knowledge14

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Lab Guide

Performance Analytics:

Getting Started

Olivier Baxa & Pieter Goris

Lab instance: https**://<<name>>**.lab.service-now.com

Login / Passwords:

admin / Knowledge14

itil / Knowledge14

employee / Knowledge14

Lab Goal

Verify the ServiceNow instance for the first collection:

- verify that Performance Analytics is activated,
- verify that queries for the indicators are accurate,
- verify that the queries for the breakdowns are accurate.

This requires the verification of settings for indicator sources, breakdown sources, bucket groups, scripts, breakdowns, and automated indicators.

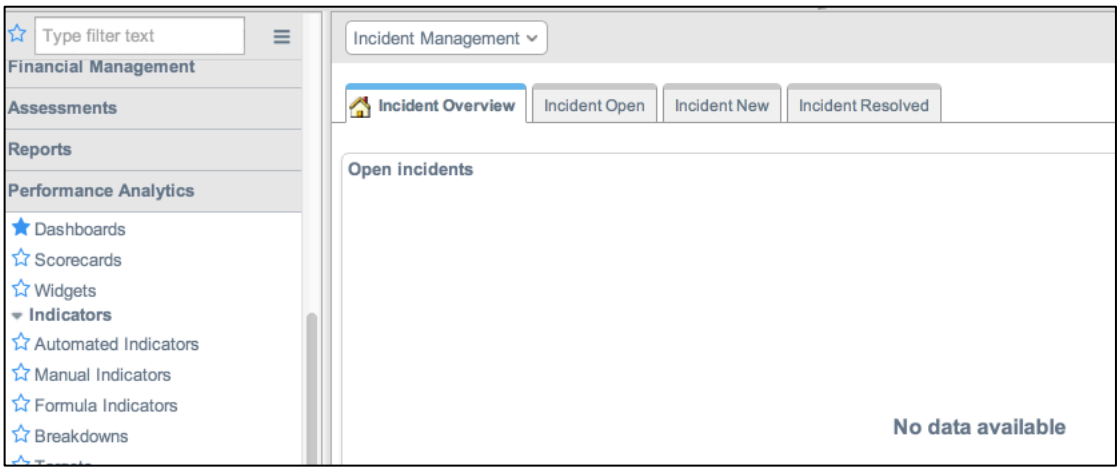
Lab 1
Verify Instance

Verify Activation of Performance Analytics Premium Edition.

1. Your instance URL is on the cover page.

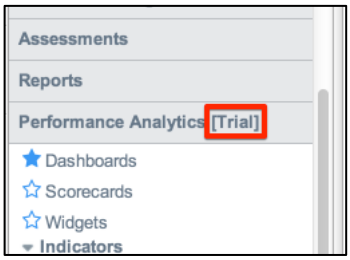
2. Login using the **admin** credentials provided on the cover.

3. Navigate to **Performance Analytics > Dashboards**. Your screen should look like:

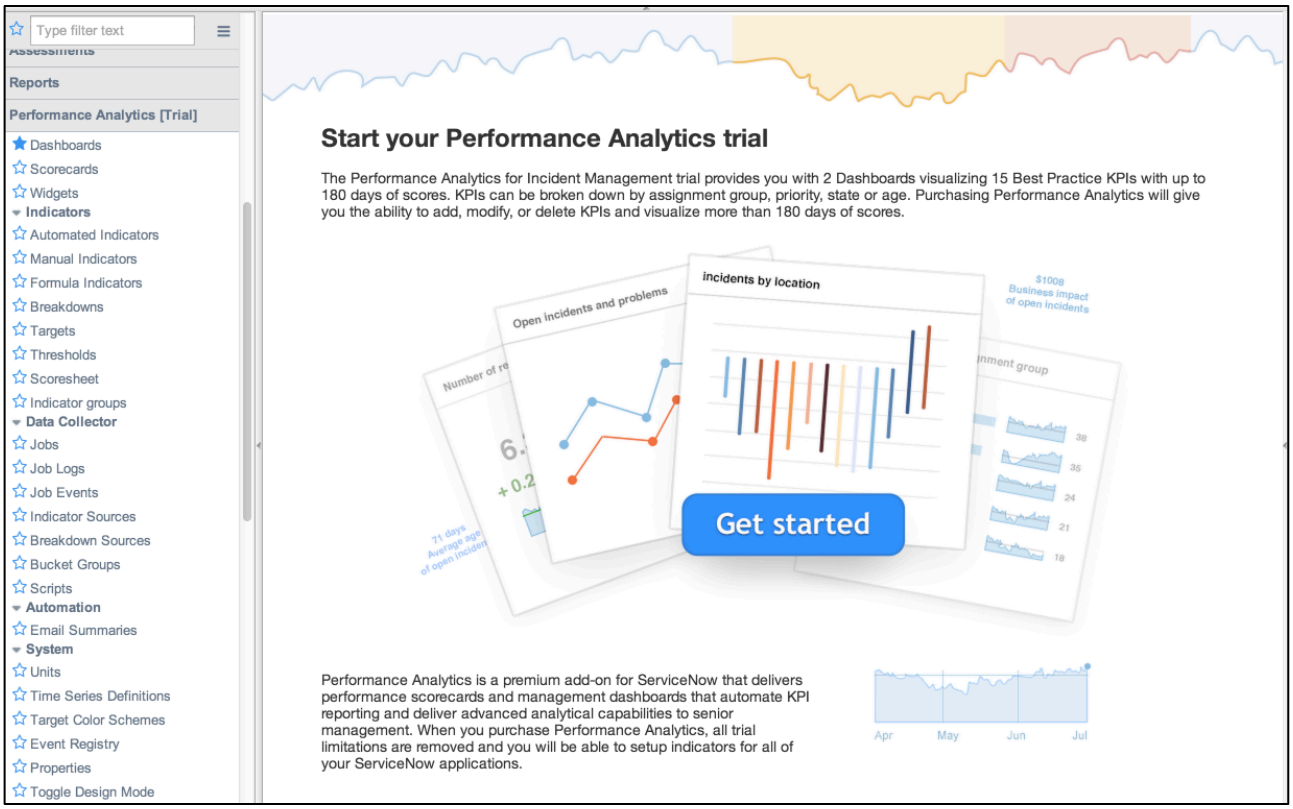


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NOTE: if the Trial Version is not unlocked to the Premium Edition the navigation pane looks like:



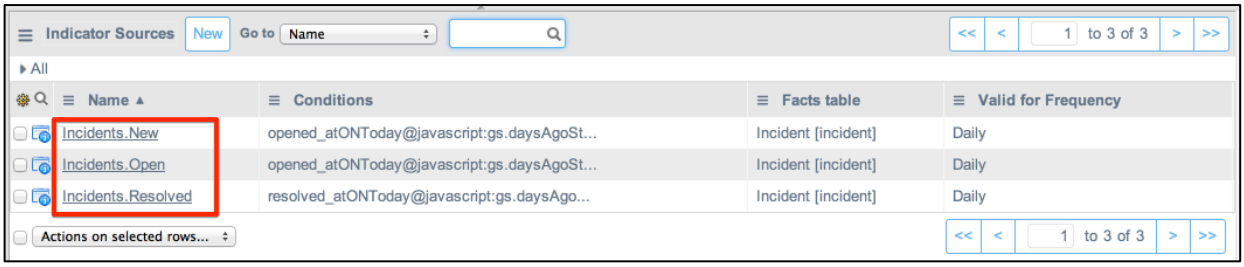
and navigating to the menu **Dashboards** or **Scorecards** shows the get started page:



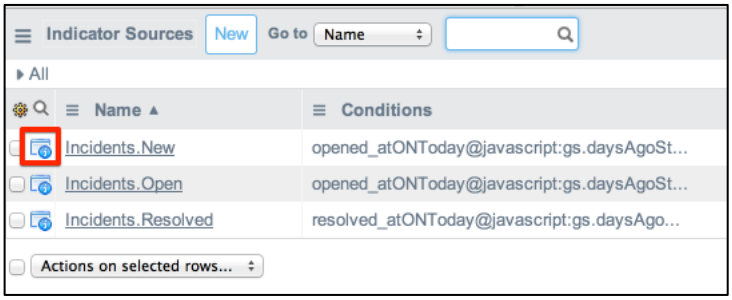
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Verify Settings for Indicator Sources.

1. Navigate to **Performance Analytics > Indicator Sources**. Verify that there are three indicator sources:

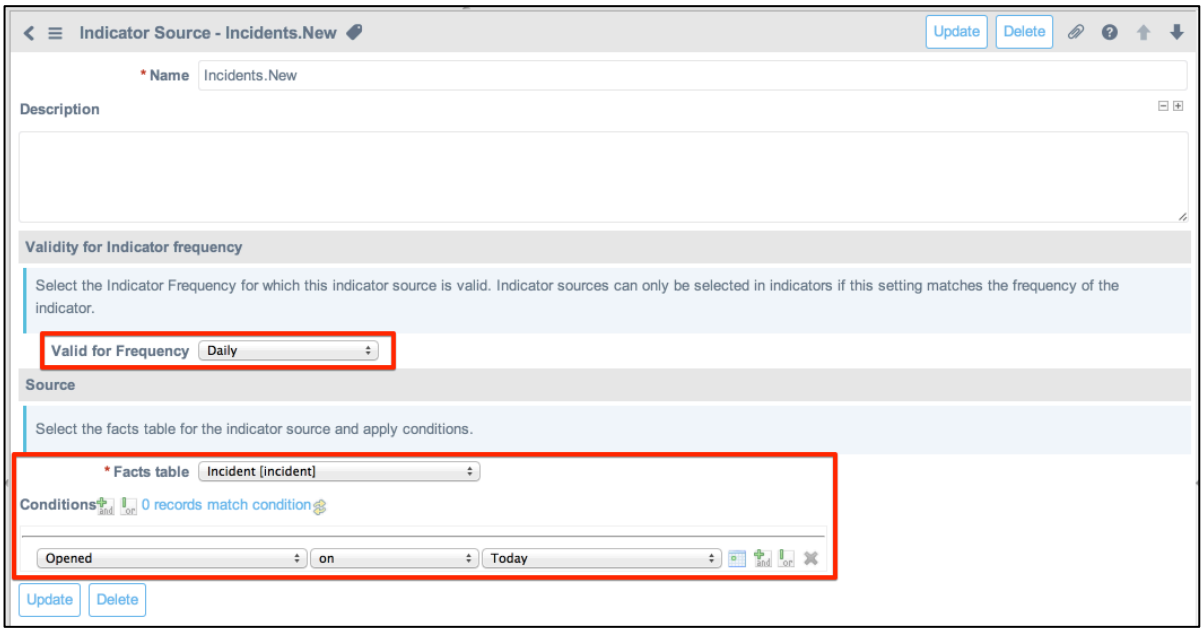


2. Open the first indicator source **Incidents.New** in edit mode, **click** on the icon in front of the name:



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3. Verify that
   - in the **Valid for indicator frequency** section the **Valid for Frequency** is set to **Daily**,
   - in the **Source** section the **Facts table** is set to **Incident [incident]**,
   - in the **Source** section the **Condition** is defined as **Opened on Today**.

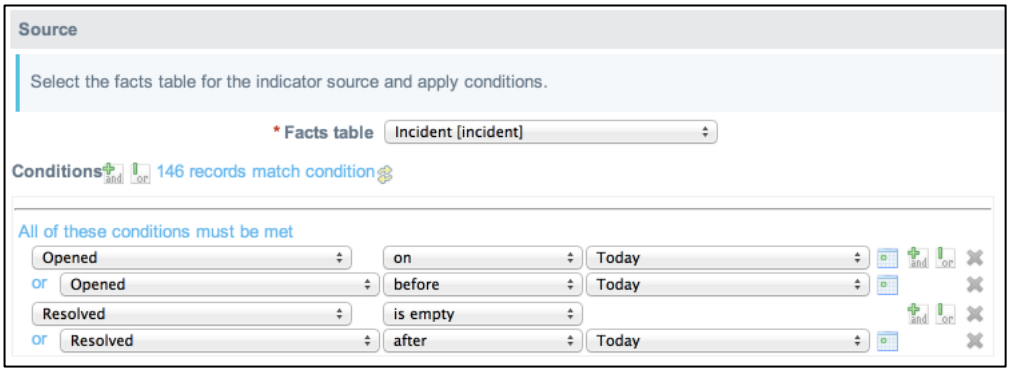


NOTE: if the values for the settings are different from the one described above, change the values and click the **Update** button.

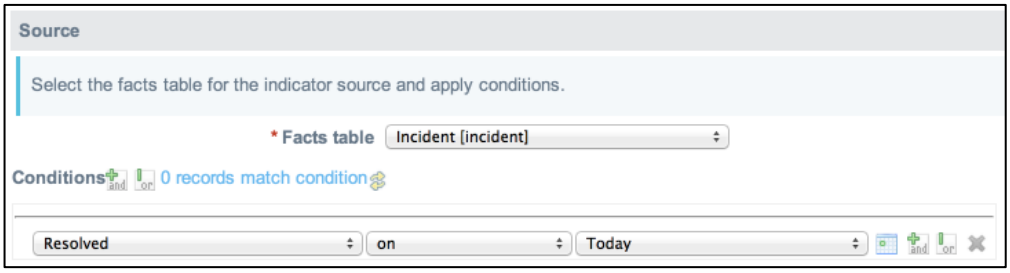
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4. Verify that for the other two indicator sources the settings are as follows.
   For Indicator Source **Incidents.Open**:
   - in the **Valid for indicator frequency** section the **Valid for Frequency** is set to **Daily**,
   - in the **Source** section the **Facts table** is set to **Incident [incident]**,
   - in the **Source** section the **Condition** is defined as

     Opened on Today
     OR **Opened Before Today**
     AND **Resolved is empty**
     OR **Resolved after Today**



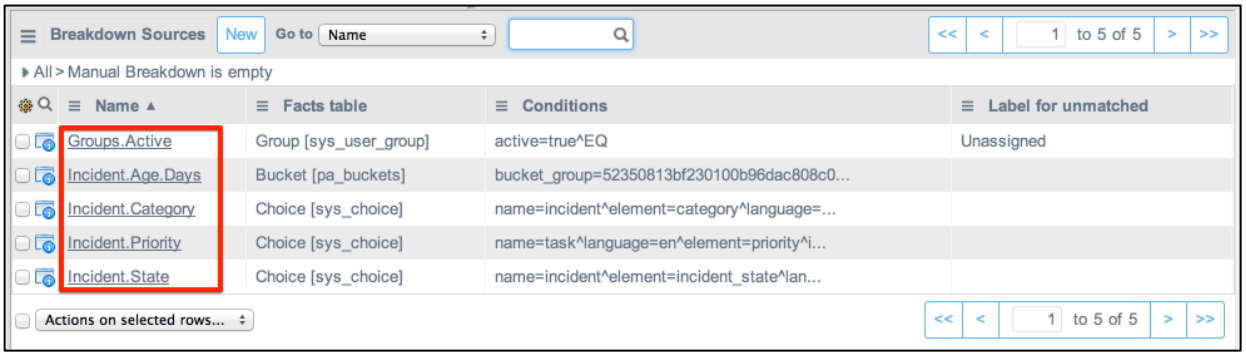
   For Indicator Source **Incidents.Resolved**:
   - in the **Valid for indicator frequency** section the **Valid for Frequency** is set to **Daily**,
   - in the **Source** section the **Facts table** is set to **Incident [incident]**,
   - in the **Source** section the **Condition** is defined as **Resolved on Today**



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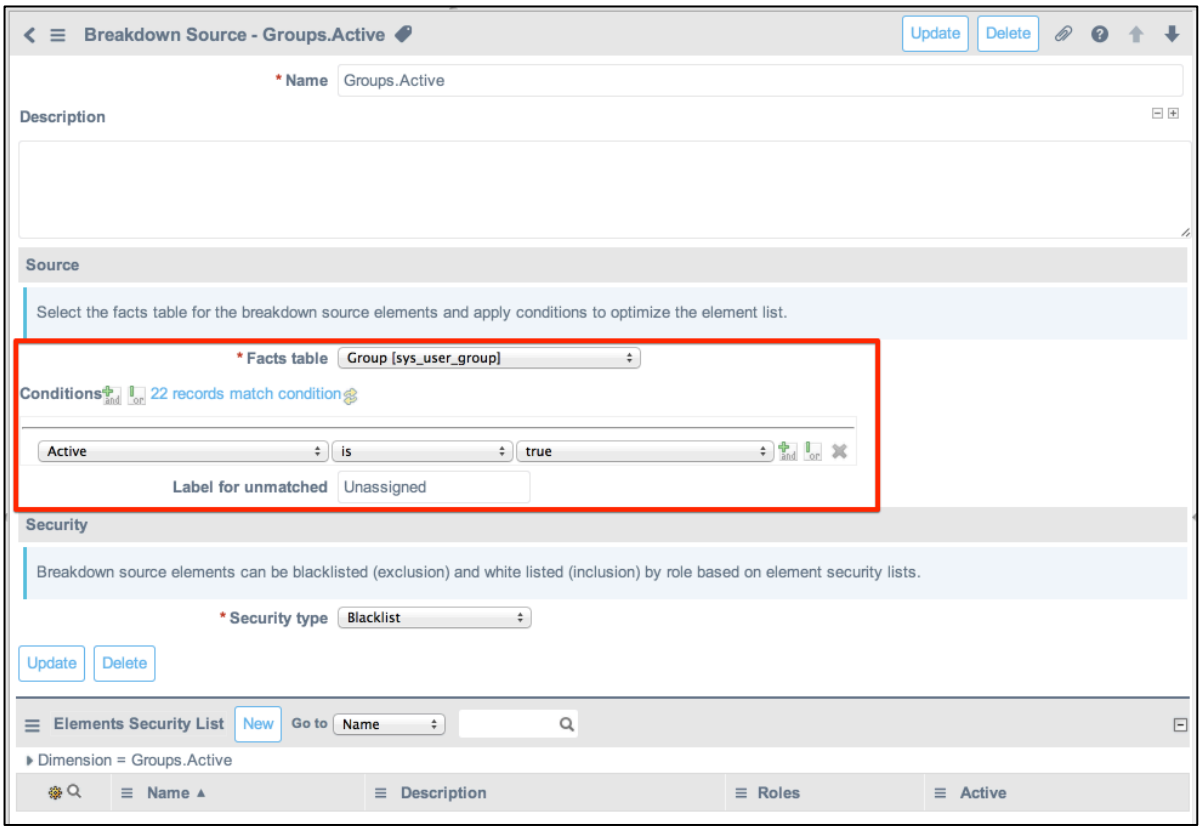
Verify Settings for Breakdown Sources.

1. Navigate to **Performance Analytics > Breakdown Sources**. Verify that there are five breakdown sources:



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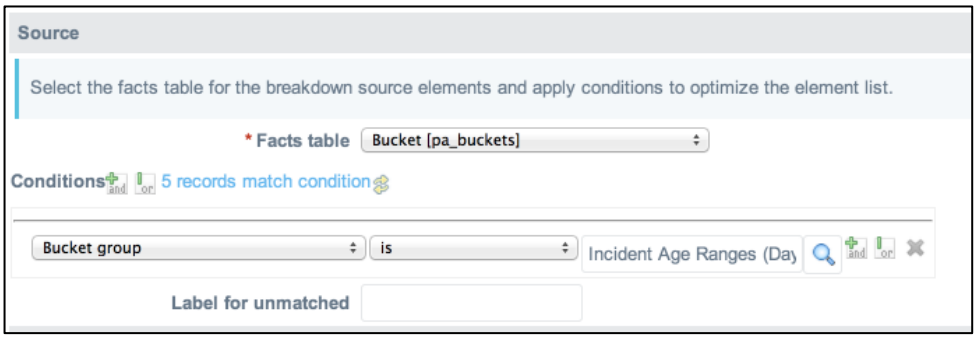
2. Open the first breakdown source **Groups.Active** in edit mode, and verify that in the **Source** section
   - the **Facts table** is set to **Group [sys_user_group]**,
   - the **Condition** is defined as **Active is true**.



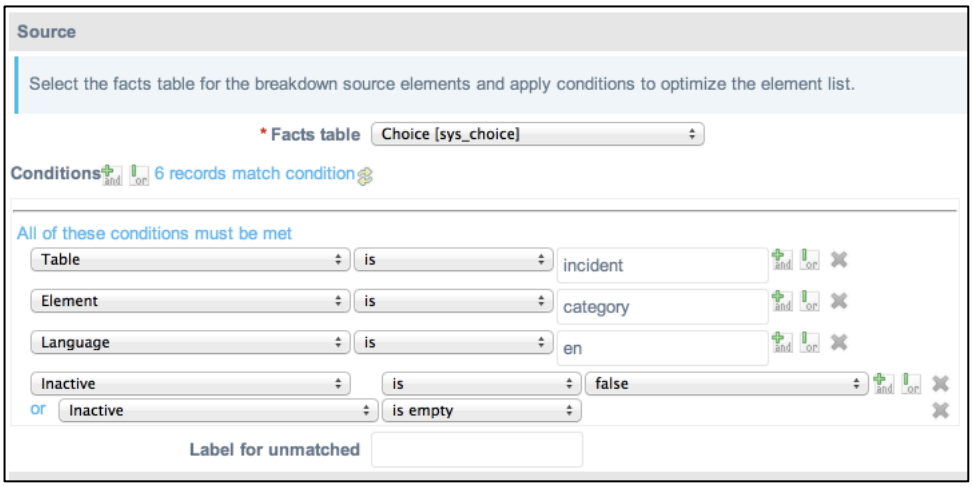
NOTE: if the values for the settings are different from the one described above, change the values and click the **Update** button.

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3. Verify that for the other four breakdown sources the settings are as follows.
   For Breakdown Source **Incident.Age.Days** in the section **Source**:
   - the **Facts table** is set to **Bucket [pa_buckets]**,
   - the **Condition** is defined as **Bucket group is Incident Age Ranges(Days)**



   For Breakdown Source **Incident.Category** in the section **Source**:
   - the **Facts table** is set to **Choice [sys_choice]**,
   - the **Condition** is defined as
     Table is incident
     AND **Element is category**
     AND **Language is en**
     AND **Inactive is false**
     OR **Inactive is empty**

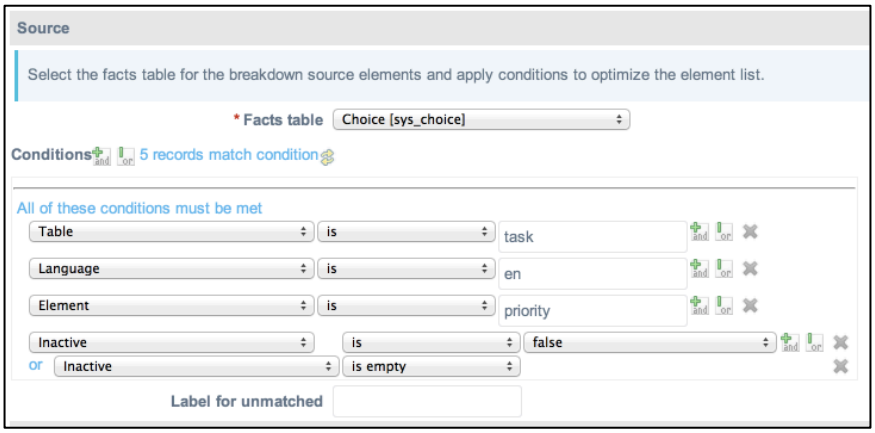


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For Breakdown Source **Incident.Priority** in the section **Source**:

- the **Facts table** is set to **Choice [sys_choice]**,
- the **Condition** is defined as

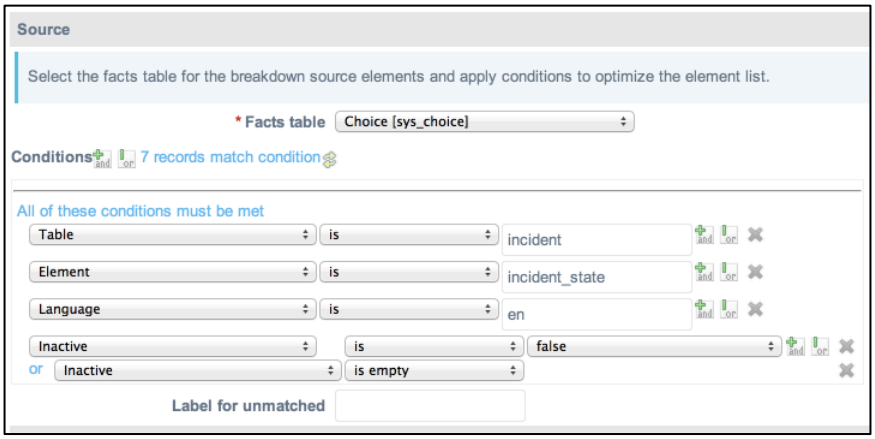
  Table is task
  AND **Language is en**
  AND **Element is priority**
  AND **Inactive is false**
  OR **Inactive is empty**



For Breakdown Source **Incident.State** in the section **Source**:

- the **Facts table** is set to **Choice [sys_choice]**,
- the **Condition** is defined as

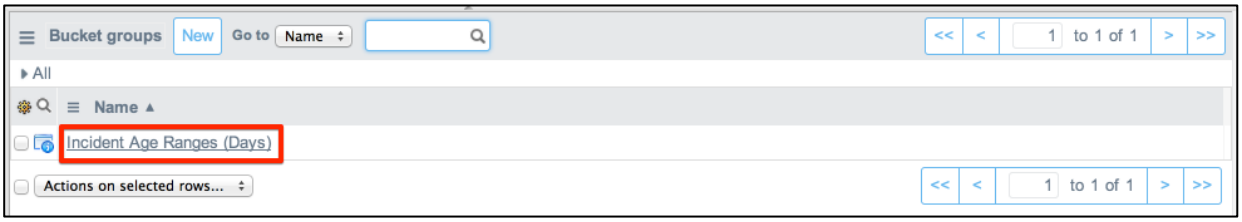
  Table is incident
  AND **Element is incident_state**
  AND **Language is en**
  AND **Inactive is false**
  OR **Inactive is empty**



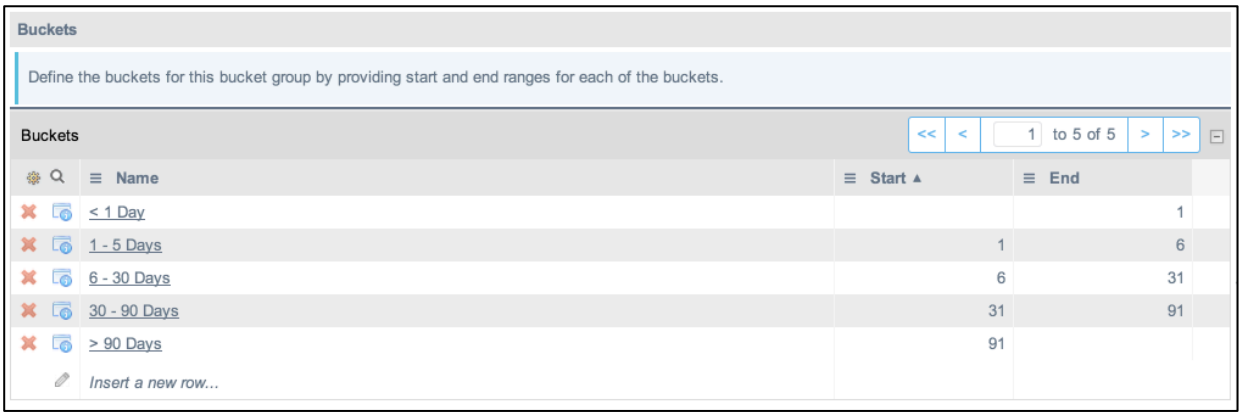
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Verify Settings of Bucket Groups.

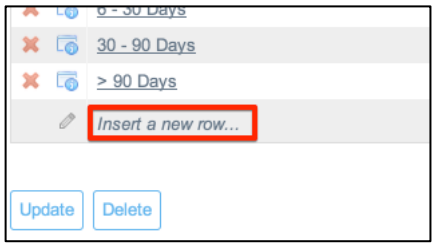
1. Navigate to **Performance Analytics > Bucket Groups**. Verify that there is one bucket group:



2. Open the bucket group **Age Ranges in Days** in edit mode, and verify that in the **Buckets** section there are five buckets defined like the ones shown in the screenshot below:



NOTE: if a bucket is missing, **double click** on the text **Insert a new row…** to the right of the pencil icon at the bottom, to add a new bucket:



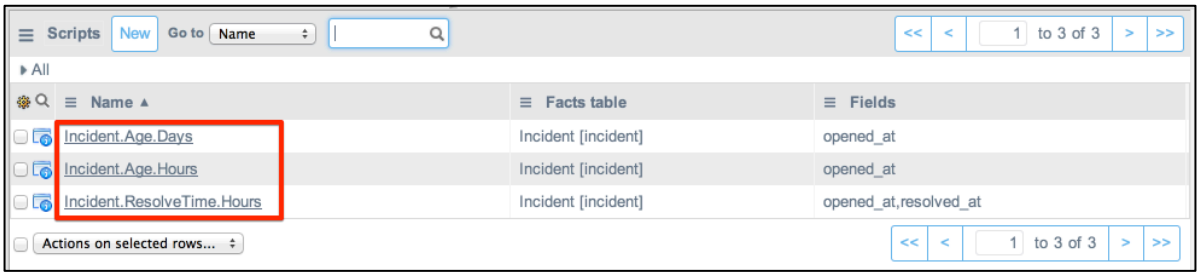
NOTE: if for an existing bucket the values for the setting of **Name**, **Start** and/or **End** need to be updated, click the icon in front of the name :



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Verify Settings of Scripts.

1. Navigate to **Performance Analytics > Scripts**. Verify that there are three scripts:
   - **Incident.Age.Days**
   - **Incident.Age.Hours**
   - **Incident.ResolveTime.Hours**



2. Open the script **Incident.Age.Days** in edit mode, and verify that in
   - the source section the **Facts table** is set to **Incident [incident]**,
   - the source section the **Field Opened** is selected,
   - the script section the script looks like in the screenshot below.

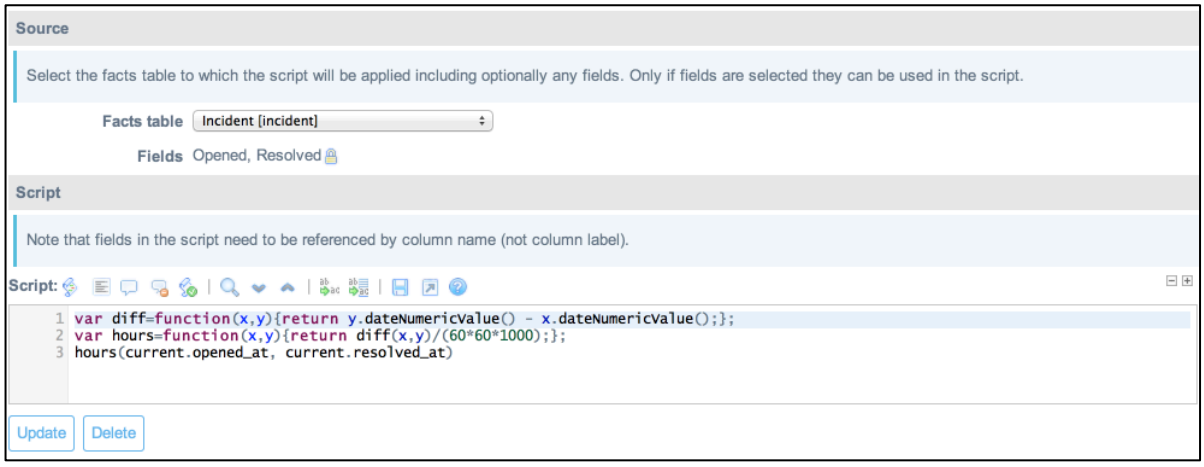


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3. Open the script **Incident.Age.Hours** in edit mode, and verify that in
   - the source section the **Facts table** is set to **Incident [incident]**,
   - the source section the **Field Opened** is selected,
   - the script section the script looks like in the screenshot below.



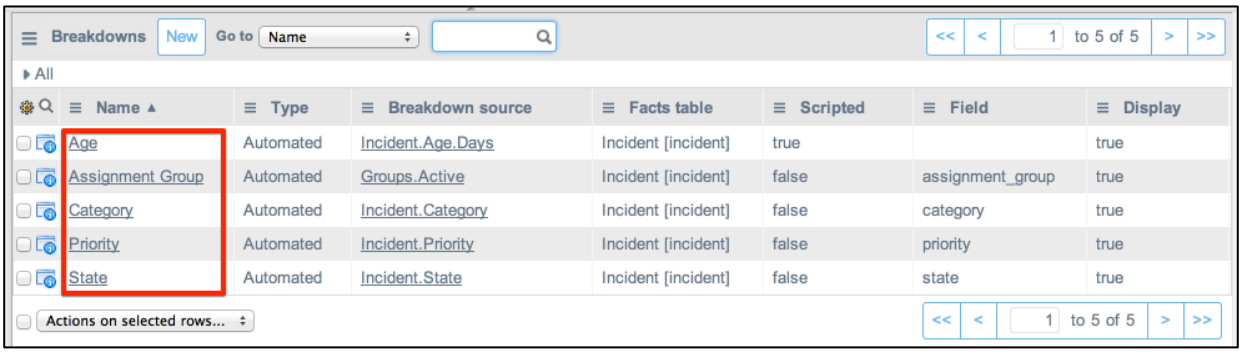
4. Open the script **Incident.ResolveTime.Hours** in edit mode, and verify that in
   - the source section the **Facts table** is set to **Incident [incident]**,
   - the source section the **Fields Opened** and **Resolved** are selected,
   - the script section the script looks like in the screenshot below.



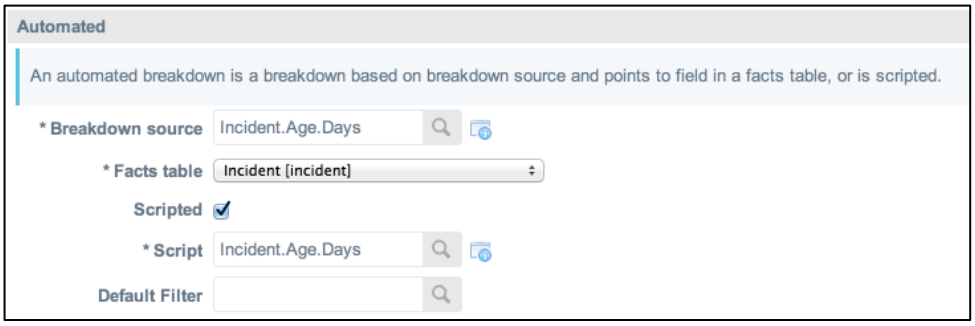
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Verify Settings of Breakdowns.

1. Navigate to **Performance Analytics > Breakdowns**. Verify that there are five breakdowns:



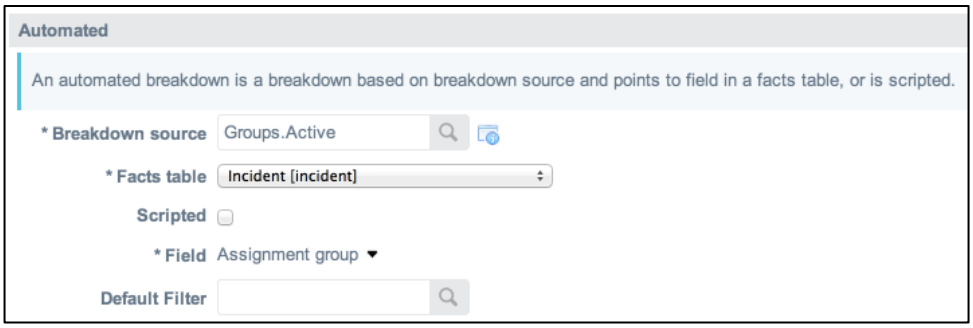
2. Open the first breakdown **Age** in edit mode. Verify that in the **Automated** section:
   - the **Breakdown source** is set to **Incident.Age.Days**,
   - the **Facts table** is set to **Incident [incident]**,
   - the **Scripted** checkbox is ticked,
   - the **Script** is set to **Incident.Age.Days**.



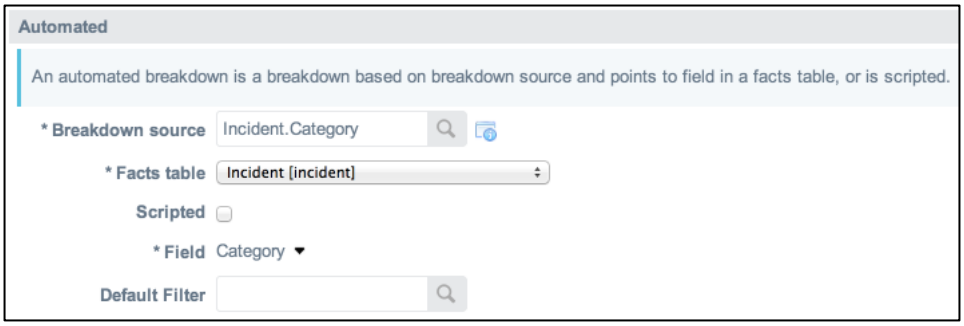
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3. Verify that for the other three breakdown sources the settings are as follows.

   For Breakdown **Assignment Group** in the section **Automated**:
   - the **Breakdown source** is set to **Groups.Active**,
   - the **Facts table** is set to **Incident [incident]**,
   - the **Scripted** checkbox is not ticked,
   - the **Field** is set to **Assignment group**.



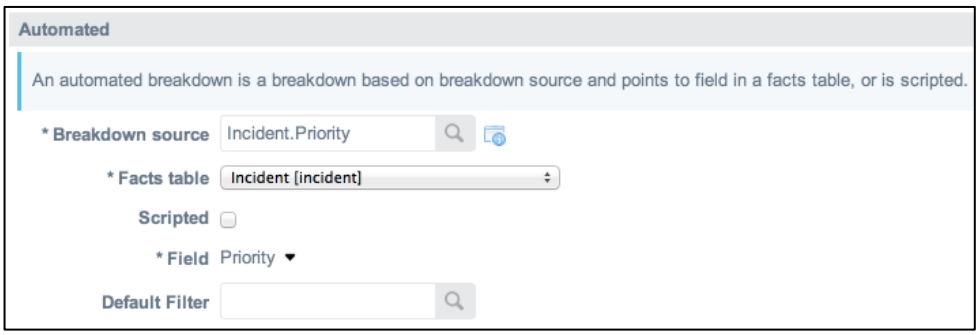
   For Breakdown **Category** in the section **Automated**:
   - the **Breakdown source** is set to **Incident.Category**,
   - the **Facts table** is set to **Incident [incident]**,
   - the **Scripted** checkbox is not ticked,
   - the **Field** is set to **Category**.



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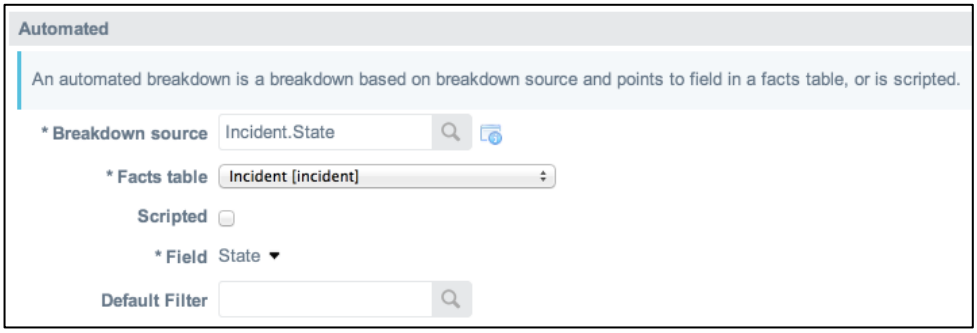
For Breakdown **Priority** in the section **Automated**:

- the **Breakdown source** is set to **Incident.Priority**,
- the **Facts table** is set to **Incident [incident]**,
- the **Scripted** checkbox is not ticked,
- the **Field** is set to **Priority**.



For Breakdown **State** in the section **Automated**:

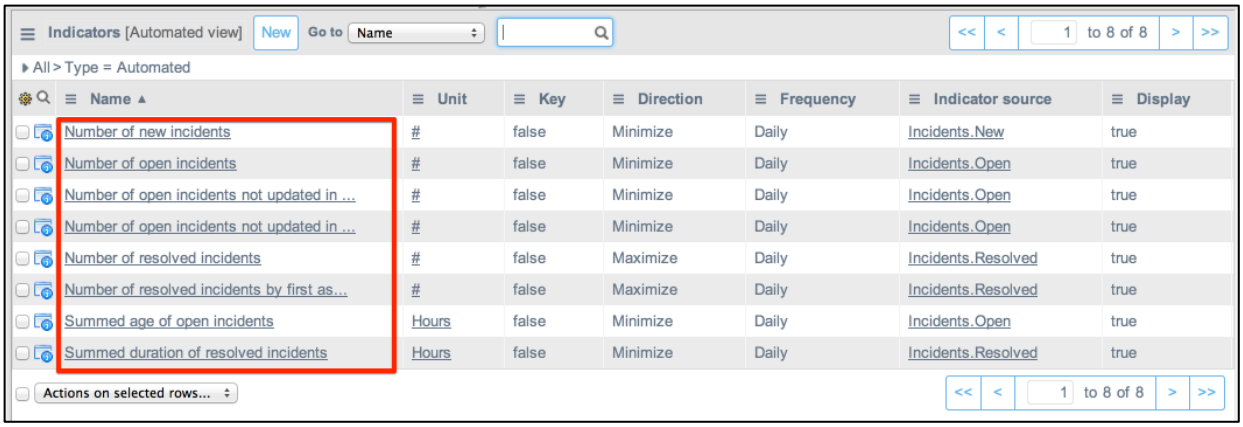
- the **Breakdown source** is set to **Incident.State**,
- the **Facts table** is set to **Incident [incident]**,
- the **Scripted** checkbox is not ticked,
- the **Field** is set to **State**.



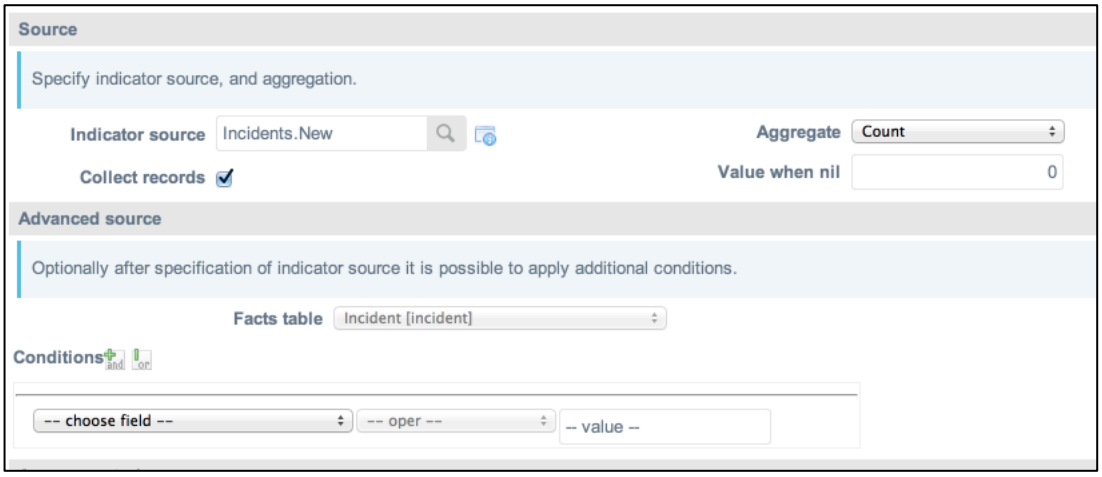
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Verify Settings of Automated Indicators.

1. Navigate to **Performance Analytics > Automated Indicators**. The eight automated indicators from the Trial Version set should show. For these indicators scores are collected using an automated collection job. Verify that the following eight automated indicators are present:

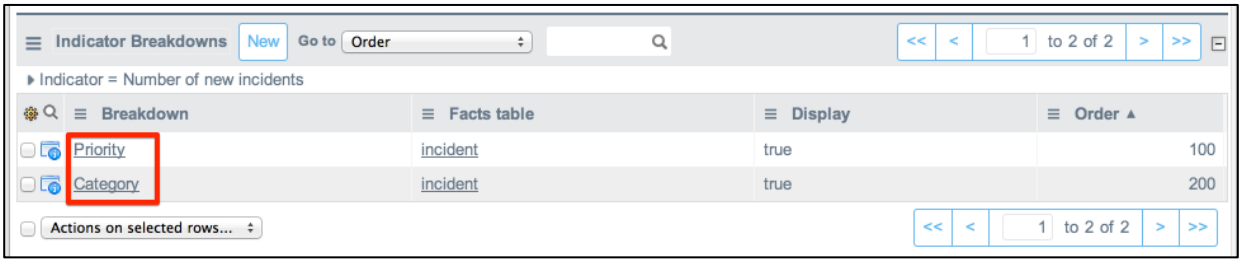


2. Open the first automated indicator **Number of new incidents** in edit mode. Verify that in:
   - the Source section the **Indicator source** is set to **Incidents.New**,
   - the Source section the **Collect records** checkbox is ticked,
   - the Source section the **Aggregate** is set to **Count**,
   - the Source section the **Value when nil** is set to **0**,
   - the **Advanced source** section no additional conditions are set.



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Also, verify for the automated indicator **Number of new incidents** that the indicator is related to the breakdowns **Priority** and **Category**:



3. Verify that for the other seven automated indicators the settings are as follows.

   For automated indicator **Number of open incidents**:

Number of open incidents	
Section Source	
Setting	Value
Indicator source	**Incidents.Open**
Collect records	**Ticked**
Aggregate	**Count**
Value when nil	**0**
Section Advanced source	
Conditions	<empty>
Section Breakdowns	
Related breakdowns	**Priority** **Category** **Assignment Group** **State** **Age**

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For automated indicator **Number of open incidents not updated in last 30 days**:

Number of open incidents not updated in last 30 days	
Section Source	
Setting	Value
Indicator source	**Incidents.Open**
Collect records	**Ticked**
Aggregate	**Count**
Value when nil	**0**
Section Advanced source	
Conditions	**Updated relative on or before 30 Days ago**
Section Breakdowns	
Related breakdowns	**Priority** **Category** **Assignment Group** **State** **Age**

For automated indicator **Number of open incidents not updated in last 5 days**:

Number of open incidents not updated in last 5 days	
Section Source	
Setting	Value
Indicator source	**Incidents.Open**
Collect records	**Ticked**
Aggregate	**Count**
Value when nil	**0**
Section Advanced source	
Conditions	**Updated relative on or before 5 Days ago**
Section Breakdowns	
Related breakdowns	**Priority** **Category** **Assignment Group** **State** **Age**

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For automated indicator **Number of resolved incidents**:

Number of resolved incidents	
Section Source	
Setting	Value
Indicator source	**Incidents.Resolved**
Collect records	**Ticked**
Aggregate	**Count**
Value when nil	**0**
Section Advanced source	
Conditions	<empty>
Section Breakdowns	
Related breakdowns	**Priority** **Category** **Assignment Group**

For automated indicator **Number of resolved incidents by first assignment group**:

Number of resolved incidents by first assignment group	
Section Source	
Setting	Value
Indicator source	**Incidents.Resolved**
Collect records	**Ticked**
Aggregate	**Count**
Value when nil	**0**
Section Advanced source	
Conditions	**Reassignment count is 0**
Section Breakdowns	
Related breakdowns	**Priority** **Category**

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For automated indicator **Summed age of open incidents**:

Summed age of open incidents	
Section Source	
Setting	Value
Indicator source	**Incidents.Open**
Collect records	**Ticked**
Aggregate	**Sum**
Scripted	**Ticked**
Script	**Incident.Age.Hours**
Value when nil	**0**
Section Advanced source	
Conditions	<empty>
Section Breakdowns	
Related breakdowns	**Priority** **Category** **Assignment Group** **State** **Age**

For automated indicator **Summed duration of resolved incidents**:

Summed duration of resolved incidents	
Section Source	
Setting	Value
Indicator source	**Incidents.Resolved**
Collect records	**Ticked**
Aggregate	**Sum**
Scripted	**Ticked**
Script	**Incident.ResolveTime.Hours**
Value when nil	**0**
Section Advanced source	
Conditions	<empty>
Section Breakdowns	
Related breakdowns	**Priority** **Category** **Assignment Group**

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Lab Goal

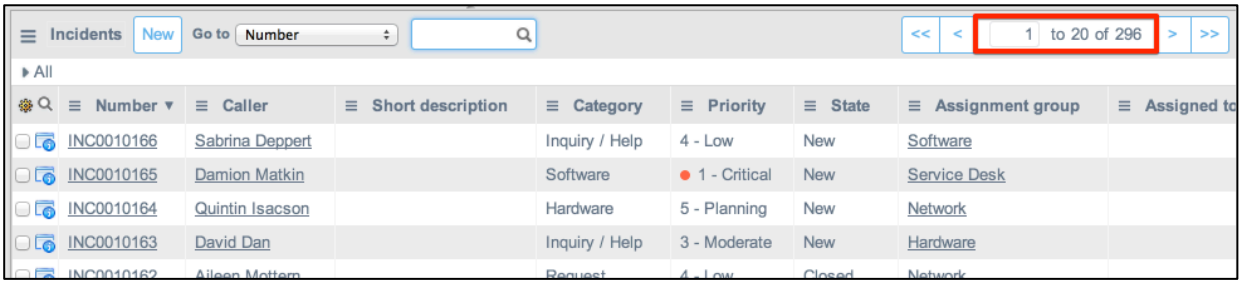
Run data collections so scores are collected for the automated indicators. The scores are stored in separate tables within the ServiceNow database. After the scores have been collected, the scorecards and dashboards are populated for both the automated indicators and the formula indicators.

To see trends for the indicators, scores for multiple dates are needed. Running a historic data collection will collect scores for multiple days.

Lab 2
Run Data Collections

Verify Number of Incidents in Instance

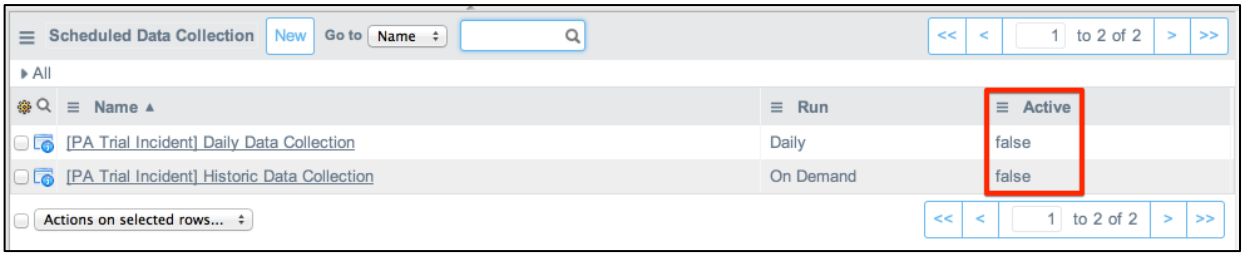
1. Navigate to **Incident > All** and verify that there is a total of **296** incidents in the instance:



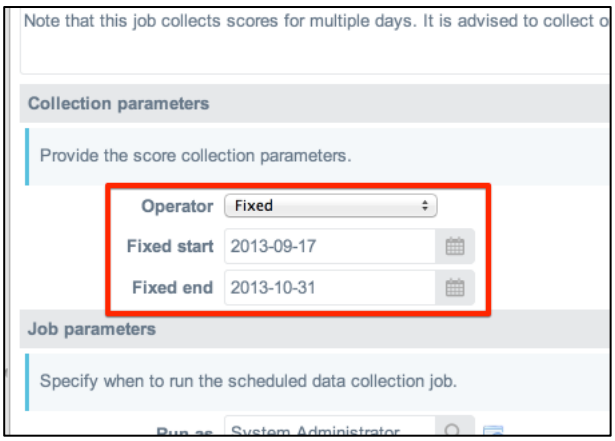
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Set Up Jobs for Historic Data Collection.

1. Navigate to **Performance Analytics > Jobs**. Verify that there are two jobs and for both **Active** is set to **false**:

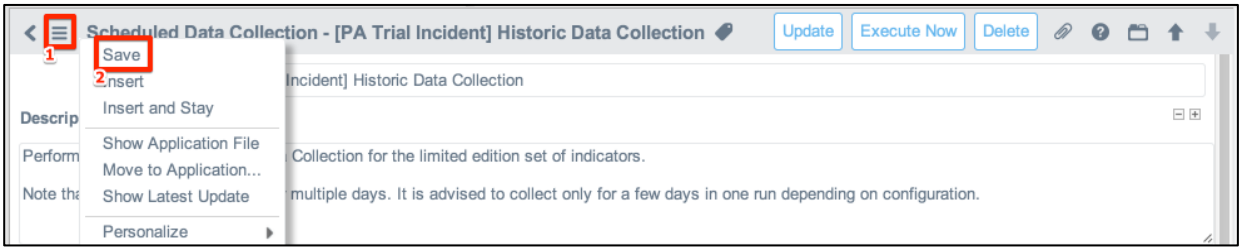


2. Open the **[PA Trial Incident] Historic Data Collection** in edit mode. Change in the **Collection parameters** section:
   - the **Operator** to **Fixed**
   - the **Fixed start** to **2013-09-17**
   - the **Fixed end** to **2013-10-31**:



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3. To save the updated job record, **click** on the 'hamburger' icon (1) in the title bar of the record and select **Save** (2) from the dropdown menu:



4. Scroll down to the Job indicators section and notice that there are six (automated) indicators related to this collection job. The two automated indicators from the Trial Version that are not in this list are:
   - Number of open incidents not updated in last 5 days
   - Number of open incidents not updated in last 30 days

   These two indicators have a query condition like '**Updated relative on or before** x **days ago**'. Therefor a historic data collection for these two indicators would not collect accurate numbers as the collection is run against the 'updated_at' column of the incident table and not the audit log. The collection retrieves the current 'updated_at' date value for an incident, which is likely not the same date value as the incident had two weeks ago.

   Also in the Trial Version set there are two indicators that are combined with two breakdowns that do not collect accurate numbers in a historic data collection. These indicator-breakdown combinations are:
   - **Number of open incidents**, combined with:
     - **Assignment Group**
     - **State**
   - **Summed age of open incidents**, combined with:
     - **Assignment Group**
     - **State**

   The reason for not collecting accurate numbers is the same as above: a collection retrieves the current Assignment Group and State values for an incident, which are likely not the same values as the incident had two weeks ago. So in the historic data collection job these breakdowns should not be included for the two indicators.

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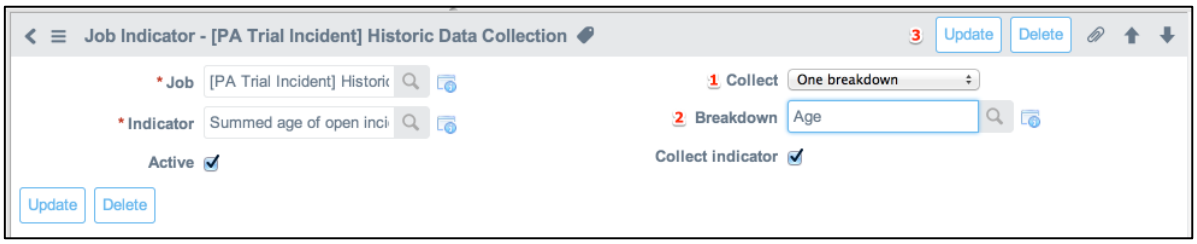
In the saved job form scroll down to the **Job Indicator** section at the bottom of the form. Open the **Number of open incidents** job indicator in edit mode. Change

- the **Collect** parameter to **One breakdown** (1), and
- type **Age** in the **Breakdown** field (2), and
- click the **Update** button (3):

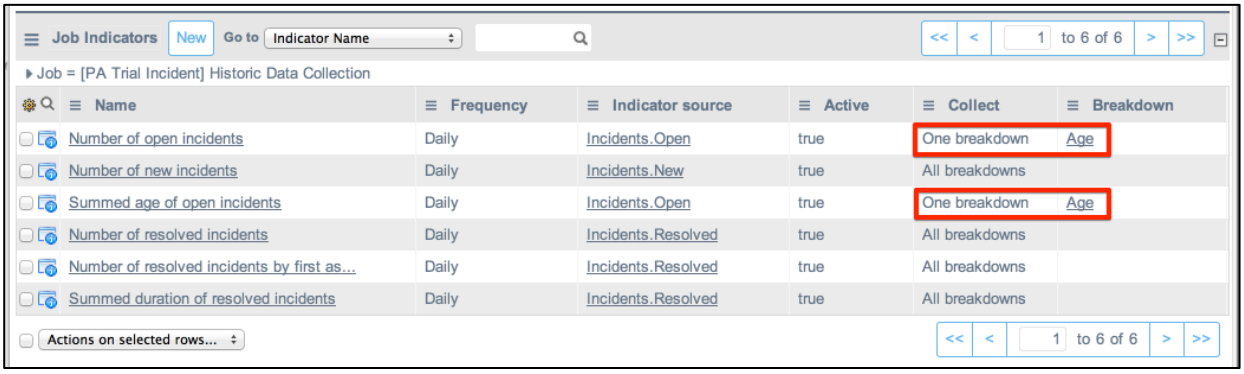


Do the same for the other indicator. Open the **Summed age of open incidents** job indicator in edit mode. Change

- the **Collect** parameter to **One breakdown** (1), and
- type **Age** in the **Breakdown** field (2), and
- click the **Update** button (3):



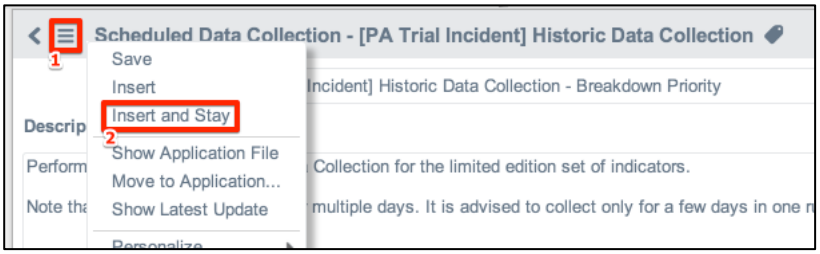
The **Job Indicators** section of the job should look like:



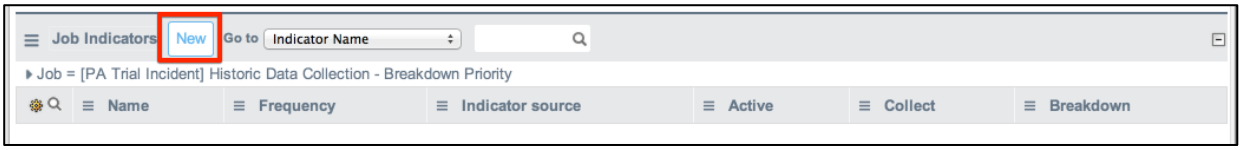
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5. Two additional collection jobs are needed to collect the historic scores for the **Number of open incidents** and **Summed age open incidents** One job combines the indicators with the breakdown **Priority** and the other job combines the indicators with the breakdown **Category**.

   For the first additional job, scroll up to the **Name** field of the job and change the name from **[PA Trial Incident] Historic Data Collection** to **[PA Trial Incident] Historic Data Collection – Breakdown Priority**. To save the updated job record as a new job record, **click** on the 'hamburger' icon (1) in the title bar of the record and select **Insert and stay** (2) from the dropdown menu:



   Scroll down to the **Job indicators** section and notice that there are no indicators related to this new collection job yet. Click the **New** button to add indicators to this job:



   On the **Job indicator** form,

   - type in the **Indicator** field **Number of open incidents** (1),
   - choose from the **Collect** dropdown **One breakdown** (2),
   - type in the **Breakdown** field **Priority** (3),
   - from the **Collect indicator** checkbox remove the tick (4),
   - click the **Submit** button at the top of the form (5):

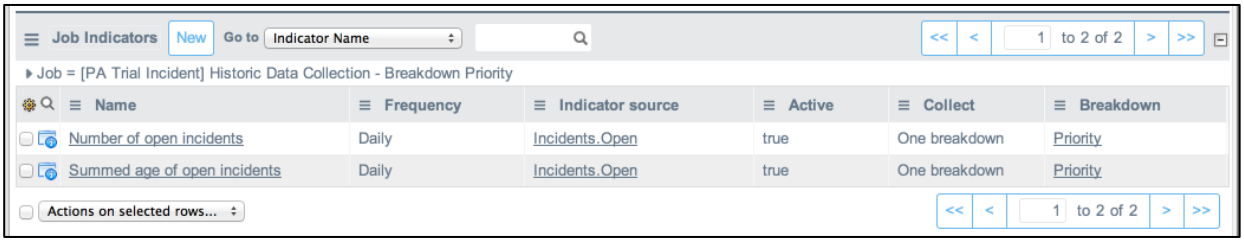


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Back on the job form, perform the same actions again for the indicator **Summed age of open incidents** and breakdown **Priority**. Click the **New** button to add the indicator to this job. On the **Job indicator** form,

- type in the **Indicator** field **Summed age of open incidents**,
- choose from the **Collect** dropdown **One breakdown**,
- type in the **Breakdown** field **Priority**,
- from the **Collect indicator** checkbox remove the tick
- click the **Submit** button at the top of the form.

Back on the job form, the **Job Indicators** section should look like:



Click the **Save** option from the 'hamburger' icon in the title bar of the job record to save the **[PA Trial Incident] Historic Data Collection – Breakdown Priority** job.

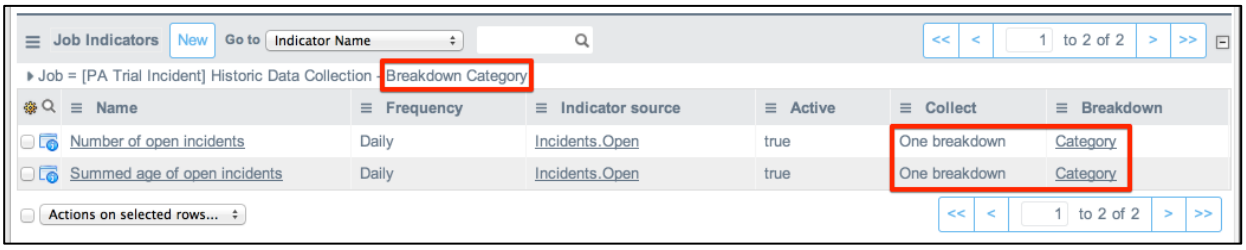
6. For the second additional historic data collection job, scroll up to the **Name** field of the job and change the name from **[PA Trial Incident] Historic Data Collection – Breakdown Priority** to **[PA Trial Incident] Historic Data Collection – Breakdown Category**. To save the updated job record as a new job record, **click** on the 'hamburger' icon in the title bar of the record and select **Insert and stay** from the dropdown menu.

   Scroll down to the **Job indicators** section and click the **New** button to add indicators to this job. Add for the indicator **Number of open incidents** the breakdown **Category** and do not collect the overall indicator score. Click the **Submit** button.

   Add a new job indicator using the indicator **Summed age of open incidents** and applying the same settings as above.

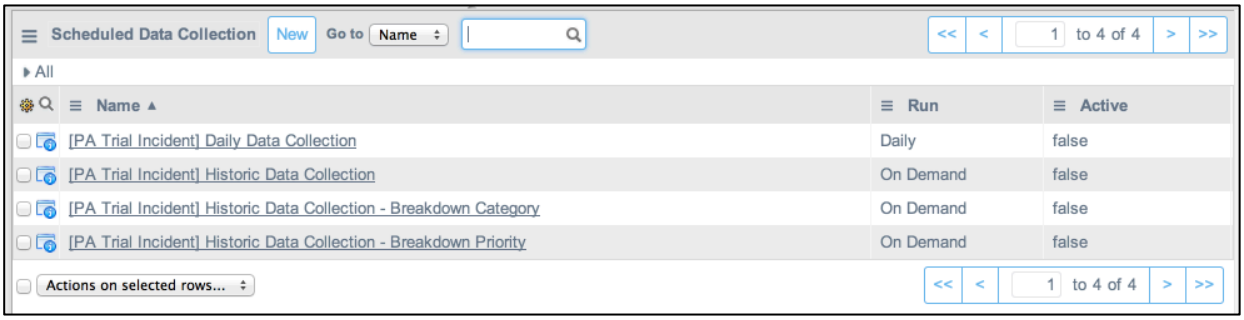
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Back on the job form, the **Job Indicators** section should look like:



Click the **Update** button to save this collection job.

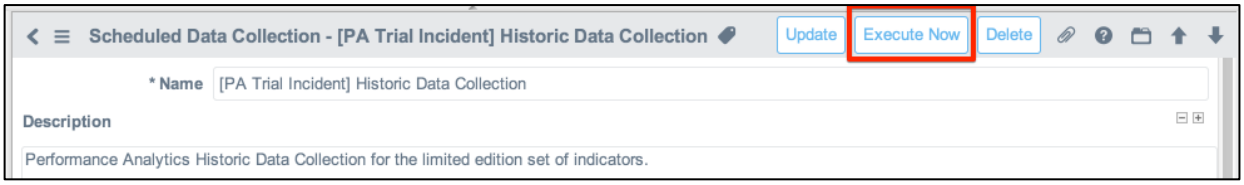
7. Navigate to **Performance Analytics > Jobs** and verify that there are four jobs:



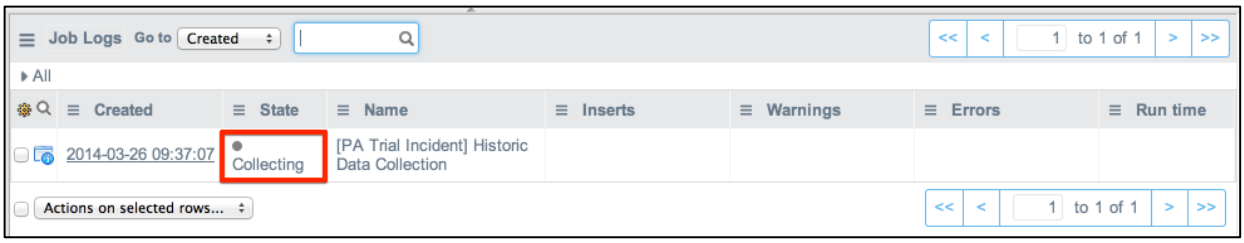
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Run Historic Data Collections.

1. From the jobs view open the **[PA Trial Incident] Historic Data Collection** in edit mode and click the **Execute Now** button:

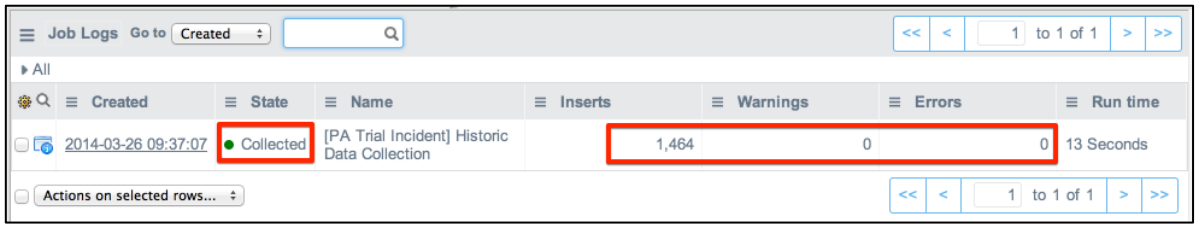


2. Navigate to **Performance Analytics > Job logs**. When the collection is still running, the view shows one log with **State** on **Collecting**:



If the collection has finished the collection log shows like:

- **State** is **Collected**,
- **Inserts** is **1,464**,
- **Warnings** is **0**,
- **Errors** is **0**:

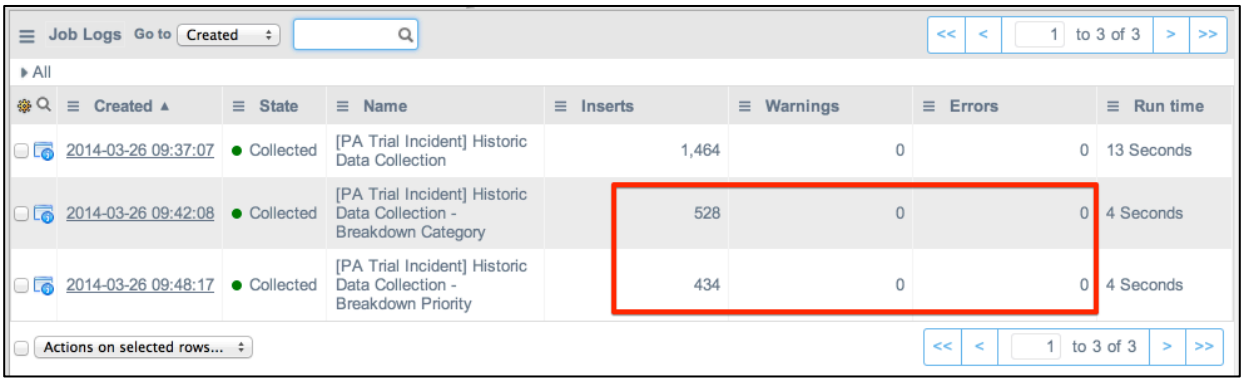


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3. Navigate back to **Performance Analytics > Jobs** and open the **[PA Trial Incident] Historic Data Collection – Breakdown Category** in edit mode and click the **Execute Now** button.

4. Also run the **[PA Trial Incident] Historic Data Collection – Breakdown Priority** collection job.

5. Navigate to **Performance Analytics > Job logs**. The finished collection logs show for the:
   - **[PA Trial Incident] Historic Data Collection – Breakdown Category** collection job
     - **Inserts** is **528**,
     - **Warnings** is **0**,
     - **Errors** is **0**:
   - **[PA Trial Incident] Historic Data Collection – Breakdown Priority** collection job
     - **Inserts** is **434**,
     - **Warnings** is **0**,
     - **Errors** is **0**:

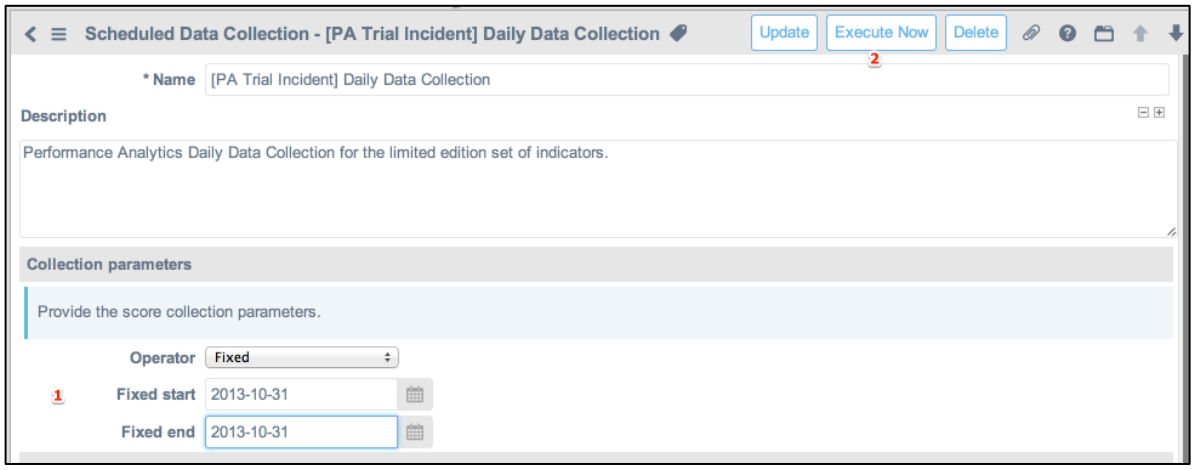


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Run 1-Day Data Collection for October 31, 2013.

1. Navigate to **Performance Analytics > Jobs** and open the **[PA Trial Incident] Daily Data Collection** in edit mode. Change in
   - the **Collection parameters** (1)
     - the **Operator** to **Fixed**, and
     - the **Fixed start** to **2013-10-31**, and
     - the **Fixed end** to **2013-10-31**.

   - Next click the **Execute Now** button (2):

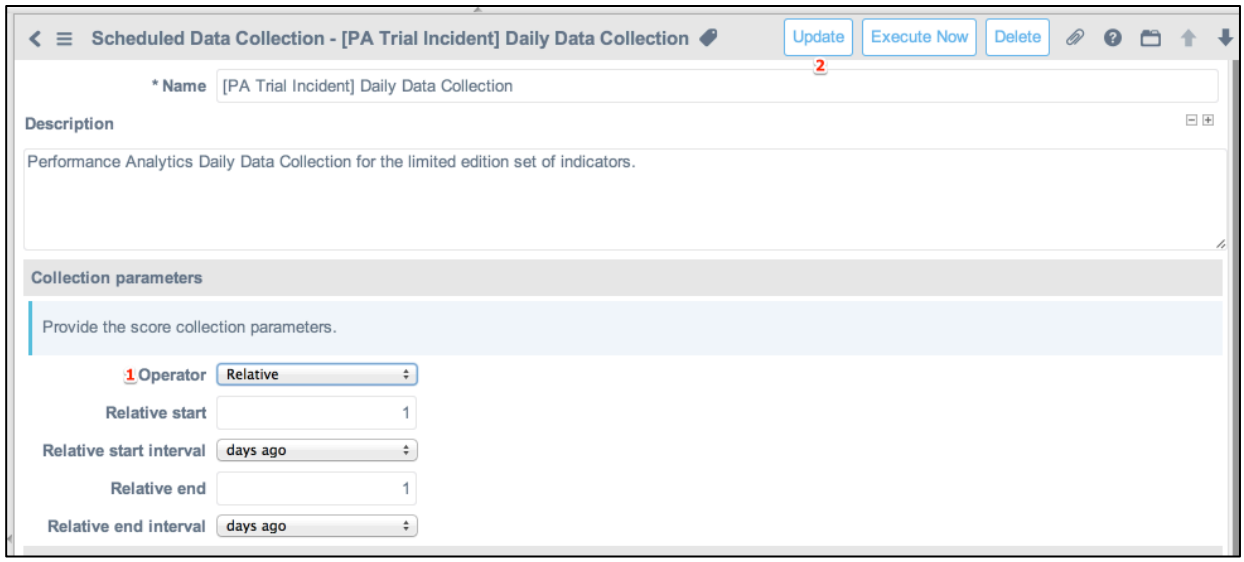


2. If the collection has finished the collection log shows like:
   - **Inserts** is **89**,
   - **Warnings** is **0**,
   - **Errors** is **0**:



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3. Navigate to **Performance Analytics > Jobs** and open the **[PA Trial Incident] Daily Data Collection** in edit mode. Change in the **Collection parameters** (1) the **Operator** back to **Relative** and click the **Update** button (2):



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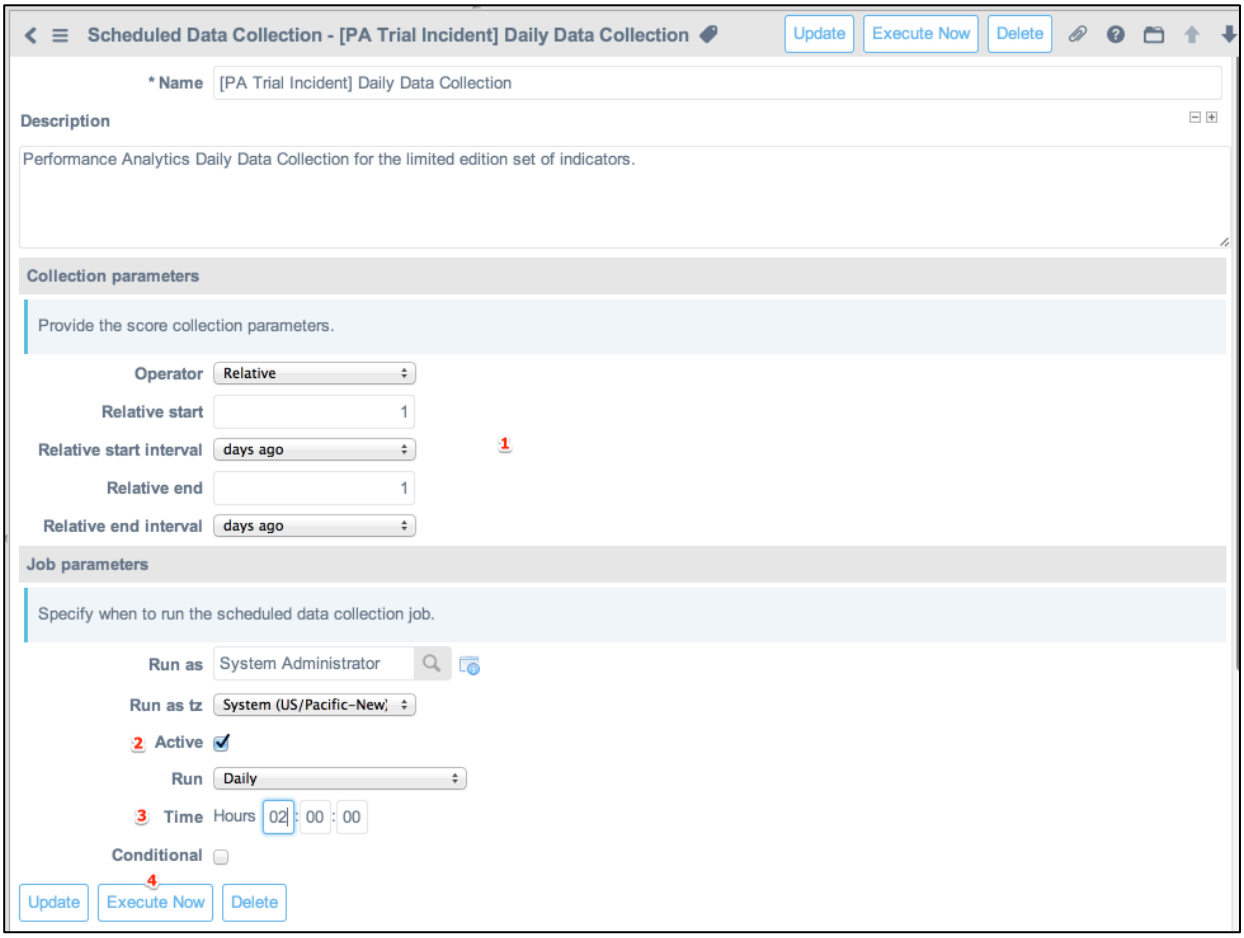
NOTE: When getting started with the Trial Version or Premium Edition of Performance Analytics in Eureka on your (sub) prod instance, then do not perform the actions as described in the last exercise above. Simply go to the out of the box collection job,

a. check if the right indicators are related to the job,

b. leave the settings for the **Collection parameters** as they are (1),

c. on the **Job parameters** (check the **Run as** and **Run as tz** settings) tick the **Activate** checkbox (2) and set an off peak hours collection **Time** (3),

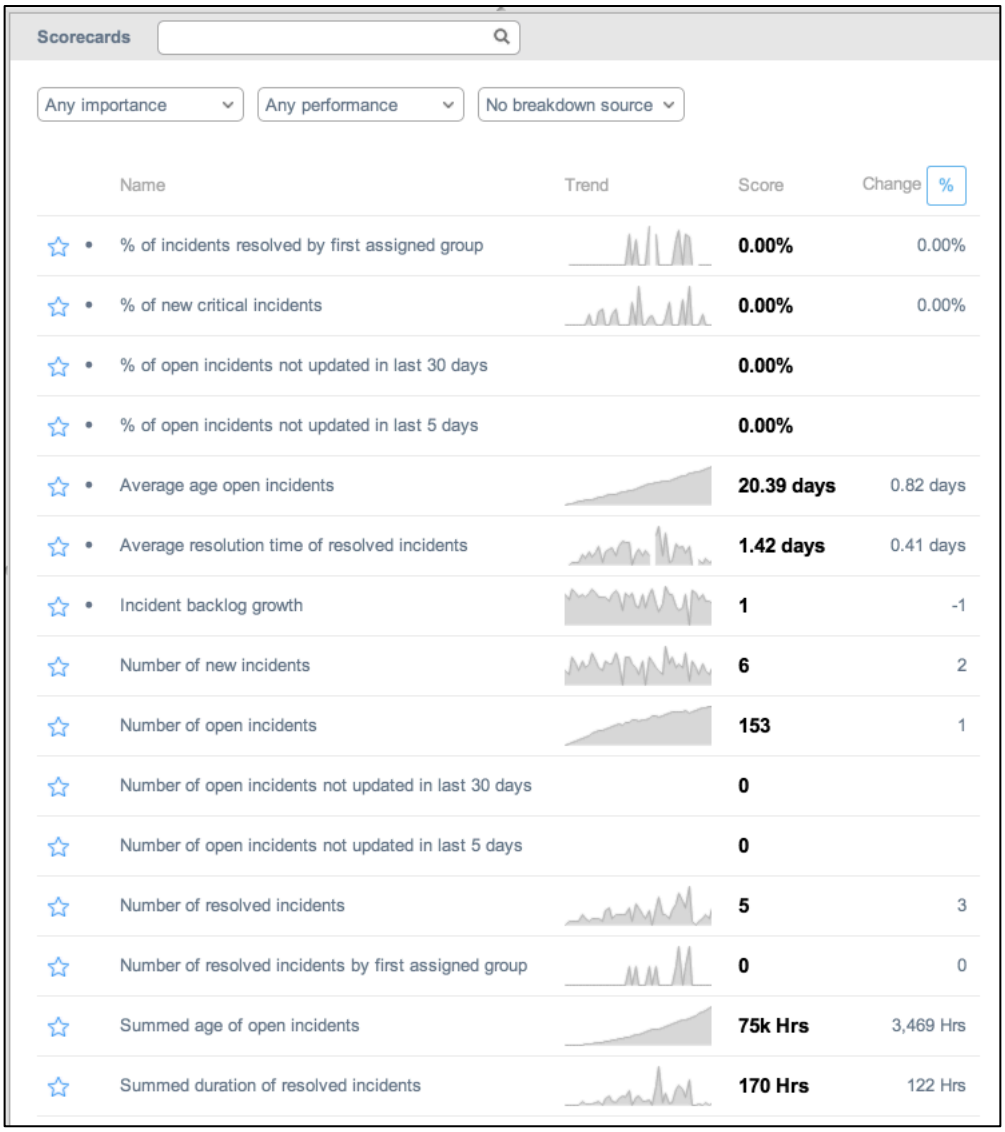
d. next click the **Execute now** button (4) to collect the scores for yesterday:



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Lab Success Verification

1. Navigate to **Performance Analytics > Scorecards**. Your screen should look like this**:**



Notice that also for the formula indicators, the top 7 in the list above, scores have been calculated.

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Lab Goal

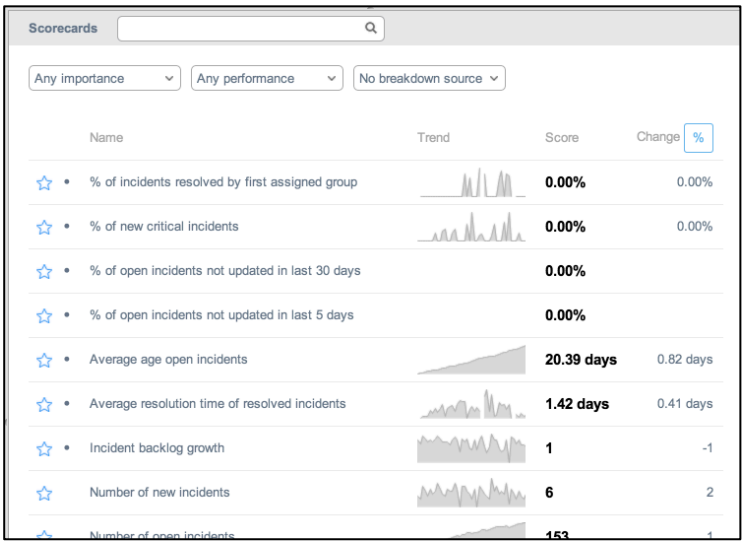
Setting targets gives context to scores and direction to performance improvement. Targets can be set for indicators, breakdowns, and time series.

For indicators with daily collected or calculated scores, setting targets with time series provides more useful information. The target for the sum of indicator scores over a period of for example 28 days, provides a clearer view on the direction the indicator is moving than the same target for the daily score.

Lab 3
Activate and Set Targets

View Scores Before Target Setting

1. Navigate to **Performance Analytics > Scorecards**. The upper part of your screen should look like this**:**



Notice how all scores have a black color font.

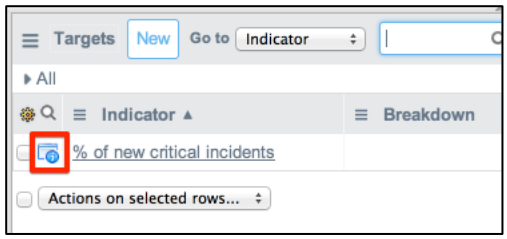
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Edit and Activate Targets

1. Navigate to **Performance Analytics > Targets**. In the Trial Version one target record shows that is not yet activated**:**



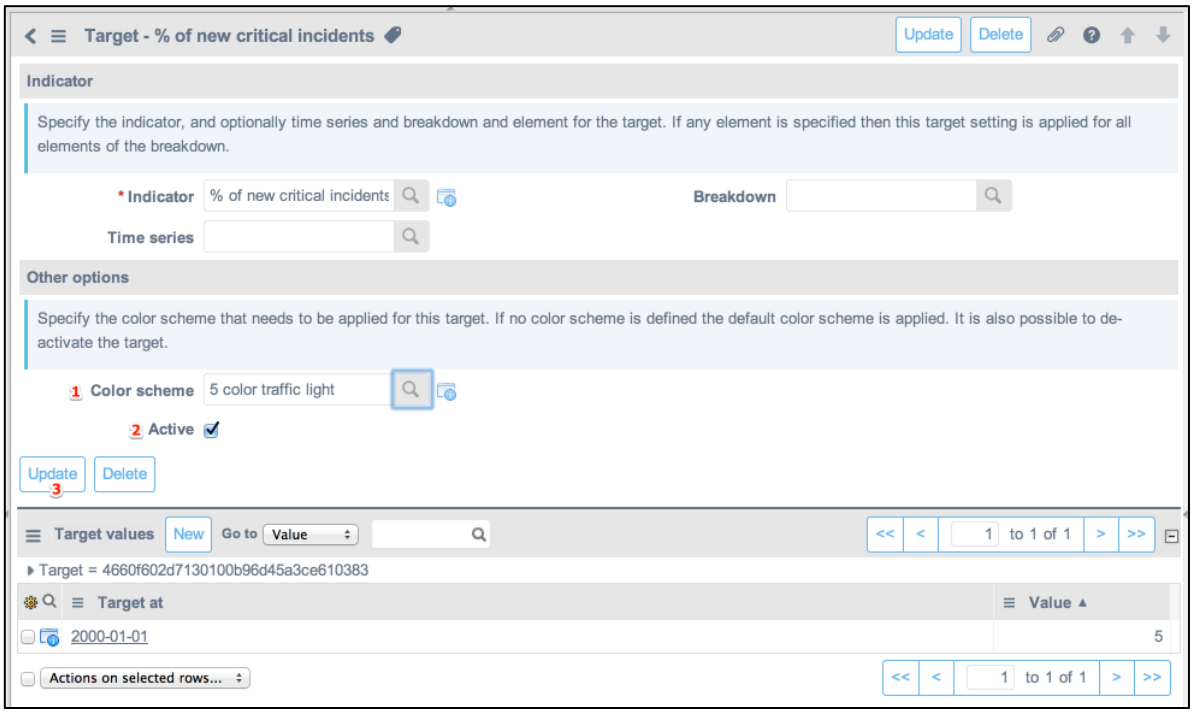
2. Open the target record in edit mode, **click** on the icon in front of the indicator name:



(Clicking on the name opens the indicator record!)

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3. In the **Other options** section change the
   - **Color scheme** to **5 color traffic light** (1), and
   - tick the **Active** checkbox to activate the target (2), and
   - click the **Update** button to save the changed settings (3):

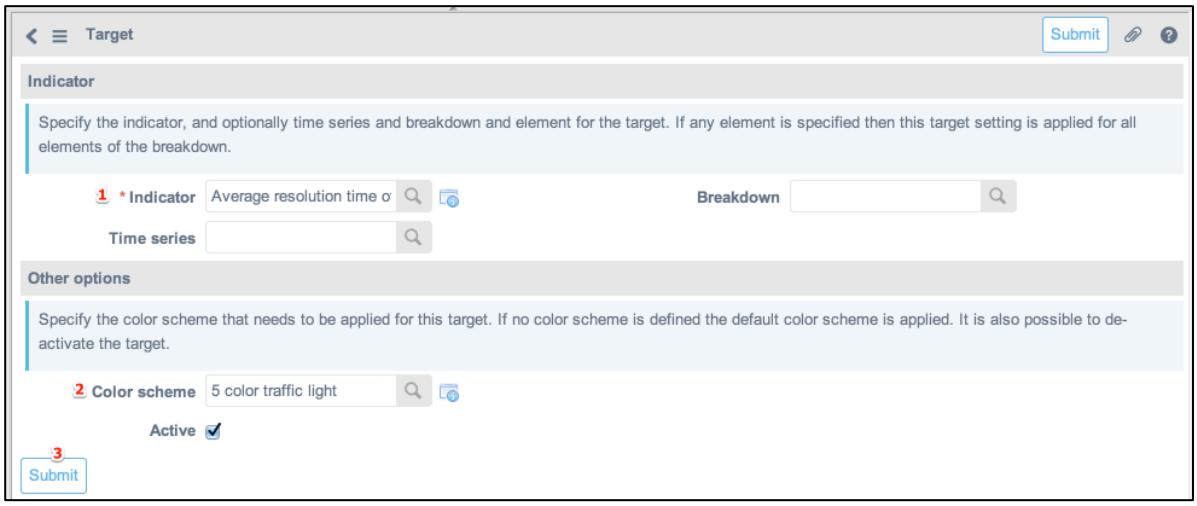


4. Navigate to **Performance Analytics > Targets** and click the **New** button:

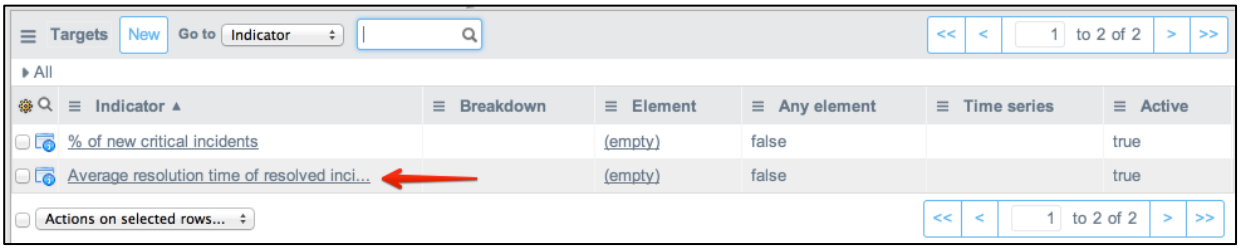


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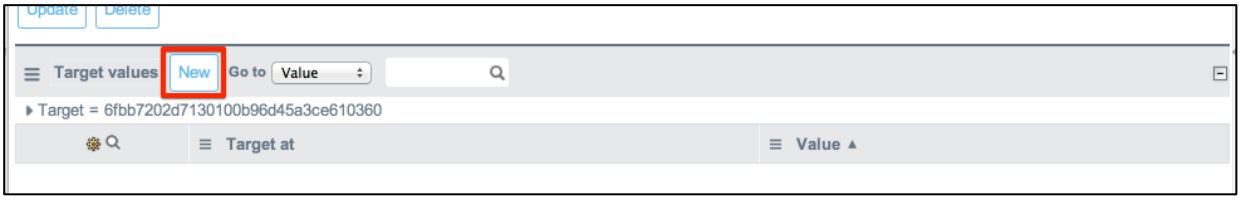
5. On the new target record, set
   - **Indicator** to **Average resolution time of resolved incidents** (1),
   - **Color scheme** to **5 color traffic light** (2),
   - and click the **Submit** button (3):



The new target record is created:



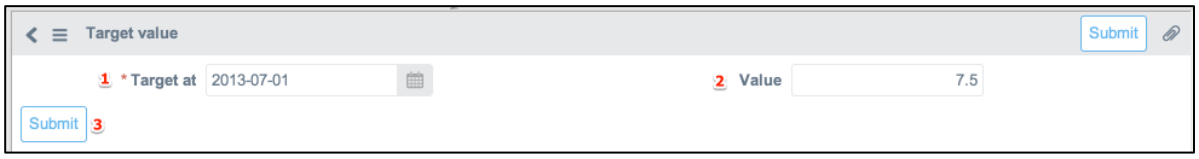
6. Re-open the newly created target record and in the **Target values** section at the bottom of the form, click the **New** button:



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In the target value form, set

- **Target at** to **July 1, 2013** (1),
- **Value** to **7.5** (2),
- and click the **Submit** button (3):



Back in the target record form, click once more the **New** button in the **Target values** section and add a second target in a new target value form. Set

- **Target at** to **October 25, 2013**,
- **Value** to **5**,
- and **click** the **Submit** button.

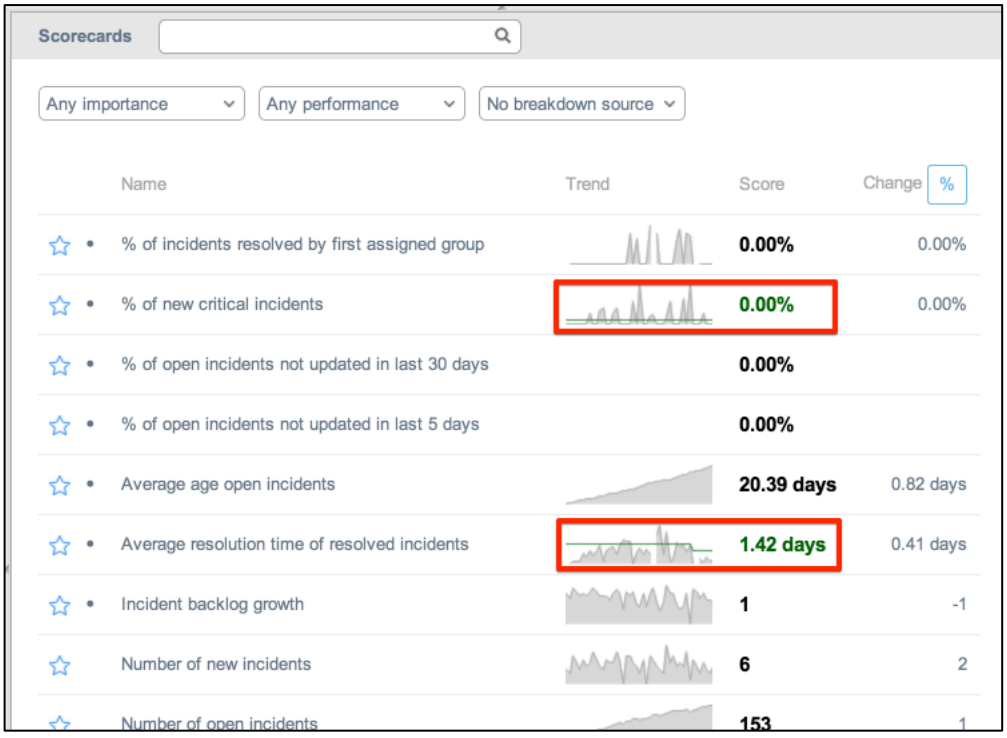
The **Target values** section should look like:



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Lab Success Verification

1. Navigate to **Performance Analytics > Scorecards**. The upper part of your screen should look like this**:**

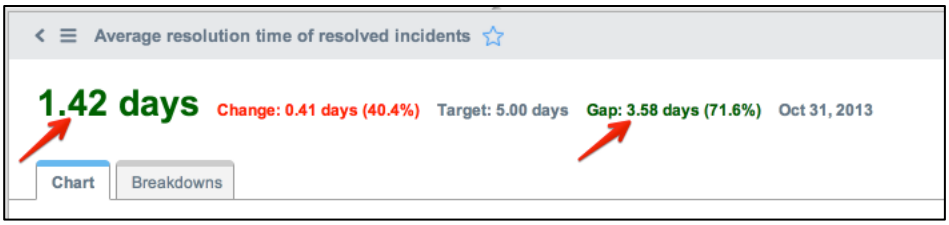


Notice that for the two indicators for which targets are set and activated,

- the font color is no longer black. The green color of the font indicates that the latest score meets target, and
- the target appears as a green line in the spark line of the Trend column.

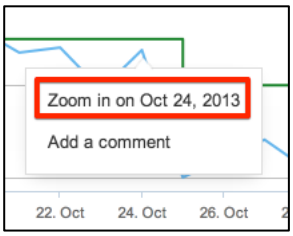
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2. Click on the name **Average resolution time of resolved incidents** to open the detailed scorecard for this indicator. Notice that the score for October 31 (the latest score available) colors dark green as the **gap** to target is more than 25%**:**

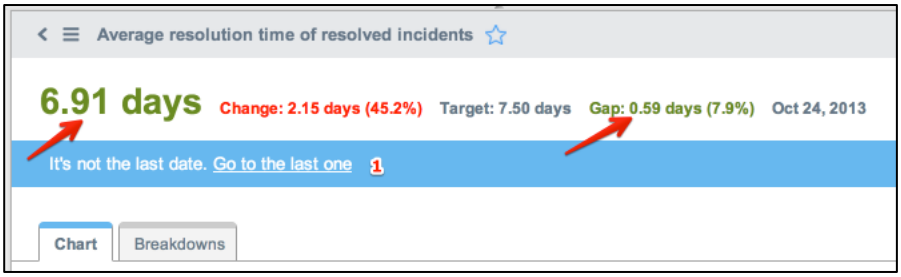


NOTE: the **Target Color Schemes** is a system setting that allows to set colors for 5 specific gap ranges.

Next, **hover** the mouse cursor on the line chart to **October 24** and click on the **blue triangle** representing the score for that date. From the pop up menu select **Zoom in on Oct 24, 2013**:

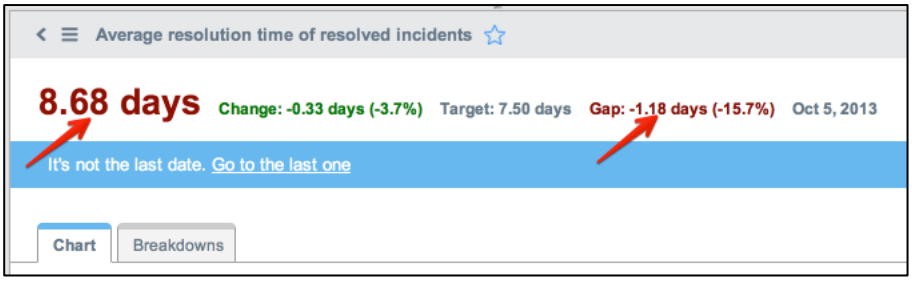


Notice that the score for October 24 colors green as the **gap** to target is between 0 and 25%:



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Finally, **click** on the **Go the last one** link (1, see screenshot above). **Hover** the mouse cursor on the line chart to **October 5** and click on the **blue triangle**. From the pop up menu select **Zoom in on Oct 5, 2013**. Notice that the score for October 5 colors dark red as the **gap** to target is between minus 10 and minus 25%:



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Lab Goal

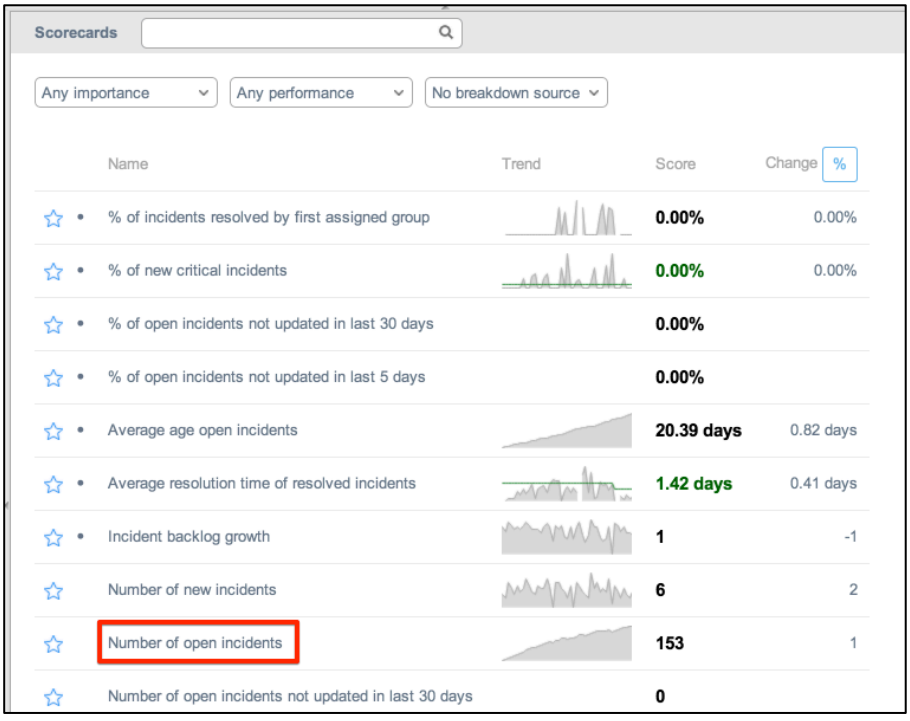
Thresholds are used to implement exception reporting for indicators. With thresholds boundaries for indicator scores are set that guard normal or desired behavior. If a (new) score passes the boundaries the thresholds generates an event. This event can trigger notification emails to users and/or create a note for that score which is visible on a detailed scorecard.

Thresholds can be set for indicators, breakdowns, and time series.

Lab 4
Activate and Set Thresholds

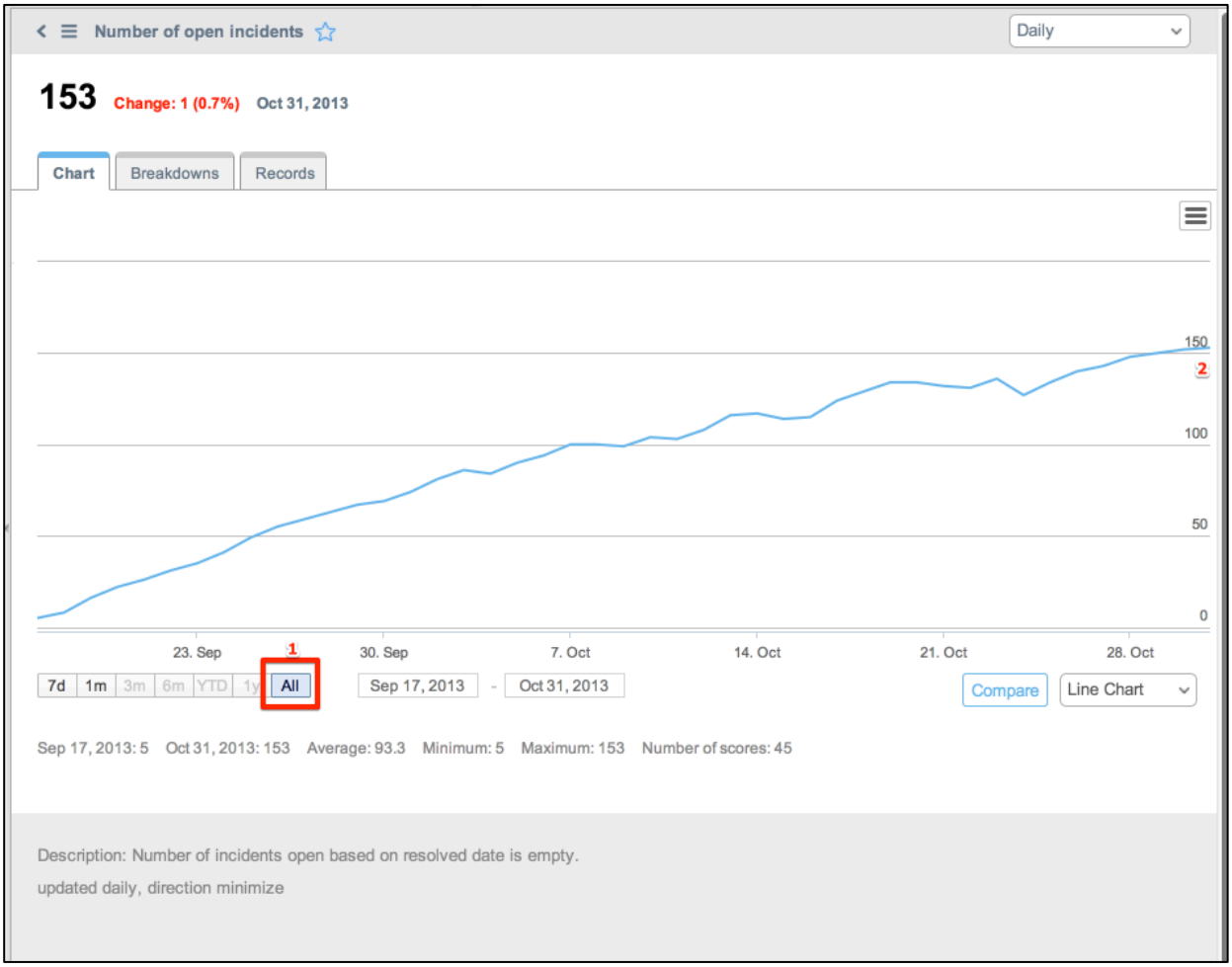
View Detailed Scorecard Before Threshold Setting

1. Navigate to **Performance Analytics > Scorecards** and click on the name of the indicator **Number of open incidents:**



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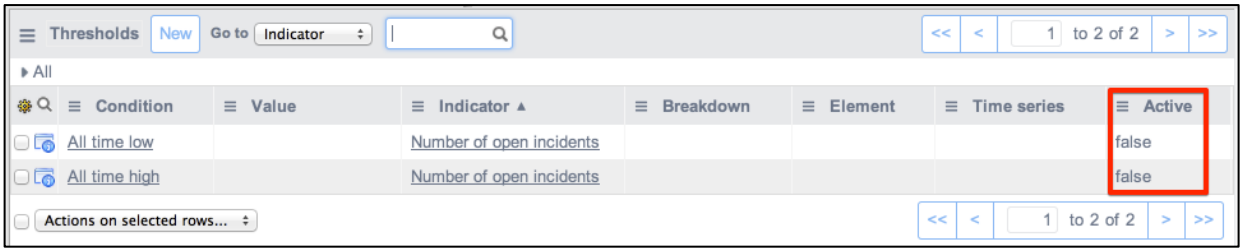
2. This opens the detailed scorecard for this indicator. Switch the date range in the chart to **All** (1) and notice that the score for the last date available (2) is the highest score for this indicator:



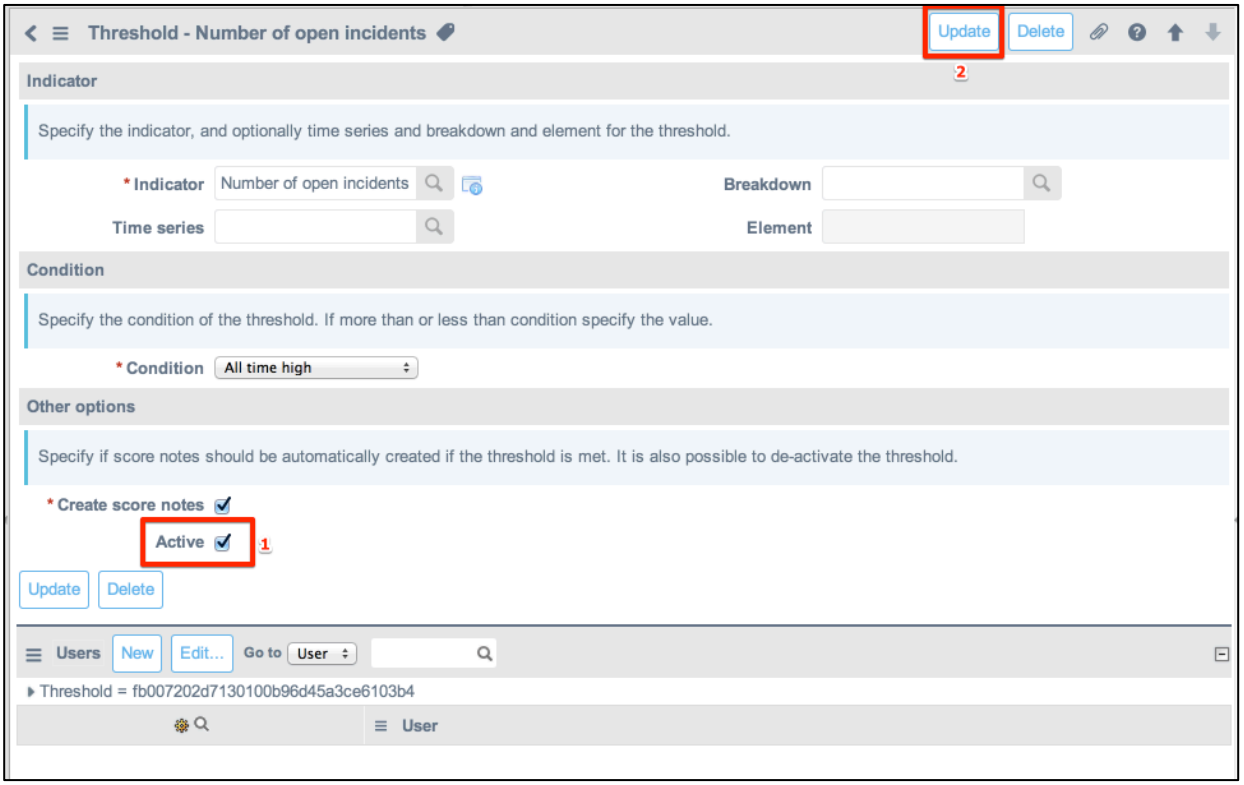
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Edit and Activate Thresholds

1. Navigate to **Performance Analytics > Thresholds**. In the Trial Version two thresholds are set but not activated**:**



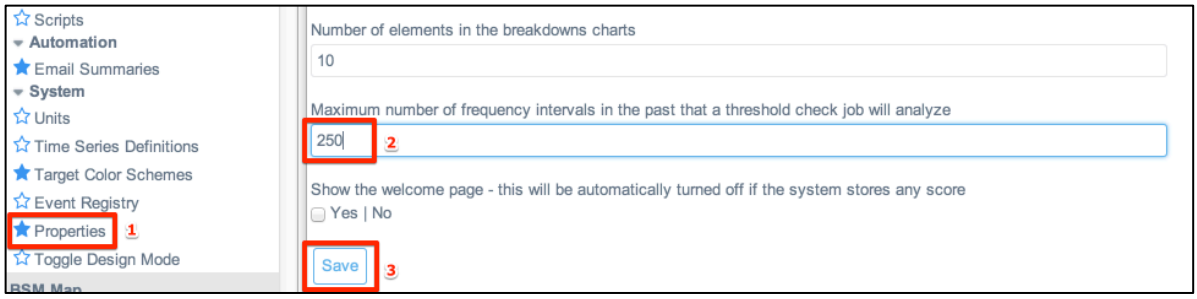
2. Open the **All time high** threshold record in edit mode Tick the **Activate** checkbox (1) and click the **Update** button (2):



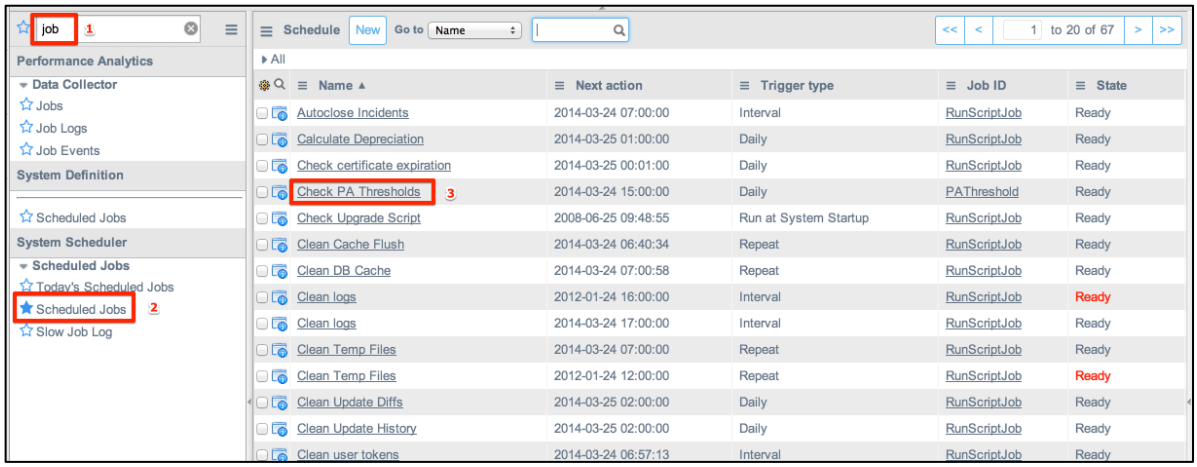
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Lab Success Verification

1. On this lab instance the dates for which scores are collected is from September 17, 2013 to October 31, 2013. By default the threshold checker only checks for the last two frequency intervals, in this case it only checks for scores collected today and yesterday. So the threshold checker will not trigger anything. This default setting can be changed so it includes also the scores from September 17, 2013 and onward.
   - Navigate to **Performance Analytics > Properties**.
   - Scroll down to the **Maximum number of frequency intervals in the past that a thresholds check job will analyze** setting and change the value from 2 to **250**.
   - Click the **Save** button.

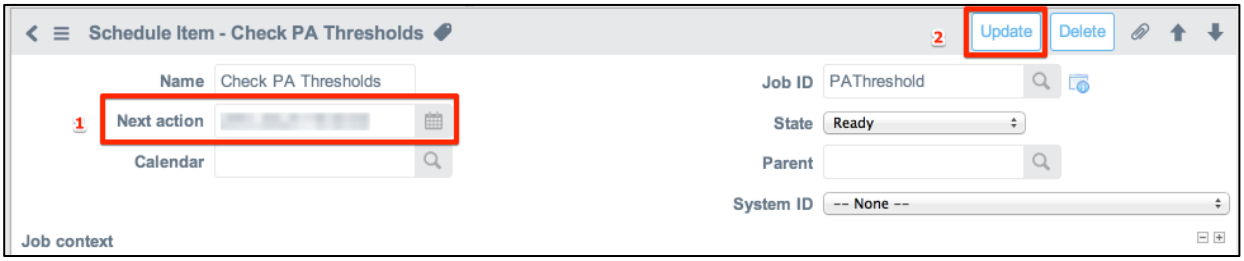


2. Next manually kickoff the threshold checker job.
   - In the **Search** box of the navigation pane type in **job** (1).
   - Select **Scheduled Jobs** from the navigation pane (2).
   - Click on the scheduled job with name **Check PA Thresholds** (3)**.**



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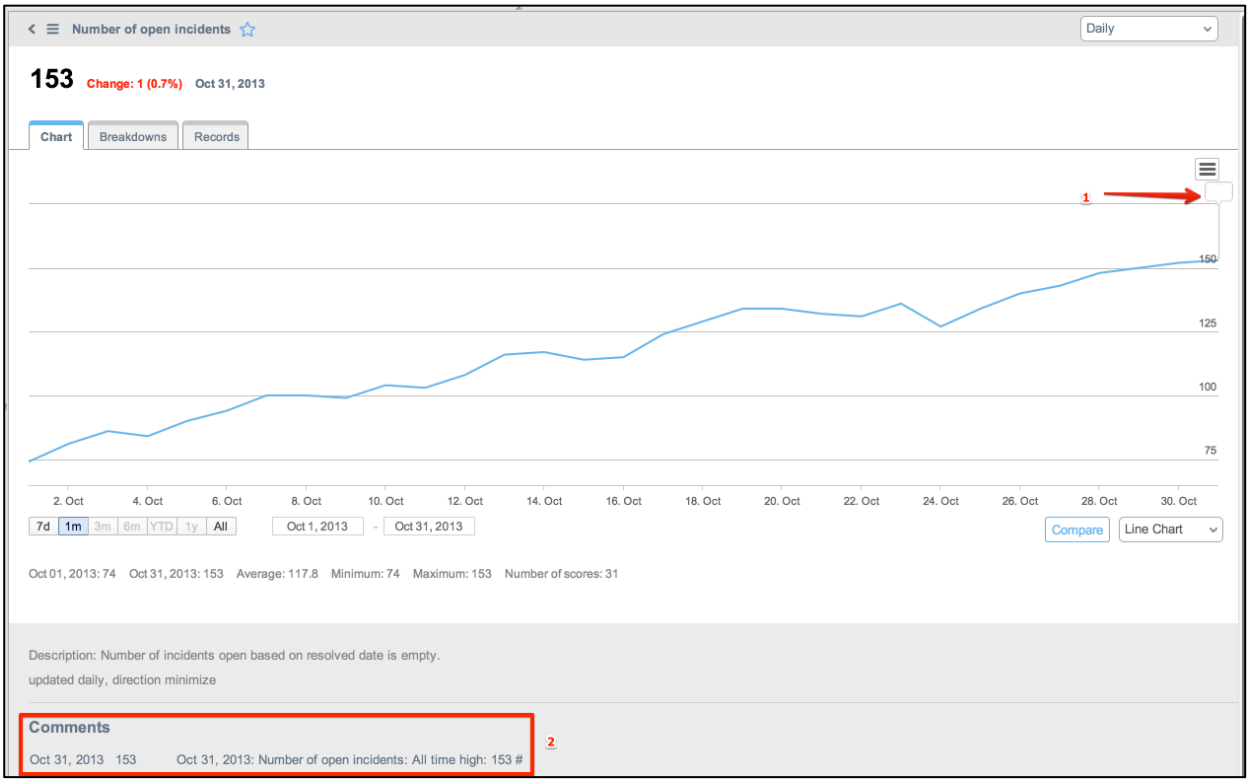
Next, reset in the **Next action** field the date-time value to any value in the past and click the **Update** button**:**



This will kick off the threshold job to run.

3. Navigate to **Performance Analytics > Scorecards** and click on the name of the indicator **Number of open incidents**.

   This opens the detailed scorecard for this indicator. Notice that a score note is created for October 31, 2013 (1) and the Comment for this note is 'All time high' (2):



(It can take up to a minute before the threshold job is run and a score comment is added.)

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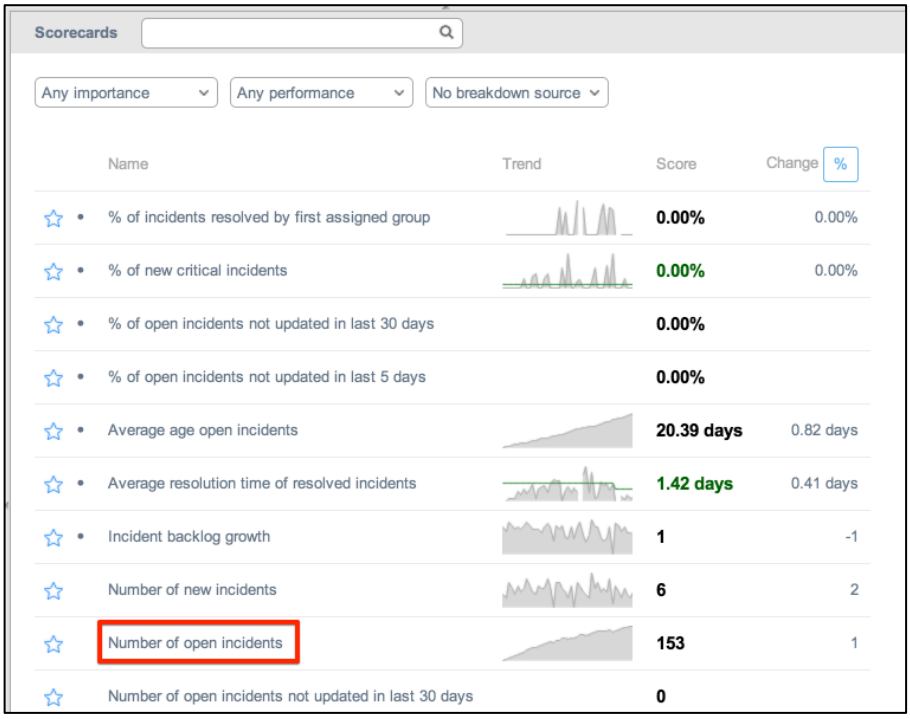
Lab Goal

Potentially the list of elements of a breakdown can be very long. To help users to easily retrieve and group the elements they are interested in, filters can help. This lab explains how to create dynamic system filters. Personal filters can be used too, but are as the name suggests personal.

Lab 5
Add Filters to Detailed Scorecards

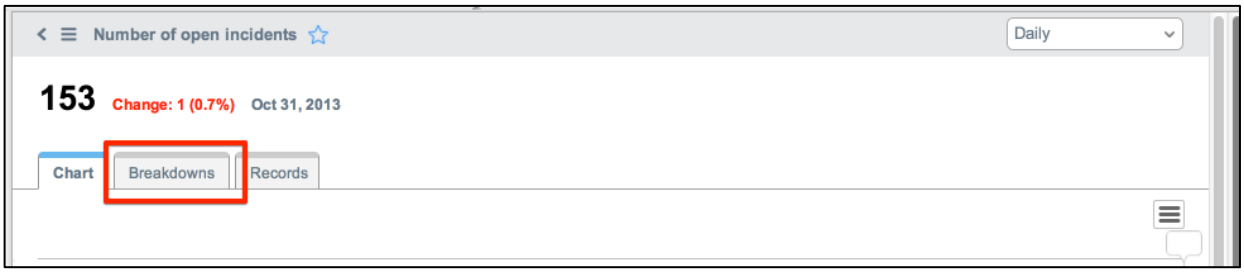
View Detailed Scorecard Before Threshold Setting

1. Navigate to **Performance Analytics > Scorecards** and click on the name of the indicator **Number of open incidents:**

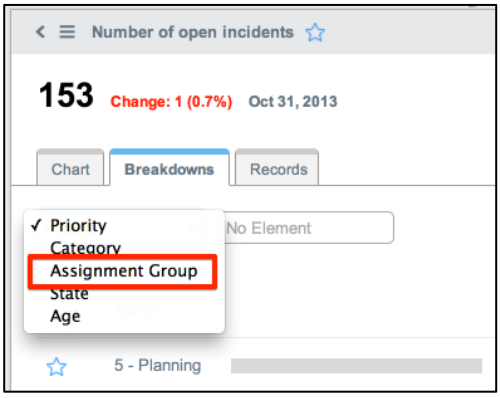


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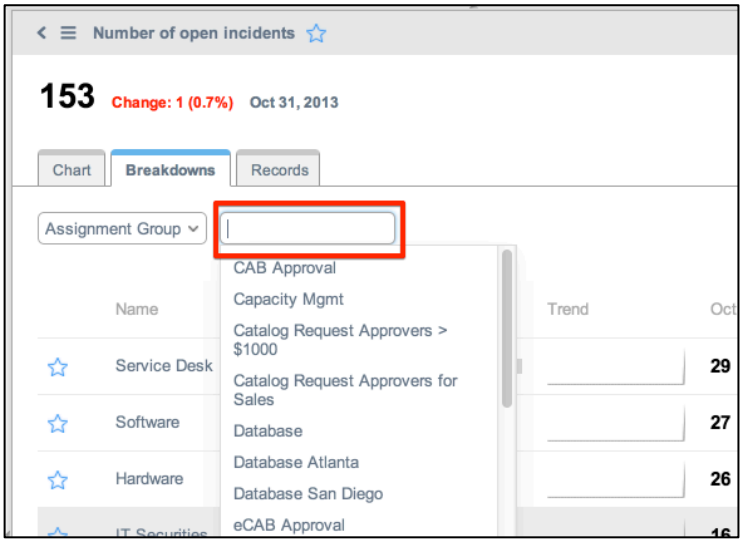
2. This opens the detailed scorecard for this indicator. Click on the second tab **Breakdown**:



From the dropdown list of breakdowns select **Assignment group**:



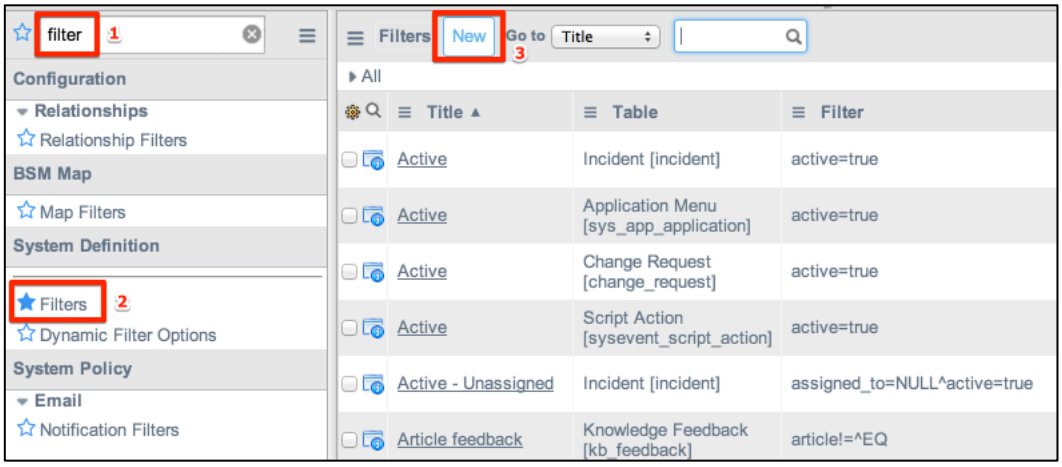
3. Navigate the cursor to the element field and notice how to select one specific breakdown element from that field:



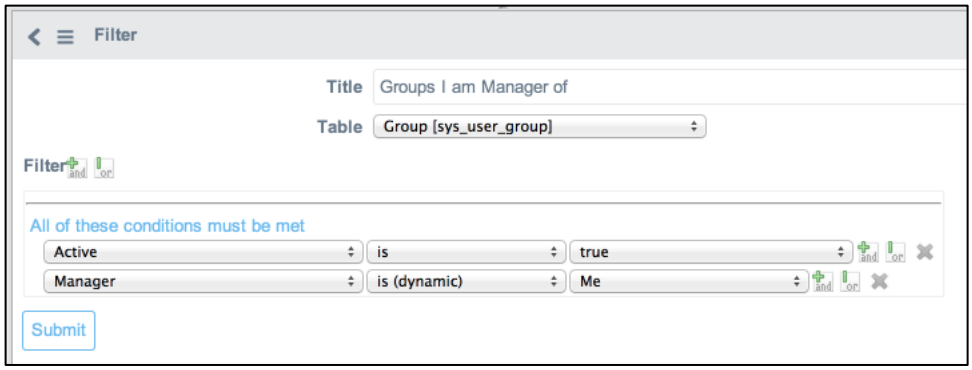
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Create Dynamic System Filters

1. To create new system filters
   - in the **Search** box of the navigation pane type in **filter** (1),
   - select **Filters** from the navigation pane (2), and
   - click on the **New** button (3).

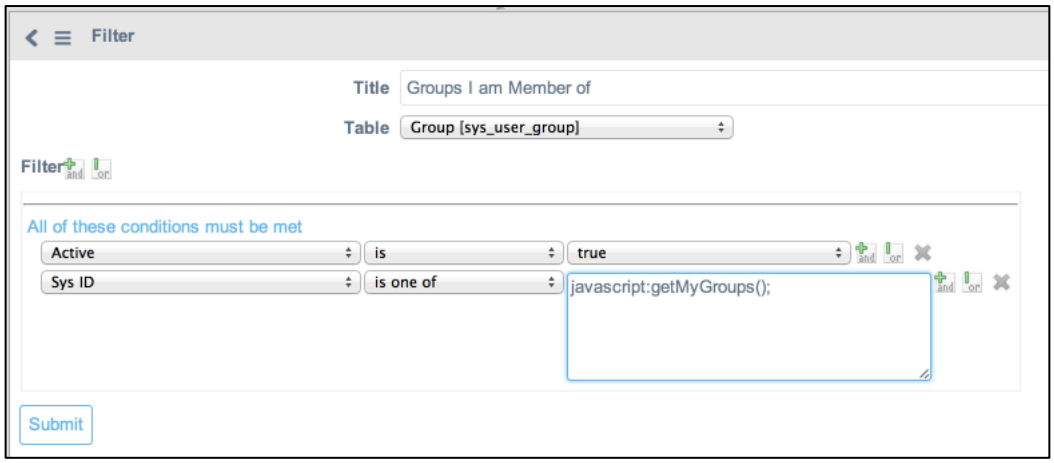


2. On the filter form set for the new filter
   - the **Title** to **Groups I am Manager of**,
   - the **Table** to **Group [sys_user_group]**,
   - the **Filter** to
     - **Active is true**
     - AND **Manager is (dynamic) Me**
   - and click the **Submit** button.



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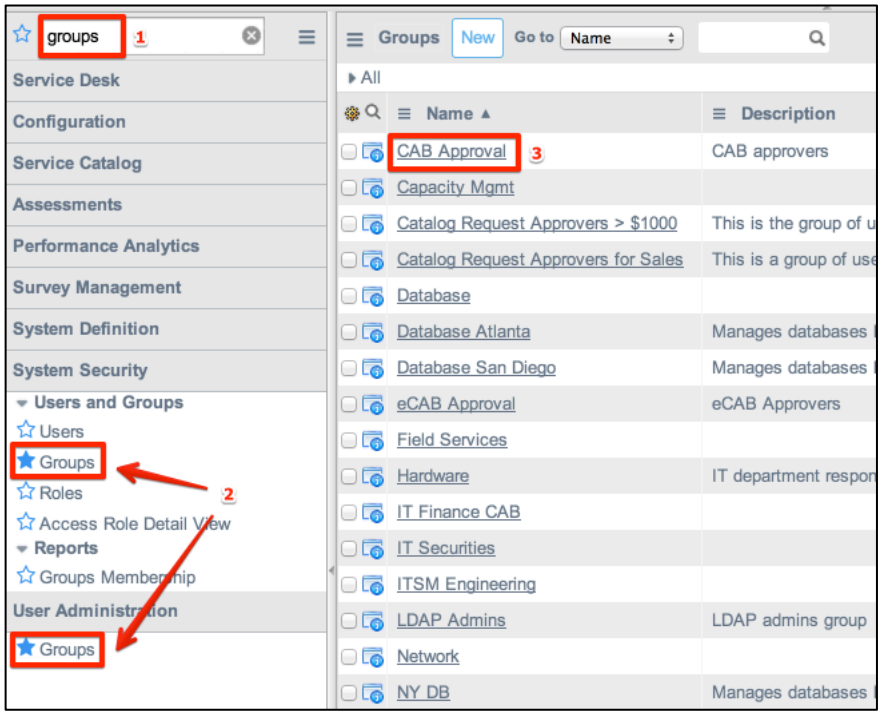
3. Create another filter with the following settings:
   - the **Title** to **Groups I am Member of**,
   - the **Table** to **Group [sys_user_group]**,
   - the **Filter** to
     - **Active is true**
     - AND **Sys ID is one of javascript:getMyGroups();**
   - and click the **Submit** button.



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Lab Success Verification

1. On this lab instance the System Administrator is not a manager of an assignment group and is member of one group, **Team Development Code Reviewers**. To make the System Administrator manager of some assignment groups,
   - type **groups** in the **Search** box of the navigation pane (1),
   - select **Groups** from either **System Security** or **User Administration** from the navigation pane (2).
   - open the **CAB Approval** group (3)**.**

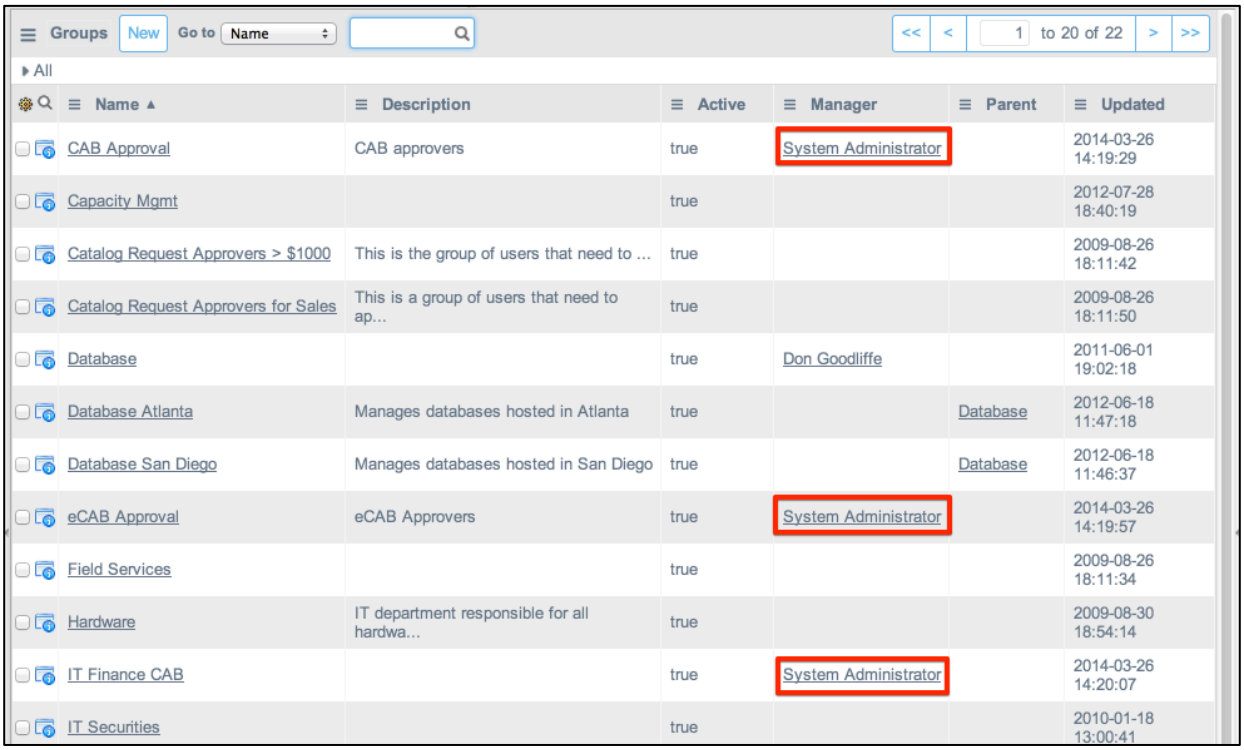


In the group form of the CAB Approval type in the manager field **system** and select **System Administrator** and click the **Update** button:



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Repeat these steps for the **eCAB Approval** and **IT Finance CAB** groups.

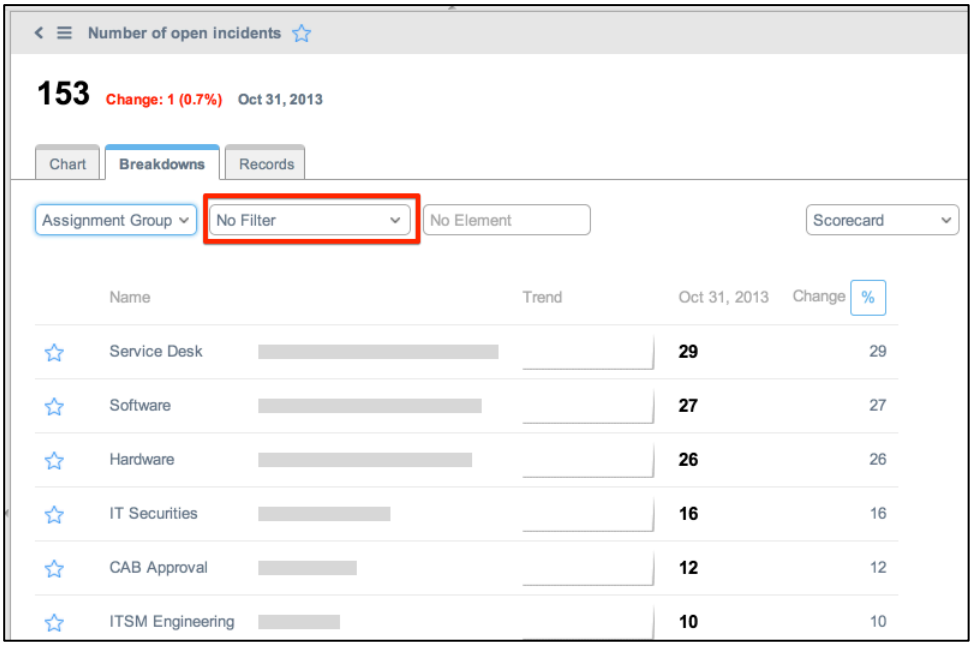


Name ▲	Description	Active	Manager	Parent	Updated
CAB Approval	CAB approvers	true	System Administrator		2014-03-26 14:19:29
Capacity Mgmt		true			2012-07-28 18:40:19
Catalog Request Approvers > $1000	This is the group of users that need to ...	true			2009-08-26 18:11:42
Catalog Request Approvers for Sales	This is a group of users that need to ap...	true			2009-08-26 18:11:50
Database		true	Don Goodliffe		2011-06-01 19:02:18
Database Atlanta	Manages databases hosted in Atlanta	true		Database	2012-06-18 11:47:18
Database San Diego	Manages databases hosted in San Diego	true		Database	2012-06-18 11:46:37
eCAB Approval	eCAB Approvers	true	System Administrator		2014-03-26 14:19:57
Field Services		true			2009-08-26 18:11:34
Hardware	IT department responsible for all hardwa...	true			2009-08-30 18:54:14
IT Finance CAB		true	System Administrator		2014-03-26 14:20:07
IT Securities		true			2010-01-18 13:00:41

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2. Navigate to **Performance Analytics > Scorecards** and click on the name of the indicator **Number of open incidents**. Click on the second tab **Breakdown**. From the dropdown list of breakdowns select **Assignment group**.

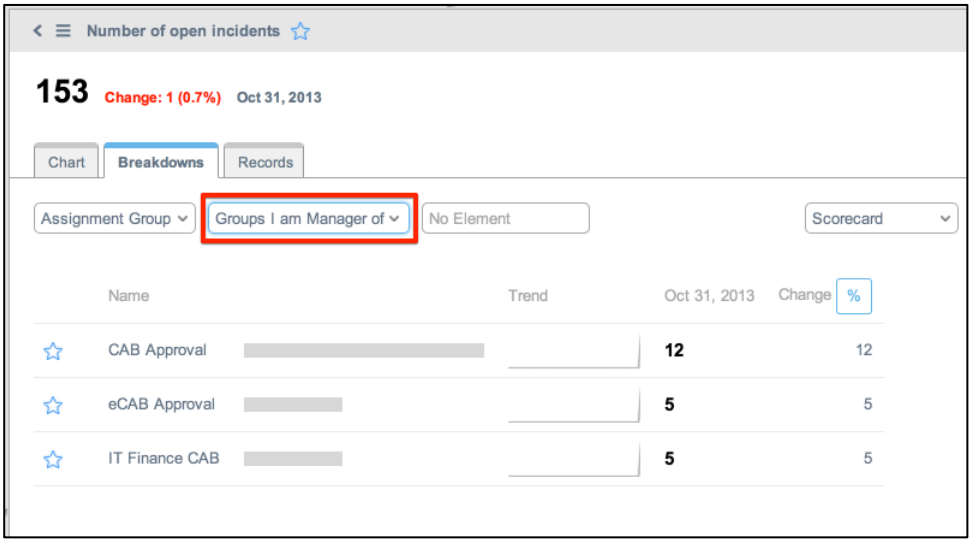
   Notice that a new dropdown list is available that shows filters and by default **No Filter** is selected. With this default value all elements show.



   If the cursor is navigated to the element fields, one of the 22 groups can be selected.

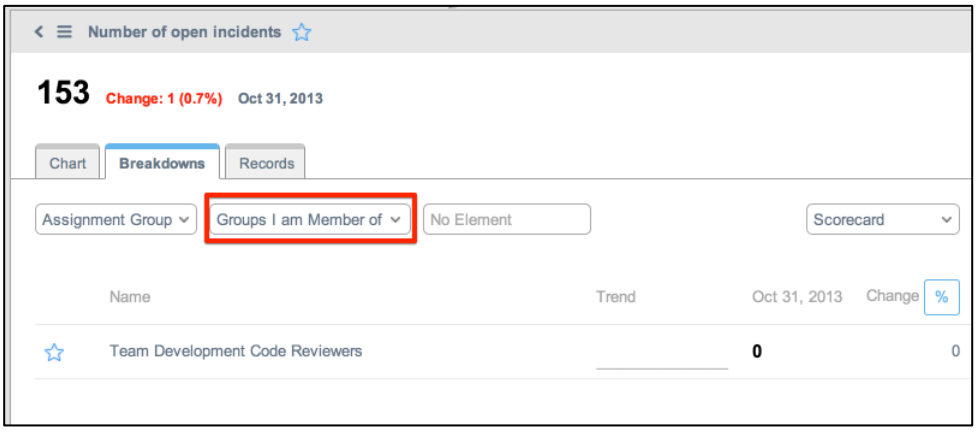
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From the filter dropdown list select **Groups I am Manager of** and notice how the breakdown elements that show is restricted to three groups:



If the cursor is navigated to the element fields, one of the 22 groups can be selected.

Finally, from the filter dropdown list select **Groups I am Member of** and notice how the breakdown elements that show is restricted to one group only:



If the cursor is navigated to the element fields, only the one group can be selected.

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