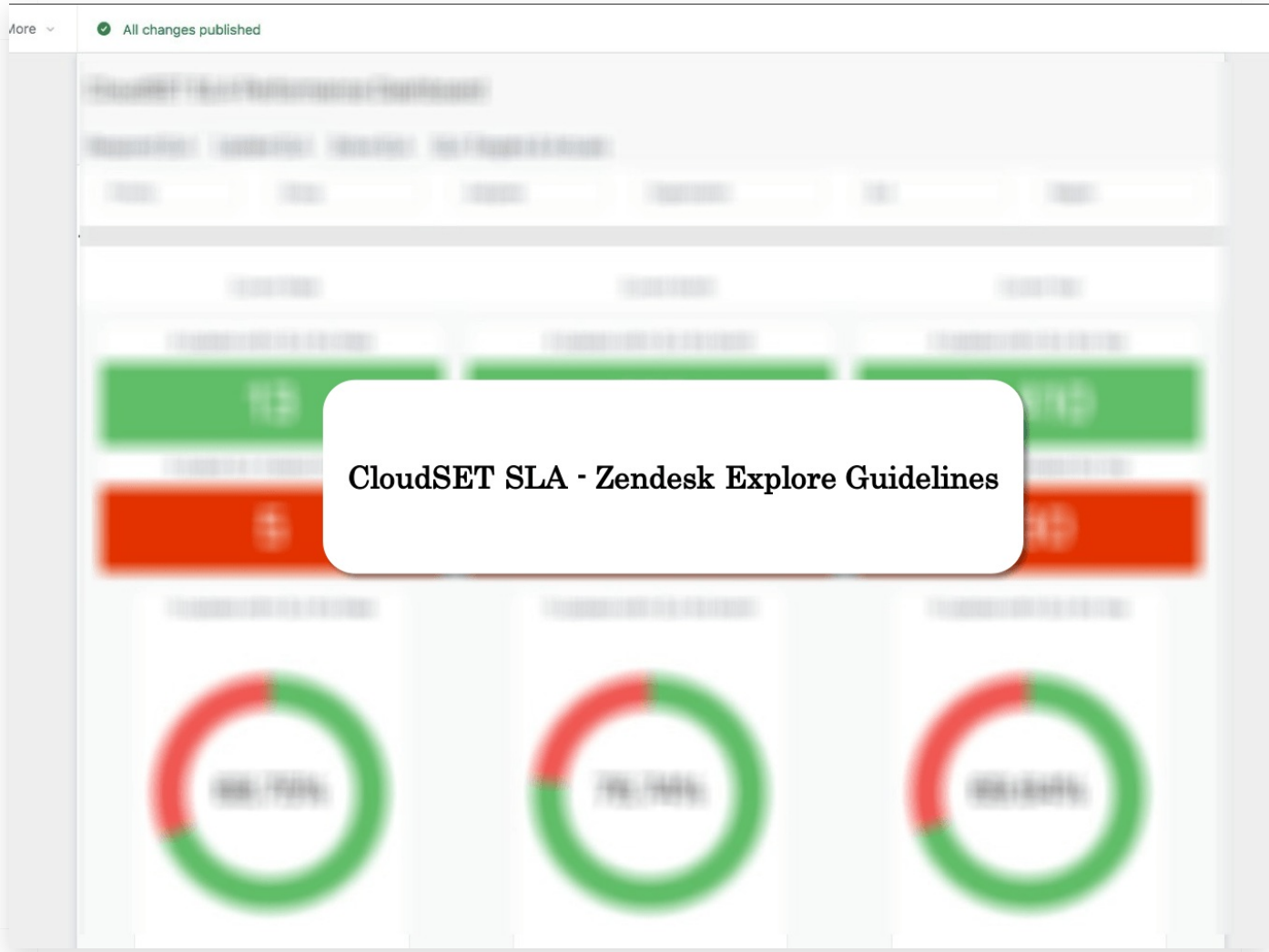
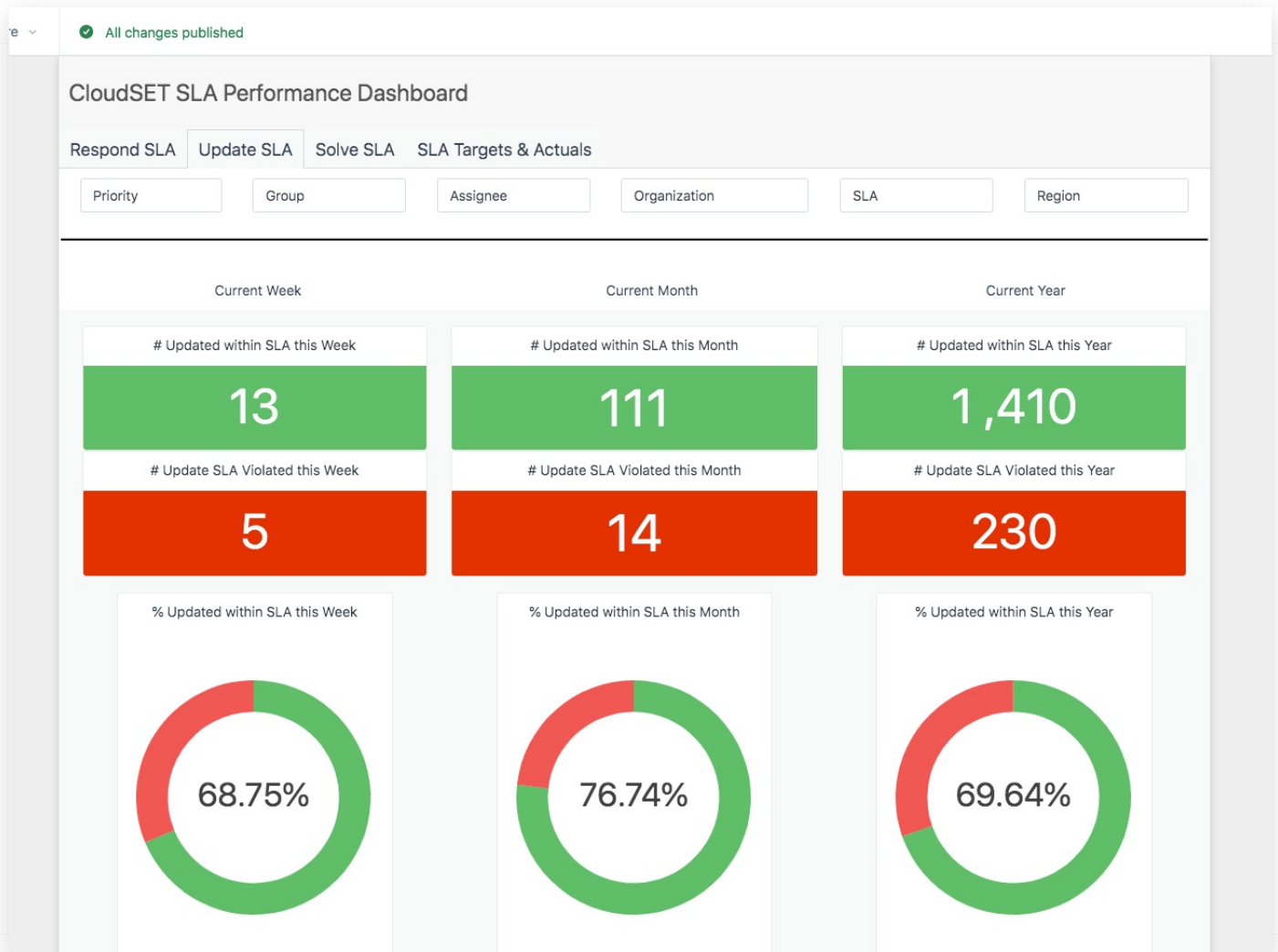


CloudSET SLA - Zendesk Explore Reports



The purpose of this short video, is to provide guidelines in the use of CloudSET SLA metrics, in your Zendesk Explore reports and dashboards



It is assumed that the audience already has some knowledge and training in the use of Zendesk Explore, but this video will guide you in the use of some of the available capabilities, that can be applied to build a simple SLA performance dashboard, using the metrics measured as part of your CloudSET SLA setup

Datasets

Datasets 7

All My datasets

Type to start searching...

Name	Last ref
Support: Tickets [default]	27 minu
Support: Ticket updates [default]	26 minu
Support: Backlog history [default]	26 minu
Zendesk Support - Overview Fixed	27 minu
CloudSET SLA Performance Data	27 minu
Support Ticket Events Connection 1	26 minu
Support Nps® Surveys	Invalid d

When building this example dashboard, we make use of queries based on the ticket updates dataset

Search icons and user profile in the top right corner.

[New dataset](#)

Search input field with a magnifying glass icon.

	Last refreshed ▾	Queries ▾
	27 minutes ago	53
[fault]	26 minutes ago	36
[fault]	26 minutes ago	New query from this...
/ Fixed	27 minutes ago	9
Data	27 minutes ago	1
ection 1	26 minutes ago	0
	Invalid date	0

Help button with a question mark icon.

Start by creating a new query based on this dataset

Queries library > New query

Dataset
Support: Ticket updates (default)

New query

Save

Metrics Add > Filters Add >


Columns Add >

Rows Add >

Explosions Add >

Calculations

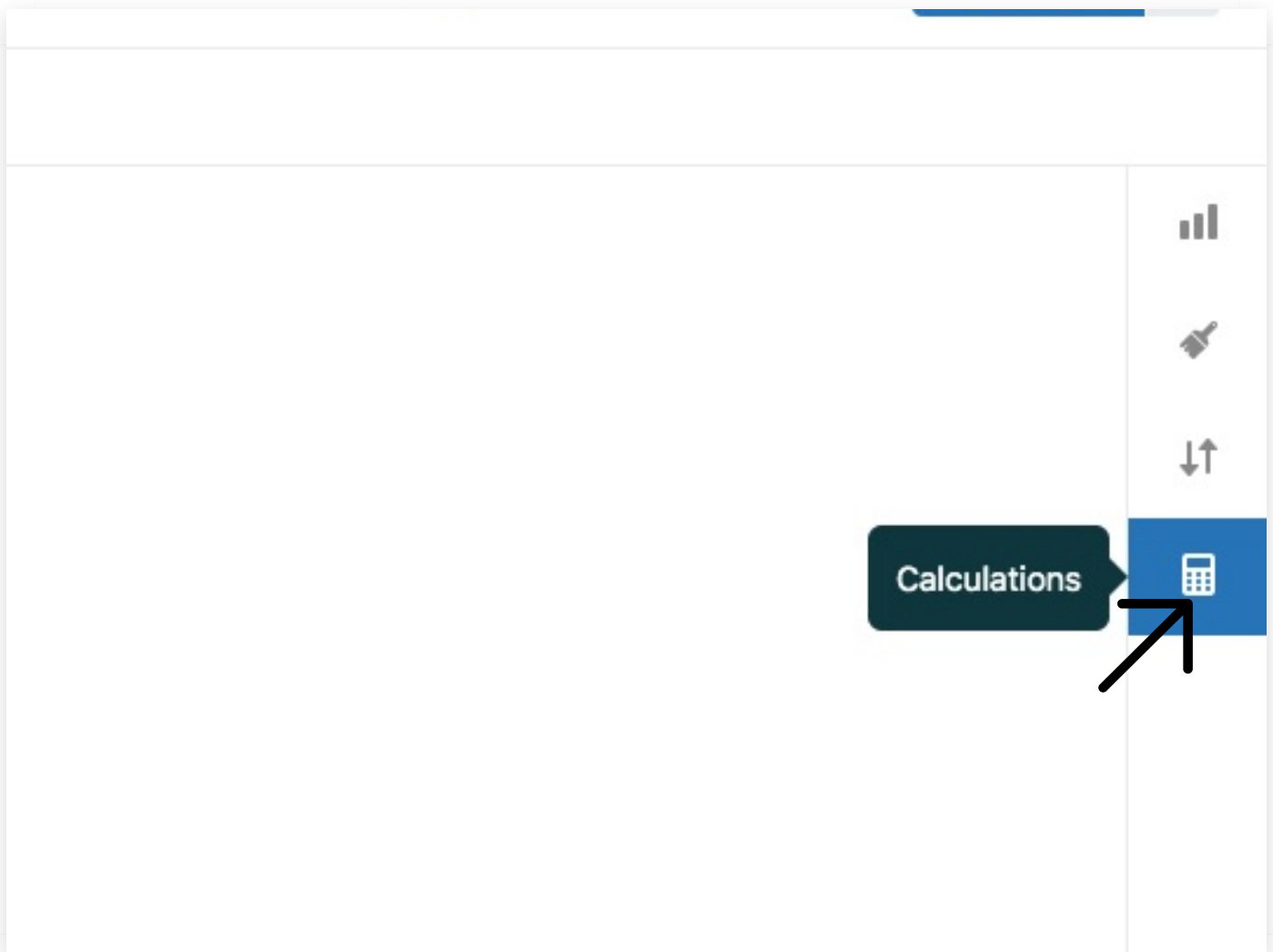
Help



Creating a query

1. Select metrics that you want to measure
2. Slice by attributes and add filters
3. Choose how you want to visualise the data
4. Save your query and add it to a dashboard

[Open an existing query](#)



From within the query definition page, it is possible to create new calculated attributes, and calculated metrics

Calculations

Metrics

- Standard calculated metric**
Type formulas to create new custom metrics
- Date range calculated metric**
Create metrics defined by a specified timeframe
- Time comparison calculated metric**
Create comparison metrics with a specified offset
- Fixed calculated metric**
Create constants for benchmarking and comparison

Attributes

- Standard calculated attribute**
Type formulas to create new custom attributes
- Group**
Create a group or groups of an attributes values
- Set**
Create a reusable list of attribute values

Creating a query

1. Select metrics th
2. Slice by attribut
3. Choose how you
4. Save your query

Open an existing

For each event measured in your CloudSET SLA setup, it will be necessary to create 2 calculated attributes

Standard calculated attribute

Options

Type formulas to create new custom attributes

Name

SLA Respond Passed

Formula **Format** ✓

```
1 IF ([Changes - Field name] = "SLA3 Respond Measure" AND
2 [Changes - New value] = "respond_passed" AND
3 [SLA3 Respond Measure] = "Passed") THEN
4 [Update ticket ID]
5 ENDIF
```

Fields

Select a field

Functions

Add

Computed from

None

Sort like time attribute ⓘ

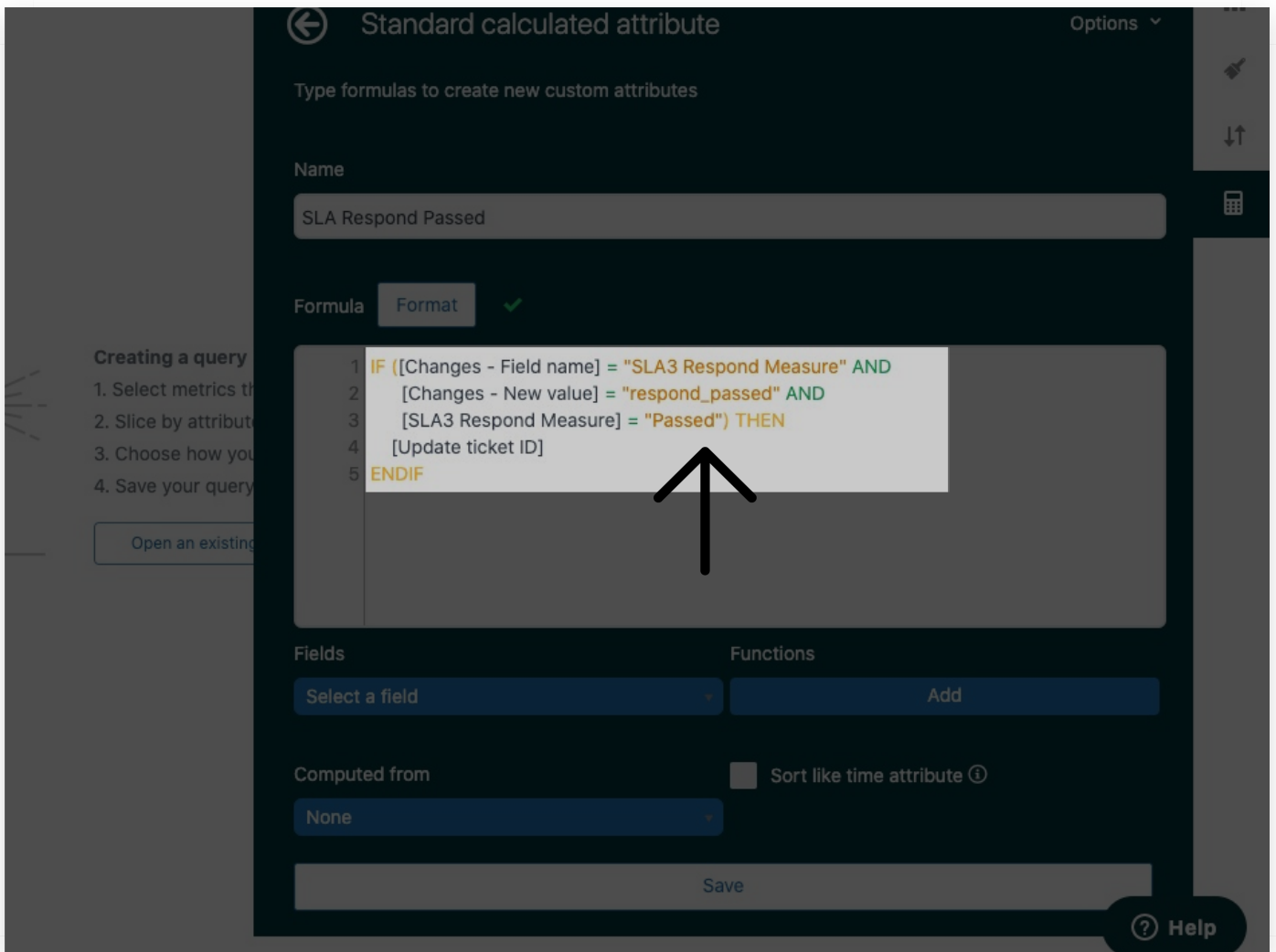
Save

Creating a query

1. Select metrics th
2. Slice by attribut
3. Choose how you
4. Save your query

Open an existing

In this example, the SLA setup measures the time taken to provide and initial response, using the respond timer. So a calculated attribute is required, to identify if and when the initial response was given within the SLA (i.e., respond passed)



This is achieved by checking to see if the SLA respond measure field, has been changed with a value set to respond_passed, and the current SLA measurement is also passed If so, the calculated attribute is set with the value of the ID for the ticket involved in the update

Standard calculated attribute Options ▾

Type formulas to create new custom attributes

Name

SLA Respond Violated

Formula Format ✓

```
1 IF ([Changes - Field name] = "SLA3 Respond Measure" AND
2 [Changes - New value] = "respond_violated") AND
3 [SLA3 Respond Measure] = "Violated" THEN
4 [Update ticket ID]
5 ENDIF
```

Fields Functions

Select a field Add

Computed from Sort like time attribute ⓘ

None

Save

A second calculated attribute is required, to identify if an initial response has not been provided for the ticket, within the SLA (i.e., respond violated)

Calculations

Metrics

- Standard calculated metric**
Type formulas to create new custom metrics
- Date range calculated metric**
Create metrics defined by a specified timeframe
- Time comparison calculated metric**
Create comparison metrics with a specified offset
- Fixed calculated metric**
Create constants for benchmarking and comparison

Attributes

- Standard calculated attribute**
Type formulas to create new custom attributes
- Group**
Create a group or groups of an attributes values
- Set**
Create a reusable list of attribute values
- Ordered set**

Creating a query

1. Select metrics th
2. Slice by attribut
3. Choose how you
4. Save your query

[Open an existing](#)

Once created, the calculated attributes will be available for use when creating the calculated metrics, required in the queries involved in the example dashboard

Standard calculated metric

Type formulas to create new custom metrics

Name

SLA Respond Passed

Formula **Format** ✓

```
1 IF (COUNT_VALUES([SLA Respond Passed]) > 0) THEN
2 1
3 ELSE
4 0
5 ENDIF
```

Locate the Calculated Attributes in the list of Fields available to the formula

Fields **Select a field** Functions **Add**

Compute separately ⓘ

Save

Creating a query

1. Select metrics to
2. Slice by attribut
3. Choose how you
4. Save your query

Open an existing

A calculated metric is required for each of the 3 types of query used in the example dashboard, the first of which is used to query the number of tickets that have provided an initial response within the SLA (i.e., respond passed)

Standard calculated metric

Type formulas to create new custom metrics

Name

SLA Respond Passed

Formula **Format** ✓

```
1 IF (COUNT_VALUES([SLA Respond Passed]) > 0) THEN
2   1
3 ELSE
4   0
5 ENDIF
```

Fields: Select a field

Functions: Add

Compute separately ⓘ

Save

This is achieved, by counting the number of instances in which a value has been set in the calculated attribute, used to identify when the initial response was given within the SLA (i.e., passed) It's important to ensure the presence of the SLA pass event is counted only once, since it's possible more than one event could appear in the history of the ticket, due to a change in priority or SLA Policy

Standard calculated metric

Type formulas to create new custom metrics

Name

SLA Respond Violated

Formula **Format** ✓

```
1 IF (COUNT_VALUES([SLA Respond Violated]) > 0) THEN
2   1
3 ELSE
4   0
5 ENDIF
```

Fields **Functions**

Select a field Add

Compute separately ⓘ

Save

A second metric is required to count the number of instances in which a value has been set in the calculated attribute, used to identify when the initial response was not given within the SLA (i.e., violated)

Standard calculated metric

Type formulas to create new custom metrics

Name: # SLA Respond Measured

Formula: `SUM(# SLA Respond Passed) + SUM(# SLA Respond Violated)`

Fields: Select a field

Functions: Add

Compute separately

Save

Creating a query

1. Select metrics th
2. Slice by attribut
3. Choose how you
4. Save your query

Open an existing

Locate the Calculated Metrics in the list of Fields for use in the formula

A third metric is required, to sum together the total number of SLA passes and SLA violations, calculated in the previous two metrics

Standard calculated metric

Options

Type formulas to create new custom metrics

Name

% Responded within SLA

Formula

Format

1 SUM(# SLA Respond Passed) / SUM(# SLA Respond Measured)

Locate the Calculated Metrics in the list of Fields for use in the formula

Fields

Select a field

Functions

Add

Compute separately

Save

The final metric is required to calculate the percentage of tickets where an initial response has been given within the SLA, dividing the number of SLA passes, by the total number of SLA respond measurements taken

The screenshot shows a dashboard configuration interface. At the top, the breadcrumb is "Queries library > # Respond within SLA this Week". Below this, the "Dataset" is "Support: Ticket updates [default]". The main title of the dashboard is "# Respond within SLA this Week".

The "Metrics" section is currently empty, with an "Add >" button. A mouse cursor is clicking on this button, which has opened a dropdown menu. The dropdown menu is titled "Metrics" and contains the following items:

- A search bar.
- A section header "Calculated metrics" with a downward arrow.
- A list of calculated metrics:
 - "# SLA Respond Passed" (with a pencil icon and a downward arrow)
 - "SUM" (highlighted in blue, with a checkmark icon)
 - "AVG"
 - "COUNT"
 - "MIN"
 - "MAX"
 - "D_COUNT"
 - "MED"

On the left side of the dashboard, there are sections for "Columns" and "Rows", each with an "Add >" button. A "Filters" section is also visible with an "Add >" button and a filter button labeled "Update - Week ... x".

It is now possible to start defining the queries involved in the example dashboard, by adding the appropriate calculated metric from the list

Queries library > # Respond within SLA this Week

Dataset
Support: Ticket updates [default]

Respond within SLA this Week

Metrics Add > Filters Add > Update - Week ... x

SUM(# SLA Respond Passed) x

Metrics
A metric is a numeric value that you want to measure, like number of tickets.

Search

Calculated metrics

SLA Respond Passed

SUM

AVG

COUNT

MIN

MAX

D_COUNT

MED

Columns Add >

Rows Add >

The first query in this example will report the number of tickets for which an initial response has been given within the SLA, by summing the number SLA Respond Passed metric

Dataset
Support: Ticket updates [default]

Respond within SLA this Week

Metrics [Add >](#)

Filters [Add >](#) Update - Week ... x

SUM(# SLA Respond Passed) x

Metrics

A metric is a numeric value that you want to measure, like number of tickets.

Search

Calculated metrics

SLA Respond Passed

SUM

AVG

COUNT

MIN

MAX

D_COUNT

MED

VARIANCE

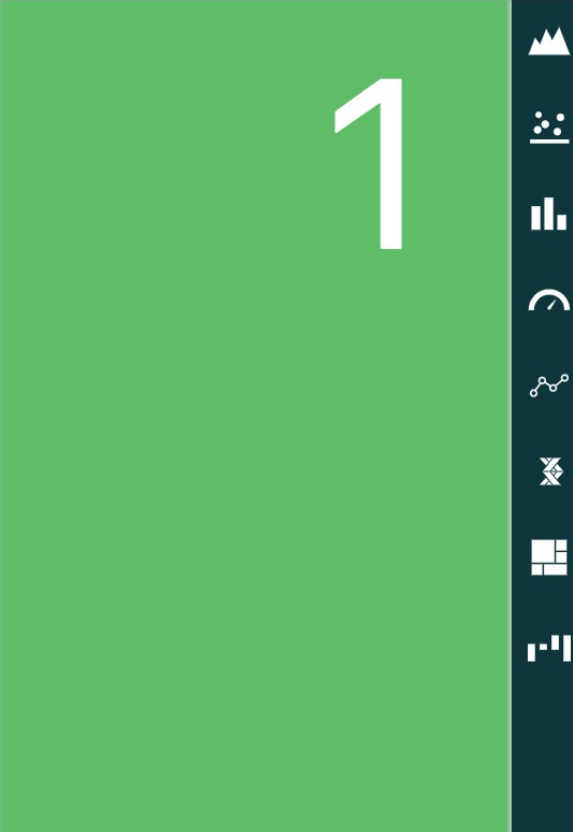
STD_DEV

% Responded within SLA

SLA Respond Measured

SLA Respond Violated

Apply

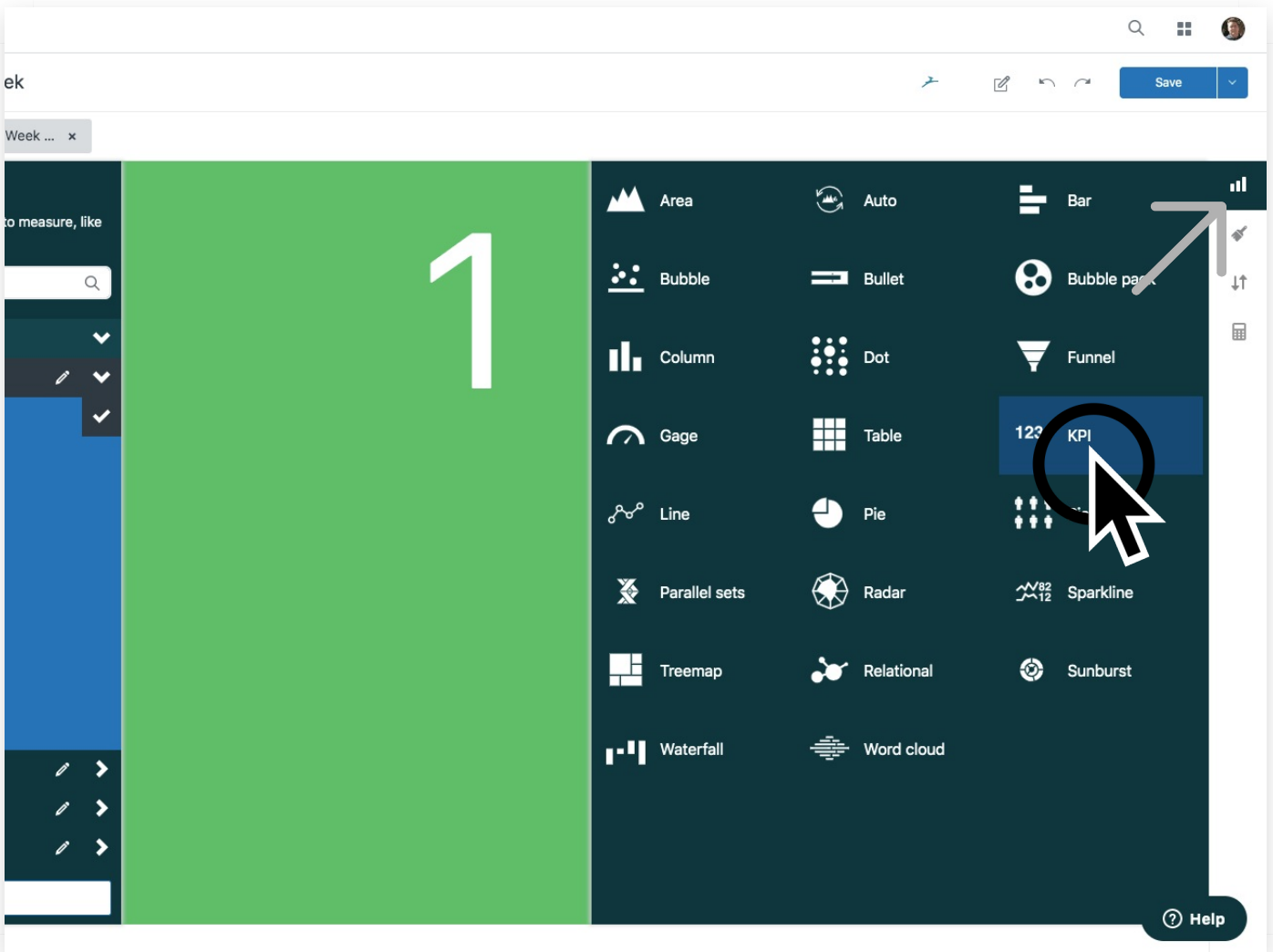


Columns [Add >](#)

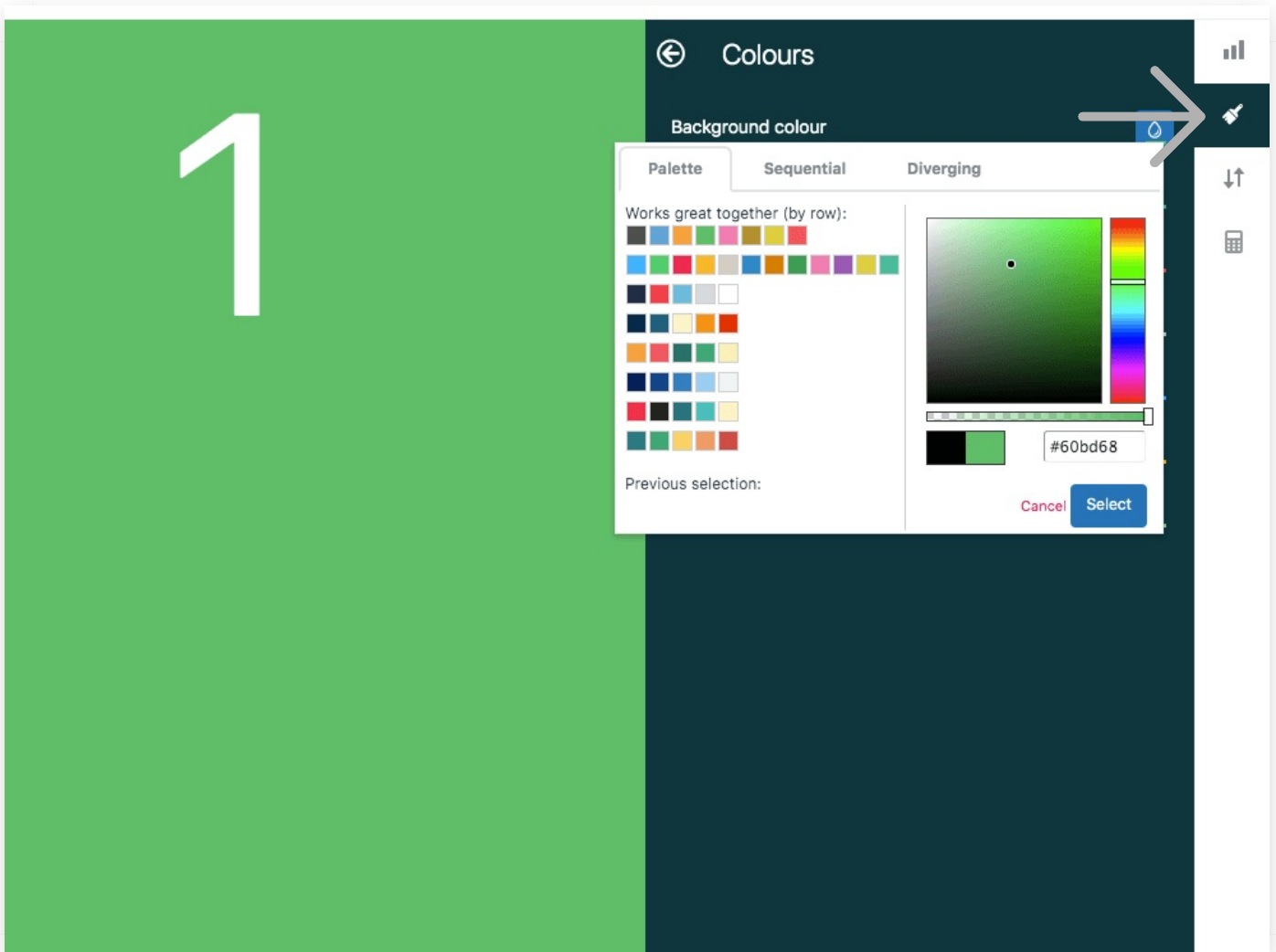
Rows [Add >](#)

Explosions [Add >](#)

Columns: 1 Rows: 1



The visualisation type for this query, should be set as KPI



Set the background colour for the query, and make any other required configurations

The screenshot shows a Power BI query editor interface. The main title is "# Respond within SLA this Week". The dataset is "Support: Ticket updates [default]". The metric is "SUM(# SLA Respond Passed)". The filters pane is open, showing a search for "week" and a list of filter options. The "Update - Week of year" filter is selected. A large green arrow points to the "Apply" button at the bottom of the filters pane.

In this example dashboard, the SLA performance is reported in the current week, month and year. So, in order to achieve this, a separate query is required for each period, using a filter based on the date the update occurred

Queries library > # Respond within SLA this Week

Dataset
Support: Ticket updates [default]

Metrics [Add >](#) Filters [Add >](#) Update - Week ... x

SUM(# SLA Respond Passed) x

Columns [Add >](#)

Rows [Add >](#)

Explosions [Add >](#)

Filters

week

Time - Ticket update

Update - Week of year

Update - Day of week

Time - Ticket created

Ticket created - Week of year

Ticket created - Day of week

Time - Ticket solved

Ticket solved - Week of year

Ticket solved - Day of week

Time - Ticket last updated

Ticket updated - Week of year

Ticket updated - Day of week

Time - Ticket last assigned

Ticket assigned - Week of year

Ticket assigned - Day of week

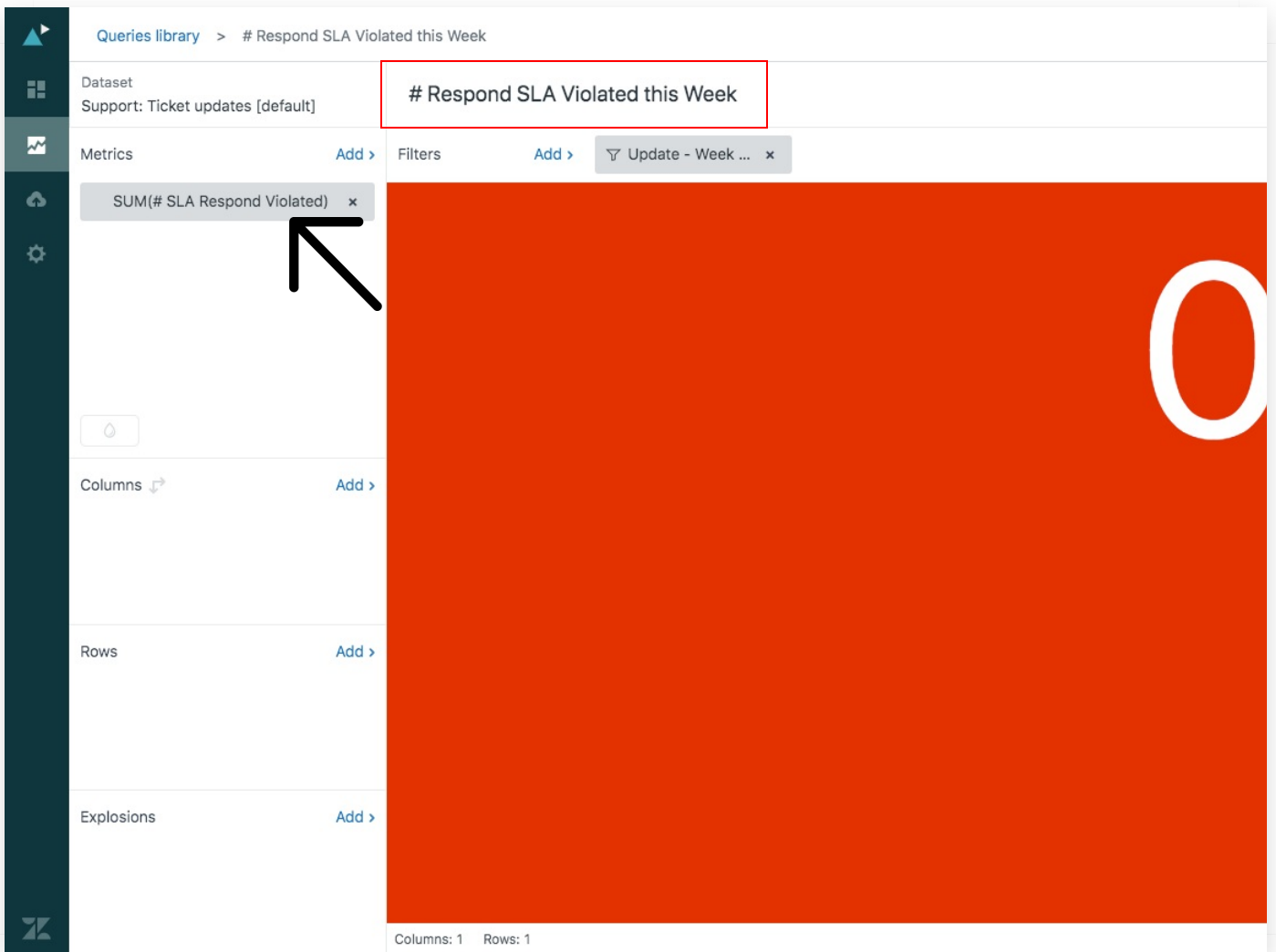
Apply

Columns: 1 Rows: 1

Add a filter using the Update - Week of year attribute

The screenshot shows the Zendesk Cloudset interface. The main query is '# Respond within SLA this Week'. The dataset is 'Support: Ticket updates [default]'. The metric is 'SUM(# SLA Respond Passed)'. The filter is 'Update - Week of year'. The 'Date range' dropdown is open, and 'This week' is selected. An arrow points to the filter name, and a red box highlights the 'Edit date ranges' button.

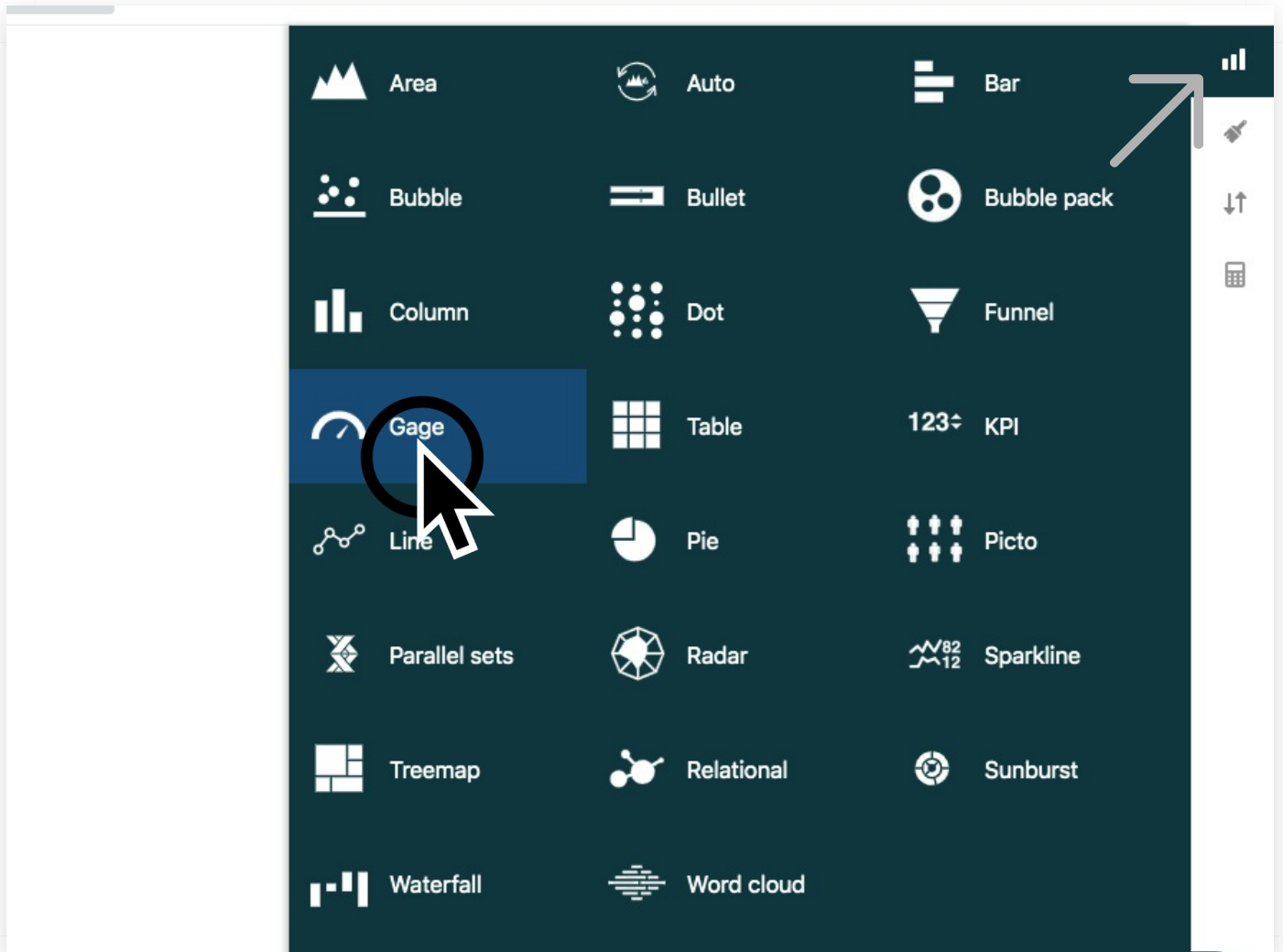
Then select the created filter, and choose this week, from the available date ranges



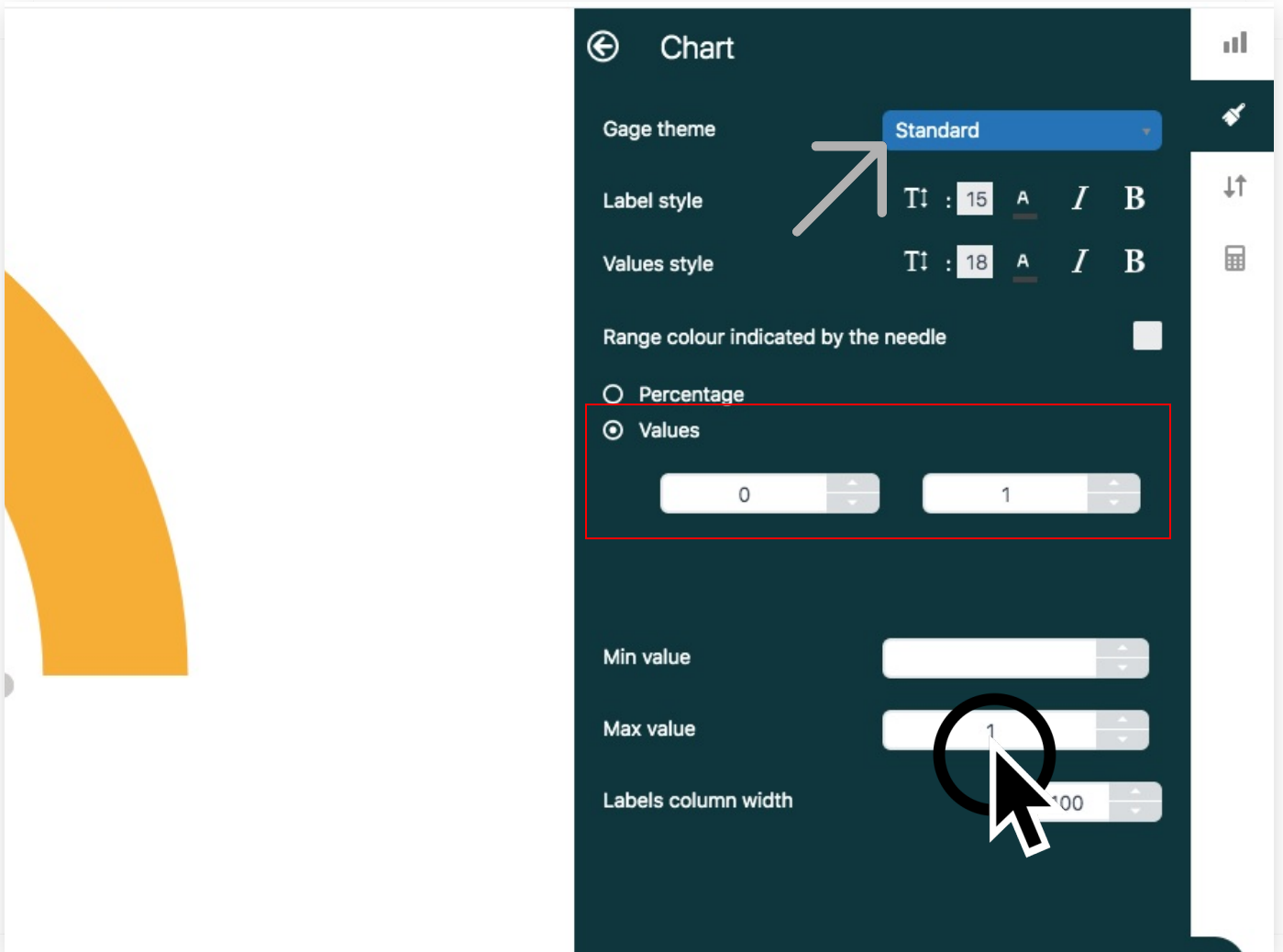
Create a second KPI query, using the number of SLA Respond Violated metric

The screenshot shows a data visualization tool interface. At the top, the breadcrumb is "Queries library > % Respond within SLA this Week". The main area is divided into several sections: "Dataset" (Support: Ticket updates [default]), "Metrics" (AVG(% Responded within SLA)), "Filters" (Update - Week, Changes - Field, Changes - New), and a central configuration panel for the metric "% Responded within SLA". This panel lists aggregation functions: SUM, AVG (selected), COUNT, MAX, D_COUNT, MED, VARIANCE, and STD_DEV. A mouse cursor is pointing at the "AVG" option. To the right, a large green donut chart is partially visible, showing "0%". At the bottom of the configuration panel, there are "Normal" and "Tooltip" buttons, and an "Apply" button. The status bar at the bottom indicates "Columns: 1 Rows: 1".

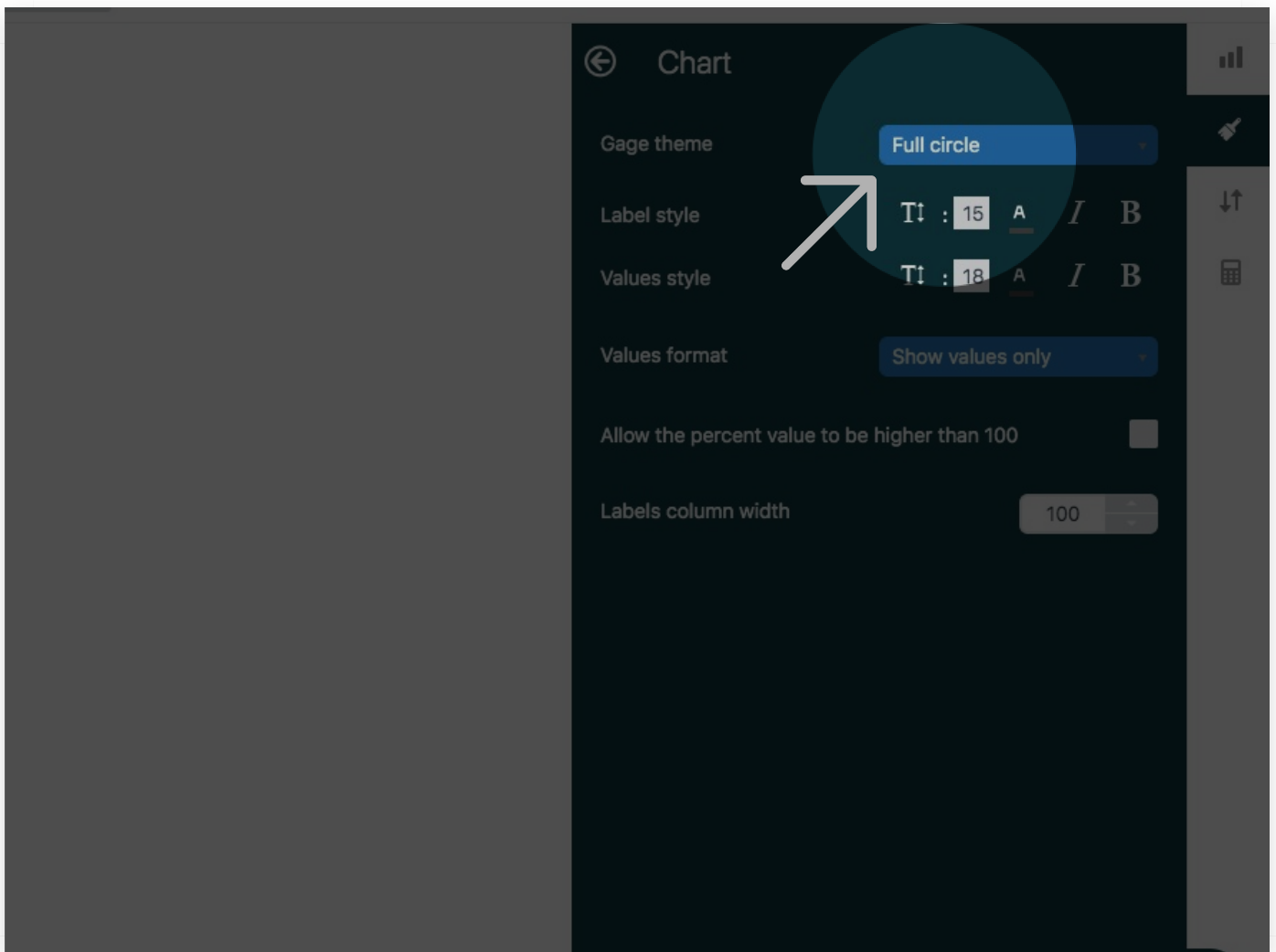
A third query is required, to report on the percentage of initial responds given within the SLA. This is achieved, by averaging the results of the % Responded within SLA metric



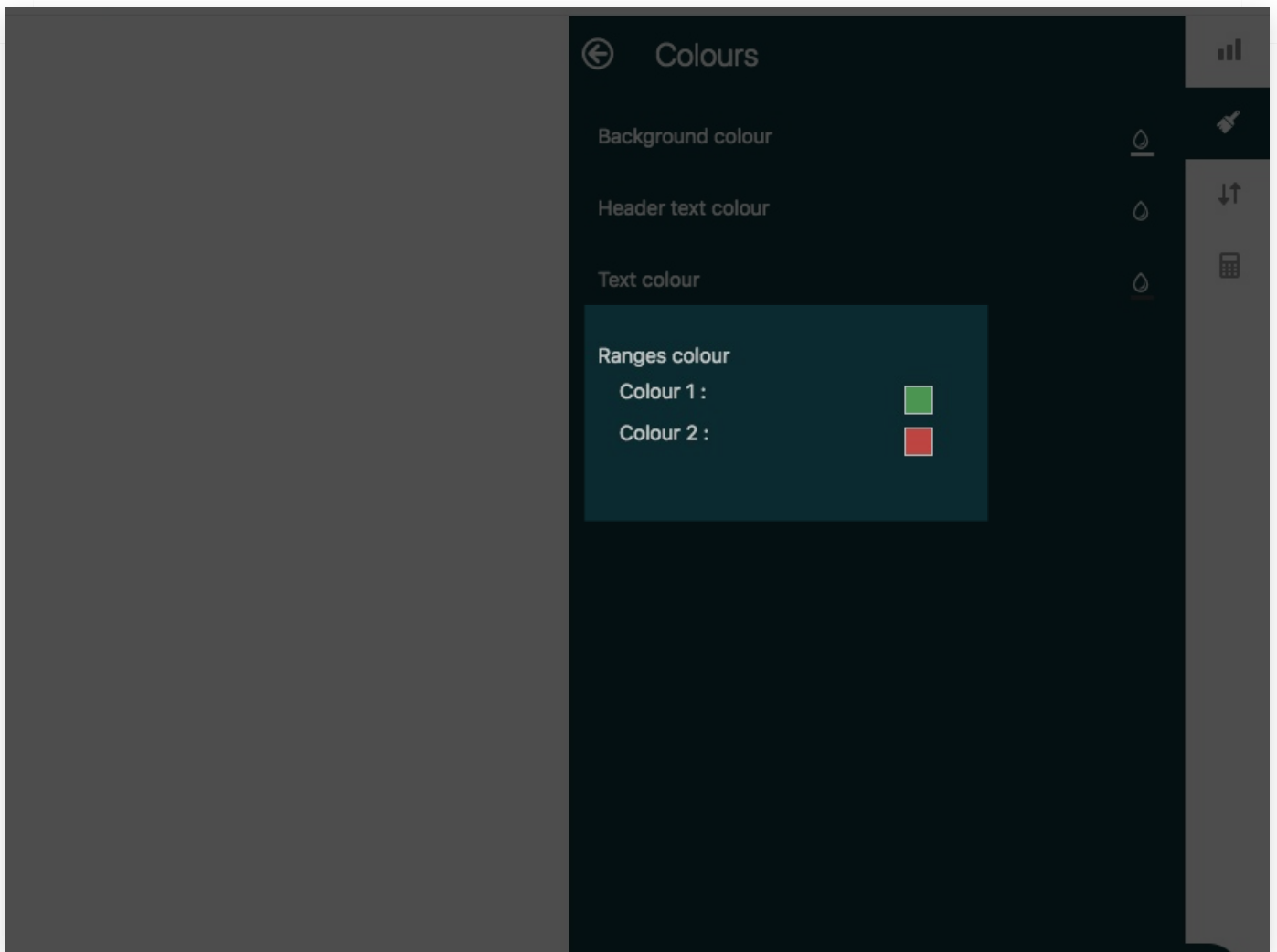
The visualisation type for this query, should be set to gauge



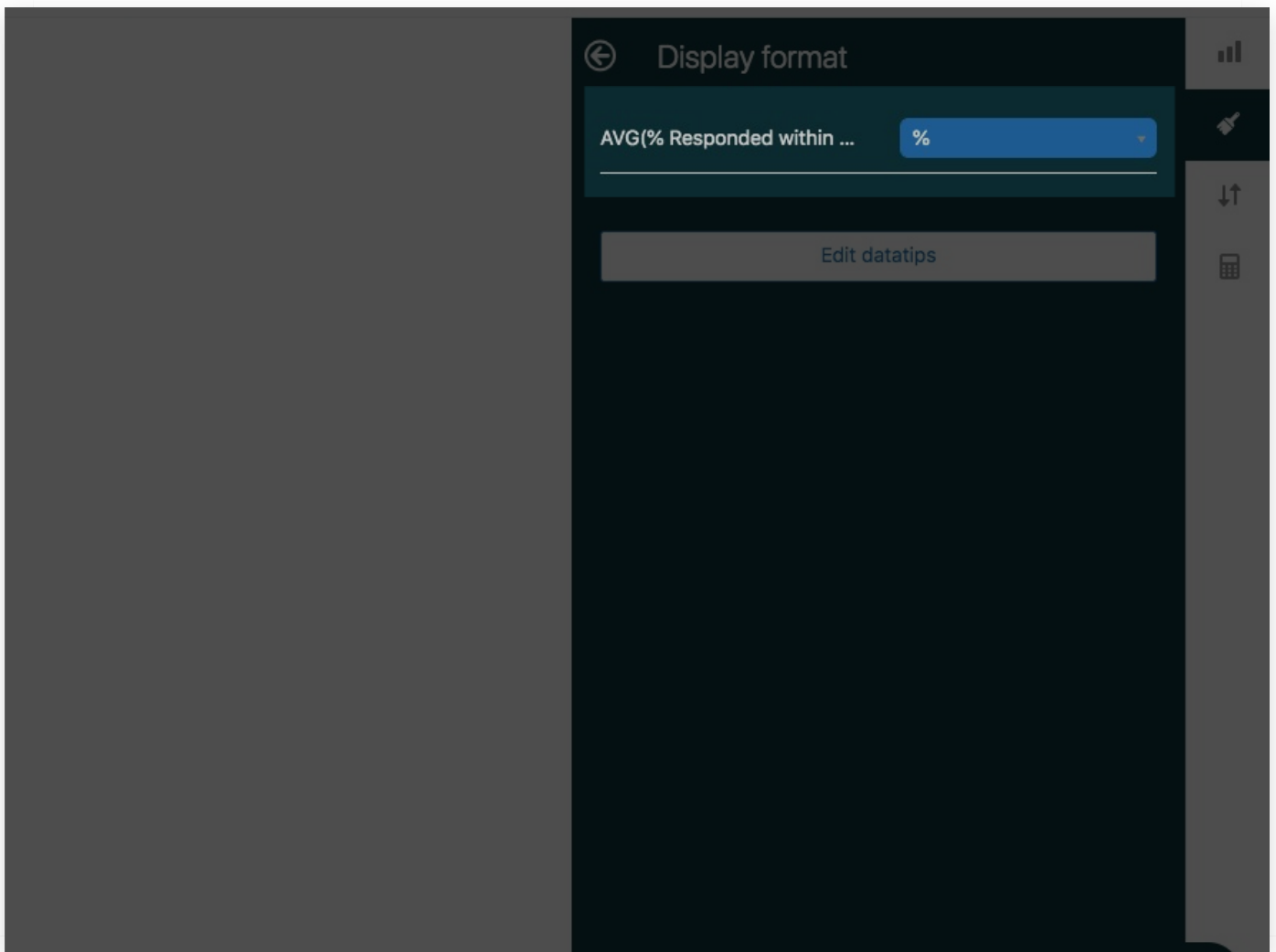
With the Gage theme set to Standard in the chart settings, ensure the Values are set as zero and 1, and the max value is set to 1



Then change the guage theme, to full circle



Set the range colours to green and red, representing passed and violated SLA measurements



and set the display format to %

Queries 104

New query

All My queries

Type to start searching...

Name	Dataset	Last updated	Visualisation type
# Respond within SLA this Week	Support: Ticket updates [default]	6 days ago, me	Auto
% Respond within SLA this Week	Support: Ticket updates [default]	6 days ago, me	Gage
% Respond within SLA this Month	Support: Ticket updates [default]	6 days ago, me	Gage
% Respond within SLA this Year	Support: Ticket updates [default]	6 days ago, me	Gage
# Respond SLA Violated this Week	Support: Ticket updates [default]	6 days ago, me	Auto
# Respond SLA Violated this Month	Support: Ticket updates [default]	6 days ago, me	Auto
# Respond SLA Violated this Year	Support: Ticket updates [default]	6 days ago, me	Auto
# Respond within SLA this Month	Support: Ticket updates [default]	6 days ago, me	Auto
# Respond within SLA this Year	Support: Ticket updates [default]	6 days ago, me	Auto
Satisfaction: Bad to good ratings [defa...	Support: Ticket updates [default]	14 days ago	KPI
Agent updates: Public comments [defa...	Support: Ticket updates [default]	14 days ago	KPI
Agent updates: Internal comments [def...	Support: Ticket updates [default]	14 days ago	KPI
Agent updates: Tickets commented, cr...	Support: Ticket updates [default]	14 days ago	Line

Help

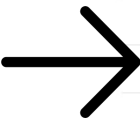
Queries library

Queries 104

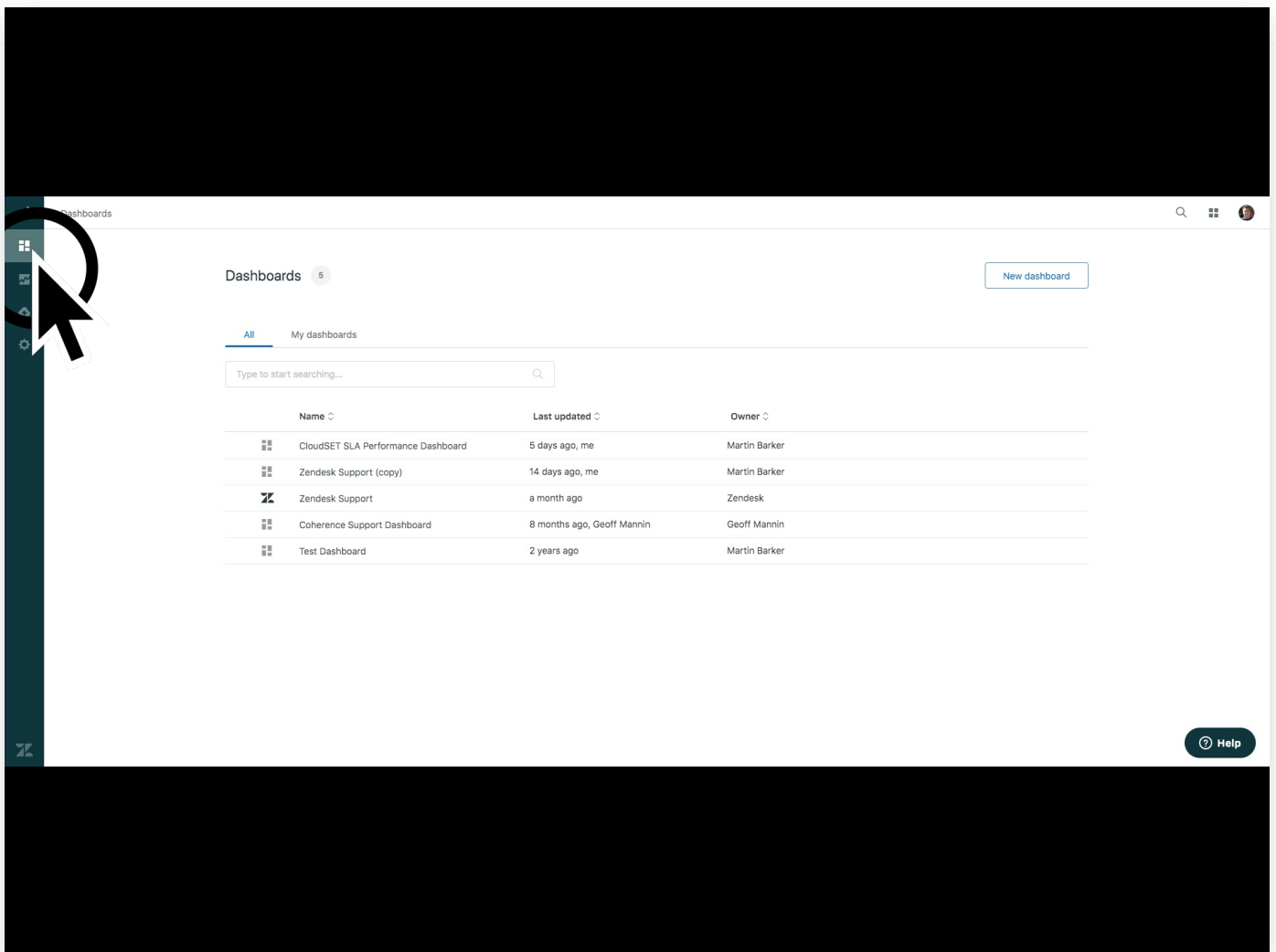
All My queries

Type to start searching...

Name	Dataset	Last updated
# Respond within SLA this Week	Support: Ticket updates [default]	6 days ago, m
% Respond within SLA this Week	Support: Ticket updates [default]	6 days ago, m
% Respond within SLA this Month	Support: Ticket updates [default]	6 days ago, m
% Respond within SLA this Year	Support: Ticket updates [default]	6 days ago, m
# Respond SLA Violated this Week	Support: Ticket updates [default]	6 days ago, m
# Respond SLA Violated this Month	Support: Ticket updates [default]	6 days ago, m
# Respond SLA Violated this Year	Support: Ticket updates [default]	6 days ago, m
# Respond within SLA this Month	Support: Ticket updates [default]	6 days ago, m
# Respond within SLA this Year	Support: Ticket updates [default]	6 days ago, m
Satisfaction: Bad to good ratings [defa...	Support: Ticket updates [default]	14 days ago
Agent updates: Public comments [defa...	Support: Ticket updates [default]	14 days ago
Agent updates: Internal comments [def...	Support: Ticket updates [default]	14 days ago
Agent updates: Tickets commented, cr...	Support: Ticket updates [default]	14 days ago



Clone the three queries and adjust the filters, to create corresponding queries for the current month and current year



The queries are now ready for inclusion within the example dashboard

The screenshot shows a user interface for managing dashboards. At the top right, there are icons for search, a grid, and a user profile. Below this is a large white area with a blue button labeled "New dashboard". A black arrow points upwards to this button. Below the button is a search bar with a magnifying glass icon. Underneath the search bar is a table with two columns: "Last updated" and "Owner". The table contains five rows of data. At the bottom right of the interface is a dark blue button with a question mark icon and the text "Help".

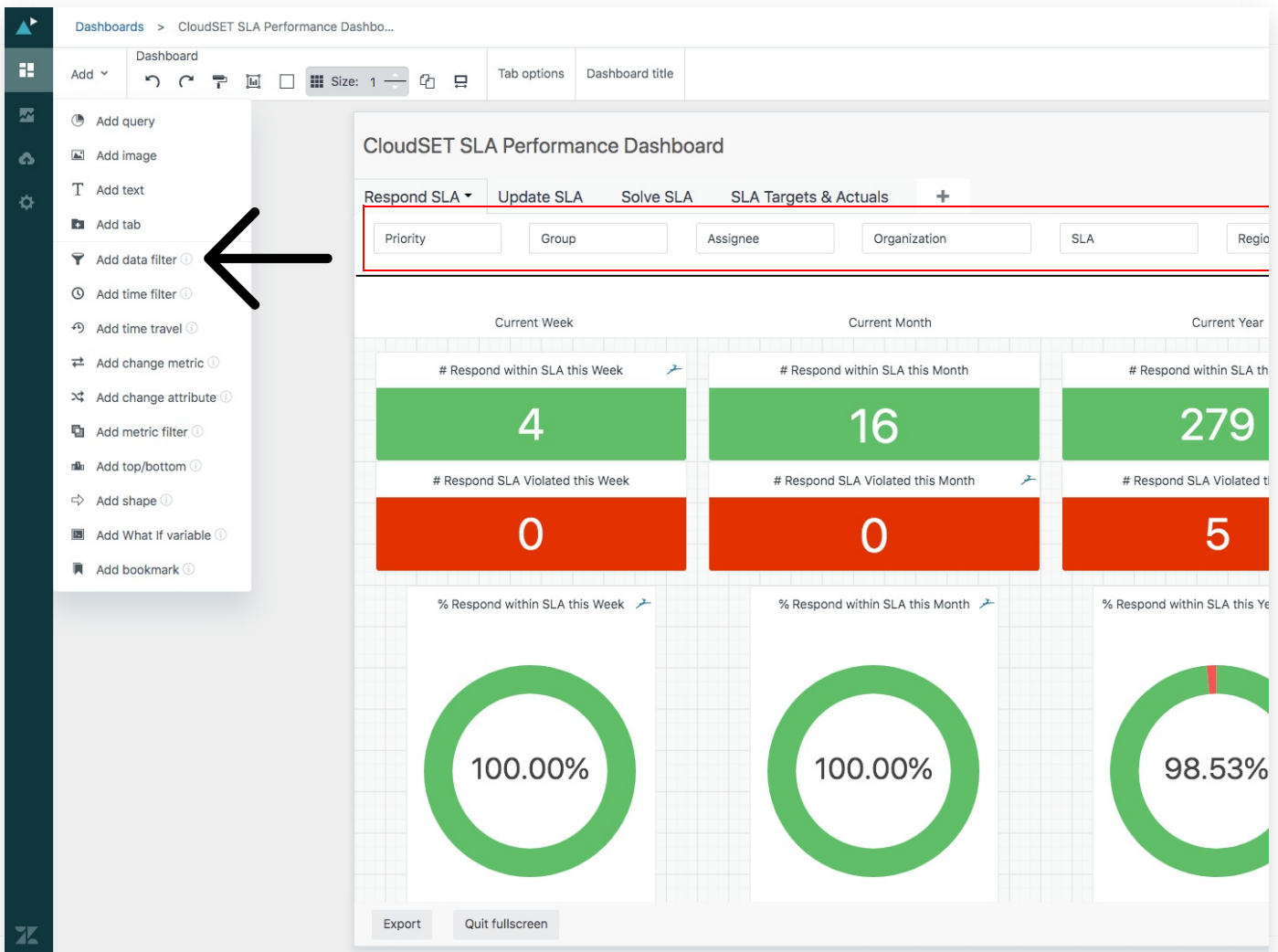
Last updated	Owner
5 days ago, me	Martin Barker
14 days ago, me	Martin Barker
a month ago	Zendesk
8 months ago, Geoff Mannin	Geoff Mannin
2 years ago	Martin Barker

Select the option to add a new dashboard

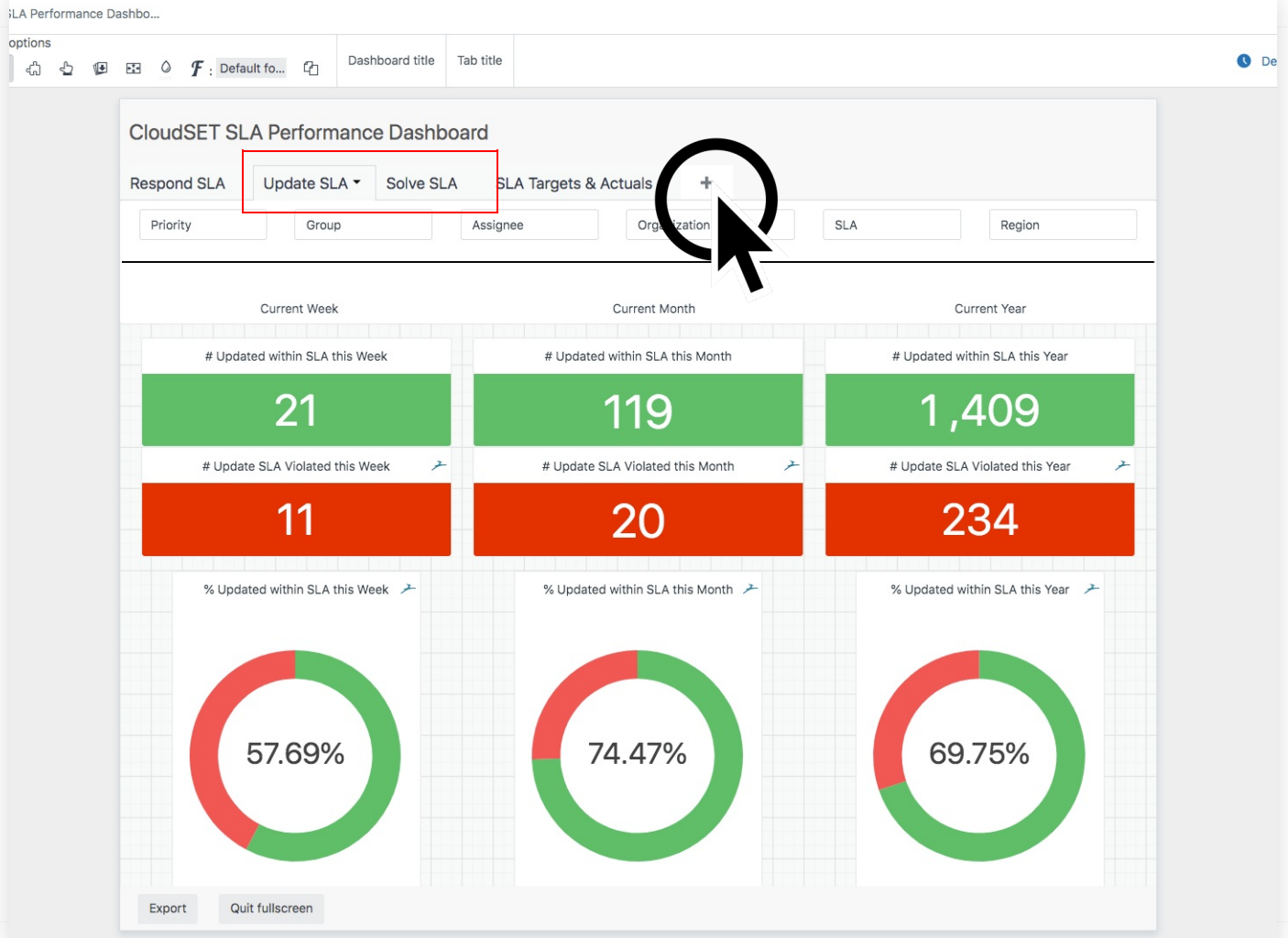
The screenshot shows a Power BI dashboard interface. On the left, a vertical menu is open with the 'Add query' option highlighted by a black arrow. The dashboard itself displays performance metrics for SLA (Service Level Agreement) across three time periods: Current Week, Current Month, and Current Year. The metrics are presented in two rows: counts of responses within and violated SLA, and donut charts showing the percentage of responses within SLA.

Metric	Current Week	Current Month	Current Year
# Respond within SLA	4	16	279
# Respond SLA Violated	0	0	5
% Respond within SLA	100.00%	100.00%	98.53%

Locate and add each of the queries, resize and position them on the dashboard

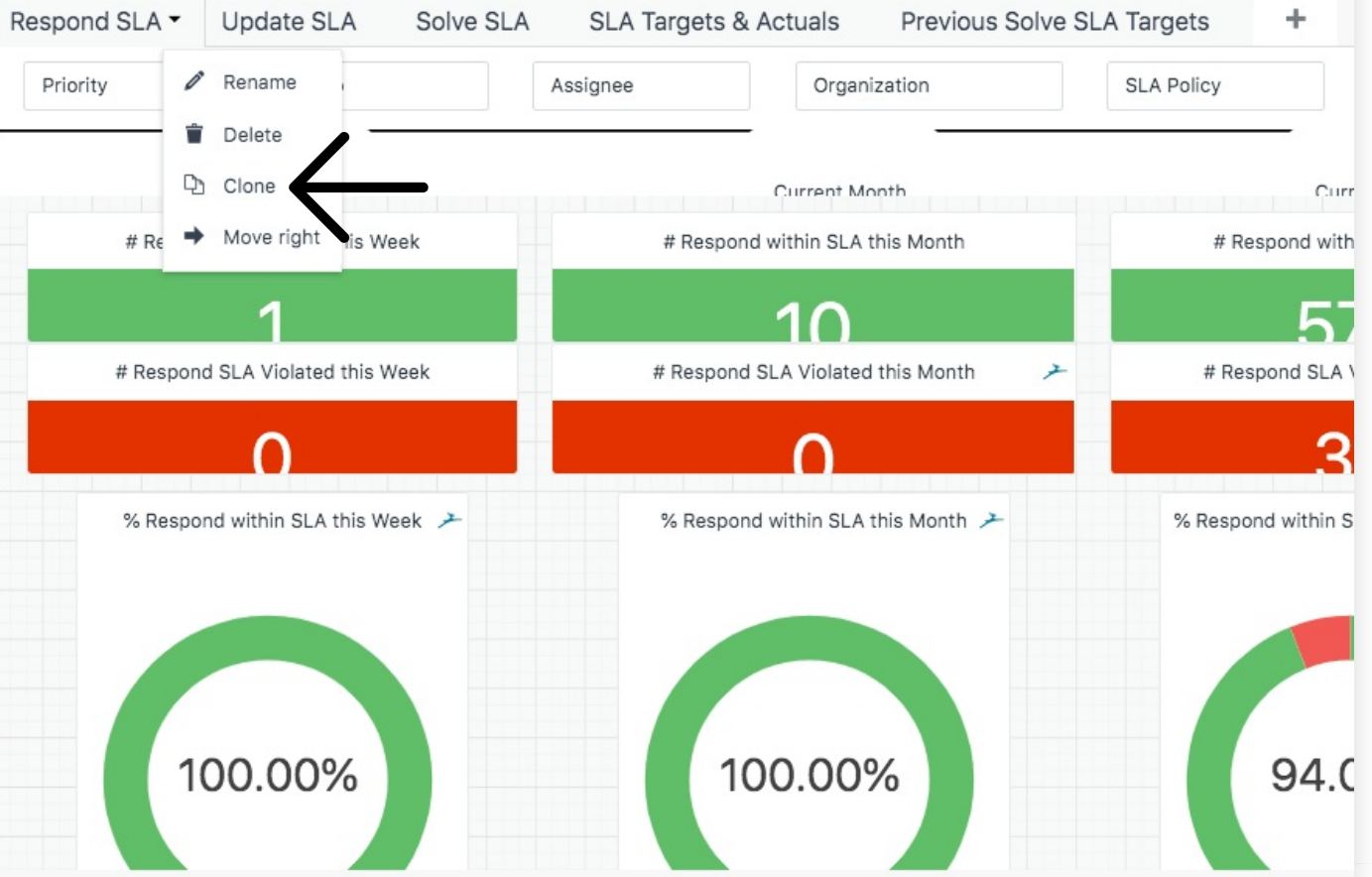


If required, add filters to the dashboard, to refine the results based on alternative classifications, assignees, groups, customers, etc.



Now clone each of the calculated attributes, calculated metrics, and queries, for each of the events measured as part of your SLA setup, and introduce to the example dashboard in tabs

CloudSET SLA Performance Dashboard



It can be useful to clone an existing tab, to inherit the headings, labels, filters, and any other reusable components

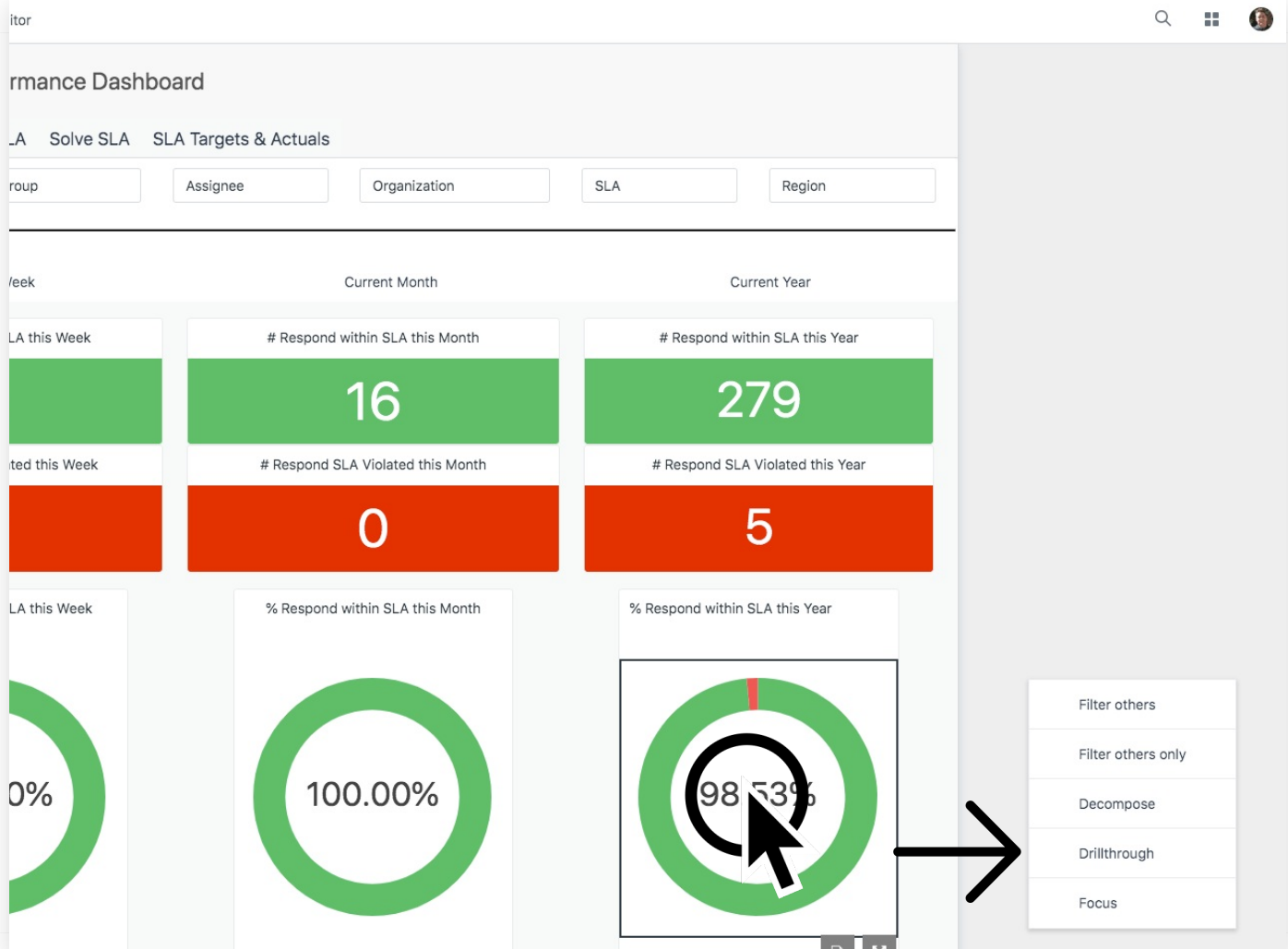
CloudSET SLA Performance Dashboard

Respond SLA Update SLA Solve SLA SLA Targets & Actuals

Priority Group Assignee Organization SLA Region



- Filter others
- Filter others only
- Decompose
- Drillthrough
- Focus



For certain visualisation types such as the gauge, it is possible to drillthrough into the data used in the query, by clicking on the headline value

Unpublished changes in editor

CloudSET SLA Performance Dashboard

Respond SLA | Update SLA | Solve SLA | SLA Targets & Actuals

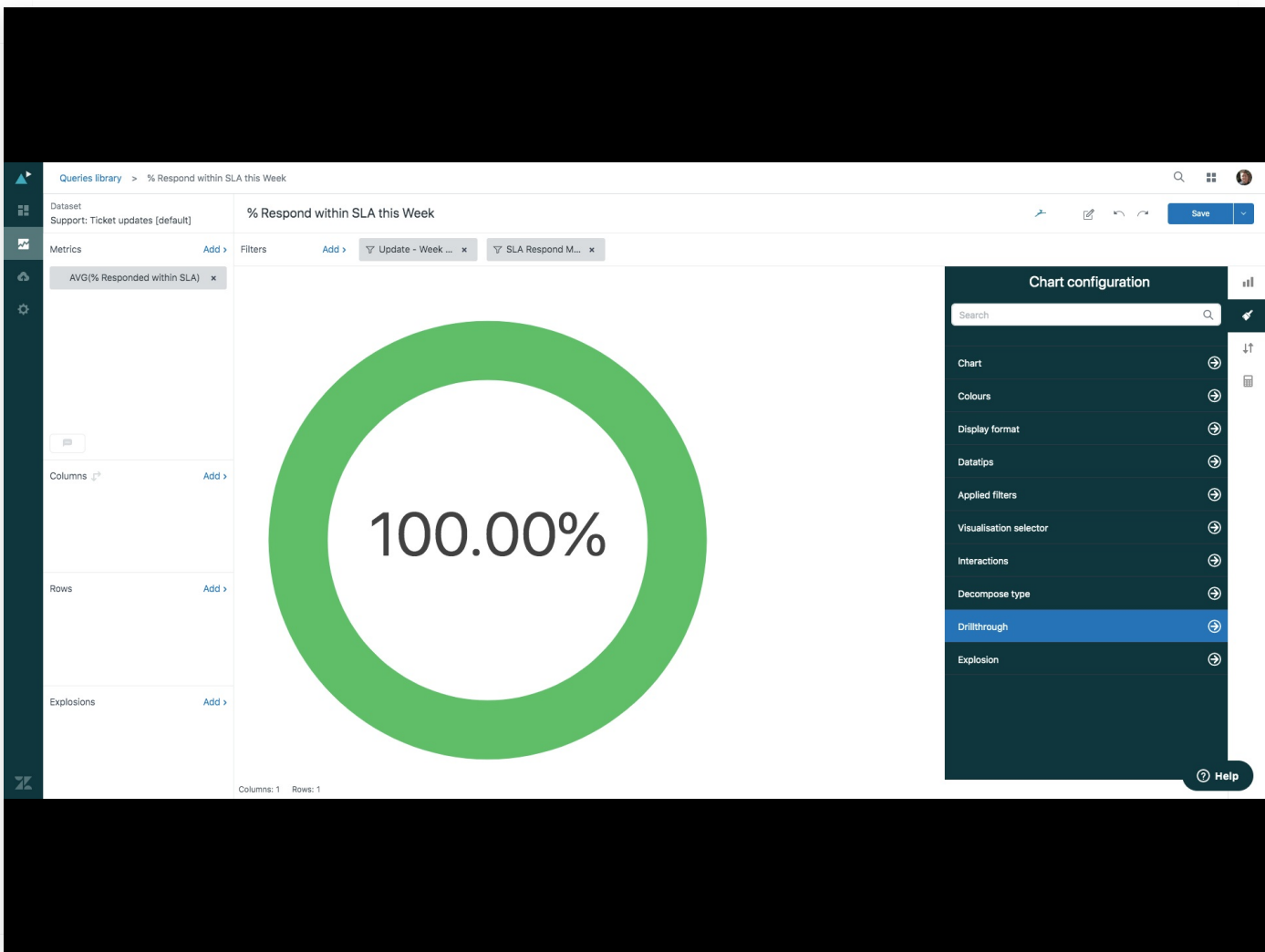
Priority Region

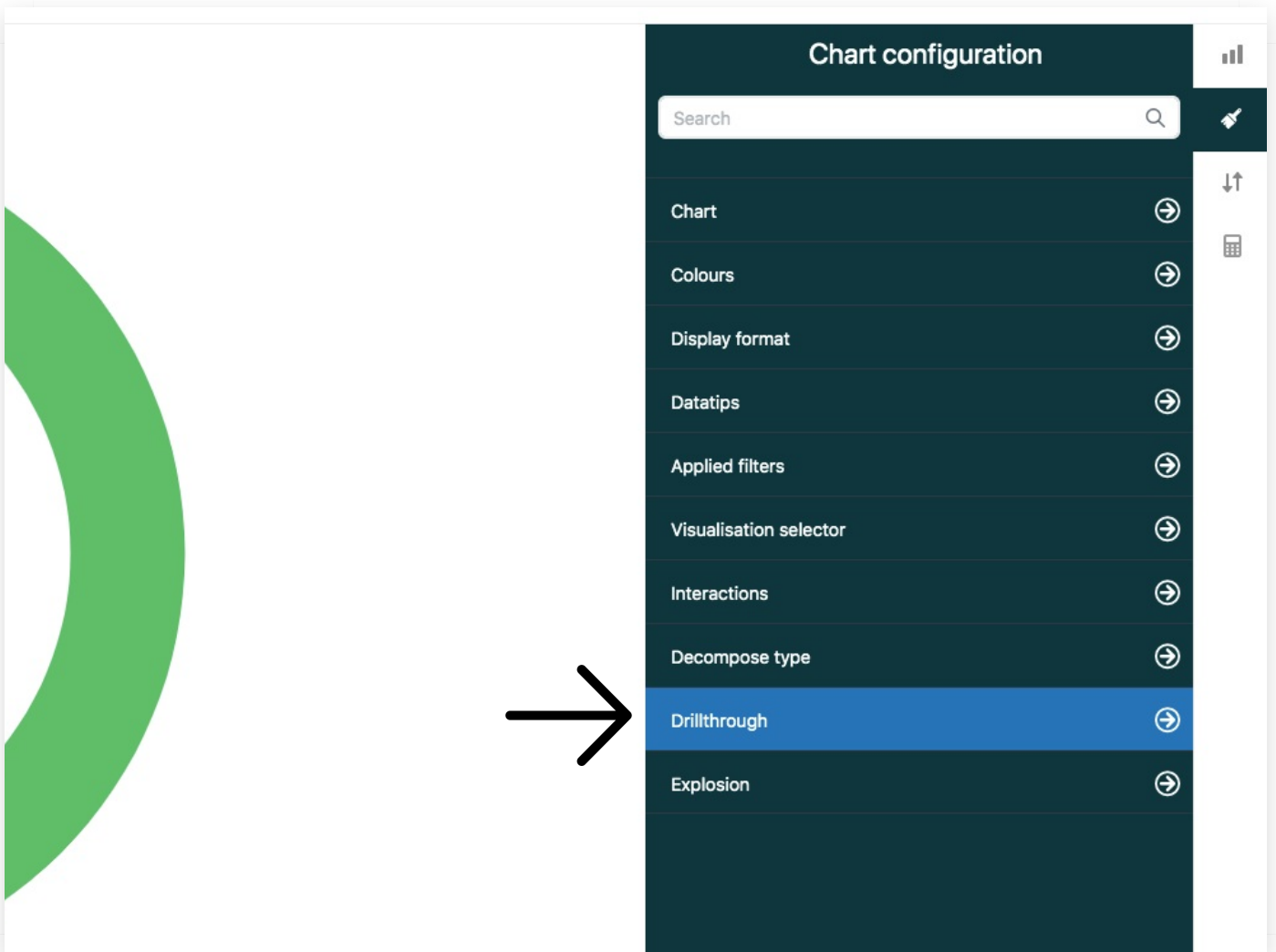
Update ticket assignee	Update channel	Updater name	Ticket ID	Changes - Field name
Geoff Mannin	Web service	Martin Barker	8093	SLA3 Respond Measure
Geoff Mannin	Web service	Martin Barker	8099	SLA3 Respond Measure
Geoff Mannin	Web service	Martin Barker	8101	SLA3 Respond Measure
Geoff Mannin	Web service	Martin Barker	8106	SLA3 Respond Measure
Geoff Mannin	Web service	Martin Barker	8108	SLA3 Respond Measure
Geoff Mannin	Web service	Martin Barker	8112	SLA3 Respond Measure
Geoff Mannin	Web service	Martin Barker	8113	SLA3 Respond Measure
Geoff Mannin	Web service	Martin Barker	8114	SLA3 Respond Measure
Geoff Mannin	Web service	Martin Barker	8115	SLA3 Respond Measure
Geoff Mannin	Web service	Martin Barker	8116	SLA3 Respond Measure
Geoff Mannin	Web service	Martin Barker	8124	SLA3 Respond Measure
Geoff Mannin	Web service	Martin Barker	8125	SLA3 Respond Measure
Geoff Mannin	Web service	Martin Barker	8126	SLA3 Respond Measure
Geoff Mannin	Web service	Martin Barker	8127	SLA3 Respond Measure
Geoff Mannin	Web service	Martin Barker	8128	SLA3 Respond Measure
Geoff Mannin	Web service	Martin Barker	8129	SLA3 Respond Measure

79
5
100.00% 100.00% 98.53%

Ok Cancel CSV Excel

and the tabular based results can be exported in CSV or Excel format





The columns in the drill through can be defined, by editing the associated query definition

00%

Drillthrough

Select the elements you want to see in your drillthrough and in what order

Search

- Select all
- Ticket ID
- Update
- Updater name
- Update ticket assignee
- Update channel
- Changes - Field name
- Changes - New value
- Assignee email
- Assignee name
- Assignee role
- Assignee status
- + Ticket organisation name
- Ticket organisation status
- Requester email
- Requester name
- Requester role
- Requester status
- Submitter email
- Submitter name
- Submitter role
- Submitter status

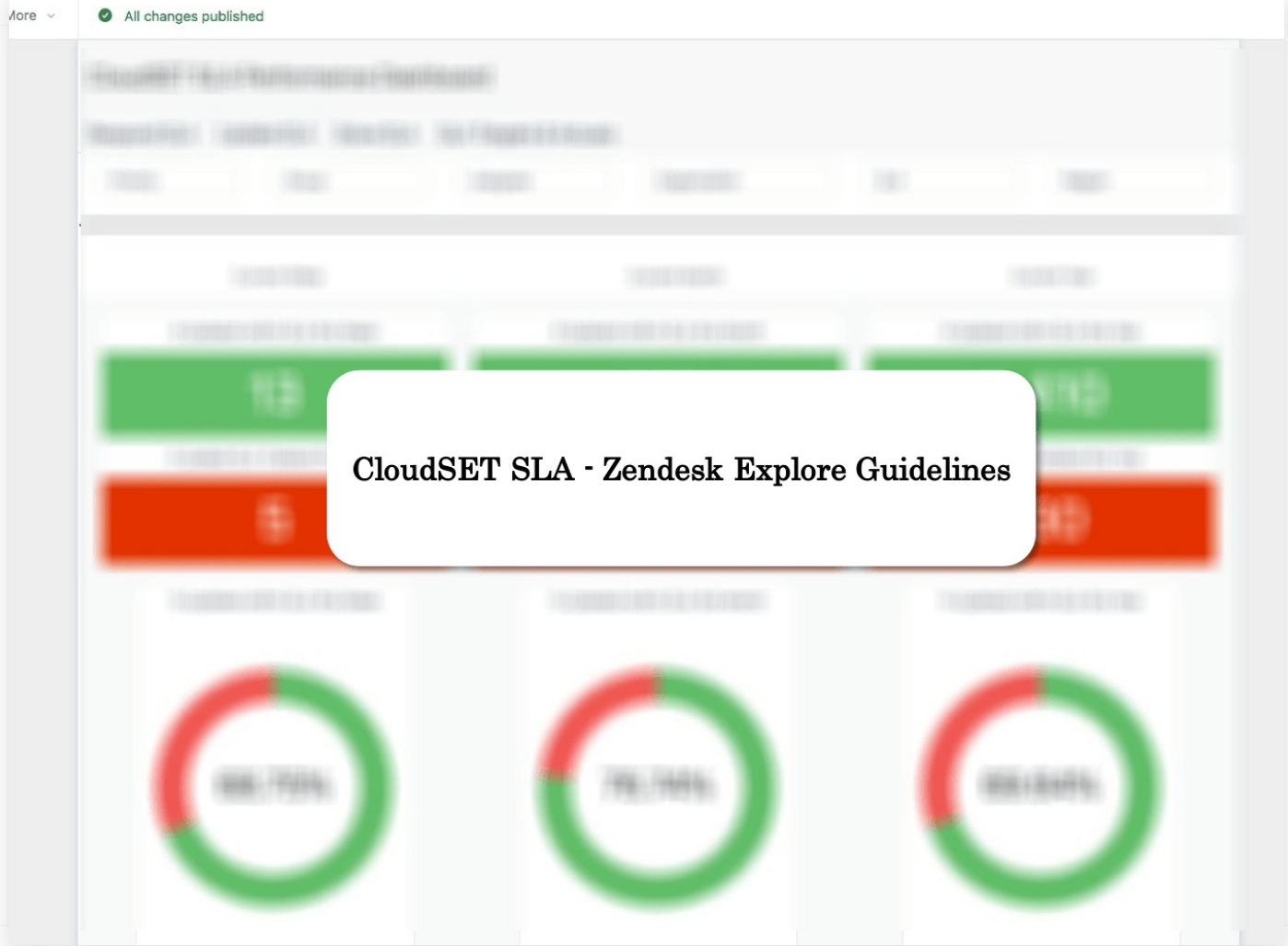
and selecting the fields to be included, from the available list

The screenshot displays a data visualization tool interface. At the top, the breadcrumb navigation shows 'Queries library > % Respond within SLA this Week'. The main area is divided into several sections: 'Dataset' (Support: Ticket updates [default]), 'Metrics' (AVG(% Responded within SLA)), and 'Filters' (Update - Week..., SLA Respond M...). A modal window titled 'SLA Respond Measured' is open, showing a search bar, 'Selected' and 'Excluded' buttons, and a list of rows with checkboxes. The 'NULL' row is checked, and a mouse cursor is pointing at it. A large green circular graphic with '100%' is overlaid on the right side of the modal. The bottom of the modal shows an 'Apply' button and a right arrow icon. The status bar at the bottom indicates 'Columns: 1 Rows: 1'.

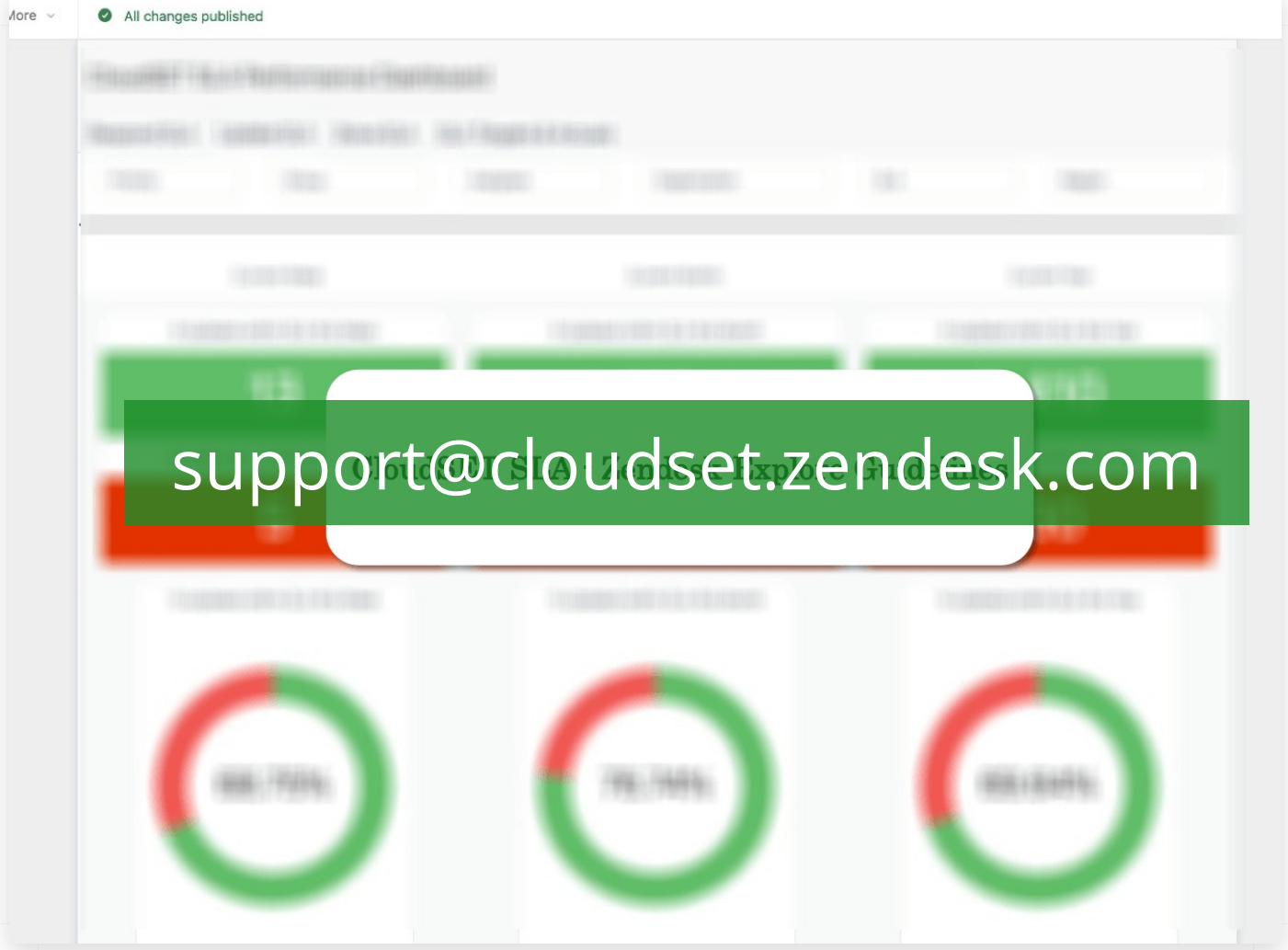
Additional filters can be introduced to the query, to limit the list of tickets in the drill through table, to only those of relevance

The screenshot displays a data visualization tool interface. The main panel shows a search bar with the text "measure" and a list of measures. The "SLA3 Respond Measure" is selected, indicated by a checkmark and a mouse cursor. A red box highlights the "Changes - Field name" label. The interface also shows a sidebar with navigation icons, a main panel with a search bar and a list of measures, and a large green circular progress indicator showing 0%.

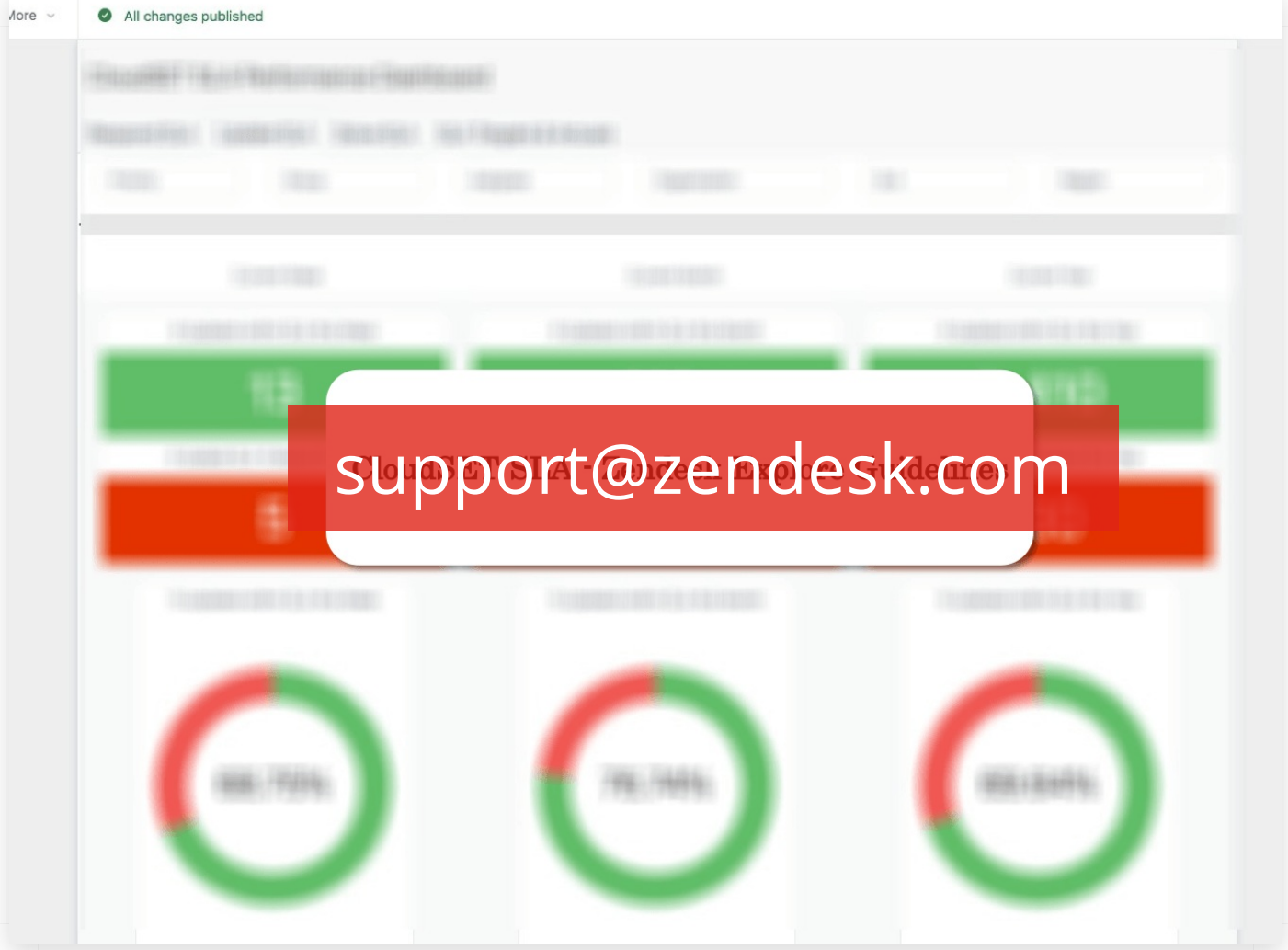
In order to avoid long running queries, or exceeding the 50k row limit, it will also be necessary to apply a filter, that restricts the type and volume of changes returned in the underlying query, to include only those that involve changes to the SLA measurement



Thank you for watching this video, the purpose of which has been to provide guidelines in the use of CloudSET SLA metrics, in your Zendesk Explore reports and dashboards



Should you have any questions pertaining specifically to the data and metrics, provided as part of your CloudSET SLA setup for use in your reports, then please contact our support desk at support@cloudset.zendesk.com



Should you require any training or have questions pertaining to the functionality and capability of Zendesk Explore, then this support can be obtained as part of your Zendesk subscription, through your Zendesk account manager, or via the zendesk support desk