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Tips and Tricks – ServiceNow Dashboard Considerations

By Lisa McGhee on August 24, 2022



ServiceNow Dashboard Considerations

Dashboards can display multiple reports and other [ServiceNow](#) content within widgets on a single page. Dashboard can be created for an individual but are most powerful when shared with a team or globally so that everyone sees the same relevant information.



Dashboard Benefits

A benefit of dashboards is that users can see the information on demand on their own schedule. The dashboard data is real-time and dynamic. Dashboard users can drill into data points to see the specific records that make up that data.

Dashboard Planning

Before creating a dashboard take time to get requirements and plan. First, determine what the purpose of the dashboard will be. Other planning questions to ask is who will be the audience or consumer of the data? What story are you trying to tell and what information should be included?

Talk with the audience that will be using the dashboard. Determine what information is important to them. For fulfiller users determine what information will allow them to work most efficiently and look for opportunities to increase their productivity.

A dashboard for managers or leadership will be very different than what fulfiller teams need. Find out what KPI's or other statistical information they need. The dashboard could be a combination of all the reports you would normally send to the managers.

Preparing the Content

The most used content for dashboards is reports. Create or identify the ServiceNow reports you want to include on the dashboard. When preparing the reports keep in mind that dashboards with a balance of both graphical reports and lists are both informational and visually pleasing.

If you intend on sharing the dashboard you will need to **share the reports first**. From the reports editor share the reports with the assignment groups or individuals you will be sharing the dashboard with. If you miss this step, your users won't be able to see the dashboard content.

It is best practice to share with groups since group membership can be updated as individuals change roles or there is attrition.

Design Considerations

When you have multiple audiences that want to see similar data with very different needs consider using a single dashboard with multiple tabs. Each tab has a separate dashboard canvas and layout. Each tab can have its own dashboard content targeted for the audience.

An example is a dashboard with an “Ops” tab where the content is geared to the needs of the operations team. Another tab, “Leads & Mgrs” has the content leads and managers need to see how the operations team is performing.

Learn More

Before spending time and resources building a dashboard keep in mind that ServiceNow has a selection of dashboards out-of-the box. You may find that there is a dashboard that already fits your business needs.

Let **Covestic** help you with your reporting and dashboard consulting needs.

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