transactions. Typically, users should set this to their current timezone or the timezone where applicants are located. Learn more about the Timezone.

Preferences

Journey Analytics Administrators can use these options to configure Segment Whitelist entries so that the data can be captured in applicant transactions. Learn more about Preferences.

Support button

Use this button to get documentation about a particular analytics view or to suggest an enhancement.

Print button

Use this button to get a printer-friendly output of Journey Analytics views which can be saved to PDF or as a hard copy. Learn about Print Support.

Analytics Views

The Analytics view is the main section of the user interface, and by default, the Dashboard View will display. Each view leverages different charts and metrics for a particular type of analysis. All views are visible on the Navigation Panel and include:

- Dashboard
- Dropoff
- Field Analysis
- User Journeys
- Timeline
- Custom Reports
- Collab Jobs
- Export

Global Filters

Use these options to apply whitelist or blacklist filters to limit which types of transactions are in scope for analysis. Learn more about Global Filters.

Scope Selector

Journey Analytics | Analytics User | Latest Version

The Journey Analytics scope selector allows users to select *what* and *when* to analyse. It includes a dropdown to let you select the application and version or job. It also includes a second dropdown which is used to select the date range.
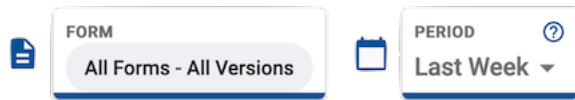
Select form or job scope

Some views are capable of displaying multiple forms (applications) and versions. Whereas, other views only show data for a single form and version. Use the steps below to select the scope:
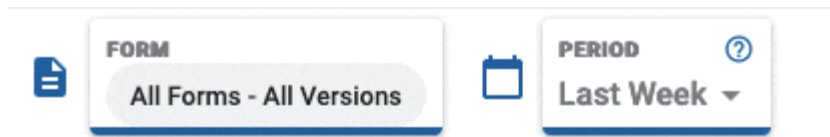
Select multiple forms or jobs

Select single form or job

To select multiple applications or jobs, or multiple versions in a Journey Analytics view:

1. Click on the form (application) or job dropdown.

2. Click all the versions you want to analyze. If there is only one version, simply click on it.

3. Click **OK**.
Click the image to view animated example

FORM

All Forms - All Versions

PERIOD ⑦

Last Week ▾

To select a single application or job in a Journey Analytics view:

1. Click on the form (application) or job dropdown.

2. Click the version you want to analyze. If there is only one version, simply click on it.

3. Click **OK**.
Click the image to view animated example

Select All, Clear All and Cancel
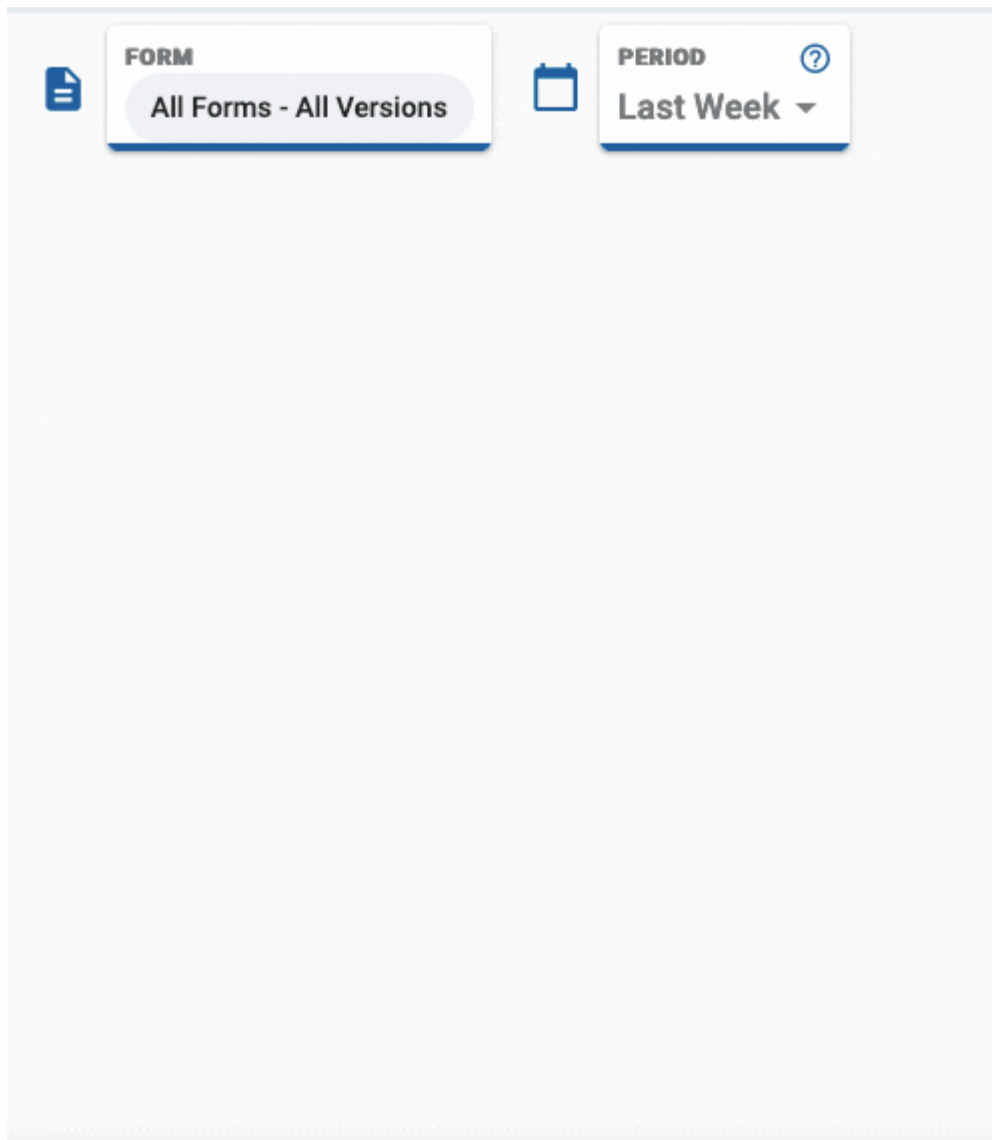
Click **Select All** to select every form or job and all of their versions.

Click **Clear All** to clear the current selection and make another selection, or click **Cancel** to leave the scope as is.

Sorting

If multiple organizations are accessible for the current user, the scope selector will show the Org Name above each form entry. In addition, sorting buttons appear at the top of the scope selector.

- Click a toggle button option to sort the list alphabetically by Form or Org name.
- Use the **Cancel** button if you wish to see the default sort order.
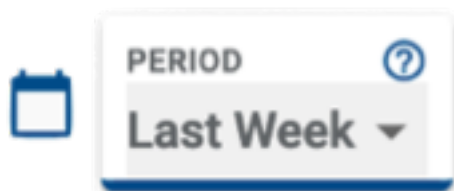
Form code

Beneath the form name, the form code is displayed which allows for easier identification of the correct form.

Select the date range scope

As part of selecting the scope, you can also adjust the date range using the Period dropdown.

1. Click on the Period Selector.

2. Click on the date range you want to analyze. Use the **Custom** option to set the range manually.

3. Click **OK**.

As Journey Analytics is a near real-time analysis tool, user transaction data is regularly aggregated and is not immediately available. The delay before data from new transactions becomes available for visualization can be up to 24 hours after the transaction is completed.

To minimize the impact of this delay on your analysis, previous duration options are recommended as they do not include data from today. If you need to inspect transactions from today, use the Last Analysis to determine the freshness of available data.

Period duration options

Use the table to understand each date range available:

Option	Description	Result - if today is 10th April 2021
Today	Use this option to view analyzed transactions that started today.	From 10th April 2021 (12 am) to now is shown. Use Last Analysis to determine when analysis last ran.
Yesterday	Use this option to view analyzed transactions that started yesterday.	From 9th April 2021 (12 am) to 9th April 2021 (11.59 pm) is shown.
Last Week	Use this option to view analyzed transactions that started within the week ending yesterday.	From 3rd April 2021 (12 am) to 9th April 2021 (11.59 pm) is shown.
Last Fortnight	Use this option to view analyzed transactions that started within the fortnight ending yesterday.	From 26th March 2021 (12 am) to 9th April 2021 (11.59 pm) is shown.
Last Month	Use this option to view analyzed transactions that started within the month ending yesterday.	From 9th March 2021 (12 am) to 9th April 2021 (11.59 pm) is shown.
Last Quarter	Use this option to view analyzed transactions that started within the previous quarter ending yesterday.	From 9th January 2021 (12 am) to 9th April 2021 (11.59 pm) is shown.
Last Year	Use this option to view analyzed transactions that started within the previous year ending yesterday.	From 9th April 2020 (12 am) to 9th April 2021 (11.59 pm) is shown.

Custom	Select the individual start and end dates from the calendars.	From start date (12 am) to end date (11.59 pm) is shown.

Timezone can affect the actual window of time selected. For example, a transaction from today in Australia (UTC +10hrs) will not be available if the timezone is set to Hawaii Standard Time (UTC -10hrs). In scenarios such as this, it's recommended to set the timezone to where the transactions originated.

Last Analysis

Journey Analytics | Analytics User | Latest Version

The Journey Analytics Last Analysis indicator displays the time elapsed since transactional data was analysed. It is a way to determine the freshness of the current data in all views.

How it works

The raw transactional data from user interactions are periodically analysed to produce an aggregated group of tables for data visualization purposes. All views in Journey Analytics use the analysed results for displaying charts and statistics.

Analysis is a scheduled job that occurs roughly every hour. For new forms and versions, updates can take 24hrs from the time of the first transaction before appearing in Journey Analytics.

Next steps

Learn how to set the timezone.

Timezone

Journey Analytics | Analytics User | Latest Version

The Journey Analytics timezone dropdown allows you to select the timezone from which to view transactions. The selected timezone will impact all views as well as the span of time used when setting the Period.
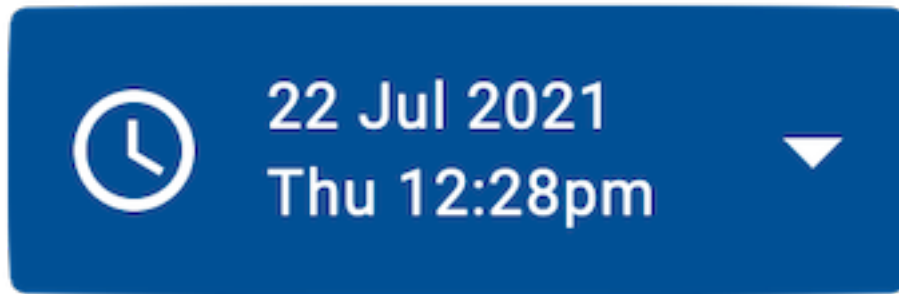
Select the timezone

Typically, you'll want to set this value to your current timezone. It can also be useful to adjust to the timezone where applicants are located.

Latest **Legacy** To select the timezone, use the steps below:

1.   Click the timezone dropdown to display available options.
2. Select your desired timezone from the list of options.
3. The current date and time for the selected timezone is displayed.

In the legacy Journey Analytics Dashboard, the timezone is configured in the Preferences on the Journey Analytics banner.

1. Select **Preferences** from the Journey Analytics User Interface.
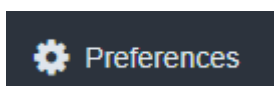
2. Select the **General** tab.
3. Select your preferred timezone from the **Time Zone** dropdown list.

Preferences ✖

General   Blacklist filters (user)   Whitelist segments

Time Zone

| GMT +10:00 Australia/Sydney ▼ | Reset |

GMT +09:30 Australia/Darwin
GMT +09:30 Australia/North
GMT +09:30 Australia/South
GMT +09:30 Australia/Yancowinna
GMT +10:00 Antarctica/Macquarie
GMT +10:00 Asia/Magadan
GMT +10:00 Asia/Srednekolymsk
GMT +10:00 Australia/ACT
GMT +10:00 Australia/Brisbane
GMT +10:00 Australia/Canberra
GMT +10:00 Australia/Currie
GMT +10:00 Australia/Hobart
GMT +10:00 Australia/LHI
GMT +10:00 Australia/Lindeman
GMT +10:00 Australia/Lord Howe
GMT +10:00 Australia/Melbourne
GMT +10:00 Australia/NSW
GMT +10:00 Australia/Queensland
GMT +10:00 Australia/Sydney

OK

4. Click **OK**.

5. Click **Reset** to reset the timezone to the current Journey Manager server's timezone.

Timezone can affect the actual window of time selected. For example, a transaction from today in Australia (UTC +10hrs) will not be available if the timezone is set to Hawaii Standard Time (UTC -10hrs). In scenarios such as this, it's recommended to set the timezone to where the transactions originated.

Preferences

Journey Analytics | Analytics User | Latest Version

The Journey Analytics preferences are used to configure the segment whitelist. Preferences can be opened by clicking the settings cog in the top right of the user interface.

Segment Whitelist

Within Preferences, the segment whitelist determines which segmentation data can be stored in Journey Analytics datasets. It is designed to help prevent inadvertent storage of Personally Identifiable Information (PII) in the Journey Analytics database.

In order to collect segment data for Journey Analytics purposes, the segments and their values must be whitelisted. Any incoming segment data which is not whitelisted is discarded and is **not** stored.

For more information on Personally Identifiable Information (PII), see Insights Data Privacy and Security.

The segment whitelist is shared across all Journey Manager environments (DEV, UAT, TEST, STAGING, PROD). Changes to the segment whitelist in one environment will be reflected in all environments. You will also need Journey Analytics Administrator access to modify the segment whitelist.

Latest   Legacy   **Modify the segment whitelist**

Add and amend entries using the steps below:

1. Click the settings cog to open the segment whitelist.
2. Click **Add Segment** to add new entries.
3. In the text input, type the name of the segment type.
4. Select whether to allow Discrete or a Range of entries as segment values.
5. Input all the expected segment values, or a numeric range, to the whitelist.
6. Click **Apply** to save entries.

Segment Whitelist Entries

To remove an entry, use the bin button.

To cancel all modifications, before clicking **Apply**, click anywhere outside the preferences dialogue.

Modify the segment whitelist

1. Select **Preferences** from the Journey Analytics User Interface.
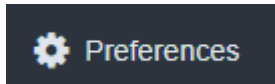
2. Select the **whitelist segments** tab.

3. Click**Add Segment.**

4. Enter the segment name in the Segmentation field.

5. In the Segment Type dropdown, select either **Discrete** or **Range** and enter the values.

   - For Discrete: Enter one or more Discrete Values

   - For Range: Enter the Minimum and Maximum Values allowed to be stored in the Journey Analytics data-base

6. Click **OK** or **Apply**.

7. Validation of the values and the segmentation names occur and any errors are displayed in red. Green ticks display on the fields to indicate the validation is successful.

8. Continue to add more than one segment if required.

9. To remove a whitelisted segment, simply click the trashcan icon.

Blacklist Filter

The Blacklist filter will ensure that any transactions that come from a blacklisted source will not be included in any Journey Analytics data analysis. To filter out a specific source of data you can blacklist a specific browser or IP address. You can also edit or remove blacklist filters.

To add or edit a Blacklist filter:

1. Select **Preferences** from the Journey Analytics User Interface.
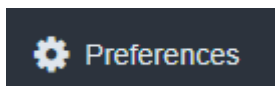
2. Select the **Blacklist filters (user)** tab.

3. Click **Add Filter**.

4. Click the **Filter type** dropdown menu.

5. Select the **IP Address** or **Browser** option.

6. Enter either an IP Address or select a browser from the drop-down list.

7. Click **OK**.

8. To apply more than one blacklist filter, continue to click **Add Filter** until they are all configured.

9. To remove a filter, simply click on the trashcan icon.

For more information on sending segments, see How to Send Custom Milestones and Segments.

> To avoid losing any segmentation data, add them to the segment whitelist **prior** to making the application (form) available to users.

Print Support

Journey Analytics | Analytics User | Latest Version

The Journey Analytics print and PDF support provides a better way to extract charts and graphs to hard-copy or soft-copy. The button appears in the top right corner and leverages the browser's built-in print capability.

The print output is similar to a screenshot of the current view. The output also contains an appendix which includes:

- The name of the view printed.
- A timestamp of when the printout was generated.
- Information about the selected scope and any Global Filters applied.

> Printing will use the browser window width to determine chart boundaries. If you find some charts are cut off or do not print as expected, adjust the width of the browser.

Print a view

To print the current view use the following steps:

1. Click the print icon button.
2. Input a title to use for the printout.
3. Click **Print** to open the browser print options.
4. Save or print the file.

Overview of all Credit Card App versions

Completion

Current

24.2k
53.5%

Completed Txns Completion Rate
▲ 24.2k ▲ 53.5%

Completion History

5000
4000
3000
2000
1000
0

Fields

Current

0.33
0.16

Avg. Field Errors Avg. Field Help
▲ 0.33 ▲ 0.16

Devices

Distribution

15.0%
1.35%
83.7%

Mobile Tablet Desktop
▲ 15.0% ▲ 1.35% ▲ 83.7%

Activity

Current

0:16:38
1.45

Median Duration Avg.
(hh:mm:ss) Sessions
▲ 0:16:38 ▲ 1.45

Current Activity

No results found for the selected
filters/scope

Page
Dashboard
Print timestamp
July 22nd 2021, 3:10:43 pm
Period
Custom
Start Date
July 12, 2017
End Date

4000

Collab Jobs

Filters

Print 2 sheets of paper

Destination

Save to PDF

Orientation

Portrait Landscape

Pages

All

Color mode

Color

Fewer settings

Paper size

US Letter

Scale

○ Fit to page width
○ Scale 100

Pages per sheet

1

Cancel Save

Depending on the browser and operating system, printing options may differ. For most browsers, users are encouraged to ensure **Background graphics** in printing preferences is checked.

Having **Background graphics** unchecked might hide some graphical information from being printed.

▌Global Filters

Journey Analytics | Analytics User | Latest Version

Global Filters allow you to choose filters to define which transactions to analyse within Journey Analytics. Any global filters applied will impact all analytics views. The behavior of global filters and how to apply them are described below.

<u>Latest</u> Legacy

The filter allows you to determine which transactions are used in visualizations for all views. Constraints can be in the form of either a whitelist or a blacklist:

- The whitelist filter values will filter all views to only show transactions which match the filters.
- Blacklisted values will result in views only showing transactions which do not match the filter values.

Applying filters

To add global filters, use the following steps:

1. Determine whether you will create a whitelist (show only matching transactions) or blacklist (show non-matching transactions) filter.
2. Click the **Whitelist** or **Blacklist** tab based on your filtering strategy.
3. Click any of the filter dropdowns you wish to apply.
4. Select the value to filter. You can manually input a filter value with your keyboard or use the dropdown options to select a value.
5. Click **Apply** to refresh the analytics views with global filters applied.

Selecting more than one filter value will restrict transactions to only those which match all selected values. The filters, in this way, are applied in an additive manner.

How it works

Global filters allow you to focus on particular transactions and to filter using a range of categories:

- Cohorts - filter transactions for certain user groups. Read more about milestones, segments and Collaboration Jobs.
- Client Device - filter transactions based on user device information.
- Location - filter transactions based on user locations.

> To only show trusted browser transactions, you could:
>
> - Add robot and crawler browser types to the blacklist to remove any such transactions from view.
> - Alternatively, you can whitelist only Chrome browser transactions to only show data for transactions from users on Chrome.
>
> In this way, the filters are flexible so you can exclude or include transactions as needed.
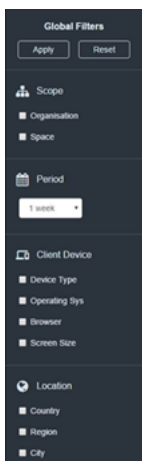
The filters available allow you to focus on particular transactions and to filter by a range of categories which include:

- Scope
- Period
- Client Device
- Location
- Cohorts

Apply and reset global filters

To apply the global filters you selected, click **Apply**. The selected filters will then be applied across all applications visible in the analytics views.

To reset the global filters, click **Reset**. This clears the global filters and resets the time period to 1 week.

To reset the global filters, simply click **Apply** again.

Scope filter

In v18.05 the Scope filter allows you to choose applications from available organizations and/or spaces.

To filter by scope:

1. Select either the **Organisation** or **Space** checkbox.
2. Select the organizations or spaces you want to filter by.
3. Click **Apply**.

Consider the following:

- When no organization or space is selected, all applications accessible to your Insights user account will become visible.
- When one or more organization is selected, only applications from those selected organizations will be displayed.
- When an organization is selected, spaces that are a part of that selected organization will become visible to select in the Space option.
- When one or more spaces are selected, only applications from those selected spaces will be displayed.

The Scope filter is not required, as all organizations and spaces the user has access to in Journey Manager will be available for analysis.

Period filter

The Period filter allows you to choose a specific time frame where transactions associated with the selected applications were undertaken. The time period will remain visible on the top right-hand corner in all views of Journey Analytics.

To select the date range:

1. Click on the Period filter.
2. Click on the date range you want to analyze.
3. Click **Apply**.

To select a custom timeframe:

1. Click on the Period filter.
2. Select **Custom**.

3. Select your **Start date** and **End date**.

4. Click **Apply**.

> The pre-defined period options are calculated backwards from 11.59 pm of the day prior to the current date.

Client Device filter

Filtering based on the client device allows you to analyze data coming from specific devices and configurations. This data provides information on how transaction data from different device configurations compare against one another.

For example, you may want to only show transactions completed using a mobile phone. To do this, filter by the Mobile Phone Device Type.

To filter by device:

1. Select either the **Operating System**, **Device Type**, **Screen Size** or **Browser** checkbox.

2. Select the options you want to filter by.

3. Click **Apply**.

Location filter

The Location filter allows you to filter transaction data coming from specific geographies, such as Country, Region, or City.

To filter by location:

1. Select either the **Country**, **City** or **Region** checkbox.

2. Select the locations you want to filter by.

3. Click **Apply**.

> - When one or more Countries are selected, all regions for the selected Countries will appear under the Region filter. You may then select one or more regions from the list.
> - When filtering by City, manually enter the name of the city. City names are case-insensitive.

Cohorts filter

| 18.05 & Earlier

The Cohorts filter allows you to filter transactions based on specific custom milestones that have been identified and configured in Maestro, Composer or Journey Manager.

From v18.11 you can also filter by Segments, that have been configured and addedd to the Segment Whitelist.

From v19.05 you can also filter by Collaboration Jobs.

Custom milestones are preconfigured events that occur in a transaction. To filter by milestone is to filter by a specific event that occurred in a transaction.

To filter by milestones:

1. Select the **Milestone**, **Segments** or **Jobs** checkbox to display the a dropdown list.
2. Select the milestones, segments or jobs you want to filter by.
3. Click **Apply**.

Selecting more than one milestone in the Filter will only include transactions that contain **all** selected milestones. For example, in an application with configured milestones called **Prefilled Info** and **E-Signed**, that trigger if the user chooses to auto-populate form details or sign electronically, choosing both milestones in the Filter will display only the transactions that have both **Prefill Info** AND **E-Signed** milestones.

| 18.11 & Higher

Segments are custom events or groups that are preconfigured and sent from a Maestro or Composer application, or from a groovy/fluent service on Journey Manager to Journey Analytics. Each segment event lets Journey Analytics know to which segment or group a transaction belongs to. A transaction can only belong to one segment or group. For instance, transactions can be grouped by gender, age or age brackets, products selected, or Exchange packages used to complete an application, such as the Mitek drivers license scan.

To filter by segments:

1. Select **Segments** to display the segments dropdown list.
2. Select the segments you want to filter by.
3. Click **Apply**.

Dashboard View

Journey Analytics | Analytics User | Latest Version

The Journey Analytics Dashboard View displays an overview of transactions associated with the selected applications for a specific time period.

To display the Dashboard View:

1. Select **Dashboard** from the Navigation Panel.

2. Select the application and time period to analyze.

3. The Dashboard View displays.

Latest   Legacy
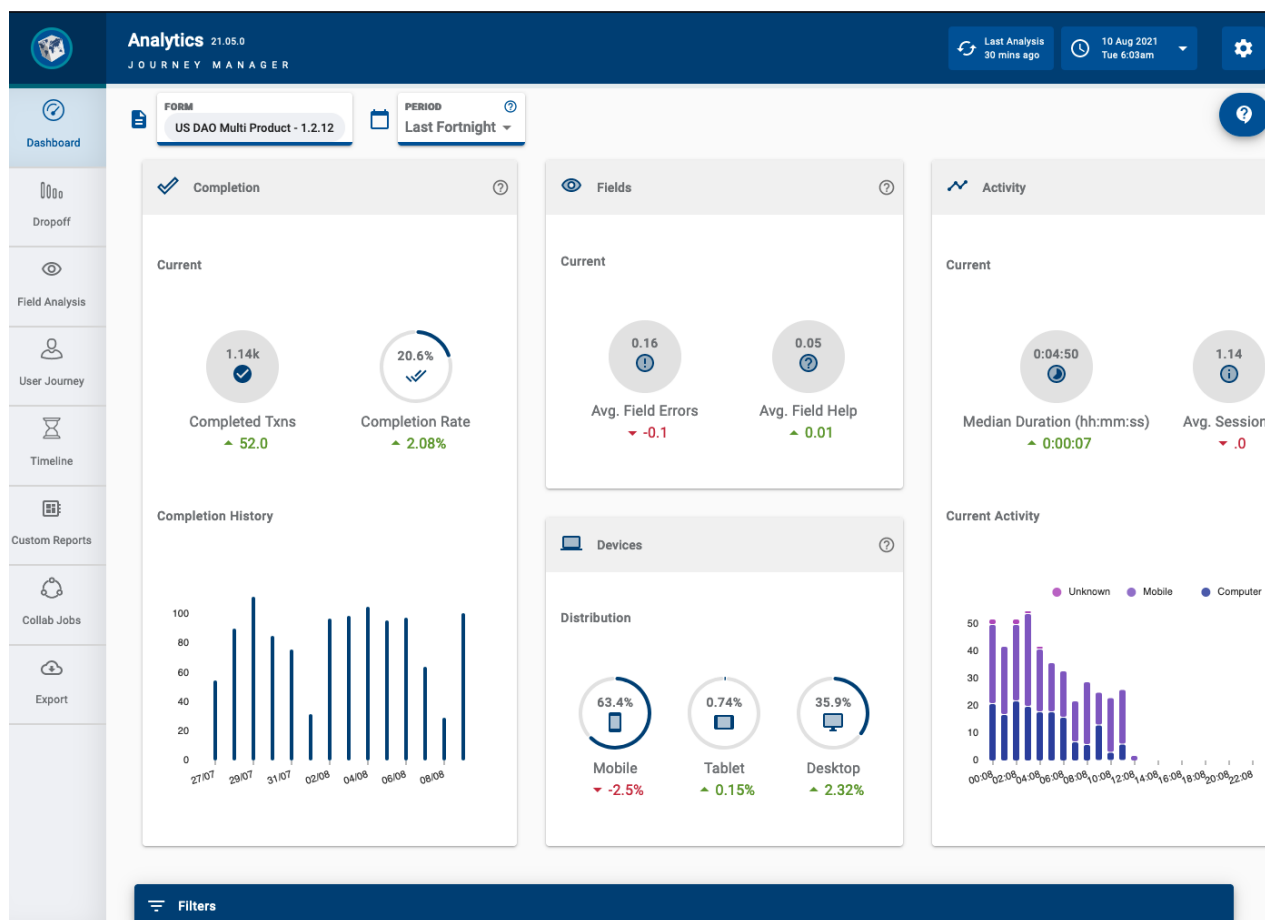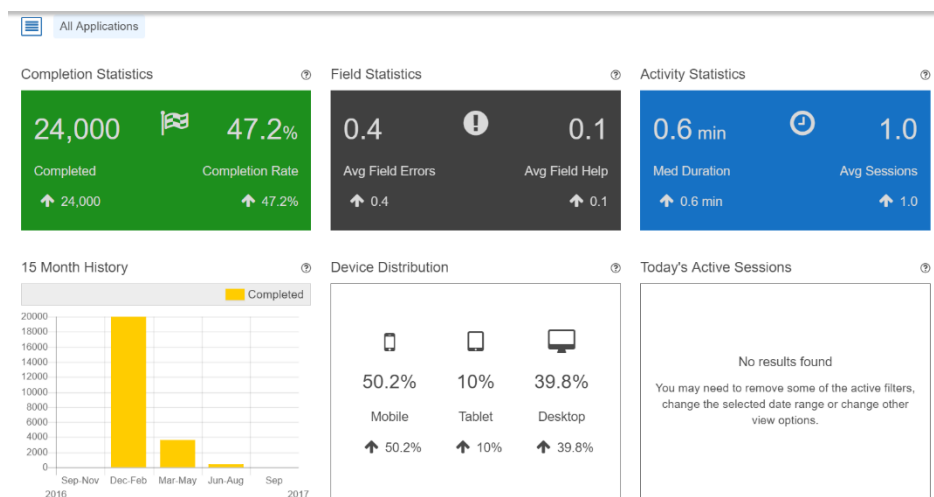
The Dashboard is made up of the following tiles:

- Completion Statistics.
- Field Statistics.
- Activity Statistics.
- Application History.
- Device Distribution.
- Today's Active Sessions.

Help Icon

Each tile in the Dashboard contains a help icon ⑦, click the help icon on a tile to provide an overview of the statistics contained in that tile. The image below displays the contents of the Completed Statistics help icon. This information helps to identify and define the metric being analyzed by Journey Analytics.

Completed Statistics

Latest   Legacy
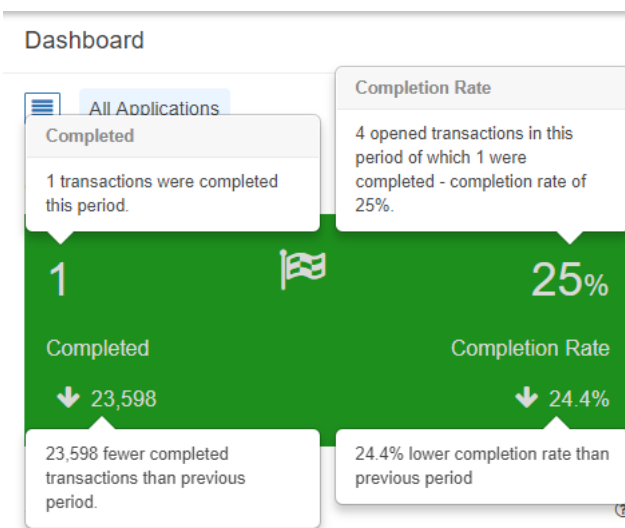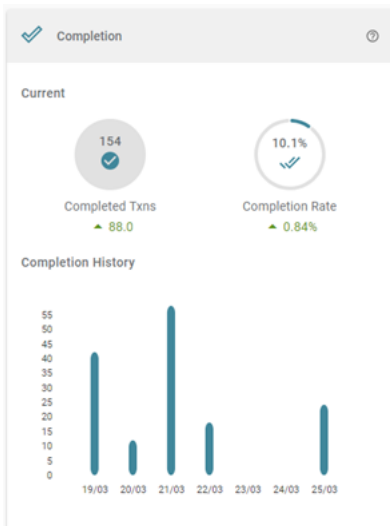
The Completed Statistics tile reflects completion statistics for the transactions associated with the selected applications from the defined time period. This tile is split into two, Completed Txns and Completion Rate.

Completed Txns

The Completed Txns represents the total number of completed transactions for all selected applications.

A transaction is said to be complete when a user opens an application and hits the Submit button after completing all of the required fields in the application.

A comparison to the previous time period is also displayed. For example, if the current time period is set to 2 weeks, completion will be compared to the previous 2 weeks.

This comparison is shown by an arrow with a number beside it. The arrow indicates whether the number of completed transactions has increased (⬆) or decreased (⬇), and the number represents the actual number of completed transactions increased or decreased since the previous time period. In the above v18.11 screenshot, 88 more transactions were completed than in the previous time period.

> If the completion rate has not increased or decreased compared to the previous time period, the comparison will display 0.0 with a dot or horizontal arrow instead.

Completion Rate

The Completion Rate measures the percentage of transactions that were successfully submitted during the selected time period. This metric is calculated by comparing the total number of transactions that were submitted, with the total number of transactions (excluding bounced), during the set time period.

For example, in the v18.05 screenshot, a completion rate of 25% has been reached over the selected time period.

Similarly to the Completed Txns, under the Completion Rate is a comparison to the previous time period. In the above example, a decrease of 24.4% compared to the previous time period occurred.

How to use the Completed Statistics tile

The Completed Statistics tile can be used to:

- Provide you with an overview of transaction completions over a select period of time.
- Determine the completion statistics of transactions associated with select applications.
- Perform a comparison of completed transactions for select applications against an equal period of time in the past.

Field Statistics

The Field Statistics tile displays the combined error rate of all fields in an application or selection of applications. This tile has two sections, the Average Field Errors section, and the Average Field Help section.

Latest ___ Legacy
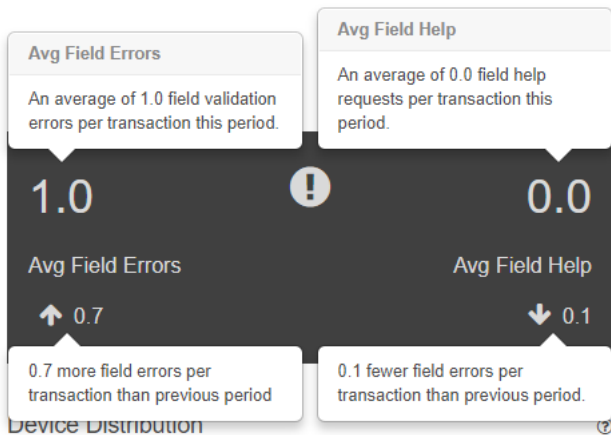
Avg Field Errors

The Average Field Errors section of the Field Statistics tile documents the average number of field validation errors that were encountered per transaction during the set time period. A validation error message is generated and displayed when field rules are violated.

The following are common examples of scenarios where an error message will be generated and displayed:

- Failing to fill out a mandatory field.
- Entering text into a numerical field.
- Entering a postal address in an unacceptable format.

Value of Avg Field Errors

In the v18.05 Field Statistics image above, the Avg Field Errors rate is 0.7%. The up arrow (↑) below the Avg Field Errors rate indicates that the Avg Field Errors rate has increased by 0.7% for the selected applications as compared to the previous time period.

Avg Field Help

Applications can be built to contain help icons to assist users when they are completing applications. When these help icons are selected, they display a set of specific instructions to provide additional help to application users. The Avg Field Help rate in the Field Statistics tile identifies the average number of times that a field help request was made per transaction during the set period of time.

Activity Statistics

The Activity Statistics tile displays the median time taken for a transaction to be completed (submitted) and the average number of sessions used to complete transactions. This tile is divided into two sections, Median Duration, and Average Sessions.

Latest   Legacy
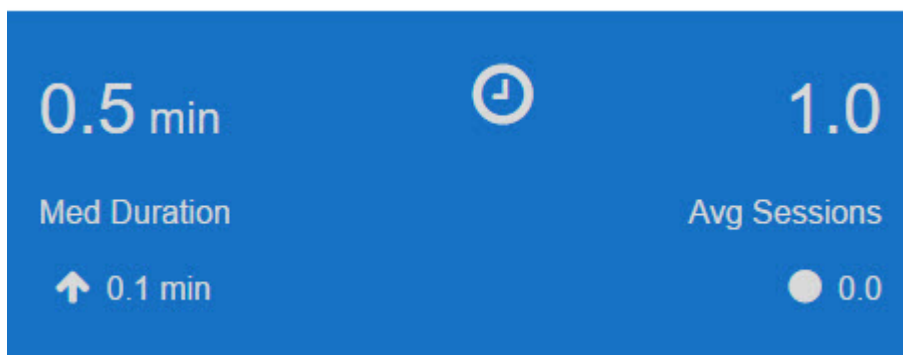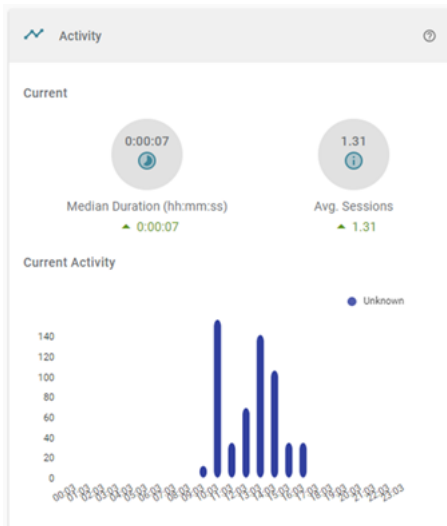
Median Duration

The Median Duration section of the Activity Statistics tile displays the median time taken for a transaction to be completed. The total amount of time taken by each transaction in each selected application is recorded in minutes. The Median Duration is calculated by taking a median of the total amount of time taken by each completed transaction for selected applications.

The Median Duration will give you an idea of the middle amount of time taken by all users to complete a transaction (submit the application).

Similarly to other tiles, the Activity Statistics tile illustrates if an increase or decrease has been made compared to the previous set time period.

For example, the v18.05 Activity Statistics tile image above illustrates a median duration time of 0.5 minutes, with an increase of 0.1 minutes to the median duration of time compared to the previous time period.

Average Sessions

The Average Sessions section of the Activity Statistics tile displays the average number of sessions taken by a user to complete a transaction. In other words, this section of the tile answers the question, what is the average number of times that a user will attempt to complete the application (transaction)?

When a user starts an application (opens an application designed in Maestro, Composer or Open UX), it may take them more than one session to submit the application and complete the transaction.

How to use the Activity Statistics tile

The Activity Statistics tile can be used to:

- Display the middle amount of time it takes for a transaction to be completed, where all mandatory fields are entered and the Submit button is clicked.
- Display the average number of times it takes users to complete a transaction.

The Activity Statistics title shows you if users are taking an irregular number of sessions to complete a transaction. If an application is taking users an irregular number of sessions, then this may be a case of the selected application being too long or not clear enough.

For example, the v18.05 Activity Statistics tile above displays an average session of 1.0, this means that it takes an average of one session for a user to complete one of the selected applications. This average is neither an increase or decrease from the previous set time frame. The example also shows that it takes users an average of 0.5 minutes to complete a transaction. This value is an increase of 0.1 minutes from the previous set time period.

Application History

The Application History tile displays a bar chart visualizing the number of completed transactions in the selected time period. This bar chart is plotted using an x-axis (horizontal) and a y-axis (vertical). Plotted on the x-axis is the selected time period and plotted on the y-axis is the number of completed transactions.

Latest
Legacy
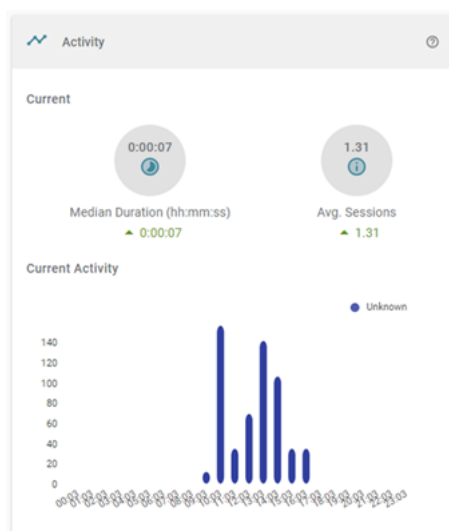
7 Day History
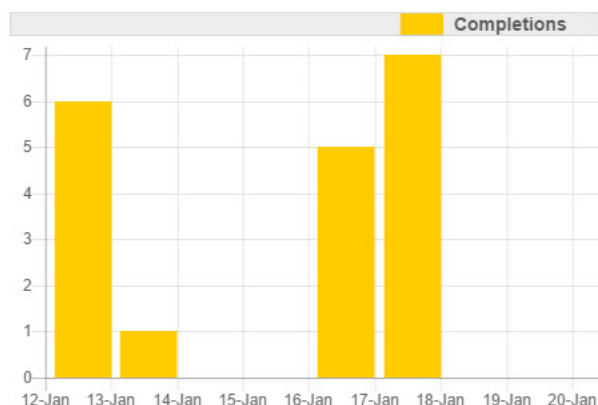
In v18.05 the time period for the chart is set from the period filter in the Global Filter Panel, and on the Dashboard in v18.11.

There are many options available to filter by time period using the Period filter. To make each of these options operate in the bar chart format, Journey Analytics will aggregate each time period to operate on the y-axis automatically.

For example, if 1 week (7 Day History) is selected from the Period filter, an aggregate of 1 day is created. This means that the y-axis will be divided into individual days and the bar chart will plot transaction completions by the day.

Depending on the time period selected, if 12 weeks or Last Quarter (3 month history) is selected, an aggregate of 1 week is created, and if 1 Year or Last Year (12 month history) is selected, an aggregate of one month is created. This means that the y-axis will be divided into months and the bar chart will plot transaction completions by the month.

Device Distribution

The Device Distribution tile identifies and displays the different devices that were used to open the selected applications. This tile displays the percentage proportion of each device and shows the increase or decrease of the use of each device compared to the previous time period.

Latest
Legacy
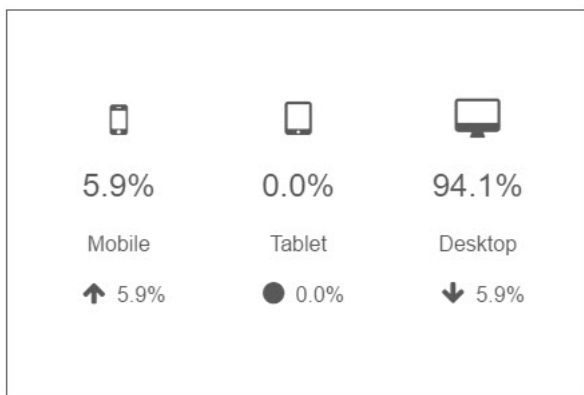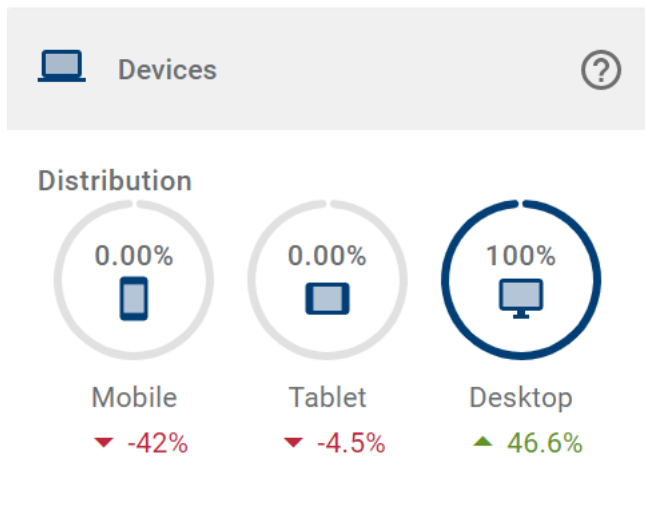
The following are several of the benefits of the Device Distribution tile, it:

- Helps to understand the proportion of devices being used for your selected applications.
- Illustrates which devices are popular with application users.
- Highlights a change in the use of these devices relative to the previous time period.
- Helps to identify highly used devices of an application, this information may be used to optimize your application for this particular device type.

For example, in the v18.05 Device Distribution tile image above, the use of mobile phones has increased by 5.9%. This increase has led to a 5.9% decrease in the use of Desktop devices during the current period compared to the previous time period.

Today's Active Sessions

The Today's Activity Sessions tile generates a line graph that visualizes an aggregated number of sessions generated at specific times during a 24-hour time period. This 24-hour time period is plotted on the x-axis (horizontal), and the number of active sessions generated during the 24-hour time period (regardless of being complete or incomplete) is plotted on the y-axis (vertical). This line graph will create separate curves for sessions generated on mobile, desktop or tablet devices.

The following v18.05 images are examples of the Today's Active Sessions tile.

Click on images to expand and reduce
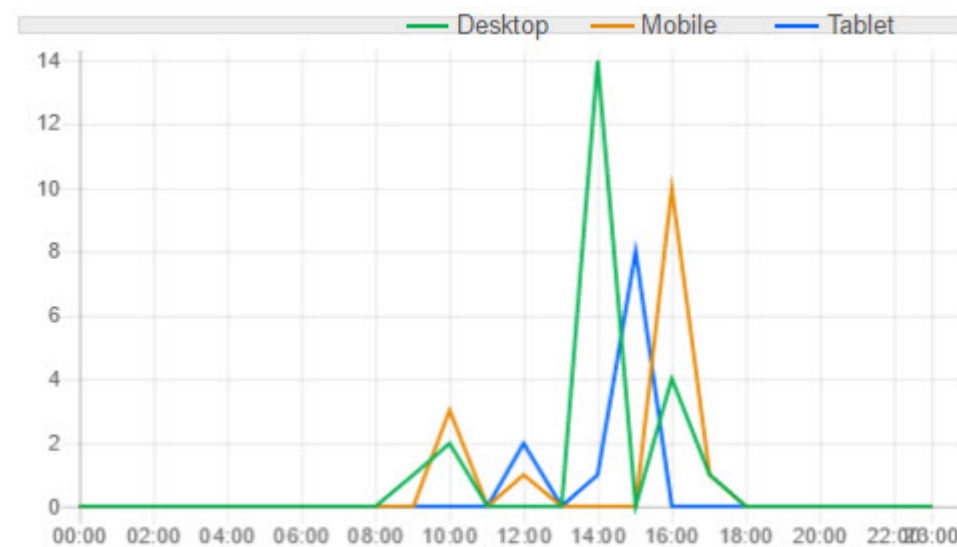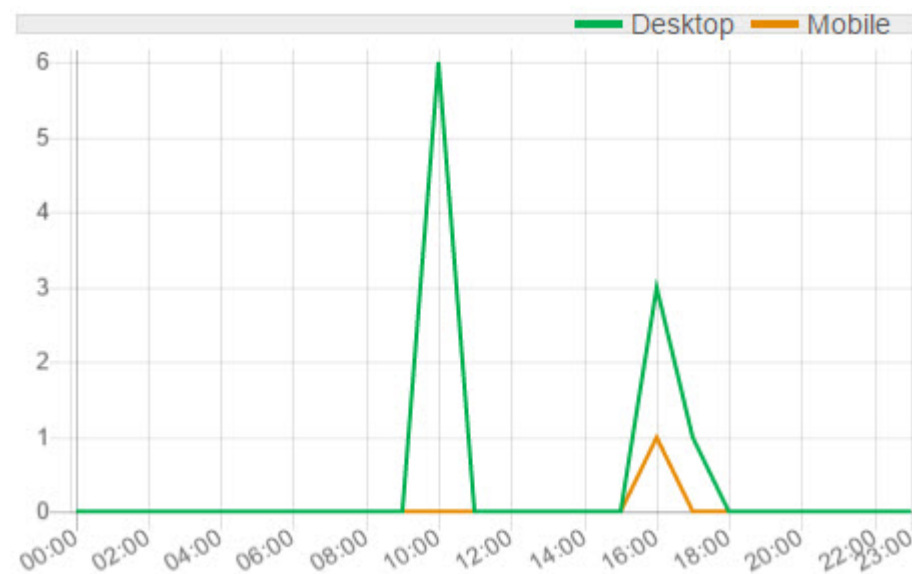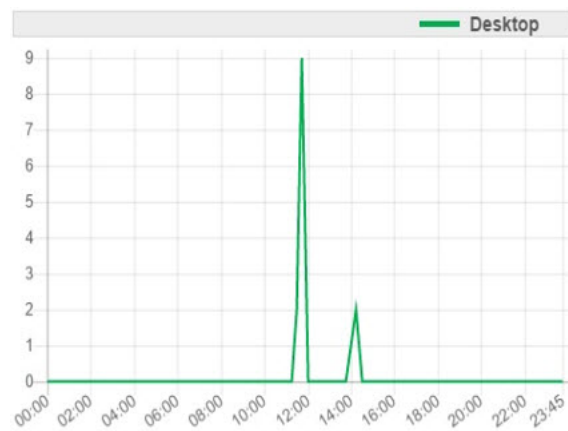
The line graph generated in the Today's Activity Sessions tile is great for providing you with a quick overview of the activity that your selected applications have seen over a short period of time.

Timeline View

Journey Analytics | Analytics User | Latest Version

The Journey Analytics Timeline View displays the following data for transactions that started within the selected scope:

- Overview of all transactions in a bar chart.
- The number of transactions that were bounced, started, abandoned or completed.
- The median time taken for each transaction to be completed.

To display the Timeline View:

1. Select **Timeline** from the Navigation Panel.
2. Select the application and time period to analyze.
3. Select the timeline metric tab you want to analyze.
4. The Timeline View displays.

Latest   Legacy

Txn Status Split	All Txns	Bounced	Completed	Completion Rate	Median Time	Avg Sessions
Loan Application	2,814	1,973	243	34.9%	7.7 min	1.0
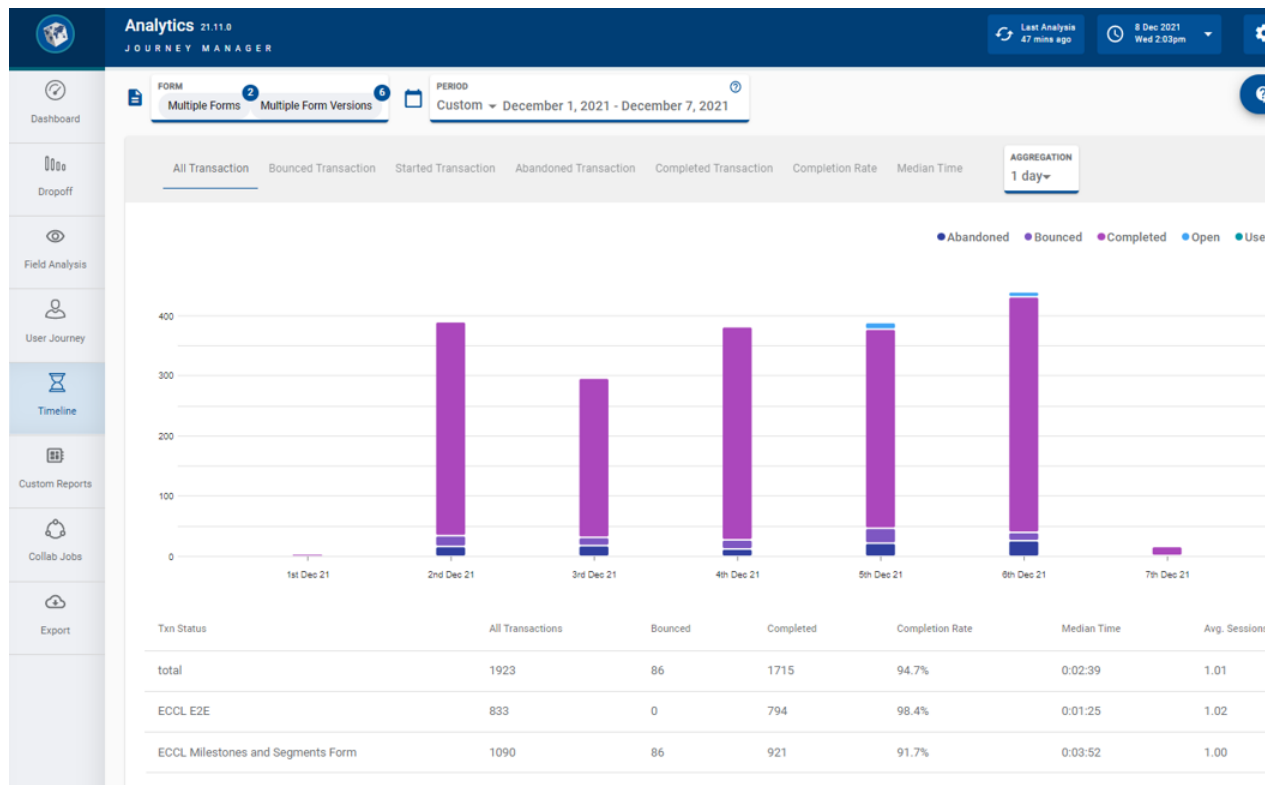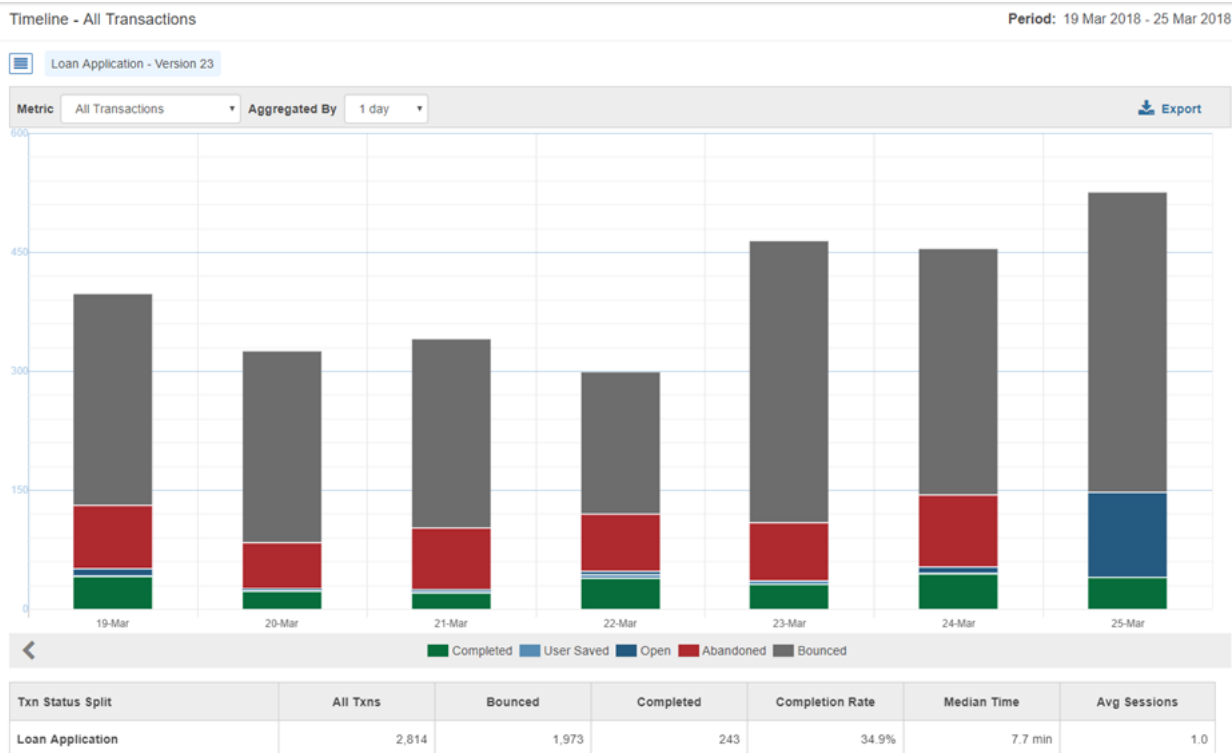
Timeline View options

The Timeline View contains the following options:

- **Metric Tabs** to select the metric that you want to analyze.

- **Aggregation** dropdown to set the blocks of time the chart will be broken up by.

- **Split By** dropdown for you to split the results based on a browser, device, application version, operating system or space (not applicable for All Transaction).

Metric

Metric	Description
All Transaction	Displays an overview of all transactions that occurred during the selected time period using a bar chart.
Bounced Transaction	Displays the number of transactions that were bounced during the selected time period. Bounced transactions occur when an application (designed in Maestro, Composer or Open UX) is opened but closed before generating a start transaction event (user clicking or entering input into a field).
Started Transaction	Displays the number of transactions started during the selected time period.

	A transaction start event occurs when at least one text/number field is typed-in or at least one checkbox/drop down is clicked by the user.
Abandoned Transaction	Displays the number of transactions that were abandoned during the selected time period.
	Abandoned transactions occur when a transaction has one start event but the application is closed before it is completed and the user never returns to complete the transaction.
Completed Transaction	Displays the number of transactions that were completed during the selected time period.
	Transaction may have started but this metric represents when a user completes all mandatory fields and clicks submit.
Completion Rate	Displays the completion rate of the transactions during the selected time period.
Median Time	Displays the median time taken to be completed by each transaction during the selected time period.

Aggregation

The Timeline View allows you to set the aggregation. The aggregation will break the graph up into blocks of either minutes, hours, days or weeks. For example, if your set time period is Last Month, you then have the choice to aggregate the data by days, weeks or fortnightly. For each Scope Selector time period, there are several aggregations available for you to choose from. See the aggregation options available below.'

Time Period	Aggregation options
Today	15 minutes, 30 minutes, 1 hour, 4 hours
Yesterday	15 minutes, 30 minutes, 1 hour, 4 hours
Last Week	4 hours, 1 day
Last Fortnight	4 hours, 1 day
Last Month	1 day, 1 week, 2 weeks
Last Quarter	1 day, 1 week, 2 weeks, 30 days
Last Year	1 week, 2 weeks, 30 days, 90 days, 180 days
Custom	Variable depending on Time Frame Selection

The Aggregation that you select will depend on the time frame you are analyzing. For instance, it makes sense to aggregate a 1-day period by 15-minute time periods, but for a period of 1 year, an Aggregated By value of 30 days (1 month) makes more sense.

Split By

The Split By dropdown allows you to split the results based on a browser, device, application version, operating system or space (not applicable for All Transaction).

Latest   Legacy
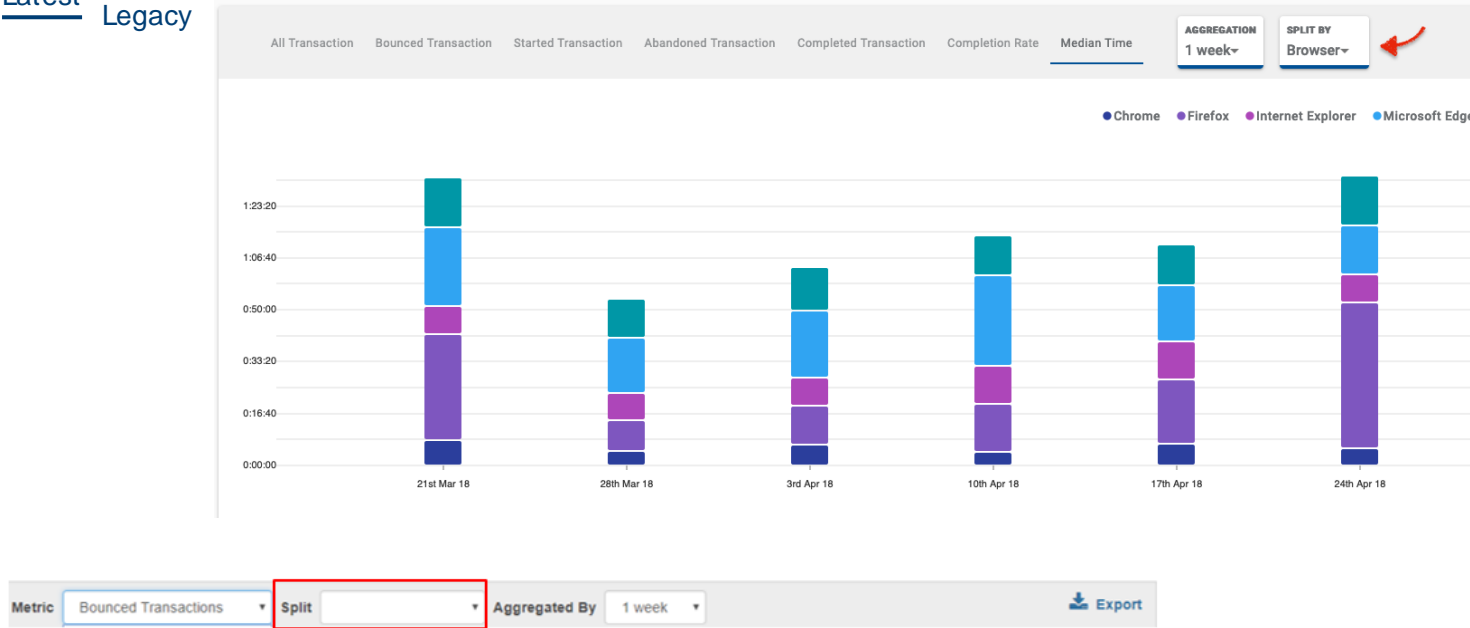
Classes available

Split By	Classes available
Browser	Chrome, Firefox, Safari, Internet Explorer, Microsoft Edge
Device Type	Mobile Phone, Tablet, Desktop
Application	This option splits the results by application (Form) and version.
Operating System	Android, iOS, Windows, MacOS X, Linux
Space	Selected Space from the Global Filters

Timeline View components

The Timeline View contains the following data visualization components:

- Timeline Chart
- Timeline Table

Timeline Chart

<u>Latest</u> Legacy

The Timeline chart plots the selected metric against the selected time period. Alongside the chart is a legend that indicates what each of the colors represents.

Timeline Table

<u>Latest</u> Legacy

Txn Status	All Transactions	Bounced	Completed	Completion Rate	Median Time	Avg. Sessions
total	1923	86	1715	94.7%	0:02:39	1.01
ECCL E2E	833	0	794	98.4%	0:01:25	1.02
ECCL Milestones and Segments Form	1090	86	921	91.7%	0:03:52	1.00

Txn Status Split	All Txns	Bounced	Completed	Completion Rate	Median Time	Avg Sessions
Loan Application	2,814	1,973	243	34.9%	7.7 min	1.0

The Timeline Table displays an overview of transaction statistics for the selected application/s. Each row of the table represents one application.

The following statistics are presented in the Timeline Table:

- All Transactions started
- All Bounced Transactions
- Transactions Completed
- Transaction Completion Rates
- Median Times
- Average Sessions

Export

Latest Legacy   The screenshot does not include an Export button as there is a new Export View available from the Navigation Panel, which has been purpose built for filtering the required data and downloading a CSV file for further analysis.
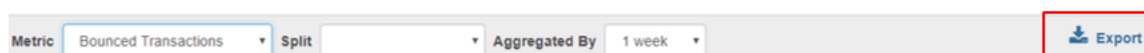
Click on the Export button to download the displayed data into a CSV file for further analysis.

The CSV file will be located in the default download folder set for the browser. All filters that are applied to the current view are also applied to the exported data.

Next Steps...

Learn about Dropoff View and how users interact with sections of an application.

Dropoff View

Journey Analytics | Analytics User | Latest Version

The Journey Analytics Dropoff View provides visualizations to help identify abandonment hotspots by aggregating behavioral data from applicant transactions. Dropoff, or user abandonment, and other user behavior can be examined at the transaction-level for a particular form version and at the section-level to compare each section's performance within a form version.

To display the Dropoff View:

1. Select **Dropoff** from the Feature Navigation Panel.

2. Select the application and time period to analyze.

> Only one version of an application can be selected at a time in the Dropoff View.

3. The Dropoff View displays.

Latest
Legacy

Transcription Metrics ⦾

Conversion Rate

125k	**27.8%**	**39.4%**	**32.8%**
Total Txns	Bounced	Abandoned	Converted

Transaction Status Counts ⦾

↘ ▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬ 34.7k

⚑ ▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬ 49.2k

✓✓ ▬▬▬▬▬▬▬▬▬▬▬▬▬▬ 40.9k

Completion Rate ⦾

90.1k	**54.6%**	**45.4%**
Started	Abandoned	Completed

✓ Section Completion ⦾   ✎ Edit Sections

Let's get started!	**Personal info**	**Additional info**	**Review the details**	**Verify me**
4 Fields	48 Fields	23 Fields	0 Fields	8 Fields
93.3%	**74.2%**	**76.0%**	**98.7%**	**98.0%**
93.3%	67.5%	51.3%	50.6%	40.1%

Section	Bounce Rate	Abandonment Rate	Completion Rate	Median Time (ms)
Let's get started!	1.57%	5.08%	93.3%	13677
Personal info	13.6%	12.2%	74.2%	77003
Additional info	2.54%	21.5%	76.0%	37720
Review the details	1.34%	0.00%	98.7%	26572
Verify me	1.41%	0.58%	98.0%	36819

The Dropoff View presents user abandonment data in two separate components:

- **Transaction Metrics** - displays stats that highlight transaction-level behavior for the application.
- **Section Completion** - visualizes stats for each section of the application using a chart. Below the chart with section stats are displayed below as a table. The green trend-line that traverses each section represents the slope of transaction completion across the overall journey.

Transaction Metrics

Transaction Metrics visualizes transaction-level data, as opposed to section-level data which is displayed within Section Completion. For this reason, stats will differ between Transaction Metrics and Section Completion.
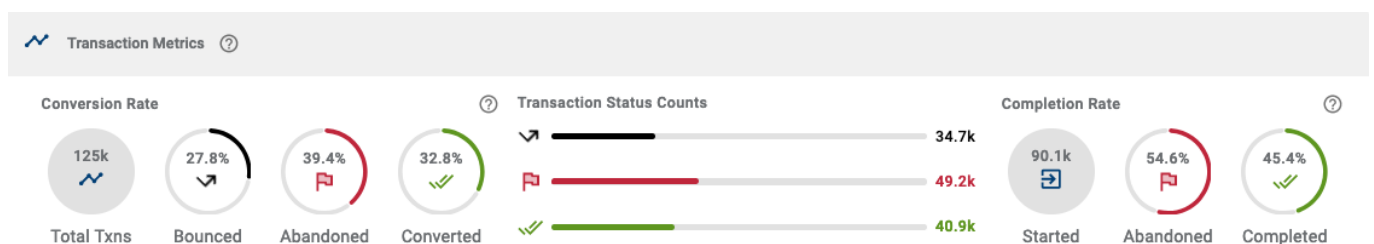
The Transaction Metrics component contains three sub-components which contain grouped statistics:

Conversion Rate stats are based on all traffic within the selected scope.

Transaction Status Counts are based on all traffic within the selected scope.

Completion Rate stats are not based on all traffic, as they exclude Bounced transactions, or transactions where no user interaction occurred.

All traffic stats will likely include noise which is not actual user traffic, such as from bots and search-indexing requests to the application. To mitigate noise, use Global Filters to either Whitelist specific trusted browsers or Blacklist browsers identified as Robot / Crawler types.

Conversion Rate
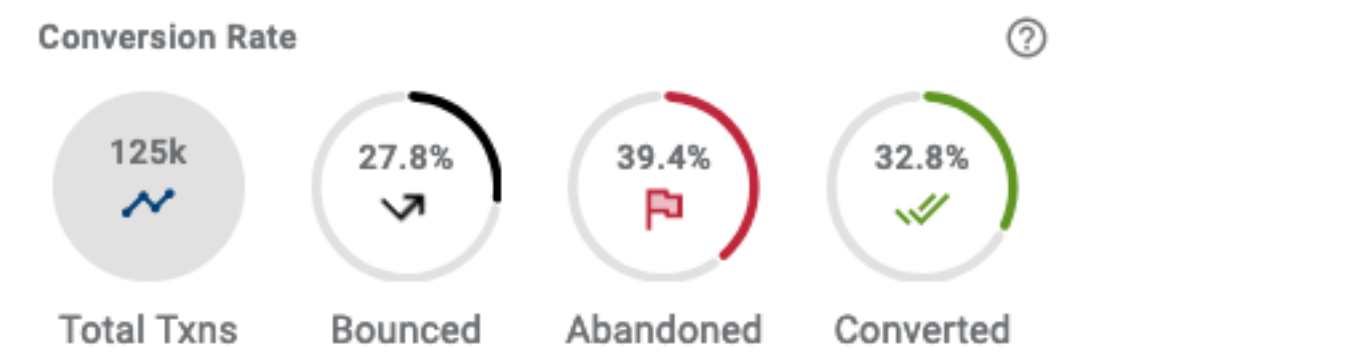
	Description
Total Txns	All transactions that were first opened during the selected period, and have a current Transaction Status of either Bounced, Abandoned or Completed. This number excludes transactions that are currently in either Open or User-Saved Transaction Status.
Bounce Rate	The percentage of Bounced transactions compared to the number of total transactions.
Abandoned	The percentage of Abandoned transactions compared to the number of total transactions.
Conversion	The percentage of Completed transactions compared to the number of total transactions.

Transaction Status Counts

	Description
Bounced	Total number of Bounced transactions during the selected time period.
Abandoned	Total number of Abandoned transactions during the selected time period.
Completed	Total number of Completed transactions during the selected time period.

Completion Rate
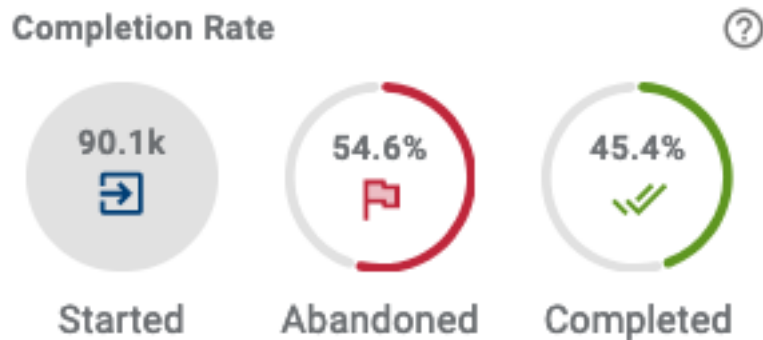
	Description
Started	All transactions that were first opened during the selected time period, have had user interaction and are considered either Abandoned or Completed. This number excludes Bounced transactions and transactions that are currently in either Open or User-Saved status.
Abandoned	The percentage of Abandoned transactions compared to the number of Started transactions.
Completed	The percentage of Completed transactions compared to the number of Started transactions.

Transaction volumes may differ between form transaction-level and section-level stats. This discrepancy is due to some users employing browser addons which block analytics event capture.

Section Completion

This area of the Dropoff View presents data for each section of the selected application in a detailed chart and as a table.
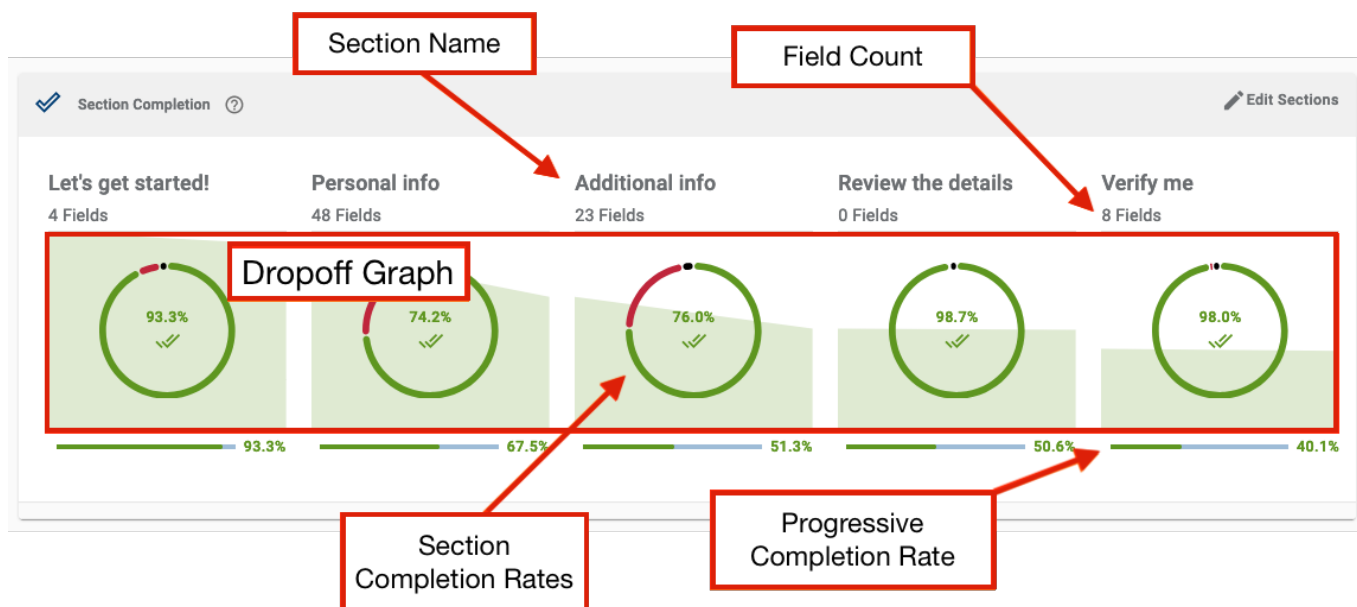
To better understand each part of the Section Completion, use the information below for each chart component:

Personal info

Section Name

The name of the section. Depending on implementation, this can represent the pages, sections, modals or dialogues of the applications.

By default, both modal and dialogue type sections are hidden. Use **Edit Sections** to toggle their visibility.

48 Fields

Field Count

The number of fields that users interacted with in each section displays below the name of the section.

The total field count in the form can be calculated by adding up field counts from each section.
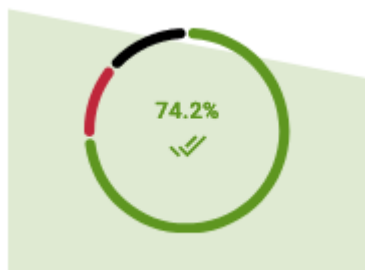
Dropoff Graph

The starting height of the green line on the Dropoff Graph represents the the number of transactions where users navigated to the section. Then endpoint of the line for each section shows how many Completed the section.

Clicking an individual section will drill down to the field-level statistics of the section clicked. This is a shortcut that's equivalent to navigating to the Field Analysis View and selecting the same section manually.

Dropoff View

The Section Completion Rates doughnut chart displays the Bounce, Abandonment and Completion rates for each section.

The green rate for completion of the section is displayed by default. Hover over the colored wedges of the doughnut chart to show the corresponding metric at the center of the doughnut.

Hover over the rate in the center of the doughnut to see a more detail and a breakdown of the rates.

	Colour	Description
Bounce	Grey/black	A user visited the page or section but **did not** interact with any fields in that section and Abandoned the transaction.
Abandonment	Red	A user visited the page or section, interacted with at least one field and then Abandoned the transaction.
Completed	Green	A user visited the page or section, filled in all mandatory fields, Completed that section and then proceeded to the following section.

Progressive Completion

The Progressive Completion Rate metric is shown at the bottom of each section.

This metric shows the percentage of users who completed that section compared to the number of users who Started the application.

Customize the Chart

Click the **Edit Sections** button to customize how the graph is displayed. In customization mode, you can toggle visibility, reorder, rename and combine sections in the graph.

Toggle Visibility - Click the eye button to show and hide the section in the graph.

Rename Sections - Click the Section Name to change the section label in the graph.

Reorder Sections - Click and drag any section from left to right then drop it between sections to change its position in the graph.

Combine Sections - Click and drag a section on top of another section to aggregate the data for both into a single section. On dropping the card, the Dropoff Graph, Section Completion Rates and Progressive Completion Rate are all recalculated using the aggregate data.

Any customizations applied are saved to your browser local storage so that you can quickly view the relevant sections on subsequent login. **Reset** will erase any saved customization and return the Section Completion Chart to the default names, order and visibility of the sections.

Section Completion Table

The table below the chart presents the same information as the chart, but in table format. Each row of the table shows section completion data for the selected application.

Section	Bounce Rate	Abandonment Rate	Completion Rate	Median Time (ms)
Let's get started!	1.57%	5.08%	93.3%	13677
Personal info	13.6%	12.2%	74.2%	77003
Additional info	2.54%	21.5%	76.0%	37720
Review the details	1.34%	0.00%	98.7%	26572
Verify me	1.41%	0.58%	98.0%	36819

> A Section in Journey Analytics is equivalent to a Maestro Page or if using Transact Composer, a Section Level 1.

Example Analysis
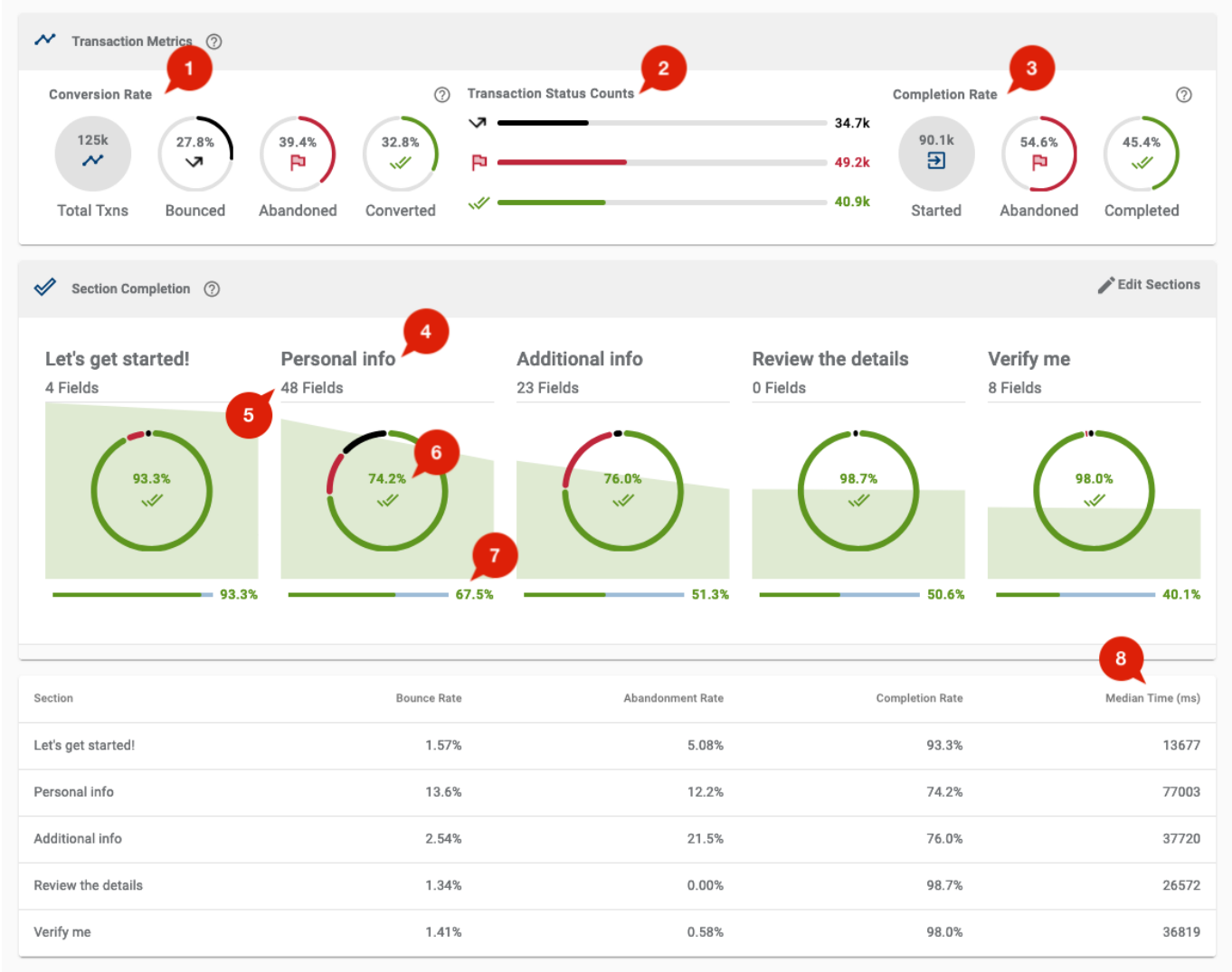
To better understand real-life usage of the information presented in the Dropoff View, use the example screenshot and the key takeaways below.

Key takeaways

1

There were 125,000 transactions (rounded to the nearest 1000) where a user opened or navigated to the form, as noted by the Total Txns metric.

27.8% of the Total Txns were Bounced, or transactions that didn't receive any user interaction after being Opened.

39.4% were Abandoned transactions, or user attempts that **did not** succeed.

The remaining transactions were Converted. Conversion Rates are calculated based on all incoming traffic to the form, which includes robots, search indexers and other non-user activity. This is opposed to Completion Rates, which are calculated based on only the transactions where users actually interacted with fields on the form.

This shows the actual transaction counts (rounded to the nearest 1000) for each transaction status within the currently selected scope:

2

34,700 Bounced form transactions, where the form was opened or navigated to but no fields were interacted with.

49,200 Abandoned form transactions, where the form was opened, then Started, but then the transaction was **not** completed.

40,900 Completed form transactions, where the from was opened, then Started, and then the transaction was completed.

This shows only the form transactions where users actually interacted with fields, or Started the form, within the currently selected scope:

3

90,100 Started form transactions (rounded to the nearest 1000), or transactions where users actually interacted with fields.

54.6% Abandoned form transactions, or user attempts that **did not** succeed.

45.4% Completed form transactions, or user attempts that **did** succeed.

4

This indicates the Personal Info section of the form.

5

This indicates the field count of the Personal Info section. 48 unique fields received user interactions.

6

This indicates that, out of the total transactions where users navigated to the Personal Info section, 74.2% were able to complete the required fields for the section. However, the next section, Additional Info, has the highest rate of abandonment for any section in the form, indicating its a point of user friction or difficulty.

7

This indicates that the section has a 67.5% Progressive Completion Rate, which is the rate of transactions where users made it this far, by interacting with and completing this section, in comparison to the number of Started transactions. In applications where users progress in a linear fashion through the sections, like this example, this rate decreases for the later sections as some users did not progress.

8

This column indicates the median time that users spend interacting with each section. For the Personal Info section, the median time to complete is 77 seconds (77003 milliseconds), the most time-consuming section for users within the currently selected scope.

Next Steps...

When you've identified a section where users 'dropoff', click the section in the Section Completion chart to drill down and analyse user behaviors for fields within the section using Field Analysis View.

Field Analysis View

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The Journey Analytics Field Analysis View displays detailed field-level statistics for a selected section (or All Sections) for all transactions within the selected scope. Use this view to identify abandonment hotspots, optimization opportunities and to understand how users interact with fields within the selected sections.

To use the Field Analysis View:

1. Navigate to **Field Analysis View** by one of two ways:

1. Select **Field Analysis** from the Navigation Panel.

2. From Dropoff View, click any section column on the Section Completion Chart to display the section's Field Analysis.

2. If not already set, select the application and time period to analyze.

> Only one version of an application can be selected at a time in the Field Analysis View.

3. The Field Analysis View displays.

4. Use options to filter the data to display.

Latest Legacy

Components of the Field Analysis View

The Field Analysis View contains the following components:

- Field Analysis View options
- Section-Level Metrics
- Field-Level Metrics

Field Analysis View options

These options are used to change how and what data is displayed for both Section-Level and Field-Level Metrics.

Use **Section** to select a section, or **All Sections**, to analyze all fields in all sections of the application.

Use **Metric** to select different statuses of the applications to analyze, such as Keystrokes, Abandoned or Completed.

Use **Sort by** to sort by either:

- Natural Sequence - the order in which the fields appear in the application.
- Lowest to Highest - based on the selected metric and its score.
- Highest to Lowest - based on the selected metric and its score.

Use **Display by** to display the data by field label or field path.

Section-Level Metrics

These stats provide summary info for the sections selected and associated user transactions.

Statistic	Description
Field Count	The number of fields (that had user interactions) within the selected section
Unique Visits	The total number of transactions where users navigated to the selected section. The metric includes all transactions whether the user actually Started the section or immediately Bounced after navigation.
Started	Section-level Started count is the volume of transactions where the user interacted with fields in the selected sections.
Completed	Section-level Completion shows the volume and rate of user transactions which interacted with and completed the selected section. This option is not displayed for 'All Sections'.

Field-Level Metrics

These stats are at the field-level and can help you identify fields where users spend more effort to complete. Effort can be better understood by factoring in many stats like Keystrokes used, number of times Help info is viewed, Errors encountered, and looking to fields with higher rates of Abandonment.

For each field within the selected sections where user interactions occurred, the following stats are displayed:

To better understand each stat, use the table for reference:

Statistic	Description
First Name	**Field-level Rate for Selected Metric** - The field name (or path) and the rate for the selected metric is displayed. **325 (3.86% Of All Abandonments)**
87.1%	**Completion rate** - The rate at which users complete the field, expressed as a percentage of the total number of field commencements. Field commencements are recorded only if the field is interacted with or touched by a user.
0.01	**Average Field Errors** - The average number of times a field error occurs within a single transaction, includes validation and mandatory errors. Only the form transactions where users interact with the field are factored in.
3.94s	**Median Time Spent** - The median length of time that users took to complete the field after first interacting with the field.
0	**Average Field Help** - Average number of times the field help was used per form transaction.
5	**Median Keystrokes** - The median number of keystrokes used to complete the field per form transaction.

Examples

Since various options exist for leveraging the Field Analysis View, please refer to these example analyses below to better understand the potential insights this view can provide.

Field Analysis Example - Keystrokes

From the Metric dropdown, choose Keystrokes to view a detailed keystroke analysis of each field in the section selected.

SECTION	METRIC ⑦	SORT BY ⑦	DISPLAY BY ⑦
Personal info ▾	⌨ Keystrokes ▾	Highest to Lowest ▾	Field Label ▾

PERSONAL INFO
Section-Level Metrics

👁 Field Count 48	👤 Unique Visits 11044	→ Started 9074	✔✔ Completed 7188 (79.2%)

PERSONAL INFO
Field-Level Metrics

My Previous Address Was
27   100% ✔✔   0 ⚠   18.6s 🕐   0 ❓   27 ⌨

Email Address
21   92.1% ✔✔   0.03 ⚠   8.86s 🕐   0 ❓   21 ⌨

My Previous Address Was
20   98.2% ✔✔   0.01 ⚠   23.3s 🕐   0 ❓   20 ⌨

Email Address
18   90.8% ✔✔   0.03 ⚠   7.12s 🕐   0 ❓   18 ⌨

Note that for some fields, keystroke values may be zero, for example:

- A field will result in zero keystrokes if the user uses a radio button or dropdown, as no keystrokes are recorded for this type of field.
- A field that uses an auto-fill function will have no keystrokes associated, as the user is not required to enter anything into the field.

Field Analysis Example - Abandoned

From the Metric dropdown, choose Abandoned to take a look at field-level abandonment for each field in the section selected.

SECTION	METRIC	SORT BY	DISPLAY BY
Personal info ▾	⚑ Abandoned ▾	Highest to Lowest ▾	Field Label ▾

PERSONAL INFO

Section-Level Metrics

👁 Field Count 48	👤 Unique Visits 11044	⇥ Started 9074	✔✔ Completed 7188 (79.2%)

PERSONAL INFO

Field-Level Metrics

State Of Issue
692 (12.5% Of All Abandonments)   96.4%   0   5.25s   0   0

Social Security Number
238 (4.31% Of All Abandonments)   95.6%   0.01   7.53s   0   9

First Name
211 (3.82% Of All Abandonments)   87.0%   0.01   3.91s   0   5

Type Here To Find Your Current Address
198 (3.58% Of All Abandonments)   97.2%   0.01   21.2s   0   18

For each field, the field-level rate indicates the number of transactions where the field was the last to receive user interaction before the transaction was abandoned. In addition to the raw transaction counts, the ratio of total abandoned transactions is also displayed. It's important to examine the actual form design as the culprit field may be a field immediately before or even after the field associated with high abandonment.

Refer to the screenshot example and note the high rate of abandonment for State of Issue field. It may be the case that users face friction with State of Issue Field itself or that users look to the field immediately after State of Issue field, and decide not to proceed with the transaction. Because the last field interacted with in the section was the State of Issue field, its marked as an area of high abandonment.

Field Analysis Example - Completion

From the Metric dropdown, choose Completions to view a detailed analysis regarding which fields in the selected section are completed successfully.
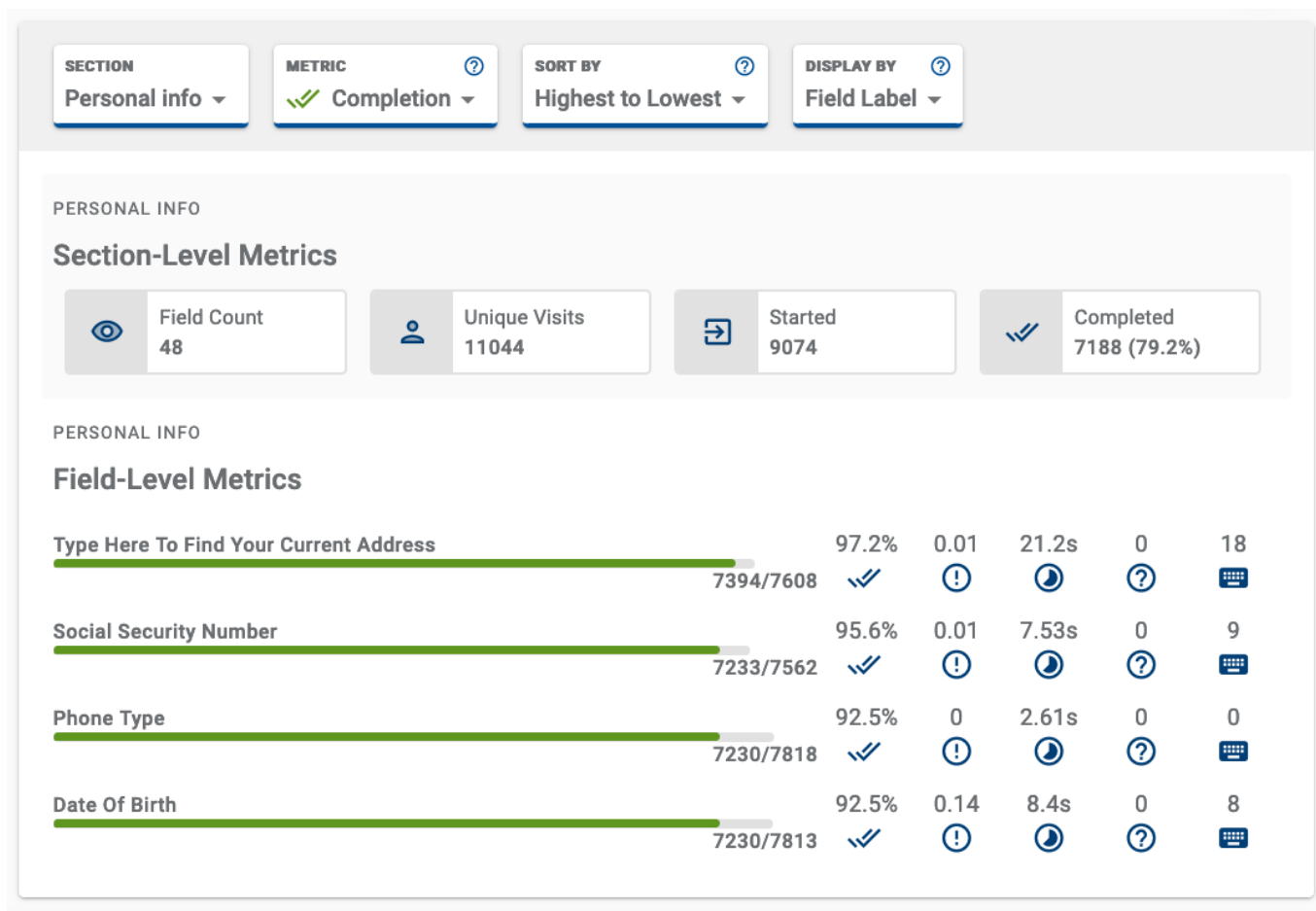
For each field, the field-level rate indicates the number of transactions where the field was interacted with and completed vs. the number of transaction where this field was attempted. These are the raw figures used to calculate the Completion Rate for each field.

Export

Latest Legacy Use the dedicated Export View available from the Navigation Panel. Export View is purpose-built to enable filtering at the field-level so you can download the raw data into a CSV file for further analysis.
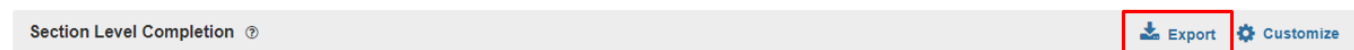
Click on the **Export** button to download the displayed data into a CSV file for further analysis.

The CSV file will be located in the default download folder set for the browser. All filters that are applied to the current view are also applied to the exported data.

Export Example

	A	B	C	D	E	F	G	H	I	J	K	L	M	
1	Field Path	Sequence	Page Names	Field Labels	Commenced Count	Abandoned Count	Completed Count	Average Time Ms	Median Time Ms	Average Keystrokes	Average Validation Errors	Average Mandatory Errors	Average Help Used	Media Keyst
2	AvokaSmartForm/applicant1Title	76	["Getting started"]	["Title"]	4234	258	0	0	0	0	0	0.21620983	0	
3	AvokaSmartForm/applicant1FirstName	77	["Getting started"]	["First name"]	4092	287	3289	5153	3493	3.9772615	0	0.22518337	0	
4	AvokaSmartForm/applicant1LastName	78	["Getting started"]	["Last name"]	4009	292	3545	4418	3524	3.7167456	0	0.23483904	0	
5	AvokaSmartForm/applicant1PreferredName	81	["Getting started"]	["Preferred name (optional)"	2506	23	1698	3141	21	2.3899322	0	0	0	
6	AvokaSmartForm/applicant1Email	82	["Getting started"]	["Email"]	3952	373	3402	12701	8140	12.516709	0.039493673	0.26329115	0	
7	AvokaSmartForm/applicant1Mobile	83	["Getting started"]	["Mobile number"]	3938	486	3414	12090	7690	6.945376	0.016006097	0.27007115	0	
8	AvokaSmartForm/comments	84	["Getting started"]	["Any comments? (optional)"	1382	91	0	0	0	0	0	0	0	

Next

Next, learn about Export View.

Export View

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The Journey Analytics Export View, allows you to export analytics reports to CSV with the ability to select the granularity of your reports and retrieve exports for multiple applications in a single file. This feature has been designed specifically to export the raw Journey Analytics data into a CSV file to perform further analysis.

Use the scope and period selectors to choose the application or forms and time period you want to analyze, then select the Report Type, Metrics and any Groups you want to show in the exported file.

To display the Export View:

1. Select **Export** from the Navigation Panel.

2. Select the application and time period to analyze.

3. Select the type of report you want using the export options.

4. Click **Export**.

5. The CSV file is downloaded to your **Downloads** folder.

Export Options

Options	Value	Description

Report Type	Fields	Include field level statistics for all fields in the application. This option breaks down the data at the field level for the selected scope and metrics.
	Sections	Include section level statistics if the user interacts with any field in the section. This option breaks down the data at the section level for the selected scope and metrics.
	Summary	Include a summary of both field and section level statistics. This option exports a sum of all selected metrics for the selected scope.

Metrics	Completed	Only include Completed transactions in report.
	Commenced	Only include Commenced transactions in report.
	Abandoned	Only include Abandoned transactions in report.
	Completion Rate	Only include Completion Rate statistics in report.
	Abandoned Rate	Only include Abandoned Rate statistics in report.
	Median Validation Errors	Only include Validation Error statistics in report.
	Median Mandatory Errors	Only include Mandatory Error statistics in report.
	Median Help Used	Only include Help Used statistics in report.
	Median Field Duration	
	Median Keystrokes	

		Only include Field Duration statistics in report.
		Only include Keystroke statistics in report.
		See for more information on transaction statuses.
		Breakdown data by application or form name.
	Form	Breakdown data by form version.
	Form Version	
Group by	Day Opened	Breakdown data by date transactions were opened.
	Browser Type	
	Device Type	Breakdown data by browser type.
		Breakdown data by device type.

Output CSV File Example

field_path	abandoned_count	completion_rate	med_mandatory_error	med_keystrokes	med_help_used	commenced_count	abandoned_rate	med_validation_errors	completed_count	med_field_duration
AvokaSmartForm/TextField_6	0	1	0	10.571428	0	16	0	0	16	1.5714285
AvokaSmartForm/TextField_3	1	0.9285714	0	9.285714	0	14	0.071428575	0	13	1.7142857
AvokaSmartForm/Age_1	0	1	0	1	0	14	0	0	14	3.5
AvokaSmartForm/TextField_4	0	1	0	7.571429	0	15	0	0	15	1.2857143
AvokaSmartForm/OccupationSe	0	1	0	1.5	0	14	0	0	14	3
AvokaSmartForm/FirstName	1	0.96428573	0	9	0	28	0.035714287	0	27	3.0555556
AvokaSmartForm/TextField_10	0	1	0	7.6666665	0	6	0	0	6	2.3333333
AvokaSmartForm/EmailAddress	0	1	0.5	21.25	0	7	0	0.5	7	8
AvokaSmartForm/Age	0	1	0	10	0	15	0	0	15	16
AvokaSmartForm/DatePicker	0	1	0	0	0	1	0	0	1	2
AvokaSmartForm/TestFieldValic	3	0.84210527	0.71428573	5.142857	0	19	0.15789473	0.71428573	16	2.7142856
AvokaSmartForm/LastName	1	1	0.083333336	15.666667	0	19	0.05263158	0.083333336	19	7.5833335
AvokaSmartForm/TextField_8	0	1	0	8.857142	0	13	0	0	13	1.2857143
AvokaSmartForm/TextField	2	1	0	7.875	0	21	0.0952381	0	21	1.5
AvokaSmartForm/MastersoftAd	0	1	0	0	0	9	0	0	9	3
AvokaSmartForm/HowDoYouWi:	0	0.5	0	0	0	6	0	0	3	2
AvokaSmartForm/TestFieldMan	26	0.9099099	0	5.7777777	0	111	0.23423423	0	101	2.1111112
AvokaSmartForm/TextField_2	1	1	0	9.375	0	17	0.05882353	0	17	2.5
AvokaSmartForm/Checkbox	0	1	0	0	0	10	0	0	10	1
AvokaSmartForm/ReasonForLoa	0	0.5833333	0	3	0	12	0	0	7	2.6666667
send_receipt_email	0	0	1	0	0	4	0	1	0	0
AvokaSmartForm/TextField_9	1	1	0	10	0	13	0.07692308	0	13	2
AvokaSmartForm/EmergencyFir	0	1	0	1.6666666	0	3	0	0	3	0.6666667
AvokaSmartForm/OccupationSe	0	1	0	2	0	14	0	0	14	3.5
AvokaSmartForm/TestFieldHelp	1	0.98058254	0	5.285714	1.4285715	103	0.009708738	0	101	3.2857144
AvokaSmartForm/TextField_7	0	1	0	8.428572	0	13	0	0	13	1.2857143
AvokaSmartForm/DateOfBirthDi	0	1	0	0	0	3	0	0	3	2.5
AvokaSmartForm/TextField_1	0	1	0	10.142858	0	16	0	0	16	2
AvokaSmartForm/EducationLeve	0	1	0	1.5	0	14	0	0	14	3
AvokaSmartForm/Email	0	1	0.33333334	16.333334	0	10	0	0.33333334	10	5
AvokaSmartForm/Location_1	0	1	0	1.5	0	14	0	0	14	2
AvokaSmartForm/EmergencyLas	0	1	0	3	0	1	0	0	1	1

Export View

Custom Reports View

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The Journey Analytics Custom Reports View provides a customizable dashboard that makes it easy to compare the performance of your application versions, across many different metrics in a single view. This view is empty by default but multiple metrics can be displayed in the form of reports that can be arranged and resized on the screen.

To display the Custom Reports View:

1. Select **Custom Reports** from the Navigation Panel.

2. Select the application and time period to analyze.

3. To narrow down the types of transactions reported on, you can also use the Global Filters panel.

4. Click **Add Report** to select the type of report card you want to display.

5. Click and drag the report card into the desired location on the screen. If desired, add more report cards.

6. To configure the report card options, click ⋮ and **Configure**, then click **Apply**.

7. To delete a report card, click ⋮ and **Delete**.

8. Use the **Save** button and dialogue to store the set of reports and their configuration or to retrieve a saved set of reports.
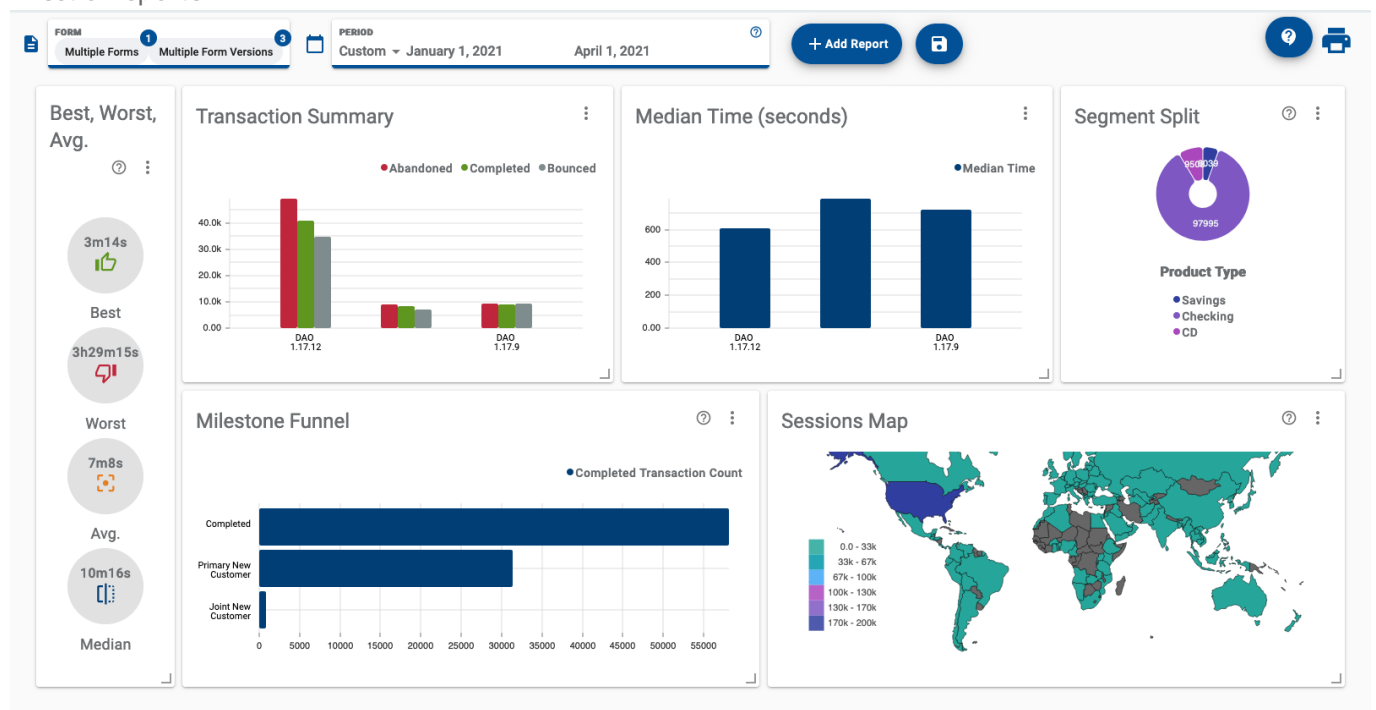
Customize your view

Use these actions to craft your view:

Add Report button - Use this button to select additional reports to add to the view.

Rearrange reports - Click and drag any report to change its position in the view.

Resize corners - Click and drag the bottom-right corner of any report to resize it in the view.

Report Configuration - For many reports, additional configuration options are available to modify how the report is displayed. Click ⋮ in the top-right corner of any report to modify its configuration.

Save button - Use this button and dialog to save and retrieve your reports.

> Saving a Custom Reports set is currently confined to the browser local storage. So, if you open a new browser or clear your browser cache, you will not be able to retrieve your saved set of reports.

Available reports

Generally, a report targets a specific metric or type of metrics to provide specific insights into user behaviour. Refer to the list of examples below for details about how to use each available report.

- Best, Worst, Avg - gauge the best, worst and average time taken to complete applications within the selected scope.

- Completion Rate - examine application performance in terms of user completion for the selected scope in a bar chart.

- Duration Summary - compare and sort the best, worst, average, and median times to complete each version in the selected scope using a table.

- Median Time - compare the median time to complete each version in the selected scope as a bar chart.

- Milestone Funnel - compare standard and custom milestone hit rates for the selected scope with a bar chart.

- Section Completion - see completion across sections for the selected scope using a line graph.

- Section Summary - compare and sort by section-level stats for each version in the selected scope in a table.

- Segment Split - discover the breakdown of values of a segment type for all transactions within the selected scope using a pie chart.

- Segment Switch - examine how users traverse values of a segment type for all transactions within the selected scope using a sankey graph.

- Session Map - investigate the number of sessions occurring per country for the selected scope using a choropleth graph.

- Top Fields - compare and sort by field-level stats for each version in the selected scope in a table.

- Transaction Summary - compare Transaction Statuses for the selected scope using this bar chart.

Custom Reports View - Best, Worst, Avg

Journey Analytics | Analytics User | Latest Version

This simple report displays the best, worst and average time taken to complete the applications set by the Scope Selector. Use this information to gain a high-level understanding of the time it takes to complete an application or group of applications.
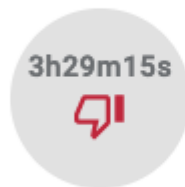
Configuration

Click ⋮ to modify the configuration options.

- **Format** - Change how durations are formatted on the chart.
- **Show Median** - Toggle to show median duration stats on the chart.
- **Show Avg** - Toggle to show average duration stats on the chart.

Example Analysis

In the example screenshot, multiple versions are selected via the Scope Selector so duration data for the entire selection is aggregated. Key takeaways are:

- The best, or fastest, transaction took about 3 mins and 14 seconds to complete.
- The worst, or slowest, transaction took almost 3.5 hours.
- On average, users complete the form in just over 7 minutes.
- The median time to complete is 10 minutes and 16 seconds.

Custom Reports View - Completion Rate

Journey Analytics | Analytics User | Latest Version

This versatile bar chart shows the rate at which users complete each application version or completion rates over time (by week or by month). Configuration options can be used to aggregate and split the chart in various ways.

Configuration
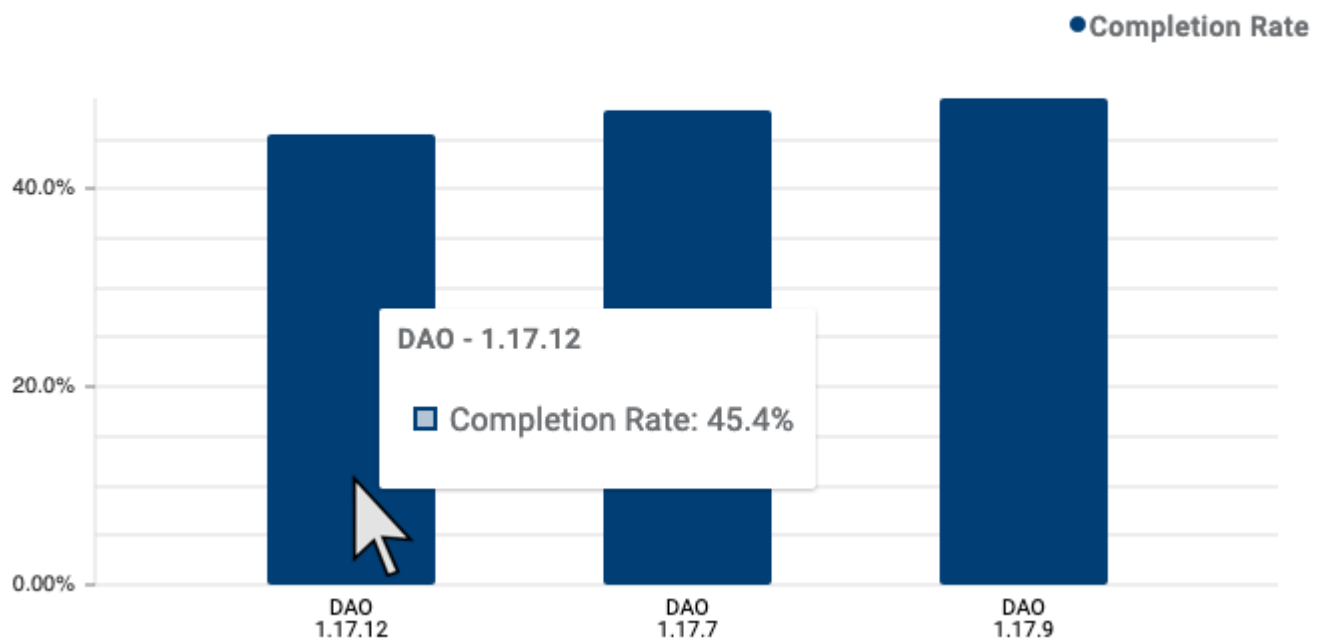
Click ⋮ to modify the configuration options.

- **Split By** - Toggle how the bars on the chart are grouped. Configure to show completion rates for each device type, form or form version.

- **Aggregate By** - Toggle how the x-axis is displayed. Select Week or Month to show change over time or use Form Version to view rates for each selected form version.

- **Enable Grids** - Toggle the grid markings on and off.

- **Max Legend Items** - Set the maximum number of legend items to display.

Example Analysis

In the example screenshot, multiple versions are selected via the Scope Selector, so completion rates can be compared across each version. Key takeaways are:

- The hover tooltip, and the Y-axis, shows a completion rate of 45.4% for version 1.17.12.

- Relative to other versions, the user completion rate has slightly decreased in the latest version, 1.17.12.

- Completion rates for the 1.17.9 version were better than any other version.

Custom Reports View - Duration Summary

Journey Analytics | Analytics User | Latest Version

Use this table to compare and sort Best, Worst, Avg. and Median time taken to complete each selected form version.

Duration Summary

	Form Version	Best	Worst	Avg.	Median ↑
1	DAO - 1.17.12	0:03:29	3:30:04	0:07:14	0:10:08
2	DAO - 1.17.9	0:03:45	1:47:37	0:08:24	0:12:04
3	DAO - 1.17.7	0:04:21	1:59:23	0:09:11	0:13:09

Configuration

- No configuration options.

Example Analysis

In the example screenshot, multiple versions are selected via the Scope Selector, duration data for each version is listed separately. Key takeaways are:

- DAO - 1.17.12 form version takes less time for most users to complete, as per the Best, Avg. and Median durations.
- At the same time, DAO - 1.17.12 form version also has the longest duration for any version, 3 hours 30 minutes and 4 seconds.

When optimizing the user experience with each new form version, best practice is to reduce the time users take to complete the application because longer journeys typically lead to higher abandonment rates. On the face of it, each new version has an improved time to complete, even though this latest version encountered the worst duration.

Custom Reports View - Median Time

Journey Analytics | Analytics User | Latest Version

This simple bar chart shows the median time in seconds it took to complete each selected application version.
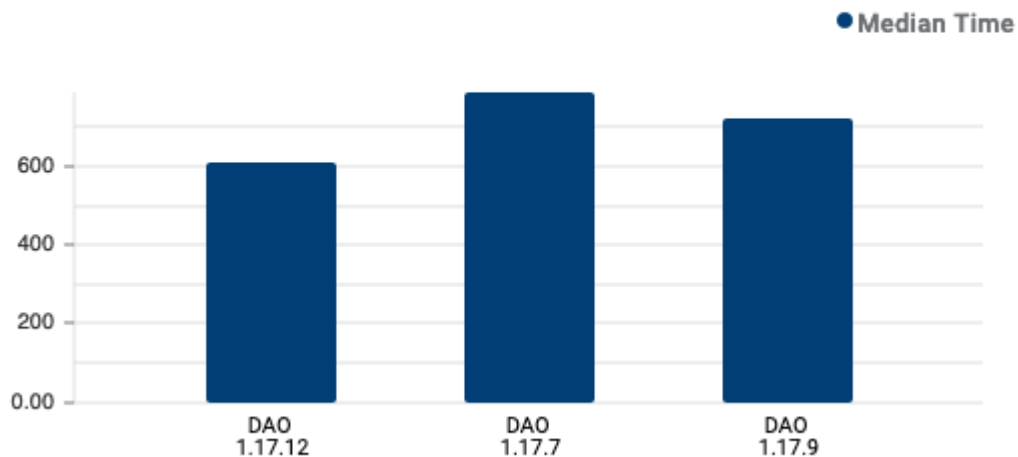
Configuration

Click ⋮ to modify the configuration option.

- **Enable Grids** - Toggle the grid markings on and off.

Example Analysis

In the example screenshot, three versions are selected via the Scope Selector, so the three form versions can be compared. Key takeaways are:

- It seems that version 1.17.12 is quicker for users to complete.
- Generally, the median time to complete each version has improved with each new form version.

This data supports the case that new optimizations are indeed working as expected to decrease the time users take to complete the application.

Custom Reports View - Milestone Funnel

Journey Analytics | Analytics User | Latest Version

This report displays the volume of transactions which reached each milestone selected in the report configuration. Use configuration to modify the target transaction status. By default, transaction volumes for Completed transactions are displayed.
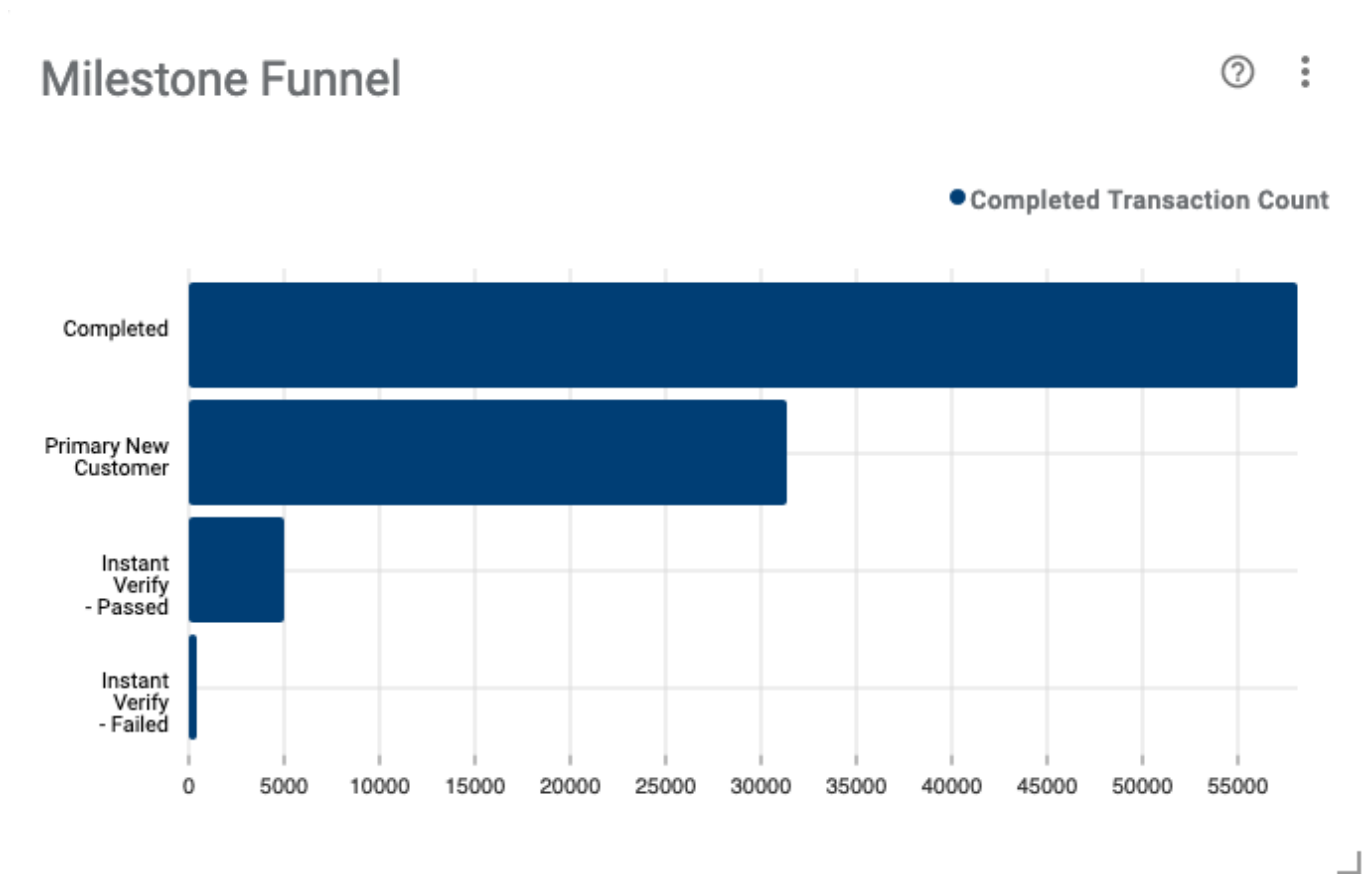
Configuration

Click ⋮ to modify the configuration options.

- **Transaction Status** - Choose the transaction status to target.
- **Milestones** - Select the milestones to show on the chart.
- **Enable Grids** - Toggle the grid markings on and off.

Example Analysis

In the example screenshot, multiple forms and versions are selected via the Scope Selector, so the chart includes transactions from all the selected forms and versions. Key takeaways are:

- More than 55,000 transactions reached the **Completed** milestone.
- About half of all **Completed** transactions (30k) reached the milestone called **Primary New Customer**.
- More transactions reached the **Instant Verify - Passed** milestone than reached the **Instant Verify - Failed** milestone.
- Compared to the volume of **Completed** transactions, it is apparent that not many transactions encountered the **Instant Verify** at all.

In this example, custom milestones were implemented to evaluate usage of a new **Instant Verify** feature. In evaluating the feature, it seems most users did not choose to use the capability. However, for those users who do attempt to use **Instant Verify**, most are able to reach the **Instant Verify - Pass** milestone.

> The milestone called **Completed** is standard milestone. You should make sure your custom milestone names do not clash with the reserved milestone name.

Custom Reports View - Section Completion

Journey Analytics | Analytics User | Latest Version

This line chart highlights the rate at which users complete sections. Colored lines are drawn for each selected form version.

The x-axis represents each section (excluding modals and dialogs) and the y-axis and hover tooltip displays the rate of completion. The section sequence is deduced from transaction counts and is ordered across the x-axis from left to right. Use the report configuration to target specific sections. When multiple applications are selected, a line for each version is drawn on the chart.
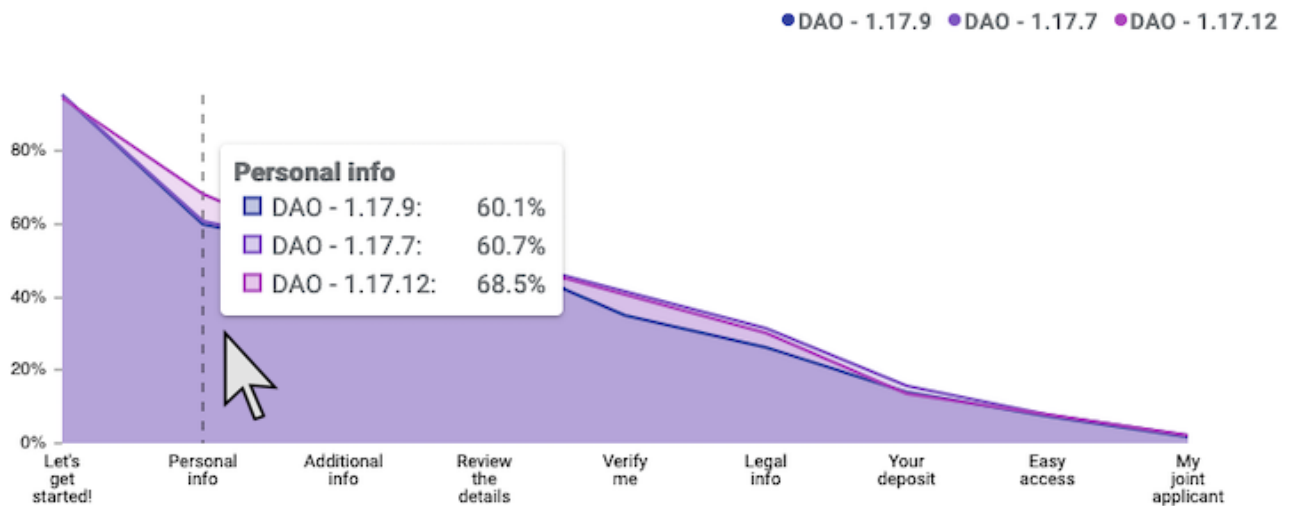
Configuration

Click ⋮ to modify the configuration options.

- **Enable Dot Labels** - Toggle display of rates for each section on the chart.
- **Sections** - Use this option to select which sections show on the chart. By default, all sections will display.
- **Max Legend Items** - Set the maximum number of legend items to display.

Example Analysis

In the example screenshot, multiple versions are selected via the Scope Selector which causes the chart draw different color trend lines for each version. Key takeaways are:

- As expected, we notice that most users are completing the sections which occur earlier in the journey like **Let's get started!** and **Personal info**.
- The least completed section at the end appears to be an optional section, only for joint applications, which would explain the lower number of completions.
- In the hover tooltip, we see the **Personal Info** section is associated with an increased completion rate of 68.5% for the latest version, 1.17.12.

Optimizations to the **Personal info** section appear to have led to more user completion for the section. This chart corroborates that those optimizations are working as intended.

Custom Reports View - Section Summary

Journey Analytics | Analytics User | Latest Version

This report is a table for comparing and sorting section-level stats for each section. Each table row lists the Section Name as well as the transaction counts for each form version. This data is presented as raw counts and makes it easier to compare the volume of transactions between the versions and sections.

Section Summary

⋮

Completed Transactions

	Section Name	DAO - 1.17.9	DAO - 1.17.7	DAO - 1.17.12 ↓
1	Let's get started!	17074	16113	**84142**
2	Personal info	10738	10248	**60797**
3	Additional info	9379	8867	**46224**
4	Review the details	9238	8759	**45627**
5	Verify me	6252	7030	**36096**
6	Legal info	4666	5332	**26814**
7	Your deposit	2492	2701	**12264**
8	Easy access	1318	1359	**6988**
9	My joint applicant	350	372	**1939**

Configuration

Click ⋮ to modify the configuration options.

- **Metric** - Choose the transaction status or metric to target.
- **Commenced Transactions** - Show the number of transactions which started the section.
- **Completed Transactions** - Show the number of transactions which completed the section.
- **Field Count** - Show the number of fields within each section.
- **Abandoned Transactions** - Show the number transactions in which the section was the point of abandonment. This indicates it was the last section to receive user interaction before the user abandoned.

Example Analysis

In the example screenshot, three form versions are selected via the Scope Selector, so three columns are shown in the table. Key takeaways are:

- The table has been sorted by version DAO - 1.17.12 to highlight completed transaction counts from high to low.
- The bold values indicate the highest value for the section.
- The number of transactions associated with DAO - 1.17.12 is much greater compared to other versions.
- A relatively small volume of transactions completed the section called My joint applicant.

Custom Reports View - Segment Split

Journey Analytics | Analytics User | Latest Version

This pie chart shows the breakdown of segment values that were received for a specific segmentation, or segment type, for transactions within the selected scope. The visualization can be used to evaluate and measure segment values that occur during transactions.
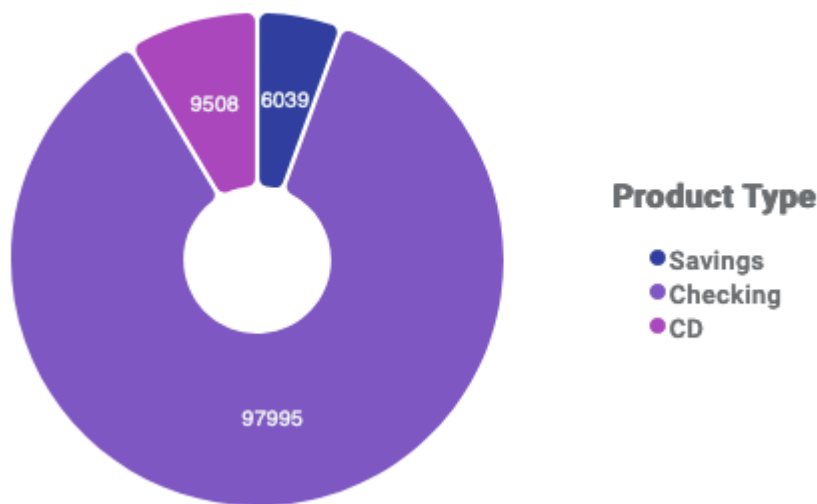
Configuration

Click ⋮ to modify the configuration options.

- **Segment** - Set the segmentation, or segment type, to target. Available options are based on the selected form.
- **Group Smallest Values** - If many segment values exist, use this option to group lower values as **Others**.
- **Max Legend Items** - Set the maximum number of legend items, or segment values, to display.

Example Analysis

In the example screenshot, multiple versions are selected via the Scope Selector, so segmentation data from all selected applications display in a single pie chart. Key takeaways are:

- The pie chart shows a breakdown of segment values within the **Product Type** segment type.
- For transactions with **Product Type** segment types, segment values include **Savings**, **Checking** and **CD**.
- The chart indicates that most of the **Product Type** segmentation is from users applying for **Checking** accounts.

Custom Reports View - Segment Switch

Journey Analytics | Analytics User | Latest Version

This sankey chart, or flow diagram, highlights how segment values, within a specific segment type, change during transactions. The visualization shows the flow from initial segment values to final segment values for the selected segment type. This chart is used to evaluate and measure improvements for segment switching.
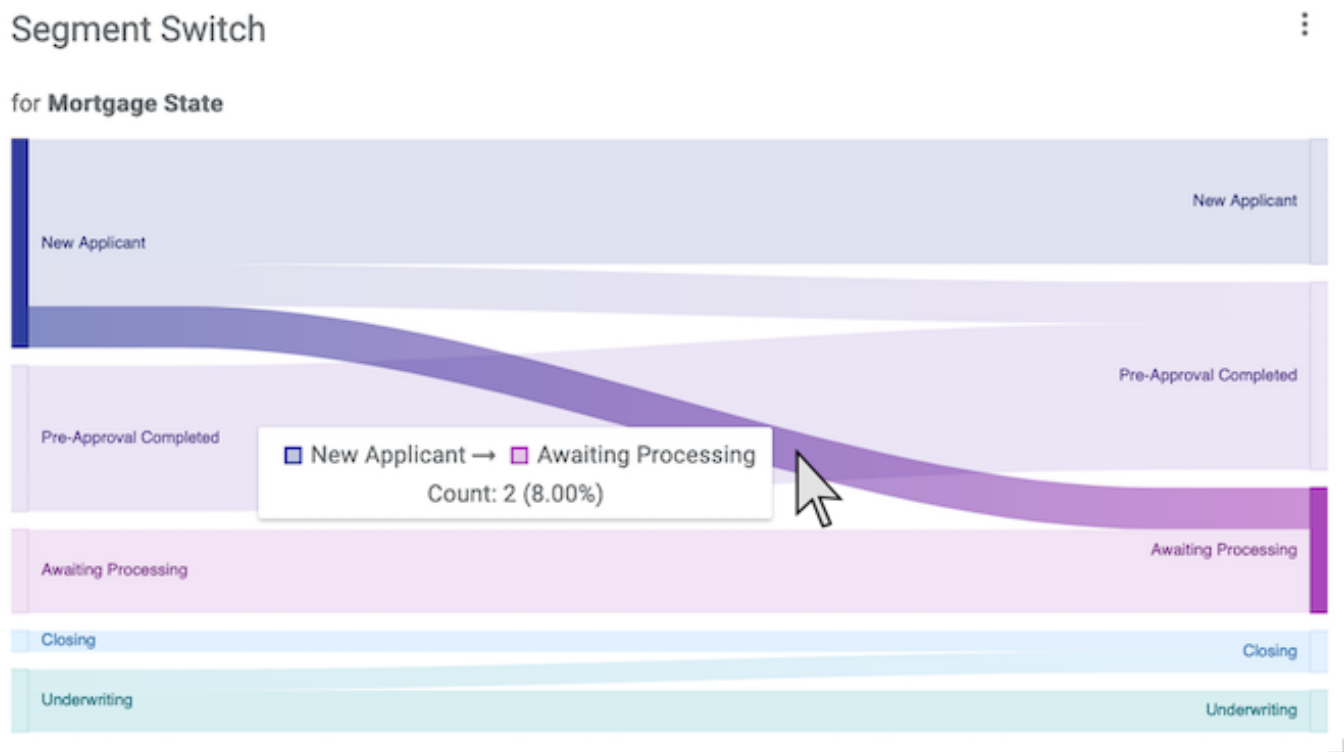
Configuration

Click ⋮ to modify the configuration option.

- **Segment** - Set the segmentation, or segment type, to target. Available options are based on the selected form.

Example Analysis

In the example screenshot, multiple versions are selected via the Scope Selector, so segment data for the entire selection is shown in a single chart. Key takeaways are:

- The chart shows how segment values change over the course of a transaction for the segment type called **Mortgage State**. The segment type tracks end users' mortgage status throughout the transaction.

- The hover tooltip shows that 8%, or two transactions, began with the **New Applicant** segment value and then ended the transaction with **Awaiting Processing**.

- Some user transactions transitioned from **New Applicant** to **Pre-Approval Completed**.

- Some user transactions also transitioned from **Underwriting** to **Closing**.

This graph suggests that most users start and end the transaction without transitioning through **Mortgage Status** segment values. Generally, users appear to struggle to advance their status within a single transaction.

Custom Reports View - Session Map

This choropleth map indicates the number of sessions occurring per country. A single transaction may be comprised of one or more sessions, such as when a user saves and resumes a transaction. This information can be used to evaluate global engagement and understand which locations users are coming from.
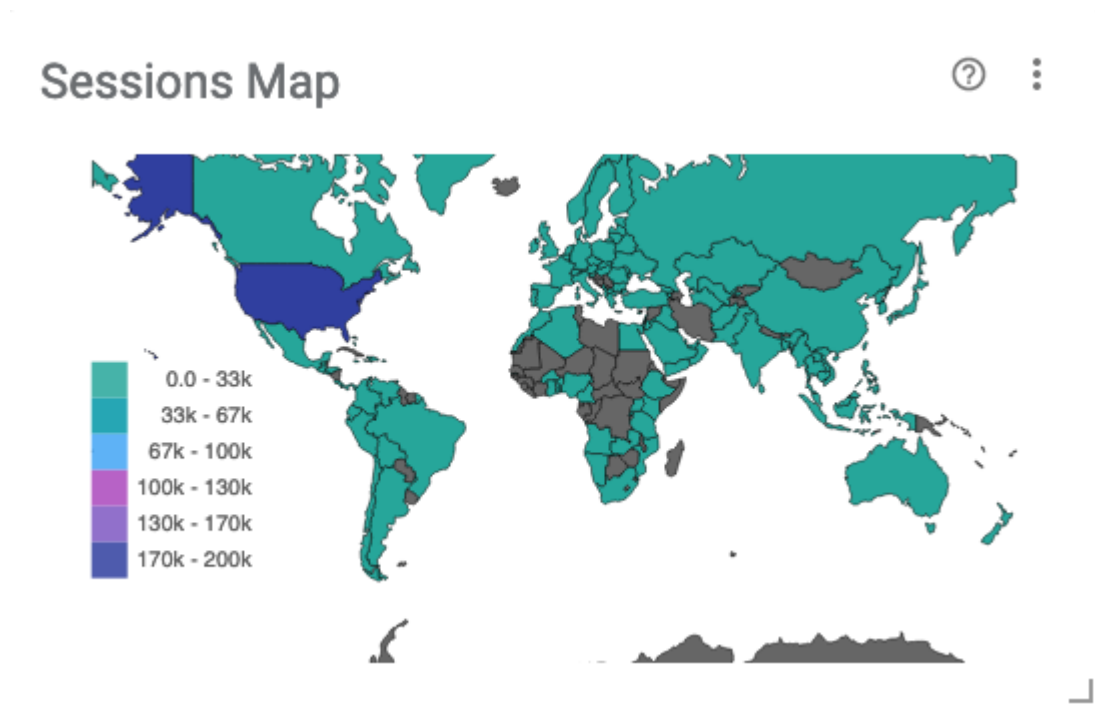
Configuration

- No configuration options.

Example Analysis

In the example screenshot, multiple versions are selected via the Scope Selector, so the number of sessions for all selected forms displays on the map. Key takeaways are:

- It seems clear from the chart that most sessions were from users located in USA.
- It appears that no sessions were from users located in central Africa or Antarctica, indicated by grey.

Custom Reports View - Top Fields

Journey Analytics | Analytics User | Latest Version

This report is a table for comparing and sorting field-level stats such as Abandonment, Completion rate, or Median Time to complete transactions. This data is presented as raw counts and can be used to compare the volume of transactions between the versions.

Top Fields

by Abandoned Count

	Field	DAO - 1.17.9	DAO - 1.17.7	DAO - 1.17.12 ↓
1	Social Security Number	336	382	**6684**
2	Would you like an individual or joint account?	1210	1079	**5519**
3	Yes, I am	1319	1267	**5300**
4	I've lived at this address for less than a year	40	24	**2677**
5	Promo Code	171	158	**1849**
6	Date of Birth	251	202	**1638**
7	First name	313	271	**1566**
8	Suffix	43	46	**1375**
9	Which of the following best describes your occupation?	—	—	**1213**

Configuration

Click ⁝ to modify the configuration options.

- **Metric** - Choose the transaction status or metric to target.
- **Abandonment** - Shows the number of abandoned transactions in which the field was the last to receive user interaction.
- **Completion** - Shows the number of times each field was completed.
- **Median Times** - The median time it took to complete each field.
- **Label Fields By** - Change the labels to use field path or name.
- **Limit** - Specify a limit to the number of fields shown.

Example Analysis

In the example screenshot, because three versions are selected via the Scope Selector, the three form versions' field-level statistics can be compared. Key takeaways are:

- The configured metric is **Abandonment** which shows **Abandoned Count** for each field. This shows the number of abandoned transactions in which this field was the last to receive user interaction (before the user abandoned).

- The bold values indicate the highest value for the field.

- The table has been sorted to show abandonment counts for DAO - 1.17.12 from high to low.

- For DAO - 1.17.12, the **Social Security Number** field seems to have rather poor performance relative to other fields.

The high abandonment could be due many factors but the **Social Security Number** field is indicated as an investigative starting point.

Custom Reports View - Transaction Summary

Journey Analytics | Analytics User | Latest Version

This simple grouped bar chart displays Abandoned, Completed and Bounced transaction status counts for each selected form version. It is useful for comparing the volume of transactions, and transaction statuses, between the versions.
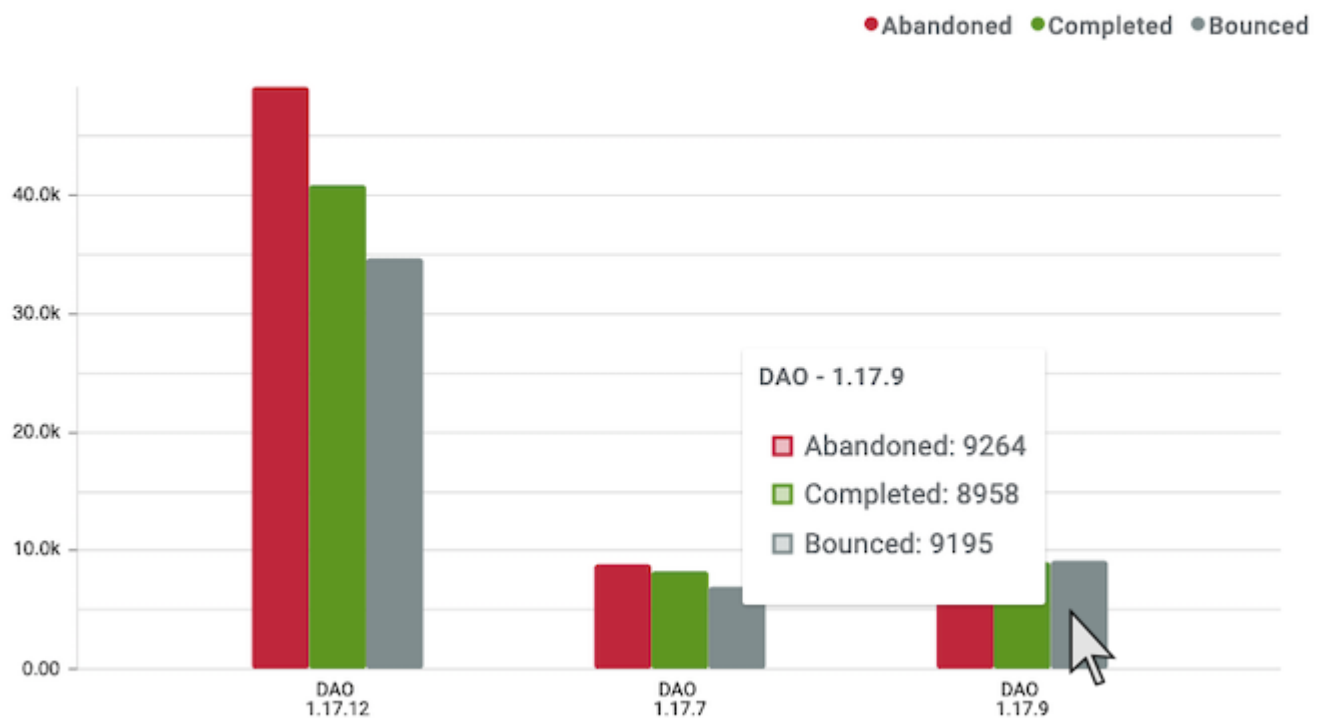
Configuration

Click ⋮ to modify the configuration option.

- **Enable Grids** - Toggle the grid markings on and off.

Example Analysis

In the example screenshot, multiple form versions are selected via the Scope Selector, so transaction statuses for each version display. Key takeaways are:

- The hover tooltip, and the y-axis, indicate the number of Abandoned, Completed and Bounced transactions for version DAO - 1.17.9 of the form.
- It appears that there was a significant increase across all types of transactions in version DAO - 1.17.12.

Version DAO - 1.17.12 saw much more overall user traffic than the other versions. Perhaps, this increase in traffic demonstrates the success of a new campaign launched with that version.

User Journey View Overview

Journey Analytics | Analytics User | Latest Version

The Journey Analytics User Journey View is available from v18.05 and presents an easy to follow diagram that illustrates all possible journey paths taken by users through an application. The User Journey View is built by selecting one or more custom milestones pre-configured and sent via Milestone APIs from a Maestro, Composer or Open UX application, or in a groovy/fluent service on Journey Manager.

Important:

- Each node in the journey graph represents a milestone implemented in the Maestro, Composer or Open UX application or in a groovy/fluent service on Journey Manager.
- At each milestone, the number of users who reached this point in the journey are shown as a percentage.
- Also, the number of users who reached this milestone, and dropped out of the application, are shown as a percentage.
- Additional metrics are presented in a popover when a milestone is selected.
- Segmentation charts can also be added at each milestone.
- The users reaching a milestone can be segmented by adding a segmentation chart on that milestone. The segmentation charts are built using segments pre-configured and sent via Segment APIs from a Maestro, Composer or Open UX application, in a groovy/fluent service on Journey Manager, or through URL parameters.
- Any number of segmentation charts can be added, on any milestone, as long as they are pre-configured.

User Journey View

Approved | Declined | MiTek ID Scan | Equifax IDMatrix Verified | Lead Created | Photo ID Scan | ▼ | **OK**

STARTED — 100% Reached — 10.0% Dropped

10.0% | 45.0% | 35.0%

Linked Account Prefill — 35.0% Reached — 0.00% Dropped

35.0%

Lead Created — 80.0% Reached — 10.0% Dropped

20.0% | 50.0%

Time to Reach
0:03:02

87.5% PROGRESSED

45.0% COMPLETED APPLICATION

⊕ **Add Segmentation**

MiTek ID Scan — 50.0% Reached — 10.0% Dropped

40.0%

Returning Customer — 10.0% Reached — 1.00% Dropped

Green ID Verification — 60.0% Reached — 5.00% Dropped

9.00% | 55.0%

Product Selected — 64.0% Reached — 24.0% Dropped

Tip

To monitor changes to User Journeys over time, it is recommended to use form versioning in Maestro to isolate particular versions of a form, and to carefully select the timeframes the specific form versions were in use, to use as a comparison.

Video

Watch the video for an introduction to the User Journey View, Milestones and Segments.

Next

Next, learn about Using the User Journey View and How to Send Custom Milestones and Segments.

Using the User Journey View

Journey Analytics | Analytics User | Latest Version

To access the User Journey View of Journey Analytics:

1. Select **User Journeys** from the Navigation Panel.

2. Select the application and time period to analyze.

> To monitor changes to User Journeys over time, it is recommended to use form versioning in Maestro to isolate particular versions of a form, and to carefully select the timeframes the specific form versions were in use, to use as a comparison.

3. The User Journey View displays with just the Start and Finish milestones.
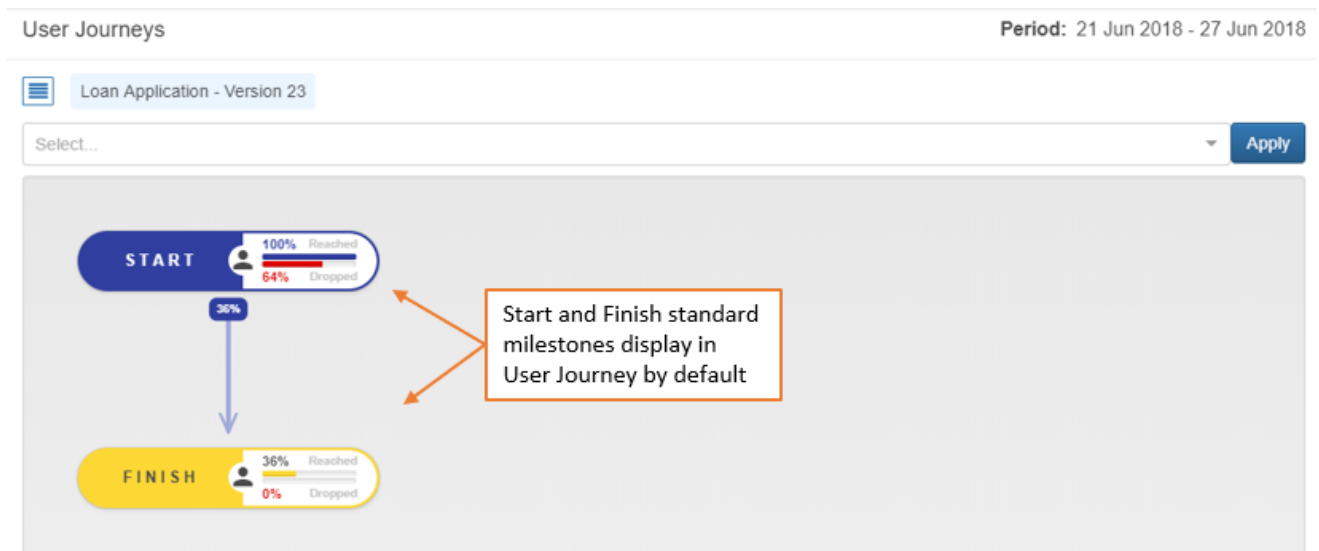
4. Select the pre-configured custom milestones in the application from the **Milestones** dropdown menu.

5. Click **Apply** or **OK** to add those milestones to the User Journey View.

6. The User Journey View now shows the custom milestones in the application.

Latest   Legacy

Approved | Declined | MiTek ID Scan | Equifax IDMatrix Verified | Lead Created | Photo ID Scan | ▼ | **OK**

STARTED
100% Reached
10.0% Dropped

10.0% | 45.0% | 35.0%

Linked Account Prefill
35.0% Reached
0.00% Dropped

35.0%

Lead Created
80.0% Reached
10.0% Dropped

20.0% | 50.0%

Time to Reach
0:03:02

87.5% PROGRESSED

45.0% COMPLETED APPLICATION

⊕ Add Segmentation

MiTek ID Scan
50.0% Reached
10.0% Dropped

40.0%

Returning Customer
10.0% Reached
1.00% Dropped

9.00%

Green ID Verification
60.0% Reached
5.00% Dropped

55.0%

Product Selected
64.0% Reached
24.0% Dropped
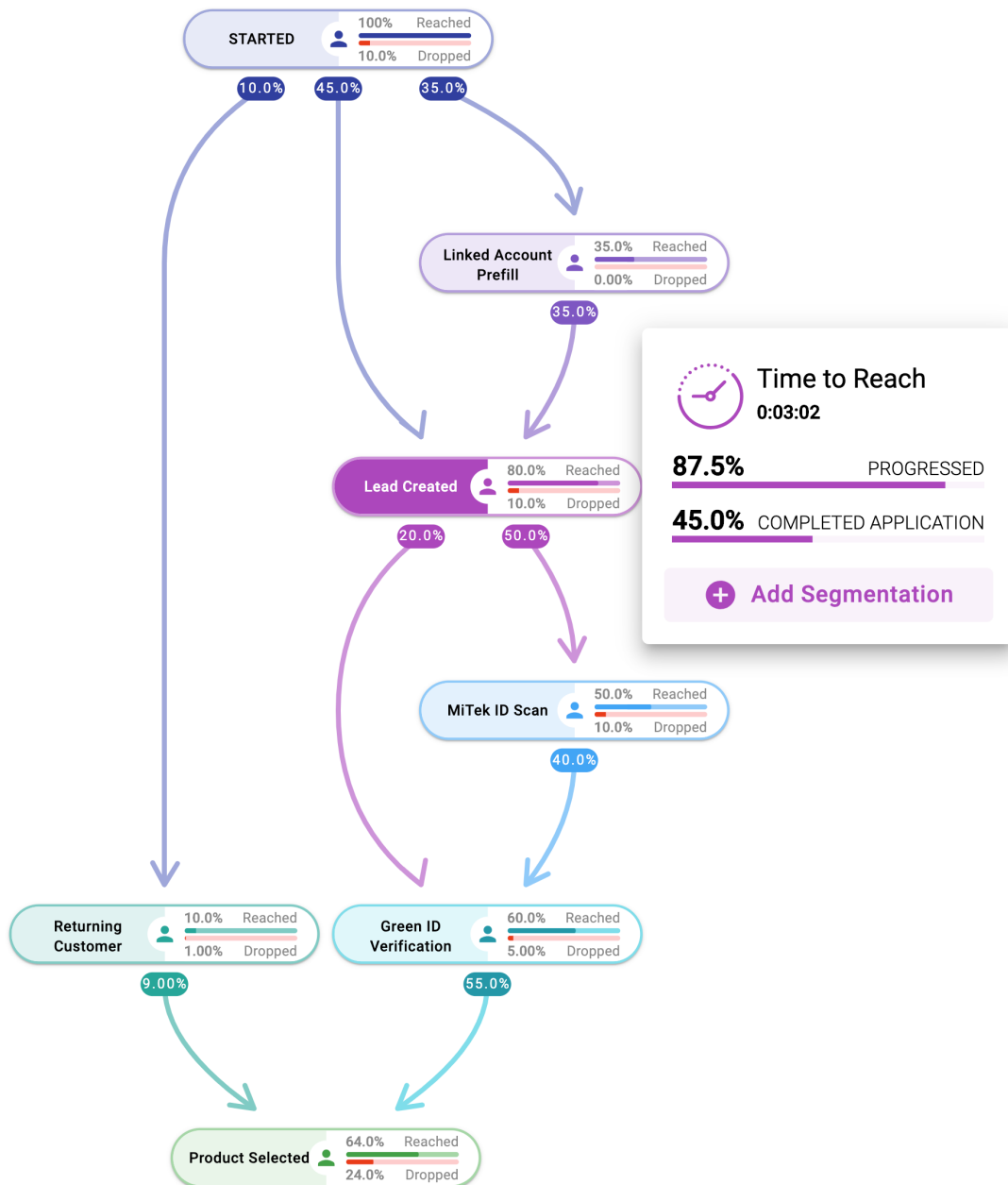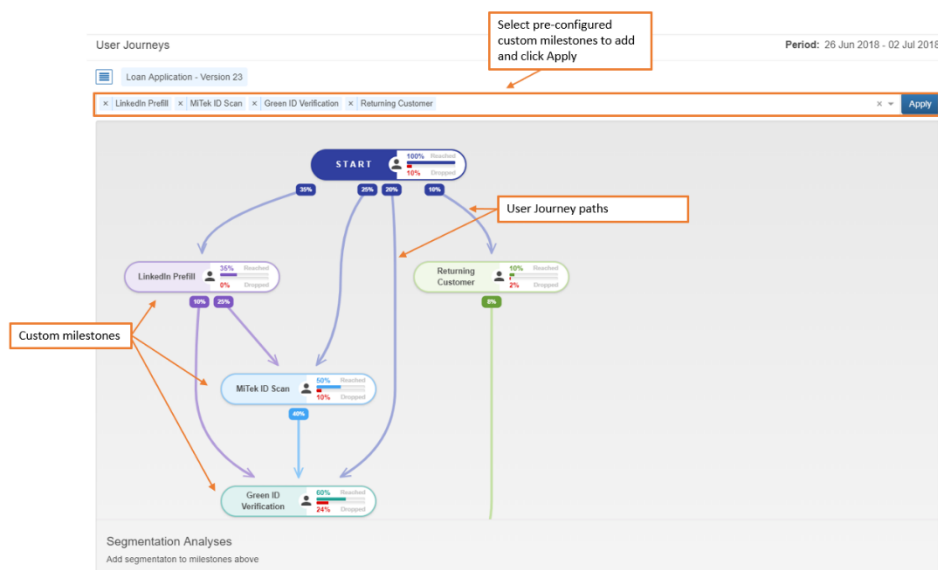
In this example, LinkedIn Prefill, MiTek ID Scan, Green ID Verification and Returning Customer custom milestones were selected and now appear in the User Journey View.

By adding the custom milestones it is now possible to see how users are progressing through the different paths towards the eventual completion of the application.

The percentage on the User Journey path represents the number of users that took that path to the next milestone. Hover over the individual milestones and paths to highlight them.

Additional milestone metrics

To understand the impact of a milestone on application completion rates, click on the milestone to display more useful metrics.

Latest   Legacy
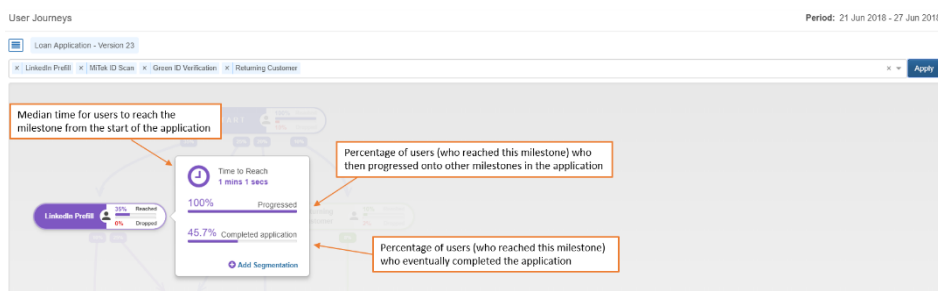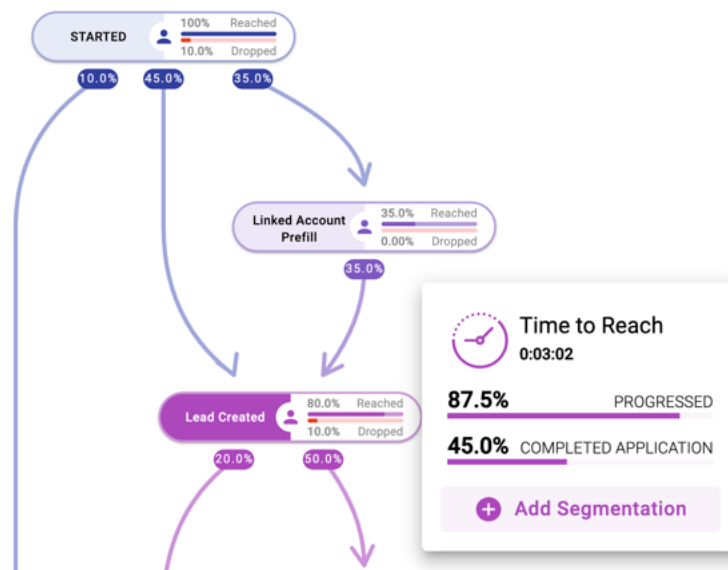
Additional metrics:

- Median time for users to reach the milestone from the start of the application.
- Percentage of users, who reached this milestone, who then progressed onto other milestones in the application.
- Percentage of users, who reached this milestone, who eventually completed the application.

On the popup, use the Add Segmentation link to segment the users who reached this milestone by adding a segmentation chart.

> To move around a large User Journey View with multiple milestones, hover over the milestones and user journey paths to highlight them, and scroll to zoom in and out. To move the User Journey View around the screen, click and drag the diagram.

Add Segmentation Charts

If you have broken up your users into segments or groups by sending Segment APIs from a Maestro, Composer or Open UX application, in a groovy/fluent service on Journey Manager, or through URL parameters, you can also perform segmentation analysis in this view.

Segmentation analysis is a powerful tool that helps understand the behavior of a group of users who share common characteristics. You can identify what group of users abandon the application and at what stage of the journey and understand key metrics for each group of users that have reached a specific milestone. Using this feature, you can slice and dice the data to improve the granularity of the analysis.

To add a segmentation chart for a milestone, click on the Add Segmentation link on the milestone, select the pre-configured segment name from the dropdown, and then click **Apply.**
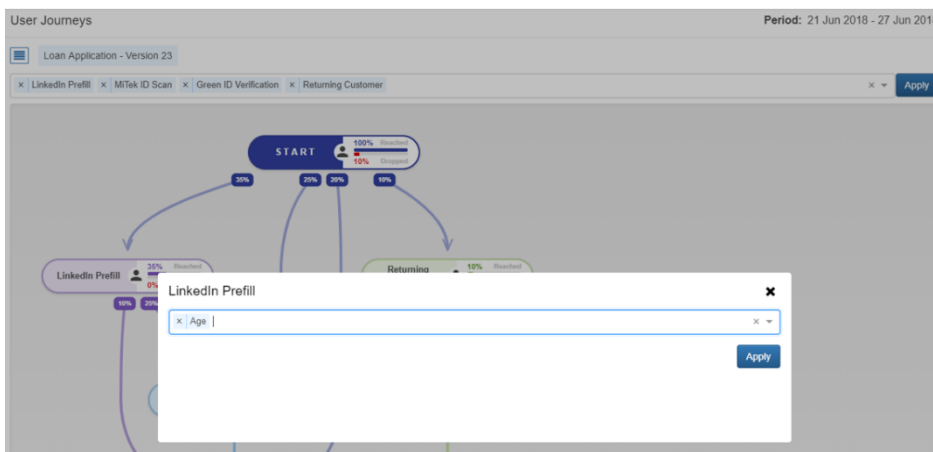
The segmentation chart for that milestone will display at the bottom of the screen. In this example, the Age segmentation chart was added to the LinkedIn Prefill milestone.

Latest   Legacy
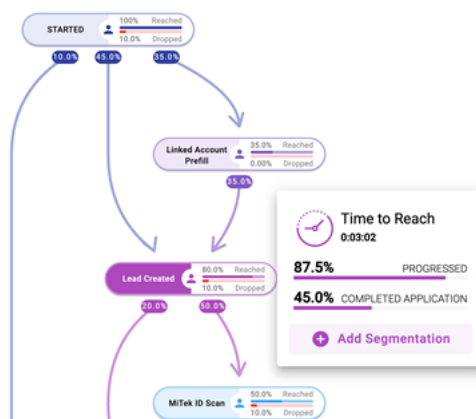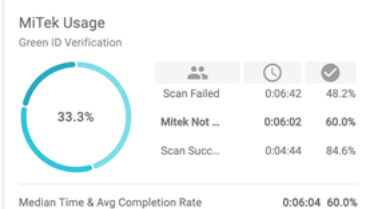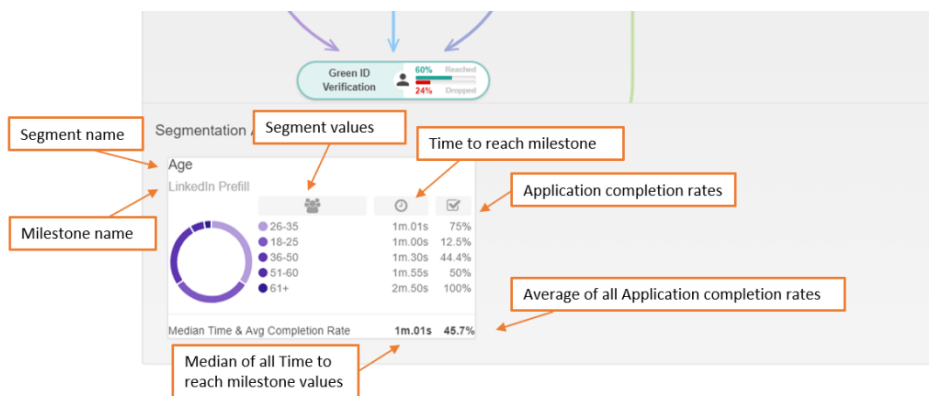
Metrics in segmentation charts

Metrics	Icon	Description
Segment		The Segment column displays the segment values sent via Segment APIs from a Maestro, Composer or Open UX application, in a groovy/fluent service on Journey Manager or through URL parameters.
Time		The Time to reach milestone column displays the time it took each group of users (segments) to reach this milestone from the start of the application. Use this metric to identify any bottlenecks in the user journey. Legend: d=days h=hours m=minutes s=seconds.
Application completion rate		The Application completion rate column displays the percentage of each group of users (segments) who eventually completed the application. Use this metric to determine which group of users (segment) has a better probability of eventually completing the application. There may be a reason why a certain age bracket of users took another path through the application, such as young or mature users do not have a LinkedIn profile, or existing customers find it easier to navigate through an application if their account details are pre-populated during the application process. In the above example 75% of the users in the 26-35 age bracket went on to complete the application, 44.4% of the 36-50 age bracket went on to complete the application, and 100% of the 61+ age bracket went on to the complete the application.
Median Time		The Median time metric is the middle value of all segment time values displayed for this milestone.
Avg Completion Rate		The Average completion rate metric averages the completion rates for all segments displayed for this milestone.

Any number of segmentation charts can be added, on any milestone, as long as they have been pre-configured. It is recommended to show the same segmentation chart for each milestone in the User Journey View to identify how the different users respond at different points throughout the user journey.

Video

Watch the video for more information on how to read the metrics in this view.

Next

Next, learn How to Send Custom Milestones and Segments. Also check the Compatibility table, as custom milestone and segment functionality is dependent on the Manager, Maestro and Composer versions.

How to send Custom Milestones and Segments

Journey Analytics | Analytics User | Latest Version

It is important to implement the correct logic to send custom milestones and segments in Maestro/Composer/Journey Manager **before** the application is live, as the User Journey View is built using these custom milestone and segment events.

Choose from the list below to find out how to send custom milestone and segment events from each product.

Maestro

| 5.1 & Higher

Send Custom Milestones from Maestro Applications

Send Segments from Maestro Applications

Composer

| v4.4 & Higher

Send Custom Milestones from Composer Applications

Send Segments from Composer Applications

Journey Manager

| 17.10

Send Custom Milestones from Journey Manager

| 18.05

Send Segments from Journey Manager

Milestones vs Segments

Milestones vs Segments

When to Use What?

Deciding between Milestones and Segments

Compatibility

Check the Compatibility table to identify what product versions are required to support custom milestones and segments.

User Journey View Compatibility

Journey Analytics | Analytics User | Latest Version

The User Journey View is available in Journey Analytics from v18.05 onwards. As User Journeys are built using custom milestone and segment events sent from Maestro, Composer or Journey Manager, it is important to check the compatibility table to see from which version you can send these custom events.

Source of custom event	Custom event	Design Tool version (Maestro or Composer)	Journey Manager version
To send from a Maestro form	Milestones	From Maestro 5.1	From 5.0.7
	Segments	From Maestro 5.1	From 5.0.7
To send from a Composer form	Milestones	From Composer 4.4	From 5.0.7
	Segments	From Composer 4.4	From 5.0.7
To send from Journey Manager	Milestones	-	From 17.10
	Segments	-	From 18.05

User Journey View Examples

Journey Analytics | Analytics User | Latest Version

The following examples illustrate the value that can be gained from configuring milestones and segments and using them to enhance the granularity of data provided in the User Journey View in Journey Analytics.

Example 1

Goals

- To determine the cost effectiveness of third party service fees for two Exchange packages, a financial verification service and a prefill service.
- Also to identify which age brackets are more likely to use these services, and how often, when completing their applications.

Milestones and segments required

Configure the following milestones and segments.

Type	Required
Custom milestones	LinkedIn Prefill
	Product Selected
	Link Back Account
	Financial Verified
Segments	Age 18-25
	Age 26-35
	Age 36-50
	Age 51-60
	Age 61+

Always add segments to the Whitelist segments filter in Preferences otherwise they will not flow through into Journey Analytics.

Results in the User Journey View
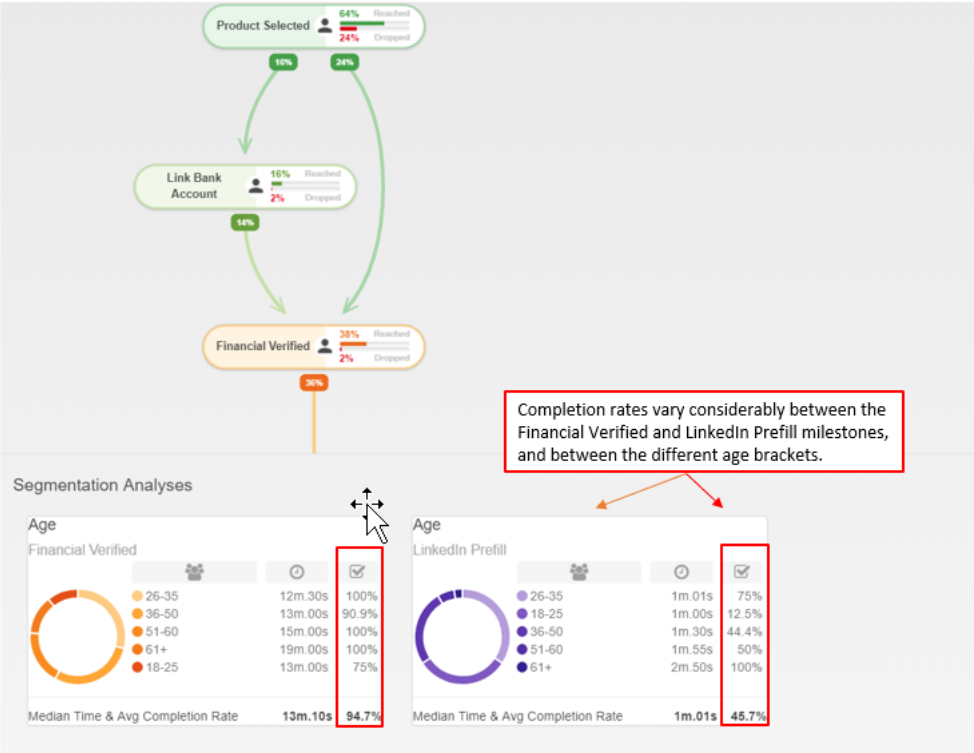
Example 2

Goals

- To determine the cost effectiveness of third party service fees for ID Scan and ID Verification Exchange packages, and identify how many ID verifications are successful and how many fail.
- Also to identify which age brackets are more likely to use these services, and how often, when completing their applications.

Milestones and segments required

Configure the following milestones and segments.

Type	Required
Custom milestones	Approved
	Declined
	MiTek ID Scan
	Equifax IDMatrix Verified
	Lead Created
	PhotoID Scan

	Age 18-25
	Age 26-35
	Age 36-50
	Age 51-60
	Age 61+
Segments	Mitek Usage Scan Failed
	Mitek Usage Mitek Not Completed
	Mitek Usage Scan Successful
	Equifax IDMatrix Verified Successful
	Equifax IDMatrix Verified Out of Wall
	Equifax IDMatrix Verified Failed

Always add segments to the Whitelist segments filter in Preferences otherwise they will not flow through into Journey Analytics.

Results in the User Journey View

User Journey

[Approved] [Declined] [MiTek ID Scan] [Equifax IDMatrix Verified] [Lead Created] [Photo ID Scan] [▼]   OK

STARTED
100% Reached
10.0% Dropped

10.0%   45.0%   35.0%

Linked Account Prefill
35.0% Reached
0.00% Dropped

35.0%

Time to Reach
0:03:02

87.5%   PROGRESSED

45.0%   COMPLETED APPLICATION

⊕ Add Segmentation

Lead Created
80.0% Reached
10.0% Dropped

20.0%   50.0%

MiTek ID Scan
50.0% Reached
10.0% Dropped

40.0%

Returning Customer
10.0% Reached
1.00% Dropped

9.00%

Green ID Verification
60.0% Reached
5.00% Dropped

55.0%

Product Selected
64.0% Reached
24.0% Dropped

Segmentation Analyses

Age
MiTek ID Scan

	👥	🕐	✓
	34.3%		
26-35	**26-35**	0:03:40	75.0%
18-25	18-25	0:03:00	12.5%
36-50	36-50	0:03:50	44.4%
51-60	51-60	0:04:40	50.0%
61+	61+	0:05:10	100%

Median Time & Avg Completion Rate   **0:03:42 45.7%**

MiTek Usage
Green ID Verification

	👥	🕐	✓
33.3%	Scan Failed	0:06:42	48.2%
	Mitek Not ...	**0:06:02**	**60.0%**
	Scan Succ...	0:04:44	84.6%

Median Time & Avg Completion Rate   **0:06:04 60.0%**

ID Verification Outcome
Green ID Verification

	👥	🕐	✓
33.3%	Successful	0:05:59	45.7%
	Out of Wall...	**0:08:04**	**60.0%**
	Failed	0:05:40	0.00%

Median Time & Avg Completion Rate   **0:06:04 50.9%**

Collaboration Jobs View Overview

Journey Analytics | Analytics User | Latest Version

The Collaboration Jobs View uses a node graph to represent the Collaboration Job workflow, and provides a view into key metrics at the job, step, action, section and field level. The Collaboration Job workflows are built using configured collaboration jobs in Manager.

Important:

- Each node in the collaboration job graph represents a step configured in the Collaboration Job in Manager.

- At each step, the number of transactions who reached this point in the journey are shown as a percentage.

- Also, the number of transactions who reached this step, and dropped out of the application, are shown as a percentage.

- Transactions are included regardless of their status as long as 1 step has been completed.

- Dates specified in the period selector filter transactions using the start date of the first step.

- Additional statistics are presented to the side when a step is selected.

- You can also dive into the step details by clicking within the step details.

- For steps that include customer interactions like forms or applications, you can also further navigate into the Field Analysis, Dropoff, and User Journey Views.

Collaboration Job View
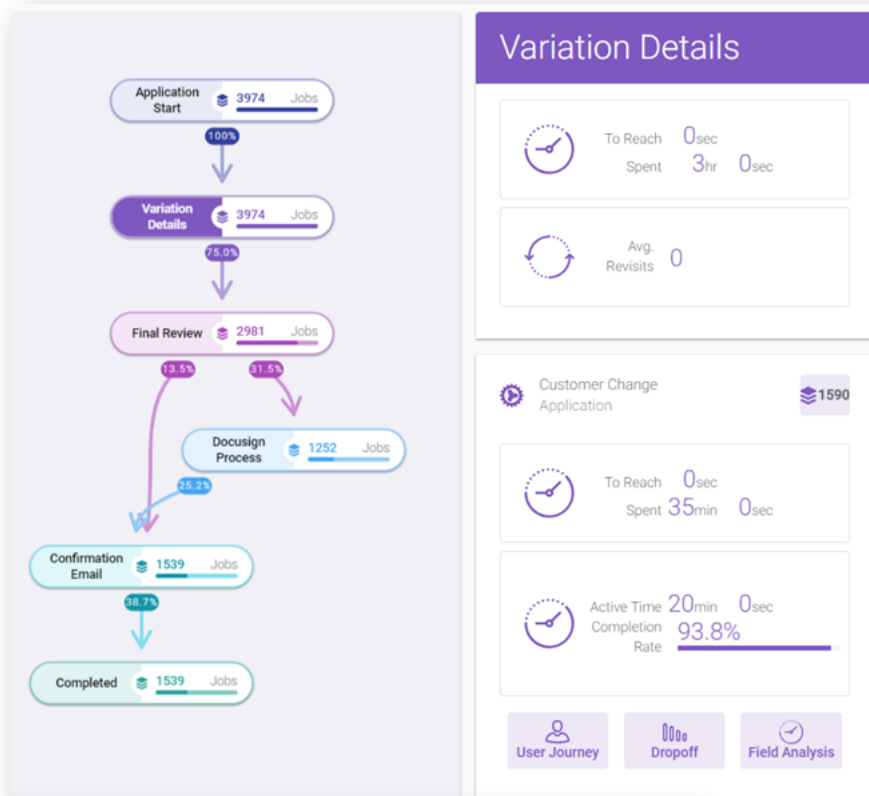
Configuration

Configuration in Manager and Maestro, to define the characteristics of the collaboration job, is required for the job to display in this view.

Enable Journey Analytics Collab Job Event collection

Assuming you already have a functioning collaboration job, the only configuration required to capture Journey Analytics events is to set a single parameter on the job service definition: **insightsEnabled** = true.

Video

Watch the video for an introduction to the new Collab Jobs View.

Next

Next, learn about Using the Collab Jobs View.

Using the Collaboration Jobs View

Journey Analytics | Analytics User | Latest Version

To access the Collaboration Jobs View of Journey Analytics, follow these steps:

1. Select **Collab Jobs** from the Navigation Panel.

2. Select the required collaboration job and time period to analyze.

3. The Collaboration Job View displays.
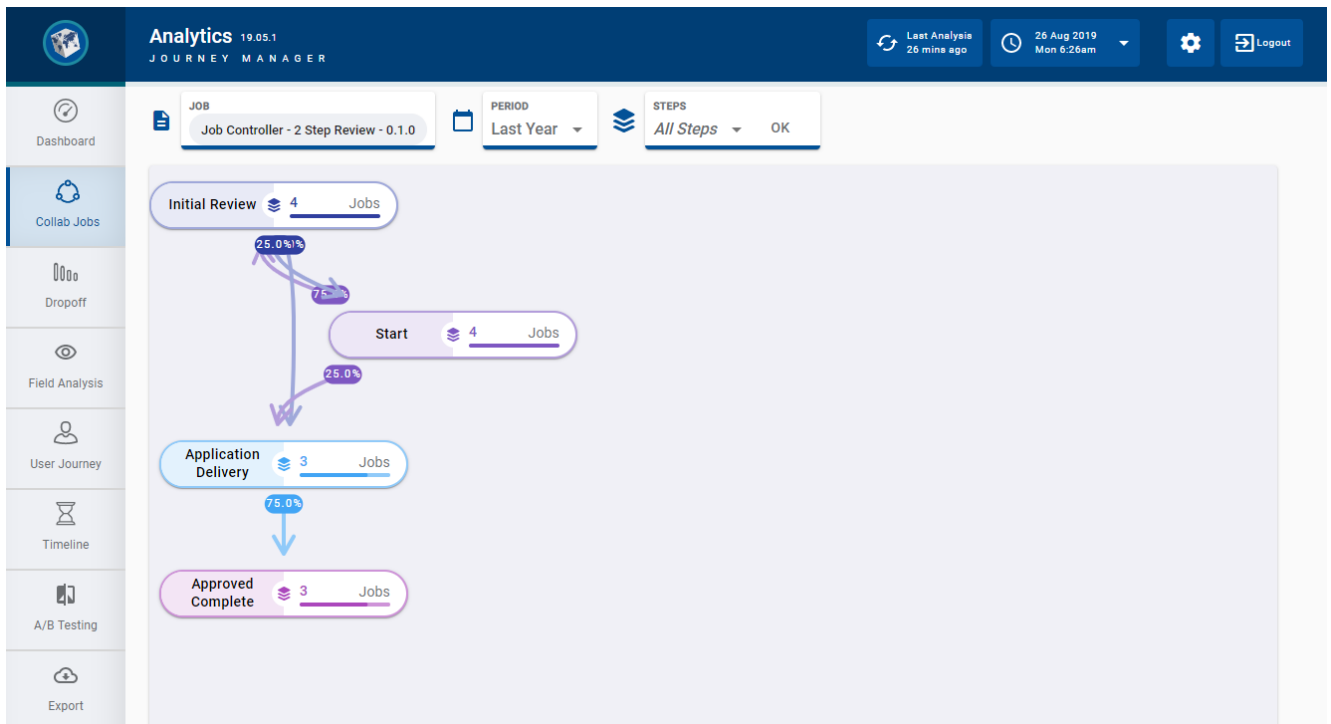
4. Optionally, select one or more configured collaboration job steps from the **Steps** selector and click **OK** to display only those steps in the graph.
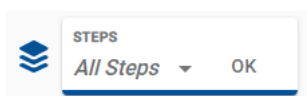
5. Click on the individual nodes to display the details for that step, and to further drill down into the Actions performed in that step.
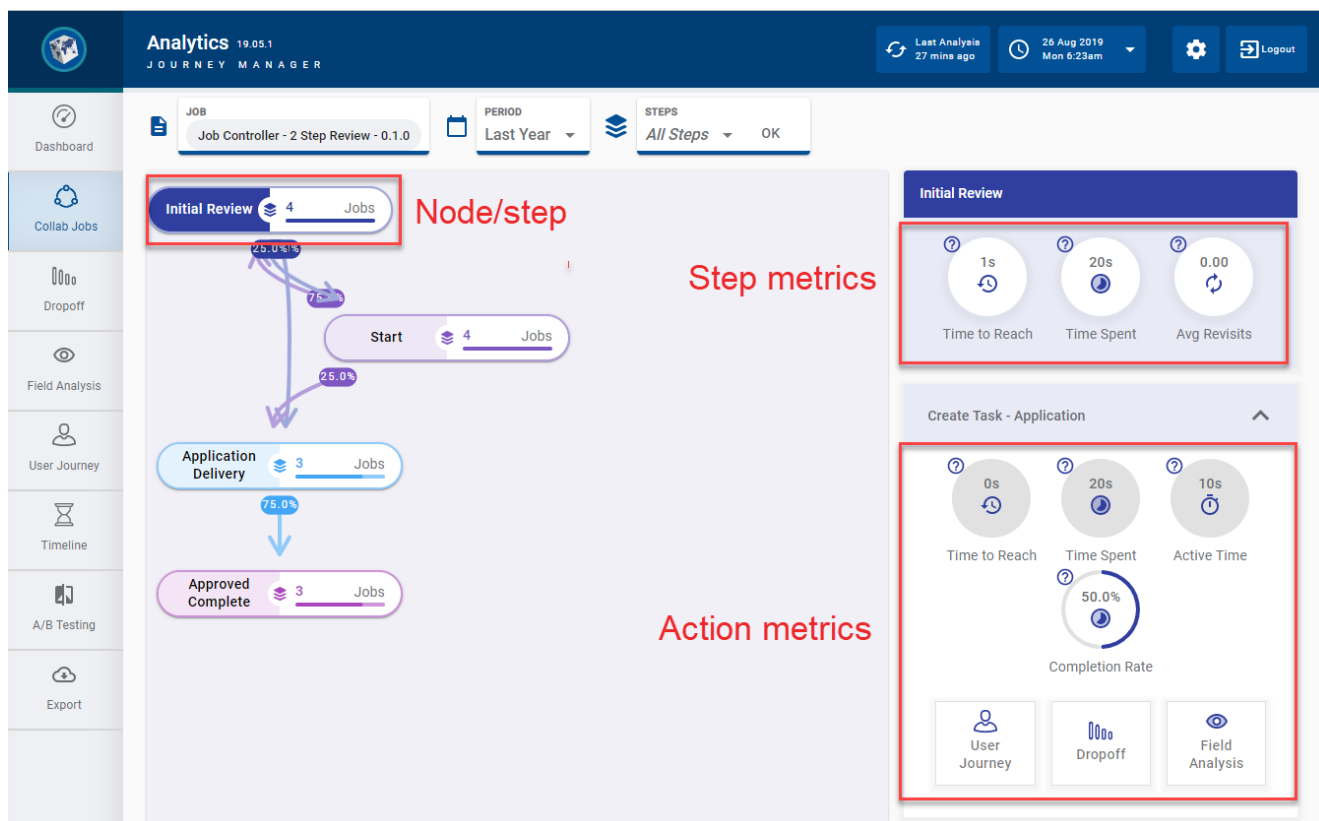
6. Hover over the question mark icons to view the definitions of each metric displayed. | 19.05

Step and action metrics

Metric	Description
Step	
Time to Reach	Median time to reach this step from the beginning of the job.
Time Spent	Median time for this step to complete from its creation.
Avg Revisits	The average number of times that the step was restarted within a single collaboration job transaction.
Action	
Time to Reach	Median time to reach the action from the beginning of the job.
Time Spent	Median time for the action to complete from its creation.
Active Time	The duration from the action's start to completion (not including wait time).
Completion Rate	The percentage of transactions for the action that were submitted.

To move around a large Collab Job View graph, hover over the nodes and paths to highlight them, and scroll to zoom in and out. To move the Collab Job View graph around the screen, click and drag the diagram.

Best Practices - Sending Custom Milestones

Journey Analytics | Analytics User | Latest Version

Always consider the following points when sending Journey Analytics custom milestones from Maestro, Composer or Journey Manager.

Priority	Product	Best practice
Essential	Maestro Composer Journey Manager	Naming conventions: • Do not use the standard milestone names. • Do not use double pipes (||) in the milestone name. • Do not use the same milestone name for different purposes or intent. • Do not use the milestone name if it is already part of an Exchange component included in the application. • Make sure the milestone name reflects the event it represents and captures the intent of sending that milestone.
	Maestro Composer	Do not use a programming variable in the milestone name parameter when sending it via the Maestro API.
	Journey Manager	Do not use a programming variable in the **addMilestone** method of **TxnUpdater**.
Recommended	Maestro Composer Journey Manager	Identify the right place to send the milestone - discuss whether it should be sent from a Maestro, Composer or Open UX application or Journey Manager. If it should be sent from a Maestro, Composer or Open UX application, decide where in the application it should be sent from.
	Maestro Composer	Identify the right time/condition to send the milestone - discuss on what trigger or condition the milestone should be sent.
	Maestro	Check whether an Exchange component added in the application already sends the milestone you are planning to implement.

Standard Milestones

Journey Analytics | Analytics User | 5.1 & Higher

The following is a list of standard milestones used by Journey Analytics. **Do not** use these names as custom milestone names.

Milestone	Description
Opened	Transaction is created by the user, but no other activity or interaction has been recorded as yet.
Resumed	Transaction is resumed after the user previously saved it.
Started	Transaction is started by some activity or interaction with the application, such as entering data in a field or clicking in a checkbox.
Saved	Transaction is saved by the user.
Submitted	A completed transaction is submitted by the user to Journey Manager.
Completed	A completed transaction is submitted by the user to Journey Manager.
AbandonedBounced	Transaction is abandoned in Journey Manager by the user leaving the application, without interacting with it.
AbandonedStarted	Transaction is abandoned in Journey Manager by the user leaving the application, after starting it.
AbandonedCancelled	Transaction is abandoned in Journey Manager by the user leaving the application, by canceling it.
AbandonedIneligible	Transaction is abandoned in Journey Manager by the user leaving the application, as it is deemed ineligible by, for example, a groovy script.
AbandonedSaved	Transaction is abandoned in Journey Manager by the user leaving the application, after saving, but never returning to it.
AbandonedSubmitted	Transaction is abandoned in Journey Manager by the user submitting the application, but it was not completed due to a post submission delivery service not completing.

Send Custom Milestones from Maestro Applications

Journey Analytics | Analytics User | 5.1 & Higher

Milestones are significant events that occur in a transaction. There are two types of milestones in Journey Analytics:

- Standard milestones that are generated automatically as part of the Journey Analytics business logic, such as Started, Abandoned, Saved or Submitted, and are used to populate the Journey Analytics analytics views.
- Custom milestones, which can be used to record significant events in the user journey, based on the customer's application or business requirements.

Custom milestones can be used for several purposes based on the needs of the business and/or the application. Custom milestones allow customers to build Analytics reports that answer specific questions to enable data-driven decisions that improve the onboarding experience and conversion. It is important to note that once a milestone is sent, it will forever be recorded against this transaction in Journey Analytics and cannot be revoked.

To send a custom milestone from a Maestro application, use the following Maestro Milestone API:

`Insights.milestone("Custom milestone name");`

Presently, there are two ways Journey Analytics uses custom milestone data:

1. To generate User Journeys.
2. As a global filter type to filter data in all Journey Analytics views.

Custom milestone compatibility

- Maestro - since version 5.1.x.

Examples

User Journey

In the context of User Journeys, custom milestones are markers that represent the path the users take within a transaction. A common example of where a milestone can be used in a Maestro application is when an applicant prefills data using the LinkedIn prefill exchange component. In this example, the moment the applicant clicks Use This Profile, a click rule will initiate, and the milestone will be recorded by Insights. This milestone records that the applicant has used the LinkedIn prefill component to prefill data in the form. Another example could be when Applicants validates their identity using a Green ID or Mitek Tiden ID verification.

Note that some of the Exchange components like LinkedIn prefill, Mitek ID scan etc, come with pre-built custom milestones. However, you may modify the pre-built logic to meet your business requirements.

```
A script to run when the user clicks on this form item

1  Form.items.linkedinSignIn.$populateFields();
2  if(item.$$component.properties.insightsLinkedinPrefill === true) {
3    Insights.milestone("LinkedIn Prefill");
4  }
```

As a Global Filter to Separate Applicant and Review Transactions

Custom milestones are a good way to distinguish between transactions made by applicants and transactions made by reviewers. A common use-case is once an applicant has completed an application, the submitted transaction will be reviewed by a review team which creates a second transaction. In Insights, the events from review transactions will skew all metrics for applicant transactions. For example, for one end-user completed application, Insights will show the completed count as 2. In most cases, you will only want to consider and analyze transactions made by applicants. To address this issue, you can implement custom milestones to identify when a transaction is an "Applicant Transaction" (transactions initiated by applicants) and when a transaction is a "Review Transaction" (transactions initiated by reviewers/someone other than the applicant).

The screenshot below displays sample logic to identify and send applicant and reviewer milestones. For this use case, an appropriate place to send this milestone would be in the form load rule.

```
 1  if (data.prefillApplicationType != "") {
 2    data.applicationType = data.prefillApplicationType;
 3  }
 4  var dobItem = Form.items.dateOfBirth ;
 5  dobItem.$hasValue = function(data){
 6      return Util.children(dobItem).some(function(child) {
 7          return !child.exLayout && !Util.isBlank(data[child.id]);
 8      });
 9  };
10  if (Form.isStep("Application Review")) {
11      Insights.milestone("Review Transaction")
12  } else {
13      Insights.milestone("Applicant Transaction")
14  }
15
```

In the above example, when an application is loaded in the browser, a milestone is sent to Insights. This milestone sent will vary depending on the collaboration job step from where the transaction is created. If the application is at the "Application Review" step, the "Review Transaction" milestone is sent to Insights. If the application loads on any other step, the "Applicant Transaction" milestone is sent to Insights. With these milestones in place, you can now filter the transactions for a specific milestone in Insights and hence see the data for either applicant transactions or review transactions.

Send Custom Milestones from Journey Manager Applications

Journey Analytics | Analytics User | 17.10

Milestones are significant events that occur in a transaction. There are two types of milestones:

- Standard milestones that are generated automatically as part of the Journey Analytics business logic, such as Started, Abandoned, Saved or Submitted, and are used to populate the Journey Analytics analytics views.

- Custom milestones, which can be used to record significant events in the user journey, based on the customer's application or business requirements.

Custom milestones can be used for several purposes based on the needs of the business and/or the Application. They allow customers to build Analytical reports that answer specific questions to enable data-driven decisions that improve the onboarding experience and conversion. It is important to note that once a milestone is sent, it will forever be recorded against this transaction in Journey Analytics and cannot be revoked.

You can send custom milestones from a Groovy or Fluent service running on Journey Manager by updating the transaction's submission object by using **TxnUpdater.addmilestone()** API as shown below.

```
import com.avoka.tm.svc.*
import com.avoka.tm.vo.*
import com.avoka.tm.query.*
Txn txn = new TxnQuery()
    .setTrackingCode("[transaction tracking code]")
    .firstValue()
    .addMilestone("Sample Milestone")
    .update()
new TxnUpdater(txn)
```

Presently, there are two ways Insights uses custom milestone data.

1. To represent backend processing milestones in the User Journeys.

2. As a global filter type to filter data in all Journey Analytics views.

Custom milestone compatibility

- Journey Manager - since 17.10.

Examples

User Journey

In the context of User Journeys, custom milestones are markers that represent the path the users take within the transaction. These custom milestones are captured from either a Maestro or Composer application or from Journey Manager. Custom milestones from Journey Manager could be sent while a user is completing the application, or after the user submits the application.

Credit Check example

As part of checking the credit background of an Applicant, a "Credit Check Done" milestone could be sent soon after the credit check is completed on Journey Manager.

```
new TxnUpdater(txn)
.addMilestone("Credit Check Done")
.update()
```

Approval Rate analytics example

If you want to understand the Approval and Rejection rate of submitted applications, you could send "Approved", "Declined" or "Review" milestone based on the decision as part of a Collaboration Job Action.

Approved

```
new TxnUpdater(txn)
.addMilestone("Approved")
.update()
```

Declined

```
new TxnUpdater(txn)
.addMilestone("Declined")
.update()
```

Review

```
new TxnUpdater(txn)
.addMilestone("Review")
.update()
```

As a Global Filter to Separate Applicant and Review transactions

Custom milestones are a good way to distinguish between transactions made by applicants and transactions made by reviewers. A common use-case is once an applicant has completed an application, the submitted transaction will be reviewed by a review team which creates a second transaction. In Insights, the events from review transactions will skew all metrics for applicant transactions. For example, for one end-user completed application, Insights will show the completed count as 2. In most cases, you will only want to consider and analyze transactions made by applicants. To address this issue, you can implement custom milestones on Journey Manager to identify the type of transaction and send a custom milestone to reflect that type.

Applicant Transaction

```
new TxnUpdater(txn)
.addMilestone("Applicant Transaction")
.update()
```

Review Transaction

```
new TxnUpdater(txn)
.addMilestone("Review Transaction")
.update()
```

Depending on which Collaboration Job Step the transaction gets created, you could send either an "Applicant Transaction" (transactions initiated by applicants) or when a transaction is a "Review Transaction" (transactions initiated by reviewers).

- SessionInvalid - When a Session belonging to a Transaction doesn't have user interaction (that transitions the status of the transaction to Started), and if the Transaction status remains in Anonymous Saved status at the end of the session, then upon the creation of a subsequent new Session, Journey Manager will invalidate the previous Session by sending a SessionInvalid milestone. This design makes sure that both Journey Manager and Journey Analytics clamp the transactions to the same date/time and that there are no discrepancies in Transaction Counts between Journey Manager and Journey Analytics.

Send Custom Milestones from Composer Applications

Journey Analytics | Analytics User | v4.4 & Higher

Milestones are significant events that occur in a transaction. There are two types of milestones in Journey Analytics:

- Standard milestones that are generated automatically as part of the Insights business logic, such as Started, Abandoned, Saved or Submitted, and are used to populate the Journey Analytics analytics views.
- Custom milestones, which can be used to record significant events in the user journey, based on the customer's application or business requirements.

Custom milestones can be used for a number of purposes based on the needs of the business and/or the application. It allows customers to build Analytics reports that answer specific questions to enable data-driven decisions that improve the onboarding experience and conversion. It is important to note that once a milestone is sent, it will forever be recorded against this transaction in Insights and cannot be revoked.

Presently, there are two ways Journey Analytics uses custom milestone data.

1. To generate User Journeys.
2. As a global filter type to filter data in all Journey Analytics views.

Custom milestone compatibility

- Composer - since version 4.4.

Send a custom milestone

To send a custom milestone from a Composer application, follow these steps:

1. Add the **Transact Insights datapack** to the organization of the form.
2. Drag and drop the **Insights Rule** onto a component where you would like to implement the logic to send a custom milestone.
3. Click and open the rule. Click on the **Rules** tab and then select the **Insights Rule**.
4. Select **Milestone** in the Insights Event Type dropdown and select **Script Based** from the Insights Rule dropdown.
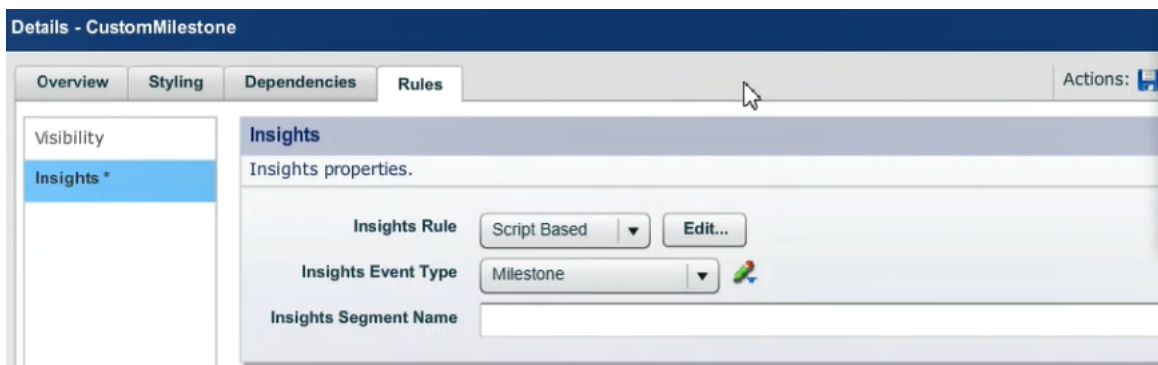
5. Click **Edit** to implement the logic to send Custom milestones in the script based rule. This opens a dialog as shown below.
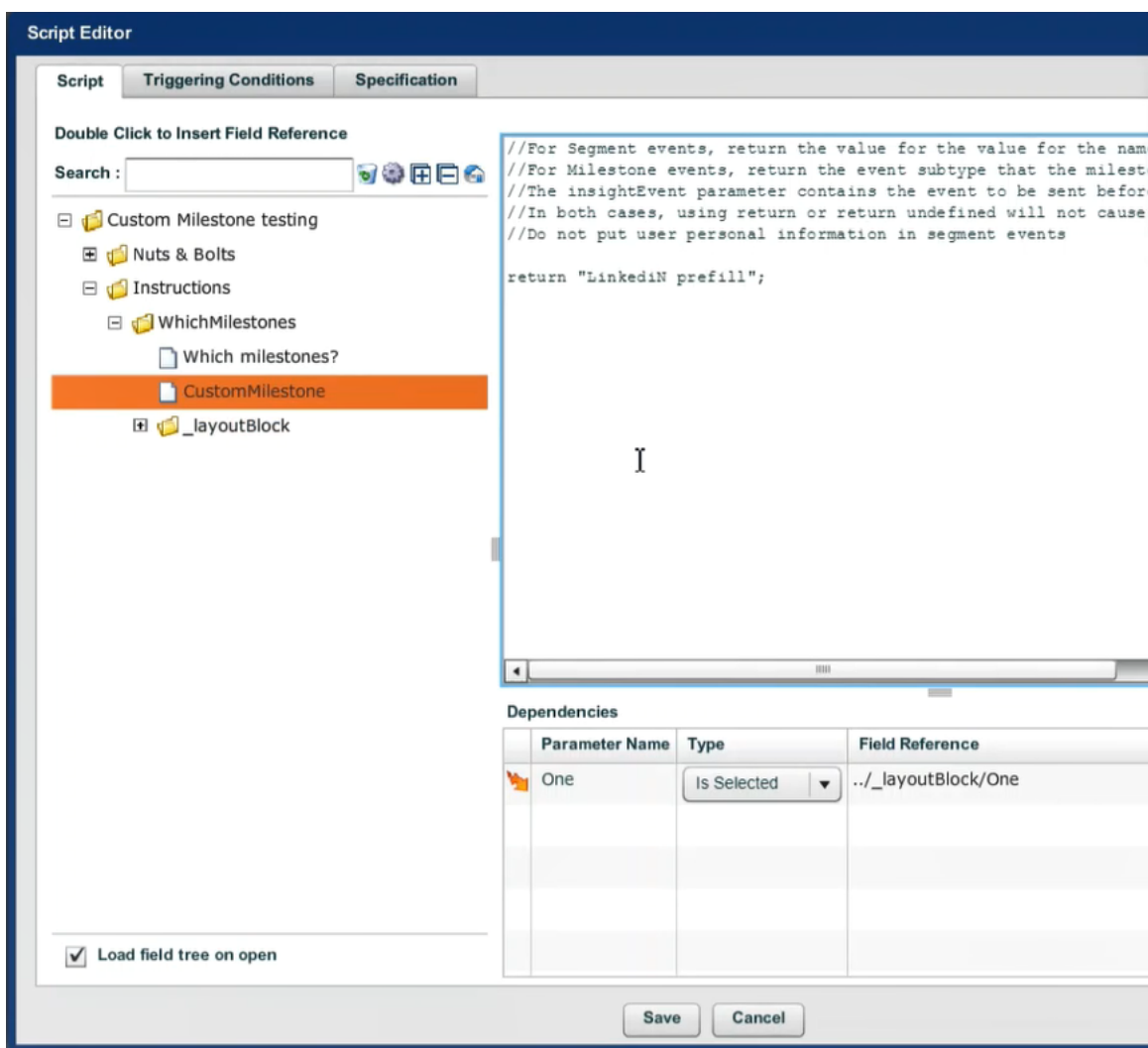
6. Under the Script tab of the dialog, put the logic to send a custom milestone in the code section. To send a milestone, you must return a string value. Whatever string is returned at the end of this script execution, that will be sent as a custom milestone to Insights.

7. Select the **Triggering Conditions** tab and select the appropriate triggering condition to execute this script. For example, if you want to run this as the time of application load, select the **Initialization** checkbox. As another example, if you want to execute this script on a change in parameter used in the script, make sure that parameter is listed under the Parameter Changes field.

8. Save and Close the dialogs.

Examples

User Journey

In the context of User Journeys, custom milestones are markers that represent the path the users take within the transaction. A common example of where a milestone can be used in a Composer application is when an applicant prefills data using the LinkedIn prefill exchange component. In this example, the moment the applicant clicks the Use This Profile button, a Transact Insights milestone rule can be triggered to send the LinkedIn Prefill milestone to Journey Analytics. This milestone records that the applicant has used the LinkedIn prefill component to prefill data in the form. Another example could be when Applicants validates their identity using a Green ID or Mitek Tiden ID verification.

In this example, the script returns something like "Linkedin Prefill" which will be treated as a LinkedIn Prefill Milestone. Also, it is important to make sure that any dynamic variable used in the script are listed under Parameter Changes triggering condition. For instance, the screenshot below displays the triggering conditions tab with "LinkedIn prefill" as a variable which triggers this rule when its value changes.

As a Global filter to Separate Applicant and Review transactions

Custom milestones are a good way to distinguish between transactions made by applicants and transactions made by reviewers. A common use-case is once an applicant has completed an application, the submitted transaction will be reviewed by a review team which creates a second transaction. In Insights, the events from review transactions will skew all metrics for applicant transactions. For example, for one end-user completed application, Insights will show the completed count as 2. In most cases, you will only want to consider and analyze transactions made by applicants. To address this issue, you can implement custom milestones to identify when a transaction is an "Applicant Transaction" (transactions initiated by applicants) and when a transaction is a "Review Transaction" (transactions initiated by reviewers/someone other than the applicant).

The screenshot below displays a sample logic to identify and send applicant and reviewer milestones from a Composer application.
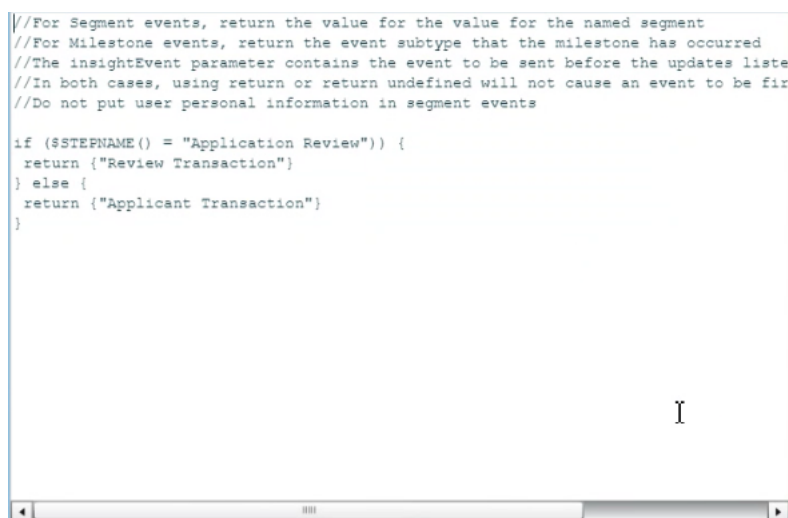
For this use case, an appropriate triggering condition is Trigger rule at initialization as shown below.

Best Practices - Sending Segments

Journey Analytics | Analytics User | Latest Version

Always consider the following points when sending Journey Analytics segments from Maestro, Composer or Journey Manager.

Priority	Product	Best practice
Essential	Maestro Composer Journey Manager	Naming conventions: • Do not use the same segment name for different purposes or intent. • Make sure the segment name reflects the segment of users it represents.
	Maestro	Do not use a programming variable in the segment name parameter when sending it via the **Maestro API**. It is also recommended to avoid using a programming variable in the segment value parameter where possible.
	Composer	Do not use a programming variable when returning a segment value in the script which sends the segment event. It is also recommended to avoid using a programming variable in the segment value parameter where possible.
	Journey Manager	Do not use a programming variable in the segment name parameter of the **addSegment** method of **TxnUpdater**. It is also recommended to avoid using a programming variable in the segment value parameter where possible.
	Maestro Composer Journey Manager	Always add the expected segment names and segment values in the Journey Analytics Segment Whitelist prior to the application going live on Journey Manager.
Recommended	Maestro Composer Journey Manager	Identify the right place to send the segment events - discuss whether it should be sent from a Maestro, Composer or Open UX application or Journey Manager. If it should be sent from a Maestro, Composer or Open UX application, decide where in the application it should be sent from.

| Caution | Maestro Composer | Identify the right time/condition to send the segment event - discuss on what trigger or condition the segment event should be sent. |
| | Maestro Composer Journey Manager | The Segment Whitelist is shared across all Journey Manager environments (DEV, UAT, TEST, STAGING, PROD). Changes to the Segment Whitelist in one environment will be reflected in all environments. |

Send Segments from Maestro Applications

Journey Analytics | Analytics User | 5.1 & Higher

Overview

Segmentation analysis is a powerful tool that helps you to understand the behavior of specific groups of users who share a common trait. It allows you to slice and dice Insights data to provide more granularity and identify usability issues that may impact onboarding performance for specific groups of users. In short, you can identify "what group of users" abandon the application, and "at what stage" of the journey. This capability helps businesses increase ROI by focusing investments on optimizing journeys for specific groups of users.

Segmentation analysis is powered by segment events data sent to Journey Analytics. Segments are custom events that can be sent via Segment APIs from a Maestro, Composer or Open UX application or from a groovy/fluent service on Journey Manager, to Journey Analytics. Each segment event lets Journey Analyticsknow to which segment a transaction belongs to. A transaction can only belong to one segment or group. For instance, transactions can be grouped by gender, age or age brackets, products selected, or Exchange package used to complete an application, such as LinkedIn prefill or Mitek drivers license scan.

It is important to make sure each segment name and value sent as part of the segment event do not contain any PII (data that could identify an individual user, such as an address, telephone number or account number). For more information on PII, see Data Privacy and Security.

As a safeguard against unintentionally sent personally identifiable information (PII), a segment whitelisting mechanism has been introduced to Journey Analytics. No segments are stored in Journey Analytics unless they have been whitelisted under Preferences > Whitelist segments first. For more information on the Segment Whitelist, see Preferences.

To send a segment from a Maestro application use the following Maestro Segment API:

```
Insights.segment("name of segment", "value");
```

Segment compatibility

- Maestro - From 5.1.x.

Example

Below is an example of adding age segmentation using a Change Rule on the year of birth field in the Maestro form. The corresponding Segment Whitelist is also shown as no segmentation data is stored in Journey Analytics unless it has been added to the Segment Whitelist first.
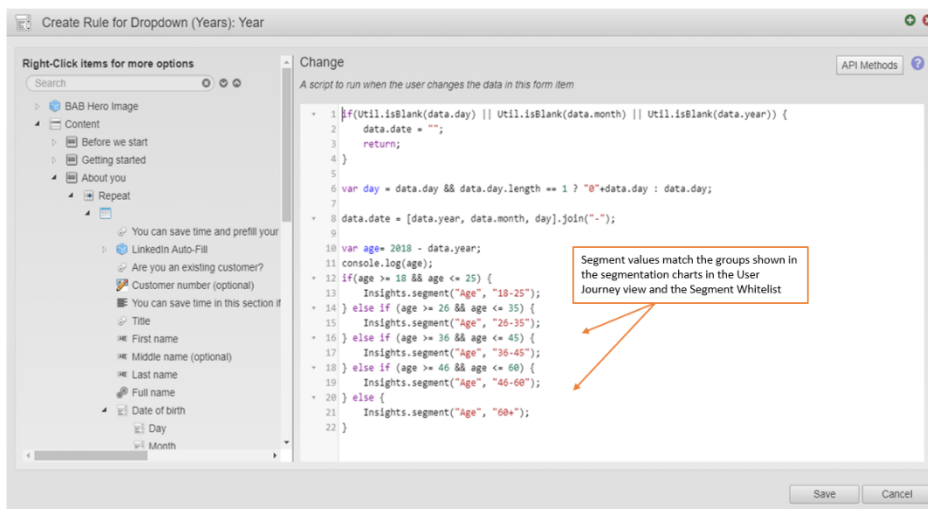
For Journey Analytics to store these segment names and values they need to be added to the Segment Whitelist as shown below.

Preferences   ✖

General   Blacklist filters (user)   Whitelist segments

Segmentation   ⑦   Segment Type   ⑦   Discrete Values   ⑦

Segment names   Age   Discrete   ▾   ✕ 18-25   ✕ 26-35   ✕ 36-45   ✕ 46-60   ✕ 60+   ✕ ▾   🗑
match the
segment names
sent from
Maestro,
Composer or
Transact Manager
via API or script   Segmentation   ⑦   Segment Type   ⑦   Discrete Values   ⑦

                           State   Discrete   ▾   ✕ ACT   ✕ NSW   ✕ NT   ✕ QLD   ✕ SA   ✕ TAS   ✕ VIC   ✕ WA   ✕ ▾   🗑

Segment values match the groups
shown in the segmentation charts
in the User Journey view

❶ By saving the segment Whitelist above, you acknowledge that it would NOT allow PII to be stored in Insights   Add Segment   OK

The Segment Whitelist is shared across all Journey Manager environments (DEV, UAT, TEST, STAGING, PROD).
Changes to the Segment Whitelist in one environment will be reflected in all environments.

Send Segments from   Maestro Applications   - 148 -

Send Segments from Journey Manager

Journey Analytics | Analytics User | 18.05

Overview

Segmentation analysis is a powerful tool that helps you to understand the behavior of specific groups of users who share a common trait. It allows you to slice and dice Insights data to provide more granularity and identify usability issues that may impact onboarding performance for specific groups of users. In short, you can identify "what group of users" abandon the application, and "at what stage" of the journey. This capability helps businesses increase ROI by focusing investments on optimizing journeys for specific groups of users.

Segmentation analysis is powered by segment events data sent to Insights. Segments are custom events that can be sent via Segment APIs from a Maestro, Composer or Open UX application or from a groovy/fluent service on Journey Manager, to Journey Analytics. Each segment event lets Insights know to which segment a transaction belongs to. A transaction can only belong to one segment or group. For instance, transactions can be grouped by gender, age or age brackets, products selected, or Exchange package used to complete an application, such as LinkedIn prefill or Mitek drivers license scan.

It is important to make sure each segment name and value sent as part of the segment event do not contain any PII (data that could identify an individual user, such as an address, telephone number or account number). For more information on PII, see Data Privacy and Security.

As a safeguard against unintentionally sent personally identifiable information (PII), a segment whitelisting mechanism has been introduced to Journey Analytics. No segments are stored in Journey Analytics unless they have been whitelisted under Preferences > Whitelist segments first. For more information on the Segment Whitelist, see Preferences.

Segment compatibility

- Journey Manager - From 18.05.

Example

Most commonly, Applications may have a review step prior to approval or declination if the Applicant doesn't get automatically Approved or Declined. Typically, a review step will involve a manual review of the Application before making a decision. If you want to study bottlenecks in the backend processing of the application, you can use Segmentation in combination with Milestones.

- Send Approved, Declined or Review milestone when an application moves to one of those states.
- When an application moves to Approved or Declined status, send a Segment event whether the Approval or Declination was Instant or Reviewed.

Approved

```
            TxnUpdater(txn)
            .addMilestone("Approved"
            .update()
            TxnUpdater(txn)
            addSegment("Approval Type", "Instant")
            .update()
                        or
                        .addSegment("Approval Type", "Reviewed")
                        .update()
```

Declined

```
            TxnUpdater(txn)
            .addMilestone("Declined")
            .update()
                    new TxnUpdater(txn);
                    .addSegment("Decline Type", "Instant")
                    .update()
                    or .addSegment("Decline Type", "Reviewed")
```

Review

```
            TxnUpdater(txn)
            .addMilestone("Review")
            .update()
```

For Journey Analytics to store these segment names and values they need to be added to the Segment Whitelist as shown below.

Segment values match the groups shown in the segmentation charts in the User Journey view

Preferences   ✖

General   Blacklist filters (user)   Whitelist segments

Segmentation	⑦	Segment Type	⑦	Discrete Values	⑦	
Approval Type		Discrete ▼		x Instant x Reviewed	× ▾	🗑

Segment names match the segment names sent from Maestro, Composer or Transact Manager via API or script

Segmentation	⑦	Segment Type	⑦	Discrete Values	⑦	
Decline Type		Discrete ▼		x Instant x Reviewed	× ▾	🗑

ⓘ By saving the segment Whitelist above, you acknowledge that it would NOT allow PII to be stored in Insights   Add Segment   OK

The Segment Whitelist is shared across all Journey Manager environments (DEV, UAT, TEST, STAGING, PROD). Changes to the Segment Whitelist in one environment will be reflected in all environments.

Send Segments from Composer Applications

Journey Analytics | Analytics User | v4.4 & Higher

Segmentation analysis is a powerful tool that helps you to understand the behavior of specific groups of users who share a common trait. It allows you to slice and dice Insights data to provide more granularity and identify usability issues that may impact onboarding performance for specific groups of users. In short, you can identify "what group of users" abandon the application, and "at what stage" of the journey. This capability helps businesses increase ROI by focusing investments on optimizing journeys for specific groups of users.

Segmentation analysis is powered by segment events data sent to Journey Analytics. Segments are custom events that can be sent via Segment APIs from a Maestro, Composer or Open UX application or from a groovy/fluent service on Journey Manager, to Journey Analytics. Each segment event lets Journey Analytics know to which segment a transaction belongs to. A transaction can only belong to one segment or group. For instance, transactions can be grouped by gender, age or age brackets, products selected, or Exchange package used to complete an application, such as LinkedIn prefill or Mitek drivers license scan.

It is important to make sure each segment name and value sent as part of the segment event do not contain any PII (data that could identify an individual user, such as an address, telephone number or account number). For more information on PII, see Data Privacy and Security.

As a safeguard against unintentionally sent personally identifiable information (PII), a segment whitelisting mechanism has been introduced to Journey Analytics. No segments are stored in Journey Analytics unless they have been whitelisted under Preferences > Whitelist segments first. For more information on the Segment Whitelist, see Preferences.

Segment compatibility

- Composer - since version 4.4.

Example

To send a segment from a Composer application, follow these steps:

1. Add the **Transact Insights datapack** to the organization of the form.
2. Drag and drop the **Insights Rule** onto a component where you would like to implement the logic to send a segment.
3. Click and open the rule. Click on the **Rules** tab and select the **Insights Rule**.
4. Select **Script Based** from the Insights Rule dropdown menu.
5. Select **Segment** from the Insights Event Type dropdown menu.
6. Enter the segment name in the Insights Segment Name field.
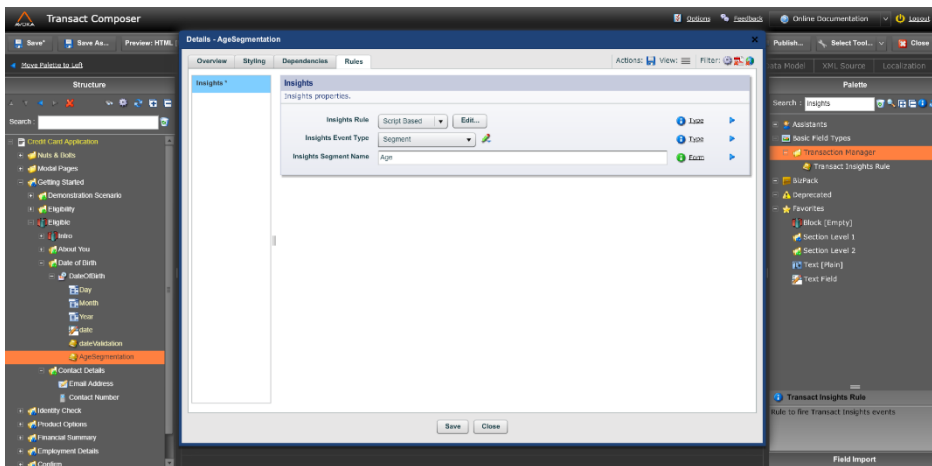
7. Click **Edit** to implement the logic to send a segment in the script-based rule. This opens a dialog as shown below.
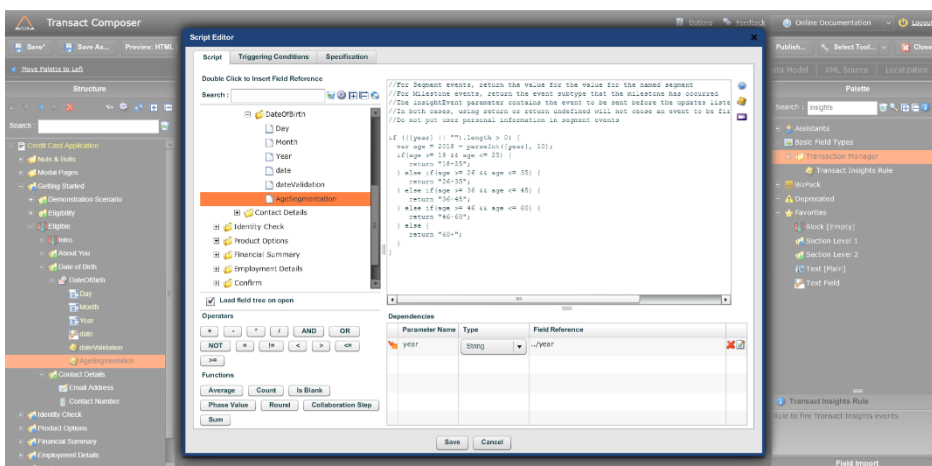
8. Under the Script tab of the dialog, put the logic to send a segment in the code section. To send a segment, you have to return a string value. Whatever string is returned at the end of this script execution, that will be sent as a segment to Journey Analytics.

9. Then select the **Triggering Conditions** tab and select the appropriate triggering condition to execute this script. For example, if you want to run this as the time of application load, select the **Initialization** checkbox. As another example, if you want to execute this script on a change in parameter used in the script, make sure that parameter is listed under the Parameter Changes field.
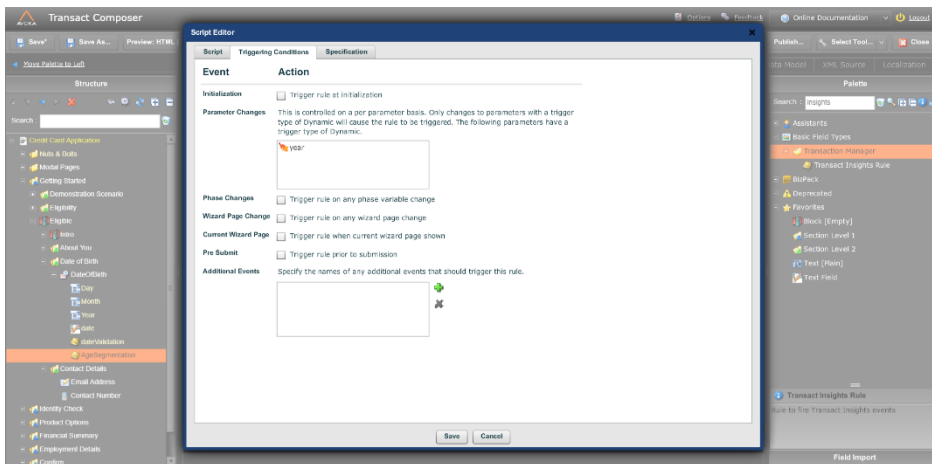
10. After everything is set up, Save and Close the dialogs.

11. For Journey Analytics to store these segment names and values they need to be added to the Segment Whitelist as shown below.


The Segment Whitelist is shared across all Journey Manager environments (DEV, UAT, TEST, STAGING, PROD). Changes to the Segment Whitelist in one environment will be reflected in all environments.

Milestones vs Segments

Journey Analytics | Analytics User | Latest Version

Overview

Journey Analytics collects two custom event types – Milestones and Segments. These events can be sent from either an application built from Maestro or Composer, or from Journey Manager. These custom events can be leveraged to capture analytics data to cater to a specific application, business or market requirements, that cannot otherwise be achieved with out-of-the-box analytics data that Journey Analytics presents. The diagram below presents the key differences in the concepts of Milestones and Segments.
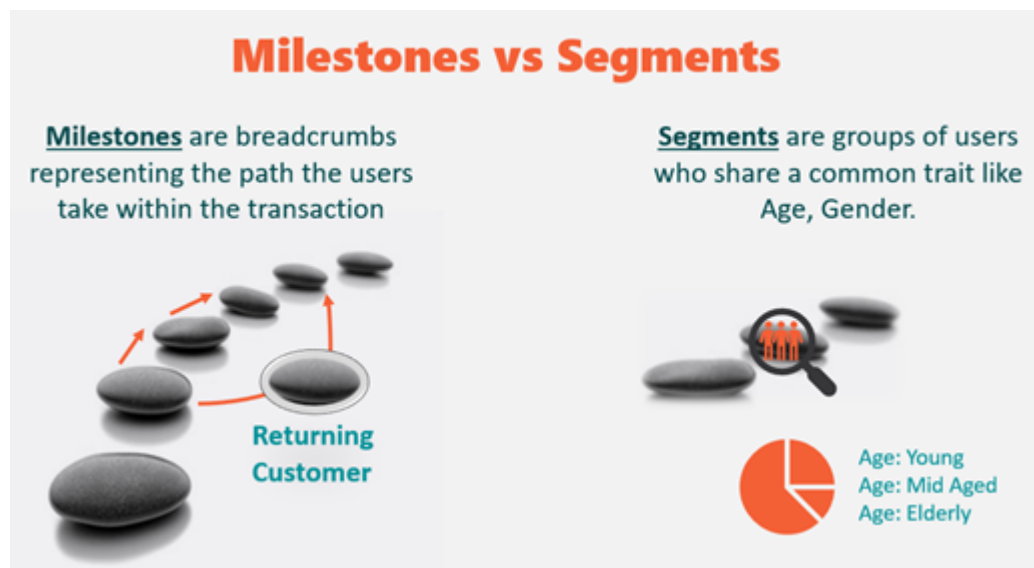
In the context of User Journeys, milestones help you understand:

- How users engage with different parts of the application.
- How long it takes for users to reach each milestone and its implication on the effort it takes to progress through different parts of the user journey.
- The impact of an Exchange component on completion rates.

Segments, on the other hand, help you understand:

- Completion rate of different groups of users.
- Usage of Exchange components by different groups of users.
- Time to reach a milestone for different groups of users.
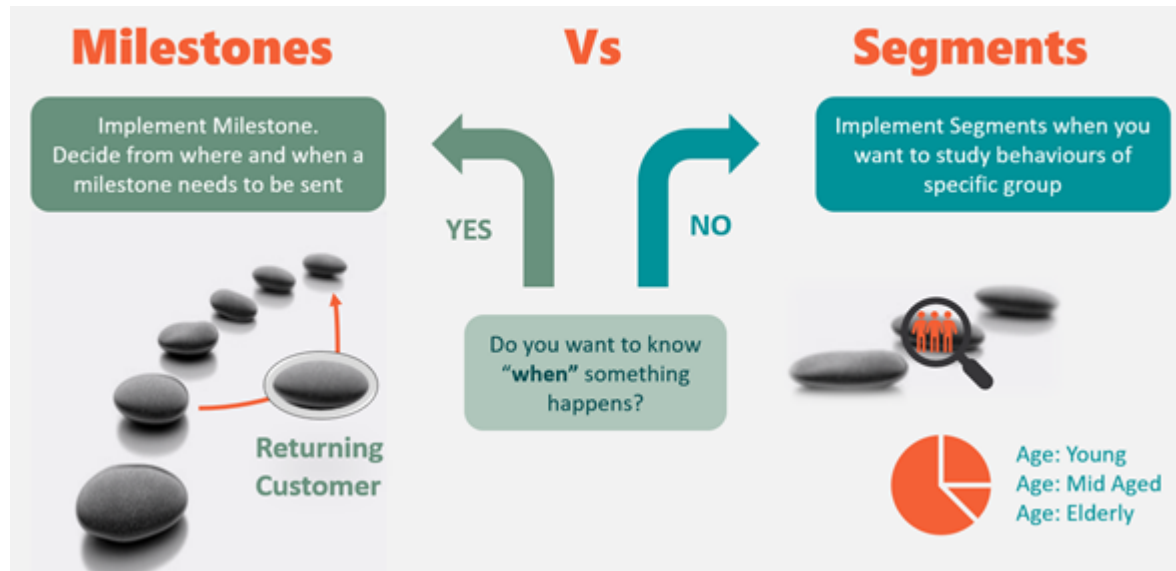- User journey patterns for specific groups of users.

Milestones vs Segments Video

Watch the video below to see the difference between milestones and segments, with examples.

When to Use What?

It is important to pick the right custom event to get the desired outcome. The diagram below provides a good way to decide between milestones and segments.

Milestones are useful when you want to know when, or if, a significant event happens, such as if a ID validation package is used in an application. If however, you simply want to differentiate between different groups of users, then segments are the way to go, such as age bracket, gender, and other demographics.

As milestones are essentially breadcrumbs, they cannot be revoked once they have been sent to Insights. Therefore, it is important not to implement milestones, for example, to track age or gender or other things based on user's input. If the user changes their option, there will be multiple milestones sent for each selection, which distorts the data collected in Insights.

Note also that segment events that are implemented in a Maestro, Composer or Open UX application or on Journey Manager need to be added to the Segment Whitelist in Journey Analytics. For more information on the Segment Whitelist, see Preferences. This additional step is intended to act as a deterrent for personally identifiable information (PII) data from being stored in the Journey Analytics database.

In most cases, either milestone or segment events get the desired result in terms of answering specific questions from the business, however, it may sometimes be necessary to implement both. The decision to implement either, or both, depends on what insights you want to get from the User Journey View and analytics report.

User Administration

Journey Analytics | Analytics User | Latest Version

This information is intended for Journey Manager Administrators who have permission to edit Spaces, Organizations, and Roles for other Journey Manager user accounts.

Journey Analytics User Roles

Two user roles are available for Journey Analytics.

User Role	Definition
Transact Insights User	User accounts with this role have access to all analytics features and functionality of Journey Analytics.
Transact Insights Administrator	User accounts with this role have access to all analytics features and functionality of Journey Analytics. They also have access to the administrative capabilities that globally affect all users; the ability to add, edit and delete Global Filters.

Assigning Journey Analytics User Roles

To grant access to Journey Analytics, assign one of the Journey Analytics user roles to an existing Journey Manager user account.

For more information on adding the Journey Analytics user roles, see assigning roles to a User Account. If the user is a new Journey Manager user, see creating a User Account.

> Use Journey Manager to reset your Journey Analytics password.

Organization and Space

To grant access to Journey Analytics, you also need to assign the **Transact Insights** space to the user's account in Journey Manager.

Without access to this space, login to the Insights Web Application will be unsuccessful.

The Journey Analytics user can then access all forms in the Organization(s) they have access to in Journey Manager.

Access Journey Analytics

Journey Analytics can be accessed in two ways:

- Via the Journey Manager Web Server https://<ManagerServerName>/Insights
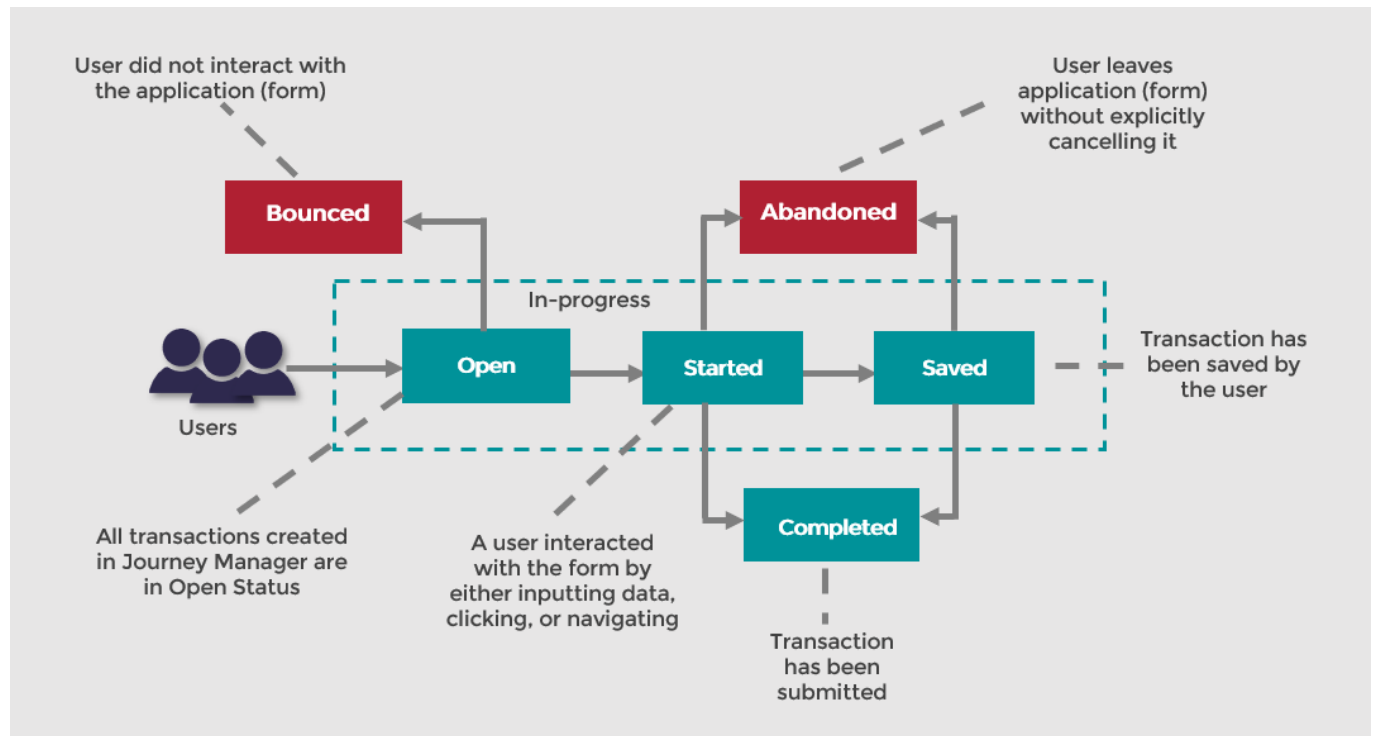
- From the Journey Manager menu bar.

Transaction Status Flow

Journey Analytics | Analytics User | Latest Version

The diagram below illustrates the statuses that a transaction can achieve in Journey Analytics.

Transactions on Journey Manager may progress through any of the following statuses; Open, Bounced, Started, Abandoned, Saved and Completed.

Status	Definition
Open Trans-actions	All transactions created by Journey Manager are considered to be in Open status. From this status, a transaction can either proceed to Started or Bounced status.
Bounced Transactions	Any transaction where the applicant (user) did not interact with the application (form). Navigation across the form or scrolling the page does not count as an interaction. A legitimate interaction is one where a user inputs data into the form in some way - text input, radio button input, clicking on a checkbox, clicking the Save button, attaching a file etc. It typically takes 24-48 hours for a transaction in Open status to transition to Bounced status. This time will vary based on the settings configured in Journey Manager.
Started Transactions	Any transaction where a user interacted with the application (form) by inputting some data. A started transaction is a progressive step towards completion. Started trans-actions and Bounced transactions are mutually exclusive. For instance, a started trans-action can never become a bounced transaction or vice versa.

Saved Transactions	Any transaction that has explicitly been Saved by the user. When a user resumes a Saved transaction, it can move to Completed status if the user submits the form. Or it can move to Abandoned status if the user abandons the application (form).
In-Progress Transactions	Any transaction that is: • Open Status • Started Status • Saved Status
Completed Transactions	Any transaction that has been submitted to Journey Manager.
Abandoned Transactions	Any transaction that has been deemed as Abandoned in Journey Manager. When a user leaves the application without explicitly canceling it, the transaction lives in Started status for a period defined in Journey Manager, after which it is considered as an Abandoned transaction.

Data Privacy and Security

Journey Analytics | Analytics User | Latest Version

Journey Analytics Architecture

To support detailed statistical analysis of user behavior with applications, Journey Analytics collects events from two sources – Journey Manager and the browser where the application is rendered. Journey Manager sends transaction status events and applications rendered in the browser send user interaction events. The user interaction events include information such as - field visit, field completion, validation error, section navigation etc.

These analytical events are directly comparable to the Google Analytics or Adobe Analytics events recorded by these analytics services. These events DO NOT include any user input data itself and therefore Journey Analytics DOES NOT collect any **Personally Identifiable Data**[1] (PII). The Journey Analytics service has been explicitly designed to NOT record or store user input data and PII. You may verify this by using the browser's F12 tool to monitor the network traffic of an Journey Analytics enabled application.

The figure below describes the high-level architecture of how Journey Analytics fits into the Journey Platform.
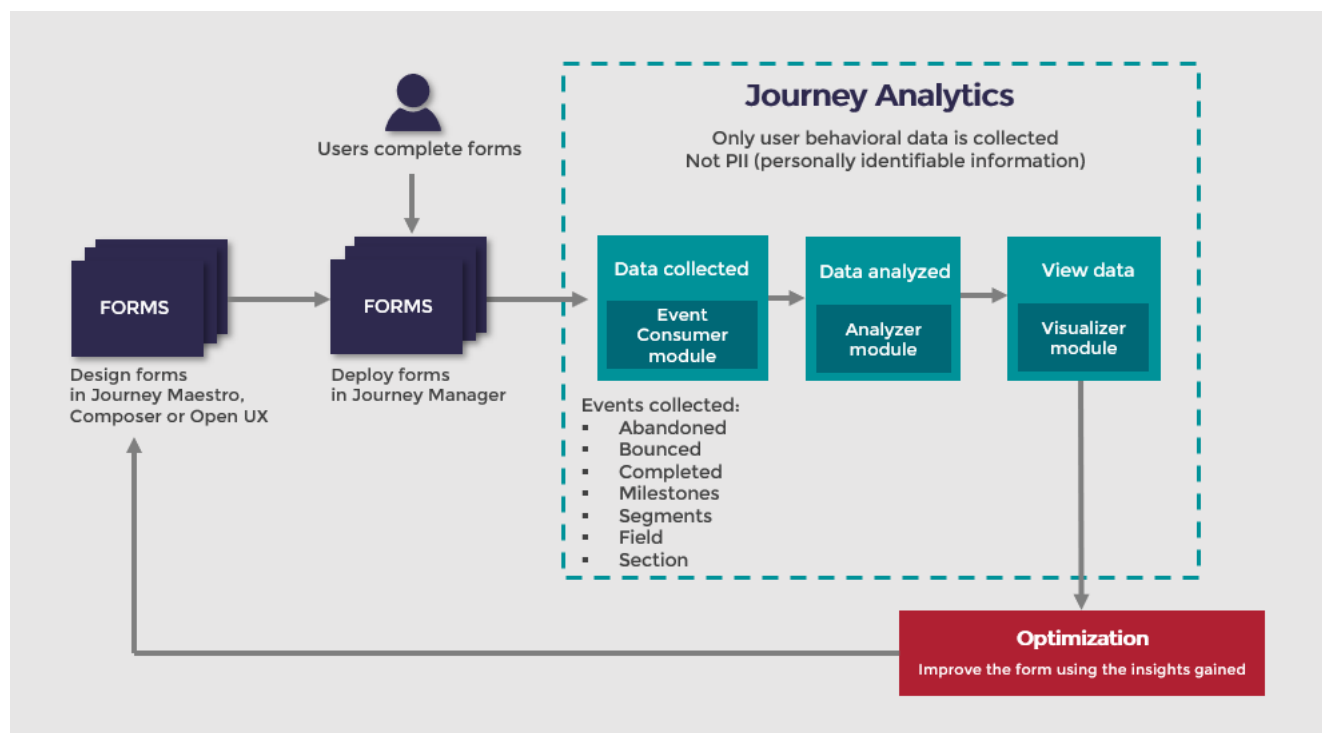
Journey Analytics is built and hosted on the Google Cloud Platform (GCP) infrastructure. It is a fully managed service built using the GCP.

---

[1]Personally identifiable information (PII) is any data that could potentially identify a specific individual. Any information that can be used to distinguish one person from another and can be used for de-anonymizing anonymous data can be considered PII.

Data in Transit

Journey Analytics code runs on GCP's App-Engine servers. This includes both the code that processes events coming from an application and Journey Manager and the code that delivers analytics views on Journey Analytics. All communication between an application (rendered on the browser), Journey Manager and Journey Analytics occur over secured network protocols (using Transport Layer Security). Journey Analytics does not support non-secure communication protocols.

Authorization of incoming Events

When a user opens an application (that has Journey Analytics enabled), Journey Manager embeds a JWT (JSON Web Token) in the header of the network response. The JWT is signed by Journey Manager with a secret key only known to Journey Manager and the Journey Analytics backend. The application further embeds this JWT in all interaction events sent to Journey Analytics. The JWT contains the required information for the Journey Analytics backend to; first, Authenticate and Authorise the interaction events (behavioral data) from the applications; second, map the events to the corresponding customer's GCP project and the associated BigQuery dataset.

Data at Rest

Each customer's data is isolated and stored in a separate GCP project, and each Journey Manager Instance that has Journey Analytics provisioned is allocated a dedicated Dataset on BigQuery within the customer's GCP project. GCP BigQuery is the same massively paralleled query service that powers Google Analytics. Refer to https://cloud.-google.com/resource-manager/ to understand how GCP projects are managed. We adhere to best practices advised by GCP documentation. When at rest, all events data is encrypted using AES-256 encryption and stored securely in BigQuery. Google encrypts all data by default with Google-managed keys. It is possible for us to manage the encryption keys ourselves, but we don't currently do this. Please refer to the following links for more details:

https://cloud.google.com/security/encryption-at-rest/
https://cloud.google.com/security/encryption-at-rest/default-encryption

Authentication and Authorization to access Journey Analytics Analytics UI

Customer's business teams can access their Journey Analytics analytics data through their Journey Manager server deployed on the Cloud or on-premise.

A customer's business user must have an appropriate Journey Manager's user account with Journey Analytics roles to access Journey Analytics analytics data. Access to Journey Analytics is managed by Journey Manager's security protocols. All access controls are also managed by Journey Manager, such as access to Organizations, Spaces, and Applications.

After a user is authenticated and authorized by Journey Manager, Journey Analytics' Data Visualizer provides access to Analytics data for only those Orgs and Applications for which the user has access to, on Journey Manager.

Journey Analytics also supports Journey Manager's multi-tenancy architecture. This means that separate business units (Orgs) can manage their own applications separately and control access to their own Journey Analytics analytics data.

The Journey Manager's security architecture supports 2FA user authentication and temporary role assignments. After Journey Manager authenticates the user, it redirects all Journey Analytics analytics through iFrames. Communication between the user's browser and the Journey Analytics data visualizer happens via Journey Manager using HTTPS protocol (i.e. with TLS) which delivers all Journey Analytics analytics data securely.

Strict No PII policy

As described in the above section, Journey Analytics employs all possible mechanisms and strategies to NOT store data relating to PII.

Personal data is effectively anything related to an individual that can be used or combined to identify that person. Examples include Names, addresses, phone numbers, credit card, bank and other account numbers, IP and email addresses, license plate numbers, VAT codes, passports, driver's licenses, national identification numbers, biometric identifiers.

Journey Analytics collects three types of events:

Transact Status events

These events include an ID to uniquely identify a transaction in Journey Analytics so that all interaction events can be linked to that transaction. Journey Analytics receives Transaction status events primarily from Journey Manager. However, Started and Submitted transact status events are received from an application rendered in the users' browser.

Standard user Interaction events (Behavioural data)

These events include a wide variety of user interaction data arising from user engagement with the application. A detailed list of these events is provided in the Data stored in Journey Analytics section below. In short, it only includes information pertaining to user interaction and guaranteed to exclude PII.

Custom events

There are two types of custom events customers can send from either an application (designed in Maestro, Composer or Open UX) or from Journey Manager.

Event	Description
Custom Milestones	These are custom events that customers can implement to capture key events specific to their business, context of the application and the application workflow. These can be implemented in an application using APIs provided in Maestro or a business rule in Composer. These events can also be sent from a service running on Journey Manager.

These events only include the name of the Milestone itself and nothing more. The Customer's implementation team must make sure that no PII is sent in the API's Milestone name parameter. It is strongly recommended to not use programming variables in the API parameter. Instead, the best practice is to explicitly hardcode the name of the custom Milestone in the API parameter at implementation time and use conditional logic where needed.

These are events that assist customers to capture user Segments to analyze transactional data specific to a set of transactions having similar characteristics. Like custom milestones, these can be sent from an application (designed in Maestro, Composer or Open UX) or from a service running on Journey Manager. These events include a Segmentation Name and a Segmentation Value.

Segment
events

The Customer's implementation team must make sure that no PII is sent in the API's Segmentation Name and Segmentation Value parameters. It is strongly recommended to not use programming variables in the segment API parameters. Instead, the best practice is to explicitly hardcode Segmentation Name and Segmentation Value in the API parameter at implementation time and use conditional logic where needed.

As an added PII deterrence measure, for Segment events, a Segment Whitelist feature has been implemented in Insights. Customers have to explicitly whitelist all Segment Names and Values that should be allowed by the Journey Analytics backend to be stored in the Journey Analytics database. If the Journey Analytics backend receives a Segment Name or Value that is not listed in the Segment Whitelist, the Segment event will NOT be stored in the Journey Analytics database.

Network Rules

To support Journey Analytics, Journey Manager servers deployed on-premises must have firewall rules which support outbound access to the following Google Cloud Platform endpoints:

- https://eventconsumer-dot-transact-insights.appspot.com
- https://dataprovider-dot-transact-insights.appspot.com
- https://apiserver-dot-transact-insights.appspot.com
- https://dashboard-dot-transact-insights.appspot.com
- https://accounts.google.com

In addition, for all internal users who need access to Journey Analytics UI, their machine should be able to make outbound calls to the following URLs:

- The on-premises Journey Manager URL.
- https://dashboard-dot-transact-insights.appspot.com

In addition, for all internal users who test applications (rendering forms in the browser to generate transactional data), their machine should be able to make outbound calls to the following URLs:

- https://eventconsumer-dot-transact-insights.appspot.com
- https://accounts.google.com

All traffic is REST JSON service calls over HTTPS, typically message payloads are very small measuring a few KB at most.

Data Stored in Journey Analytics

Journey Analytics stores the following data:

Transaction and Session data

- Manager information.

- Transaction ID.

- Form Organization information.

- Form Space information.

- Form and version information.

- Browser session information (Time when the session was established, user_agent, device location, device info, time-zone).

Milestone events: Opened, Started, Bounced, Abandoned, Saved, Completed (Submitted)

- Transaction identification.

- Timestamp of the event.

Section name and sequence ID for Saved and Abandoned milestones

- Section (page/dialog) events: Section navigation, Section completion.

- Transaction identification.

- Timestamp of the event.

- Section name.

Field events: Field navigation, Field completion, Field validation

- Transaction identification.

- Timestamp of the event.

- Section name.

- Field name.

- Field sequence.

- Field path, for example **ContactDetails/PrimaryContact/AddressLine1**.

- Key Strokes (Count of key-ups in the field. Sent as part of field completion event).

- Data Length (Length of data in the field. Sent as part of field completion event).

- Time in field (Time spent in the field. Sent as part of field completion event).

Custom Milestone events: These could be sent through milestone APIs from a Maestro form, by adding an Insights business rule in a Composer form, or from a service running on Manager using TxnUpdater API.

- Transaction identification.

- Timestamp of the event.

- Milestone name.

Segment events: These could be sent through segment APIs from a Maestro form, by adding an Insights business rule in a Composer form, or from a service running on Manager using TxnUpdater API.

- Transaction identification.

- Timestamp of the event.

- Segmentation name.

- Segmentation value.

Known Issues and Workarounds

Journey Analytics | Analytics User | Latest Version

This topic identifies the known issues in Journey Analytics and identifies several workarounds that can be used to address these issues.

Journey Analytics data collection issue with Journey Manager

Version 5.1.8 or earlier

Issue	When the submission object in Journey Manager is created using SubmissionTaskService::createAnonymousSavedForm, insightsFlag submission property is never set.
Impact	The impact of this is that Journey Manager will never send FormRequest for these submissions to Journey Analytics. This is important as the Journey Analytics backend uses FormRequest data to identify the appropriate BigQuery dataset where the event data is to be stored. Without FormRequest data from Journey Manager, Journey Analytics discards all events for the corresponding submission.
Fix Availability	This issue has been fixed and available in Journey Manager 5.1.9 or any subsequent releases.
Workaround	The workaround is to set the insightsFlag property of the submission object to true in the script where you are creating the saved transaction. You need to make sure the changes are committed to Journey Manager. submission.setInsightsFlag(true)

Collaboration Jobs created via Journey SDK

Issue	Journey Manager doesn't properly indicate 'insightsEnabled' status for Collaboration Jobs defined by Journey SDK.
Impact	Despite indicating that 'insightsEnabled' is set to 'true', no events are actually captured for the job's transactions.
Fix Availability	This issue has yet to be fixed and affects any Collaboration Job created via Journey SDK.
Workaround	To workaround this issue, ensure that any service-def.json for affected Collaboration Jobs, includes the "insightsEnabled" parameter as noted in the example below:

```json
{
  "name": "Deposits Onboarding",
  "description": "Lorem ipsum",
  "type": "Job Controller",
  "tmMinVersion": "5.0.0",
  "legacyGroovy": false,
  "parameters": [
    {
      "name": "jobDefinition",
      "type": "JSON",
      "filePath": "job-definition.json",
      "bind": true,
      "required": true,
      "clearOnExport": false,
      "readOnly": false
    },
    {
      "name": "insightsEnabled",
      "value": true,
      "type": "Boolean",
      "bind": false,
      "required": false,
      "clearOnExport": false,
      "readOnly": false
    }
  ]
}
```

Journey Analytics FAQs

Journey Analytics | Analytics User | Latest Version

FAQs	Answer
Are the Journey Analytics screens and the Journey Manager Analytics screens the same?	The screens in Journey Manager were each written for an individual purpose. They have different data sources and queries. These screens will never match the Journey Analytics data screens for that reason.
Can you confirm the Journey Analytics data only shows fields that have been interacted with?	This is correct. Journey Analytics is a behavioral analytics tool and is only aware of fields if it receives at least one event for a field. This includes navigation, validation or completion, such as clicking in a field, auto population of a field or one or more keystrokes to complete the field. It is not possible with the current architecture of the application to know anything about fields that are never actually touched by a user.
In the Dropoff view, what is the difference between the Conversion Rate and the Completion Rate?	Conversion Rates are calculated based on all incoming traffic to the form, which includes robots, search indexers and other non-user activity. Completion Rates, however, are calculated based on only the transactions where users actually interacted with fields on the form, or Started the application.
In the Dropoff view, why do stats differ between Transaction Metrics and Section Completion?	Stats may differ between Transaction Metrics (form transaction-level stats) and Section Completion (form section-level stats) when users install browser addons which can block analytics events being captured for sections.
Is rounding used?	Rounding is used only to display larger numbers in a readable manner. Rounded numbers can be identified by the k (thousand), m (million) or b (billion) abbreviation. However, calculations use the actual raw counts, not the rounded figures. These can be found anywhere throughout the application where large numbers are presented.
Why do the Journey Analytics Dashboard Duration statistics display as a median value, whereas Field Errors and Field Help are displayed as an average?	Because Duration can have such a wide variation in values, we throw out the very high and very low values, to display the median. However the Field Errors and Field Help are often a much tighter bunch of values, so it makes sense to display them as an average. The range of numbers of errors is typically smaller compared to the time taken to complete a transaction.

How long does it take for data to flow into Journey Analytics?	It usually takes around 90 minutes from the time the user interacts with the application. However, when a new form is introduced, please allow up to 24 hours for the new form to be available in Journey Analytics dashboards due additional processing requirements.
How long before a transaction is considered abandoned?	Typically it takes 24 hours, and is configurable in Manager.
How long is historical data available for viewing?	Currently Journey Analytics data is warehoused indefinitely.
How can I access the old Dashboard UI if I am on v18.11 of Journey Analytics?	Use https://<Journey Analytics environment>/insights/secure/dashboard
Why do the same segments appear in our DEV and UAT environments?	The Segment Whitelist is shared across all Journey Manager environments (DEV, UAT, TEST, STAGING, PROD). Changes to the Segment Whitelist in one environment will be reflected in all environments.
Why are transactions from the last 24hrs not included in the preset periods?	The preset periods do not contain the last 24 hours. Simply use the custom period with an end date of today.
Why after logging into Journey Analytics are the views all blank?	Log out, clear your browser cache and log back into Journey Analytics.