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Reporting 201: Creating Killer Dashboards

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Agenda

- Overview
- Lab 1 – Adding Business Services
- Lab 2 – Adding Cost Management
- Lab 3 – Where is the work? Adding maps
- Lab 4 – Creating a metric KPI and adding it to the dashboard
- Lab 5 – Adding control to your homepage
- Wrap up!

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Killer Dashboard Overview

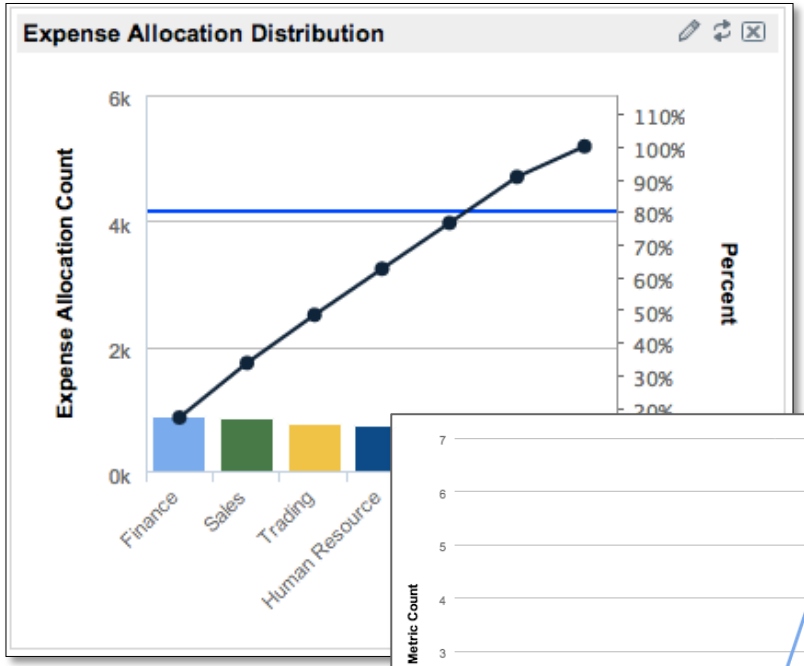
The goal of this lab is to introduce reports and dashboards which would be relevant to your CIO, managers, and executives.

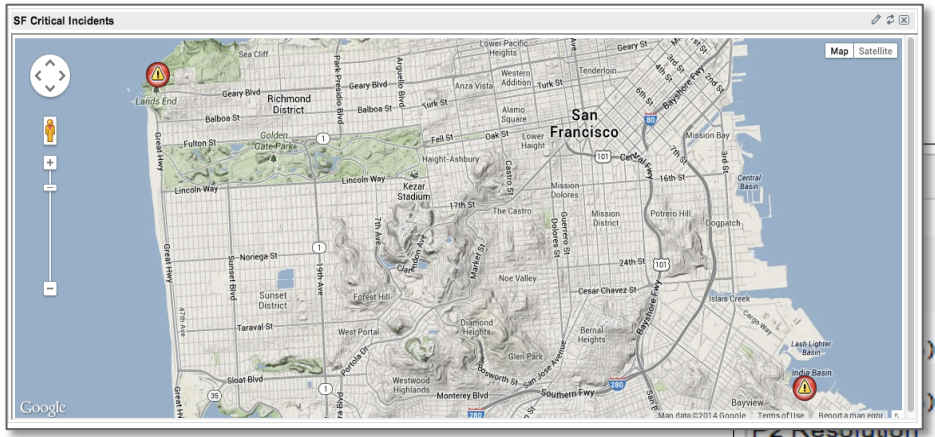
And how to create the publish these to dashboards.

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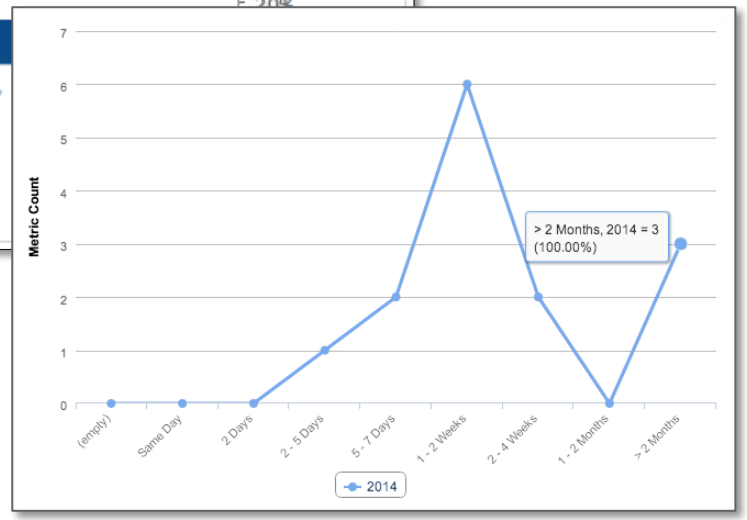
What is your staff interested in?

Money!

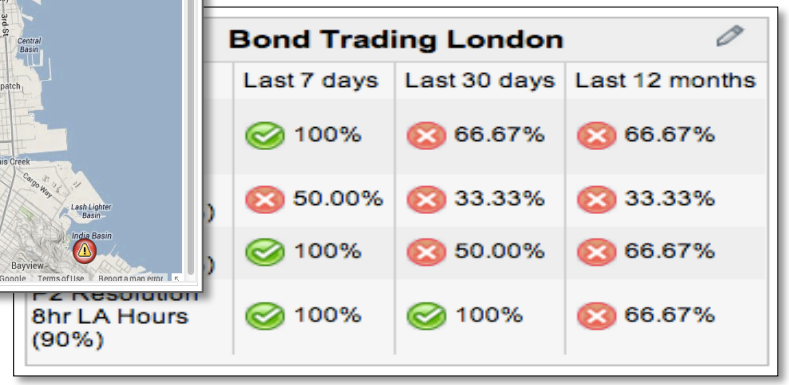




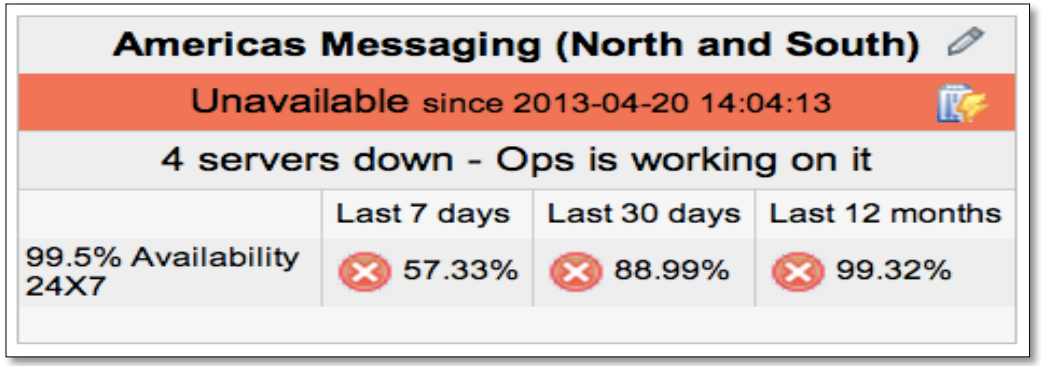
KPI's



Commitments



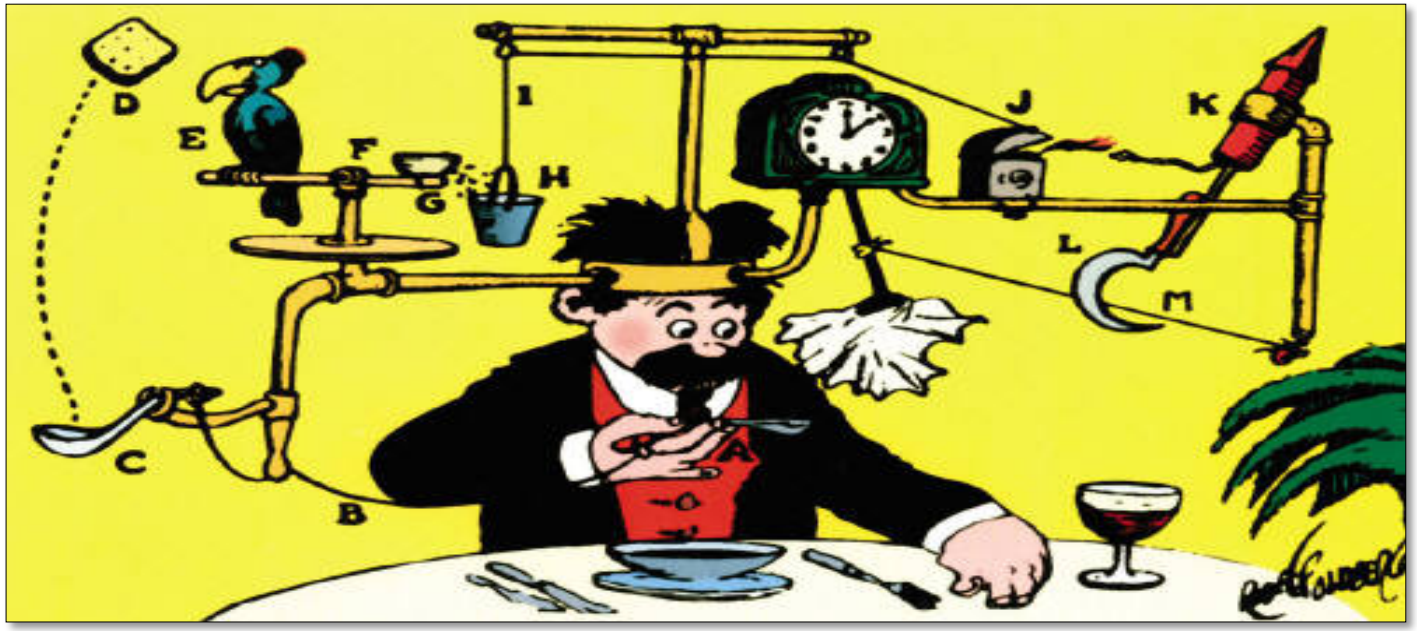
Availability



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How do you achieve this?

- KISS
- Clarity across applications
- Business & Financial impact



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Business Service



Oracle Database Hosting

ORACLE

Current Status: Operational

Service Scope

In Scope	Out of Scope
• Contract Management • Managing Licenses, the server licenses excluded • Proactive and reactive maintenance of servers • Security and Privacy Management	• Application Support • Procurement

Price model: per GB

A partitioned virtual Oracle Database server shared with other clients, but tablespace you utilize is invisible and not impacted by them. The number of tables, indexes, and other objects that can be placed in your tablespace is limited only by disk space.

Service Offerings

Standard Oracle Hosting
Operational

Location:
Manager:
Tech Contact:
Billed Monthly: **$25.00** per GB

Commitments

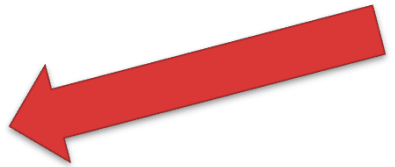
- **10 GB Database**
- **Nightly backup**
- **Unlimited Connections**
- **99.997% Availability** 24 x 7

Critical System Oracle Hosting
Operational

Location:
Manager:
Tech Contact:
Billed Monthly: **$35.00** per GB

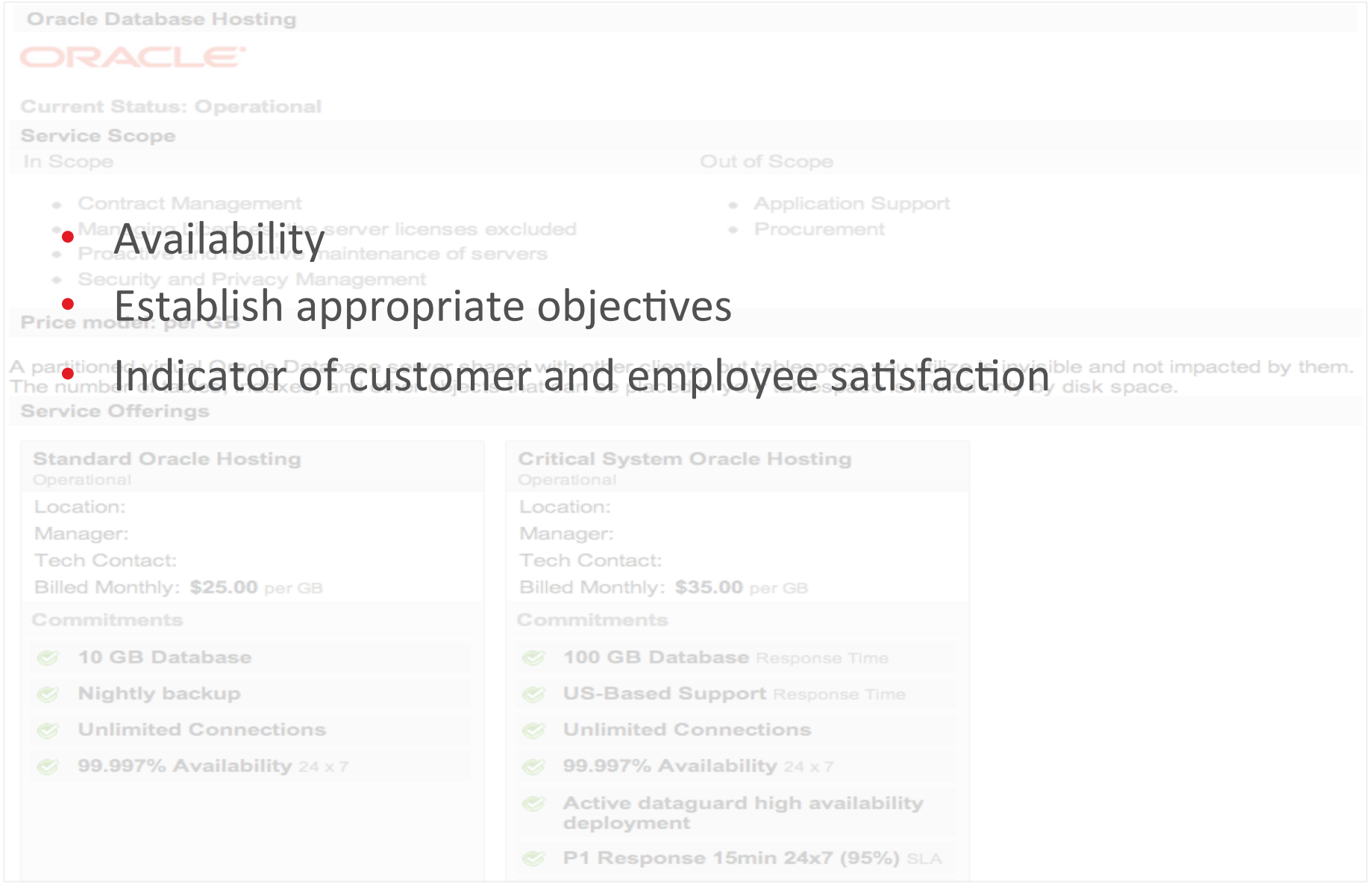
Commitments

- **100 GB Database** Response Time
- **US-Based Support** Response Time
- **Unlimited Connections**
- **99.997% Availability** 24 x 7
- **Active dataguard high availability deployment**
- **P1 Response 15min 24x7 (95%)** SLA



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Business Service



- Availability
- Establish appropriate objectives
- Indicator of customer and employee satisfaction

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Labs



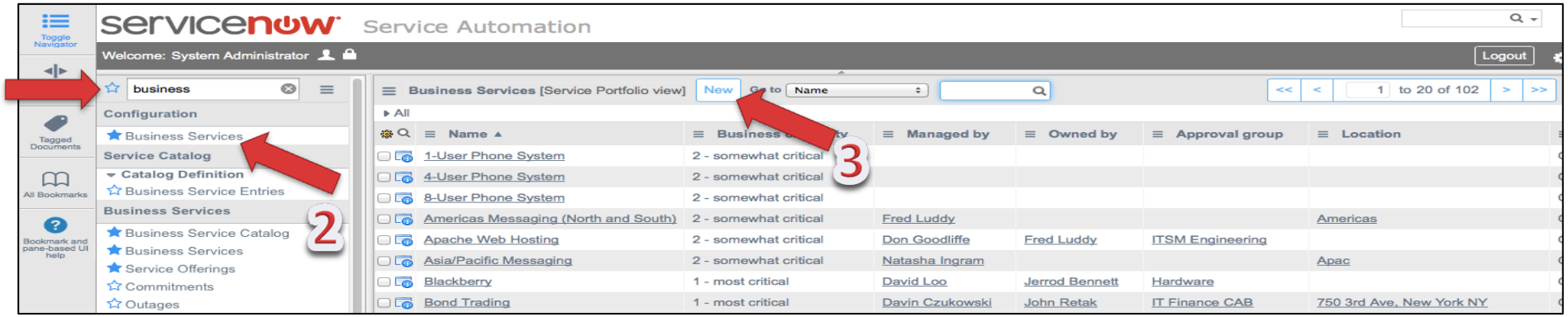
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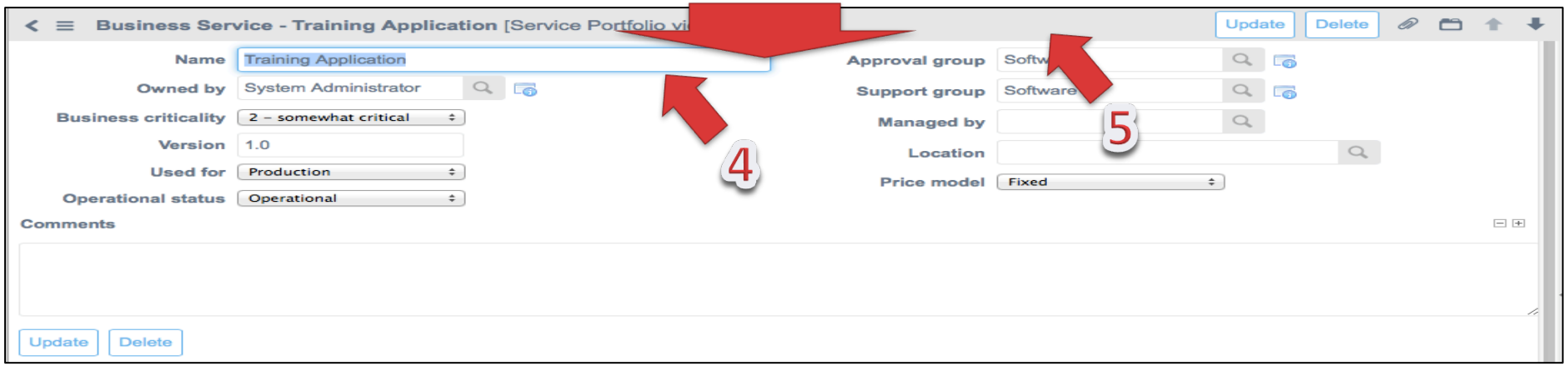
Lab 1

Creating a Business Service

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Lab 1: Create a new Business Service

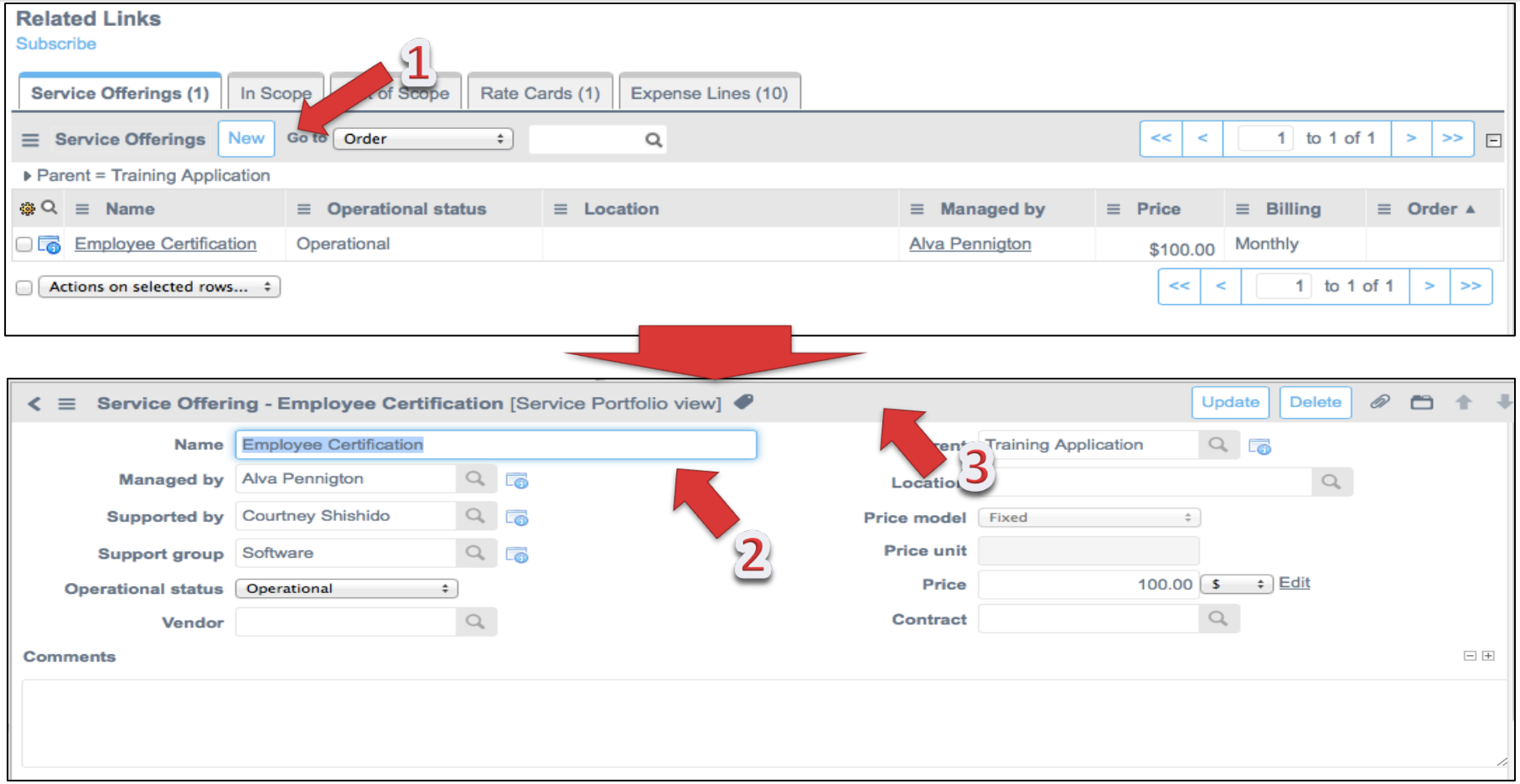




1. Type Business in the type filter box
2. Select Business Services
3. Select the “New” button
4. Create your new service … any text
5. Right click header bar and select “Save”

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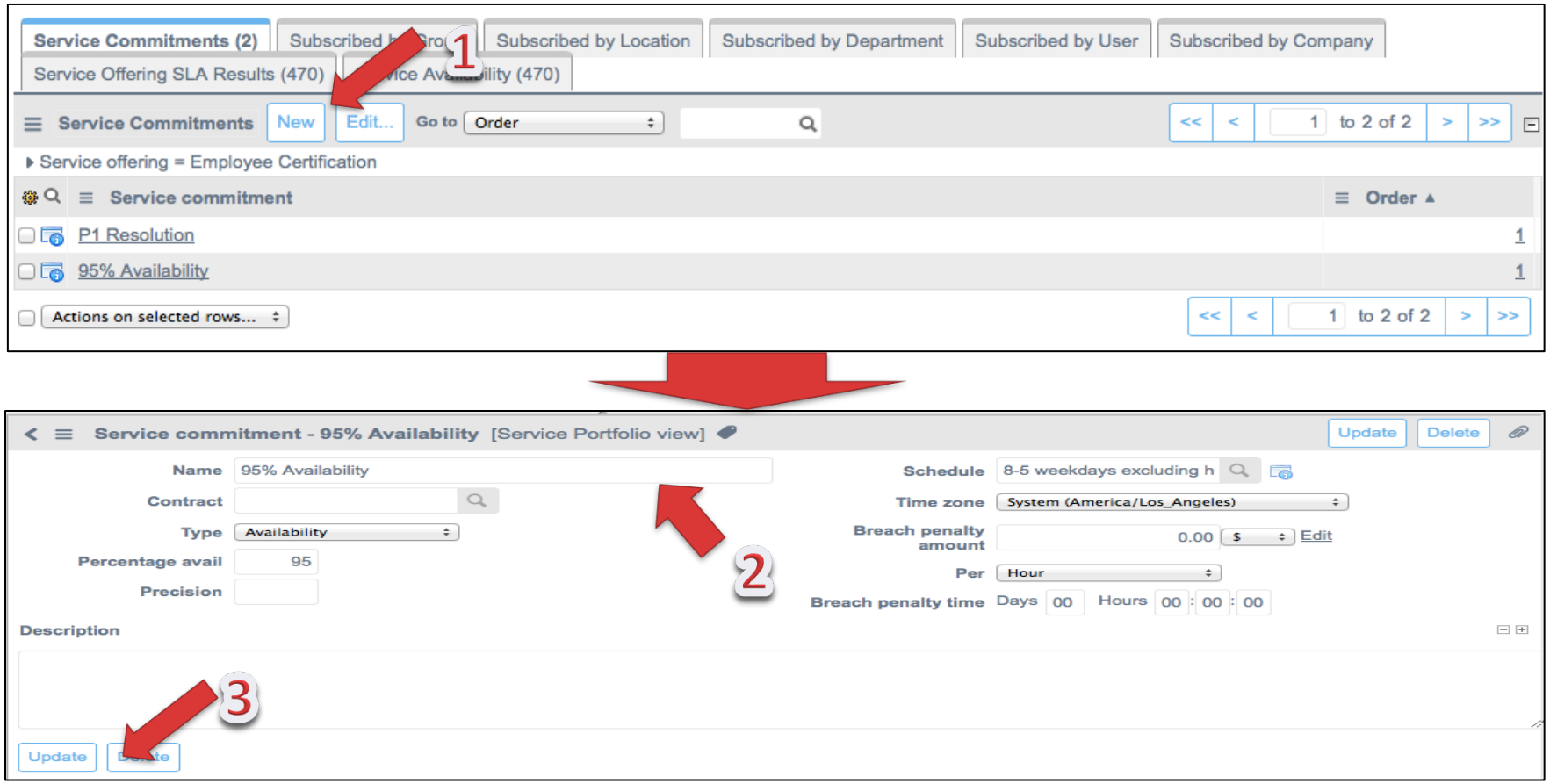
Lab 1: Add a Service Offering



1. From the Business Service select “New” under Service Offering tab
2. Enter any text on your Service Offering
3. Right click header bar and “Save”

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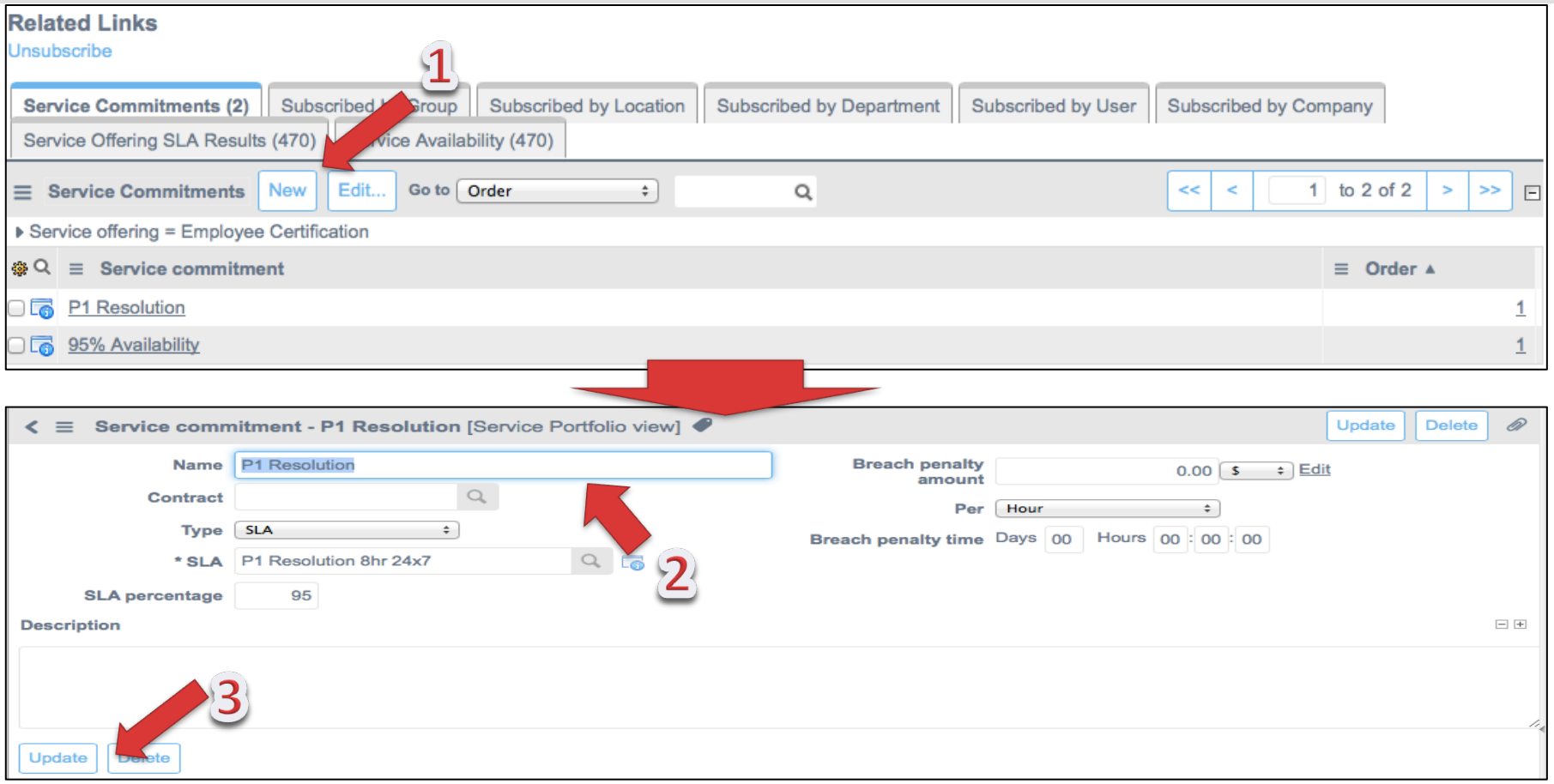
Lab 1: Add an Availability Service Commitment



1. From the Service Offering, select “New” under Service Commitments tab
2. Enter the text on your Availability Service Commitment
3. Click Submit

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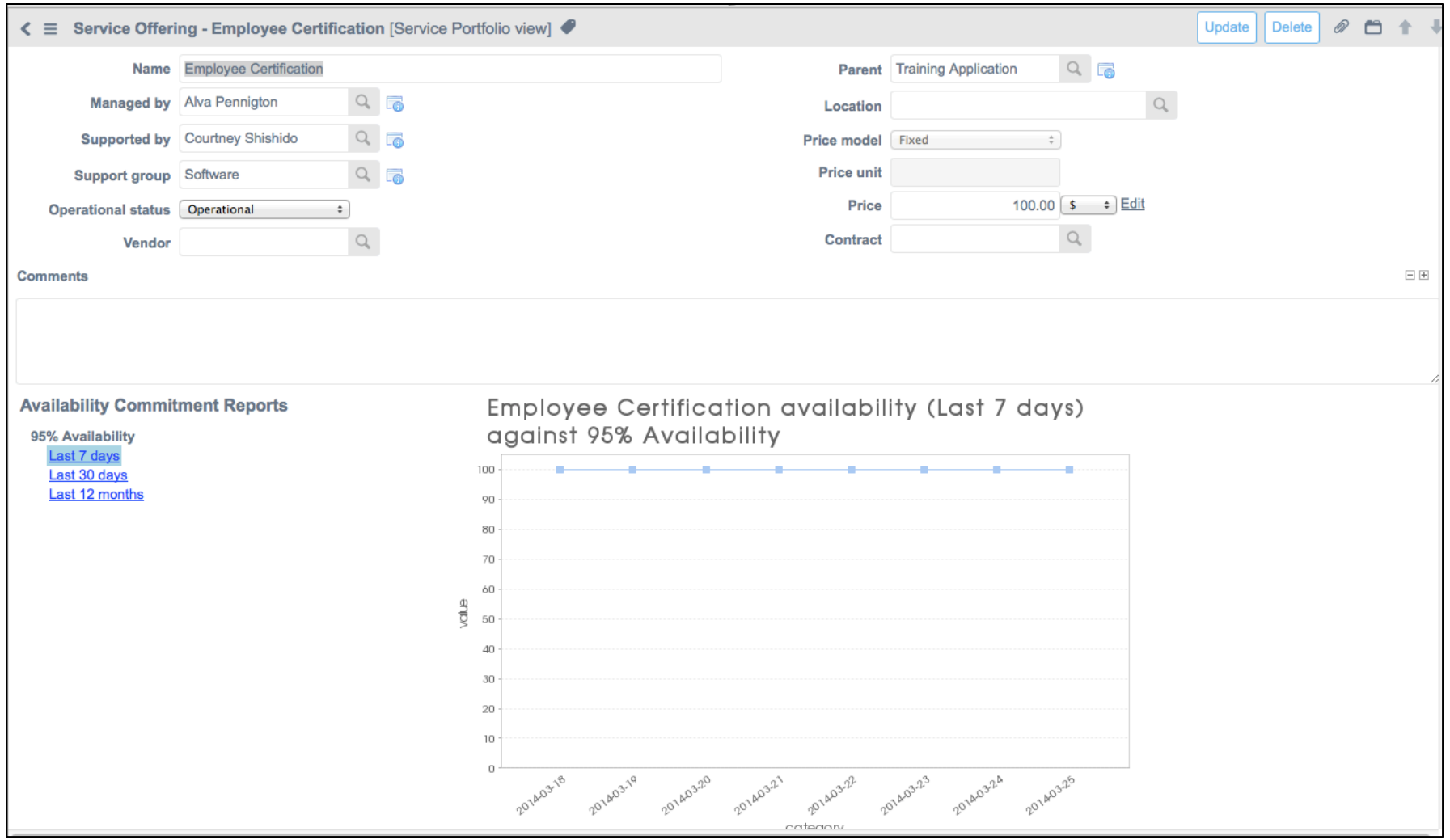
Lab 1: Add an SLA Service Commitment



1. From Service Offering, select “New” under Service Commitments tab again
2. Enter the text on your SLA Service Commitment
   (requires Service Portfolio – SLA Commitments plugin)
3. Click Submit

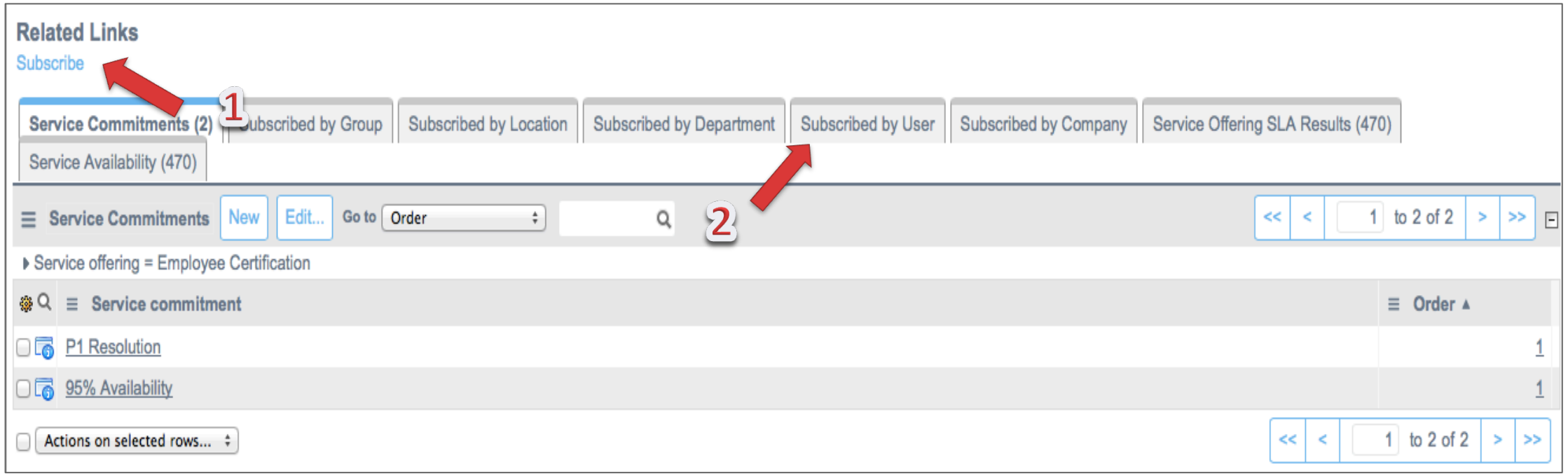
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Lab 1: Intermediate Result



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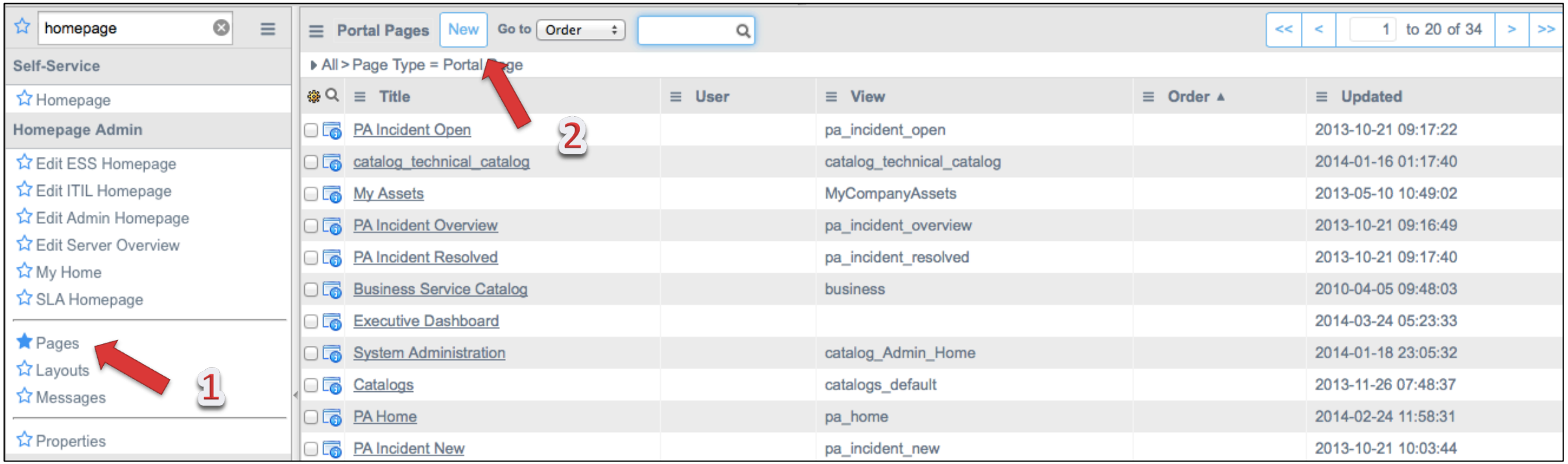
Lab 1: Subscribe to created Business Service



1. Click the “Subscribe” link
2. Check to see that you are in the Subscribed by User tab
   (If not, select “Edit” under Subscribed by User tab and move the user over)

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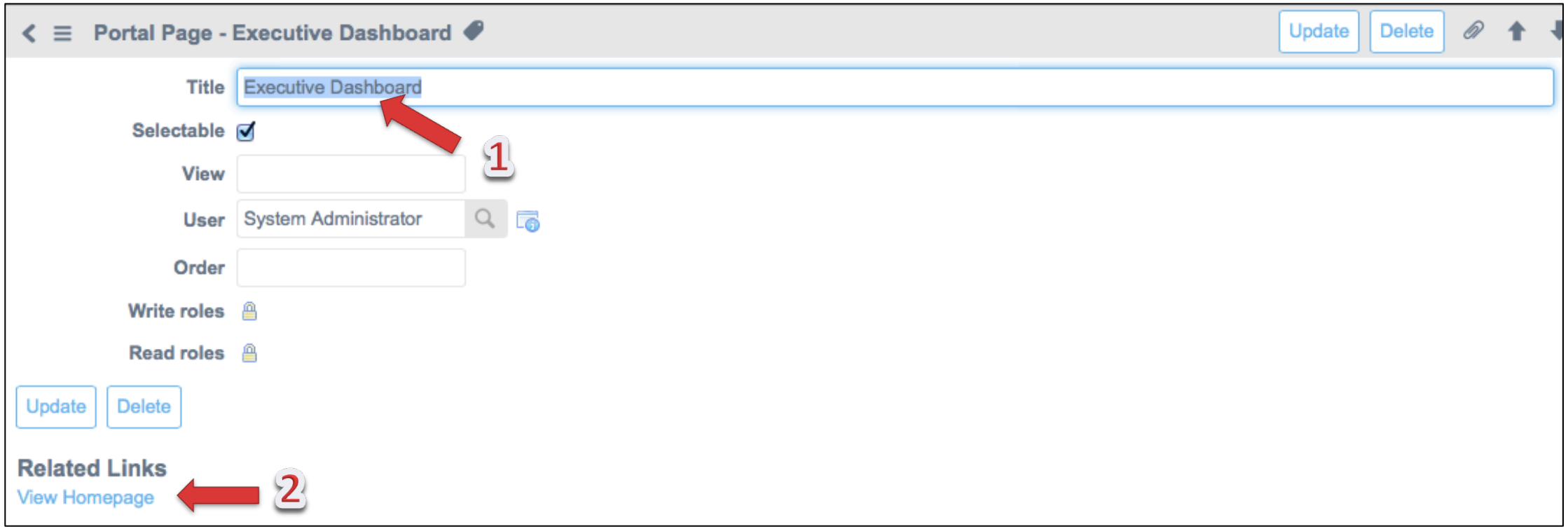
Lab 1: Create a new Executive Dashboard



1. Add Homepage into the type filter text box
2. Select “Pages” from the “Homepage admin”
3. Click “New”

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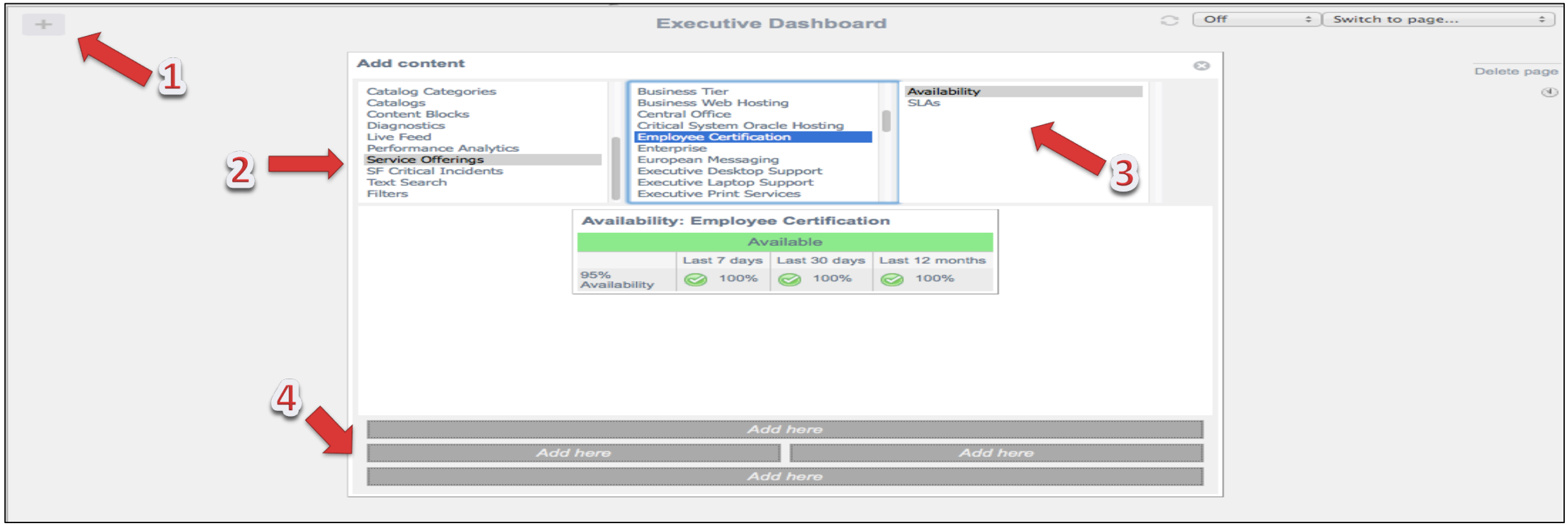
Lab 1: Create a new Executive Dashboard



1. Add a new name for the homepage and set the user to System Administrator
2. Save the homepage and then click the “View Homepage” link

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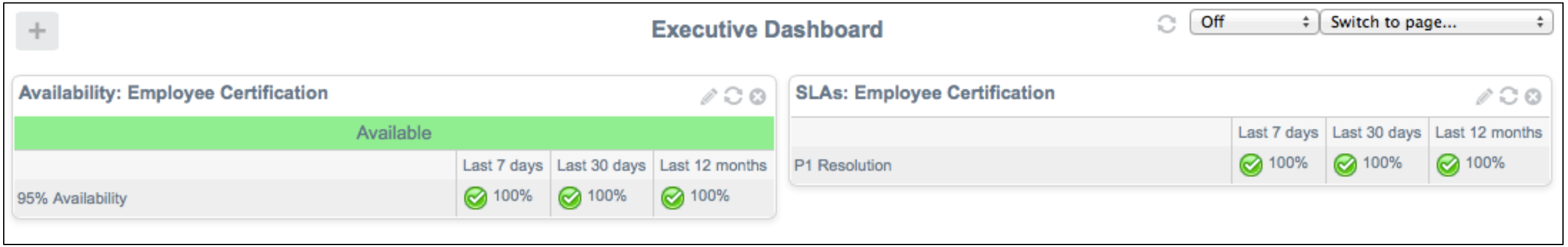
Lab 1: Create a new Executive Dashboard continued



1. Select the Add Content link (takes a second)
2. Scroll down and select “Service Offerings
3. Select one of the items we created
4. Select the location you want
5. Select the close button to see the result

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Lab 1: End Result



- Real world is not this rosy
- Extra credit: Create some drama for our Executives!

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Lab 2

Firing up Financial Management

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Cost Management Concepts

Budget

Cost centers

Dept, group company, etc.

Chargeback

Business service expense lines

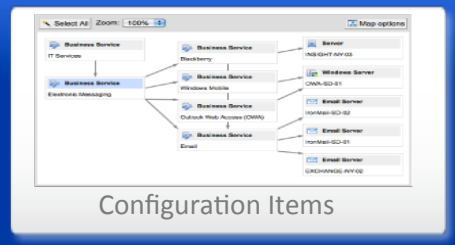
Expense lines

Expense allocations

Summaries

CI costs (recurring)

CI rate cards (template)



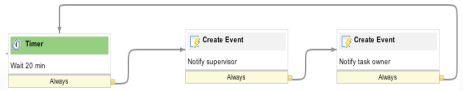
Configuration Items

Distribution costs

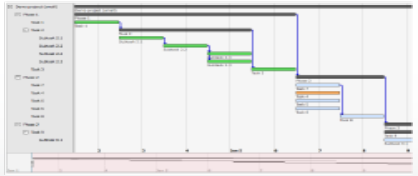
Labor costs

Resource rate cards

Task rate cards



ITIL processes/ operations



Projects

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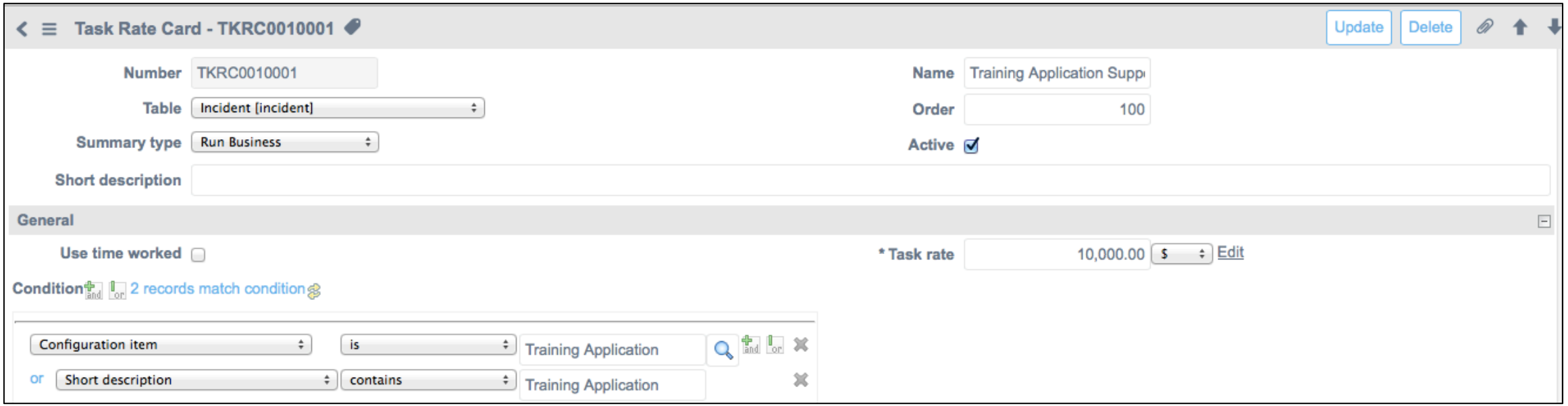
Rate Cards

- **Task Rate Cards** define the type of task and the method of calculating the associated costs.

- **Labor Rate Cards** define worker's labor rates when calculating task cost based on time worked

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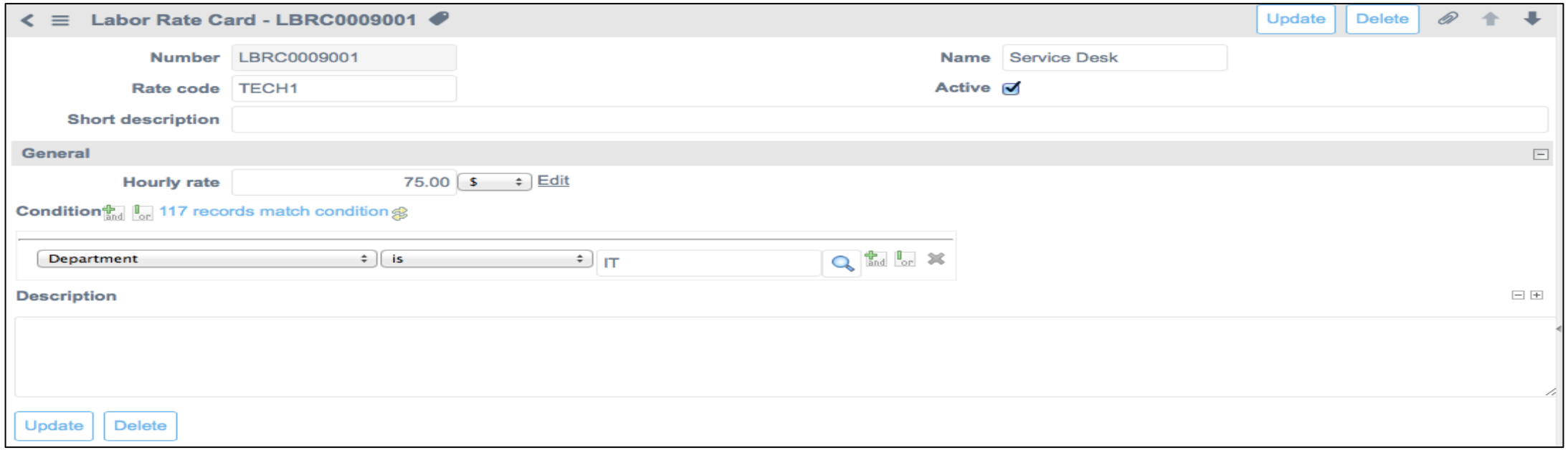
Lab 2: Cost Management – Create a Task Rate Card



- Click on Task Rate Cards under Financial Management
- Click New and enter in the information above

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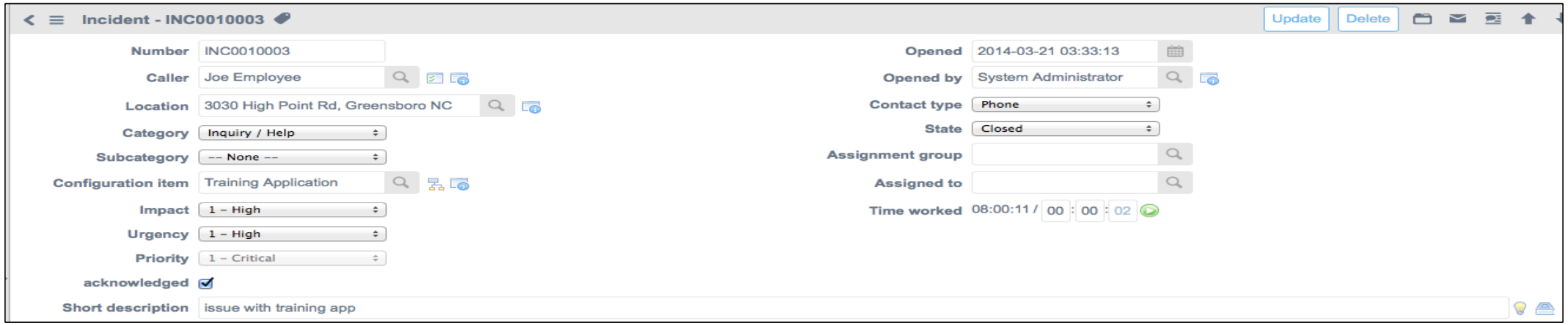
Lab 2: Cost Management – Create a Labor Rate Card



- Click **Labor Rate Cards** under **Financial Management**
- Enter in the above information and click **Submit**

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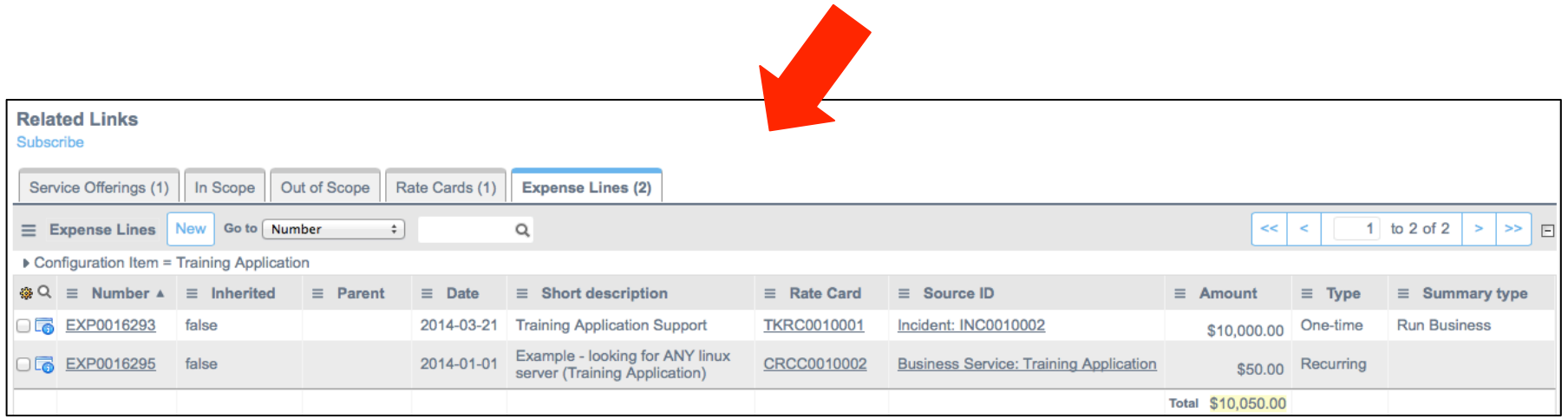
Lab 2: Cost Management – Create a P1 incident



- Create a New Incident (**Incident -> Create New**)
- Enter in the following information:
  Caller: **Joe Employee**
  Configuration Item: **Training Application**
  Priority: **1 – Critical**
  Time worked: **8:00**
- Right click -> **Save**
- Change **Incident State** to **Closed** then click **Update**

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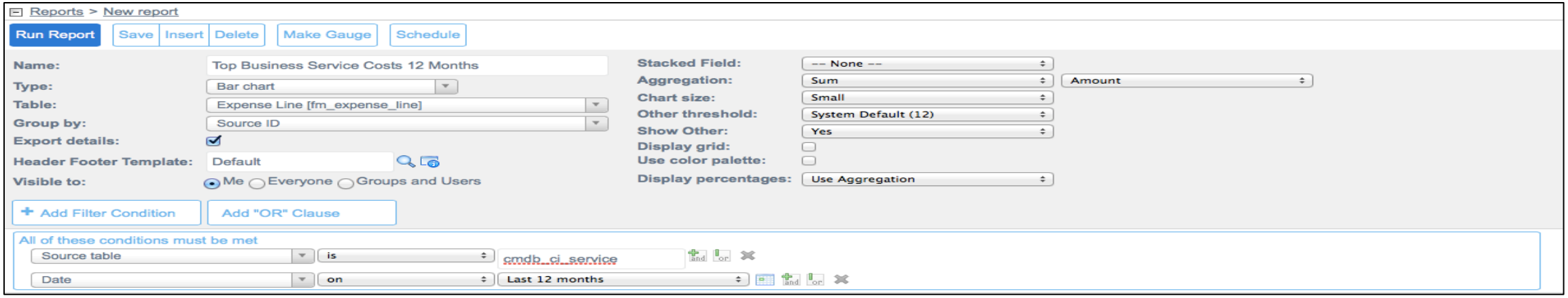
Lab 2: Cost Management – View your Expense Lines



- Navigate to **Business Services** under **Financial Management**
- Click on **Training Application**
- Scroll down to see your expense lines!

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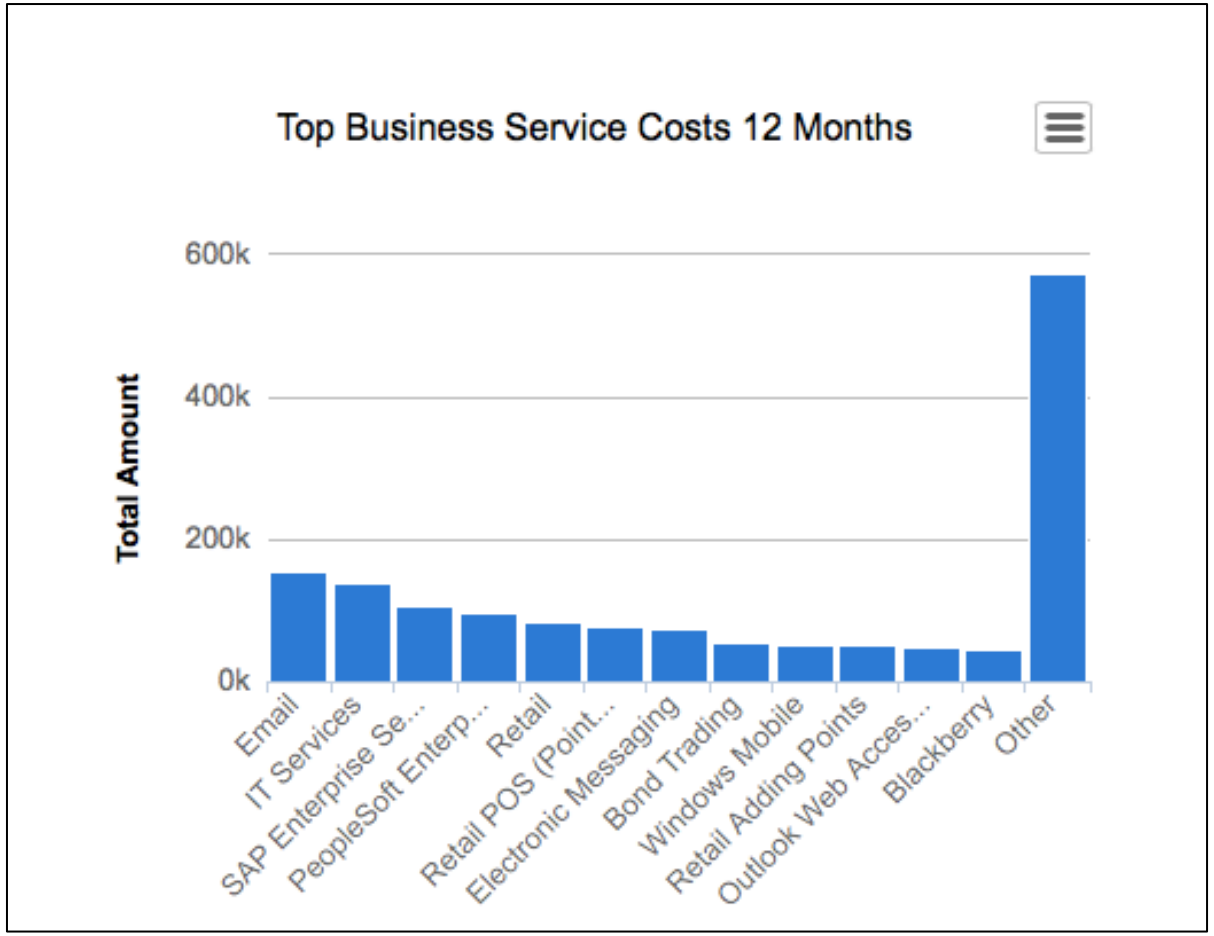
Lab 2: Cost Management – Build Business Service Cost Report



- Navigate to View/Run Report, click New under Global Reports
- Enter the information above
- Click Run Report
- Make a gauge so we can add it to the homepage

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Result

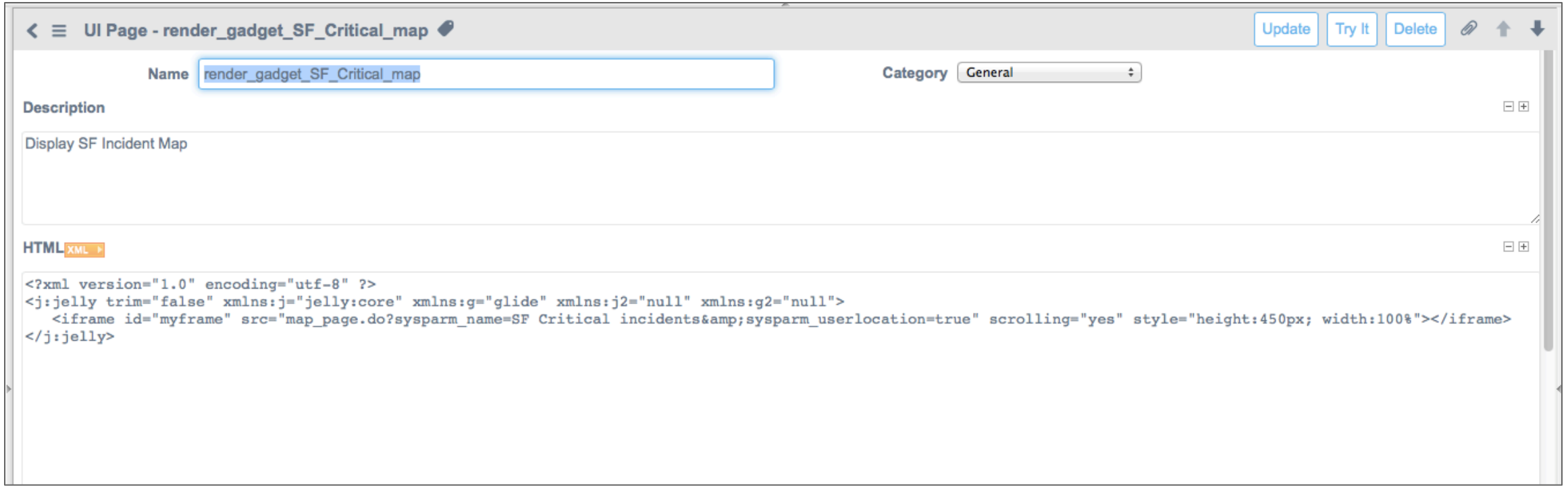


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Lab 3
Where is the Work?

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Lab 3: Maps – Now let's Create a UI Page



- Navigate to UI Pages, click New
- Enter the information above and the HTML provided

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Lab 3: Maps – UI Page Script

```
<?xml version="1.0" encoding="utf-8" ?>

<j:jelly trim="false" xmlns:j="jelly:core" xmlns:g="glide" xmlns:j2="null" xmlns:g2="null">

   <iframe id="myframe" src="map_page.do?sysparm_name=SF Critical
incidents&amp;sysparm_userlocation=true" scrolling="yes" style="height:450px; width:100%"></iframe>

</j:jelly>
```

- Save the UI Page
- Now we have to create a widget to expose the UI Page to the Homepage

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Lab 3: Maps – Create a Widget



- Navigate to Widgets, click New
- Enter the information above and the script provided

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Lab 3: Maps – Widget Script

```
function sections() {
    return {
      'SF Critical Incidents' : { 'name' : 'render_gadget_SF_Critical_map' }
    };
}

function render() {
  var name = renderer.getPreferences().get("name")
  var gf = new GlideForm(renderer.getGC(), name, 0);
  gf.setDirect(true);
  gf.setRenderProperties(renderer.getRenderProperties());
  return gf.getRenderedPage();
}

function getEditLink() {
  if (!gs.hasRole('admin'))
     return '';

  return "sys_ui_page.do?sysparm_query=name=" + renderer.getPreferences().get("name");
}
```

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Lab 3: Maps – Let's add the new map to the Homepage



- Open up the homepage and select content
- Add the map to the bottom of the screen

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Lab 4

Add a Response KPI!

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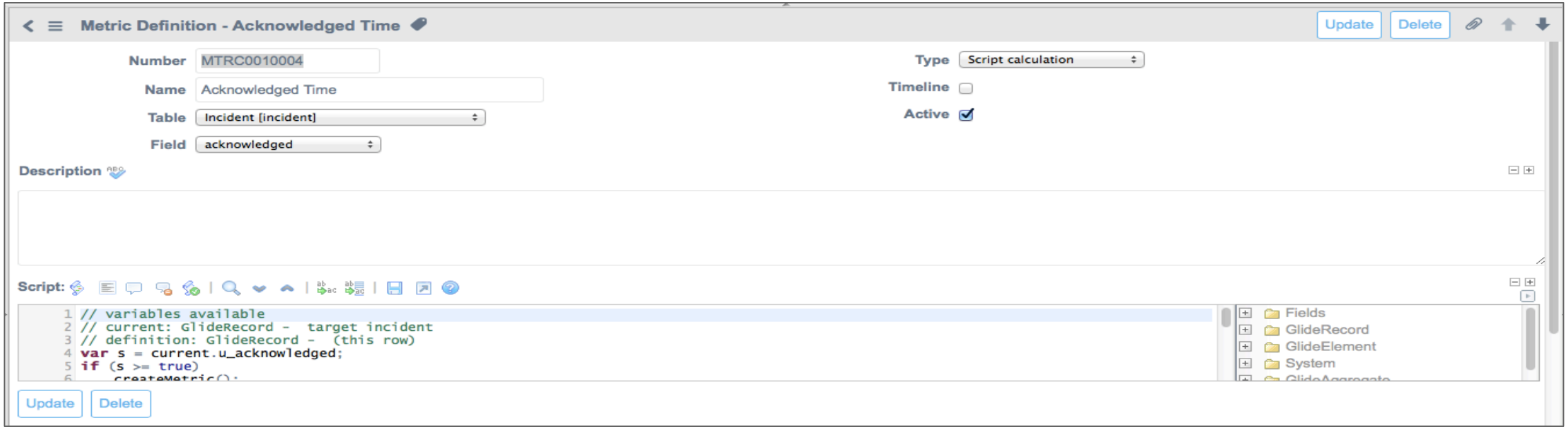
Lab 4: Metric – Let's try making a metric

- Navigate to Incident table
- Right click and select personalize form
- Add a new True/False (Boolean) field call **acknowledged**
- Move the field up on the screen where you want it and save the form



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Lab 4: Metrics – Let's try making a metric



- Navigate to Metric Definition, click New
- Set the Table = Incident, Field = Acknowledged, Type = Script
- Enter the information above and the script provided

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Lab 4: Metrics – Metric Script

```
// variables available
// current: GlideRecord -  target incident
// definition: GlideRecord -  (this row)
var s = current.u_acknowledged;

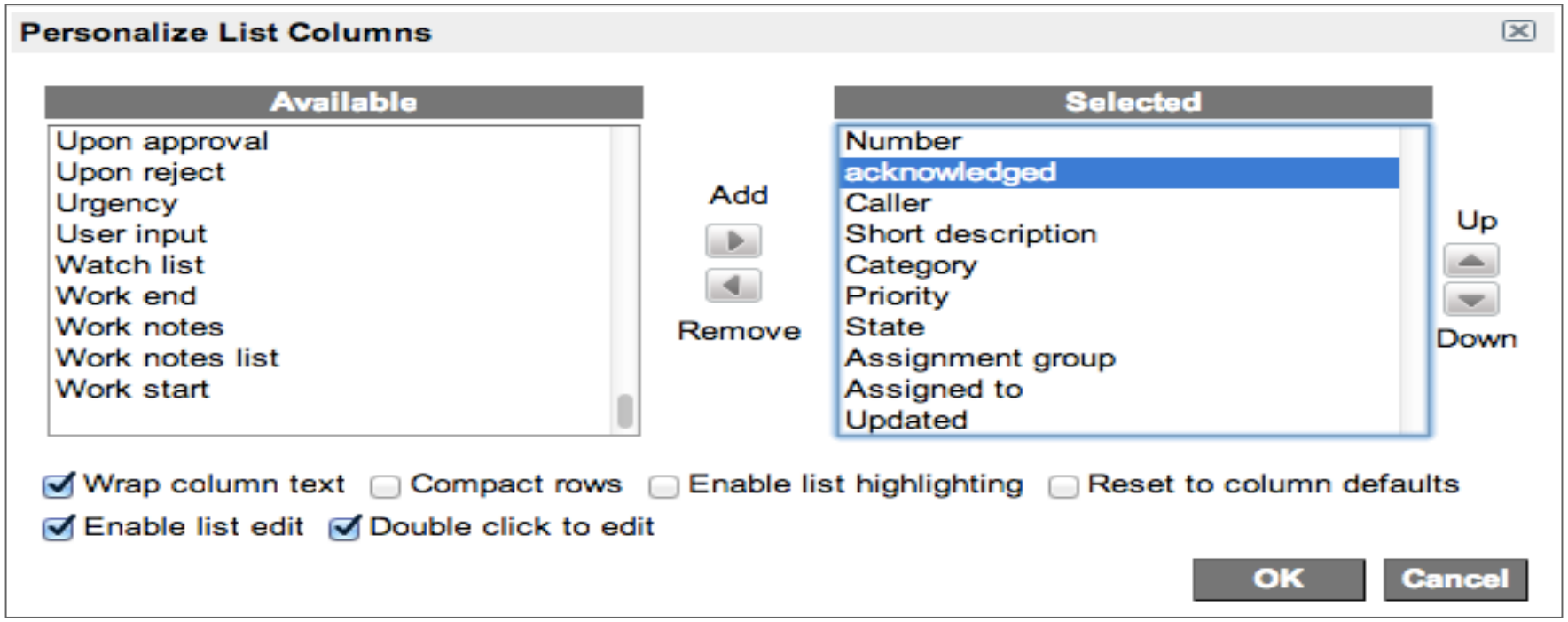
if (s >= true)
    createMetric();
function createMetric() {
    var mi = new MetricInstance(definition, current);
    if (mi.metricExists())
        return;

    var gr = mi.getNewRecord();
    gr.start = current.sys_created_on;
    gr.end = current.sys_updated_on;
    gr.duration = gs.dateDiff(gr.start.getDisplayValue(), gr.end.getDisplayValue());
    gr.calculation_complete = true;
    gr.insert();
}
```

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Lab 4: Metrics – Let's try making a metric

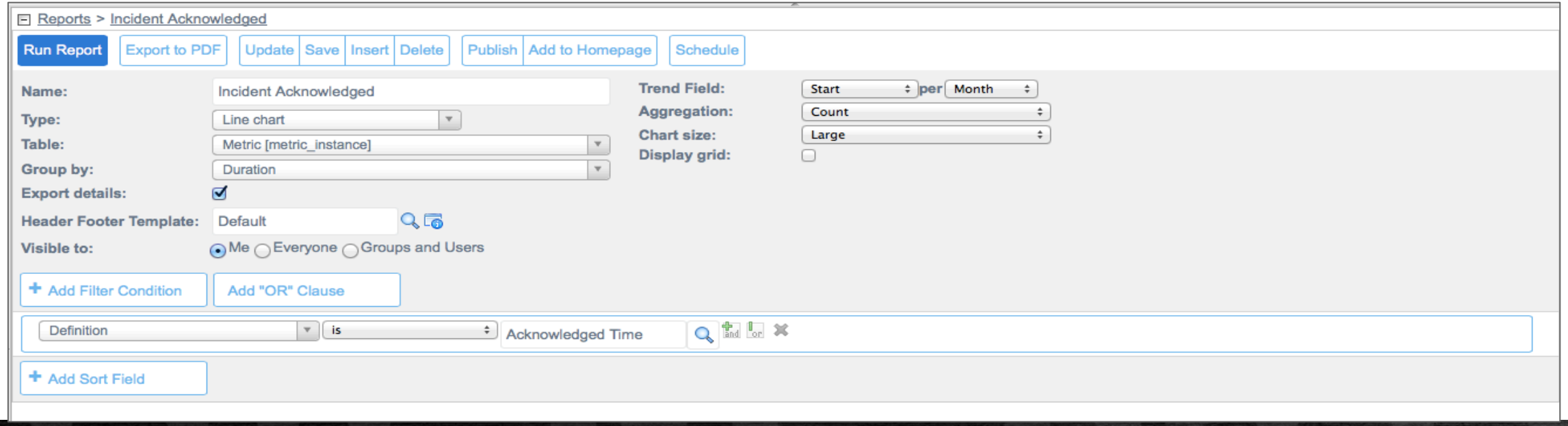
- Add acknowledged to the list view of the incident form
- Now select some to be set to true to get some metric data



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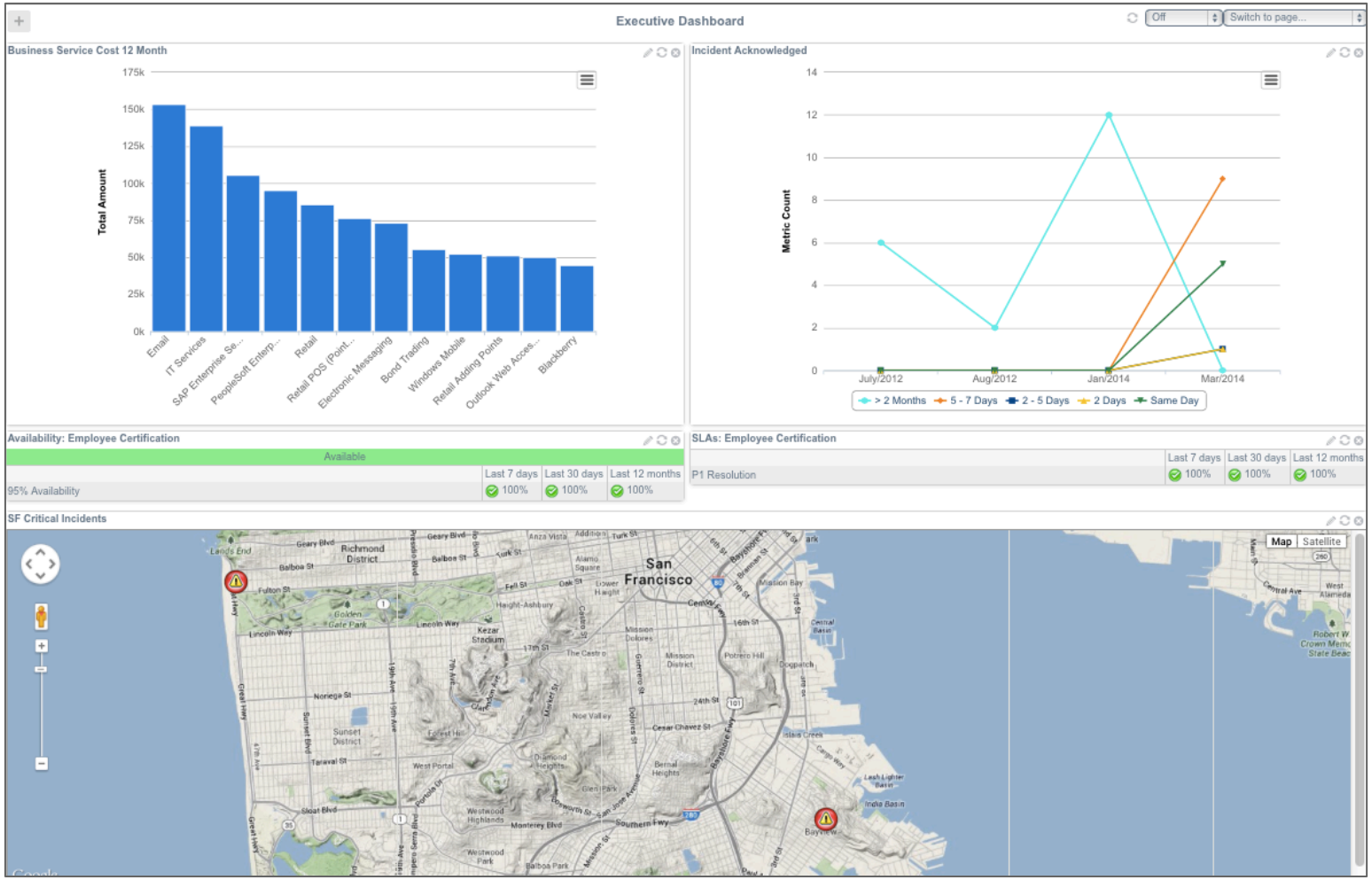
Lab 4: Metrics – Let's try making a metric

- Now we need to report against the Metric
- Navigate to Reports and create a new one
- Set the Type = Line Chart, Table = Metric, Group by = Duration
- Field Trend = Start, per = Month
- Filter by Definition is Acknowledged Time
- Then make a gauge – navigate to the Executive Dashboard and add the gauge



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We should now have a killer dashboard!



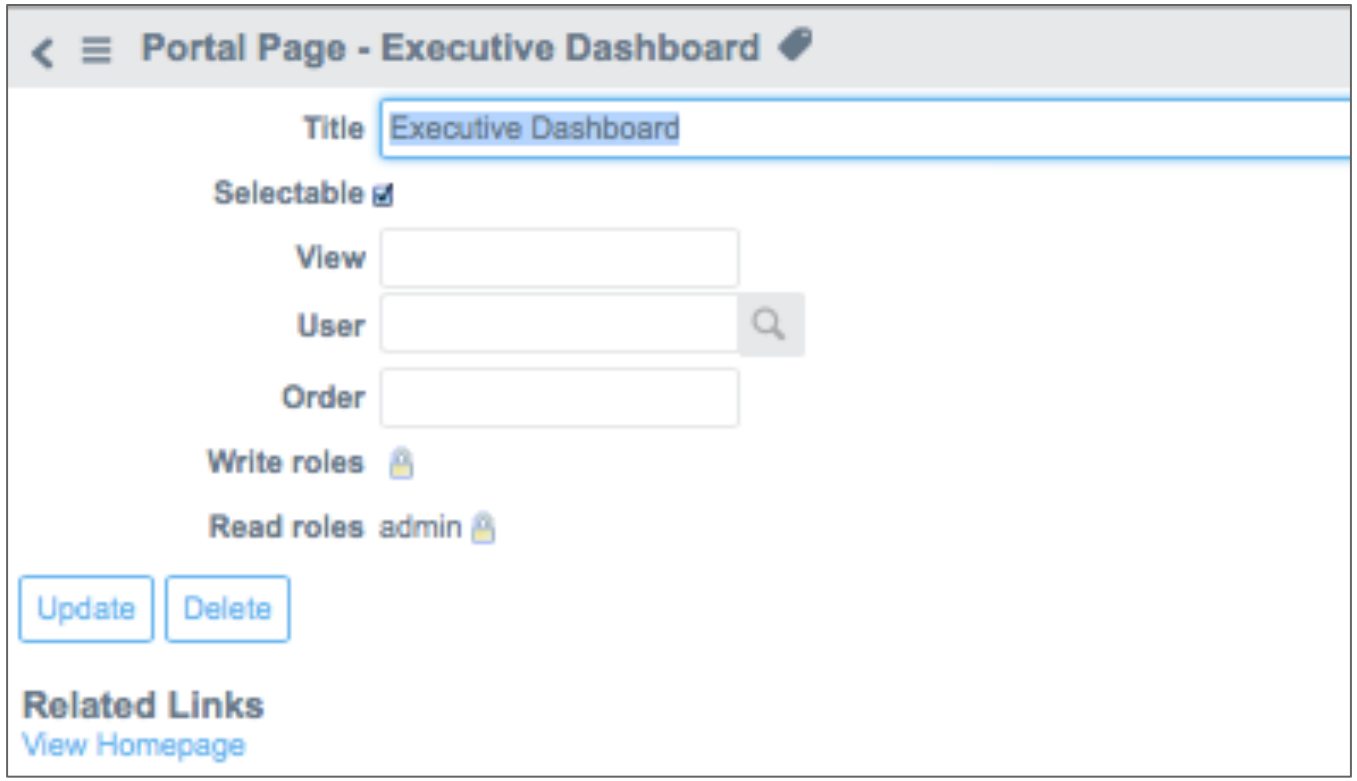
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Lab 5

Who is Going to See This Killer Dashboard?

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Lab 5: Roles – Control the Homepage



- Open up the homepage
- Add the Admin to Read roles
- Make it Selectable

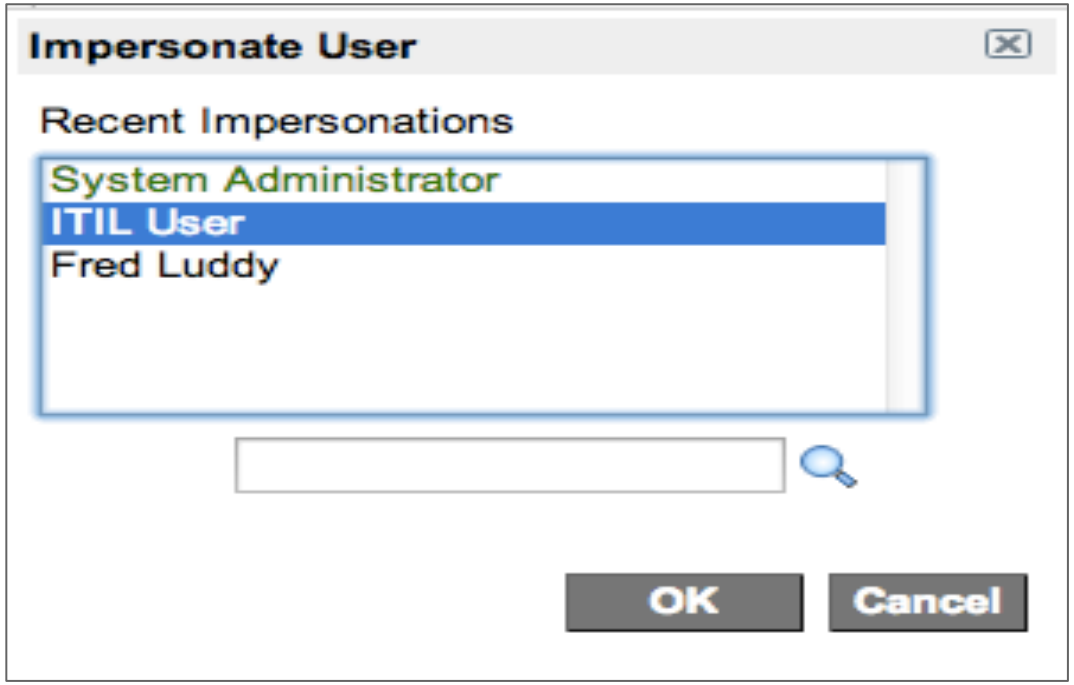
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Lab 5: Roles – Try it try swapping users



- Now you're the ITIL user try and select the Executive Homepage
- Swap back to admin and try again.

- Use the "Head and Shoulders" to impersonate users
- Select the ITIL users – this user does not have admin rights



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Top Takeaways

1 CIOs are fickle about reports & dashboards

2 CIOs like service reliability and visibility

3 Common business areas are a good starting point

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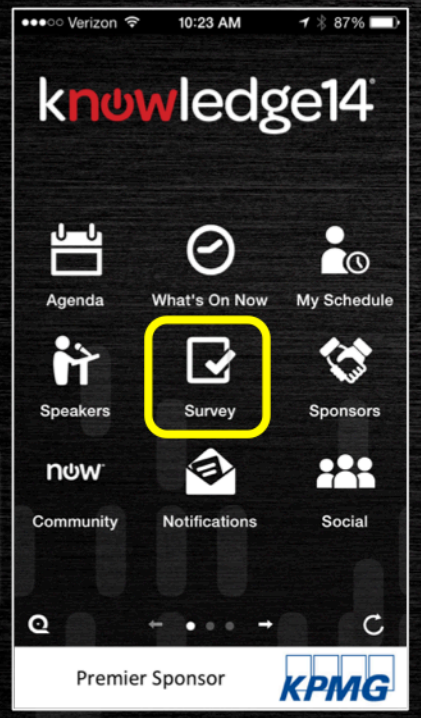
Top Takeaways

4 Examples are appropriate for all levels

5 What other stakeholders can we provide value to?

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Thank You

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Sr. Solution Consultant

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Neil.Morris@servicenow.com

Ryan Fraser

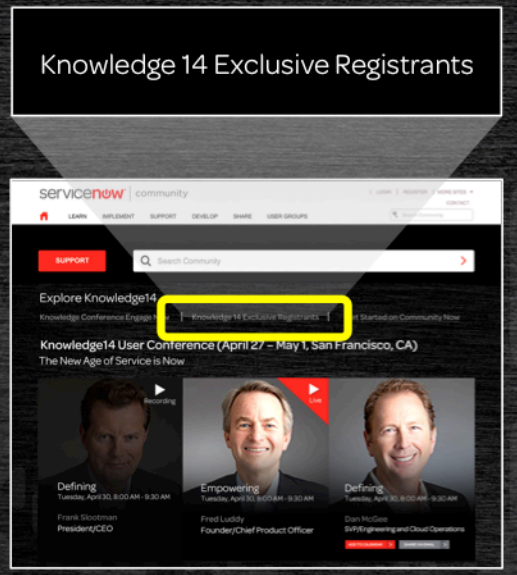
Sr. Solution Consultant

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Ryan.Fraser@servicenow.com

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Additional Resources

- Task and Labor Rate Cards
  - http://wiki.service-now.com/index.php?title=Managing_Task_and_Labor_Rate_Cards
- Service Portfolio Management
  - http://wiki.service-now.com/index.php?title=Service_Portfolio_Management
- SLA Commitments
  - http://wiki.service-now.com/index.php?title=Service_Portfolio_Management_-_SLA_Commitments
- Time Cards
  - http://wiki.servicenow.com/index.php?title=Time_Cards

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