Analytics Knowledge Base

Customer sharable solution articles for Analytics are available here: [Freshworks Analytics Knowledge Base]().

This page is in addition to the above and contains FAQs related to the Analytics platform which can be used by all customer-facing GTM teams (for example, CSMs, Onboarding teams, TAMs, and SEs) to better understand the features and functionalities. Hopefully, this will help to answer customer questions and can act as a one-stop destination for all Analytics related questions. If you have a question that's not already listed and if you think that it should appear on this page, please leave a comment and we will add it here.

FUP (Fair Usage Policy)

I'm seeing a banner on the Analytics landing page saying my reports are to be trashed because of FUP violations. Will my reports be lost?

No, there won't be any immediate impact on your reports. It's business as usual for you till Nov 5th, 2024. You will see this banner for FUP violation messages if you approach or exceed FUP limits. It's recommended to adjust your usage patterns to stay within the limits after Nov 5th, 2024. After Nov 5th, 2024, reports that violate the Fair Usage Policy will be moved to the Trash folder, where they will remain for another 180 days before being permanently deleted.

Where can I find the release notes and solution articles related to FUP?

- Release notes: Freshservice Release Notes - May 2024
- Solution article: Fair Usage Policy (FUP) for Freshservice Analytics

What is FUP? And why is it needed?

We are implementing safeguards to some of our existing analytics capabilities to ensure you have an uninterrupted, performant, and smooth reporting experience.

Fair Usage Policy (FUP) promotes a fair and consistent experience for all Freshworks Analytics users by:

- Ensuring your reports load within a designated SLA
- Maintaining optimal platform performance for all users
- Preventing performance decline due to excessive resource utilization

We are committed to providing a reliable and scalable analytics platform for all our customers. FUP is an essential step towards achieving this goal.

It is not possible for me to resolve violations for every single report, because I have too many reports. What should I do?

Most of your reports might have similar violations. The steps that you perform for a single report will be the same that you will perform for all your other reports. For example, earlier you could create reports without a date range filter. However, now you must define a report-level Date Range filter. You can resolve such violations till the date that is displayed in the banner (typically, next 6 months).

There seems to be an indication of a maximum date range highlighted in the "FUP violation recommendations". Is there a maximum limit on Date Range for my reports?

Under FUP, all reports will have a maximum allowed Date Range of 24 months (2 years). However, this limit does not apply to data exports, where you will continue to have complete access to all your raw data to be exported at any point in time. The 24 months limit is only for visual reports in Analytics.

How do I add a Date Range filter?

At both the report and page levels, users have the option to create date range filters, which apply to the entire report or only to the specific page. A date range functions as a filter that influences the data retrieved within those specified periods.

- To add a report-level date range, navigate to **Filters** → **Report Filters**, and then click **"+ date range".** This filter will apply to any metrics you create within this report.
- To add a page-level date range, navigate to **Filters** → **Page Filters**, and then click **"+ date range".** This filter will only apply to metrics you create within this page in the report.

To learn more about the different types of filters, Date Ranges or Date Range Dimension, please check [this article](#).

What happens if I enable the *"Apply to all metrics in this report"* checkbox?

Users can utilize the *"Apply to all metrics in this report"* checkbox available within the report-level date range. This feature ensures the application of the report-level date filter to the entire report down to all the metrics. You will notice the default Date Range Dimension filter automatically enabled across all metrics in the report when this checkbox is selected. In this example, the Date Range Dimension is mapped to the Created Date. This is configurable and can be replaced with any other date fields as needed.

To learn more about the different types of filters, Date Ranges or Date Range Dimension, please check this article.

How do I add a widget to a report or remove a widget from a report?

To add widgets to a page that belongs to a report,

- Make sure you are in the report edit mode (by clicking on **Edit** button)
- Click the "**Add Widgets**" button to add reports

To remove an existing widget,

- Make sure you are in the report edit mode (by clicking on **Edit** button)
- Select the widget you want to remove
- Click on the 3-dots on the widget and click "**Remove Widget**"

To learn more about widgets, please check this article.

How do I add a metric to a widget or remove a metric from a widget?

To add metrics to a widget in report,

- Make sure you are in the report edit mode (by clicking on **Edit** button)
- Add or select the widget where you wish to add the metric (a default metric will be added for you if this is a new widget)
- Click the "**+ metric**" button to add more metrics

To remove an existing metric,

- Make sure you are in the report edit mode (by clicking on **Edit** button)
- Select the widget from which you want the metric to be removed
- Click on the 3-dots on the metric and select "**Delete**"

To learn more about metrics, please check [this article].

There seems to be an indication of a maximum metrics that can be added to a widget in the "FUP violation recommendations". What is the maximum limit?

Under FUP, all widgets will have a maximum number of metrics that can be added. This limit will be highlighted in the "FUP violation recommendations" pop-up. Please follow the recommendations to resolve this.

There seems to be an indication of a maximum widgets that can be added to a report in the "FUP violation recommendations". What is the maximum limit?

Under FUP, all reports will have a maximum number of widgets that can be added. This takes into account the sum of all the widgets you have across all the pages in the report. This limit will be highlighted in the "FUP violation recommendations" pop-up. Please follow the recommendations to resolve this.

How can a customer get FUP exception for higher limits?

A support ticket (L2) can be raised with *Category = Analytics, Sub-Category = FUP , Item = FUP Exceptions* for the product team to validate the customer account/MRR/importance/urgency and route it to the Analytics team to provide an exception for higher FUP limits.

Schedules

What happens to existing schedules when the creator of the schedule is deactivated?

If the user who created schedules is deleted, then all the schedules owned by that user are automatically stopped.

How can we change the ownership for schedules?

We can't change the owner of an existing schedule. If the user who created schedules is deleted, then all the schedules owned by that user are automatically stopped. If there's a need to keep these schedules active, then these must be created by another user.

When a report owner changes, how does that affect the schedules created by that report owner on that report?

If the ownership of a report changes, then all schedules created by the previous owner on that report are automatically stopped. The new owner of the report must create new schedules on the report.

Can we schedule custom reports and get them over API?

You can schedule custom reports to be received via email only. However, you can schedule data exports which are available through both API and email.

Why do some users receive reports on emails even when all the scheduled reports are disabled?

This usually happens when a user creates a schedule for a private report. Check for any private reports of the user that have schedules enabled.

Can curated reports be scheduled?

Although there is currently no option to schedule reports, they can be subscribed by users and they would receive them on mail. You can subscribe to curated reports by opening them and clicking 'Subscribe report' under the Export menu.

Ownership

Can the owner of a report be changed?

Yes, ownership of reports can be changed as long as the existing owner is a valid user.

Who can change/transfer ownership of reports and how?

Only the owner of a report can change/transfer the ownership to another user. This can be done by clicking the Share option in the Analytics header bar and configuring the ownership options in the Share Report pane.

What happens to existing private reports created by a user who is deleted from the system?

- All existing private reports created by the deleted user automatically move to trash.
- These private reports can't be retrieved from trash.
- All schedules on these reports will also automatically stop.

What happens to existing shared reports created by a user who is deleted from the system?

- All existing shared reports created by the deleted user automatically move to trash.
- Users who these reports are shared with, can retrieve them from trash.
- All schedules on these reports will also automatically stop.Users who these reports are shared with, must create these schedules again.

Sharing

What's the report sharing feature?

Report sharing allows you to share reports with selected users of your choice. You can provide the following access levels on the report to these users:

- **Can View:** Can only view the report; can't edit the report nor control access to the report for other users.
- **Can Edit:** Can view and edit the report; can't control access to the report for other users.
- **Can Manage:** Can view, edit, and control access to the report for other users.

Can report sharing be done for individuals or groups?

Yes, reports can be shared with both individual users and user groups (for example, specific teams or users with a specific role or in a specific territory).

What appears in the Shared Reports section?

If owners/users share a report with some other users, only those other users will see the shared reports in the **Shared Reports** section. For the owner/user, these reports will appear in the All Reports and My Reports section.

The definition for each section is as follows:

- **All Reports:** Every report that the user has access to.
- **My Reports:** Reports which are created by the user. These could be public, private, custom, or shared.
- **Curated Reports:** Predefined reports that are generated out of the box for the benefit of users.
- **Private Reports**: Reports which are private for the user and aren't shared with anyone.
- **Shared Reports:** Reports created by others which are shared with the user (not shared by the user).

What is the difference between 'Can Edit' and 'Can Manage' permissions in report sharing?

- '**Can Edit**' provides the ability to make changes to the shared report.
- '**Can Manage**' provides an additional ability to manage access controls for the users of the report.

Can each report or dashboard have a specific unique URL so that customers can find it easy to share or reference it to their other team members?

URLs are available within the product (users need access to the product instance) for all Freshworks products. Public URLs, however, aren't currently supported.

Is there a way to collaborate on reports?

No, this feature is currently not supported.

Data Exports

How do incremental data exports work?

Incremental data exports include only the information that was created or updated after the previous export. Consider the following scenario:

- Module on which export is created: Tickets
- Schedule creation time: 1 June, 2024; 3 pm
- Schedule time: Daily; 5 pm
- First export on: 1 June, 2024; 5 pm

This first export data will include all tickets created since inception till 1 June, 2024; 5 pm.

Let's assume that between 5 pm on 1 June, 2024 and 5 pm on 2 June, 2024, the following changes occurred in the Tickets module:

- 100 new tickets were created
- 50 older tickets were updated

Second export on 2 June, 2024; 5 pm

This second data export will include records of the new 150 (100 created & 50 updated) tickets only which are created and updated since the last export. The same logic will apply to all subsequent exports.

Filters

Can filters be applied at widget level?

Yes, filters can be applied at multiple levels such as metric, widget, page, and report. Additionally, quick filters can be applied on widgets even by users with view-only access (if they are pre-configured by the widget creator).

Can filters be applied at the report level?

Yes, filters can be applied at multiple levels such as metric, widget, page, and report. Additionally, interactive filters can be applied during report creation at the report level as widgets in the form of lists, drop-downs, buttons, sliders and toggles.

What are interactive filters?

Do interactive filters apply to all widgets on the page?

Yes, interactive filters can be applied to all widgets on the page, including all metrics on the page.

Do interactive filters support metrics across modules?

Interactive filters are currently supported only for a single module. When you use interactive filters at a page or report level, ensure that all the metrics are from the same module.

Are nested filters supported in embedded widgets for bundle offerings?

Nested filters aren't currently supported for bundle offerings. For example, Support 360 (Omnichannel), Customer Service Suite (CSS), and Sales 360 (FW CRM) bundles don't support nested filters.

Custom Metrics

Are there any functional differences between custom metrics and default (out-of-the-box) metrics?

- Aggregate functions (for example, average, maximum, minimum, sum) aren't available while using a custom metric in a widget. However, these aggregate functions are available for default metrics.
- Default metrics are listed in the data dictionary whereas custom metrics aren't.

Will my custom metrics and attributes also show up in the data dictionary?

Currently the data dictionary only lists the definitions of default metrics and attributes that are available out of the box. The formula of a custom metric or attribute can be viewed by navigating to the Edit section of the custom metric or attribute under Settings.

I see different values in the preview section of a custom metric compared to when I use it in the widget/report. Why is that?

The preview value, though calculated correctly, could be different from the actual value that shows up in the widget or report based on the difference in filter conditions applied on the widget/report. Also, the preview happens only for a sample of the data.

Can I create custom metrics using attributes from across multiple modules?

Yes, custom metrics can be created using attributes from across multiple modules. However, this feature is yet to be adopted by various products.

Curated Reports

Is there an option to sort curated reports based on a metric value?

Though there is a sort option based on a few attributes (such as Name, Modified By, Modified Date), there's currently no option to sort curated reports based on the report's importance/value/popularity/relevance/specific metric.

Is there an option to disable curated reports?

Curated reports can be enabled or disabled by product teams using the curated report configuration in the SSP.

Why do the curated reports deleted from staging and promoted to production still show up for customers?

If a curated report has been copied/modified by the customer and the copied/modified version is saved, then the copied/modified version will continue to appear for the customer even if the source curated report is no longer available within the product.

Why don’t the Freddy Triage reports appear for certain customers?

The Freddy Triage reports are curated reports that are enabled based on the pricing plans. See details here: [Measure the performance of Auto Triage using Reports.]()

Freddy Insights

How do users get into early access programs for AI-powered Analytics features?

Users can write to the PM POCs listed at the bottom of this page for early access.

Will Analytics have capabilities of forecasting for selective metrics like tickets, calls, chats, etc.?

Forecasting for select metrics is part of the Analytics roadmap but not planned for a specific quarterly release.

General

How does one reach out to the Analytics team to report an issue?

You can use the [#fp-analytics-help]() Slack channel to report an issue. Additionally, you can use the [#fw-analytics-product-updates]() Slack channel if you want to collaborate with POCs from various product teams.

How null values are displayed in Analytics?

NULL values appear as hyphens (— or - - -) in Analytics.

What is the current data latency (sync time) for Analytics?

The current data sync time is ~30 minutes. The delay is due to the time taken to process, transform, and store the data before it's available for reporting.

Does Analytics support real-time integrations with tools like Tableau or PowerBI?

This functionality is currently not available.

Does Analytics support sales oriented metrics like Sales conversions etc?

The Analytics Platform supports a wide range of metric types and calculations on the Self Service Portal (SSP). However, the metrics that are available for users in Freshdesk, Freshservice, or Freshsales are owned by the respective product teams. Feedback can be shared with the teams to incorporate other/relevant metrics.

Are single line text fields available for reporting?

Yes, single line text fields are available for reporting.

Is sorting supported for reporting?

Sorting (for example, viewing data in ascending or descending order according to the values or names of group-by attributes) is supported. Additionally, custom sorting is available. These options are under the Sorting section under Filters.

Does Analytics support customisation on currency fields?

Analytics supports number formatting of currency fields, so that amounts are represented in scale of Thousands, Millions, etc. Also, analytics adheres to the currency format (for example, US, EU) that's defined in the product and doesn't support deviation from this.

Is it possible to have a summary table for tickets and a sum total at the bottom of the table to sum up the data points?

Sub-totals & grand-totals across summary & matrix tables are available for Freshservice and Freshsales.

Is reporting possible on Custom Objects implemented in Freshdesk?

Yes, reporting is enabled for custom objects defined in Freshdesk.

Why doesn't the Unresolved Tickets metric not work beyond a certain point?

The Unresolved Tickets metric supports only 50 data points. For example, in any widget where this metric is used, you can only view upto 50 values for this metric over time. Due to this, the values show up as 0 after the 50 data points limit is exhausted. If there's a need to view more data points for this metric, you can use the following options:

- Use Unresolved Tickets metric in another widget to view.
- Change the group by condition to result in a lower no. of data points. For example, if you are grouping your data by days, you can consider grouping by weeks and so on.

How does Analytics API integration with Power BI work in terms of time taken to connect? Is it required to connect this API everytime or does it refresh automatically?

The API integration with Power BI is immediate. No, it is not required to manually connect to the API always For more details, refer to the solution article here: https://support.freshworks.com/en/support/solutions/articles/50000001081-exporting-data.

Can users view the time till which data is fetched into a widget/report?

Yes, the Last Updated Time (DB Updated Time) feature allows users to view the last updated time when data was refreshed and correspondingly the metrics in the widget/report were computed. This tells them if the data on the report is fresh or stale.

I used to be able to view certain reports shared with me. However, I can no longer view them. What could be the issue?

You can check if:

- Your permissions to view the reports have been revoked.
- The user who had shared the reports is deleted/deactivated. In such cases, the reports created by the user would have moved to trash and you can no longer view them. To view, you must first recover these reports from trash.