Lab Guide

PA 201:

Achieving Continual Service Improvement

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Lab Goal

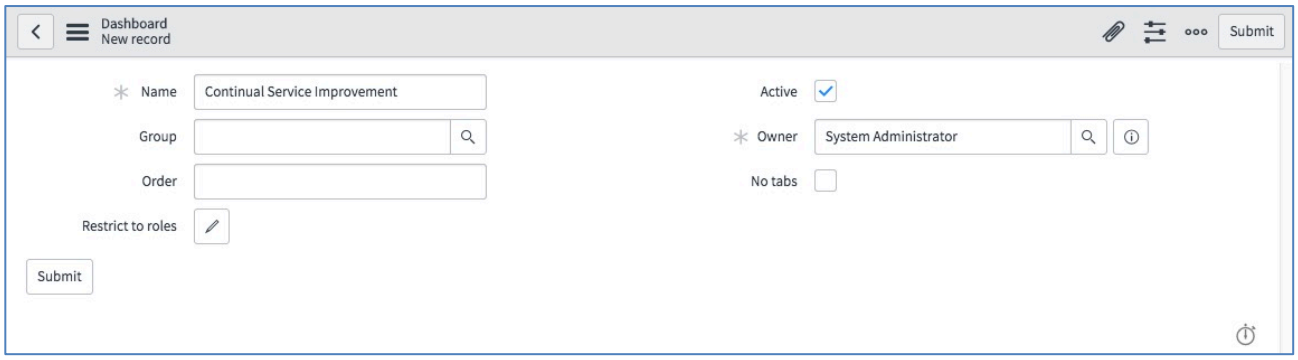
Lab 1.0
Create a Time Series Widget

In this lab you will create a time series widget that demonstrates how important the context of time is to a KPI.

- Adding a widget wireframe to a dashboard
- Creating a new Performance Analytics widget
- Styling a Performance Analytics widget

Create the Dashboard

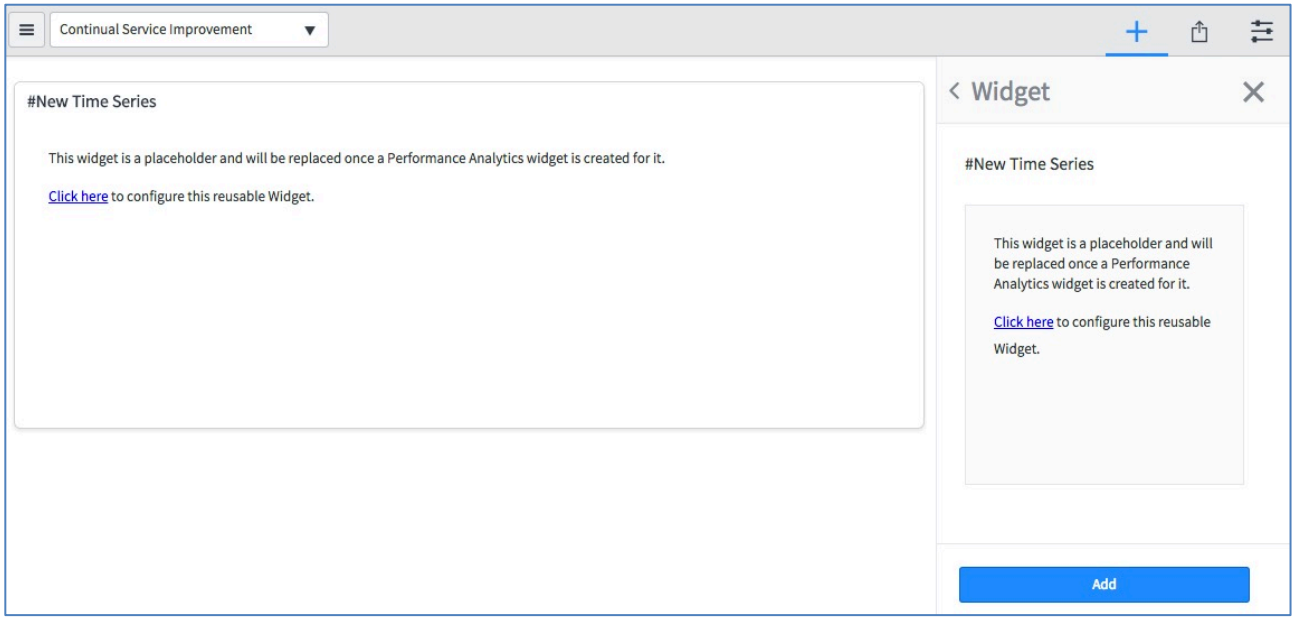
1. Navigate to **Performance Analytics -> Dashboards** in the left navigation.
2. Click the three bars in the upper-left to open the context menu; choose **New Dashboard.**
3. Name the dashboard **Continual Service Improvement**.



4. Submit.
5. Ensure the + is selected in the upper-right.
6. Choose **Performance Analytics** in the flyout.
7. Choose **Time Series** in the presented options.
8. Choose **#New Time Series** in the presented options.

9. Click the blue **Add** button.

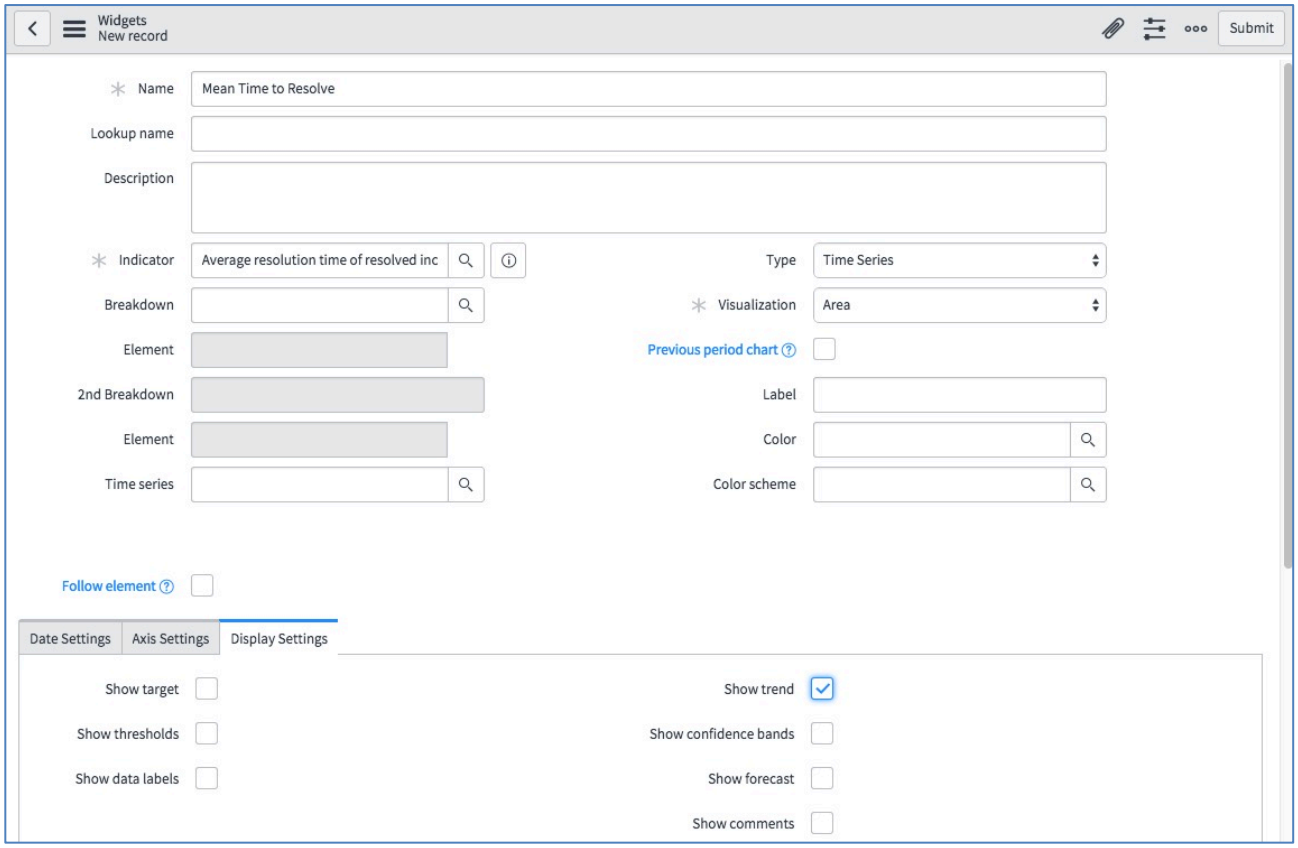
10. In the dashboard widget just added (not in the right flyout pane), click the link **Click Here**.



Create a Time Series Widget

1. Fill out the widget properties as below.

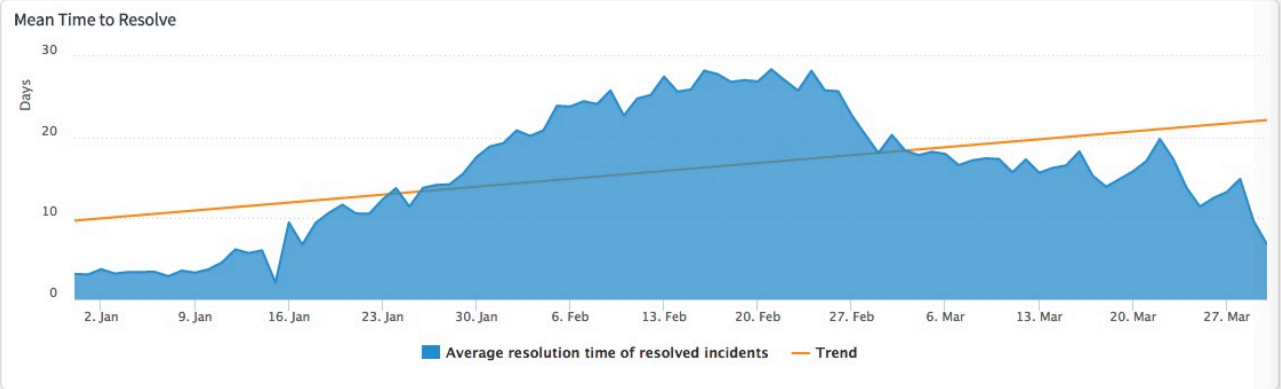
   Name: **Mean time to Resolve**
   Indicator: **Average resolution time of resolved incidents**
   Visualization: **Area**
   Show trend: **True**



2. Submit.

Lab Verification

1. Your widget should look like this.



Lab Goal

Lab 2.0
Add a Time Series with Influence

In this lab you will create a time series widget that demonstrates how important the context of influence is to a KPI.

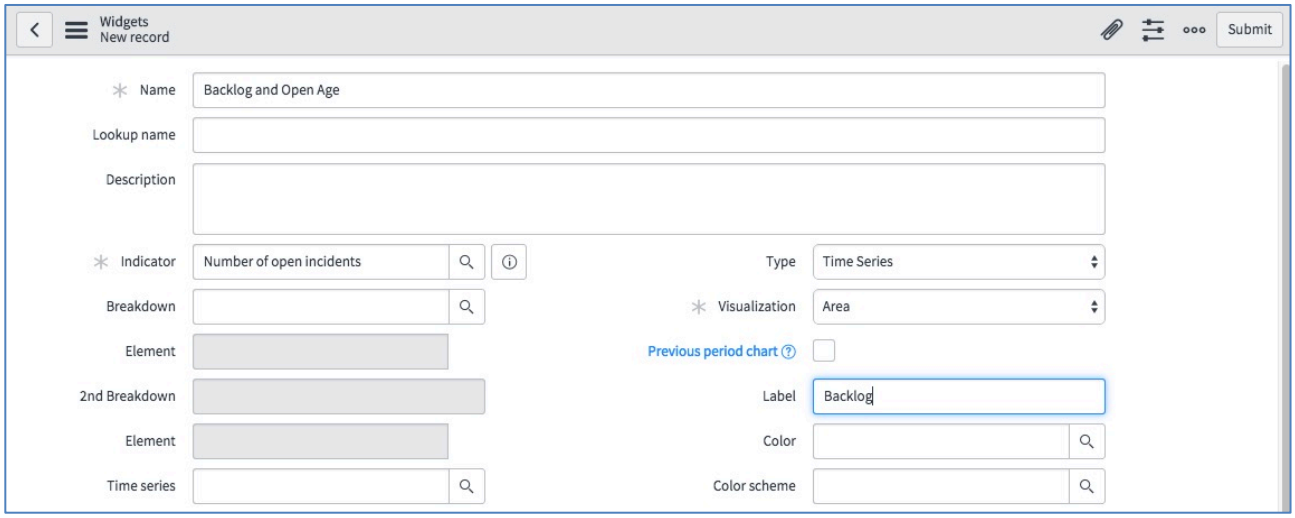
- Add additional widgets to a dashboard
- Add multiple indicators to a single widget
- Styling a Performance Analytics widget

Add Another Time Series Widget

1. Navigate to **Performance Analytics -> Dashboards** in the left navigation. Find your **Continual Service Improvement** dashboard.
2. Ensure the **+** is selected in the upper-right.
3. Choose **Performance Analytics** in the flyout.
4. Choose **Time Series** in the presented options.
5. Choose **#New Time Series** in the presented options.
6. Click the blue **Add** button.
7. In the dashboard widget just added (not in the right flyout pane), click the link **Click Here**.

8. Fill out the widget properties as below.

   Name: **Backlog and Open Age**
   Indicator: **Number of open incidents**
   Visualization: **Area**
   Label: **Backlog**

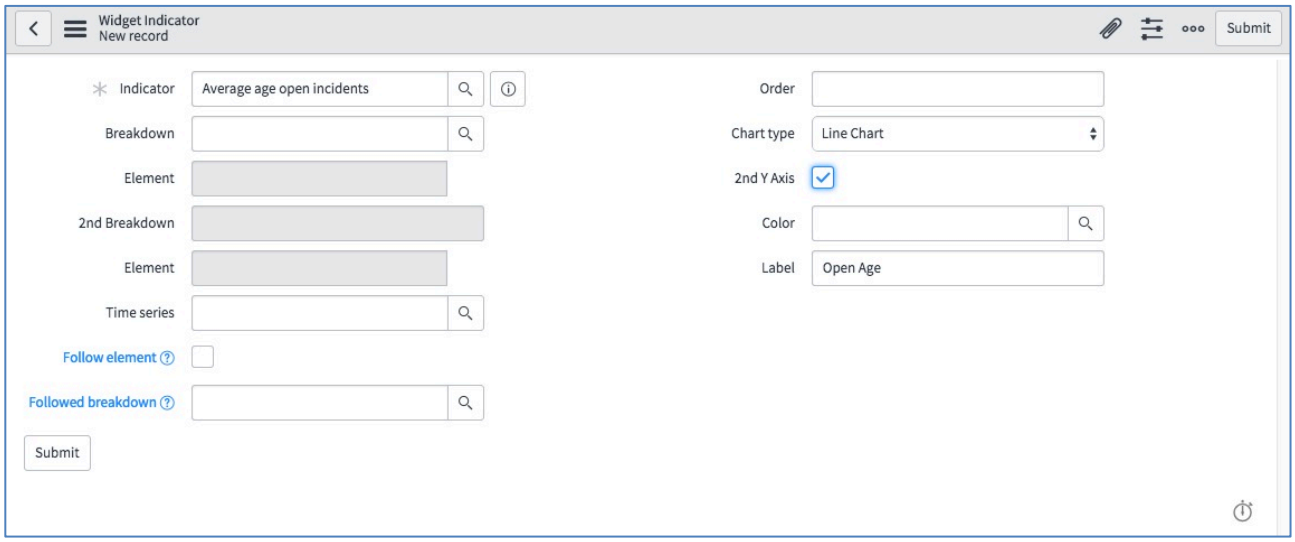


9. Use the context menu, or right-click on the header bar and click **Save.**

10. At the bottom of the page, find the **Widget Indicators** related list. Click the **New** button.

11. Fill out the form with the properties as below.

    Indicator: **Average age open incidents**
    2nd Y Axis: **True**
    Label: **Open Age**

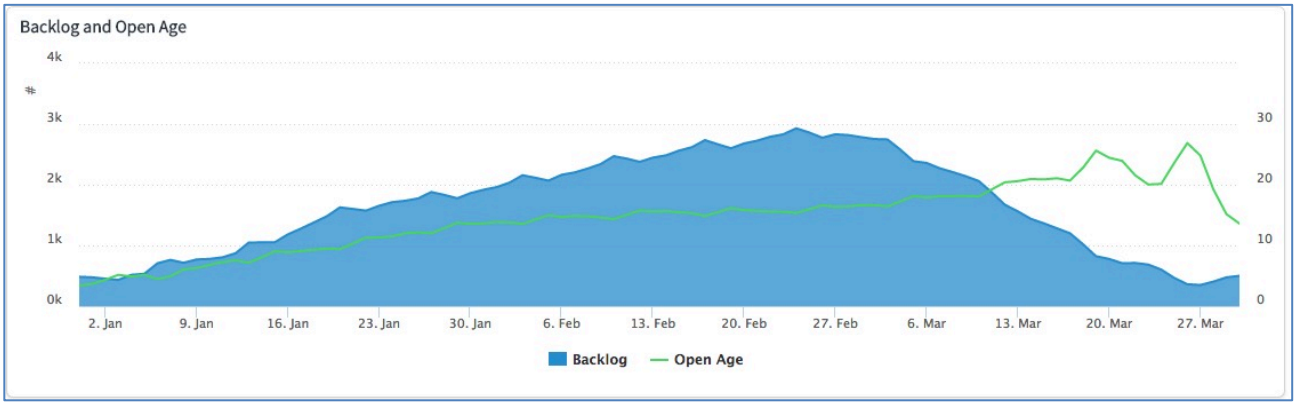


12. Submit.

13. Update will return you to the dashboard.

Lab Verification

1. Your widget should look like this.



Lab Goal

Lab 3.0 Create a Breakdown Dashboard

In this lab you will create a dashboard that filters all widgets on the page to demonstrate context for people viewing the dashboard.

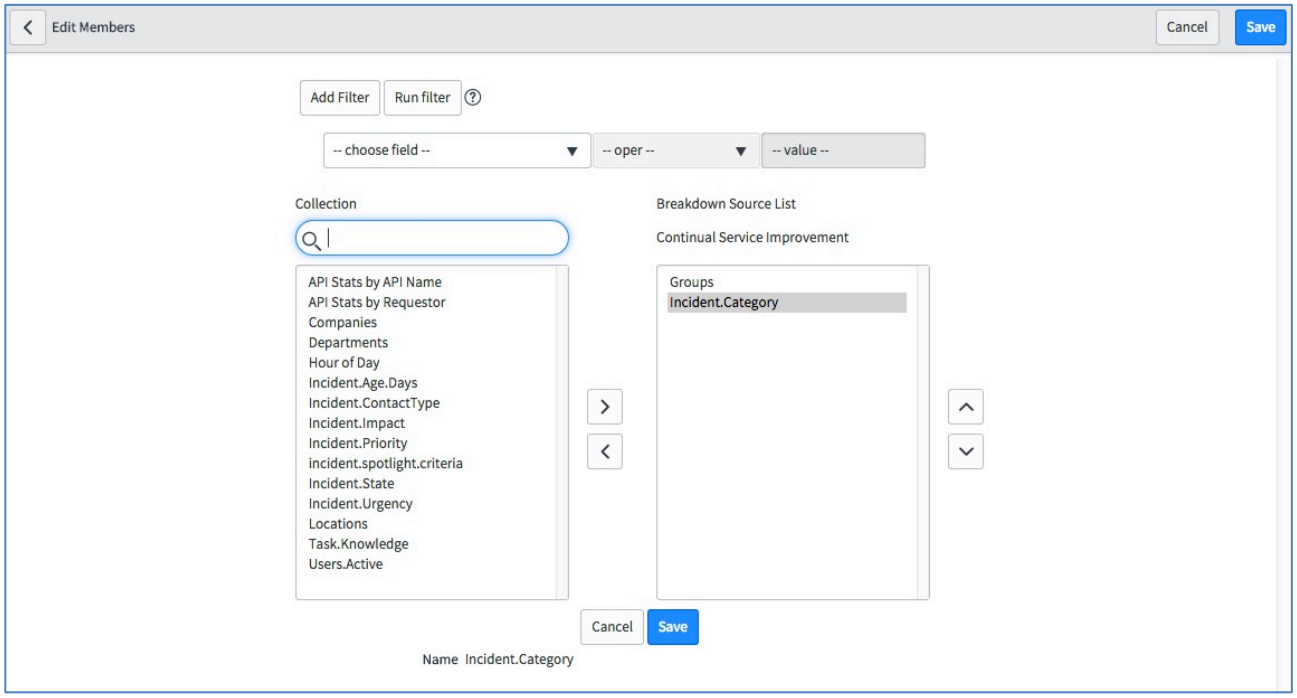
- Add a breakdown to the dashboard.
- Configure widgets to follow the breakdown.

Add the source to the dashboard

1. Navigate to **Performance Analytics -> Dashboards** in the left navigation.
2. Click the three bars in the upper-left to open the context menu, choose **Dashboard Properties.**
3. Find the related list **Breakdown Source** and choose the blue **Edit** button.

4. Find the appropriate sources to add to the right side of the slushbucket.

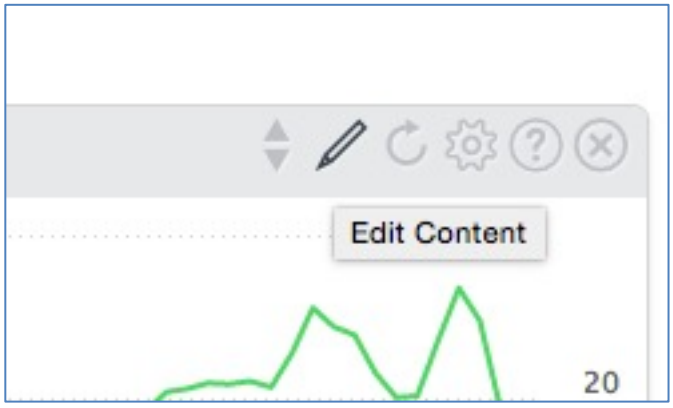
   Groups
   Incident.Category



5. Click the blue **Save** button. **Update** on the dashboard properties page will return you to the dashboard.

Update the widgets to follow the breakdown

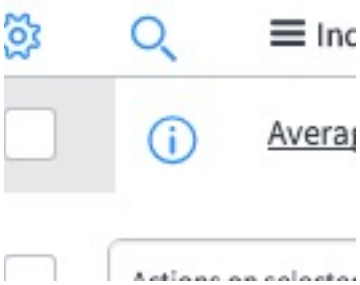
1. Hover over the upper-right corner of the **Backlog and Open Age** widget in order to make the **pencil** icon appear, then click the **pencil** icon.



2. Mark **true** the **Follow Element** field.

3. **Save** the record.

4. Navigate to the related list for **Widget Indicators**. Click the reference icon for the **Average Age open incidents** record listed there.



5. Mark **true** the **Follow Element** field.

6. Click **Update** to return to the widget. Click the back arrow in the pane to return to the dashboard.

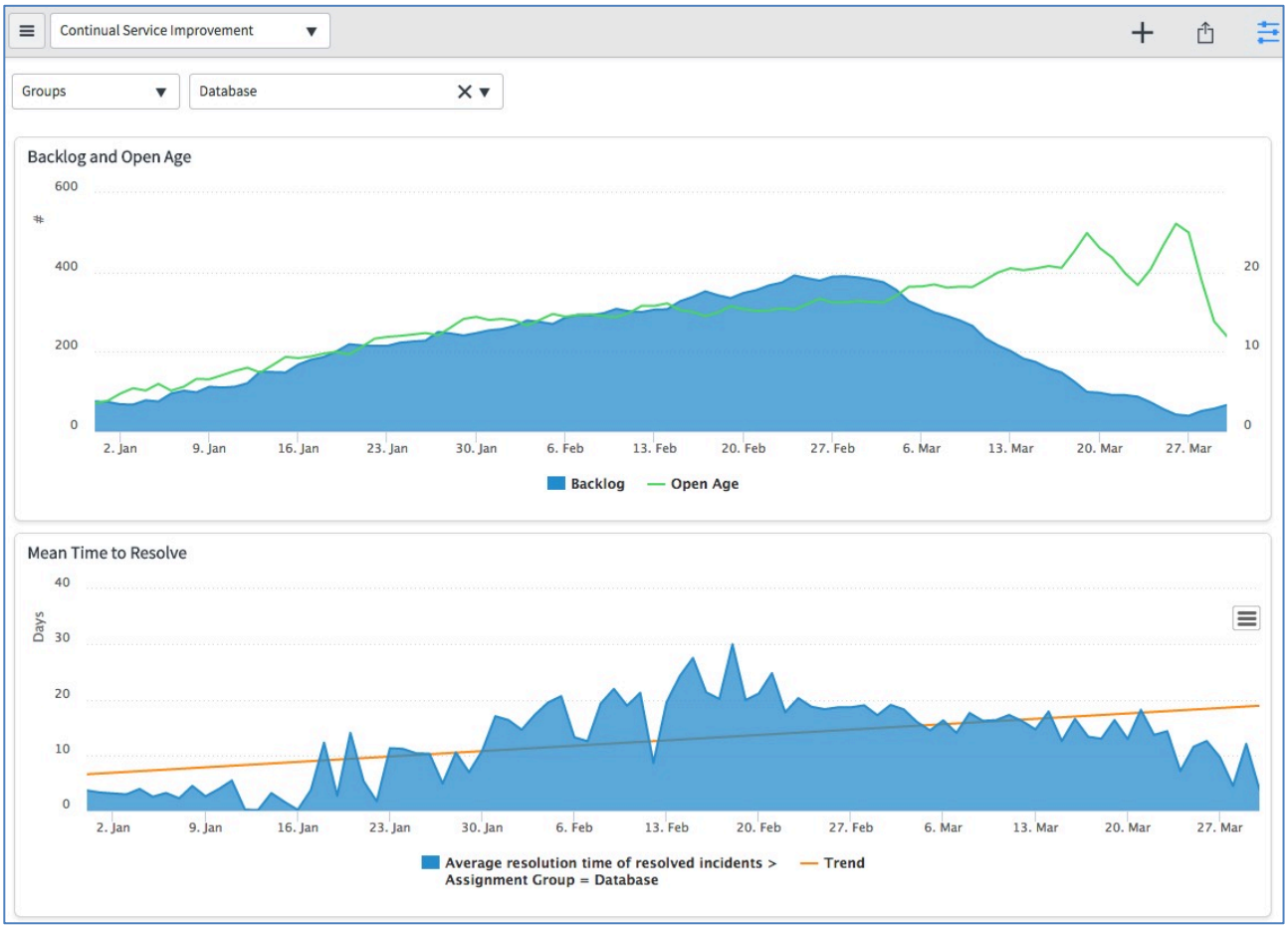
7. Hover over the upper-right corner of the **Mean time to resolve** widget in order to make the **pencil** icon appear, then click the **pencil** icon.

8. Mark **true** the **Follow Element** field.

9. Click **Update** to return to the dashboard.

Lab Verification

1. Your dashboard should filter as follows when an element is selected.



Lab Goal

Lab 4.0 Create Spotlight Criteria

In this lab you will create spotlight criteria to evaluate records and determine where to take action.

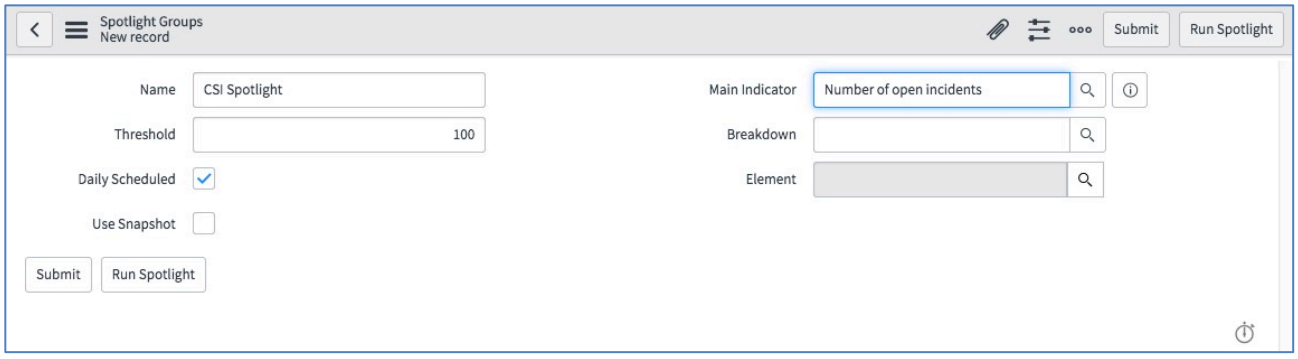
- Create a spotlight group.
- Add criteria based on a goal.
- Run the spotlight collection.

Create a Spotlight Group with criteria

1. Navigate to **Spotlight-> Spotlight Groups** in the left navigation.

2. Click the blue **New** button, and fill out the form as below.

   Name: **CSI Spotlight**
   Main Indicator: **Number of open incidents**
   Threshold: 100
   Daily Scheduled: **True**
   Use Snapshot**: False**



3. Use the context menu or right-click on the header bar and click **Save.**

4. Navigate to the related list for **Spotlight Criteria**. Click the blue **New** button.

5. You will be entering in multiple criteria. Ensure you are using **Insert and Stay** to speed up the process. Enter the criteria below, each in their own record.

   Name: **Aging Incidents 06-30**
   Weight: **75**
   Indicator: **Number of open incidents**
   Breakdown: **Age**
   Element:**06-30 days**
   Save

   Name: **Aging Incidents 31-90**
   Weight: **125**
   Indicator: **Number of open incidents**
   Breakdown: **Age**
   Element: **31-90 days**
   Insert and stay

   Name: **Aging Incidents 90+**
   Weight: **175**
   Indicator: **Number of open incidents**
   Breakdown: **Age**
   Element: **90+ days**
   Insert and stay

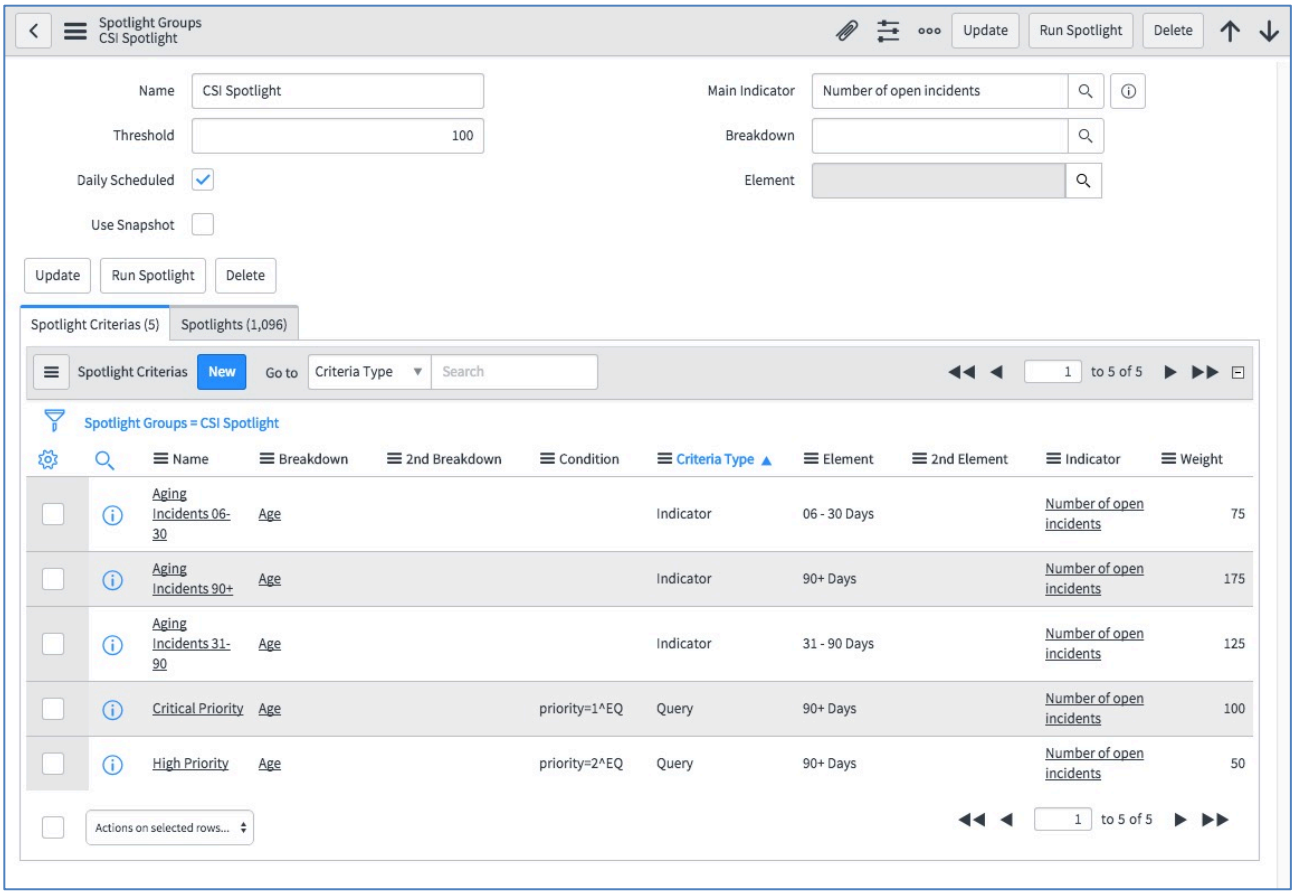
   Name: **High Priority**
   Criteria Type: **Query**
   Weight: **50**
   Condition: **Priority – is – 2-High**
   Insert and stay

   Name: **Critical Priority**
   Criteria Type: **Query**
   Weight: **100**
   Condition: **Priority – is – 1-Critical**
   Insert

6. Back on the **Spotlight Group** record, click **Run Spotlight.**

Lab Verification

1. Your spotlight group record should look like the below screenshot.



Lab Goal

Lab 5.0 Complete the Dashboard

In this lab you will complete the dashboard with a spotlight ranking for actionable incidents.

- Add a report to an analytics dashboard
- Style a report into a ranking.
- Apply the breakdown functionality to reports

Add an Incident Spotlight Report

1. Navigate to Performance Analytics -> Dashboards in the left navigation. Find your Continual Service Improvement dashboard.

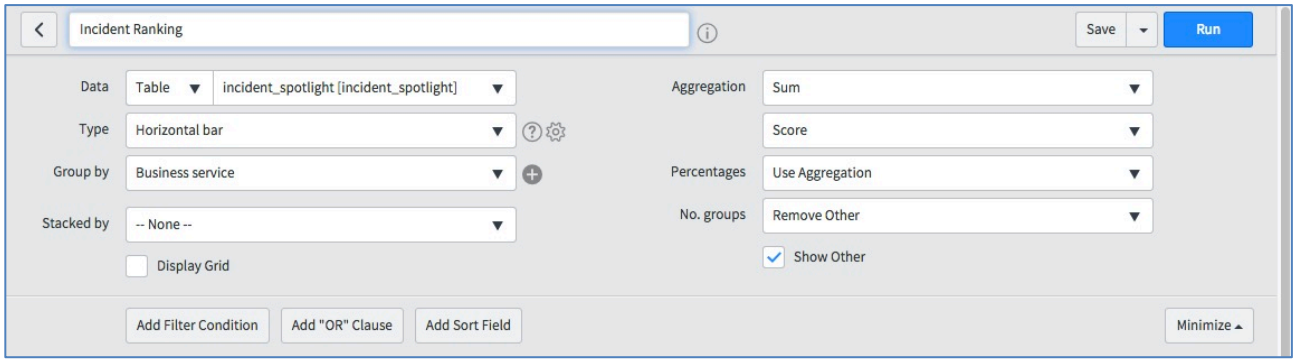
2. Ensure the **+** is selected in the upper right.

3. In the right flyout, choose **Reports**. Find **#New Report** and click the blue **Add** button.

4. In the dashboard widget just added (not in the right flyout pane), click the link **Click Here**.

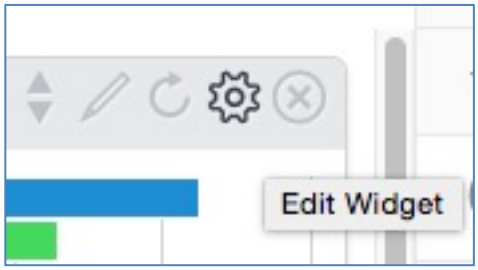
5. Create a report with the following parameters.

   Title: **Incident Ranking**
   Table: **Incident_Spotlight**
   Type: **Horizontal Bar**
   Group by: **Business Service**
   Aggregation: **Sum - Score**
   No. Groups**: Remove Other**

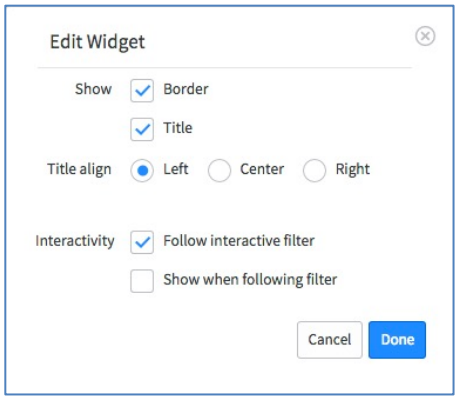


6. **Save** the report and navigate back to the **Continual Service Improvement Dashboard.**

7. In the upper-right of the **Incident Ranking** widget, click the gear.

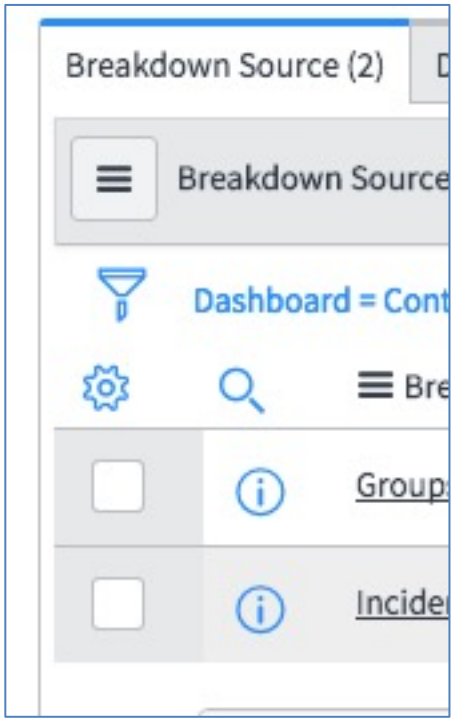


8. In the popup that appears, ensure **Follow Interactive Filter** is true, then click done.



Modify the Breakdown Source Filter

1. Click the three bars in the upper-left to open the context menu, choose **Dashboard Properties.**
2. Navigate to the **Breakdown Source** related list, and click the reference icon for the **Groups.**



3. Populate **Act as Filter** with **Spotlight Assignment Group,** then **Save** the record.

4. Click the down arrow in the upper-right to navigate to the other breakdown source attached to the dashboard.

5. Populate **Act as Filter** with **Spotlight Category,** then click **Update**.

6. Navigate back to the **Continual Service Improvement** dashboard and format it to your preference.

Lab Verification

Your dashboard should look like this.



Lab Goal

In this challenge lab you will be tasked with applying styling to your dashboard to enhance the dashboard's adoption.

- Report Styling
- Widget styling

Challenge Lab
Apply Styling

Apply Dashboard Styling

1. Provide a scaling green styling to the report, the position of the title, and remove the border.
2. Add matching green colors to the analytics widgets, add a time picker, adjust the title, and remove the border.

