knowledge14
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Lab Guide

Reporting 201:

Building Killer Dashboards

Neil Morris & Ryan Fraser

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

Login / Passwords:

admin / Knowledge14

itil / Knowledge14

employee / Knowledge14

Lab Goal

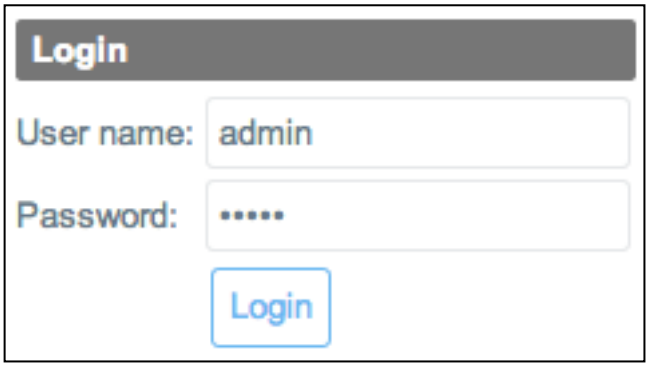
Any ServiceNow Executive Dashboard should have a Business Service component. In this first lab, you will be creating the background data that will make up your dashboard. By building these out, you'll get familiar with the underlying data and structure of these business centric reports. In most organizations, this will be net new data and will require you to turn on new plugins.

Lab 1
Creating a Business Service

Log on to Your Training Instance

1. Your instance URL is on the cover page.

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



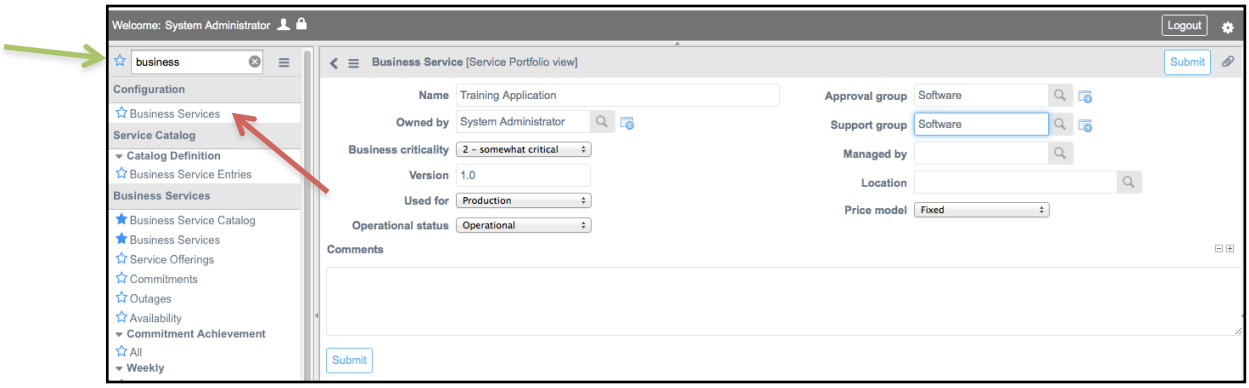
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Create a New Business Service:

1. Enter **Business** in the Type filter text field to reduce the list of visible links.

   Hot Tip: Use the navigation **Type filter text** field (Green arrow, below) to find new or rarely used applications. Also, click the Lab titles to be directed to the ServiceNow Wiki.

   Click the **Business Services** module under the **Configuration application**.



   NOTE: In subsequent labs, these steps are abbreviated to **Application Name > Module Name**.

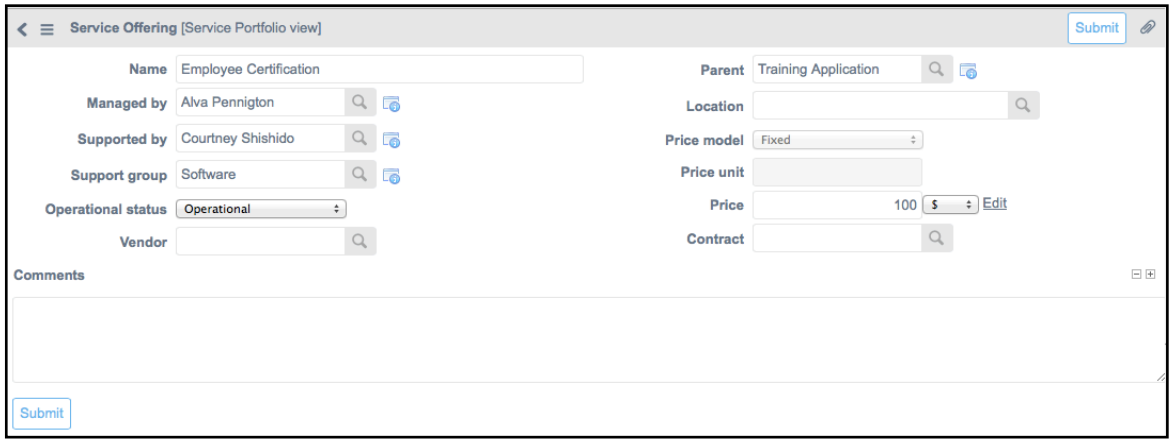
2. Right click the **form header** and select **Save** to expose additional fields.

   NOTE: At this point, it isn't necessary to copy the entire configuration above. The metadata around a **Business Service** is used to drive automation for notifications, change processes, etc.

Hot Tip: Look at the **Business Service Catalog** on the left navigation pane. This is definitely a Business Centric view of the products and services IT delivers. You are already on track to present to your CIO!

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3. Add a **Service Offering** to the created **Business Service**. The **Service Offering** tab will be on the bottom of the **Business Service** form.

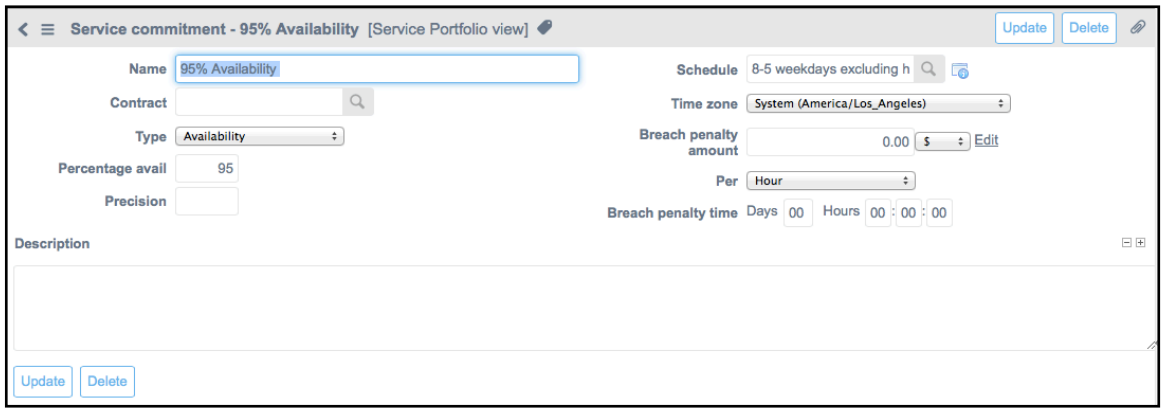


Again, you can use whatever metadata you want. Select **save** so you stay with the **Service Offering**.

Hot Tip: This is first time we are seeing *cost* (price) in the mix. This will be used later for generating an expense line for this service. Pass GO, ‘er Price per Unit and collect $200!

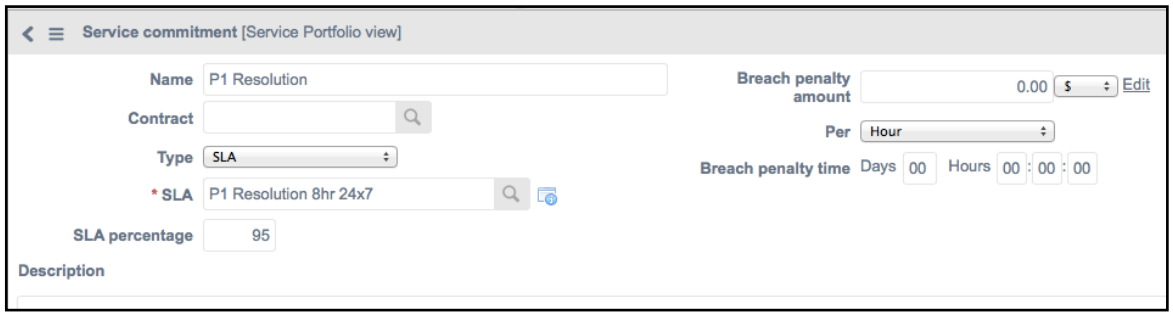
4. Add an **Availability Service Commitment**. This is located in a tab on the **Service Offering**. If you landed back at the **Business Service**, click through and make your way back.

   Select some level of availability and choose a schedule that the instance will calculate from. The **Precision** field allows you to track to a decimal point (**99.999**).



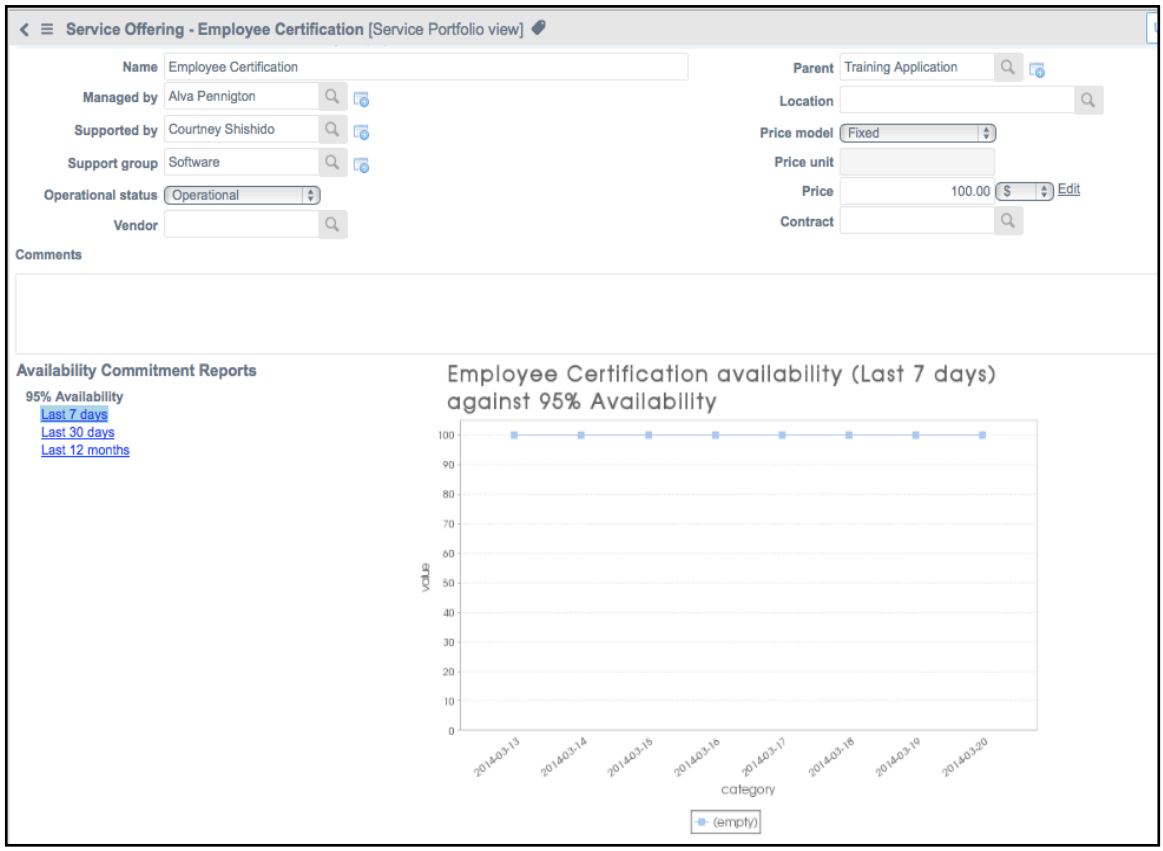
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5. On the same Service Offering, add an **SLA** Service Commitment.



Hot Tip: Take a look at the **Service Commitment Types**. SLA, Availability and Maintenance Windows are all used in system processing. SN calculates those automatically!

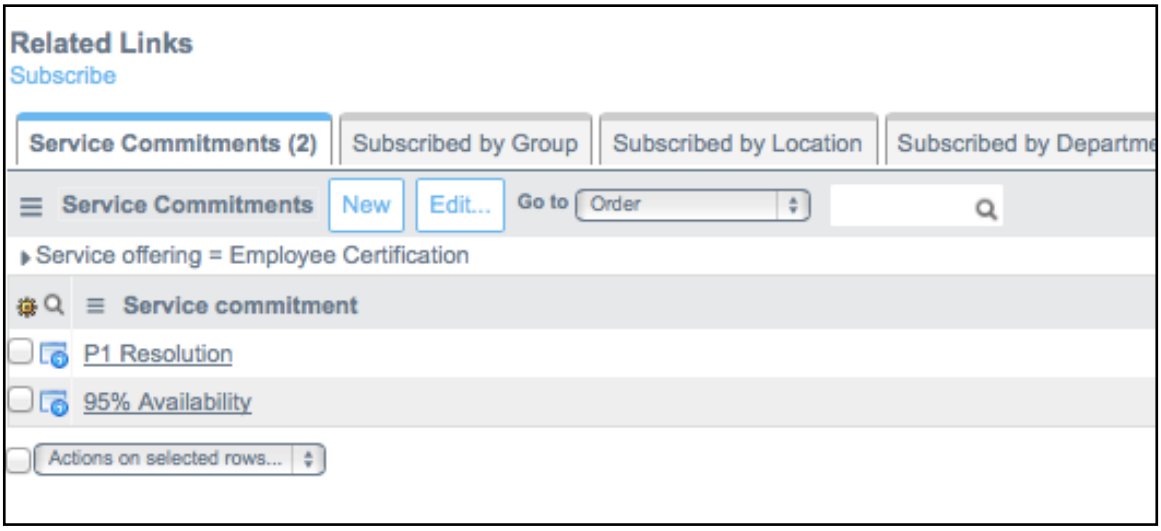
Save both and you should be back at the **Service Offering** page. The Availability should be 100%. Celebrate while you can; no service stays available 100% for long!



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6. Subscribe to the newly created **Business Service**.

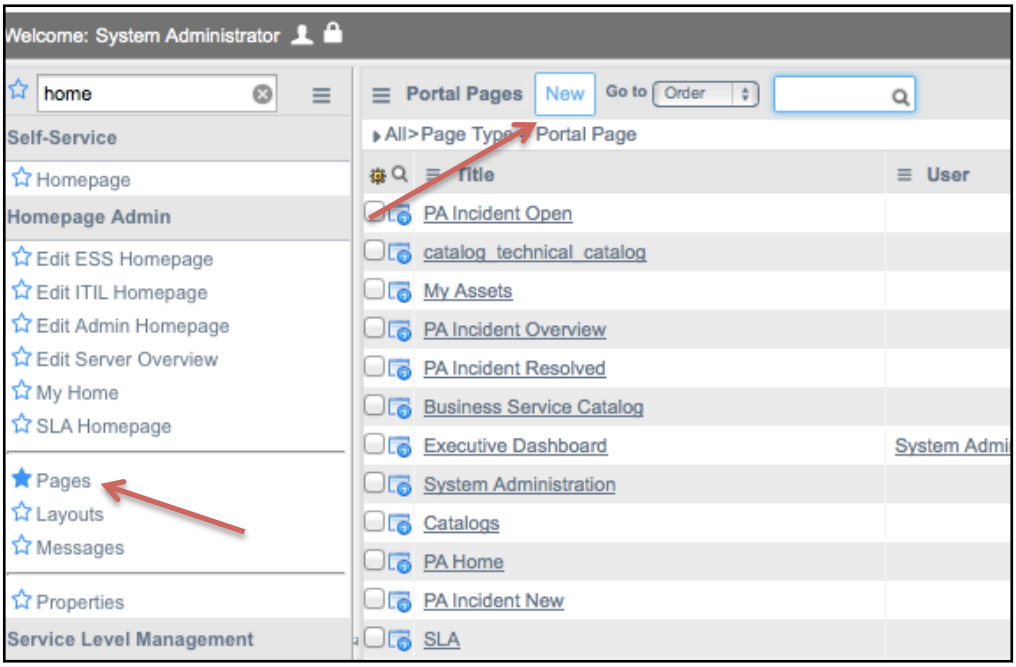
   Select the **Subscribe** button and double check that you show up in the **Subscribed by User** tab.

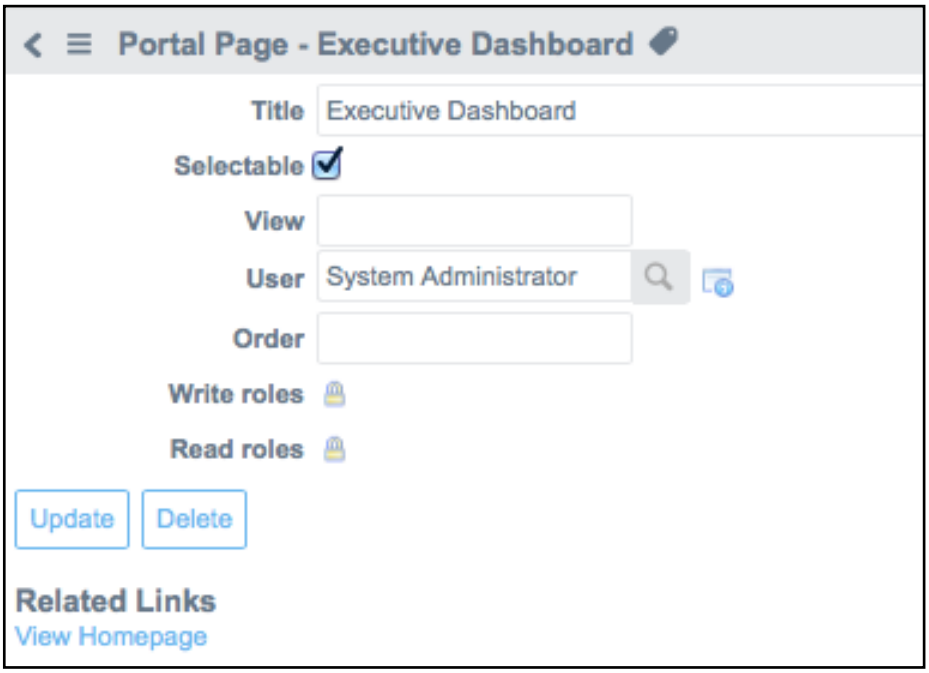


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7. Create a new Executive Dashboard:

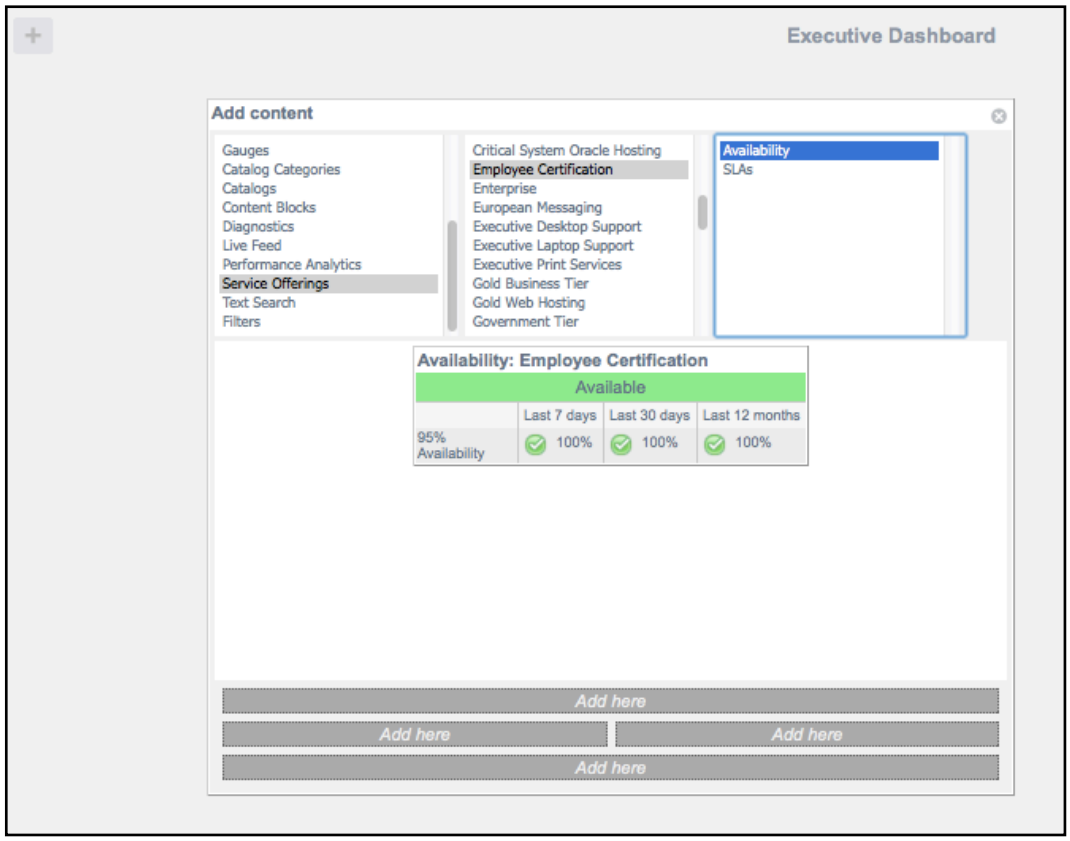
   Select **Switch to Page** and then **New Page**. I named it Executive Dashboard, but get creative. No one will judge - down with censorship!





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Select **Add Content** and then **Service Offerings**. I chose the Service Offering I just created in the left column and another random Service Offering for the right column. Again, use your imagination and tweak it as you go along.



How does the new Dashboard look? Everything should be green and happy. More celebrating!

Hot Tip: If you're about to raise your hand and tell us that the real world isn't always green, go ahead and create an outage on the service. All you have to do is right-click the green space (arrow, above) and create some drama. Since you brought up the real world, outages can be created by any task, monitoring tool, automated process, etc.

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Takeaways

Business Services are part of a larger concept and are the basis for the *Service Centric* or *Shared Service* models. This is how IT aligns with the business. For example, you will be able to correlate people, assets, support and project costs up through the *Service* that IT provides. Common examples are Applications, Capabilities and Processes.

You should now be familiar with Business Services, Service Offerings and Service Commitments. Take a moment and think about an example from your own organization.

What data components could you plug into a Service? Assets and their relationships? Availability or other SLA's? Owners and subscribers to those services?

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Lab Goal

Lab 2
Firing up Financial Management

The Financial Management (FM) module is used to track costs for virtually any asset, contract, activity or process inside SN. Since we've already established that cold, hard cash is probably important to a CIO, this is where we'll focus next. There are examples in the core demo data for every type of cost, so you should have plenty of examples to work from.

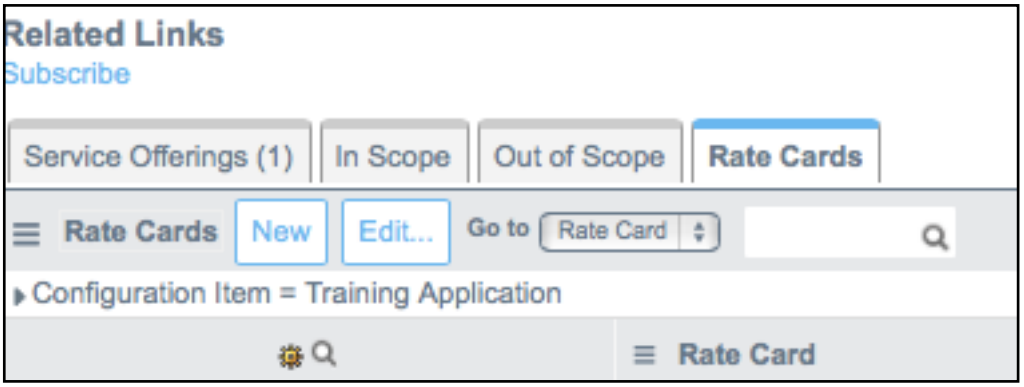
We're going to add some Rate Cards, which will help us to group related expense lines together. We have CI, task and labor rate cards that we can pull together to see the total cost for a Business Service.

At the end of this lab, we should be generating costs for our new **Business Service**. We will have identified the CI's that provide the service, the support costs per hour and how we will distribute the costs back to the business. Lots to do!

Hot Tip: You can see how important good data is in the system. Just like the metadata around a **Business Service** can help automate ITIL processes, good CMDB data can feed modules like Financial Management (FM).

Part 1 – CI Rate Cards

1. We need to create a CI Rate Card for our new Business Service. Navigate to your new **Business Service** and select the **Rate Card** tab. You might need to add it to the **Related List**.



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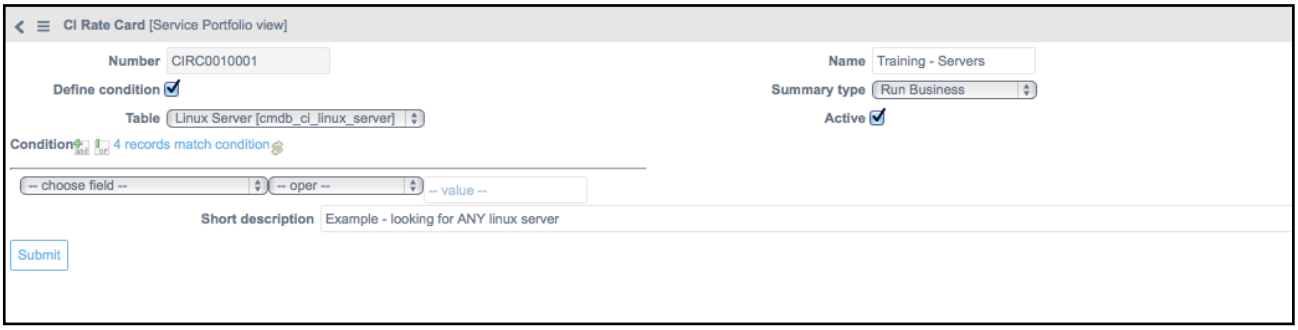
2. Click the new button and enter a name and short description for the card.



Set the condition for the rate card by selecting the **condition** check box. Here's where it gets interesting. What will you use to identify the equipment attached to the **Business Service**? I added a filter to look for any Linux Server. In your instance, you would want to look for another piece of info from the metadata. Keywords, short descriptions or custom fields all work well here.

Right click and **save** this record. Good work, we're getting closer.

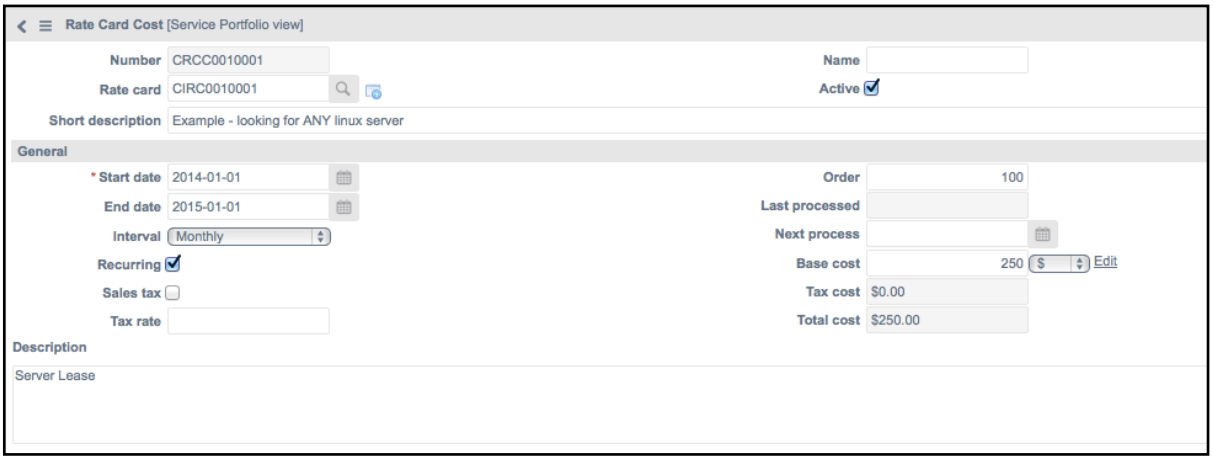
3. Next we need to define the **Rate Card** cost. From the **CI Rate Card** form, select the **Rate Card** tab and select **New**.



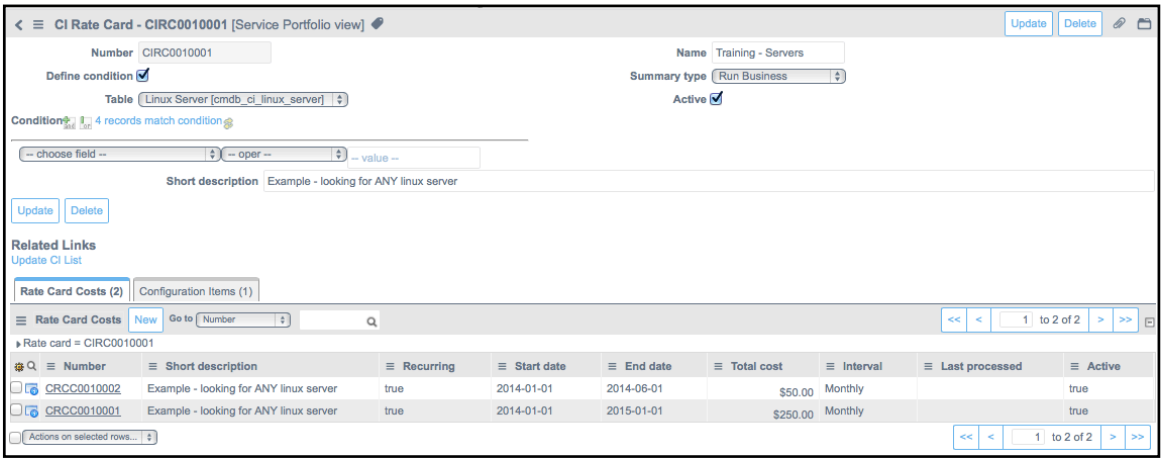
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Select a start, stop and recurring monthly configuration. Add whatever cost you like. I made this a generic server lease cost. Lots to fill out, here. Take your time and look at the options available. **Submit** this one and let's add another.

Hot Tip: Cost data is normally provided by the Finance Department. Sometimes you have to back into this number from a large bucket of budget data.



You should now have a **CI Rate** card with two **Rate Card Costs.** You should see something similar to the image below. These cards will generate expense lines according to the interval you selected.



Hot Tip: Obviously, the more accurate you can be around cost the better.

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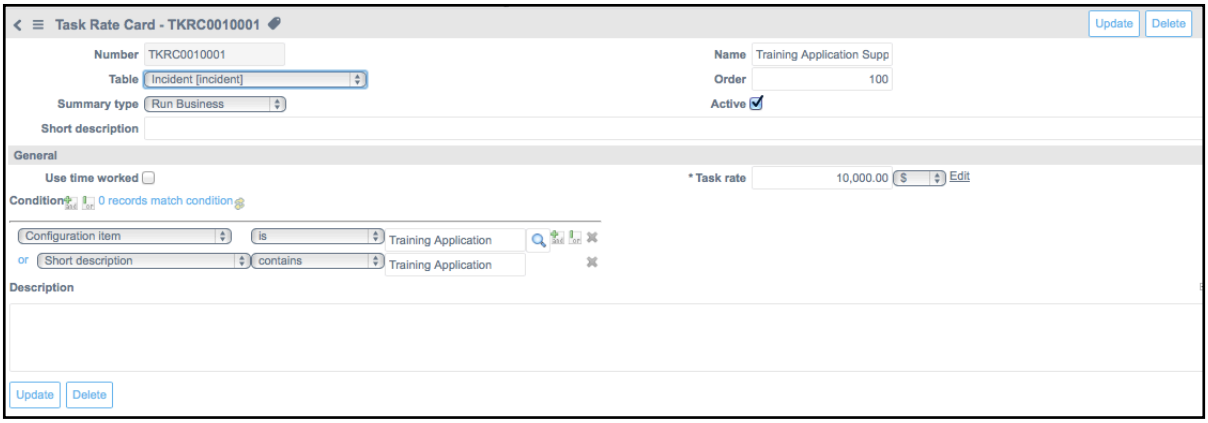
Part 2 – Task Rate Cards

Now that we have the CI's generating expenses, let's add some **Task Rate** cards. These will allow us to charge a flat hourly rate for support against our *Business Service*.

1. Navigate to **Task Rate Cards** and select **new.**

   We are looking for Incidents related to our **Business Service** and will charge a flat rate of $10,000 per hour to support. Take a look at the image below and create a rate card that is similar. We're using an outrageous number because we want it to generate a ton of cost and show up on all the reports.

   Hot Tip: Use the condition checker to see if your condition query is working. It will even show you the resulting records.



2. Create two new Incidents w/ your **Business Service** in the ci or short description field. Make sure to fully close each one out. The instance will generate multiple expense lines for each. There are other rate cards already in the system that may fire as well.

3. Navigate to **Business Services** and select your **Business Service**. You will see expense lines start to generate and be populated in the **Expense Lines** tab. You may need to add that related list.

   You have now created a very basic cost structure for our **Business Service**. The FM module uses data you already have and makes it more useful. Let's create a report to add to our Executive Dashboard.

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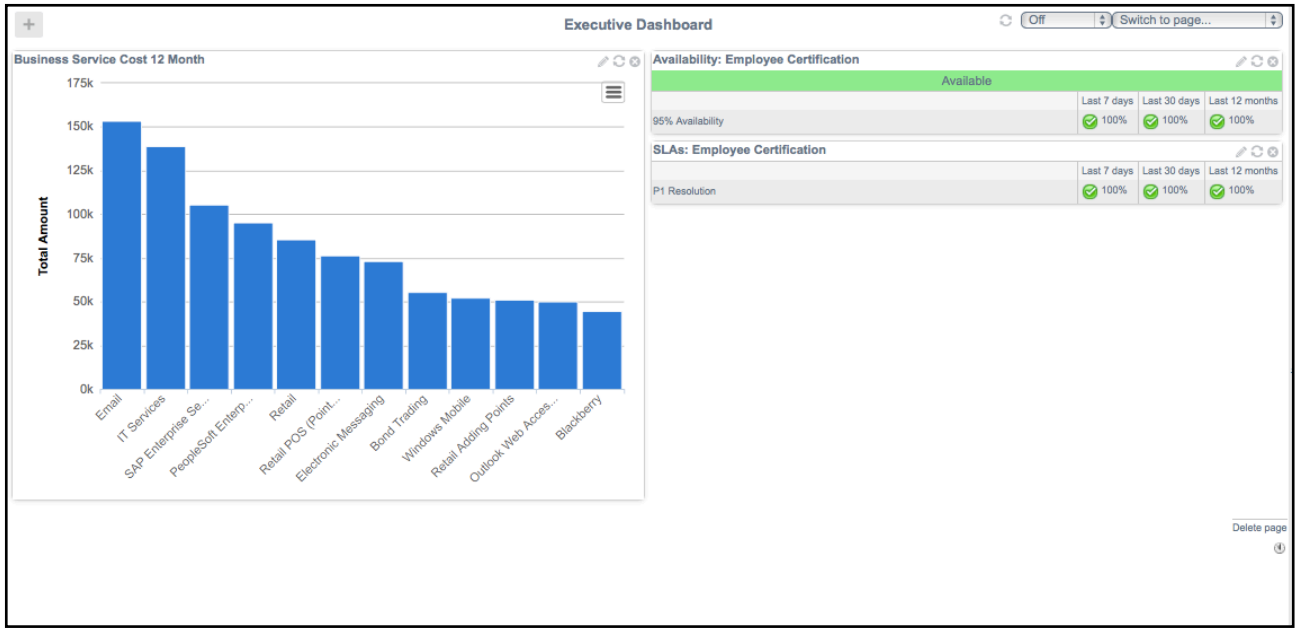
Part 3 – Business Service Cost

The FM module has some demo data already loaded up by default. The report we want is already available to you, but let's look at it and add it to our Executive Dashboard.

1. Navigate to Reports and Select Top Business Service Cost 12 months.



2. You should now see your new *Business Service* and whatever costs you've generated. Select **Add to Homepage** and time a second to think about how you could use this in your organization.



Takeaways:

The FM module is a massive piece of the solution and allows for task rates, ci rates, labor rates, allocation and distribution rules, cost center and budgeting along with asset depreciation. We've just scratched the surface of this guy!

NOW what's next?

Financial (cost) Management is obviously a large project and will take some buy in to get rolling. It **is** possible to add just a labor or task rate card, to see what the data would look like. You could use this to gauge interest in this project. I've seen that approach been successful in some organizations. Once you start to show Finance folks some of these outputs, they tend to find resources to help out.

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Lab Goal

Where is the work around the conference area? Knowing where the work is can be very helpful information. Areas with multiple incidents maybe showing a geographical problem, or being able to decide which agent carries out the work.

In this lab we are going to add a map to the dashboard, the map has already been created for you but we need to go through several different steps to allow us to get the map on the homepage.

Lab 3
Where is the work?

In the first step in the lab we are going to create a UI page with the script included. We then will go and create a widget to allow us to select the map on the homepage.

Instructions:

1. Navigate to the UI pages and then **Click** new on the list.

2. Add the **HTML** below to the UI page, set the Name to be **render_gadget_SF_Critical_map** and then press **Save**.



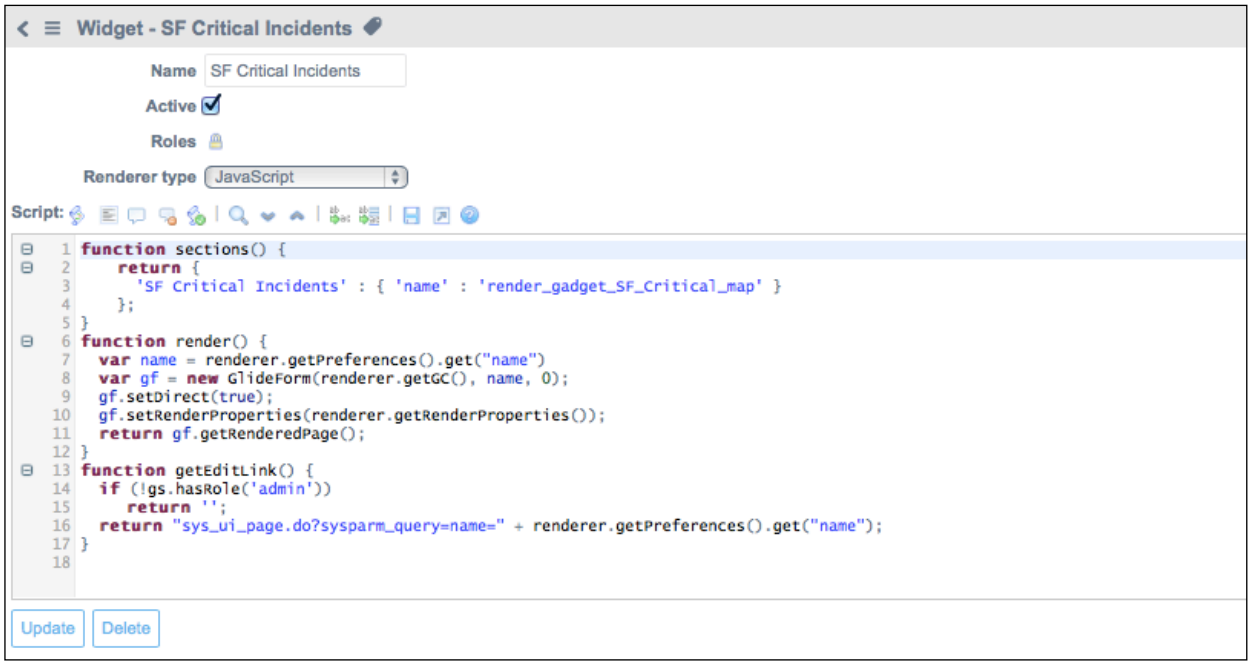

```
<?xml version="1.0" encoding="utf-8" ?>
<j:jelly trim="false" xmlns:j="jelly:core" xmlns:g="glide" xmlns:j2="null"
xmlns:g2="null">
   <iframe id="myframe" src="map_page.do?sysparm_name=SF Critical
incidents&amp;sysparm_userlocation=true" scrolling="yes" style="height:450px;
width:100%"></iframe>
</j:jelly>
```

3. Note **SF Critical incidents** is the name of the map page we are using here – go and have a quick look at the Map in the system.

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4. We now need to create a Widget to render the UI page on the Home page. Navigate to **Widgets** and click **New**.

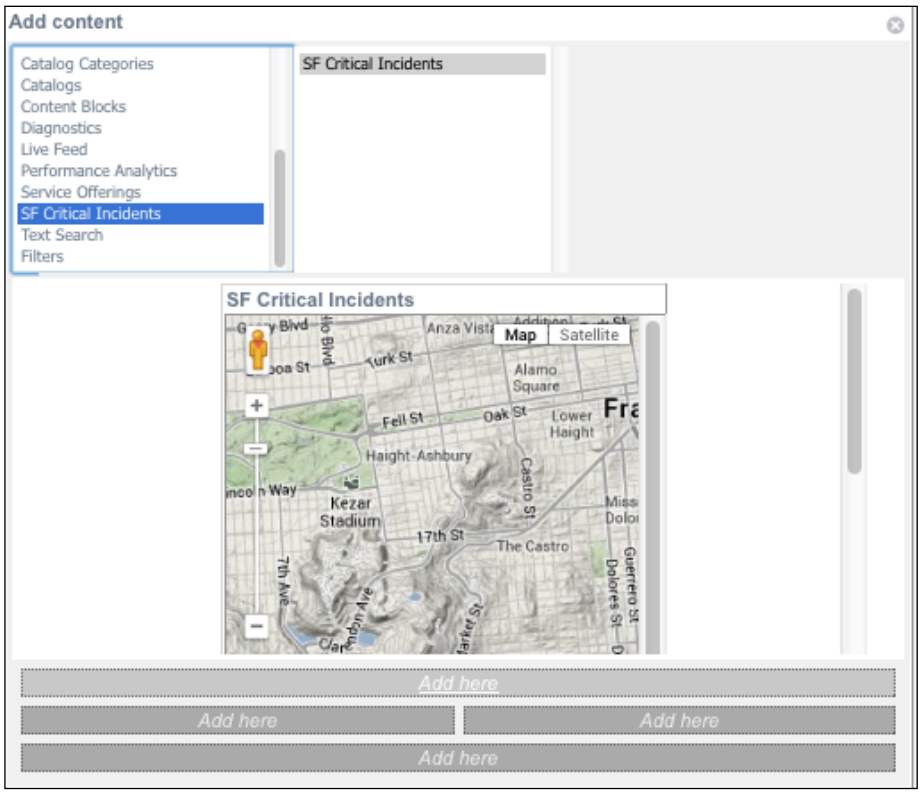
5. Enter the script provided in the scipt below, set the name to **be SF Critical Incidents** and the Renderer type to be **JavaScript**.




```
function sections() {
    return {
      'SF Critical Incidents' : { 'name' : 'render_gadget_SF_Critical_map' }
    };
}
function render() {
  var name = renderer.getPreferences().get("name")
  var gf = new GlideForm(renderer.getGC(), name, 0);
  gf.setDirect(true);
  gf.setRenderProperties(renderer.getRenderProperties());
  return gf.getRenderedPage();
}
function getEditLink() {
  if (!gs.hasRole('admin'))
     return '';
  return "sys_ui_page.do?sysparm_query=name=" +
renderer.getPreferences().get("name");
}
```

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6. **Save** the Widget and then navigate back to the Homepage we are working with. Select **Add Content** and then select **SF Critical Incidents**. Add the widget to the bottom of the screen.



7. Navigate to the Incident management application and create 2 incidents, set both too having both the “impact” and “urgency” fields to high making the priority “Critical”. Set one location to “LandsEnd” and the other to “BayView”

8. Go back to your new homepage and check that the incidents appear on the map.

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Lab Goal

Lab 4 Add a Response KPI?

How long did it take for one of our technicians to respond? This question and others similar ones that get asked are "**Key Performance Indicators** (KPIs), and they may be linked through to contracts that we have committed to or other 3rd parties have contracted. Not all the required KPIs can be measured using the standard reporting out of the box. But ServiceNow has a wonderful feature called metrics which allow us to decide what we want to measure and then start to capture this information.

In this lab we will add a new field to the incident screen and then define a metric to measure the new response KPI that we need to track. We can then create a new report against this metric and add it to the new homepage.

Instructions

1. Navigate to the Incident table. Right click and select personalize form

2. Add a new True/False (Boolean) field called **acknowledged**.



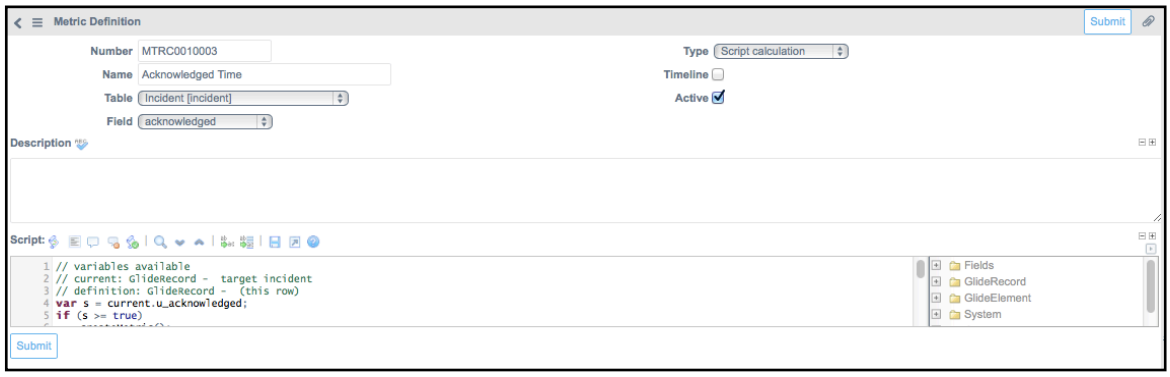
3. Move the field up on the screen where you want it and save the form.

4. Navigate to Metric Definition, click **New**.

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5. Set the following parameters:

   Table = **Incident**
   Field = **Acknowledged**
   Type = **Script**

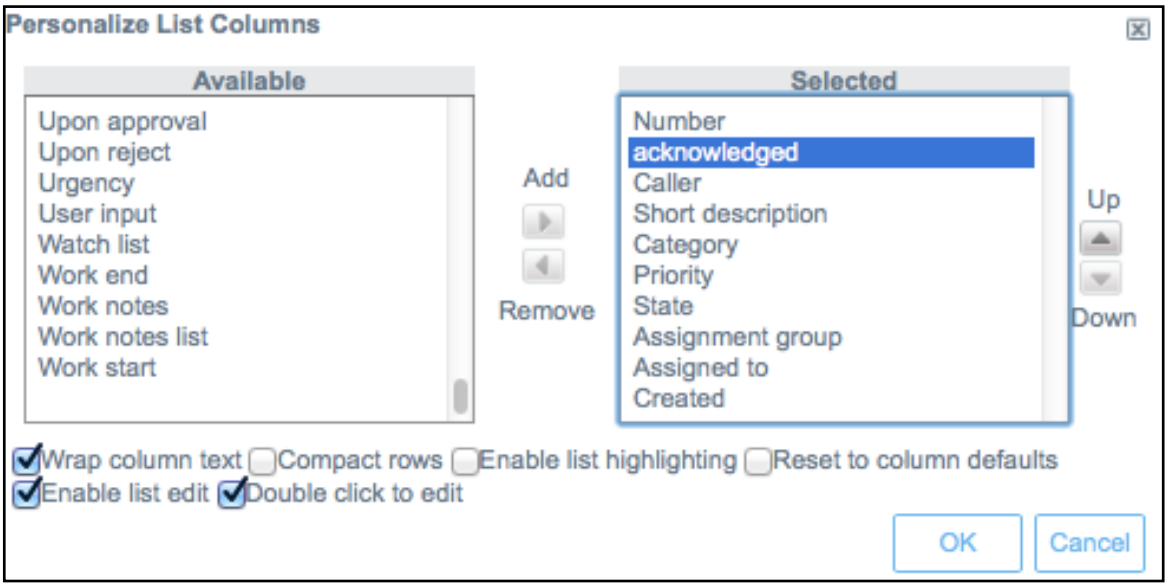


6. Enter the information above and the script provided below.

```
// variables available
// current: GlideRecord -  target incident
// definition: GlideRecord -  (this row)
var s = current.u_acknowledged;
if (s >= true)
    createMetric();
function createMetric() {
    var mi = new MetricInstance(definition, current);
    if (mi.metricExists())
        return;
    var gr = mi.getNewRecord();
    gr.start = current.sys_created_on;
    gr.end = current.sys_updated_on;
    gr.duration = gs.dateDiff(gr.start.getDisplayValue(),
gr.end.getDisplayValue());
    gr.calculation_complete = true;
    gr.insert();
}
```

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7. Add acknowledged to the list view of the incident form.



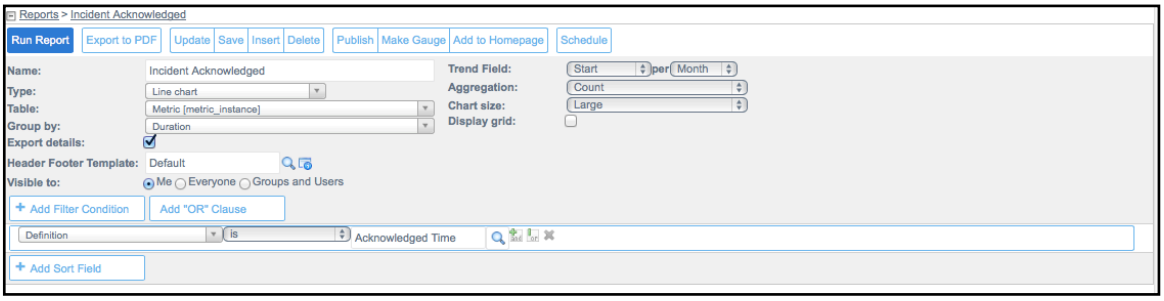
8. Mass-select some to be set to **true** to get some metric data.

9. Now we need to report against the Metric.

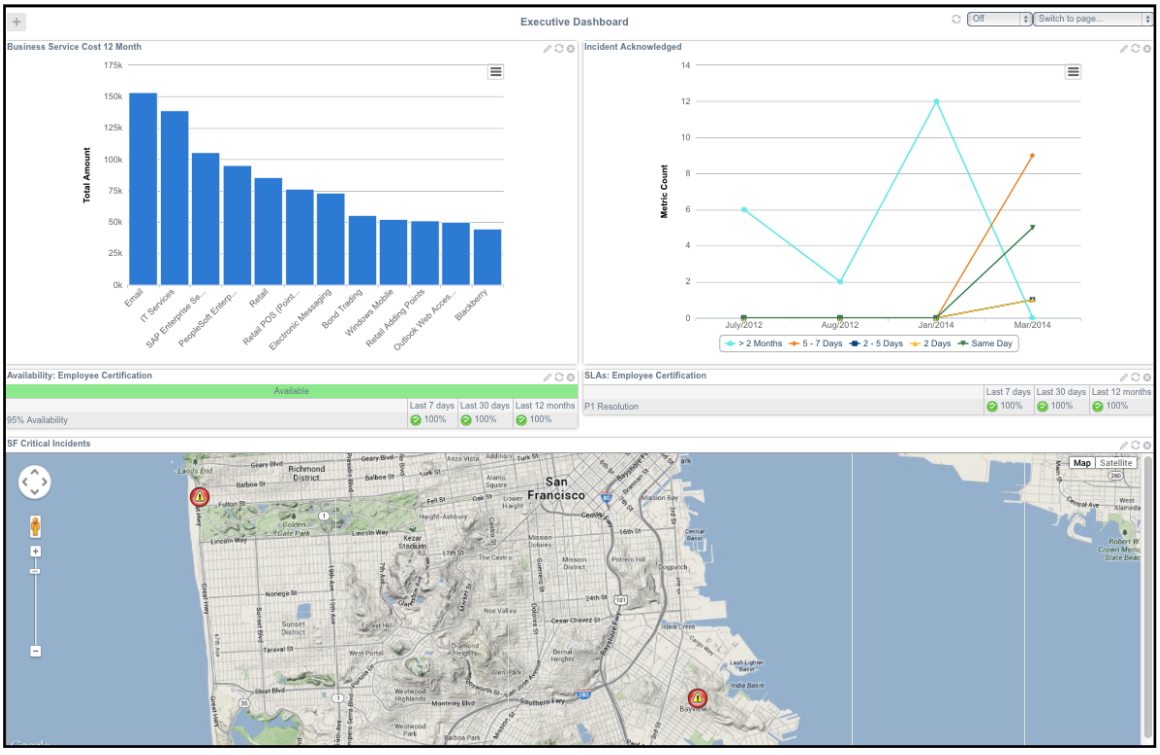
10. Navigate to Reports and create a new one.

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11. Set the following parameters:
    Type: **Line Chart**
    Table: **Metric**
    Group by: **Duration**
    Field Trend: Created
    per: **Year**
    Filter by Definition: **Acknowledged Time**



12. Then use the **make a gauge** option: Navigate to the Executive Dashboard and add the gauge. Now we should have a killer dashboard.



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Takeaways:

Metrics are a great tool in your arsenal to enable you to capture the KPI's that your business needs to measure for contractual or constant improvement programs. Look at the other metric definitions there including the First Call Resolution metric. Every company has a slightly different definition of what is a first call resolution and this allows you to change the metric to be measuring the correct definition.

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Lab Goal

Should all users see this killer dashboard? Normally the dashboard has been created for a certain set of users or roles. We can use the role based security model of the ServiceNow application to limit the users that sees the dashboard.

In this lab we are going to add a role to the homepage and make it selectable. We are then going to test this by logging in as a separate user and checking that we cant see the homepage any more.

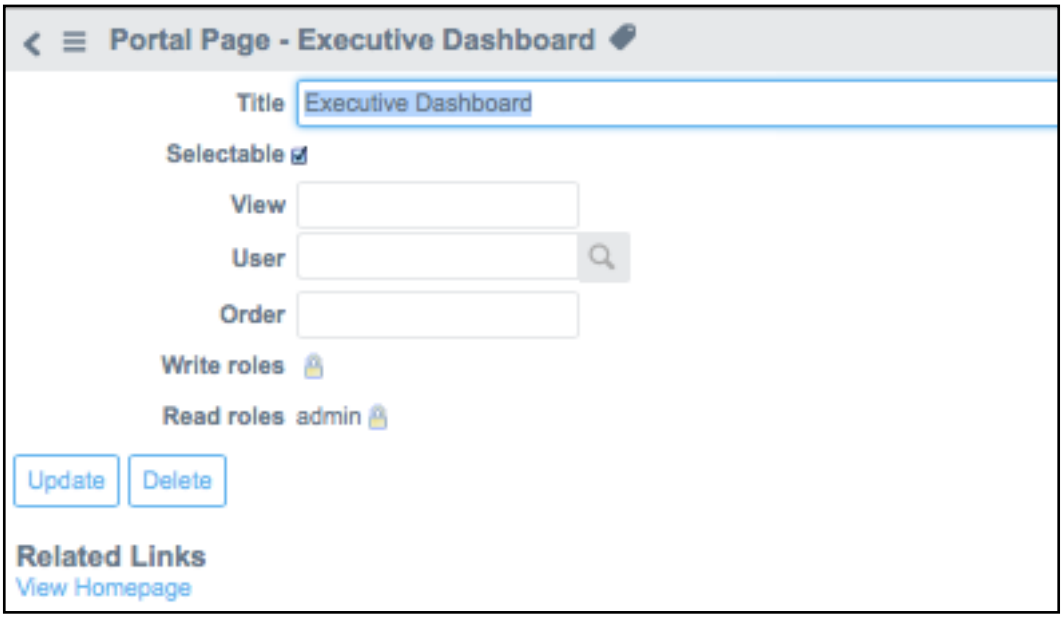
Lab 5 Who's Going to See This Killer Dashboard?

Instructions

1. Navigate **Homepage Admin > Pages**.

2. Open the **Executive Dashboard** record.

3. Add **admin** to the Read roles and make it **selectable**.



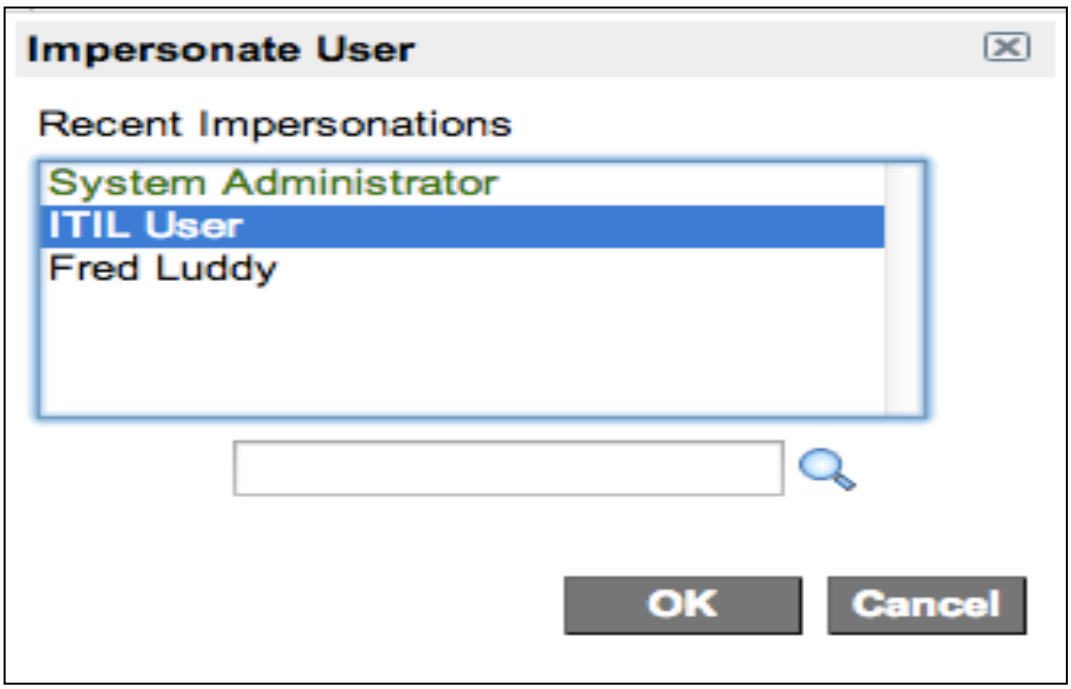
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4. **Update** the record.

5. Now lets swap our identity – swap your Conference badge with the person sitting to your right! Or you can use the Key decoration to impersonate a different user!



6. Select the **ITIL** user – this user does not have the **admin** rights.



7. Now you're acting as the ITIL user. Try to select the Homepage; swap back to the **admin** and check that it is still there!

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