freshworks

Analytics User Guide

Welcome to Analytics!

Unlock the full potential of your Analytics module by understanding how to best it to stay on top of your service-desk metrics and make data-driven decisions to improve efficiency.

This document aims to help the users get familiar with the Analytics module and help them navigate easily through all the features.

**Let's begin your journey.**

Definitions and Terminologies

Contents

Understanding Reports & Widgets

Reports

Click on the report to open it.

A. **Clone –** Users can clone and rename a report from the option and build upon that report

B. **Help –** The help section has various guides on creating and editing a report or widget. We have also curated a list of FAQs to help our users navigate the reports easily

C. **Subscribe –** Subscribe to a report and receive regular emails. Users can set the frequency to daily, monthly, or weekly and pre-set a time

D. **Export –** Users can export the report and receive a CSV file in their inbox

E. **Schedule –** Users can schedule a report to be sent to their inbox or to someone in their team who has access to analytics

F. **Present –** Present the report to a wider audience using this feature

G. **Viewing/Editing –** By default, this is set to Viewing. Users can edit a report by clicking this and switching into 'Editing' mode
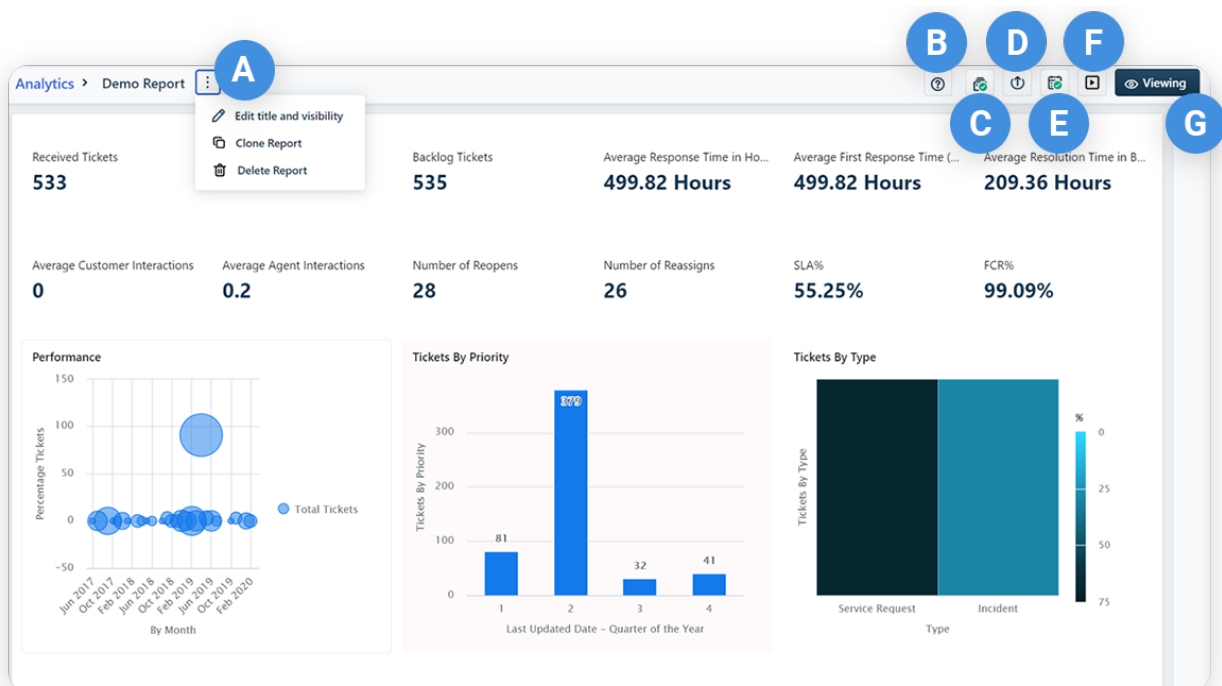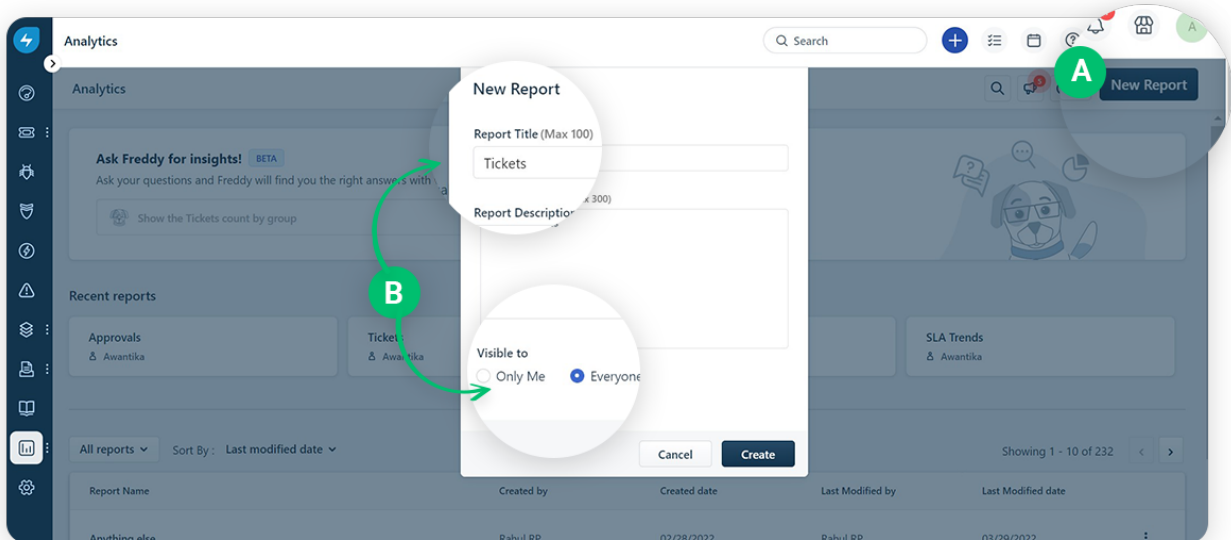
Widgets

Click on the widget to open the widget page.

A. **Favourites –** A widget can be marked as favourite by clicking on the star icon right next to the widget's name on the header. User can bookmark upto eight widgets

B. **Clone –** Users can rename or clone a widget

C. **Help –** This section contains a few small videos that can help users easily create and navigate a widget

D. **Subscribe –** Users can subscribe to a widget and get regular emails

E. **Export –** Users can export the widget either in CSV or PDF format

F. **Schedule –** Users can schedule a report to be sent to their inbox or to someone in their team who has access to analytics

G. **Viewing/Editing –** By default this is set to Viewing. Users can edit a report by clicking this and switching into 'Editing' mode

H. **Charts –** Users can select the type of chart from this section. Analytics has 20+ chart types which are available based on choice of the combination of metrics and group-by options

I. **Show Underlying Data –** Users can use this to view the data based on which the graph/widget was created
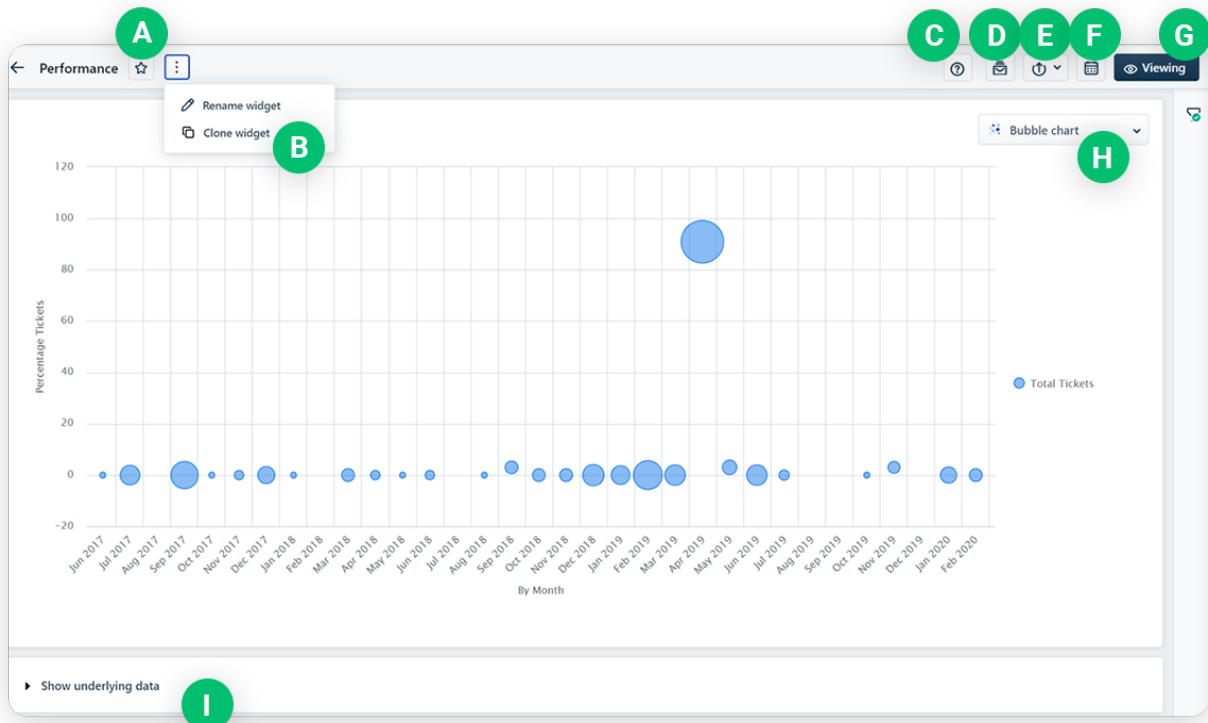
Creating Custom Reports

A. To create a new report, click on the '**New Report**' option on the home page

B. Add a title to the report and set the visibility settings

A. Add widgets to the report to measure a metric

B. Add filters to all the widgets in the report for deep-diving into metrics

C. Style the report and set standard styles for the widgets

D. Use the Format option to change the canvas size of the report, display mode, and grid settings
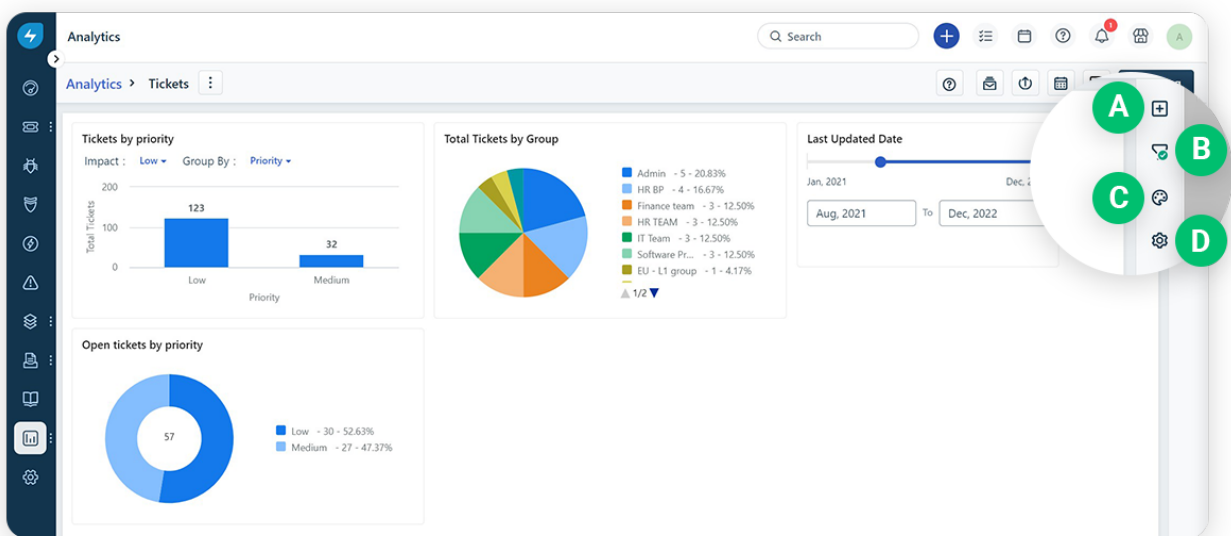
Creating Custom Widgets

- Click on the report in which you want to add a widget. It will open a page as shown below. This shows multiple widgets that are present in the report
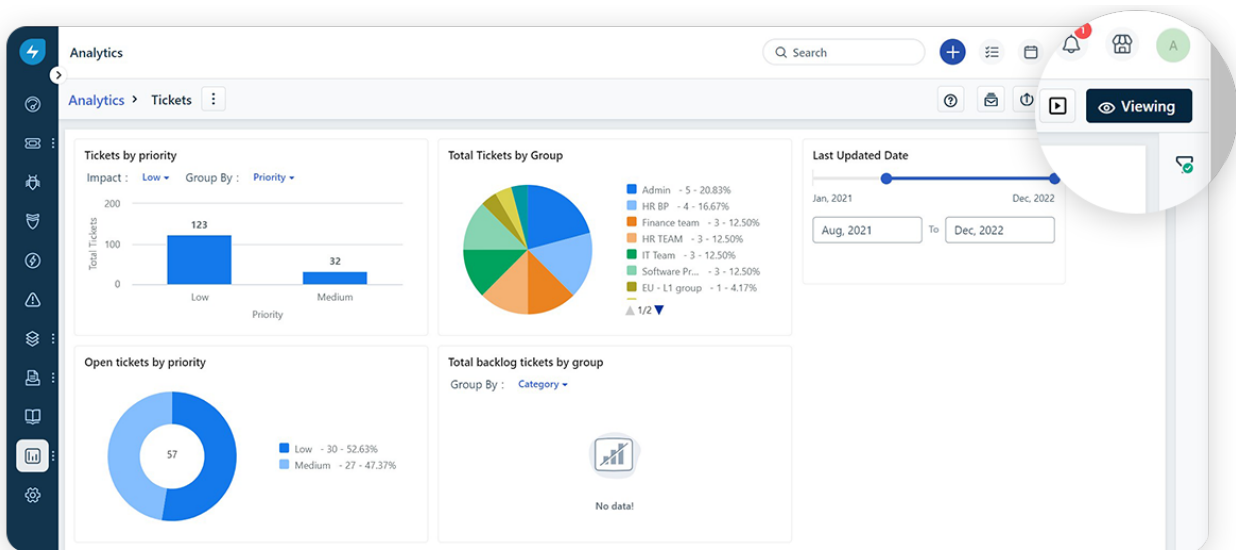
- Click on the 'Viewing' tab on the top right corner of the page (as marked in the image above). It will immediately change to **'Editing'** from 'Viewing', and users will get four options just below the tab (See image below)
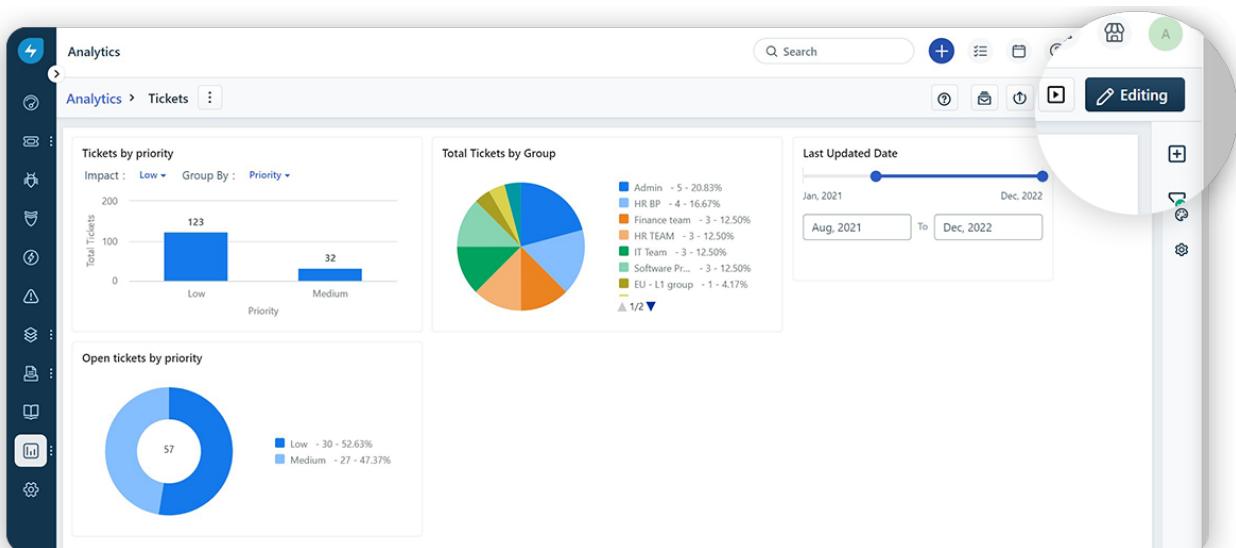
- Click on the **+ sign to add a new widget**. You will get to the Add Widget option
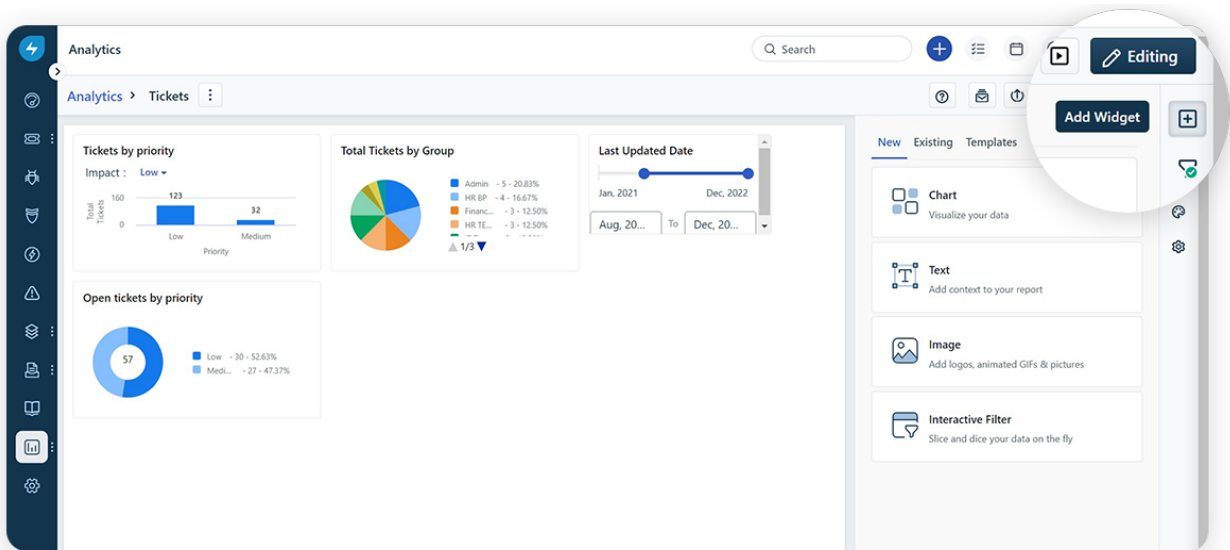
- Users can
  - Either create a new widget from scratch using the '**New**'
  - Use an already created widget in the new report using '**Existing**'
  - Create a widget from a list of 'Templates' present in the module

Creating New Widgets using 'New'

- Add a new widget either in the form of a chart, text, or an image from the **'New'** section
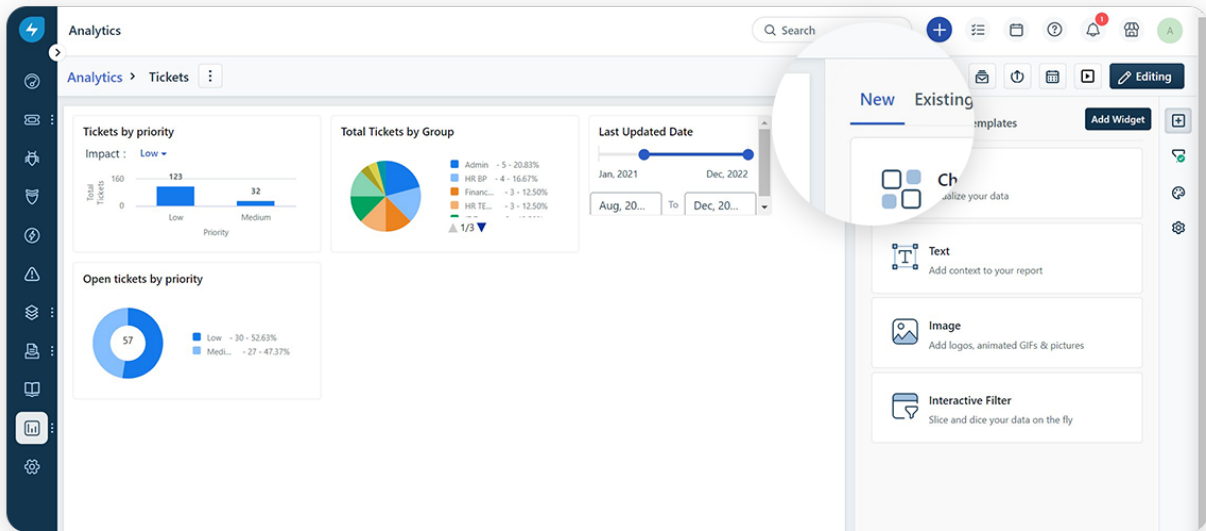
- Drag the chart, text or image option from the right side of the screen onto the reports section and position it accordingly

- Save the report and then click on '**Add Chart**' option as shown in the image
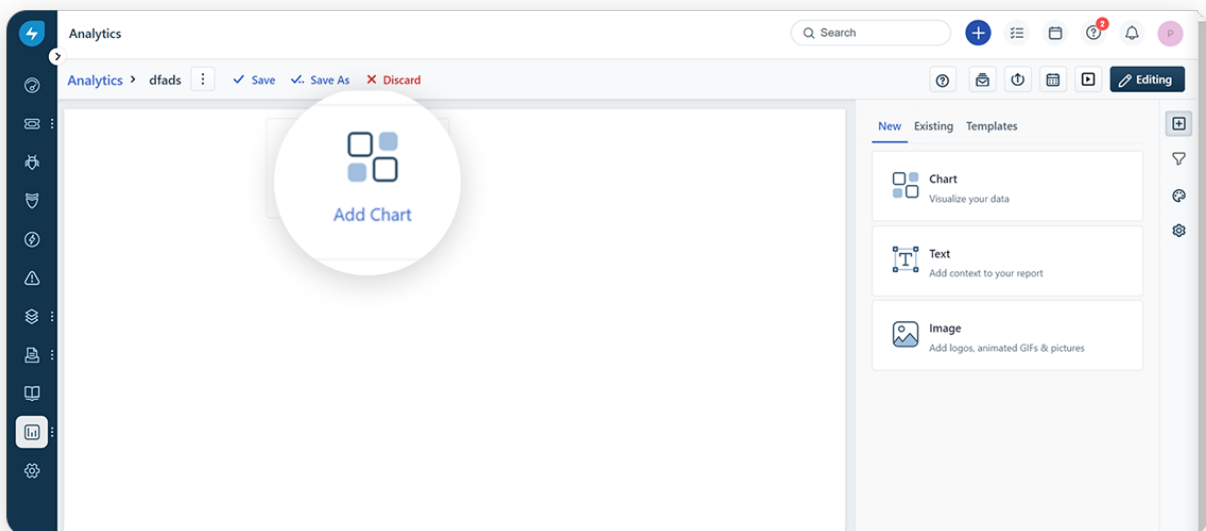
- Add name to the new widget, and then choose the modules from which you want to measure the metric
- You can also choose to add a description to the metric
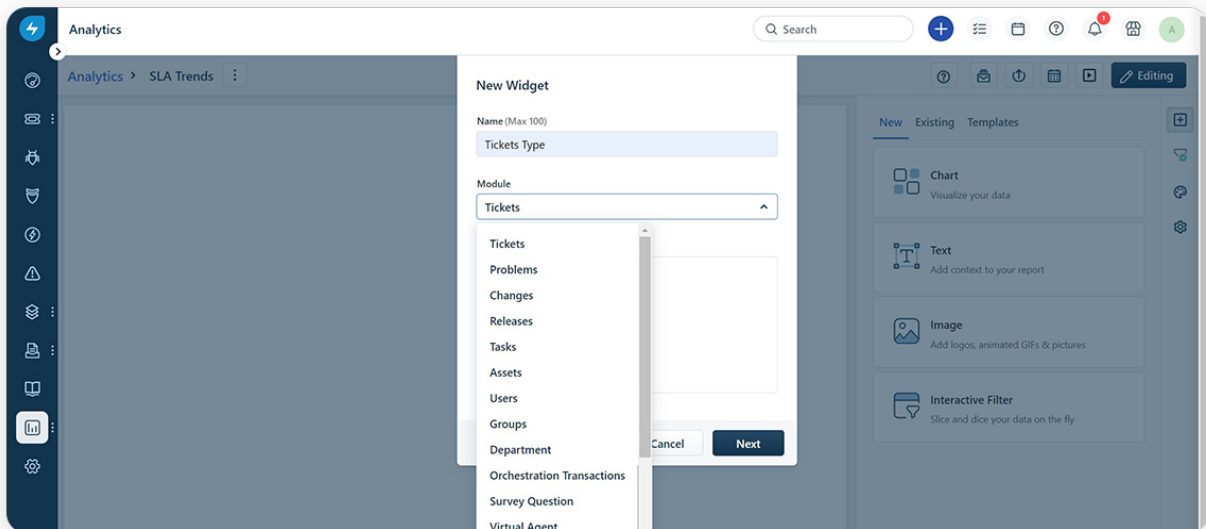
- Click on the '**Configure Widget**' option or click the configure icon on the right side of the screen. It will open a box to add the metrics. Click on the **+ metric** option to add a metric
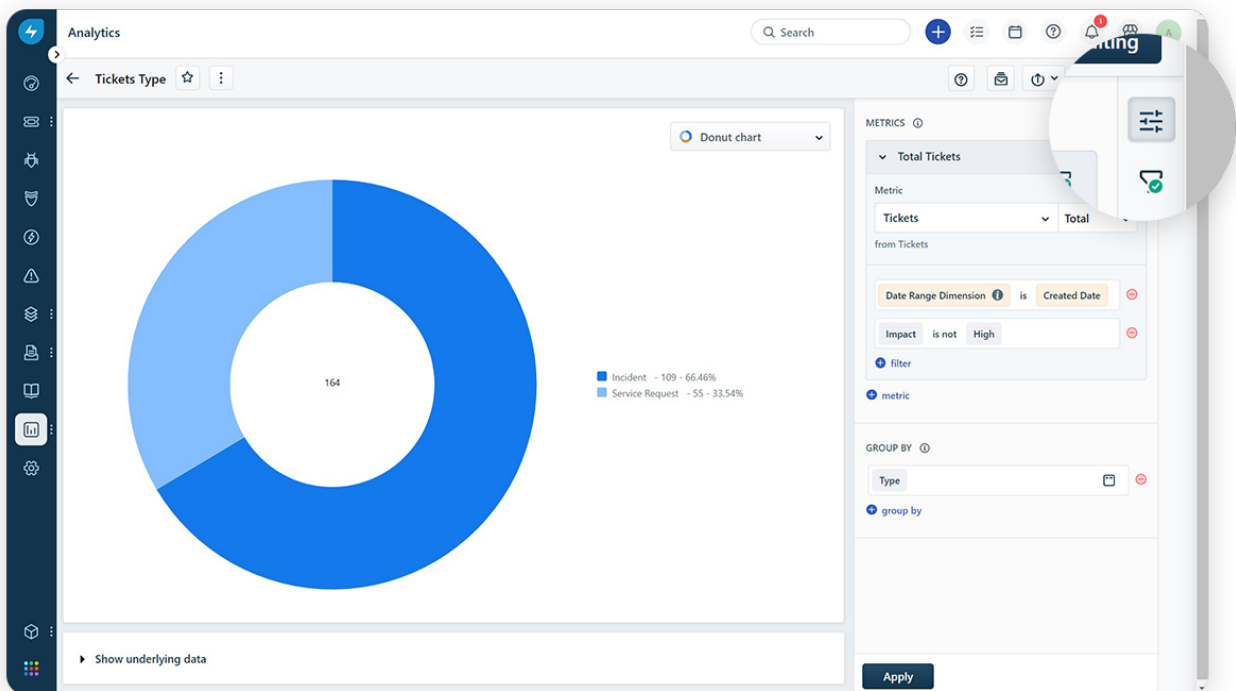
- Select the metric that you want to measure and then select the value (avg, max, min)

- Users can also add a filter from the + **Filter** option to add more granularities. You can use either basic filters or advanced filters.

  - Basic filters are OR & AND

  - Advanced filters support multiple combinations

- Use the **group by** to group data that has the same value into sets
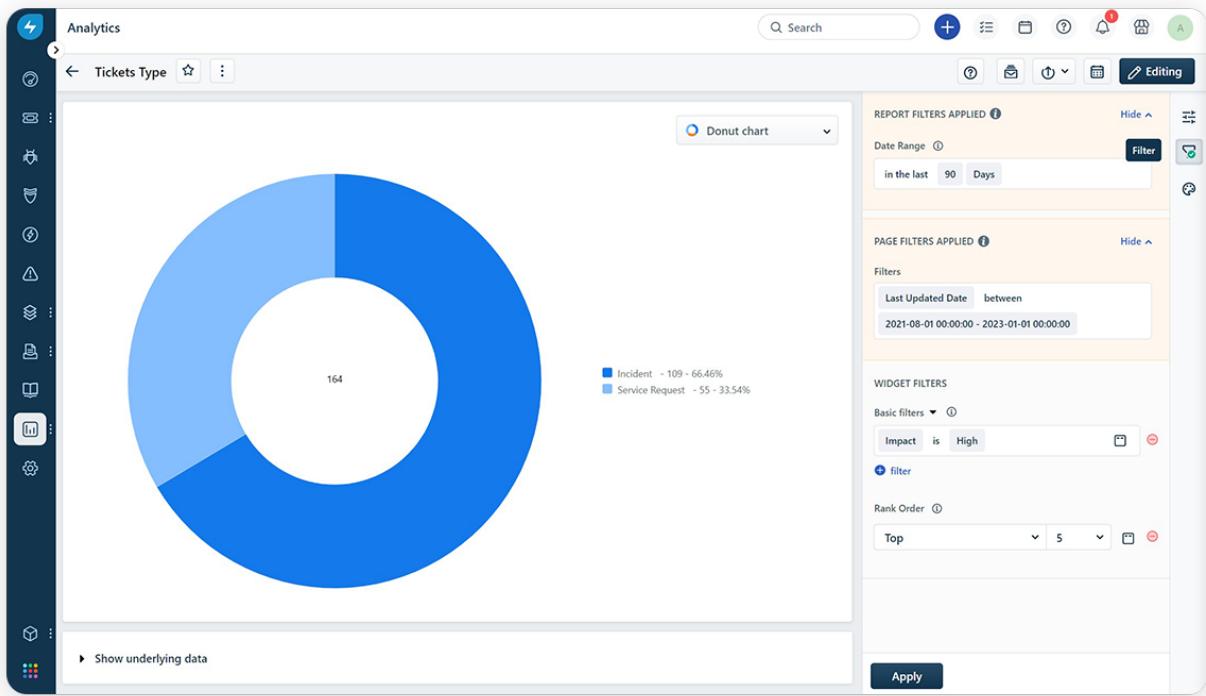
- Once the chart is created you can edit or style the widget using the style icon present in the right most corner of the screen

  - You can add or change the color of the chart, add conditional formatting, and change other widget formats
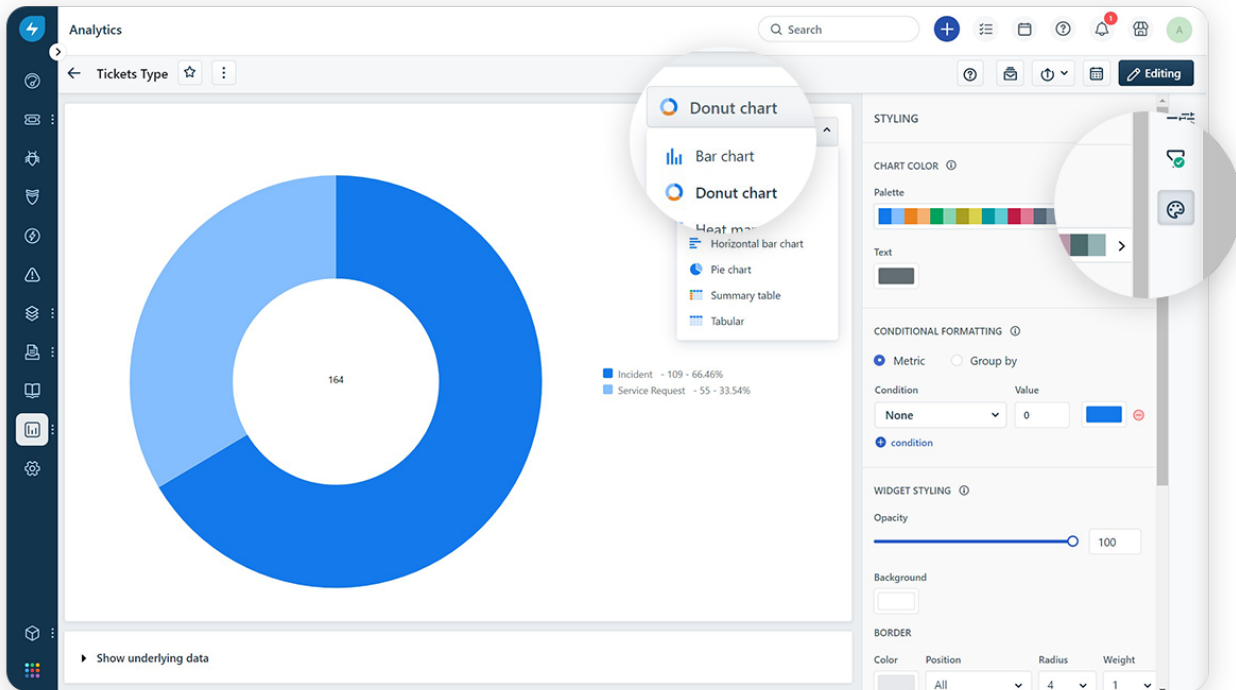
- Users can also change the chart type from the drop-down list of charts available.

- Add text using a text widget

- Change background colors, add borders, and hide widget titles

- Change display mode and canvas size

- Add styles to individual widgets or across the report

Creating New Widgets using 'Templates'

- Click on the Templates option, you will see a screen as below
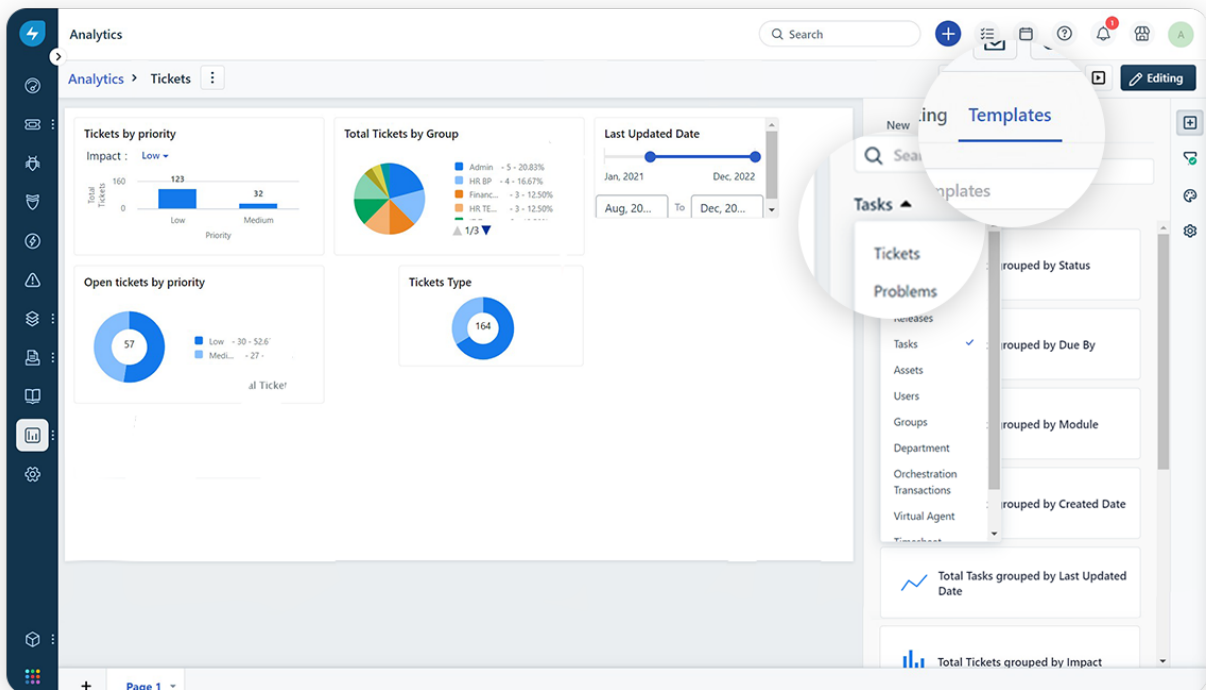
- In this screen, users can either search for a template using the search box or can choose an option from the 'Tasks' tab

- Once a Task is selected, the list of templates under that task is shown below. Click on the required template and drag it to the reports page

Navigating the Page

Search

- The search tab can be used to look for reports or widgets that have already been created and/or shared with the user
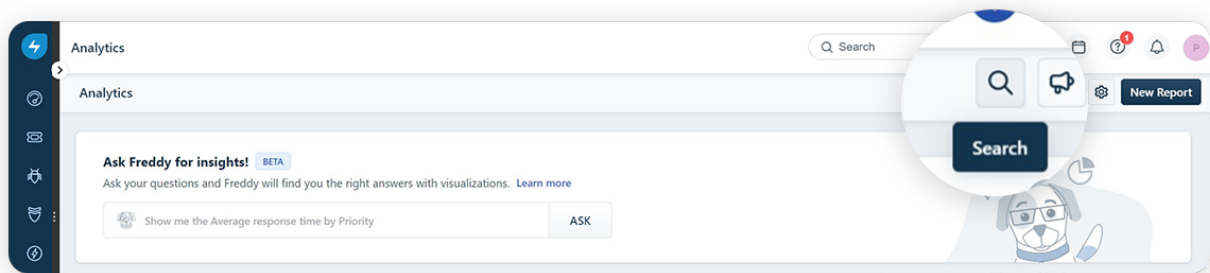

What's New

- It is the announcement section where new feature releases and other analytics updates are published. The top of the page also requests feedback from the users so go ahead and share with us what you like about Smart Analytics and what you would want us to change or add
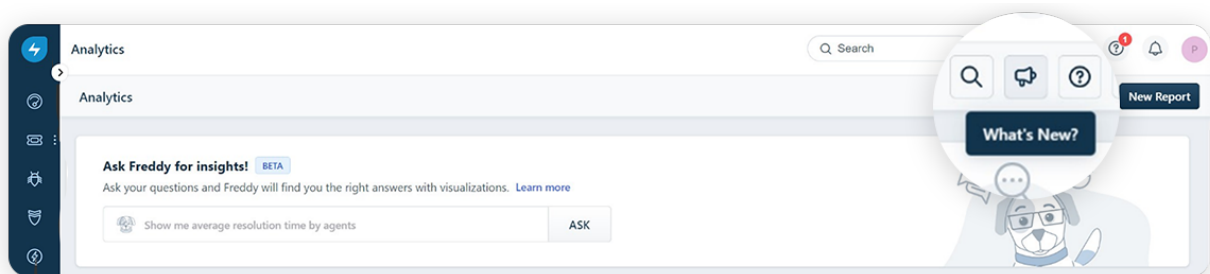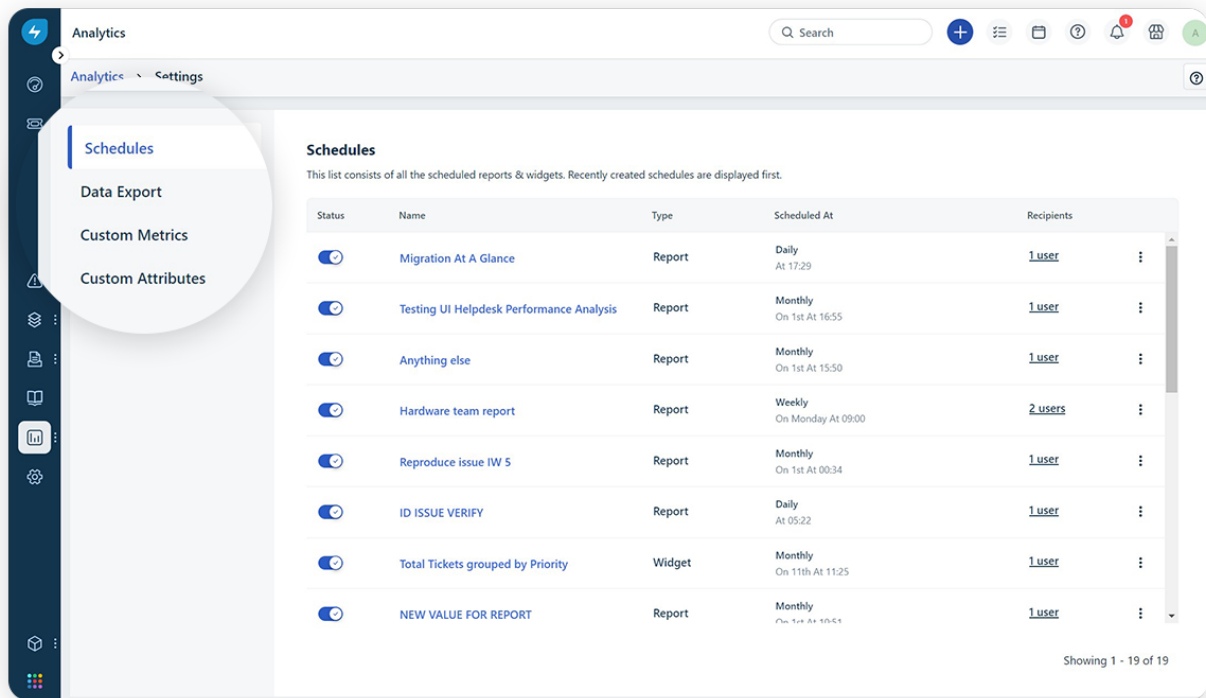
Help

- Help section contains a list of user manuals and guides which the new users can use to learn more about the portal. It also includes a list of frequently asked questions
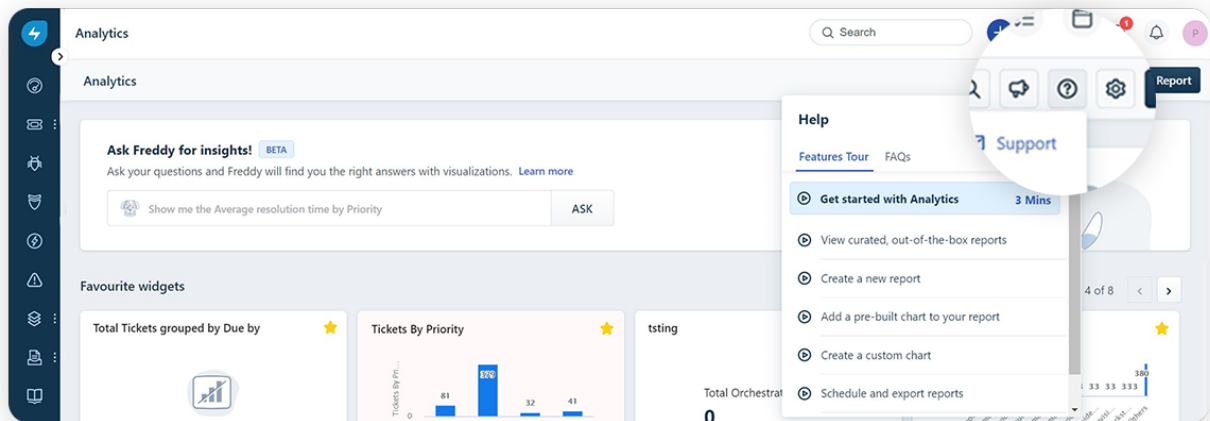

Settings

- Inside settings we have four different features

  - **Schedules –** This contains a list of scheduled reports and widgets. Recently created schedules are displayed first. Users can edit or delete the schedules that they have created. Users can create as many schedules as they want

  - **Data Export –** This feature allows users to set up schedules for exporting data. Users can receive regular data dumps through an easily accessible URL. This section can also be used to easily edit or delete a data export

  - **Custom Metrics (beta) –** This feature allows user to create custom metrics as per their need

  - **Custom Attributes (beta) –** Users can create custom attributes suitable to their requirements using this feature

Ask Freddy

- Freddy is your friendly bot created to help you find answers to various analytical questions. Type your question in the box below and ASK Freddy for the answer
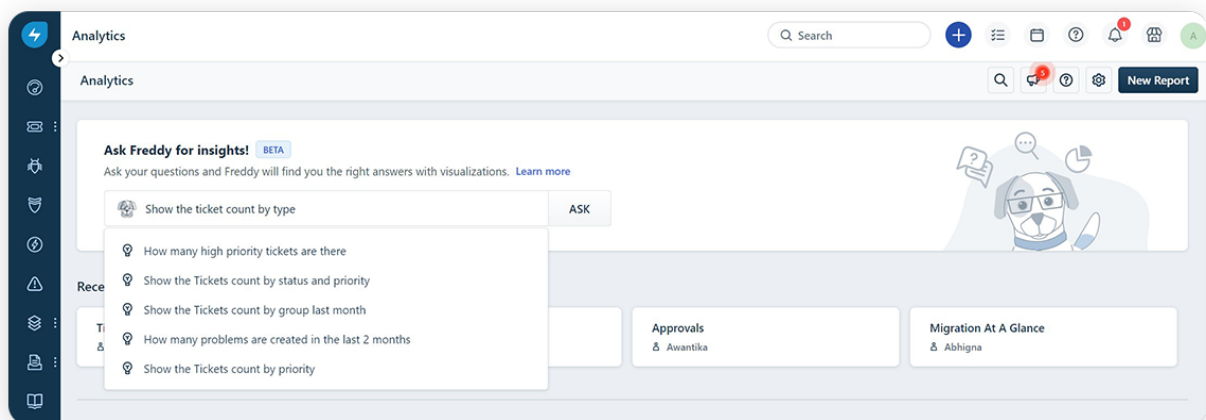
Recent Reports

- Right below the Favorite Widgets section is the Recent Reports section which showcases four recently created reports. Users can easily access the new reports from this section without having to search for them
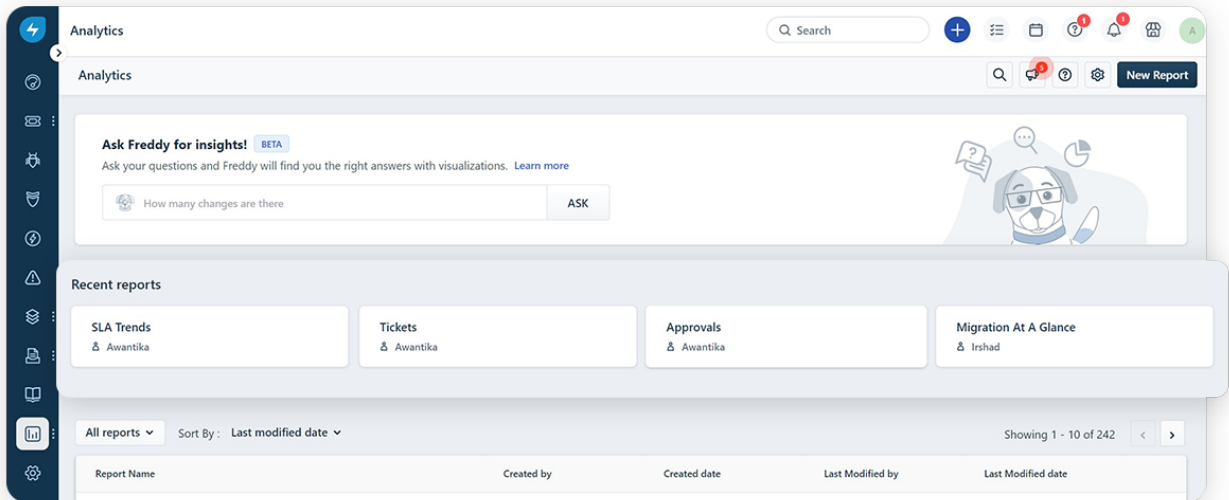
All Reports

- This section has the list of all reports created by or shared with the user. Users can filter the list based on reports created (**Private Reports**), reports shared (**Shared Reports**)or already created reports (**Curated Reports**)
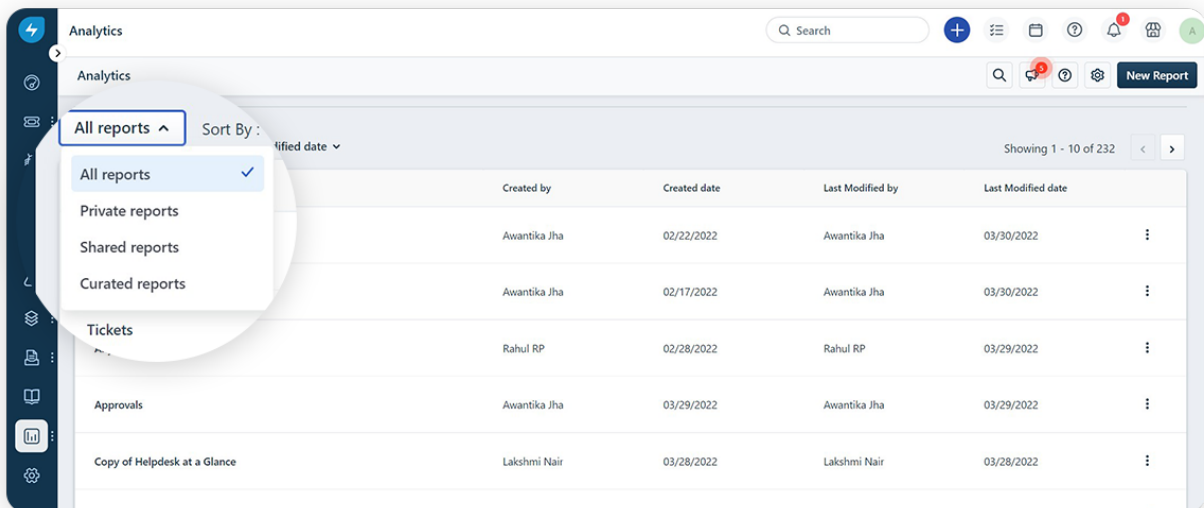
- Users can also choose to sort the list of reports based on name, creator or modifier and date of creation or modification, in the ascending or descending order