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SAN DIEGO

Creating ServiceNow Dashboards

Your Guides: Kelly Limberg and Sheldon Swift

Agenda

- Types of ServiceNow Reports
- PPM Resource Reports
- Homepages and Dashboards
- Creating Reports

Part I:
Types of Reports

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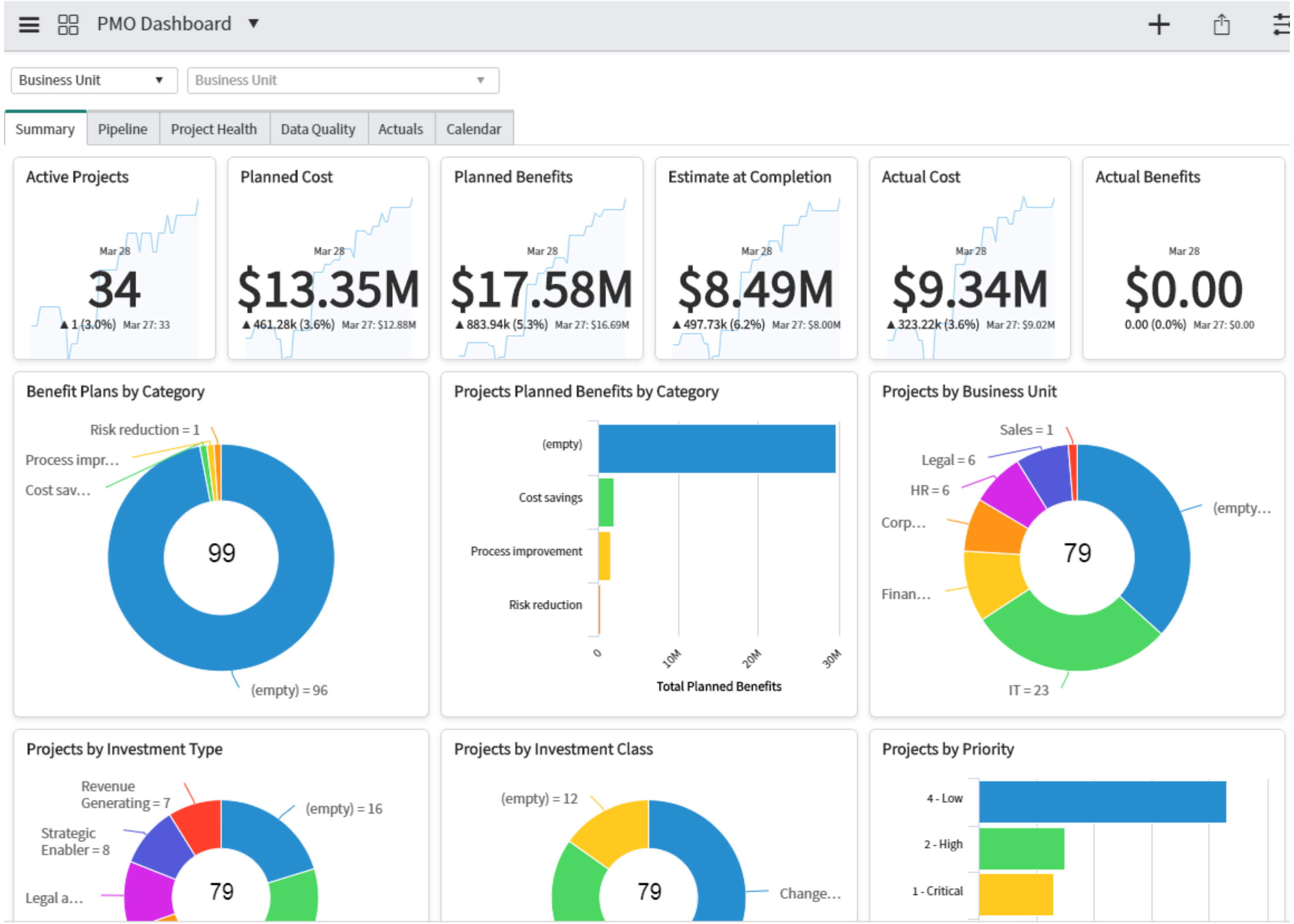
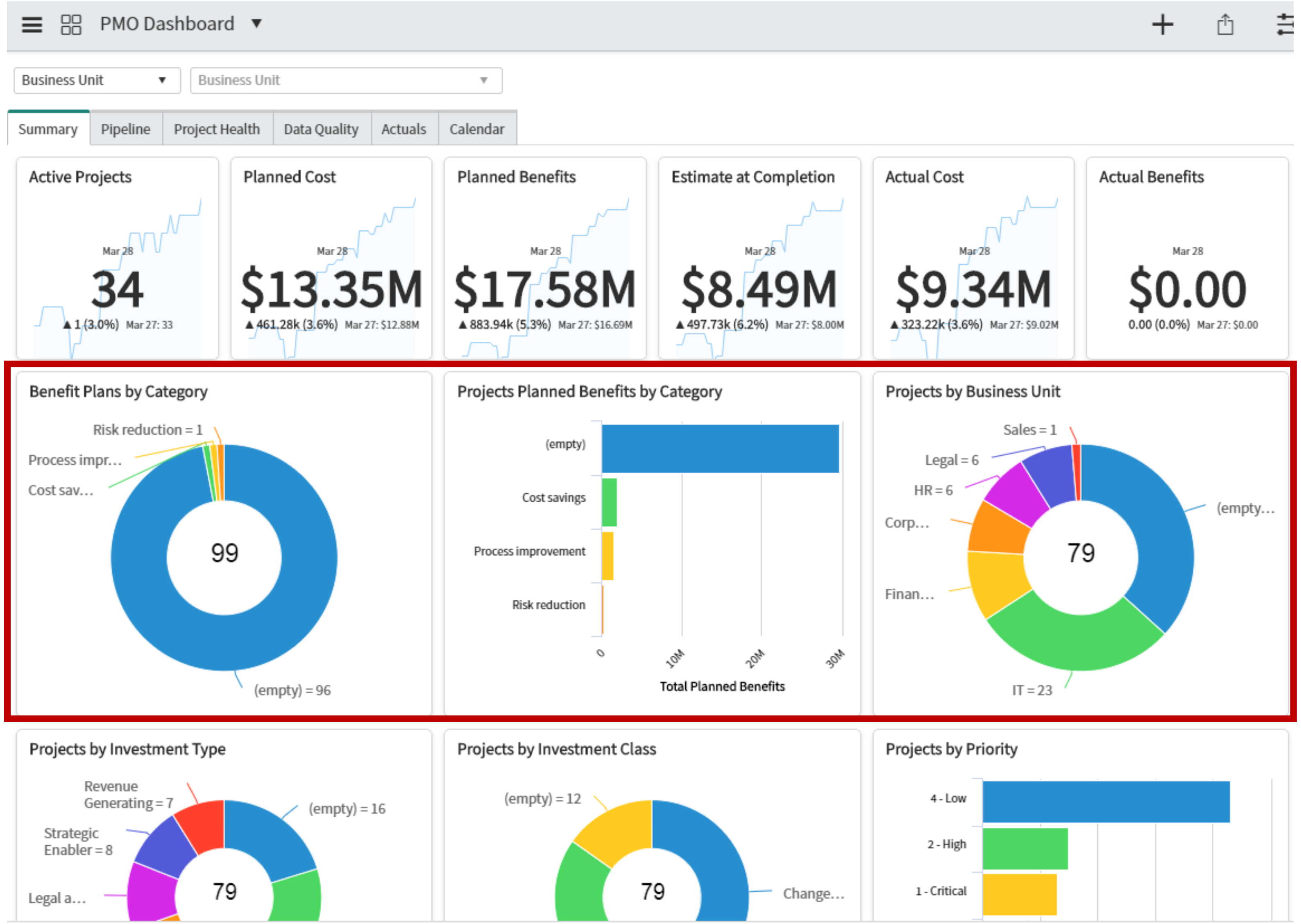
Dashboards

- Dashboards have a drag-and-drop canvas that lets you easily add, move, and resize widgets.
- Add multiple tabs.
- Build with single score reports at top.



Native UI Reports

- Easy to build from tables and report sources. Drill down for row level details. Multiple stack or group options.



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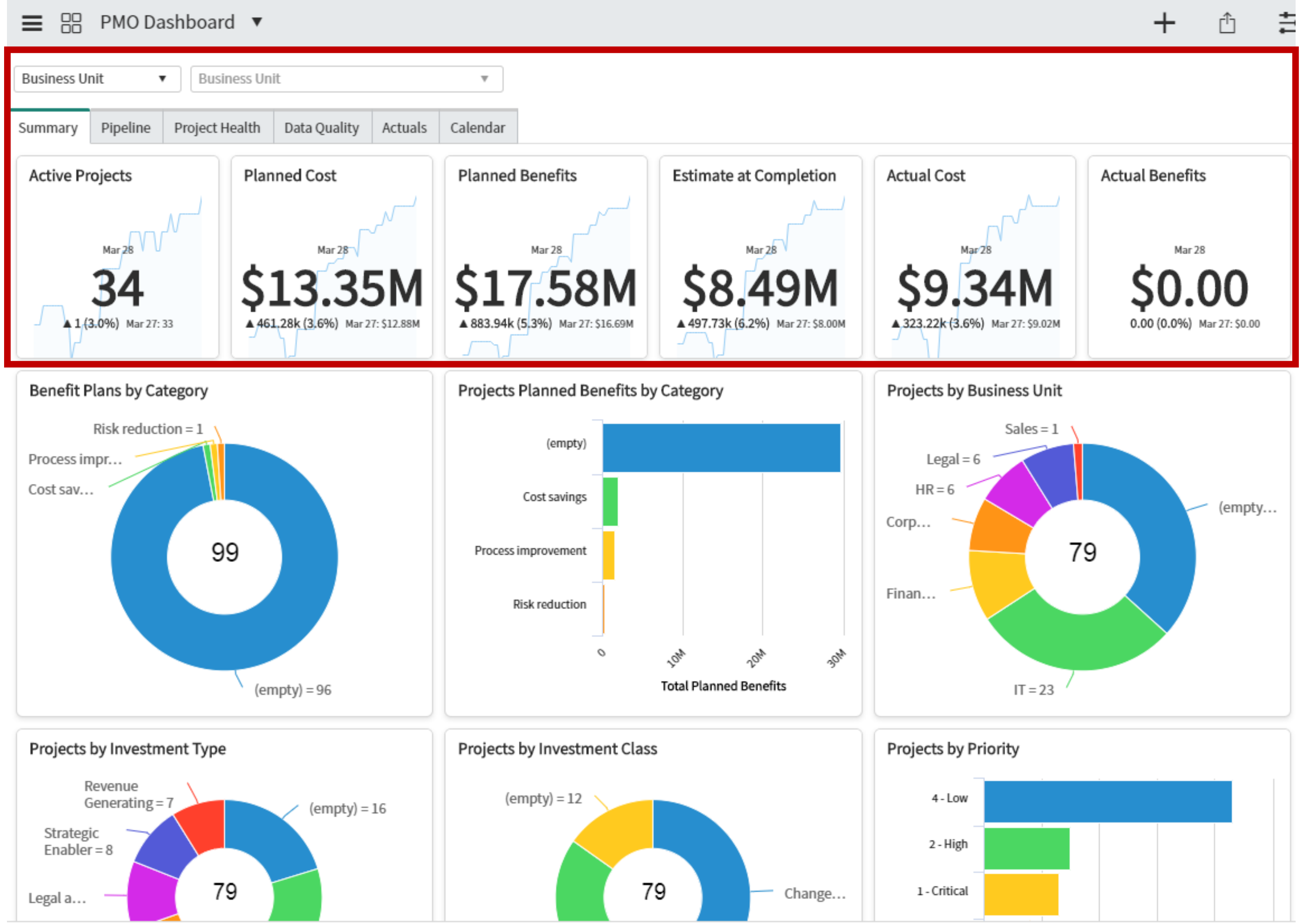
Performance Analytics Reports (1)

- Shows trending
- Drill down to detailed data with sorting grouping and breakdown options
- Interactive filters



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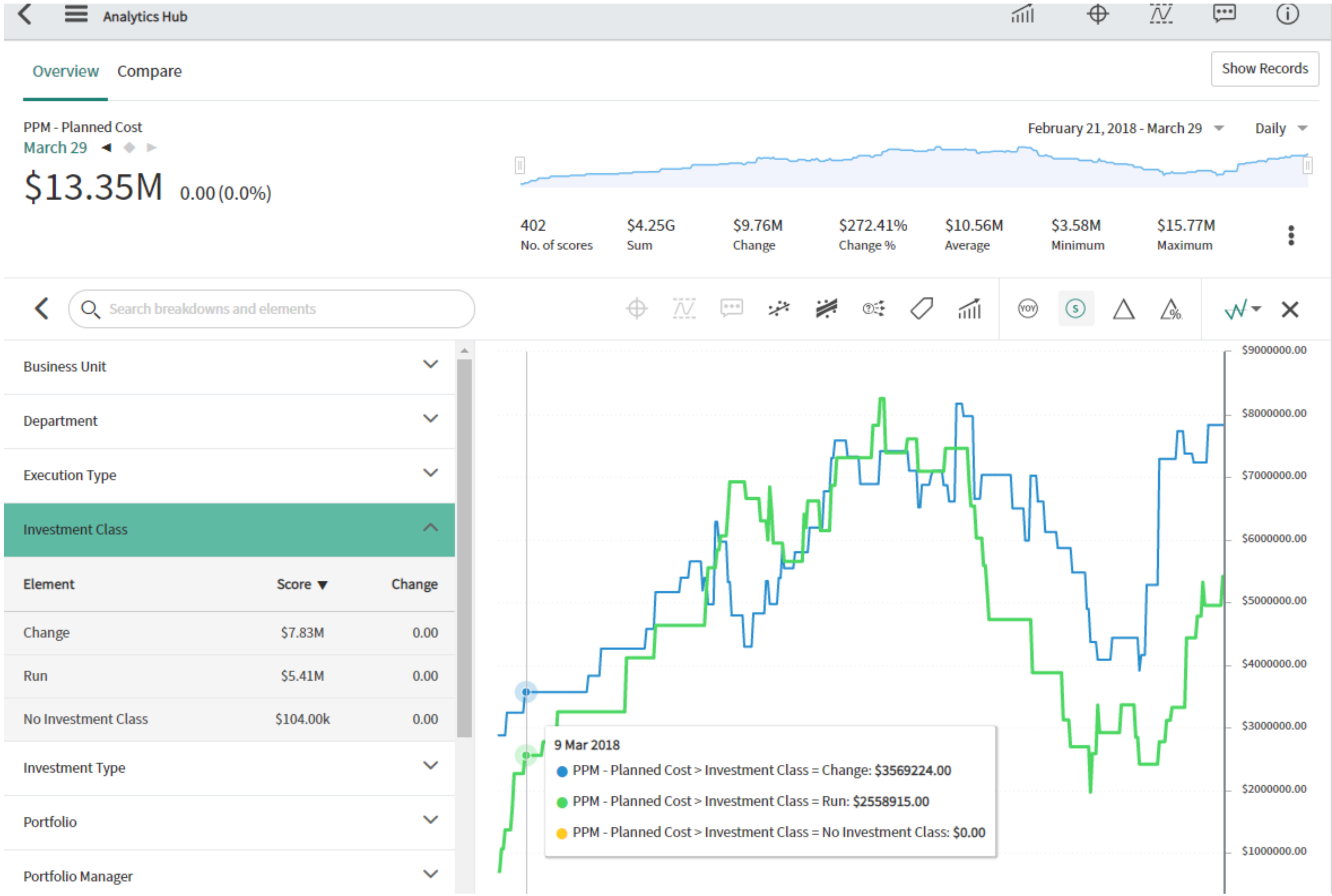
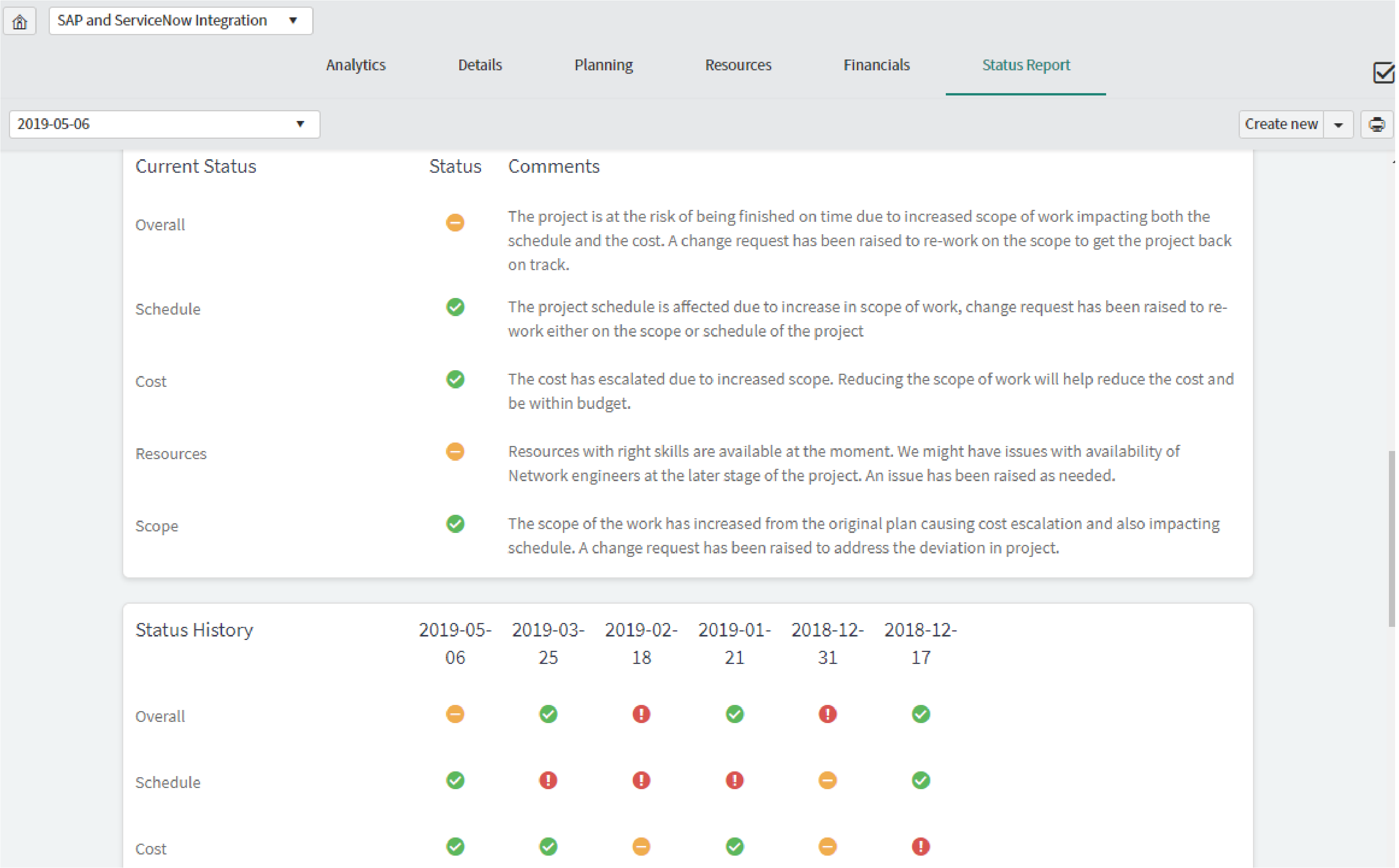
Performance Analytics Reports (2)

- Analytics hub
- Multiple breakdown options
- Trend over time grouped by breakdown



HTML Reports

- Such as the Project Status Report
- Multiple Widgets
- Data from JSON or Glide queries
- Rendered via HTML
- Pure custom with flexible options



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Dashboard Tips

- Build Dashboards for a specific persona, such as Project Manager, Demand Manager or Resource manager.

- When a user logs in to ServiceNow, the default homepage defined for their role appears unless the user switched to another homepage, then the last dashboard or homepage viewed by the user will be displayed upon logging back into ServiceNow.

- You can only duplicate dashboards where you're the owner. So modify an existing homepage which will allow you to then convert it to a dashboard which you can use as a base dashboard report to copy from.

Part II:
PPM Resource Reports

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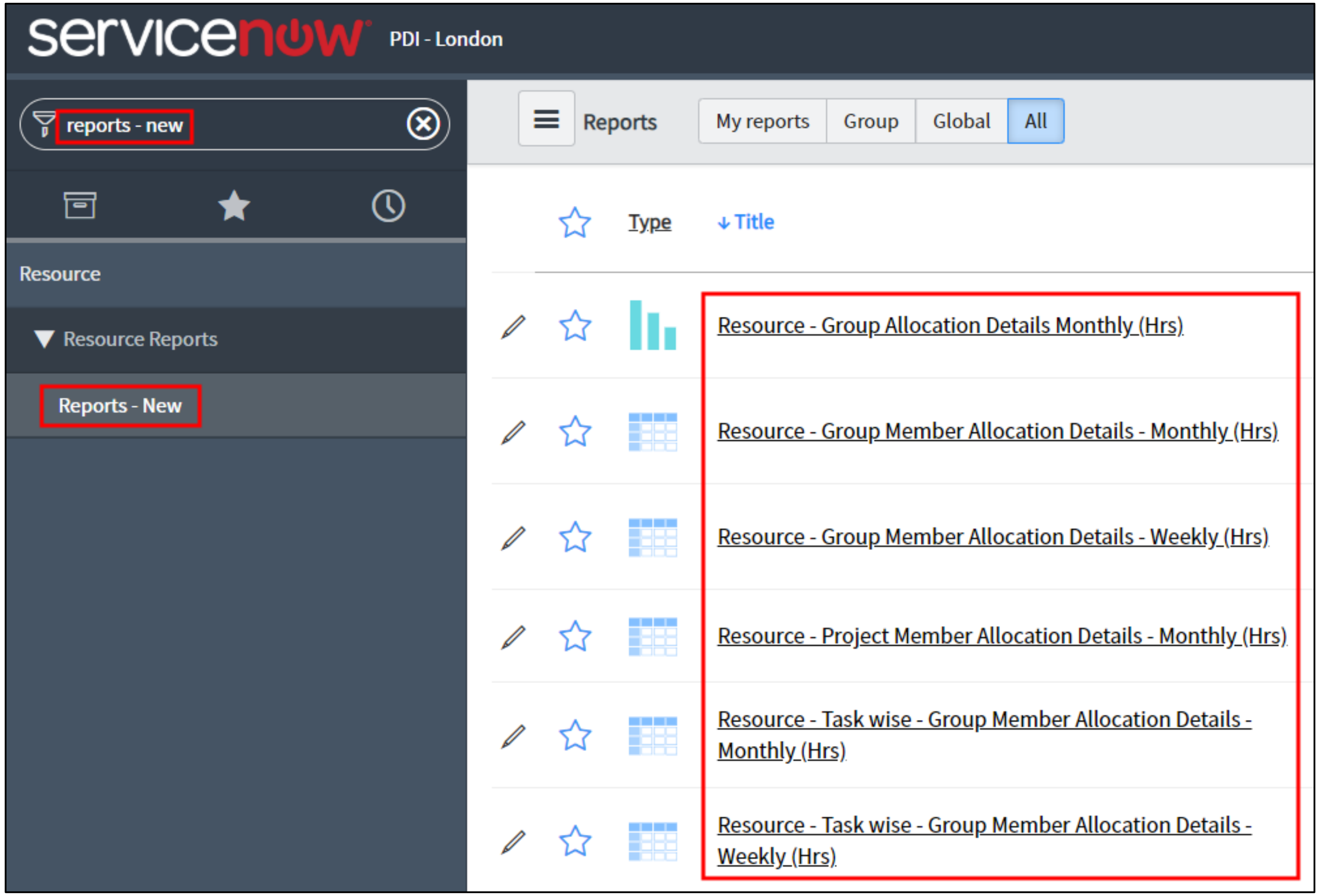
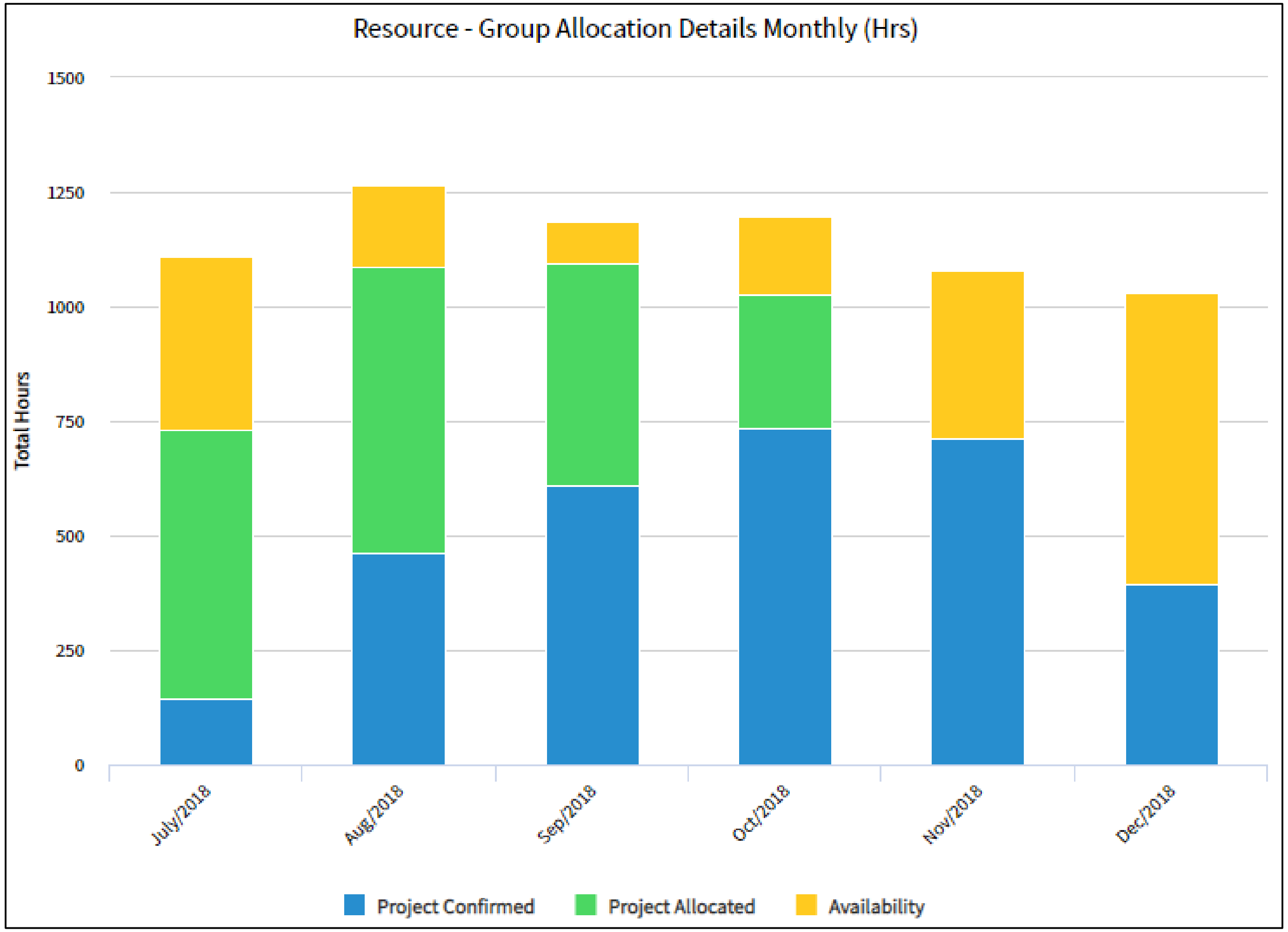
PPM Resource Reports

- There are many Resource Management reports out of the box which can be customized.
- Reports can be published, shared, scheduled, added to a dashboard.
- Dashboards can exported to PDF or Printed.
- All reports are customizable by modifying column and row data, aggregation, number of groups, and filters.



Resource — Group Allocation Details — Monthly (Hrs)

- Stack bar chart shows the breakdown of allocated time and available time of a group.



Resource - Group Member Allocation Details - Monthly/Weekly (Hrs)

- Pivot report shows capacity, availability, and allocated hours of all group members in a monthly/weekly time frame.

- The default filter is between today and the next two quarters.

- Select a group and run the report.

Resource - Group Member Allocation Details - Monthly (Hrs)

Hours	Month starts on	01-01-2019		02-01-2019		03-01-2019		Sum
	Parent category	Capacity	Availability	Capacity	Availability	Capacity	Availability	
User								
Davis Heideman		184	184	160	160	168	168	1,024
Eddie Gauer		184	184	160	160	168	168	1,024
Eric Schroeder		184	184	160	160	168	168	1,024
James Anderson		184	184	160	160	168	168	1,024
Rosalia Kennemur		184	184	160	160	168	168	1,024
Vanessa Lewallen		184	184	160	160	168	168	1,024
Sum		1,104	1,104	960	960	1,008	1,008	6,144

Resource - Project Allocation Details by User Daily

- Displays allocation details of resources in a project. The values in this report are derived from the Resource Allocation Daily [resource_allocation_daily] table.

Resource - Project Allocation Details by User Daily

Hours / User	Date	10-01-2018	10-02-2018	10-03-2018	10-04-2018	10-05-2018	10-08-2018	10-09-2018	10-10-2018	10-11-2018	10-12-2018	10-15-2018	10-16-2018	10-17-2018	10-18-2018	10-19-2018	10-22-2018	10-23-2018	10-24-2018	10-25-2018	10-26-2018	10-29-2018	10-30-2018	10-31-2018	Sum
Bud Richman		9	9	9	9	9	9	9	9	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	192
Sum		9	9	9	9	9	9	9	9	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	192

Resource — Project Member Allocation Details — Monthly (Hrs)

- Pivot report shows the list of users allocated to a project on a monthly scale. The report shows allocated and actual hours of every user.
- Select a project and run the report.

Resource - Project Member Allocation Details - Monthly (Hrs)

▼ Hours		Month starts on	07-01-2018	08-01-2018	09-01-2018	10-01-2018	Sum
		Parent category	Allocated	Allocated	Allocated	Allocated	
User	Task						
▼ Allie Pumphrey	Total		168	195	81		444
	PRJ0021176		168	195	81		444
▼ Alva Pennigton	Total		35				35
	PRJ0021164		35				35
▼ Garth Skiffington	Total		88	92	80	92	352
	PRJ0010007		88	92	80	92	352
▼ Paul Martin (Project Mgr)	Total		169	56			225
	PRJ0021173		169	56			225
▼ Troy Mccoy	Total		54	56	48	55	213
	PRJ0021100		27	28	24	27	106
	PRJ0021192		27	28	24	28	107
Sum			514	399	209	147	1,269

Resource — Task wise — Group Member Allocation Details — Monthly/Weekly (Hrs)

- Pivot report shows the following information for every member of the group:
  - All tasks (projects and other tasks) to which the member is allocated.
  - Allocated time and actual time spent by the member on the allocated tasks, on a monthly/weekly basis, for the next two quarters.

Resource - Task wise - Group Member Allocation Details - Monthly (Hrs)

▼ Hours		Month starts on	01-01-2018		02-01-2018	03-01-2018		04-01-2018		05-01-2018		06-01-2018		07-01-2018		08-01-2018	09-01-2018	10-01-2018		11-01-2018	12-01-2018	Sum
		Parent category	Allocated	Actual	Allocated	Allocated	Actual	Allocated	Actual	Allocated	Actual	Allocated	Actual	Allocated	Actual	Allocated	Allocated	Allocated	Actual	Allocated	Allocated	
User	Task Short description																					
▼ Alva Pennigton	Total		128		160	196	24	196	176	191	184	166	168	35	96	119	140	175	40	173	95	2,462
	(empty)																	4		3	3	10
	Application Rationalization																		40			40
	IT Asset Management Rollout					80	24	168	176	191	184	166	168	35	96							1,288
	Network Monitoring System															119	140	171		170	92	692
	Upgrade printers in all office locations		128		160	116		28														432
▼ Beth Anglin	Total		9	126	73	246	154	202	147	190	161	54	147		91	157	165	195		202	121	2,440
	(empty)																	4		4	4	12
	Implement Fleet Management Application				45	198	154	188	147	190	161	54	147		91							1,375
	Network Monitoring System															157	165	191		198	117	828
	Replace SVN with git		9	126																		135
	Upgrade printers in all office locations				28	48		14														90

Part III: Homepages and Dashboards

Converting Homepages

Creating New Dashboards

Adding Content to Dashboards

Modifying Dashboard Layout

Adding Dashboard Tabs

Exporting Dashboards to PDF

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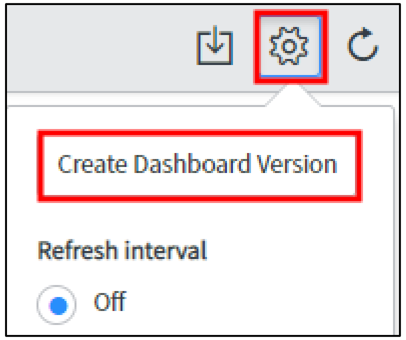
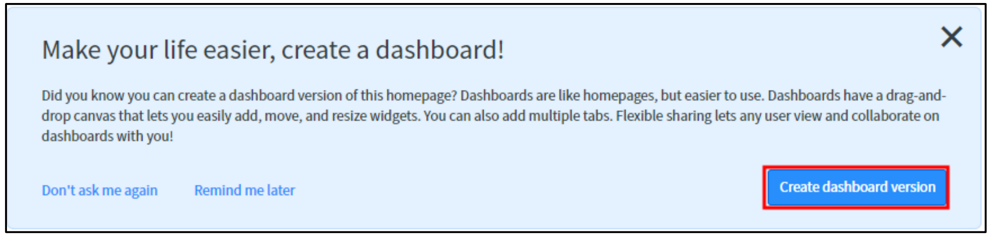
Let Rego be your guide.

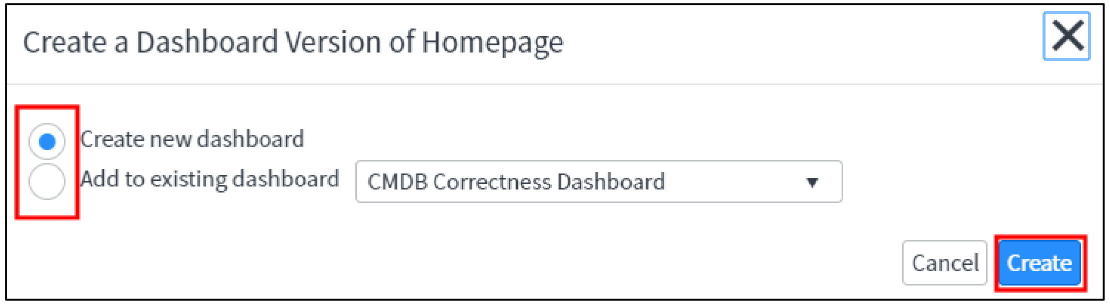
Converting Homepages to Dashboards (1)

- Homepages can be converted into Dashboards two ways:
  1. Click the **gear** icon on the right and click the **Create Dashboard Version** button.
  2. In the big blue banner, click the **Create dashboard version** button.
  3. Select either **Create new dashboard** or **Add to existing dashboard** (only ones you own will display here), then click the **Create** button.



Note: You will only see the “Create Dashboard Version” button on homepages you created or personalized.



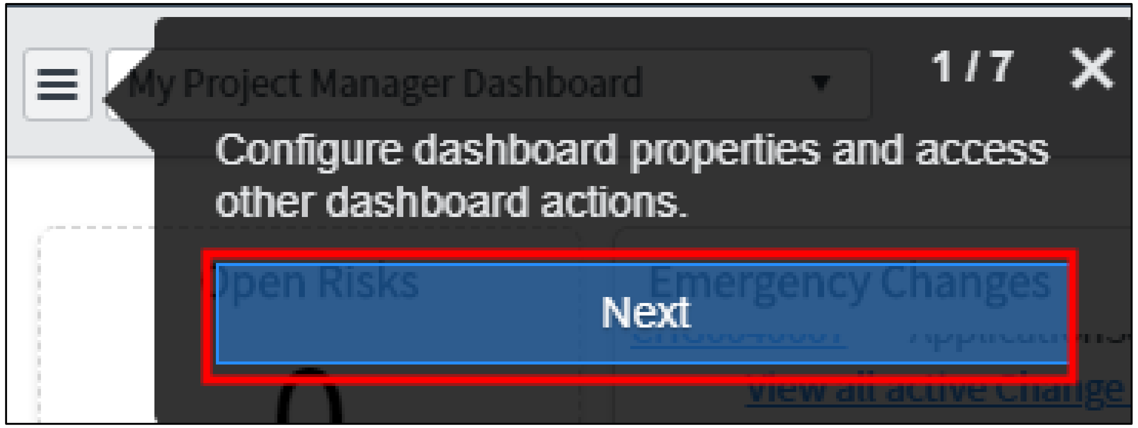


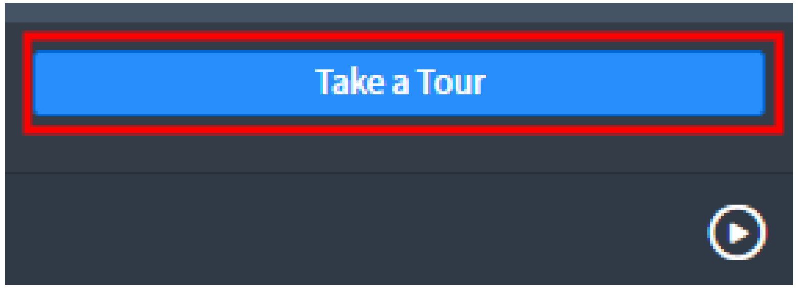
Converting Homepages to Dashboards (2)

4. You will then be guided thru a Dashboard tour.

5. Click **Next** to go thru the tour. Click the **X** if you want to ignore the tour.

6. To return to the Dashboard tour later, click the question mark on the right side, then at the bottom, click **Take a Tour** button.

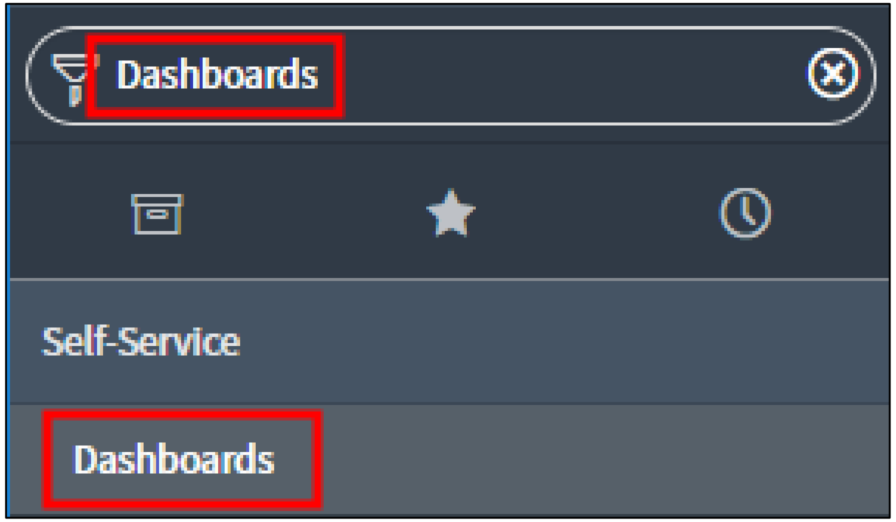


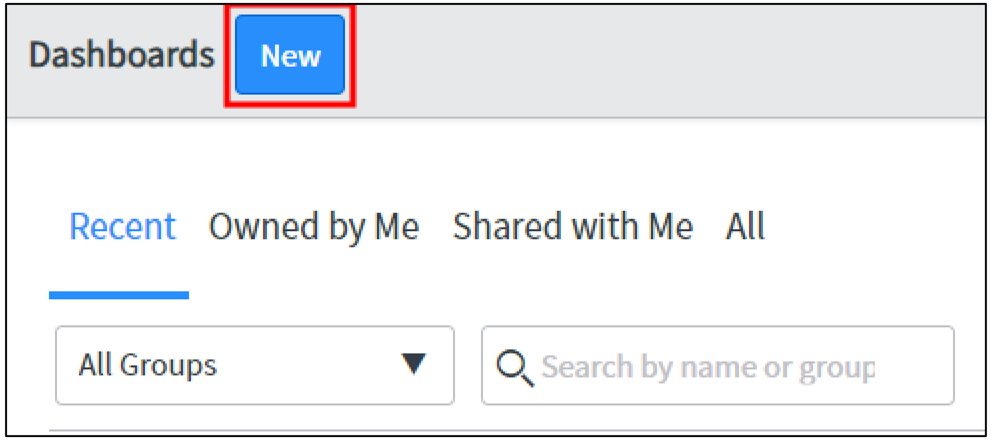


Creating New Dashboards (1)

1. Any user with a role in ServiceNow can create a new dashboard by clicking **Dashboards** in the Navigator.

2. Click the **New** button. (Note: you can also duplicate your personal dashboards and modify the duplicated dashboard.)

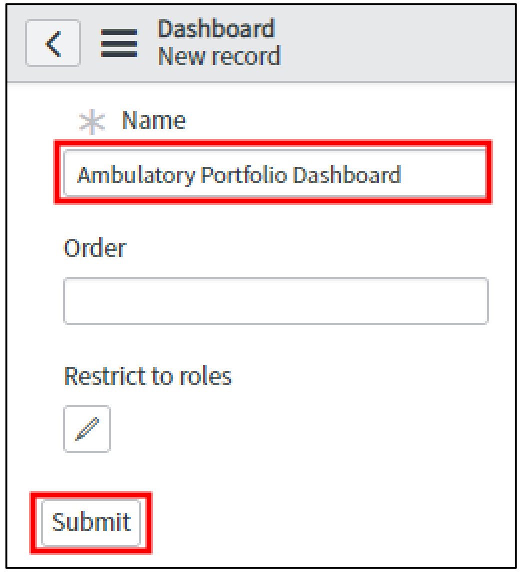


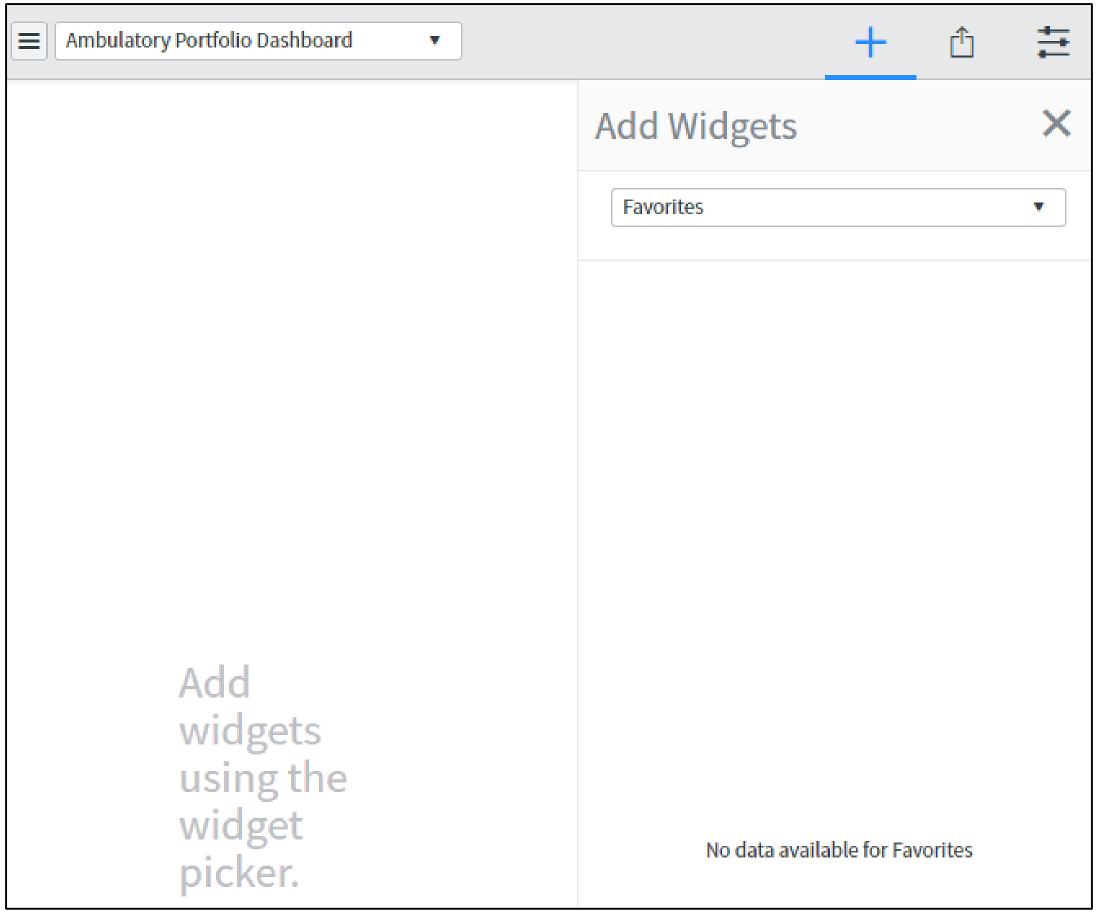


Creating New Dashboards (2)

3. Enter a Dashboard **Name** and click **Submit**.

4. You will be taken to the newly created Dashboard to add reports, widgets, adjust the layout, and share with other users.

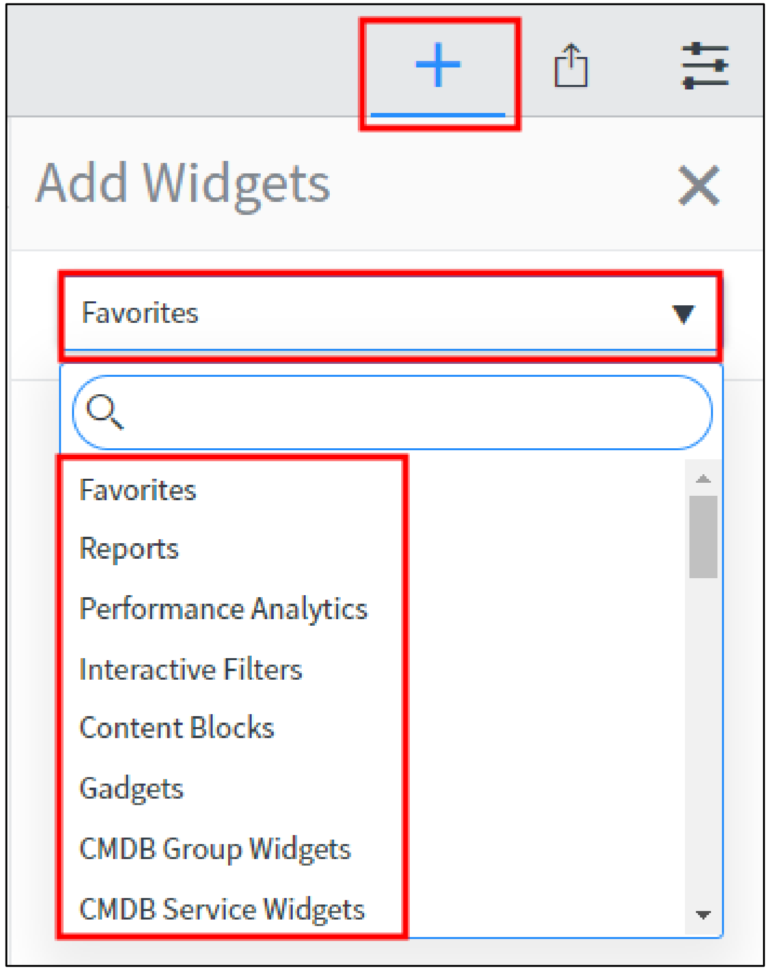




Dashboard Components

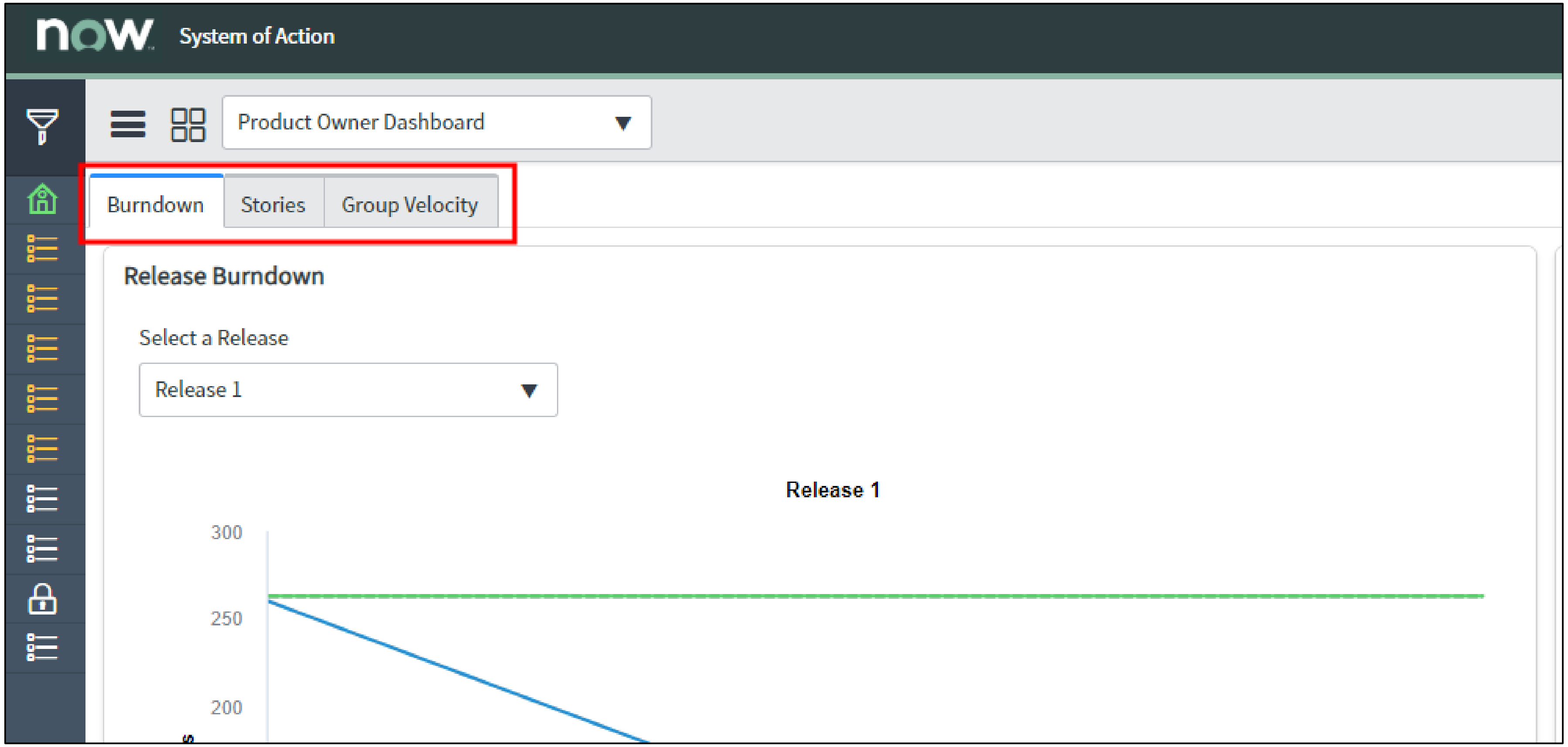
There are many components that can be added to a Dashboard such as:

1. Tabs
2. Interactive Filters
3. Widgets
4. Gauges
5. Etc.



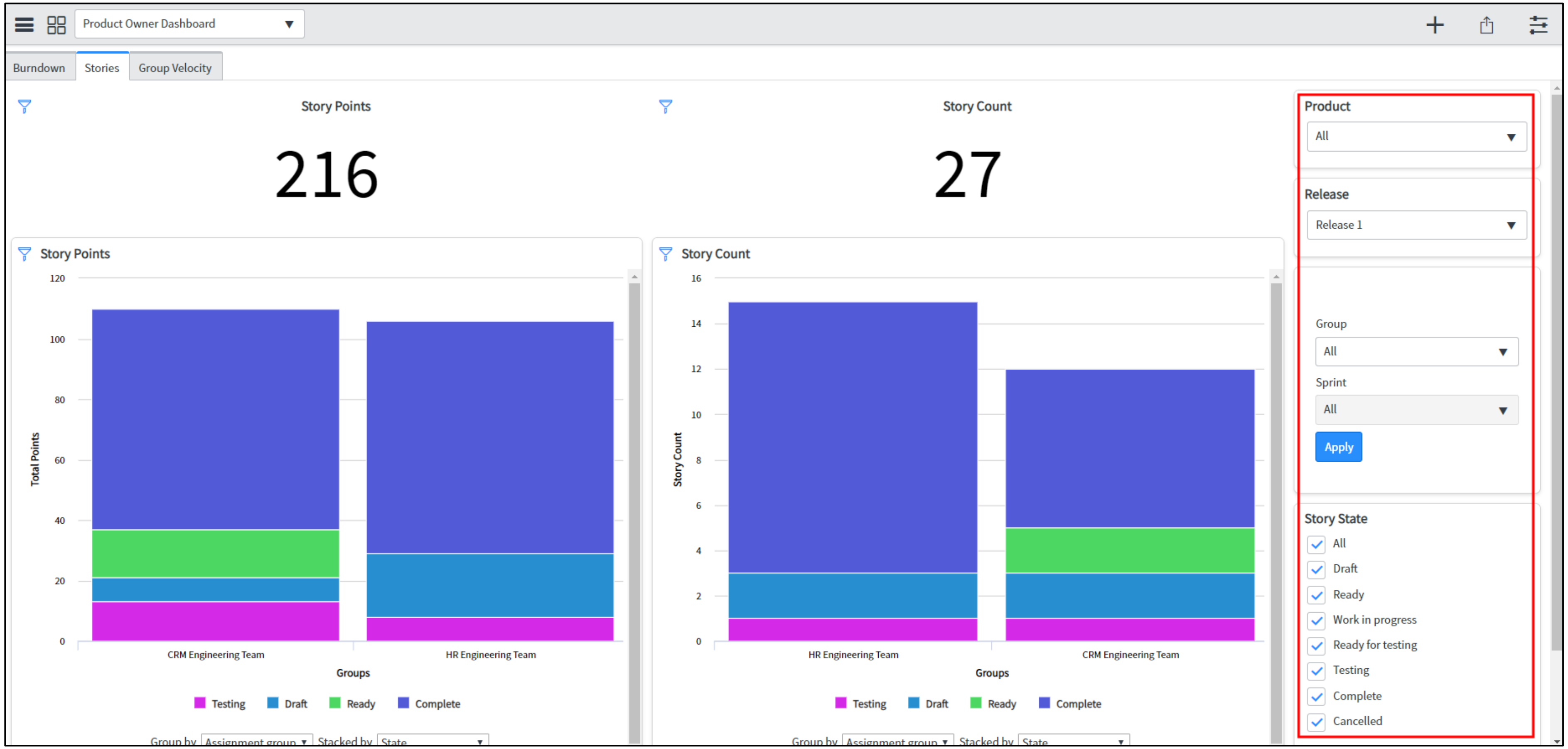
Dashboard Components – Tabs

Multiple Tabs can be added to a Dashboard to organize information and quickly jump from page to page.



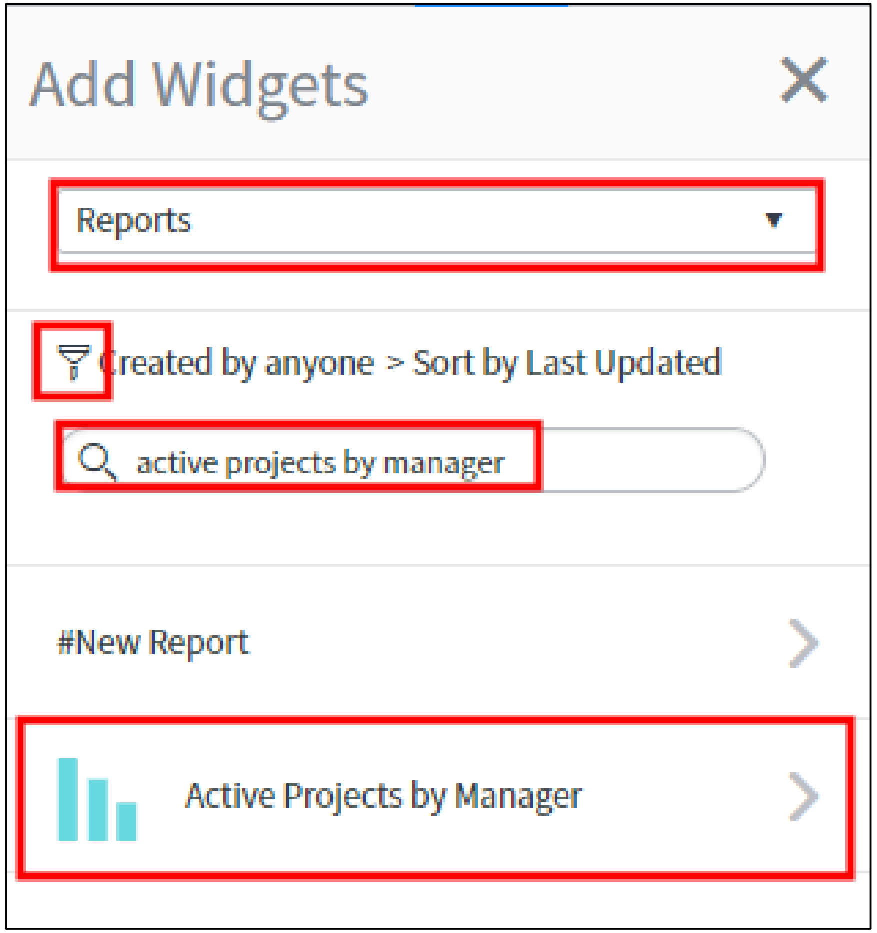
Dashboard Components – Interactive Filters

Interactive Filters can be added to a Dashboard to instantly filter reports based on different filter criteria. (A subscription to Performance Analytics is required.)



Adding Content to Dashboards (1)

1. Select **Reports** in the drop down to add reports to the new Dashboard.
2. Click the filter icon to change the filter to view all reports if necessary.
3. Add keywords to find a report.
4. Select the report you'd like to add.

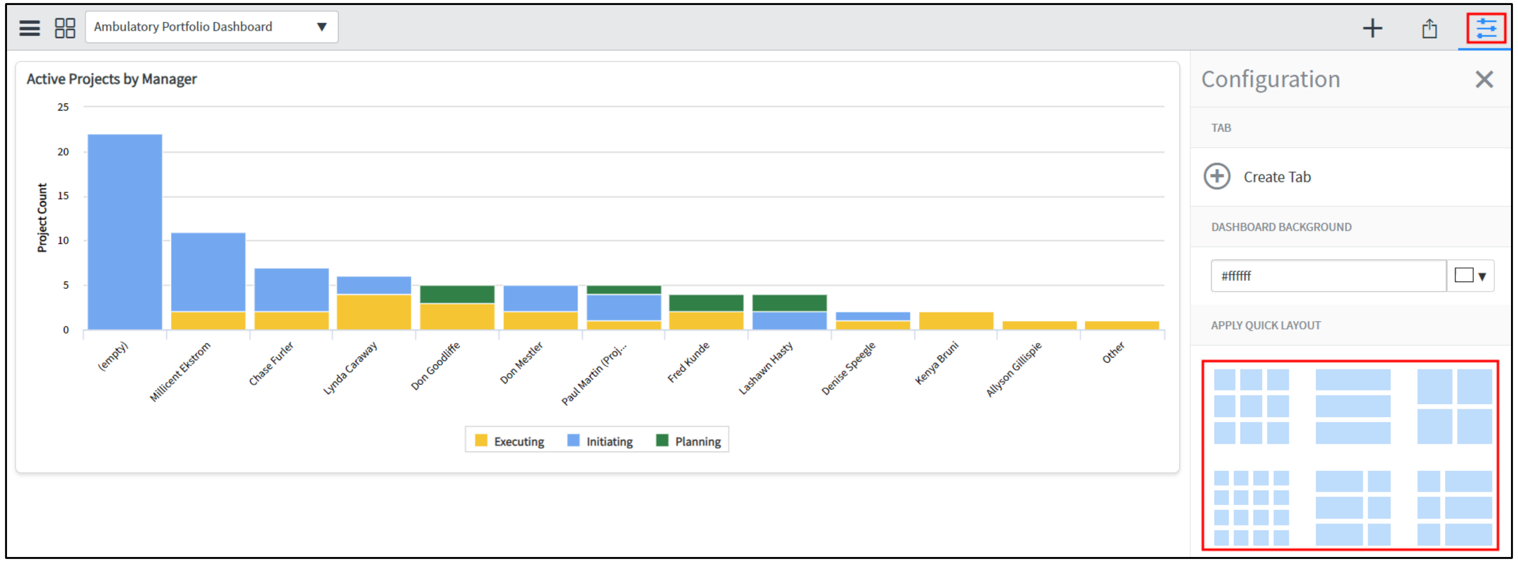


Adding Content to Dashboards (2)

5. A small preview of the report will display, click the **Add** button to add the report to the Dashboard.

Modifying Dashboard Layout

1. Click the **Configuration** icon on the right side to enter “dashboard edit” mode.
2. Here you can change the dashboard background color or select a quick layout format the widget to a default size or to customize the widget size, grab the bottom left/right to reshape it. You can also grab the top of the widget to re-position the entire widget on the dashboard canvas.



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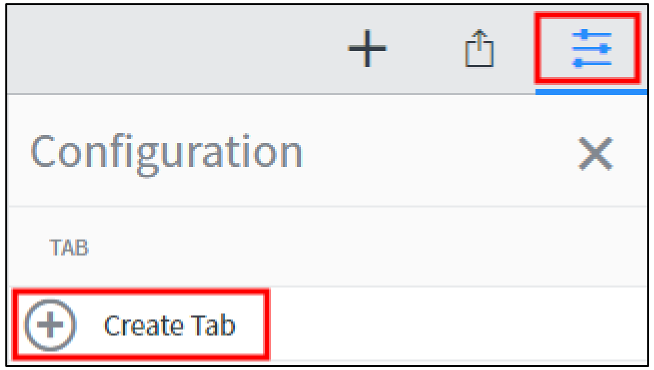
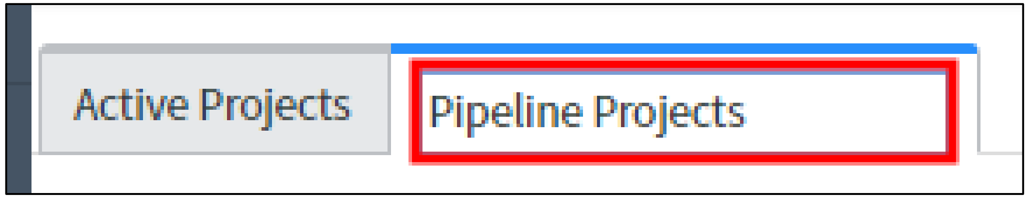
Creating Dashboard Tabs

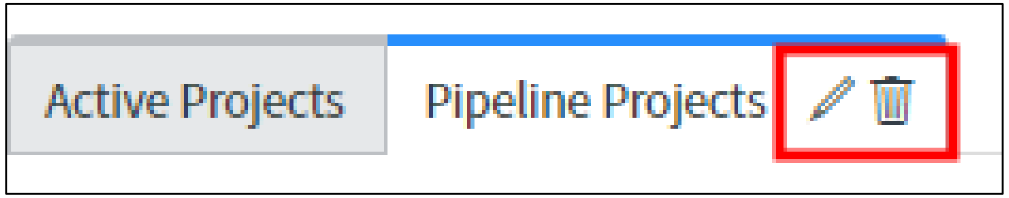
1. Click the **Configuration** icon, then click **Create Tab** to create a new tab.



2. Enter in names for the tabs.

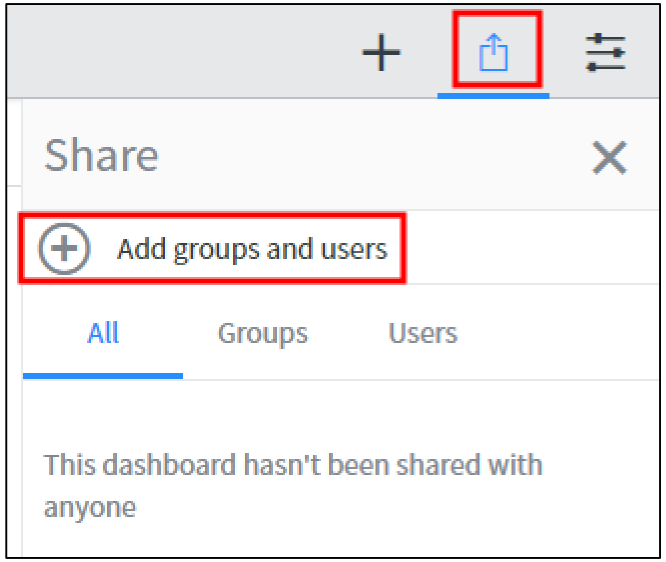


3. If you wish to change the tab name in the future, hover over the tab to edit names or delete tabs.

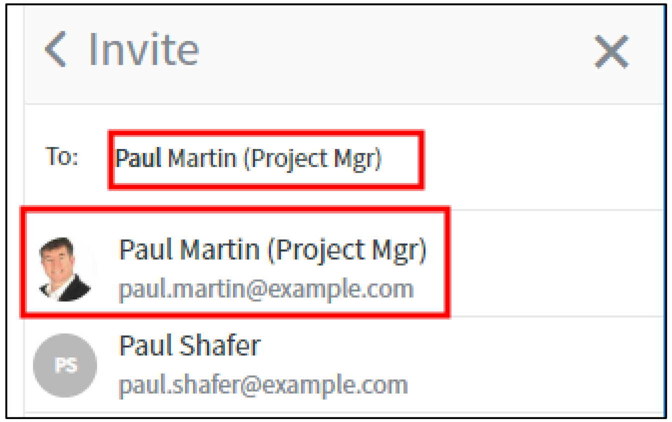


Sharing Dashboards with Others (1)

1. Dashboards can be shared with other users by clicking the **Sharing** icon, then **Add groups and users**.

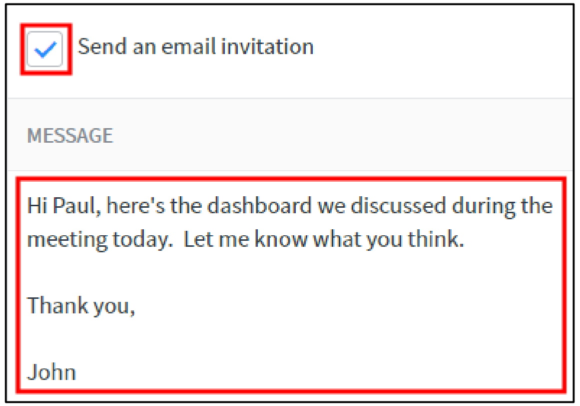


2. Enter users or groups and make a selection from the results.

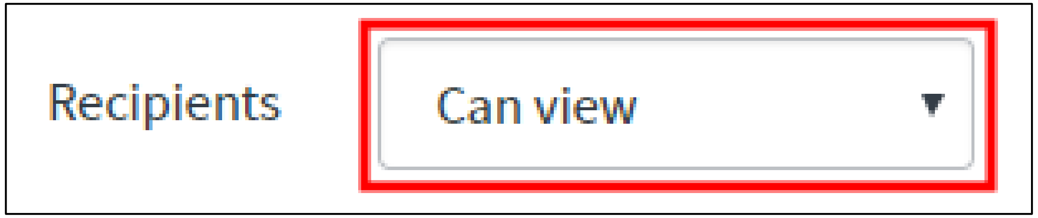


Sharing Dashboards with Others (2)

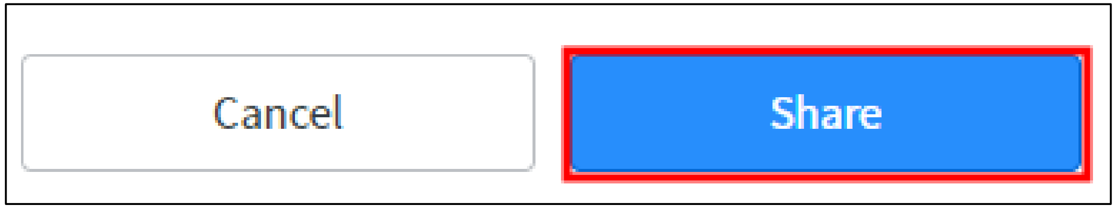
3. Check the box to send an email notification and enter an optional message for the recipients.



4. Near the bottom under **Recipients**, click the drop down and select either **Can view** or **Can edit** from the drop down.



5. Click **Share**. An email notification will be sent to the user (This notification can be modified or disabled).

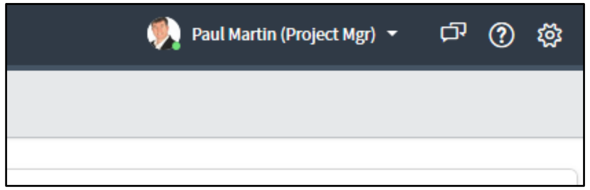


Sharing Dashboards with Others (3)

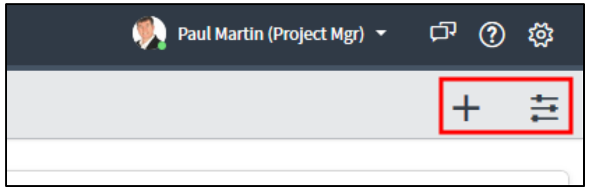
6. The invited user can now **view/edit** the dashboard depending on the access provided.
   a. Note: A user that was invited to **edit** can edit the dashboard, but can not delete it or share with other users, only the owner of the Dashboard can perform those tasks. Also, a user must have at least one role in order to edit.

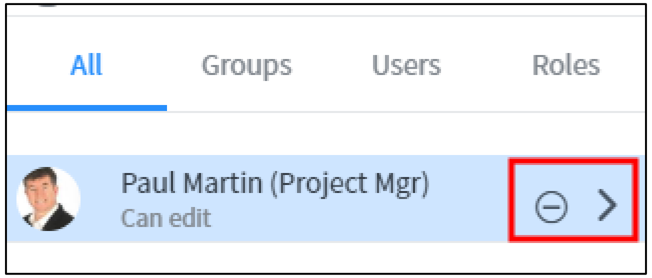
7. Remove a user by clicking the round **Remove** icon or change access by clicking the **arrow**.

Shared Dashboard with "View" Access



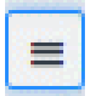
Shared Dashboard with "Edit" Access





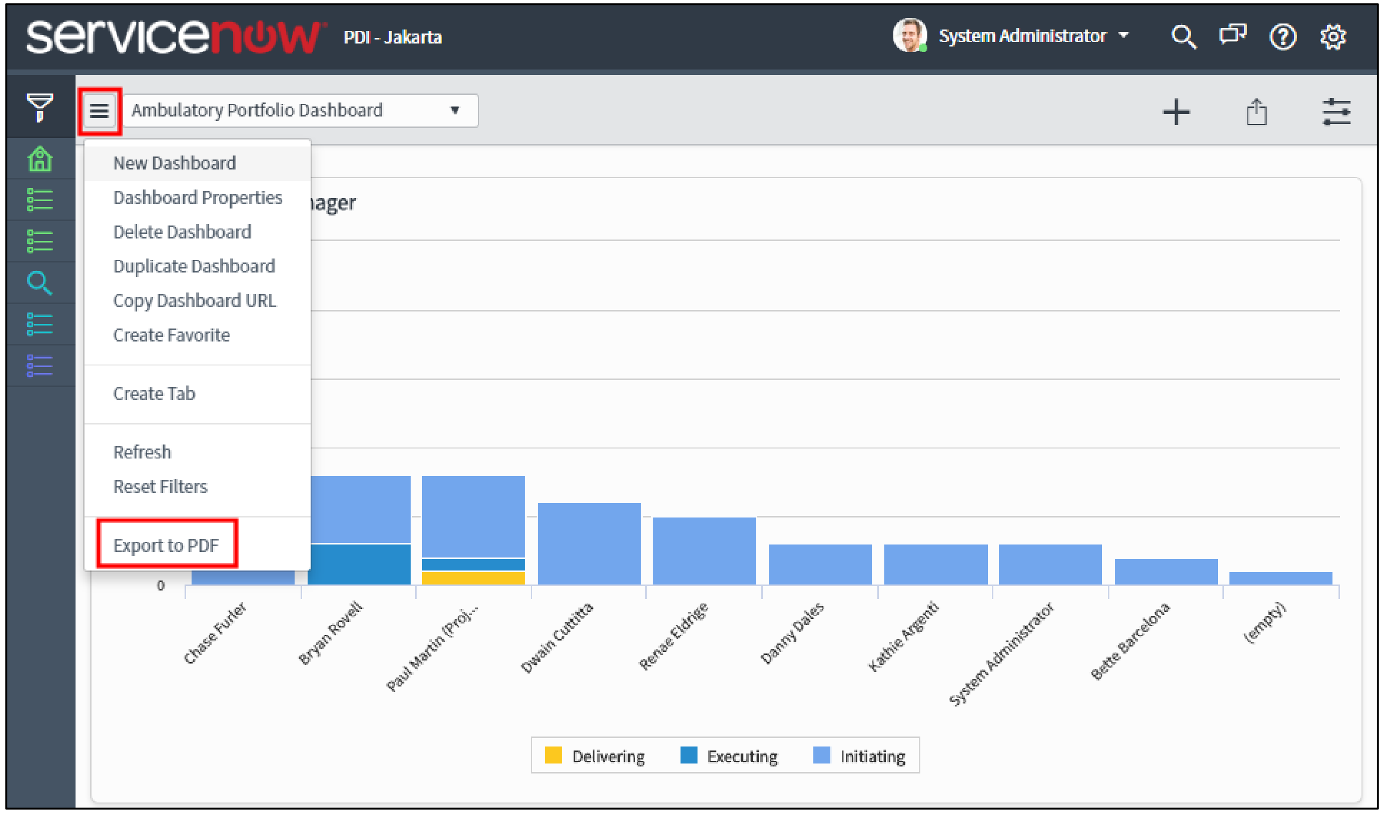
Exporting Dashboards to PDF

1. Click the Context menu and select **Export to PDF.**



2. Configure your print and delivery options.
3. Click **Export**.

Note: Dashboards can't be scheduled at this time.



Part IV: Creating Reports

Edit Existing Reports

Sharing Reports

Scheduling Reports

Adding a Report to Dashboard or Homepage

Creating New Reports

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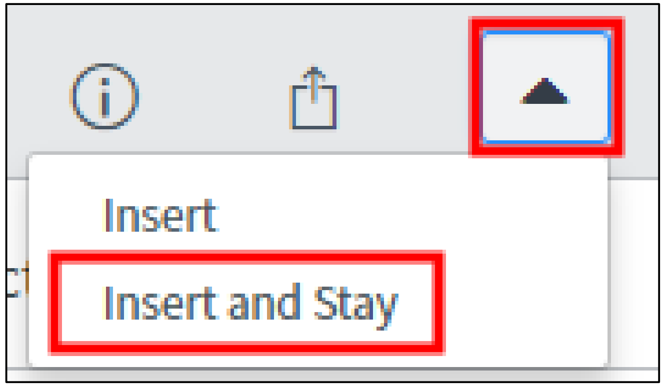
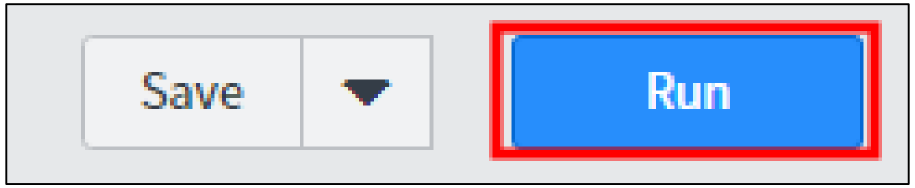
Edit Existing Reports (2)

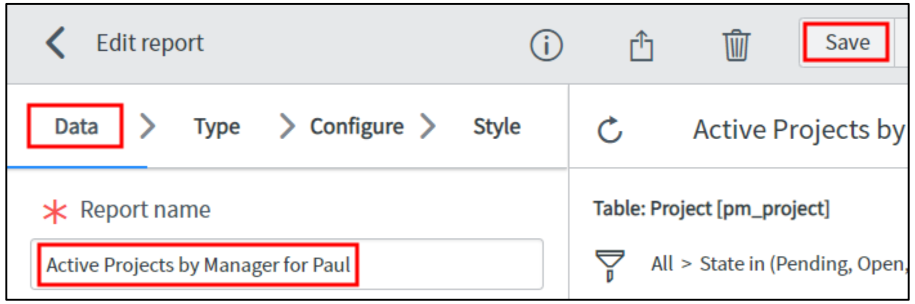
7. Once the necessary changes have been made, click the arrow and select **Insert and Stay** which copies the report and creates a new version with your changes and saves it.

8. Click **Run** to view the report.

9. Click the **Data** tab to customize the name of the report and then be sure to click **Save** to save any additional changes to the report.







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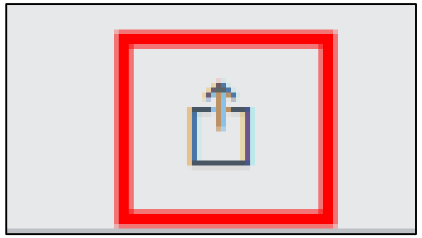
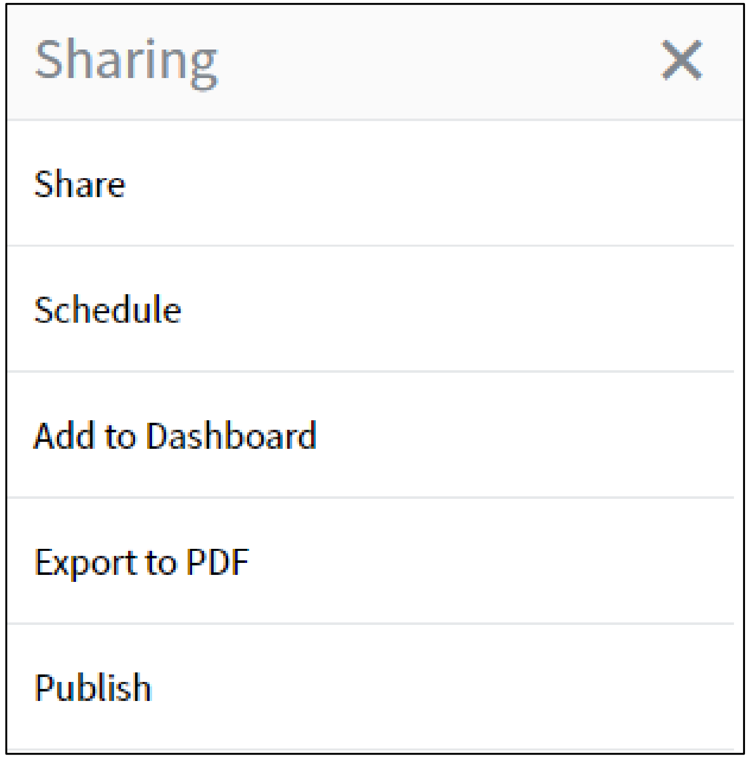
Sharing Reports (1)

1. Clicking the **Sharing** icon allows you to
   a. Share
   b. Schedule
   c. Add to Dashboard
   d. Export to PDF
   e. Publish

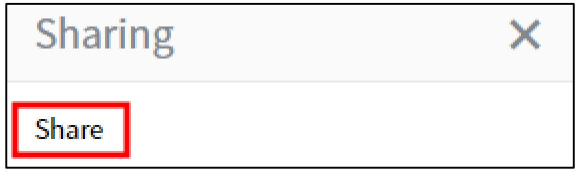
Note: Additional roles are needed to see all the functionality on the right.

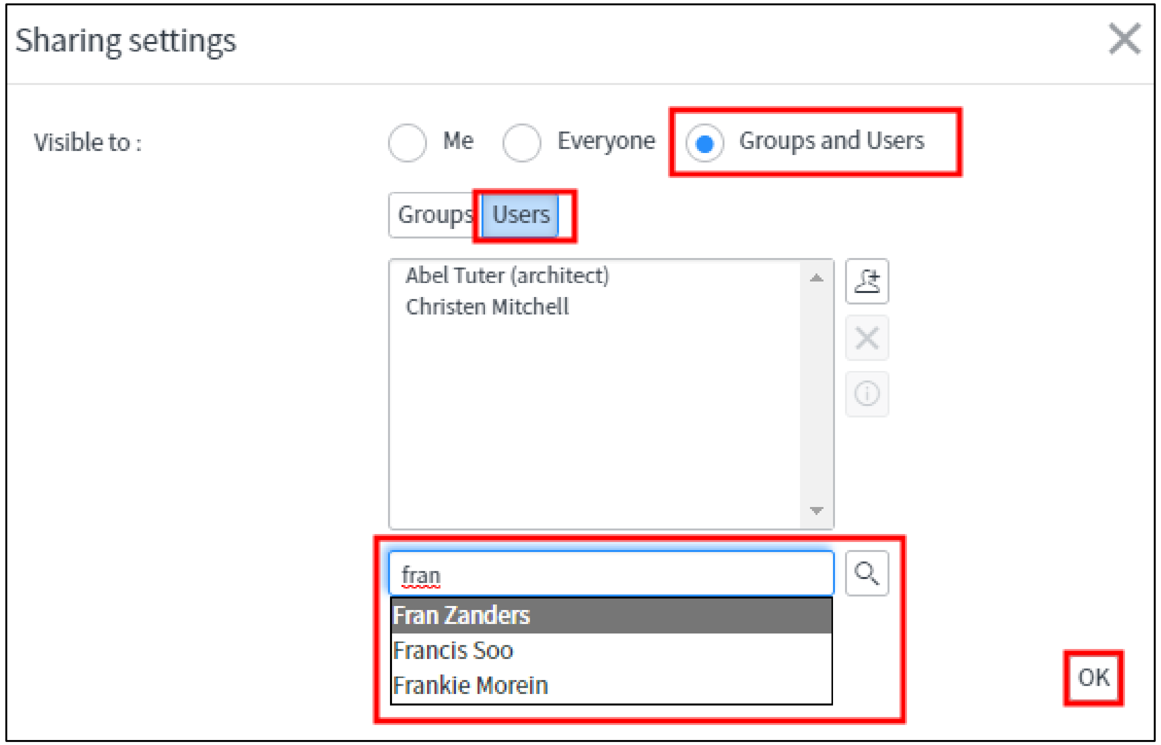




Sharing Reports (2)

2. Select **Groups and Users** then select the **Users** tab and add the necessary users, then click **Ok**.

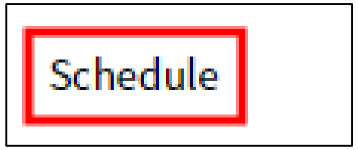


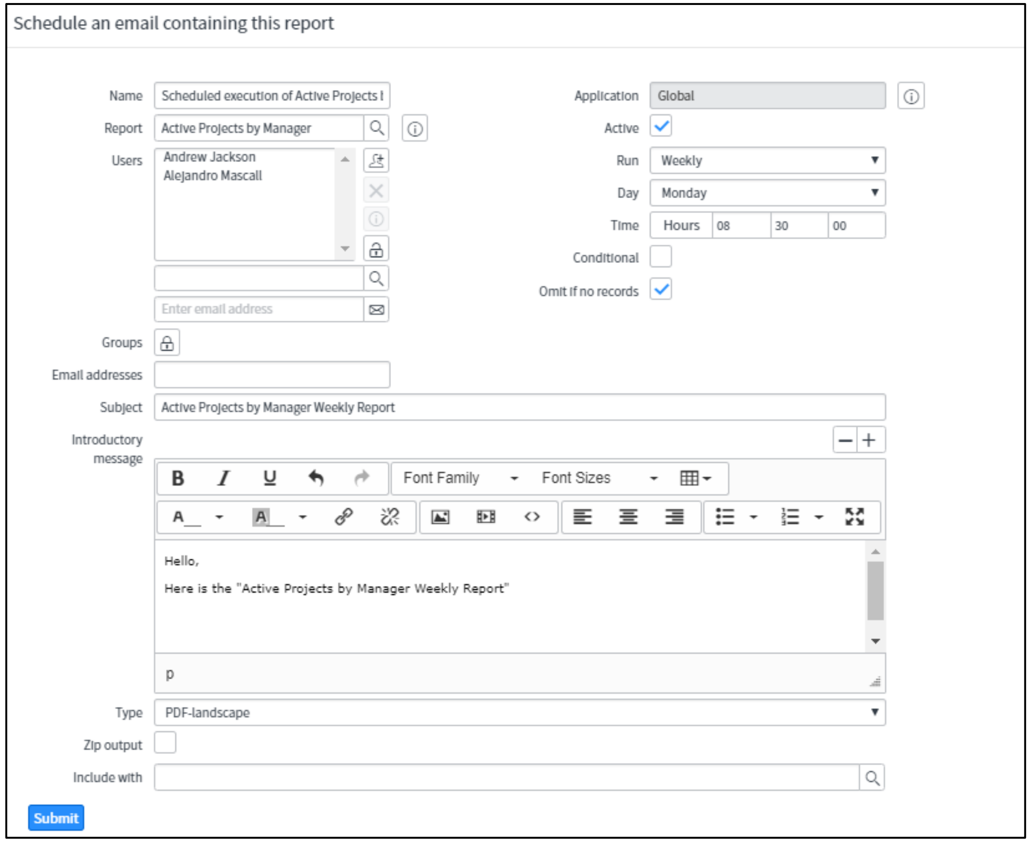


Scheduling Reports

1. Scheduling reports allow you to automatically send out reports on a regular occurrence (daily, weekly, monthly, etc.)

2. You can select users or groups and add conditional logic, subject lines, and messages.

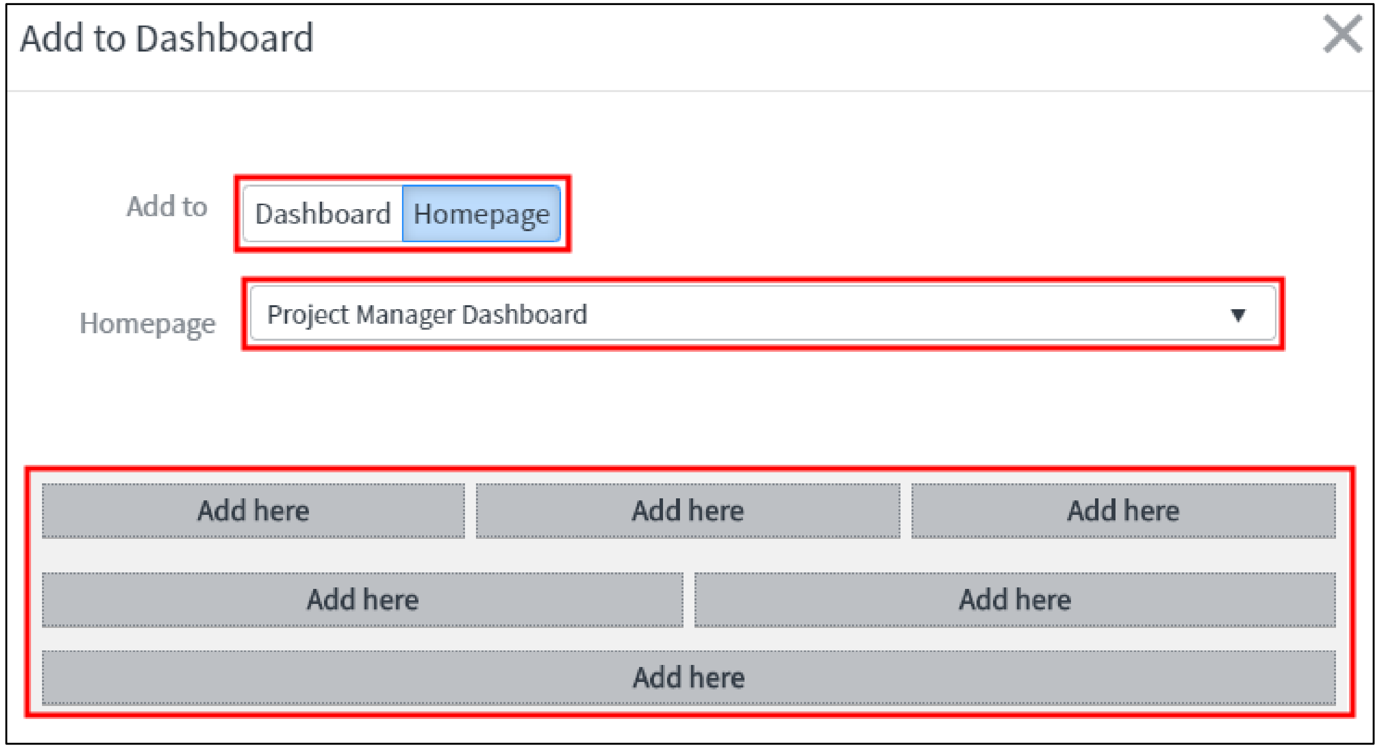




Adding a Report to a Dashboard or Homepage

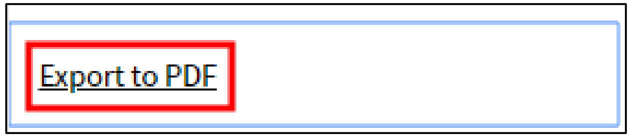
1. A report can be added to your Homepage or Dashboard by clicking the **Sharing** icon, then selecting the appropriate tab, then selecting the appropriate location on the page.

2. Clicking the **Add here** button will automatically add it to the homepage/dashboard and take you to that page.

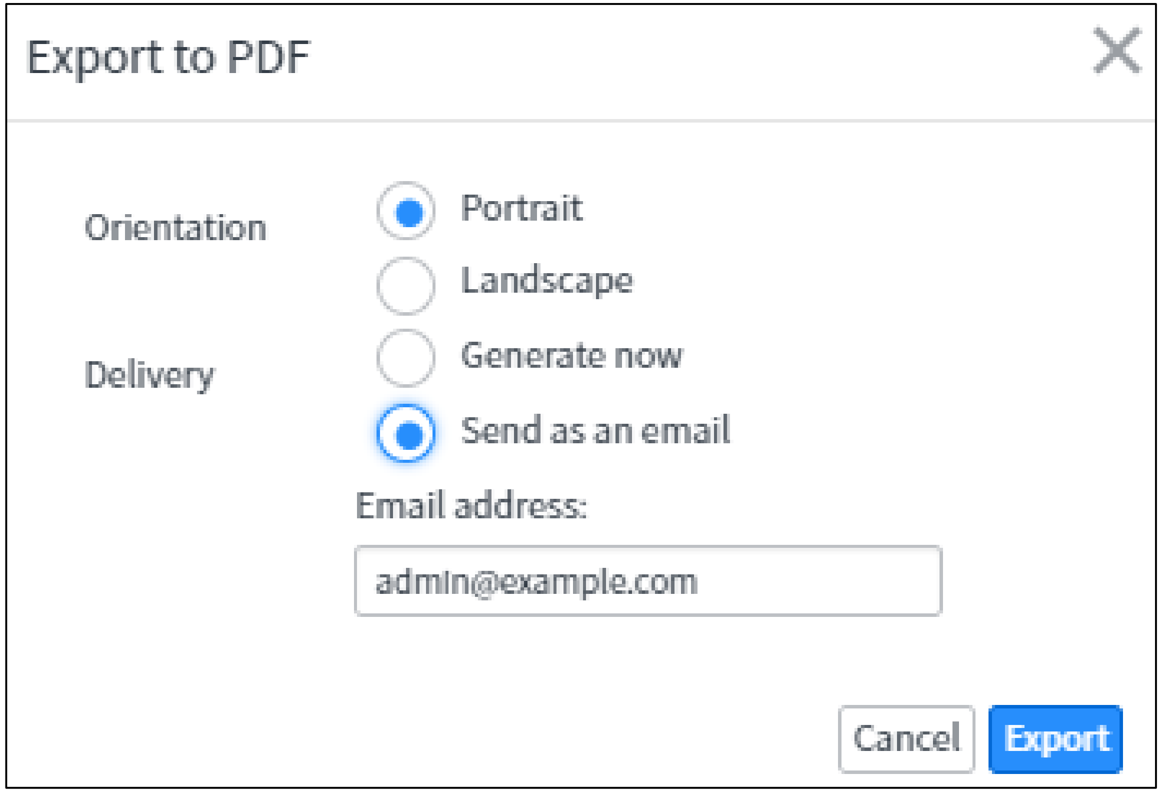


Exporting a Report to PDF

1. Clicking the **Sharing** icon will allow a report to be exported to a PDF.



2. Select Portrait or Landscape.

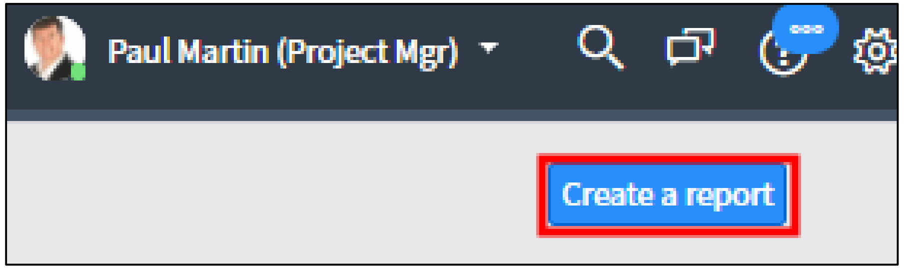


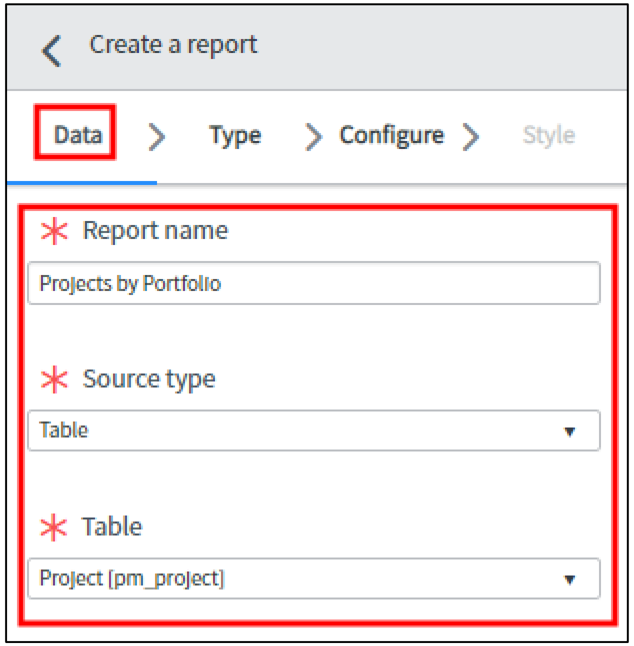
3. Next select whether you want to Generate the PDF now or send it as an email and click the **Export** button.

Creating New Reports (1)

1. To create a new report, type **View / Run** then click **Create a report**.

2. On the **Data** page, enter a **Report Name**, **Source type** (typically select Table), and then specify a table.
   a. Hint: Look in the URL of the page of the data you're trying to view in a report
3. Click the **Next** button.

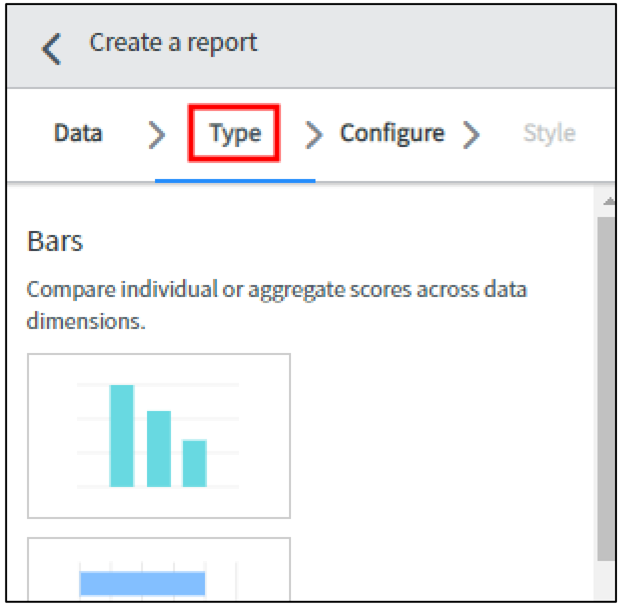




Creating New Reports (2)

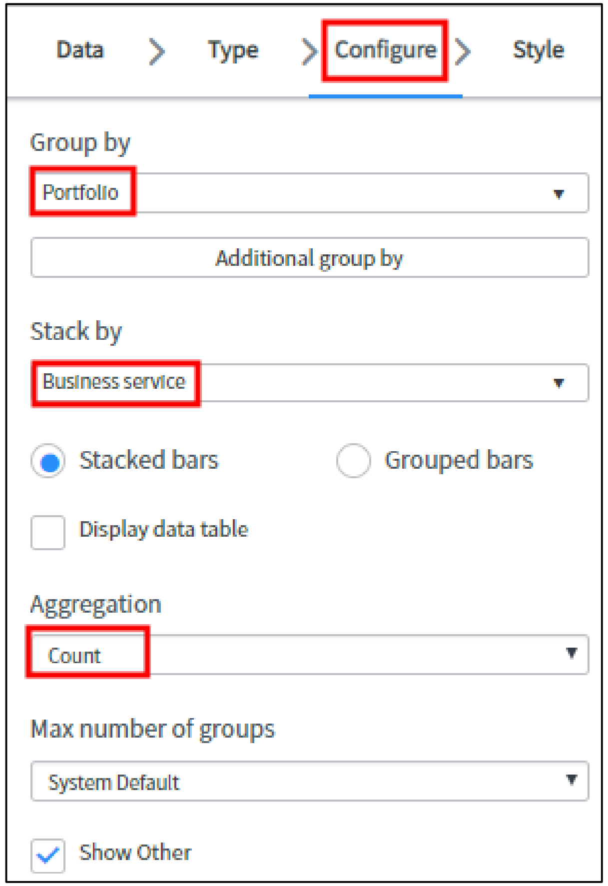
4. On the **Type** page, select the type of report you'd like to create such as:
    a. Bar Charts
    b. Pie Charts
    c. Time Based
    d. Pivot Tables
    e. Funnels and more

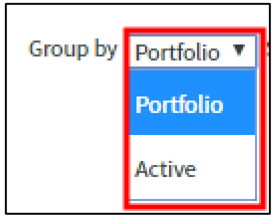
5. Click the **Next** button.



Creating New Reports (3)

6. On the **Configure** page, first select the **Group by**, in this example, Portfolio is selected. Adding "Additional group by" options adds a drop down below the graph.
7. Select a **Stack by** if desired, here Business service is selected.
8. Aggregation can be Count, Average, Sum, etc.
9. Max number of groups will determine how much is displayed on the report.
10. Click the **Next** button.





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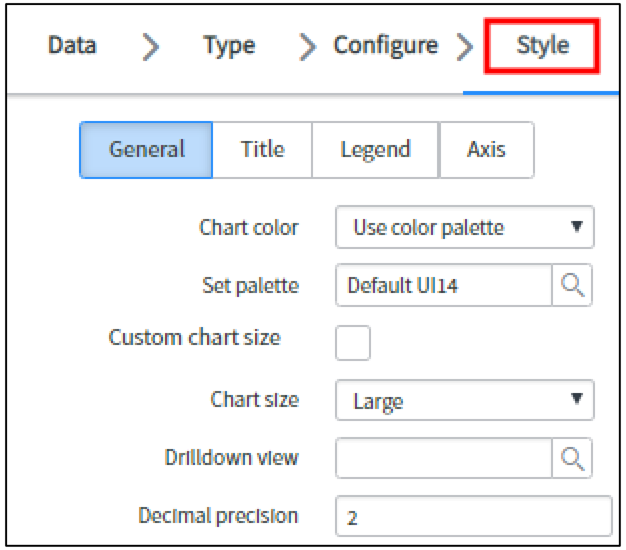
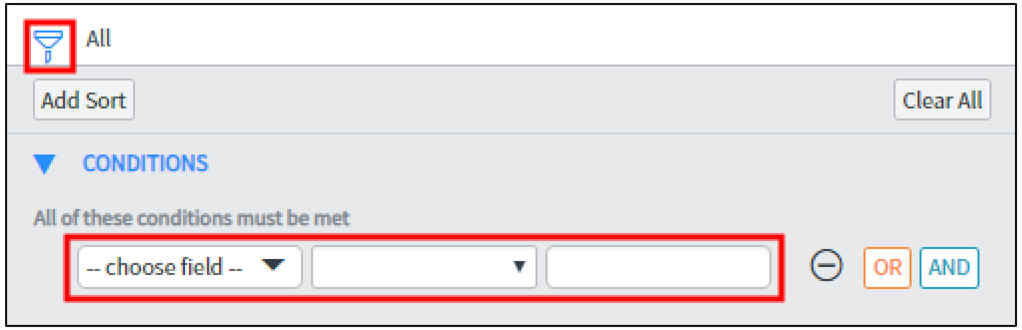
Creating New Reports (4)

11. On the **Style** page, you can select colors, chart size, decimal precision, and drilldown details.

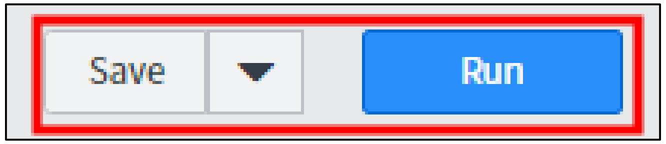


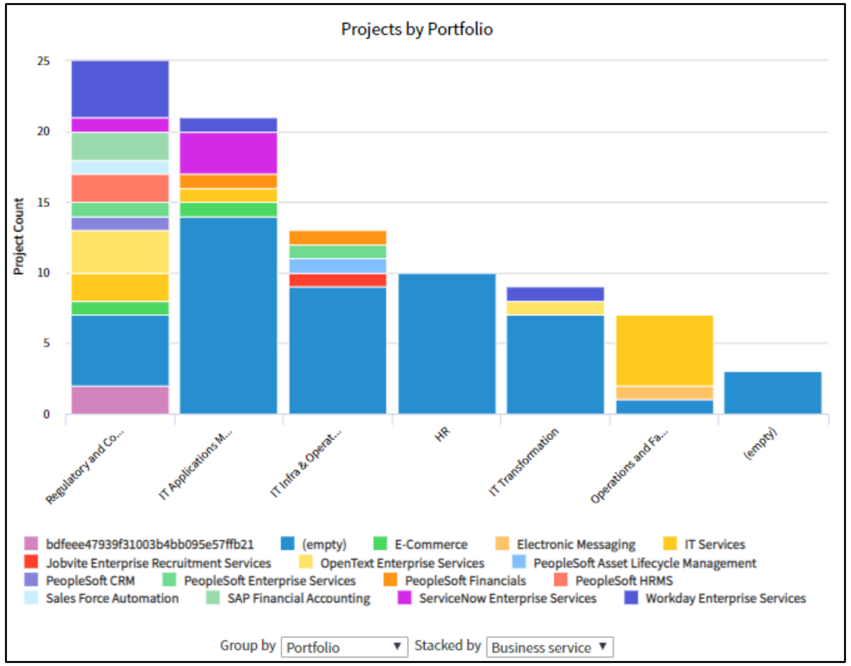
12. Click the **Filter** icon to add filter conditions as necessary to the report.



Creating New Reports (5)

13. Click the **Save** button then click the **Run** button to see the results of your report.





14. Click the **Filter** icon to add filter conditions as necessary to the report.

15. Click the **Share** button in order to share the report with other groups or users.

Questions?

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Let Rego be your guide.

Thank You For Attending regoUniversity

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**

Let us know how we can improve!
Don't forget to fill out the class survey.

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