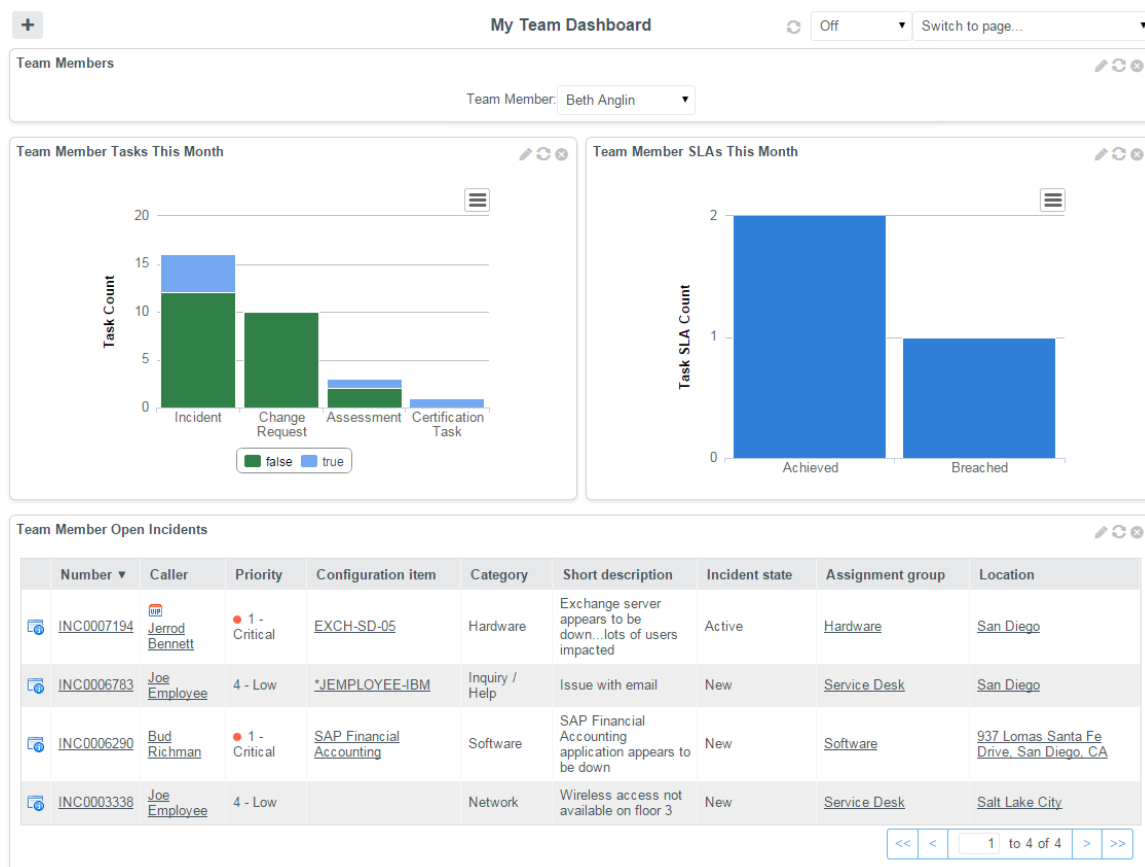


Interactive Homepage Controls

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Description

ServiceNow homepages/dashboards are a great feature leveraged by all users of the platform. A common request is for team managers wanting to view various types of metrics for individual team members. Unfortunately there is not out of the box mechanism to make interactive homepages where you can choose a value and the homepage dynamically updates the reports based on the value chosen. That is until now!



In the above screenshot, the My Team Homepage has a control gauge called Team Members at the top. This is a list of the logged in User's team members. As the user selects a different team member, the three gauges below will dynamically update based on the team member chosen. This example homepage is included in this update set.

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This update set includes a Homepage Controls module that will appear in the Homepage Admin application. A homepage control record will automate the creation of the necessary components to allow you to create your own interactive homepages for your users. In the homepage control record, you define what selection values you want to have in the control gauge and once created the required UI Page utilized by the homepage gauge is created automatically. From there you create the reports that will leverage the chosen value in the control gauge.

Installation & Configuration

Important Note: Out of the box ServiceNow caches the homepage gauges for 60 seconds. In order to make this functionality work, the update set is turning off the homepage render cache by setting the glide.render.cache.enable System Property to false. This change could cause system performance issues so please thoroughly test before loading this into your production environment. You can read more about Homepage caching here:

http://wiki.servicenow.com/index.php?title=Homepage_Caching

Included is the update set that has the necessary code. Import the update set, preview, and then commit it.

Once you commit the update set, you will find a new module under the Homepage Admin application called Homepage Controls. This will automate the creation of the control gauges for your homepages.

- At the top of the Homepage Control record you will find an annotation that explains all the fields in the record:
 - Name: Descriptive name for your control that users will see when adding the control to a homepage. This must be unique and you will receive an error if you use the same name.
 - Gauge Choice Label: This will be the label of the select box on the control gauge.
 - Active: Enable/Disable your control. Only active controls are allowed to be selected when creating new homepages.
 - Table: Table that you want to query to get values to populate into the control gauge select box.
 - Choice Value: Defaults to Sys ID. This is the choice list value that you want to use for the report queries and in most cases should be a Sys ID since that is the unique value of most ServiceNow Records. You can select reference fields where the value being stored will be the Sys ID of the related record.

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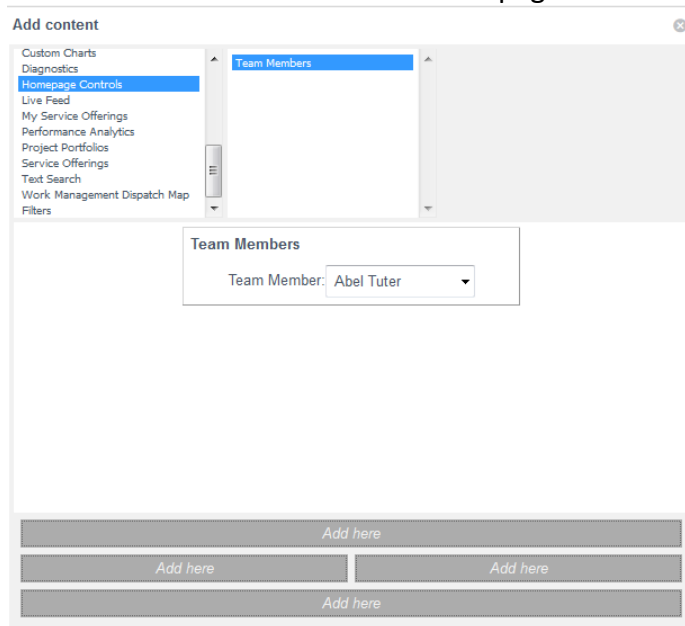
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- Condition: Use conditions to set the query to get the specific records you want to populate in the select box from the table chosen.
 - UI Page: This is automatically created once you create a Homepage Control record. This is the actual gauge record that you will later add to a new homepage. You should never have to update this record.
 - Dynamic Filter: This is automatically created once you create a Homepage Control record. This is a dynamic filter that you will later use when creating reports that work with the control gauge. You shouldn't have to update this record.
 - Long Name: This doesn't show up on the form, but it is being set in the background automatically. It is used to set the name of the related UI page and user properties.
- At the bottom of an existing record you will find a related list called User Preferences.
 - As a user selects a value in the control gauge, a user preference is recorded with the value chosen. This preference is then utilized in the reports that dynamically update as a result to a selection change. The User Preferences related list at the bottom shows you all the users that are currently utilizing the control gauge and what value they have chosen.
- As homepage control records are inserted, updated, and deleted, a business rule executes and manages the associated records:
 - UI Page: The control gauge on the homepage is a UI page.
 - Dynamic Filter: More on dynamic filters below, but this simplifies the creation of reports utilizing the homepage control.
 - User Preferences: These records will be deleted if the control gauge is deleted
 - Note: Updates to the homepage control records cause the automatically created UI Page and Dynamic Filter to be deleted and recreated. This is by design so you may need to re-associate existing reports to the proper dynamic filter.
 - Deleting a homepage control record will delete the related UI Page, Dynamic Filter and User preferences automatically.
- Once the homepage control record has been created, your users can then add the control gauge to a new homepage and create reports to utilize the control gauge selection.

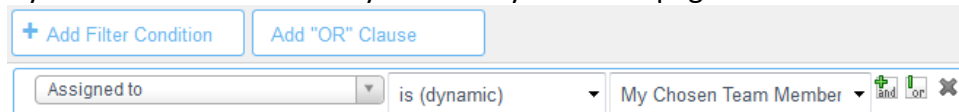
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- The homepage controls show up as a new item in the Add content popup. In the far left list, scroll down and select Homepage Controls. In the middle list you will find all the homepage controls that you have created. This list only shows the records that are active. From here you can choose where to add it to a homepage.



- Reports will need to be created to utilize the selected value and then added to the homepage. When creating reports, you can utilize the Dynamic Filter automatically created by the homepage control record.



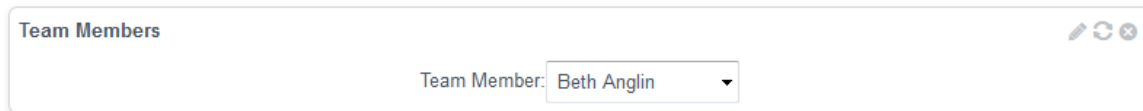
- In the Dublin release, ServiceNow introduced Dynamic Filter Options:
http://wiki.servicenow.com/index.php?title=Using_Filters_and_Breadcrumbs#Dynamic_Filter_Options
- This is a more user friendly approach and replaces the need to insert code such as “javascript:getMyGroups()” into condition fields. You will find many other examples included in ServiceNow so I encourage you to leverage this feature in ad hoc queries and reports.

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Provided Example: My Team Homepage

Provided in the update set is an example homepage control record called Team Members. This is the control gauge utilized in the screenshot above. If you open this record you will find how it is setup. Explanation below:



- This homepage control gauge was created automatically by the homepage control record.
 - This is a list of the current logged in user's groups and subgroups team members.
- How this is setup:
 - Table: Group Member [sys_user_grmember]
 - Group Membership in ServiceNow is stored in a table called Group Member (sys_user_grmember). This is the table that is needed to populate the control gauge.
 - Choice Value: User
 - When displaying the list of users in the gauge, we want to show the User who is a member of the group. Because the sys_user_grmember is a many to many table that links users to groups, the Choice value should be set to User and not the default Sys ID. If we had left it at Sys ID, you would have gotten a list of sys_user_grmember records, not the individual group members.
 - The choice value will typically be set to Sys ID most of the time, but in cases where we want to dot walk to a related record and show a list of those values, you can set the choice value to a reference field.
 - Condition: Group is (dynamic) My Groups Extended
 - In order to know what members to present in the list, we need to know what groups the current logged in user is a member of.
 - Out of the box, ServiceNow includes a dynamic filter for groups called "One of my Groups" that could be used for this control gauge – behind the scenes this is the same as javascript:getMyGroups(). One of the issues with this function is that it only gets a list of groups that the user is a direct member of. In the case of a senior manager who is a manager of many groups and subgroups, the "One of my Groups" wouldn't get the

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entire list. ServiceNow Guru has an article on how to address this with a new script include function called getMyGroupsAdvanced:

<http://www.servicenowguru.com/scripting/script-includes-scripting/advanced-getmygroups-function/>

- This update set includes this code as a Script Include as well as a new Dynamic Filter Option called “My Groups Extended” that utilizes this new function. This example control gauge utilizes this new dynamic filter.
 - Note: If you previously added this code into your instance you may have duplicate script includes after committing the update set. Please remove the newly created duplicate.
- Once this example homepage control record was created, business rules automatically created a UI Page and a Dynamic Filter to use with this homepage control. You can view these records on the Related Records tab. You should never edit those records since they are maintained automatically.

Example on how to create a new Interactive Homepage

On top of providing an example, it may be useful to walk through the steps necessary for creating a new interactive homepage. In this example, we will create a control gauge with a list of Customers (company record) because we want to have an interactive dashboard where we can see incidents for different customers.

- Navigate to Homepage Admin\Homepage Controls
- Click New at the top of the list



* Name Reports by Customer




* Gauge Choice Label Customer Active ☒

Select From Related Records

Select From

* Table Company [core_company] Choice Value Sys ID

Condition  

Customer is true   

Submit

- Fill out the form with the following information:
 - Name: Reports by Customers
 - Gauge Choice Label: Customer
 - Table: Company [core_company]

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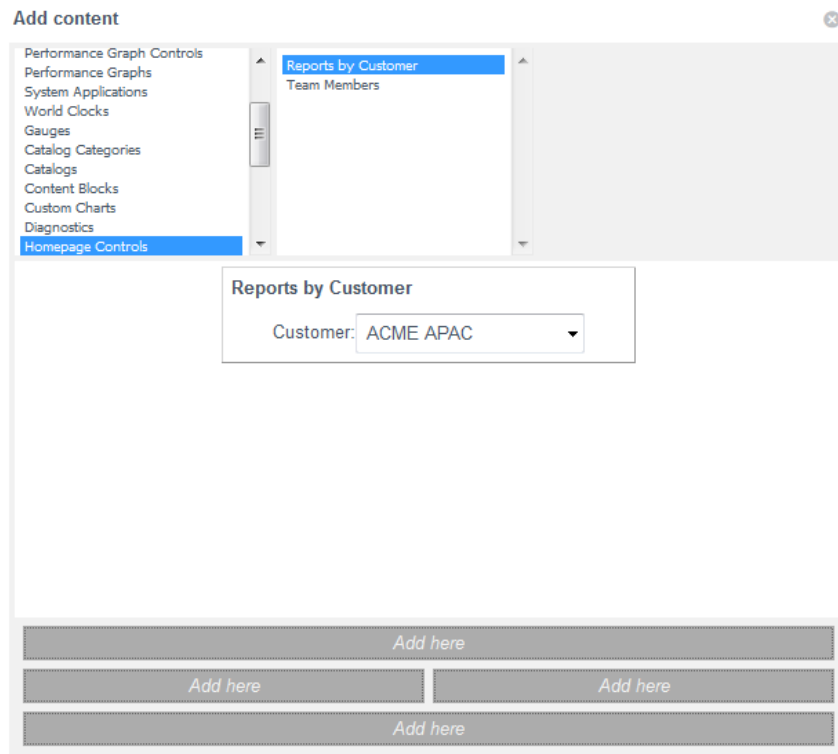
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- Choice Value: Leave default of Sys ID
 - Condition: Customer is true
- Click Submit. As the record is submitted, a UI Page and Dynamic Filter are automatically added that we will leverage on a new homepage.
- Now go back to your homepage by clicking your logo in the upper left hand side or Homepage Admin\My Home.
- Create a new homepage to utilize your new homepage control.
 - Now that everything is in place behind the scenes, you will now need to create a new homepage. I will not walk through that entire process but details on how to create new homepages is documented on the Wiki so the following articles may be useful:
 - Creating New Homepages:
http://wiki.servicenow.com/index.php?title=Creating_New_Homepages
 - Customizing Homepages:
http://wiki.servicenow.com/index.php?title=Customizing_Homepages
 - Adding Existing Gauges to a Homepage:
http://wiki.servicenow.com/index.php?title=Adding_Existing_Gauges_to_a_Homepage

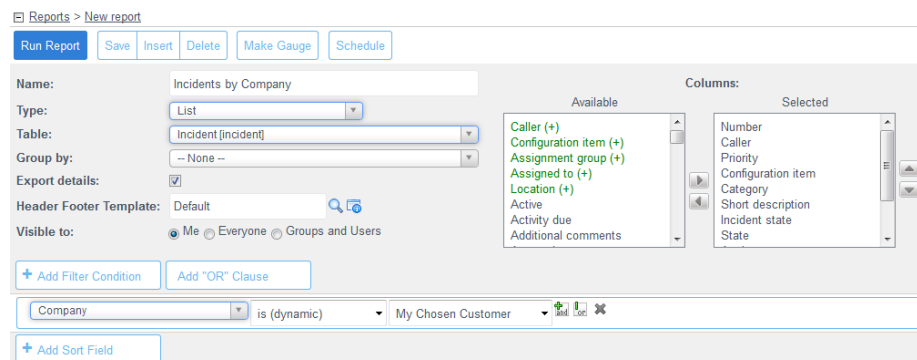
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- Once new homepage is created, click the Add Content + on the top left hand side of the homepage so we can add the new control gauge.
 - In the left column scroll down and select Homepage Controls, then in the middle list, choose Reports by Customer. Then select where you want to add it to your homepage.



- Once it is added to your new homepage, you should have a select box with all companies of type customer.
- Create a new report to leverage your Customer selection.
 - Navigate to Reports\Create New and then fill in the report like the screenshot below:



- Notice that I set a filter condition to Company is (dynamic) My Chosen Customer. This dynamic filter was automatically added by

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the homepage control record. This dynamic filter will look up the user's user preference of what company he/she selected and filter the list of incidents based on that chosen customer.

- Click Save.
- Click the Add to Homepage and choose where you want it added.
- This should take you back to your new homepage. From here you can select different Customers and the report should update based on your selection.

Reports by Customer											
Customer: ACME South America											
Incidents by Company											
Number	Caller	Priority	Configuration item	Category	Short description	Incident state	State	Assignment group	Assigned to	Location	
INC0006936	Tia Neumaier	3 - Moderate	Google App Engine	Inquiry / Help	Google App Engine is becoming sentient.	Awaiting Problem	Awaiting Problem	Service Desk	Spencer Worker	Carretera Cancun-Chetumal KM.22, Cancun	
INC0005627	Theron Hambright	5 - Planning	IBM Cloud Computing	Inquiry / Help	IBM Cloud Computing backup is not saving all files.	Awaiting Vendor	Awaiting Vendor	Service Desk	Spencer Worker	SHS quadra s. Bloco E., Brasilia	
										<< < 1 to 2 of 2 > >>	

- From here you can continue adding new reports to meet your needs and then grant access to this new dashboard to the appropriate roles.

[http://wiki.servicenow.com/index.php?title=Homepage_Administration#Securing a Homepage](http://wiki.servicenow.com/index.php?title=Homepage_Administration#Securing_a_Homepage)