How to Create a Dashboard

Quick Reference Guide

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How to Create a Dashboard

Dashboards allow you to display multiple Performance Analytics, reporting, and other widgets on a single screen. Use dashboards to create a story with data that can be shared with multiple users.
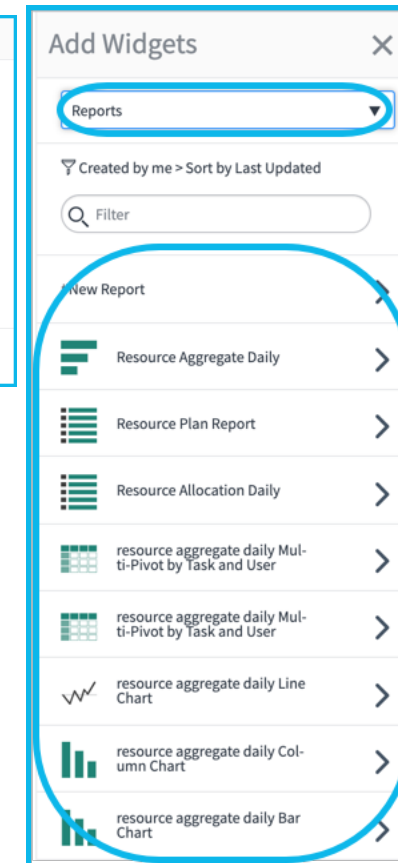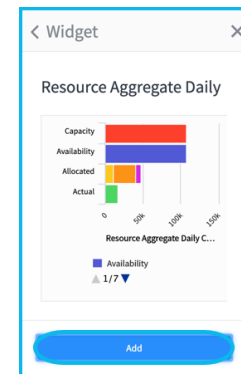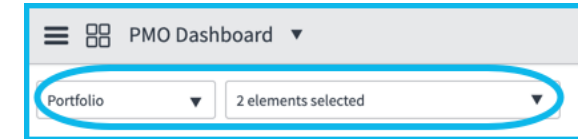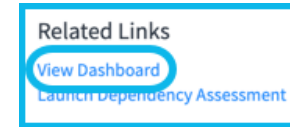
- **Create a Dashboard**

1. Type **"dashboards"** in the left hand navigation. Select **Dashboards** under Self-Service or Performance Analytics. Click **New.**

2. Complete the necessary fields. **Name** and **Owner** are required. Owner will auto populate with the individual logged in creating the dashboard. Right click on the header to open the **Context Menu.** Click **Save.**

   - **Group** allows you to provide an organizational hierarchy to the dashboards in the dashboard picker.

   - **Restrict to Roles** allows you to restrict access to the dashboard based on the security roles.

3. Once you save two related lists will be presented on the form, **Breakdown Source** and **Dashboard Tabs.** If necessary, define the breakdown sources by clicking the **Edit** button.


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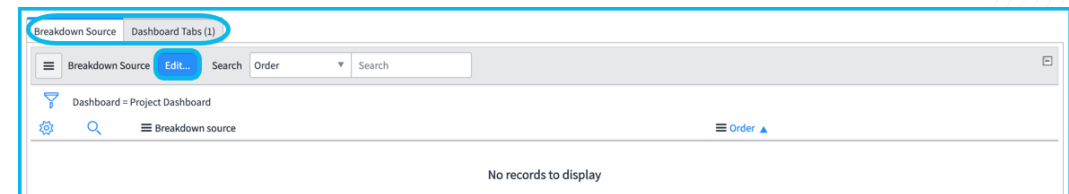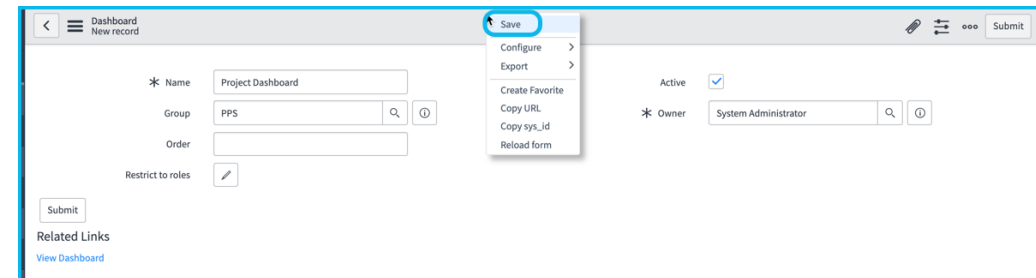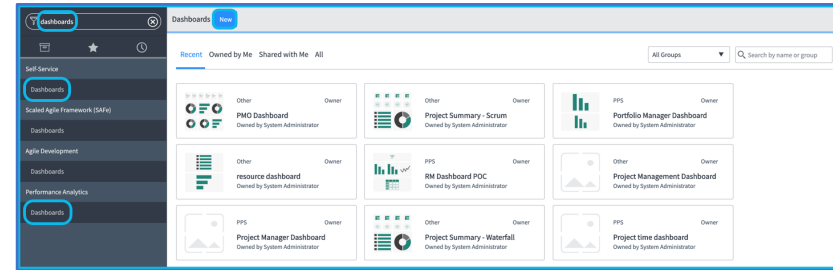
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4. Next, click the **View Dashboard** related link.

5.   If you selected Breakdown Sources, you will see the filter for the chosen sources.

6. Choose the Widgets icon (. +)

7   Select the appropriate widgets to add to the report from the drop down menu.

8. Next choose from the list of options for the chosen widget type.

9. Once you select the specific widget click the **Add** button. The widget will be added to the dashboard. You can then move the widgets by clicking on the header and dragging to the appropriate location.

10. Each individual widget can be modified. Hover over the top right corner to find the following icons:

Increase/decrease widget height

Refresh

Edit Widget

Remove
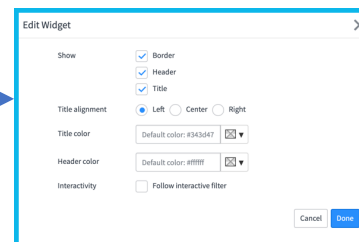
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11. Click the Configuration icon (≢)

12. Click **Create Tab** if you need to add additional tabs.

13. Choose a different **Dashboard Background** color, if necessary.

14. **Apply Quick Layout**, if necessary.

15. Close the window.

Share a Dashboard

1. Click on the Sharing icon (⬆)

2. Click Add groups, users, and roles.

3. Choose to share with All, Groups, Users, or Roles. Note: dashboards cannot be shared with anyone outside ServiceNow itself.

4. Choose the recipients in the To field.

5. Choose if the recipients can view or edit the dashboard.

6. Click Share.

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