

Form Analytics

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Overview

Form Analytics allows users (with permission enabled) to gain deeper insight into their forms with the availability of metrics such as conversion and abandonment rates, and other factors that affect form performance.

Requirements

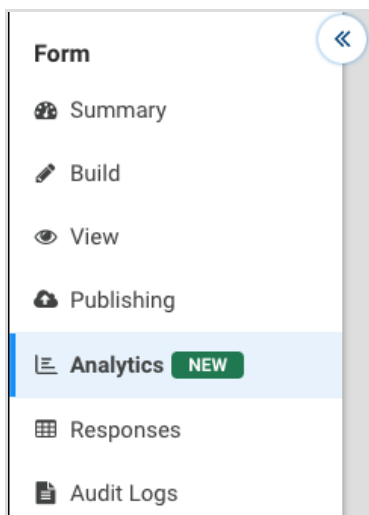
- Team plan or above
 - Audit Permission Package (minimum 1) with Analytics permission enabled
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Getting Started

Permissions Setup

1. Open the **Admin Dashboard**
2. Under "User Management", select **All Users**
3. Locate the user profile that should receive access to form analytics
4. **Edit** the user profile
5. Open the **Permissions** tab
6. View the permissions under the **Audit** permission package
7. Expand the section for **Audit Permissions**, if not already expanded
8. Select the checkbox for "**Workflow Analytics**" (or "**Access Analytics**", depending on your FormAssembly plan)
9. Click **Save**

Accessing Analytics



- Open the Forms List
- Locate the form you want to be analyzed
- Click Configure
- Click Analytics

Metrics

The analytic metrics available are the following:

- Conversion rate
- Abandonment rate
- Bounce rate
- Drop-off Rate
- Top fields with the highest bottleneck count
- Top fields with the highest error count

These metrics can be viewed over a certain time period, with the following view options available in the dropdown menu at the top of the dashboard:

- Last 7 Days
- Last 30 Days (default)
- Last 3 Months
- Last 6 Months
- Last 12 Months

Please review the table below for more information about each metric and what this data can do for you.

Note: The value for Form Views is the total number of times all respondents opened the form in a browser.

| Metric | Description | Value |
|--------|-------------|-------|
|--------|-------------|-------|

| Metric | Description | Value |
|----------------------------------|---------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Form Conversion Rate Over Time | Number of submitted forms / Number of form views | Insight into how many respondents are viewing the form compared to the number of people who are submitting a response to the form. |
| Form Abandonment Rate Over Time | Number of forms not submitted (including Bounce and Drop-off) / Number of form views | Insight into how many respondents are viewing a form and not submitting the form. |
| Bounce Rate Over Time | Number of forms not submitted when there is NO interaction / Number of form views | Insight into how many respondents are viewing forms and not interacting with them at all – and immediately leaving without focusing on a field or entering keystrokes. |
| Drop-off Rate Over Time | Number of forms not submitted when there IS interaction / Number of form views | <p>Insight into how many respondents are viewing forms and interacting with them, but not submitting.</p> <p>Note: Form responses that are saved are counted as drop-offs until they are resumed and submitted.</p> |
| Top Bottleneck Fields Date Range | Top 5 fields that show where respondents drop-off over a specified date range | <p>Insight into the most common areas (fields) where respondents are hitting a “bottle-neck” and leave (drop-off) the form before submitting. Changes to the form can be made to the bottle-neck fields.</p> <p>Note:</p> <ul style="list-style-type: none"> • This metric is reflected as raw data of the top 5 fields with the most occurrences. • Only text fields, checkboxes, radio buttons, and select fields (multi-select and dropdown fields) are tracked for bottleneck fields. |

| Metric | Description | Value |
|--------------------------------|------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Top Error Fields Date Range | Top 5 fields that most commonly result in a validation error upon submission attempt over a specified date range | <p>Insight into the most common areas (fields) where respondents encounter validation errors upon attempting to submit the form. Changes to the form can be made to the error-prone fields.</p> <div> <p>Note:</p> <ul style="list-style-type: none"> This metric is reflected as raw data of the top 5 fields with the most occurrences. </div> |

Additional Notes

- Server-side submission failures (issues with submissions after respondents click the submit button) may still be counted in the total number of submissions.
- Saved form responses are counted as drop-offs until they are resumed and submitted.
- Top error and bottleneck fields are reflected as raw data of the top 5 fields with the most occurrences.
- For bottleneck fields, the last field the user had interaction with or focused on is tracked. Keep in mind that it is possible that **the field in the form right after the bottleneck field may be the one that caused the respondent to drop off.**
- At this time, only text fields, checkboxes, radio buttons, and select fields (multi-select and dropdown fields) are tracked for bottleneck fields.
 - Fields added dynamically, such as repeatable fields added after the form loads, will not be tracked (regardless of field type).
 - File uploads and password fields are not tracked.