Freshservice

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This guide walks the IT/Freshservice administrator through creating a dedicated read-only role, creating a service-account agent to host the API key, generating and verifying the key, and entering the key in the Info-Tech portal. It includes the Freshservice tables/objects that need read-only access so the administrator can complete setup without a separate access-requirements document.

A Before you start

You will need:

- Administrator access to your Freshservice tenant
- An available Freshservice agent license for the integration account
- A service-account email address you control (e.g., `cioanalytics@yourcompany.com`)
- Access to the Info-Tech portal where the API key and Freshservice subdomain will be entered

B Freshservice tables/objects required

The integration requires read-only API access to the following Freshservice tables/objects:

REQUIRED OBJECTS

- `agent`
- `business_hour`
- `conversation`
- `department`
- `group`
- `location`

REQUIRED OBJECTS (CONT.)

- `requester`
- `role`
- `satisfaction_rating`
- `sla_policy`
- `ticket`
- `time_entry`

No create, edit, delete, or write-back permissions are required.

Important — Freshservice's permission model
Freshservice grants API access through the permissions assigned to the integration agent. For this

setup, only enable read/view access to the Freshservice tables/objects listed above. Do not use a personal admin account or a broad admin role.

Steps in this guide

- Step 1: Create a reference-data read role
- Step 2: Create an Agent Role
- Step 3: Create a dedicated agent and assign both roles
- Step 4: Generate the API key
- Step 5: Verify the API key works
- Step 6: Enter the API key in the Info-Tech portal

Step 1: Create a reference-data read role

Admin → Global Settings → Roles → New Role

This role grants the integration account **read-only** access to the reference and administrative objects it needs (agents, roles, groups, departments, locations, surveys, and SLA/business-hours metadata). In Freshservice this is created as an "Admin" role type because those reference objects live under the admin permission set — but it is view-only and grants no ability to change settings or write data. Creating a dedicated role (rather than reusing an existing one) keeps the integration's permissions scoped tightly and makes them easy to audit and revoke.

1. **Open the Admin panel.** Click the Admin gear icon in the left sidebar of Freshservice.
2. **Navigate to Roles.** Under **User Management**, click **Roles**.
3. **Click New Role.** Give the role a clear name — for example, `CIOAnalytics Reference Read-Only` — and a description like *Read-only access to reference data for the Info-Tech Customer Data Store integration.*
4. **Grant the following permissions:**
    - View Agents and Agent Groups
    - View Roles
    - Manage Locations *
    - View Requesters
    - View Department
    - Manage Business Hours, SLA Policies, and OLA Policies *
    - View Surveys
5. **Do not enable create, edit, delete, or write permissions** beyond what is listed above. The integration is read-only and never writes back to Freshservice.
6. **Save the role.**

* **This is a Freshservice UI limitation, not a write-back requirement.** Freshservice does not offer a separate view-only toggle for Locations and for Business Hours / SLA / OLA Policies — it bundles read access under a single "Manage" permission, so enabling "Manage" is the only way to grant the **read** access the integration needs. The integration never creates, edits, or deletes these objects; the API key is used read-only.

Step 2: Create an Agent Role

Admin → Global Settings → Roles → New Role

This role grants the integration account read-only access to tickets and related operational data.

1. **Navigate to Roles.** Under **User Management**, click **Roles** (you should still be in the Admin panel from step 1).
2. **Click New Role.** Give the role a clear name — for example, `CIOAnalytics Agent Read-Only` — and a description like *Agent-level read-only access for the Info-Tech Customer Data Store integration.*
3. **Grant the following permissions:**
   - View Tickets
   - View or Edit Time Entries *
   - View Survey Responses
4. **For Tickets, set the scope to View All Tickets.** This ensures the integration sees every ticket across the tenant, not just tickets in a specific group or department.
5. **Do not enable create, edit, delete, or write permissions** beyond what is listed above.
6. **Save the role.**

* The integration only requires read access. Freshservice combines view and edit permissions for Time Entries into a single option, so enabling it is the only way to grant the read access we need. The integration will not edit Time Entries.

Step 3: Create a dedicated agent and assign both roles

Admin → Global Settings → Agents → New Agent

We will create a new agent account whose sole purpose is to host the API key. Using a dedicated agent (rather than tying the key to a person's account) means the key survives staff turnover and can be deactivated without affecting any human user. Both the Admin Role and Agent Role must be assigned to this agent.

1. **Navigate to Agents.** Under **User Management**, click **Agents**.
2. **Click New Agent.**
3. **Fill in the agent details.** Use a service-account email like `cioanalytics@yourcompany.com`. Suggested display name: `CIOAnalytics`. The mailbox does not need to be monitored — Freshservice only uses it for the initial activation email.
4. **Assign both roles.** Under **Roles**, select both **CIOAnalytics Reference Read-Only** (from step 1) and **CIOAnalytics Agent Read-Only** (from step 2). Do not assign any other roles.
5. **Choose the agent license type.** Use the license type approved by the customer's Freshservice administrator.
6. **Save the agent.** Freshservice will send an activation email to the address you specified.
7. **Activate the account.** Open the activation email, set a password, store it in your password manager, and complete first-time login.

Step 4: Generate the API key

Profile (top-right avatar) → Profile Settings → API Key

Each Freshservice agent has a single API key tied to their account. The API key inherits the agent's role permissions, which is why we created dedicated read-only roles and a dedicated agent in steps 1 through 3.

1. **Sign in as the integration agent.** Use the credentials from step 3.
2. **Open Profile Settings.** Click your avatar in the top-right corner and select **Profile Settings**.
3. **Locate the API Key section.** It appears in the right-hand sidebar of the profile page.
4. **Click View API Key or Copy.** Freshservice may prompt you to re-enter the password or complete a verification step to reveal the key. The API key is a long alphanumeric string.
5. **Record the API key securely.** Copy it directly into your password manager or your organization's secrets vault. Do not paste it into chat, email, or unencrypted documents.

Step 5: Verify the API key works

Run a test API call from your machine, or from Postman / curl.

Before entering the key in the Info-Tech portal, confirm it can read tickets, reference objects, and the Freshservice ticket stats used by the integration.

1. **Test basic ticket read.** Run the following from a terminal, replacing `YOUR_API_KEY` with the key from step 4 and `yourcompany` with your Freshservice subdomain:

   ```
   curl -u YOUR_API_KEY:X -H "Content-Type: application/json" \
     "https://yourcompany.freshservice.com/api/v2/tickets?per_page=1"
   ```

   You should see a JSON response containing one ticket. If you get `401 Unauthorized`, the key is wrong or the role lacks ticket access.

2. **Test the stats include block.** Run:

   ```
   curl -u YOUR_API_KEY:X -H "Content-Type: application/json" \
     "https://yourcompany.freshservice.com/api/v2/tickets?include=stats&per_page=1"
   ```

   The response should include a `stats` object on the ticket with fields such as `first_responded_at`, `resolved_at`, and `closed_at`. If the `stats` object is missing, flag this with your Info-Tech onboarding contact.

3. **Test reference-table reads.** Confirm each of these endpoints returns data:
   - `/api/v2/agents`
   - `/api/v2/departments`
   - `/api/v2/locations`
   - `/api/v2/groups`
   - `/api/v2/sla_policies`
   - `/api/v2/roles`
   - `/api/v2/tickets/{ticket_id}/conversations` *(replace `{ticket_id}` with a ticket ID from the ticket-read*

test above)

- `/api/v2/tickets/{ticket_id}/time_entries` *(returns the worklog / time-tracking entries for that ticket — used for technician work-effort and cost-per-ticket reporting)*
- `/api/v2/surveys/satisfaction_ratings` *(returns CSAT / satisfaction survey responses; the exact path can vary by tenant — if it 404s, confirm the satisfaction survey feature is enabled and flag it with your Info-Tech onboarding contact)*

If any return `403 Forbidden`, the service account is missing the required view permission for that Freshservice object. Add the minimum read-only permission required, then test again.

Step 6: Enter the API key in the Info-Tech portal

Info-Tech portal

> The API key gives bearer access to your Freshservice data. Treat it like a password. **DO NOT SEND THIS TO INFO-TECH.** See the **Submit to Info-Tech Portal** article for the portal submission steps.

1. Go to https://us.app.cioanalytics.ai/
2. Open the **Connections** page.
3. On the **IT Service Management (ITSM)** row, click **Connect Tool**.
4. In the **Connect to ITSM Tool** dialog, select **Freshservice** from the dropdown.
5. Click **Continue**.
6. Follow the instructions in the **Setup Guide** panel on the right to fill in the fields on the left.
7. When every field is complete, click **Add Connection.**
8. Wait for the connection test to finish.

After the connection test succeeds, CIO Analytics takes over the rest of the process automatically.

1. You are returned to the **Connections** page once the connection is saved.
2. Your Freshservice data syncs automatically for the first time. Depending on how much history is being pulled, the first sync can take anywhere from a few hours to a few days.
3. Once that first sync completes, an Info-Tech analyst will reach out to you to continue your onboarding. No further action is needed from you in the meantime.

NOTES ON THIS DOCUMENT

- Freshservice navigation can vary by tenant. If a menu item is not in the exact location shown, use the closest matching Admin, Roles, Agents, or Profile Settings page.
- Questions about anything in this guide can be directed to your Info-Tech onboarding contact.