Capstone Project: Task 6 Solution

Schedule a Visualization

Instructions: Work with the Visualization Designer to create a chart which displays the number of incidents that are active and tied to the sFone category. Additionally, group the data by priority.

Schedule the report by sharing it with the Strawberry Support group every Monday to coincide with their incident review meeting.

> **Note:** *Refer to Module 6: Enable Productivity*

A. Create a Report

1. Navigate to **Platform Analytics > Library > Data Visualizations > select New**.

2. The Visualization Designer displays.
3. Select **Add data source**.
4. Select **Incident [incident]** as the Table.
5. Select **Add this source**.
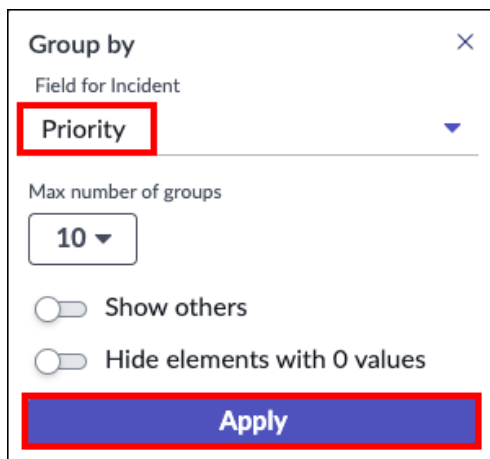6. Add the name: **Active sFone Incidents by Priority**.

Details

Name ✳ ⓘ

Active sFone Incidents by Prioirty

7. Select **Pie chart** under Visualization type.
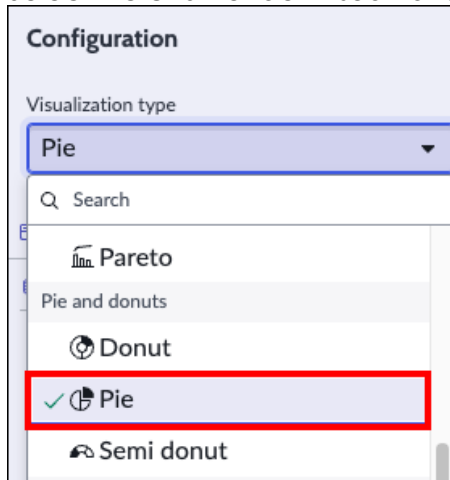
8. Change the Group by drop-down from Active to select **Priority**. (**Note**: Remove the Active field from Group by, then add Priority in its place). Select **Apply**.
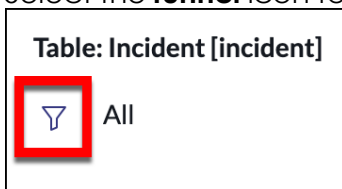

9. Select **Save**. Change the Visualization name to **Active sFone Incidents by Priority.** Select **Save**.

Active sFone Incidents by Priority
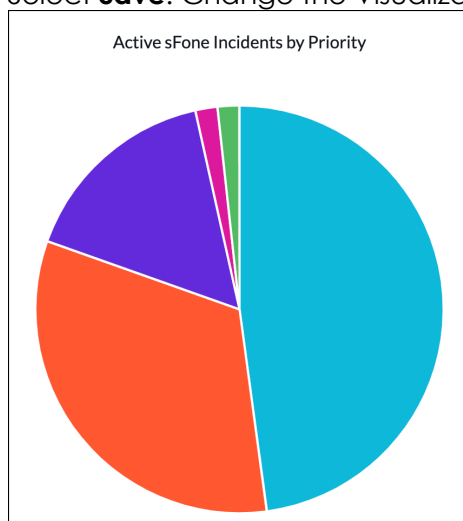
Note: *You can hover over and select each section of the pie chart to get a closer look at the data.*
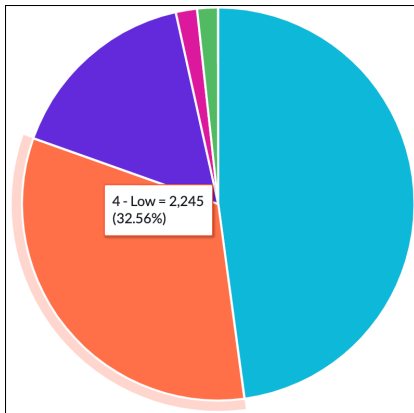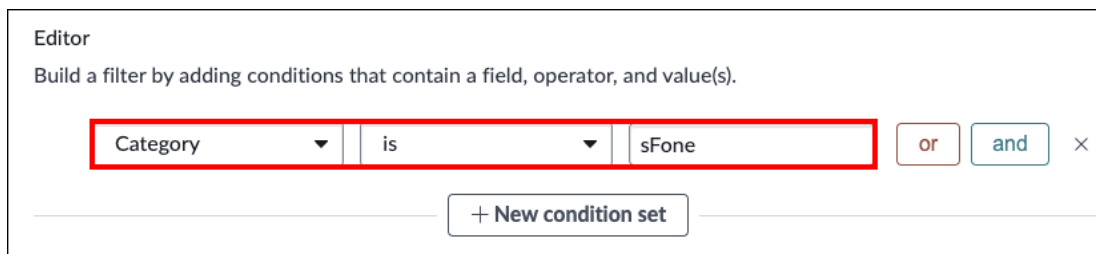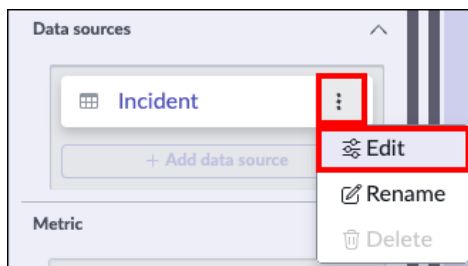

10. Select the **funnel** icon to open the Condition Builder.

11. Under Data sources, select the menu to Edit the Incident data source. Set the custom condition:
   - **Category | is | sFone.**

12. Select **Apply.**

B. Schedule the visualization

Now that the chart has been created, any new data that is collected in the instance matching the filter requirements will display when the visualization runs. Scheduling it will allow this information to be shared with the appropriate stakeholders.

1. With the Active sFone Incidents by Priority report open in the Visualization Designer, open the **More actions menu**, then select **Share**.
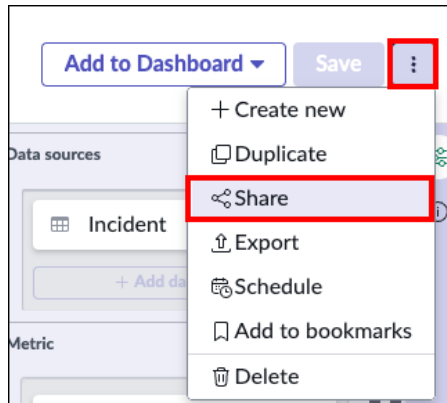
2. **Grant access to Strawberry Support**, then select **Confirm**.
3. Open the **More actions menu** again to **Schedule** the visualization.
4. Populate the form as follows:
    a. Reoccurrence: **Weekly**
    b. Day of the Week: **Monday**
    c. Time: **08:30:00**
    d. Recipients: **Strawberry Support**
    e. Subject: **Current sFone Active Incidents Count**
    f. Introductory message:
        Please find included the current count of all active sFone incidents grouped by priority. This information will be discussed during the team's incident review meeting today at 9:00am.

5. Select **Save and close**.

TASK VERIFICATION

1. Confirm the chart appears as follows and is scheduled.

1 - Critical = 1 (50%)   5 - Planning = 1 (50%)