

# The Zendesk Explore Cookbook

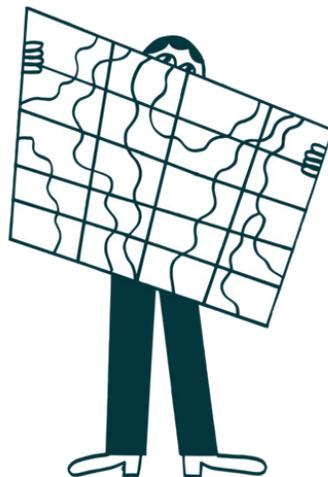


For Zendesk Support



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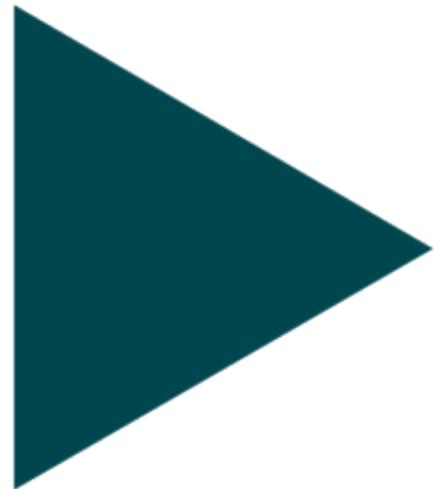
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# Introduction

Welcome to the Explore Cookbook!

In this eBook, you'll find recipes that teach you how to quickly accomplish some common business reporting scenarios using Explore with Zendesk Support. You can use these as they are or you can experiment to make them your own.



We've included some of the most popular recipes here, but there are many more.

Check out our [recipes reference](#) to see all of the available recipes.

# Reporting on created and solved tickets

This recipe shows you how to create custom reports to analyze your created and solved tickets by date, and by a specific day of the week.

Skill level: Easy

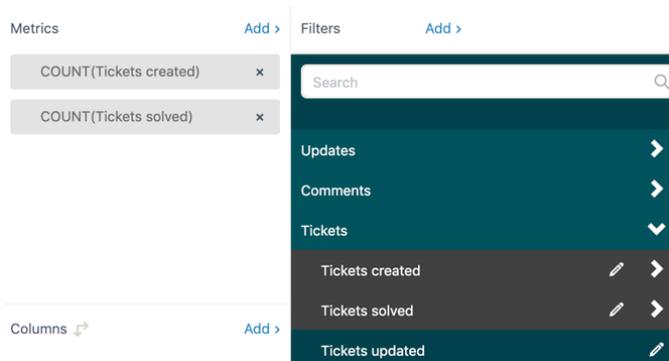
Time required: 20 minutes

- Zendesk Explore Professional
- Editor or Admin permissions (see [Giving agents access to Explore](#))
- Ticket event data in Zendesk Support

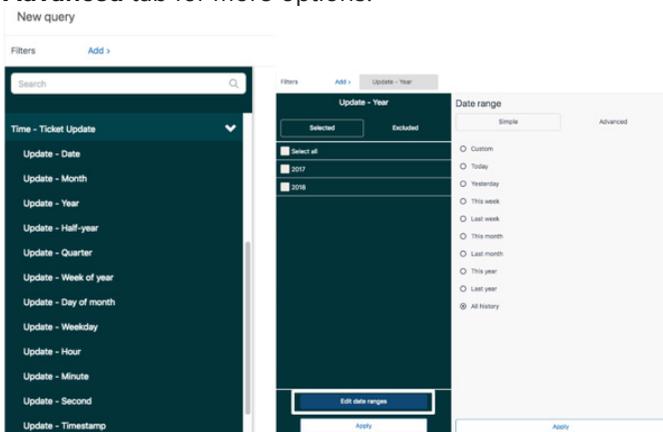


## Creating the report

1. In Explore, click the query icon .
2. In the Queries library, click **New query**.
3. On the **Choose a dataset** page, click **Support > Tickets > Support: Ticket updates**, then click **Apply**. Query builder opens.
4. Next, add your metrics, the things you want to measure. In this case, you'll add the number of tickets created and solved. In the **Metrics** panel, click **Add**.
5. From the list of metrics, choose **Tickets > Tickets created** and **Tickets > Tickets solved**, then click **Apply**.



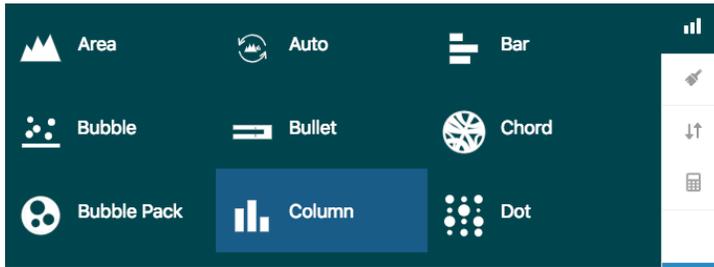
6. Next, apply a date range. In the **Filters** panel, click **Add**.
7. From the list of attributes, choose **Time - Ticket update > Update - Year**, then click **Apply**.
8. Click **Update - Year**, and then **Edit date ranges**. You can choose one of the simple time ranges offered, or click the **Advanced** tab for more options.



9. In the **Columns** panel, add the attribute **Update - Date**, which will show the daily results for the period you chose previously.

# Reporting on created and solved tickets (continued)

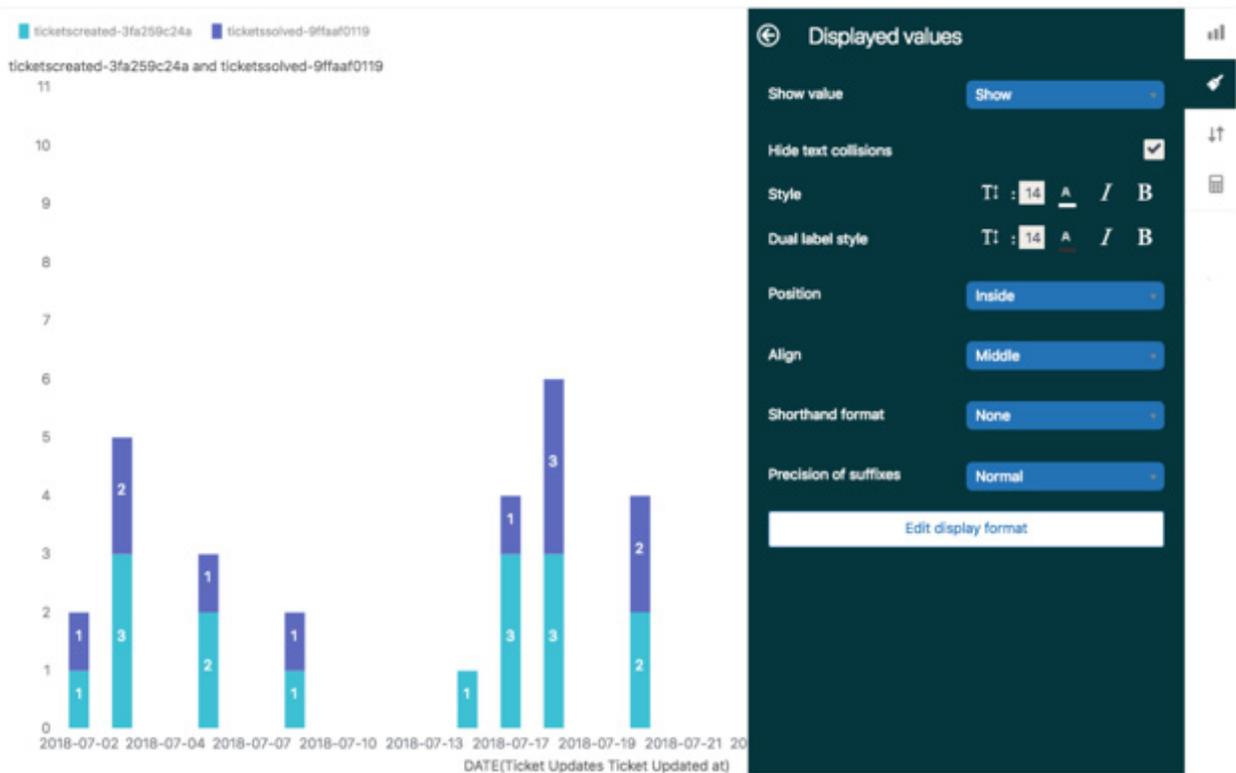
10. In the Visualizations menu on the right sidebar, select the **Column** chart type.



11. In the chart configuration menu (🔧), go to the **Chart** section, click **Stacked**, and uncheck **Aggregated values**.

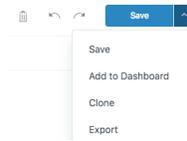


12. In the chart configuration menu, go to the **Displayed values** section - click to show the values inside the columns, and choose the color and size that you want. In the chart configuration menu you can also change the colors of the series, edit and format the **x-axis** and **y-axis** titles and labels, move the **legend**, and more.



13. Click **Save** to save the query. If you are ready, you can also add the query to a dashboard. Otherwise you can reopen the query from the library later.

## Reporting on created and solved tickets (continued)



### Reporting on Tickets Created and Solved by Day of the Week

1. Follow steps 1 to 8 above.
2. When you add **Update - Year** at step 8, click the **Advanced** tab, and from the drop-down lists, select a full number of weeks, such as 12 weeks in the past to 1 week in the past. This will give you an accurate picture of activity by weekday.
3. When you are finished, click **Apply**.



# Reporting on first reply time

This recipe shows you how to report on the average first reply time in minutes for tickets solved each day of the previous week.

Skill level: Easy

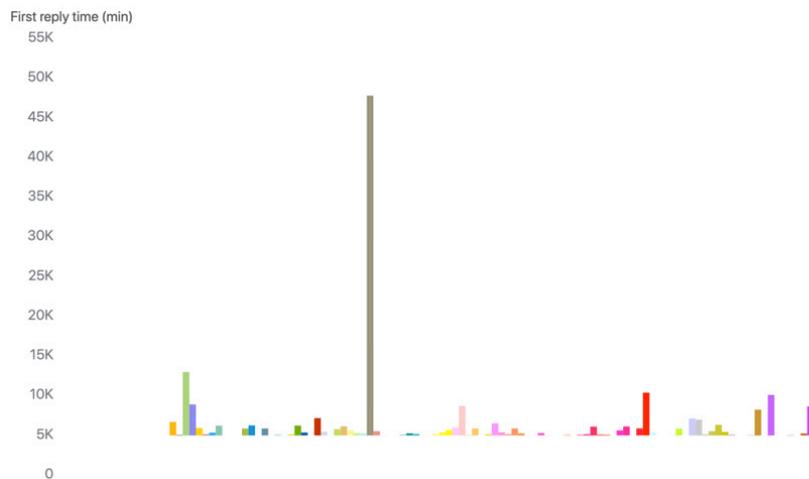
Time Required: 10 minutes

- Zendesk Explore Professional
- Editor or Admin permissions (see [Giving agents access to Explore](#))
- Ticket data in Zendesk Support



## Creating the report

1. In Explore, click the query  icon.
2. In the Queries library, click **New query**.
3. On the **Choose a dataset** page, click **Support** > **Tickets** > **Support: Tickets**, then click **New query**. Query builder opens.
4. In the **Metrics** panel, click **Add**.
5. From the list of metrics, choose **Duration between events - Calendar hours (min)** > **First reply time (min)**, then click **Apply**.
6. Click the metric you just added, select **AVG** as the aggregator of this metric, then click **Apply** (see [Changing the metric aggregator](#)).
7. In the **Rows** panel, click **Add**.
8. From the list of attributes, choose **Assignee** > **Assignee name**, then click **Apply**.
9. In the **Filters** panel, click **Add**.
10. From the list of attributes, choose **Time - Ticket solved** > **Ticket solved - Week of year**, then click **Apply**.
11. Click the filter you just added followed, then click **Edit date ranges**.
12. On the **Date range** page, choose **Last week**, then click **Apply**. This query looks at the date the ticket was created, but you can use any other date event.
13. You can now change the chart type to something that better suits your data (see [Visualization types reference](#)). A column chart works well.



# Configuring clickable links to tickets

This recipe shows you how to make ticket IDs that you include in a chart into clickable links. The report viewer can click the link, and the selected ticket will open in Support. You can quickly create clickable links when you use the following chart visualization types:

- Bullet
- Gauge
- Sparkline

With a little extra work, you can make ticket IDs in tables clickable.

In this recipe, you'll create a report that list all of your tickets with the number of agent replies. For each ticket ID displayed, you can click it to open the corresponding Support ticket.

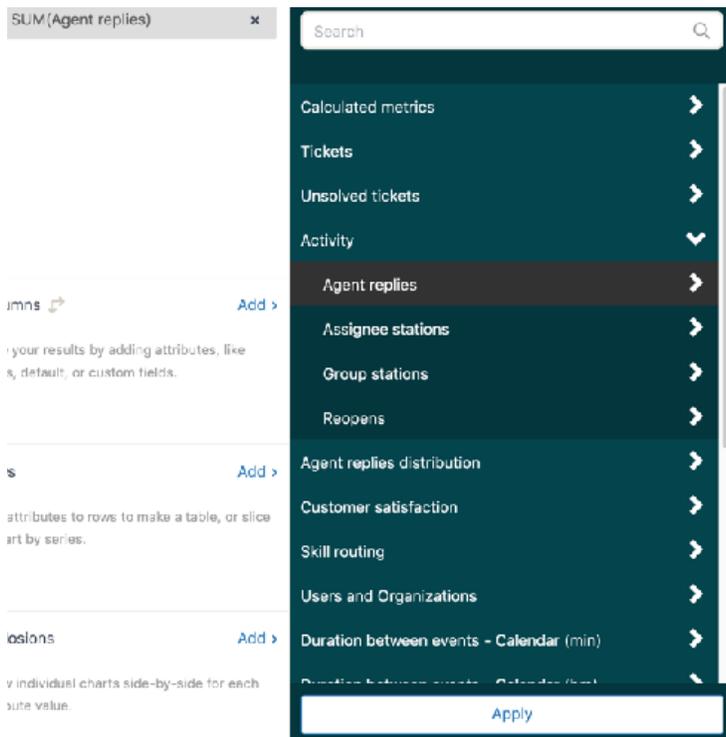
Skill level: Easy  
Time Required: 5 minutes

- Zendesk Explore Professional
- Editor or Admin permissions (see [Giving agents access to Explore](#))
- Ticket data in Zendesk Support



## Creating the report

1. In Explore, click the query  icon.
2. In the Queries library, click **New query**.
3. On the **Choose a Dataset** page, click **Support** > **Tickets** > **Support: Tickets**, then click **New query**. Query builder opens.
4. Next, add your metrics, the things you want to measure; in this case, the number of agent replies for each ticket. In the **Metrics** panel, click **Add**.
5. From the **Activity** section, choose **Agent replies**, then click **Apply**.



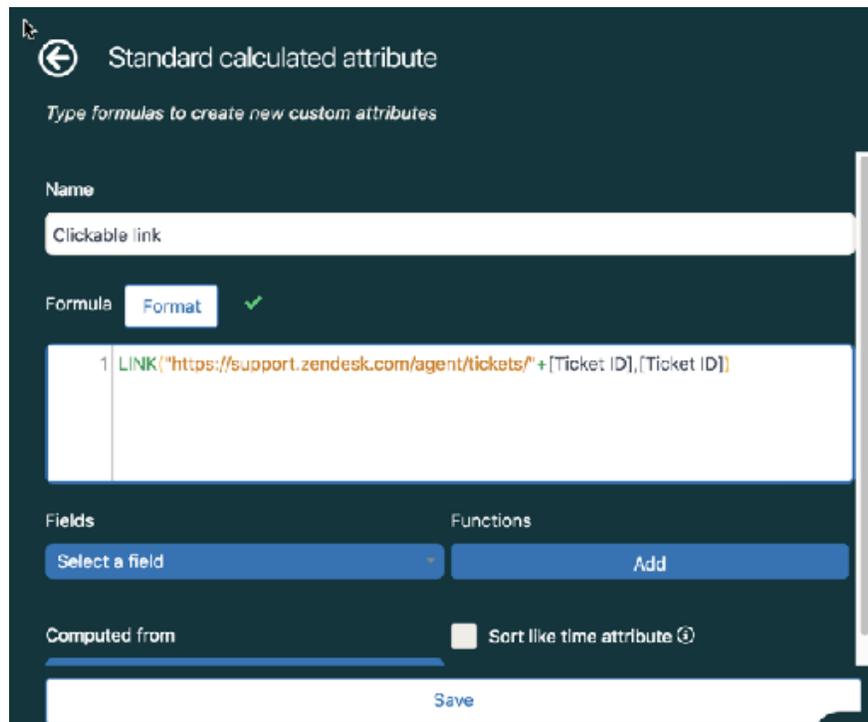
6. Explore displays the results from the metric; in this case, the number of agent replies.

## Configuring clickable links to tickets (Continued)

- Next, create a standard calculated attribute for the clickable ticket ID. In the calculations menu , click **Standard calculated attribute**.
- On the **Standard calculated attribute** page, enter a name for the attribute (for example **Clickable link**), and then enter the following formula:

```
LINK("https://support.zendesk.com/agent/tickets/"+[Ticket ID],[Ticket ID])
```

*Replace support.zendesk.com with your own subdomain.*



- When you are done, click **Save**.
- In the **Rows** panel, click Add.
- From the list of attributes, choose **Calculated Attributes** > **Clickable link**, then click **Apply**. Explore displays the chart. For each ticket, the number of agent replies is shown. If you use the Bullet, Gauge, or Sparkline visualization types, you'll see that ticket links are now clickable. To get clickable links on tables, continue with these steps.

### To make ticket links on tables clickable

- If you haven't done so already, from the visualizations menu , choose **Table**.
- From the chart configuration menu , choose **Chart**.
- From the **Text interpretation** drop-down list, choose **HTML**.
- Ensure that the **Clickable URL** box is checked.

Now, when you click any ticket number in the **Clickable link** column, it will open a new Support window with the ticket details.



# How your agents interact with customers and each other

This recipe provides a simple method for digging into your agent activity using the Updater attribute. Explore identifies the agent, admin, or end-user who updates a ticket as the updater. The report reveals how many times your agents updated their tickets with a comment.

Skill level: Easy

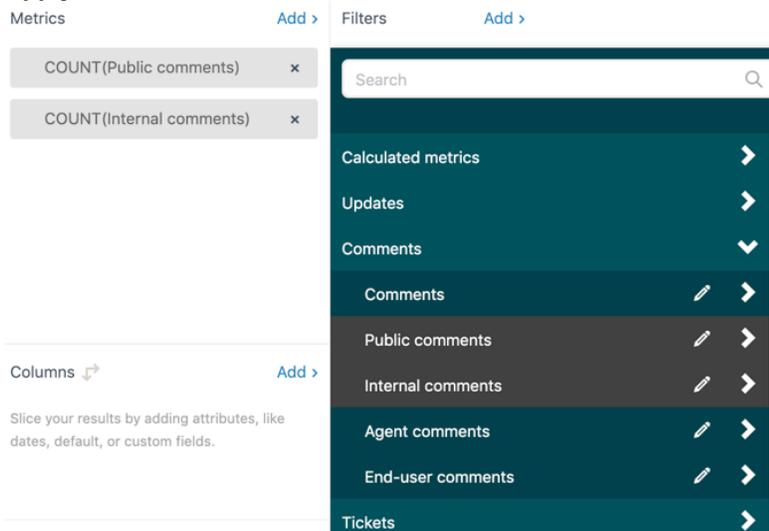
Time Required: 20 minutes

- Zendesk Explore Professional
- Editor or Admin permissions (see [Giving agents access to Explore](#))
- Ticket data in Zendesk Support



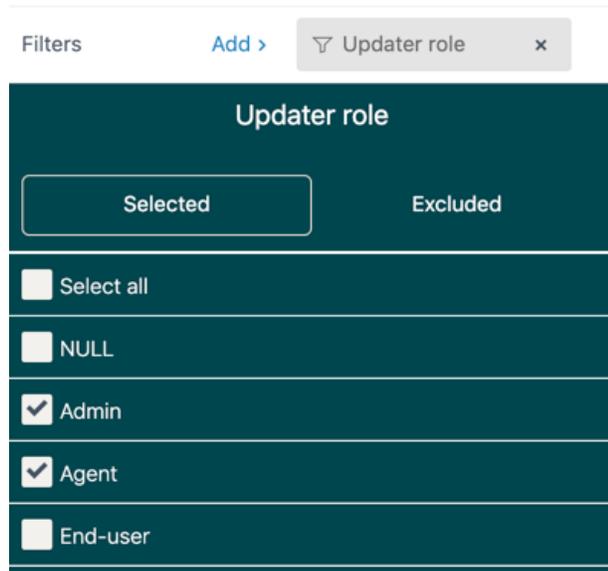
## Creating the report

1. In Explore, click the query icon .
2. In the Queries library, click **New query**.
3. On the **Choose a dataset** page, click **Support** > **Tickets** > **Support: Ticket updates**, then click **Apply**. Query Builder opens.
4. Next, add your metrics, the things you want to measure; in this case, the number of comments made. In the **Metrics** panel, click **Add**.
5. From the list of metrics, choose **Comments** > **Public comments** and **Comments** > **Internal comments**, then click **Apply**.

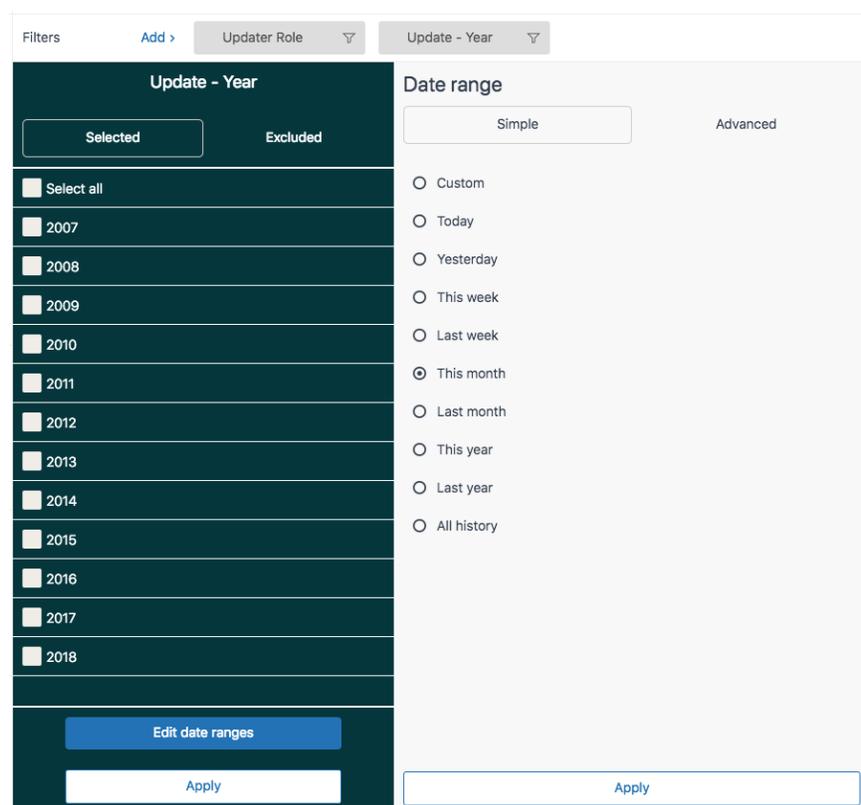


6. In the **Filters** section, click **Add**.
7. From the list of attributes, choose **Updater** > **Updater role**, then click **Apply**.
8. In the **Filters** panel, click **Updater role** to see the available results, and select the results **Agent** and **Admin** (if relevant). This will limit the results to comments by your team members only.

## How you agents interact with customers and each other (continued)



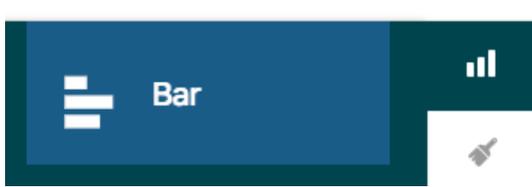
9. In the **Filters** panel, add **Update** > **Update - Year**. Once added, click it, then click **Edit date ranges**.
10. Choose the period you want to view, for example **This month**.



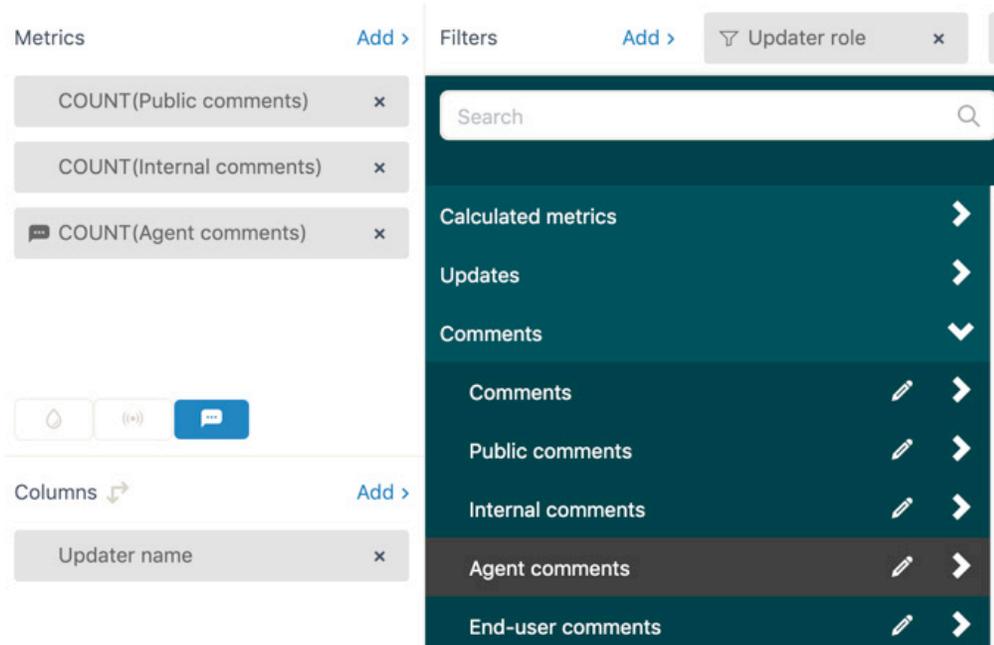
11. In the **Columns** panel, add **Updater name**, then click **Apply**.

# How you agents interact with customers and each other (continued)

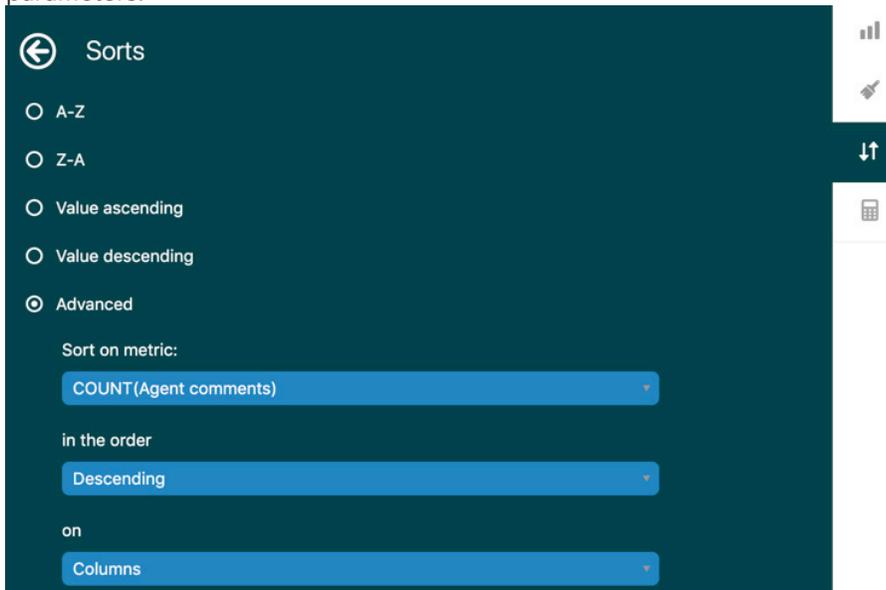
12. From the Visualizations selector, choose the **Bar** visualization.



13. To sort your chart, add another metric using the 'datapip' button in the metrics section. Choose **Comments** and then click **Apply**.

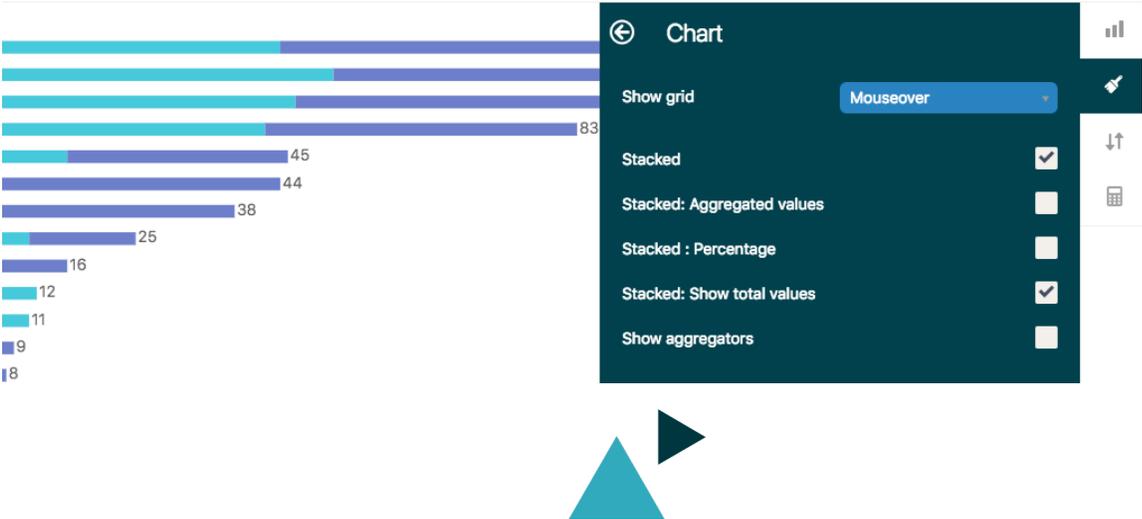


14. Then, from the result manipulation menu, go to the **Sort** section, and apply an advanced sort using the following parameters:



# How you agents interact with customers and each other (continued)

15. To stack your chart, go to the chart configuration menu, **Chart** section, and configure the following parameters:



# Reporting on full resolution time

This report shows you how to measure the amount of time between when a ticket is created to when it is solved for the last time.

Skill level: Easy

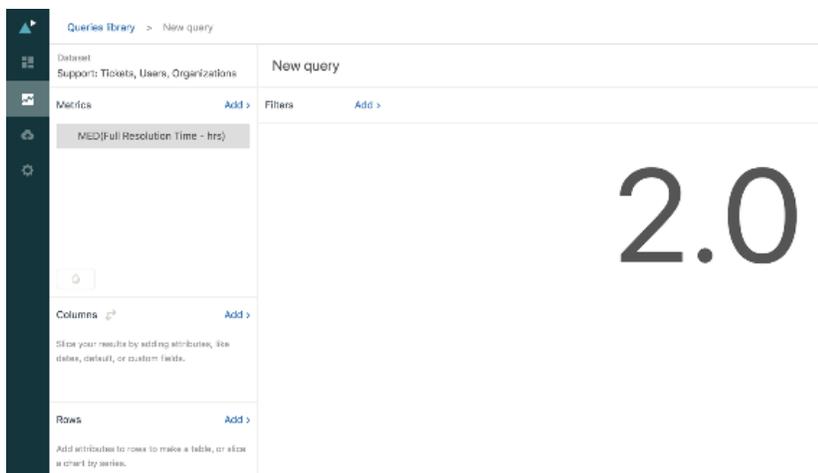
Time Required: 5 minutes

- Zendesk Explore Professional
- Editor or Admin permissions (see [Giving agents access to Explore](#))
- Ticket data in Zendesk Support

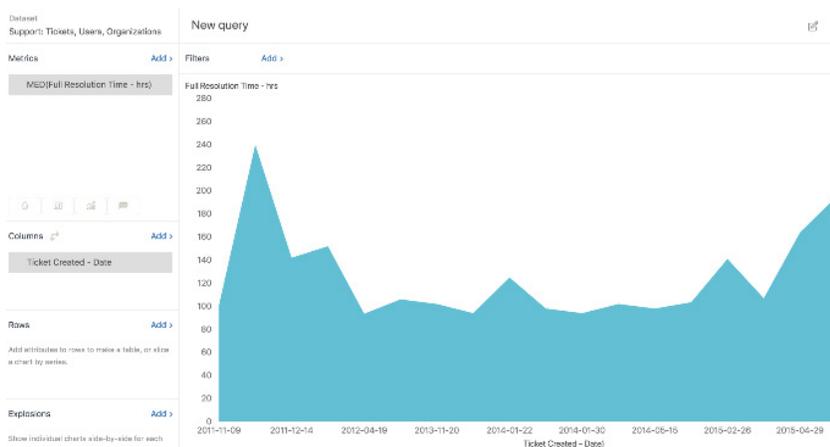


## Creating the report

1. In Explore, click the query icon .
2. In the Queries library, click **New query**.
3. On the **Choose a Dataset** page, click **Support** > **Tickets** > **Support: Tickets**, then click **New query**. Query builder opens.
4. In the **Metrics** panel, click **Add**.
5. From the list of metrics, choose **Duration between events - Calendar hours (hrs)** > **Full resolution time (hrs)**.
6. Click **Apply**. Explore calculates and displays the median time taken between when a ticket is created to when it is solved for the last time.



7. Now, you can slice this data by adding one or more attributes. For example, if you add **Ticket created - Date** to the **Columns** panel, you can see the full resolution time on a day-by-day basis.



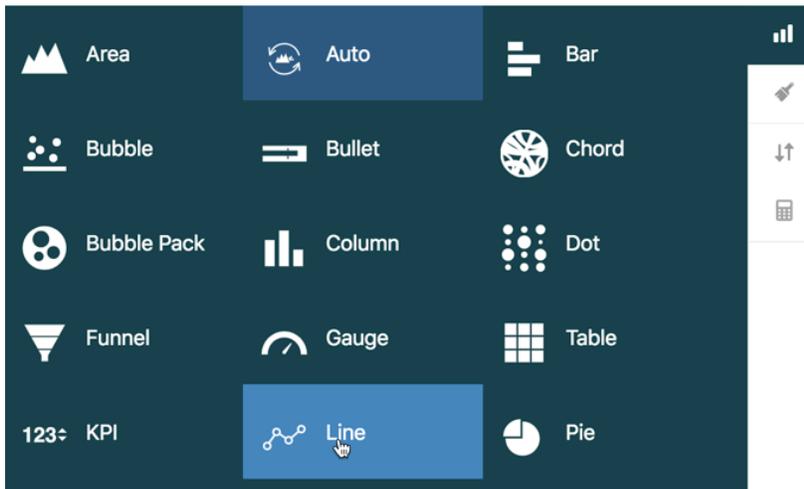
# Reporting on full resolution time (Continued)

## Customizing the report

Typically, the report you just generated will return a lot of results. To make your report more digestible, you can filter ticket results and select different chart types to represent your data. For example, you can filter ticket results to a specific month and select a line chart to show the increase or decrease in resolution time during that month.

### To add a month filter to the report

1. In the **Filters** panel, click **Add**.
2. From the list of attributes, click **Time - Ticket created** > **Ticket created - Date**.
3. Click **Apply**. The filter is displayed in the **Filters** panel.
4. Now, when you click the **Ticket created - Date** filter, you can select only the months you want to see on the report.
5. To change the report to display a line chart
6. In the visualization type menu (📊), click **Line**.



The chart is redrawn as a line diagram.



# Agent interactions on tickets

In this recipe, you'll learn how to create a query to show the number of interactions your agents are having on tickets, both with end-users and with each other. The query counts the number of private and public comments made by agents.

Skill level: Easy

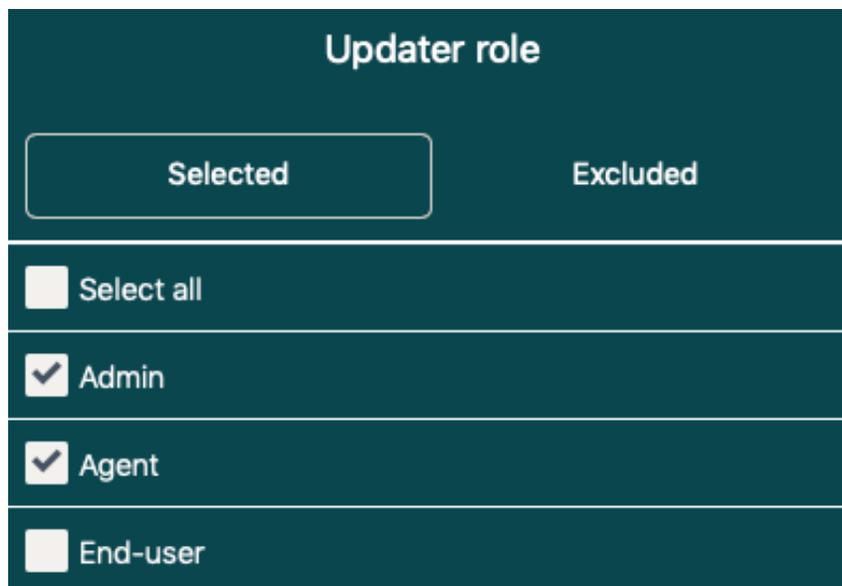
Time Required: 15 minutes

- Zendesk Explore Professional
- Editor or Admin permissions (see [Giving agents access to Explore](#))
- Ticket data in Zendesk Support



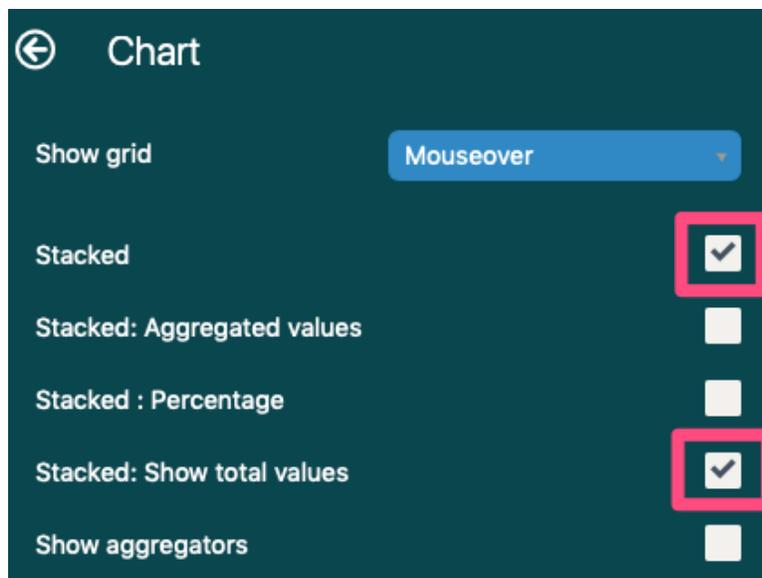
## Creating the report

1. In Zendesk Explore, click the query  icon.
2. In the Queries library, click **New query**.
3. On the **Choose a dataset** page, click **Support** > **Ticket updates** > **Support: Ticket updates**. Query builder opens.
4. In the **Metrics** panel, click **Add**.
5. From the list of metrics, choose **Comments** > **Public comments** and **Comments** > **Internal comments**, then click **Apply**.
6. In the **Columns** panel, click **Add**.
7. From the list of attributes, choose **Updater** > **Updater name**, then click **Apply**.
8. In the **Filters** panel, click **Add**.
9. From the list of attributes, choose **Updater** > **Updater role**, then click **Apply**.
10. Click the **Updater role** filter you just added and then, on the **Selected** tab, tick **Admin** and **Agent**.

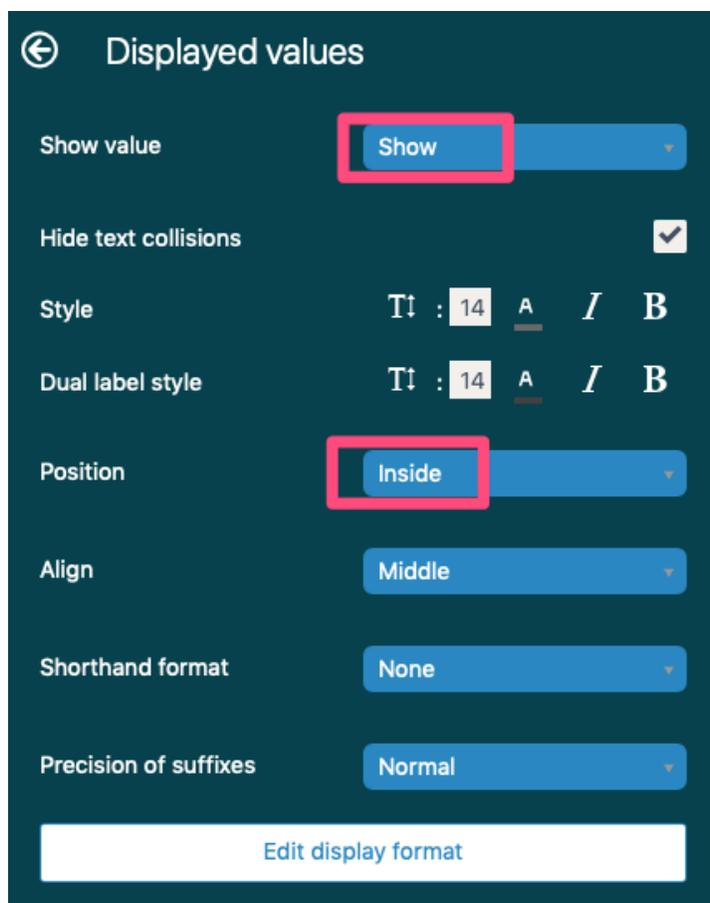


11. When you are finished, click **Apply**.
12. From the Visualization type  menu, choose **Column**.
13. In the Chart configuration  menu, click **Chart**.
14. On the **Chart** page, enable **Stacked** and **Stacked: Show total values**.

## Agent interactions on tickets (Continued)

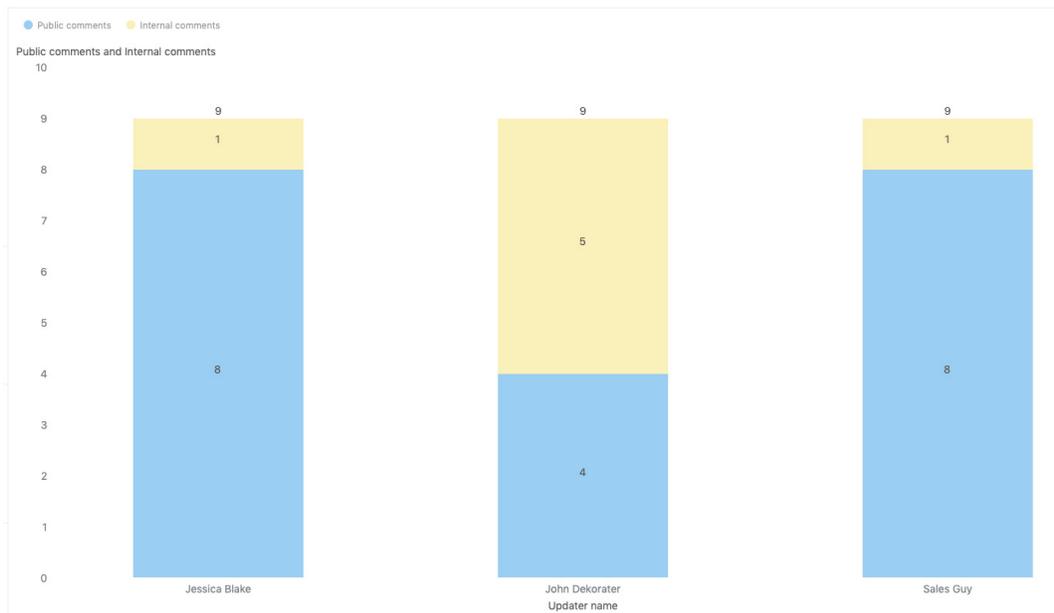


15. In the Chart configuration menu (🔧) click **Displayed values**.
16. On the **Displayed values** page, set **Show value** to **Show**, and set **Position** to **Inside**.



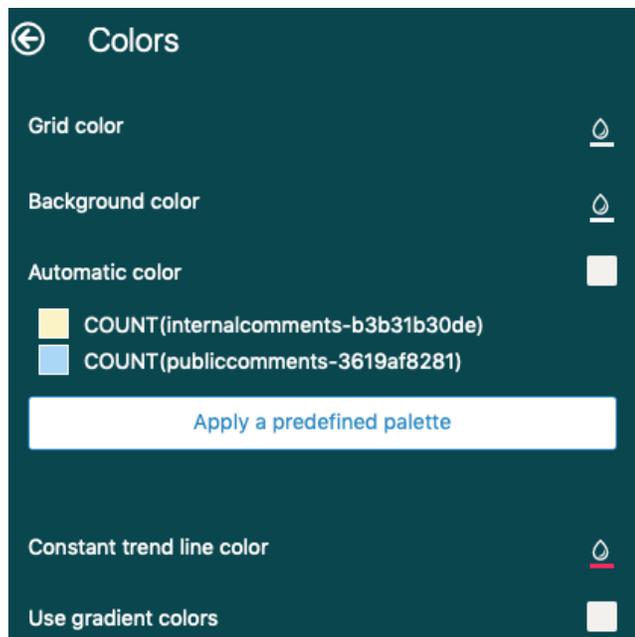
# Agent interactions on tickets (Continued)

17. The query is complete. See the screenshot below for an example.



## Next steps

You might want to edit the colors of the columns so that the displayed values are easier to read. To change them, click Chart configuration (🔧), then **Colors**.



For more information about customizing the appearance of the query, see [Customizing queries](#).



# Reviewing SLA performance

In this recipe, you'll learn how to create an Explore report to compare your performance to specific SLA targets. This query is specific to the First Reply Time target, however, the filter can be modified to suit any of the SLA metrics.

Skill level: Moderate  
Time Required: 20 Minutes

- Zendesk Explore Professional
- Editor or Admin permissions (see [Giving agents access to Explore](#))
- Ticket data in Zendesk Support

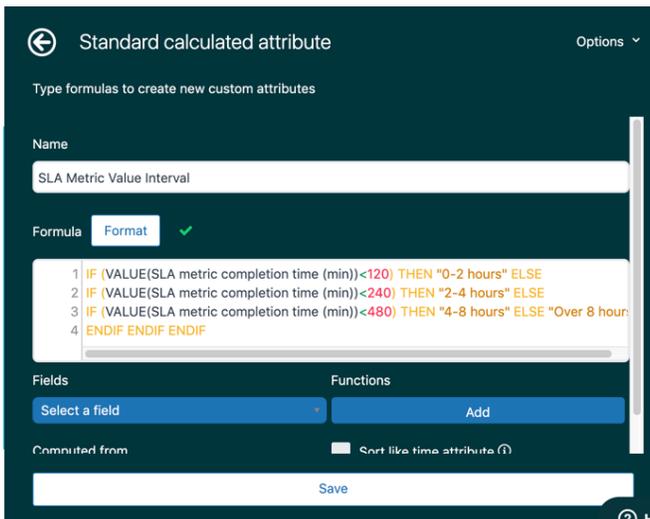


## Creating the report

1. In Zendesk Explore, click the query  icon.
2. In the Queries library, click **New query**.
3. On the **Choose a dataset** page, click **Support** > **SLAs** > **Support: SLAs**, then click **New query**. Query builder opens.
4. Now, create a Standard calculated attribute to calculate the different intervals of your targets. You can modify the values to suit the intervals you want to report on. Click Calculations , then click **Standard calculated attribute**.
5. Copy the attribute calculation below and paste it into the attribute editor.

```
Name: SLA Metric Value Interval
IF (VALUE(SLA metric completion time (min))<120) THEN "0-2 hours" ELSE
IF (VALUE(SLA metric completion time (min))<240) THEN "2-4 hours" ELSE
IF (VALUE(SLA metric completion time (min))<480) THEN "4-8 hours" ELSE "Over 8 hours"
ENDIF ENDIF ENDIF
```

See the screenshot below as an example of what the completed attribute will look like.



6. In the **Metrics** panel, click **Add**.
7. From the list of metrics, choose **SLA Tickets** > **SLA Tickets**, then click **Apply**.
8. In the **Columns** panel, click **Add**.
9. From the list of attributes, choose **Calculated attributes**, click the custom attribute you created earlier (in this example, **SLA Metric Value Interval**), then click **Apply**.
10. Now, add a filter to show the metric value for first reply time only. In the **Filters** panel, click **Add**.
11. From the list of attributes, choose **Ticket SLA** > **SLA metric**, then click **Add**.
12. Click the filter you just added and change the filter to **First Reply Time**.

## Reviewing SLA performance (Continued)

Filters Add > SLA metric x

**SLA metric**

Selected Excluded

Select all

First Reply Time

Agent Work Time

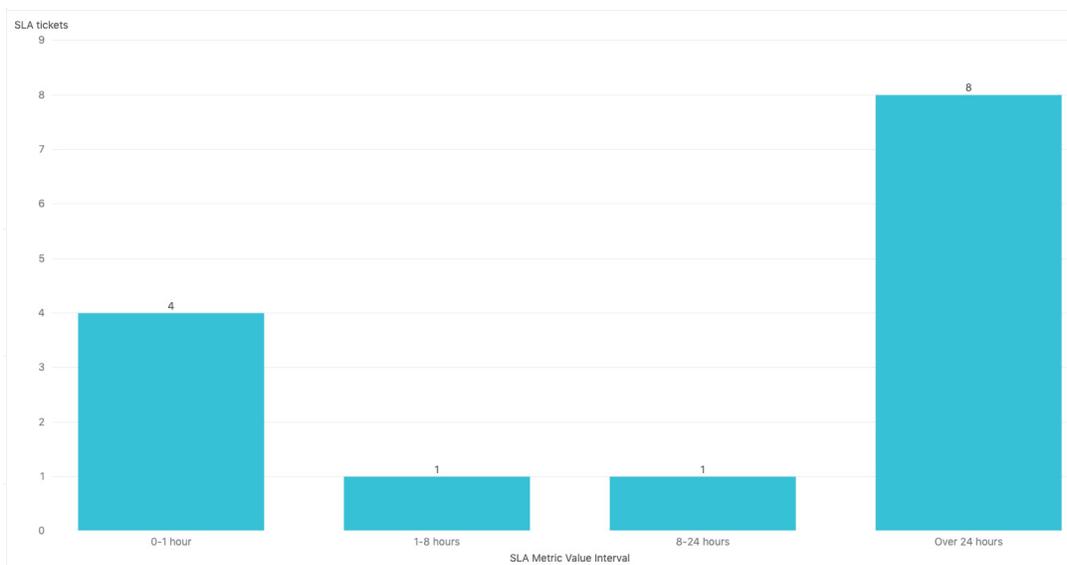
Next Reply Time

Pausable Update Time

Periodic Update Time

Requester Wait Time

13. From the visualization type menu (📊), click **Column**.
14. From the chart configuration menu (⚙️), click **Displayed values**, then change **Show value** to **Show**.
15. You've now finished this report. Here's an example of what the completed report might look like:



### Next steps

If you want to show the data in percentage format, you can click Visualization Type (📊) and choose **Pie**.



# Percentage of tickets created by channel

In this Explore recipe, you'll learn how to create an Explore query to report the percentage of tickets that were created by each channel. You can display the total values in a table format.

Skill level: Easy

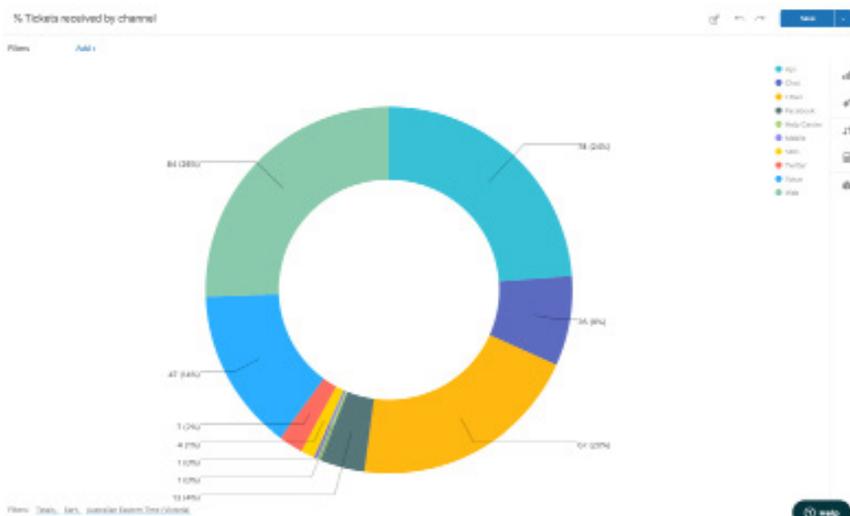
Time required: 15 minutes



- Zendesk Explore Professional
- Editor or Admin permissions (see [Giving agents access to Explore](#))

## Creating the report

1. Open a new query using the **Support: Tickets** dataset. For help, see [Creating queries](#).
2. In the **Metrics** panel, click **Add**.
3. From the list of metrics, choose **Tickets > Tickets**, then click **Apply**.
4. In the **Columns** panel, click **Add**.
5. From the list of attributes, choose **Ticket > Ticket channel**, then click **Apply**.
6. To display the percentage values of the channels tickets were received at, click Visualization type (📊) and choose **Pie**. You can also check out [Chart types for comparing values to total results](#) for more information on using charts to evaluate total results. Your report will look something like this:



## Next steps

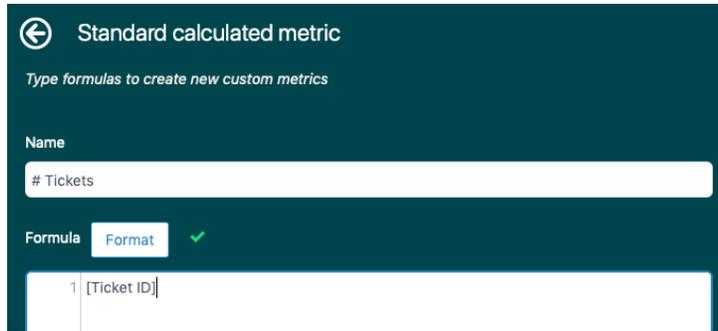
The next steps are optional and should be used if you want to display the data in a table format instead of a pie chart.

1. Click Visualization type (📊) > **Table**.
2. Drag the **Ticket channel** attribute from the **Columns** panel to the **Rows** panel.
3. Click Calculations (🧮), then click **Standard calculated metric**.
4. Now, create a standard calculated metric that is a duplicate of the **Tickets** metric. Copy the metric below and paste it into the metric editor:

[Ticket ID]

Call it something like **# Tickets** so it is easy to remember which one is the custom metric.

## Percentage of tickets created by channel (continued)



Standard calculated metric

Type formulas to create new custom metrics

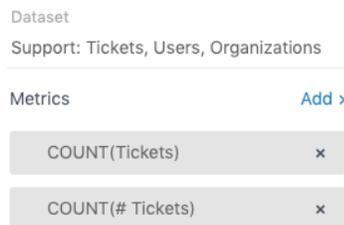
Name

# Tickets

Formula **Format** ✓

1 [Ticket ID]

5. When you are finished, click **Save**.
6. In the **Metrics** panel, click **Add**.
7. From the list of metrics, choose **Calculated metrics** > **# Tickets**, then click **Apply**.
8. Ensure the metric aggregator is set to **COUNT**.



Dataset

Support: Tickets, Users, Organizations

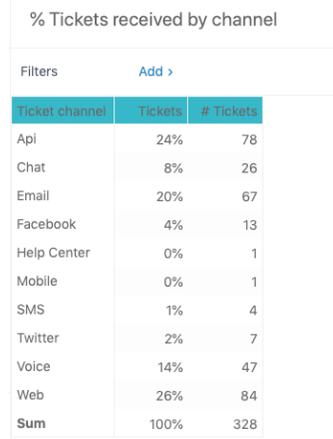
Metrics **Add >**

COUNT(Tickets) x

COUNT(# Tickets) x

9. Click Result manipulation (↓↑) > Result path calculation and change **COUNT(Tickets)** to the below:
  - **Pattern: % of total**
  - **Path: On specified attribute**
  - **Attribute: Ticket channel**
10. Click Result manipulation (↓↑) > **Totals**.
11. Under **Grand totals on** check **Rows**.
12. Under **Subtotals on** check **Rows**.
13. When you are finished, click **Apply**.

See the screenshot below for an example of the finished result:



% Tickets received by channel

Filters **Add >**

Ticket channel	Tickets	# Tickets
Api	24%	78
Chat	8%	26
Email	20%	67
Facebook	4%	13
Help Center	0%	1
Mobile	0%	1
SMS	1%	4
Twitter	2%	7
Voice	14%	47
Web	26%	84
<b>Sum</b>	100%	328



# One-touch tickets

One-touch tickets is a great report to gain context into your support efforts.

Skill level: Easy

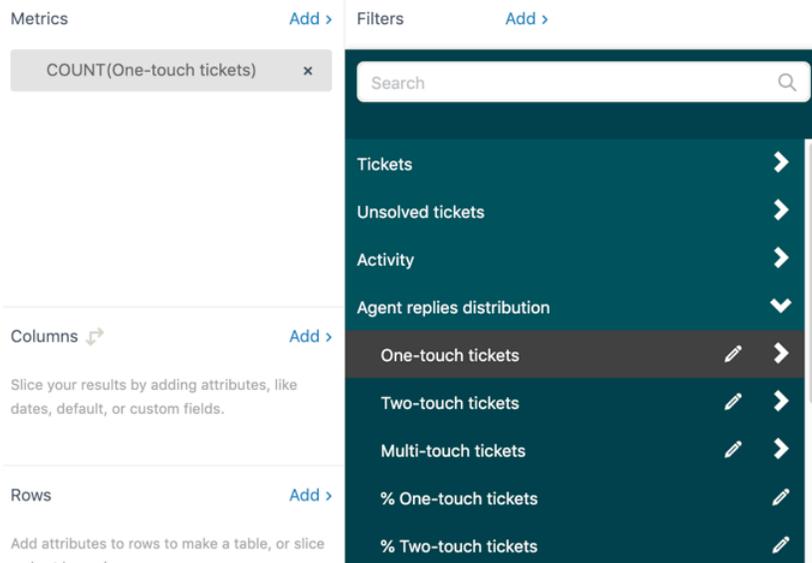
Time Required: 10 minutes

- Zendesk Explore Professional
- Editor or Admin permissions (see [Giving agents access to Explore](#))
- Ticket data in Zendesk Support



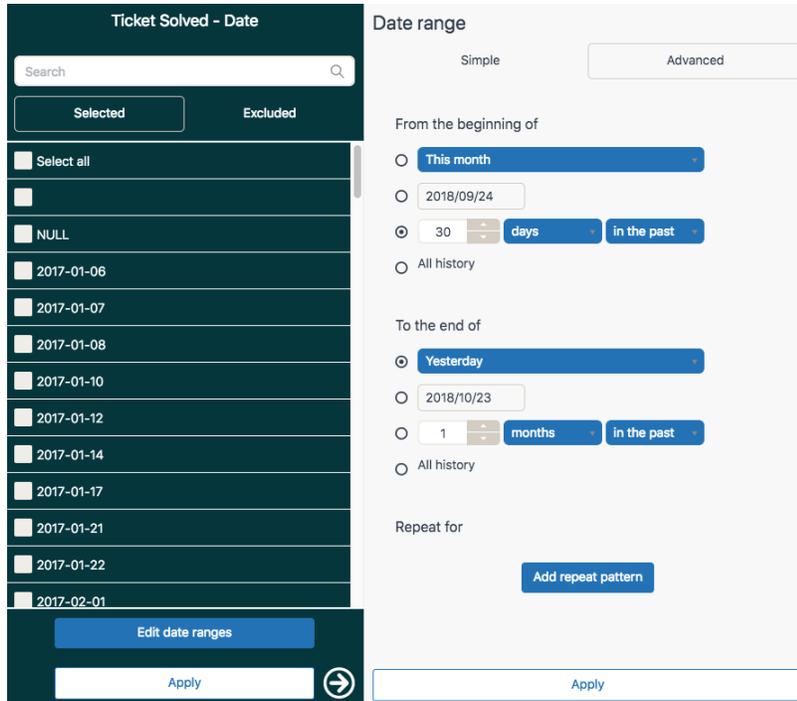
## Creating the report

1. In Explore, click the query  icon.
2. In the Queries library, click **New query**.
3. On the **Choose a Dataset** page, click **Support** > **Tickets** > **Support: Tickets**, then click **New query**. Query Builder opens.
4. Next, add your metrics, the things you want to measure. In this case, you'll add the number of tickets created. In the **Metrics** panel, click **Add**.
5. From the **Agent replies distribution** section, choose **One-touch tickets**, then click **Apply**.

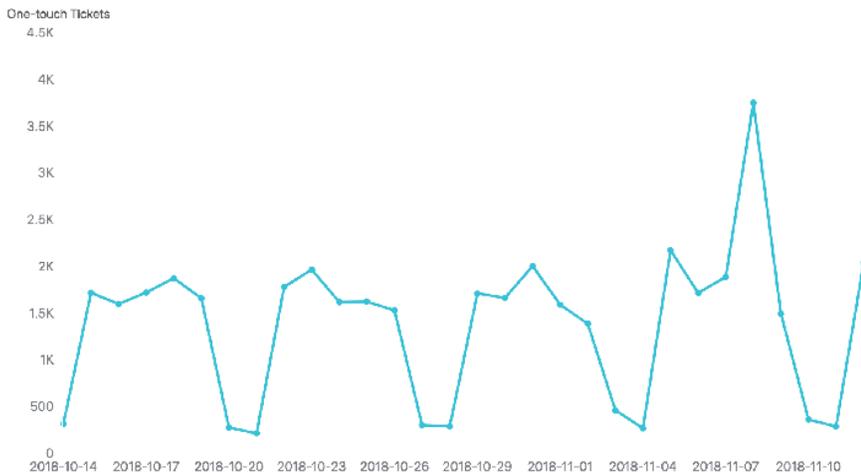


6. In the **Filters** panel, click **Add**.
7. From the **Time - Ticket solved** section of the list, choose **Ticket solved - Year**.
8. From the list, select **Edit date ranges**. In the **Advanced** tab, choose an appropriate range to view, such as the last 30 days, or last 14 days.

# One-touch tickets (Continued)



9. In the **Columns** panel, click **Add**.
10. From the **Time - Ticket solved** section, choose **Ticket solved - Date**.
11. Using the visualization selector, choose a **Line** chart.
12. You can now configure your chart how you want using the chart configuration menu (🔧). For details, see [Customizing queries](#).



# Ticket creation heatmap

A heatmap is a great way to see activity at different times in a compact and easy to read way.

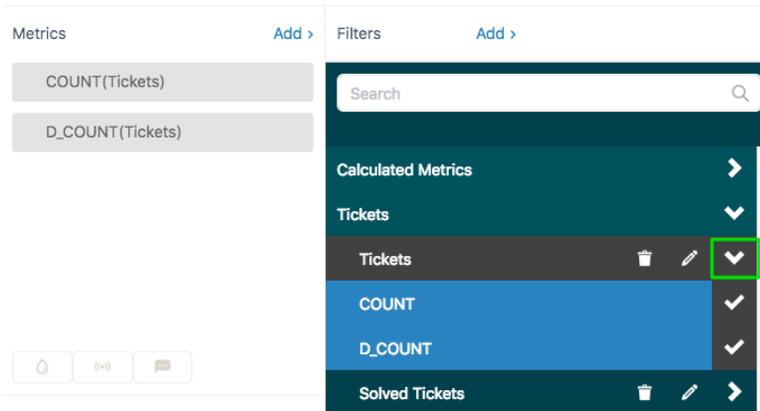
Skill level: Easy  
Time Required: 15 minutes



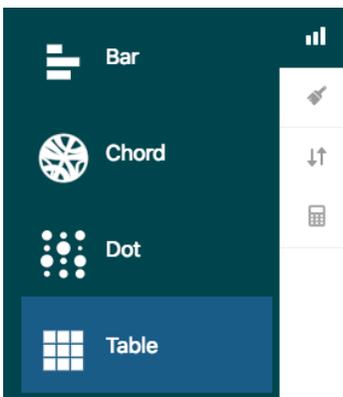
- Zendesk Explore Professional
- Editor or Admin permissions (see [Giving agents access to Explore](#))
- Ticket data in Zendesk Support

## Creating the report

1. In Zendesk Explore, click the queries icon.
2. In the Queries library, click **New query**.
3. On the **Choose a dataset** page, click **Support > Tickets > Support: Tickets**. Query Builder opens.
4. In the **Metrics** panel, click **Add**.
5. From the list of metrics, choose **Tickets > Tickets**. Make sure to select both aggregators, **COUNT** and **D\_COUNT**, then click **Apply**.

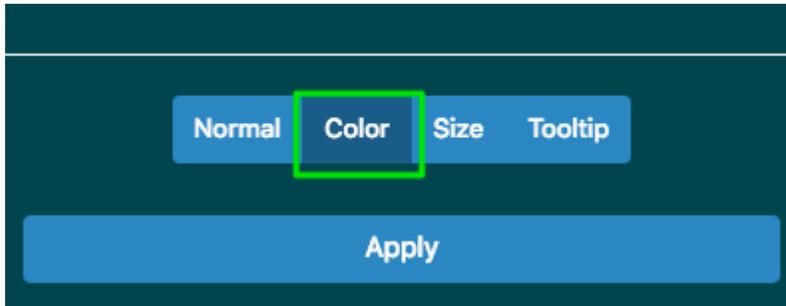


6. In the **Columns** panel, click **Add**.
7. From the list of attributes, choose **Time - Ticket created > Ticket created - Day of week**, then click **Apply**.
8. In the **Rows** panel, click **Add**.
9. From the list of attributes, choose **Time - Ticket created > Ticket created - Hour**, then click **Apply**.
10. Using the visualization selector ), change the chart type to **Table**.

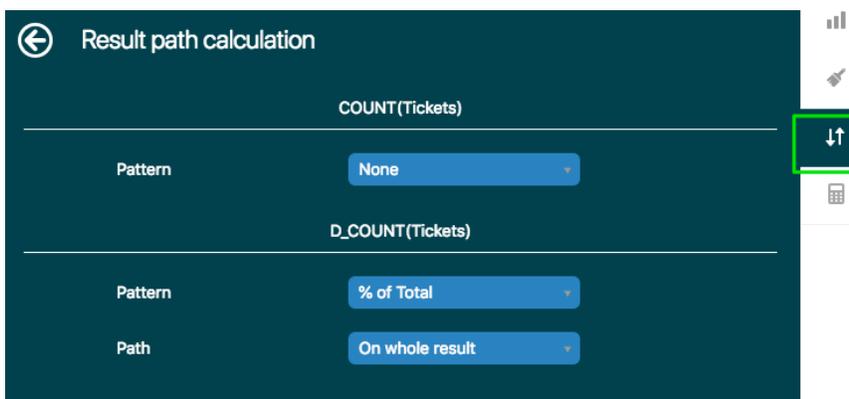


11. Click the **Ticket created - Hour** attribute and **Edit date ranges** if you want to filter the chart to show results for a specific period, for example the year to date.
12. Click the **D\_Count(Tickets)** metric. Change the treatment from **Normal** to **Color**, then click **Apply**.

## Ticket creation heatmap (Continued)



13. In the Result manipulation menu (↕), click **Result path calculation**.
14. On the **Result path calculation** page under **D\_COUNT(Tickets)**, choose the pattern **% of Total**, and the path **On whole result**.



15. In the Chart configuration menu (🎨), click **Colors**.
16. On the **Colors** page, choose **Color encoding** > **Style 1**.
17. Click the left paintdrop and select 'white'.
18. Click the right paintdrop and select the color you want to represent heavy traffic. You can move the blue dot on the color range to show more contrast between the bulk of your results.



## Further reading

We hope you've enjoyed working through these recipes. We're always creating more and will be sure to update this cookbook from time to time with the best new ones.

To finish, we've collected together some useful Explore resources to help you including a link to all of the recipes. We have over 60 at the moment and are always producing more,

### [Explore recipes reference](#)

A regularly updated list of all the available Explore recipes

### [Getting started with Explore](#)

A collection of great resources to help you learn your way around Explore

