Lab Guide

Performance Analytics 301:

Visualizing Hierarchical Data

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Default Login / Password: Knowledge17

admin / Knowledge17

itil / Knowledge17

employee / Knowledge17

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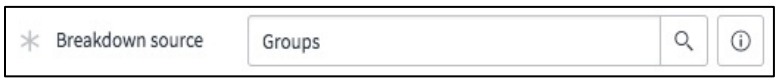
Lab Goal

This lab explains the technique of using a rollup script to roll up scores to parent breakdown elements.

Lab 1.1 Breakdown Rollups

Create "Assignment Group with Rollup" Breakdown

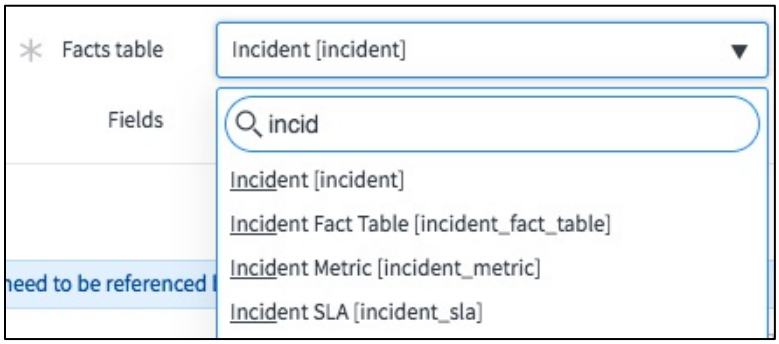
1. Navigate to **Performance Analytics > Breakdowns > Automated Breakdowns**.
2. Click **New**.
3. Set the name to **Assignment Group with Rollup**.
4. Choose the **Groups** Breakdown Source.



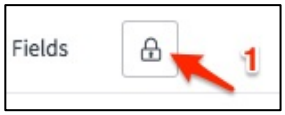
5. **Submit** the form.

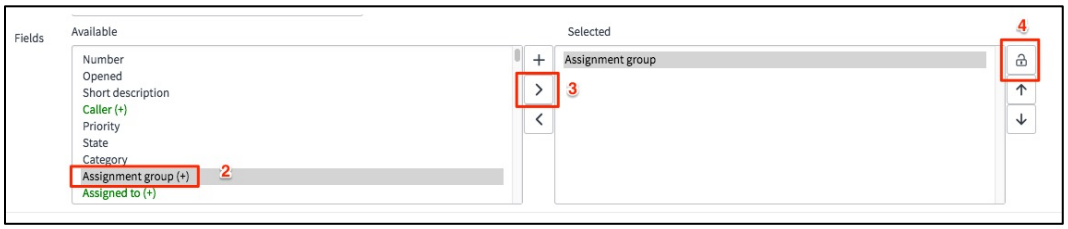
Create a Rollup Script

1. Navigate to **Performance Analytics > Automation > Scripts**.
2. Click **New**.
3. Set the name to **Incident.Assignment Group.Rollup**.
4. Select the **Incident [incident]** Facts table.



5. Choose the **Assignment Group** Field.





6. Fill in the script field with the following code:

```
var groups = [];
var group = current.assignment_group;
while (group) {
  groups.push(group);
  var gr = new GlideRecord('sys_user_group');
  gr.get(group);
  group = gr.getValue('parent');
}
groups;
```

7. **Submit** the form.

Use the Rollup Script in a Breakdown Mapping

1. Navigate to **Performance Analytics > Breakdowns > Automated Breakdowns**.
2. Open the **Assignment Group with Rollup** breakdown.
3. Scroll to the **Breakdown Mappings** related list.
4. Click **New**.
5. Choose the **Incident [incident]** Facts table.



6. Check the **Scripted** box.

7. Select the **Incident.Assignment Group.Rollup** Script.

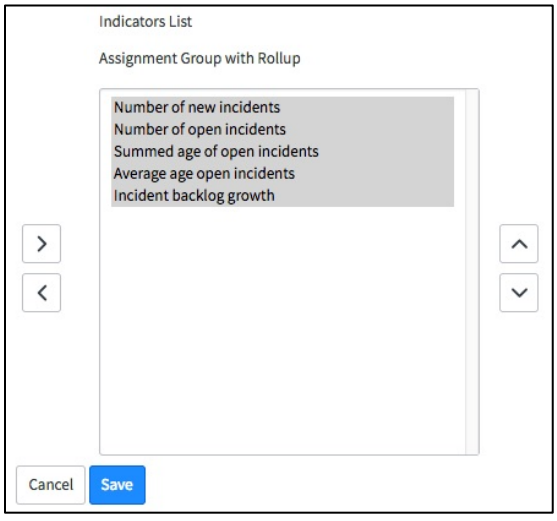


8. **Submit** the form.

Associate Breakdown to Indicators

1. Navigate to **Performance Analytics > Breakdowns > Automated Breakdowns**.
2. Open the **Assignment Group with Rollup** breakdown.
3. Scroll down and click the **Indicators** related list.
4. Click **Edit**.
5. Add the following **Indicators** to the list:

   Number of new incidents
   Number of open incidents
   Summed age of open incidents
   Average age open incidents
   Incident backlog growth



6. Click **Save**.

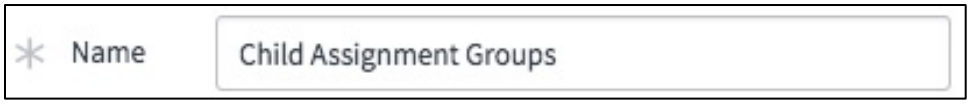
Lab Goal

This lab explains how to create breakdown relations to easily navigate between related breakdown elements in a data hierarchy.

Lab 2.1 Breakdown Relations

Create a Child Breakdown Relation

1. Navigate to **Performance Analytics > Breakdowns > Breakdown Relations**.
2. Click **New**.
3. Enter the name **Child Assignment Groups**.



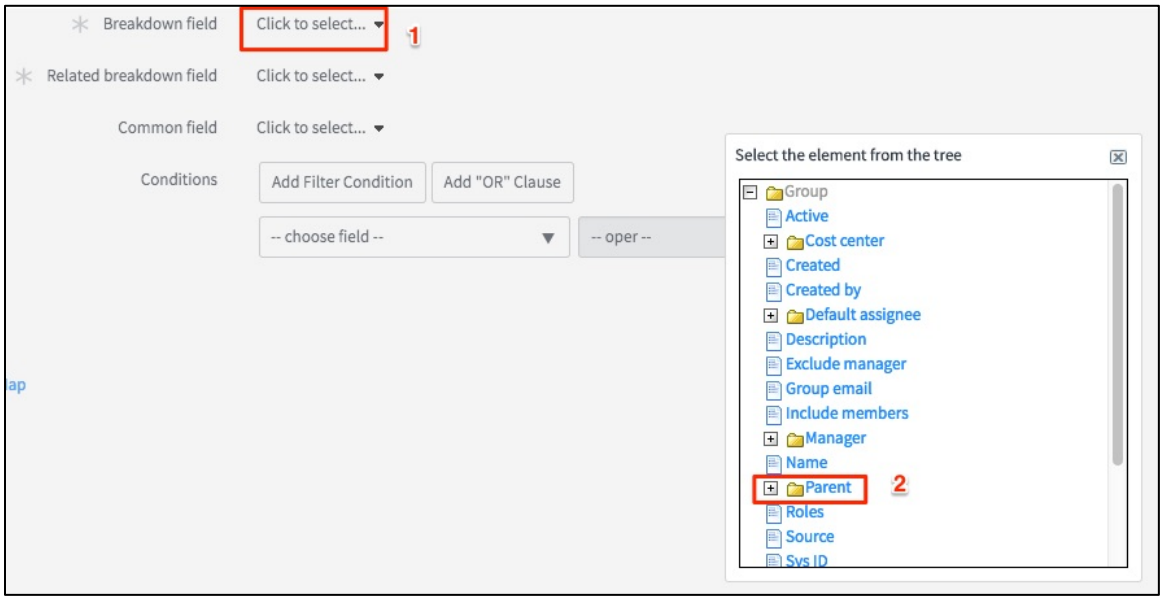
4. Choose the **Assignment Group** Breakdown.
5. Again choose **Assignment Group** for the Related Breakdown field.



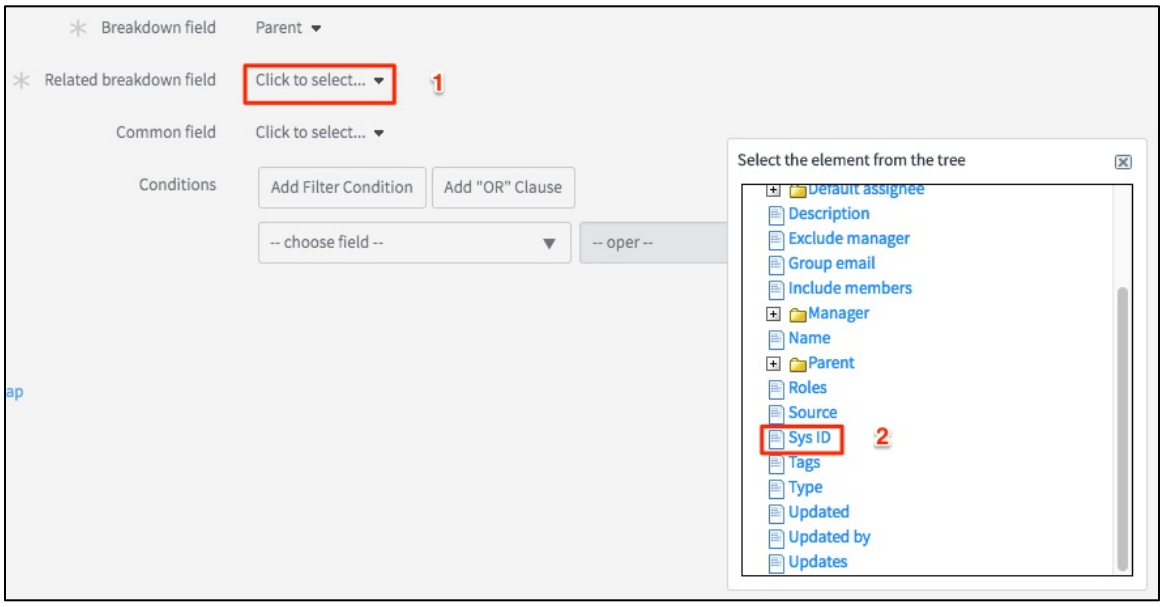
6. Select the **Group [sys_user_group]** Table.



7. Select the **Parent** Breakdown field.



8. Select the **Sys ID** Related breakdown field.



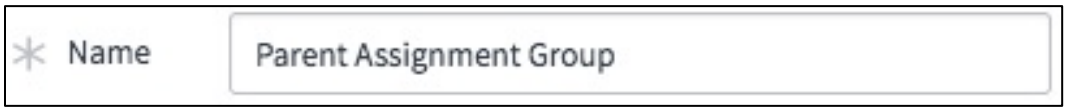
9. Create the following Conditions **Active – is – true**.



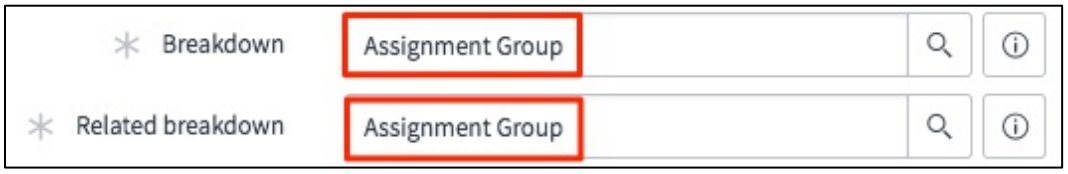
10. Set **Order** to 1.
11. **Submit** the form.

Create a Parent Breakdown Relation

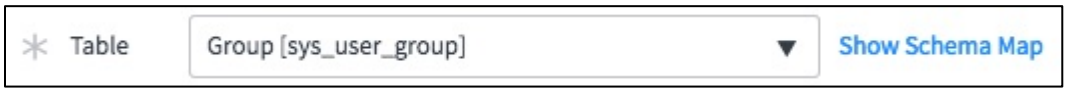
1. Navigate to **Performance Analytics > Breakdowns > Breakdown Relations**.
2. Click **New**.
3. Enter the name **Parent Assignment Group**.



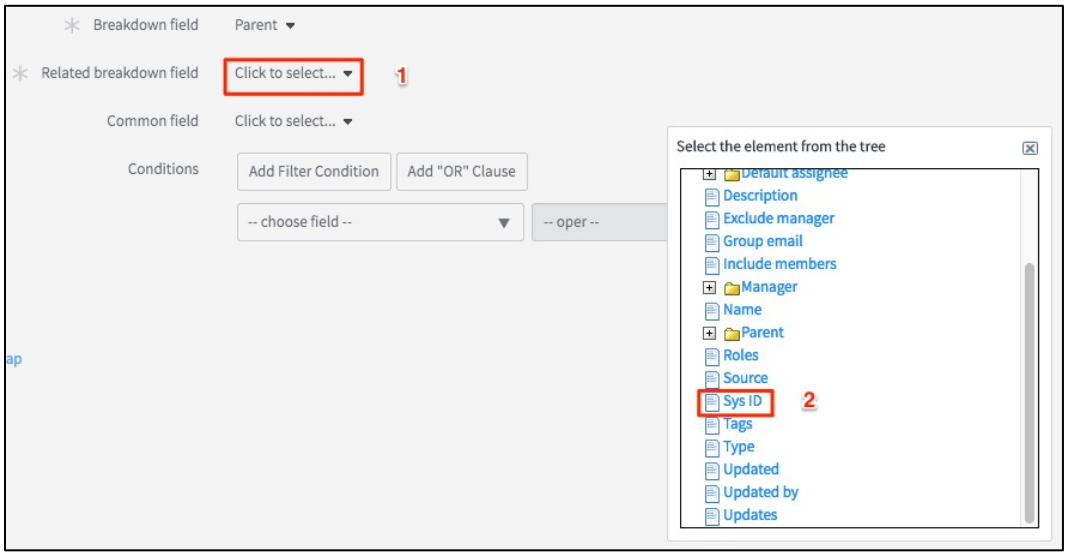
4. Choose the **Assignment Group** Breakdown.
5. Again choose **Assignment Group** for the Related Breakdown field.



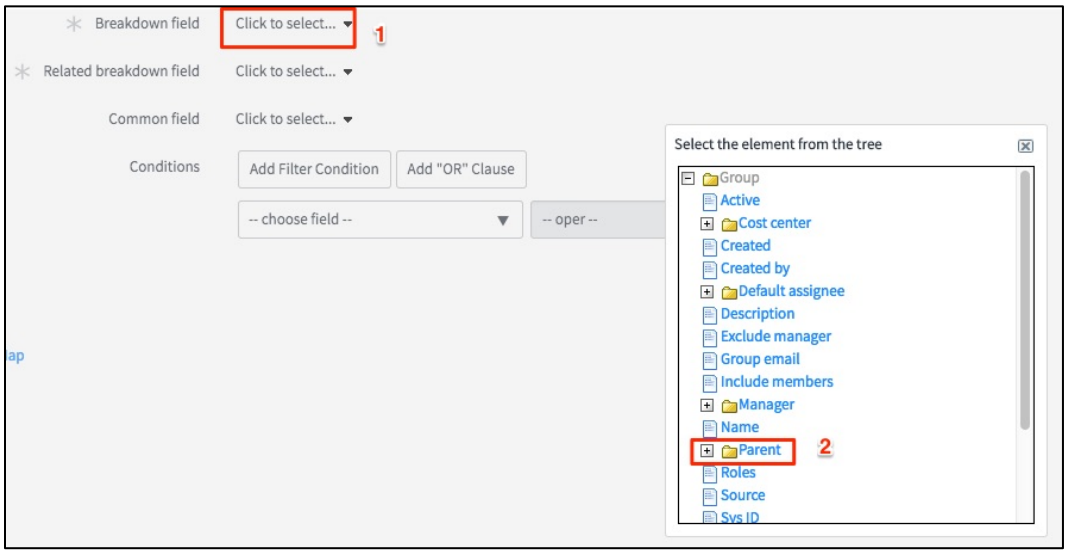
6. Select the **Group [sys_user_group]** Table.



7. Select the **Sys ID** Breakdown field.



8. Select the **Parent** Related breakdown field.



9. Create the following Conditions **Active – is – true**.



10. Set **Order** to 2.

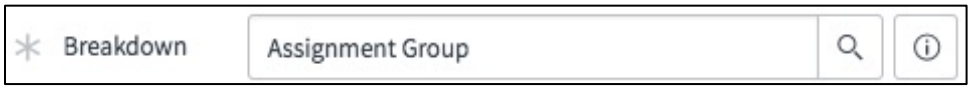
11. **Submit** the form.

Create a Breakdown Relation Between Two Different Breakdowns

1. Navigate to **Performance Analytics > Breakdowns > Breakdown Relations**.
2. Click **New**.
3. Enter the name **Group Members**.



4. Choose the **Assignment Group** Breakdown.



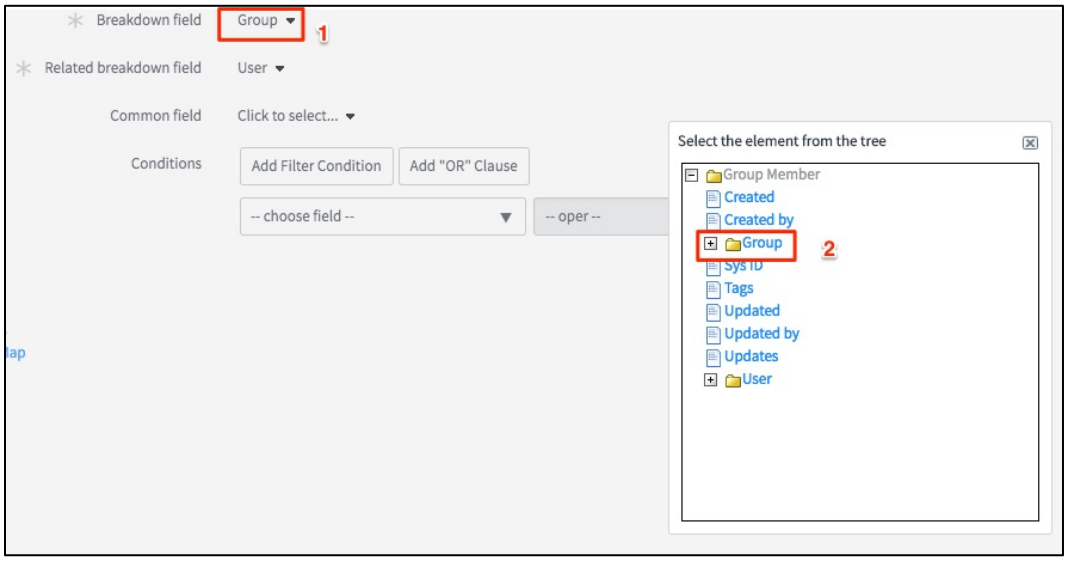
5. Choose **Assigned To** for the Related Breakdown.



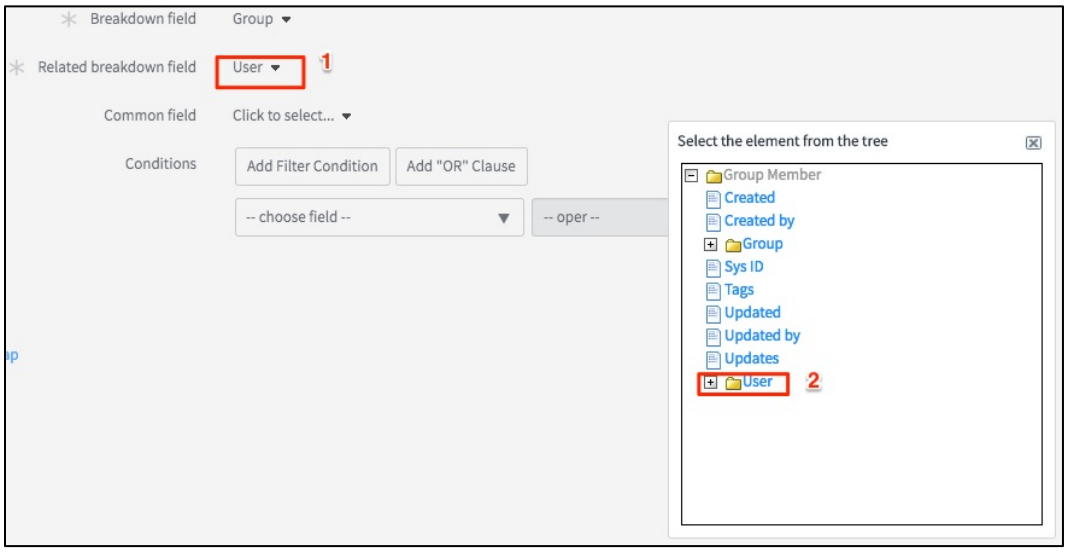
6. Select the **Group Member [sys_user_grpmember]** Table.



7. Select the **Group** Breakdown field.



8. Select the **User** Related breakdown field.



9. **Submit** the form.

Lab Goal

This lab explains how to create breakdown exclusions, and how they can help reduce the number of scores collected during a data collection.

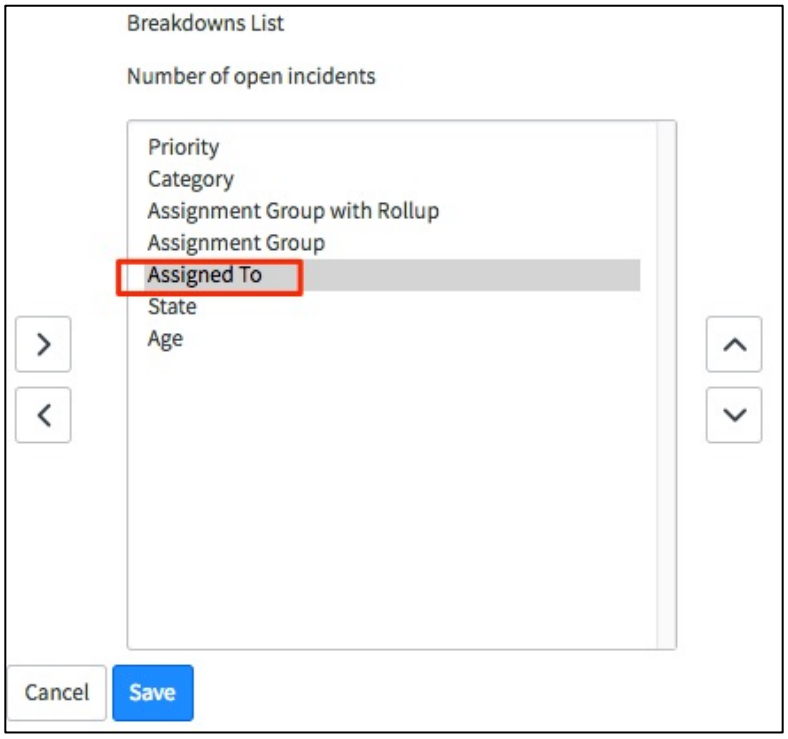
Lab 3.1
Breakdown Exclusions

Associate Breakdown to Indicator

1. Navigate to **Performance Analytics > Indicators > Automated Indicators**.
2. Open the **Number of open incidents** indicator.
3. Scroll down and click the **Breakdowns** related list.
4. Click **Edit**.

5. Add the following **Breakdown** to the list:

   Assigned To

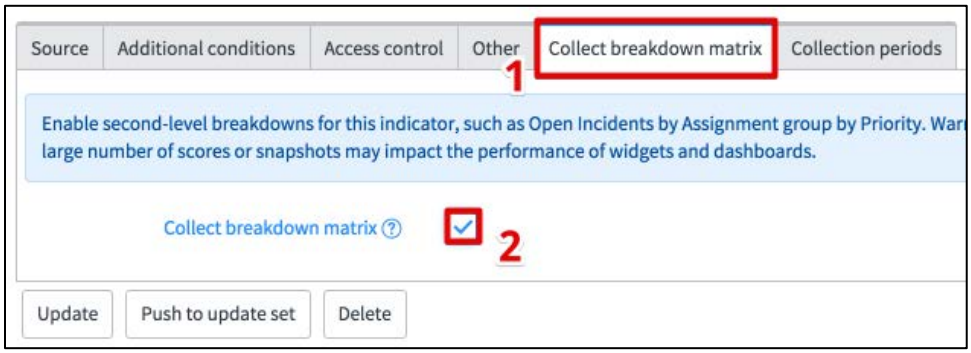


6. Click **Save**.

Enable the Breakdown Matrix

1. Navigate to **Performance Analytics > Indicators > Automated Indicators**.
2. Open the **Number of open incidents** indicator.
3. Click the **Collect breakdown matrix** form tab.

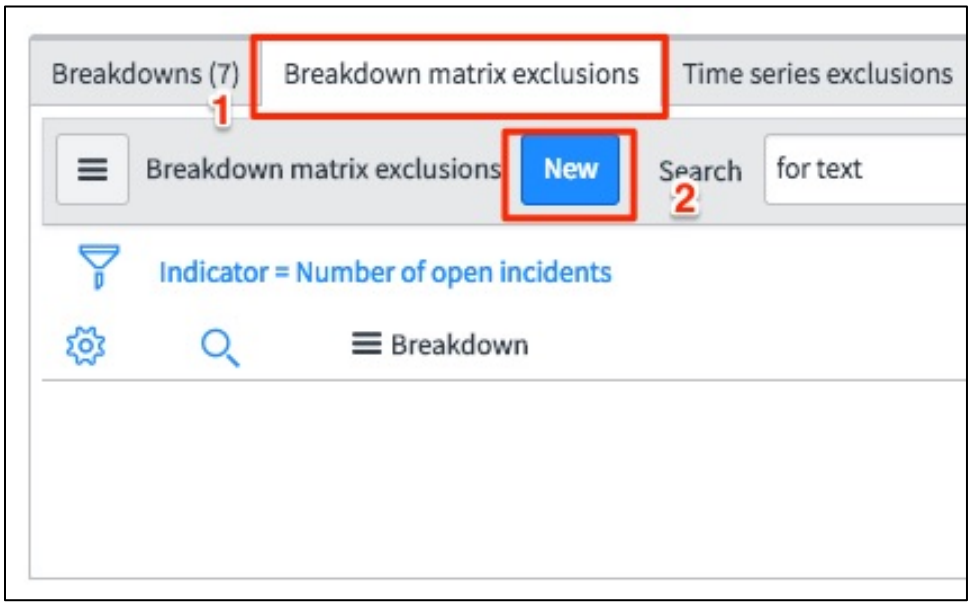
4. Check **Collect breakdown matrix**.



5. **Save** the form.

Create a Breakdown Exclusion

1. Scroll to and click the **Breakdown matrix exclusions** related list.
2. Click **New**.



3. Choose the **Assignment Group** Breakdown.



4. Choose the **Assigned To** 2nd Breakdown.



5. **Submit** the form.

Lab Goal

This lab explains how to collect historical data and verify the breakdown rollup and breakdown relations have been set up correctly.

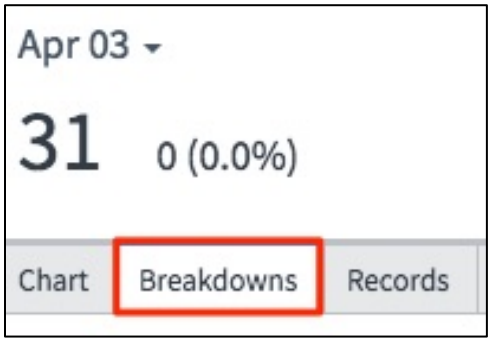
Lab 4.1 Data Collection

Run the Data Collector Job

1. Navigate to **Performance Analytics > Data Collector > Jobs**.
2. Open the **[PA Incident] Historic Data Collection** Scheduled Data Collection.
3. Click **Execute Now**.

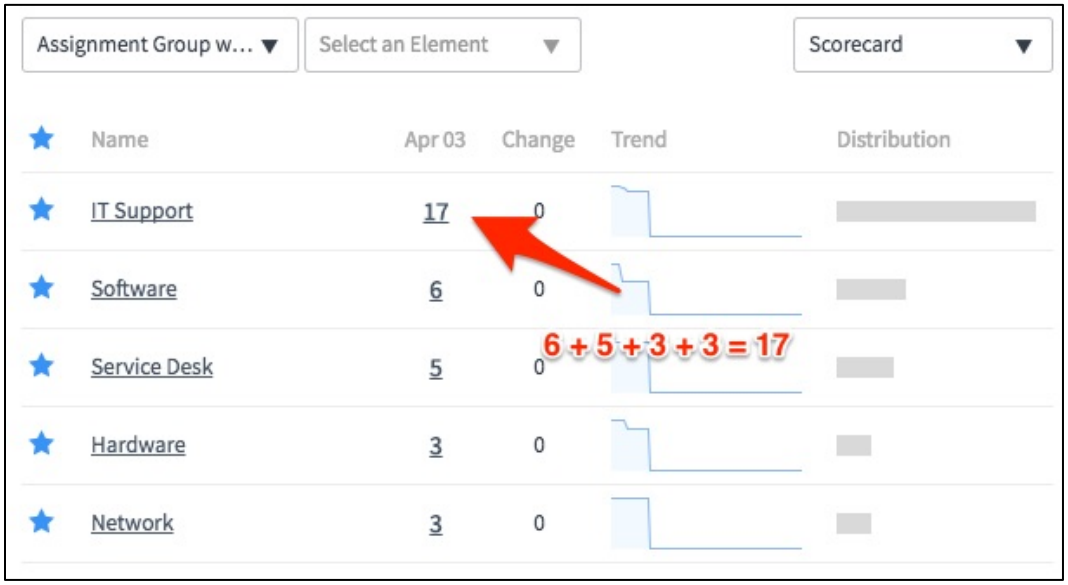
Verify Assignment Group Breakdown Rollup

1. Navigate to **Performance Analytics > Scorecards**.
2. Open the **Number of open incidents** scorecard.
3. Click the **Breakdowns** tab.



4. Select the **Assignment Group with Rollup** breakdown.

5. Verify that the Assignment Group elements have correctly been attributed the sum of their child Assignment Group elements. Score values may differ based on demo data.



Verify Breakdown Relations

1. Navigate to **Performance Analytics > Scorecards**.
2. Open the **Number of open incidents** scorecard.
3. Click the **Breakdowns** tab.
4. Select the **Assignment Group** breakdown from the breakdown select box.
5. Open the **Software** breakdown.



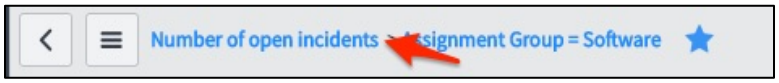
6. Click the **Breakdowns** tab again.
7. Open the breakdowns select box.
8. Confirm that the three **Breakdown Relations** created in Lab 2 are available:

   Child Assignment Groups
   Parent Assignment Group
   Group Members

9. Click **Group Members**.
10. Confirm that the breakdowns displayed are:

    ITIL User
    Beth Anglin
    Don Goodliffe
    Fred Luddy
    David Loo

11. Navigate back to the main indicator



12. Open the breakdown select box.
13. Click **Assignment Group**.
14. Open the **IT Support** breakdown



15. Open the breakdown select box.
16. Click **Child Assignment Groups**.
17. Confirm that the breakdowns displayed are:

    Software
    Service Desk
    Hardware
    Network
    Database

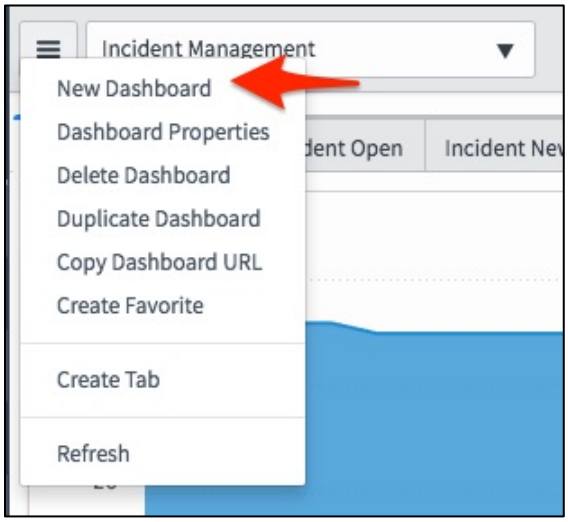
Lab Goal

Create a workbench widget to monitor the workload of the IT Support assignment groups and analyze how work is distributed amongst them.

Lab 5.1 Workbench Widgets

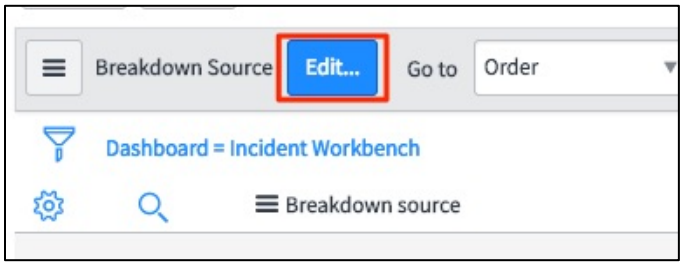
Create a Breakdown Dashboard

1. Navigate to **Performance Analytics > Dashboards**.
2. Click the  menu symbol to the left of the dashboard picker.

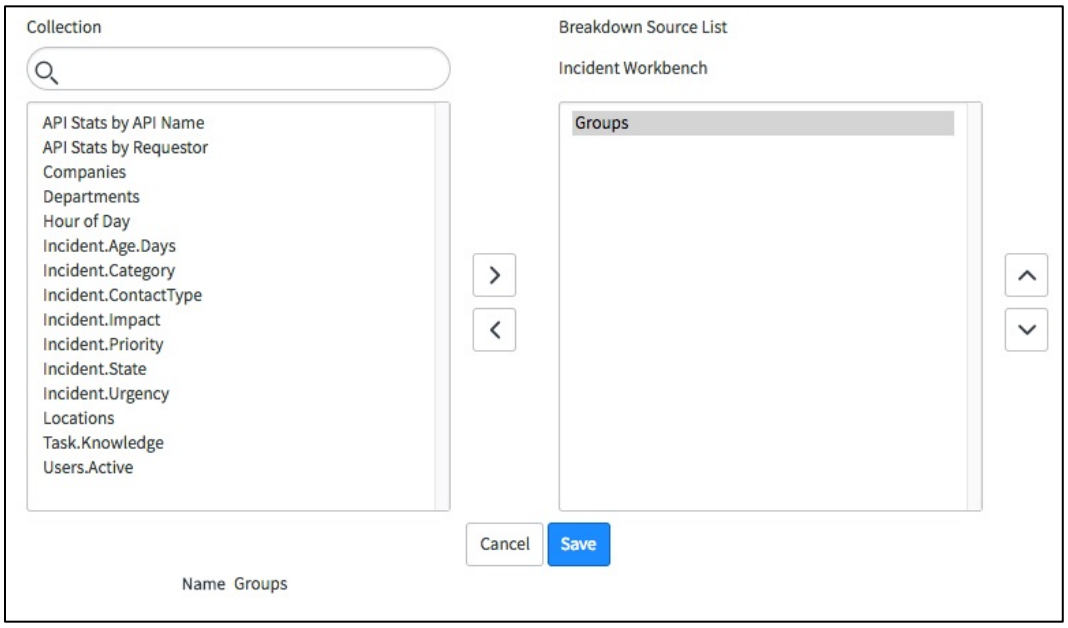


3. Set the name to **Incident Workbench**.
4. Choose the **Incident** Group.
5. Set the Order to **2**.
6. Right-click the form header and **Save**.

7. Click **Edit** on the **Breakdown Source** related list.



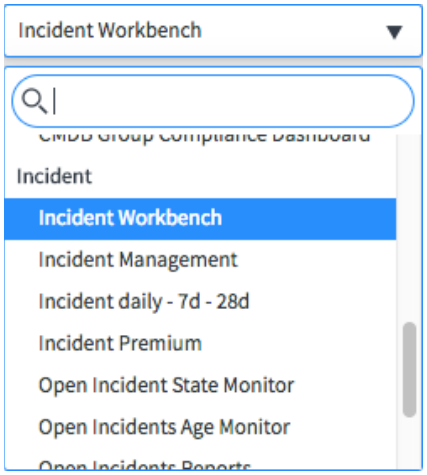
8. Add the **Groups** breakdown source.



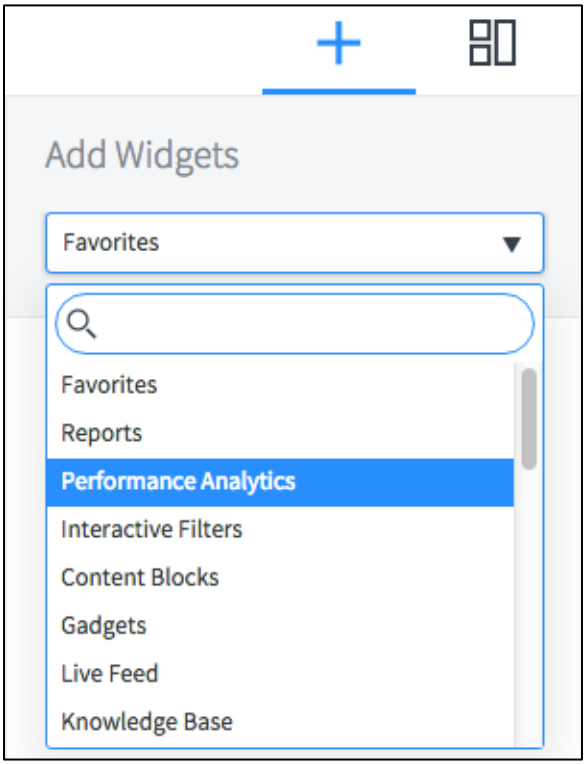
9. Click **Save**.

Create an Incident Workbench Widget

1. Navigate to Performance Analytics > Dashboards.
2. Choose the **Incident Workbench** dashboard.



3. Select **Performance Analytics** from the **Add Widgets** content drop-down list.



4. Click **Workbench**.



5. Click **#New Workbench**.



6. Click **Add**.
7. In the new widget stub, click **Click here** to configure the new widget.

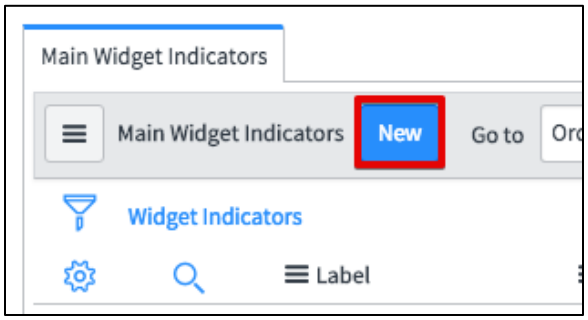


8. Set the name to **Incident Workbench**.
9. Right-click on the form header and **Save** the form.

Add a Main Widget Indicator

1. Scroll to the **Main Widget Indicators** related list.

2. Click **New**.



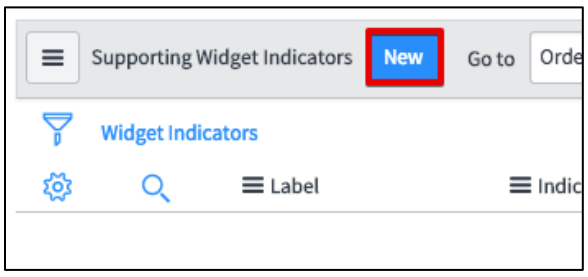
3. Choose the **Number of open incidents** Indicator.
4. Choose the **Assignment Group with Rollup** Breakdown.
5. Choose the Element **IT Support**.



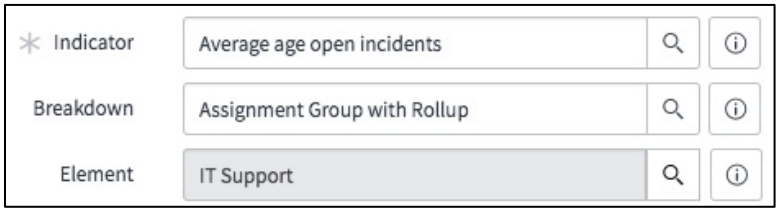
6. Check **Follow element**.
7. Set the Order to **10**.
8. Set the Label to **IT Support**.
9. Right-click on the form header and **Save** the form.

Add Supporting Widget Indicators

1. Scroll to the **Supporting Widget Indicators** related list.
2. Click **New**.



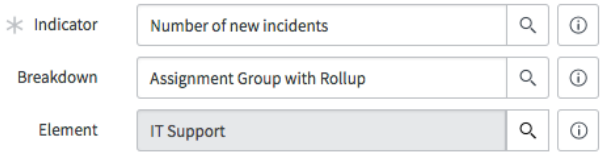
3. Choose the **Average age open incidents** indicator.
4. Choose the **Assignment Group with Rollup** Breakdown.
5. Choose the Element **IT Support**.



6. Check **Follow element**.
7. Set the Order to **10**.
8. Set the Label to **Age of Open**.
9. Right-click on the form header and **Save** the form.

Add Another Supporting Widget Indicator

1. Change the Indicator to **Number of new incidents**.
2. Choose the **Assignment Group with Rollup** Breakdown.
3. Choose the Element **IT Support**.



4. Check **Follow element**.
5. Set the Order to **20**.
6. Set the Label to **New Incidents**.
7. Right-click the form header.
8. Click **Insert**.

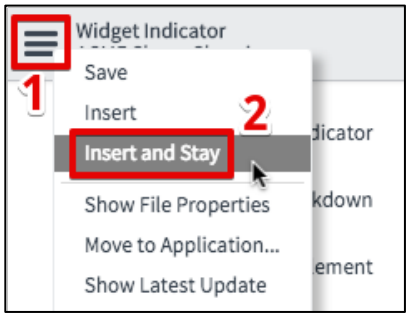
Add the Remaining IT Support Assignment Group Elements as Main Widget Indicators

1. The **Number of open incidents** Main Indicator form should display. If not, open **Incident Workbench** widget and then navigate to the **Number of open incidents** Main Indicator from the related list.

2. Change the Element to **Hardware**.

3. Open the form context menu.

4. Click **Insert and Stay**.



5. Follow the steps in the **Add Supporting Widget Indicators** and **Add Another Supporting Indicator** sections, this time choosing the **Hardware** Element.

6. Repeat this section for each of the following group elements:

   Software
   Database
   Network

   Each time use the same **Assignment Group with Rollup** breakdown element for the Main Widget Indicator and Supporting Widget Indicators.

Progress Report

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

2. Click **I am done!**

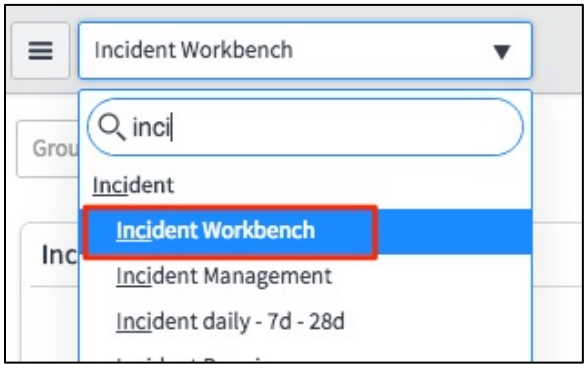
Lab Goal

This lab explains how to create report drill downs to navigate through a data hierarchy.

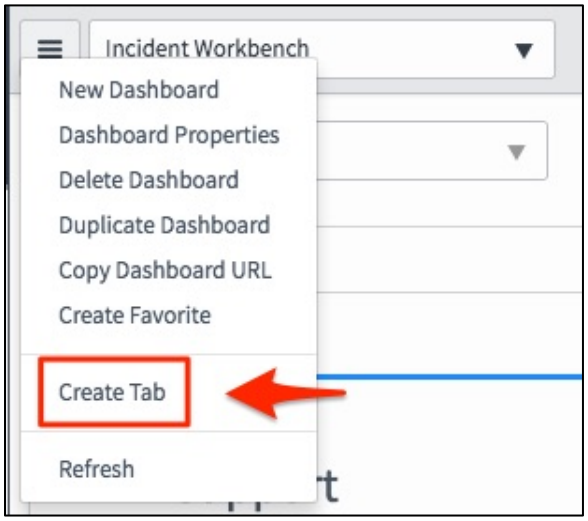
Lab 6.1
Report
Drilldown

Create the Base Report

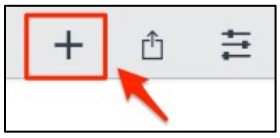
1. Navigate to **Performance Analytics > Dashboards**.
2. Select the **Incident Workbench** dashboard.



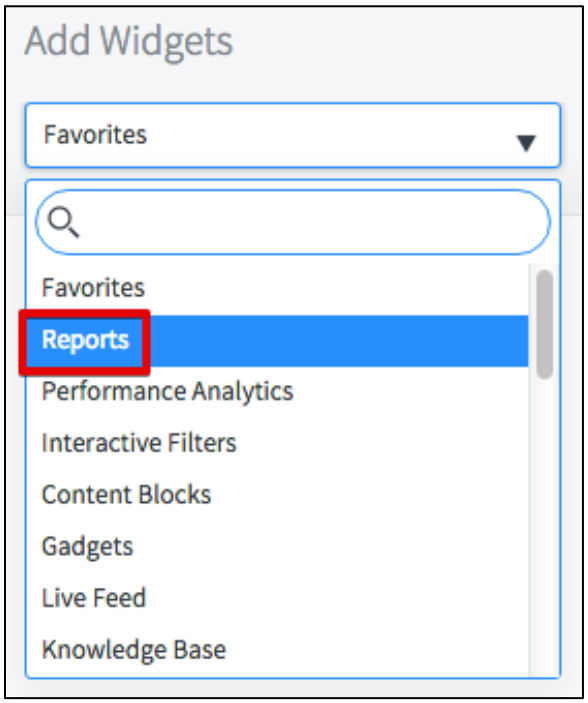
3. Click the menu icon and click **Create Tab**



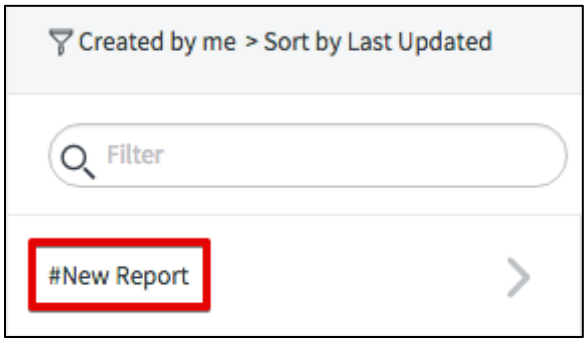
4. Click the plus sign to switch into Edit mode.



5. Select **Reports** from the **Add Widgets** content drop- down list.

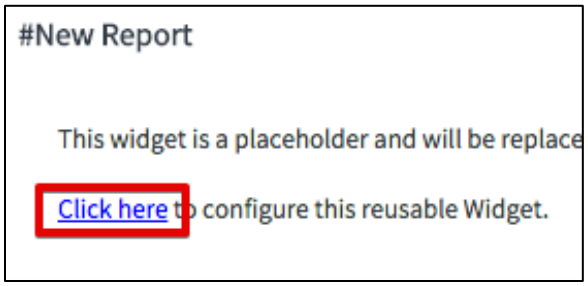


6. Click **#New Report**.



7. Click **Add**.

8. In the new widget stub, click **Click here** to configure the new widget.



9. Set the report title to **Open Incidents**.
10. Choose the **Incident [incident]** Table.
11. Select **Horizontal bar** as the Type.
12. Group the data by **Assignment group**.



13. Add the following **Filter**:

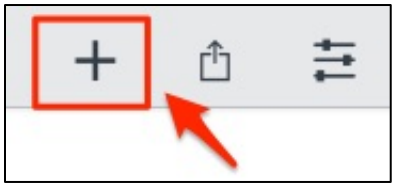
Closed – is empty
or
Closed – after – Today



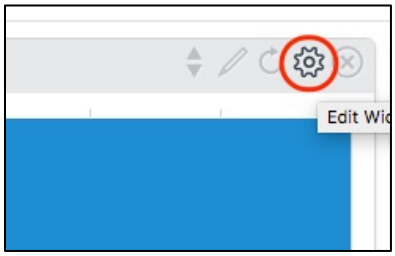
14. Click **Save**.

Configure Report to Follow Interactive Filters

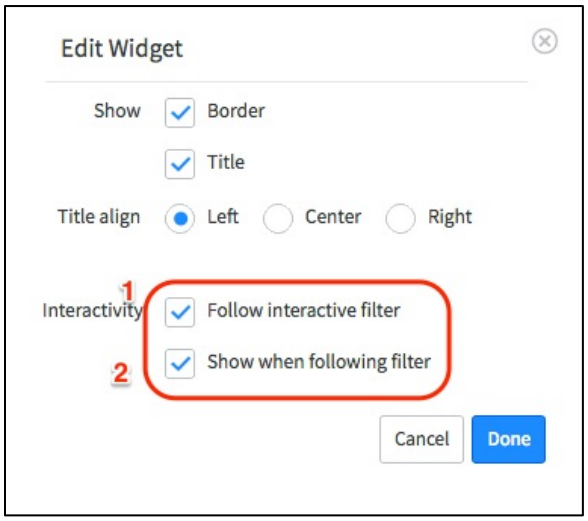
1. Navigate to **Performance Analytics > Dashboards**.
2. Open the **Incident Workbench** dashboard.
3. Click the **+** symbol to open the **Add Widgets** pane.



4. Click the gear icon in the top right corner of the report widget you added.



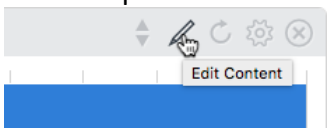
5. Check the box for **Follow interactive filter** and **Show when following filter**.



6. Click **Done**.

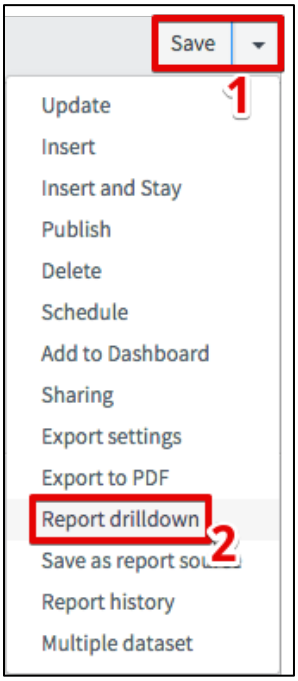
Drilldown to Open Incidents by Assignee

1. Click the pencil icon in the top right corner of the report widget you added.



2. Open the **report context menu**.

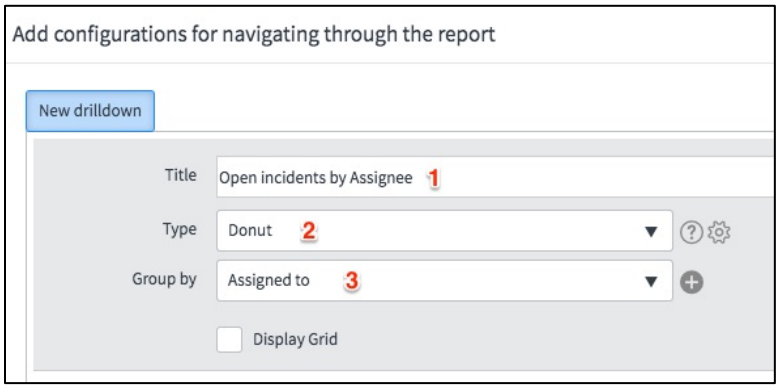
3. Click **Report drilldown**.



4. Set the Title to **Open Incidents by Assignee**.

5. Choose a type of **Donut**.

6. Group by **Assigned To**.



7. Click **Save**.

Drilldown to Open Cases by Location

1. Click the **New drilldown** tab.
2. Set the Title to **Open Incidents by Location**.
3. Choose a type of **Map**.
4. Select the **Incident by caller location** Map data.
5. Set the **United States of America**.



6. Click **Save**.

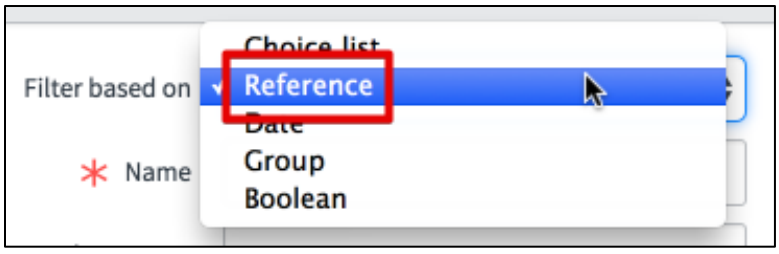
Lab Goal

Lab 7.1 Interactive Filters

Interactive filters are a great way to instantly see a different dimension of your data. When interpreting hierarchal data, interactive filters help you quickly filter out unwanted paths so you can spot hidden data relationships.

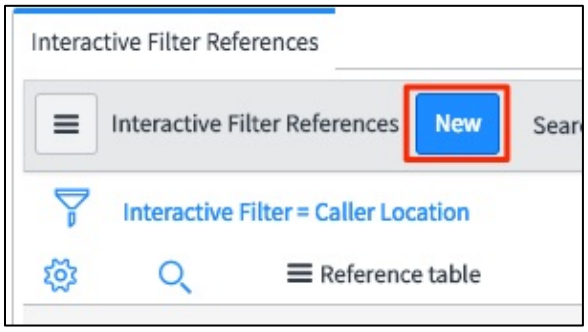
Create a New Interactive Filter

1. Navigate to **Reports > Administration > Interactive Filter**s.
2. Click **New**.
3. Choose the **Reference** option to Filter on.

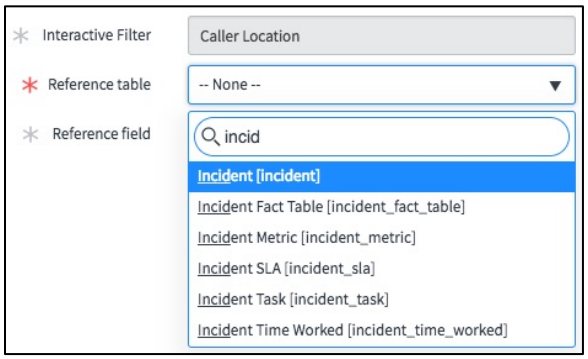


4. Name this filter **Caller Location**.
5. Select the **Location [cmn_location]** table.
6. Right-click on the form header and **Save** the form.
7. Scroll to the **Interactive Filter References** related list.

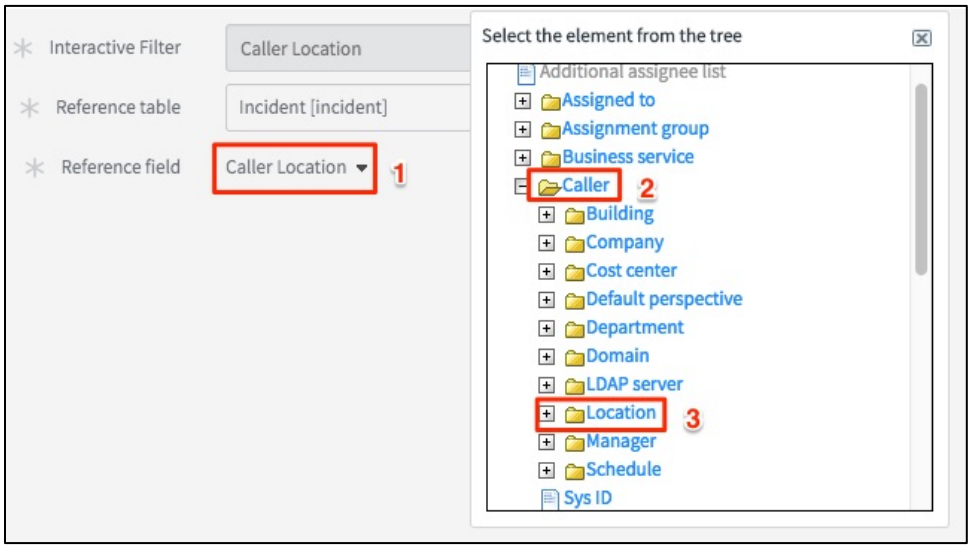
8. Click **New**.



9. Choose **Incident [incident]**.



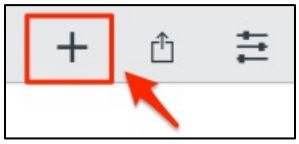
10. Choose the **Caller** then **Location** Reference field.



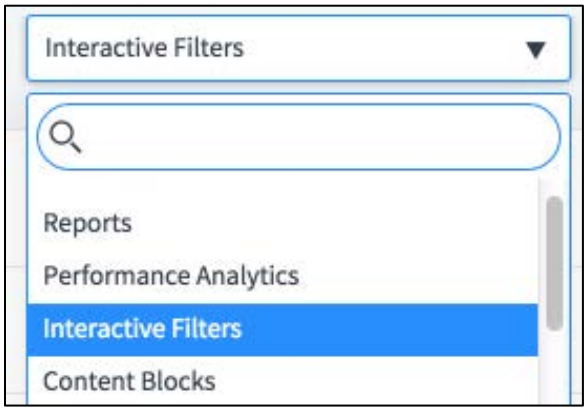
11. Click **Submit**.

Add the Caller Location Interactive Filter to the Incident Workbench Dashboard

1. Navigate to **Performance Analytics > Dashboards**.
2. Open the **Incident Workbench** dashboard.
3. Click the **+** symbol to open the **Add Widgets** pane.



4. Select **Interactive Filters** from the **Add Widgets** content drop-down list.



5. Choose **Reference**.

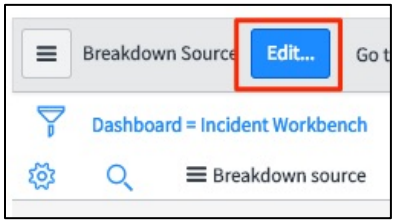


6. Click the **Caller Location** Interactive Filter.
7. Click **Add**.

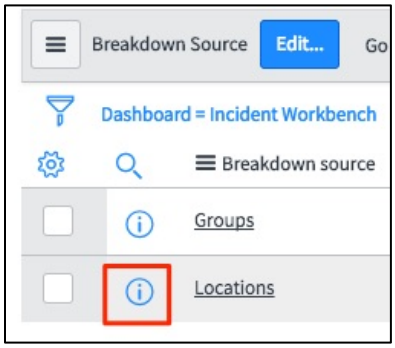
Configure the Caller Location Breakdown to Act as an Interactive Filter

1. Open the **Dashboard settings** menu.
2. Click **Modify**.

3. Scroll to the **Breakdown Source** related list.
4. Click **Edit** and add the Location breakdown.



5. Click the **Location** record



6. Choose the **Caller Location** interactive filter from the Act as filter field.



7. Click **Update**.
8. Close the dialogue.