knowledge15®

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Lab Guide

Performance Analytics 201:

KPIs Scorecards and Dashboards

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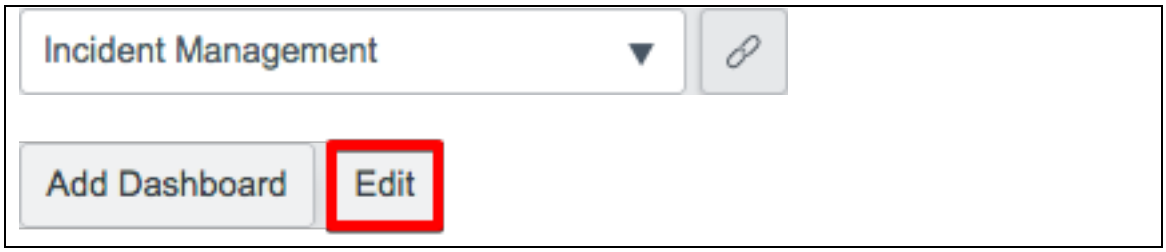
Lab Goal

Lab 1.1
Visualization

This lab explains how to create a process breakdown dashboard and process widget for Incident management.

Create a New Dashboard Tab

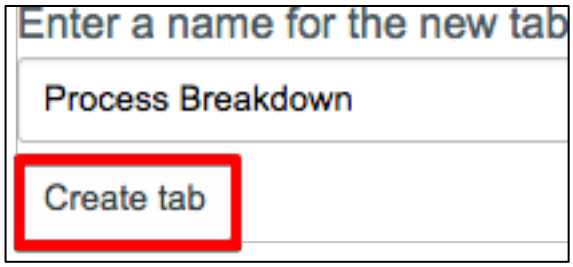
1. Navigate to **Performance Analytics > Dashboard**.
2. Confirm the **Incident Management** dashboard is currently selected and click **Edit.**



3. Click the + tab to add a new Dashboard tab.



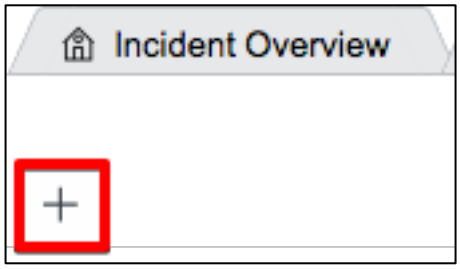
4. Name the new tab **Process Breakdown.**
5. Click **Create Tab**.



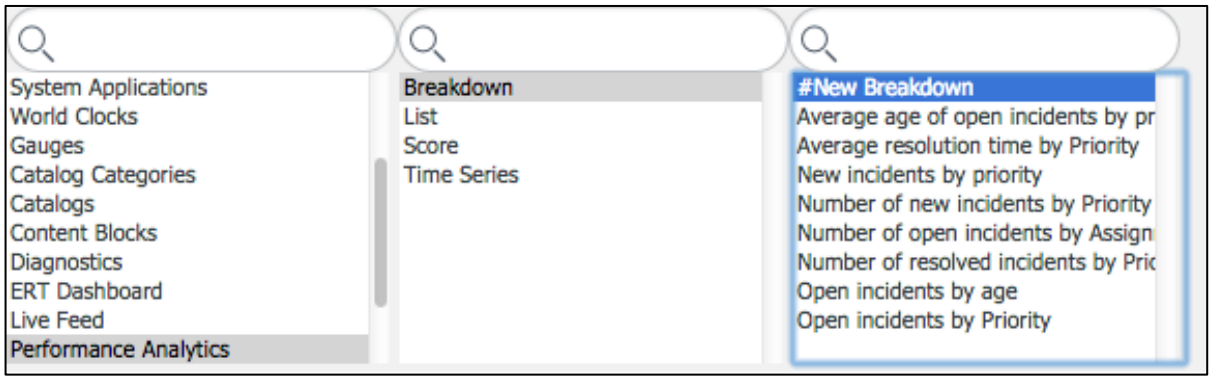
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Create a New Breakdown Widget

1. Click the  button (Add content)



2. From the overlay, select **Performance Analytics** (first column), **Breakdown** (second column) and **#New Breakdown** (third column).

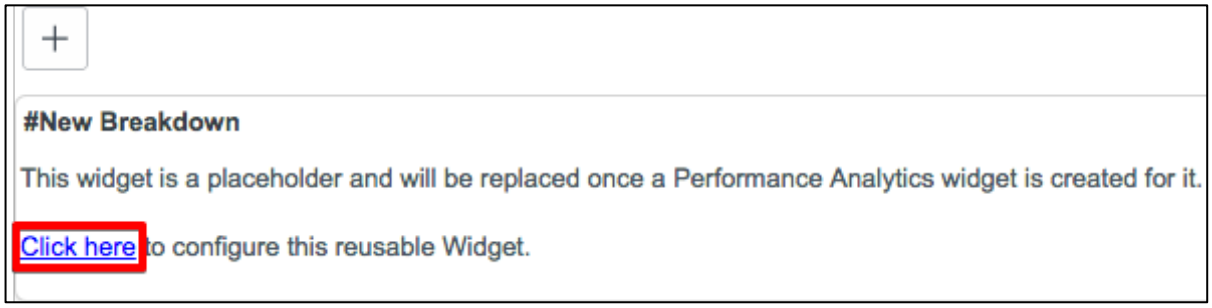


3. Add the **#New Breakdown** widget to the top dropzone, by clicking **Add here.** Close the overlay.



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4. Click the **Click here** link in the **#New breakdown** widget.



5. Fill in the following information in the **Widget** form:

   Name: **Incident State Trend**
   Type: **Time Series**
   Visualization: **Line Chart**
   Indicator: **Number of open incidents**
   Breakdown: **State**
   Element: **New**
   Period (under Date Settings form section): **7d**

6. Click **Submit.**

Add Additional Indicators to the Time Series

1. Hover over the new **Incident State Trend** widget and click the icon.



2. Scroll down to the **Additional Indicators** related list and click **New.**



3. Fill in the following information on the **Additional Indicator** form.

   Indicator: **Number of open incidents.**
   Breakdown: **State.**
   Element**: Active.**

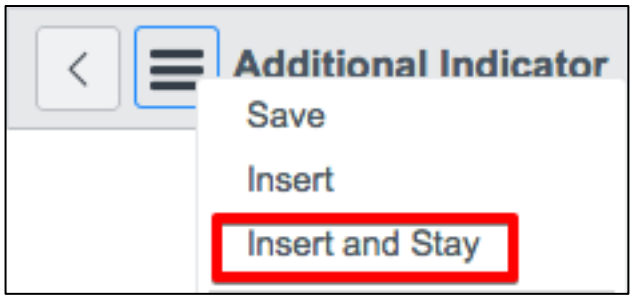
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4. Right-click the form **header** and select **Save.**



5. Change the Element field to be **Awaiting Problem.**

6. Right-click the form header and click on **Insert and Stay**.



7. Using **Insert and Stay** create Additional Indicators for the remaining elements of the state breakdown (Awaiting User Info, Awaiting Evidence, Resolved, Closed).

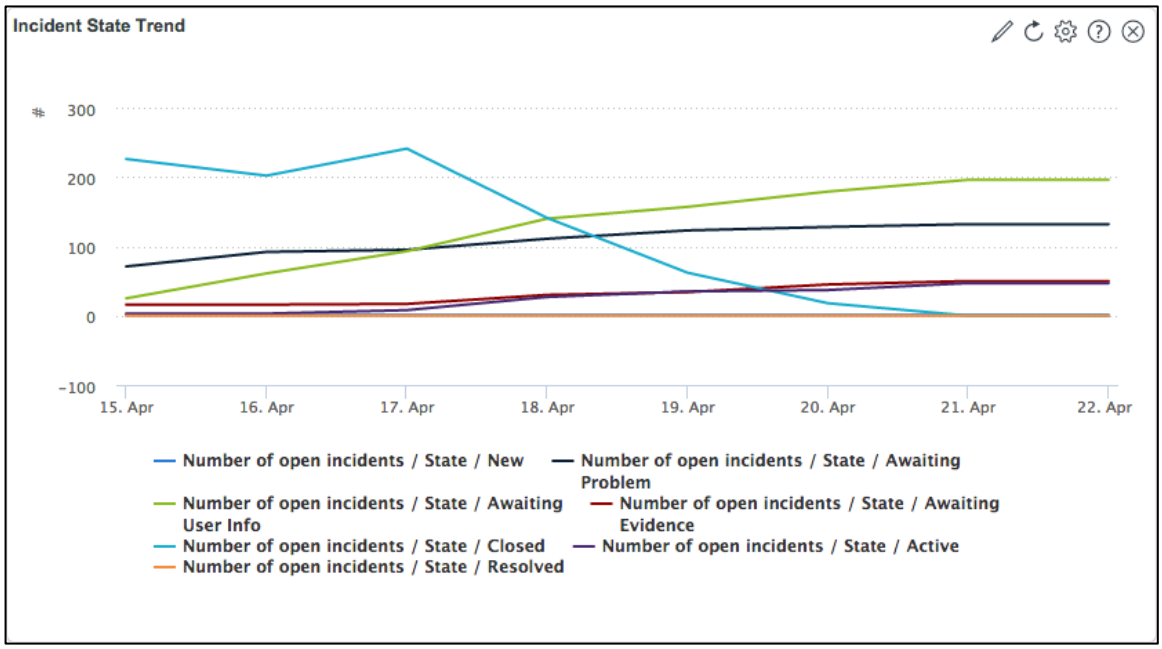
Extra Credit

Open the **Incident State Trend** widget and set individual colors for each **Additional Indicator**.

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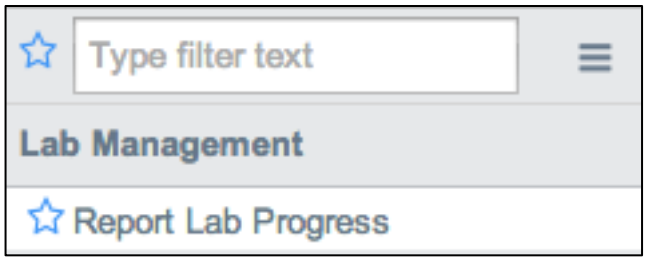
Lab Success Verification

1. The **Incident State Trend** widget should look similar to the example

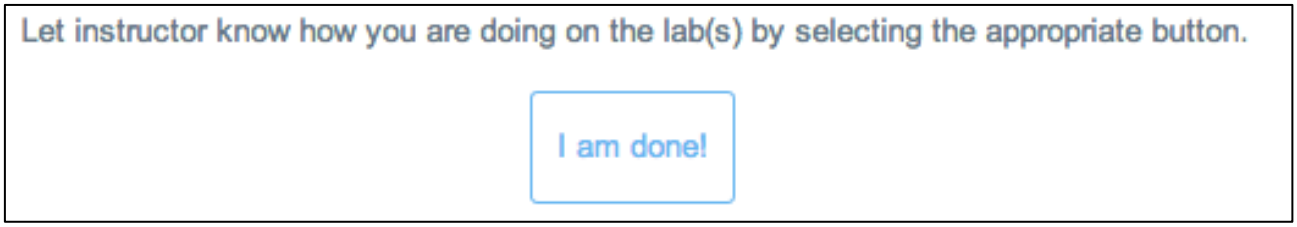


Progress Report

1. Navigate to **Lab Management > Report Lab Progress**.



2. Click **I am done!**



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Lab Goal

This lab explains how Indicator Sources build queries for use by the Data Collector. Extend and out of the box (OOTB) Indicator Source and create a new one.

Lab 2.1 Indicator Sources

Modify and OOTB Indicator Source

1. Navigate to **Performance Analytics > Indicator Sources**.
2. Find the **Incidents.New Indicator Source** in the list and open the record.
3. Add a new filter condition by clicking the button:

4. Set the new condition to be:

   Category – is not one of – Request, Inquiry / Help
   (Hold down the shift key while clicking on an item to select multiple categories)

5. Click the **refresh** button above the conditions builder.

   Note: The records targeted by the condition of the Indicator Source have changed.

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6. Click the **37 records match condition** link to see a list of records targeted by this Indicator Source.

7. Modify the name of the Indicator Source to be **Incidents.New.IT**.

8. Right-click the form header and select **Insert and Stay** from the menu.

   Note: Although this is not really modifying an existing Indicator Source, it is best practice always to use **Insert and Stay** when changing conditions so that **Indicators** which use the original **Indicator Source** are not impacted.

Create a New Indicator Source

1. Navigate to **Performance Analytics > Indicator Sources**.

2. Click **New**.

3. Fill in the following information in the **Indicator Source** form:

   Name: **Knowledge.Published**
   Facts Table**: Knowledge [kb_knowledge]**
   Conditions: **Published – on – Today**



4. **Click the refresh**  **button above** the conditions builder.

   Note: The records targeted by the condition of the Indicator Source have changed.

5. Click the **# records match condition** link to see a list of Knowledge Articles targeted by this Indicator Source.

6. Click **Submit.**

Lab Success Verification

1. New Indicator Sources have been created.

Progress Report

1. Navigate to **Lab Management > Report Lab Progress**.
2. Click **I am done!**

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Lab Goal

This lab explains how Breakdown Sources are used to create multiple dimensions of data.

Lab 2.2 Breakdown Sources

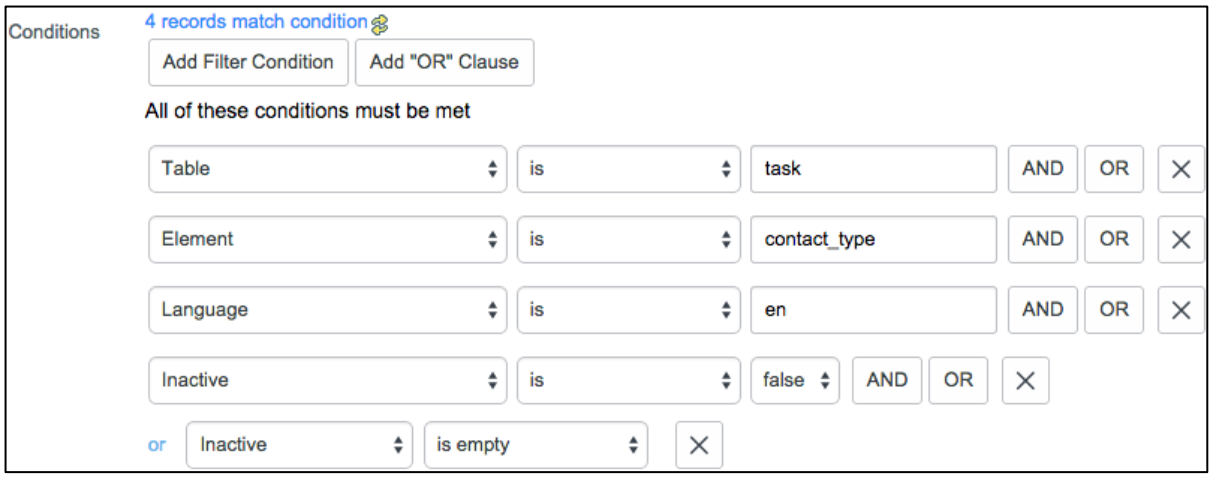
Create a New Breakdown Source

1. Navigate to **Performance Analytics > Breakdown Sources**.
2. Open the **Incident.State** Breakdown Source.

   Note: Breakdown and Indicator Sources forms share common concepts.
3. Change the following information in the **Breakdown Source** form:

   Name: **Task.Contact.Type**
4. In the conditions builder of the conditions field, modify the conditions as follows:

   Table – is – Task
   Element – is – contact_type
   Language – is – en
   Inactive – is – false
   OR Inactive – is empty



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5. Click the **refresh**  button above the conditions builder.

6. Click the **4 records match condition** link to see a list of Choices that are used as elements for this new Breakdown Source. The choice records should be **Email**, **Phone**, **Self-service**, **Walk-in**.

7. Right-click the form header and select **Insert and Stay** to create the new Breakdown Source.

Extra credit

Create a new Breakdown Source for the **close_code** field.

Lab Success Verification

1. New Breakdown Source **Task.Contact.Type** was created and the elements verified.

Progress Report

1. Navigate to **Lab Management > Report Lab Progress**.

2. Click **I am done!**

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Lab Goal

This lab explains how to create a new **Automated Indicator** using the **Incidents.New.IT** Indicator Source created in Lab 2.1.

Lab 3.1 Automated Indicators

Create a New Automated Indicator

1. Navigate to **Performance Analytics > Automated Indicators**.
2. Click **New**.
3. Fill in the following information in the **Indicator** form:

   Name: **Number of new IT incidents**
   Unit: **#**
   Key: **True**
   Indicator Source: **Incidents.New.IT**

4. Right-click the form header and select **Save.**

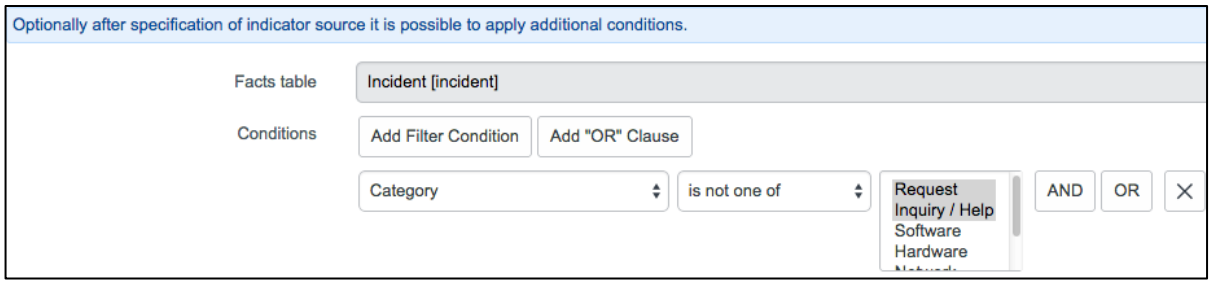
   Note: It is best practice to, where possible, reuse **Indicator Sources** and not create a new source for every **Indicator**. To help facilitate this, **Indicators** have what is called an **Advanced Source**. The **Advanced source** is used in addition to the **Indicator Source** of to define the query of an **Indicator**.

5. Set the Indicator Source field to **Incidents.New**.

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6. Set the conditions of the **Advanced Source** to:

   Category – is not one of – Request, Inquiry / Help
   (Hold down the shift key while clicking on an item to select multiple categories)



7. Right-click the form header and select **Save**.

   Note: The **Advanced source** allows the reuse of generic **Indicator Sources** such as **Incident.New** with additional conditions specific to individual **Indicators** set in the **Advanced Source**. The **Indicator Source Incident.New.IT** is no longer needed. If you were to use this same set of conditions on additional **Indicators** you might consider the need for the **Incident.New.IT** Indicator Source.

8. Right-click the form header and select **Save.**

Extra credit

Create a new Indicator for the **Knowledge.Published** Indicator Source created in Lab 2.1.

Lab Success Verification

1. A new Automated Indicator **Number of new IT incidents** is created with the **Advanced Source** set.

Progress Report

1. Navigate to **Lab Management > Report Lab Progress**.

2. Click **I am done!**

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Lab Goal

This lab explains how to create a new Formula Indicator for the **Number of non IT incidents** using the new **Number of new IT incidents** Indicator created in Lab 3.1.

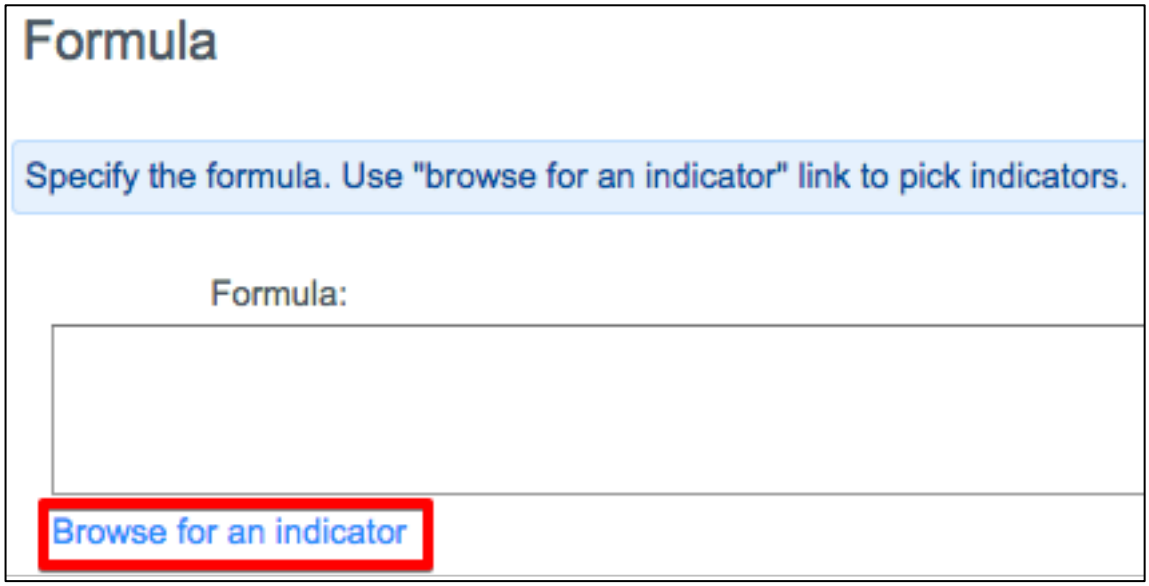
Lab 3.2 Formula Indicators

Create a New Formula Indicator

1. Navigate to **Performance Analytics > Formula Indicators**.
2. Click **New**.
3. Fill in the following information in the **Indicator** form:

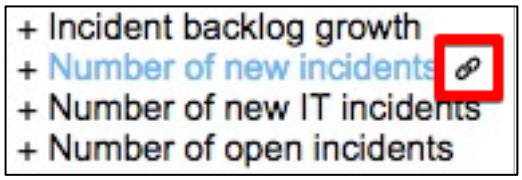
   Name: **Number of non IT incidents**
   Unit: **#**

4. **Click the Browse for an indicator** link below the formula box to open the **Indicator Picker**.

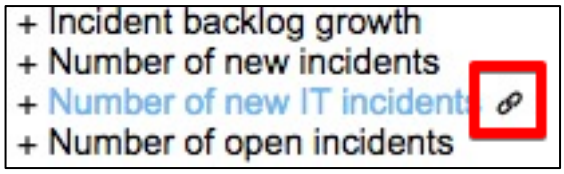


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5. Using the **Indicator Picker,** click the chain icon 🔗 next to the **Number of new incidents** Indicator **to link the Indic**ator in the formula.



6. Again, open the **Indicator Picker and** click the chain icon next to the **Number of new IT incidents** Indicator to link the Indicator to the formula.



Note: Because **Number of new IT incidents** is a subset of the **Number of new incidents** indicator and the units are the same, creating a formula using these two Indicators is straightforward. As you create more complex formulas, think about what is being calculated and what the resulting unit may be.

7. Between the Indicator names in the formula insert the **–** operator.

8. The formula should now read: **[[Number of new incidents]] - [[Number of new IT incidents]]**

9. Click **Submit.**

Extra credit

Create Formula Indicators to calculate the **% of new non IT Incidents** and **% of new IT Incidents**.

Lab Success Verification

1. Formula Indicator created subtracting the **Number of new IT incidents** Indicator from the **Number of new Incidents** Indicator.

Progress Report

1. Navigate to **Lab Management > Report Lab Progress**.
2. Click **I am done!**

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Lab Goal

This lab explains how to create a new Breakdown for the **Task.Contact.Type** Breakdown Source created in Lab 2.1.

Lab 4.1 Automated Breakdowns

Create a New Automated Breakdown

1. Navigate to **Performance Analytics > Breakdowns**.
2. Click **New**.

Prior to Fuji Patch 2

1. Fill in the following information in the **Breakdown** form:

   Name: **Contact Type**
   Breakdown source: **Task.Contact.Type**
   Facts Table: **Incident**
   Field: **Contact Type**

2. **Right-click** the form header and select **Save.**

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From Fuji Patch 2

Fuji Patch 2 introduced Breakdown Mappings. In previous versions, a new Breakdown record was required for each field and facts table mapped to a breakdown source. Now with the functionality of Breakdown Mappings, one Breakdown record can be mapped to many fields on different facts tables.

Breakdown Mappings complement the inheritance structure of table extensions. Fields inherited by child tables generally share the same source as the parent. This is the case for the Contact type field. Using Breakdown Mappings we can map the Contact Type Breakdown to any table inheriting this field.

1. Fill in the following information in the **Breakdown** form:

   Name: **Contact Type**
   Breakdown source: **Task.Contact.Type**

2. **Right-click** the form header and select **Save.**

3. In the **Breakdown Mappings** related list, click **New.**



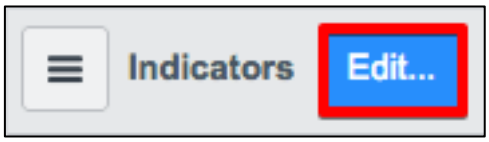
4. Fill in the following information in the **Breakdown Mapping** form:

   Facts Table: **Incident**
   Field: **Contact Type**

5. Click **Submit.**

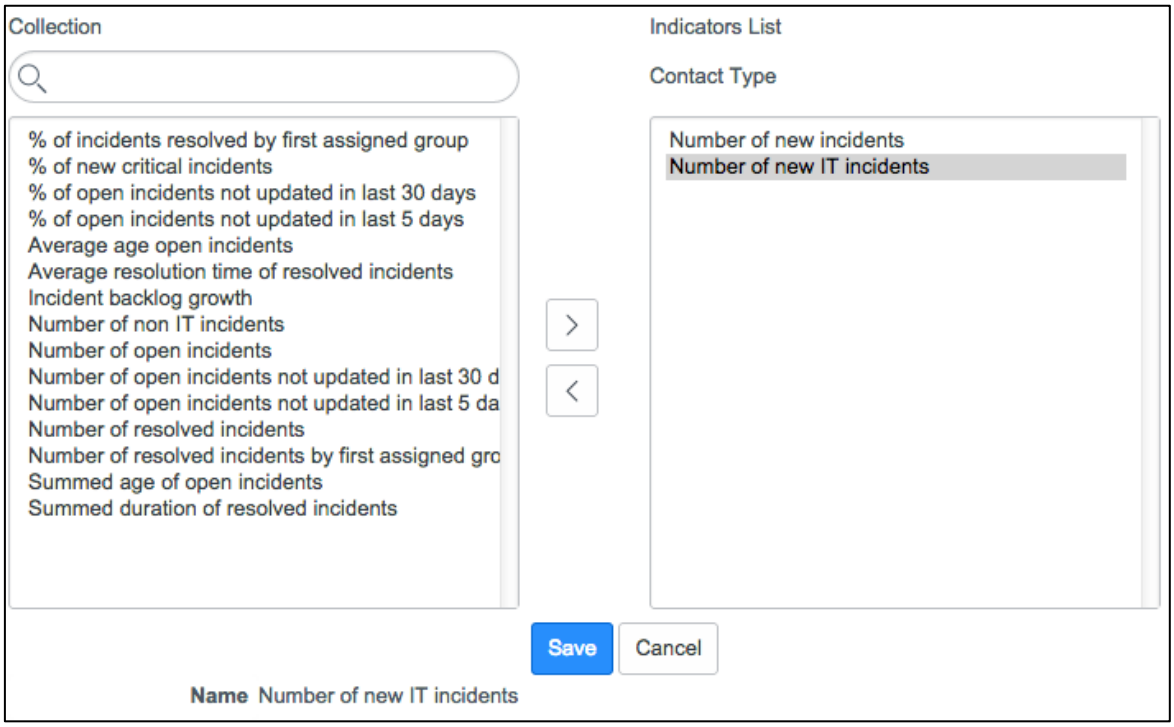
Relate Indicators to this new Breakdown

1. On the **Indicators** related list, click **Edit.**



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2. Add the **Number of new incidents** and **Number of new IT Incidents** Indicators to the **Indicators List** (right side of the slush bucket).



3. Click **Save.**

Extra credit

Create Breakdown Mappings for the Problem, Change and request facts tables.

Relate other appropriate **Breakdowns** to the **Number of new IT incidents** Indicator.

Lab Success Verification

1. A new breakdown was created for the **Task.Contact.Type** Breakdown Source and the Number of new incidents and Number of new IT incidents indicators were related to this breakdown.

Progress Report

1. Navigate to **Lab Management > Report Lab Progress**.

2. Click **I am done!**

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Lab Goal

This lab explains how to create **Breakdowns** based on **Bucket Groups**. Create a **Bucket Group**, **Breakdown Source**, **Script** and a **Breakdown** to group the Close code of Incident records into **Solved, Not solved** and **Resolved by caller**.

Lab 4.2 Bucket Breakdowns

Create a new Bucket Group

1. Navigate to **Performance Analytics > Bucket Groups**.
2. Click **New**.
3. Fill in the following information in the **Bucket Group** form:

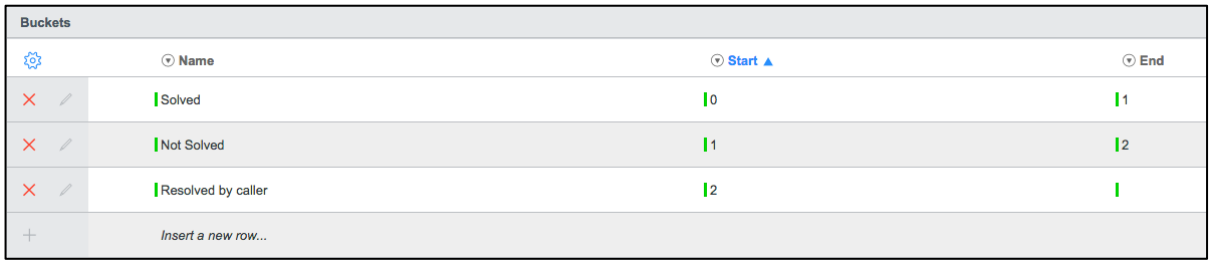
   Name: **Close Code**

4. In the Buckets Embedded List create the following Buckets:

   Name: **Solved**
   Start: **0**
   End: **1**

   Name: **Not solved**
   Start: **1**
   End: **2**

   Name**: Resolved by caller**
   Start**: 2**



5. **Click Submit**.

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Create a New Breakdown Source

1. Navigate to **Performance Analytics > Breakdown Sources**.
2. Click **New**.
3. Fill in the following information in the **Breakdown Source** form:

   Name: **Incident.Close.Code**
   Facts table: **Bucket [pa_buckets]**
   Field**: Sys ID**
4. Add a condition to the conditions builder:

   Bucket Group – is – Close Code
5. Click the **refresh**  button above the conditions builder.
6. Click the **3 records match condition** link to see the list of Buckets used as elements for this new Breakdown Source. The choice records should be **Solved**, **Not Solved**, **Resolved by caller.**
7. Click **Submit.**

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Create a New script

1. Navigate to **Performance Analytics > Scripts**.
2. Click **New**.
3. Fill in the following information in the **Script** form:

   Name: **Incident.Close.Code**
   Facts table: **Incident [incident]**
   Fields: **Close code**
   Script:

```
function getBucketRange(close_code){
	var bucket = 3;
	switch (close_code.toString()) {
		case 'Solved (Work Around)':
		case 'Solved (Permanently)':
		case 'Solved Remotely (Work Around)':
		case 'Solved Remotely (Permanently)':
			bucket = 0;
			break;
		case 'Not Solved (Not Reproducible)':
		case 'Not Solved (Too Costly)':
			bucket = 1;
			break;
		case 'Closed/Resolved by Caller':
			bucket = 2;
			break;
	}
	return bucket;
}
getBucketRange(current.close_code);
```

4. Click **Submit.**

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Create a New Breakdown

1. Navigate to **Performance Analytics > Breakdowns**.
2. Click **New**.

Prior to Fuji Patch 2

1. Fill in the following information in the **Breakdown** form:

   Name: **Close Code**
   Breakdown Source: **Incident.Close.Code**
   Facts table: **Incident [incident]**
   Scripted: **True**
   Script: **Incident.Close.Code**

2. Click **Submit.**

From Fuji Patch 2

1. Fill in the following information in the **Breakdown** form:

   Name: **Close Code**
   Breakdown Source: **Incident.Close.Code**

2. **Right-click** the form header and select **Save.**
3. In the **Breakdown Mappings** related list, click **New.**



4. Fill in the following information in the **Breakdown Mapping** form:

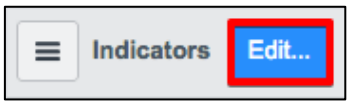
   Facts table: **Incident [incident]**
   Scripted: **True**
   Script: **Incident.Close.Code**

5. Click **Submit.**

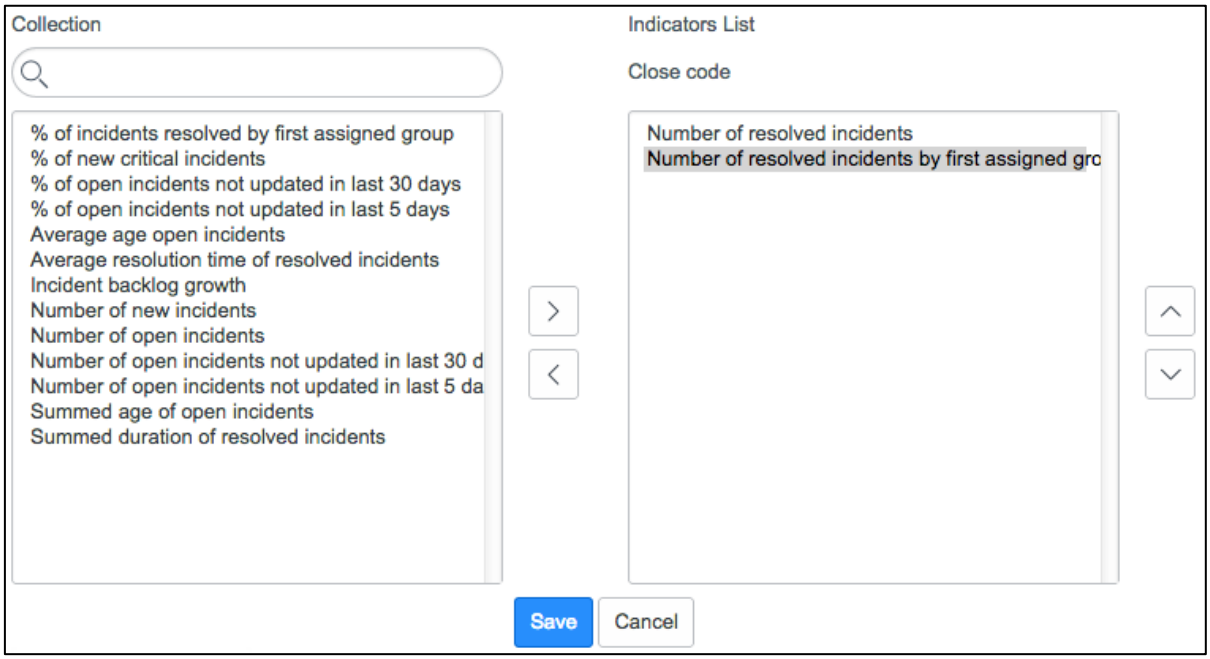
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Relate Indicators to this new Breakdown

1. On the **Indicators** related list, click **Edit.**



2. Add the **Number of resolved incidents** and **Number of resolved incidents by first assignment group** Indicators to the **Indicators List** (right side of the slush bucket).



3. Click **Save.**

Lab Success Verification

1. A new bucket breakdown was created with the **Number of resolved incidents** and **Number of resolved incidents by first assignment group** Indicators linked to the new breakdown.

Progress Report

1. Navigate to **Lab Management > Report Lab Progress**.

2. Click **I am done!**

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Lab Goal

This lab explains how to schedule a Performance Analytics data collection.

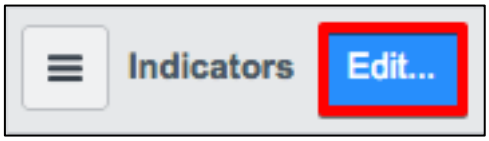
Lab 5.1 Schedule a Data Collection

Create a New Scheduled Data Collection

1. Navigate to **Performance Analytics > Jobs**.
2. Click **New**.
3. Enter the following information in the Scheduled Data Collection form:

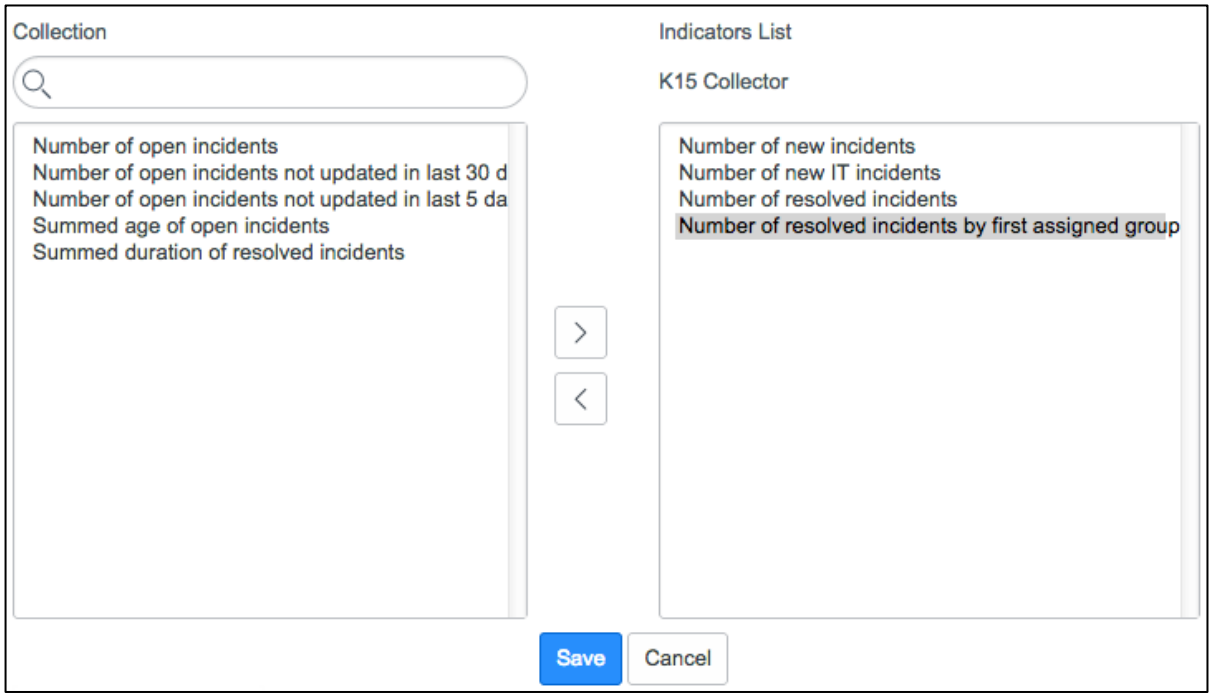
   Name: **K15 Collector**
   Operator: **Fixed**
   Fixed start: **2015-01-01**
   Fixed end**: 2015-04-22**

4. **Save** the form**.**
5. On the **Indicators** related list, click **Edit.**



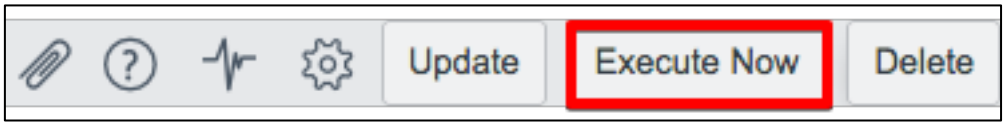
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6. Add the **Number of new incidents**, **Number of new IT Incidents, Number of resolved incidents, Number of resolved incidents by first assignment group** Indicators to the **Indicators List** (right side of the slush bucket).



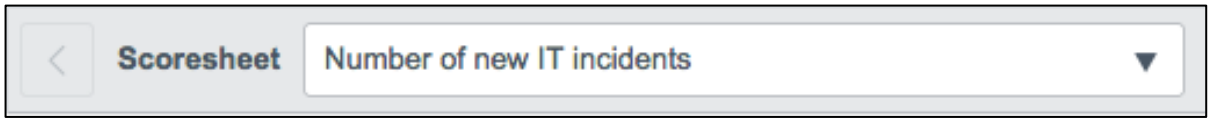
7. Click **Save**.

8. Click **Execute Now**.



9. Navigate to **Performance Analytics > Job Logs.** There will be a new Job Log record in a **collecting** state.

10. Navigate to **Performance Analytics > Scoresheet.** Select Indicator **Number of New IT Incidents** from the dropdown. Scores should now be populating from the first of January.



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11. Select the Indicator **Number of resolved incidents.** Check the Close Code breakdown is also populating with scores.

    Note: Collection time has been significantly improved in the Eureka and Fuji versions of Performance Analytics over the legacy product.

Extra Credit

Check the **Scoresheet** of the other Indicators related to this Collection. Check that the breakdowns created in previous labs also have scores recorded.

Lab Success Verification

1. Scores should now be collected. The Scoresheet of the **Number of New IT Incidents** should now show scores starting from the first of January.

Progress Report

1. Navigate to **Lab Management> Report Lab Progress**.

2. Click **I am done!**

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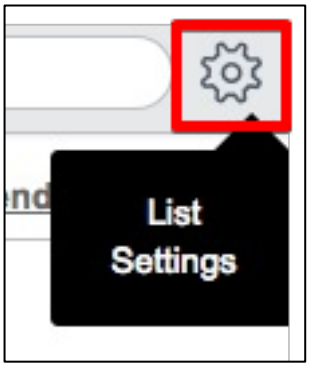
Lab Goal

This lab explains how to navigate around the Detailed Scorecard page. It also explains how to show trend, breakdown, and record information for a KPI. During this session, you add statistics overlays and change the date ranges to view previous periods.

Lab 5.2
The Scorecard

Open the Detailed Scorecard

1. Navigate to **Performance Analytics > Scorecards**.
2. Open the **List Settings** menu.



3. Toggle the **Key** filter.

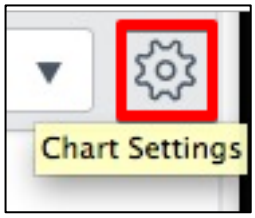


4. Click the **Number of New IT Incidents** Indicator.

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Show the Trend Line

1. Open on the **Chart Settings** menu.



2. Toggle the **trend line** option.

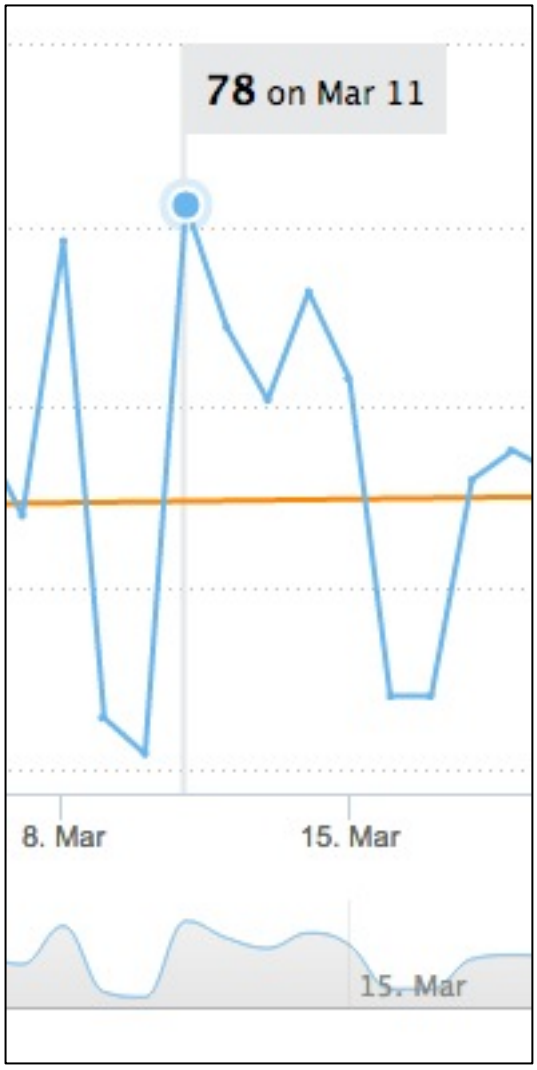


Note: Is the calculated direction of the KPI trending up, down or is it balanced?

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Choose a Date

1. Click on a data point in the main chart.



2. Notice the change in score from the previous date.

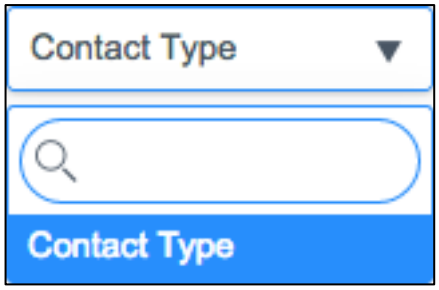


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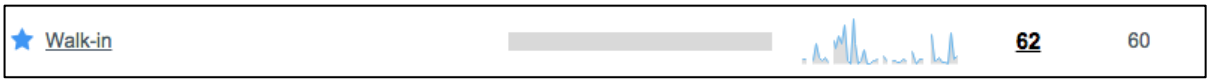
3. Click the **Breakdowns** tab.

   Note: The **Breakdowns** tab will respond to the selected date. The scores shown are the **Breakdown** scores for the selected date.

4. Select the Contact Type Breakdown.



Click the **Walk-in** breakdown element.



Note: The change of the breadcrumbs. The detailed scorecard is now showing the scores for the **Walk-in** element of the Priority Breakdown.



The Records Tab

1. Click the **Records** tab.

   Note: The records shown here are part of the snapshots generated by the **Data Collector**.

   Note: While the records shown in this tab are correct for the selected date, they are live views of the records. The **Data Collector** does NOT store snapshots of the field data. This means that the data may have changed since the collection took place. As a result some of the records may now show a different contact type than the selected element **Walk-in**.

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Change the Date Range

1. Click the **Number of New IT Incidents** in the breadcrumbs.

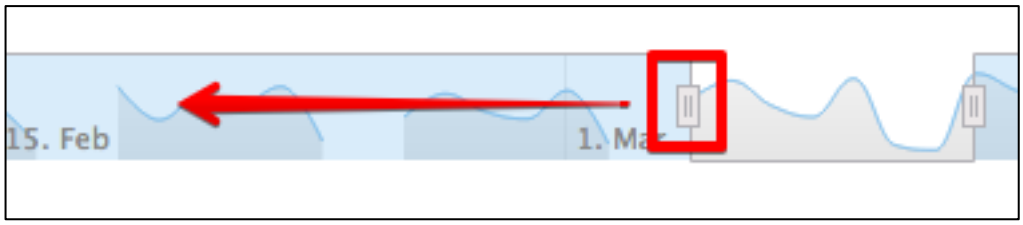


2. Click the **7d** data range.

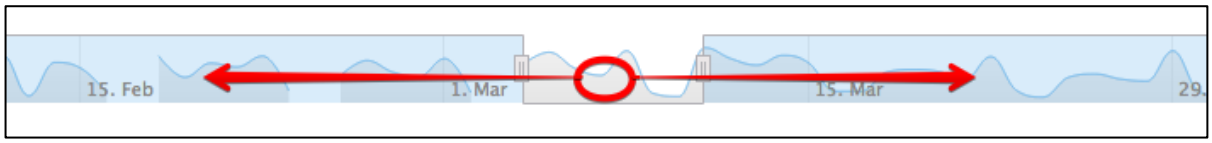


Note: The date ranges will use the selected data as the last date for the range selected. The **7d** range should show the scores for the week leading up to the selected date.

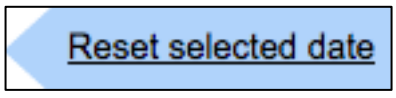
3. Use the **Range Selector** and drag the left end of the data range out.



Note: The **Range Selector** can also be used to pan using the current date range.



4. Click **Reset selected date**.



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Lab Success Verification

1. You should now have a better understanding of how navigate around the Detailed Scorecard to.

Progress Report

1. Navigate to **Lab Management > Report Lab Progress**.

2. Click **I am Done!**

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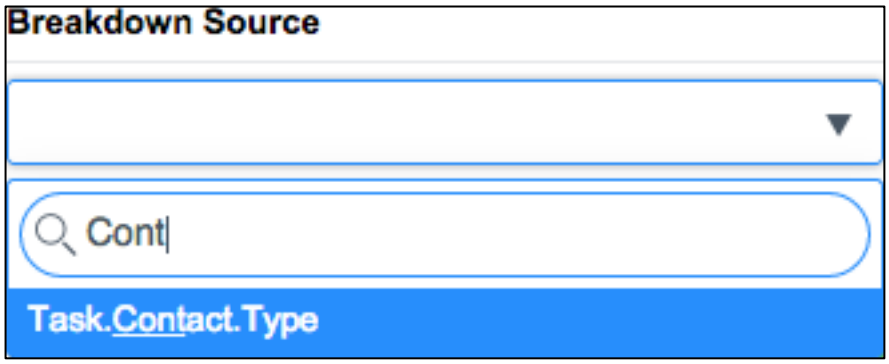
Lab Goal

This lab explains how to show set a target.

Lab 6.1
Targets

Open the Detailed Scorecard

1. Navigate to **Performance Analytics > Scorecards**.
2. Open the **List Settings** menu.
3. Select the **Task.Contact.Type** breakdown from the **Breakdown Source** select box.

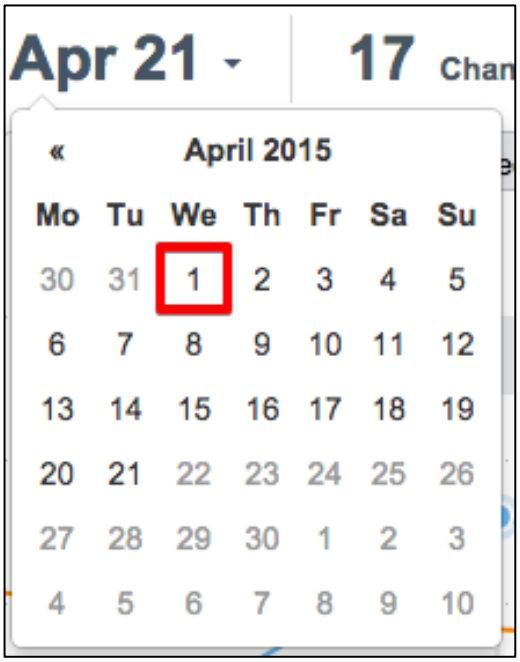


4. Click the **Number of New IT Incidents** Indicator.

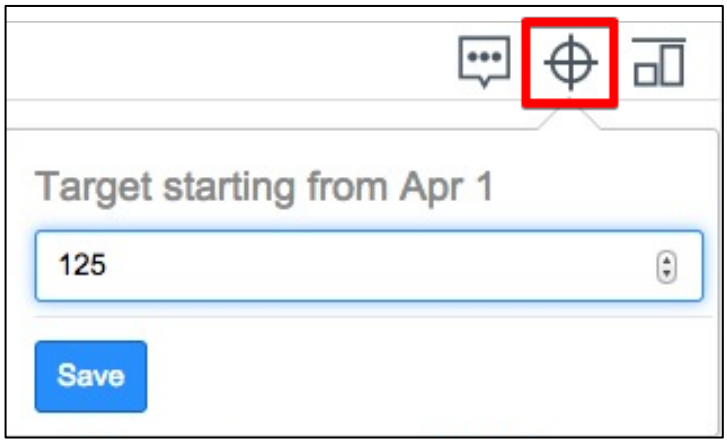
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Add a Target

1. Click the **Date Selector** and choose April the first.



2. Click the **Target** icon and set a new target at this date.



Target starting from Apr 1: **125**

3. Click **Save.**

Note: The **Target** will continue from this date until a new target is set.

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4. Select April the sixth from the **Date Selector**.

   Note: The target now appears alongside the gap and gap % from the current target.



5. Click **Reset selected date**.

Extra Credit

Create **Targets** for the elements of the **Contact Type** breakdown.

Lab Success Verification

1. You should now be able to add Targets to Indicators.

Progress Report

1. Navigate to **Lab Management > Report Lab Progress**.
2. Click **I am done!**

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Lab Goal

Learn how to show set a Threshold for an indicator and setup user notifications when Threshold conditions are met.

Lab 6.2
Thresholds

Open the Detailed Scorecard

1. Navigate to **Performance Analytics > Scorecards**.
2. Open the **List Settings** menu.
3. Toggle the **With a target** filter.



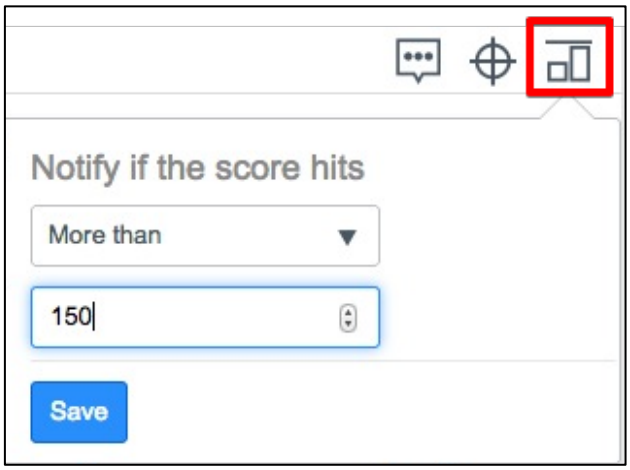
4. Click the **Number of New IT Incidents** Indicator.

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Add a Threshold

1. Click the **Threshold** icon and set a new threshold for the indicator:

   Notify if the score hits: **More than 150**



2. Click **Save**.

3. Navigate **to Performance Analytics > Thresholds.**

4. Open the newly created threshold record for the **Number of New IT Incidents** Indicator.
   Note: The **Threshold** will create a score note on Data Collection when the conditions are met.

5. Scroll down to the **Users** related list. Click **Edit**.

6. Add your user account to the **Users List** (right side of the slush bucket).
   Note: By adding users to this related list they are notified by email when threshold conditions are met.

Lab Success Verification

1. You should be able to add thresholds to Indicators and set notifications.

Progress Report

1. Navigate to **Lab Management > Report Lab Progress**.

2. Click **I am done!**

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