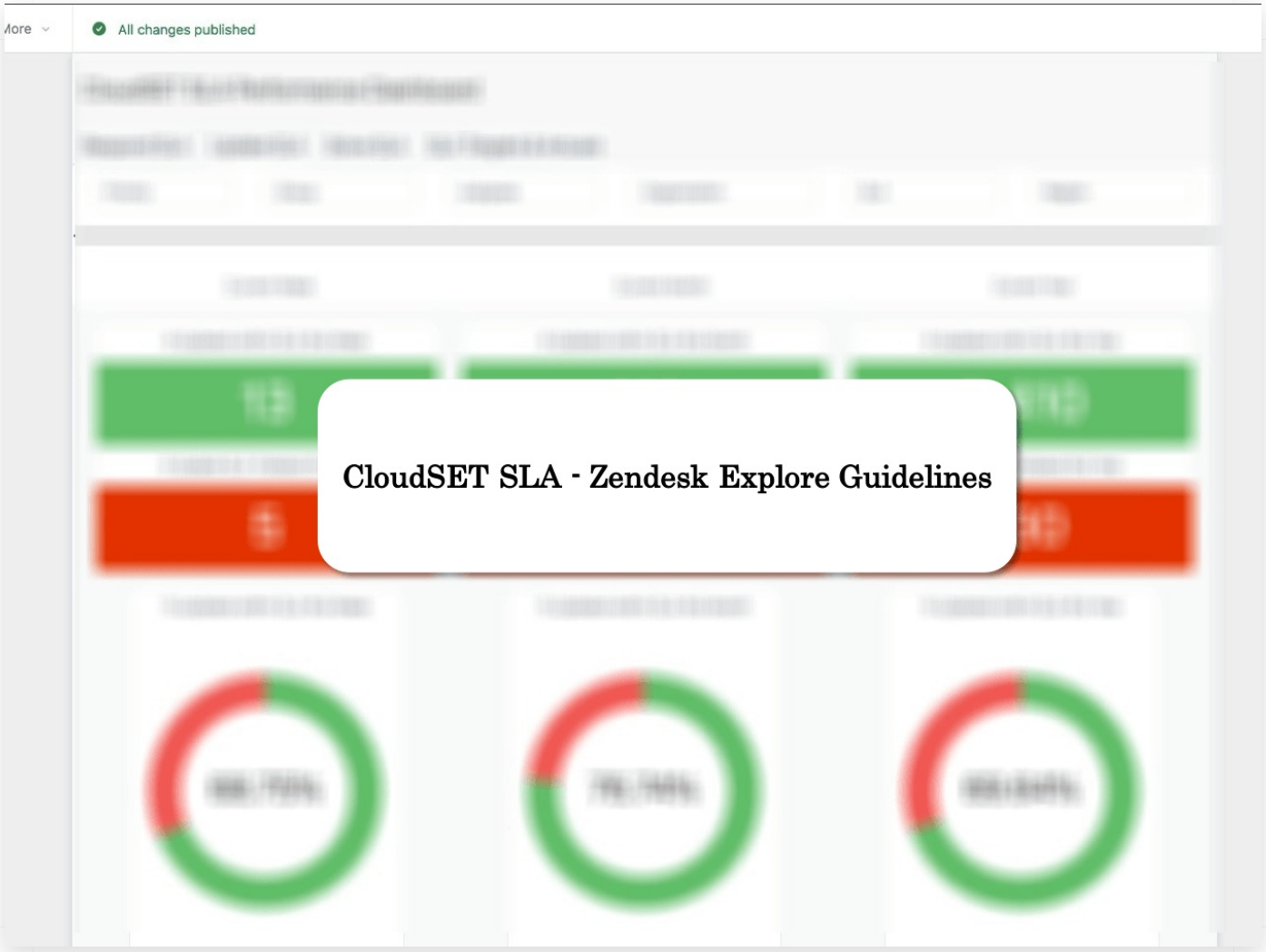
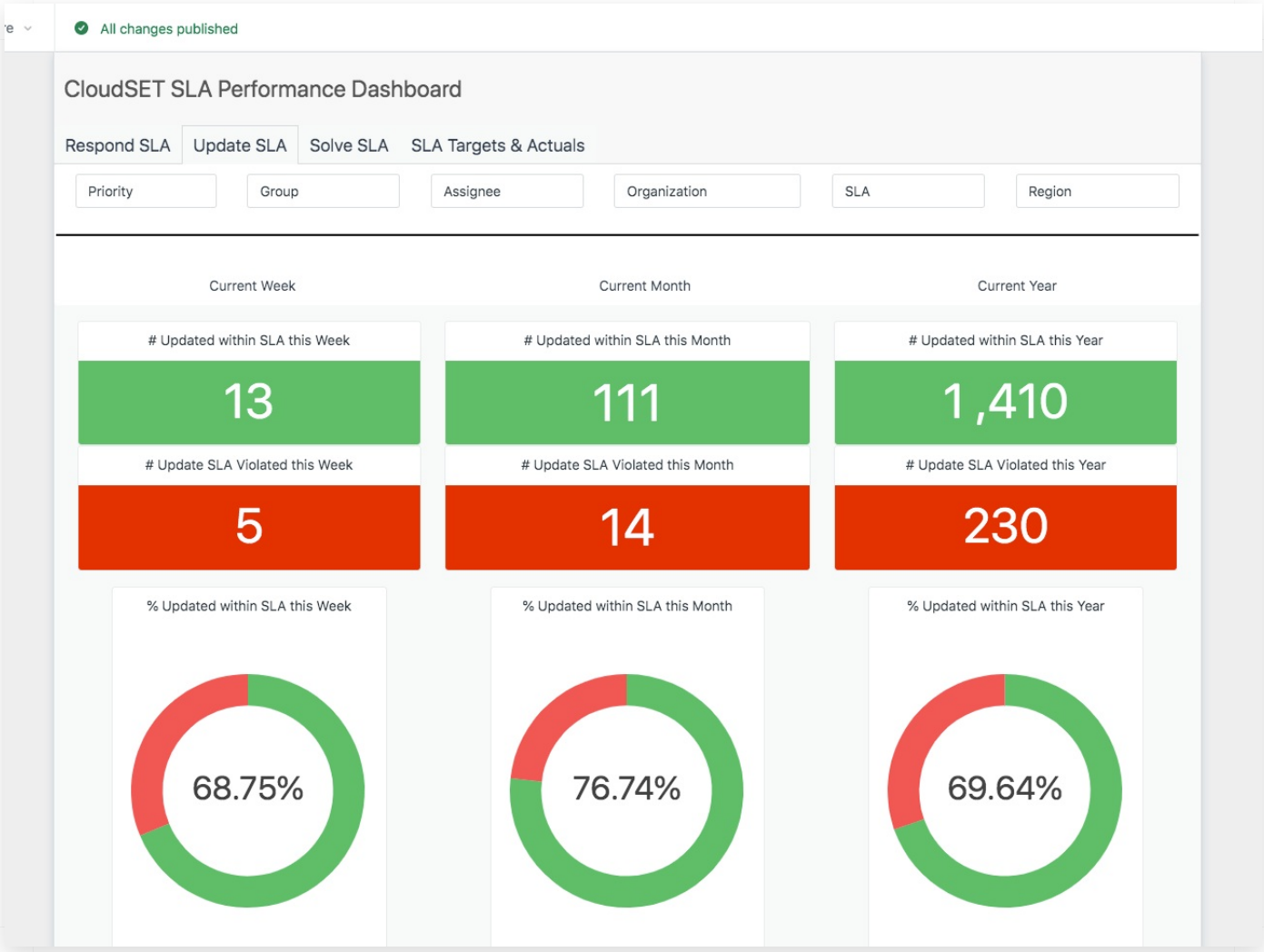
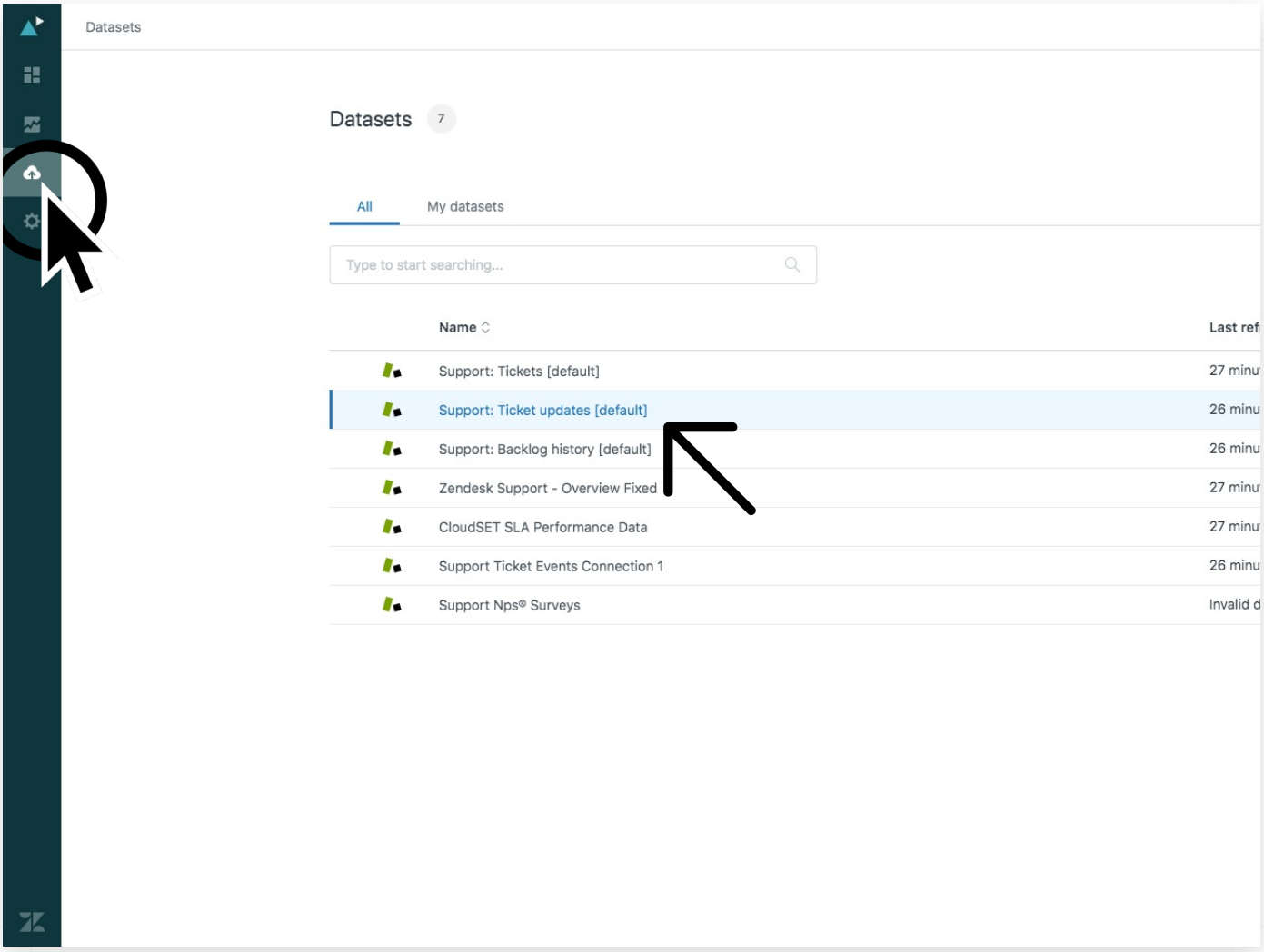
CloudSET SLA - Zendesk Explore Reports



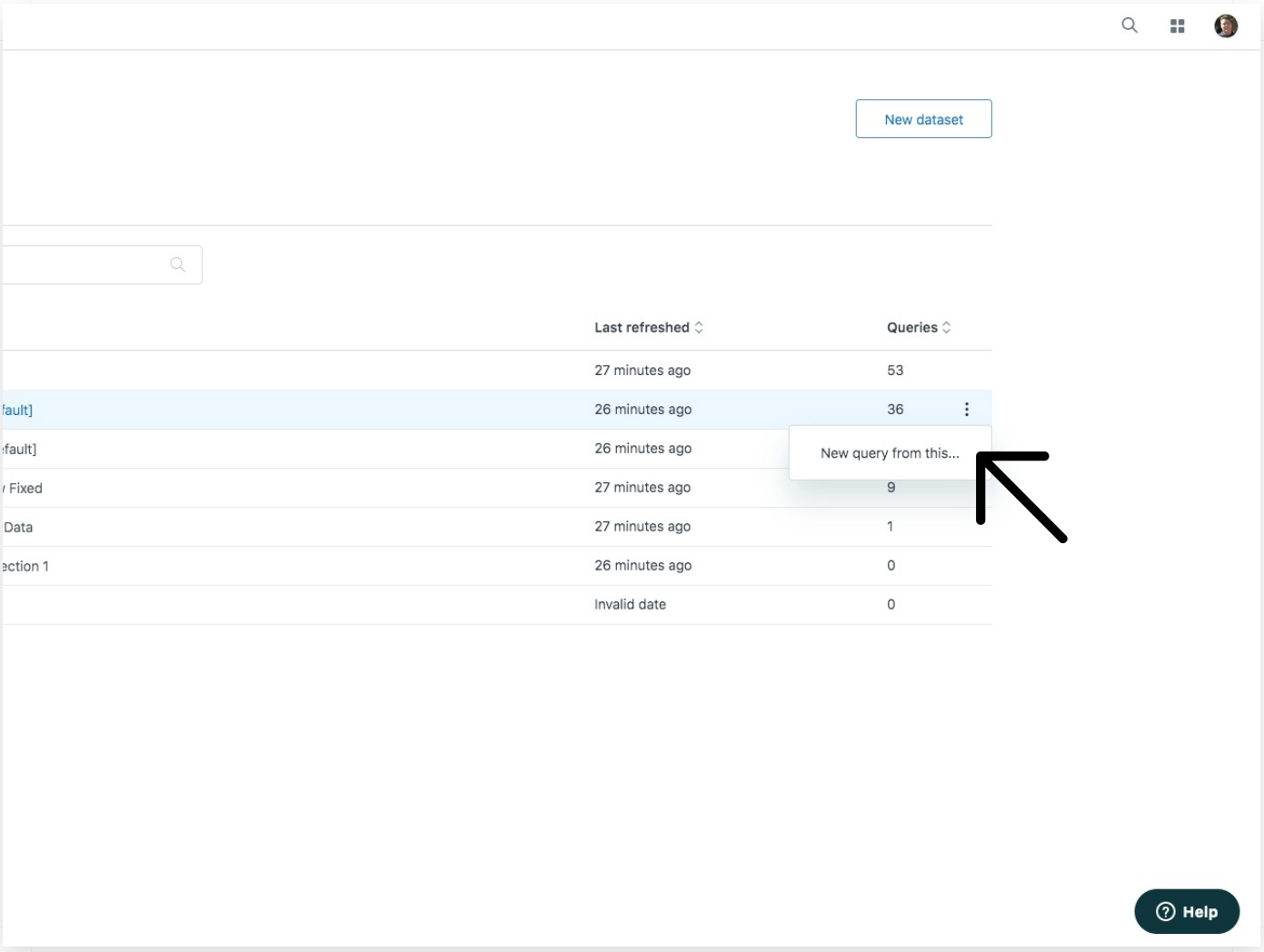
The purpose of this short video, is to provide guidelines in the use of CloudSET SLA metrics, in your Zendesk Explore reports and dashboards



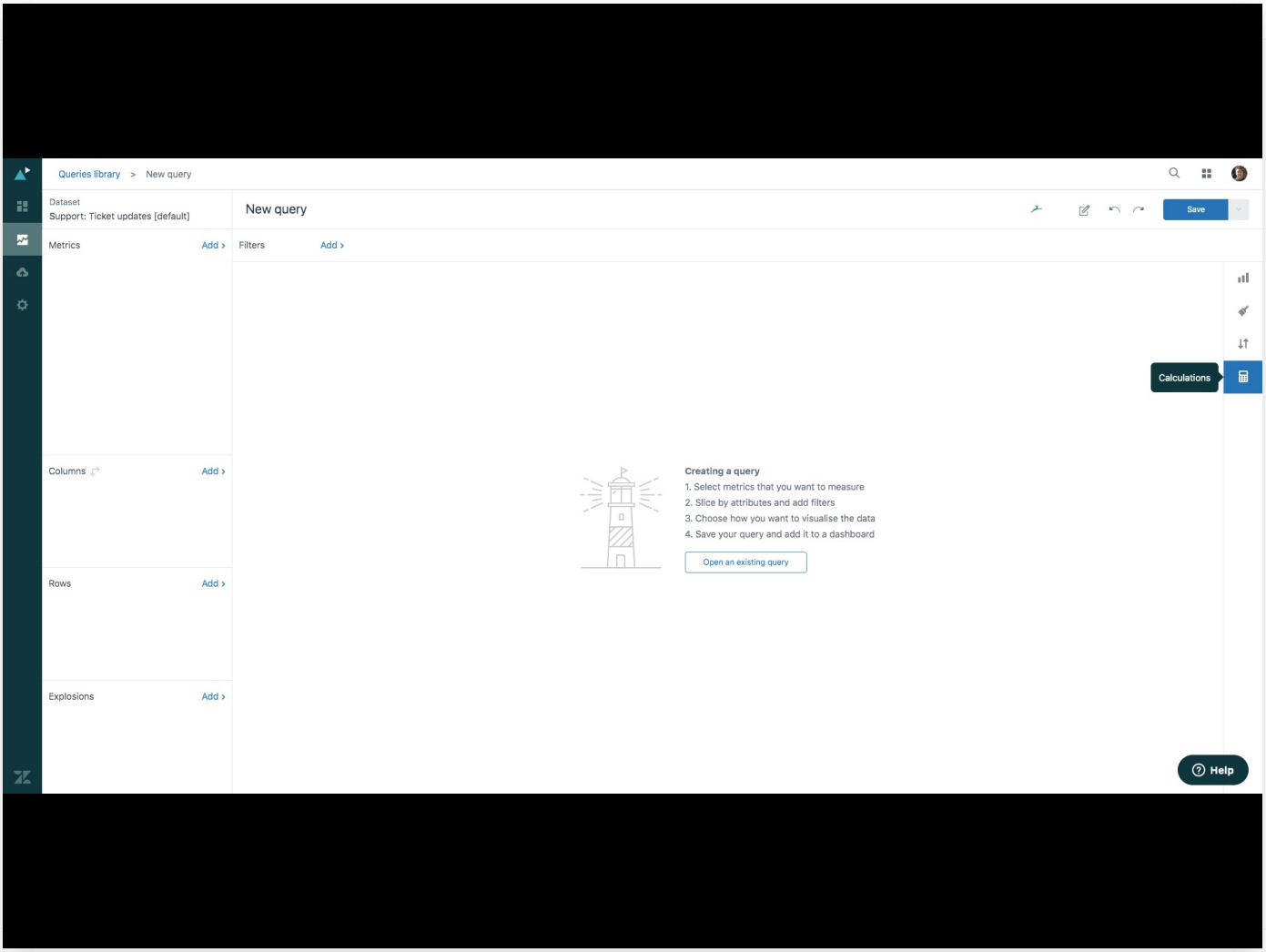
It is assumed that the audience already has some knowledge and training in the use of Zendesk Explore, but this video will guide you in the use of some of the available capabilities, that can be applied to build a simple SLA performance dashboard, using the metrics measured as part of your CloudSET SLA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

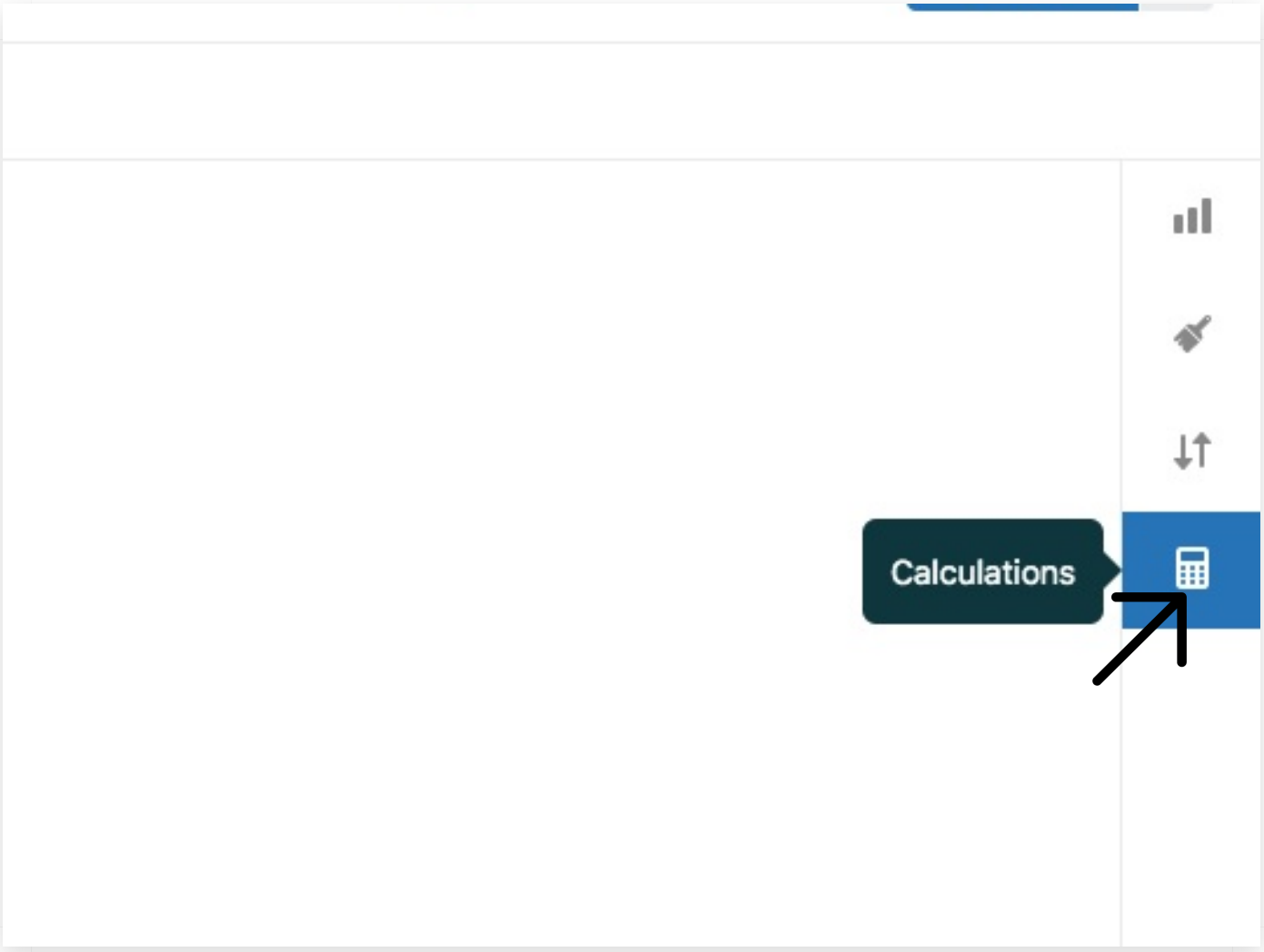


When building this example dashboard, we make use of queries based on the ticket updates dataset

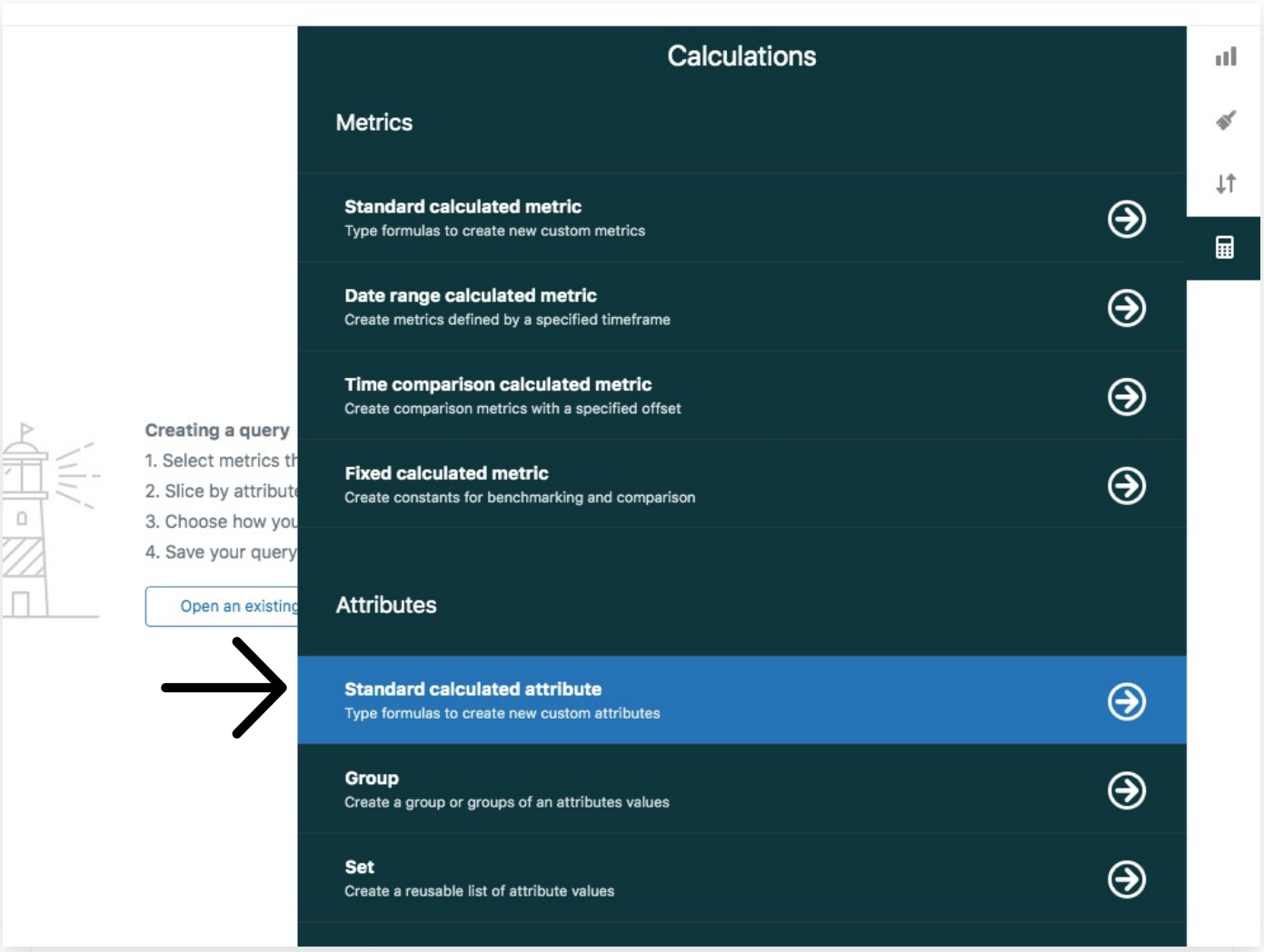


Start by creating a new query based on this dataset

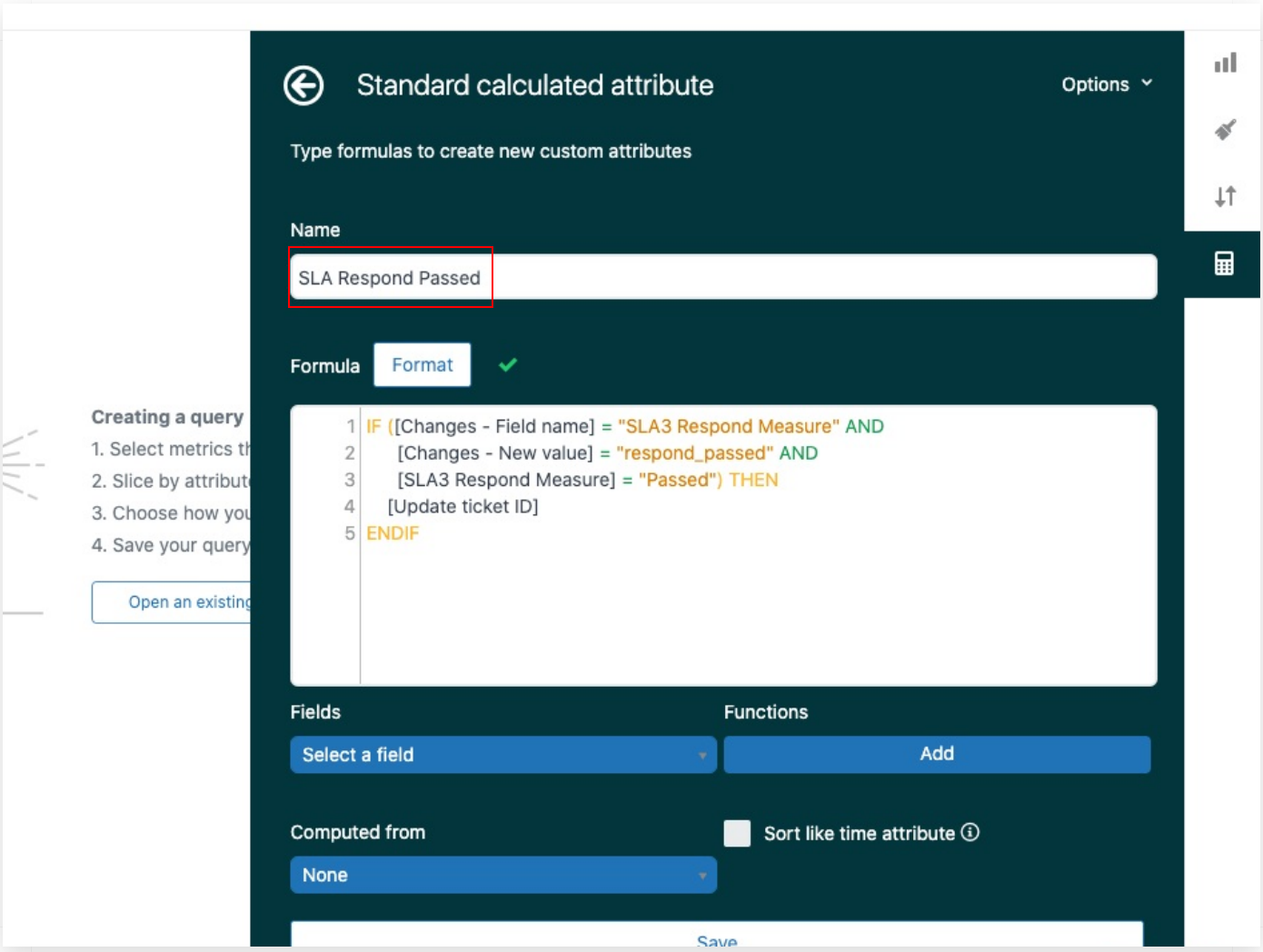

Queries library > New query
Dataset
Support: Ticket updates [default]
New query
Save
Metrics Add ›
Filters Add ›
Columns Add ›
Rows Add ›
Explosions Add ›
Calculations
Creating a query
1. Select metrics that you want to measure
2. Slice by attributes and add filters
3. Choose how you want to visualise the data
4. Save your query and add it to a dashboard
Open an existing query
Help



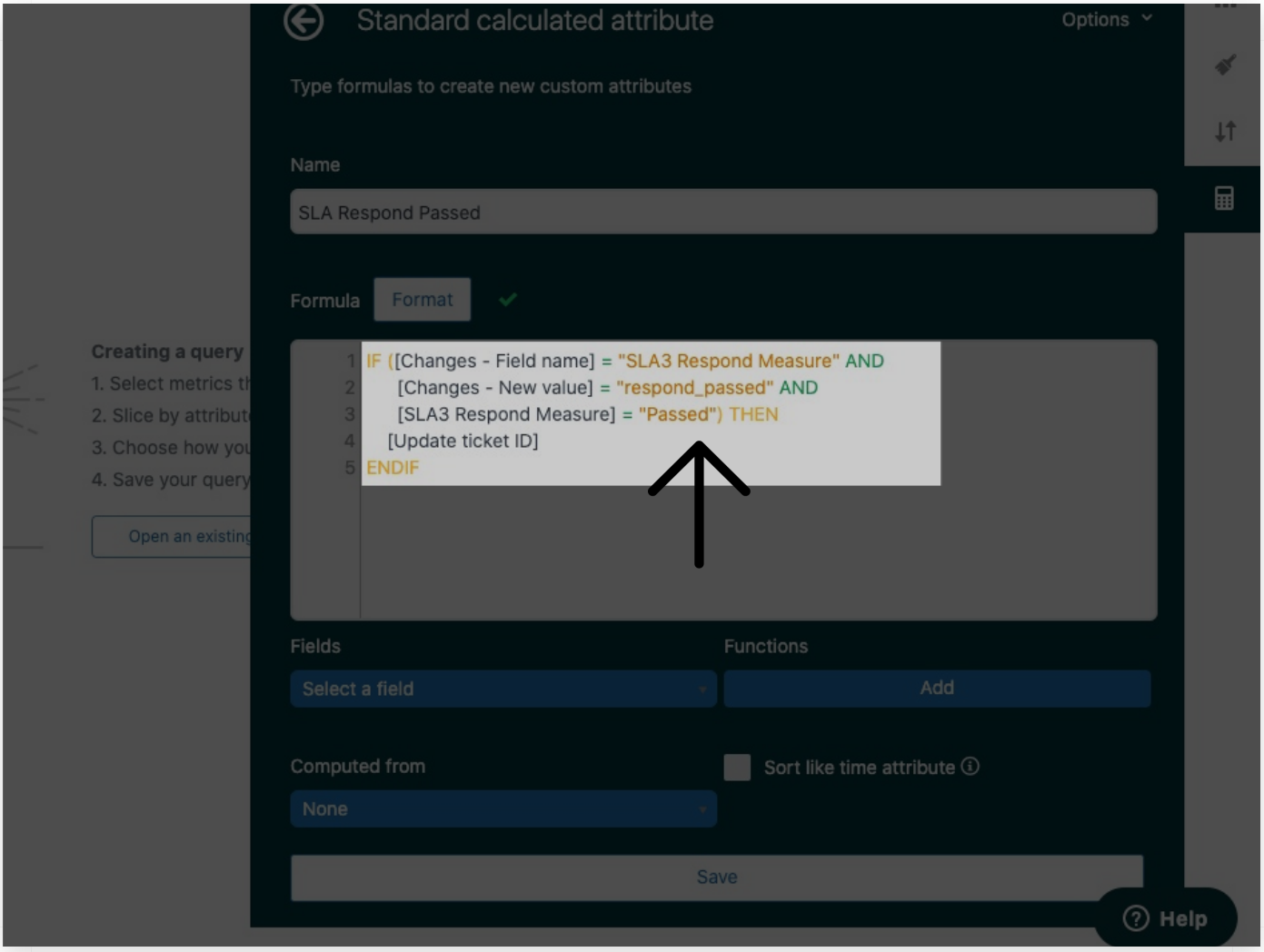
From within the query definition page, it is possible to create new calculated attributes, and calculated metrics



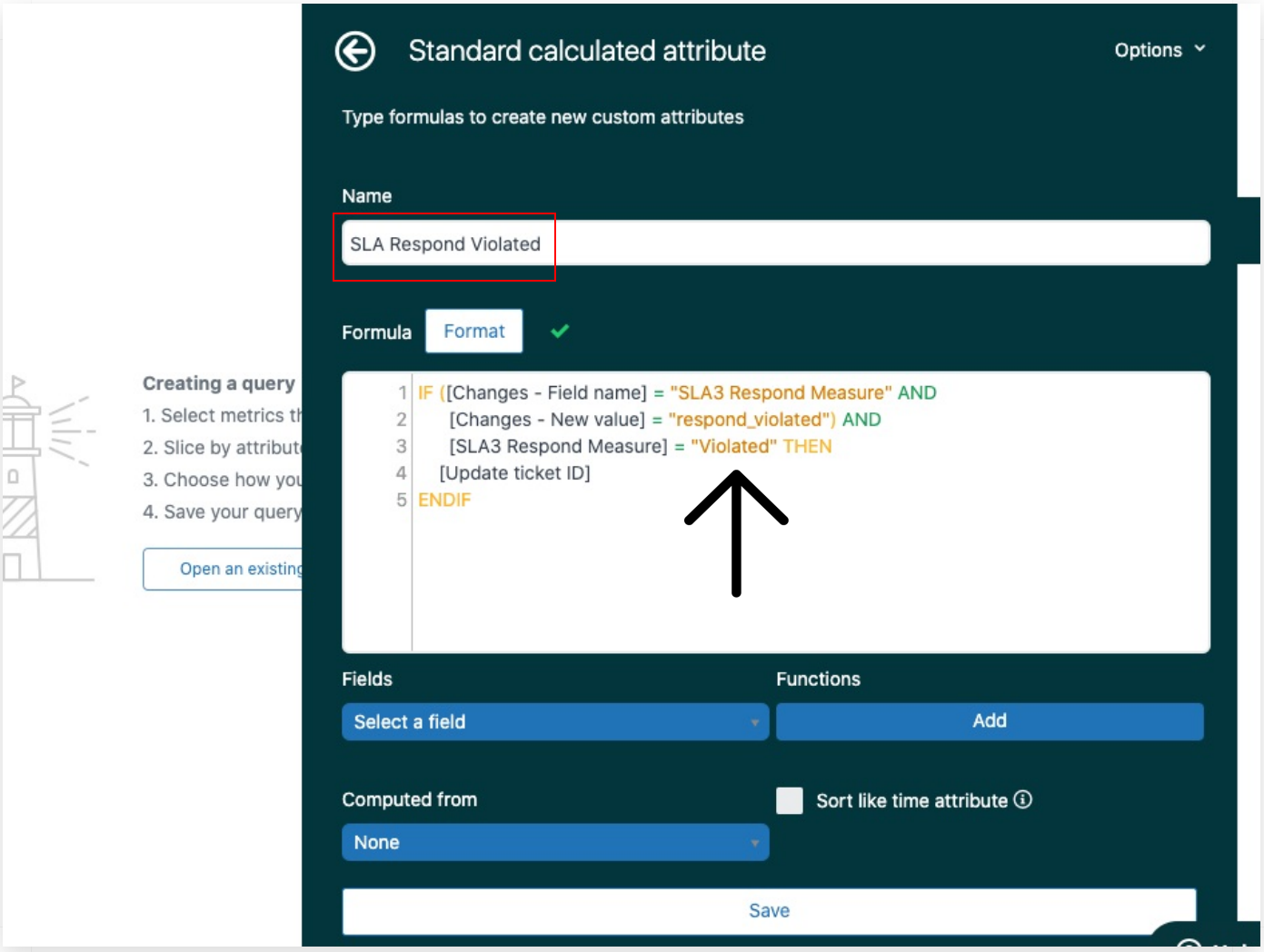
For each event measured in your CloudSET SLA setup, it will be necessary to create 2 calculated attributes



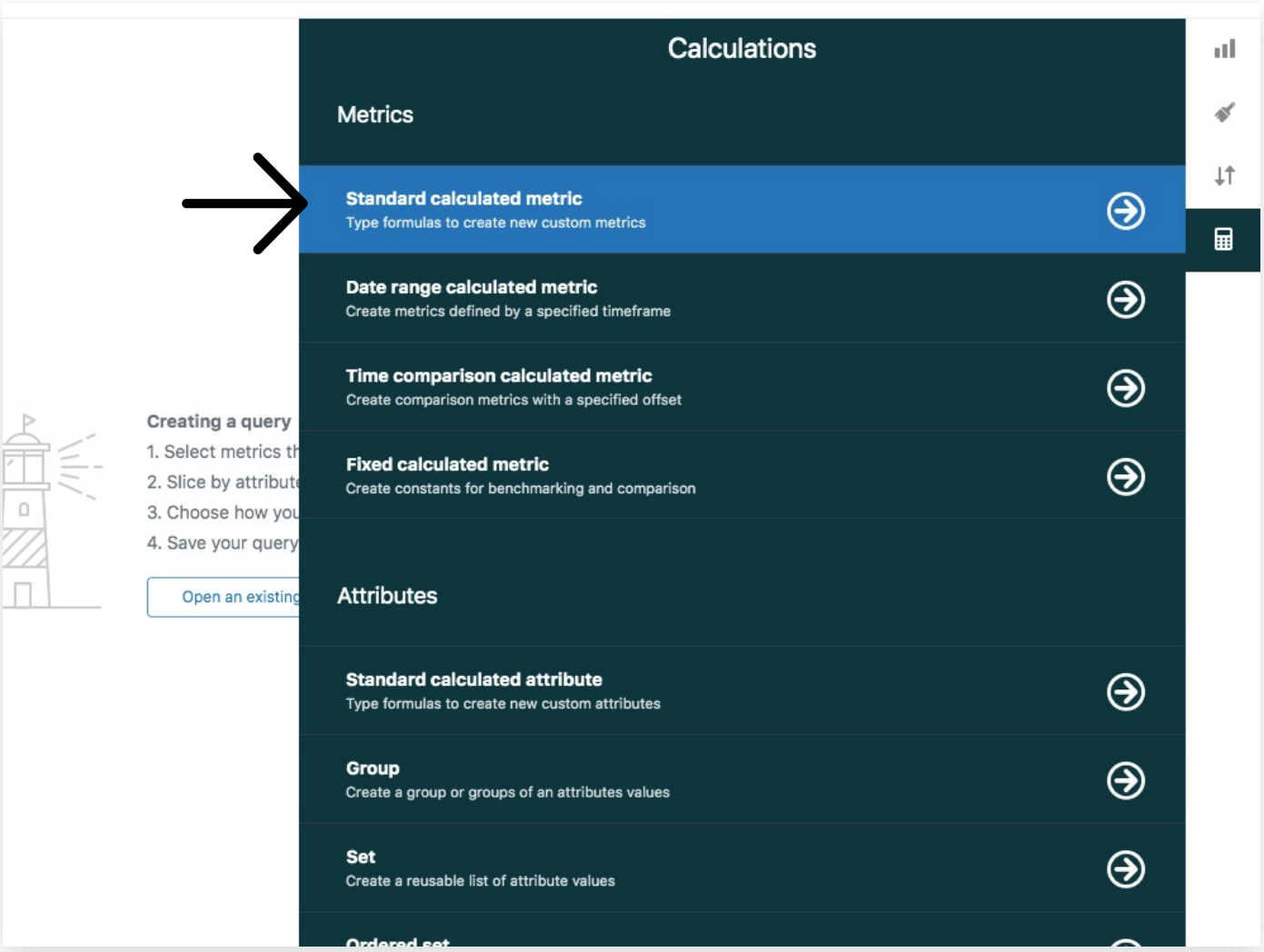
In this example, the SLA setup measures the time taken to provide and initial response, using the respond timer. So a calculated attribute is required, to identify if and when the initial response was given within the SLA (i.e., respond passed)



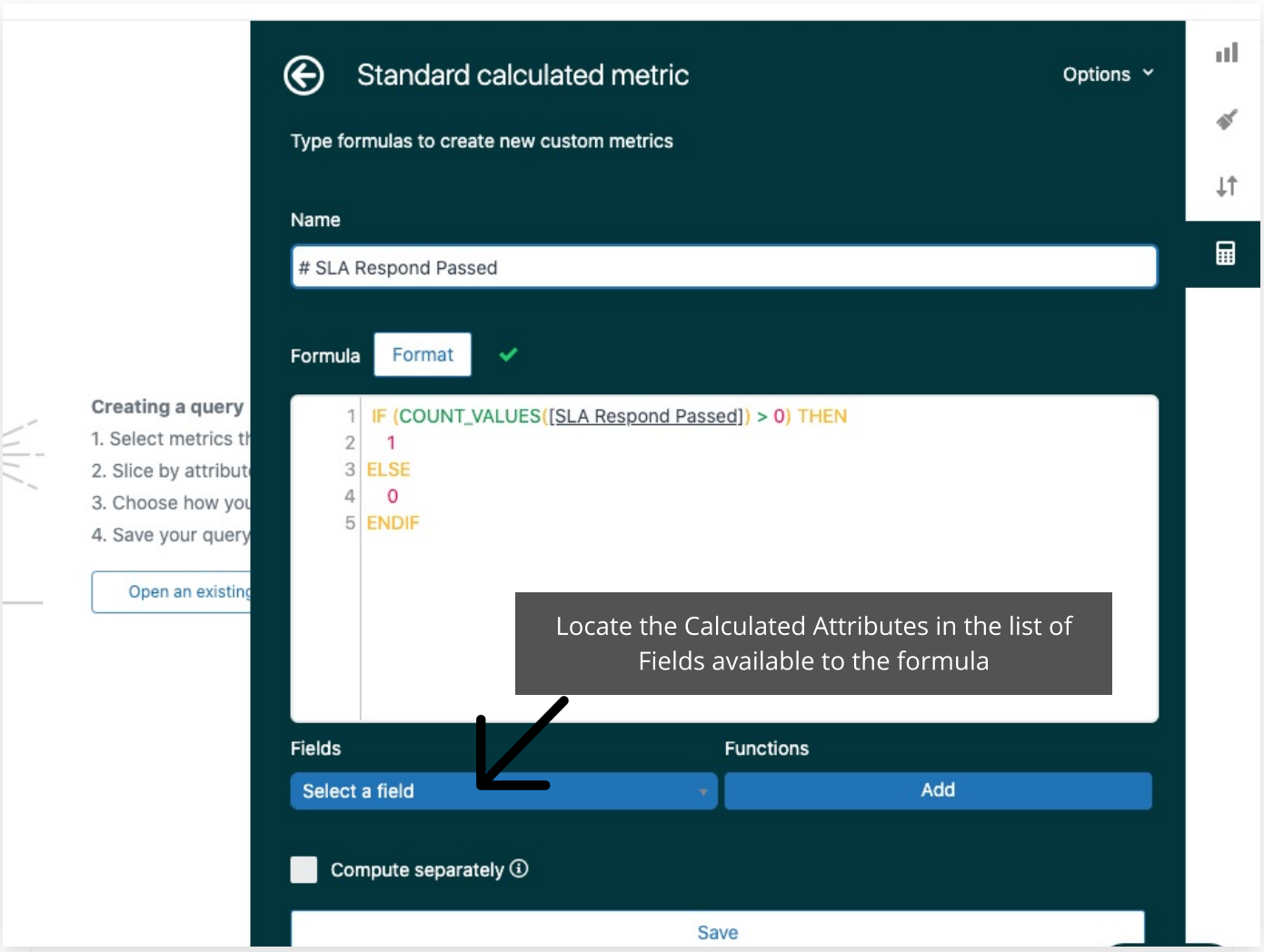
This is achieved by checking to see if the SLA respond measure field, has been changed with a value set to respond_passed, and the current SLA measurement is also passed If so, the calculated attribute is set with the value of the ID for the ticket involved in the update



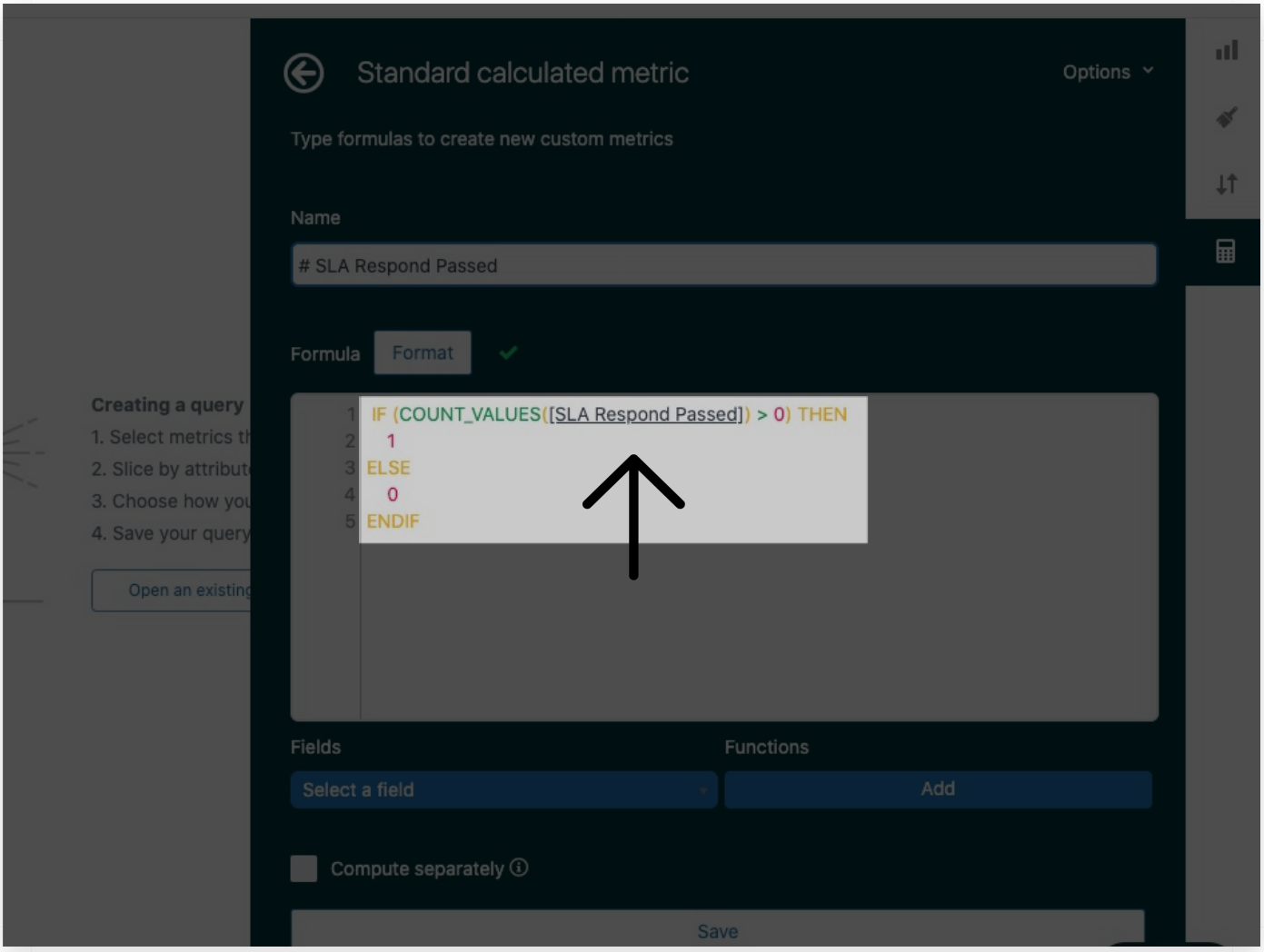
A second calculated attribute is required, to identify if an initial response has not been provided for the ticket, within the SLA (i.e., respond violated)



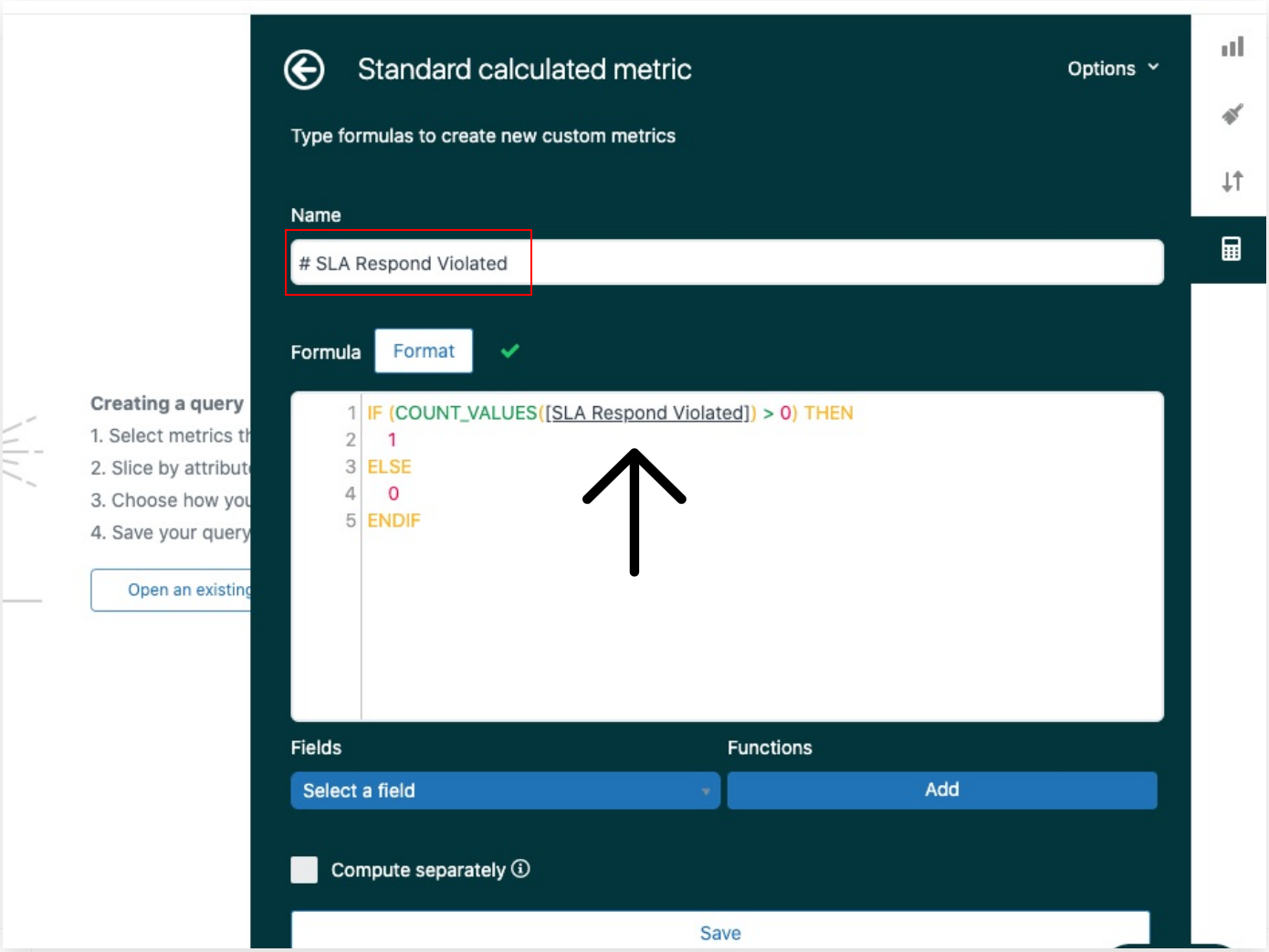
Once created, the calculated attributes will be available for use when creating the calculated metrics, required in the queries involved in the example dashboard



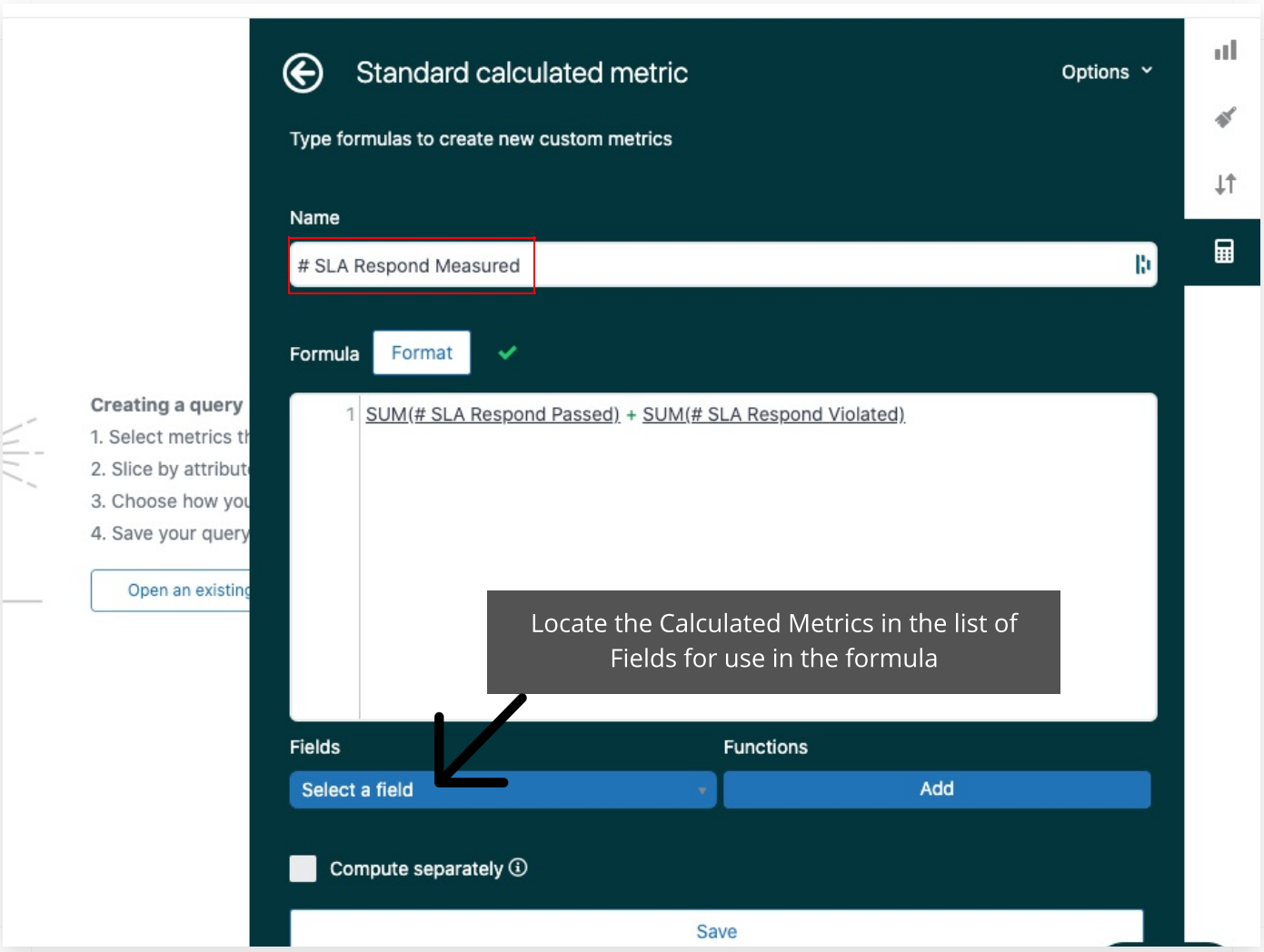
A calculated metric is required for each of the 3 types of query used in the example dashboard, the first of which is used to query the number of tickets that have provided an initial response within the SLA (i.e., respond passed)



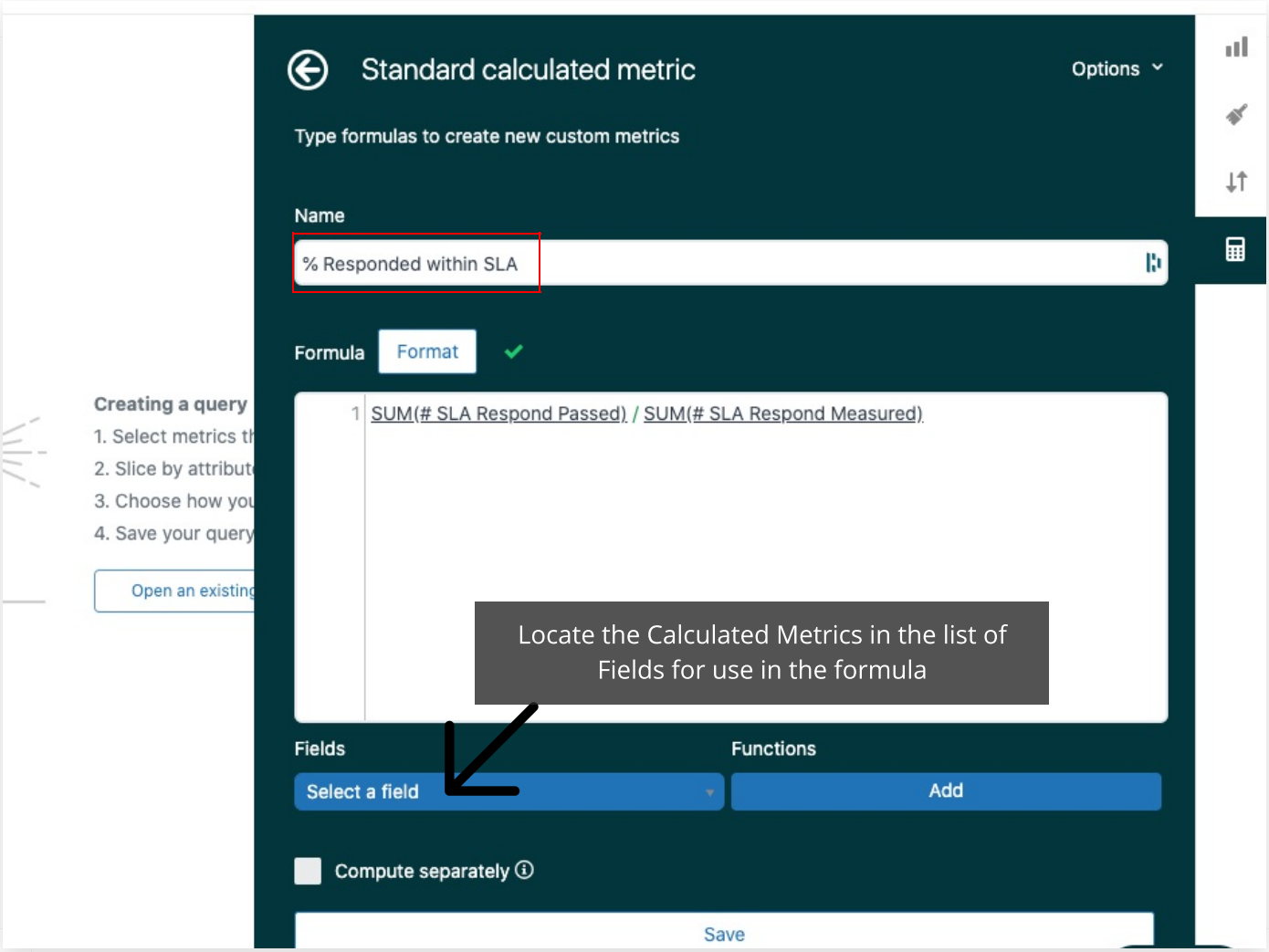
This is achieved, by counting the number of instances in which a value has been set in the calculated attribute, used to identify when the initial response was given within the SLA (i.e., passed) It's important to ensure the presence of the SLA pass event is counted only once, since it's possible more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



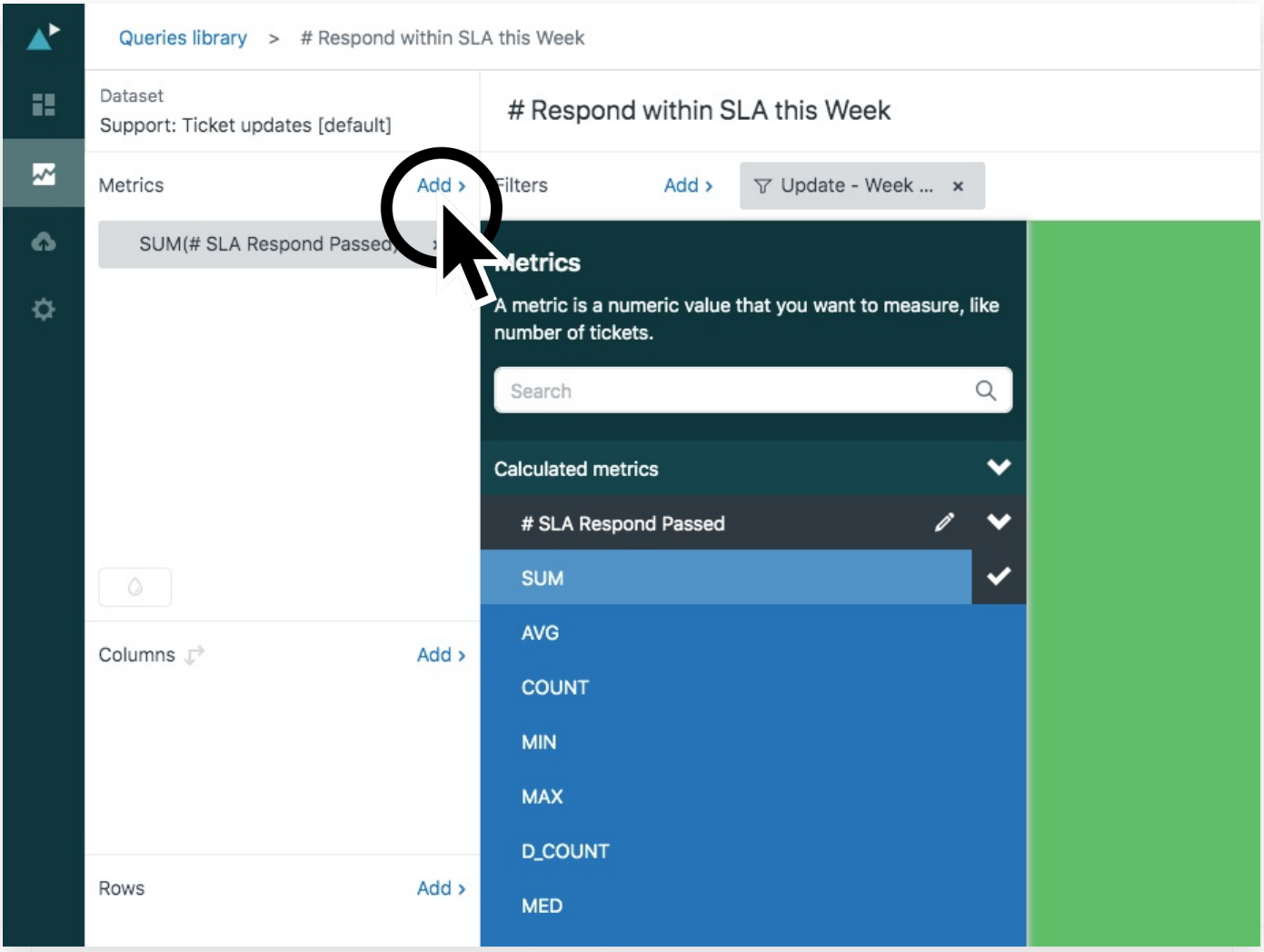
A second metric is required to count the number of instances in which a value has been set in the calculated attribute, used to identify when the initial response was not given within the SLA (i.e., violated)



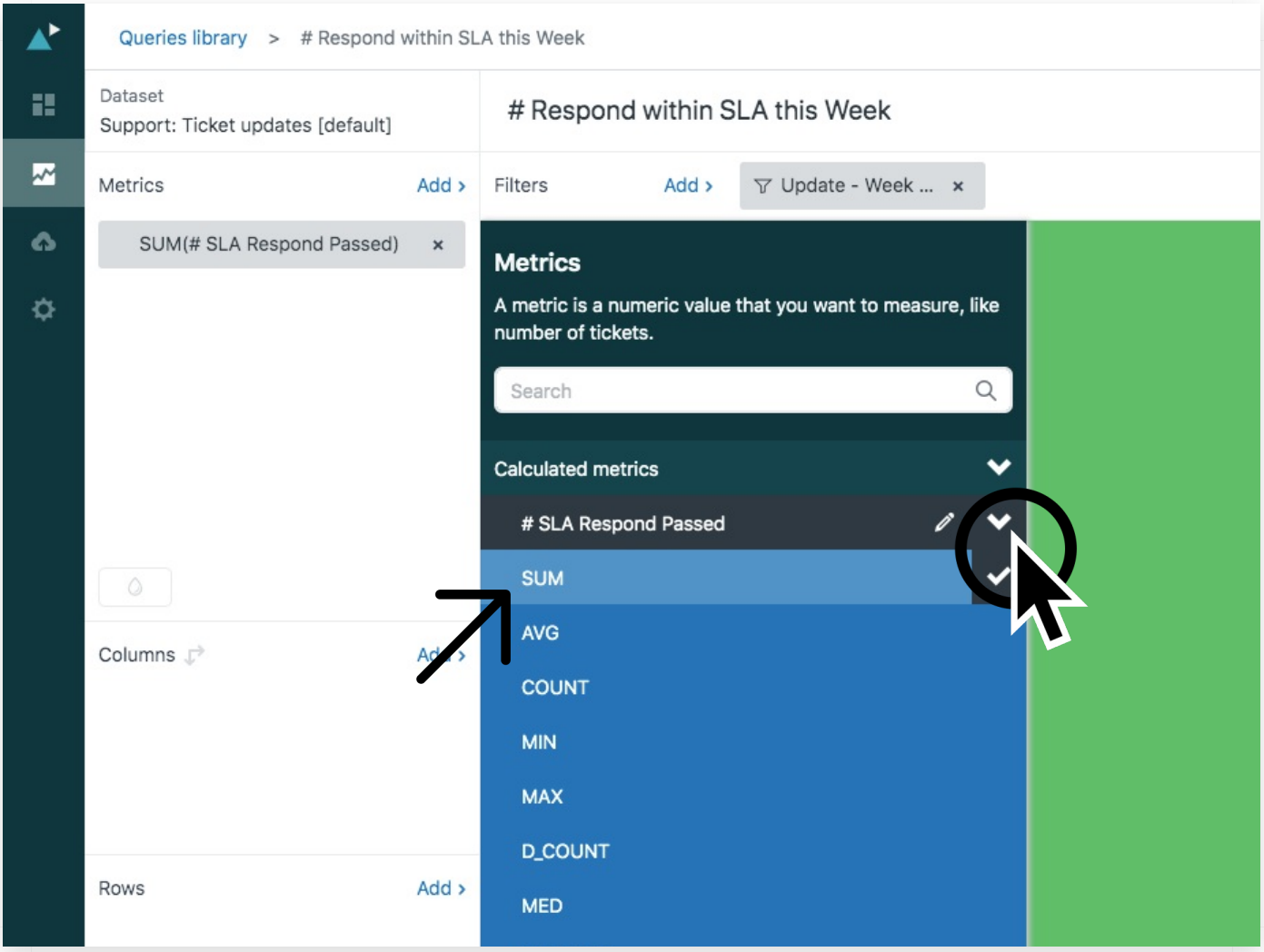
A third metric is required, to sum together the total number of SLA passes and SLA violations, calculated in the previous two metrics



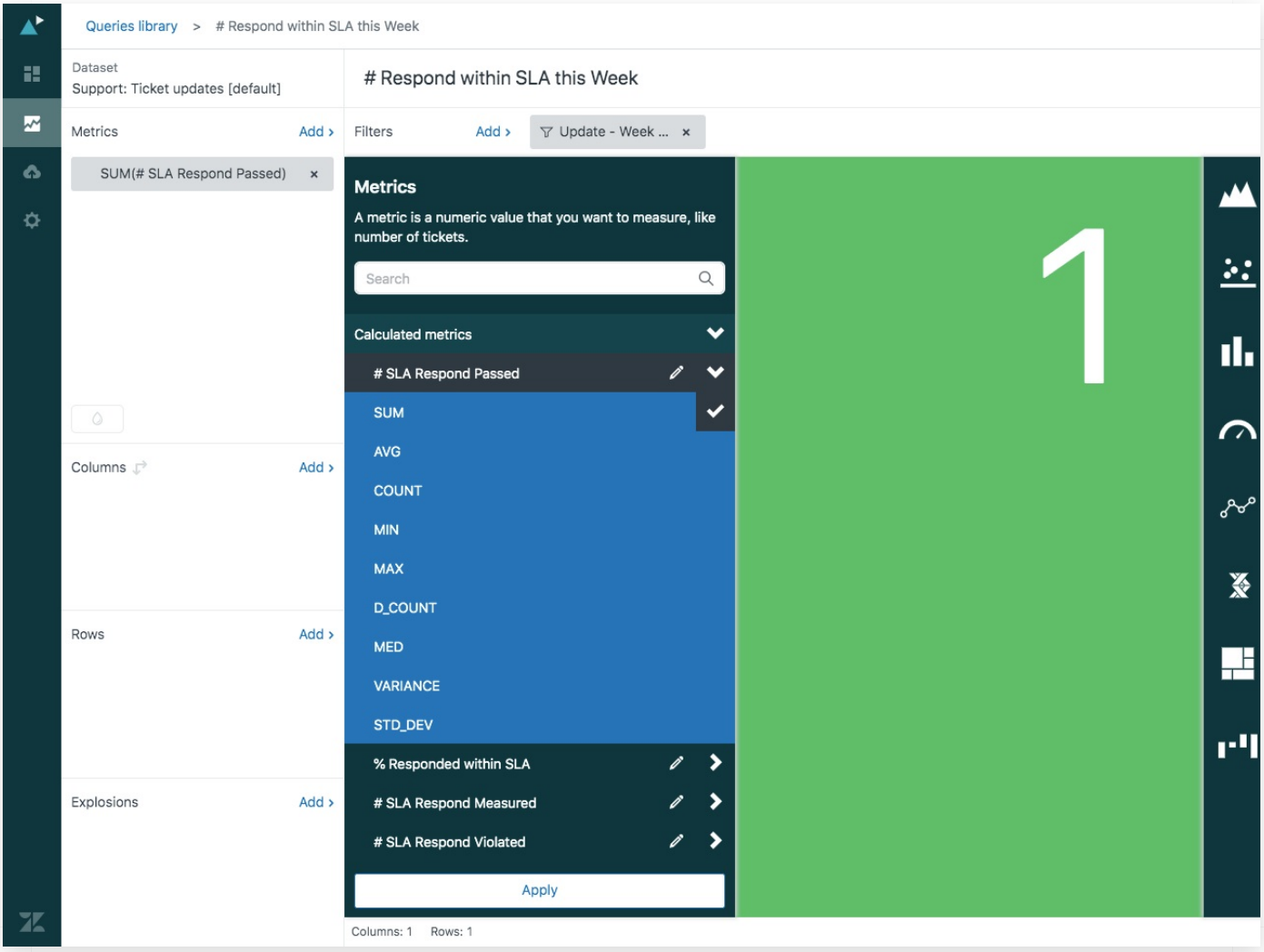
The final metric is required to calculate the percentage of tickets where an initial response has been given within the SLA, dividing the number of SLA passes, by the total number of SLA respond measurements taken

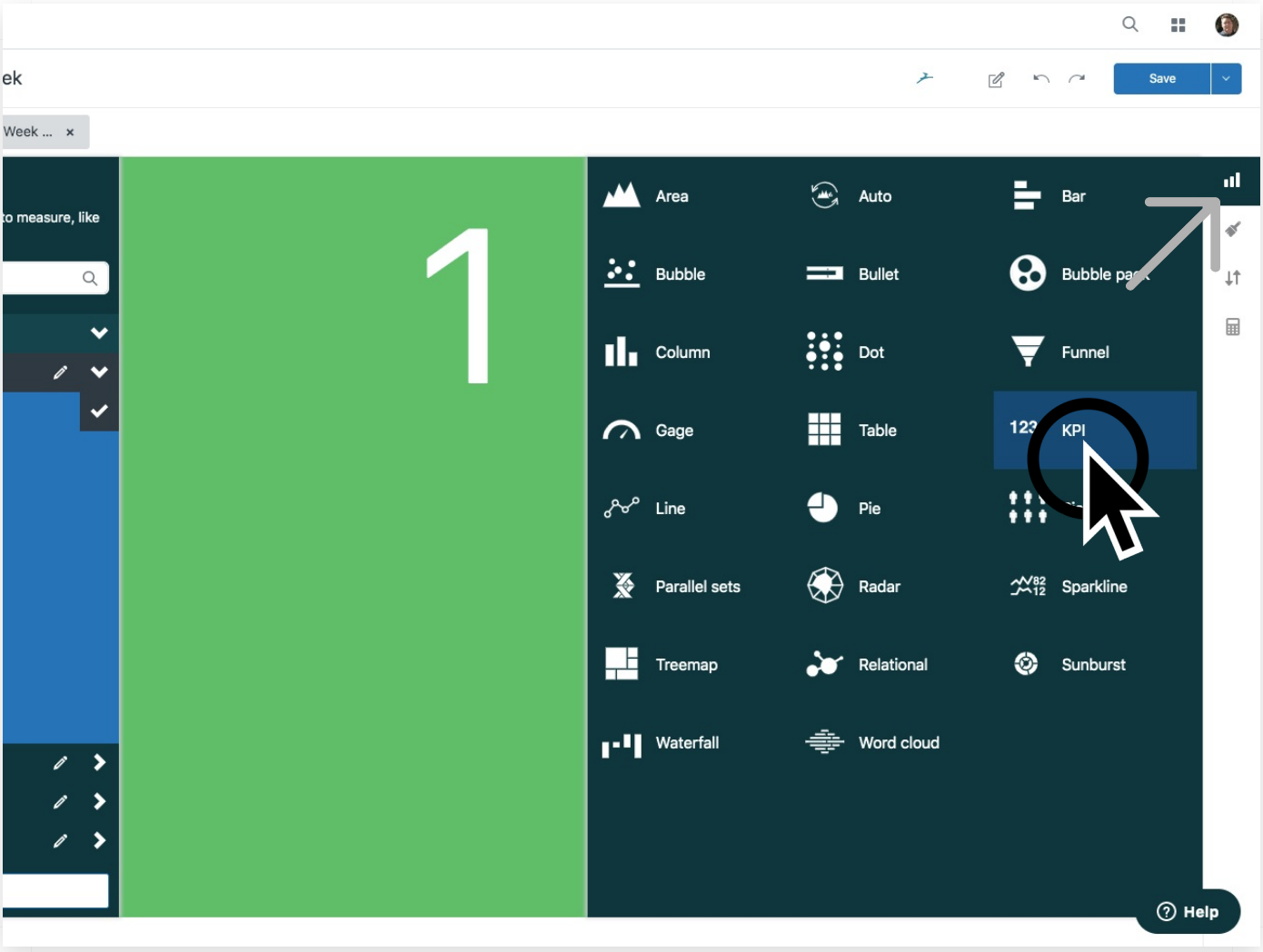


It is now possible to start defining the queries involved in the example dashboard, by adding the appropriate calculated metric from the list

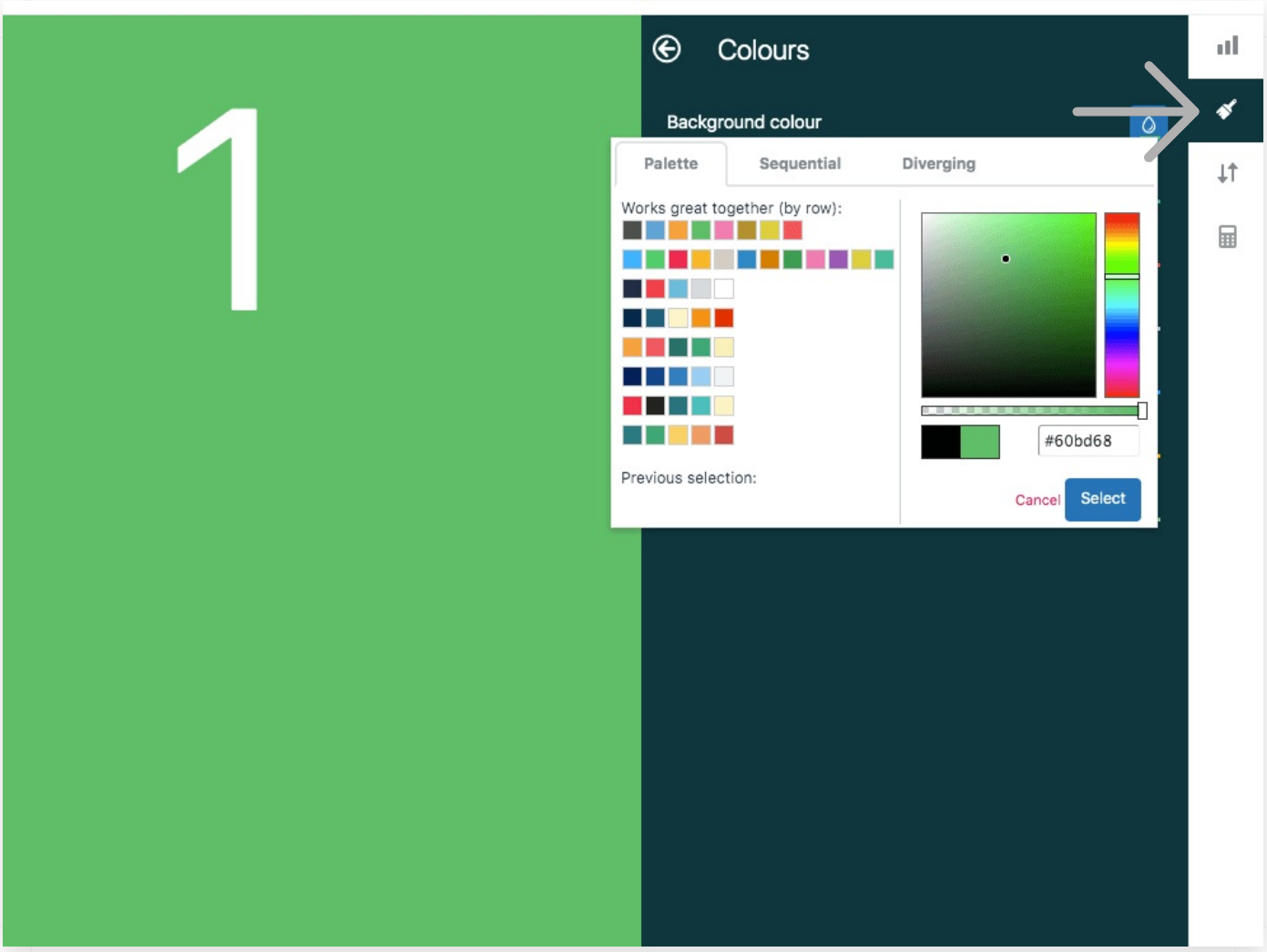


The first query in this example will report the number of tickets for which an initial response has been given within the SLA, by summing the number SLA Respond Passed metric

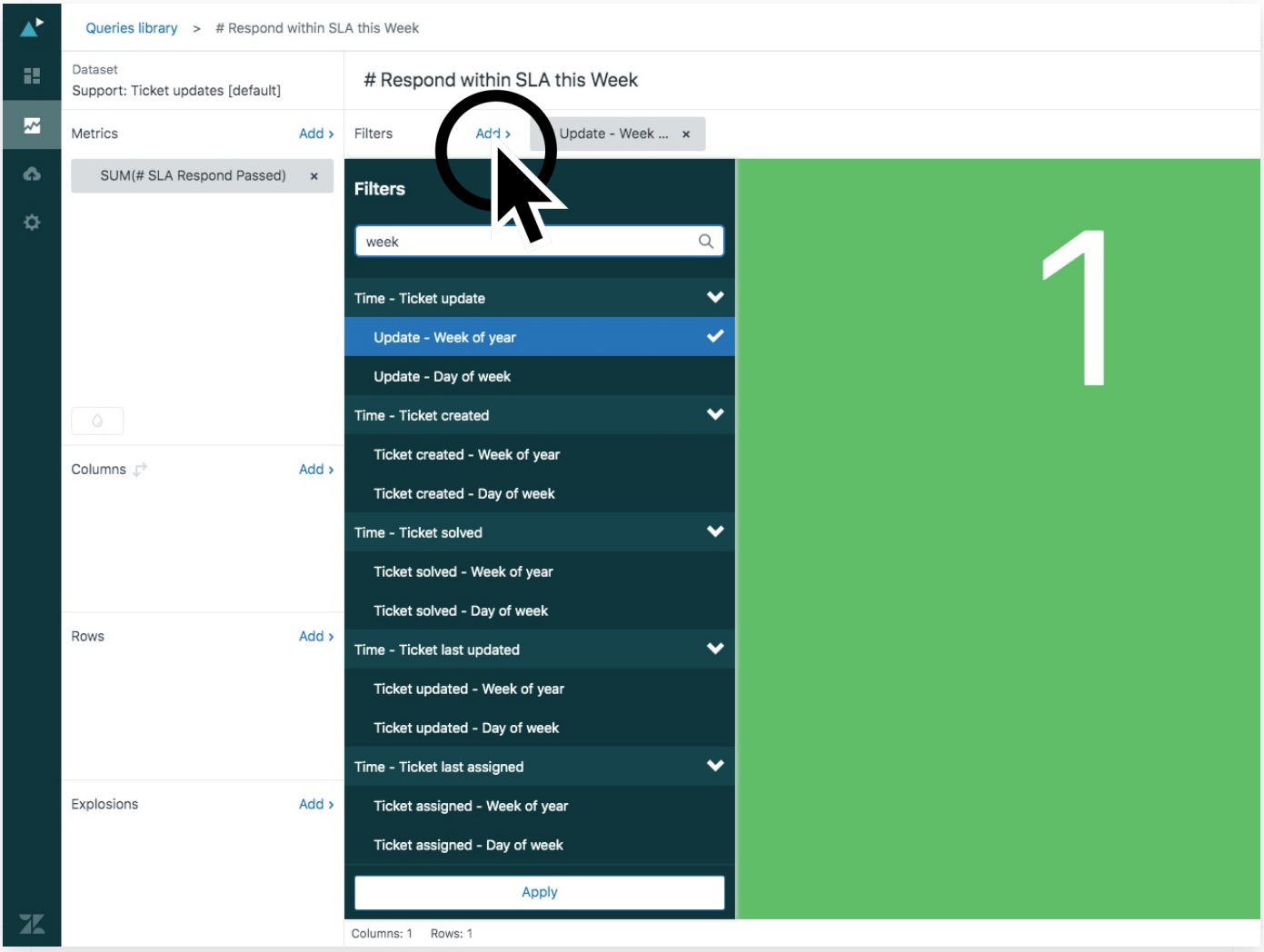

Queries library > # Respond within SLA this Week
Dataset
Support: Ticket updates [default]
Respond within SLA this Week
Metrics
Add ›
Filters
Add ›
Update - Week ...
SUM(# SLA Respond Passed)
Metrics
A metric is a numeric value that you want to measure, like number of tickets.
Search
Calculated metrics
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 ›
1
Columns: 1
Rows: 1



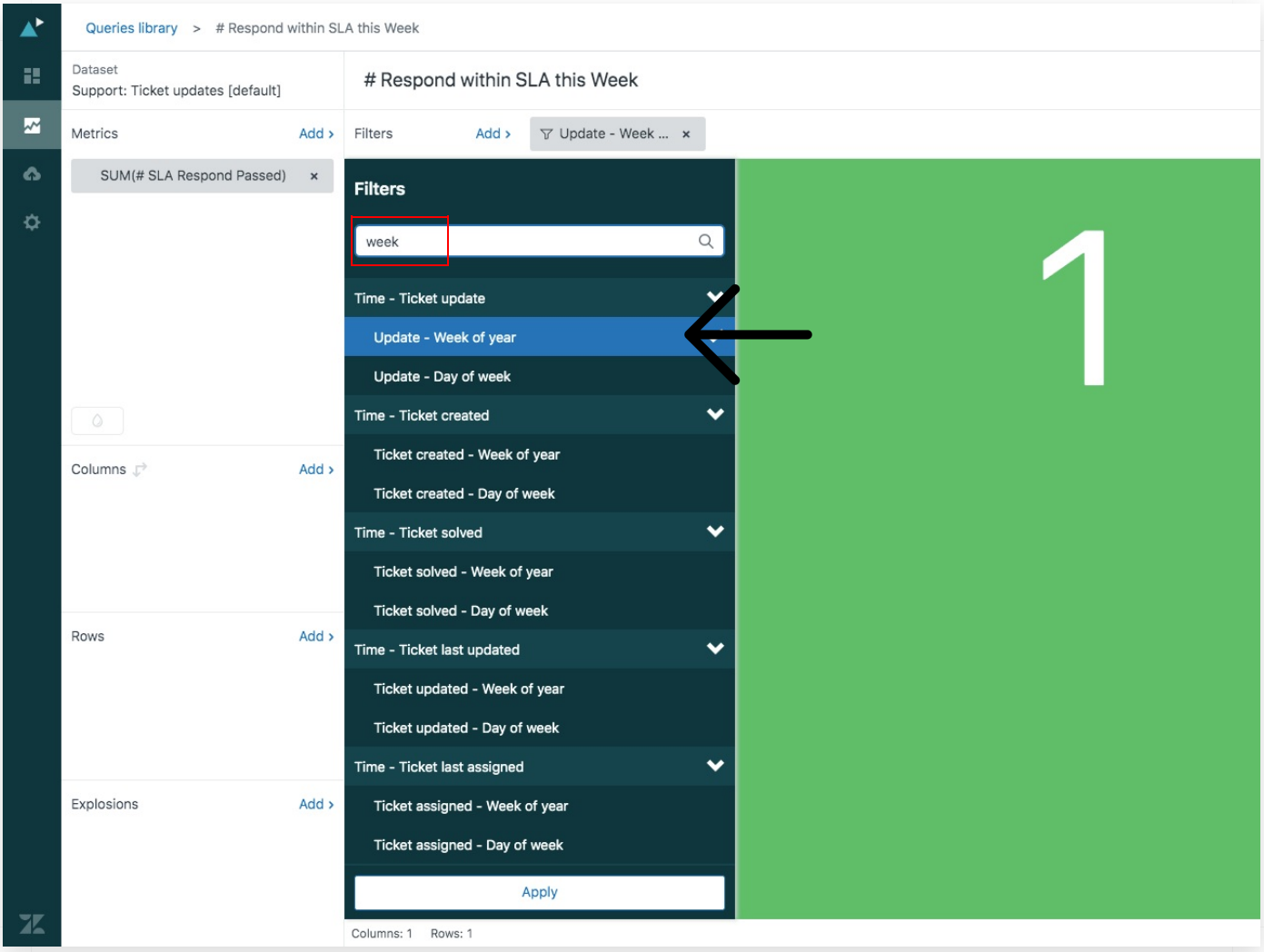
The visualisation type for this query, should be set as KPI



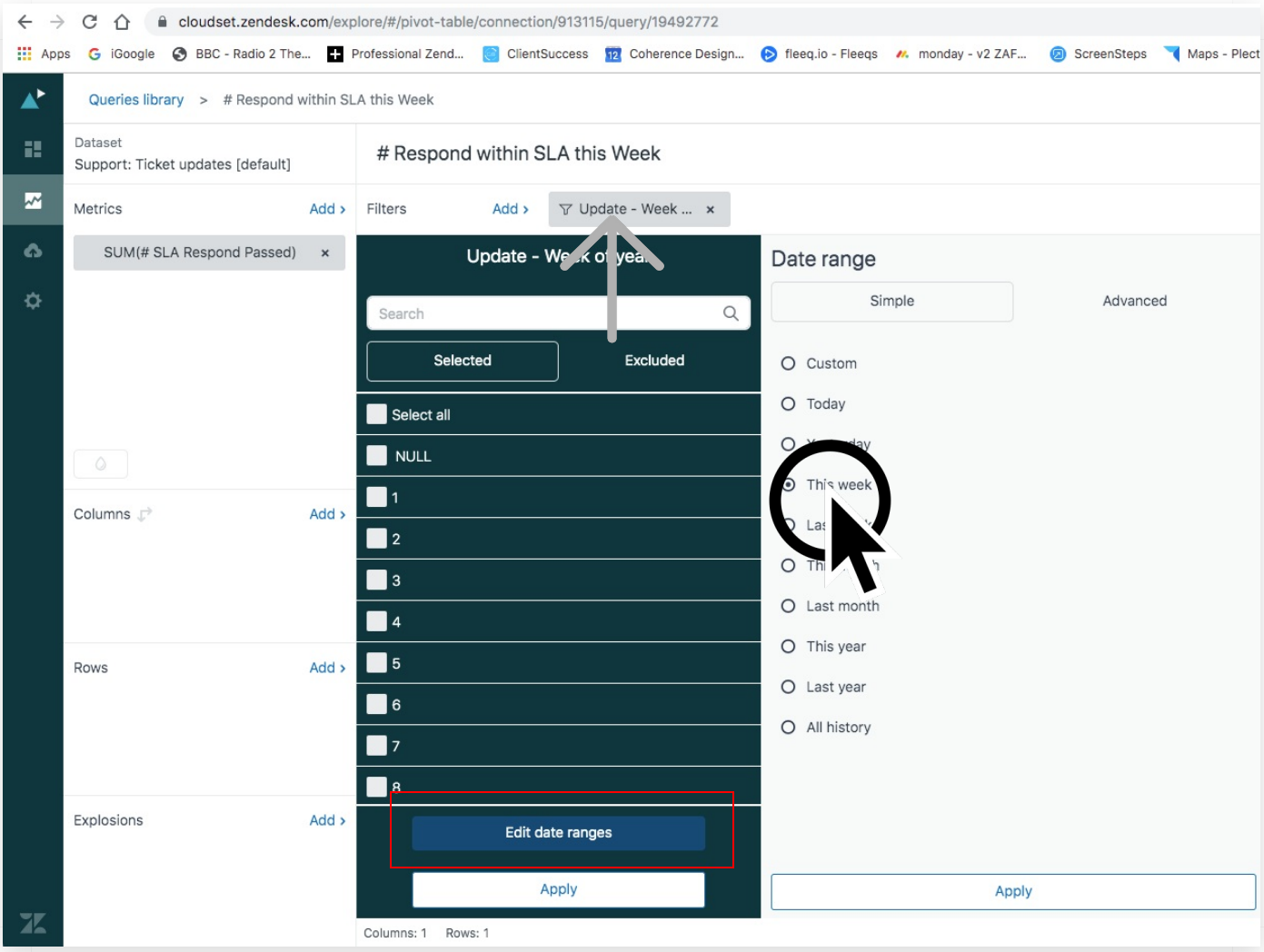
Set the background colour for the query, and make any other required configurations



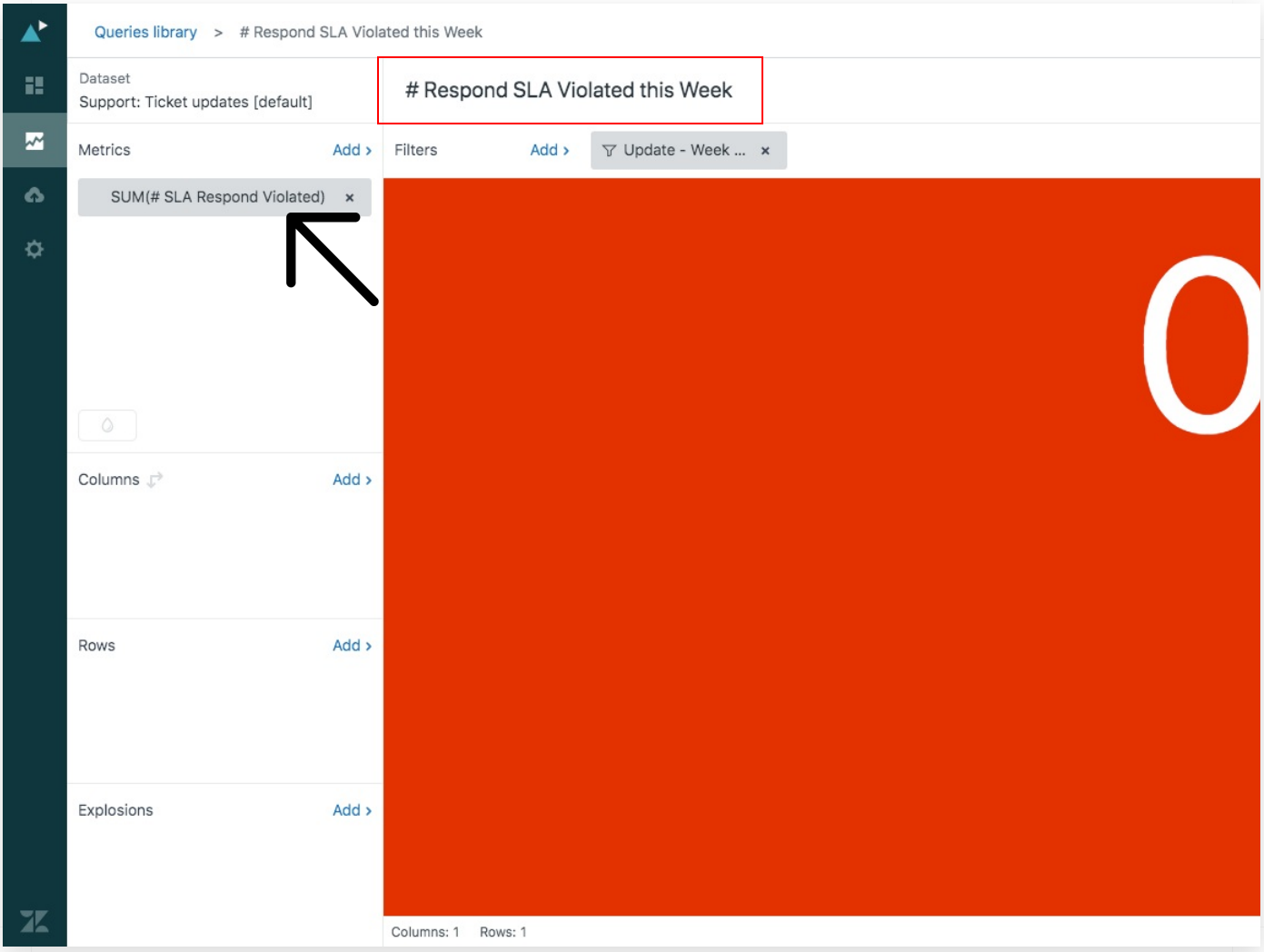
In this example dashboard, the SLA performance is reported in the current week, month and year. So, in order to achieve this, a separate query is required for each period, using a filter based on the date the update occurred



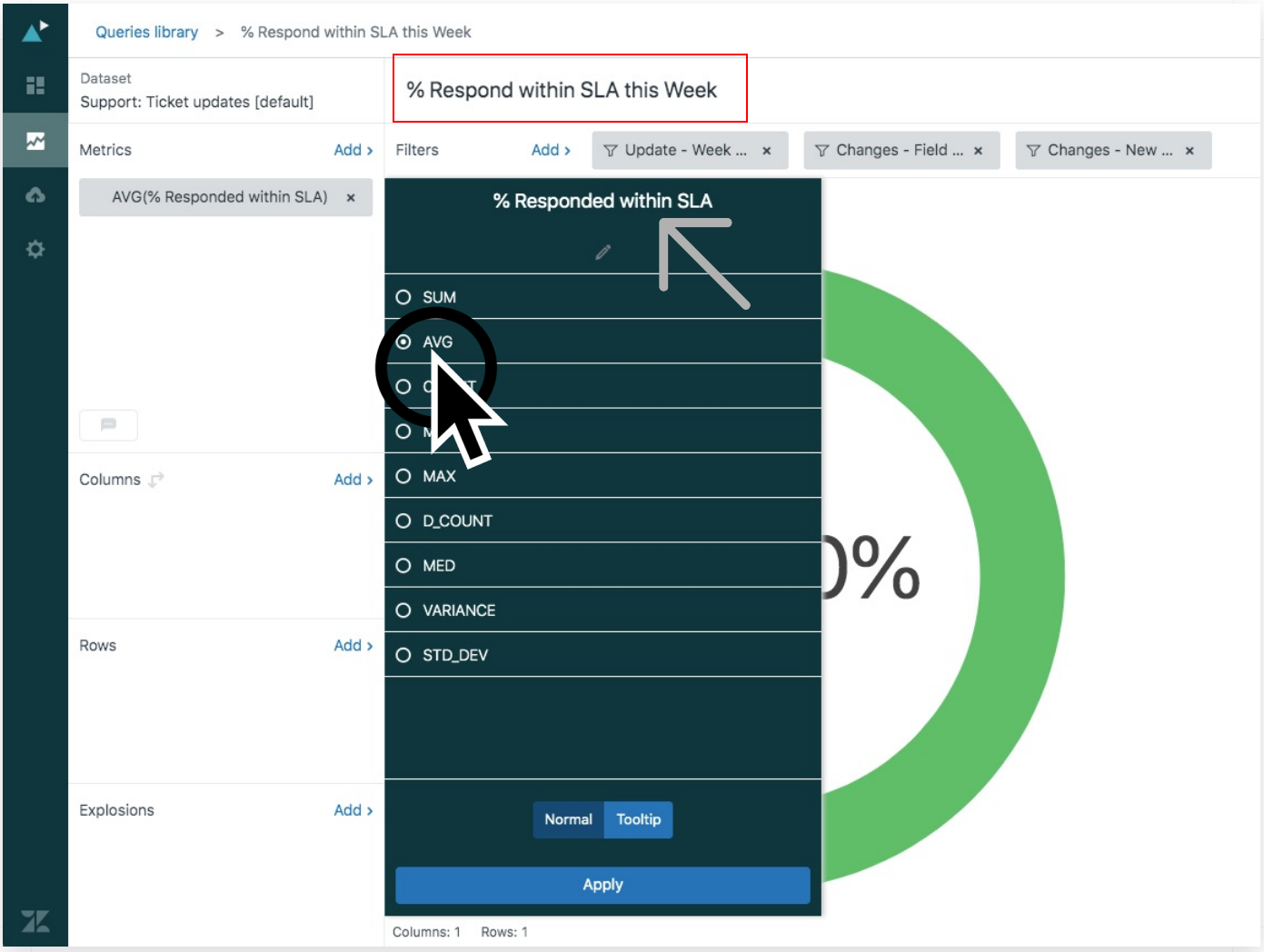
Add a filter using the Update - Week of year attribute



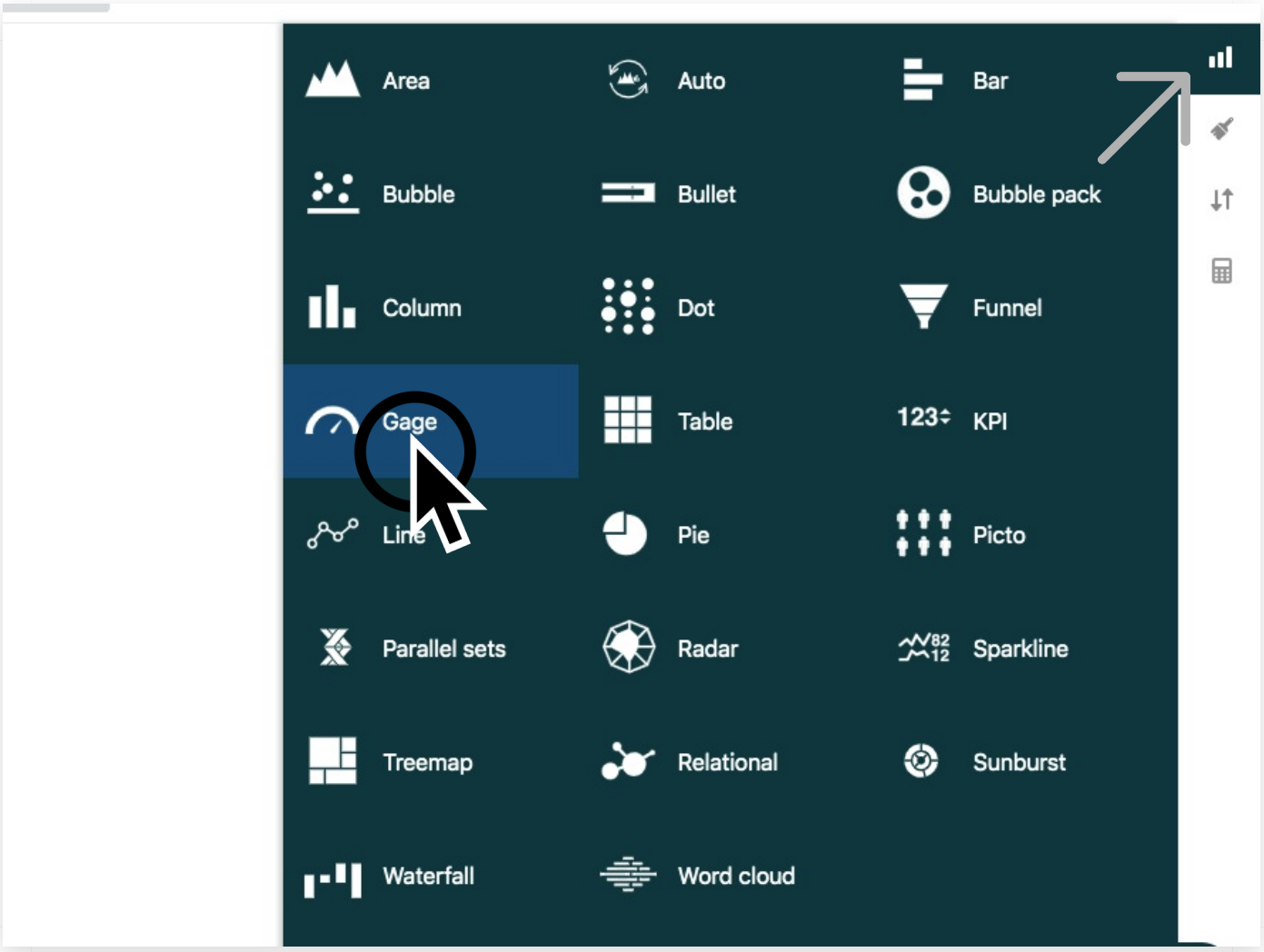
Then select the created filter, and choose this week, from the available date ranges



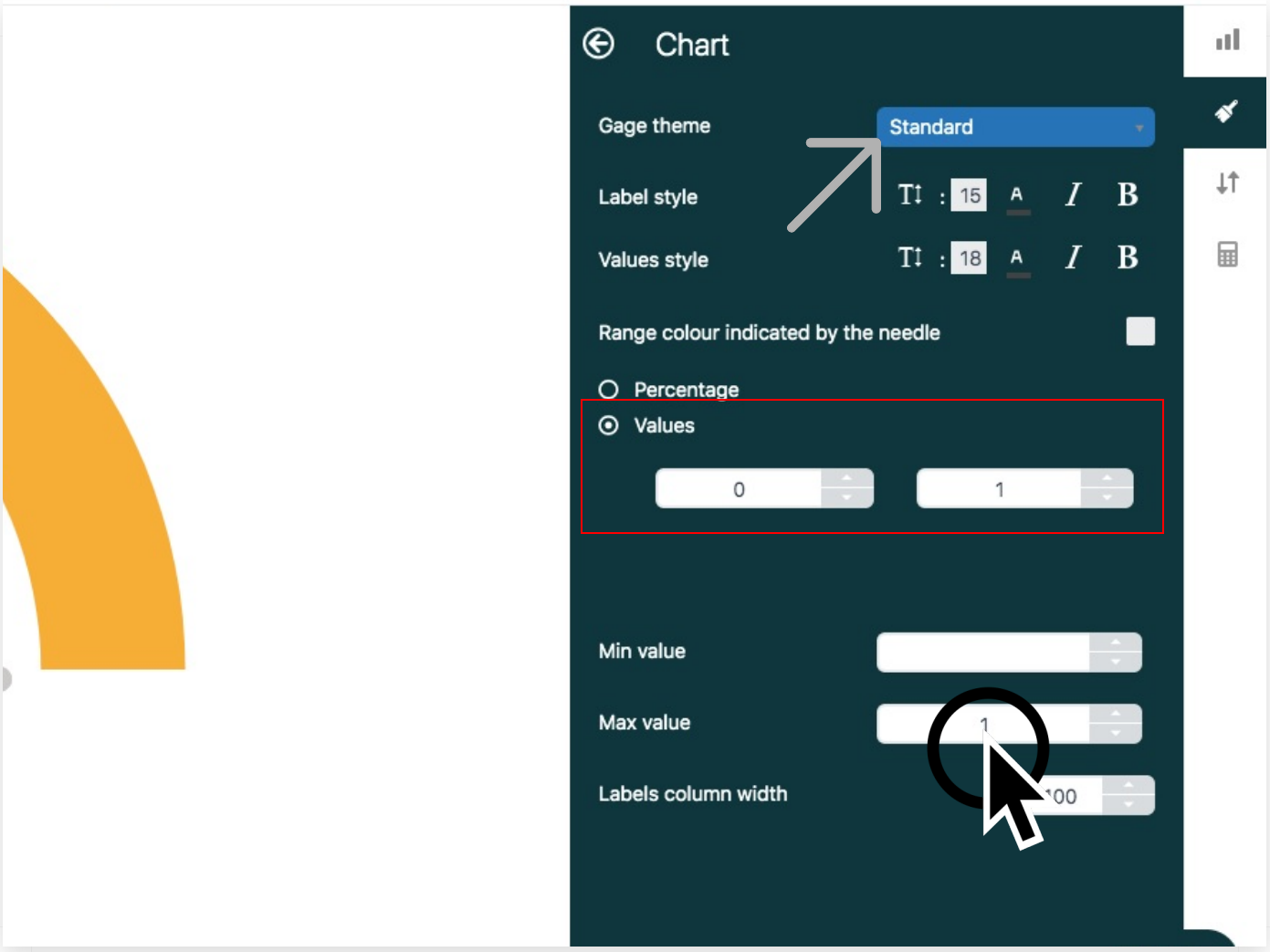
Create a second KPI query, using the number of SLA Respond Violated metric



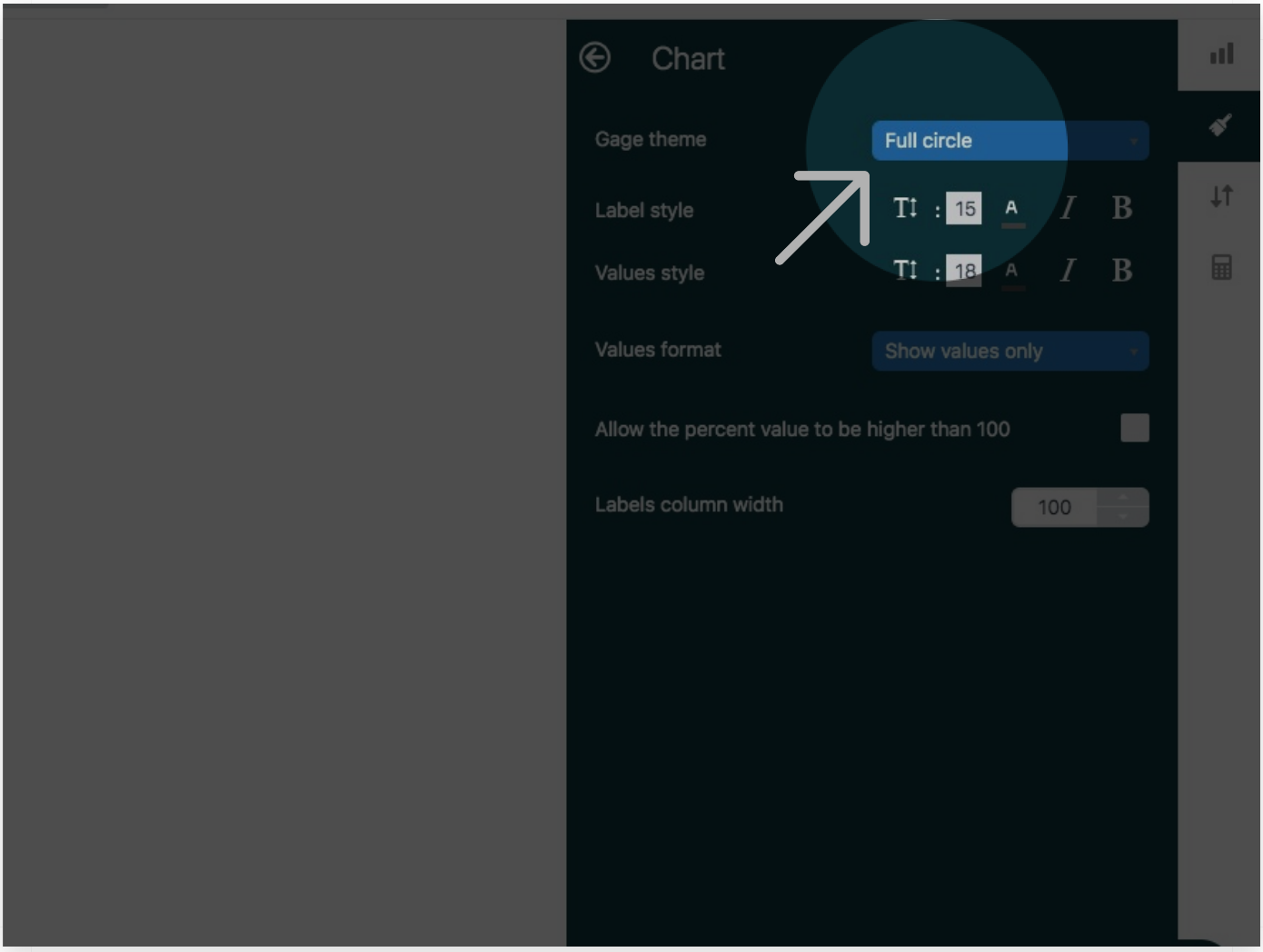
A third query is required, to report on the percentage of initial responds given within the SLA. This is achieved, by averaging the results of the % Responded within SLA metric



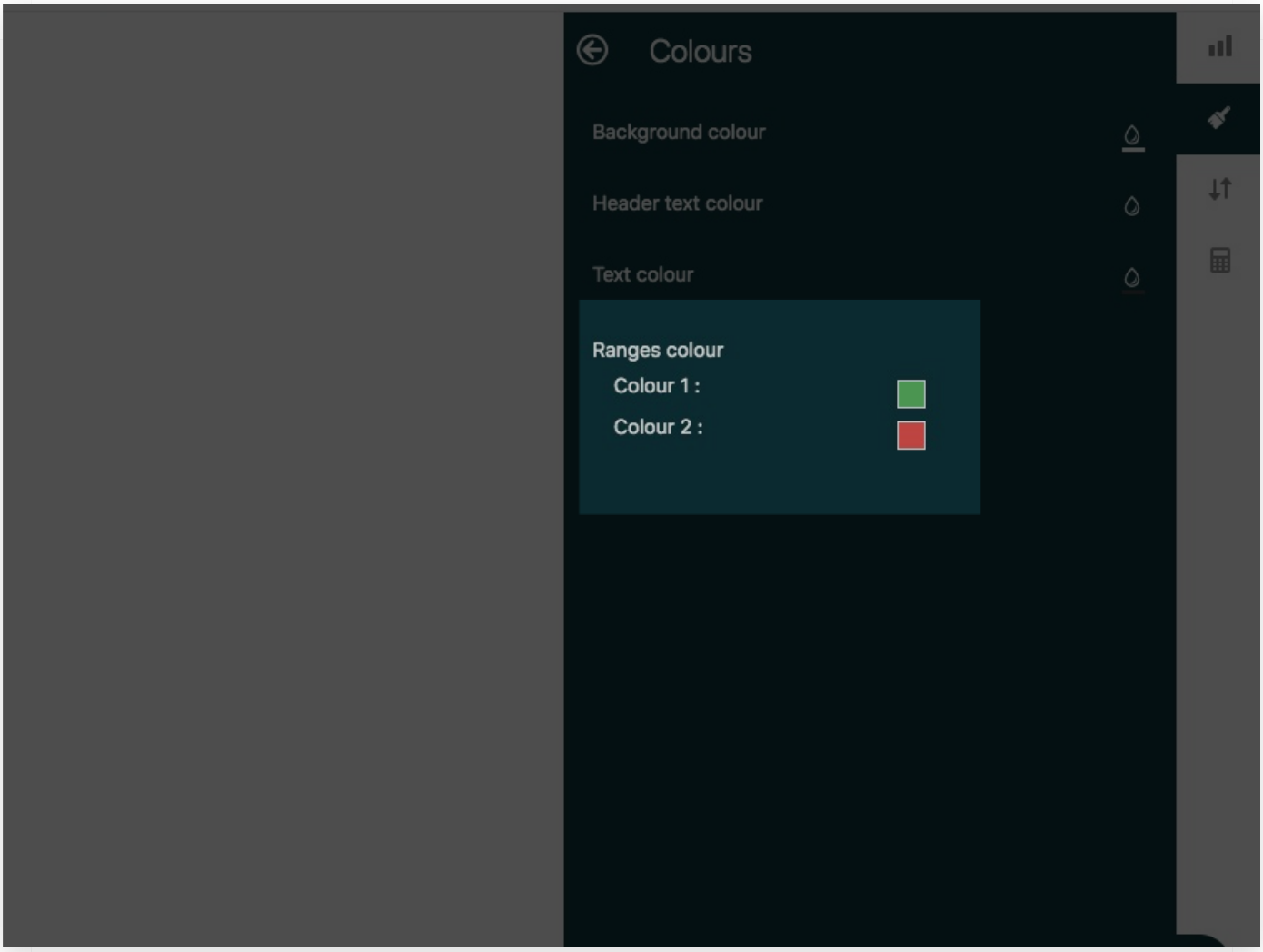
The visualisation type for this query, should be set to gauge



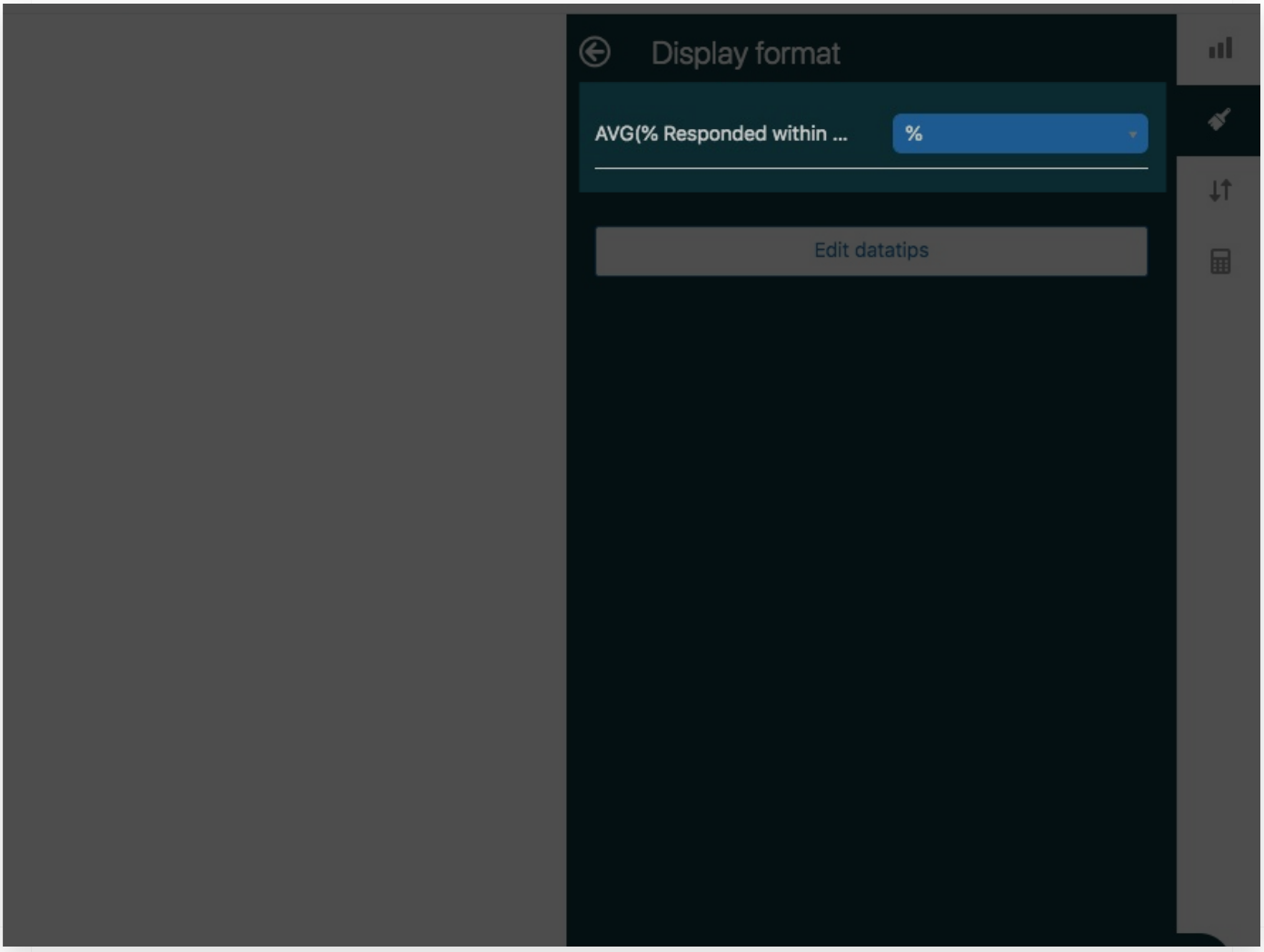
With the Gage theme set to Standard in the chart settings, ensure the Values are set as zero and 1, and the max value is set to 1



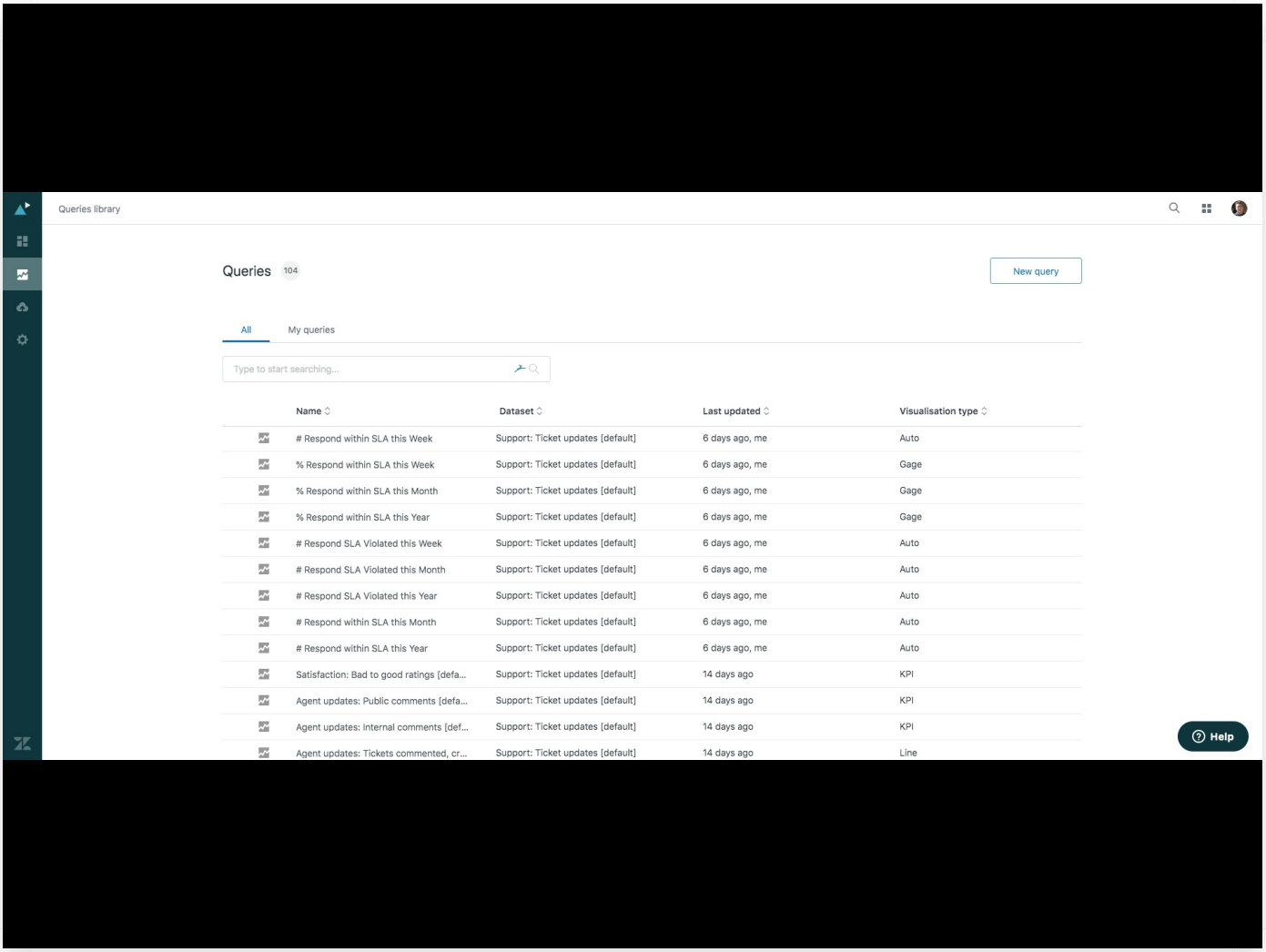
Then change the guage theme, to full circle

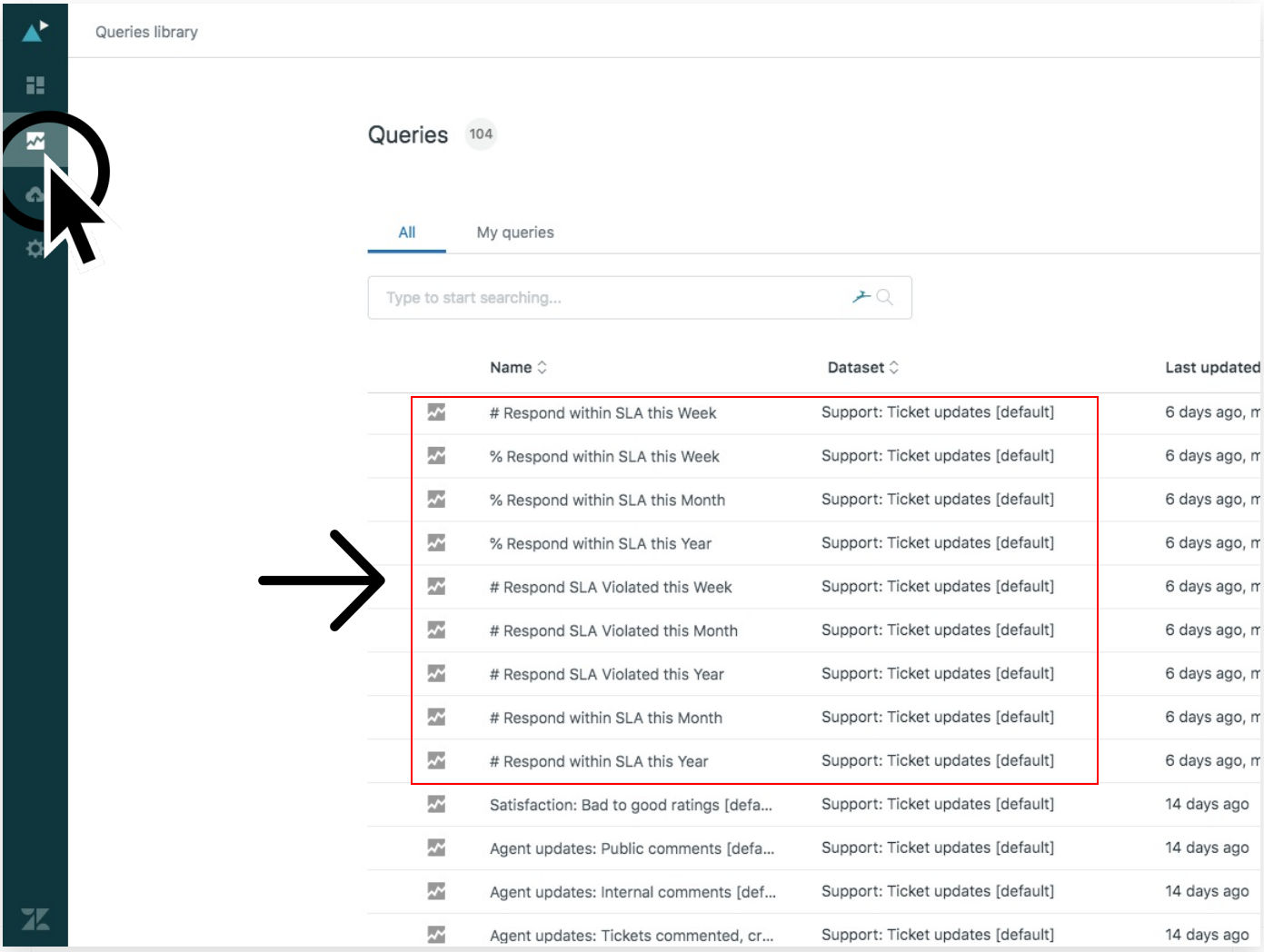


Set the range colours to green and red, representing passed and violated SLA measurements

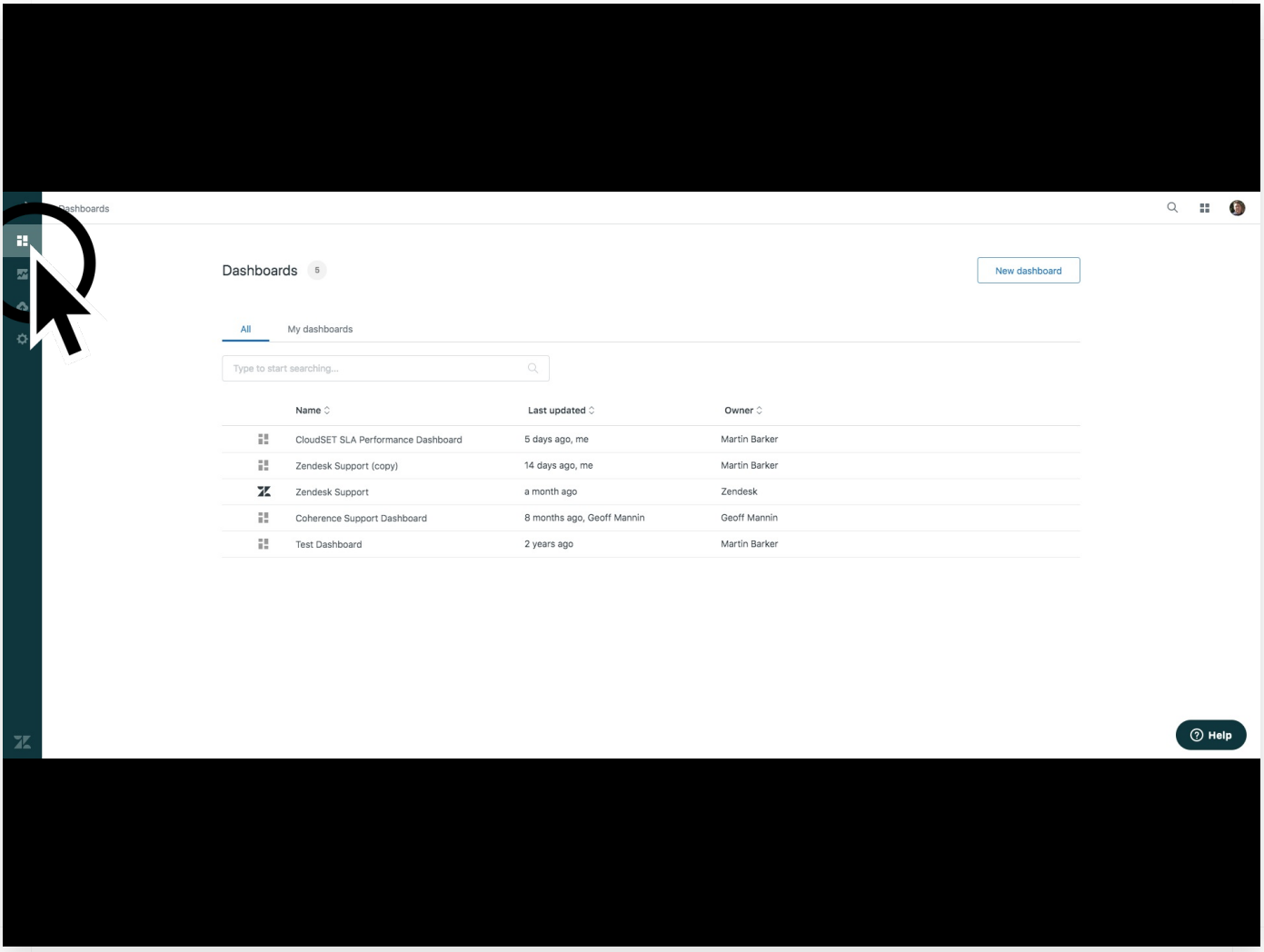


and set the display format to %

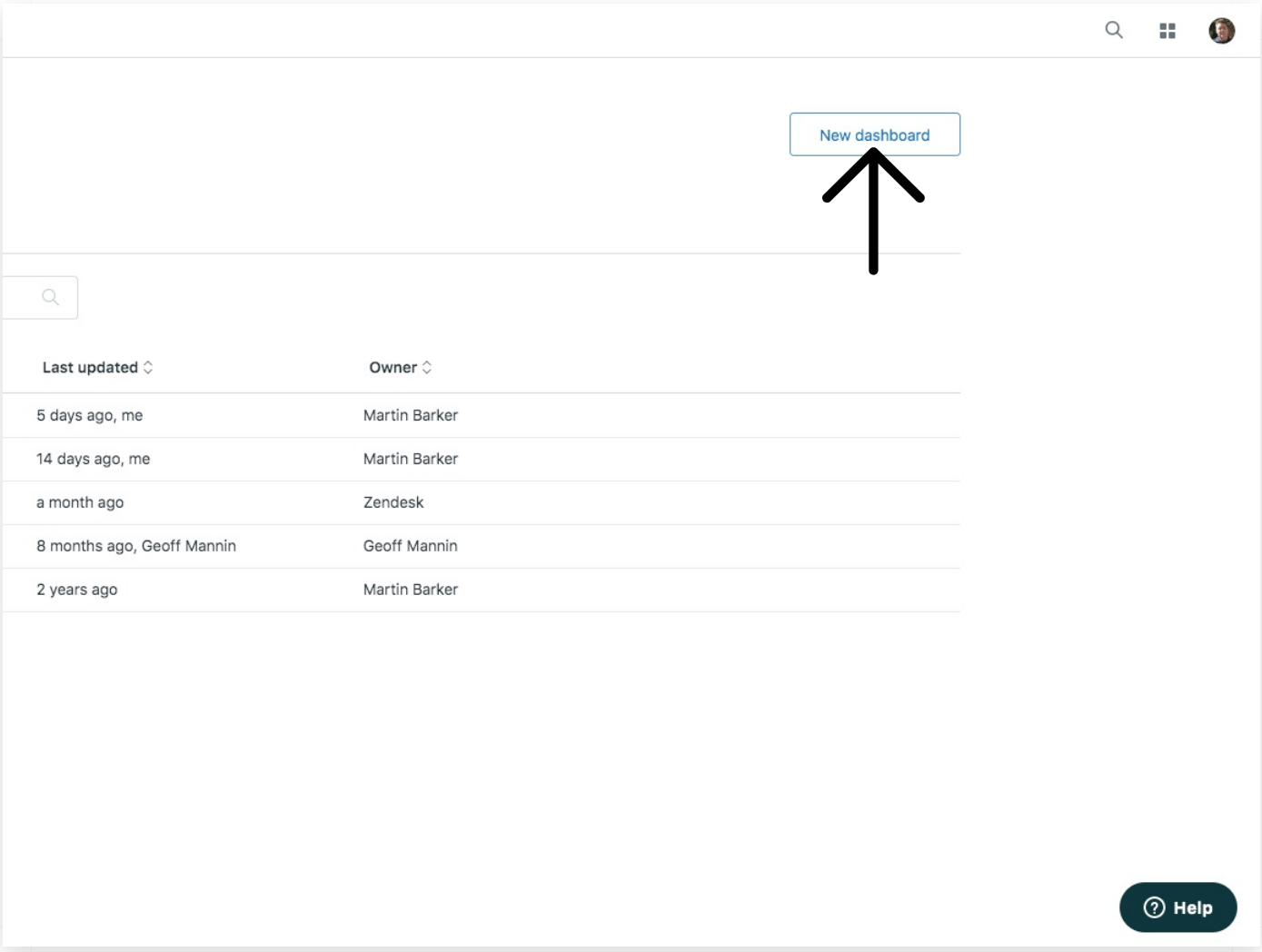

Queries library
Queries 104
New query
All
My queries
Type to start searching...
Name
Dataset
Last updated
Visualisation type
Respond within SLA this Week
Support: Ticket updates [default]
6 days ago, me
Auto
% Respond within SLA this Week
Support: Ticket updates [default]
6 days ago, me
Gage
% Respond 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



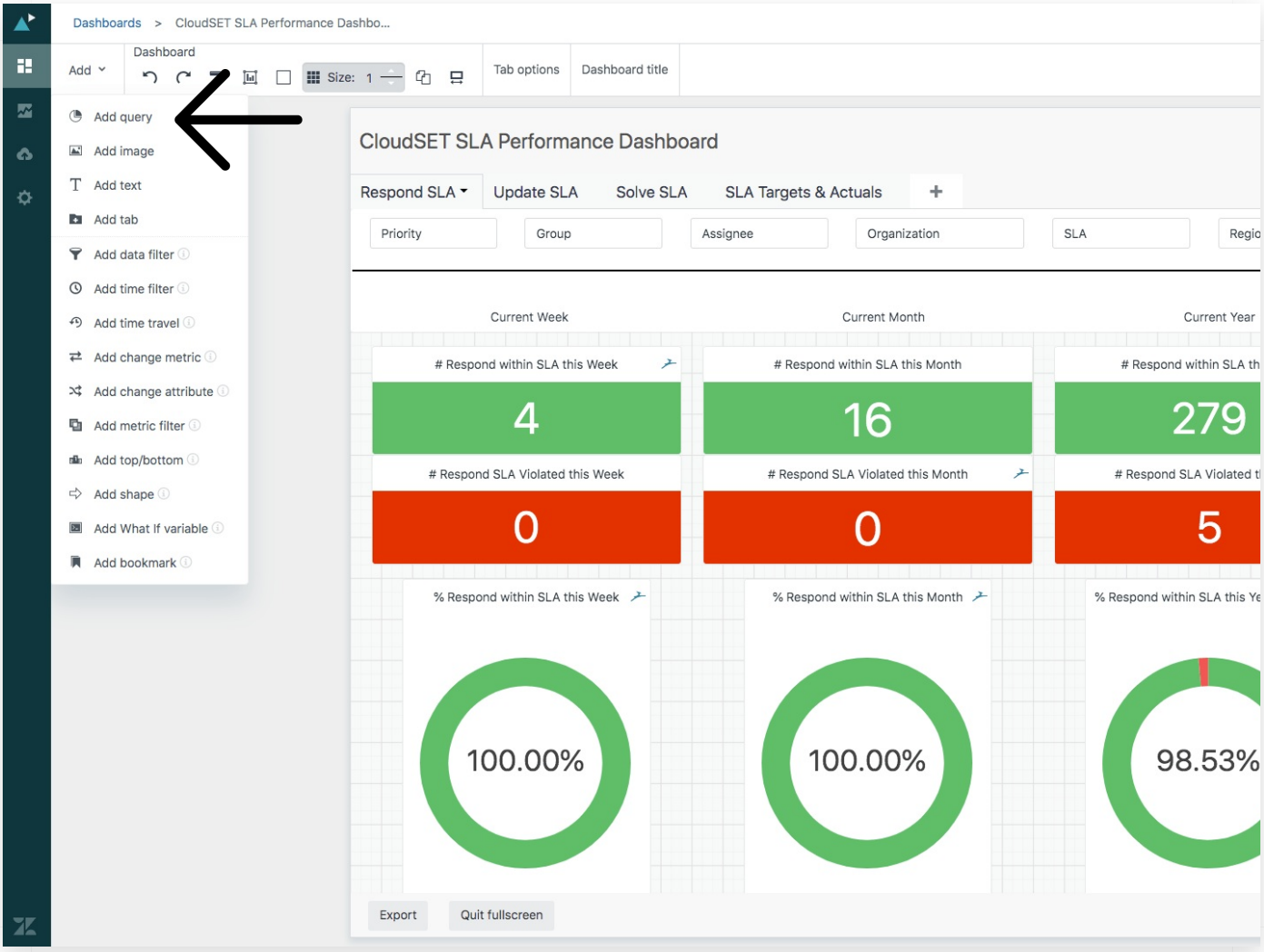
Clone the three queries and adjust the filters, to create corresponding queries for the current month and current year



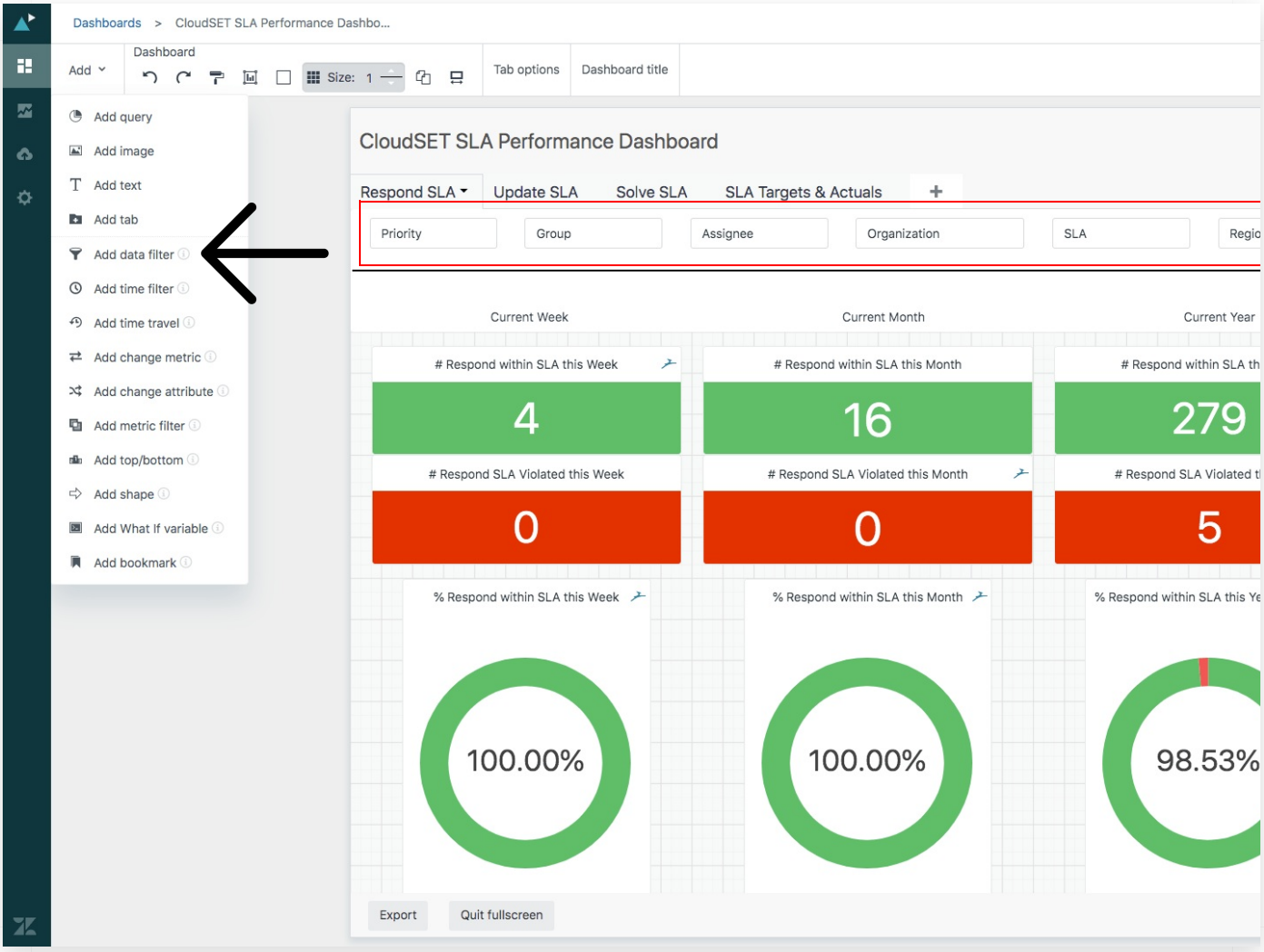
The queries are now ready for inclusion within the example dashboard



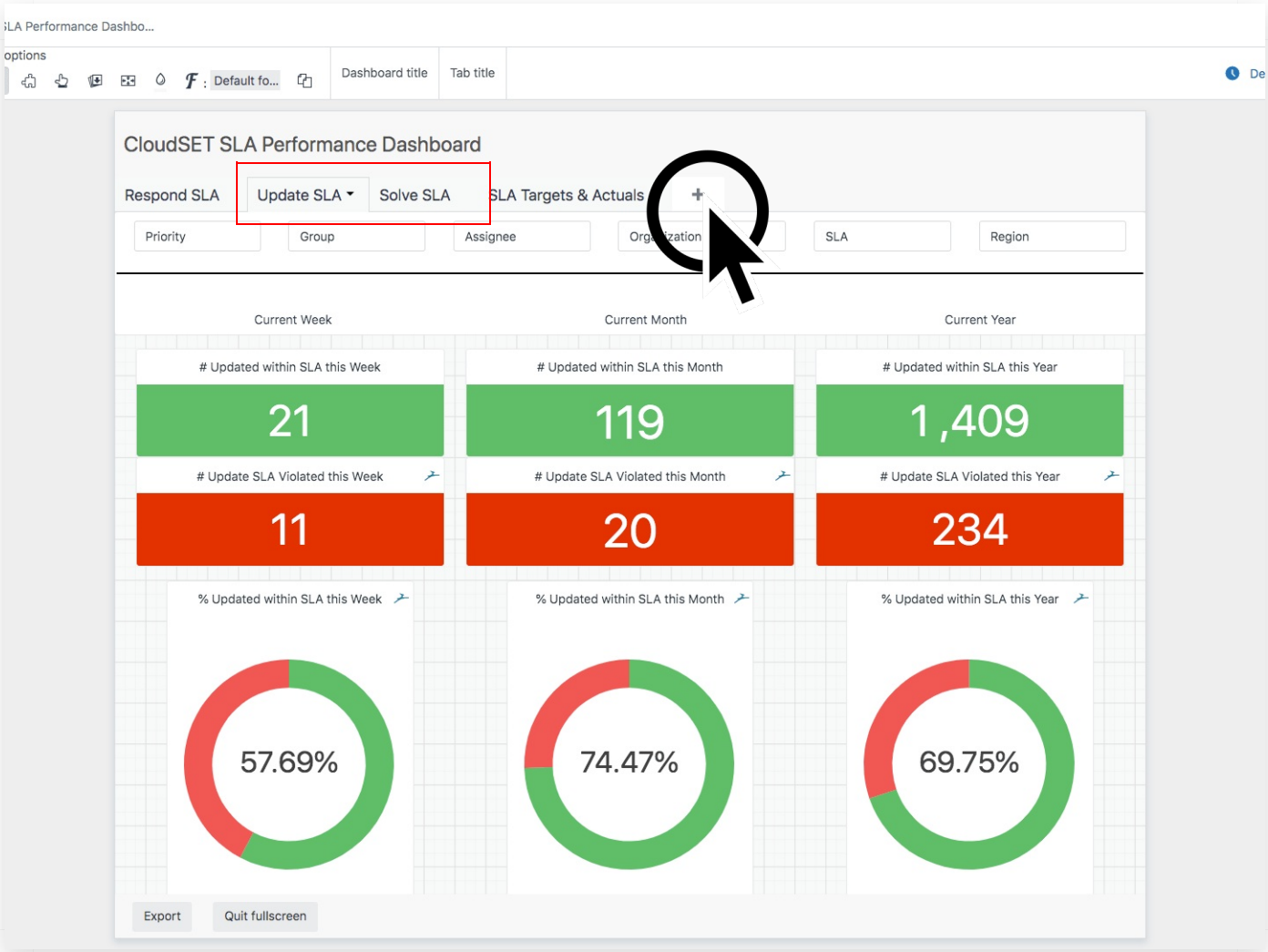
Select the option to add a new dashboard



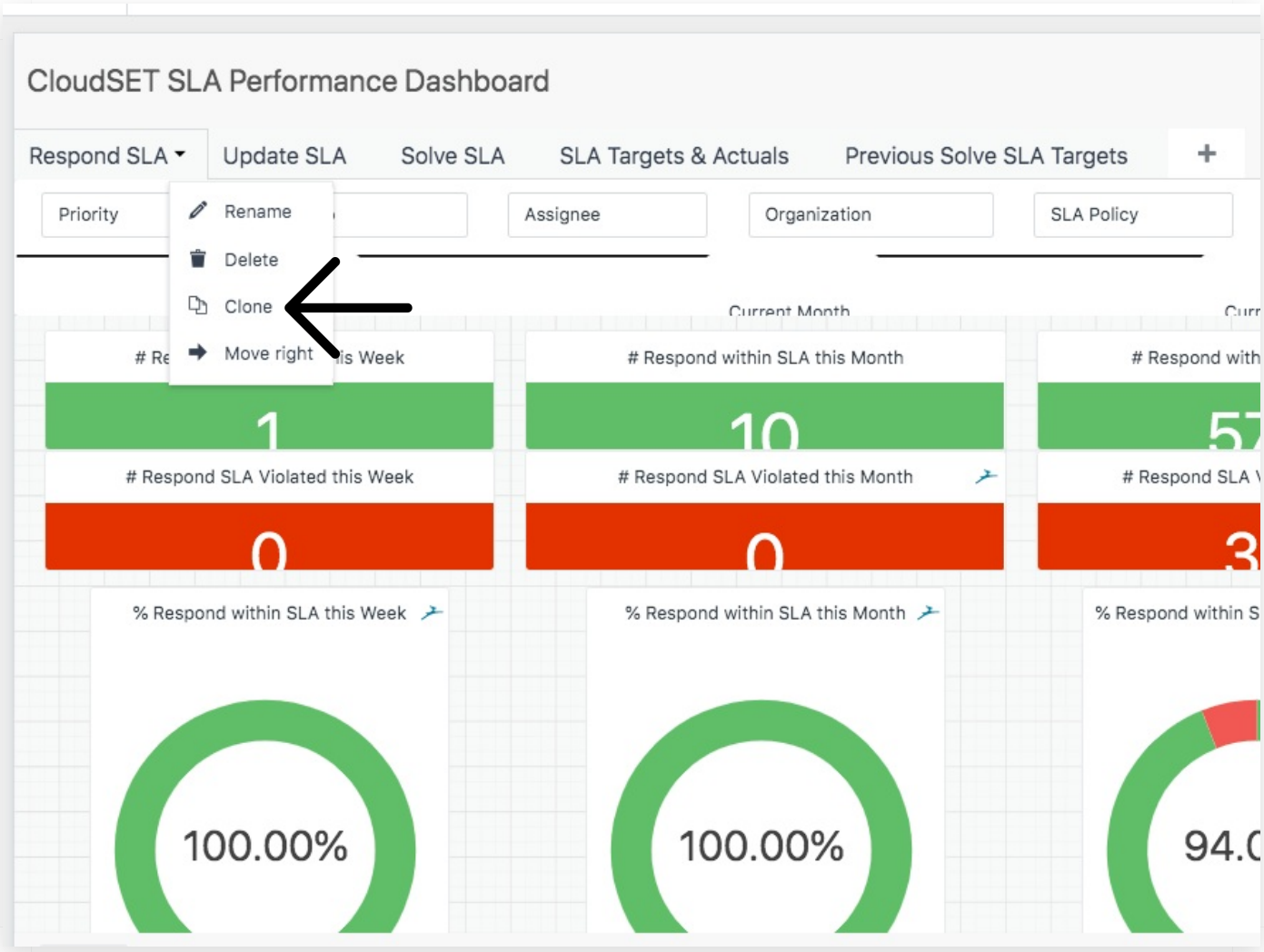
Locate and add each of the queries, resize and position them on the dashboard



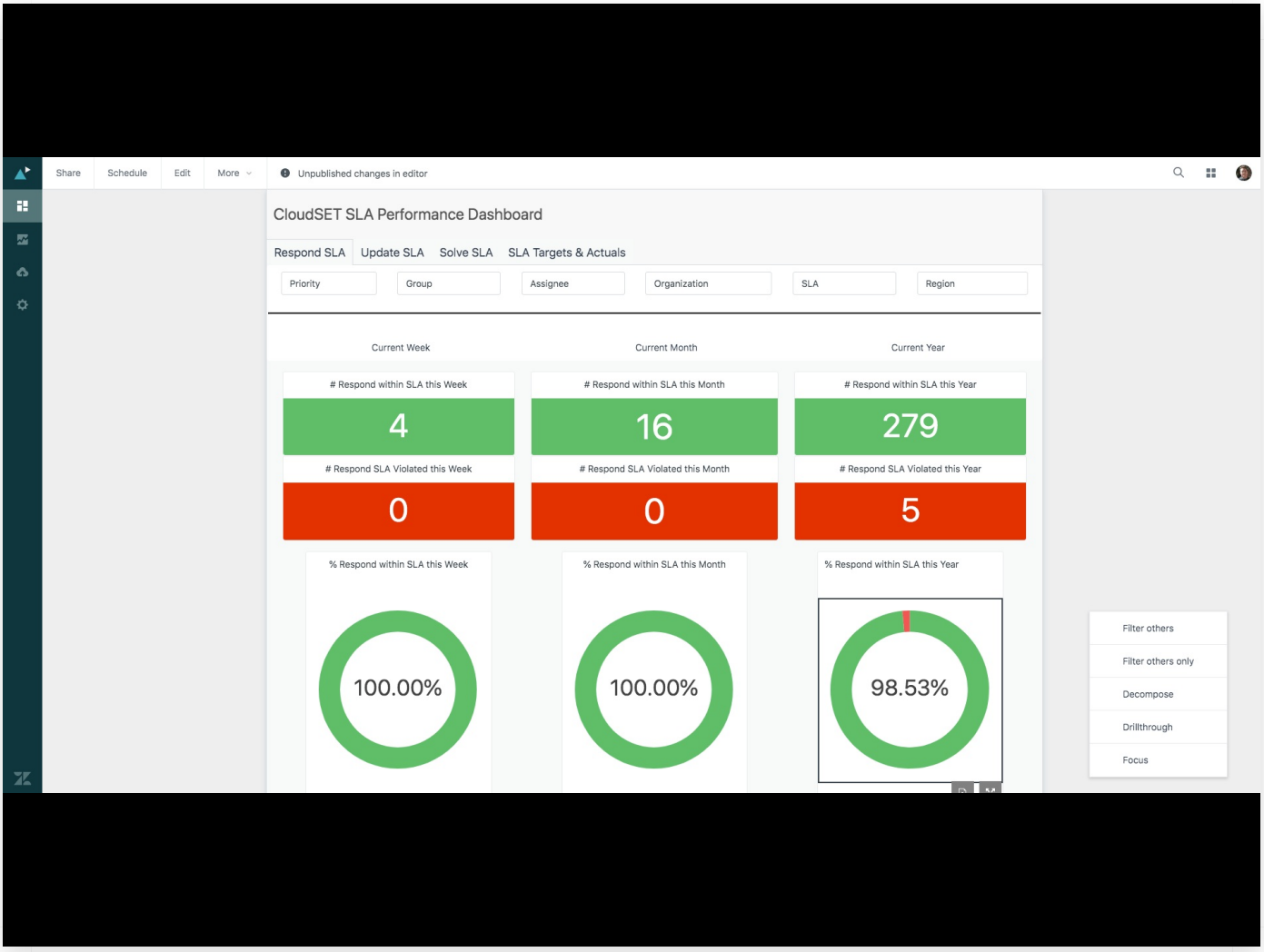
If required, add filters to the dashboard, to refine the results based on alternative classifications, assignees, groups, customers, etc.

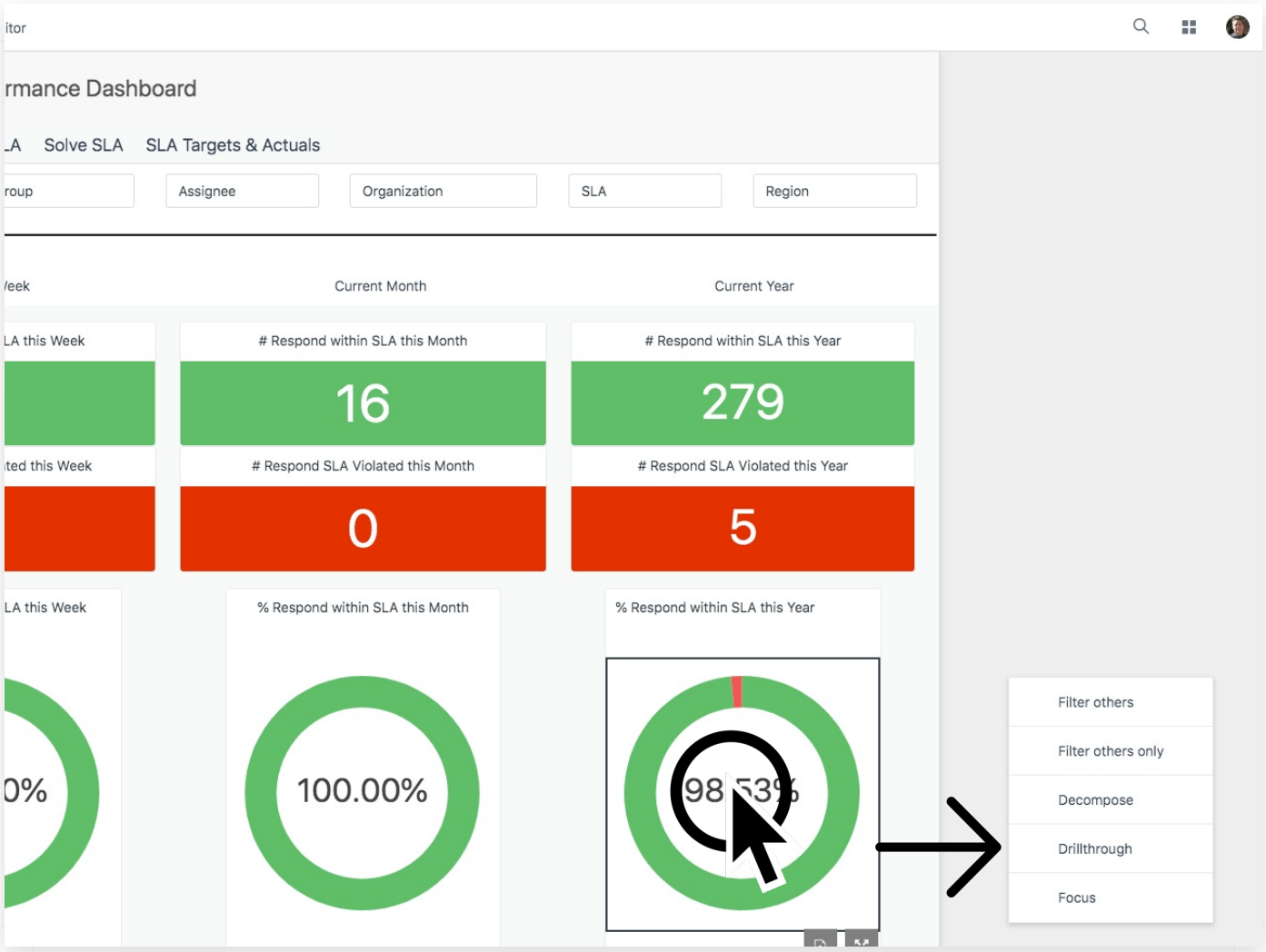


Now clone each of the calculated attributes, calculated metrics, and queries, for each of the events measured as part of your SLA setup, and introduce to the example dashboard in tabs

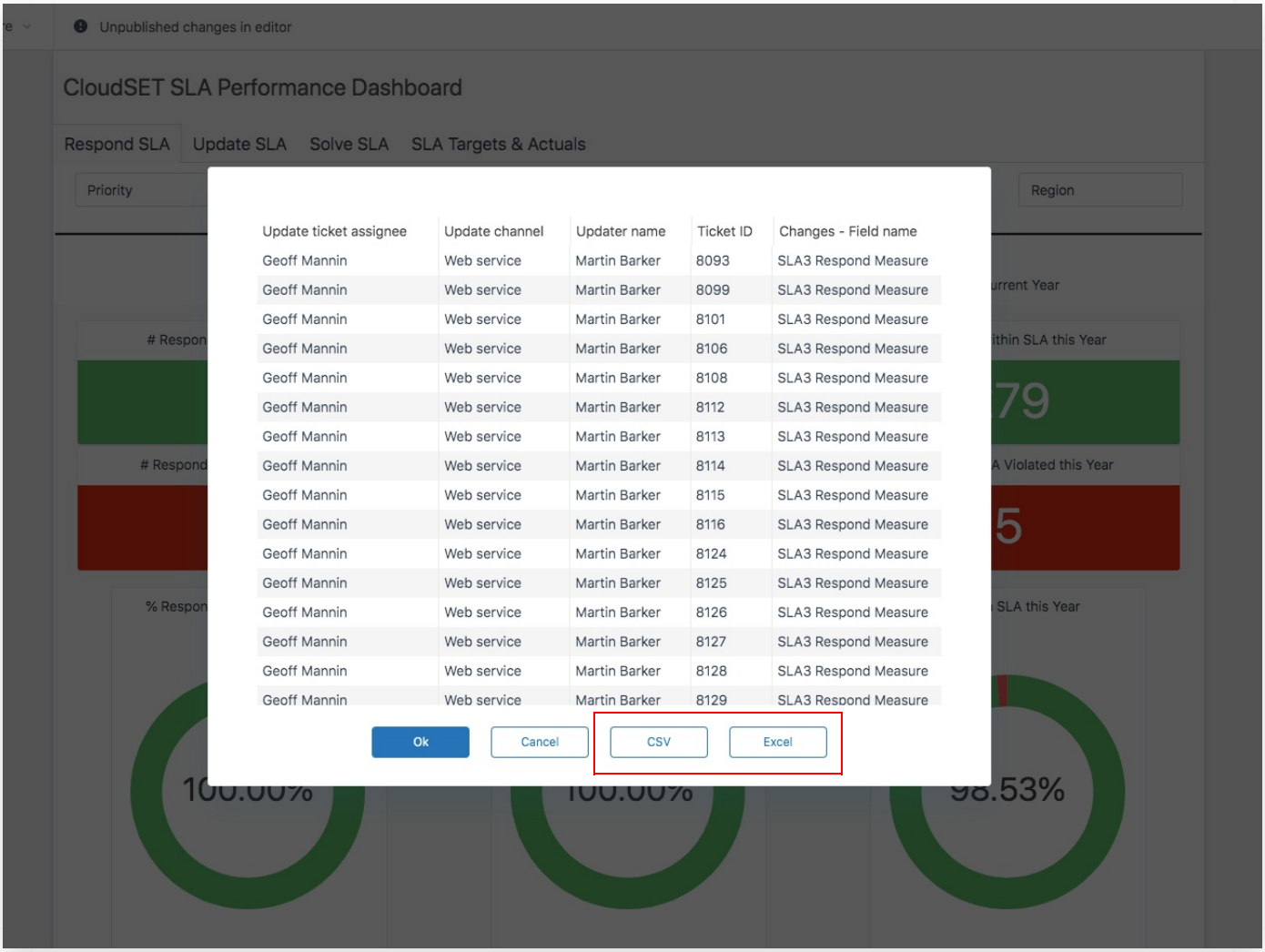


It can be useful to clone an existing tab, to inherit the headings, labels, filters, and any other reusable components

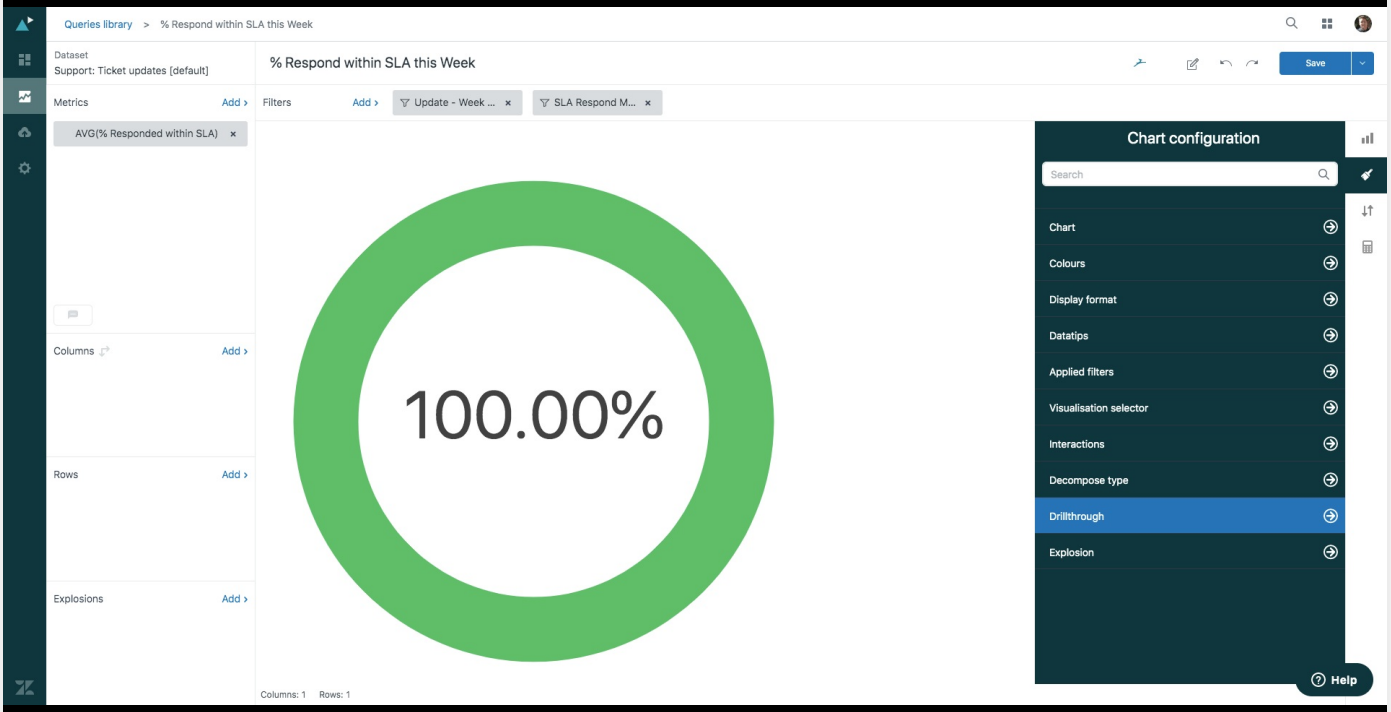

Share
Schedule
Edit
More
Unpublished changes in editor
CloudSET SLA Performance Dashboard
Respond SLA
Update SLA
Solve SLA
SLA Targets & Actuals
Priority
Group
Assignee
Organization
SLA
Region
Current Week
Current Month
Current Year
Respond within SLA this Week
4
Respond within SLA this Month
16
Respond within SLA this Year
279
Respond SLA Violated this Week
0
Respond SLA Violated this Month
0
Respond SLA Violated this Year
5
% Respond within SLA this Week
100.00%
% Respond within SLA this Month
100.00%
% Respond within SLA this Year
98.53%
Filter others
Filter others only
Decompose
Drillthrough
Focus

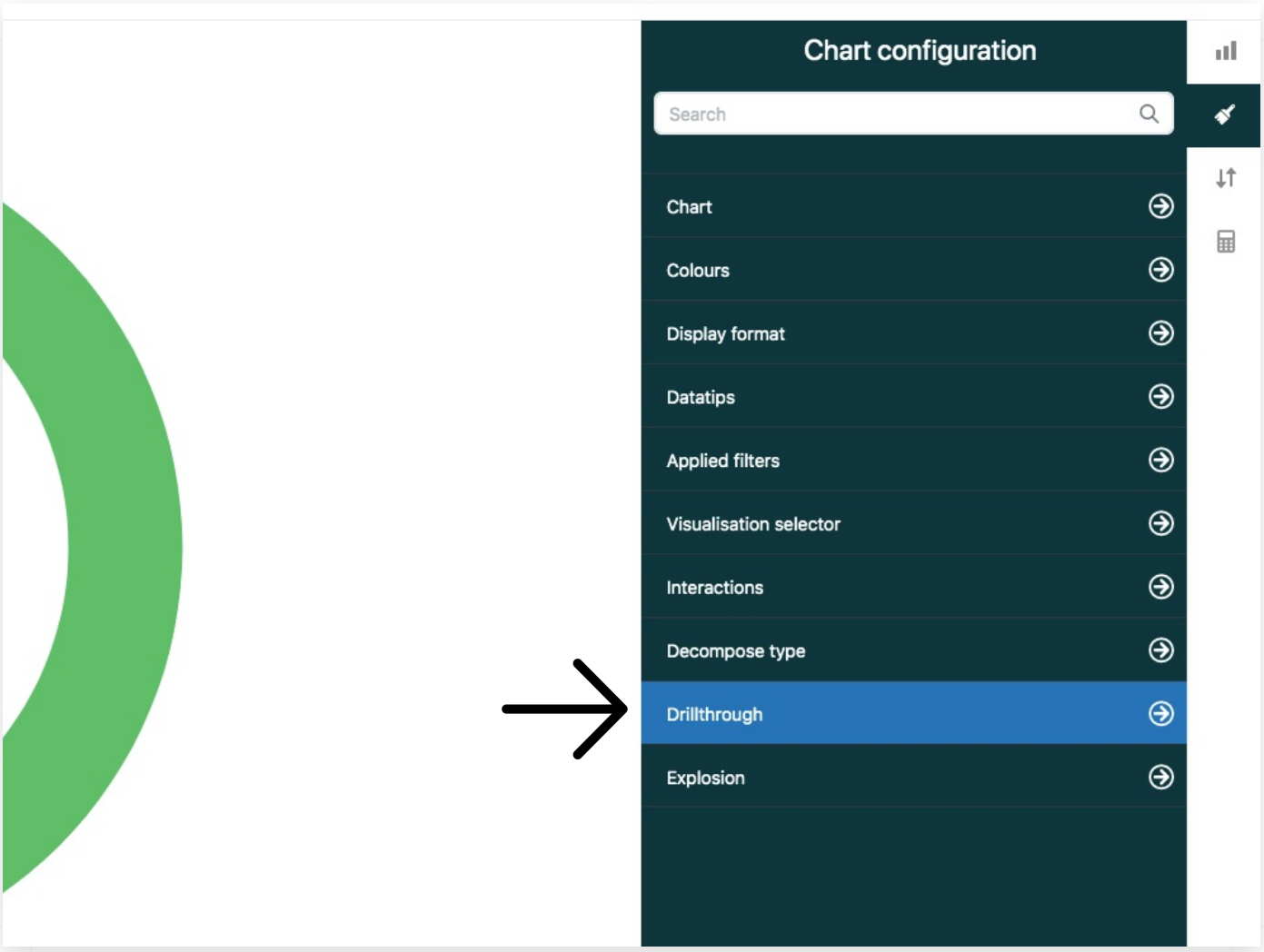


For certain visualisation types such as the gauge, it is possible to drillthrough into the data used in the query, by clicking on the headline value

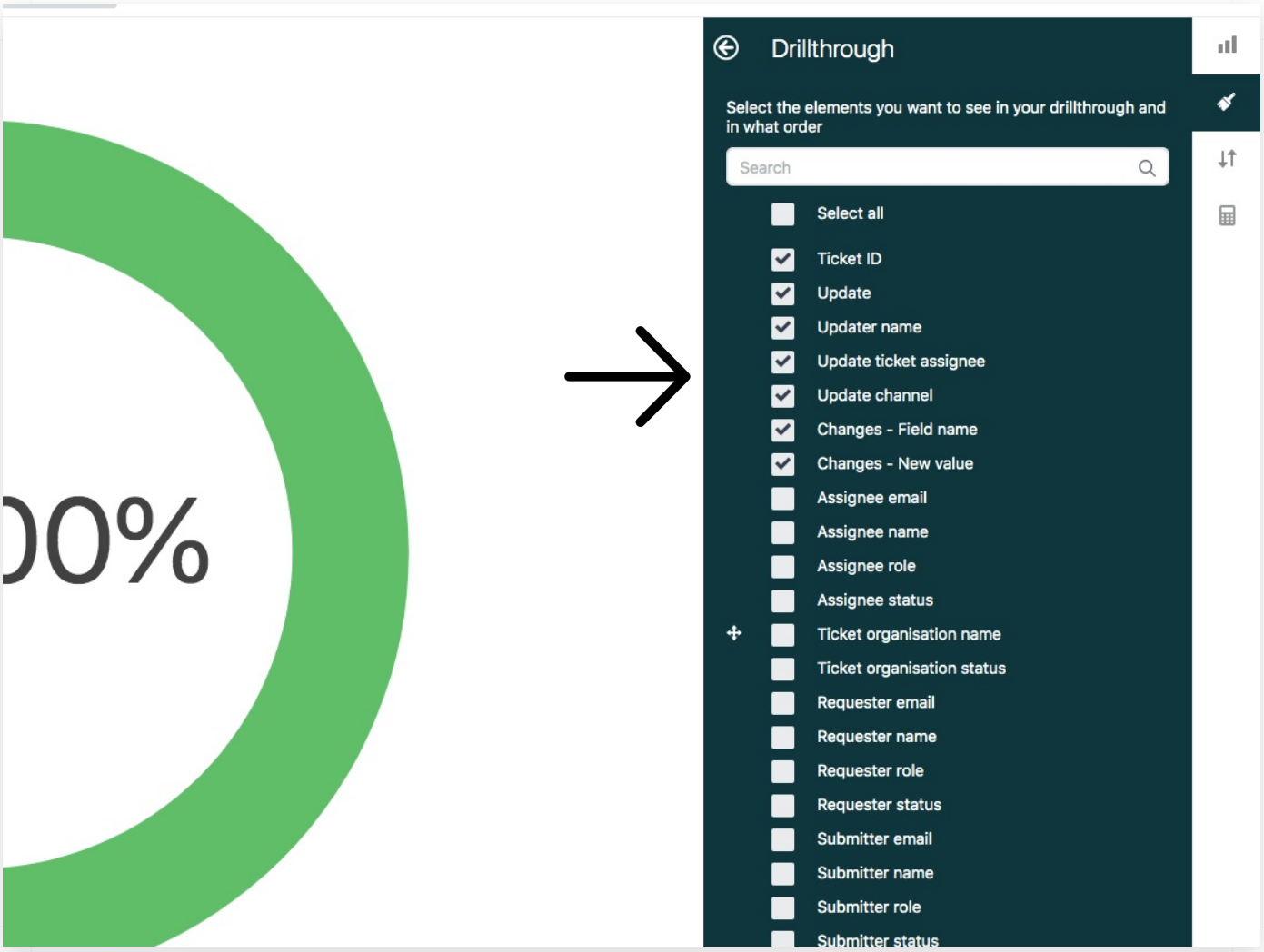


and the tabular based results can be exported in CSV or Excel format

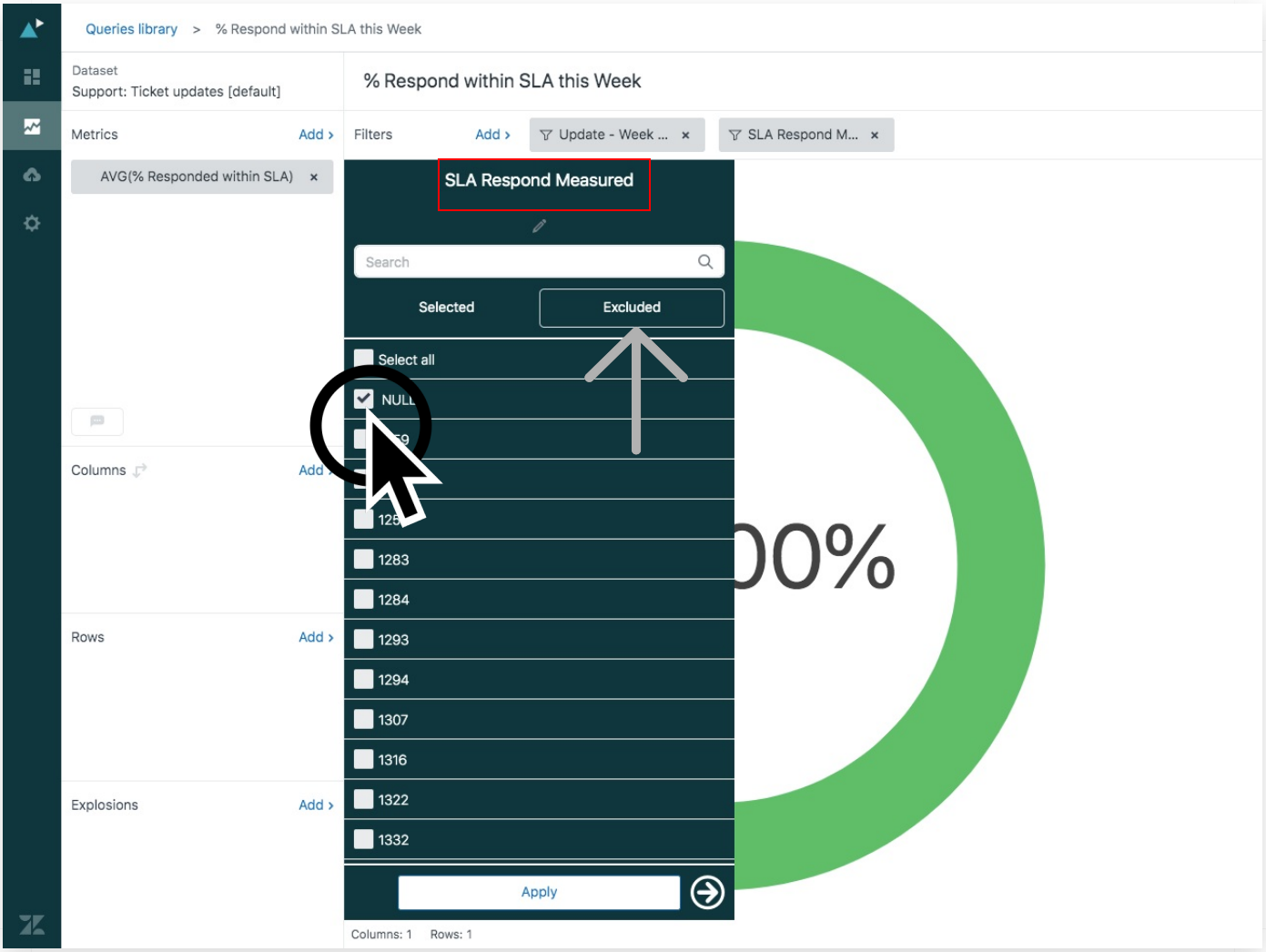

Queries library > % Respond within SLA this Week
Dataset
Support: Ticket updates [default]
% Respond within SLA this Week
Save
Metrics
Add ›
Filters
Add ›
Update - Week ...
SLA Respond M...
AVG(% Responded within SLA)
Columns
Add ›
Rows
Add ›
Explosions
Add ›
100.00%
Columns: 1
Rows: 1
Chart configuration
Search
Chart
Colours
Display format
Datatips
Applied filters
Visualisation selector
Interactions
Decompose type
Drillthrough
Explosion
Help



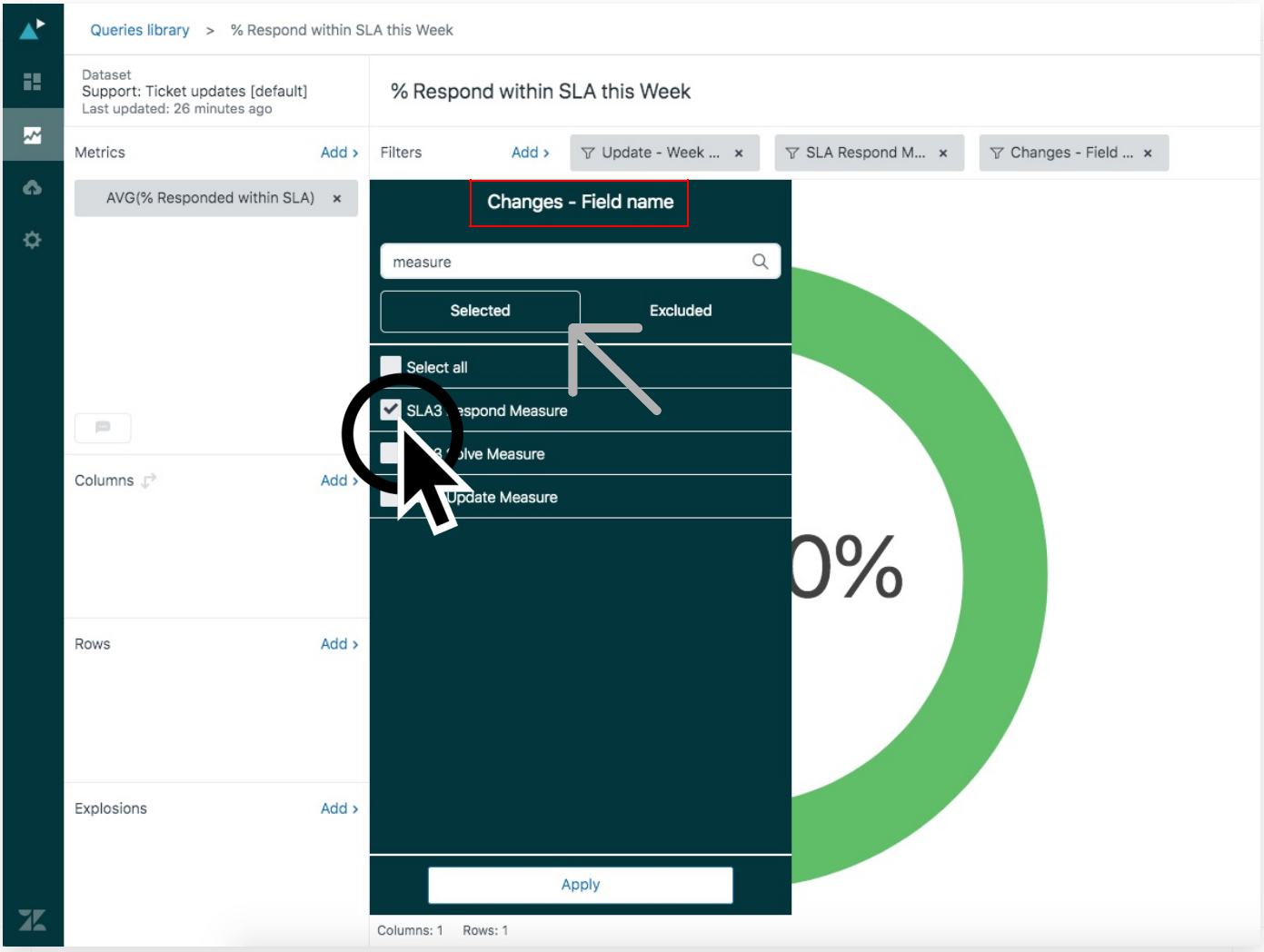
The columns in the drill through can be defined, by editing the associated query definition



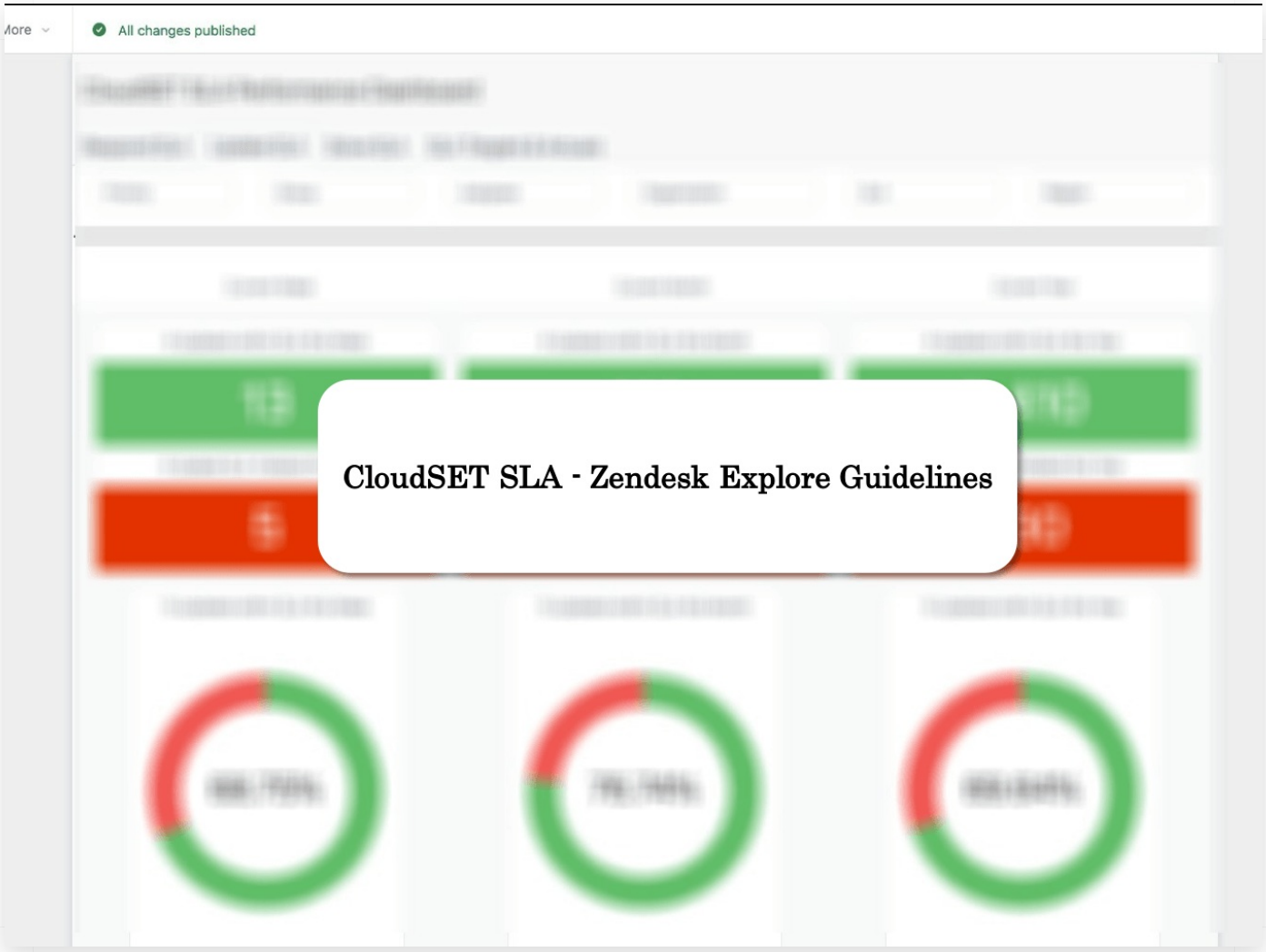
and selecting the fields to be included, from the available list



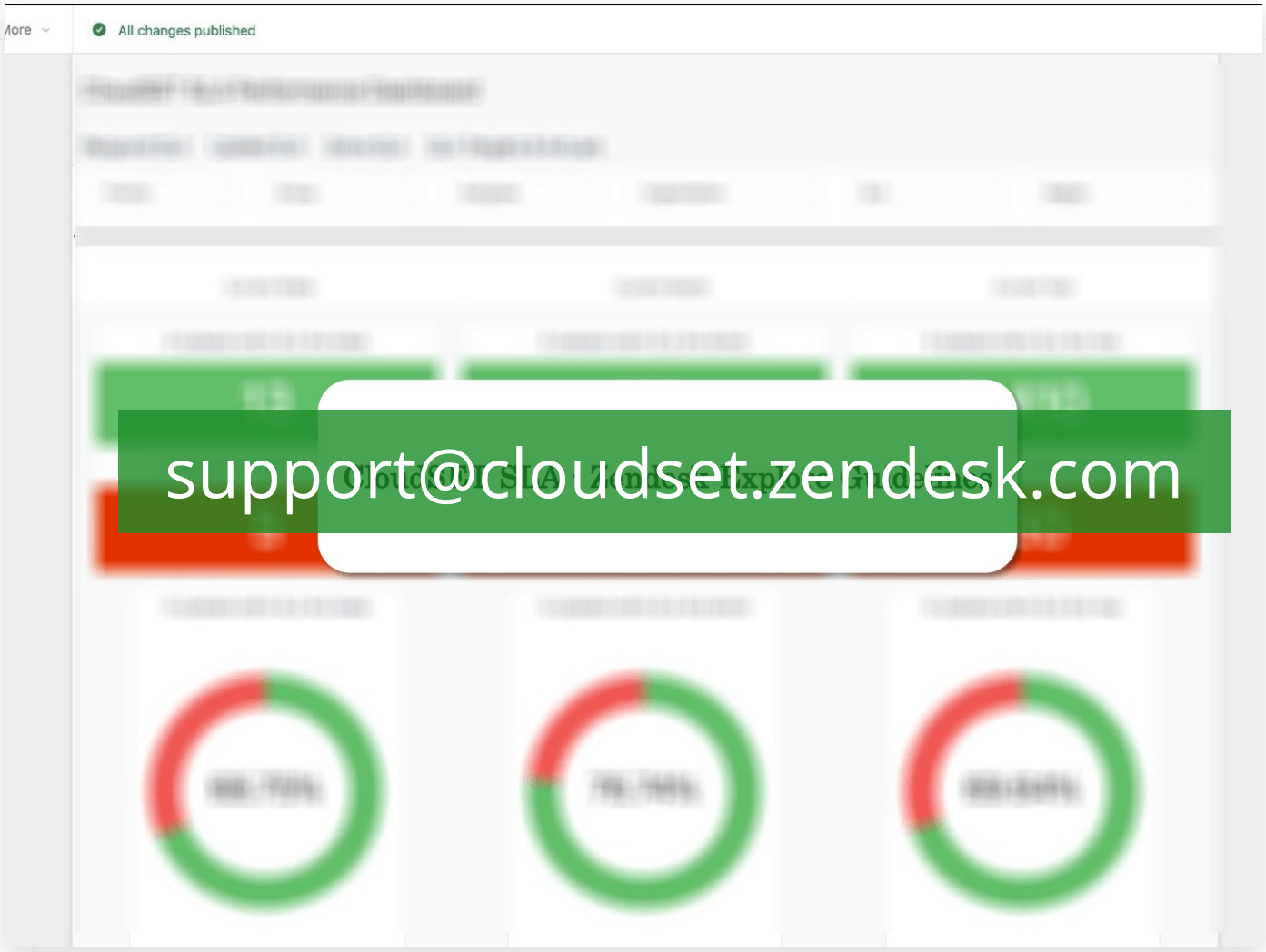
Additional filters can be introduced to the query, to limit the list of tickets in the drill through table, to only those of relevance



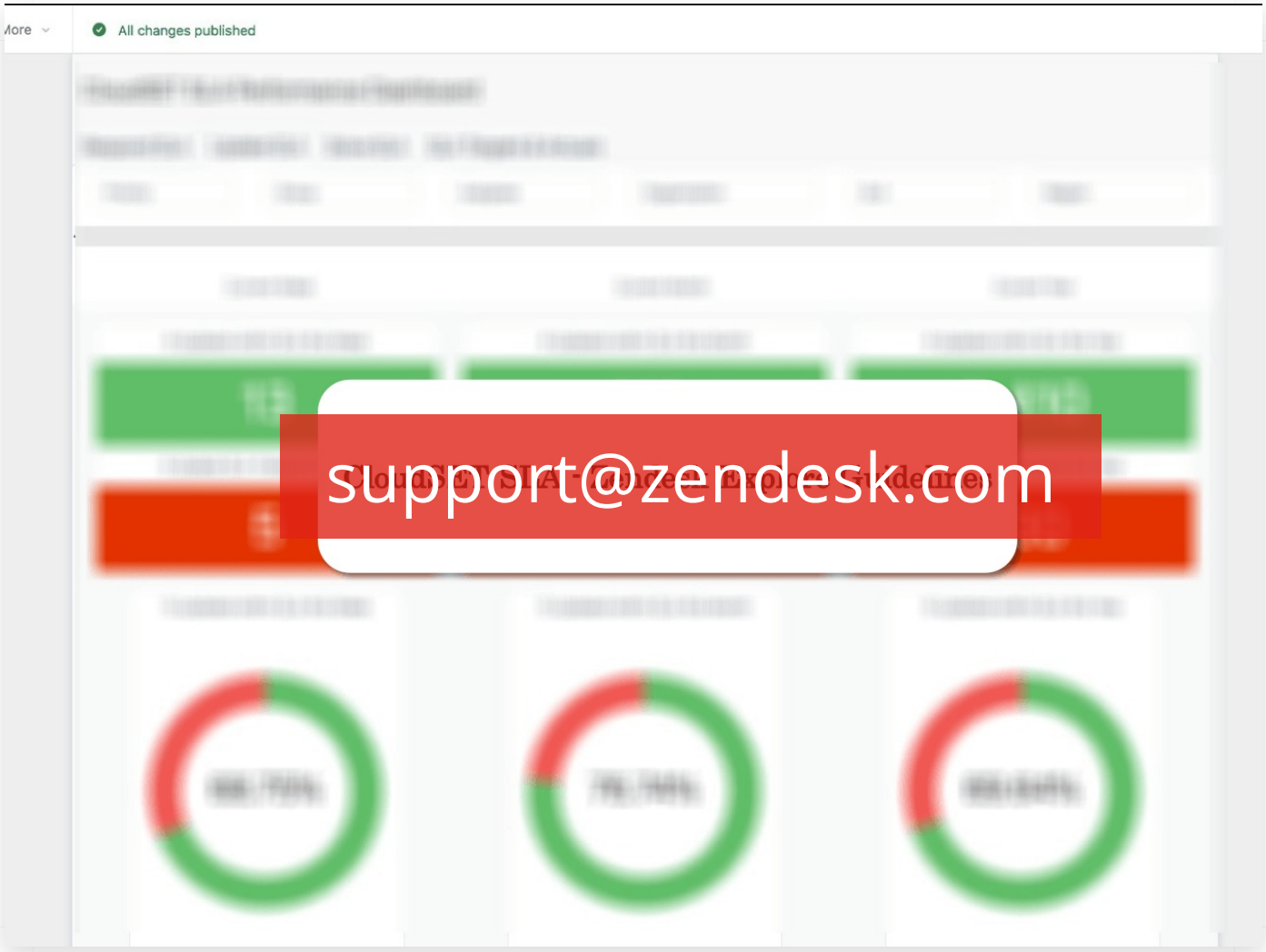
In order to avoid long running queries, or exceeding the 50k row limit, it will also be necessary to apply a filter, that restricts the type and volume of changes returned in the underlying query, to include only those that involve changes to the SLA measurement



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