



LiveEngage Report Builder

Overview

Version 1.3

August 2018

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Introduction

Report Builder enables brands to analyze their operational and business LiveEngage powered contact centers and consumer facing channels. This includes a ready made comprehensive set of continuously evolving predefined dashboards, which brands can access through their LiveEngage account.

With a Customer Success Offering, Report Builder enables brands to request custom reports based on the data available in LiveEngage. Brands can receive custom dashboards presenting brand-specific KPIs and groupings of KPIs presented in custom visualizations. For further information on the Customer Success Offering, including the certification process and other prerequisites, contact your LivePerson account team.

Key Features of Report Builder

Report Builder includes the following key features:

- Access a selection of out of the box predefined dashboards built using your LiveEngage account data
- Analyze agent performance, efficiency, productivity, and utilization at an hourly level
- Calculate necessary staffing for each shift using metrics aggregated by Skill, showing supply and demand at peak times and during business-as-usual
- Get insight into the performance of a campaign, including metrics such as conversions, increase in AOV, missed opportunity, and sales generated
- Combine data for all of your contact center operational channels including Live Chat, Web Messaging, Mobile Messaging, Facebook, and more
- Keep your finger on the pulse of agent and campaign performance by regularly receiving a Report Builder snapshot directly to your email


Getting Started with Report Builder

Detailed below are instructions for using Report Builder.

Accessing Report Builder

Brands can access Report Builder through the LiveEngage UI, from the Messaging Real-time Dashboard, Queue Health Dashboard, and Campaign Dashboard.

To access Report Builder:

1. Log into LiveEngage using your Campaign Manager or Agent Manager credentials.
2. Open the dashboard by clicking the drag down icon (▼).
3. Click the Report Builder icon () on the left of the screen. A new tab is opened.
4. Click **Shared Reports**. Two folders are displayed:
 - **LE predefined dashboards**: All available predefined LiveEngage dashboards.
 - **My Account**: Reports that have been designed specifically for your account.

- **Analytics RB Reporting:** Customized dashboards created by LP for brands with a Customer Success Offering package.
5. Click on a folder to view the available reports inside.

Data view restrictions

Report Builder filters data by agent groups, meaning that agent group managers can see data from their own group(s) and subgroups only.

Where there are data that cannot be pre-filtered by agent group, there are also restrictions by role:

- Agent managers are not allowed to view data in the Business Activity Dashboard that cannot be filtered by agent groups.
 - If a copy of the Business Activity Dashboard is saved under the 'My Account' folder, an agent manager trying to access it will receive an error message and will not be able to see any data.
- No restrictions apply for campaign managers.
 - Agent managers required to view business data available on the Business Activity Dashboard will need to be assigned the role of Campaign Manager as well.

Report Builder Folders

Dashboards in Report Builder are saved in folders. The available folders are as follows:

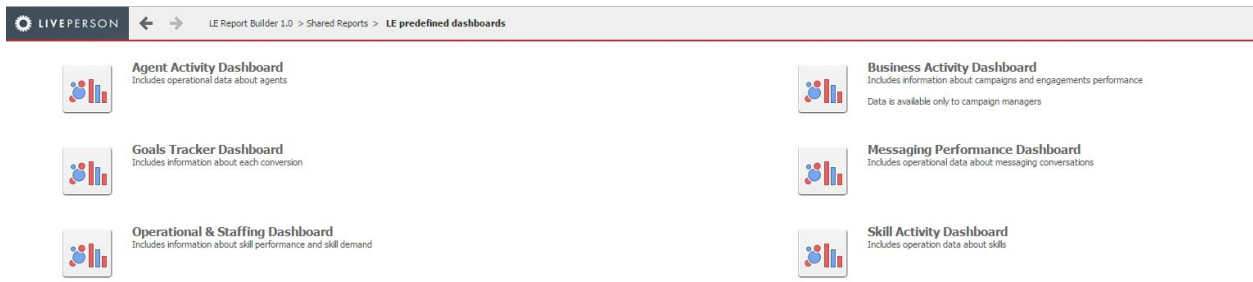
- **Shared Reports** - dashboards saved here are visible to all the users in the account.
 - **LE predefined dashboards:** All available predefined LiveEngage dashboards. See details below.
 - **My Account:** Reports that have been designed specifically for your account, created by you, other users in the account or by the LP account team.
 - **Analytics RB Reporting:** Customized dashboards created by LP for brands with a Customer Success Offering package. All users eligible for receiving these customized reports will have view access to the folder and its dashboards.
- **My Reports** - dashboards saved here are visible only to the user who created the dashboard.

LiveEngage predefined dashboards

The data currently available in LE predefined dashboards is as follows:

- **Agent Activity Dashboard:** Includes operational data about agents.
- **Skill Activity Dashboard:** Includes operational data about skills.
- **Goals Tracker Dashboard:** Includes information about each conversion.
- **Messaging Performance Dashboard:** Includes operational and business data about messaging conversations.

- **Business Activity Dashboard:** Includes information about campaigns and engagements performance. Business Activity Grids are also available in Excel export formats, in daily and monthly level aggregations.
- **Operational & Staffing Dashboard:** Includes information about skill performance and skill demand
- **Survey Activity Dashboard:** Includes information about responses to surveys in Live chat



Note: The data included in Report Builder are constantly evolving.

For further information on predefined dashboards, refer to the [Predefined dashboards overview](#).

Field details tab

Each report in Report Builder includes a Field Details tab, containing a list of all the available KPIs in the report, and a description for each.

Viewing reports

Each report in Report Builder includes Dashboard view(s) and Field Details. You can change between views by using the tabs at the bottom of the screen.

To run a report:

1. Click on the dashboard you wish to open.

Time-frame selector

When selecting a dashboard to run you will be asked to select a timeframe for the dashboard data. This prompt is the “time frame selector”. The dashboard will only present data from the pre-loaded timeframe. You can always “re-prompt” from within the dashboard’s file menu.

In the selector, you may choose from one of the following time-frame options:

1. Last 120 days
2. Last 60 days (default)
3. Last 30 days
4. Filter for Months - choose up to four individual months from the past 13 months

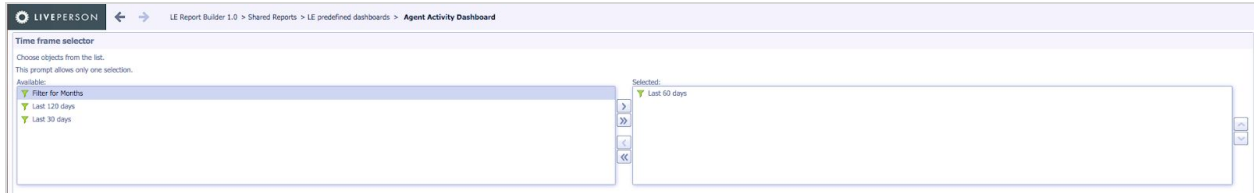


Image: Time frame selector main prompt

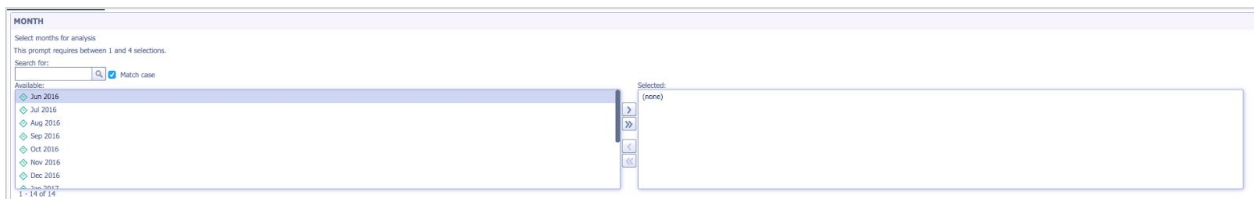


Image: Time frame selector “Filter for Months” prompt

Hour offset selector

When running the **Agent Activity Dashboard**, **Messaging Performance**, **Skill Activity** or the **Goal Tracker Dashboard**, another prompt will be shown - “hour offset selector”. This prompt presents a selection of time offsets from the default timezone of the account. Using this allows you to present the data in the dashboard in your local time zone (in case it is different from the account's).

If you do not require any change in view from the account default time zone setting, you won't need to choose anything in the pop-up prompt before running the dashboard (the default offset is TZ+0 which is a zero hour offset from the account default setting).

2. Hour offset selector

To display data with an offset from the account's default time zone, choose the desired hour offset from the list below.

This prompt allows only one selection.

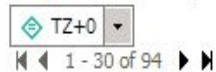
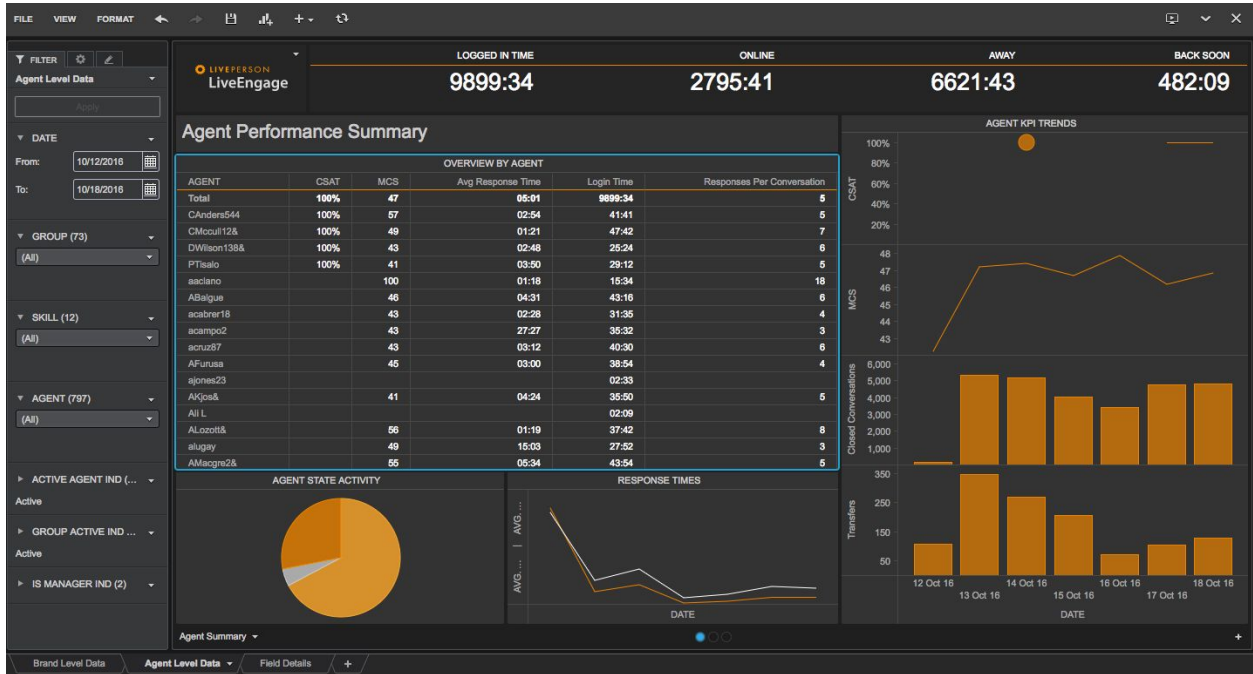


Image: Hour offset selector

Dashboard view

Data is displayed in a graphical format and/or in grid view. The data is presented to all users according to their LiveEngage account-level time zone, even if their user-level time zone has been configured differently.



Hover over any report with your mouse to view an explanation of what the report displays. You can customize how the data is displayed by choosing your own color scheme.

Field Details

A description is provided for each KPI in the report.

Column Name	Description
ACTION ID	The specific action ID (service ID / order ID / lead ID).
ACTION TYPE	The specific action type (service ID / order ID / lead ID).
AGENT	The name of the agent.
AGENT REPORTING OUTCOME	The name of the agent who reported the Conversation Outcome; if this field is empty, then a customer reported the given outcome.
CAMPAIGN GOAL?	Was the goal/conversion related to the campaign?
CAMPAIGN NAME	The campaign name which was displayed to the visitor.
VALUE	The goal's monetary value. Applicable only to monetary goals.
VISIT ID (ENG)	Visit ID of the engagement.
VISIT ID (GOAL)	Visit ID of the goal reached or the conversion.
VISIT SOURCE	The original source from which customers arrived at a given website.
VISIT START TIME (ENG)	Start time of the engagement visit.
VISIT START TIME (GOAL)	The start time of the visit, where either a goal, or a conversion, was reached.

Figure 2: Agent Tracker Goal report (Field Details)

Filtering reports

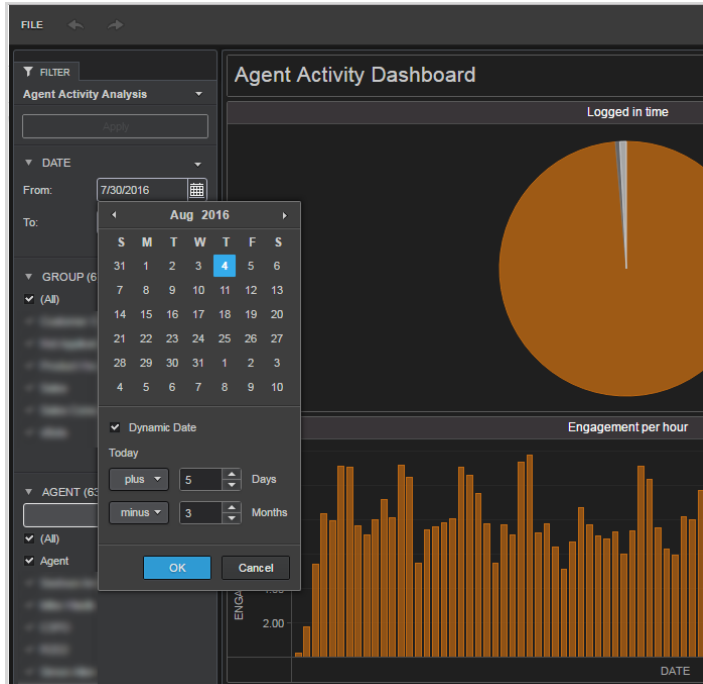
Each report can be filtered to ensure that only the most relevant data is displayed. Reports can be filtered according to specific criteria. These criteria include some or all of the following parameters: Date, Agent group, Agent, Skill and so on.

To filter a report:

1. Select a report either from the LE predefined dashboards or from the reports in My Account. For the example below, the Agent Activity Dashboard is used.
2. On the left of the screen, select the dates for which you would like to display data.

Note:

- Data will only display for dates chosen within the timeframe selected when you first ran the report (see [Viewing reports](#)).
- *You can select specific dates using the calendar option, or you can select Dynamic Date to select a timeframe relative to today's date.*



3. Click **OK**.
4. Under each parameter, for example Agent, use the checkmarks to select the data you would like to be displayed.
5. At the top left of the screen, click **Apply**. The data will now be displayed according to your preferences.

The screenshot shows the 'Agent Level Data' table. The table has three columns: 'DATE', 'GROUP', and 'AGENT'. The data rows show activity on 22 Oct 16 for the 'vBots' group, with agents 'BB8 vBo' and 'R2D2 vE'.

DATE	GROUP	AGENT
22 Oct 16	vBots	BB8 vBo
22 Oct 16	vBots	BB8 vBo
22 Oct 16	vBots	R2D2 vE
22 Oct 16	vBots	R2D2 vE

Exporting reports

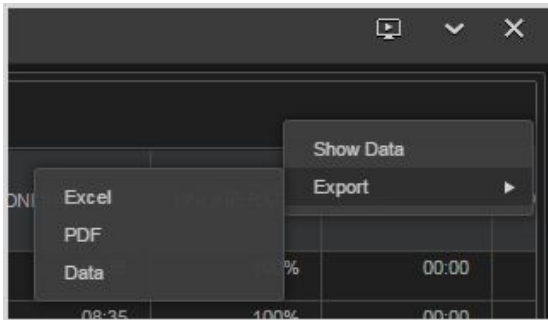
Exports can be exported in PDF or Excel format.

To export a report:

1. Hover your mouse cursor over the top right corner of your screen until an arrow is displayed.



2. Click the arrow, and then select **Export**. The following options are displayed: **Excel, PDF, Data**.



3. Select an export option.

Note: By default:

- *Excel will be used when the view is grid.*
- *PDF will be used when the view is widgets.*
- *Data is exported to a CSV file.*

FAQ

1. Can I create my own reports?

Should you wish to create and customize your own reports, please contact your LivePerson account team.

2. What reporting data is available?

The data currently available in LE predefined dashboards is detailed below. Data in My Account is dependent on your individual account settings.

- **Agent Activity Dashboard:** Includes operational data about agents.
- **Skill Activity Dashboard:** Includes operational data about skills.
- **Goals Tracker Dashboard:** Includes information about each conversion.
- **Messaging Performance Dashboard:** Includes operational and business data about messaging conversations.
- **Business Activity Dashboard:** Includes information about campaigns and engagements performance.
- **Operational & Staffing dashboard:** Includes information about skill performance and skill demand.

- Survey Activity Dashboard: Includes information about responses to surveys presented in Live Chat

Further information on each dashboard can be found in the [Predefined Dashboards Overview](#).

3. How long is data stored for in Report Builder?

Data is stored for 13 months for both chat and messaging. Within each report, data can be displayed for any four month period from over the previous 13 months.

4. How frequently is the data updated in Report Builder?

Reports are refreshed throughout the day, every eight hours. The first data update takes place every morning, between 07:00 to 08:00 in the farm's timezone*. After each update, the reports display the data collected up to 6 hours earlier.

*Every LiveEngage account sits on one of our three farms. Your account's farm is indicated in the account URL, for example: <https://z1.le.liveperson.net/a/19935036/#wa!webagent>. The three farms, and their timezones, are as follows:

- Z1 = Virginia, North America. The timezone for the Virginia farm is EST.
- Z2 = UK. The timezone for the UK farm is GMT (or GMT+1 during Daylight Saving Time).
- Z3 = Sydney, Australia. The timezone for the Sydney farm is AEST.

Please note: Any event which takes place in our service (such as, messaging conversations opened, chat survey submitted etc.), arrives into Report Builder data sources with a delay caused by the processing and calculation times.

5. How can I change the data's timezone in Report Builder?

The data is shown according to LiveEngage's account-level time zone configuration. When changing the account-level timezone, the change will take place in Report Builder when data is next refreshed. In addition, in the Agent Activity Dashboard and the Goal Tracker Dashboard, users are able to change the time in which the data is presented by selecting a time offset. This allows the users to analyze performance in their local time.

6. How is Report Builder data stored?

Report Builder data is all stored internally - on the same LivePerson servers as the rest of LiveEngage, in the same LivePerson data centers. The same security measures applied to all other LP products and servers also apply to Report Builder, including encryption.

Further Reading

[Report Builder Connection Area Article](#)
[Predefined Dashboards Overview](#)

[Predefined Dashboards Glossary](#)
[Report Builder FAQs](#)

LivePerson Technical Support

LivePerson Technical Support is available 24/7 in the Connection Area.

Please note that LivePerson Support troubleshoots and resolves issues in Predefined Dashboards officially released by LivePerson as part of the Product. Issues with dashboards residing in the “My Account” or “My Reports” folder should be directed to your Customer Success Manager.

[Click here](#) to read the Support Policy.