Service Portfolio Management

Selling Business Services in ServiceNow

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Introduction

Service Portfolio Management Plugin

Note: *This article applies to Fuji and earlier releases. For more current information, see Service Portfolio Management* [1] *at* http://docs.servicenow.com **The ServiceNow Wiki is no longer being updated. Visit** http://docs.servicenow.com **for the latest product documentation.**'

Overview

Service Portfolio Management addresses three core business needs:

- The plugin can be used to document the various business services offered using a standardized, structured format. This list of offerings can be offered to the user base in a consumer-friendly catalog.
- Once services are defined, the system will start automatically tracking performance against defined availability commitments. If outages are reported, the platform handles availability tracking.
- Once service offerings are documented and performance is being tracked, the information can be relayed in realtime performance gauges available to end users. These gauges can be displayed on customized homepages, or users can view their **My Subscriptions** home page and see the status of any service offerings to which they are subscribed.

For more information, see **Service Offerings**.

Installed with the Plugin

Components

The following new components are installed with the Service Portfolio Management Plugin:

Component	Name	Description
Business Rule	Recalculate Availability	Performs availability calculations when an outage is created or modified.
Script Include	AvailabilitySummarizer	Summarizes daily availability for Service Offerings that have availability commitments.
Scheduled Job	Calculate Availability	Runs every night to calculate the availability of Service Offerings that have availability commitments.
Module	Business Service Entries	Located in the *Service Catalog* application, this module enables an administrator to define which Business Services appear in the Business Service Catalog that end users see.
Homepage gauge	My Service Subscriptions	This gauge displays all service offerings to which the user is subscribed.

Tables

Table	Description
Service Offering [*service_offering*]	Extends the *cmdb_ci_service* table. The **Subscribes to Service** Related List that is available in the User form uses this table.
Service Commitments [*service_offering_commitment*]	Stores records from the **Service Commitments** Related List in the Service Offerings form.
Service Scope [*service_scope*]	Stores user-defined limits to the service levels of a Business Service.

Setting up Service Portfolio Management

Follow these steps to set up and use Service Portfolio Management.

Step 1: Define the Service Offerings and Commitments

Create Service Offering records that define different levels of service for an existing Business Service. For example, you might offer two levels of *Desktop Support* in your organization, a Standard offering for upgrades and virus protection, and an Executive offering that also includes some type of availability guarantee. Create a complete set of **Service Offerings**, defined by **Service Commitments** which define the specifics of the offering.

Step 2: Define the Scope of the Service Offerings

Scope in Service Portfolio Management refers to the detailed service parameters that define the limits of a Business Service. Specific additional services related to the Business Service can be defined as *In Scope* or *Out of Scope*. For instructions on creating and applying scope definitions to Business Services, see **Business Service Scope**.

Step 3: Configure the Price of the Service Offering

Each Service Offering must have a pricing model and a price unit. These values are set on the parent Business Service and are inherited by the offerings, which then must establish the actual price per unit that is charged for the service. For details, see **Service Pricing**.

Step 4: Configure the Business Service Catalog for the End User

All the data created in the previous steps is displayed on the Service Catalog page for a Business Service. The layout of this page is not configurable, but an administrator can control how the Business Service is categorized and who can view the Business Service in the Catalog. For details see **Business Services Catalog**.

Step 5: Subscribe to the Service Offering by Users

Subscribe your users to a Service Offering. Subscribed users can then add availability data as **gauges** to their home page for each Service Subscription they have. Each gauge contains links that enable the user to open the Service Offering record, display an availability report, or create an outage. See **Service Subscriptions** for information on subscribing to Service Offerings.

References

[1] https://docs.servicenow.com/bundle/jakarta-it-service-management/page/product/service-portfolio-management/concept/c_ServicePortfolioManagement.html

Setup

Service Offerings

Note: *This article applies to Fuji and earlier releases. For more current information, see Add Service Offerings* [1] *at* http://docs.servicenow.com **The ServiceNow Wiki is no longer being updated. Visit** http://docs.servicenow.com **for the latest product documentation.**'

Overview

Service Offerings are used to create refined levels of service for existing Business Services. A Service Offering derives from a Business Service, customizing the parent business service to a specific business need. A Service Offering consists of a set of *Service Commitments* which define the service offering's level of service in terms of availability, scope and pricing. Service Offerings are the starting point for configuring Service Portfolio Management.

For example, an organization may offer two levels of *Desktop Support* in your organization: a Standard offering of upgrades and virus protection and an Executive offering with the standard commitments plus some type of availability guarantee, such as 98% availability from 8-5 on weekdays.

Creating a Service Offering

1. Navigate to **Business Services > Service Offerings** and click **New**.
2. Give the offering a unique and descriptive name.
3. Make sure to include the **Parent** service from the list of available Business Services.
4. Set the **Price** and select a currency.

   The **Price model** and the **Price unit** fields are read-only. These values can only be set in the Service Portfolio view of the parent Business Service.
5. In versions at Dublin and later, select a **Vendor** and a **Contract** for this service offering.

   This information is used when creating vendor credit records.
6. Complete the form, right-click in the header bar and select **Save** from the pop-up menu.

   The related lists for the offering appear.
7. Configure **Service Commitments** and Subscribe by User using the procedures in this page.

Note: *Modifying the line items (such as* ***Location***, ***Manager***, ***Tech Contact***, *and* ***Billed Monthly****) that appear in each service offering requires knowledge of scripting and Jelly. The service offering line items can be modified by navigating to* ***System UI > UI Macros*** *and selecting the UI macro named servicecatalog_delivery. For more information, see UI Macros.*

Service Commitments

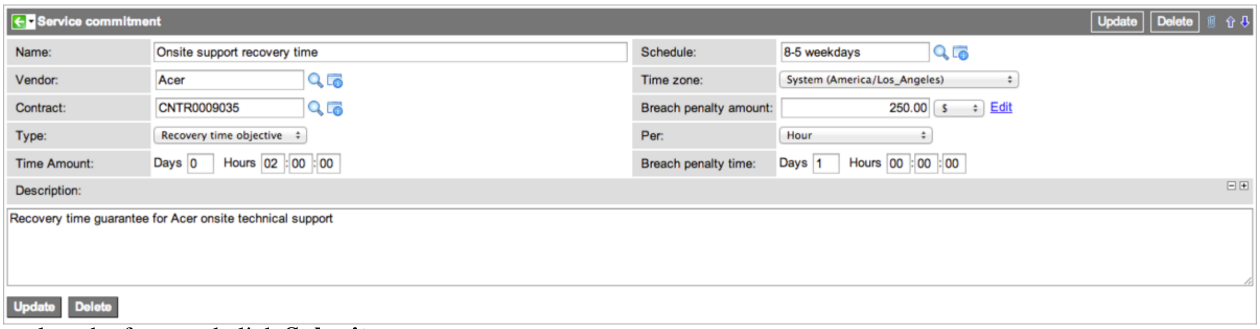
Service Commitments are specific services or availability guarantees that define the offering and make it unique.

1. Navigate to **Business Services > Service Offerings**.
2. Open a Service Offering record.
3. In the **Service Commitments** related list, click **New**.
4. Give the commitment a descriptive name.

   You can specify any kind of service.
5. Select the **Type** of commitment from the list.
   - **Availability** and **Maintenance Window:** Used in system processing. If you select **Maintenance Window**, the **Schedule** field is required.
   - **Response Time**, **Delivery** and **Other:** Display additional information in the Business Service Catalog. This information details the type of Service Commitment the user may expect from a given Service Offering. These Service Commitment types do not provide additional functionality or a homepage gauge.
   - **Recovery time objective:** Guarantee of how long it will take to recover the system from the recovery point. Set the recovery time in the **Time Amount** field that appears when you select this commitment type. This field is available with vendor ticketing beginning with the Dublin release.
   - **Recovery point objective:** Guarantee of how often backups are performed. Set the backup interval in the **Time amount** field that appears when you select this commitment type. This field is available with vendor ticketing beginning with the Dublin release.
   - **SLA:** Allows commitments to be defined by a Service Level Agreement (SLA) that tracks whether a vendor provides a level of service for a defined percentage of the time. The SLA results are calculated automatically and can be viewed on the **My Services - SLAs** homepage or in the Service Offering SLA Results table (**Business Services > Service Offering SLAs > SLA Results**). To learn more, see Defining Commitments on a Service Offering with an SLA. This type requires the Service Portfolio Management - SLA Commitments plugin.
6. Select a **Vendor** and a **Contract** for this service commitment.

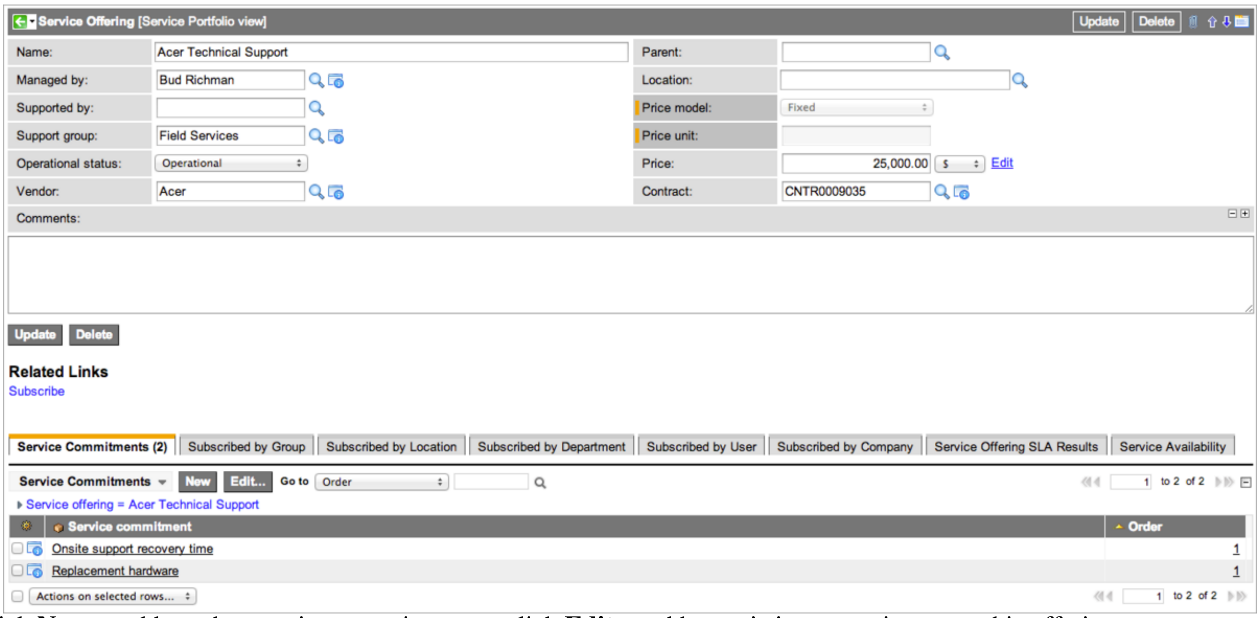
   This information is used in when creating vendor credit records.
7. Enter the information needed to calculate credit owed by this vendor for any contract breaches.

   These fields are available with vendor ticketing beginning with the Dublin release.
   - **Breach penalty amount:** Amount assessed per unit of time for a breach.
   - **Per:** Unit of time used to calculate the total credit owed for a breach.
   - **Breach penalty time:** Amount of free time provided by the vendor per breach.


Service commitment
Update Delete
Name: Onsite support recovery time
Schedule: 8-5 weekdays
Vendor: Acer
Time zone: System (America/Los_Angeles)
Contract: CNTR0009035
Breach penalty amount: 250.00 $ Edit
Type: Recovery time objective
Per: Hour
Time Amount: Days 0 Hours 02 : 00 : 00
Breach penalty time: Days 1 Hours 00 : 00 : 00
Description:
Recovery time guarantee for Acer onsite technical support
Update Delete

8. Complete the form and click **Submit**.

   You are returned to the Service Offering form, and the new commitment appears in the **Service Commitment** Related List.



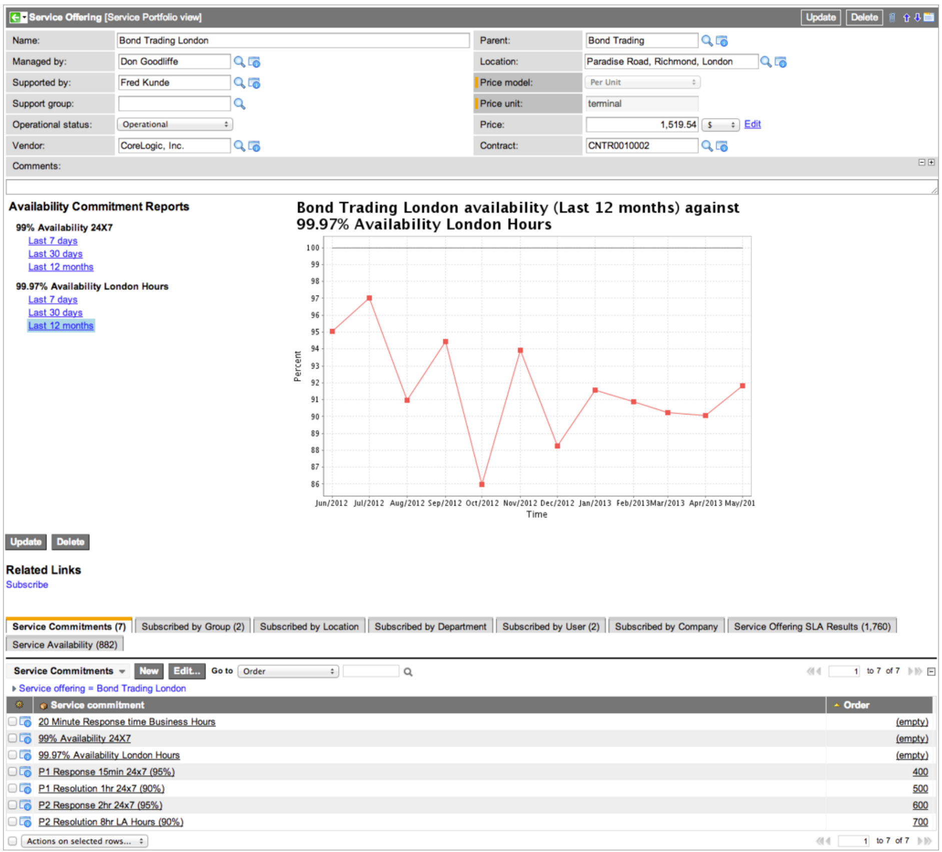
9. Click **New** to add another service commitment or click **Edit** to add an existing commitment to this offering.

   To view all the commitments in the system, navigate to *Business Services* > *Commitments*. You can add, edit, or delete commitments in this module.

Availability Report

When a service commitment contains an availability guarantee, the service offering form displays an Availability Commitment Report that is generated on the fly. This report tracks the actual availability of the offering. For a 7 day chart, no reporting data is available until 5 days after the service offering is created. For 30 day charts, 23 days of data is required before a report can be generated, and for a 12 month chart, the database must contain at least 10 months of data.

Click the links under the different availability commitments to see the charts for those time periods. The completed Service Offering form with an active availability report looks like this:

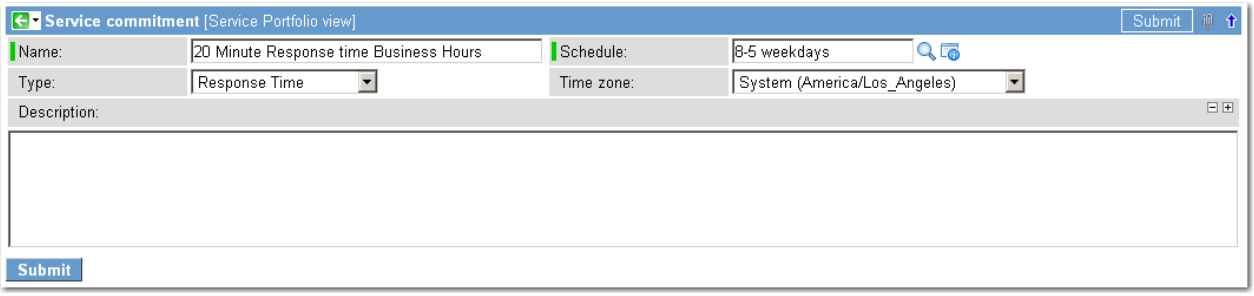


Service Commitments for versions prior to Dublin

Service Commitments are specific services or availability guarantees that define the offering and make it unique.

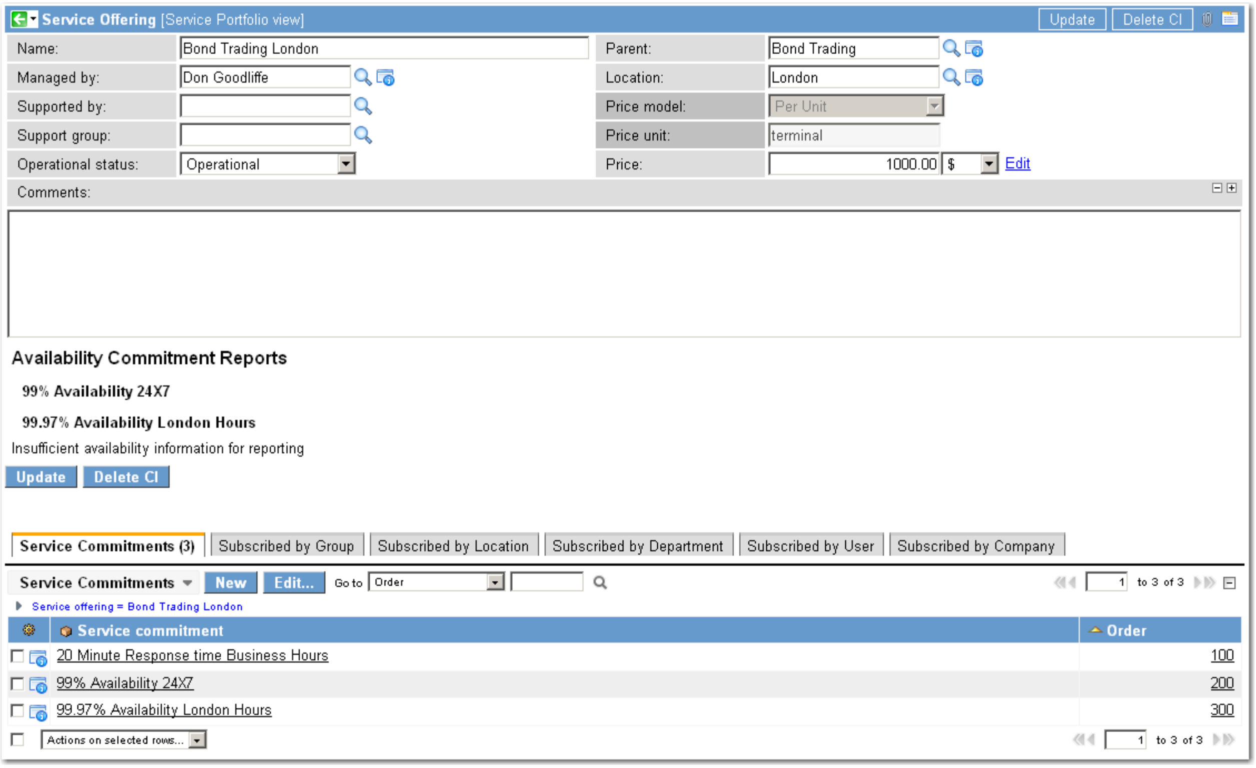
1. Navigate to **Business Services > Service Offerings**.
2. Open a Service Offering record.
3. In the **Service Commitments** related list, click **New**.
4. Give the commitment a descriptive name.

   You can specify any kind of service.
5. Select the **Type** of commitment from the list.
   - **Availability** and **Maintenance Window** are used in system processing. If you select **Maintenance Window**, the **Schedule** field is required.
   - **Response Time**, **Delivery** and **Other** display additional information in the Business Service Catalog. This information details the type of Service Commitment the user may expect from a given Service Offering. These Service Commitment types do not provide additional functionality or a homepage gauge.
   - The **SLA** commitment type (requires Service Portfolio Management - SLA Commitments plugin) allows commitments to be defined by a Service Level Agreement (SLA) that tracks whether staff provide a level of service in a defined amount of time. The SLA results are calculated automatically and can be viewed on the **My Services - SLAs** homepage or in the Service Offering SLA Results table (**Business Services > Service Offering SLAs > SLA Results**). To learn more, see Defining Commitments on a Service Offering with an SLA.



6. Complete the form and click **Submit**.

   You are returned to the Service Offering form, and the new commitment appears in the **Service Commitment** Related List.

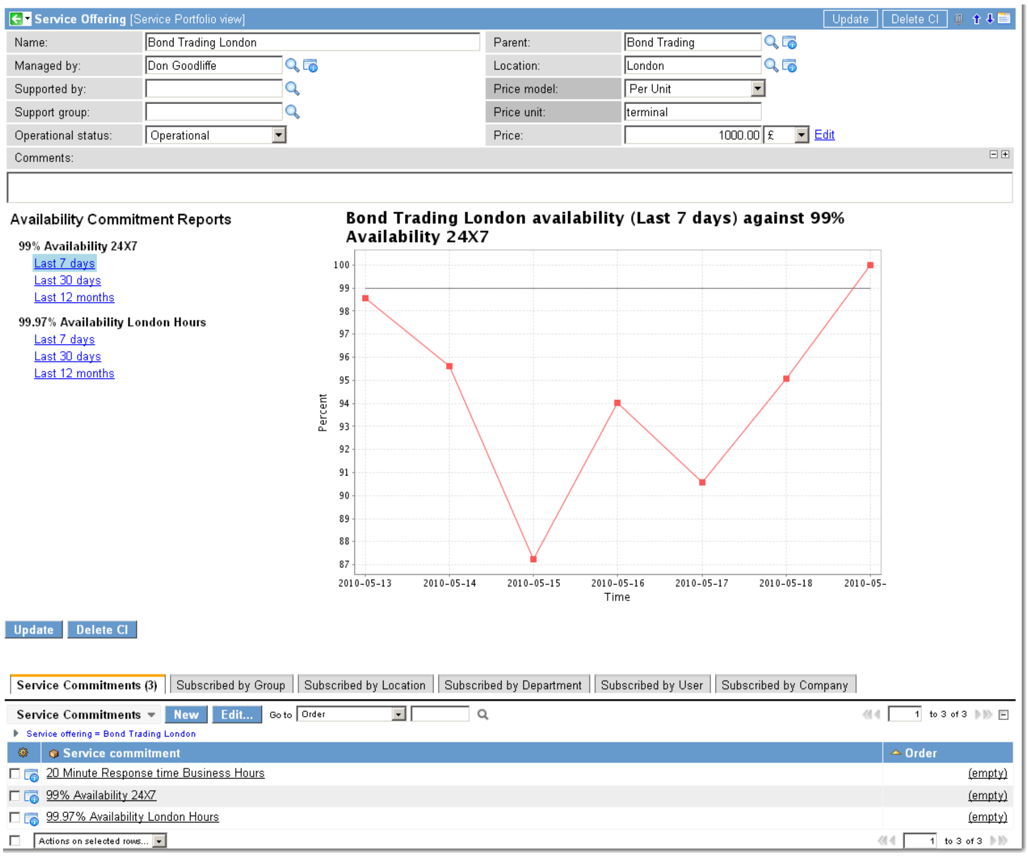


   When a service commitment contains an availability guarantee, the service offering form displays an Availability Commitment Report that is generated on the fly. This report tracks the actual availability of the offering. For a 7 day chart, no reporting data is available until 5 days after the Service Offering is created. For 30 day charts, 23 days of data is required before a report can be generated, and for a 12 month chart, the database must contain at least 10 months of data.

7. Click **New** to add another service commitment or click **Edit** to add an existing commitment to this offering.
8. To view all the commitments in the system, navigate to **Business Services > Commitments**.

   You can add, edit, or delete commitments in this module.

Click the links under the different availability commitments to see the charts for those time periods. The completed Service Offering form with an active availability report looks like this:



Subscribe by User

A service offering *subscription* for a user enables that user to add subscribed availability data as gauges to the home page. These *Service Subscriptions* display the actual availability of an offering and indicate any outages, planned or otherwise. Links on the gauges allow the user to open a service offering record, open an outage record, or view an availability report. To add users to the subscribers list, click **Edit** in the **Subscribed by user** related list. For more information about creating and using these gauges, see Service Subscriptions.

Outages

Service Commitments for availability can be adjusted with Commitments for Maintenance to accommodate planned outages. Service Portfolio Management tracks and reports on outages for all Service Offerings that include availability commitments. Outages are recorded manually and tracked in reports in Service Offering records and in the Service Subscription gauges added to users' home pages. There are three types of outages:

- **Outage**: Unplanned outages such as those caused by hardware or network issues. This is the only type of Outage considered when calculating availability of a service.
- **Planned outage**: Necessary outages caused by planned maintenance or upgrades.
- **Degradation**: Indicates a problem affecting a service that does not result in a disruption of that service.

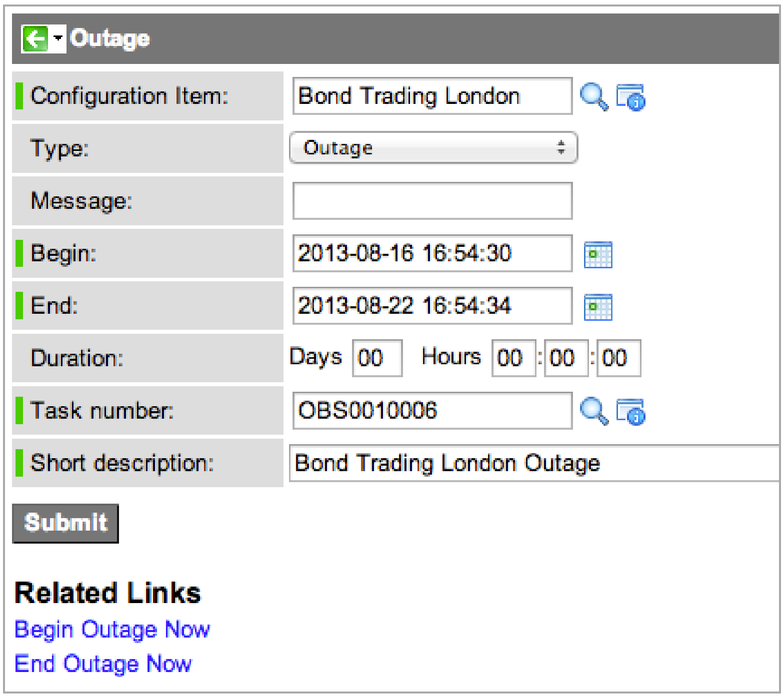
To create an outage record:

1. Open a blank outage record using one of the following methods:
   - Navigate to **Business Services > Outages**.
   - Right-click in the header bar of a Service Subscription gauge in a home page with a status of **Available** and select **Create Outage record** from the pop-up menu.
2. In the Outage record, select the service offering from the list in the **Configuration item** field.

3. Select an outage **Type**.
4. Enter the text in the **Message** field that appears in the Service Offering gauge.
5. When added to the Homepage, this gauge is called **My Services**.
6. Define the length of the outage.
7. Select the **Begin** and **End** dates and times with the calendar, or enter the **Duration** as a function of days and hours.
8. Add a description of the outage in the **Short Description** field or leave it blank.

   If you leave this field blank, the system adds a description automatically when you save the outage record, using the format ***<configuration item name>* Outage**. If vendor ticketing is activated, the system uses the short description to identify this outage in the **Related outage** field of the Vendor Credit form.
9. Click **Submit**.

   The outage is used to evaluate the availability of the offering and appears in the reports generated for this offering.



References

[1] https://docs.servicenow.com/bundle/jakarta-it-service-management/page/product/service-portfolio-management/task/t_ServiceOfferings.html

Business Service Scope

Functionality described here requires the **Service Portfolio Management** plugin.

Note: *This article applies to Fuji. For more current information, see Business Service Scope* [1] *at* http://docs.servicenow.com The Wiki page is no longer being updated. Please refer to http://docs.servicenow.com for the latest product documentation.

Overview

Scope is an arbitrary detail that is used to define the limits of a Business Service. Scope items can be of any type or granularity and are used to define what the Business Service can provide (*In Scope*) and what it cannot provide (*Out of Scope*). Scope allows an administrator to grant or deny specific services that define a more detailed view of a Business Service. For example, *Nightly Backups* might be In Scope for the Desktop Support Business Service, but *Disaster Recovery* is Out of Scope.

The *In Scope* and *Out of Scope* definitions appear in the Business Service Catalog page that end users see when they access the Service Catalog.

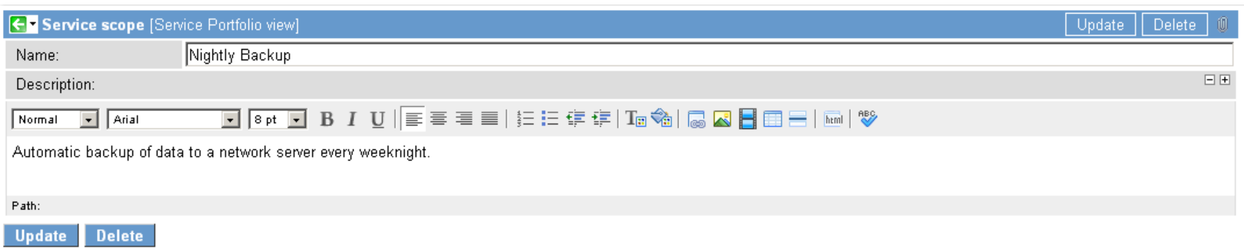
Applying Scope to a Business Service

To view the entire list of scope entries in your system, add **service_scope_list.do** to the end of your instance address and press **Enter**.

1. Navigate to *Business Services* > *Business Services*.
2. Select a Business Service for which you want to define scope.

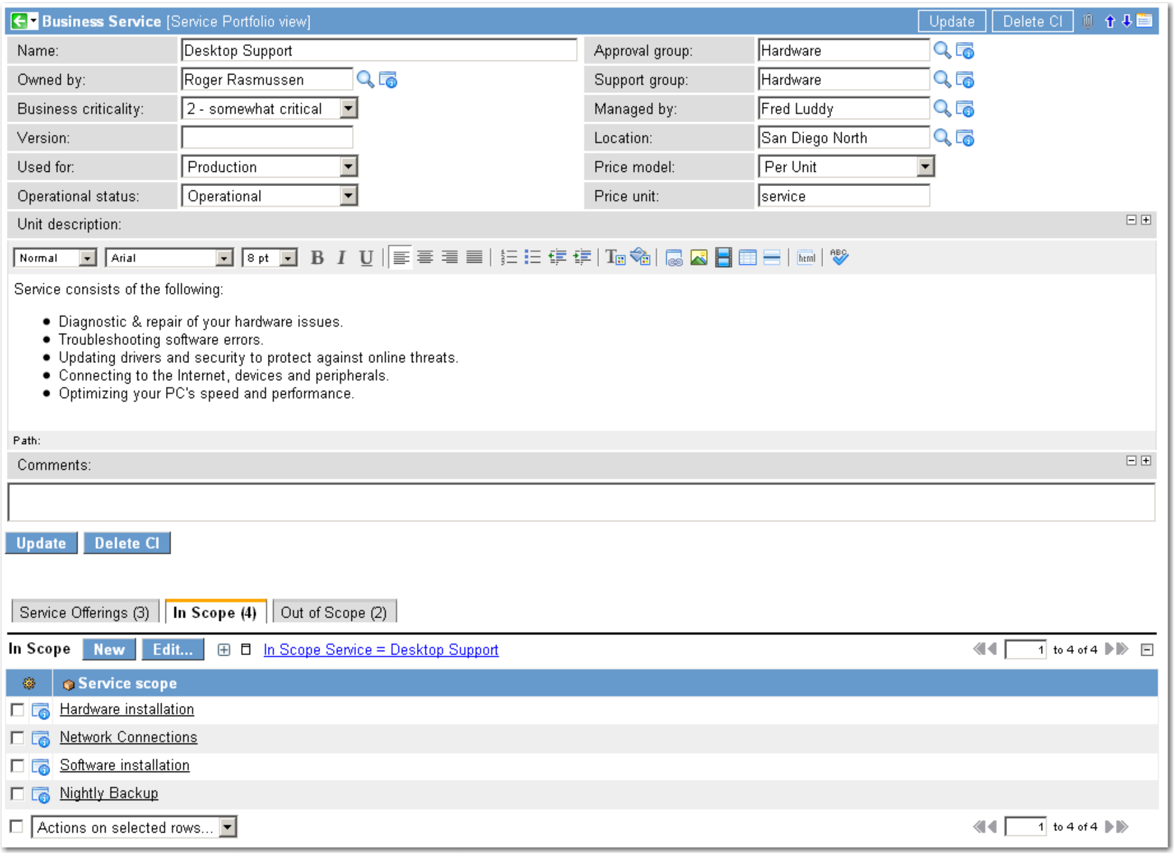
   Only a *parent* Business Services can have scope.
3. Click **New** in either list to create a new *In Scope* or *Out of Scope* definition or click **Edit** to add an existing scope definition.

   These can be anything that is pertinent to the Business Service and helps define the limits of the service that is being offered.
4. Give the scope item a descriptive name and a definition.



5. Click **Submit**.

   The new scope definition appears in the list in which it was created.



6. Create another scope definition or select one from the existing list.

References

[1] https://docs.servicenow.com/bundle/jakarta-it-service-management/page/product/service-portfolio-management/concept/c_BusinessServiceScope.html

Service Pricing

Overview

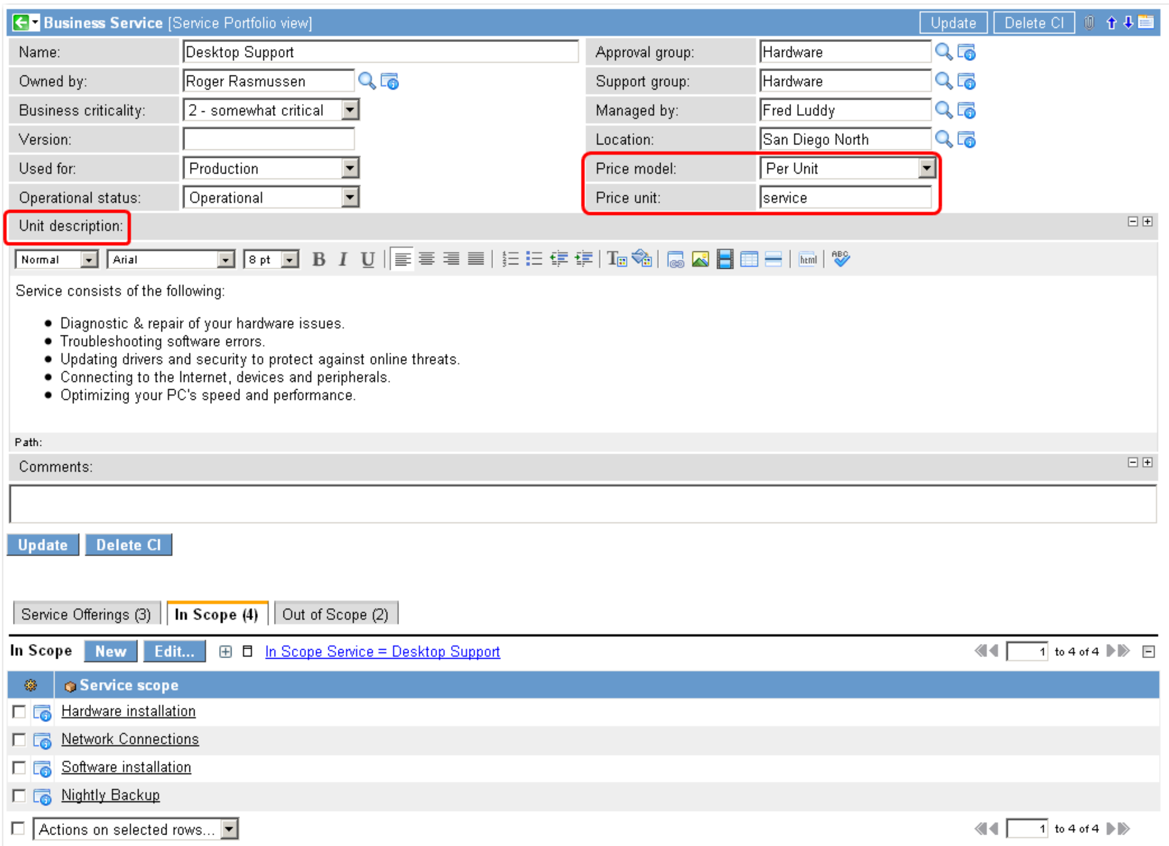
Each Service Offering in Service Portfolio Management must have a price *model* and a price *unit* that is defined on the parent Business Service. The actual price per unit is then set in the **Service Offering** record, which specifies the Service Commitments for the level of service delivered.

Setting Price Models and Units

Set the pricing structure for a Service Offering in the Service Portfolio view of the parent Business Service. The Service Offering inherits the pricing model and unit description from its parent.

1. Navigate to *Business Services* > *Business Services* (the Service Portfolio view), and then select the parent Business Service to a Service Offering you have created.
2. Select a **Price model**.

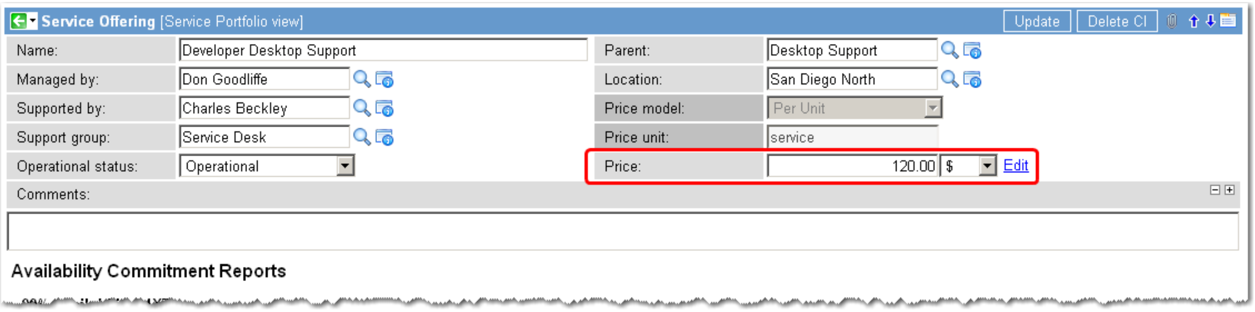
   The choices are **Per Unit** and **Fixed**. If you select **Per Unit**, the **Price unit** field appears.
3. Type the name of a unit to use for pricing, such as **service**, **server**, **person**, etc.
4. (optional) Type a description in the **Unit description** field of the service that is delivered for a price unit.
5. Click **Update**.



Setting the Service Offering Price

Note: *Every Service Offering that has this parent Business Service inherits the pricing structure. The actual price per unit is established in the Service Offering record using this price model and unit.*

Navigate to *Business Services > Service Offerings* and select an offering for which you have defined a pricing structure. Type in the **Price** for each service unit and update the record.



Business Services Catalog

Functionality described here requires the **Service Portfolio Management** plugin.

Note: *This article applies to Fuji. For more current information, see Business Service Catalog* [1] *at* http://docs.servicenow.com
The Wiki page is no longer being updated. Please refer to http://docs.servicenow.com for the latest product documentation.

Overview

A module installed with the Service Portfolio Management Plugin enables an administrator to control what services an end user is allowed to see in the Business Service Catalog and how those services are categorized. The Business Service Catalog retrieves the information it displays from the following records:

- **Business Service Scope**
- **Price model**
- **Service Offerings**
- **Service Commitments**

Business Service Entries

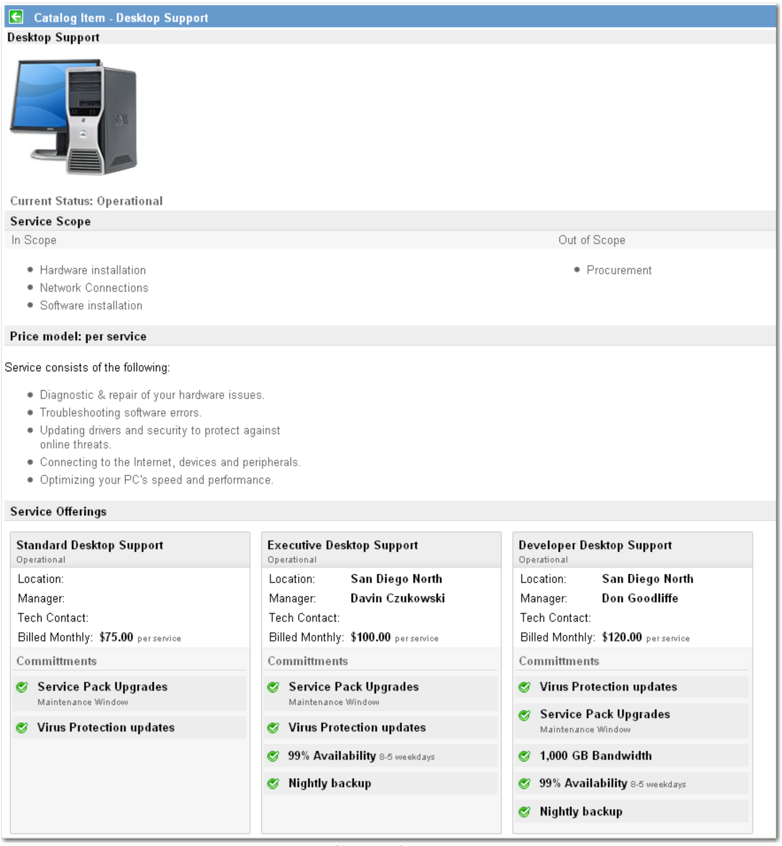
To configure Business Services to appear in the catalog:

1. Navigate to *Service Catalog* > *Catalog Definition* > *Business Service Entries*.
2. Select a Business Service from the list that you want to have appear in the Service Catalog.
3. Make sure the **Active** check box is selected.

   If this check box is not checked, this Business Service will not appear in the Catalog.
4. Select a **Category** under which this Business Service will appear.
5. Click the padlock icon to unlock the **Roles** field and select one or more roles to limit access to this Business Service in the Catalog.

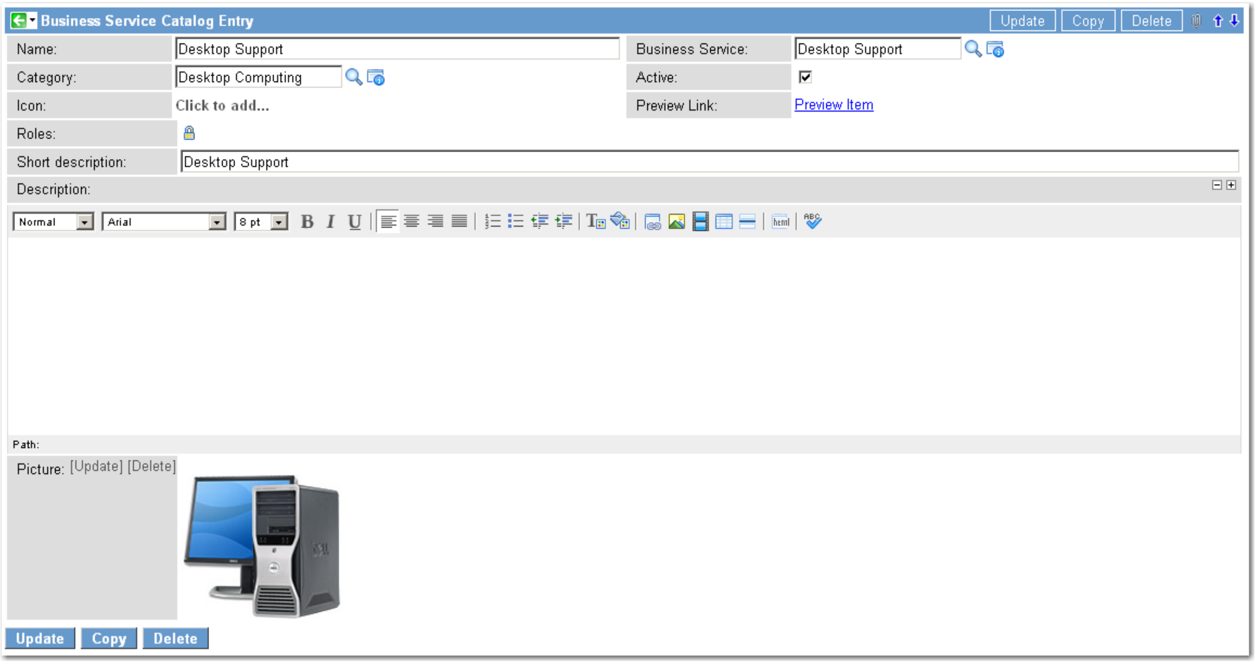
   If no roles are listed, this Business Service is visible to all.
6. Add a description of this Business Service if desired.
7. Attach a graphic that will appear at the top of the Service Catalog page for this Business Service.
8. Click the **Preview Item** link to view the layout of the Service Catalog page.

   The catalog page displays the details of all the functionality you have configured for the Business Service, including the Service Offerings, in a read-only format.



9. Close the preview pane and click **Submit**.

   The completed Business Service Catalog Entry form looks like this:

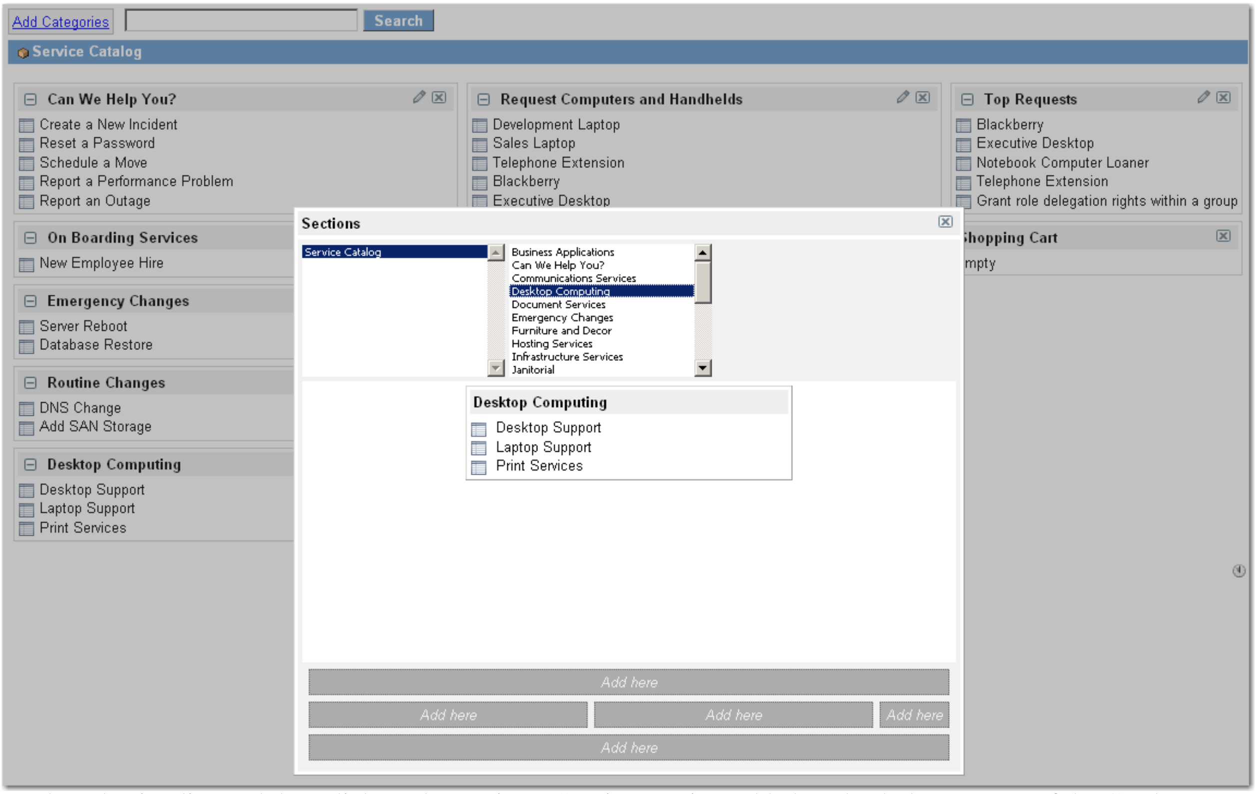


Note: *Modifying the line items (such as* ***Location****,* ***Manager****,* ***Tech Contact****, and* ***Billed Monthly****) that appear in each service offering requires knowledge of scripting and Jelly. The service offering line items can be modified by navigating to* ***System UI > UI Macros*** *and selecting the UI macro named servicecatalog_delivery. For more information, see UI Macros.*

Making the Business Service Visible in the Business Service Catalog

After you configure the Service Catalog entry for your Business Service, configure the Business Service Catalog to display the service.

1. Navigate to *Business Services* > *Business Service Catalog*.
2. If the category in which your Business Service appears is not in the Business Service Catalog, click **Add Category** in the upper left corner.
3. In the list of sections, select the desired category and place it on the page.



4. Close the selection list, and then click on the Business Service you just added to check the contents of the Catalog page.

References

[1] https://docs.servicenow.com/bundle/jakarta-it-service-management/page/product/service-portfolio-management/concept/c_BusinessServiceCatalog.html

Service Subscriptions

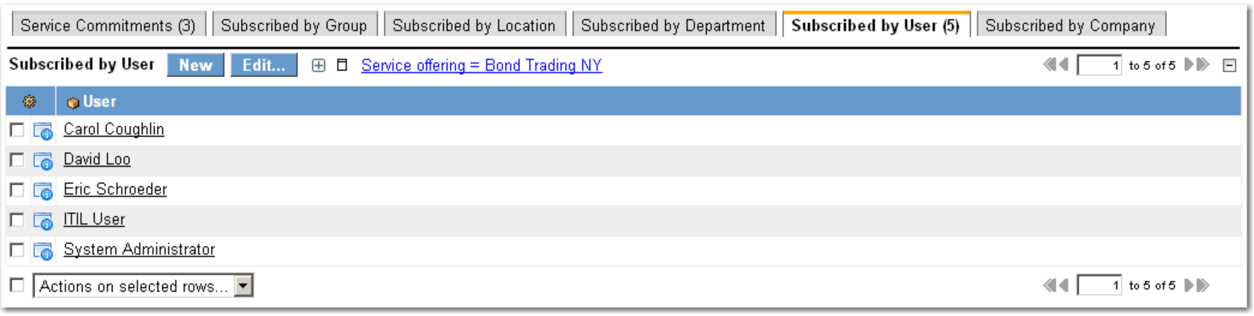
	Functionality described here requires the **Service Portfolio Management** plugin.

Overview

Service Portfolio Management allows administrators to subscribe to **Service Offerings** by user. These users can then add each *Service Subscription* to their ServiceNow home page as **gauges** to display selected availability data. Each gauge has links that enable a user with a subscription to open the Service Offering record, display an availability report, or view an outage record.

Subscribing to a Service Offering

1. In a Service Offering record, click **Edit** in the **Subscribe by User** Related List.
2. In the slushbucket that appears, move the subscribed users to the *Subscribed by User List*.
3. Save your changes.



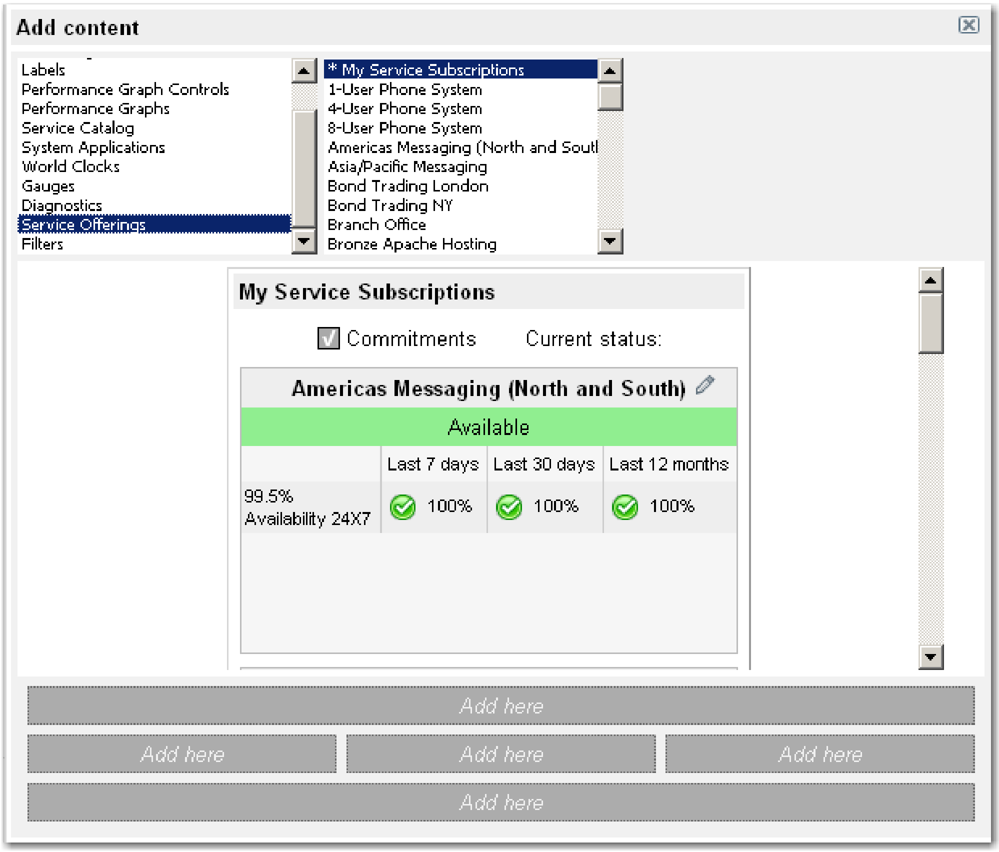
These users can now add a gauge for this Service Offering to their ServiceNow home pages.

Service Subscription Gauges

ServiceNow users can **add gauges** to their home page that display availability data for the Service Offerings to which they are subscribed. These gauges show outage data, availability commitments, and availability performance over the last 7 days, 30 days, and 12 months.

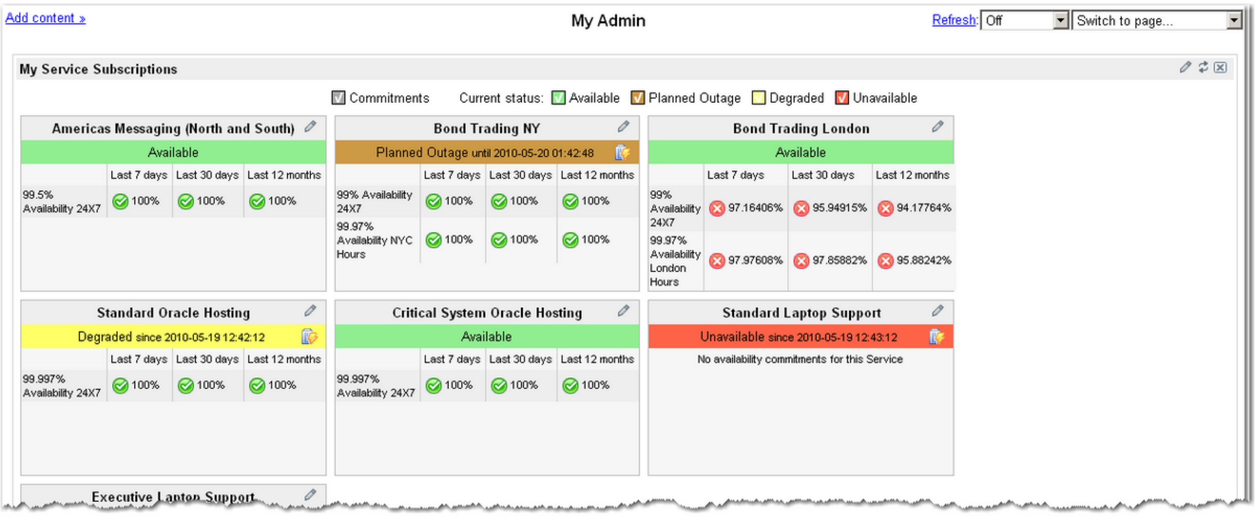
Gauges can be added for individual offerings or for all the offerings to which you are subscribed.

1. Click **Add content** in the upper left corner of the home page.
2. Select **Service Offerings** in the content list on the left to display all the choices.
3. Select individual offerings or select **My Service Subscriptions** to add all the gauges to which you are subscribed.



4. Select the location for the gauges.

   The gauges are color-coded to show their outage status and availability.

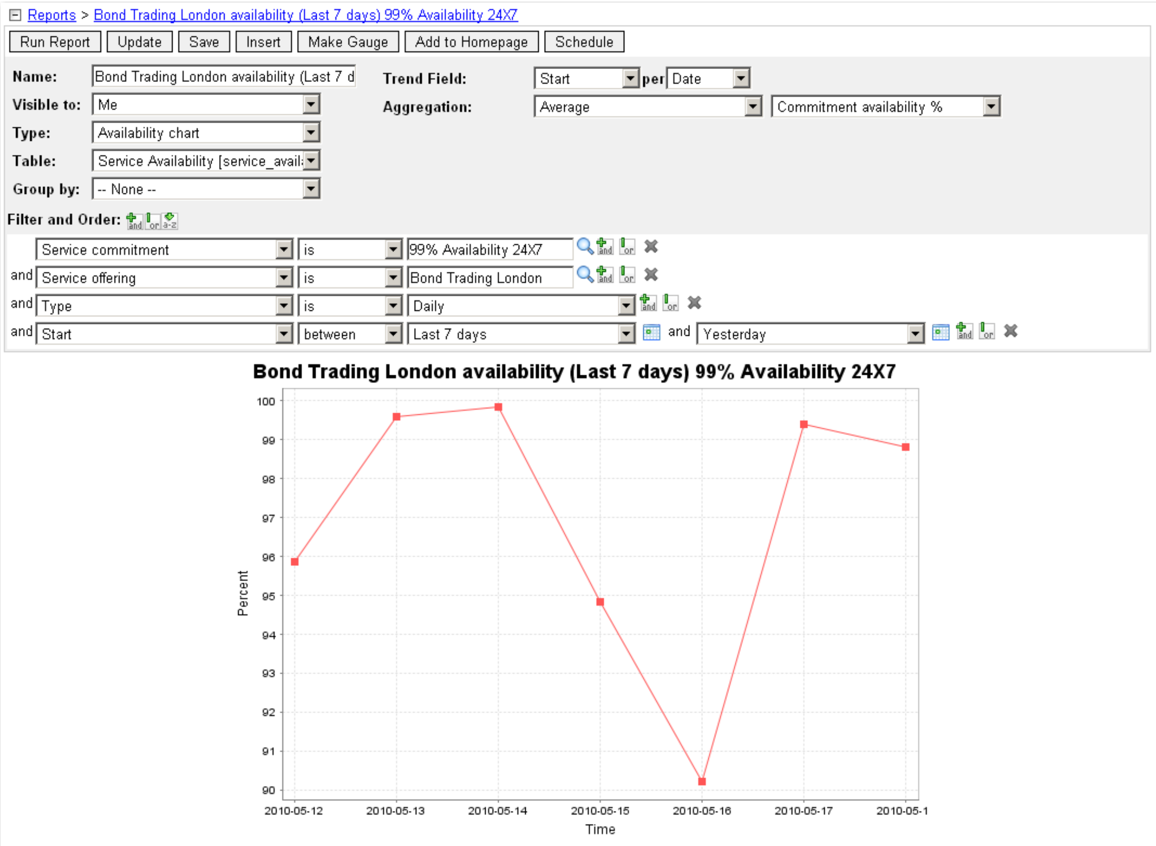


Accessing Records and Reports from Gauges

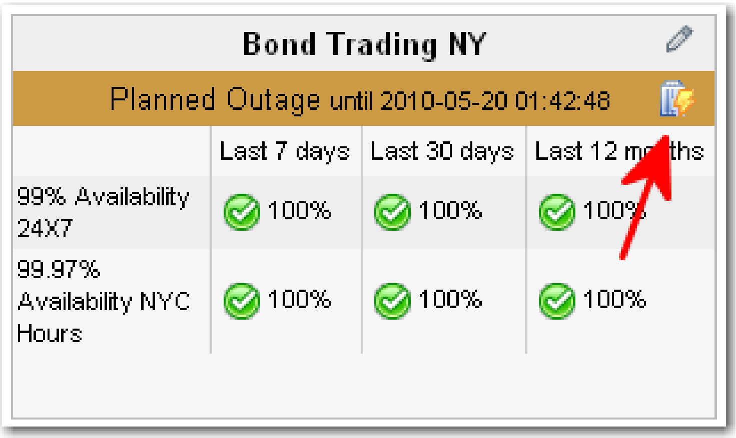
Use the links on the Service Subscription gauges to do the following:

- **Edit the Service Offering**: Click the pencil icon in the upper right corner of each gauge to edit that Service Offering.

- **View selected availability reports**: Click the availability percentage value (actual) to view a report for any of the three evaluation periods.



- **Edit the outage record**: Click the icon in the header bar of a gauge indicating an outage to open the record for that outage.



Related Topics

Service Catalog

Note: *This article applies to Fuji and earlier releases. For more current information, see Service Catalog* [1] *at* http://docs.servicenow.com **The ServiceNow Wiki is no longer being updated. Visit** http://docs.servicenow.com **for the latest product documentation.**'

Overview

The Service Catalog application is a way for customers to order pre-defined, bundled goods and services from your IT organization or other departments. It offers a consistent and intuitive online ordering experience with as much flexibility as you need. The catalog is a structured commodity with its own description, fields, price, and execution schedule.

End users will see all the goods and services they can order (a new laptop, an office desk, business cards), grouped into categories (IT, Facilities, Office and Printing) and subcategories (Computer Hardware, Furniture and Decor, Document Services).

Once an order is placed, the customer can track its progress against the execution plan. **Approvers** will authorize the order if necessary, and **Fulfillment Groups** perform any tasks related to item/service delivery, based on the tickets generated by the order.

This document is a high-level overview of the core concepts of the Service Catalog application. It is meant as background information before diving into the details of the product and its administration.

Service Catalog Concepts

The following terms and concepts are used in the Service Catalog:

Execution Plans

Define how something gets delivered. For example, a PDA might go through procurement / activation / and installation of the desktop software.

Execution Plan Tasks

Plan Tasks represent a step in the Execution Plan, are associated with a Fulfillment Group, and have an approximate duration.

Fulfillment Groups

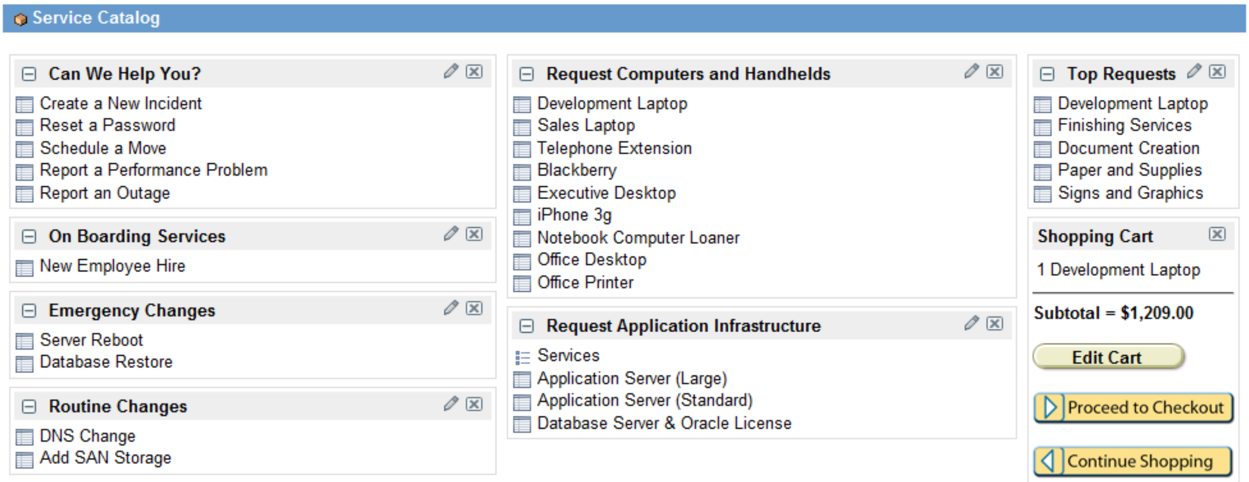
Fulfillment Groups work execution tasks. For example, one group may activate a cell phone while a different group installs the desktop software.

Tickets

Tickets represent work done by Fulfillment Groups as part of an Execution Plan.

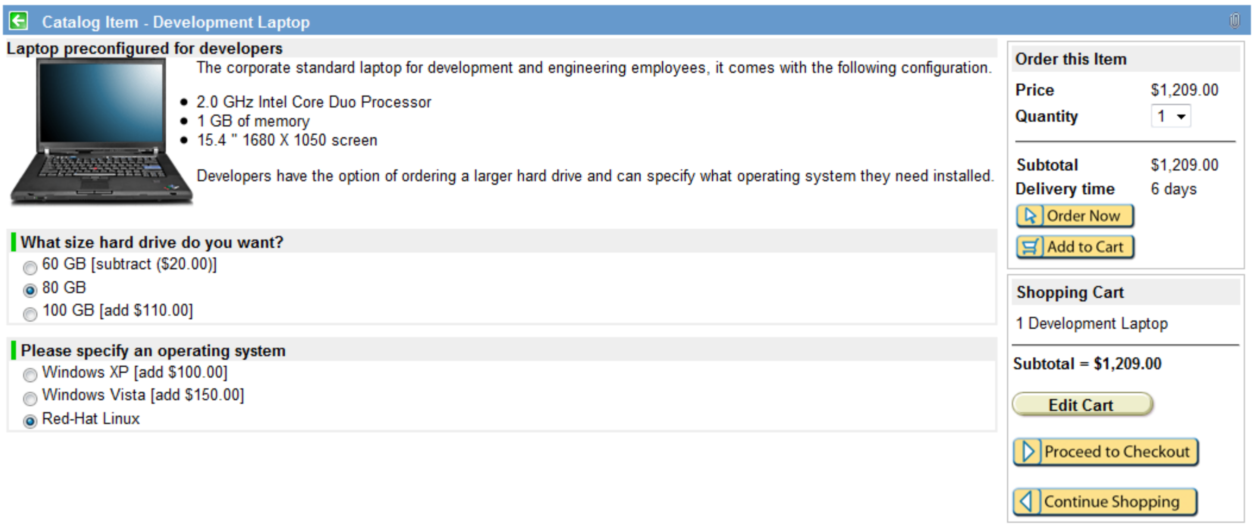
The Catalog

At the heart of the Service Catalog Application is the Service Catalog. The Catalog is a categorical listing of the various goods and services that you provide to your end users.



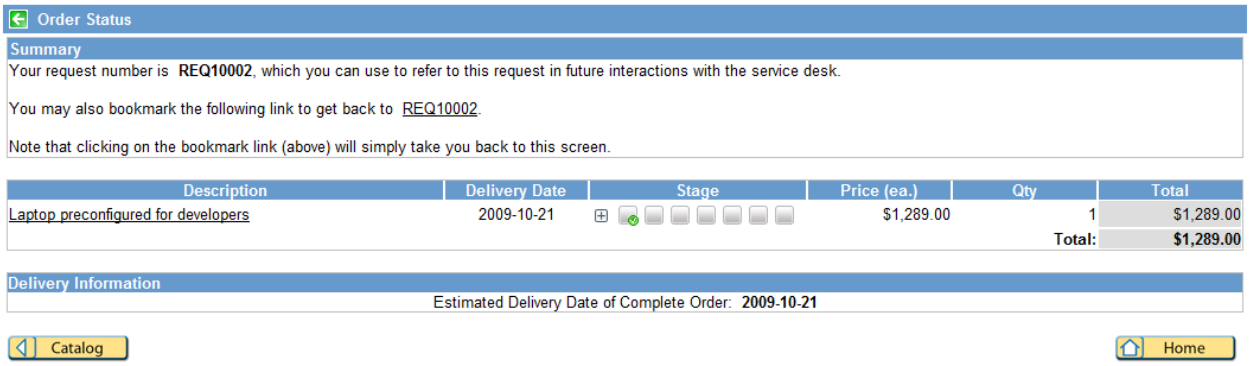
Catalog Items

The overall catalog is made up of a collection of discrete catalog items. A catalog item can be thought of as an atomic good or service. If something can reasonably be ordered by itself, it's a catalog item. If something only really makes sense as part of a greater whole, it's part of an item, rather than an item in and of itself. For example a new Dell server is a catalog item, as is a new Executive Desk.



Request

When a customer actually orders something from the catalog, a request is generated to keep track of this particular order.



If a service catalog request is canceled, all associated purchase orders and transfer orders that have not been received are canceled.

Requested Items

Each individual catalog item that is part of a request creates a discrete request item with the request. For example, a request for 2 PCs, 1 Chair, and 1 Desk would produce:

Request REQ0000001 -- 4 Things

Requested item RITM0000001 -- 2 X PC

Requested item RITM0000002 -- 1 X Chair

Requested item RITM0000003 -- 1 X Desk

References

[1] https://docs.servicenow.com/bundle/jakarta-it-service-management/page/product/service-catalog-management/concept/c_ServiceCatalogManagement.html

Adding Gauges to a Homepage

Note: *This article applies to Fuji. For more current information, see Discovery* [1] *at* http://docs.servicenow.com The Wiki page is no longer being updated. Please refer to http://docs.servicenow.com for the latest product documentation.

Overview

A gauge is visible on a ServiceNow homepage and can contain up-to-the-minute information about current status of records that exists on ServiceNow tables. Gauges can be created by the ServiceNow administrator or by users of ServiceNow with the gauge_maker role. Gauges can be created from reports or from lists of records on a table and can be sorted and filtered as needed.

Add a Gauge to a Homepage from the Homepage

You can add gauges to a homepage. You can make a report into a gauge from the report form. See this procedure for instructions.

1. Navigate to a homepage.
2. Click the add content icon (+) in top left corner of the homepage.
3. Select **Gauges** in the top left column of the **Add content** pop-up window.
4. Select a table in the top middle column.
5. Select the gauge that you want to add in the top right column.
6. Click the appropriate **Add here** button to place the gauge in the corresponding section of the homepage.
7. Click the close icon (⊗) in the top right corner when you finish adding gauges.

Arranging Gauges on a Homepage

Arrange gauges on custom homepages to customize your ServiceNow experience. You can always restore the homepages to the arrangement your system administrator created.

- Moving gauges: Click, hold, and drag the top gray bar of a gauge to move it to another area. Gauges in the top or bottom areas display at 100% of the available width. Gauges in the right, left, or center areas display at 50% of the available width. If gauges are added to all these areas, they display at 33% of the available width.
- Removing gauges: Click the close icon (⊗) to remove a gauge.
- Automatic refresh: Set gauges to refresh at given intervals by using the selector at the upper right corner. Automatic refresh is off by default.

Add a Report to a Homepage from the Report Form

A report must be made into a gauge before it can be added to a homepage. Users with the gauge_maker, admin, or report_admin role can make a report into a gauge. Gauges created from list reports do not preserve user list view preferences, such as the option to automatically expand grouped records.

1. Navigate to **Reports > View / Run**.
2. Open or create a report that you want to access from a gauge.
3. Click the down arrow next to the **Save** button and select **Make Gauge**.

    Note: If the report has already been made into a gauge this option is not available. Continue to the next step.
4. Click the down arrow next to the **Save** button and select **Add to Homepage**.
5. Select the homepage you want to add the gauge to.
6. Click **Add here** where you want to add the report.

Creating a New Gauge from a List of Records

In order to create lists of records (for example My Work, My Groups Work and Unassigned Incidents) as a gauge, you will need to have administrator rights.

1. Navigate to **System UI > Gauges**.
2. Click **New**.
3. Enter a unique name for your gauge.
4. In the **Type** field, select **List**.
5. Select a **Table**.
6. In the **Aggregate** field, select **Count**.
7. In the **Query** field, define the conditions that records must meet to be included in the gauge.

    Other fields on the form are not used when creating a list gauge.
8. Click **Submit** to save the gauge, or click **Try It** to save and view the new gauge.

    After you save the gauge, you can add it to a homepage.

URL Gauge Variable Height Workaround

URL gauges can be used to display a different web page or website as part of a homepage. URL gauges are set with a fixed height, meaning that you may have to scroll to see the entire web page in the gauge. URL gauge widths are controlled by the positioning of the gauge on a particular homepage. You cannot modify URL gauge height, but you can set up an iFrame in a UI page to manage the height.

First, create a UI page. The UI page name must start with `render_gadget_` (for example, `render_gadget_iFrameSNC`). Add the following to the **HTML** field, replacing the `src` with the URL that should appear in the iFrame. The height you specify must be a static value and you must use CSS style tags for this to work.

```
<iframe id="myframe" src="http://www.service-now.com" scrolling="yes" style="height:450px; width:100%"></iframe>
```

Next, navigate to **System UI > Widgets** and create or modify a widget that for selecting your UI page from the **Add content** pop-up window on a homepage. The widget script must reference your UI page. The widget **Name** must be the name of the category in the **Add content** pop-up window. For **Renderer type**, select **JavaScript**. The following script can be added to the **Script** field if you want to create a new widget.

```
function sections() {
  return {'ServiceNow' : { 'type' : 'iFrameSNC' }};
```

```
}

function render() {
  var type = renderer.getPreferences().get("type");
  var gf = new GlideForm(renderer.getGC(), "render_gadget_" + type, 0);
  gf.setDirect(true);
  gf.setRenderProperties(renderer.getRenderProperties());
  return gf.getRenderedPage();
}

function getEditLink() {
  return "sys_ui_page.do?sysparm_query=name=render_gadget_" +
renderer.getPreferences().get("type");
}
```

When the widget is saved, go to any homepage and add the new content.

Count Gauge Colors

In a count gauge, the count item color is based on the upper and lower limit values on the gauge panel. The following colors are used:

- **Red:** If the count result is greater than or equal to the upper limit.
- **Orange:** If the count result is between the upper and lower limit.
- **Green:** If the count result is less than or equal to the lower limit.

You cannot customize these colors.

Configuring Gauge Appearance

You can configure a gauge to display the report title, control the alignment and text size of the title, and display a border. To configure a gauge, click the widget appearance icon ( ) for that gauge.

References

[1] https://docs.servicenow.com/bundle/jakarta-it-operations-management/page/product/discovery/reference/r-discovery.html

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