

Jan. 2024

ServiceNow: Dashboards

COST CENTER REPORTING

Table of Contents

Accessing Your Dashboard.....	3
Add Dashboards to your ServiceNow Favorites Menu	4
Navigating the Tabs	5
General Navigation Tips	5
Reviewing and Sharing the Report Data	6
Exploring the Reports	9
Incidents Tab Reports.....	9
Requests -or- Orders Reports Tab.....	17
Users Reports Tab.....	19
Get Help	21

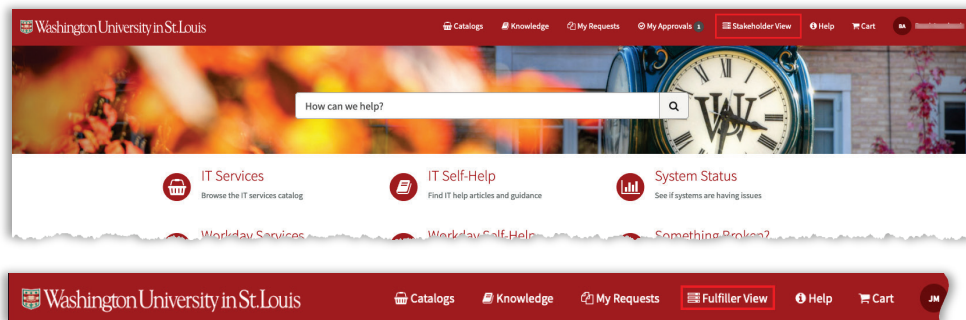
Your dashboard provides an overview of the incidents and requests for your cost center(s). All reports are filtered down to the callers cost center number.

This guide details the navigation and utilization of your ServiceNow dashboard.

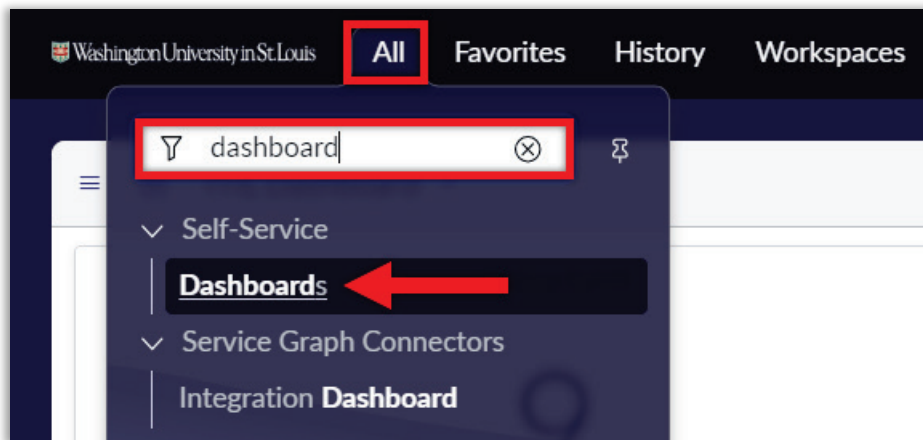
Note: Available options will vary per user license and reporting access level. All licensed ‘Business Stakeholders’ aka. ‘General Users’ can interact with the dashboard reports and view the associated ServiceNow records. Licensed ITIL users with the [proper role](#) can, in addition, write-to or edit the ServiceNow record.

Accessing Your Dashboard

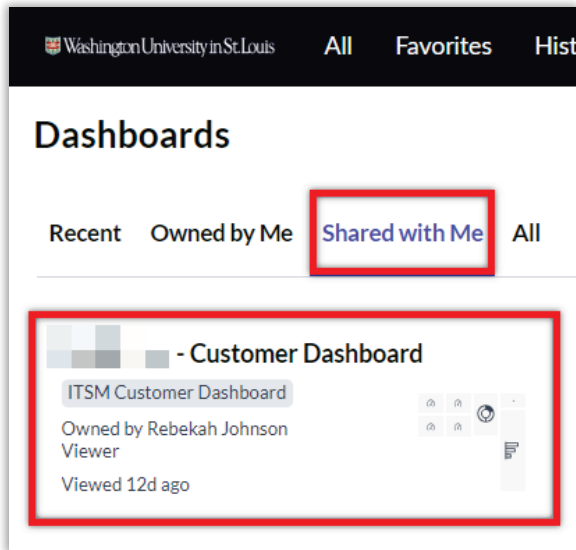
1. Log into [ServiceNow](#).
 - a. From the Portal, select **Stakeholder View** or **Fulfiller View**, depending on your license, from the top menu bar.



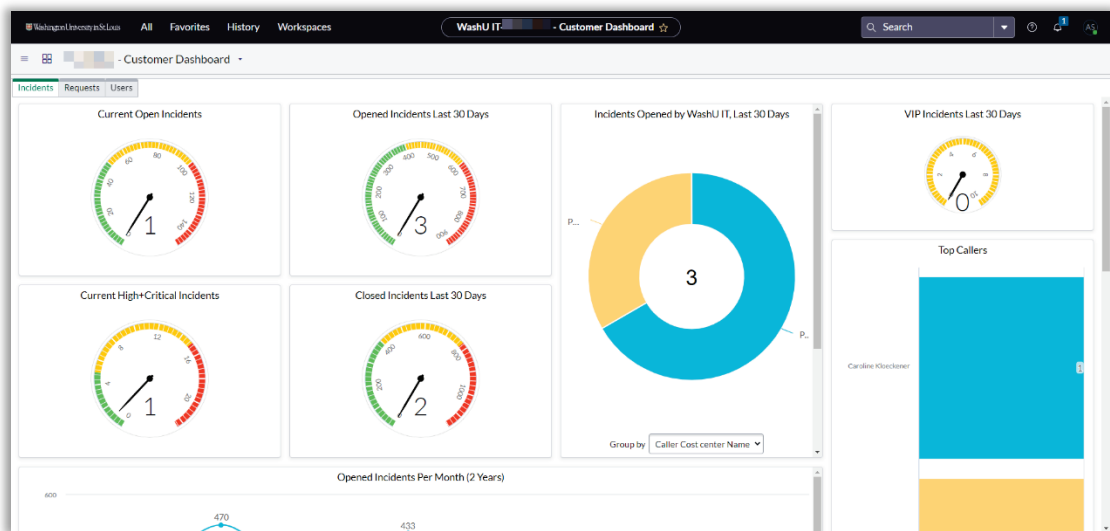
2. Select **All** on the top navigation menu, enter “Dashboards” into the filter and then select **Dashboards**.



3. In the main window select the tab labeled **Shared with Me**.
 - a. **Note:** Dashboards that have been shared with you will show up on this tab.
4. Select your “Customer Dashboard.”



5. The dashboard will open.

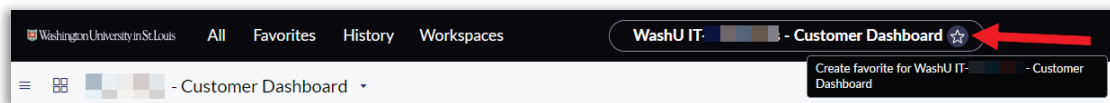


a. **Note:** You should see your dashboard the next time you log in without having to navigate to it.

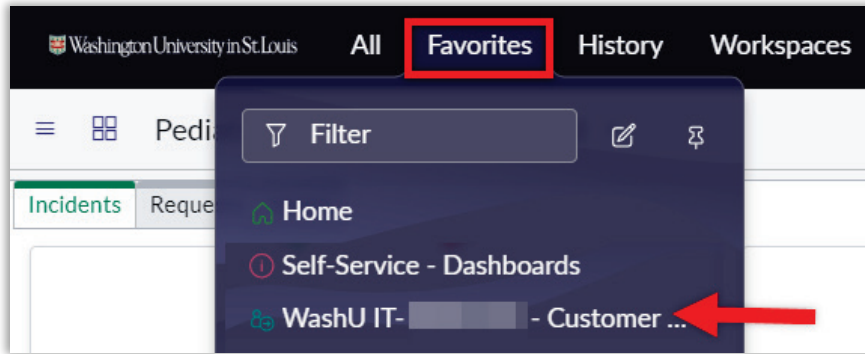
Add Dashboards to your ServiceNow Favorites Menu

If you have access to multiple dashboards, you can favorite the dashboards to quickly navigate to them in the future.

1. While viewing a dashboard, select the star next to the name of the dashboard in the top navigation bar to add it to your Favorites.

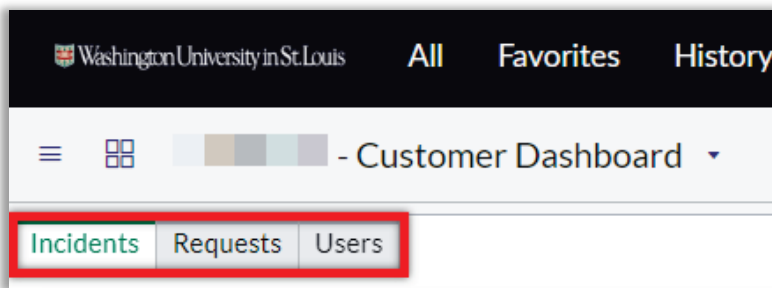


2. Access your favorited dashboards through **Favorites** in the top navigation bar.



Navigating the Tabs

The tabs show near the top left of the main dashboard window. Most dashboards will contain, minimally, an Incidents and Orders or, Requests tab. There may be additional or different tabs depending on your needs. The tab name reflects the type of report(s) you can expect to find on that tab. i.e., the Incidents tab contains reports regarding incidents tied to your Cost Center.

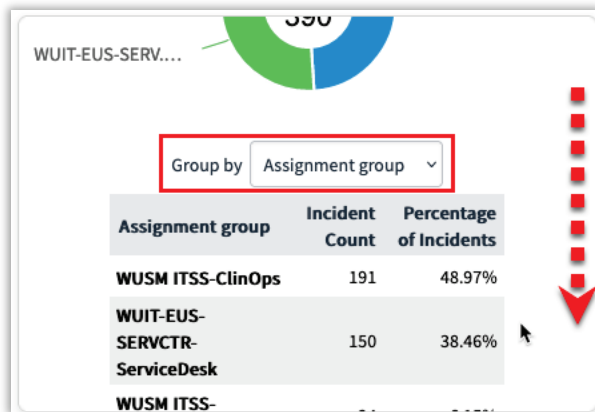


General Navigation Tips

There are several visual representations of the data or, reports, such as a gauge graph, pie chart, line graph, and bar chart. Below are some tips for interacting with the different reports.

1. Some reports may require scrolling within the individual report window to view additional data below the visible part.

- Use the 'Group by' option to see the data in different formats, grouped by the topic of choice.



- Some reports offer options to expand and view more details. When there is an interactive right-facing arrow, toggle it to view the additional details.

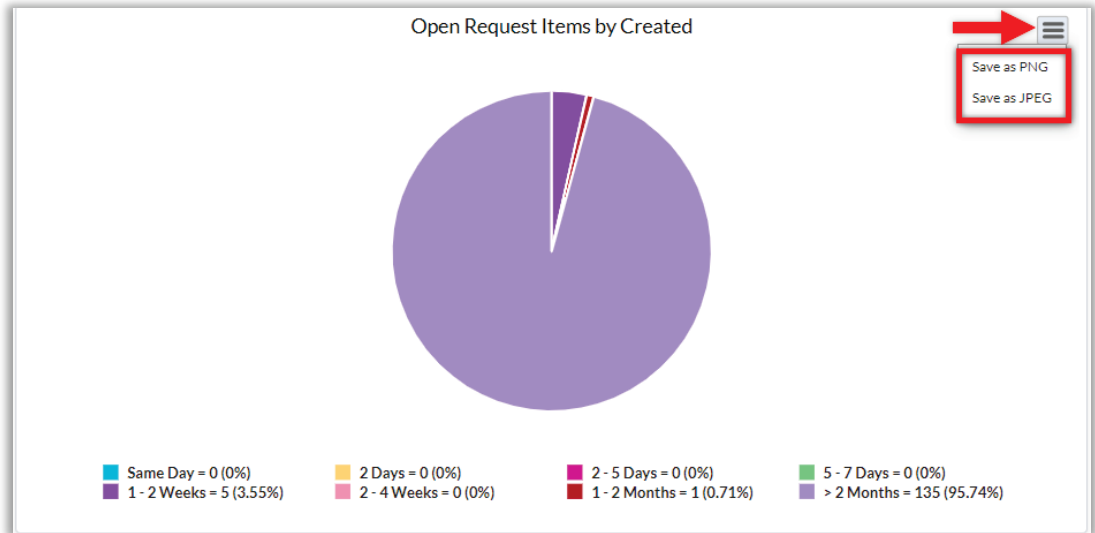
State	Approver	Approval for	Requested for	Cost center
▶ Approver: [bar] (2)				
▶ Approver: [bar] (2)				
▶ Approver: [bar] (6)				
▶ Approver: [bar] (1)				

- Tables or List-Views allow for sorting by header variable, click on the header for the column you wish to sort by for ascending order. Click it again for descending order.

Number	Opened	Item	Short description
RITM0242203	01/11/2024 11:04:32 AM	Logitech H570e Headset	H570e Headset
RITM0242202	01/11/2024 11:04:32 AM	Dell Latitude 7440 (Standard)	Dell Latitude 7440 (Standard)

Reviewing and Sharing the Report Data

- Save a graph image to be used in a document or email.
 - Hover over the upper right corner of the report window and the hamburger menu will appear.
 - Save a copy of the chart by selecting Save as JPEG or Save as PNG.



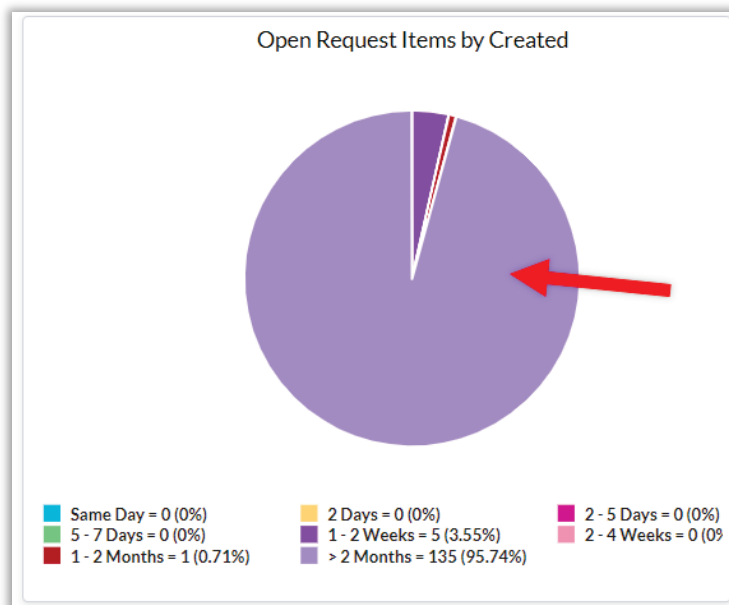
i. The file will save in your default downloads location.

2. Copy and paste any table report.

- Use your cursor to highlight the data in any of the list-view or report tables and then copy and paste it into another document or email.
- Note:** It's important to keep in mind what filters were used to pull the data when sharing report results, if unsure, submit a catalog request for the report filter information before sharing.

3. To view the filter parameters

- When available, click on a data point or section in the dashboard report to get the associated list-view.



b. The filter parameters show at the top of the window.

Requested Items Opened Search Actions on selected rows...

All > State in (Open, Work in Progress) >
 Request Requested for Cost center Organization ID in *CC0004463, CC0004467, CC0004473, CC0004470, CC0004465, CC0004476, CC0004478, CC0004475, CC0004464,
 > Created <= 11/23/2023 10:07:38 AM > Created > 09/05/1996 11:07:38 AM

Number	Opened	Item	Stage	Request	Requested for	Opened by	Quantity	Due date
RITM0241901	11/17/2023 08:42:04 AM	Workday General Request	🟢🟡🟠	REQ0215646			1	11/22/2023 08:42:04 AM
RITM0241900	11/17/2023 08:39:57 AM	Dell Latitude 7440 (Standard)	🟡🟠🟡🟠🟡	REQ0215645			1	11/17/2023 08:39:56 AM
RITM0241899	11/17/2023 08:39:38 AM	Workday General Request	🟢🟡🟠	REQ0215644			1	11/22/2023 08:39:38 AM
RITM0241861	11/17/2023 07:22:03 AM	General Access & Security	🟡🟠🟡🟠🟡	REQ0215607			1	11/17/2023 07:22:03 AM

c. You can interact with the filters and column settings for your list-view.

Requested Items Opened Search Actions on selected rows...

Run Save... AND OR Add Sort

Adjust the Filters

All of these conditions must be met

State is one of Open, Work in Progress, Closed, Complete, Closed Incomplete

Request.Requested for.Cost... is one of *CC0004463, CC0004467, CC0004473, CC0004470, CC0004465

Created at or before 11/23/2023 05:12:03 PM

Created after 09/05/1996 05:12:03 PM

All > State in (Open, Work in Progress) >
 Request Requested for Cost center Organization ID in *CC0004463, CC0004467, CC0004473, CC0004470, CC0004465, CC0004469, CC0004476, CC0004478, CC0004475, CC0004464, [...]
 Created <= 11/23/2023 11:12:03 AM > Created > 09/05/1996 12:12:03 PM

Number	Opened	Item	Stage	Request	Requested for	Opened by	Quantity	Due date	Assignment group
RITM0241901	11/17/2023 08:42:04 AM	Workday General Request	🟢🟡🟠	REQ0215646			1	11/22/2023 08:42:04 AM	(empty)

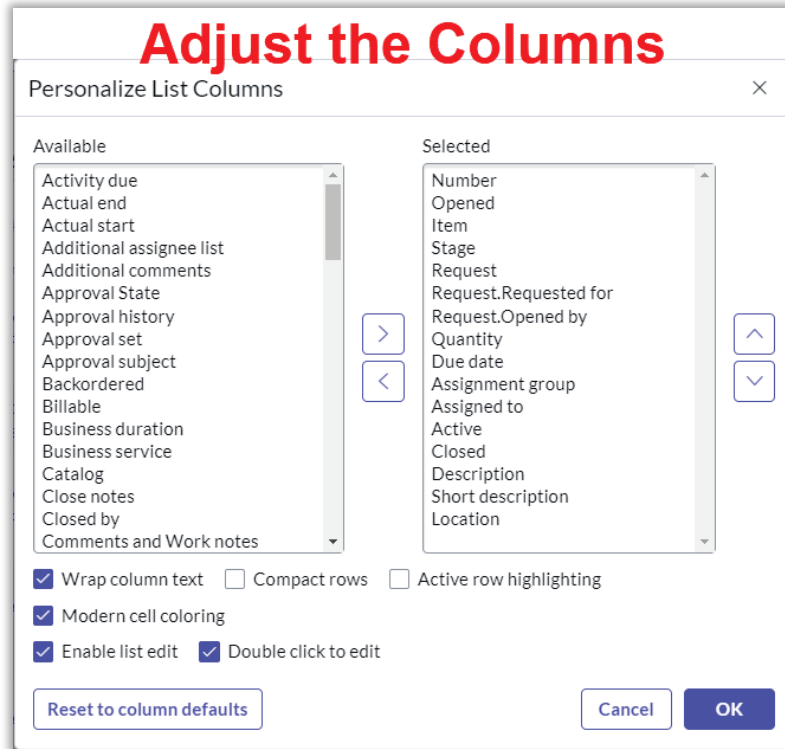
Requested Items Opened Search Actions on selected rows...

Adjust the Columns

Update Personalized List

All > State in (Open, Work in Progress) >
 Request Requested for Cost center Organization ID in *CC0004463, CC0004467, CC0004473, CC0004470, CC0004465, CC0004469, CC0004476, CC0004478, CC0004475, CC0004464, [...]
 Created <= 11/23/2023 11:12:03 AM > Created > 09/05/1996 12:12:03 PM

Number	Opened	Item	Stage	Request	Requested for	Opened by	Quantity	Due date	Assignment group
RITM0241901	11/17/2023 08:42:04 AM	Workday General Request	🟢🟡🟠	REQ0215646			1	11/22/2023 08:42:04 AM	(empty)

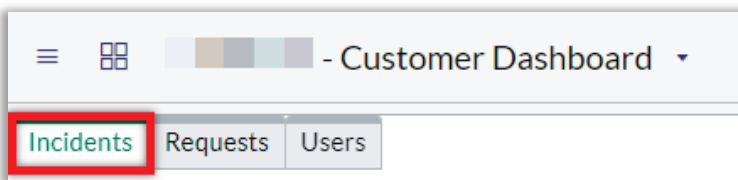


- i. **Note:** When editing the report filters in your list-view, know that it will not save, nor will it affect the dashboard report; the report will reset to its default settings upon exiting the view.
- ii. When editing your list-view column settings, the settings will save for your future list-view of the report edited.

Exploring the Reports

The actual reports for your dashboard(s) may vary. The information provided below is a representation of the available and widely used reporting styles used in many WashU ServiceNow dashboards.

Incidents Tab Reports

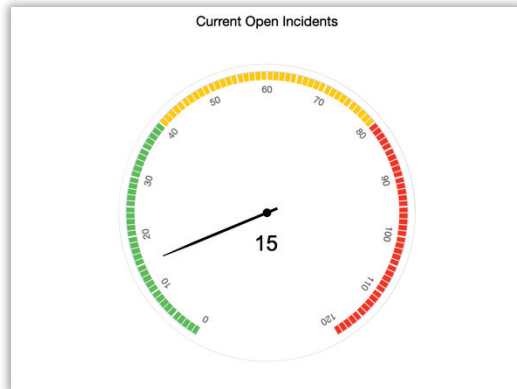


The Incidents tab contains reports for the incidents that were logged into ServiceNow for your cost center(s). The reports provide a high-level view of information, such as how many incidents are currently opened, how many were closed in the last 30 days, and how many VIP incidents have been opened in the last 30 days.

Below is a listing of the incident reports that make up your dashboard, along with a brief description of each report. All the reports on the Incidents tab are set to capture only your cost center(s).

1. Gauge graph reports:

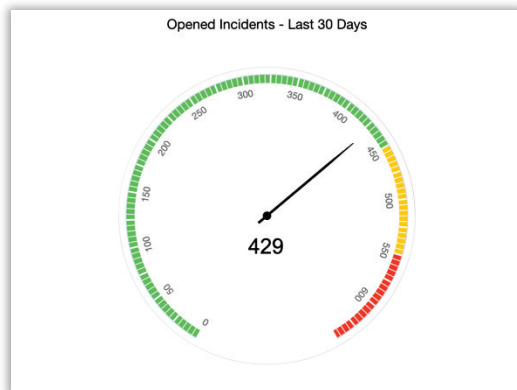
- a. **Current Open Incidents** displays the total number of incidents that are currently in the open state.



- b. **Current High & Critical Incidents** displays the total number of currently open incidents that are classified as high or critical priority.



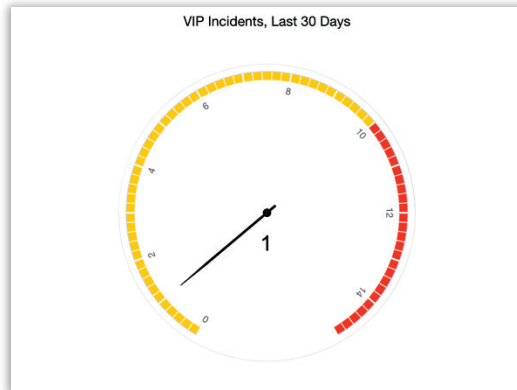
- c. **Opened Incidents - Last 30 Days** displays the total number of incidents that have been opened in the last 30 days, regardless of their current state.



- d. **Closed Incidents, Last 30 Days** displays the total number of incidents that were closed within the last 30 days.

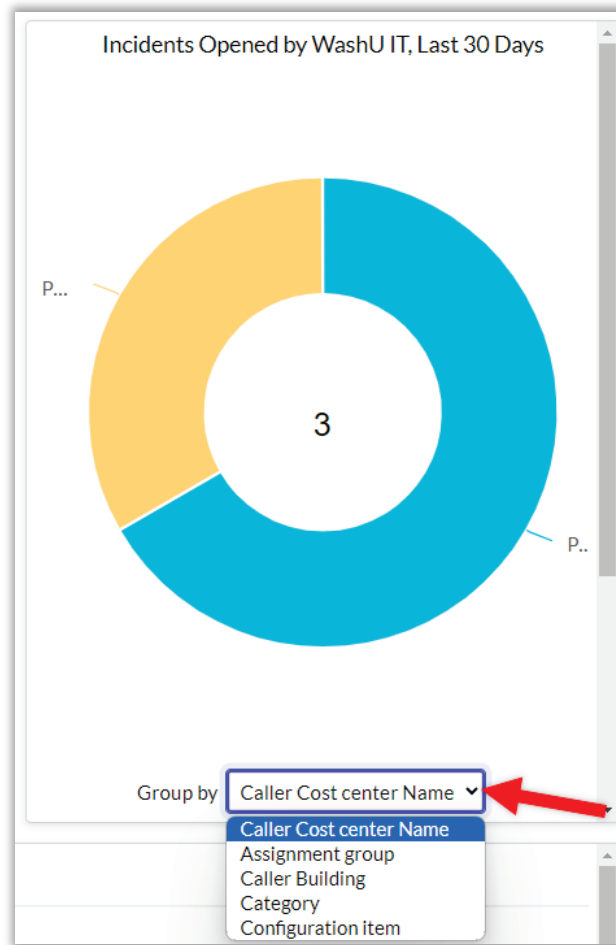


- e. **VIP Incidents, Last 30 Days** displays the total number of incidents that were opened within the last 30 days for a VIP and are currently in the open state.

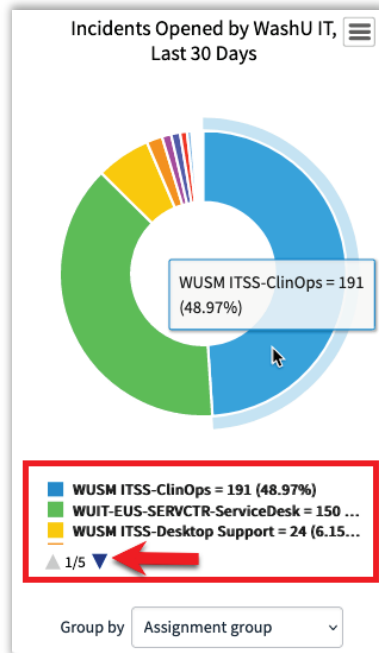


2. Pie chart reports

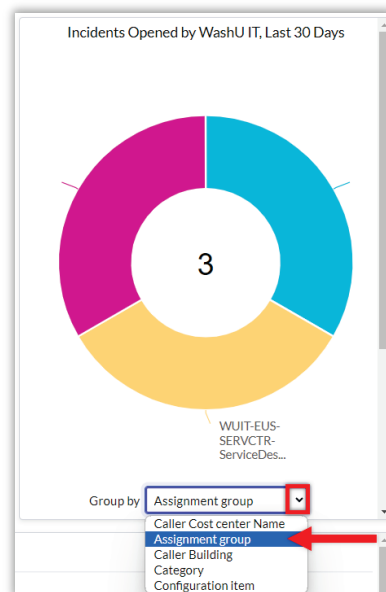
- a. **Incidents Opened by WashU IT, Last 30 Days** displays the total number of incidents opened within the last 30 days, regardless of their current state, sorted by the selection chosen from the 'Group by' dropdown menu.
- i. Use the 'Group by' drop-down to select how you wish to sort and view the report.



- ii. Available 'Group by' options are:
 1. Caller Cost Center Name (your cost center)
 2. Assignment Group (what ServiceNow group the incident is assigned to)
 3. Caller Building (not currently used for some groups)
 4. Category (ServiceNow Category, e.g., Hardware and Network)
 5. Configuration Item (ServiceNow config. item. e.g., laptop, printer, software, EPIC, and email)
- iii. Hover over the section of the pie chart to view the total numbers.
- iv. See the key below the pie chart for the list of variables and associated graph color. You may need to use the up or down navigation arrows to view the entire list.

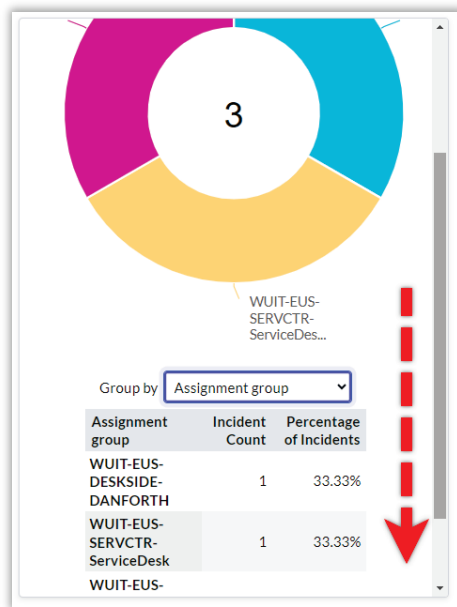


- b. **Incidents Opened Last 30 Days – By Assignment Group** displays the total number of incidents opened within the last 30 days, regardless of their current state, sorted by the selection chosen from the ‘Group by’ dropdown menu.
- Use the ‘Group by’ drop-down to select how you wish to sort and view the report.

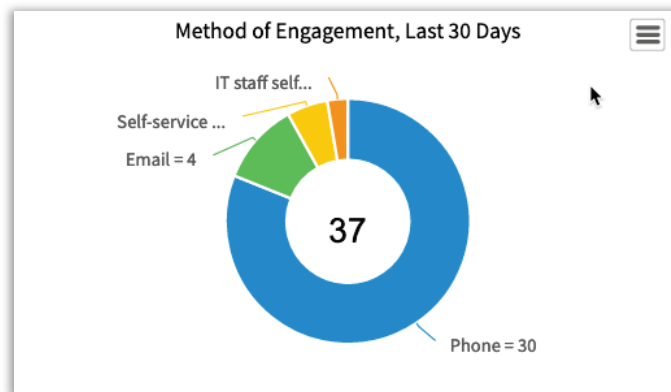


- Available ‘Group by’ options are:
 - Assignment Group (the ServiceNow group that the incident is assigned to)

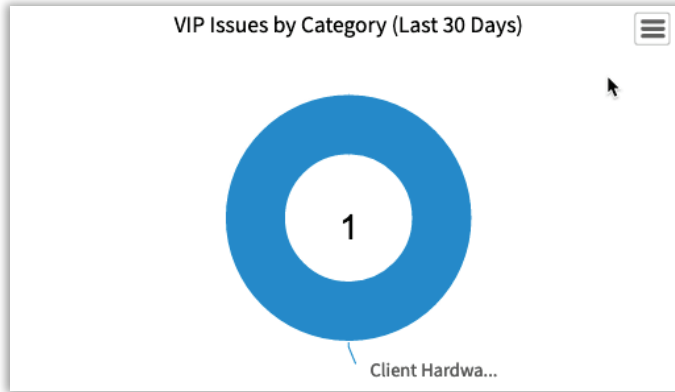
2. Cost Center (the caller's listed cost center)
 3. Category (ServiceNow Category, e.g., Hardware and Network)
 4. Caller Building (not currently used for some groups)
 5. Configuration Item (ServiceNow config. item. e.g., laptop, printer, software, EPIC, and email)
 6. State (current state of incident, e.g., opened or closed)
- iii. Hover over the section of the pie chart to view the total numbers.
 - iv. See the table below the pie chart for the list of variables and associated numbers. You may need to scroll up or down to view the entire list.



- c. **Method of Engagement, Last 30 Days** displays the total number of incidents that have been opened in the last 30 days, regardless of their current state, shown sorted by how the incident was generated.



- d. **VIP issues by Category (Last 30 Days)** displays the total number of incidents that have been opened in the last 30 days, regardless of their current state, sorted by the ServiceNow category (i.e., Hardware, Network, etc.).

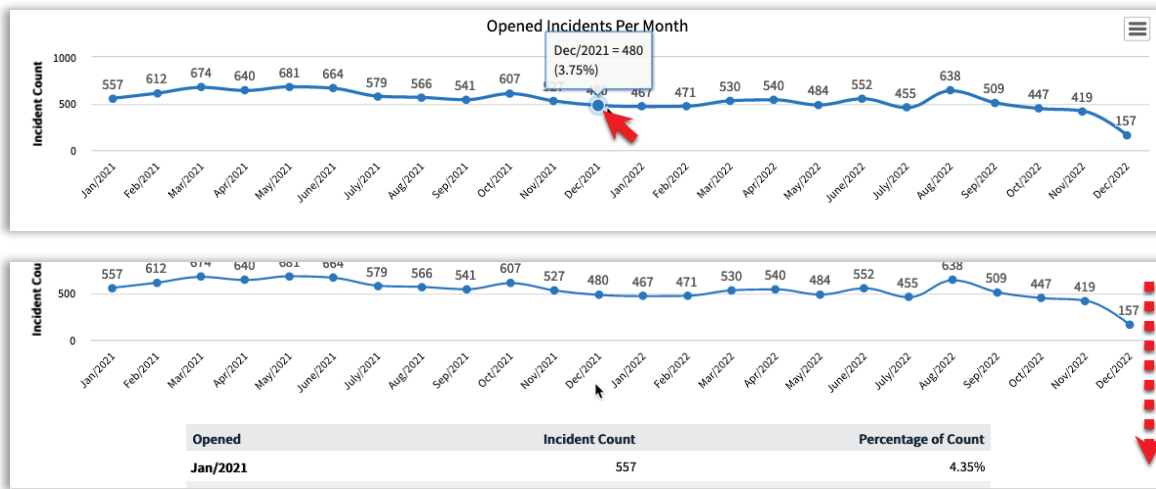


3. Line graph reports:

- a. **Opened Incidents Per Month** displays the history of how many incidents have been opened during the month listed, regardless of their current state.

- i. Hover over the month/dot on the graph to view the number & percentage.

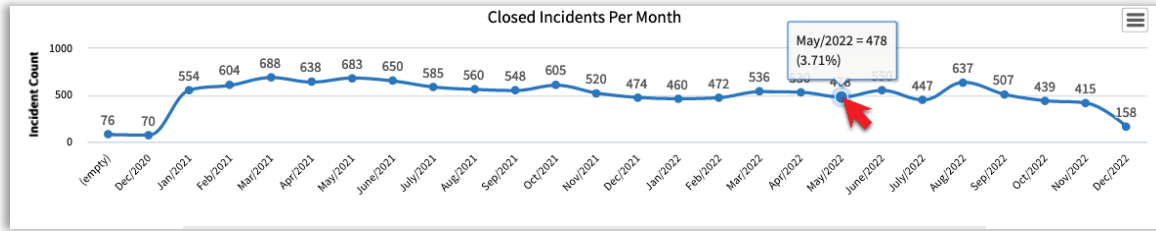
- ii. Scroll down to see the data in table format



- a. **Closed Incidents Per Month** displays the history of how many incidents have been closed during the month listed regardless of when they were opened.

- iii. Hover over the month/dot on the graph to view the number & percentage.

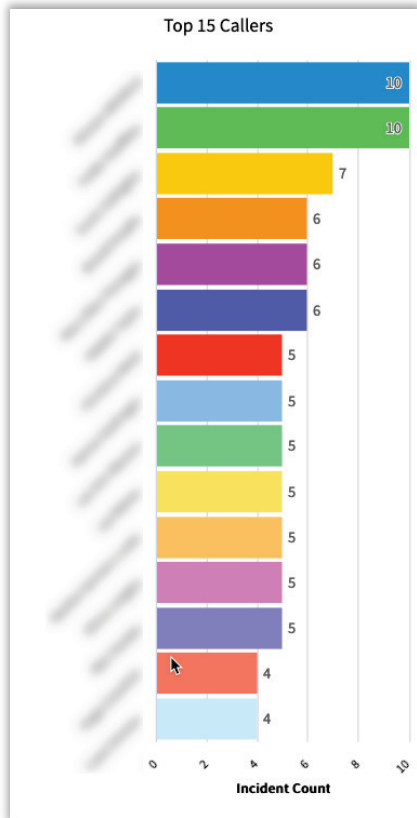
- iv. Scroll down to see the data in table format



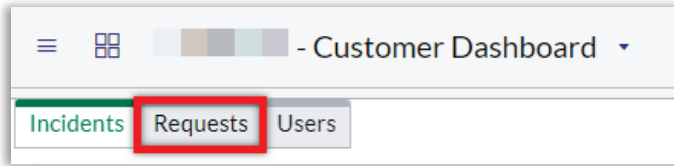
Resolved	Incident Count	Percentage of Count
(empty)	76	0.59%
Dec/2020	70	0.54%
Jan/2021	554	4.3%

4. Bar chart reports:

- a. **Top 15 Callers** displays the callers (15) with the greatest number of incidents created within the past 30 days. This graph displays the callers' name and their total number of incidents.
 - i. Hover over the bar on the graph to see the percentage, based on the total incidents from the top 15 callers.



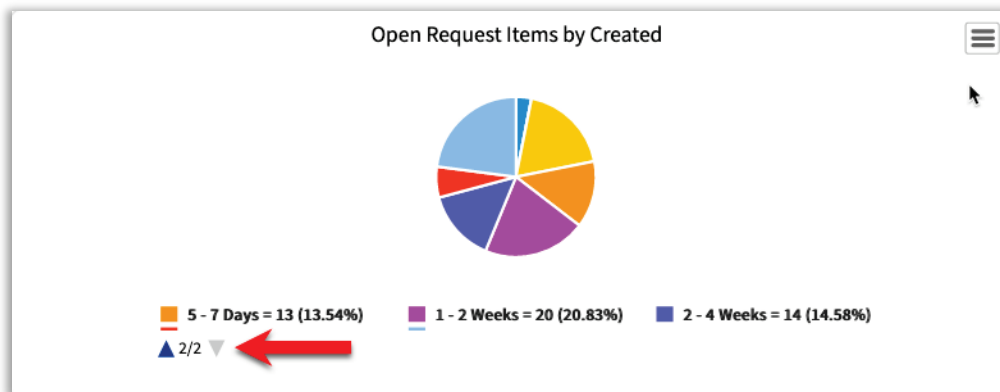
Requests -or- Orders Reports Tab



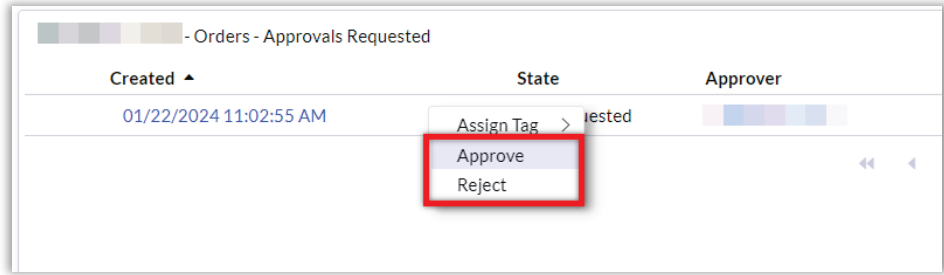
The Requests, aka; Orders tab contains reports for the requests and associated requested items that were logged into ServiceNow for your cost center(s). A request is the high-level information about the “order” which may contain several items. The reports provide information, such as the length of time that requests have been open, open requests by caller, item information and an item’s current stage in the process. It also shows which requests are currently holding for an approval. An approver can approve the request directly from the dashboard.

Below is a listing of the orders reports that make up your dashboard, along with a brief description of each report. All the reports are set to capture only your cost center(s).

1. **Open Request Items by Created** displays how long a request has been opened, grouped by the timeframe that it has been opened. You may need to use the up or down navigation arrows to view the entire list.



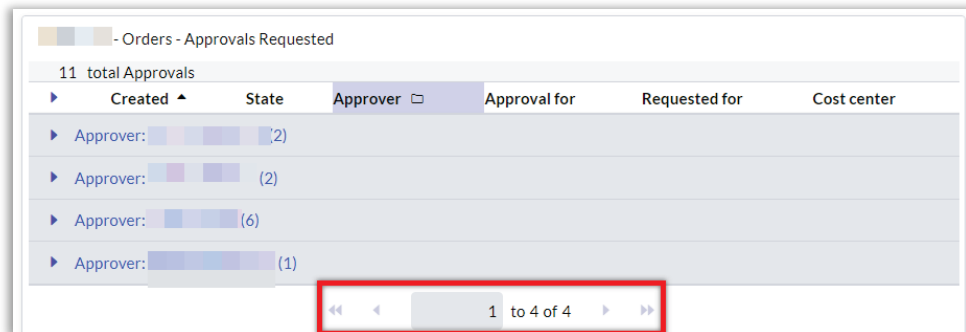
2. **'Cost Center Name' - Orders - Approvals Requested** displays a list of Requested-state orders, or requests (REQ), meaning this list shows all requests that are holding on approvals. The number of open requests appears next to the approvers name.
 - a. Approvals occur at the request level. An approver can approve the request directly in the dashboard. To approve or reject the request:
 - i. Right-click anywhere on the line item, or row, and select **Approve** or **Reject**.



- b. Use the toggle arrow in the header row to expand all groups and show the details for all approvers -or- select the toggle arrow next to the approver that you wish to see the details for.



- c. Column data includes:
- Created (date created)
 - State (where the request is in the overall process)
 - Approver (who needs to authorize the request)
 - Cost Center (the requestor's cost center)
 - Approval for (the ServiceNow request number)
 - Requested for (who the request is for)
- d. Depending on the quantity of records, you may need to scroll down and then select the page-over arrows near the bottom-right of the window.



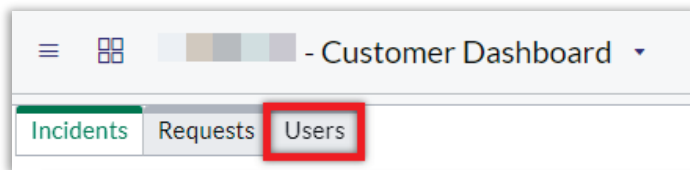
3. **'Cost Center Name' – Open Items on Order** displays a list of requested items (RITM) from a request (REQ) that are in the open state. This table includes what stage the item is within the overall process, which may vary from item to item depending on the fulfillment needs.

- a. Use the toggle arrow in the item row in the stage column to view details regarding what stage the item is in the process.

Number	Opened	Item	Short description	Request	Requested for	Name	Stage
RITM0242204	01/11/2024 11:04:32 AM	Dell Wireless Keyboard/Mouse Combo	Dell Wireless Keyboard and Mouse	REQ0215898			Waiting for Approval (In progress) Approvers <input type="checkbox"/> (Requested) <input type="checkbox"/> (Requested) <input type="checkbox"/> (Requested) <input type="radio"/> Preparing the Item (Pending - has not started) <input type="radio"/> Transfer to Local Carrier (Pending - has not started) <input type="radio"/> Pending Customer Receipt (Pending - has not started) <input type="radio"/> Invoicing (Pending - has not started) <input type="radio"/> Completed (Pending - has not started)

- b. Column data includes:
 - i. Number (RITM#, the request item number)
 - ii. Opened (date & time opened)
 - iii. Item (the item)
 - iv. Short Description (item info)
 - v. Request (the associated request (REQ) number)
 - vi. Requested for (who the item is requested for)
 - vii. Name (requested-for persons' cost center)
 - viii. Stage (where the item is in the overall process, may vary by item)
 - ix. State (current state of item (RITM) e.g., Open or Closed)

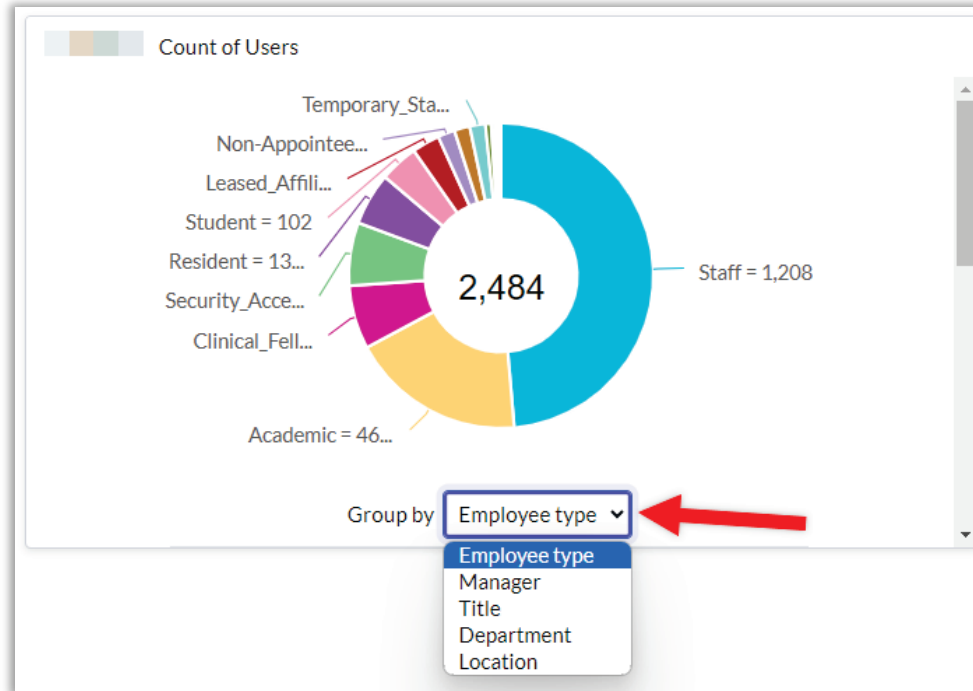
Users Reports Tab



The Users tab contains reports for the users assigned to your cost center(s).

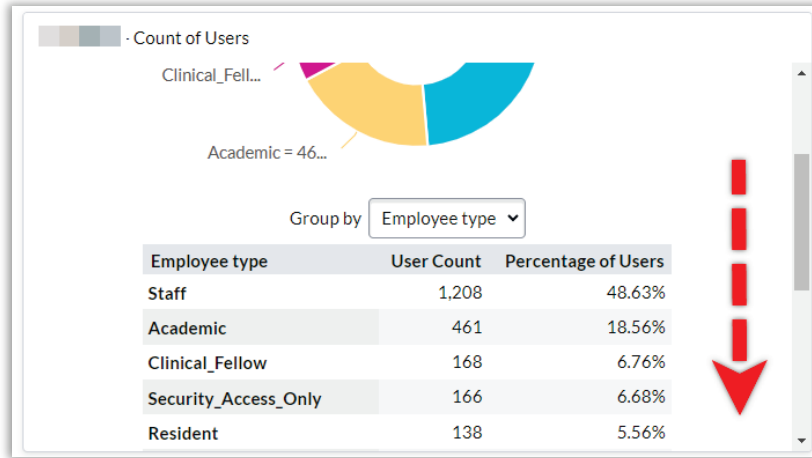
Below is a listing of the Users reports that make up your dashboard, along with a brief description of each report. All the reports are set to capture only your cost center(s).

1. **'Cost Center Name' - Count of Users** displays the count of users for your cost center(s).
 - a. Use the 'Group by' drop-down to select how you wish to sort and view the report.

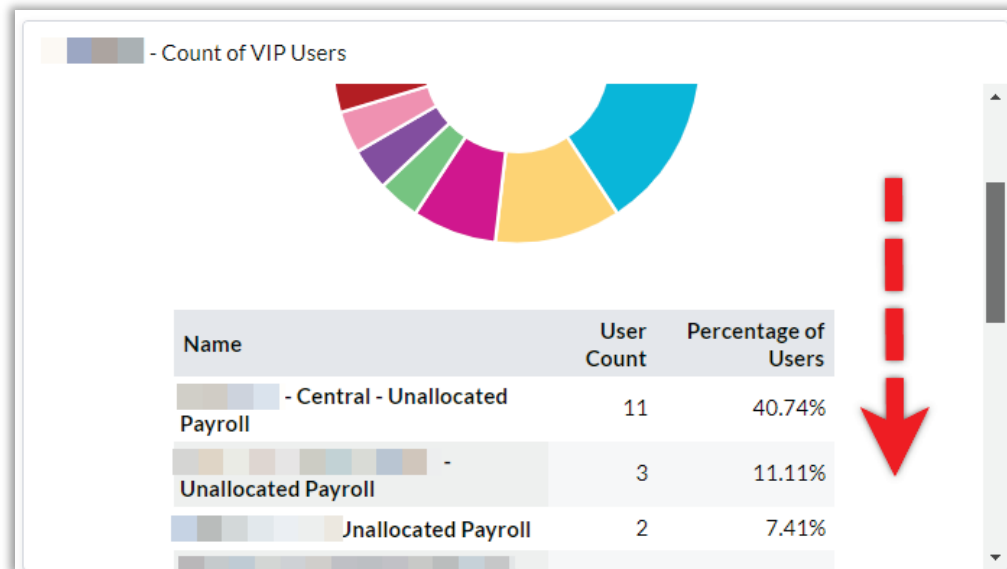


- i. Available 'Group by' options are:
 1. Employee type
 2. Manager
 3. Title
 4. Department
 5. Location
- b. Hover over the section of the pie chart to view the total numbers.

- c. See the table below the pie chart for the list of variables and associated numbers. You may need to scroll up or down to view the entire list.



- 2. **'Cost Center Name' – Count of VIP Users** provides a total count of users who are assigned the VIP role in ServiceNow broken down by cost center.
 - a. Hover over the section of the pie chart to view the total numbers.
 - b. You may need to scroll up or down to view the entire list.



Get Help


If you would like to add a user, share a dashboard, request a report to be periodically emailed, need information regarding what filters are being used in a report, or need additional assistance, submit the [Reporting and dashboards catalog item in ServiceNow](#).

Home > All Catalogs > Information Technology > IT Professional Services > ITSM > Search C

Reporting & Dashboards

Reporting & Dashboards

Dashboards and Reports Using ITSM Tools



Request assistance with creating or modifying reports and dashboards based on ServiceNow data.


For reports and dashboards that need to be filtered to an operational group or school, please use the field below to include the **exact cost center numbers** you wish to have included.

Please attach any supporting screenshots or documents.

* Items needed (select all that apply)

- New report(s) creation
- Modifications to existing report
- New dashboard(s)
- Modifications to existing dashboard(s)

* Describe your needs

 Add attachments

There is more information on the [Dashboards webpage](#) including:

- About Dashboards
- Link to L@W class
- FAQ's
- Link to this User Guide
- Get Help - link to catalog request item