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Performance Analytics: KPIs, Scorecards & Dashboards

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Performance Analytics

KPIs, Scorecards & Dashboards

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Agenda

Introduction to Performance Analytics

Enablement

Basic Set Up

Additional Set Up

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Getting Started with Performance Analytics

- Demo of Performance Analytics

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Introduction to Performance Analytics (1/5)

- Performance Analytics supports Performance Management
- Performance Management
  - Wikipedia:

    Performance Management includes activities which ensure that goals are consistently being met in an effective and efficient manner. Performance management can focus on the performance of an organization, a department, employee, or even the processes to build a product of service, as well as many other areas.
  - Allows organizations to align their resources, systems, and employees to strategic objectives and priorities
- Performance Analytics supports Performance Management by delivering dashboards, scorecards and analytics to define, measure and improve Key Performance Indicators (KPIs)

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Introduction to Performance Analytics (2/5)

Steps for Performance Management are:

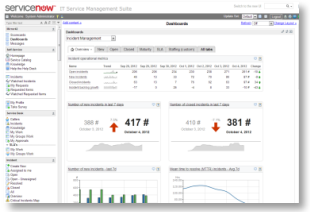
- identify the processes/activities/domains of what needs to be managed
- articulate the goals to be met
- define the metrics/indicators that measures if goals are being met
- collect the data for the indicators
- take improvement actions

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Introduction to Performance Analytics (3/5)

- Performance Analytics does not a replace reporting, but complements reporting:

Roles	Information needs	Solution
CIO Exec Team / Board	Trends and exceptions Role-based KPIs Targets and thresholds	PERFORMANCE ANALYTICS
IT Strategy IT Management	Ad-hoc reports Lists of detailed records Real-time status updates	OPERATIONAL REPORTING
Project Managers Process Managers Service Managers		





- Performance Analytics is not restricted to senior management roles!

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Introduction to Performance Analytics (4/5)

- Performance Analytics does not replace reporting, but complements reporting:

Features	Reporting	Performance Analytics
Time series reporting	on existing date fields only	on timestamps created by snapshots
Time series analytics	no	yes
Real time refresh	yes	no: daily update
Multiple series in a chart	no	yes
Formula support	no	yes
Compare against target	no	yes
Alerts and Thresholds	no	yes
Main purpose	ad-hoc & real-time reporting	automate recurring information
Main Audience	operations	senior management

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Introduction to Performance Analytics (5/5)

- Performance Analytics is designed to support Performance Management of business processes and activities
- There is no limitation as to which type of business processes and activities (IT, HR, Facility Management)
- Data of these business processes must be available in the ServiceNow instance
- Most applications available on the platform support the execution of processes Performance Analytics supports the management of these processes

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Enablement

- Paid application but there is a free, trial version available
  - For new customers the trial version is provisioned on Eureka
  - For customers upgraded to Eureka, the plugins (com.snc.pa and com.snc.pa.dc) need to be activated
- The full featured trial version
  - consists of a fixed Incident Management Dashboard with 15 indicators;
  - is locked down: one cannot add or delete indicators, and only 180 days history of scores visualized
- The trial version is configured by the customer in two basic steps
  - Check if the indicator definition matches the ServiceNow configuration
  - Schedule and enable the (daily) data collection job

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Getting Started with Performance Analytics

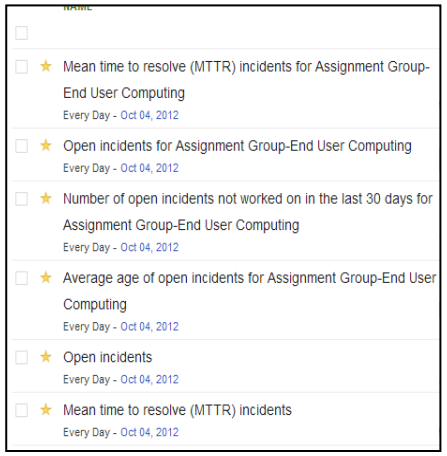
- Lab 1: Verify Instance

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Basic Set Up (1/7)

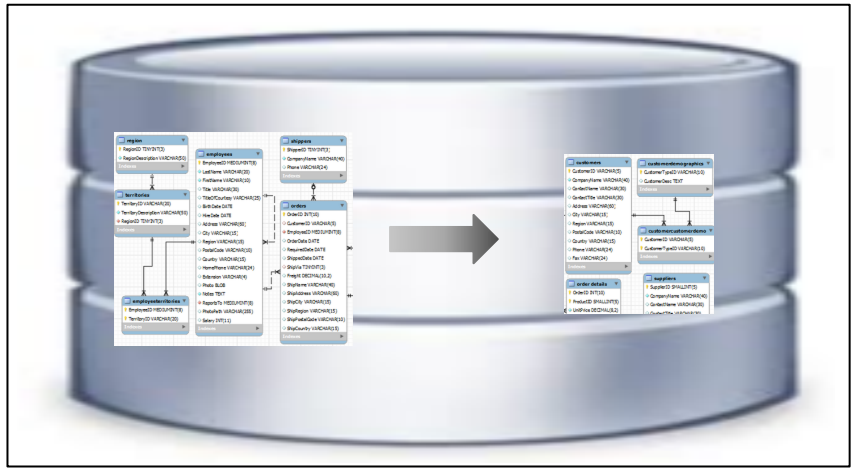
- To run Performance Analytics:
  - set up indicators
  - run data collections for the indicators, snapshot scores
  - visualize the collected data

Indicators

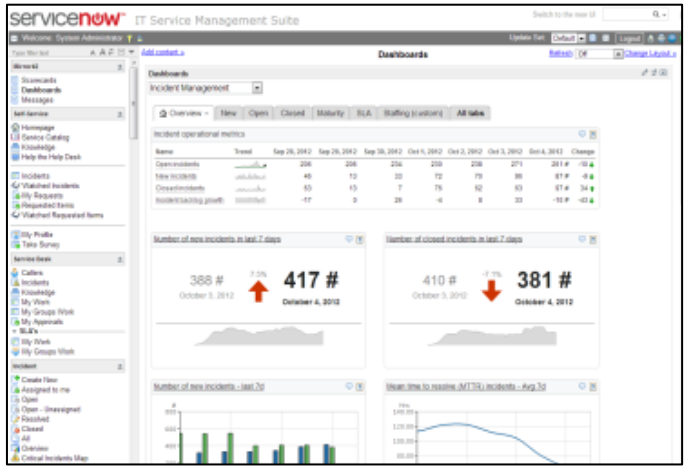


ServiceNow Operational Data

Performance Analytics Collected Data



Dashboards and Scorecards

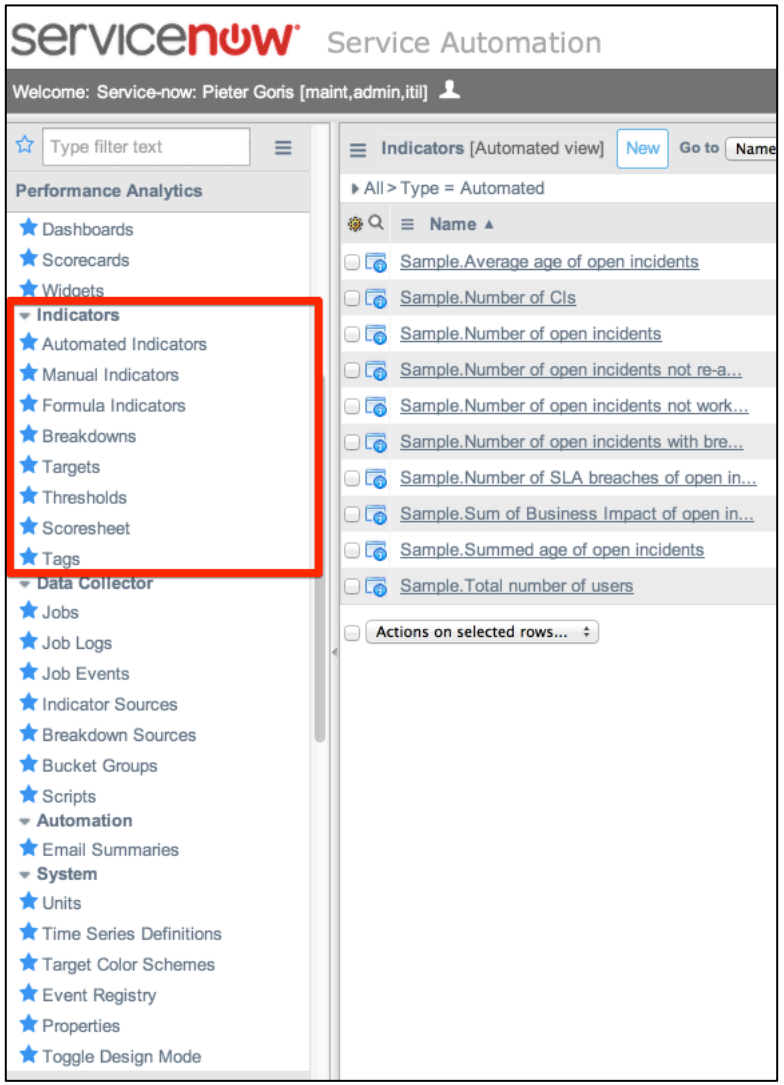


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Basic Set Up (2/7)

To run Performance Analytics – set up indicators (1/2)

- three types of indicators:
  - automated: scores will be automatically collected
  - manual: scores will be manually collected
  - formula: scores will be calculated based on the scores of other indicators
- breakdowns: break down the scores to a more detailed level, like region, service, assignment group, status, etc. (tables and choice lists)
  or
  in Performance Analytics defined groups or classes (buckets)
- targets: set quantified goals for indicators
  - can be set for any indicator in combination with a time series and/or elements of a breakdown

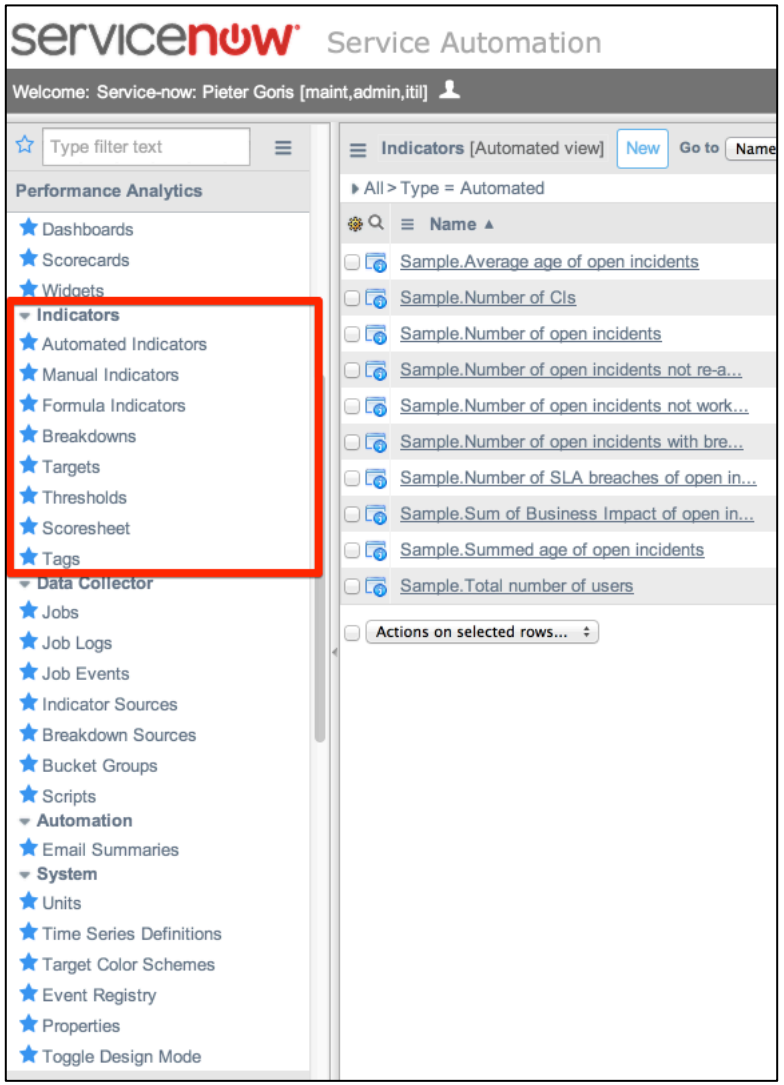


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Basic Set Up (3/7)

To run Performance Analytics – set up indicators (2/2)

- thresholds: used for exception reporting and alerting for indicators
  - Like targets, thresholds can be set for any indicator in combination with a time series and/or elements of a breakdown
- scoresheet: view or manually edit/add scores for an indicator including the scores for the elements of a breakdown
- tags: to group indicators
  - Used to quickly search for indicators or to quickly set up a dashboard for grouped indicators

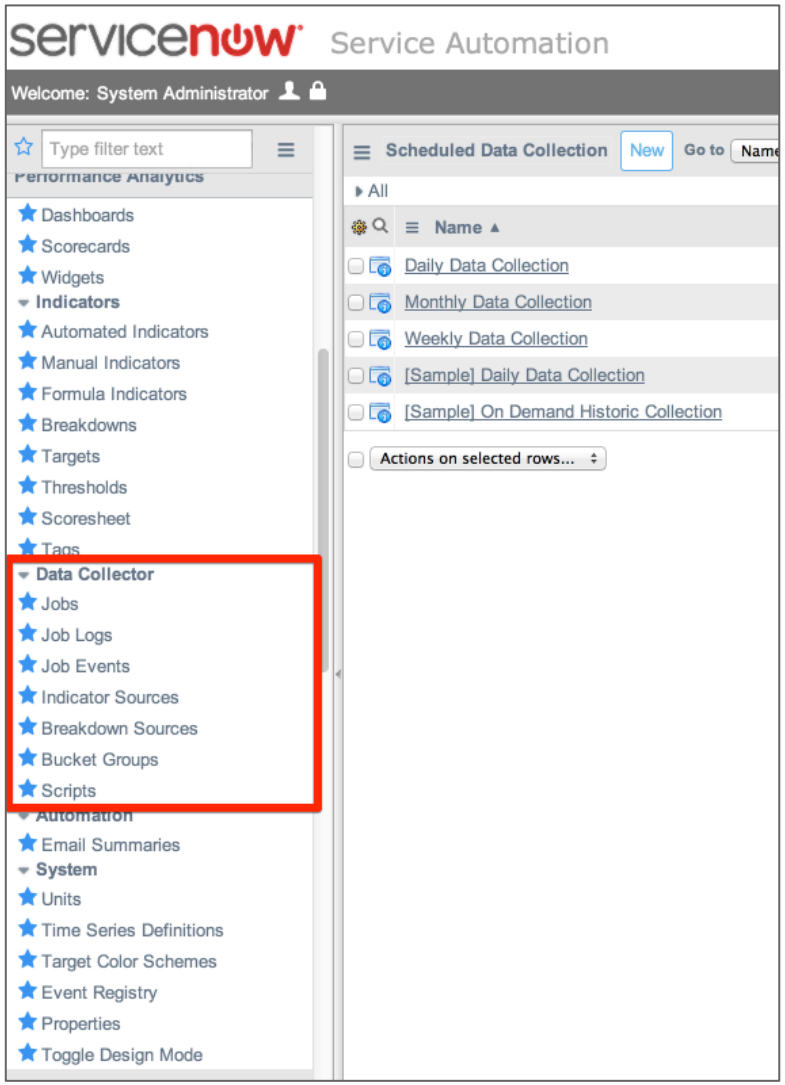


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Basic Set Up (4/7)

To run Performance Analytics – run data collection (1/2)

- indicator source: is a definition of a set of records from a table or view in the ServiceNow database and can be used with multiple automated indicators.
  - At the indicator definition an aggregation needs to be applied (count, sum, average, max, min) to the record set and if needed additional conditions.
- breakdown source: describes which elements (instances/records) the breakdown should contain and is defined as a set of records from a table or view in the ServiceNow database or a 'bucket group' and can be used with multiple breakdowns.
  - At the breakdown definition the column of an indicator table that holds the elements is selected, thus creating a relation between breakdown source and indicator.

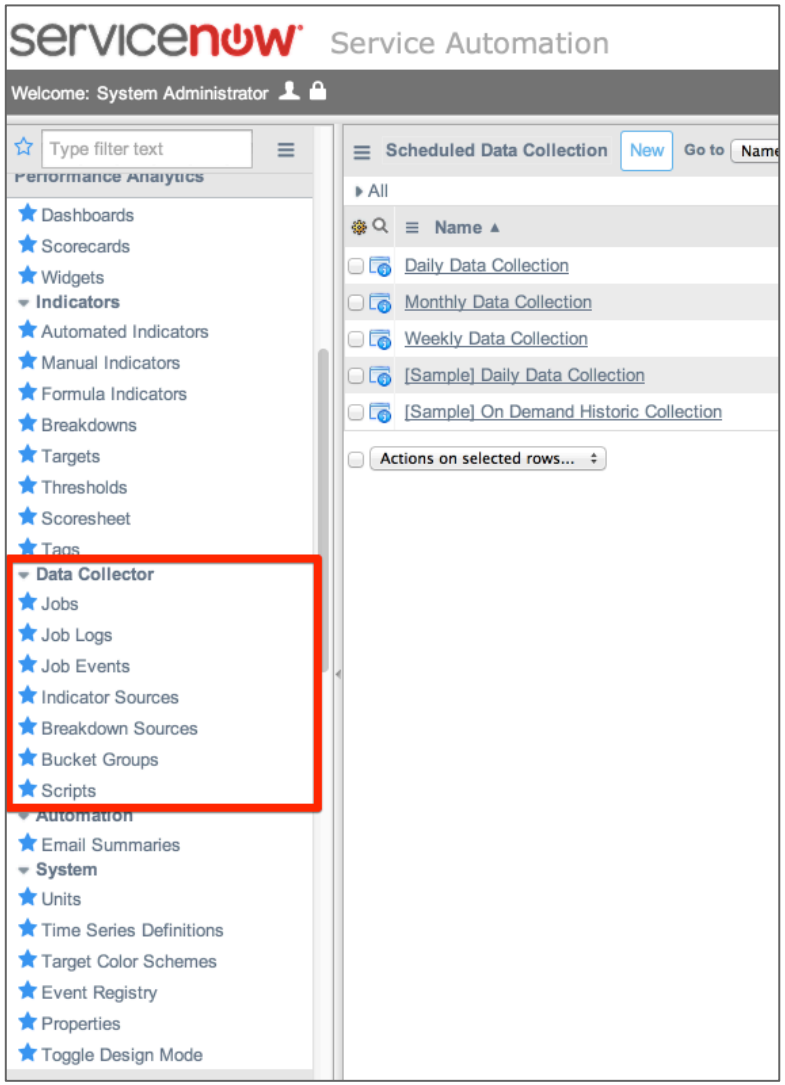


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Basic Set Up (5/7)

To run Performance Analytics – run data collection (2/2)

- bucket groups: add classifications/categories/groups that are not available in a table in the ServiceNow database on which a breakdown source can be defined
  - Buckets/elements are manually defined
- scripts: add information to a record set that is not stored in the table
  - This additional, virtual attribute can be used as condition for an indicator to further limit the record set, or as attribute to classify scores per bucket
- jobs: collect scores for the related, automated indicators for the set collection period.
  - Can be scheduled with a periodical collection interval and/or run on demand

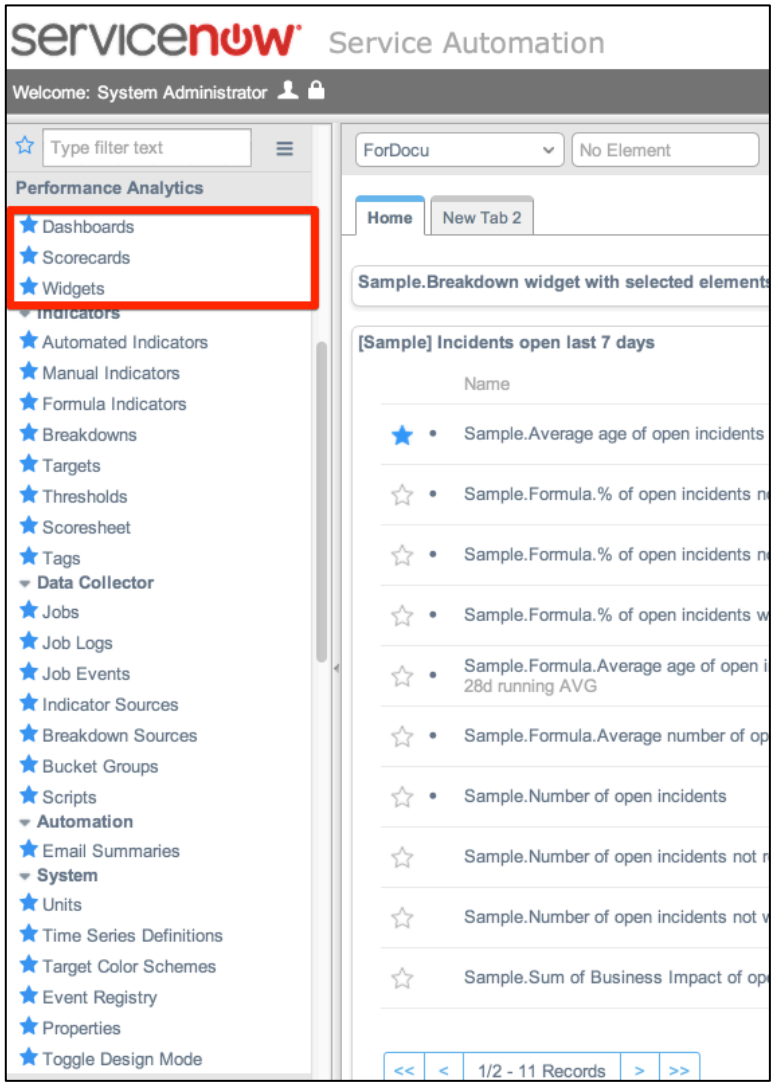


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Basic Set Up (6/7)

To run Performance Analytics – visualize collected data

- dashboards: the scores of indicators are visualized in separate boxes or widgets.
  - Can have multiple tabs which are homepages that can hold multiple gauges or widgets
- scorecards: show a list of indicators with basic score info
  - Can limit list of indicators shown
  - Click an indicator name to open a detailed scorecard to show much more information and give UI controls to the user so the user can determine how to look at the information
- widgets: show all definitions of a visualization that can be used on dashboards – Widgets are like gauges on homepages



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Basic Set Up (7/7)

To run Performance Analytics – summary basic set up

- Set up indicators
  - indicators (scores) and breakdowns (elements), indicator source and breakdown source
  - targets and thresholds (not mandatory)
- Run data collections for the indicators, snapshot scores
  - jobs (automated scores collection), manual scores collection, MS Excel imports
- Visualize the collected data
  - dashboards, widgets and scorecards

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Getting Started with Performance Analytics

- Lab 2: Run Data Collections
- Lab 3: Activate and Set Targets
- Lab 4: Activate and Set Thresholds
- Lab 5: Add Filters to Detailed Scorecards

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Additional Set Up (1/4)

Authorizations (1/2)

- Application menu level authorization: four Performance Analytics roles



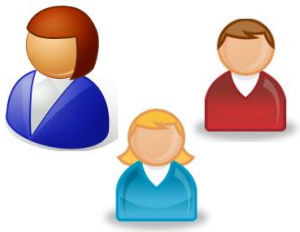
PA Administrator
Creates indicators, formulas, thresholds, targets, adds breakdowns, applies aggregates, and creates and edits dashboards. Can change system configuration.



PA Power User
Same as PA administrator but cannot change system configuration, or alter data collection jobs.



PA Data Collector
Has access to tasks in the Data Collector menu – create and edit data collection jobs, view job logs, define and edit indicator sources, breakdown sources, bucket groups, scripts.



PA Viewer
End users – can access one or more dashboards based on access rights.

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Additional Set Up (2/4)

Authorizations (2/2)

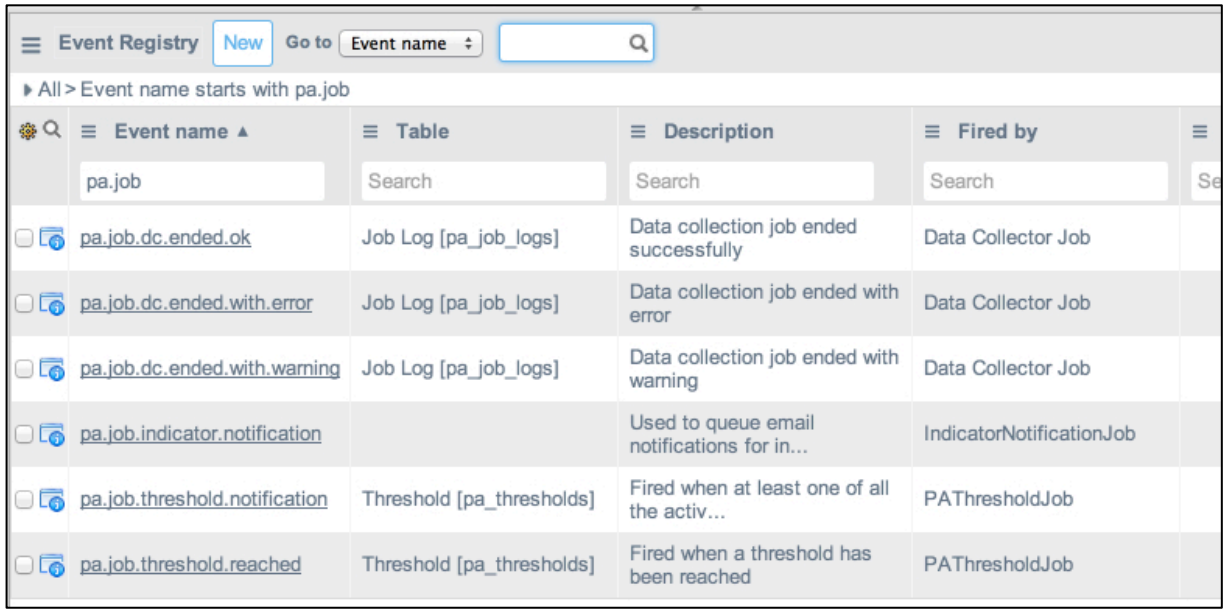
- Record level authorizations: access restrictions can be set to all available roles on:
  - Dashboards: access is set to dashboards, not to tabs
  - Indicators in lists of scorecards: if access to an indicator is restricted for a role, the indicator will not show in the scorecard list
    - But if the same indicator is shown on a dashboard to which the role does have access, the indicator will be available and accounts with that role can zoom into the detailed scorecard
  - Elements: on breakdown sources restrictions can be set using blacklists or whitelists
    - When using a blacklist, the roles on that blacklist cannot view the selected elements
      - All other roles can view all the elements
    - When using a whitelist, only the roles on the whitelist can view the selected elements
      - All other roles cannot view any element

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Additional Set Up (3/4)

Notifications

- Work on events and only to ServiceNow users
- Available events:
  - collection jobs outcome
    - *successful*
    - *with warnings*
    - *with errors*
  - thresholds met
  - indicators on a time schedule

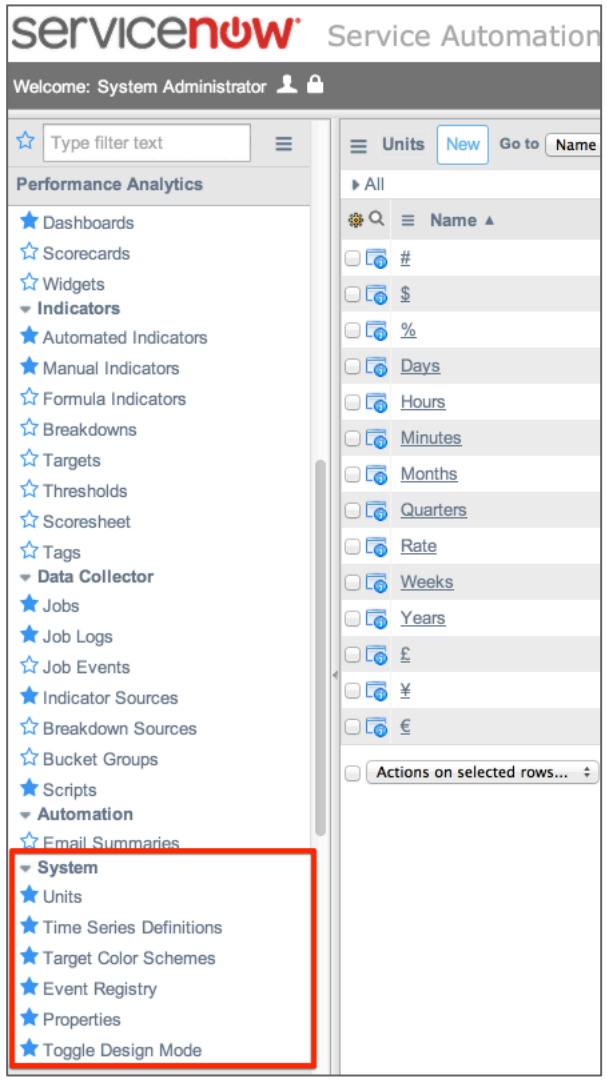


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Additional Set Up (4/4)

System Properties

- Settings for units, time series definitions, target color schemes, several ‘number of elements’, data collections, etc.
- Accessible from the ‘System’ menu within the Performance Analytics application
- There is also one non-Performance Analytics system property setting used, glide.ui.filter.first_day_of_week, which determines the first day of the week. By default that value is ‘2’, i.e. ‘Monday’



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Top Takeaways

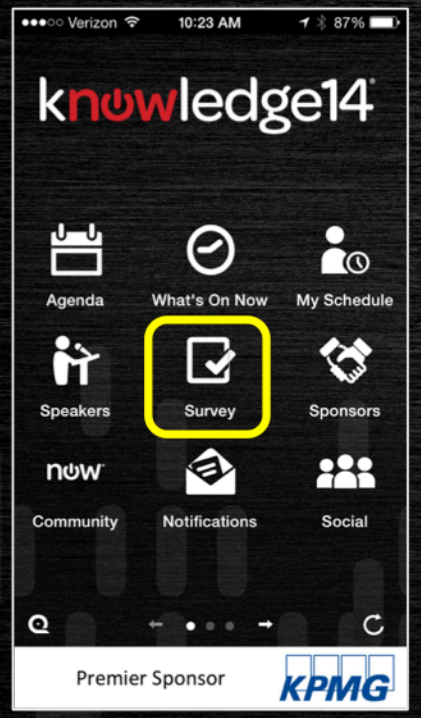
1 Performance Analytics Supports Performance Management and Complements Reporting

2 A Free, Full Featured Trial Version is Available

3 Up and Running in Hours

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Thank You

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