



# Talkdesk Reporting

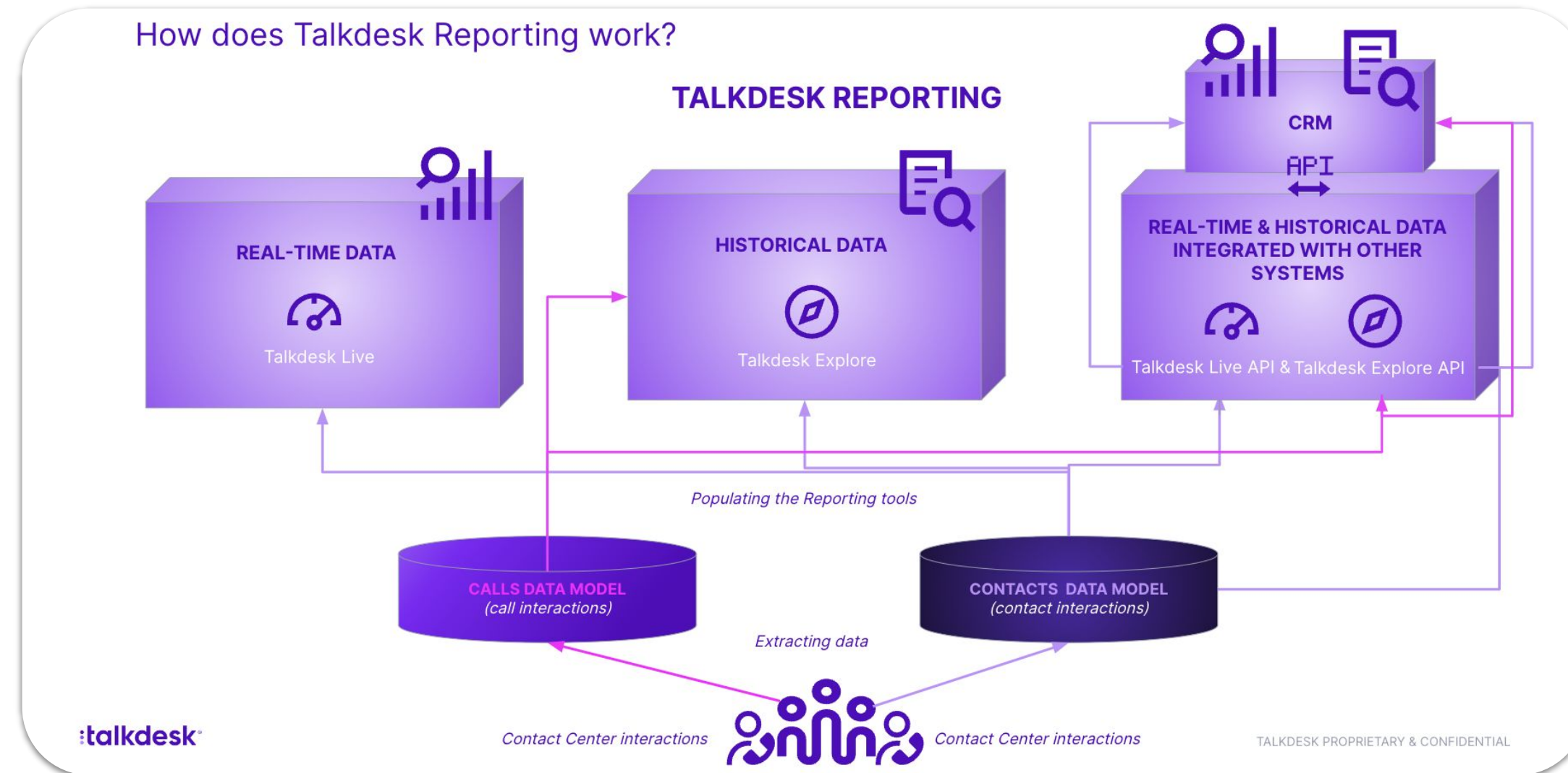
- What is Talkdesk Reporting?
- Knowledge resources
- Reporting - Live & Explore | Hands-on & Step-by-step guide

# What is Talkdesk Reporting?

With Talkdesk Reporting, you can easily access historical and real-time data from your contact center using Talkdesk Explore and Talkdesk Live. You can also integrate these data with other systems using Talkdesk Explore API and Talkdesk Live API. The extracted data of your voice and digital interactions is based on the Calls and/or the Contacts Data Model. These reporting tools allow you to tackle possible issues, anticipating your contact center's needs, and to optimize your workforce efficiency.

Get to know the tools that are part of Talkdesk Reporting in the following pages:

- **Data Models: Contacts and Calls Data Models**
- **Talkdesk Live**
- **Talkdesk Explore**

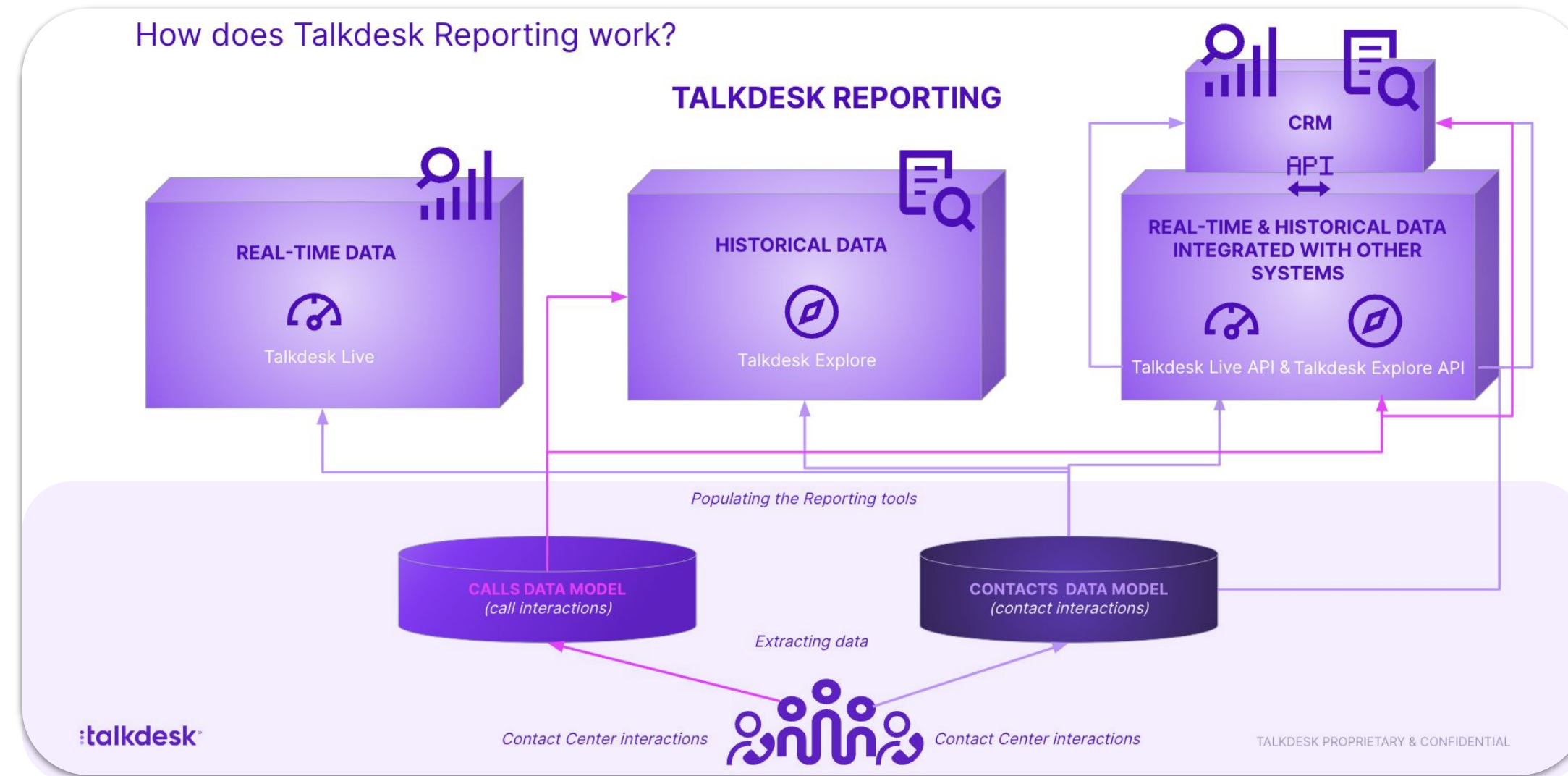


# What is Talkdesk Reporting?

## Data Models: Calls & Contacts

Talkdesk uses two Data Models - **Contacts and Calls** - that, being data paradigms are used to extract information regarding: your contact center, agent performance. And get you the best reporting solutions. These data models will populate Talkdesk Live and Talkdesk Explore

- **Calls Data Model - The Calls Data Model analyzes call interactions** from pre-queue to post-interaction to populate and it **only populates Talkdesk Explore**.
- **Contacts Data Model - The Contacts Data Model focuses on analyzing contacts data to populate Talkdesk Live and Talkdesk Explore** to make data-driven decisions for improving contact center operations. Contacts Data Model is configured via Studio.



# What is Talkdesk Reporting?

## Data Models: Calls & Contacts

Area	Call Data Model	Contacts Data Model
Focus/Analysis	The Calls Data Model analyzes <b>call interactions</b> from pre-queue to post-interaction to populate Talkdesk Explore.	The Contacts Data Model focuses on analyzing <b>contacts data</b> to populate Talkdesk Live and Talkdesk Explore to make data-driven decisions for improving contact center operations.
Applications	Talkdesk <b>Explore</b> .	Talkdesk <b>Live</b> and Talkdesk <b>Explore</b>
Data considered	Date filtering occurs at the <b>end of the interaction</b> .	<b>A contact is created once a customer reaches the queue phase, lasting until the interaction with a specific agent ends. If the customer needs to be transferred at some point in the interaction, new contact data is considered.</b>
Waiting Time	Waiting time is the <b>sum of all wait times during the interaction</b> , and the reported queue is the last one handling the interaction.	The <b>waiting time is the time of a single contact as well as the reported queue</b> . Because of this, you can expect it to increase arrival counts and decrease handle time. Within a contact, several events of the customer interaction with an agent are considered. The duration of those events within the contact are used to report the dimensions and metrics for contact center KPIs.
Examples of Metrics Analyzed	<ul style="list-style-type: none"> <li>• <b>% Inbound Calls</b> -Includes abandoned, short abandoned, missed, and voicemails.</li> <li>• <b>AVG % Talk Time Inbound</b> - The timer begins when the customer is connected with an agent, and ends when the call is disconnected. It does not include the time spent ringing the agent nor time spent in After Call Work, but it includes hold time during the call.</li> <li>• <b>% Inbound Calls Voicemail</b> - This is the percentage of Inbound Calls Voicemail Over Total Inbound Calls</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Inbound Contacts</b> - Including all contacts that reach a queue, regardless of the contact's final status.</li> <li>• <b>Abandoned Contacts</b> - These are inbound contacts where the caller disconnected after entering a queue but prior to getting connected to an agent. Calls that disconnect while ringing an agent also fall under this definition.</li> <li>• <b>Pre-queue Abandons</b> - Contacts where the person initiating the inbound contact disconnects before entering a queue. Calls that end during an IVR prompt count as pre-queue abandons.</li> </ul>
Service Level Calculation	Service Level calculated based on <b>inbound and missed calls within the Service Level Threshold</b> .	For Service Level calculation, <b>only contacts answered within the Service Level Threshold are counted positively. Abandoned contacts have a negative impact</b> on the Service Level percentage.

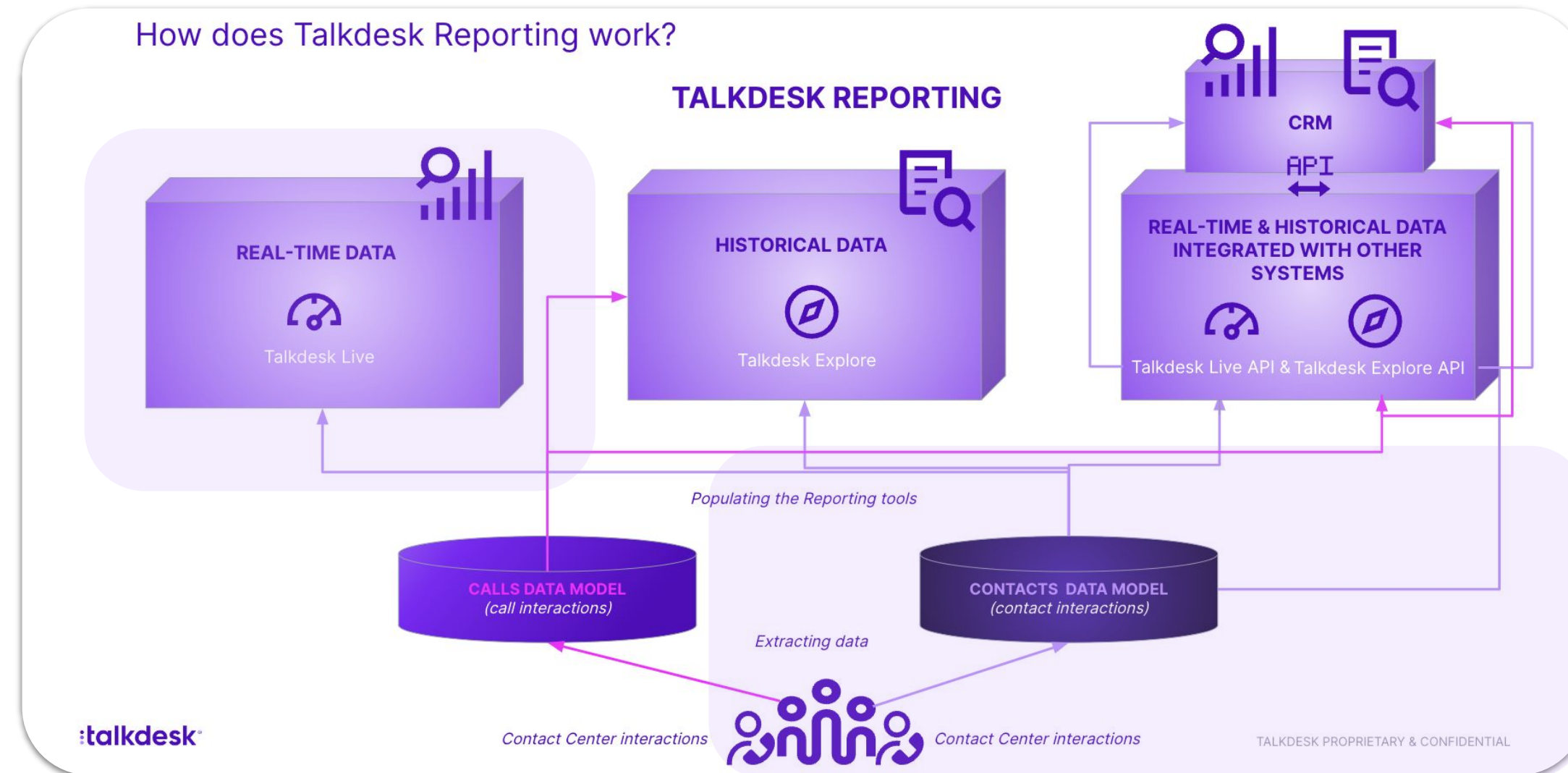
# What is Talkdesk Reporting?

Talkdesk Live

**Talkdesk Live** is a reporting tool that enables **real-time monitoring of your contact center queue performance and agent contact handling, using configurable and filterable widgets**, including as well sharing capabilities. It allows you to retrieve specific results and gain extra granularity by adjusting the widgets preferences and filters.

**Live's Key Performance Indicator (KPI) widgets and live contact monitoring capabilities** allow you to easily manage queue and agent performance in real time, all in one view. **You can find Today metrics and Live metrics.** Keep in mind that, Today metrics consider results from midnight until the moment of analysis, being refreshed with the latest available data.

To extract the details of each real-time interaction, **Live uses only the Contacts data model.**



# What is Talkdesk Reporting?

Talkdesk Live

## Today

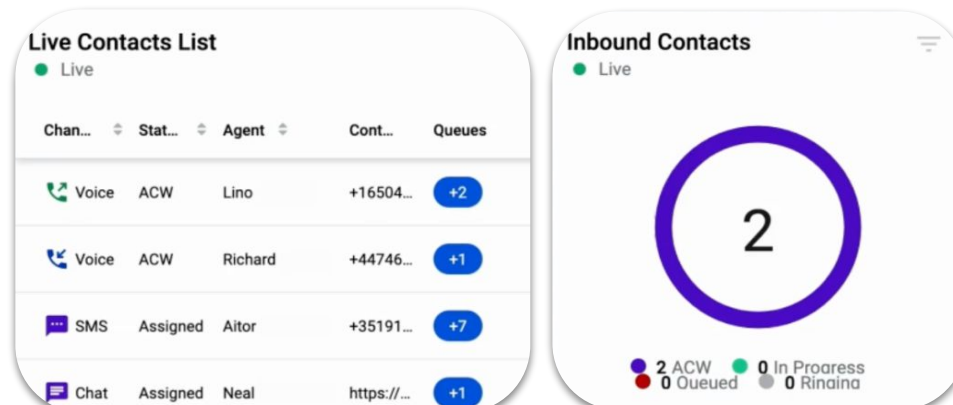
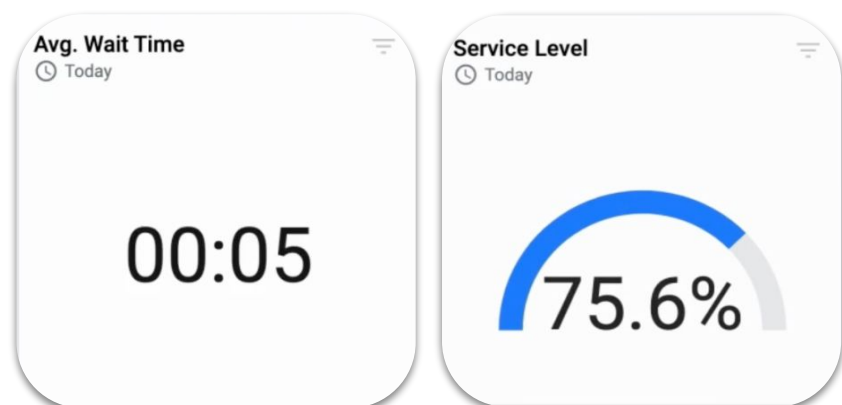
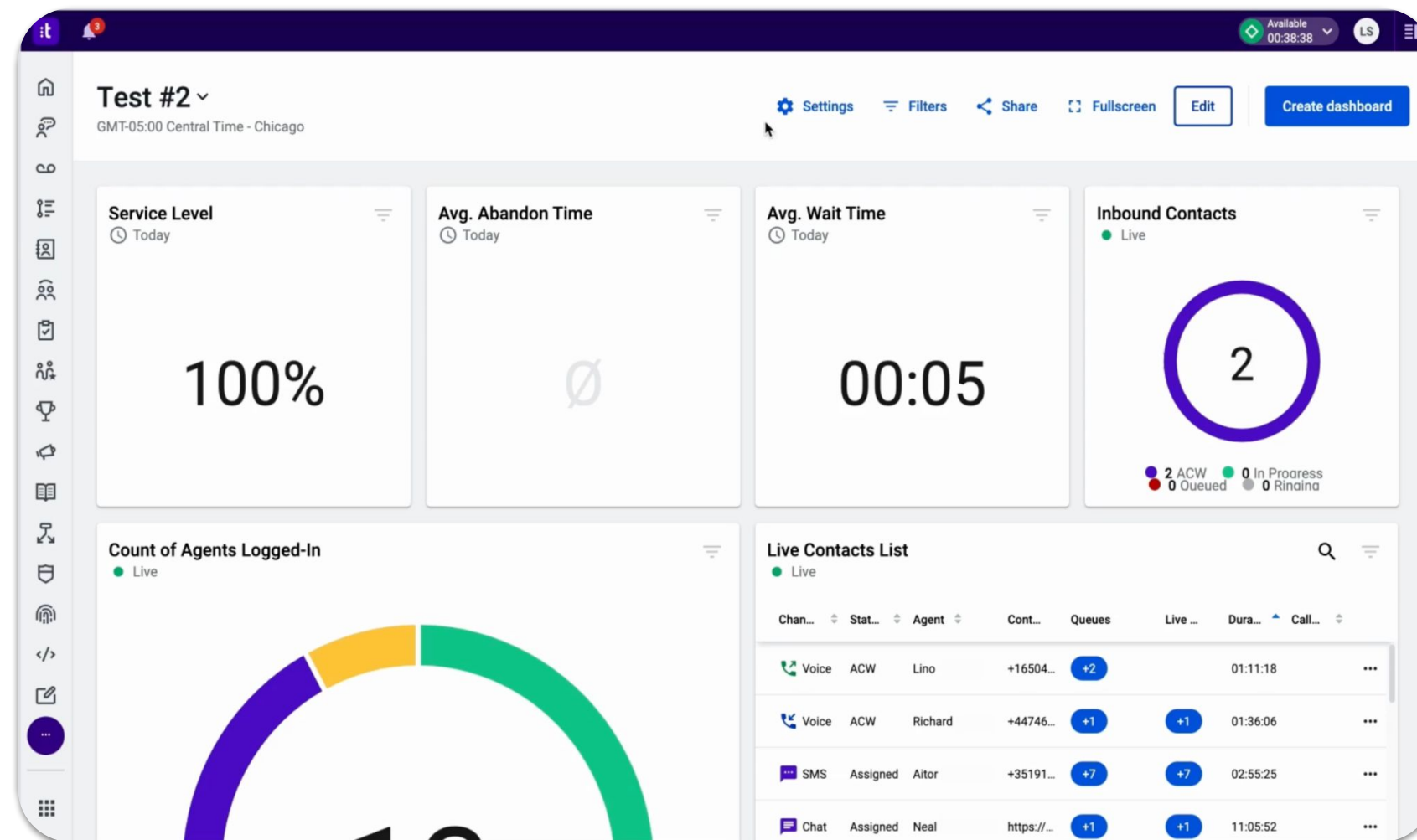
### Today Metrics:

- Abandon Contacts
- Abandon Rate
- Answered Contacts
- Arrived Contacts
- Avg. Abandon Time
- Avg. Handled Time
- Avg. Wait Time
- Missed Contacts
- Service Level
- Outbound Contacts
- Connected Contacts (Outbound)
- Not Connected Outbound Contacts

## Live


### Live Metrics:

- Inbound Contacts
- Count of Agents Logged In
- Live Contacts in Progress (Inbound)
- Live Contacts in Progress (Outbound)
- Live Contacts in Queue
- Live Contacts (Inbound)
- Live Contacts (Outbound)
- Live Contacts List
- Live Agents List
- Live Unassigned Contacts List
- Offline Agents List
- Longest Wait Time
- Longest Hold Time



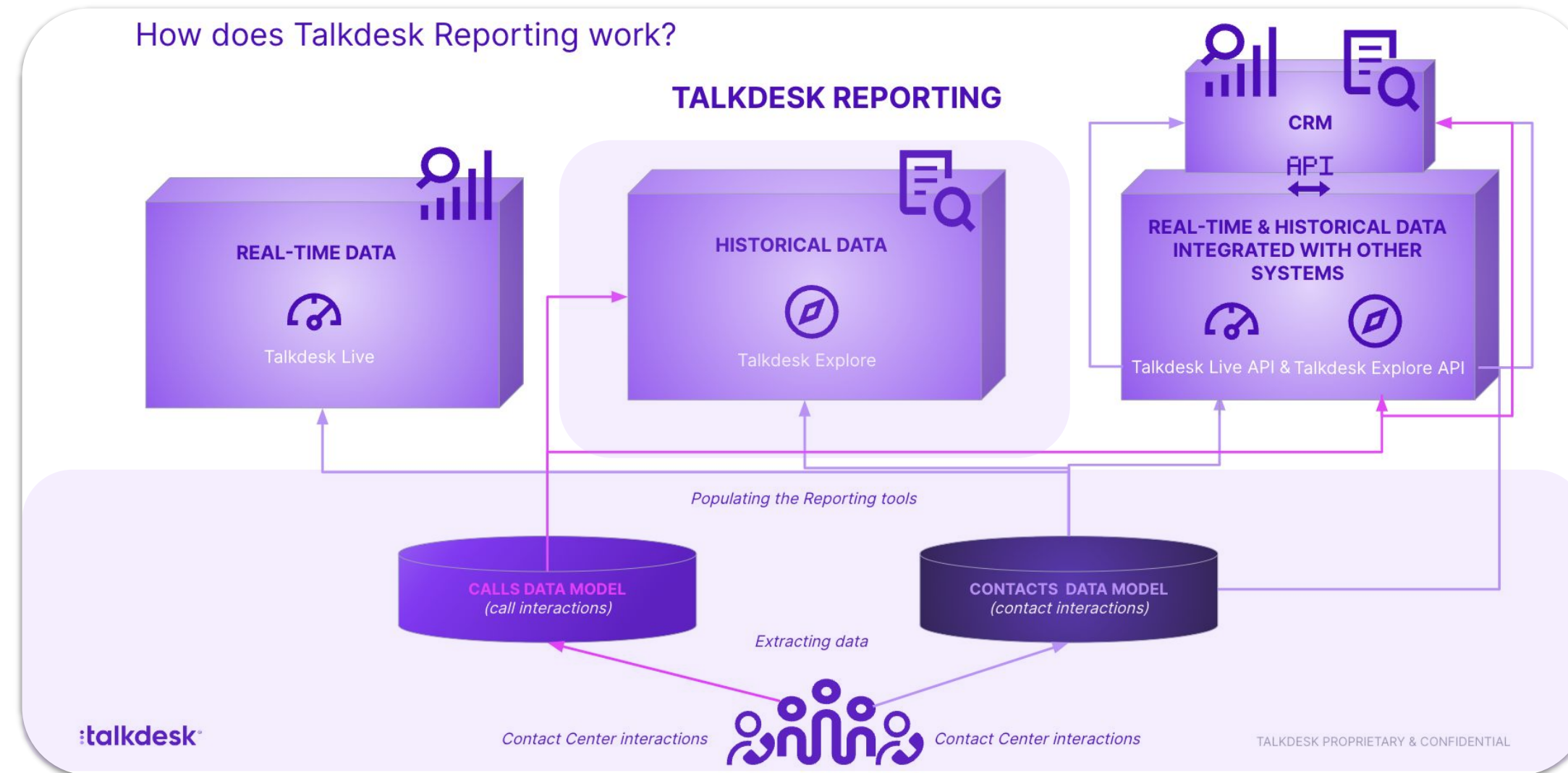
# What is Talkdesk Reporting?

Talkdesk Explore

 Talkdesk Explore enables you to collect, consult and organize your contact center historical data. This way, you can significantly impact your agents' performance by targeting the right data at the right time. To extract the details of each interaction, Explore uses the Calls and the Contacts data models.

You will see several sets of Reports and Dashboards. Each one offers advanced filtering and search options so that you can quickly find the data that you are looking for:

- A dashboard allows you to quickly check related metrics, based on the filters that you apply.
- A report displays the answer to a single data question, allowing you to view, export, and share more details about that data.

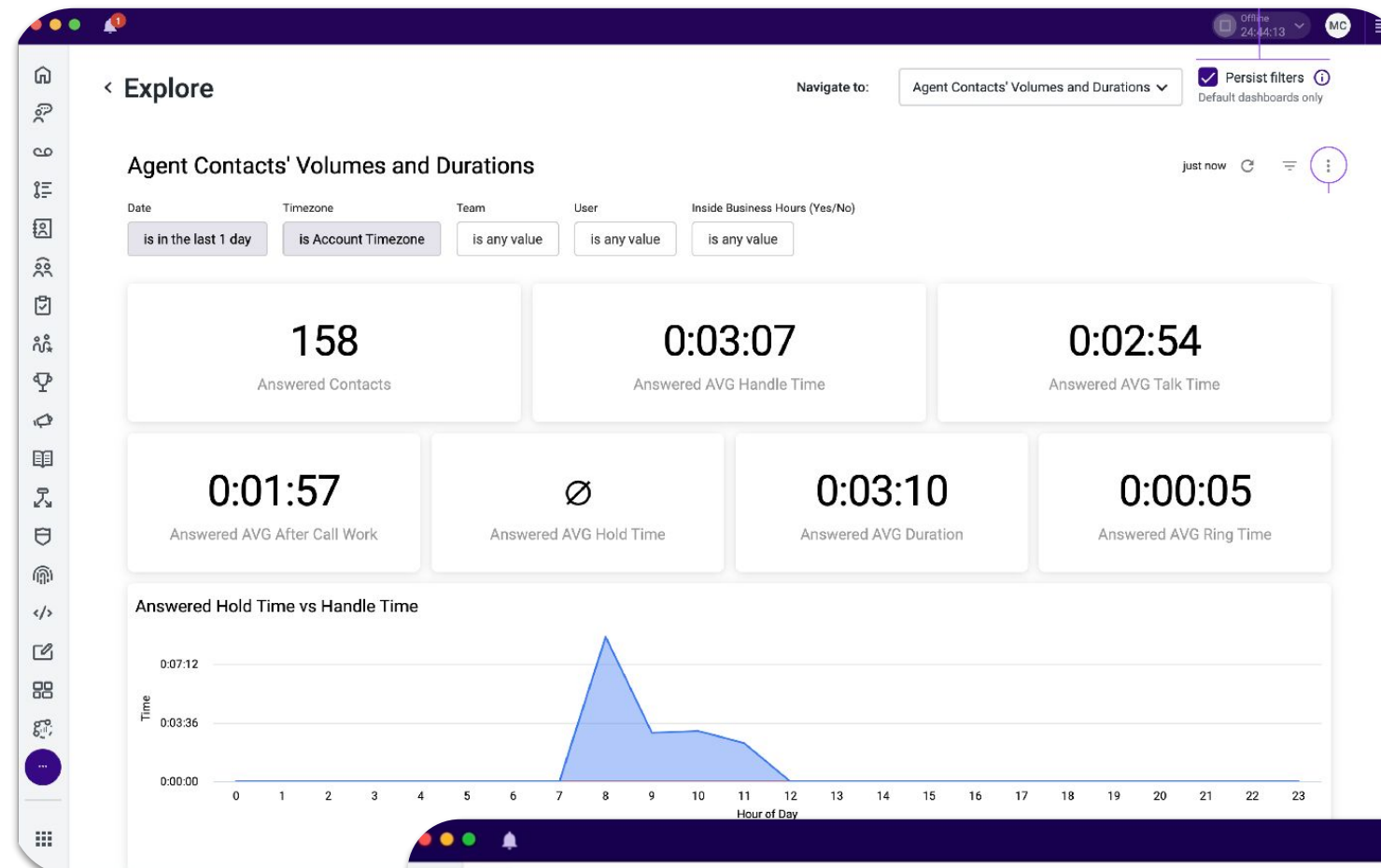


# What is Talkdesk Reporting?

## Talkdesk Explore

There are more than 15 default dashboards available in Explore:

- Agent Details.
- Agents.
- Agent Contacts' Volumes and Durations.
- Calls.
- Contacts' Service Level.
- Dispositions.
- Inbound.
- Inbound Contacts' Volumes and Durations.
- Number Details.
- Numbers.
- Outbound.
- Outbound Contacts' Volumes and Durations.
- Ring Attempts.
- Recent Activity Multichannel.
- Service Level.



There are more than 30 default reports available in Explore:

- Accounts Breakdown Report.
- Activity Report.
- Agents Breakdown Report.
- Agents Inbound Dispositions Report.
- Agents Outbound Dispositions Report.
- Agents Report.
- Agents Status Report.
- Audit Logs Report.
- Calls Report.
- CSAT Messages Report.
- Inbound Dispositions Report.
- Numbers Breakdown Report.
- Numbers Inbound Dispositions Report.
- Numbers Outbound Dispositions Report.
- Numbers Report.
- Outbound Dispositions Report.
- Studio Flow Execution Report.
- Tags Breakdown Report.
- Contacts' Ring Groups Summary.
- Contacts' Volume by day of the week.
- Contacts' Volume by hour of the day.
- Ring Attempts Summary.
- Teams' Contact Summary.
- Users' Contact Summary.

**Calls**

Date: is in the last 1 day | Timezone \*: is Account Timezone | Call Ring Group: is any value | Dedicated Line: is any value | Phone Number: is any value | Agent: is any value | Call Disposition: is any value | Interaction ID: is any value

Call Type	Interaction ID	Ring Groups	Dedicated Line	Call Start Time	Call End Time	Talkdesk Phone Number	Customer ID
✓	c82166fa83f44d79bdb1fd0819130b		FALSE	2023-06-21 12:25:18	2023-06-21 12:26:22	+141581807 (Agentless Dialer Pumping Calls)	+1443
✗	a8c2e449ac8b42e996c633eff2ffc2	agents	FALSE	2023-06-21 12:22:39	2023-06-21 12:23:47	+131466499 (DS-DEMO)	+1541
✗	97a0a960d46f47cc90ead2540c009		FALSE	2023-06-21 12:20:24	2023-06-21 12:20:24	+141581807 (Agentless Dialer Pumping Calls)	+1443
✓	f0899a55af434acd94252bce9912fb		FALSE	2023-06-21 12:20:21	2023-06-21 12:23:23	+141581807 (Agentless Dialer Pumping Calls)	+1443
✓	c569f6372e4847de88f848723efbe4	talkdesk demos	TRUE	2023-06-21 12:20:19	2023-06-21 12:22:52	+141581807 (Agentless Dialer Pumping Calls)	+1443
✓	32fc0a9427a34947a16597ce92c5d		FALSE	2023-06-21 12:20:18	2023-06-21 12:23:20	+141581807 (Agentless Dialer Pumping Calls)	+1443
✗	d97ba853497d46beb072021e635d		FALSE	2023-06-21 12:20:17	2023-06-21 12:20:17	+141581807 (Agentless Dialer Pumping Calls)	+1443
✓	913d0408b1bb4b4ebc36a51bf0f19	talkdesk demos	TRUE	2023-06-21 12:15:25	2023-06-21 12:17:58	+141581807 (Agentless Dialer Pumping Calls)	+1443
✓	ef365c16a48445bca913fd6b879cb		FALSE	2023-06-21 12:15:21	2023-06-21 12:18:23	+141581807 (Agentless Dialer Pumping Calls)	+1443
✗	e48578b1b0bf46b69fc6aa41f5c544		FALSE	2023-06-21 12:15:20	2023-06-21 12:15:20	+141581807 (Agentless Dialer Pumping Calls)	+1443
✓	c2d7aeabbf57454a9dbc3f9294b2a		FALSE	2023-06-21 12:15:18	2023-06-21 12:18:20	+141581807 (Agentless Dialer Pumping Calls)	+1443
✓	47ea091f381a44d5eb966b08b8f840		FALSE	2023-06-21 12:15:18	2023-06-21 12:18:20	+141581807 (Agentless Dialer Pumping Calls)	+1443
✓	153d3b6fcf5349ae9f0550e17bef0a	talkdesk customer service	FALSE	2023-06-21 12:14:24	2023-06-21 12:26:37	+131466499 (DS-DEMO)	+1314
✓	858f697f14b34274b887383e8d70f5		FALSE	2023-06-21 12:10:30	2023-06-21 12:13:32	+141581807 (Agentless Dialer Pumping Calls)	+1443
✓	bc232fe5f4e94be8b8dda9308a676fa		FALSE	2023-06-21 12:10:24	2023-06-21 12:13:26	+141581807 (Agentless Dialer Pumping Calls)	+1443
✓	29b8775096714eecc07edabb8c1d0		FALSE	2023-06-21 12:10:21	2023-06-21 12:13:23	+141581807 (Agentless Dialer Pumping Calls)	+1443
✓	59d40b6aaf0b45bc9ef0368aee694f		FALSE	2023-06-21 12:10:19	2023-06-21 12:13:21	+141581807 (Agentless Dialer Pumping Calls)	+1443





# KNOWLEDGE SOURCES

Enhance your customer service team with Talkdesk Reporting. Use reporting tools to analyze historical and real-time performance data of your contact center. Make data-driven decisions, address issues proactively, meet requirements, and boost workforce productivity for better customer experiences and business outcomes.



## Academy Courses

### COLLECTION: [Reporting](#)

- [Introducing Reporting](#)  
Introducing Reporting: Extracting Data with Talkdesk
- [Reporting & Data Models Overview](#)  
Reporting & Data Models: Extracting Data with Talkdesk Live and Live API  
Reporting & Data Models: Extracting Data with Talkdesk Explore and Explore API  
Reporting & Data Models: Data Models - Contacts & Calls  
Reporting & Data Models: Getting Started with the Contacts Data Model  
Reporting & Data Models: Configuring the Reporting Component with Talkdesk Studio
- [Talkdesk Live](#)  
Live: Overview Recap  
Live: Customizing and Sharing Dashboards  
Live: Metrics Glossary
- [Talkdesk Explore](#)  
Explore: Overview Recap  
Explore: Custom Reports and Dashboards  
Explore: Getting Started with Custom Table Calculations  
Explore: Using Filters  
Explore: Best Practices for Custom Table Calculations
- [Live API & Explore API](#)  
Getting Started  
Introduction  
Creating OAuth Client Credentials  
Creating New Environments and Variables  
Authorizing Requests  
Creating Requests  
Introduction  
Explore API - Creating a "POST" Report Job Request  
Explore API - Making a "GET" Job Request  
Live API - Listing Available Queries with a "GET" Request  
Live API - Subscribing and Connecting to the New Subscription Stream
- [Troubleshooting Reporting](#)  
Troubleshooting Reporting



Estimated learning time: 6 hours





# KNOWLEDGE SOURCES

Enhance your customer service team with Talkdesk Reporting. Use reporting tools to analyze historical and real-time performance data of your contact center. Make data-driven decisions, address issues proactively, meet requirements, and boost workforce productivity for better customer experiences and business outcomes.

## Knowledge Base articles

- **Talkdesk Live**

- Talkdesk Live Overview
- Talkdesk Live: FAQ
- Outbound Live Campaigns
- Offline Agents List
- Missed Attempts Widget
- Outbound Live Agents per Campaign
- Longest Hold Time
- Unassigned Contacts List
- Live Monitoring: Overview
- Creating Talkdesk Live Dashboards
- Configuring Talkdesk Live Widgets: Overview
- Managing Live Agents and Live Contacts Widgets
- Managing Reporting for Call Waiting
- Sharing Talkdesk Live Dashboards
- Abandon Rate
- Abandoned Contacts
- Answered Contacts
- Arrived Contacts
- Editing Live Dashboards
- Service Level
- Outbound Contacts
- Not Connected Contacts (Outbound)
- Missed Contacts
- Longest Wait Time
- Live Agents List
- Live Contacts (Inbound)
- Live Contacts (Outbound)
- Live Contacts List
- Live Contacts in Progress (Outbound)
- Live Contacts in Progress (Inbound)
- Live Contacts in Queue
- Inbound Contacts
- Count of Agents Logged In
- Connected Contacts (Outbound)
- Avg. Wait Time
- Avg. Handle Time (AHT)
- Avg. Abandon Time
- Contacts, the New Data Model: what changed?
- New Contacts Data Model - New and Updated Metrics
- New Data Model Metrics Examples





# KNOWLEDGE SOURCES

Enhance your customer service team with Talkdesk Reporting. Use reporting tools to analyze historical and real-time performance data of your contact center. Make data-driven decisions, address issues proactively, meet requirements, and boost workforce productivity for better customer experiences and business outcomes.

## Knowledge Base articles

- **Talkdesk Explore**

- Talkdesk Explore Overview
- Talkdesk Explore: FAQ
- Connections Executions Dashboard
- Reporting Data Access and Visualization
- Explore API Calls Report: Overview
- Explore Duplicate Custom Reports
- Explore New Landing Page Overview
- Explore Layout Update
- Team Scopes and Queue Scope Results
- Creating and Managing Pivot Tables in Microsoft Excel
- CSV Files and Regional Settings
- Creating Schedules
- Customizing Visualizations
- Datasets and the Data Dictionary
- Default Reports
- Downloading and Sending Dashboards
- Downloading and Sending Reports
- Editing Options for Visualization Tables
- Creating Custom Reports in Talkdesk Explore
- Creating Custom Dashboards in Talkdesk Explore
- Sharing Custom Reports in Talkdesk Explore
- Filtering Dashboards and Reports
- Filters and Filtering in Create
- Managing your Explore Reports and Dashboards
- Setting Up a Visualizations Heatmap Table
- Timestamp Formats
- Agent Details Dashboard
- Agents Dashboard
- Calls Dashboard
- Dispositions Dashboard
- Inbound Dashboard
- Number Details Dashboard
- Numbers Dashboard
- Outbound Dashboard
- Service Level Dashboard
- Custom Table Calculations (Functions): Overview
- Custom Table Calculations (Functions): Creating Expressions
- Custom Table Calculations (Functions): Formatting
- Contact Level Filtering in Explore (New Data Model)
- New Data Model Dashboards
- New Data Model Reports
- 401 Authentication Error in Explore





# Reporting: Live & Explore

## Hands-on & Step-by-step guides

During the Customer Enablement live sessions you were able to perform hands-on exercises.

The goal of this hands-on is to get you acquainted with Talkdesk Reporting, specifically with Talkdesk Live for real-time metrics and Talkdesk Explore for historical data.. By the end of this hands-on activity, you will understand how to create and edit Live dashboards using the available widgets for today and live metrics, and how to filter Explore default reports and dashboards. In case you have purchased the Reporting Custom product, you can also learn how to customize Explore reports and dashboards.

**In case you want to practice or repeat your hands-on, you can review your session recording or you can find in the following pages Call Data Model, Contacts Data Model, Live, and Explore step-by-step guides.**

**To easily find the solution for your hands-on exercise about Live and Explore, consult the following pages**

1/4

For the hands-on, apply the below-required criteria based on the existing Talkdesk configuration from your environment.

### LIVE

- Launch your Talkdesk Agent Workspace and make a handful of test calls (Inbound and Outbound, VM if applicable). This will generate data on your account and help visualize the offerings in the selected reports. ([page 108](#))
- Customize Talkdesk Live for Wallboard/Dashboard Use
  - Click the cog wheel in the widget and explore the Widget settings ([page 111](#))
  - View what is available in Preferences ([page 112](#))
  - View what is available in Filters ([page 113](#))
  - Edit and customize and click save ([page 113](#))
- Make some additional test calls to view your dashboard to see activity real time ([page 108](#))

### EXPLORE

- Explore the landing page
  - The landing page can be filtered by Default reports, Default dashboards and ecen reports created (included with the Create product). You also have the ability to search by report name or type. ([page 117](#))
- Research Default Reports and Dashboards ([page 118](#))
  - Based on the metrics that matter to your Contact Center, explore the reports and find one that may match your metrics.
  - Locate and run the report ([page 119](#))
  - Explore the report filters ([page 120](#))
  - Apply filters and re-run the report to reflect ([page 120](#))
  - Schedule your report ([page 121](#))
  - Download your report ([page 133](#))

