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Reporting Guide

Genesys Web Engagement 8.5.1

12/30/2021

Table of Contents

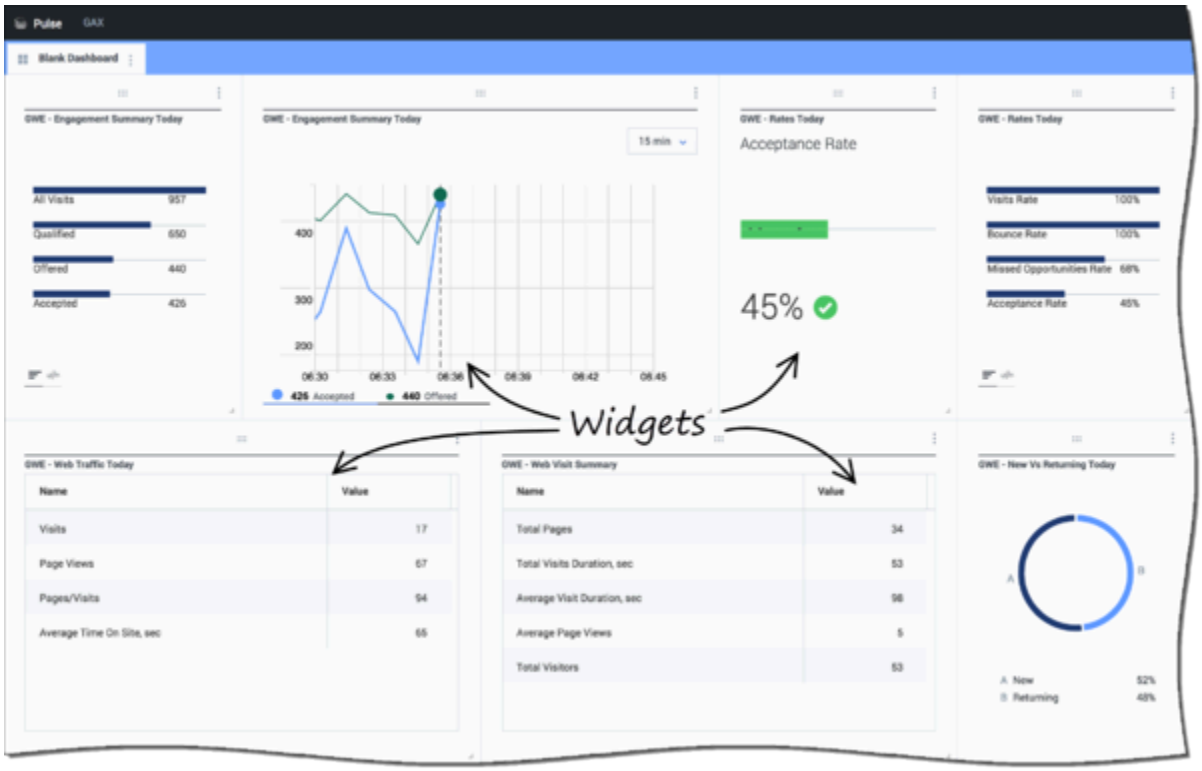
Genesys Web Engagement Reporting Guide **3**
- Basic Views 9
  - GWE - Engagement Summary Today Basic View 10
  - GWE - Web Traffic Today Basic View 12
  - GWE - Visit Metrics 13
  - GWE - Authenticated Visitors Today 16
  - GWE - New vs. Returning Today 17
  - GWE - Rates Today 18
- Extended Views 20
  - Engagement Summary Today Extended View 33
  - Web Traffic Today Extended View 38

CCPulse Reporting **47**
- CCPulse Standard Reporting Templates 49

Genesys Web Engagement Reporting Guide

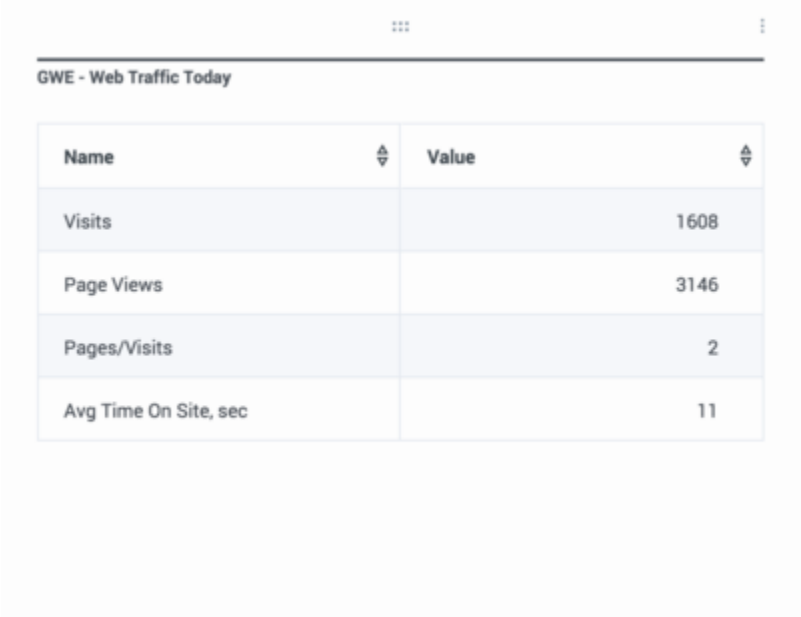
Web Engagement tracks your customers' events and behaviors. Using Pulse, the Genesys reporting solution, you can set up a dashboard, as shown below, that helps you see the patterns in these events. (You can also still use CCPulse+.)

This dashboard contains widgets, which display a lot of useful information:

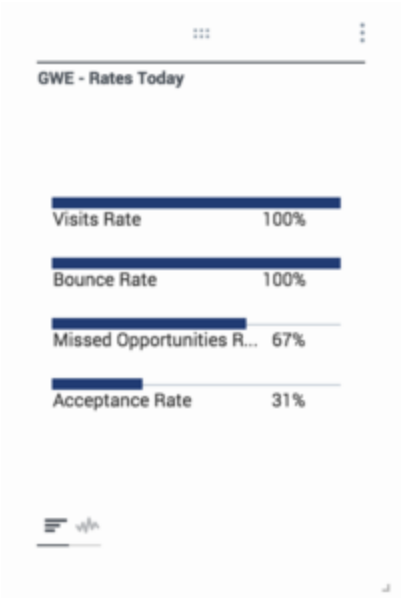


For example, you can see a summary of the day's engagements:

Or your daily traffic:

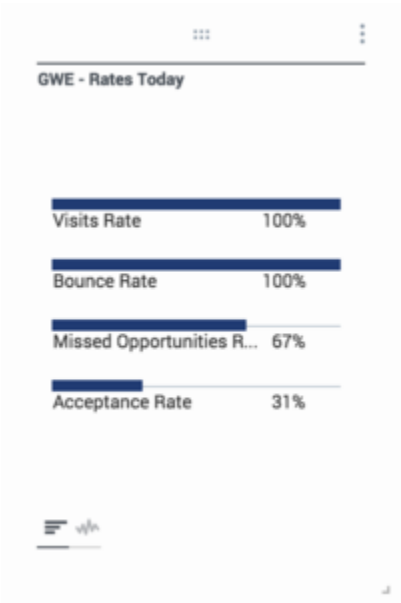


You can keep tabs on your bounce rate and acceptance rate, while staying in touch with how often you have missed engagement opportunities:

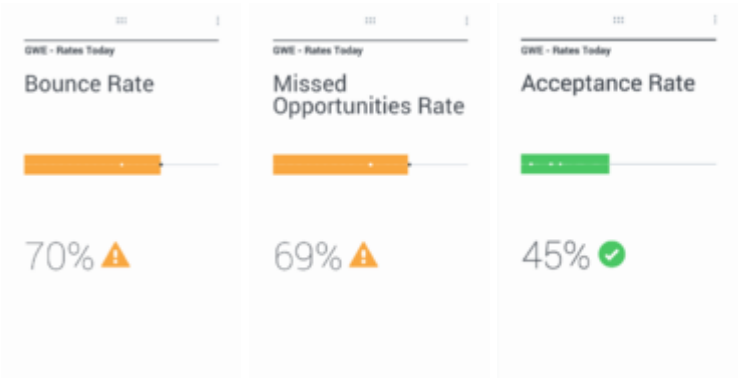


Selecting Your Data

You can choose which values to display. For example, you might want to see a few different values as a list:

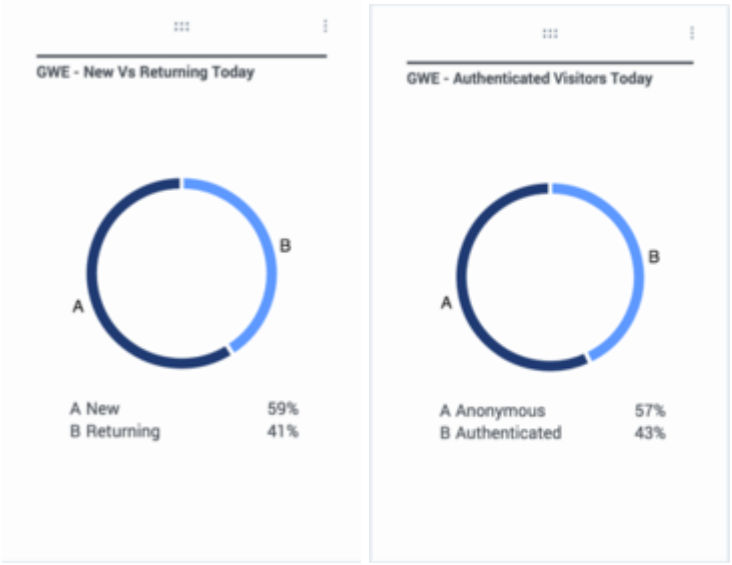


Or you might want to view one or more of them separately:

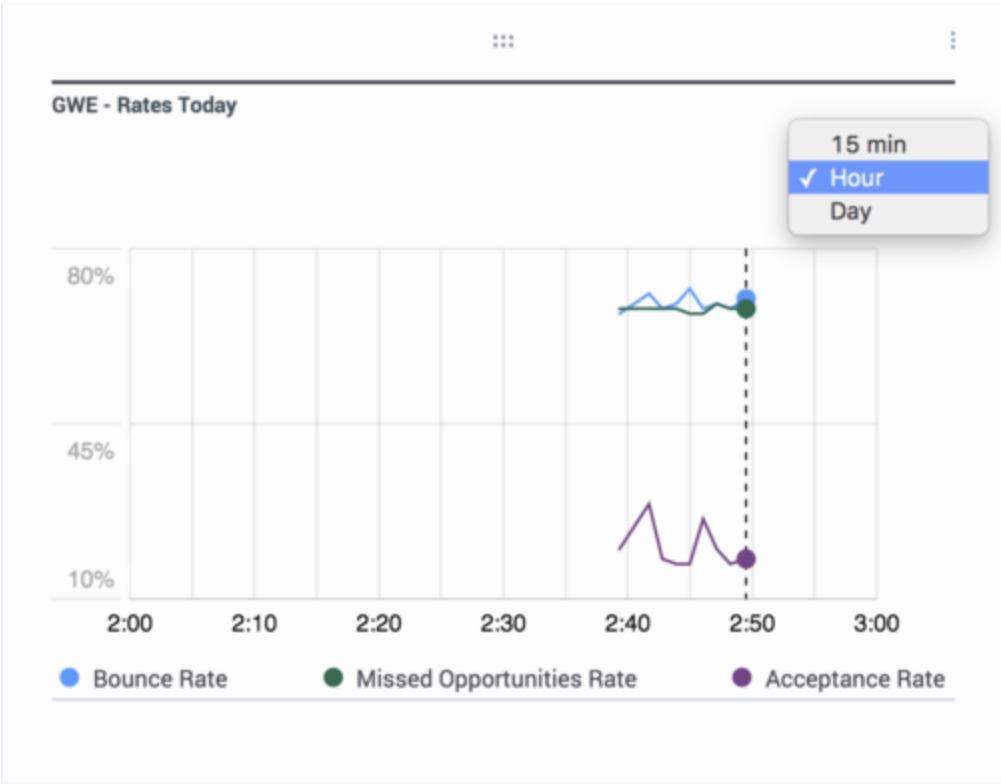


Choosing Your Format

While some values call for a list or a bar chart, others might work best with a donut:



And some types of information work well as trend lines:


GWE - Rates Today
15 min
Hour
Day
80%
45%
10%
2:00
2:10
2:20
2:30
2:40
2:50
3:00
Bounce Rate
Missed Opportunities Rate
Acceptance Rate

GWE - Engagement Summary Today
Hour
550
275
0
3:00
3:10
3:20
3:30
3:40
3:50
4:00
Offered
Accepted

Basic Views and Extended Views

The features described on this page are available to the following Basic View widgets, each of which is described on its own page:

- GWE - Engagement Summary Today Basic View
- GWE - Web Traffic Today Basic View
- GWE - Visit Metrics
- GWE - Authenticated Visitors Today
- GWE - New vs. Returning Today
- GWE - Rates Today

You can also expand the Engagement Summary and Web Traffic Today widgets into Extended View dashboards.

Basic Views

When you open the Pulse dashboard, you can click the white plus sign in the blue tab to select from the following widgets, each of which allows for certain Basic Views:

- GWE - Engagement Summary Today Basic View
- GWE - Web Traffic Today Basic View
- GWE - Visit Metrics
- GWE - Authenticated Visitors Today
- GWE - New vs. Returning Today
- GWE - Rates Today

GWE - Engagement Summary Today Basic View

Genesys recommends that you use the List Widget to display the Engagement Summary Today information.

All Visits displays the total number of visits today—that is, since midnight. **Note:** Each user visit is counted separately. Specifically, if a user leaves the website and returns later, this will be counted as two visits.

Qualified shows the number of visits for which one or more Hot Lead events was sent to the engagement logic strategy during that visit. You must write rules that determine which visitors are qualified. After a visitor has been sent to the strategy, you can also apply further criteria for whether to engage with that visitor. In other words, not all *qualified* visitors will be *engaged*. **Note:** The Qualified amount in the Basic View is based on the number of Qualified visits, each of which may

generate one or more Hot Lead events, as opposed to counting the number of Hot Lead events directly.

Offered is the number of invitations that were sent today. **Note:** Invitations are not necessarily sent to all Qualified visitors.

Accepted is the number of invitations that were accepted.

You can also display similar information in the Extended View.

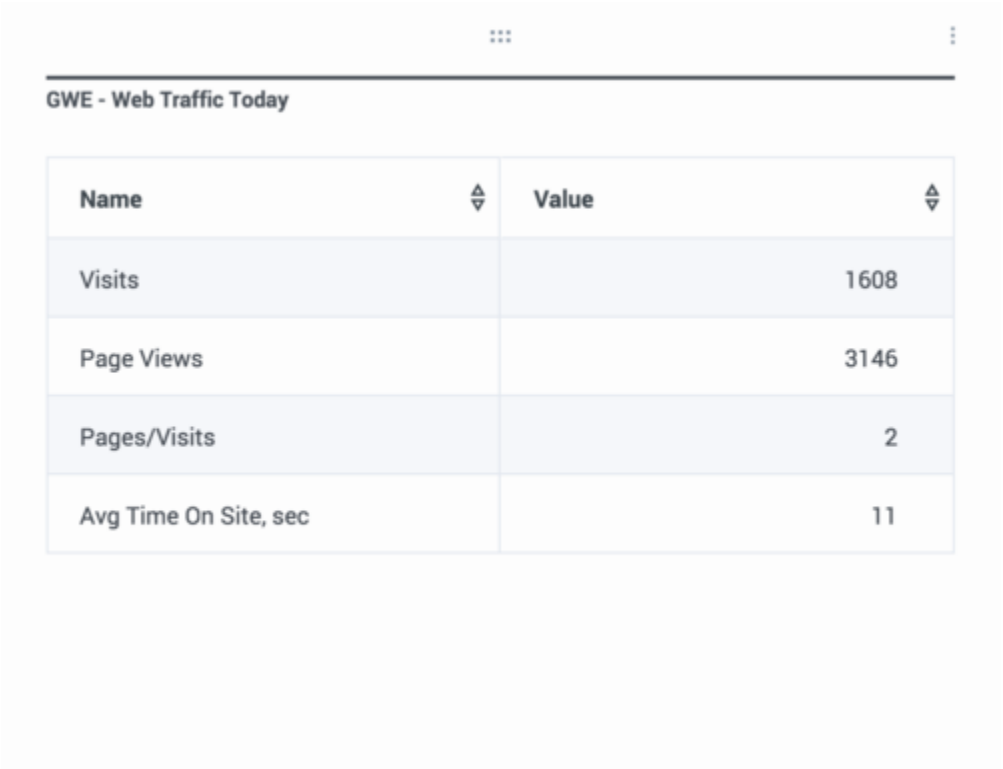
GWE - Web Traffic Today Basic View

Genesys recommends that you use the Grid Widget to display Web Traffic Today information.

This widget contains important information about the your site's traffic since midnight:

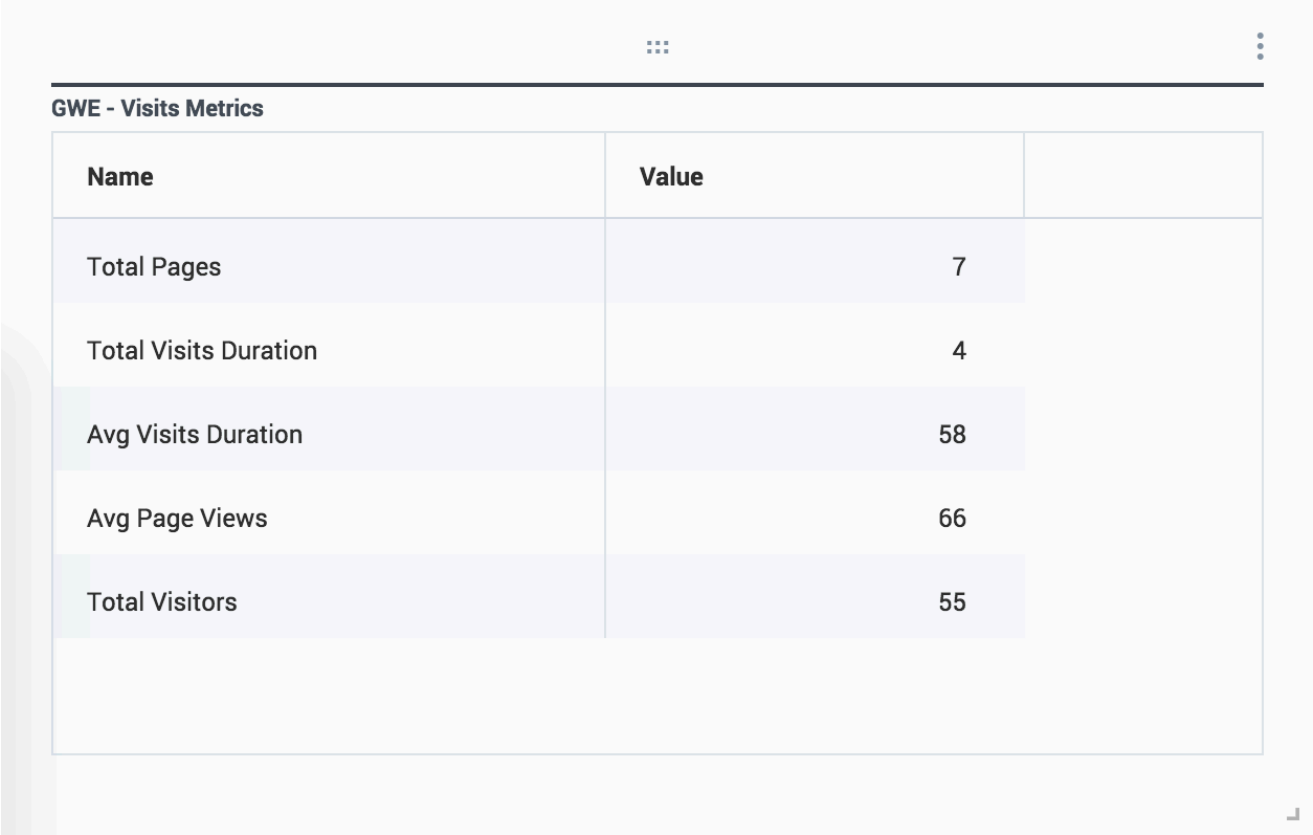
- **Visits** is the total number of visits since midnight.
- **Page Views** is the total number of page views since midnight.
- **Pages/Visits** is the average number of pages viewed per visit since midnight.
- **Avg Time On Site (sec)** is the average number of seconds spent on monitored web pages since midnight.

You can also display this information in the Extended View.


GWE - Web Traffic Today

Name	Value
Visits	1608
Page Views	3146
Pages/Visits	2
Avg Time On Site, sec	11

GWE - Visit Metrics



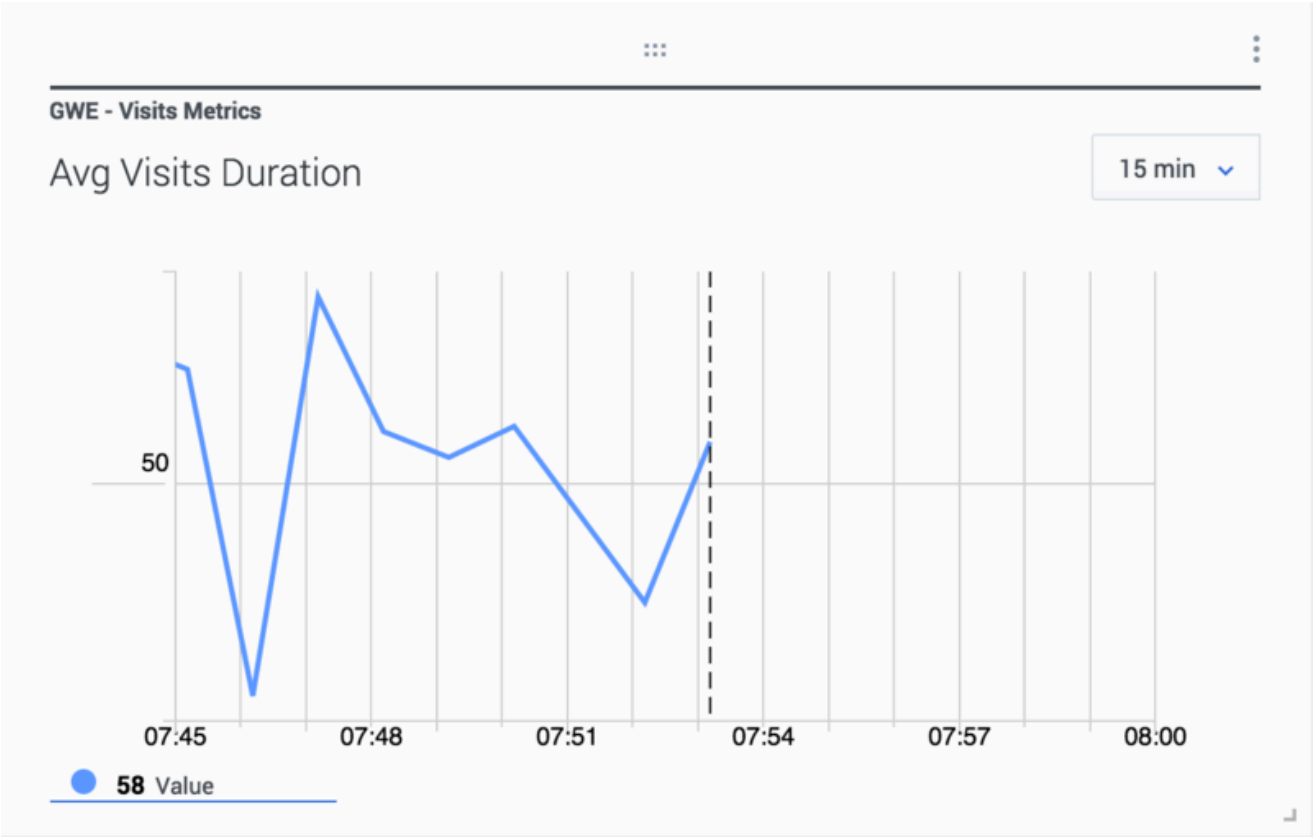
GWE - Visits Metrics

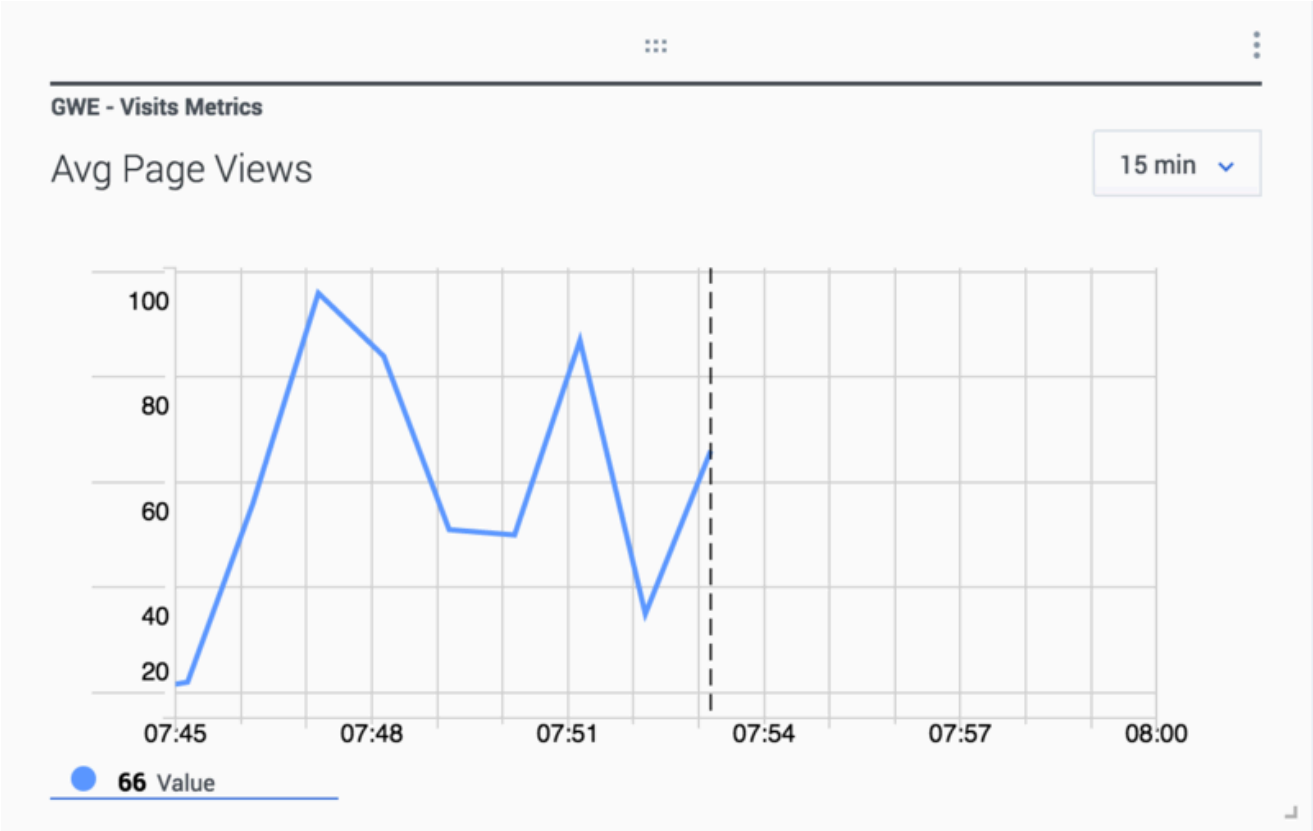
Name	Value
Total Pages	7
Total Visits Duration	4
Avg Visits Duration	58
Avg Page Views	66
Total Visitors	55

Contains the following metrics:

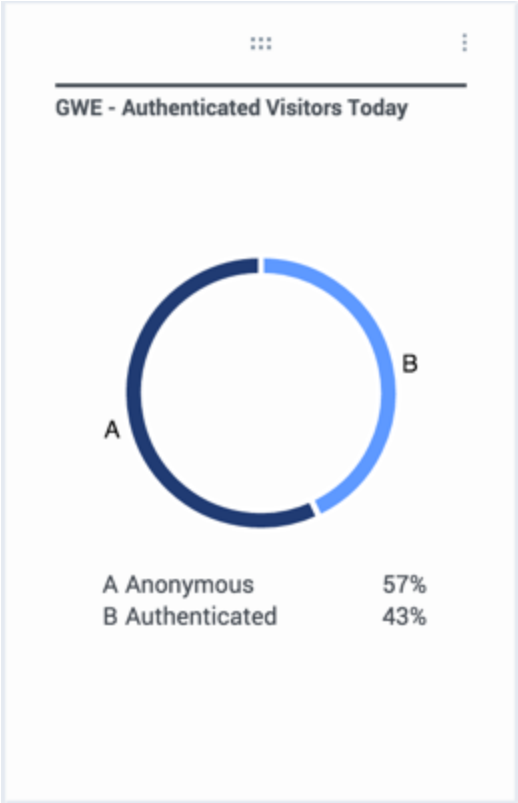
- **Total Pages**—The total number of page views for the last hour and a half.
- **Total Visit Duration, sec**—Summary total of the number of seconds spent by all visitors on the site during the last hour and a half.
- **Average Visit Duration, sec**—The average number of seconds for visits that occurred during the last hour and a half.
- **Average Page Views**—The average number of pages visited for each visit during the last hour and a half.
- **Total Visitors**—The total number of active visits during the last hour and a half.

You can also view Average Visit Duration and Average Page Views as trend lines:


GWE - Visits Metrics
Avg Visits Duration
15 min
50
07:45
07:48
07:51
07:54
07:57
08:00
58 Value


GWE - Visits Metrics
Avg Page Views
15 min
100
80
60
40
20
07:45
07:48
07:51
07:54
07:57
08:00
66 Value

GWE - Authenticated Visitors Today



Shows how many anonymous users and authenticated users have visited the site since midnight. You can find more information about types of visitors here.

GWE - New vs. Returning Today

How Many Returning Visitors Did We Get Today?

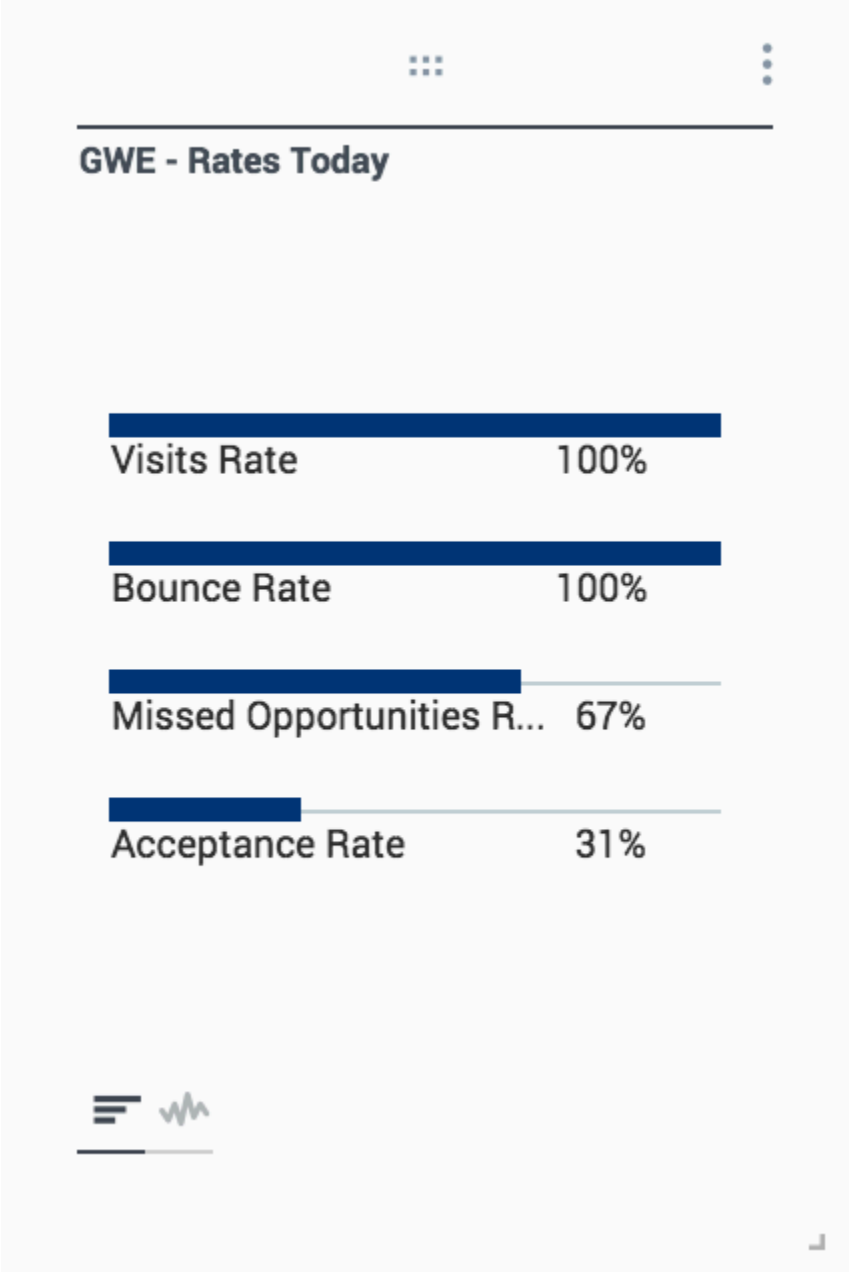
Shows how many new and returning users have visited the site since midnight.

- **New user**—has only visited once since midnight
- **Returning user**—has visited two or more times since midnight

A user starts a new visit each time one of the following conditions is met:

- There is a new browser instance on the user's device.
- A previously started visit that was within the scope of the existing browser instance (cookie) has expired. **Note:** The visitExpirationTime configuration option determines how many seconds can pass between visits and still have someone be considered a returning visitor. The default setting is 24 hours.

GWE - Rates Today



Shows the most common engagement rates, calculated for visits that started after midnight.

The **Bounce** rate shows the percentage of visits that only included a single page, whether or not the visit led to an engagement attempt.

The **Missed Opportunities** rate is the percentage of qualified customers who were not offered an engagement due to a decision in the routing strategy, based on factors such as the lack of available agents.

The **Acceptance** rate shows the percentage of visitors who have accepted an engagement request.

*A note on the **Visit Rate**:*

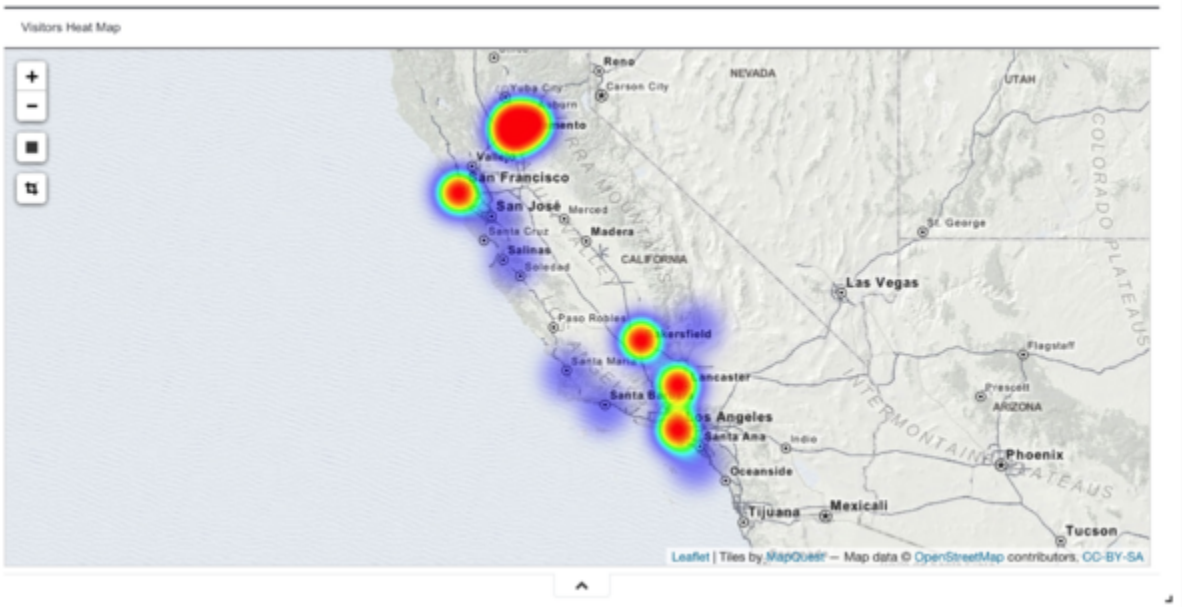
By default, this widget displays the **Visit Rate** statistic, which always has a value of 100 percent. (We have to include it in the widget so we can base the values for the other statistics on the total number of visits.) You can hide it in the Add Widget wizard, as we did before taking the picture on this page.

Extended Views

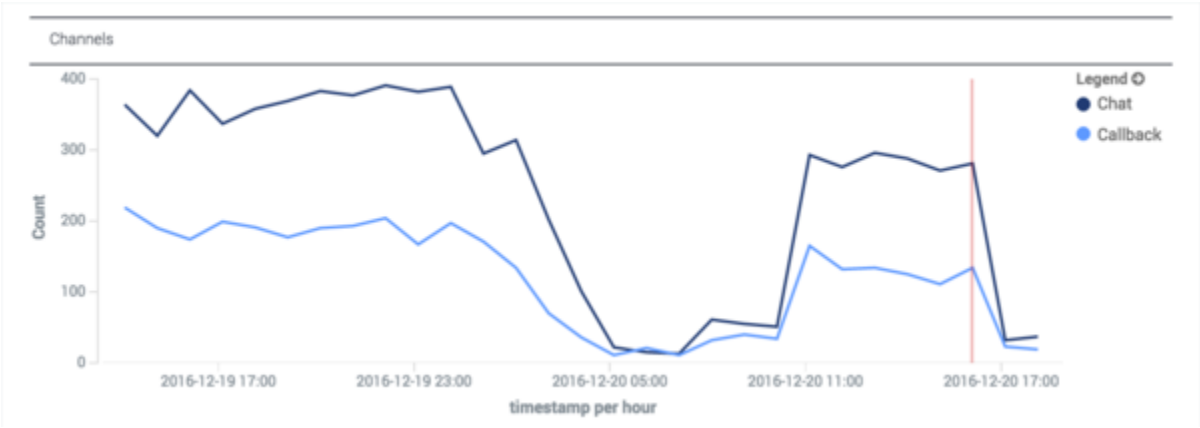
You can expand the Engagement Summary Today and Web Traffic Today widgets to display dedicated dashboards that contain their own sets of widgets.

Just click the three vertically placed dots in the upper-right corner of your widget and select "Expand to Tab":

The resulting dashboards give you creative new ways of looking at the information displayed by the widgets from which they are accessed. For example, here is a heat map based on your daily traffic information, showing where your visitors are located:



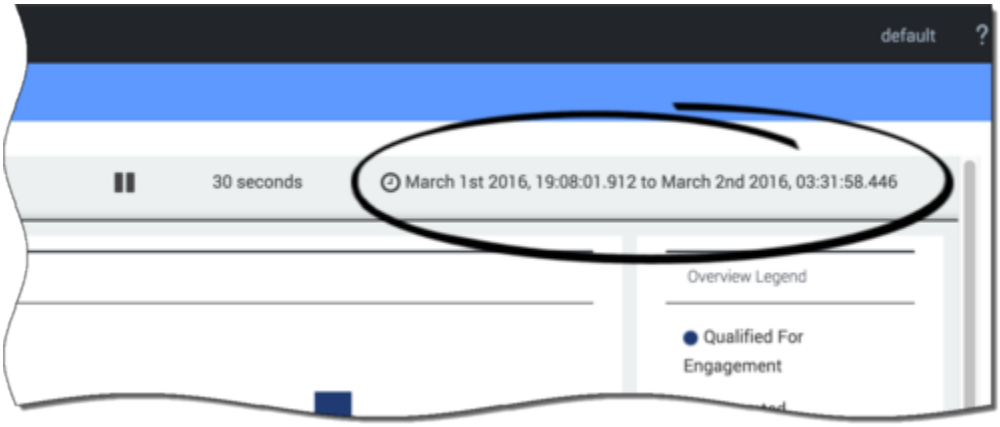
And a trendline from your Engagement Summary dashboard showing which channels have been offered over a period of a bit more than a day:



The next section discusses how to change this time frame to just about anything you might want.

Extended View Time Filter

The Engagement Summary Today and Web Traffic Today Extended Views include a time filter that you can use to restrict your data to a specific time frame. You can access this filter by clicking in the upper right corner of your dashboard.

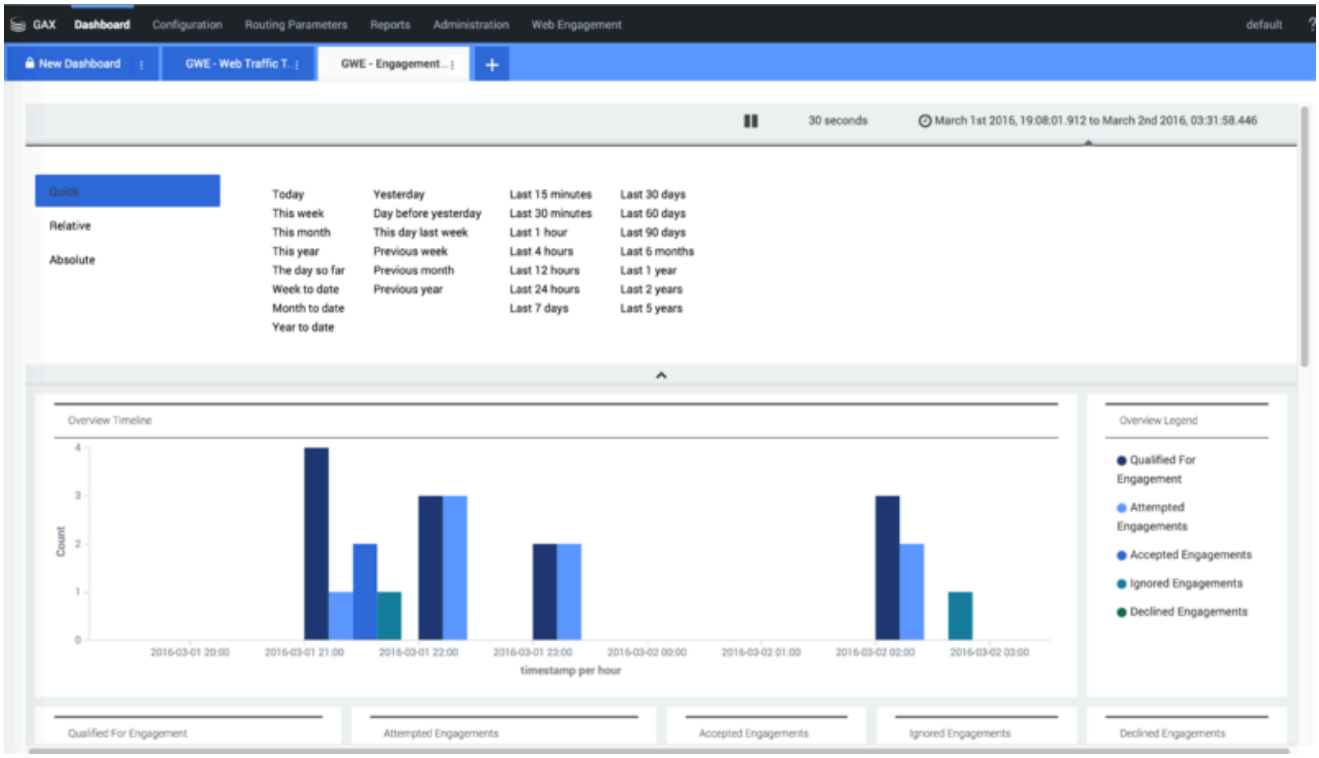


You can configure the time filter configure in three different ways, as shown in the next three sections.

When you are finished, you can hide the time filter menu by clicking the chevron button on the bottom—or just click again on the time frame in the top right corner.

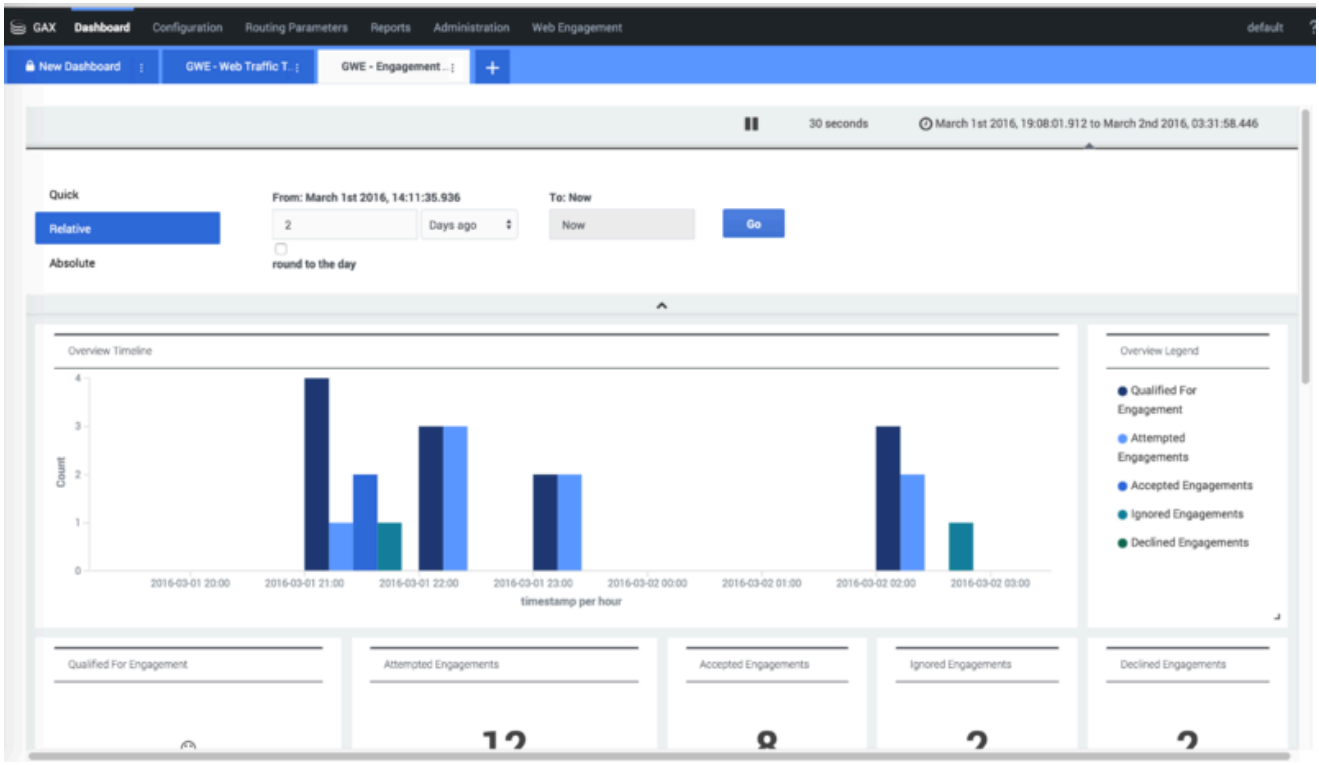
Quick Filter

This menu lets you choose from a variety of commonly requested time frames. By default, the time frame is set to **Today**.



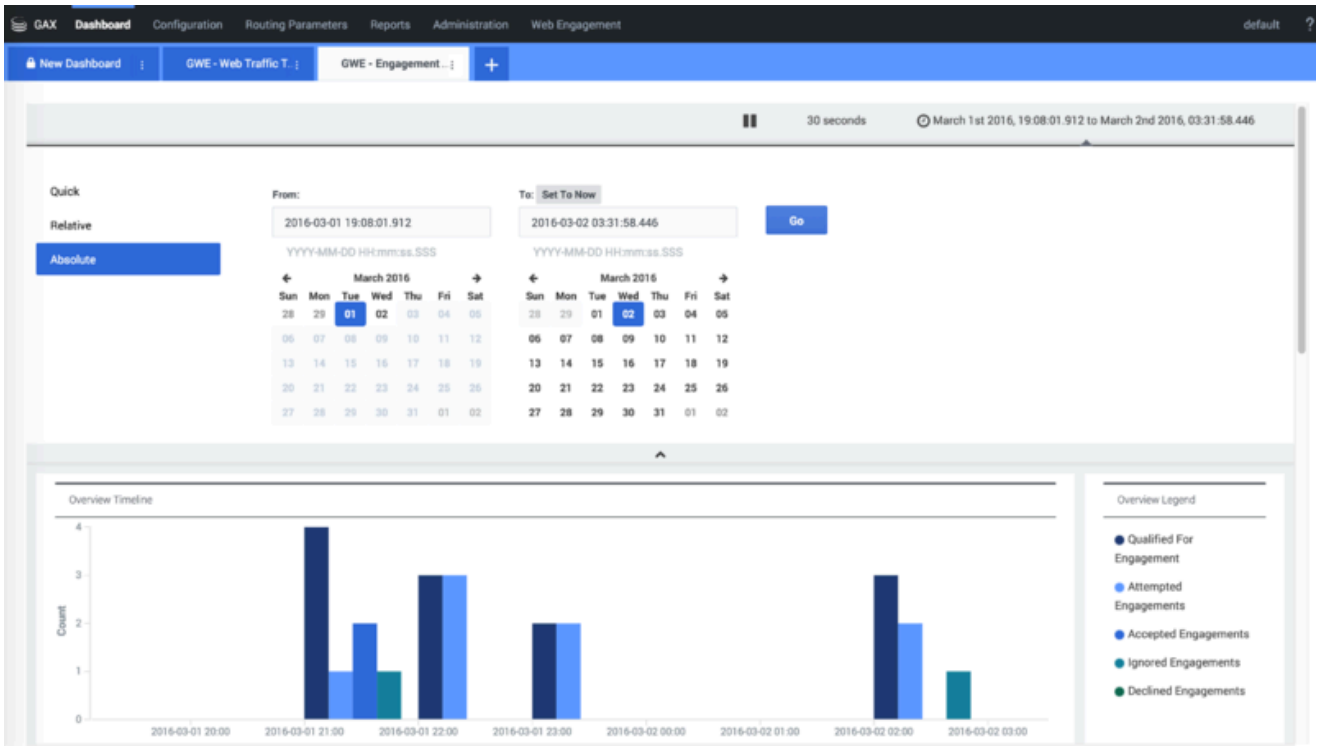
Relative

With this one, you can decide how far back you want to start your filtering, capturing all of the data from that starting point to the present moment.



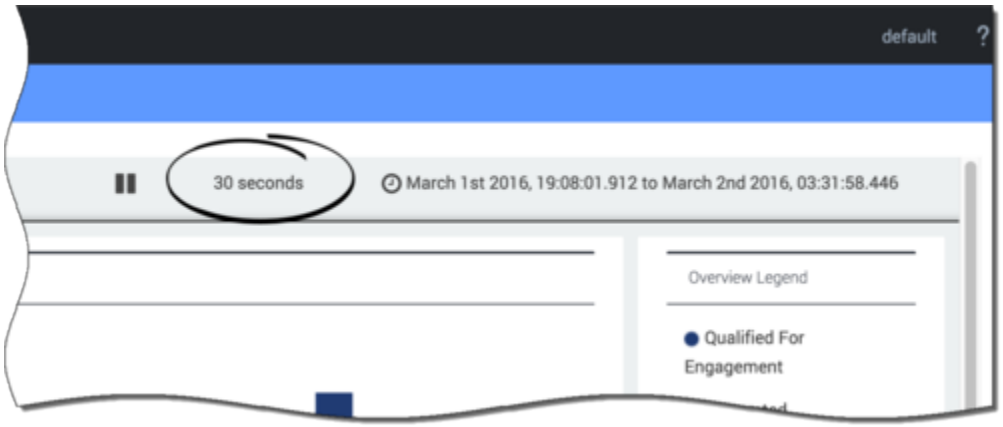
Absolute

This menu lets you select an absolute starting point and an absolute ending point for your data.



Refresh Rate

The default refresh rate is set to 30 seconds and can be changed, paused, or started using a menu that is displayed when you click on the current refresh rate.



You can set your refresh rate to 5 seconds or to an entire day.

Zooming In

You can click and drag to select a portion of a timeline. When you do this, the timeline expands so that you can focus on the time frame that you selected:

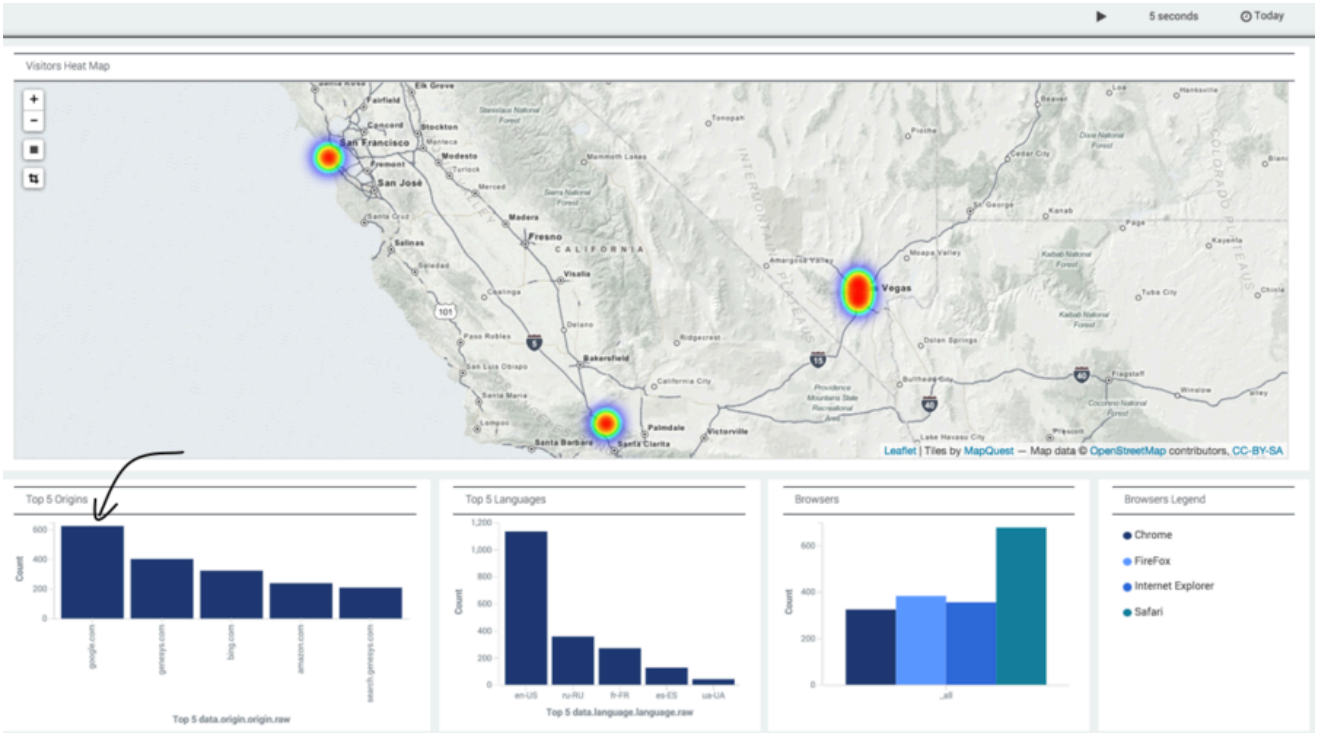
After zooming, the data will look like this:

Filtering

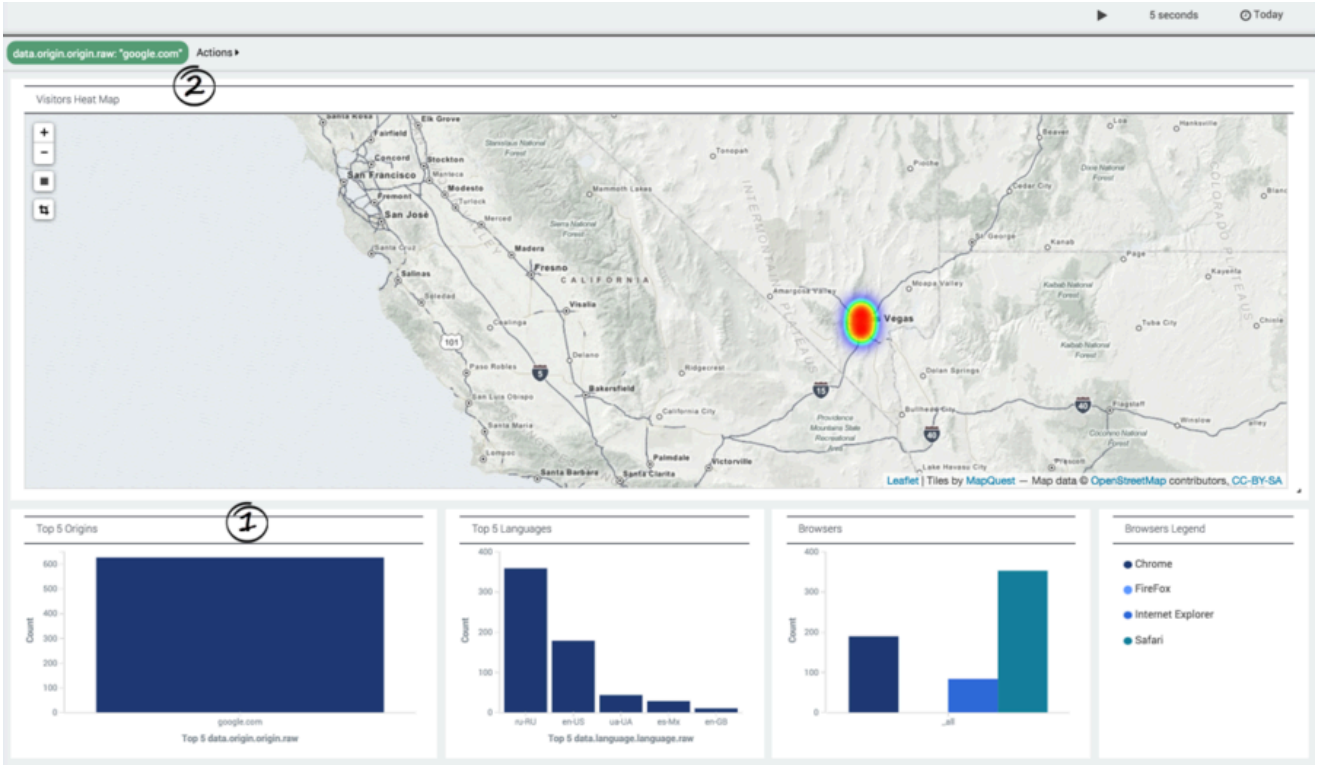
Widget-Based Filtering

You can also click many different items in the extended view, such as bars, circles, dots, lines, chart layers—give it a try! When you do, the dashboard creates a new filter that you can apply to the data that comes into the dashboard.

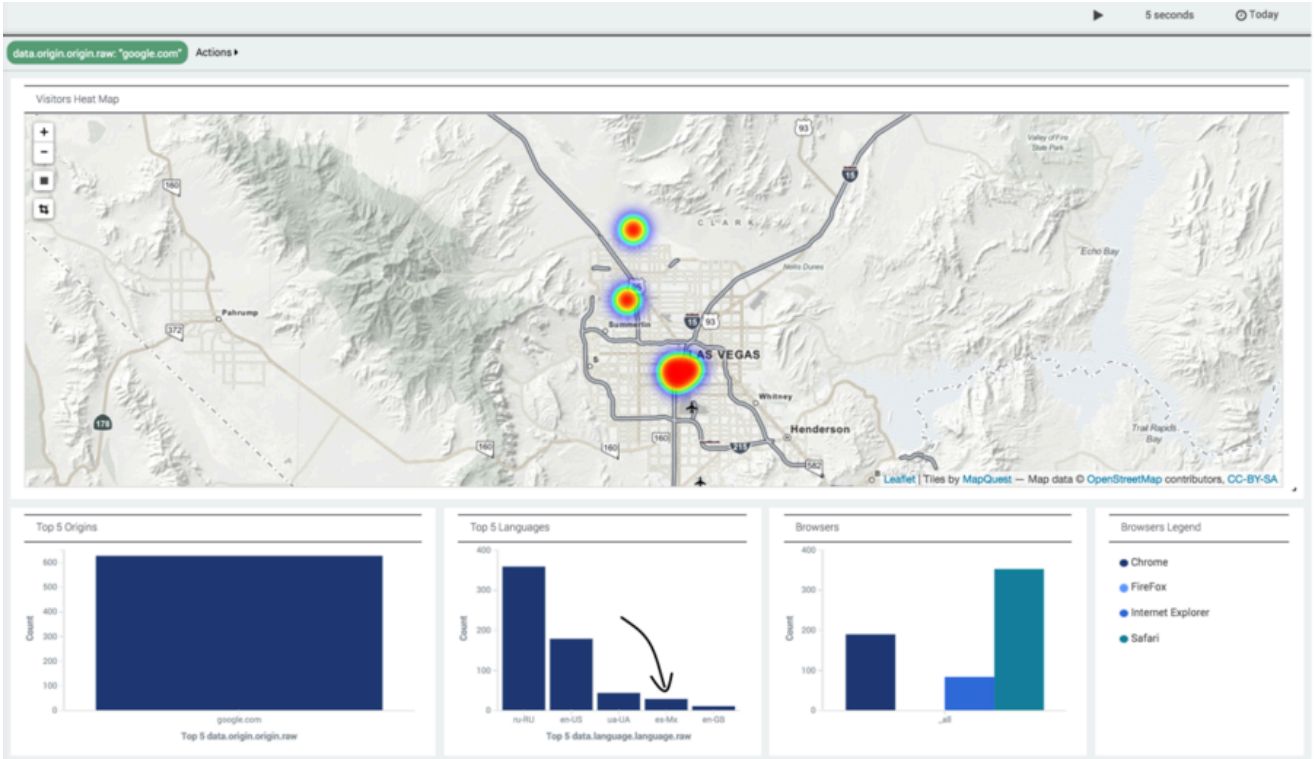
The curved arrow in the lower left of the following figure is pointing to the **google.com** section of the **Top 5 Origins** bar widget. If you click that section, you will filter out the other origins.



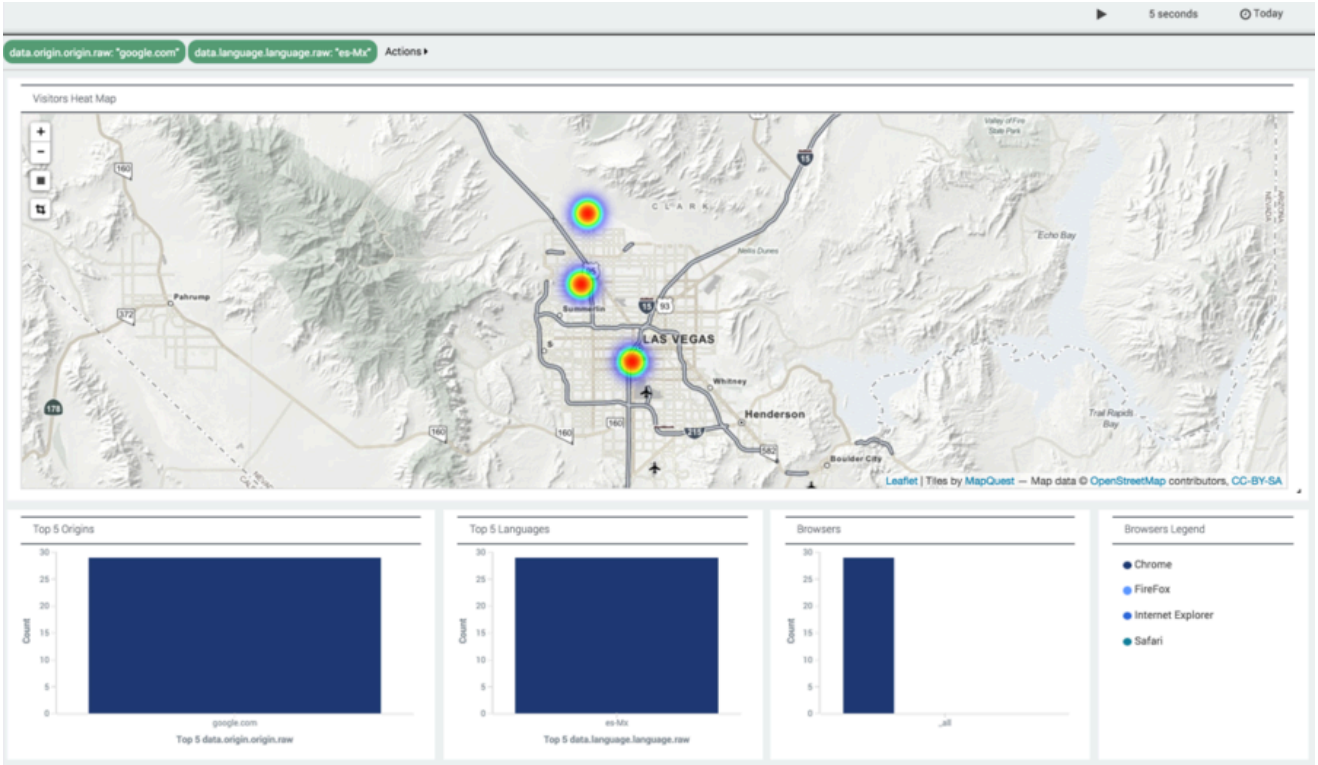
In the next figure, you can see that the **Top 5 Origins** widget **(1)** is only showing **google.com**, meaning that we are only picking up hits from people who arrived at our site from google.com. Notice also that a green filter icon has been added in the upper left of the image **(2)**, which confirms this.



Since all of the Google-based traffic originates in the Las Vegas area, let's zoom in by clicking the plus sign in the upper left corner. The arrow in the bottom of the screenshot is pointing to one of the **Top 5 Languages**, **es-Mx**, which is Mexican Spanish.



By clicking on the **es-Mx** bar, you can filter out everyone who is using a language other than Mexican Spanish, as shown in the screenshot below. We now have two green filter icons in the upper left, and there is only one bar in the **Top 5 Languages** widget.

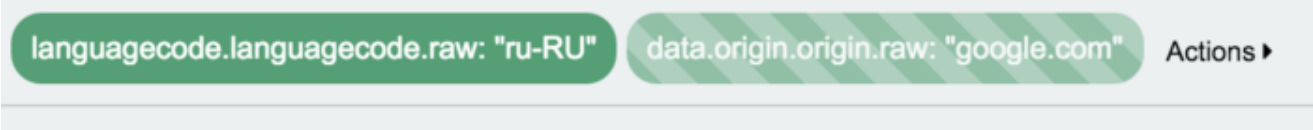


When you hover over a green filter, four new options appear, allowing you to:

- Disable the filter or re-enable it
- Pin or unpin it
- Include or exclude it
- Remove the filter

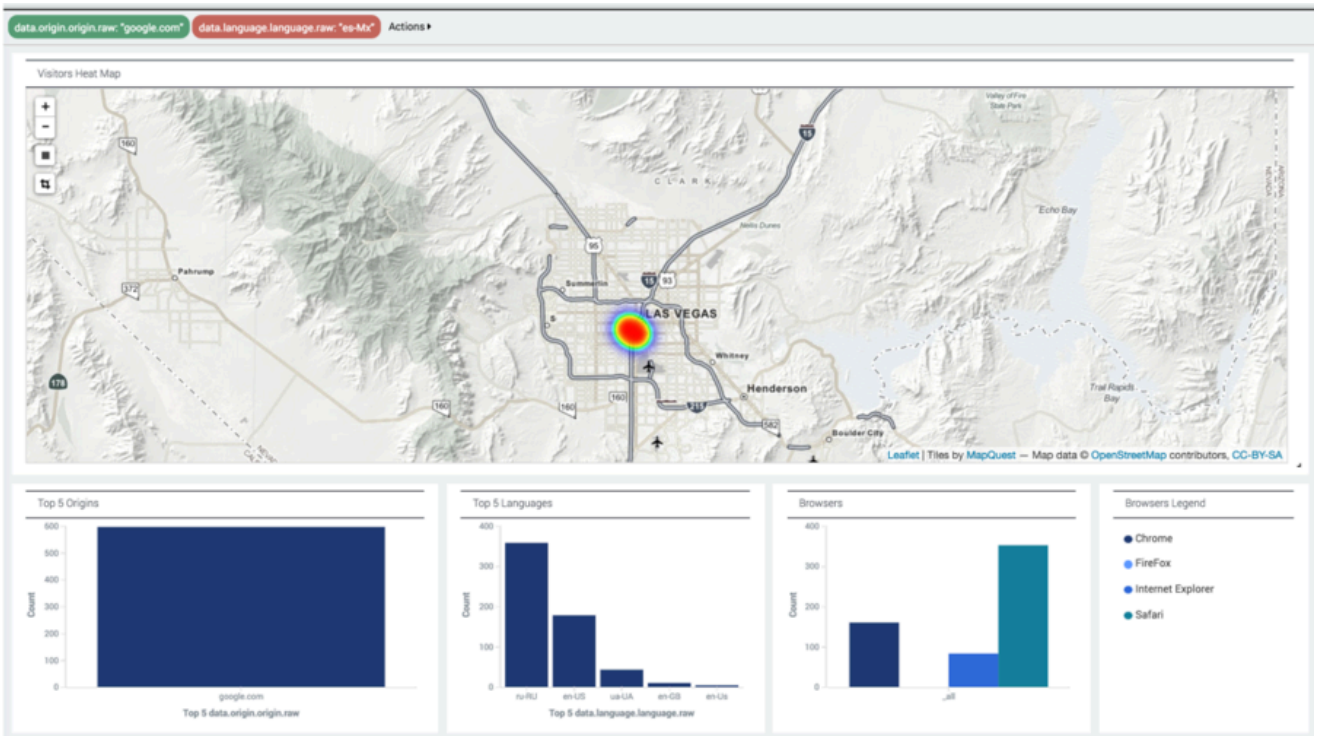
In the following graphic, which comes from a different session, we are hovering over the **google.com** filter. This displays icons that allow us to apply any of the four options to that filter.

We have disabled the **google.com** filter by clicking on the round-cornered rectangle:



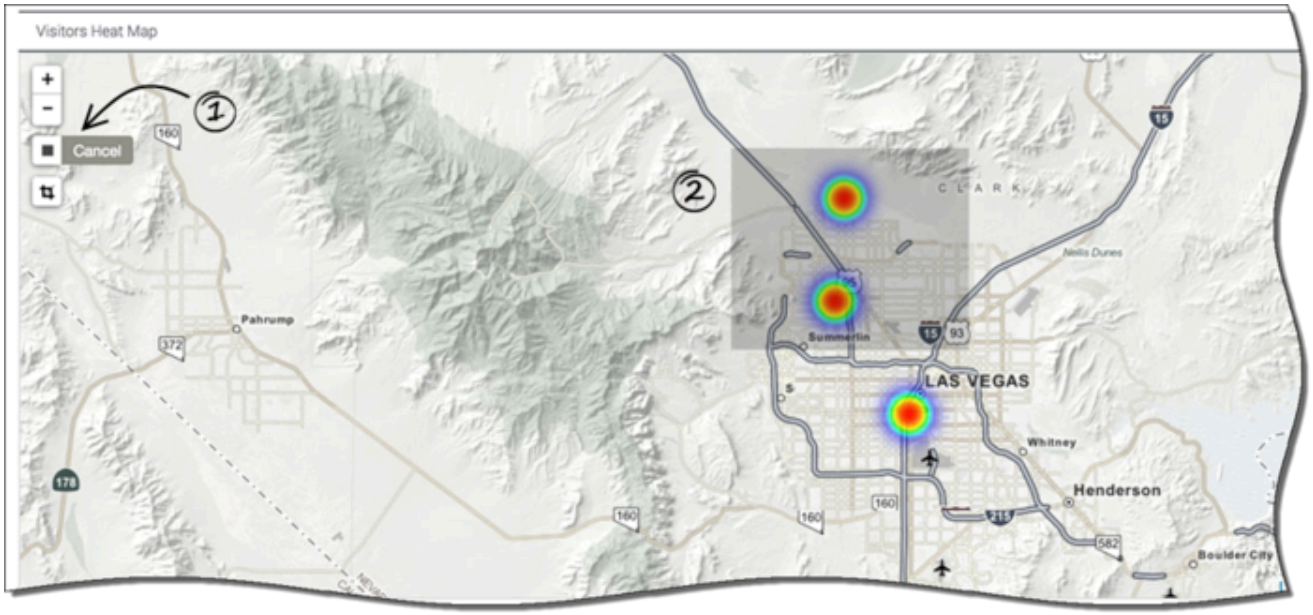
Coming back to the current session, let's see what happens when we exclude Mexican Spanish. Note that:

- The **es-Mx** filter is now red.
- We are showing traffic in all languages *except* Mexican Spanish.

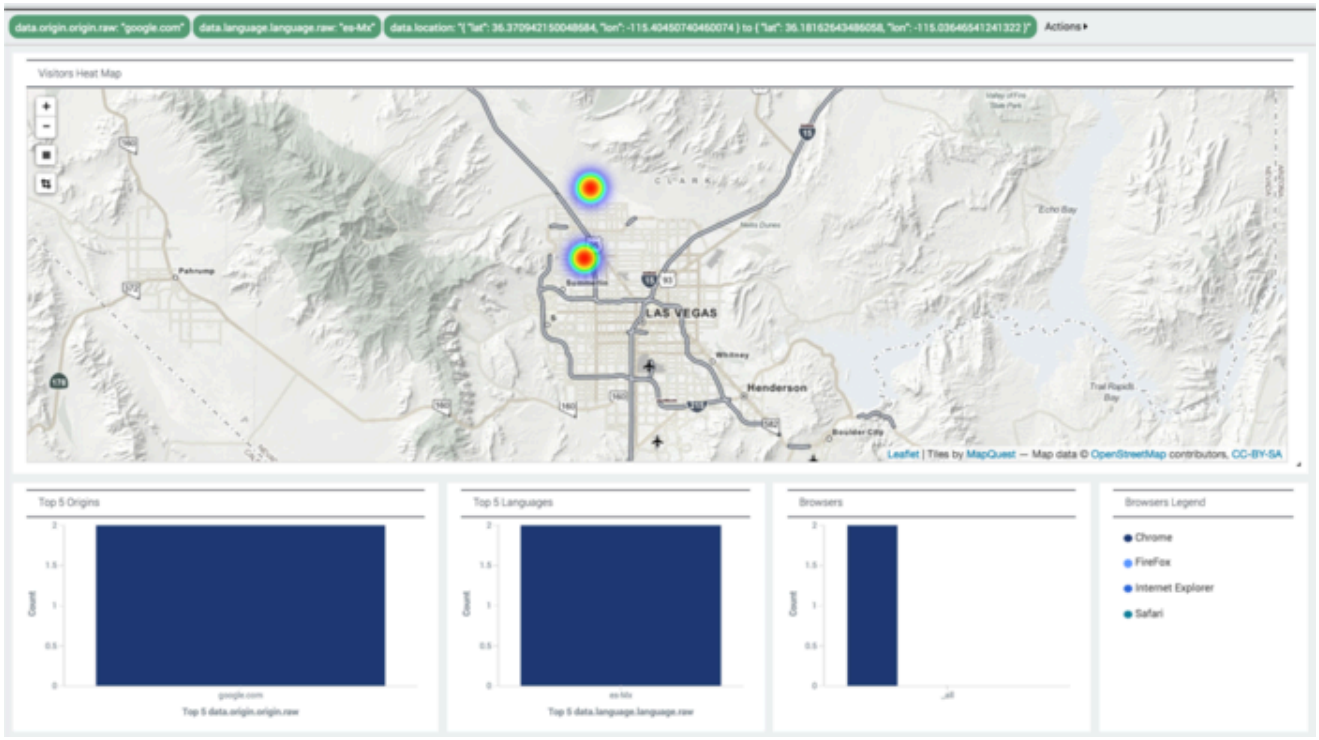


Filtering by Geographical Coordinates

You can use the Rectangle tool to restrict heat map values to just the part of your map that you want to focus on. Click the dark rectangle icon **(1)**. Then click and drag on the desired section of the map **(2)**:



Here's the result. Note that the values for downtown Las Vegas are filtered out, even though that area is still displayed on the map:



Combining Filters

As we showed you in the previous diagram, you can combine geographical filtering with other types of filtering. In that diagram, we have filtered our results in three ways:

- By origin
- By language
- By geographical coordinates

Engagement Summary Today Extended View

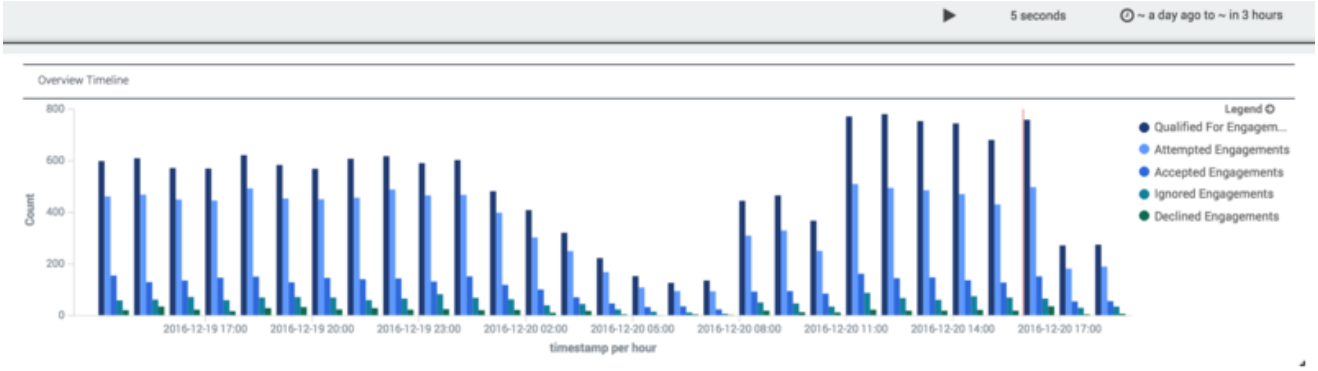
If you expand the Engagement Summary in the Basic View, you see a dashboard like this:

You can choose which of these elements to display, and you can filter your data, as mentioned on the Extended Views page.

Overview Timeline

The Overview Timeline uses a grouped bar chart to display historical engagement information, with each group calculated on an hourly basis.

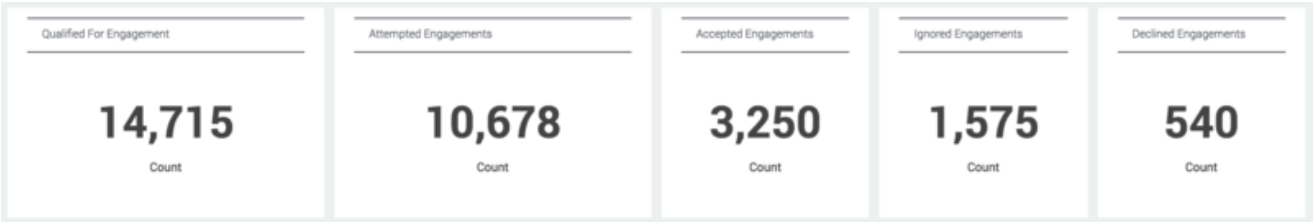
The information in this chart is derived from all events that have occurred within the time frame established by the time filter, which is set to **Today** by default. The metrics used in this chart are explained in the next section.



Overview Timeline - KPI Widget Set

This set of KPI widgets shows a summary of important engagement statistics from within the time frame established by the time filter. These statistics are used in the Overview Timeline described in the previous section.

Note: These statistics are different from the ones displayed in the GWE - Engagement Summary Today basic view.



KPI Metrics

- **Qualified For Engagement**—Total number of visits that have triggered a

HotleadIdentifiedActionableEvent event from one of the rules set up for Web Engagement

- **Attempted Engagements**—Total number of visits that have led to an engagement offer (**Disposition** event)
- **Accepted Engagements**—Total number of visits for which an engagement offer was accepted
- **Ignored Engagements**—Total number of visits for which an engagement offer was ignored
- **Declined Engagements**—Total number of visits for which an engagement offer was declined

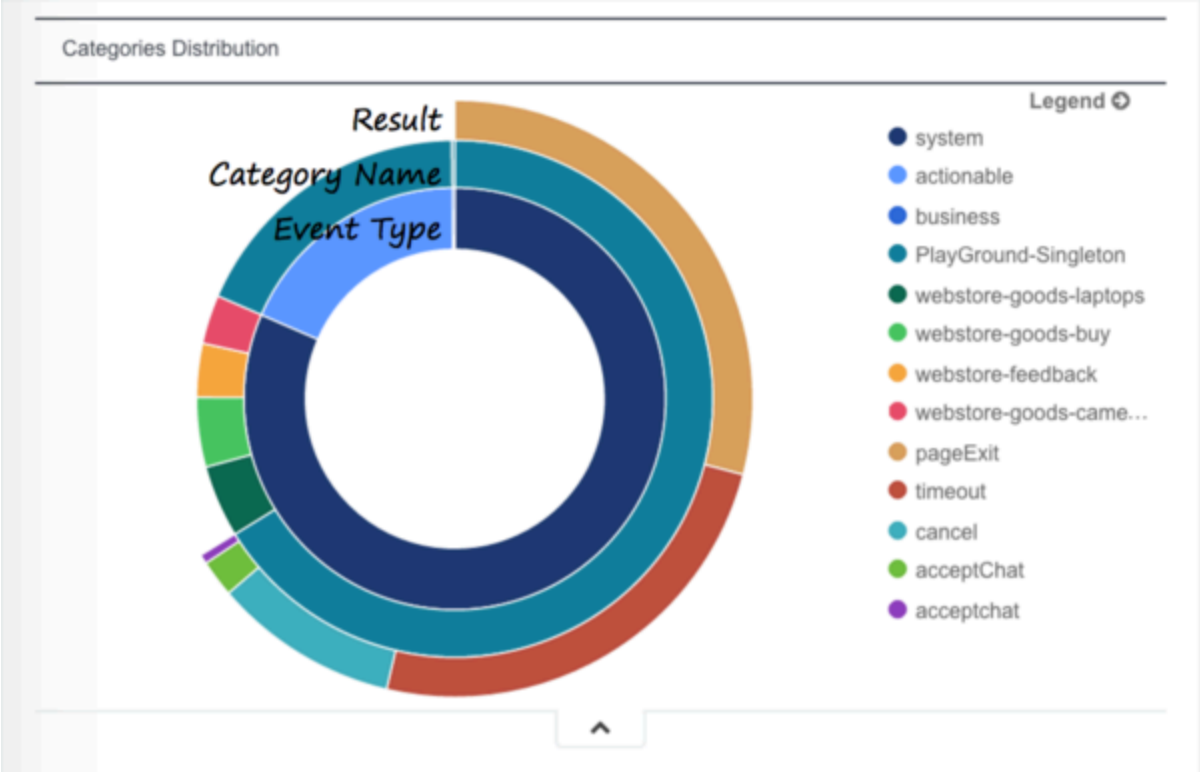
Note: A single visit may include more than one engagement attempt. For example, a banner ad could be followed by an offer to chat.

Category Distribution

The Engagement Summary Today extended view includes a widget that can be extremely useful when you need to understand how a category leads to a certain result. This widget displays a sunburst of distributed categories within three layers:

- Event Type (the **inner ring**)
- Category Name (the **center ring**)
- Result (the **outer ring**)

These layers represent hierarchical data, starting from the innermost ring, and working outwards. As you work your way out, through the rings of the chart, the data that is adjacent to any given segment of an inner ring forms a subset of its data, as you can see if you take a close look at this example:



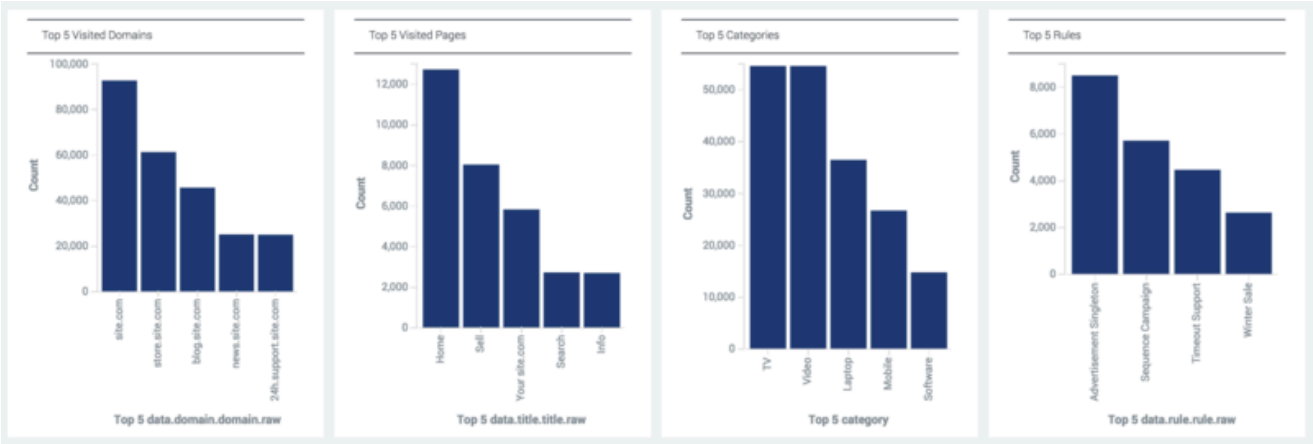
Although sunbursts aren't intuitive to everyone, this one might be the best way to present the information you need.

Top 5 Widget Set

The widgets in this set show the number of hits for the Top 5:

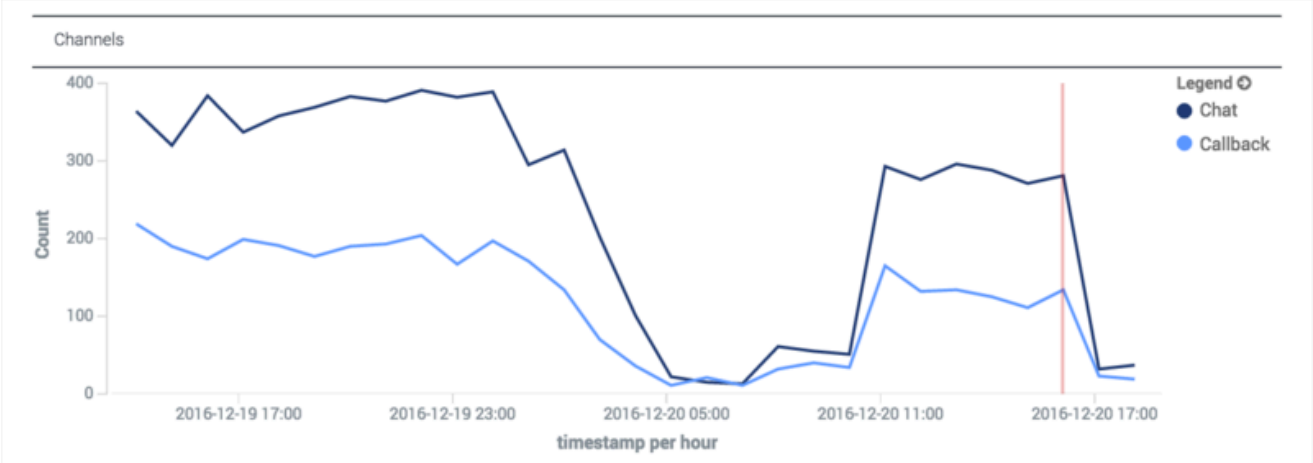
- **Domains** visited by customers during their journey
- **Pages** they visited during their journey
- **Categories** set up on the pages they visited
- **Rules** they triggered

These values are all based on the time frame established by the time filter.



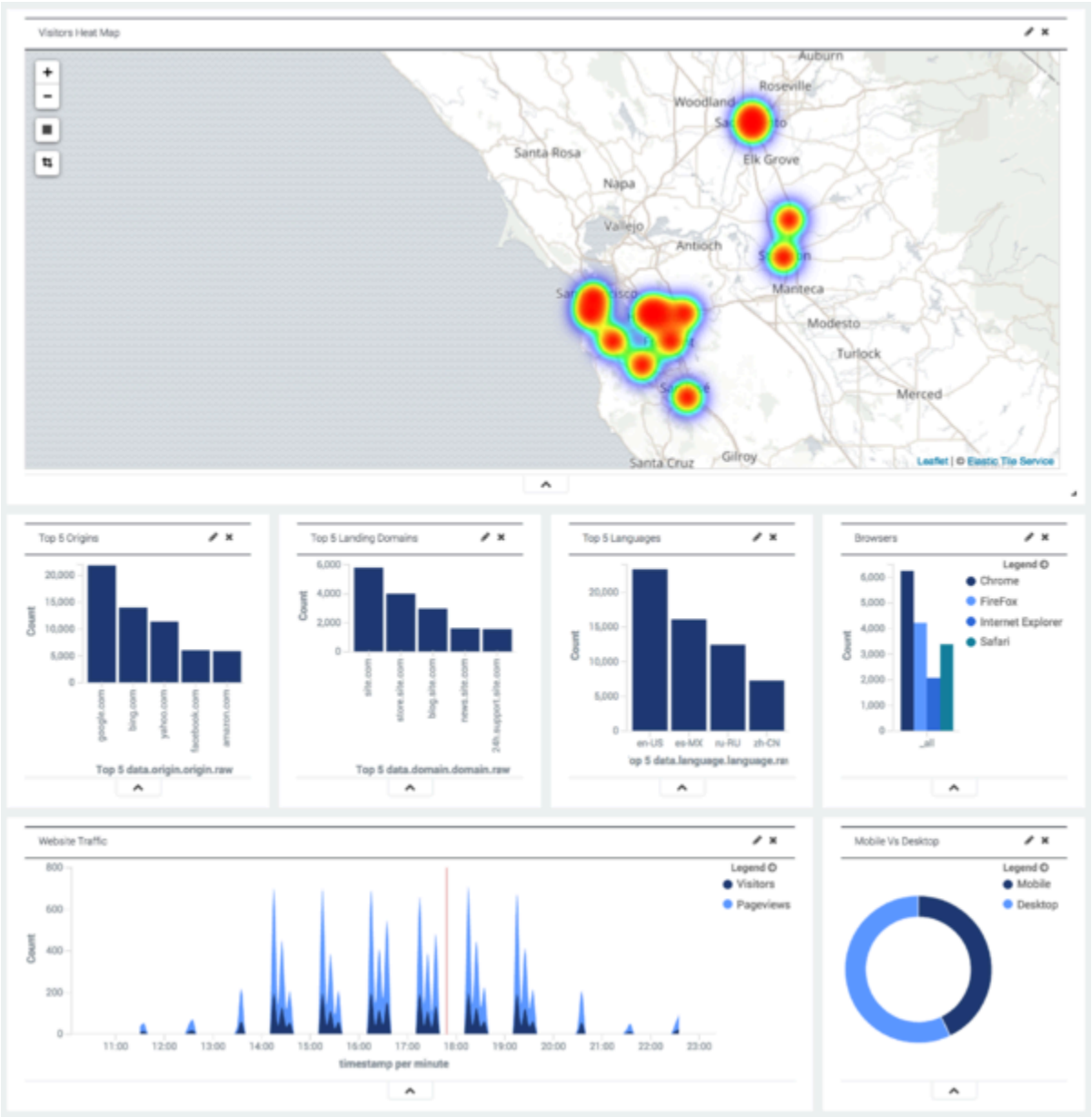
Channels

This widget shows trend data for chat and web callback engagements accepted within the given time frame.



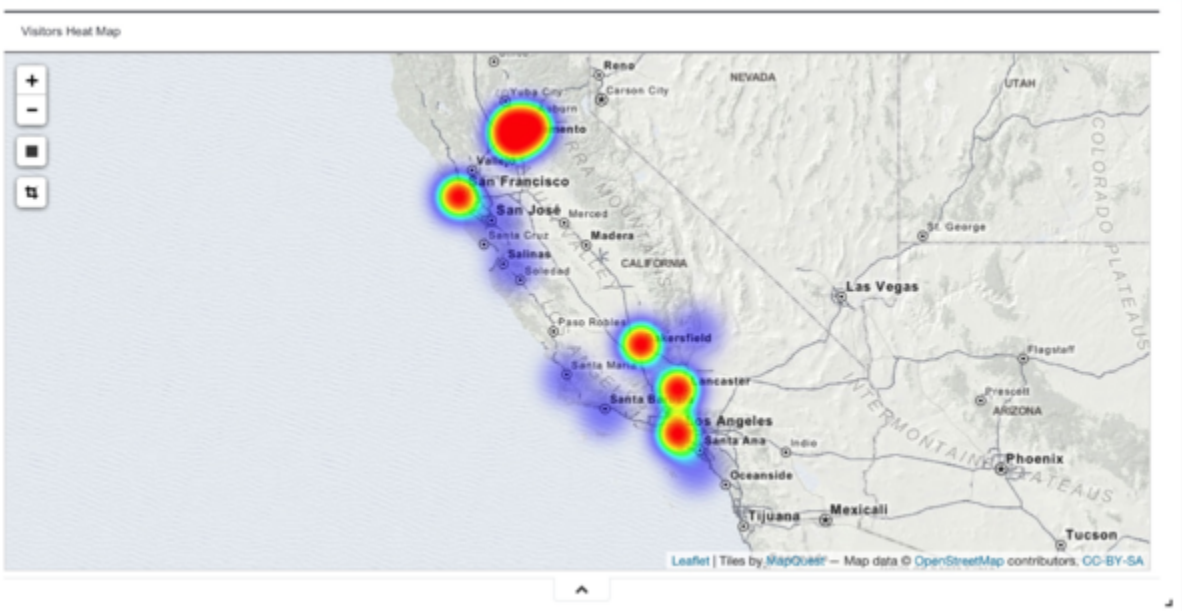
Web Traffic Today Extended View

Here is the dashboard you will see if you expand the Web Traffic Today widget:



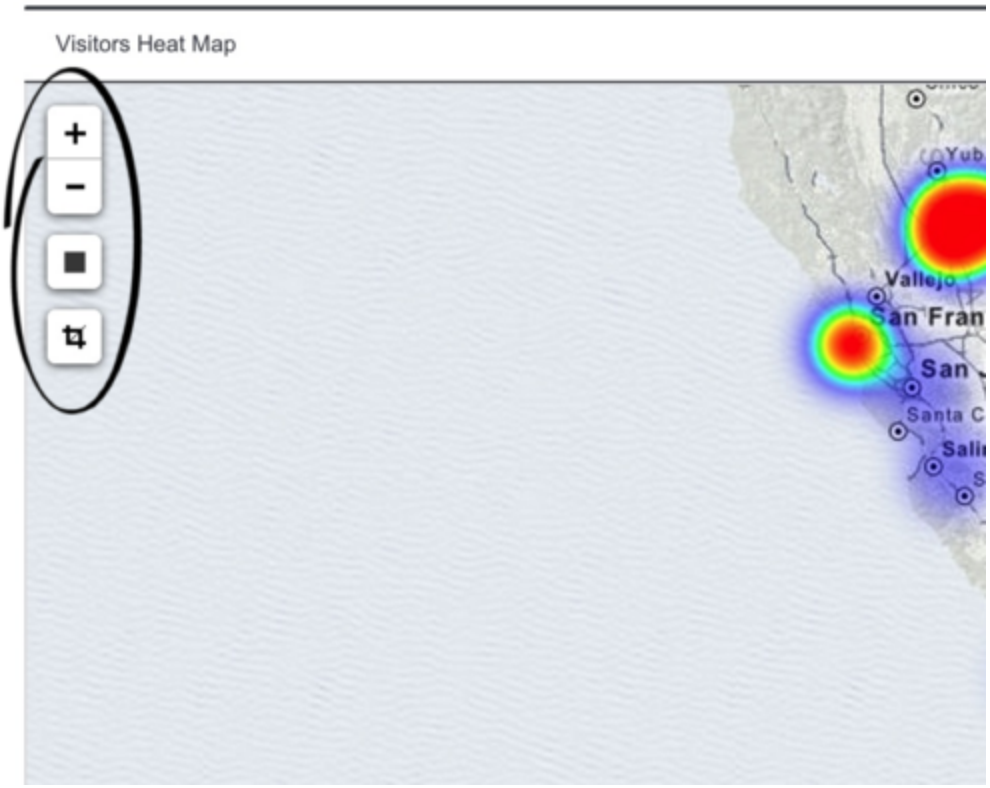
This view includes a heat map that displays important information about the locations of your visitors, using the time frame established by the time filter. **Note:** By default Web Engagement does not collect visitor IP addresses. If you want to analyze this data, you must have your system

administrator turn this feature on explicitly.

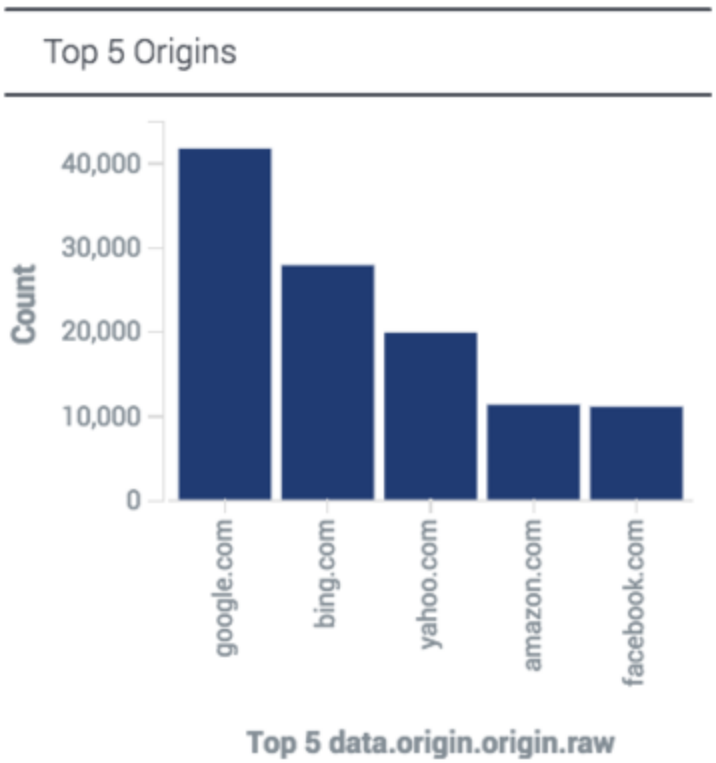


The heat map shows areas with the greatest number of visitors in red, while locations with smaller numbers of visitors are indicated in purple.

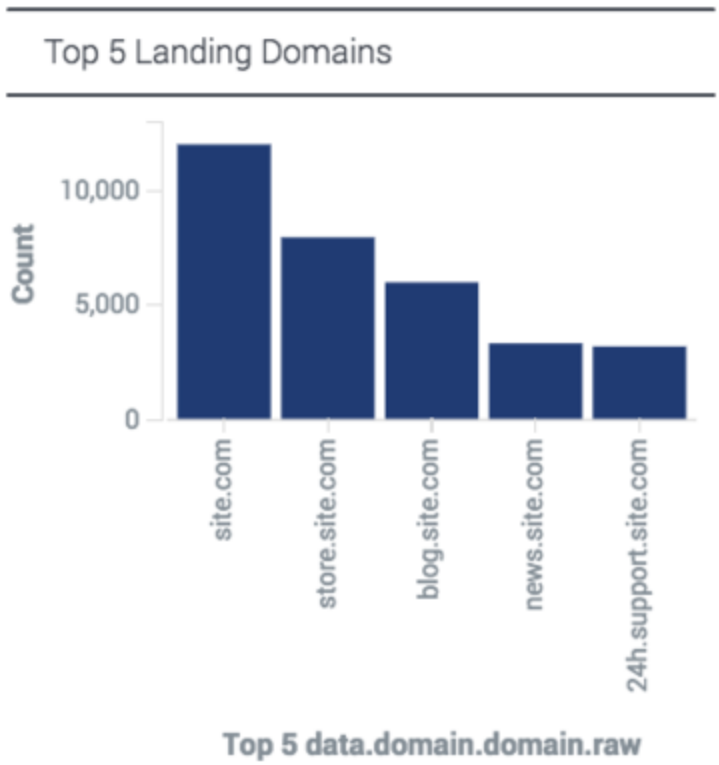
Note that the heat map also has resizing and cropping tools:



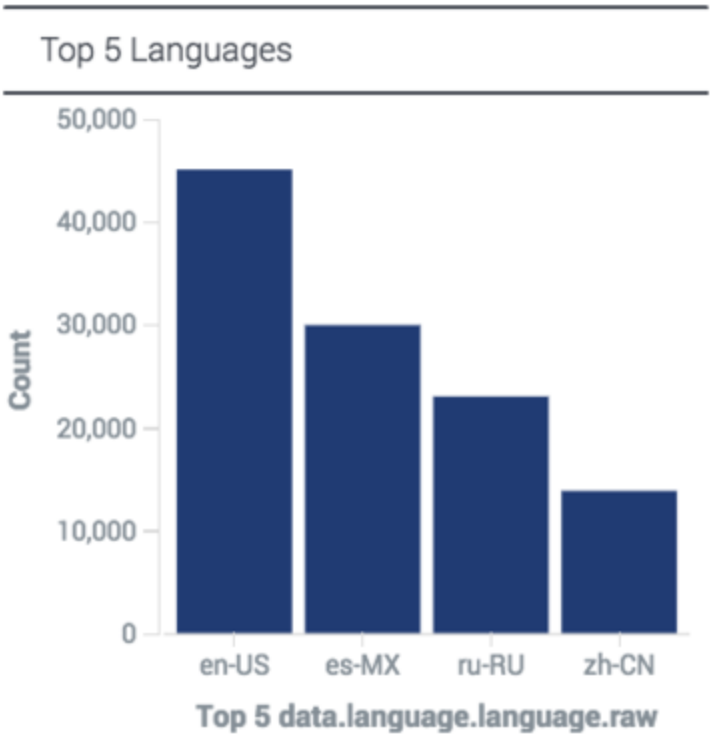
You can also see the Top 5 websites your visitors have arrived from within the given time frame:



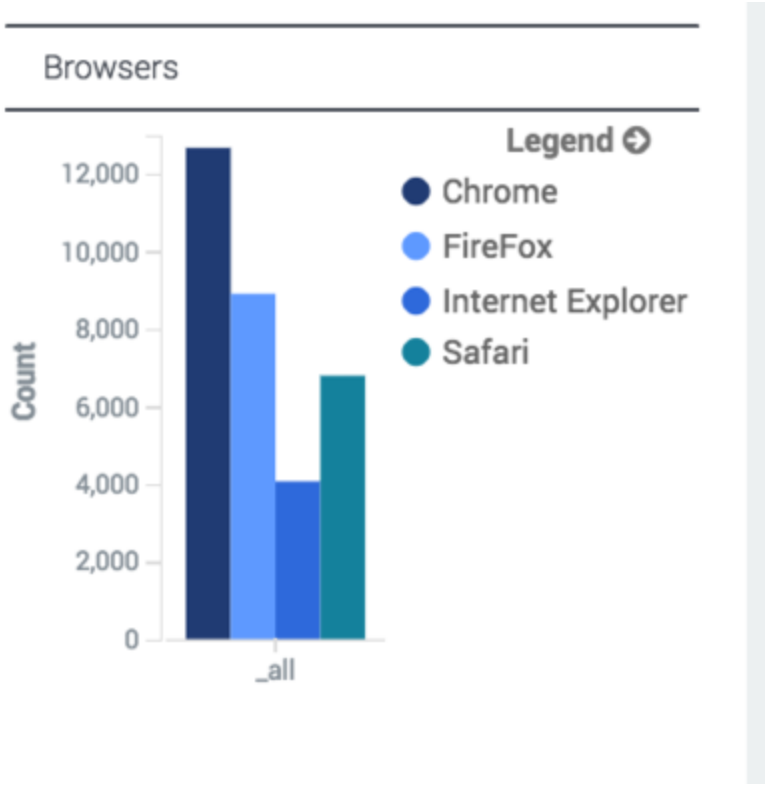
The Top 5 domains they have landed on:



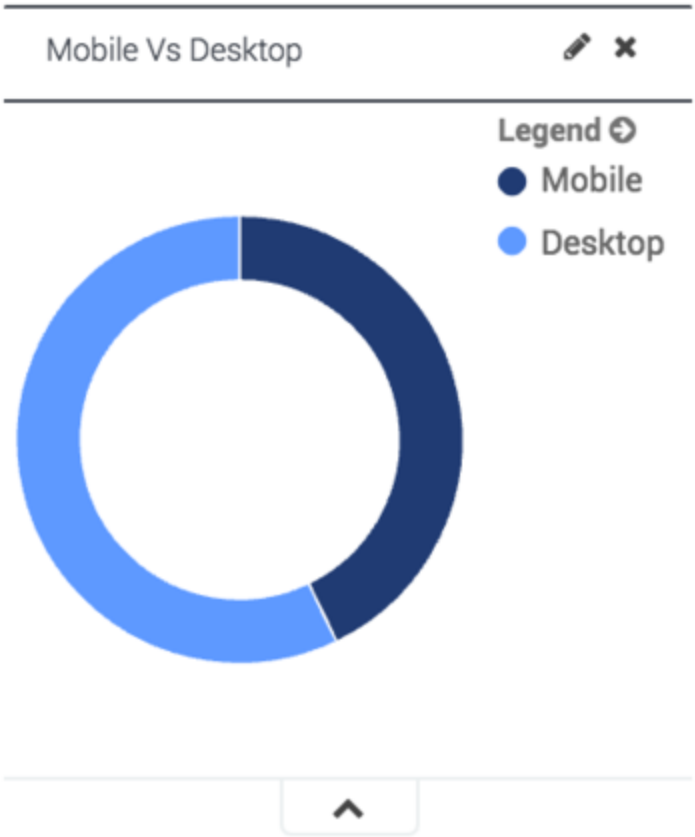
The Top 5 languages your visitors have been using:



As well as which browsers they are using:

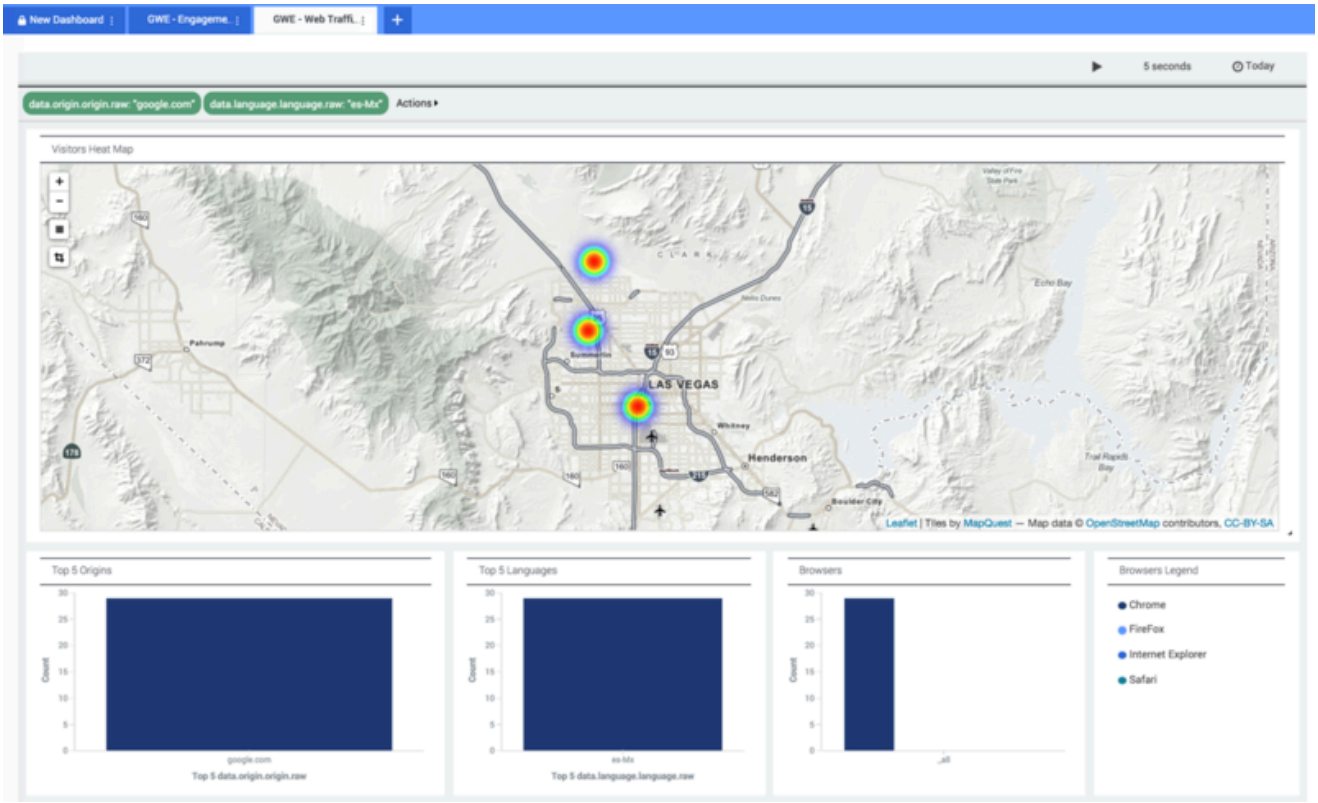


And how many mobile users and desktop-based users have visited the site since midnight:



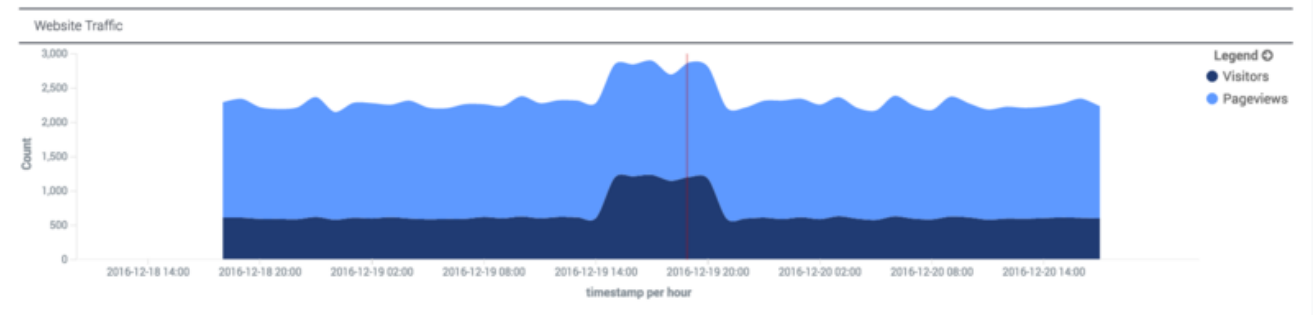
The number of mobile users is calculated on the basis of browser-side data stored in the userAgent property. The desktop total is the number of users who were not using a mobile device. For more information about the relevant visitor data, refer to the article on Event Structure.

You can even filter the heat map by Top 5 Origins or by Top 5 Languages. This image shows geolocation results filtered down to people who arrived from "google.com" and are using Mexican Spanish:



Website Traffic

This dashboard also includes a layered timeline graph that displays how many visitors have come to your site and how many pages they have viewed, using the time frame established by the time filter.



CCPulse Reporting

Genesys Web Engagement includes standard CCPulse+ templates you can use for real-time interaction reporting. These templates report on the two kinds of Genesys interactions that GWE produces:

- **Pre-engagement phase interactions** are a specialized type of Open Media interaction called `webengagement`.
- **Engagement phase interactions** are chat or web callback interactions, depending on the selected channel.

To learn more about how to import the standard reporting templates into CCPulse+, see CCPulse+ Standard Reporting Templates. Note that you can also create customized reports from the statistical data produced by Genesys Web Engagement.

Note: You can still use CCPulse+ with Web Engagement 8.5, but please bear in mind that Pulse tracks certain kinds of activity that are not visible to CCPulse+. For example, Pulse provides information about website user activity that occurs prior to the engagement offer, whereas CCPulse+ is limited to activity that starts at the point of engagement. Pulse also provides device information, as well as other contextual data that is not available to CCPulse+.

Pre-engagement Phase Reports

Web Engagement includes the following reports based on pre-engagement phase interactions:

- **Qualified** `webengagement` interactions — The number of rules that are triggered on your website.
- **Engaged** `webengagement` interactions — The number of qualified interactions that meet the engagement strategy requirements.
- **Accepted** `webengagement` interactions — The number of engaged interactions that were accepted when a site visitor clicked the **accept** button on the engagement invite.

> ### Warning
> Accepted interactions do not always start a chat or voice engagement interaction. For example, a site visitor may be redirected to a registration form after accepting an engagement invite. If the visitor closes this form, the engagement interaction will not start.

- **Missed** `webengagement` interactions — The number of interactions that were rejected as the result of a negative decision in the Engagement Logic strategy.
- **Canceled** `webengagement` interactions — The number of interactions that were rejected when a site visitor clicked the **reject** button on the engagement invite.

> **Warning**
>
> If an engagement invite is closed because it reaches the timeout limit, Web Engagement does not consider this a cancelled `webengagement` interaction. This is done to exclude cases where the site visitor never sees the engagement invitation — for example, when the visitor has multiple tabs open and the engagement invitation is not on the current tab.

- **Failed** `webengagement` interactions — The number of failed interactions. This includes both engaged and qualified interactions that failed because of any number of reasons, such as:
  - The interaction does not meet the engagement strategy requirements. For example, there may be no agents available to handle the interaction.
  - The interaction was triggered by a rule in test mode only.
  - The interaction timed out.

> **Important**
>
> You cannot filter Open Media interactions in Stat Server, which restricts some types of reports. For example, you cannot report the percentage of successful engagement attempts out of the total count of qualified Open Media `webengagement` interactions.

Engagement Phase Reports

You can create engagement phase reports based on the number of processed interactions and the information contained within those interactions. The following are some engagement phase reports that can be collected from Web Engagement:

- The number of chat or web callback interactions that are triggered by Web Engagement and processed by an agent or group of agents.
- The percentage of chat or web callback interactions that are triggered by Web Engagement and processed by an agent.
- The number of chat or web callback interactions that are triggered by a specific Web Engagement rule and processed by an agent or group of agents.
- The percentage of chat or web callback interactions that are triggered by a specific Web Engagement rule and processed by an agent.

CCPulse Standard Reporting Templates

Genesys Web Engagement provides the following standard reporting templates that can be imported into CCPulse+:

Pre-engagement Phase Templates

Web Engagement includes standard reporting templates for each Web Engagement statistics queue.

Reporting Template	Interaction Queue
WebEng_Accepted.xtpl	Webengagement_Accepted
WebEng_Engaged.xtpl	Webengagement_Engaged
WebEng_Failed.xtpl	Webengagement_Failed
WebEng_Missed.xtpl	Webengagement_Missed
WebEng_Qualified.xtpl	Webengagement_Qualified
WebEng_Rejected.xtpl	Webengagement_Rejected
WebEng_Timeout.xtpl	Webengagement_Timeout

Engagement Phase Templates

Web Engagement includes the following types of standard reporting templates for the engagement phase:

- Report templates on chat and web callback interactions triggered by the Web Engagement process and processed by an agent.
- Report templates for rule based reporting based on the data attached to chat and web callback interactions triggered by the Web Engagement process and processed by an agent.

Importing Genesys Web Engagement Sample Reporting Templates in CCPulse+

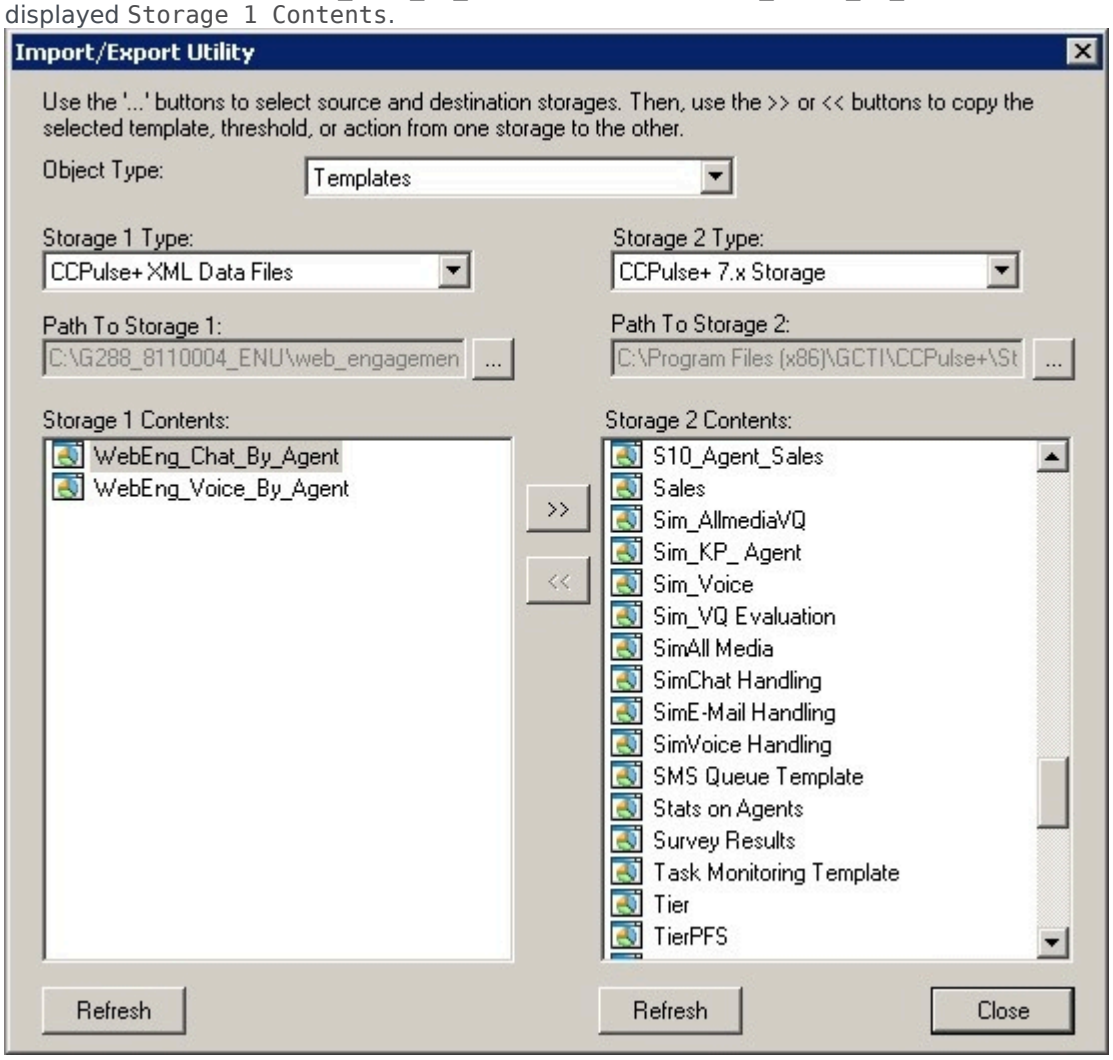
Note: For information about using CCPulse+, click `Help` in the CCPulse+ user interface or see the Reporting 8.0 CCPulse+ Administrator's Guide. The Web Engagement templates for CCPulse+ have an extension of `.xtpl`, which is an XML format. The documentation for CCPulse+ does not distinguish files by extension and refers to `.xtpl` files as XML files.

Prerequisites

- You have installed CCPulse+ version 8.0.000.36 (or later).
- You are a CCPulse+ administrator.

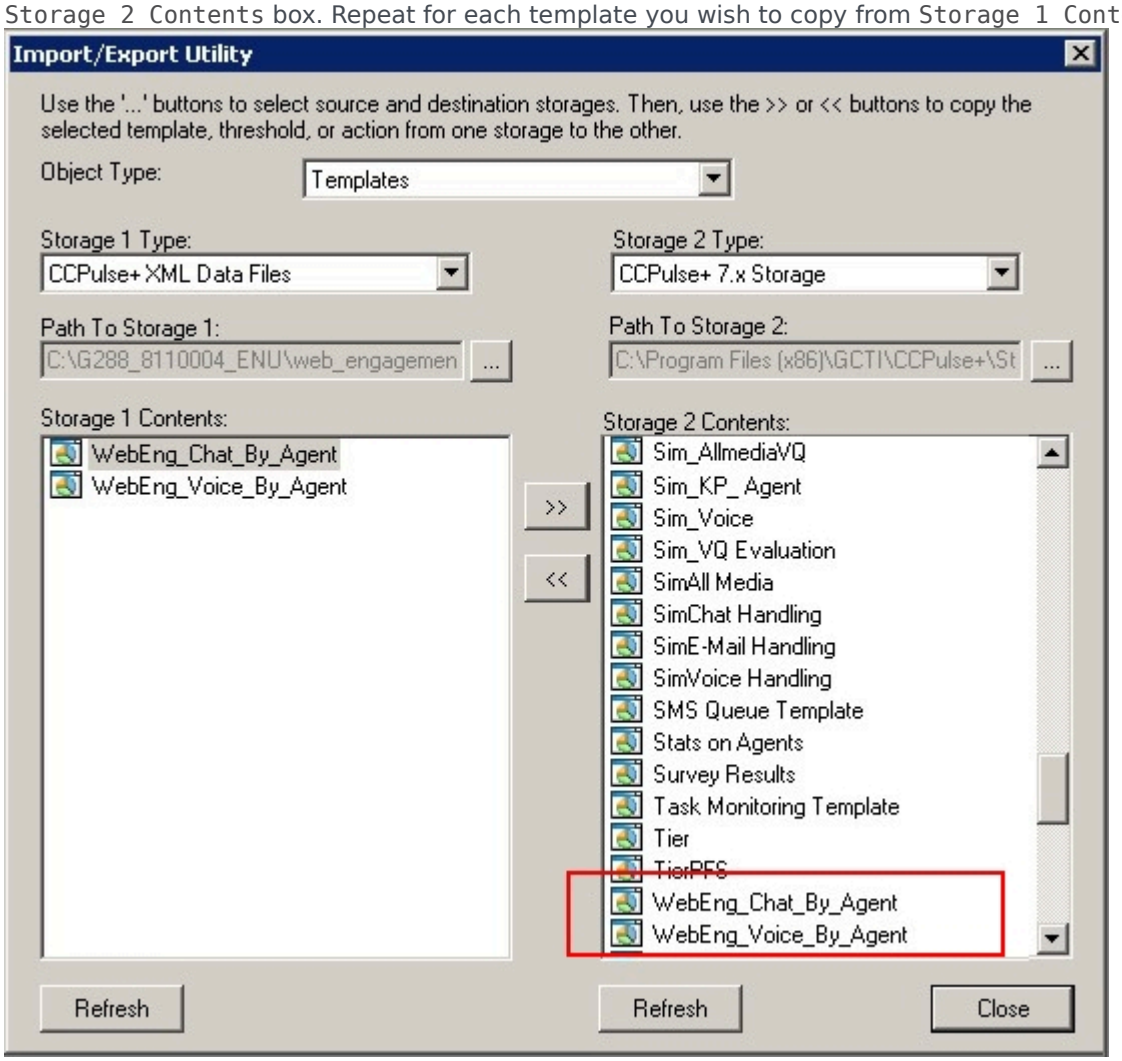
Start

1. Open CCPulse+ and navigate to `Tools > Import/Export`. The Import/Export Utility opens.
2. Select `Templates` for the Object Type.
3. Choose the import source.
   - For `Storage 1 Type`, select `CCPulse+ XML Data Files`.
   - For `Path To Storage 1`, click `...` and select the path to the reporting XML template(s) you wish to import. The Genesys Web Engagement Sample Reporting Templates are located in the `web_engagement_reporting_template` directory on your installation CD.
   - Click `Open`. The reporting templates are displayed in the `Storage 1 Contents` box below. For example, if you select the `Web Engagement Media Based` folder for `Path To Storage 1`, the reporting templates `WebEng_Chat_By_Agent.xtpl` and `WebEng_Voice_By_Agent.xtpl` are displayed `Storage 1 Contents`.



4. Choose the import destination.
   - Select `CCPulse+ 7.x Storage` for the `Storage 2 Type`.

- Select a template in `Storage 1 Contents` and click the >> button. The template is copied to the `Storage 2 Contents` box. Repeat for each template you wish to copy from `Storage 1 Contents`.



5. Repeat steps 3 and 4 for each template you would like to import into CCPulse+.
6. Click `Close`. The Import/Export Utility closes.

End