knowledge15®
April 19–24, 2015 • Mandalay Bay • Las Vegas, NV

Lab Guide

Reporting 101:

The Basics

Getting Value From Your Data

Matt Dodd & Pieter Goris

Default Login / Password:

admin / Knowledge15

itil / Knowledge15

employee / Knowledge15

This

Page

Intentionally

Left

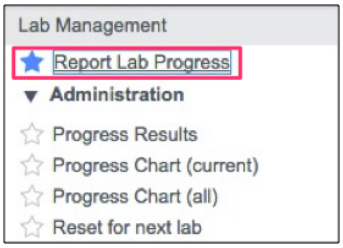
Blank

Introduction

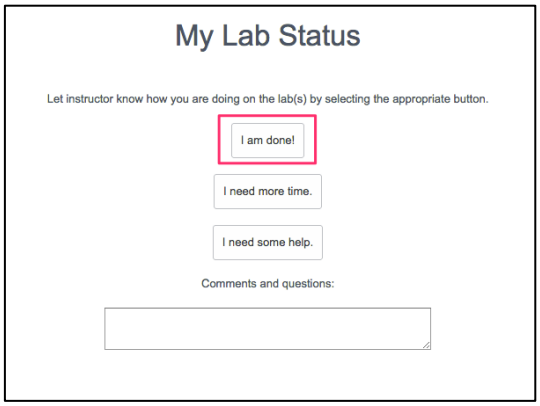
If you are taking this class in the live Lab at K15, please use the Lab Management application within your instance. This allows the instructor to determine the pace of the class and move at the appropriate speed with the class. Use the **Report Lab Progress** option when you complete any Lab, and also whenever you need to ask for more time, or ask for help.

Progress Reporting

1. Navigate to **Lab Management> Report Lab Progress**.



2. Click **I am Done!**



®2015 ServiceNow, Inc. All rights reserved.

Lab Goal

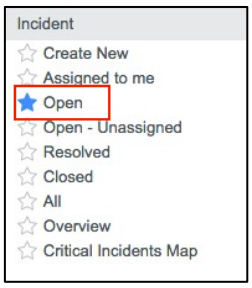
This lab explores the basics of reporting within ServiceNow lists. The following exercises explain how to filter data, create a personal filter, and convert the list of data into a visual representation.

Lab 1.1
Create a List Filter

Log on to Your Training Instance

1. Navigate to the unique instance URL provided to you and log in using the **admin** user's credentials from the cover of this guide.

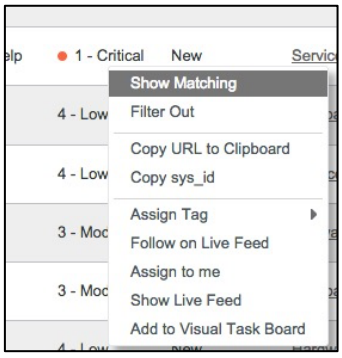
2. Navigate to **Incident > Open** from the menu.



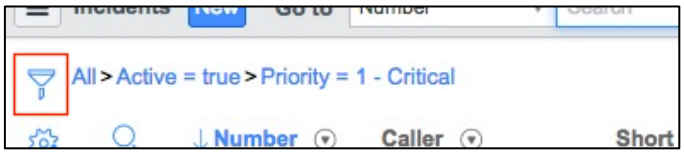
©2015 ServiceNow, Inc. All rights reserved.

Filtering List Data

1. Right-click in a field that contains the value **1-Critical**, and select the **Show Matching** option.

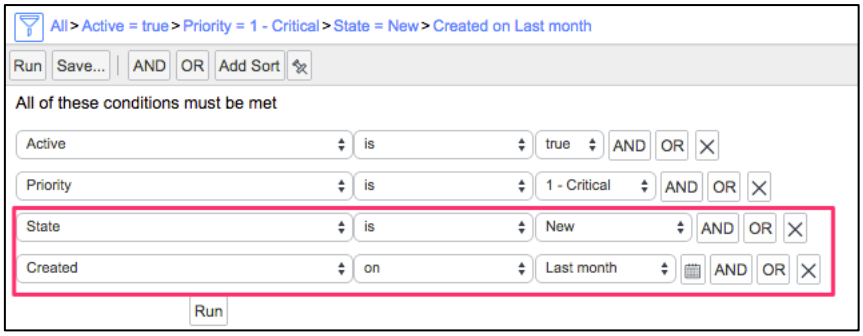


2. Notice that the list refreshes and removes any records in which the Priority is not **1-Critical**. Also note that the breadcrumb reflects this option. Expand the list filter by clicking the **filter button** at the left of the breadcrumb trail.



3. Add the following conditions to the Condition Builder.

   +AND + State + is + New
   +AND + Created + on + Last month

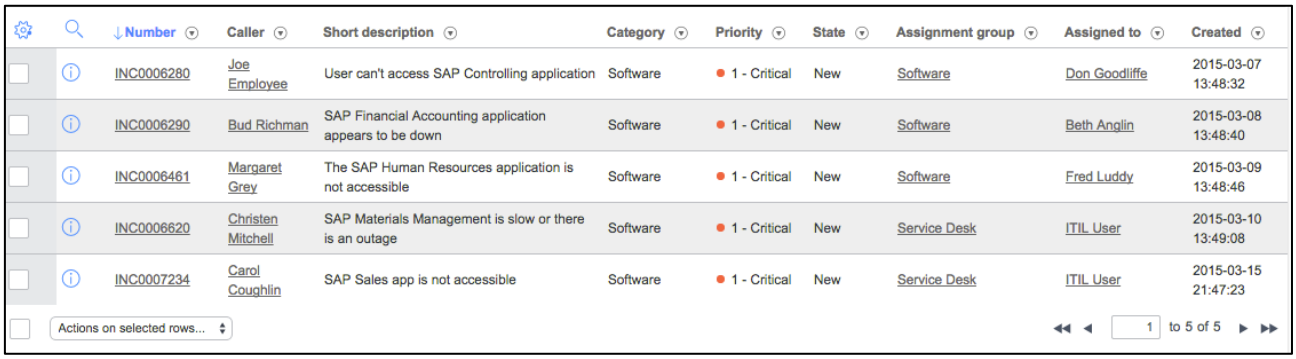


4. Click **Run**.

©2015 ServiceNow, Inc. All rights reserved.

Lab Success Verification

1. The List view should look like the example below.



Number	Caller	Short description	Category	Priority	State	Assignment group	Assigned to	Created
INC0006280	Joe Employee	User can't access SAP Controlling application	Software	1 - Critical	New	Software	Don Goodliffe	2015-03-07 13:48:32
INC0006290	Bud Richman	SAP Financial Accounting application appears to be down	Software	1 - Critical	New	Software	Beth Anglin	2015-03-08 13:48:40
INC0006461	Margaret Grey	The SAP Human Resources application is not accessible	Software	1 - Critical	New	Software	Fred Luddy	2015-03-09 13:48:46
INC0006620	Christen Mitchell	SAP Materials Management is slow or there is an outage	Software	1 - Critical	New	Service Desk	ITIL User	2015-03-10 13:49:08
INC0007234	Carol Coughlin	SAP Sales app is not accessible	Software	1 - Critical	New	Service Desk	ITIL User	2015-03-15 21:47:23

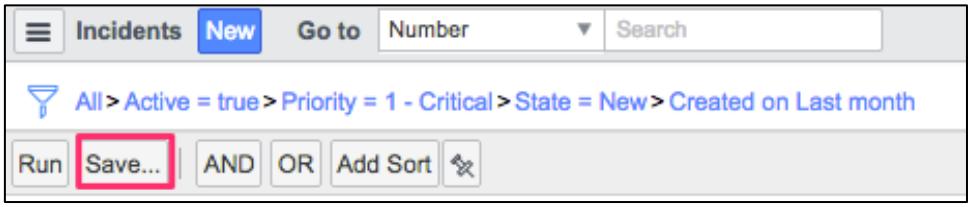
Actions on selected rows... 1 to 5 of 5

Lab Challenge – Create a Personal Filter

1. Expand the filter again by clicking the filter button at the left of the breadcrumb trail.



2. Click **Save**.



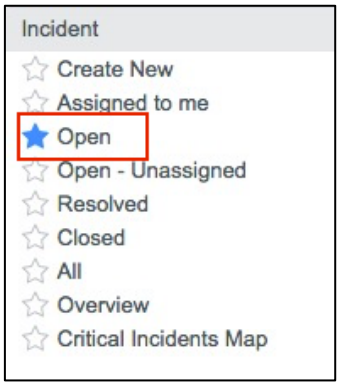
3. Enter **Priority 1 – Last Month** as the filter name and click **Save**.



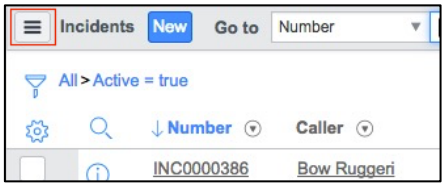
©2015 ServiceNow, Inc. All rights reserved.

Lab Challenge Verification

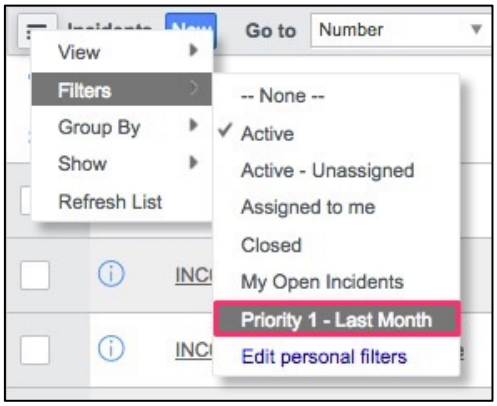
1. Navigate to **Incident > Open**.



2. Click the **list control** icon next to the **Incidents** heading.



3. Select **Filters > Priority 1 – Last Month**.



4. The view should refresh again and recreate the view that you created manually before. You can create your own personal filters for specific data sets that you might use regularly.

   NOTE: You can manage and edit your saved filters by selecting the **Edit personal filters** option from the same list control option shown previously.

©2015 ServiceNow, Inc. All rights reserved.

Removing Breadcrumb Selections

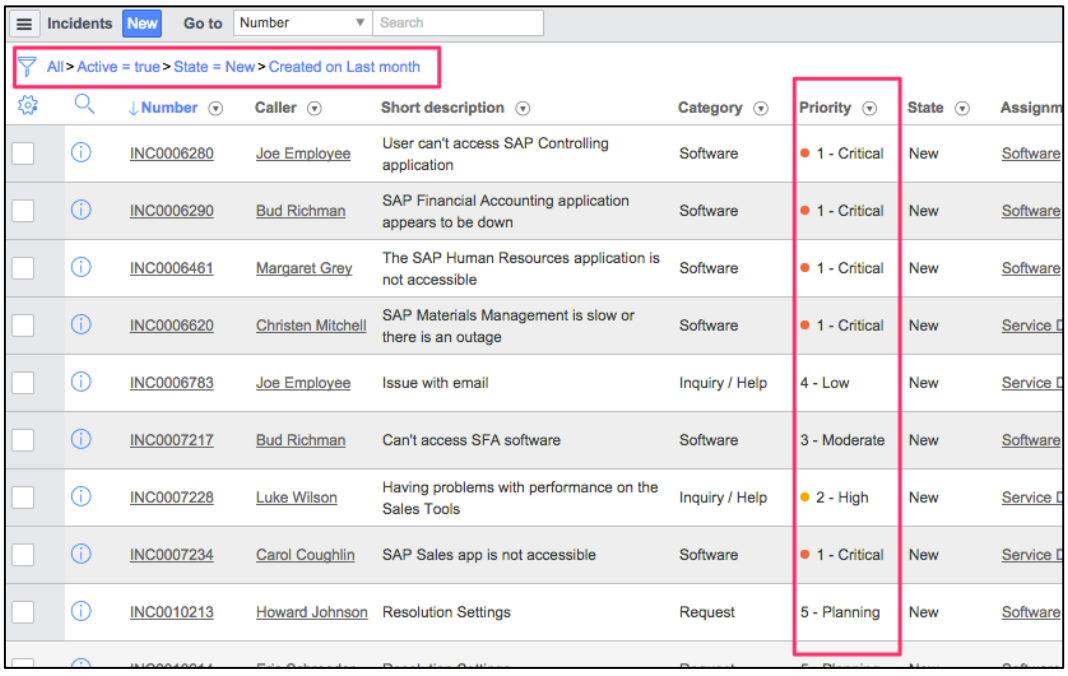
1. Hover the mouse over the **>** icon at the left of the **Priority 1 – Critical** breadcrumb so that it appears with a strikeout line through the item. Click the **>** icon when it is in this state to remove that specific part of the filter.



NOTE: Do not click the **Priority 1 – Critical** item because this will remove *all* of the breadcrumbs following this item in addition to the item. If you accidently click this, use the browser navigation **Back** button to return to the previous screen and correct the error.

Lab Success Verification

1. Check that the list view now shows **all** Priority values, but is still filtering the **state = New** and **Created on Last Month** options.

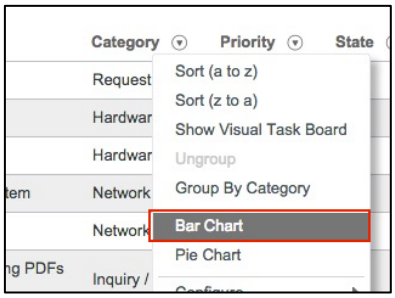


Number	Caller	Short description	Category	Priority	State	Assignm
INC0006280	Joe Employee	User can't access SAP Controlling application	Software	1 - Critical	New	Software
INC0006290	Bud Richman	SAP Financial Accounting application appears to be down	Software	1 - Critical	New	Software
INC0006461	Margaret Grey	The SAP Human Resources application is not accessible	Software	1 - Critical	New	Software
INC0006620	Christen Mitchell	SAP Materials Management is slow or there is an outage	Software	1 - Critical	New	Service D
INC0006783	Joe Employee	Issue with email	Inquiry / Help	4 - Low	New	Service D
INC0007217	Bud Richman	Can't access SFA software	Software	3 - Moderate	New	Software
INC0007228	Luke Wilson	Having problems with performance on the Sales Tools	Inquiry / Help	2 - High	New	Service D
INC0007234	Carol Coughlin	SAP Sales app is not accessible	Software	1 - Critical	New	Service D
INC0010213	Howard Johnson	Resolution Settings	Request	5 - Planning	New	Software

®2015 ServiceNow, Inc. All rights reserved.

Convert the List Data into a Graph/Chart

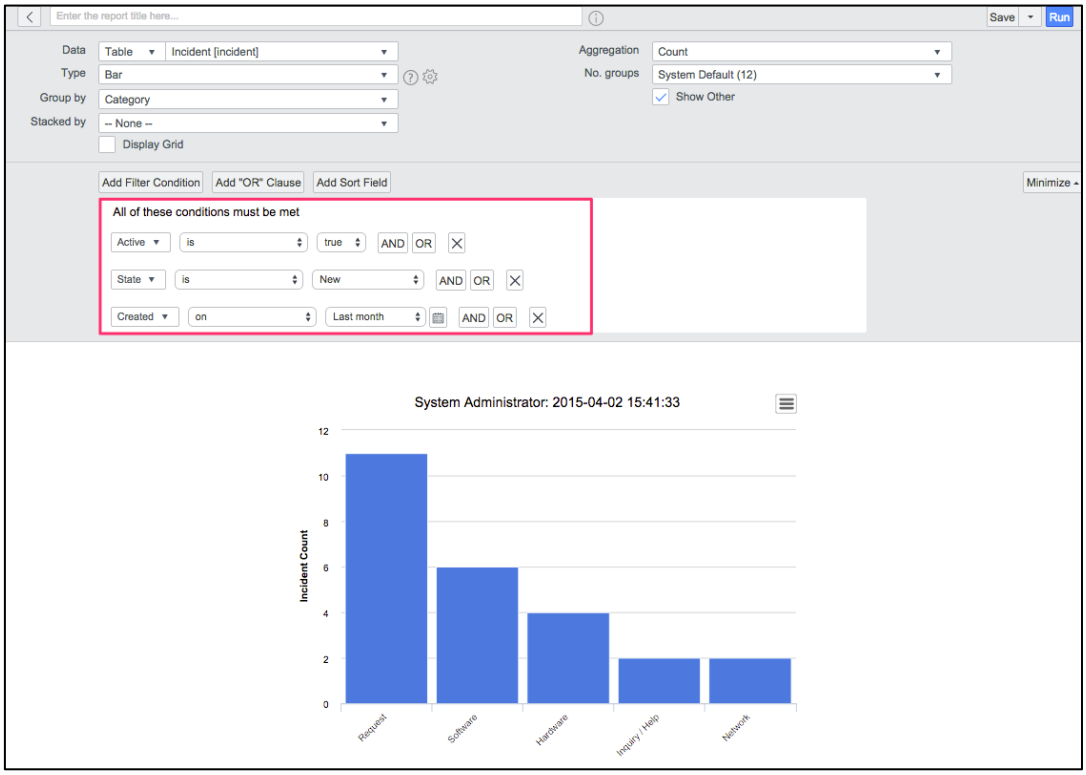
1. Click the down-arrow in the **Category** column heading and select the option **Bar Chart**. (You could optionally use a right-click in the column header for this).



Lab Success Verification

1. The screen should now look like the example below.

   NOTE: You are now in the **Report Builder** module. Notice that the filtering conditions from the list view are carried across to the reporting module and can be modified further from here if required. Later labs explore this interface further.



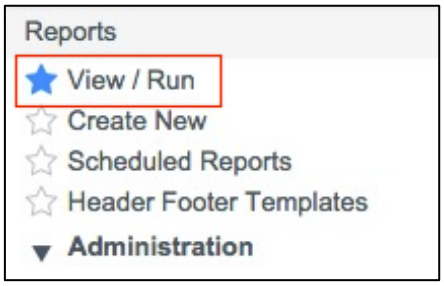
©2015 ServiceNow, Inc. All rights reserved.

Lab Goal

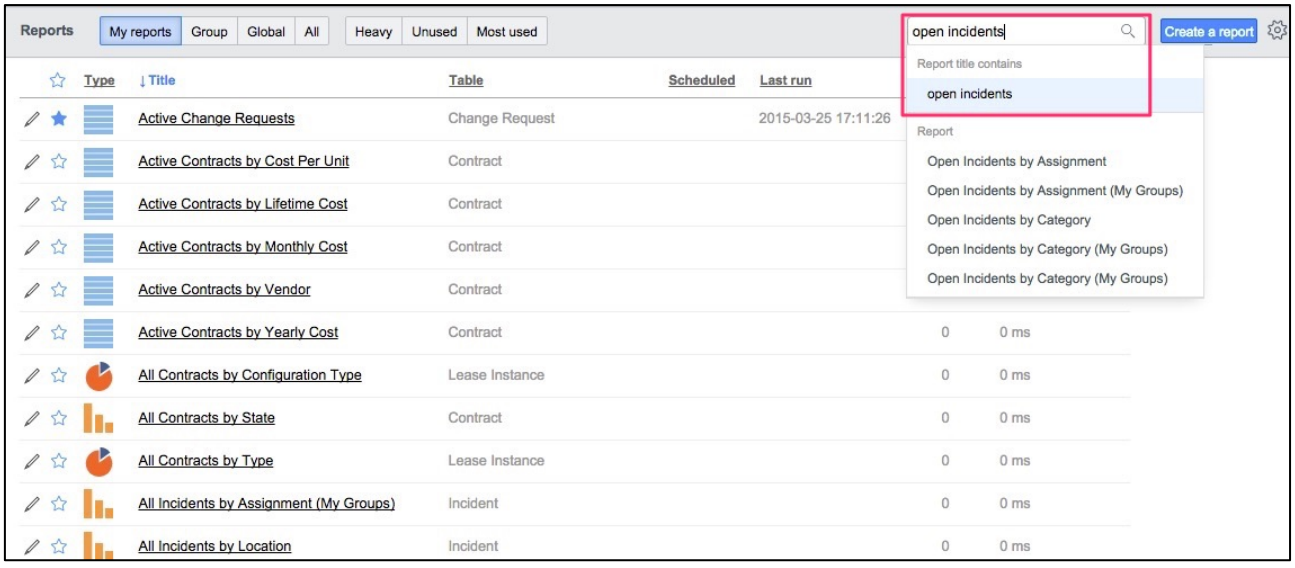
This lab explains how to leverage an existing report and modify it to suit your needs. IT can also help you understand some of the new report navigation and searching functions included in the current Fuji release.

Lab 2
Modify an Existing Incident Report

1. Navigate to **Reports > View/Run**.

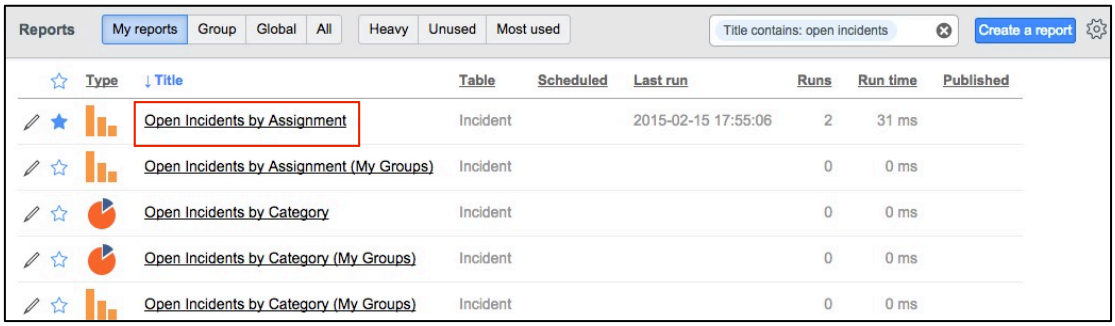


2. Search for a report, using the search function at the top-right of the window. Type **Open incidents** into the search box and press **Enter**.

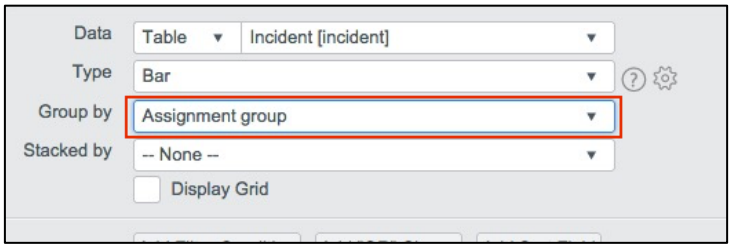


®2015 ServiceNow, Inc. All rights reserved.

3. Click the **Open Incidents by Assignment** report title. This will open the report for you in a similar view to what you saw at the end of the previous lab.



4. Within the Report Builder, change the **Group By** field to **Assignment Group**.



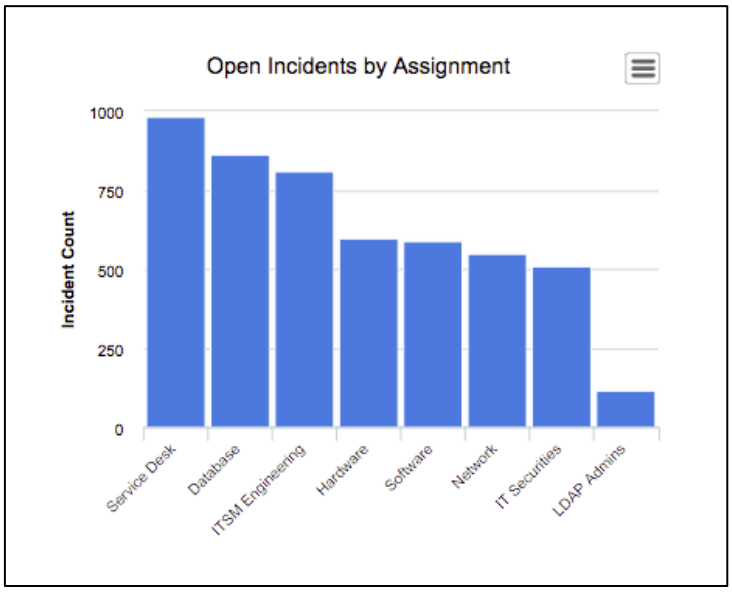
5. Within the Report Builder, click the **Add Filter Condition** button and add the following condition:

   Priority + **is not** + **5 – Planning**



®2015 ServiceNow, Inc. All rights reserved.

6. Click **Run**. You should see a report similar to the one below.



NOTE: This report helps visualize the Incidents assigned to the various Assignment Groups; it does not provide a context around the priority of those Incidents. Next we explore a technique to help build a context for the Incident priorities.

7. Within the Report Builder, set the **Stacked By** field to **Priority**.



NOTE: To find the value more quickly, filter the fields shown in the dropdown list by typing the characters into the search box that appears at the top of the list.

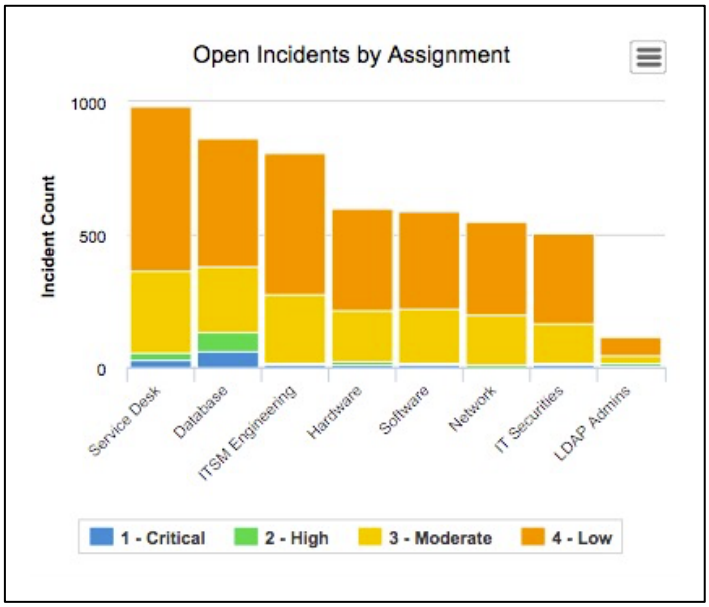


8. Click **Run**.

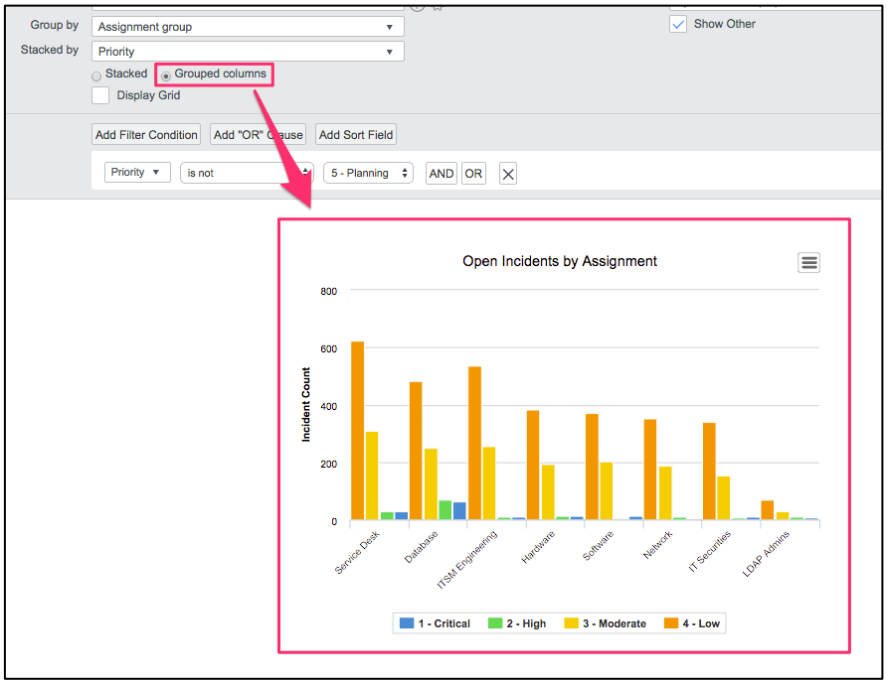
©2015 ServiceNow, Inc. All rights reserved.

Lab Success Verification

1. The list view should look like the example below.



NOTE: There is also a **Stacked by** option for Grouped Columns instead of vertical stacking, depending on the kind of representation you need.



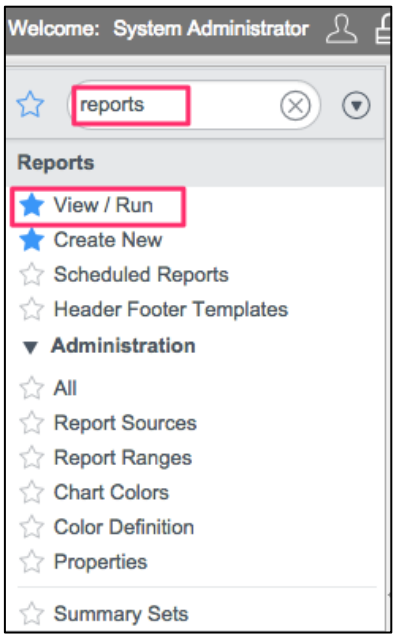
©2015 ServiceNow, Inc. All rights reserved.

Lab Goal

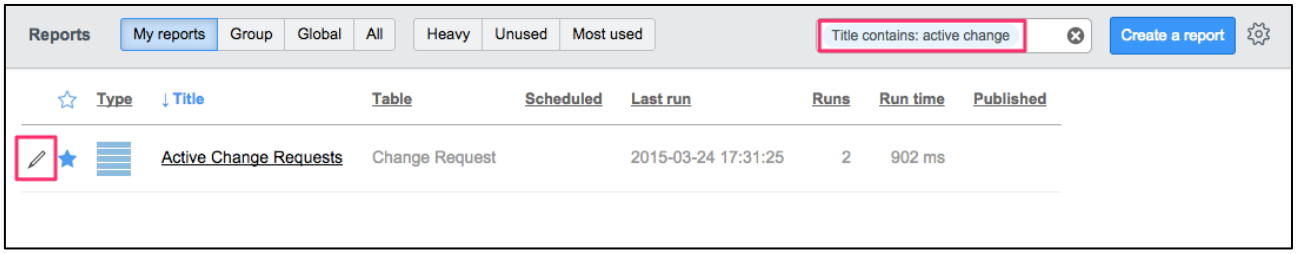
This lab digs deeper into the power of Reporting on the ServiceNow platform. The exercise uses an existing Change Report and modifies it for a new Change Report.

Lab 3
Modify an Existing Report

1. Navigate to **Reports > View/Run**.



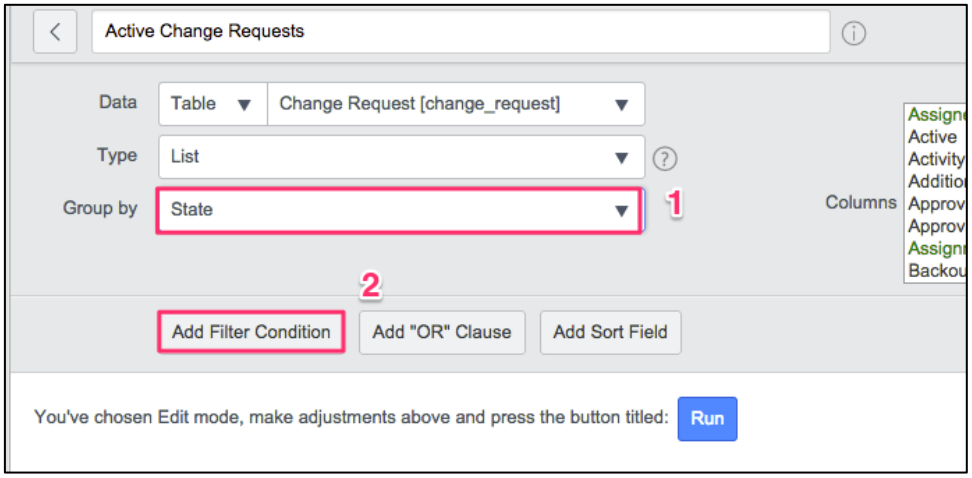
2. Search for the **Active Change Requests** report, and click **Edit**.



®2015 ServiceNow, Inc. All rights reserved.

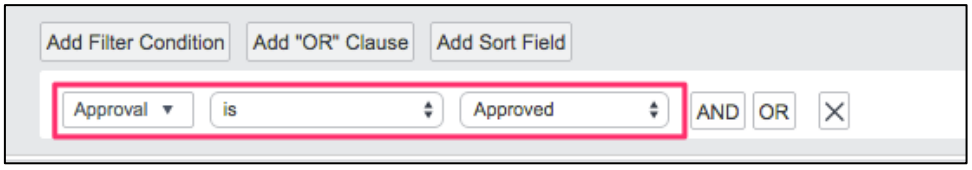
3. Within the **Report Builder**, complete the following:

   Group by: **State**
   Click **+ Add Filter Condition**



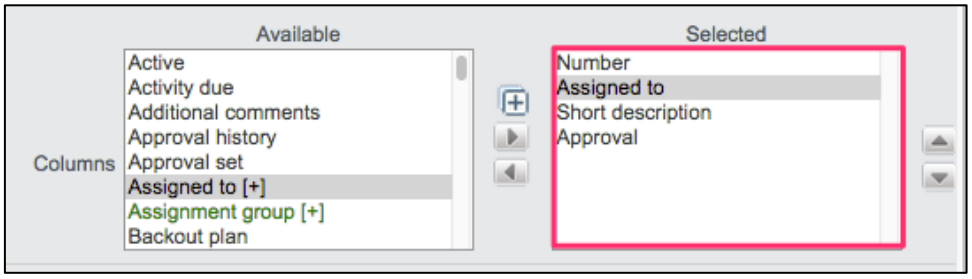
4. Add the following condition:

   Approval is Approved



5. Using the slush buckets, click the right arrow to add the following fields to the report:

   Number
   Assigned to
   Short description
   Approval

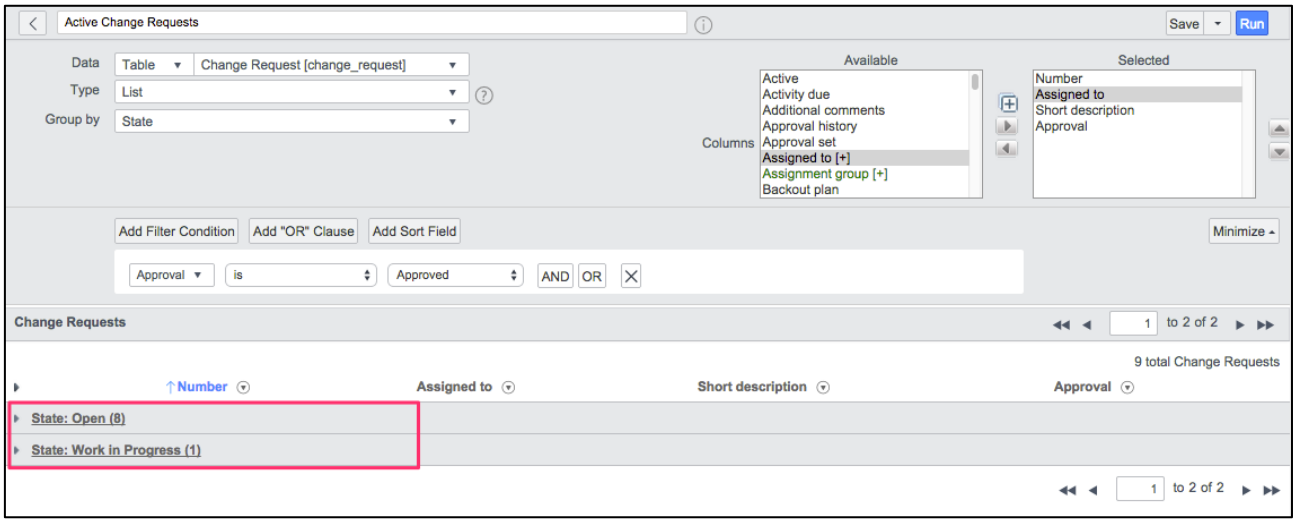


NOTE: You can also use the left arrow to remove fields from the selected list, and also the up and down arrows (on the right) to reposition the fields on the form.

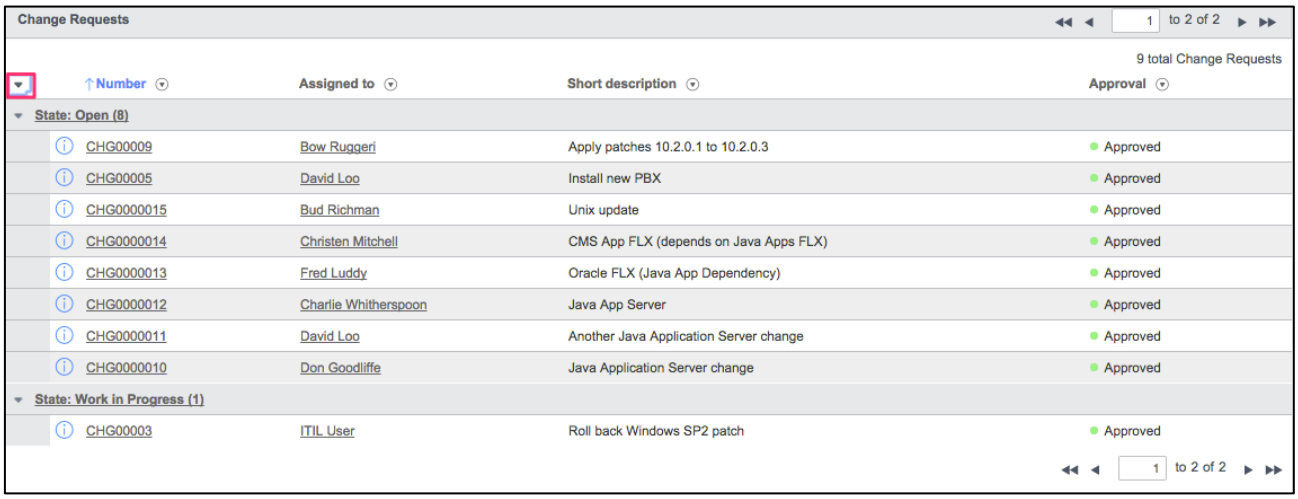
©2015 ServiceNow, Inc. All rights reserved.

Lab Success Verification

1. Click **Run Report**. The report should look like the example below.



NOTE: You can also expand out the report by clicking on the arrow at the top left of the grid.



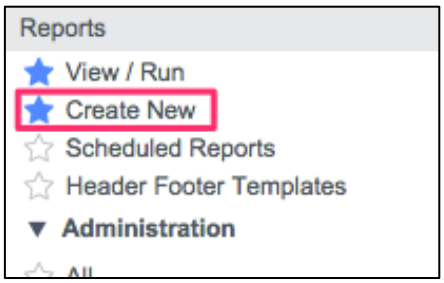
®2015 ServiceNow, Inc. All rights reserved.

Lab Goal

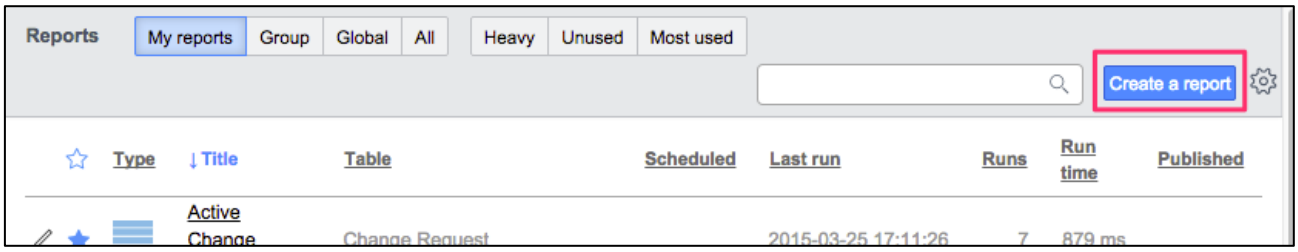
This lab explains how to create a new List Chart when it is not possible to modify an existing report to fill specific needs.

Lab 4
Create a New List Report

1. Navigate to **Reports** > **Create New**.



NOTE: You can also create a new reporting from the View/Run report list, using the **Create a report** button.

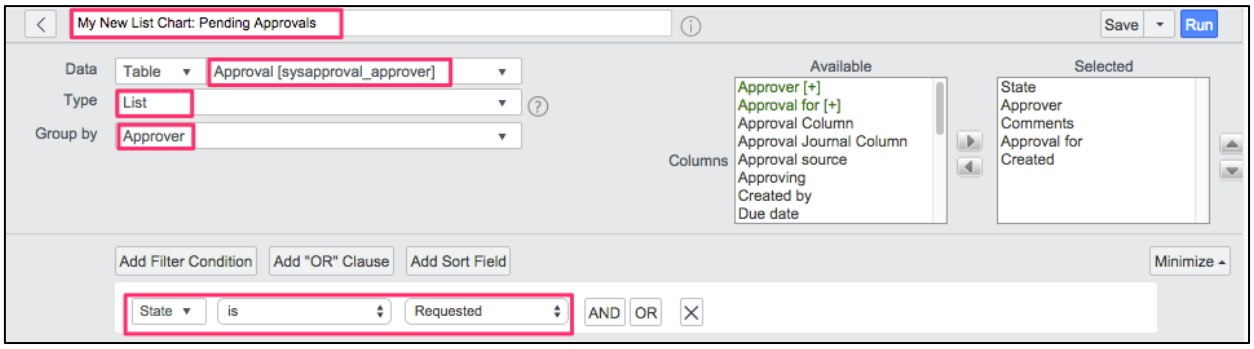


©2015 ServiceNow, Inc. All rights reserved.

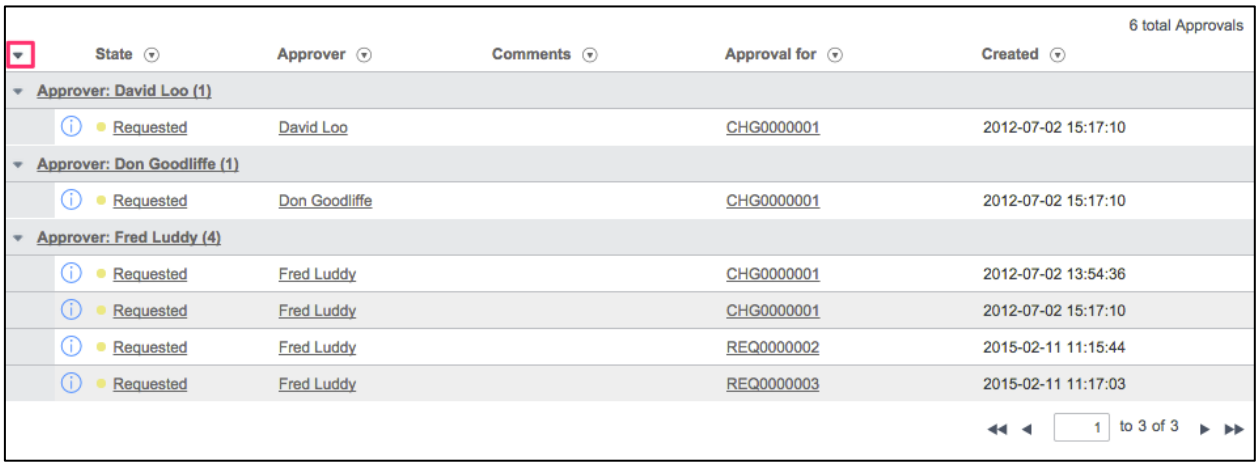
2. Within the Report Builder, complete the following:

   Name: **My new List Chart: Pending Approvals**
   Table: **Approval [sysapproval_approver]**
   Type: **List**
   Group by: **Approver**

   And then add a Filter Condition:
   State is Requested



3. Click **Run.** Then click on the small arrowhead in the top left corner to expand the rows under each Grouping (highlighted below). The report should look like below.



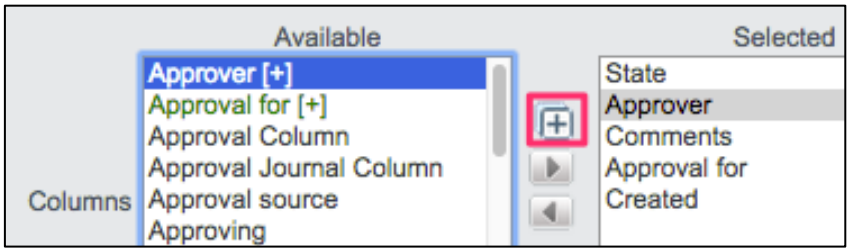
NOTE: The total number of records is shown as 3 (bottom right) since we asked for the report to be grouped, however the total number of approvals within this report is 6 (top right). The number of approvals for each grouping is shown as a number in the brackets after the grouped column value in the report.

©2015 ServiceNow, Inc. All rights reserved.

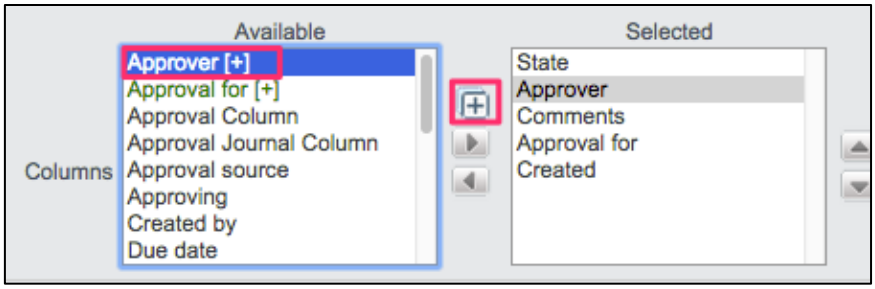
Lab Challenge: Extend the information presented beyond the base table.

ServiceNow allows a concept called dot-walking, which allows information that is stored in a table outside the current table to be shown on the report, or used as a filter or grouping for the report also. We will explore this concept by adding the Manager of the currently requested Approver to the report we have been working on.

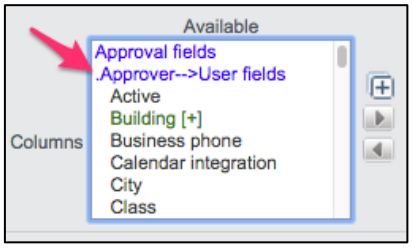
Data which we can use for dot-walking can be identified in the slush bucket lists by their green color, and also the [+] symbol after their name. When you click on one of these columns you will see a new + button appear between the Available and Selected lists. This button will give access to the fields from the table that holds the data for the specific field you have selected.



1. Click on the **Approver** field in the Available slush-bucket list. Then click on the **+** button that appears between the slush bucket lists.



Note: The slush-bucket list will now re-render and show an additional indentation under the Approver field to indicate that you are now dot-walking to the Approver record.

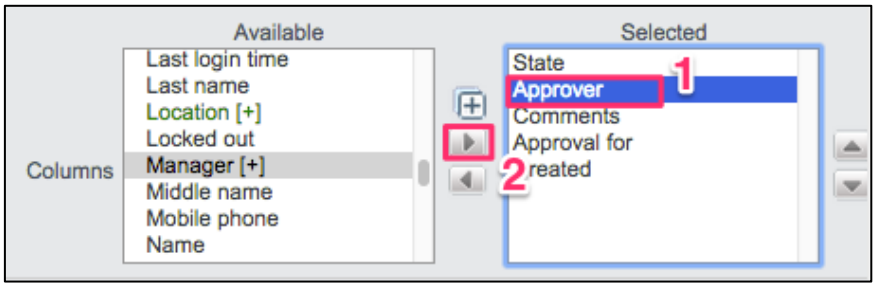


©2015 ServiceNow, Inc. All rights reserved.

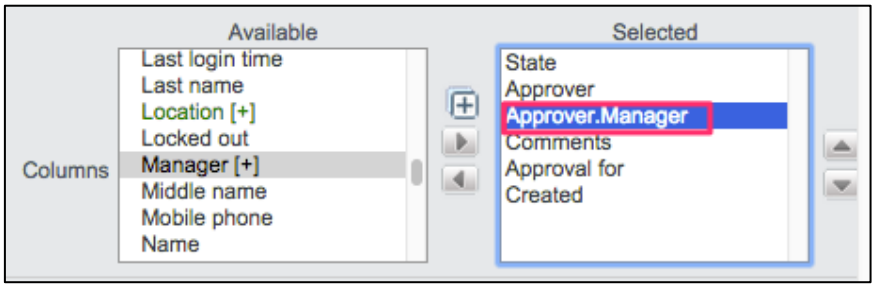
2. Scroll down the Available slush-bucket list to find the field called **Manager** and click on it, to highlight it.



3. Click on the **Approver** field in the Selected slush-bucket list to highlight it also, then click on the **Right Arrow** button between the slush-bucket lists to add the Manager field to the Selected slush-bucket list.



NOTE: The new field should be added below the field we highlighted in the Selected slush-bucket list. The name of this field uses the dot notation to indicate that this field has come from the Approver record. It should look like the screen capture below.

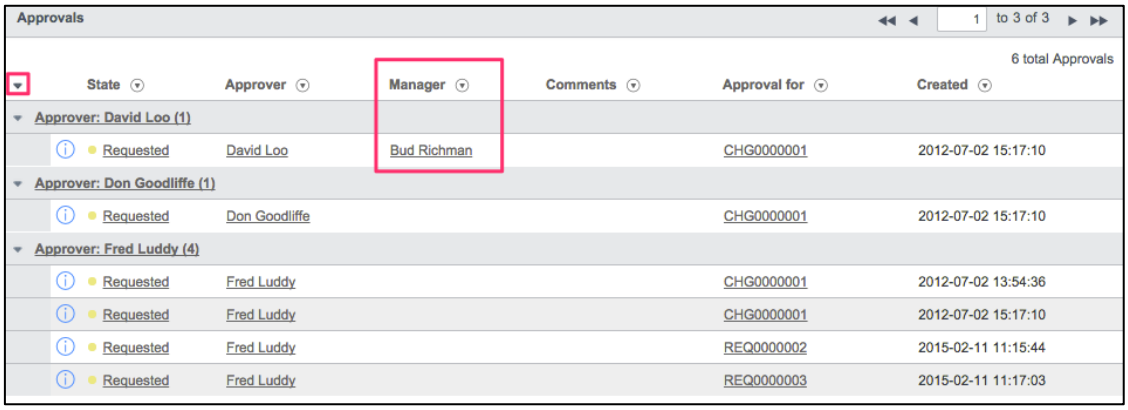


4. Click **Save**.

©2015 ServiceNow, Inc. All rights reserved.

Lab Challenge Verification

1. The final report produced should look like the example below.



Approvals — 1 to 3 of 3 — 6 total Approvals

State	Approver	Manager	Comments	Approval for	Created
Approver: David Loo (1)					
Requested	David Loo	Bud Richman		CHG0000001	2012-07-02 15:17:10
Approver: Don Goodliffe (1)					
Requested	Don Goodliffe			CHG0000001	2012-07-02 15:17:10
Approver: Fred Luddy (4)					
Requested	Fred Luddy			CHG0000001	2012-07-02 13:54:36
Requested	Fred Luddy			CHG0000001	2012-07-02 15:17:10
Requested	Fred Luddy			REQ0000002	2015-02-11 11:15:44
Requested	Fred Luddy			REQ0000003	2015-02-11 11:17:03

NOTE: Only users who have a Manager defined in their user record will display a value for this field in the report.

This report could be useful for identifying Pending Approvals that require auctioning, and the users manager should the need for escalation arise.

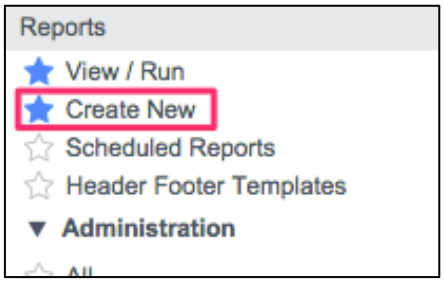
©2015 ServiceNow, Inc. All rights reserved.

Lab Goal

This lab explains how to create a graphical report using the Pie Chart report type. Graphics help the end user visualize data for more impactful representation of the data, allowing quicker conclusions to be made at a glance.

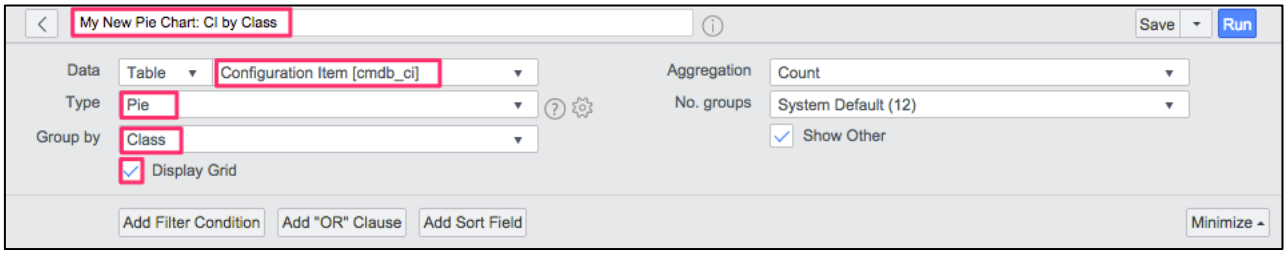
Lab 5
Create a Pie Chart

1. Navigate to **Reports > Create New**.



2. Within the **Report Builder**, set the following values:

   Name: **My new Pie Chart: CI by Class**
   Table: **Configuration Item [cmdb_ci]**
   Type: **Pie Chart**
   Group by: **Class**
   Select the option: **Display Grid**

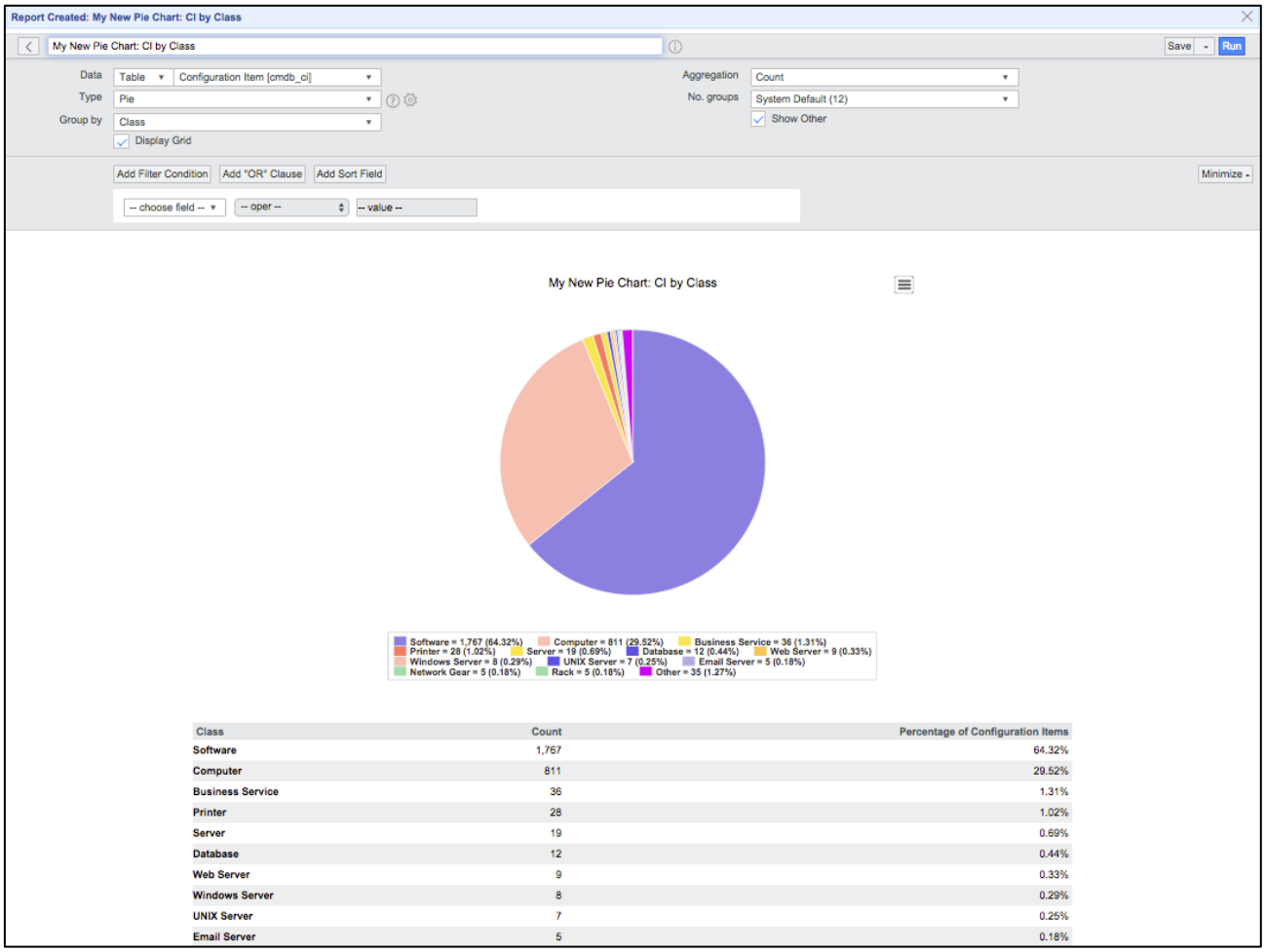


3. Click the **Save** button to save the report.

©2015 ServiceNow, Inc. All rights reserved.

Lab Success Verification

1. The report should look like the example below.



Class	Count	Percentage of Configuration Items
Software	1,767	64.32%
Computer	811	29.52%
Business Service	36	1.31%
Printer	28	1.02%
Server	19	0.69%
Database	12	0.44%
Web Server	9	0.33%
Windows Server	8	0.29%
UNIX Server	7	0.25%
Email Server	5	0.18%

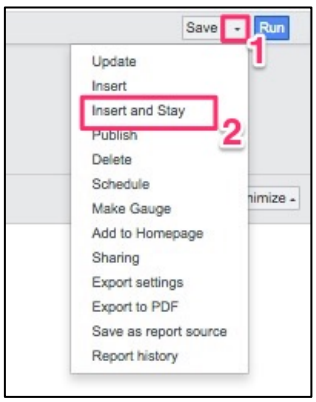
®2015 ServiceNow, Inc. All rights reserved.

Lab Challenge – Quickly create a new variation of this report

1. Change the following values in the Report Builder.

   Name: **My New Pie Chart: Server by Class**
   Table: **Server [cmdb_ci_server]**

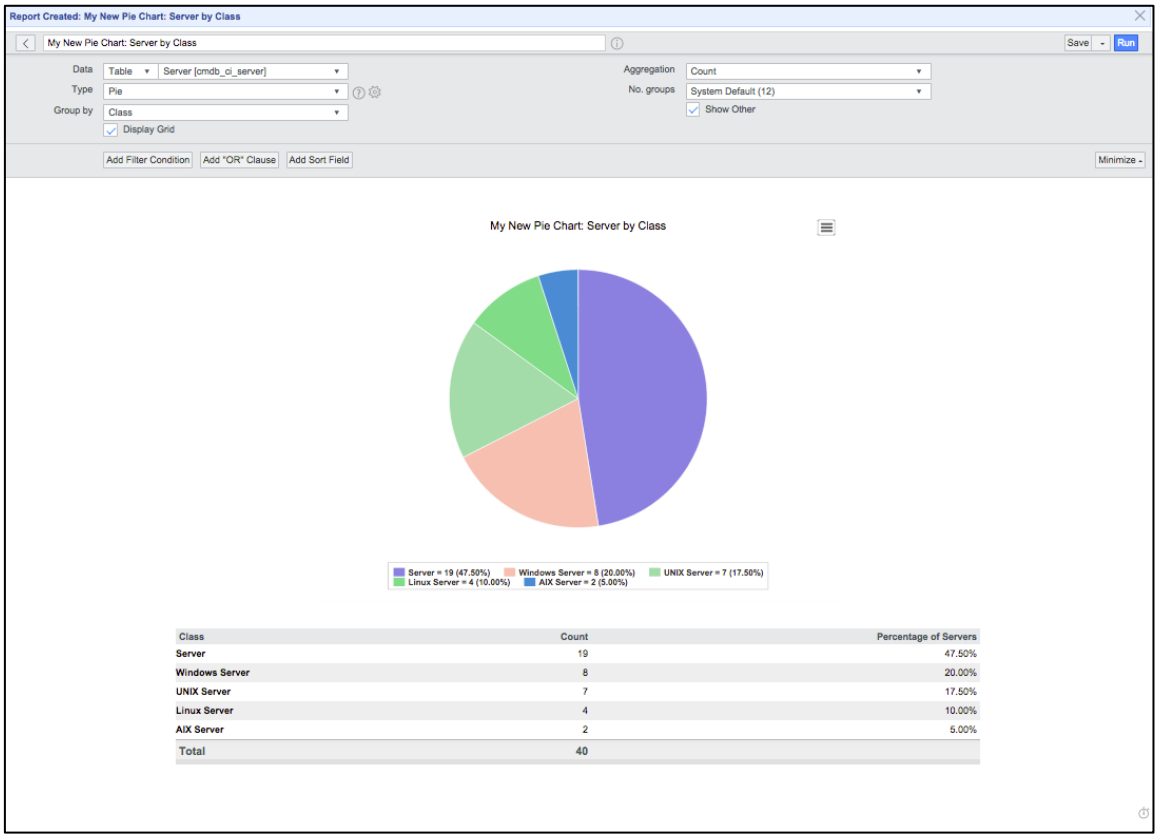
2. Click the **down-arrow** next to the Save button, and select **Insert and Stay** from the list.



®2015 ServiceNow, Inc. All rights reserved.

Lab Challenge Verification

1. A new version of the report will be saved with the name provided.



Class	Count	Percentage of Servers
Server	19	47.50%
Windows Server	8	20.00%
UNIX Server	7	17.50%
Linux Server	4	10.00%
AIX Server	2	5.00%
Total	40	

®2015 ServiceNow, Inc. All rights reserved.

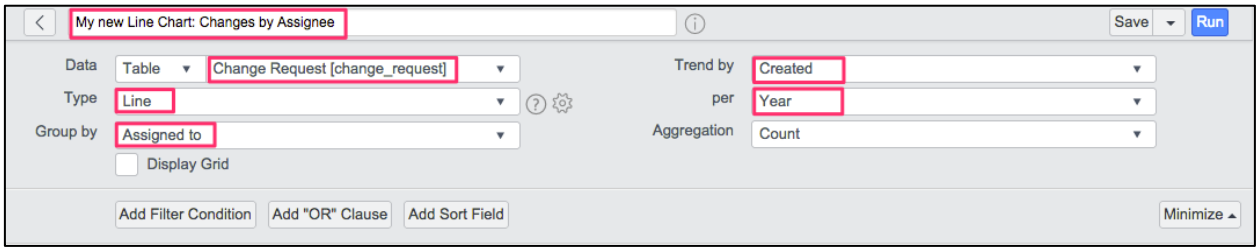
Lab Goal

This lab explains how to create a new Line chart, which highlights trending information. The steps below create a report that shows an annual trend of which resources have been assigned to Change Requests.

Lab 6
Create a New Line Chart

1. Navigate to **Reports > Create New**.
2. Within the **Report Builder**, complete the following:

   Name: **My new Line Chart: Changes by Assignee**
   Table: **Change Request [change_request]**
   Type: **Line**
   Group by: **Assigned to**
   Trend Field: **Created**
   Per: **Year**

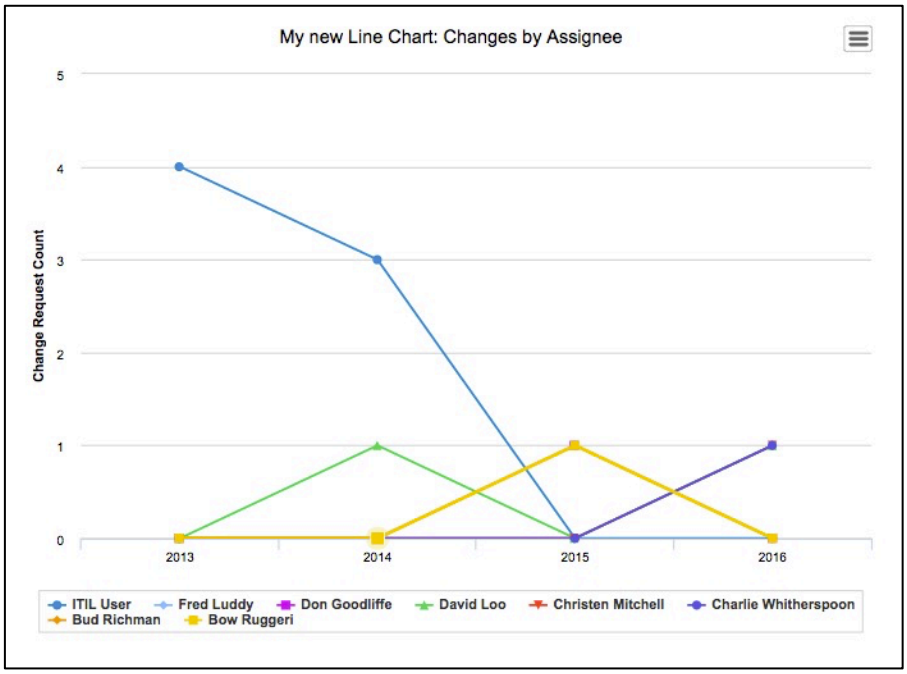


3. **Save** the report.

©2015 ServiceNow, Inc. All rights reserved.

Lab Success Verification

1. The report should look like the example below.



®2015 ServiceNow, Inc. All rights reserved.

Lab Goal

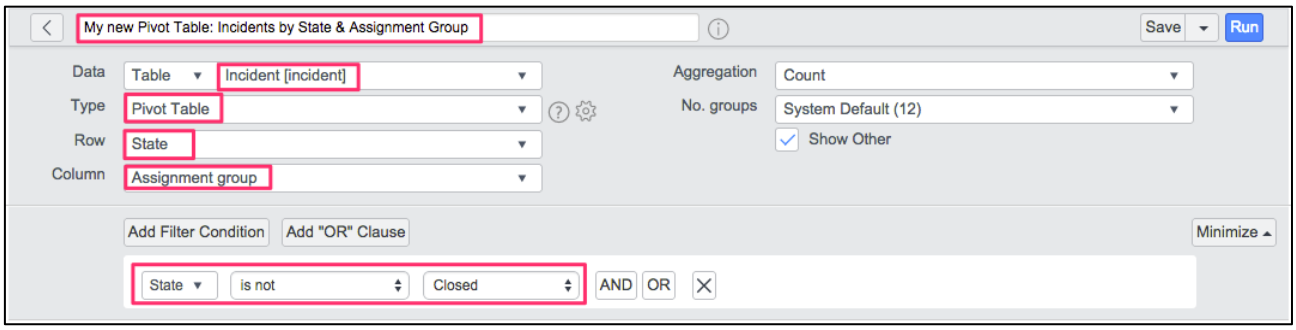
This lab explains how to create a Pivot Table, which enables comparisons of multiple data inputs in a single visualization

Lab 7
Create a Pivot Table

1. Navigate to **Reports > Create New**.

2. Within the **Report Builder**, complete the following:

   Name: **My new Pivot Table: Incidents by State & Assignment Group**
   Table: **Incident [incident]**
   Type: **Pivot Table**
   Row: **State**
   Column: **Assignment group**
   Filter Condition: **State is not Closed**



3. **Save** the report.

©2015 ServiceNow, Inc. All rights reserved.

Lab Success Verification

1. The report should look like the example below.

	Assignment group								
State	Database	Hardware	IT Securities	ITSM Engineering	LDAP Admins	Network	Service Desk	Software	Total
New	17	19	14	20	1	9	39	23	142
Active	23	16	13	16	1	14	21	16	120
Awaiting Problem	0	0	0	0	0	0	1	0	1
Awaiting User Info	2	1	0	0	0	0	1	0	4
Awaiting Evidence	2	1	0	2	0	1	0	1	7
Total	44	37	27	38	2	24	62	40	274

®2015 ServiceNow, Inc. All rights reserved.

Lab Goal

Lab 8 Creating a Pareto Chart

This lab how to use a Pareto Chart to identify the most important factors in a large set of factors. Pareto charts contain both bar and line graphs.

The bars display the data in descending order from left to right, and the line graph shows the cumulative totals from each category in the same order. The left Y-axis is the record count, and the right Y-axis is the cumulative percentage of the total number of records evaluated.

The blue line at the 80% mark helps to determine which data are the most influential in the process.

The data to the left of the intersection of the line graph and the 80% mark have the greatest effect on the overall outcome.

1. Navigate to **Reports > Create New**.

2. Within the **Report Builder**, complete the following:

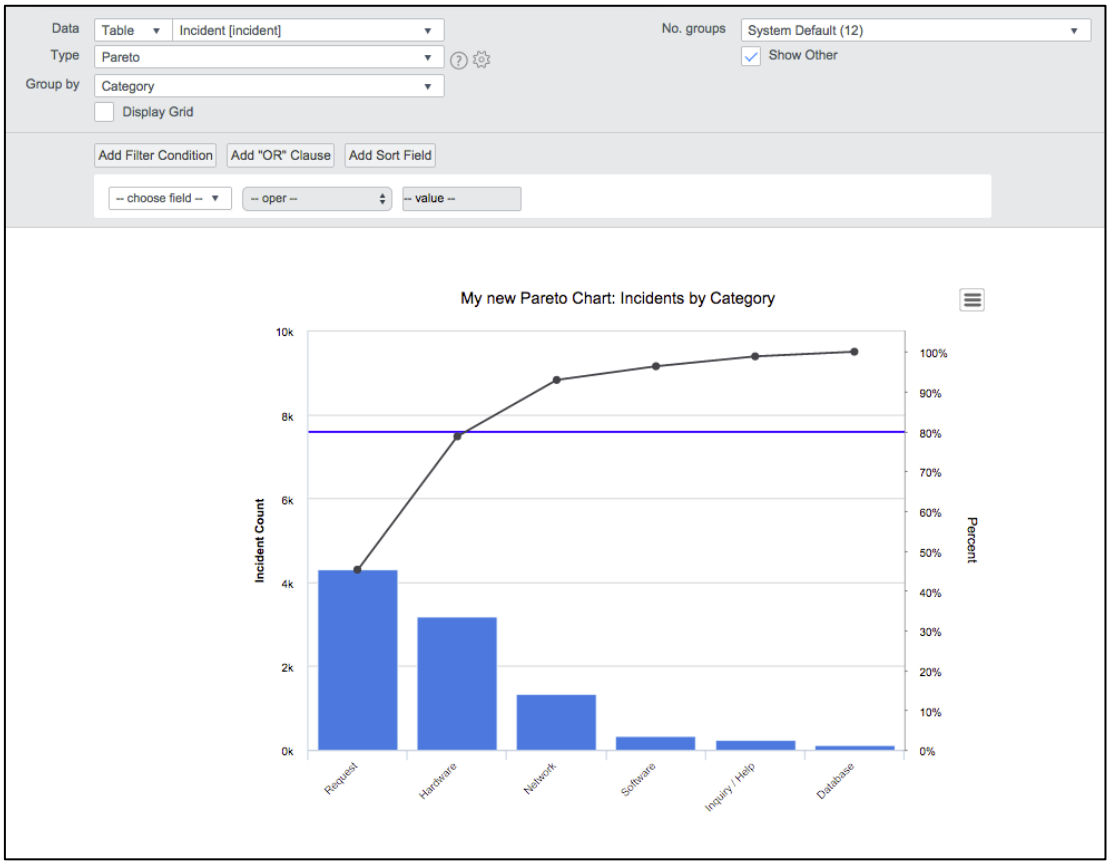
   Name: **My new Pareto Chart: Incidents by Category**
   Data Table: **Incident [incident]**
   Type: **Pareto**
   Group by: **Category**

3. **Save** the report.

®2015 ServiceNow, Inc. All rights reserved.

Lab Success Verification

1. The report should look like the example below.



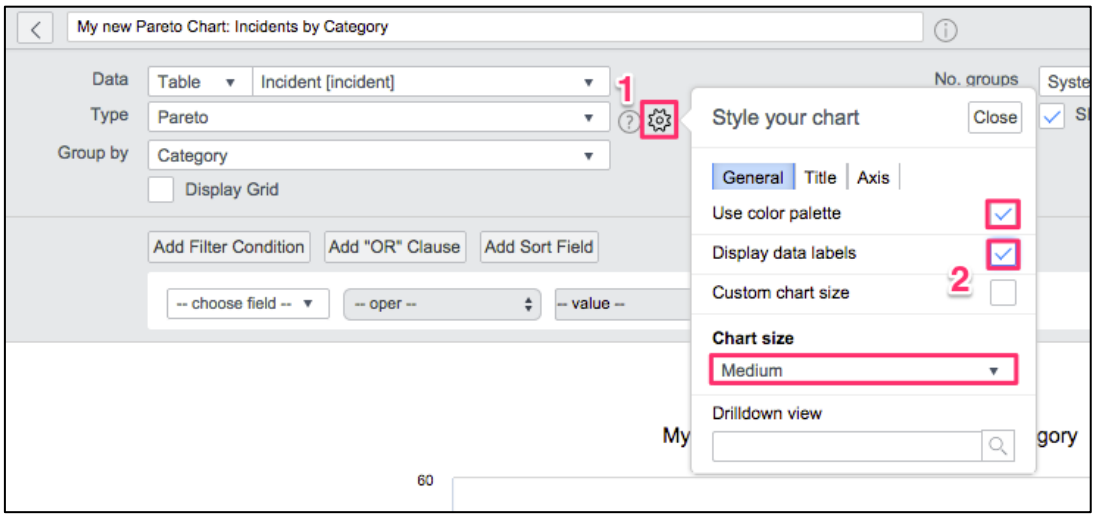
®2015 ServiceNow, Inc. All rights reserved.

Lab Challenge – Explore the chart styling options

Fuji brings with it some new and exciting report formatting options. You can now control the coloring, sizing and styling options of the charts and labels. Note that these styling options will vary depending on the Type of chart you are working with at the time.

1. Click the Gear icon next to the Type selection box. Set the following values on the **General** Tab:

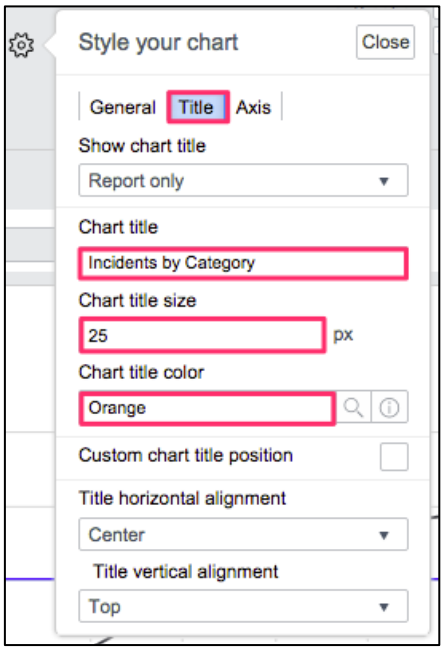
   Use color palette: **checked**
   Display data labels: **checked**
   Chart size: **Medium**



©2015 ServiceNow, Inc. All rights reserved.

2. Click on the **Title** tab within the style window popup and set the following values:

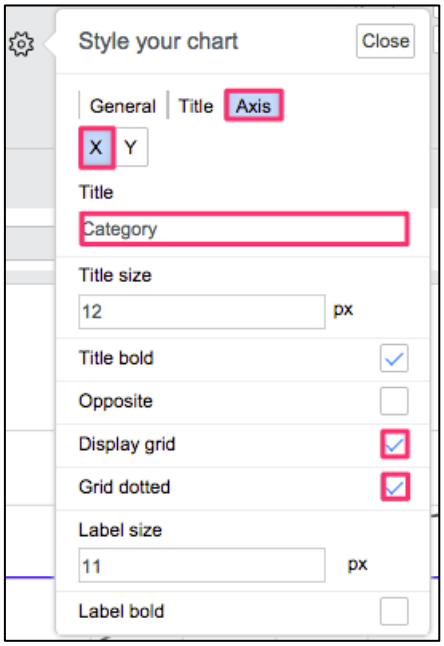
   Chart title: **Incidents by Category**
   Chart title Size: **25**
   Chart title color: **Orange**



©2015 ServiceNow, Inc. All rights reserved.

3. Click on the **Title** tab within the style window popup and also on the X (axis) tab and set the following values:

   Title: **Category**
   Display grid: **checked**
   Grid dotted: **checked**

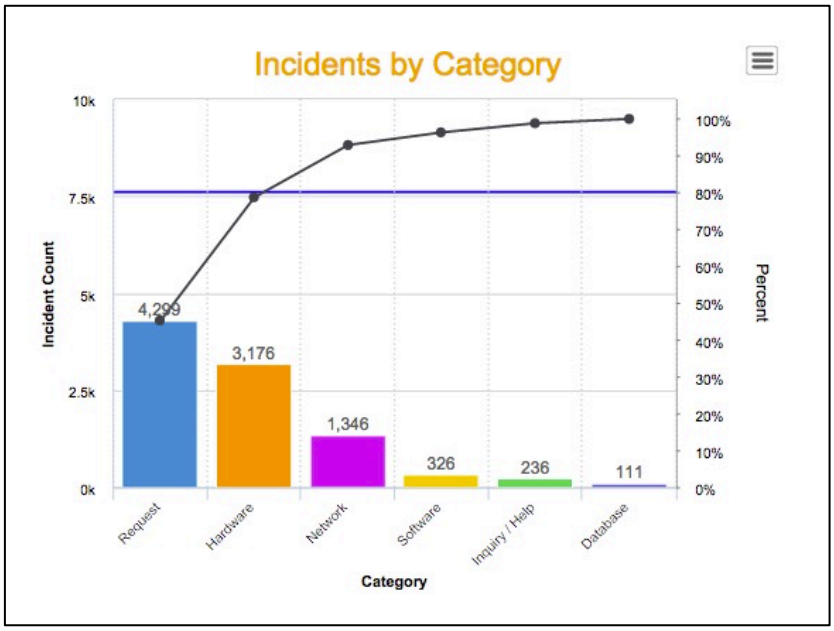


4. Click the **Close** button on the style window popup style, then click the **Save** button.

©2015 ServiceNow, Inc. All rights reserved.

Lab Challenge Success Verification

1. The report should now look like the example below.



®2015 ServiceNow, Inc. All rights reserved.

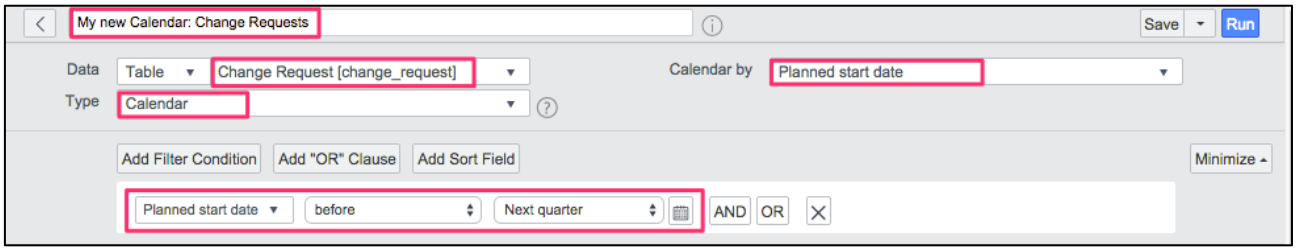
Lab Goal

Calendars help with planning and scheduling. This lab explains how to create Change calendars to filter and highlight potential impact and risks to an organization. A calendar clarifies change request information over time better than a report or chart.

Lab 9
Creating a Change Calendar

1. Navigate to **Reports > Create New**.
2. Within the **Report Builder**, complete the following:

   Name: **My new Calendar: Change Requests**
   Table: **Change Request [change_request]**
   Type: **Calendar**
   Calendar Field: **Planned start date**
   Add Filter: **Planned Start Date before Next Quarter**

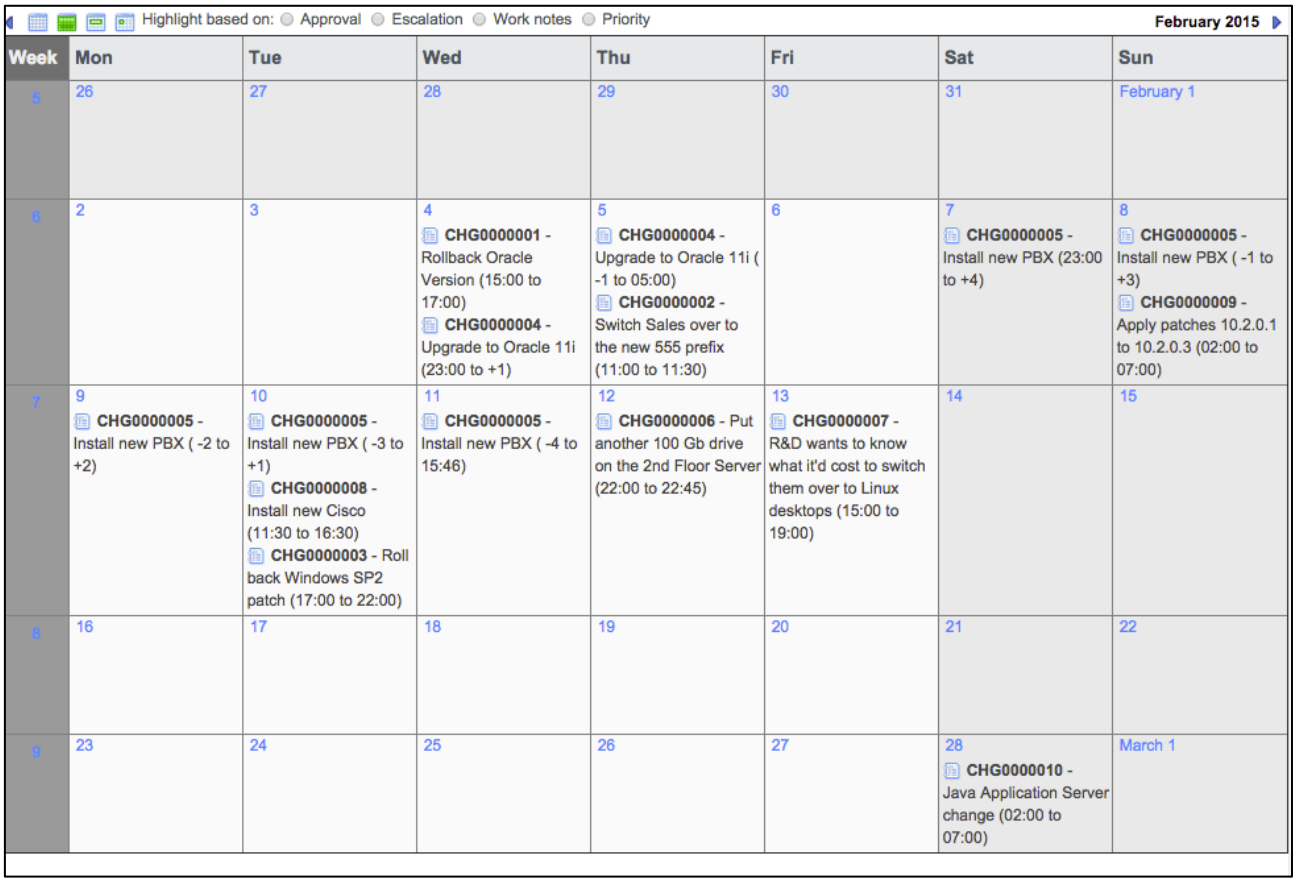


3. **Save** the report.

©2015 ServiceNow, Inc. All rights reserved.

Lab Success Verification

1. The report should look like the example below.



Highlight based on: Approval Escalation Work notes Priority — February 2015

Week	Mon	Tue	Wed	Thu	Fri	Sat	Sun
5	26	27	28	29	30	31	February 1
6	2	3	4 **CHG0000001** - Rollback Oracle Version (15:00 to 17:00) **CHG0000004** - Upgrade to Oracle 11i (23:00 to +1)	5 **CHG0000004** - Upgrade to Oracle 11i (-1 to 05:00) **CHG0000002** - Switch Sales over to the new 555 prefix (11:00 to 11:30)	6	7 **CHG0000005** - Install new PBX (23:00 to +4)	8 **CHG0000005** - Install new PBX (-1 to +3) **CHG0000009** - Apply patches 10.2.0.1 to 10.2.0.3 (02:00 to 07:00)
7	9 **CHG0000005** - Install new PBX (-2 to +2)	10 **CHG0000005** - Install new PBX (-3 to +1) **CHG0000008** - Install new Cisco (11:30 to 16:30) **CHG0000003** - Roll back Windows SP2 patch (17:00 to 22:00)	11 **CHG0000005** - Install new PBX (-4 to 15:46)	12 **CHG0000006** - Put another 100 Gb drive on the 2nd Floor Server (22:00 to 22:45)	13 **CHG0000007** - R&D wants to know what it'd cost to switch them over to Linux desktops (15:00 to 19:00)	14	15
8	16	17	18	19	20	21	22
9	23	24	25	26	27	28 **CHG0000010** - Java Application Server change (02:00 to 07:00)	March 1

®2015 ServiceNow, Inc. All rights reserved.

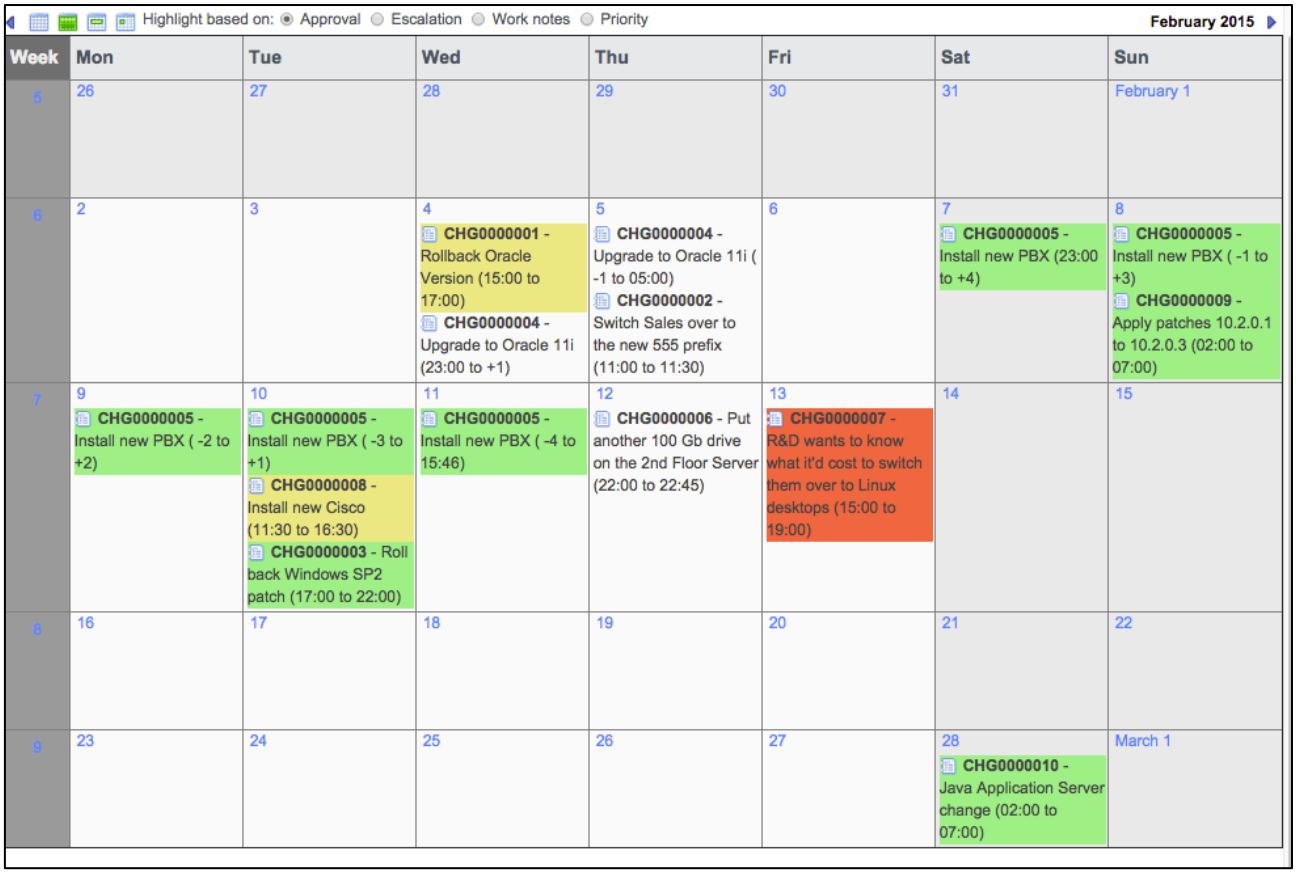
Lab Challenge – Add Some Color to the Calendar

Colors can be applied to Calendars based on a number of field values, including Approval State, Escalation, Work Notes & Priority.

1. Select the **Approval** option at the top of the Calendar report.

Lab Challenge Success Verification

1. The report should look similar to the example below.



NOTE: Try the other options for Escalation, Work Notes and Priority to see how you can change the look and impact of the report.

©2015 ServiceNow, Inc. All rights reserved.

Lab Goal

This lab explains how to create a Trend Chart, which is useful for showing how the value of one or more items changes over time. Values along the horizontal axis of the trend chart represent the time measurement. Values on the vertical axis represent the changes to the items being monitored.

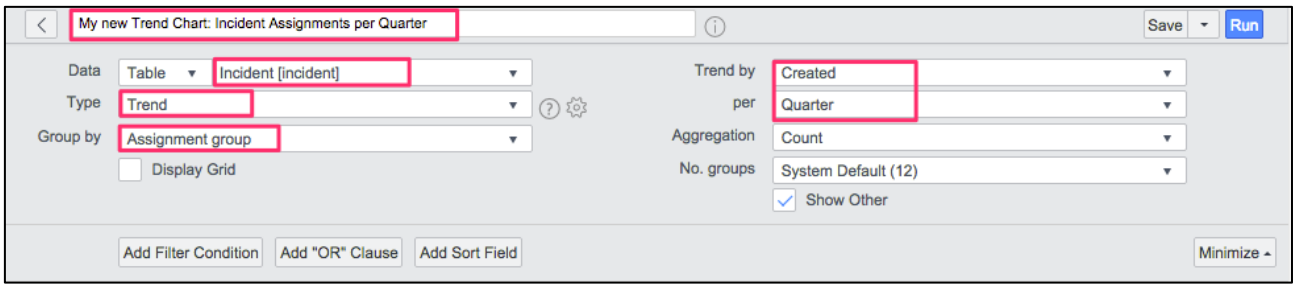
The lab example creates a Trend Chart for the number and type of Change Approvals on a monthly basis.

Lab 10 Creating a Trend Chart

1. Navigate to **Reports > Create New**.

2. Within the **Report Builder**, complete the following:

   Name: **My new Trend Chart: Incident Assignments per Quarter**
   Table: **Incident [incident]**
   Type: **Trend**
   Group by: **Assignment group**
   Trend Field: **Created**
   Per: **Quarter**

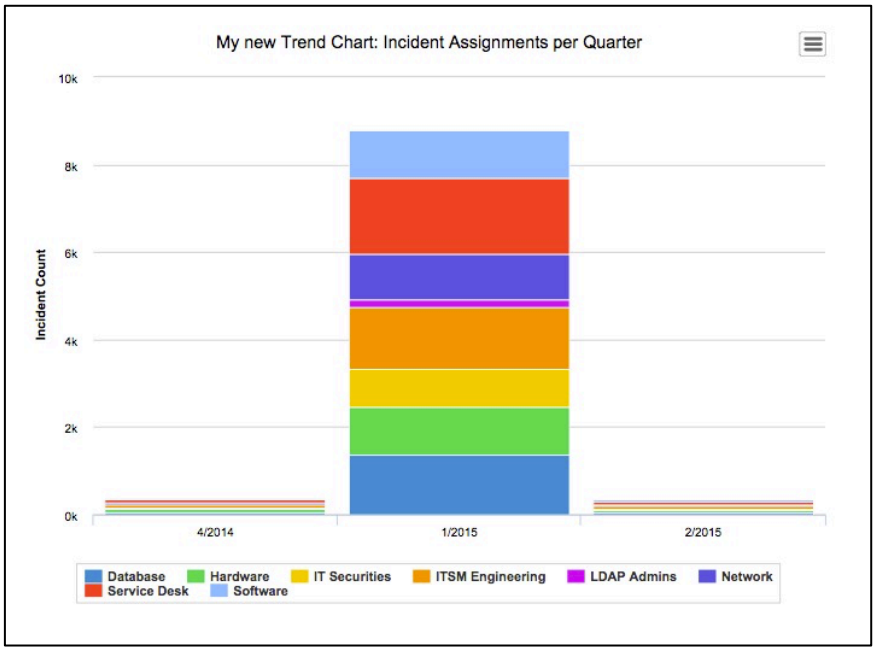


3. **Save** the report.

©2015 ServiceNow, Inc. All rights reserved.

Lab Success Verification

1. The report should look like the example below.



©2015 ServiceNow, Inc. All rights reserved.

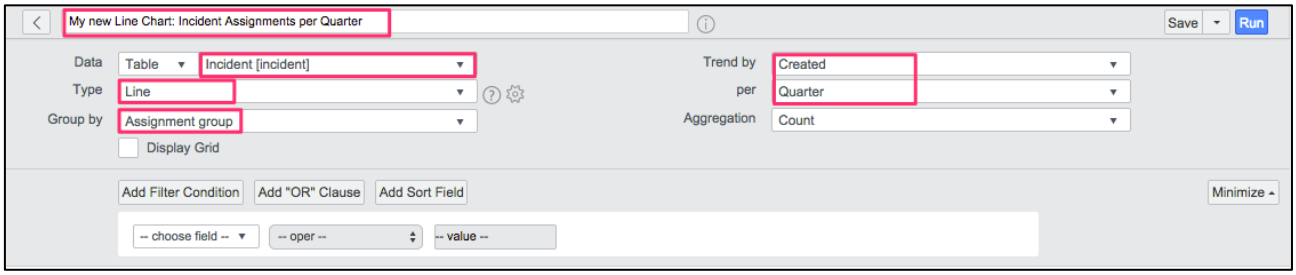
Lab Challenge – Trending with other report types

Trending information over time can also be accomplished without the use of the specific Trend report type. The Lab explores how to use a Line Chart for trending purposes.

1. Navigate to **Reports > Create New**.

2. Within the **Report Builder**, complete the following:

   Name: **My new Line Chart: Trend Incidents by Create Date**
   Table: **Incident [incident]**
   Type: **Line**
   Group by: **Assignment Group**
   Trend By: **Created**
   Per: **Quarter**

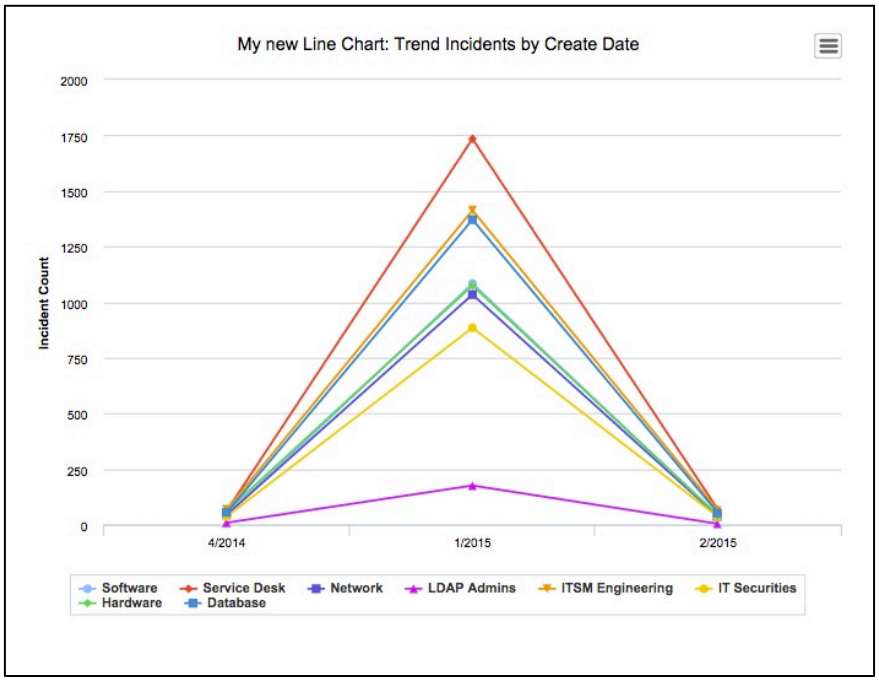


3. **Save** the report.

©2015 ServiceNow, Inc. All rights reserved.

Lab Challenge Success Validation

1. The report should look like the example below.



NOTE: Notice that this report presents the information in a very similar way to the Trend report that we produced earlier in this Lab. Next we will explore an alternative way of trending data against a time line that is not so linear.

©2015 ServiceNow, Inc. All rights reserved.

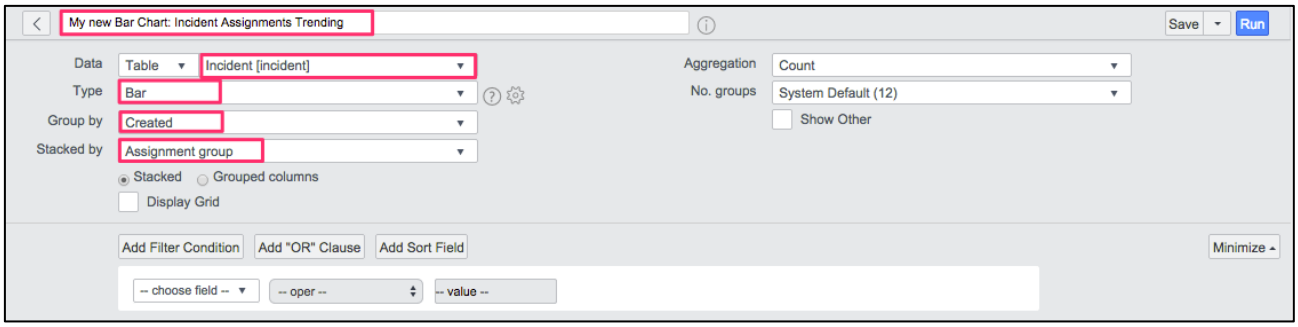
Lab Challenge 2 – Trending with non-linear dates

Next we will explore the use of trending with the standard bar chart report, by the use of a date field in the Group By field. The time line that is used for this is controlled by something called a Report Range, which we will explain in this Lab Challenge.

1. Navigate to **Reports > Create New**.

2. Within the **Report Builder**, complete the following:

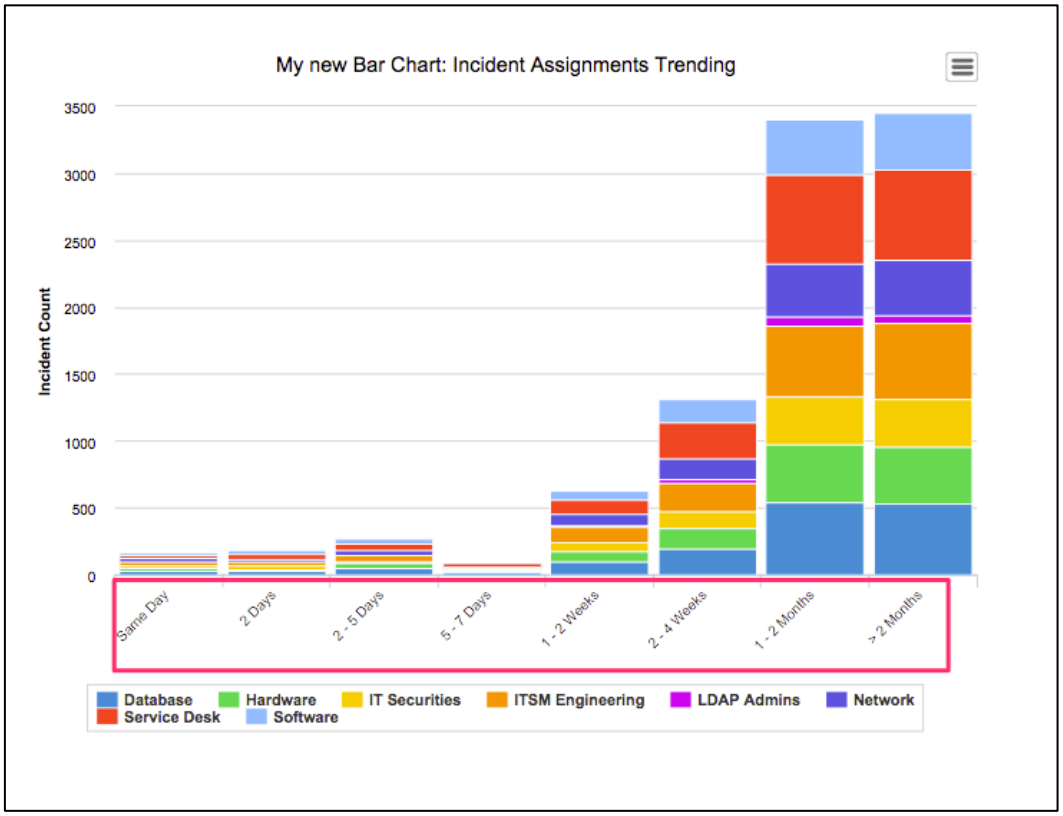
   Name: **My new Bar Chart: Incident Assignment Trending**
   Table: **Incident [incident]**
   Type: **Bar**
   Group by: **Created**
   Stacked Field: **Assignment Group**



©2015 ServiceNow, Inc. All rights reserved.

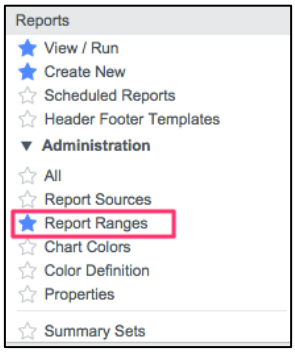
3. **Save** the report.

   Validate that the report looks like the example shown below, and notice the x-axis and the way that the time line is presented.

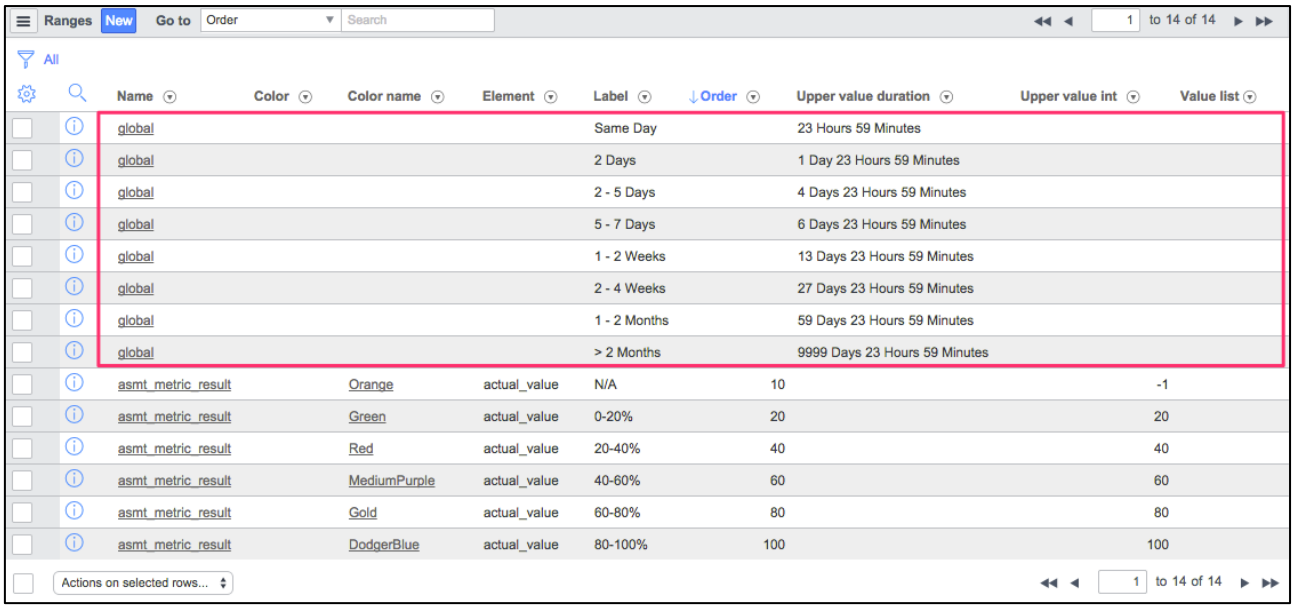


®2015 ServiceNow, Inc. All rights reserved.

4. Click on **Reports > Administration > Report Ranges**.



NOTE: Notice that the x-axis labels match the Label column in the Report Ranges table. This table can be used to control the ranges and groupings of the data that is bundled together in this non-linear time range. We wont explore this in any more detail in this 101 Lab, however if you want to explore the use of these further, please consult the ServiceNow wiki at http://wiki.servicenow.com/index.php?title=Report_Ranges



Name	Color	Color name	Element	Label	Order	Upper value duration	Upper value int	Value list
global				Same Day		23 Hours 59 Minutes		
global				2 Days		1 Day 23 Hours 59 Minutes		
global				2 - 5 Days		4 Days 23 Hours 59 Minutes		
global				5 - 7 Days		6 Days 23 Hours 59 Minutes		
global				1 - 2 Weeks		13 Days 23 Hours 59 Minutes		
global				2 - 4 Weeks		27 Days 23 Hours 59 Minutes		
global				1 - 2 Months		59 Days 23 Hours 59 Minutes		
global				> 2 Months		9999 Days 23 Hours 59 Minutes		
asmt_metric_result		Orange	actual_value	N/A	10		-1	
asmt_metric_result		Green	actual_value	0-20%	20		20	
asmt_metric_result		Red	actual_value	20-40%	40		40	
asmt_metric_result		MediumPurple	actual_value	40-60%	60		60	
asmt_metric_result		Gold	actual_value	60-80%	80		80	
asmt_metric_result		DodgerBlue	actual_value	80-100%	100		100	

Actions on selected rows... 1 to 14 of 14

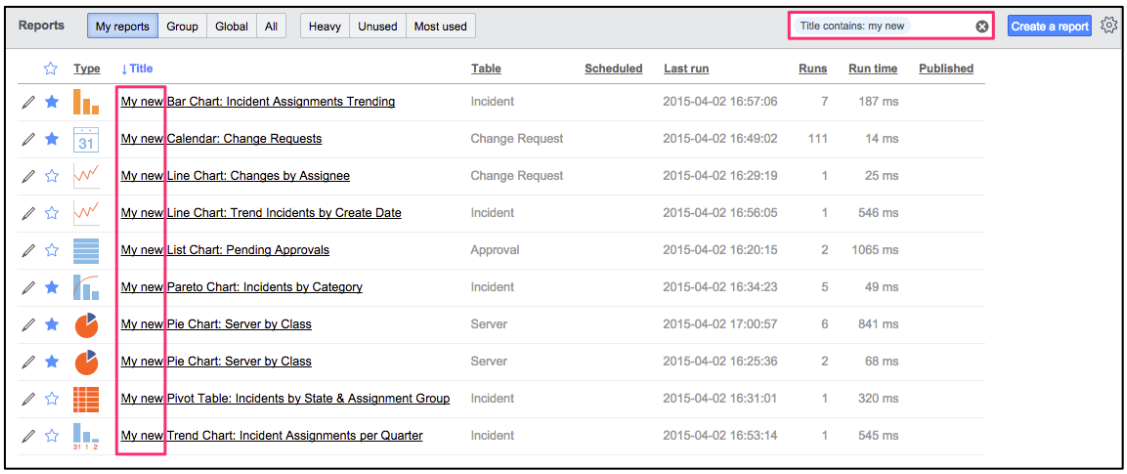
®2015 ServiceNow, Inc. All rights reserved.

Lab Goal

Creating a report as a gauge makes it possible to add that report to a homepage. (NOTE: You need the gauge_maker role in order to do this.) This lab explains how to create a gauge from some of the reports that you have already created in this session.

Lab 11
Creating a Dashboard from Reports

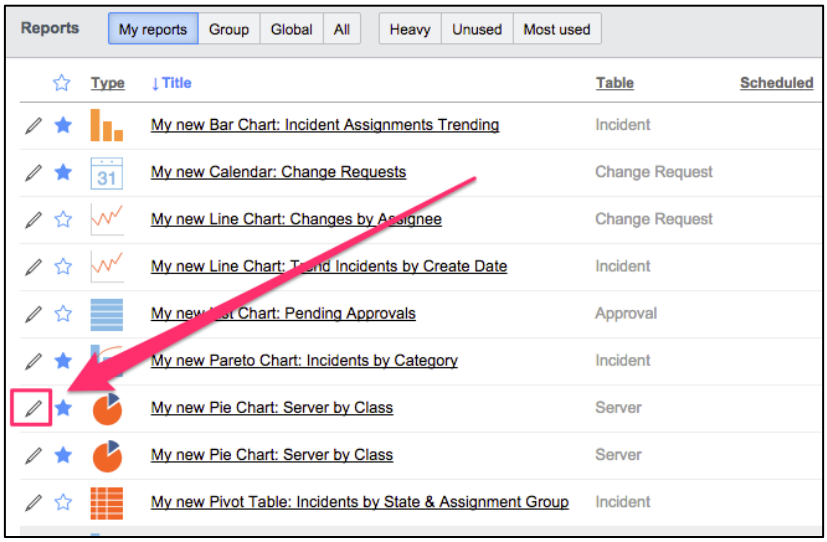
1. Navigate to **Reports > View/Run**.
2. Search for all reports that start with **My new**.



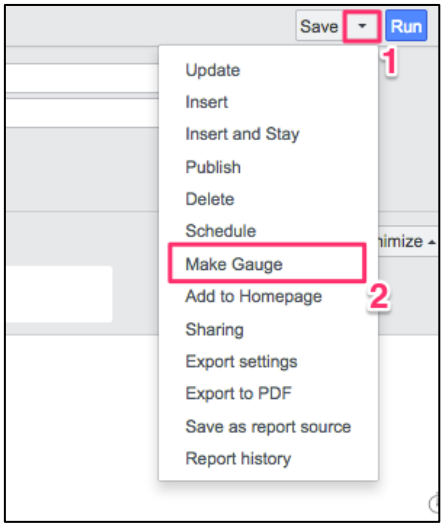
Type	Title	Table	Scheduled	Last run	Runs	Run time	Published
	My new Bar Chart: Incident Assignments Trending	Incident		2015-04-02 16:57:06	7	187 ms	
	My new Calendar: Change Requests	Change Request		2015-04-02 16:49:02	111	14 ms	
	My new Line Chart: Changes by Assignee	Change Request		2015-04-02 16:29:19	1	25 ms	
	My new Line Chart: Trend Incidents by Create Date	Incident		2015-04-02 16:56:05	1	546 ms	
	My new List Chart: Pending Approvals	Approval		2015-04-02 16:20:15	2	1065 ms	
	My new Pareto Chart: Incidents by Category	Incident		2015-04-02 16:34:23	5	49 ms	
	My new Pie Chart: Server by Class	Server		2015-04-02 17:00:57	6	841 ms	
	My new Pie Chart: Server by Class	Server		2015-04-02 16:25:36	2	68 ms	
	My new Pivot Table: Incidents by State & Assignment Group	Incident		2015-04-02 16:31:01	1	320 ms	
	My new Trend Chart: Incident Assignments per Quarter	Incident		2015-04-02 16:53:14	1	545 ms	

©2015 ServiceNow, Inc. All rights reserved.

3. Click the **Edit** icon for the report called **My new Pie Chart: Server by Class**.



4. Click on the **dropdown arrow** next to the Save button, and select **Make Gauge**.

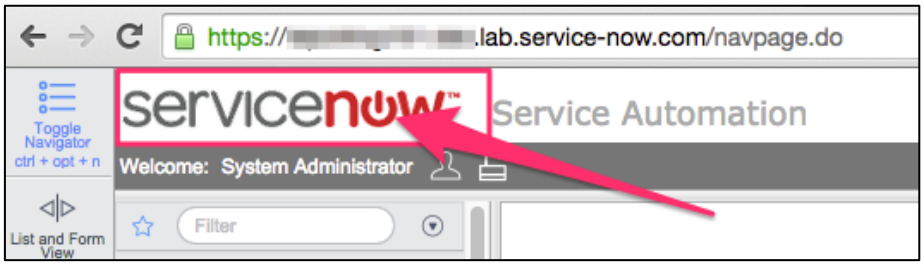


5. Repeat for process the following reports:

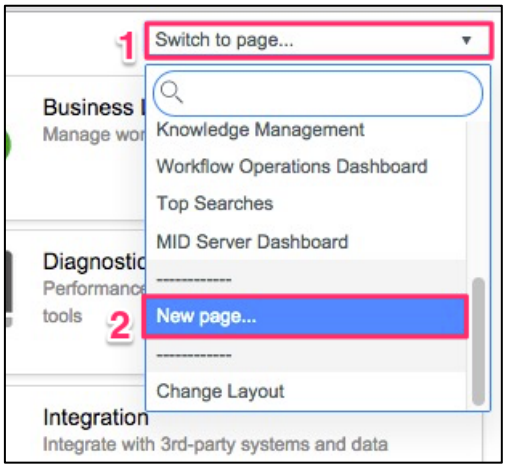
   My new Pivot Table: Incidents by State & Assignment Group
   My new Pareto Chart: Incidents by Category

©2015 ServiceNow, Inc. All rights reserved.

6. Click on the **ServiceNow Logo** in the top left of your browser screen. This will open up the default homepage dashboard.



7. On the right hand side of the dashboard that is displayed, click the dropdown field labeled **Switch to page…** and scroll down to the entry labeled **New Page…**



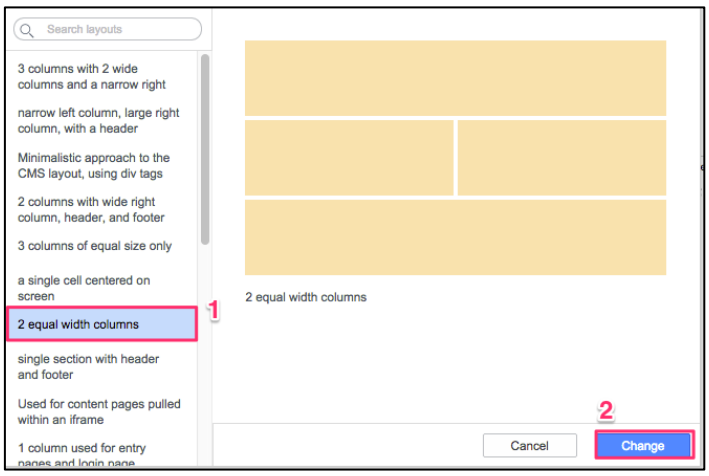
NOTE: A blank Dashboard page will be displayed from which we can now add some content. Firstly though, we will define the layout structure that will be used to contain the content.

©2015 ServiceNow, Inc. All rights reserved.

8. On the right hand side of the blank dashboard that is displayed, click the dropdown field labeled **Switch to page…** again, and scroll down to the entry labeled **Change Layout…**



9. Select the **2 equal width columns** layout and click **Change**. This will apply the depicted layout and drop-zones to your dashboard.

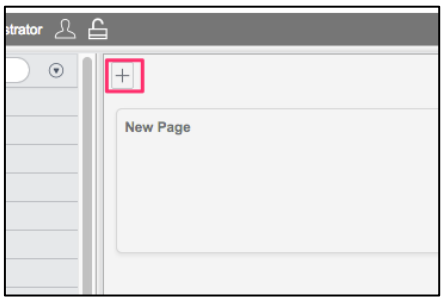


10. Click on the dashboard title and replace it with **My new Dashboard**.



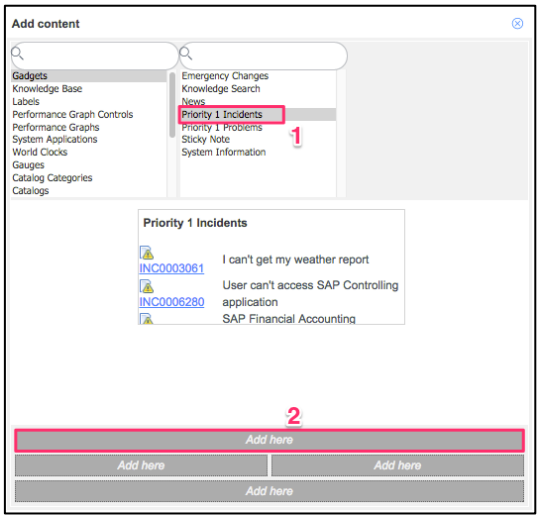
©2015 ServiceNow, Inc. All rights reserved.

11. Click on the **plus sign** in the top left of the dashboard.



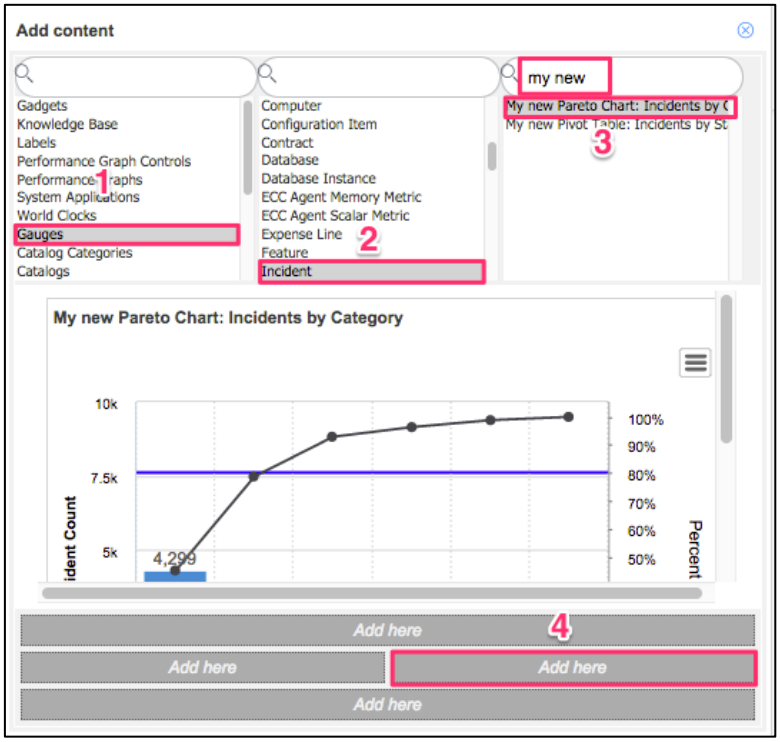
12. Select the **Priority 1 Incidents** item in the 2nd column, and then click the **Add here** link in the top box of the layout.

    NOTE: The layout at the bottom of the add content represents the new layout that we selected previously. Every time you click on the Add here link, it will add the content from the content browser to that section of the dashboard you are building.



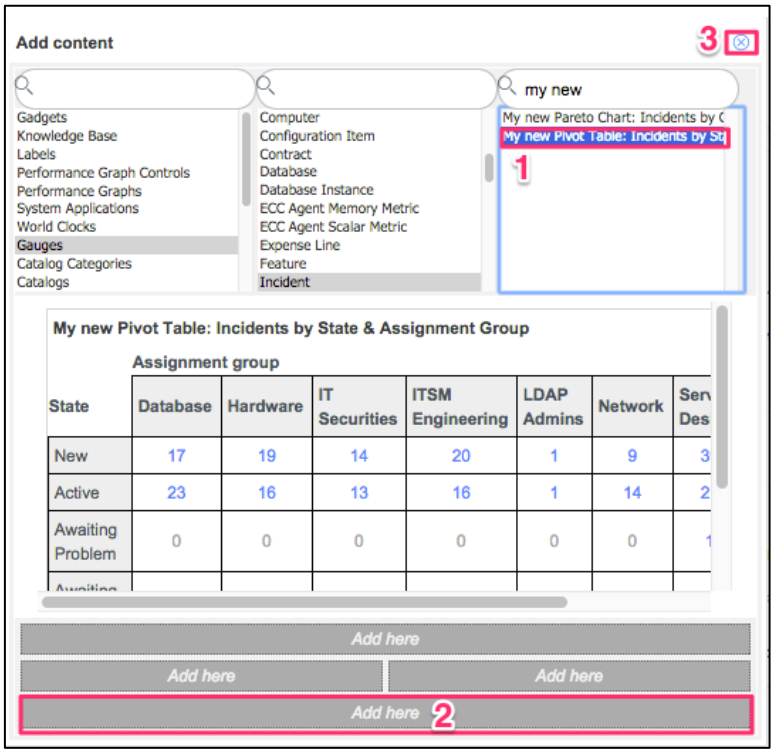
©2015 ServiceNow, Inc. All rights reserved.

13. Next, select the **Gauges > Incident** then select the **My new Pareto Chart: Incidents by Category** gauge, then click the **Add here** button indicated in the example screenshot. You can use the filter in the 3rd column to find the correct gauge.



©2015 ServiceNow, Inc. All rights reserved.

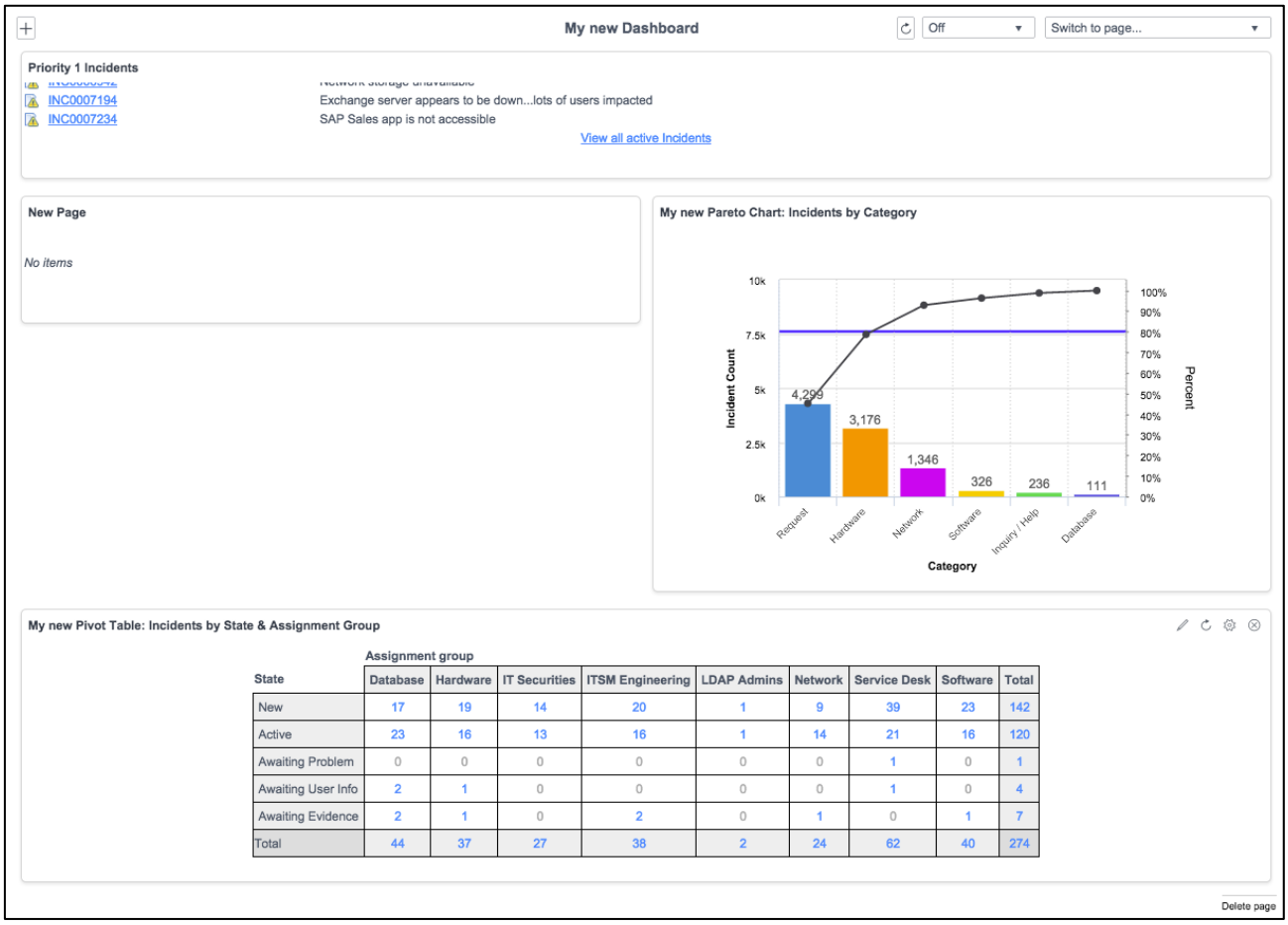
14. Select the next gauge **My new Pivot Table: Incidents by State & Assignment Group** and then click **Add here** in the bottom dropzone. Then click the **Close** button in the top right corner.



©2015 ServiceNow, Inc. All rights reserved.

Lab Success Verification

1. The Dashboard should look like the example below.

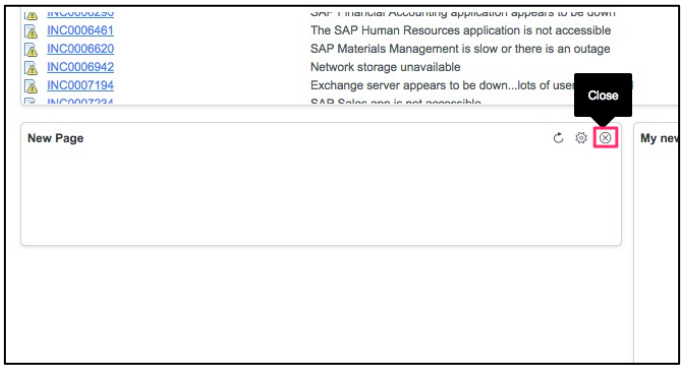


State	Database	Hardware	IT Securities	ITSM Engineering	LDAP Admins	Network	Service Desk	Software	Total
New	17	19	14	20	1	9	39	23	142
Active	23	16	13	16	1	14	21	16	120
Awaiting Problem	0	0	0	0	0	0	1	0	1
Awaiting User Info	2	1	0	0	0	0	1	0	4
Awaiting Evidence	2	1	0	2	0	1	0	1	7
Total	44	37	27	38	2	24	62	40	274

©2015 ServiceNow, Inc. All rights reserved.

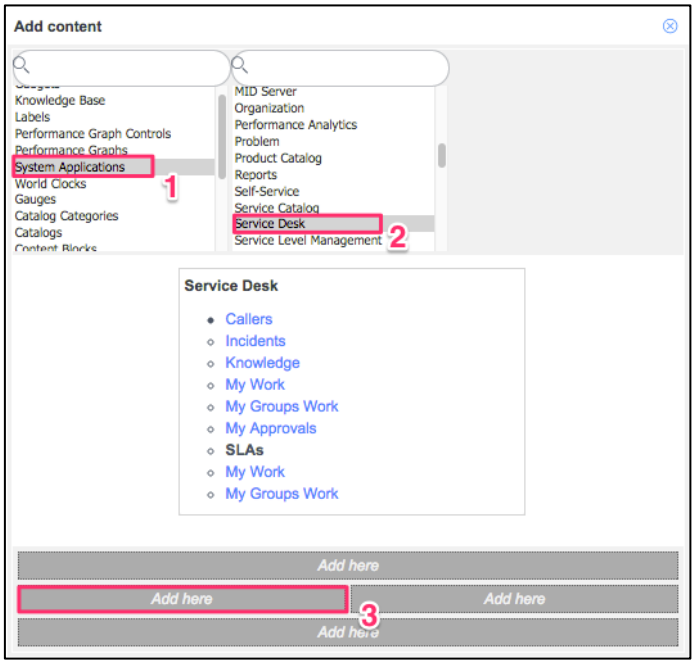
Lab Challenge – Adding additional content types to the dashboard

1. Remove the **New Page** placeholder gauge by clicking over the **Close** button in the top right.



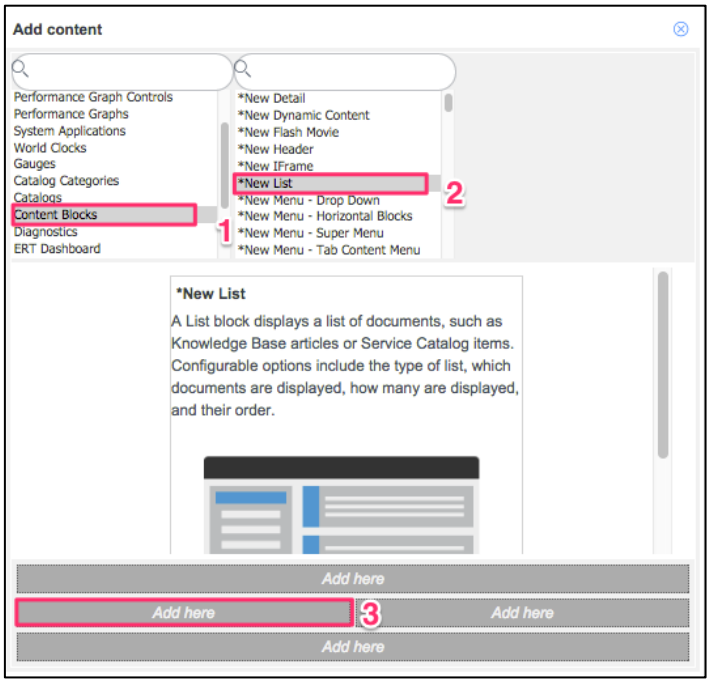
2. Click the **Plus** button in the top left of the dashboard, to add new content again.

3. Select **System Applications > Service Desk** and click **Add here**.

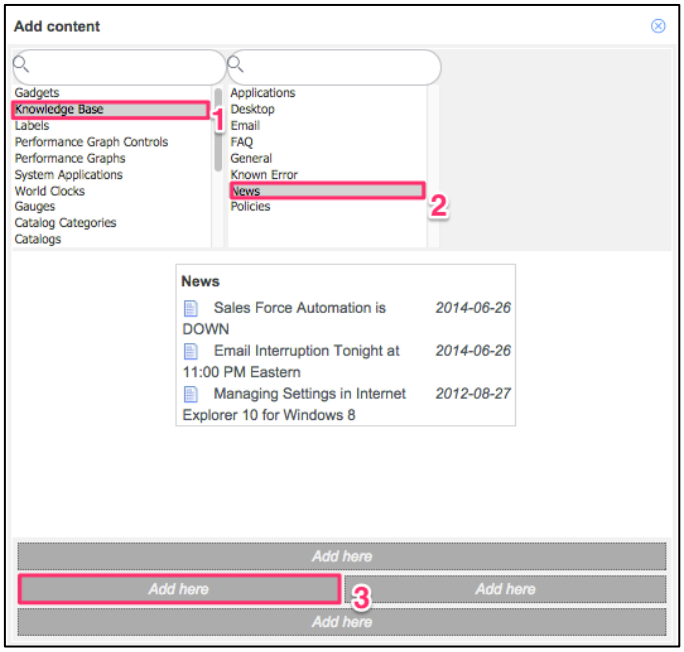


®2015 ServiceNow, Inc. All rights reserved.

4. Select **Content Blocks > *New List** and click **Add here**.

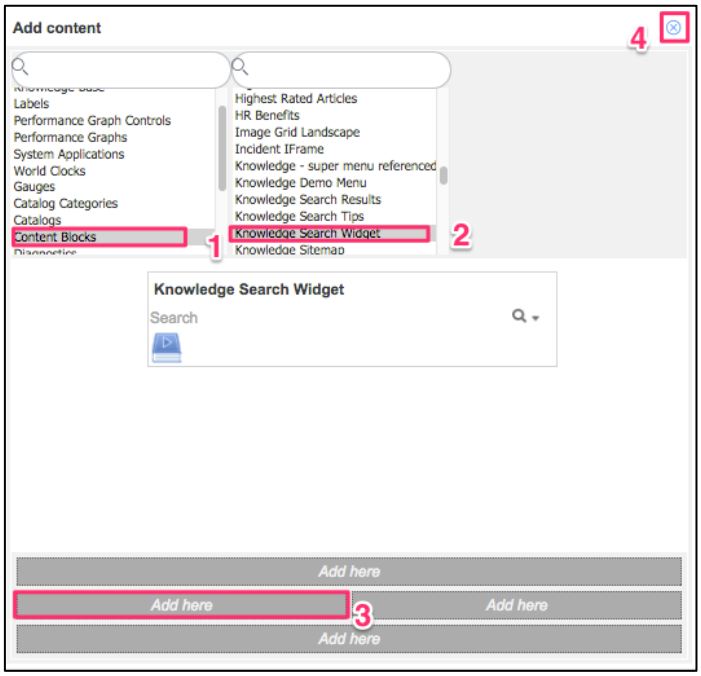


5. Select **Knowledge Base > News** then click **Add here**.



®2015 ServiceNow, Inc. All rights reserved.

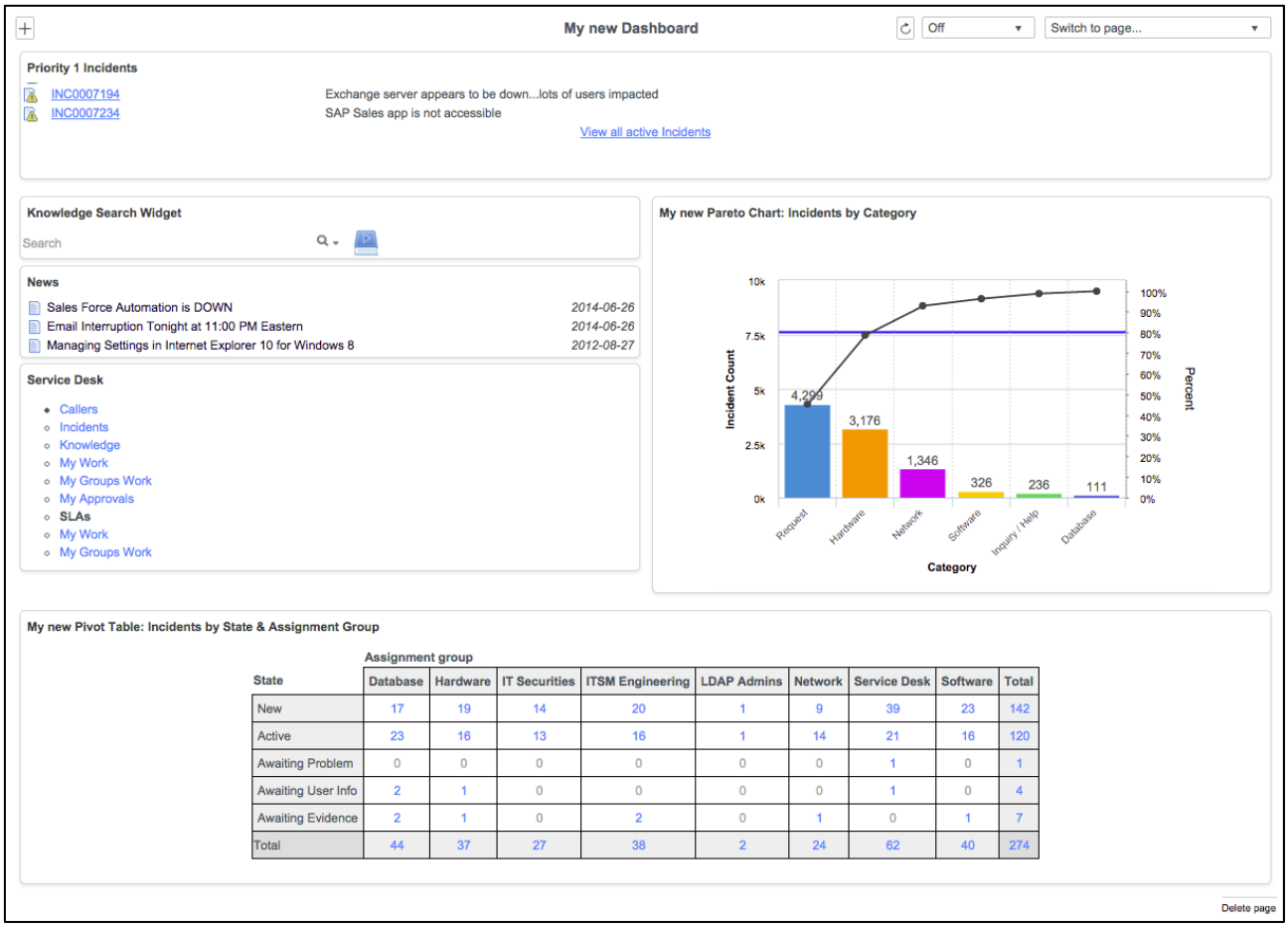
6. Select **Content Blocks > Knowledge Search Widget** then click **Add here**, and then click the **Close** icon to return to the dashboard.



®2015 ServiceNow, Inc. All rights reserved.

Lab Challenge Success Verification

1. The dashboard should look like the example below.



State	Database	Hardware	IT Securities	ITSM Engineering	LDAP Admins	Network	Service Desk	Software	Total
New	17	19	14	20	1	9	39	23	142
Active	23	16	13	16	1	14	21	16	120
Awaiting Problem	0	0	0	0	0	0	1	0	1
Awaiting User Info	2	1	0	0	0	0	1	0	4
Awaiting Evidence	2	1	0	2	0	1	0	1	7
Total	44	37	27	38	2	24	62	40	274

Congratulations, you have configured your first dashboard.

NOTE: This is a personal dashboard visible to you only. In order to publish or share a dashboard, the Page record will need to be updated in the **Homepage Admin > Pages** section of the system, and will require the User field to be cleared and for the read roles and write roles to be defined. This is beyond the scope of this Lab however, but can be explored further via the wiki at: http://wiki.servicenow.com/index.php?title=Homepage_Administration.

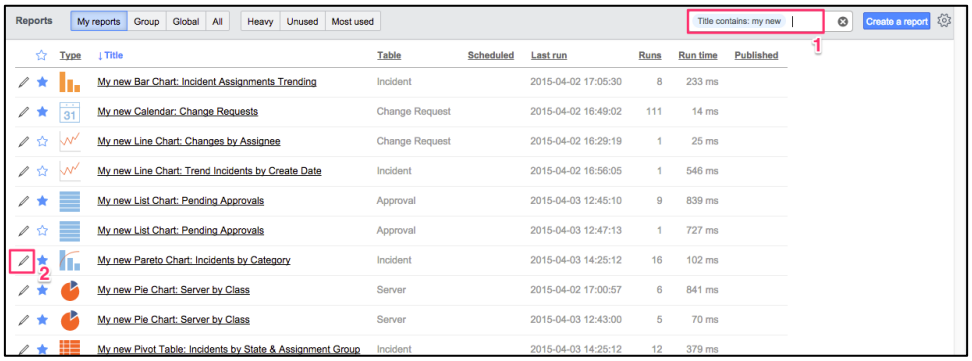
©2015 ServiceNow, Inc. All rights reserved.

Lab Goal

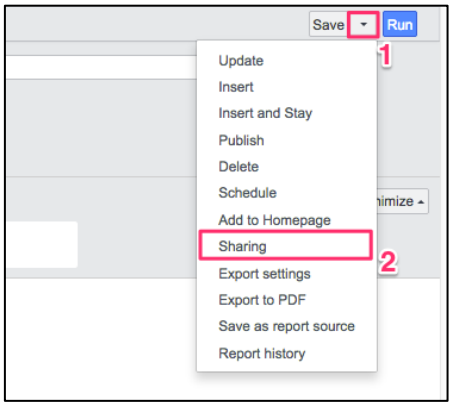
This lab explains how to share reports with others in an organization, which broadens the use of the created reports.

Lab 12 Sharing Reports with Security

1. Navigate to Adding additional content types to the dashboard.
2. Select **Edit** for the report: **My new Pareto Chart: Incidents by Category**.



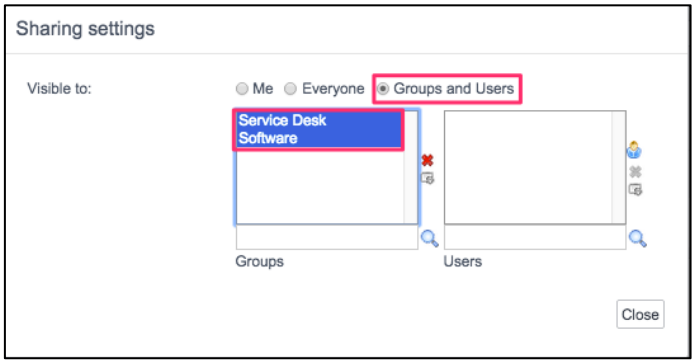
3. Click the **down arrow** next to the Save button, and select the **Sharing** option.



®2015 ServiceNow, Inc. All rights reserved.

4. Select the Groups and Users option, then add the following groups to the report:

   Service Desk
   Software



5. Close the popup dialog then Save the report.

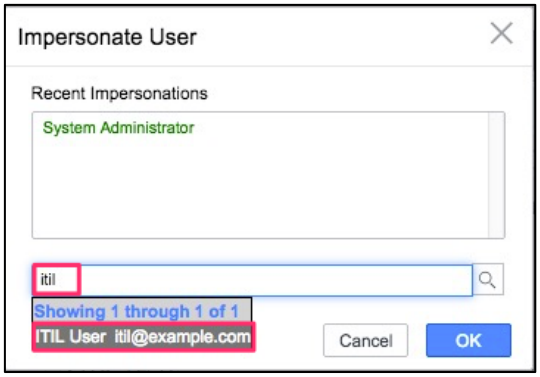
Lab Success Verification

1. In order to verify that the report has been shared, impersonate a member of the Service Desk team.

2. Click on the impersonate icon next to the logged in user name.

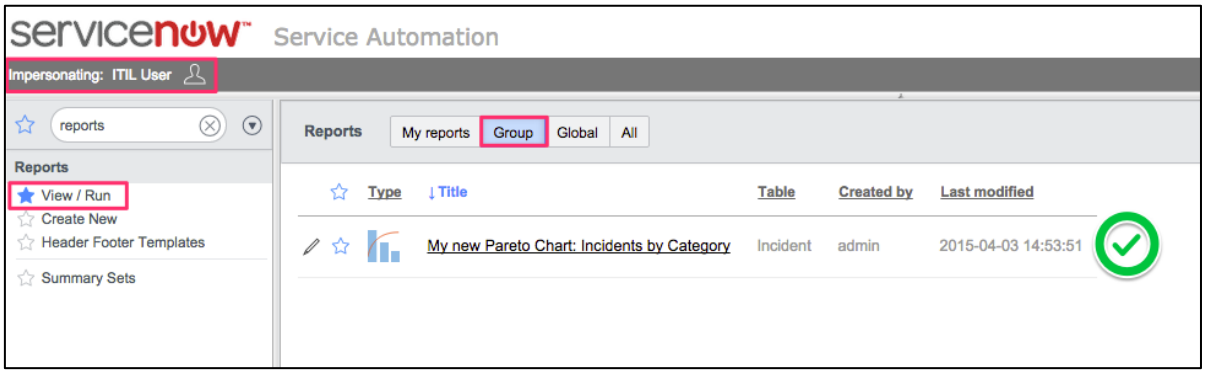


3. Enter **itil** into the reference field at the bottom of the Impersonate User window and select the **ITIL User**, then click **OK**.



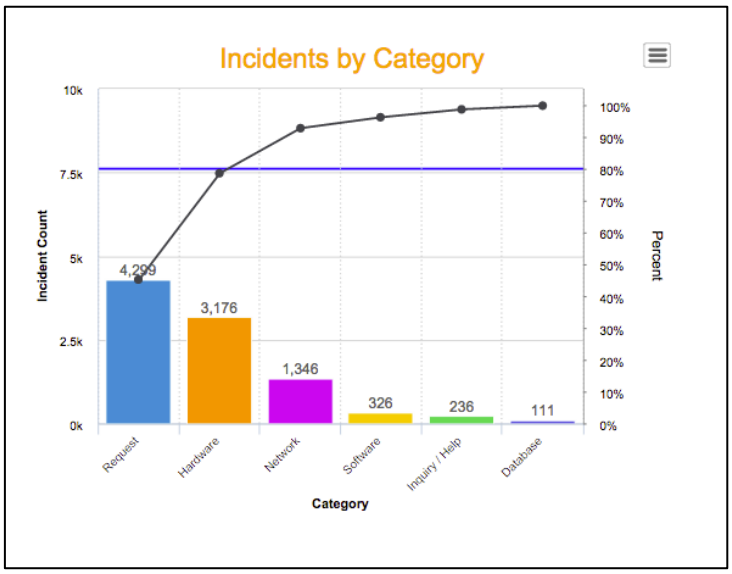
©2015 ServiceNow, Inc. All rights reserved.

4. While impersonating ITIL User, navigate to **Reports > View/Run**. Then click the Group button to access reports shared with any of ITIL Users groups.



5. Click on the shared report title **My new Pareto Chart: Incidents by Category**

6. The shared report should look like the example below.



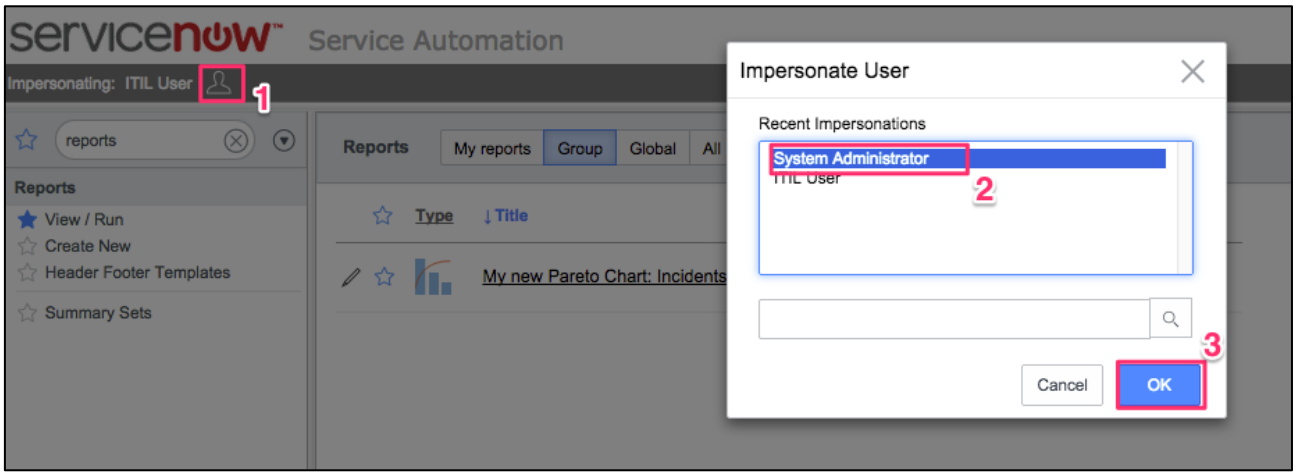
©2015 ServiceNow, Inc. All rights reserved.

Lab Goal

This lab explains how to share reports with others outside an organization.

Lab 13 Publishing Reports to a Public URL

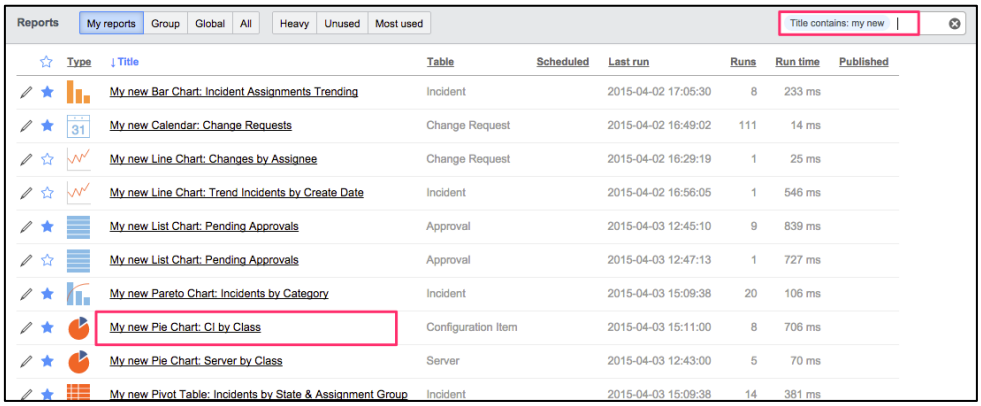
NOTE: Before starting this lab, be sure to discontinue impersonating the ITIL user. You can revert back using the same approach as before.



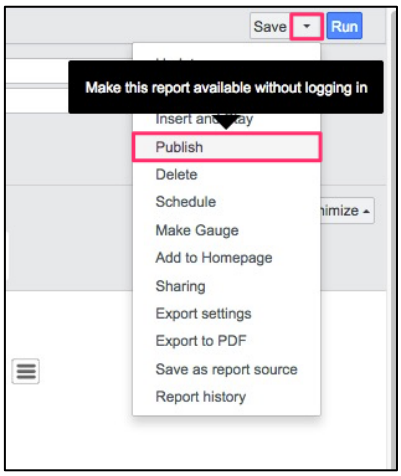
©2015 ServiceNow, Inc. All rights reserved.

1. Navigate to **Reports > View/Run**.

2. Click on the title of the report: **My new Pie Chart: CI by Class**.



3. Within the **Report Builder**, click the **down arrow** next to the Save button and select the Publish option.



4. A confirmation prompt with a URL appears, confirming that the report has been published.



®2015 ServiceNow, Inc. All rights reserved.

Lab Success Verification

In order to verify that the report is now available on the Internet, follow the steps below.

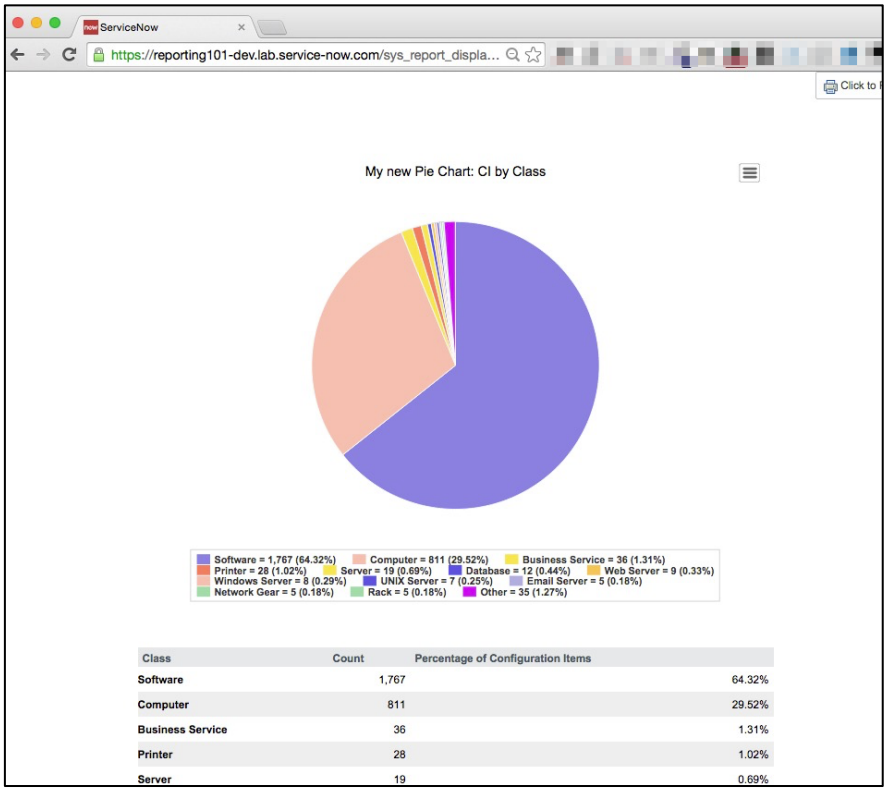
1. Copy the URL that appears in the confirmation prompt.



2. Paste it into the address bar in a new web browser.



3. The published report should now be available, without requiring any login credentials.



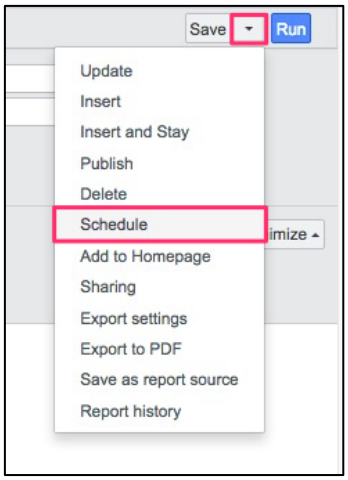
©2015 ServiceNow, Inc. All rights reserved.

Lab Goal

This lab explains how to create a scheduled distribution for a report. ServiceNow can schedule reports to be distributed to various audiences based on desired schedules. Scheduled report distribution eliminates the time-consuming need to create and distribute reports manually.

Lab 14
Scheduling a Report

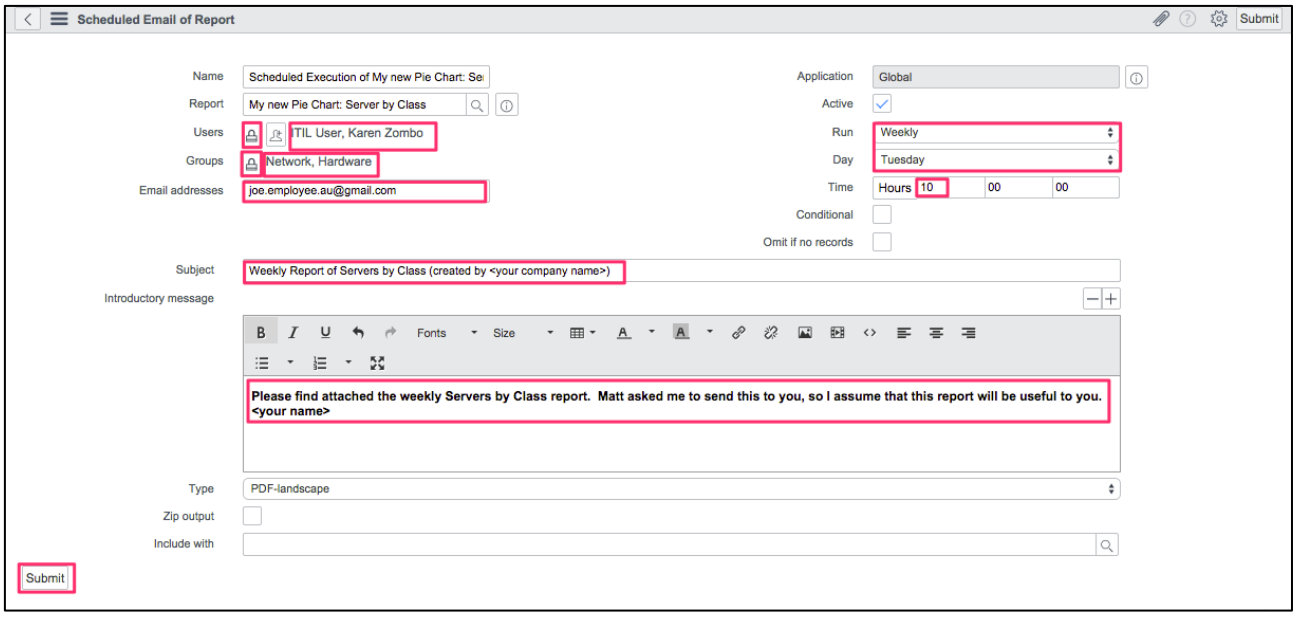
1. Navigate to **Reports > View/Run**.
2. Click the title of the report: **My new Pie Chart: Server by Class**.
3. Click the **down arrow** next to the Save and select the **Schedule** option.



©2015 ServiceNow, Inc. All rights reserved.

4. Within the **Scheduled Email of Report** window, fill in the form with the following values, then click **Submit**.

   Users: **ITIL User, Karen Zombo**
   Groups: **Network**, **Hardware**
   Email Addresses: **joe.employee.au@gmail.com**
   Run: **Weekly**
   Day: **Tuesday**
   Time: **10:00:00**
   Subject: **Weekly Report of Servers by Class (created by <your company name>)**
   Introductory Message: **Please find attached the weekly Servers by Class report. Ryan asked me to send this to you, so I assume that this report will be useful to you. <your name>**
   Type: **PDF – landscape**

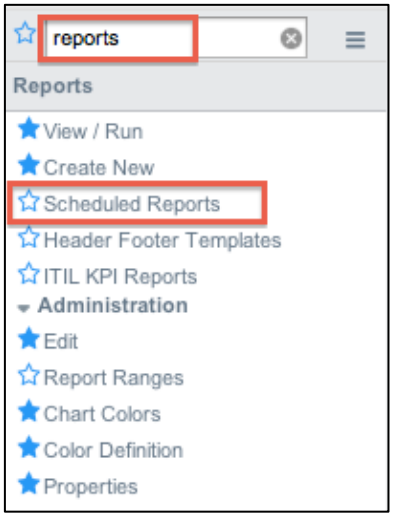


©2015 ServiceNow, Inc. All rights reserved.

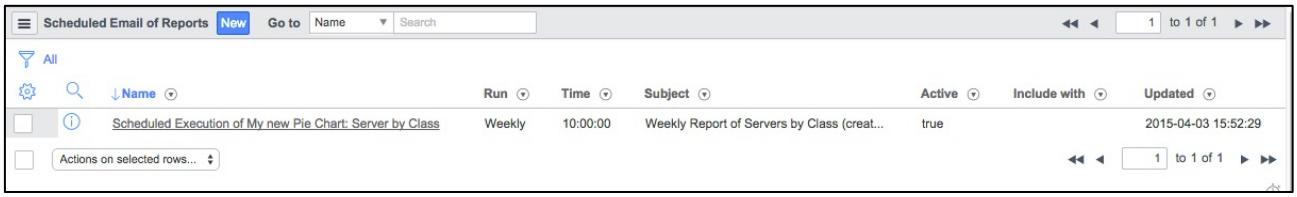
Lab Success Verification

In order to verify that the report has been scheduled, review the list of scheduled reports.

1. Navigate to **Reports > Scheduled Reports**.



2. Review the list of scheduled reports, and find the **CI by Server (Pie Chart)** report that was scheduled in this exercise.



©2015 ServiceNow, Inc. All rights reserved.

Useful Links

Base System Reports
http://wiki.servicenow.com/index.php?title=Base_System_Reports

Generating Reports
http://wiki.servicenow.com/index.php?title=Generating_Reports

Report Types
http://wiki.servicenow.com/index.php?title=Reporting#Report_Types

New Reporting Features in Fuji
http://wiki.servicenow.com/index.php?title=Reporting#Fuji

©2015 ServiceNow, Inc. All rights reserved.