

# BMC Helix Dashboards 25.x: Fundamentals

## Designing for Service Management



ABSTRACT

[Learning Path >](#)

Course Code: SPPT-HDFD-2520

| Modality                      | Duration | Applicable Versions       | Target Audience   |
|-------------------------------|----------|---------------------------|---|
| Instructor-Led Training (ILT) | 3 days   | BMC Helix Dashboards 25.2 | <ul style="list-style-type: none"><li>Administrators</li><li>Developers</li><li>Consultants</li></ul> |

### Course Overview

BMC Helix Dashboards is a service on the BMC Helix Portal that can be used to create interactive dashboards for your environment. It can be accessed from BMC Helix Portal and is available for SaaS as well as On-premises customers.

BMC Helix Dashboards uses Grafana as the underlying solution and enables you to customize the dashboards in multiple ways to gain valuable insights into your environment. It offers unified reporting and gives you a consolidated view of data from applications across your environment. You can easily create, export, and share interactive dashboards with users within or outside your environment.

This course will focus on designing dashboards for Service Management applications such as BMC Helix ITSM, BMC Helix Digital Workplace, and BMC Helix Business Workflows. This course is applicable to BMC Helix Dashboards designers and administrators who will be guided through the step-by-step process, from navigating the console to designing various complex dashboards using Visual Query Builder, Form, and SQL query types. Some advanced concepts like Drill through functionality, custom calculated fields, multi-query based panels, configuring Reporting Metadata Studio, and creating custom metadata views will be explained. Additionally, they will learn to build some common use cases of dashboards that draw and analyze data from Service Management.

### Learning Objectives

- BMC Helix Dashboards overview
- Understand dashboard components and panel options
- Define roles and permissions
- Review and analyze various out-of-the-box dashboards
- Configure dashboard settings and explore various visualizations
- Learn about the Overrides, Suggestions, and Advanced Transform features
- Use chained variables, custom calculated fields, Row and Repeat functions
- Follow the best practices for dashboard design
- Design Service Management dashboards using Visual Query Builder, Form and SQL query types
- Design a Cross-tab panel with Drill-through functionality
- Design a BMC Record Details visualization-based dashboard
- Design a dashboard to use the Union query
- Design an Incident age-based Buckets dashboard
- Design a Top N Series dashboard with Time Series visualization
- Design a BMC Helix Digital Workplace dashboard
- Design a BMC Helix Business Workflows dashboard
- Install and configure Reporting Metadata Studio
- Create Custom Metadata Views

## Course Modules

### Module 1: Introduction to BMC Helix Dashboards

- Overview of BMC Helix Dashboards
- Understand the features and functionalities
- Access and navigate the BMC Helix Dashboards console
- Explore the dashboard roles
- Manage dashboards and folders
- Review and analyze Out-of-the-box dashboards for BMC Helix ITSM
- Overview of dashboard and panel options
- Understand dashboard components
- Configure dashboard settings
- Use the Self-help Resources Widget
- Modify out-of-the-box dashboards
- Understand Variables
- Work with the JSON model
- Export and Import dashboards
- Managing permissions

### Module 2: Building Dashboards

- Understand queries and visualizations
- Configure a dashboard's time range
- Design a dashboard using Visual Query Builder
- Use some basic Transform functions
- Create a Cross-tab Incident dashboard
- Add Drill-through functionality to the Cross-tab visualization
- Visualize data as records in your panels
- Explore field database names and labels in BMC Developer Studio

### Module 3: Designing Dashboards Based on SQL Queries

- Build Service Management queries using the Form type and SQL type editors
- Create a union query-based dashboard
- Create a dashboard based on bucket analysis
- Use Pie Chart and BMC Bar Chart visualizations
- Create and use a custom calculated field
- Use Advanced Transform functions
- Configure Value Mappings

### Module 4: Building Time Series Dashboards

- Create a Top N Times Series Chart dashboard
- Reference Grafana Time Range variables within a query
- Use multiple queries in a single panel

### Module 5: Additional Service Management Dashboards

- Create a complex multi-panel dashboard that extracts and analyzes data from BMC Helix Digital Workplace
- Create a table to view service requests grouped by fulfillment method
- Create a panel to summarize DWP Survey Results
- Enable Column Filters
- Create a dashboard that analyzes case-related data from BMC Helix Business Workflows
- Define chained variables
- Use the BMC Combination Chart visualization to track the counts of raised, open, closed, and pending cases
- Use the Row and Repeat functionalities to auto-generate panels

### Module 6: Building Custom Metadata Views

- Create a complex multi-panel dashboard that extracts and analyzes data from BMC Helix Digital Workplace
- Install and configure Reporting Metadata Studio
- Create a Custom view
- Define Global Constraints
- Build a dashboard based on the Custom view

#### Discount Options

**Have multiple students?** Contact us to discuss hosting a private class for your organization.

Contact us for additional information 