Work with the Conversational Agents dashboard

Content updated: 08/15/2026

This article is designated for administrators.

About

The **Conversational Agents dashboard** lets you filter agent analytics, review recent conversations, view conversation details, and export conversation data.

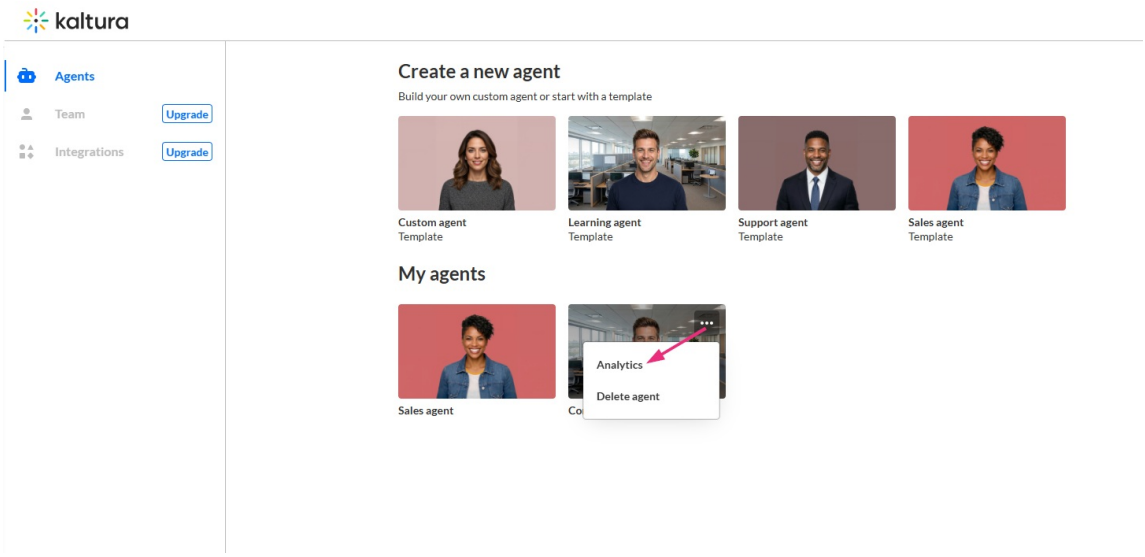
This article explains how to access and work with the dashboard. For information about the metrics and data displayed on the dashboard, see Introduction to Conversational Agent analytics.

Open the Conversational Agents dashboard

You can access the Conversational Agents dashboard in two ways:

From the Agents page

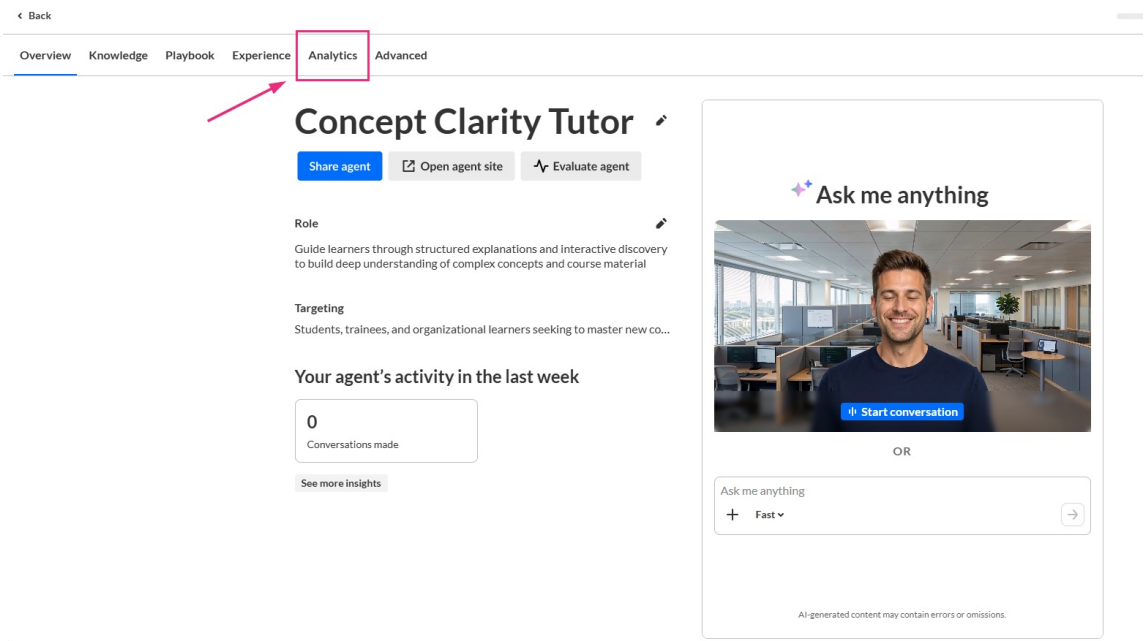
1. Locate the agent you want to review.
2. Click the **three dots** on the agent card and select **Analytics** from the menu.



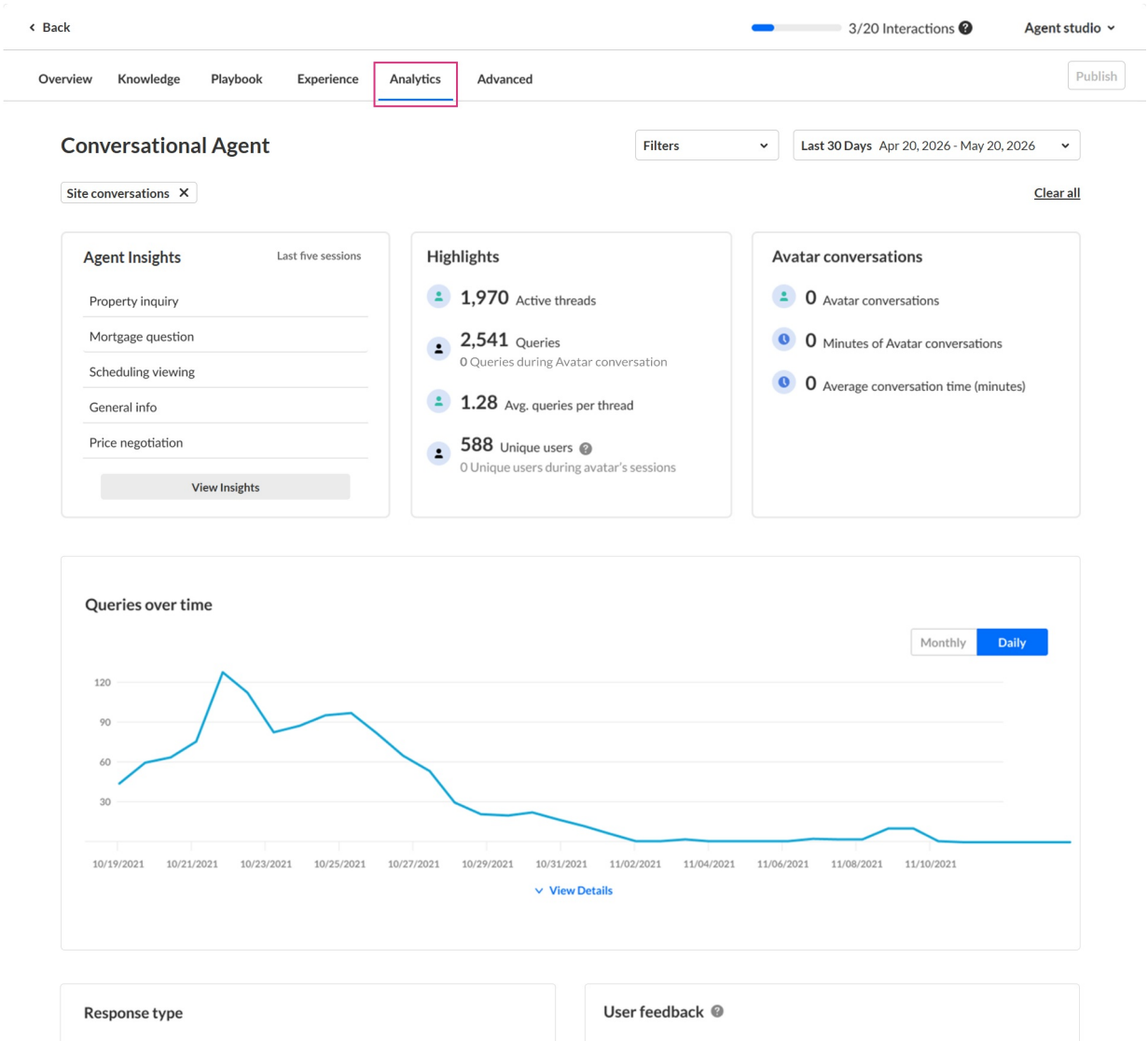
From an agent

1. Open the agent you want to review.
2. Click the **Analytics** tab.

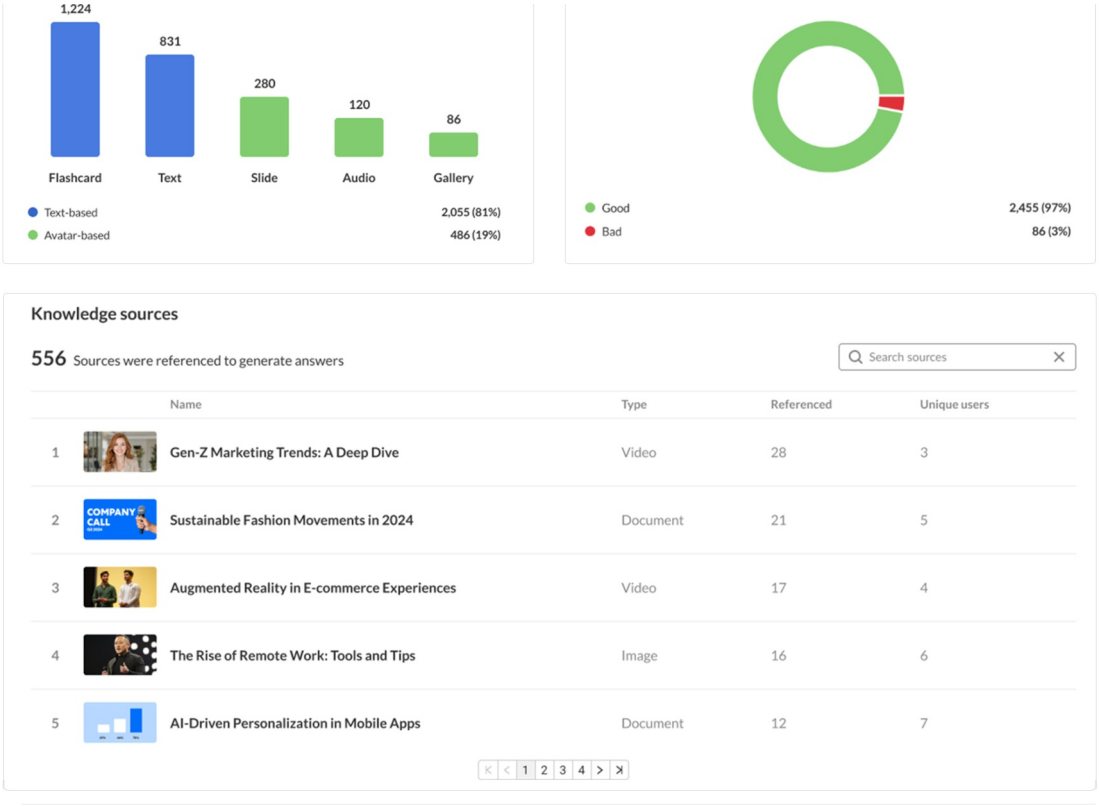
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The Conversational Agents Dashboard opens for the selected agent.

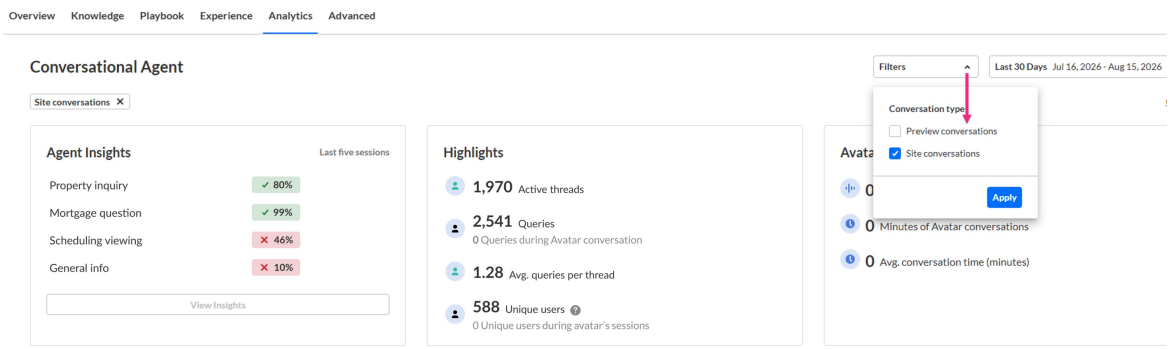


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Filter by conversation type

1. Click the **Filters** drop-down menu.



2. Select a **Conversation type**.

- **Preview conversations** - Conversations that occur when an administrator previews and interacts with the real-time avatar on the **Overview** tab. Preview conversations don't consume interactions. For more information, see Real time agent interaction.
- **Site conversations** - Conversations that occur when a user interacts with the agent on the agent site. These conversations consume interactions. This also includes conversations started when an administrator clicks **Open agent site** from the **Overview** tab. For more information, see Open agent site.

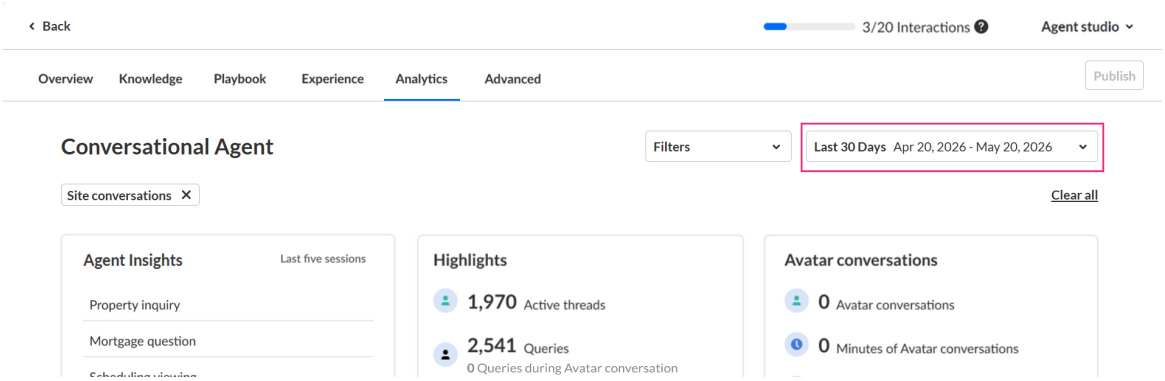
3. Click **Apply**.

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Filter by time period

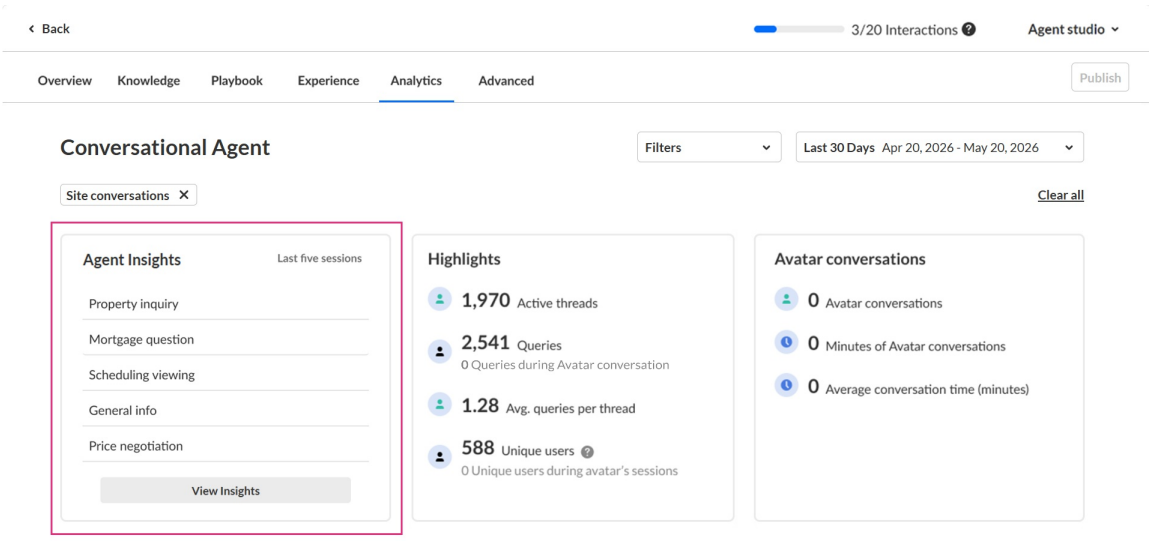
Select a time period from the date/time drop-down menu.

The dashboard updates to show data for the selected period.



View conversation history

The **Agent Insights** panel displays up to five of the agent's most recent conversation threads, ordered from newest to oldest. If the agent doesn't have any conversations yet, the panel is empty.



Click **View Insights** at the bottom of the Agent Insights panel to open the full thread history view for the agent.

View thread history

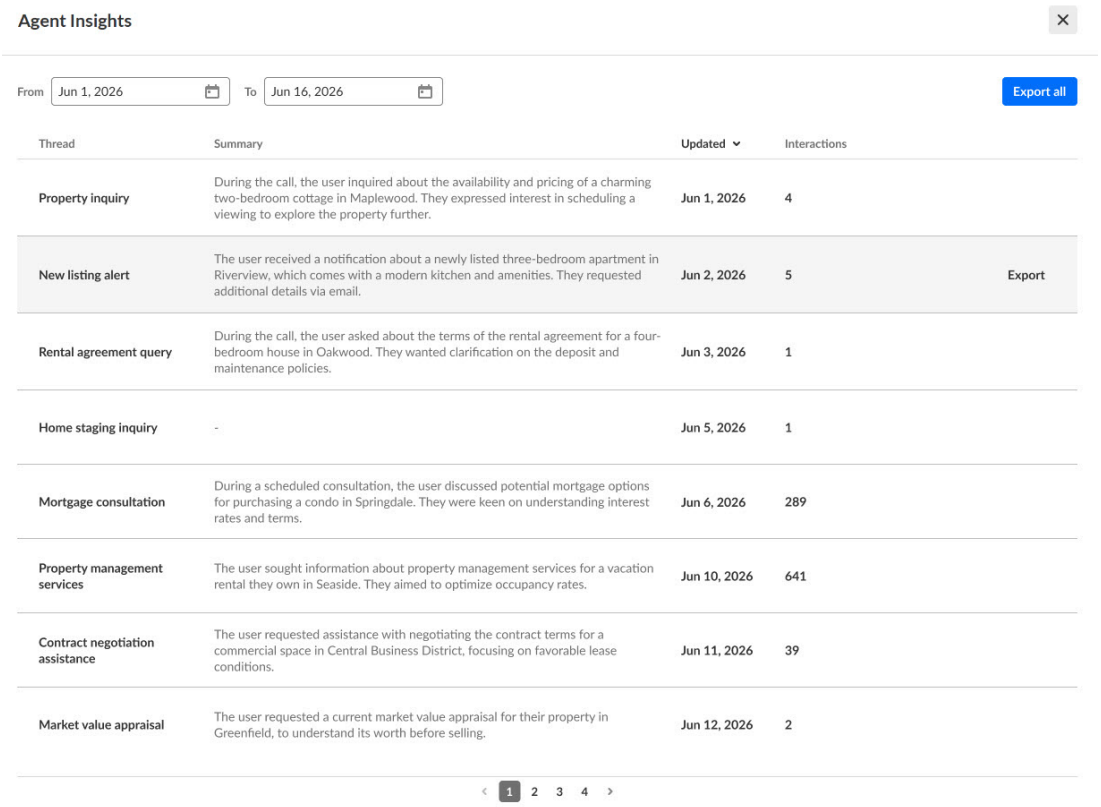
The thread history displays the agent's conversation threads. Use the **From** and **To** fields to filter the list by date.

The following information is displayed for each thread:

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- **Thread** - The title of the thread.
- **Summary** - AI-generated summary of the thread, If no summary is available, this will be blank.
- **Updated** - Date of last interaction.
- **Interactions** - Number of interactions in the thread.

If the results span multiple pages, use the pagination controls at the bottom of the page to view additional results.



Click a row to open the thread details.

View thread details

The top of the thread details view includes the following information:

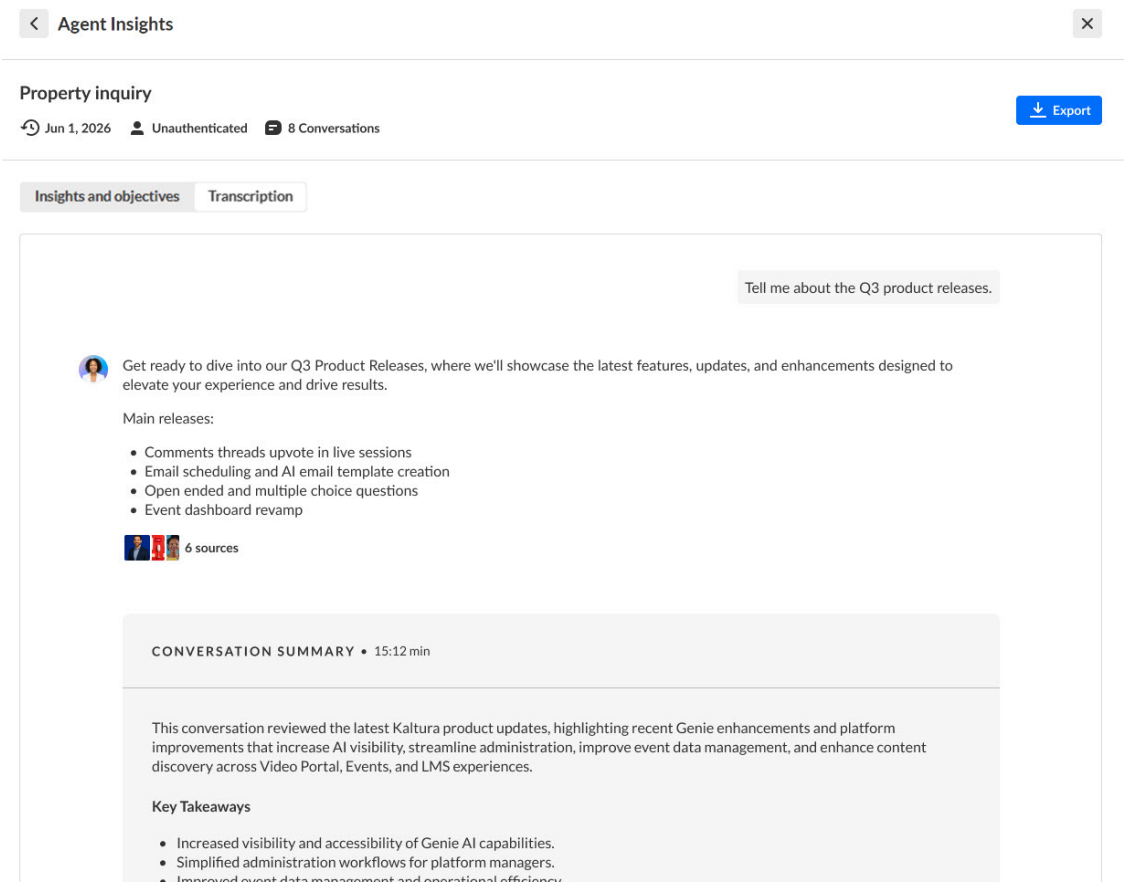
- Thread title
- Date of last interaction
- User's email (if unavailable, 'Unauthenticated' is shown)
- Number of interactions in the thread

The thread details view includes the following tabs:

- **Insights and objectives** - Coming soon

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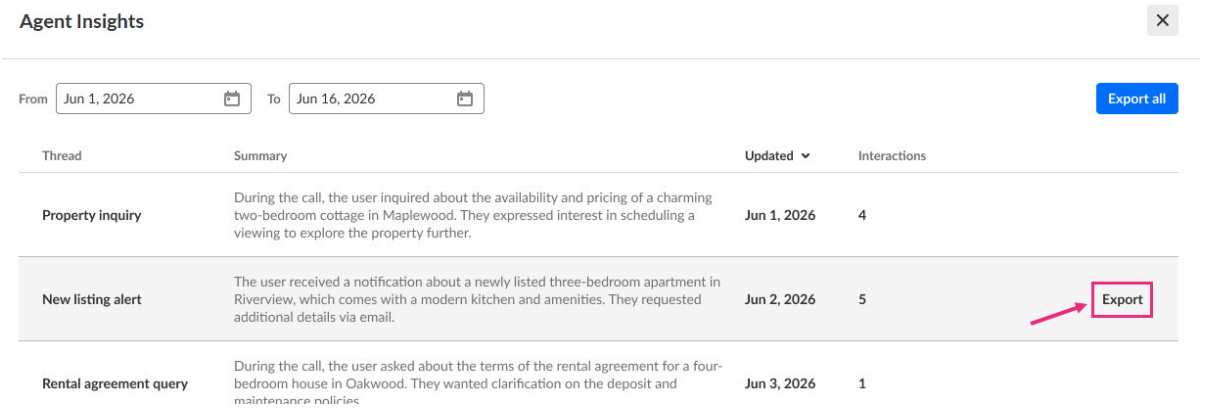
- **Transcription** - This is the primary tab for reviewing thread content.



Click the back arrow to the left of **Agent Insights** or the 'X' in the upper right corner to return to the full thread history view.

Export a single thread

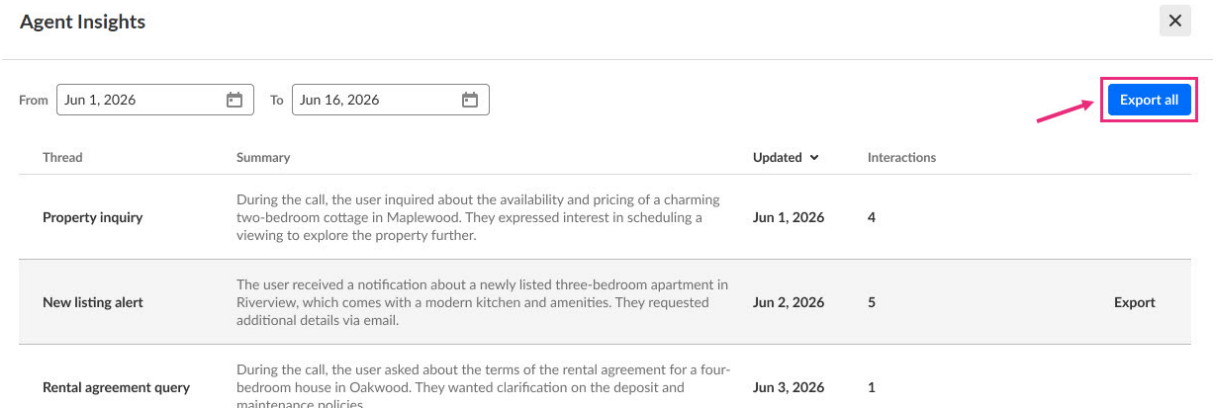
You can export a thread from either the thread details view or the full thread history. See also Downloading your data.



Export a complete filtered thread list

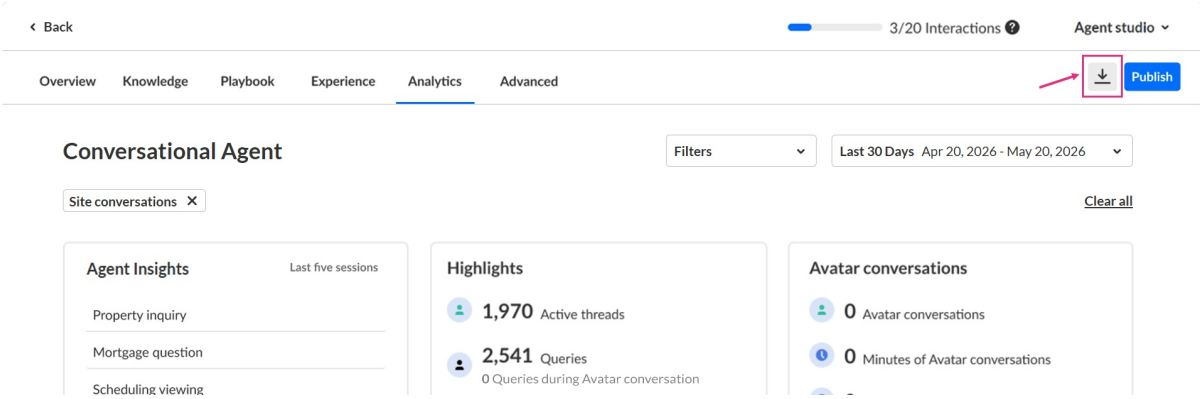
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You can export all threads that match the filters currently applied to the thread history. See also Downloading your data.

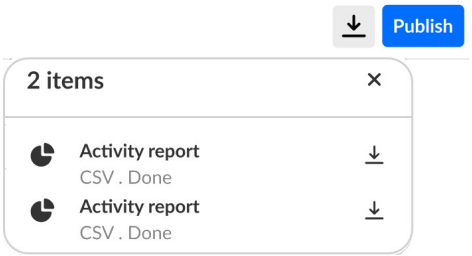


Download exported data

When an export is complete, the CSV file is available from the **Download** button on the **Analytics** page.



1. Click the **Download** button. Items available for download display.



2. Select the files you want to download.

   You receive confirmation that your items were downloaded successfully.

Kaltura does not use customer data to train its AI models. To learn more,

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