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

Reporting 201

Advanced Methods & Performance Analytics Intro

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Default Login / Password:

admin / Knowledge15

itil / Knowledge15

employee / Knowledge15

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Lab Goal

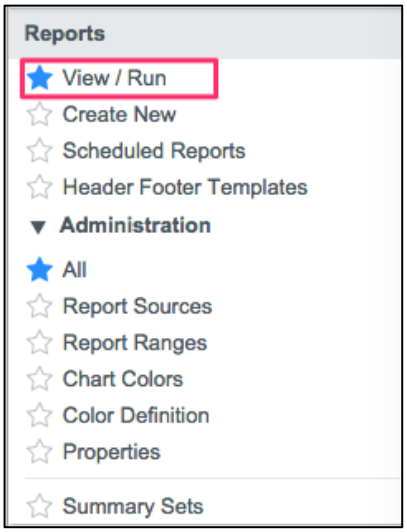
This lab explains some of the administrative functions for Report Management. It also explains view stats, utilization, and layout options.

Lab 1
Report Management

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.

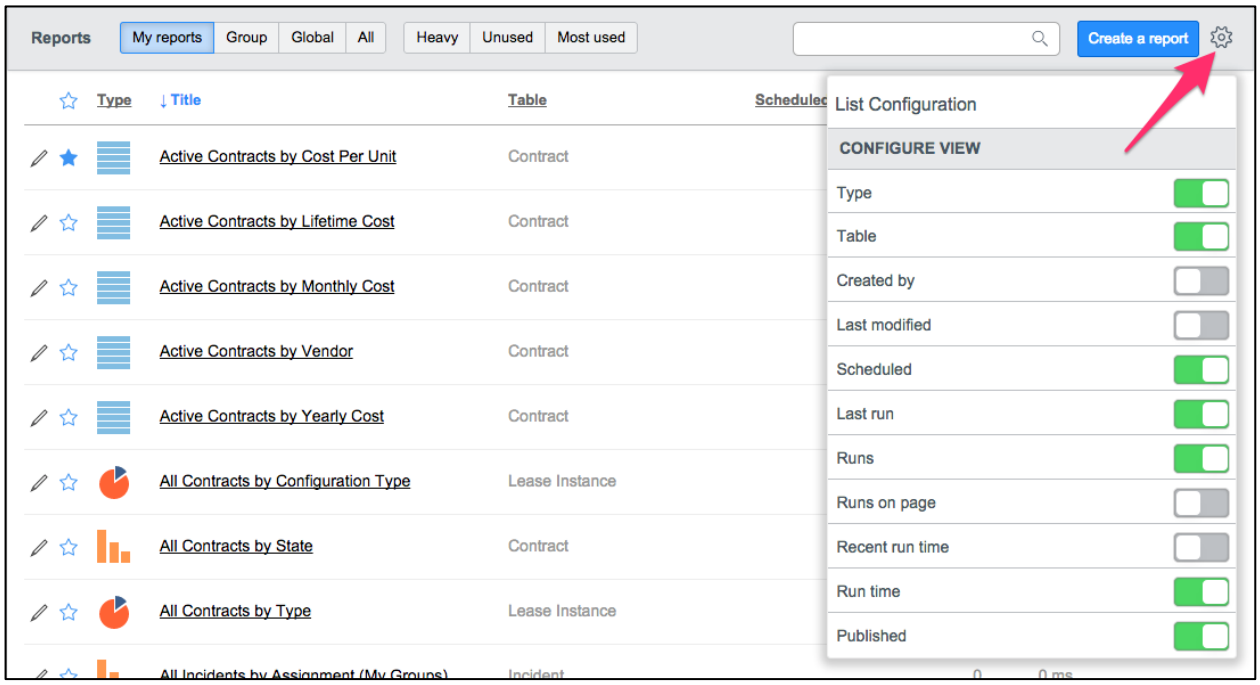
2. Navigate to **Reports > View / Run** from the menu.



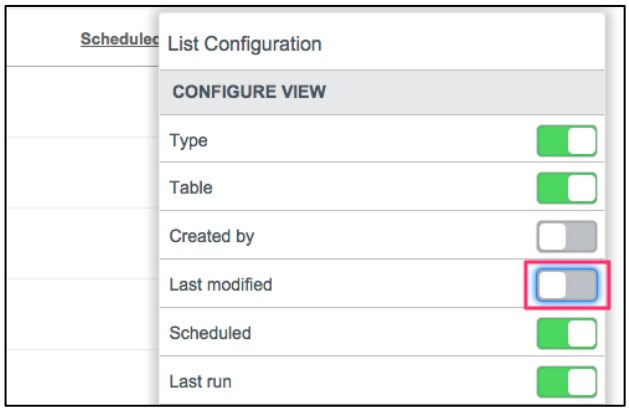
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Configure Column List

1. Select the **gear** icon on the right side of the page for view column visibility menu.

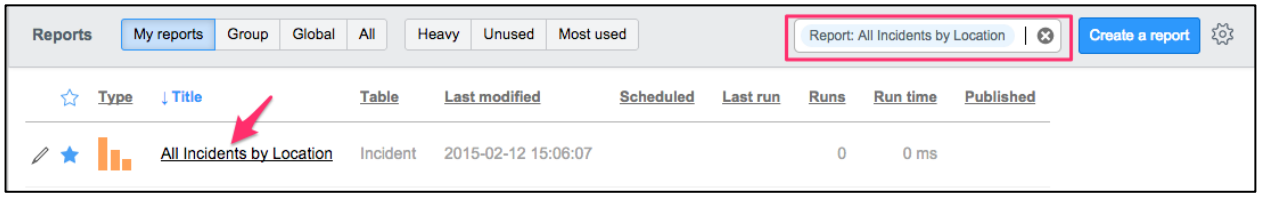


2. Enable the **Last Modified** column by clicking the tab.

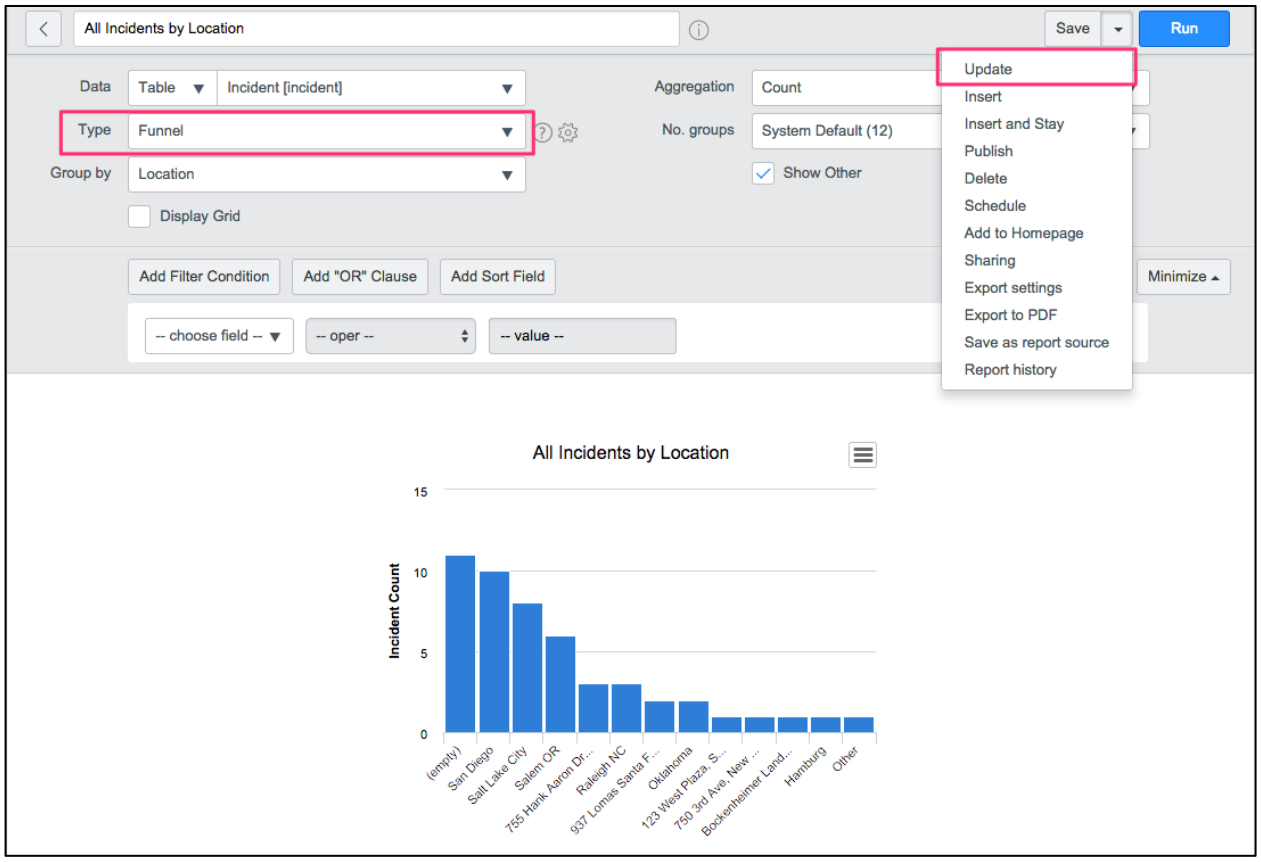


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3. Search for a report with the title of **All Incidents by Location**. Click the report title.



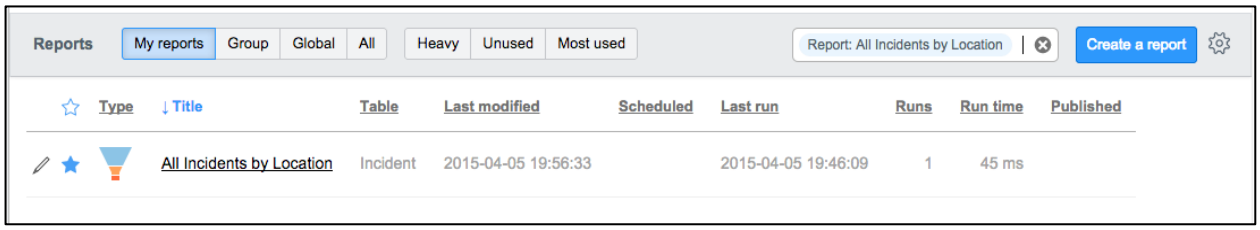
4. Change the report type to from **Bar** to **Funnel**. Click the down arrow next to the **Save** button and select **Update**.



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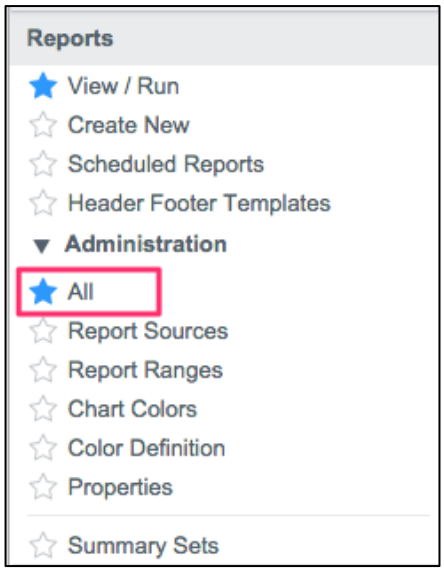
Lab Success Verification

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



Lab Challenge – Add report stats report views as related fields

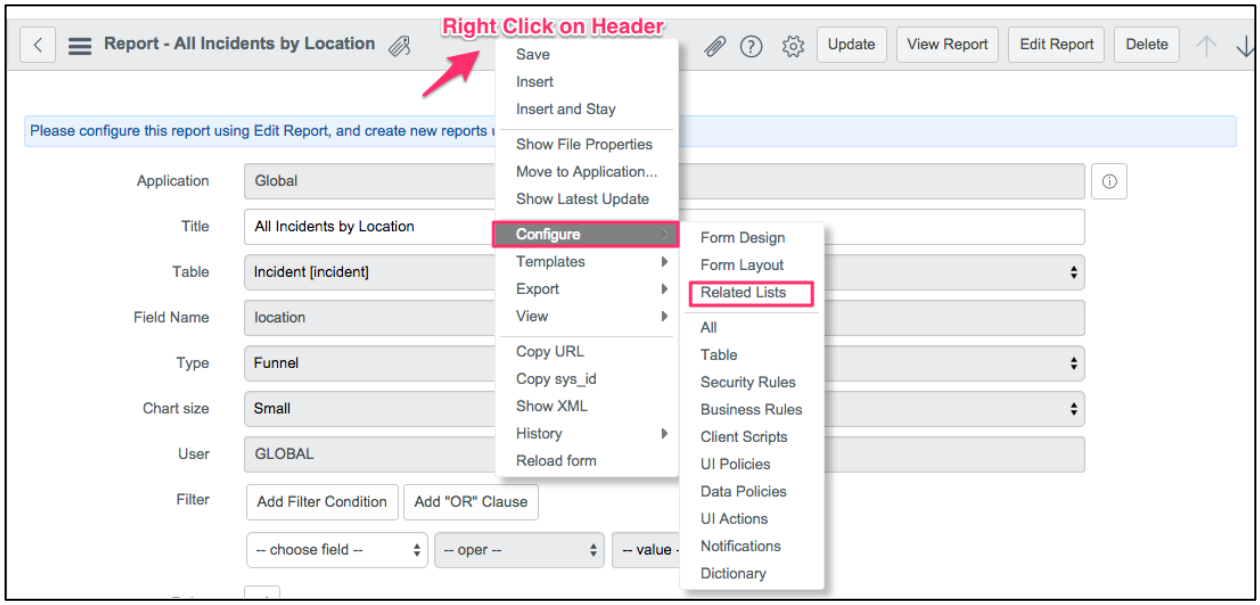
1. Navigate to **All** reports and search for **All Incidents by Location.**



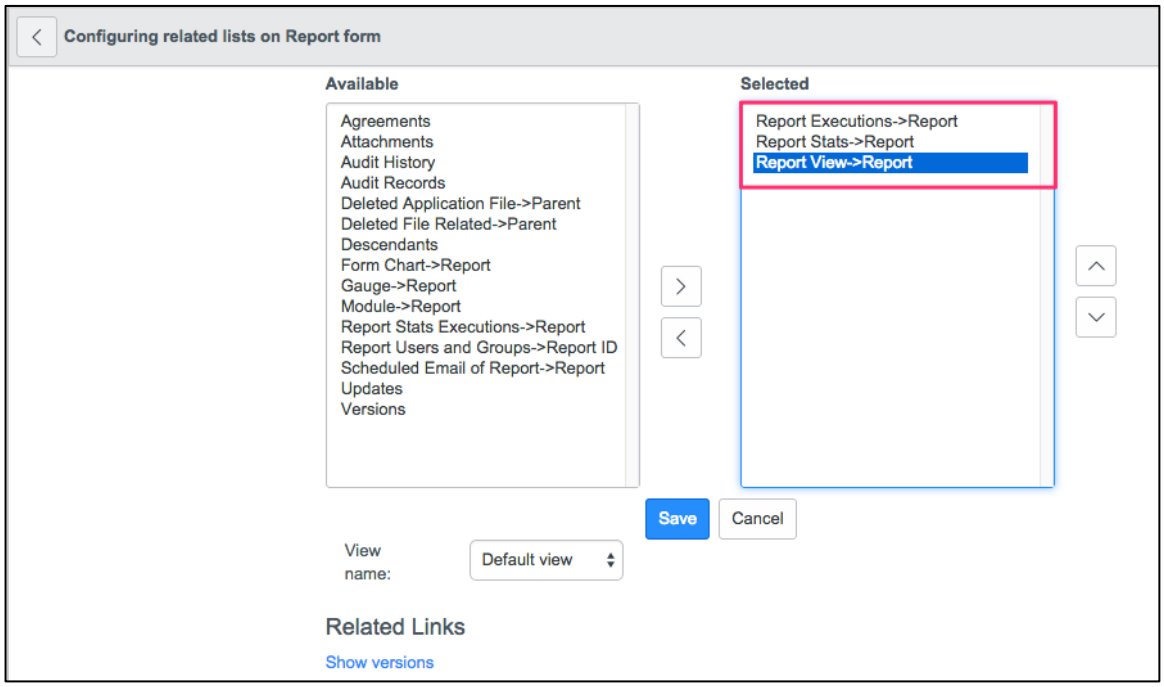


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2. Click **All Incidents by Location**. Right-click the header and click **Configure > Related List**.



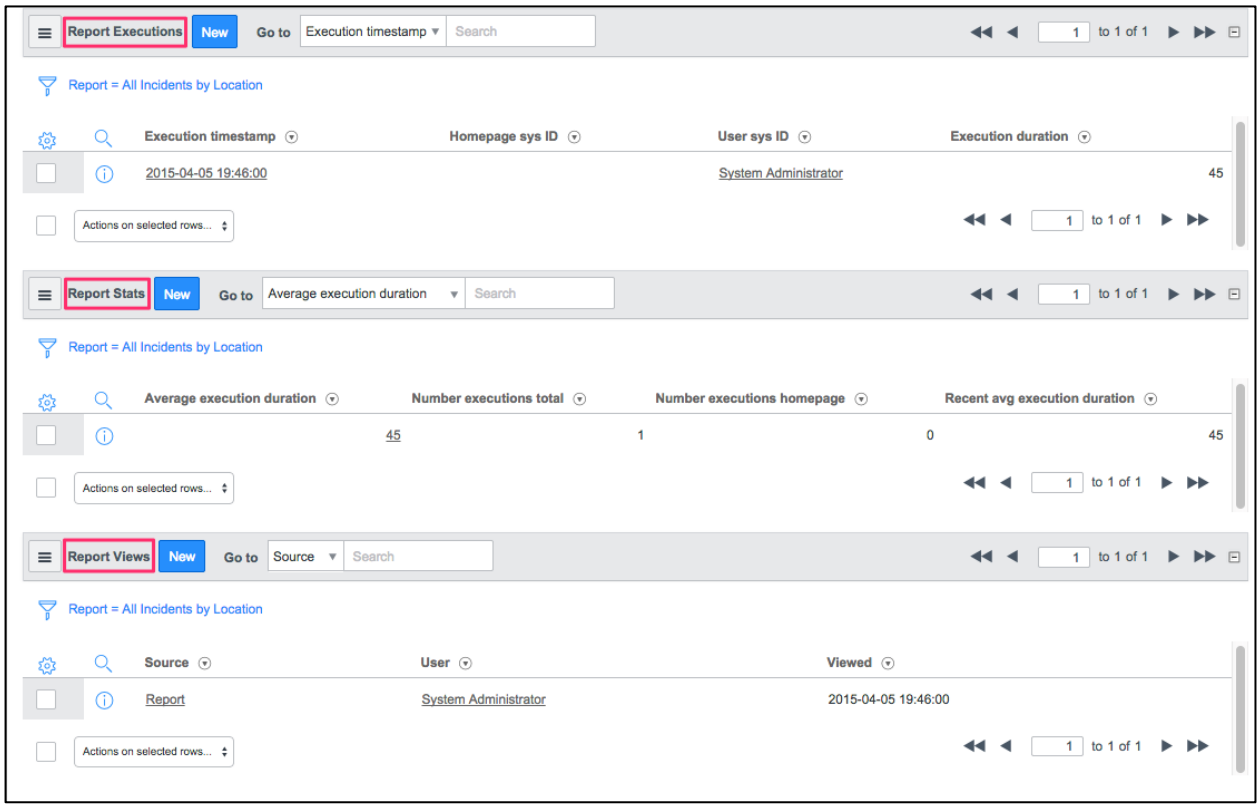
3. Select **Report Executions > Report, Report Stats > Report, Report View > Report** from the available list. Click **Save** after you select the related lists.



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Lab Success Verification

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



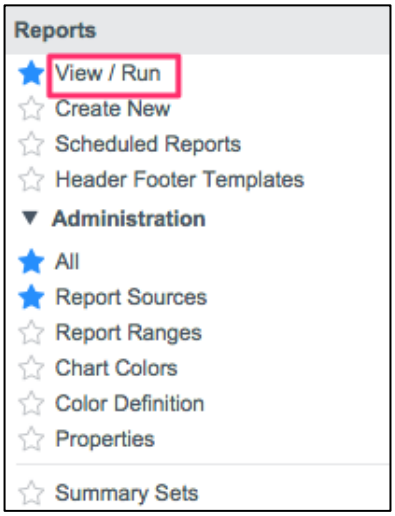
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Lab Goal

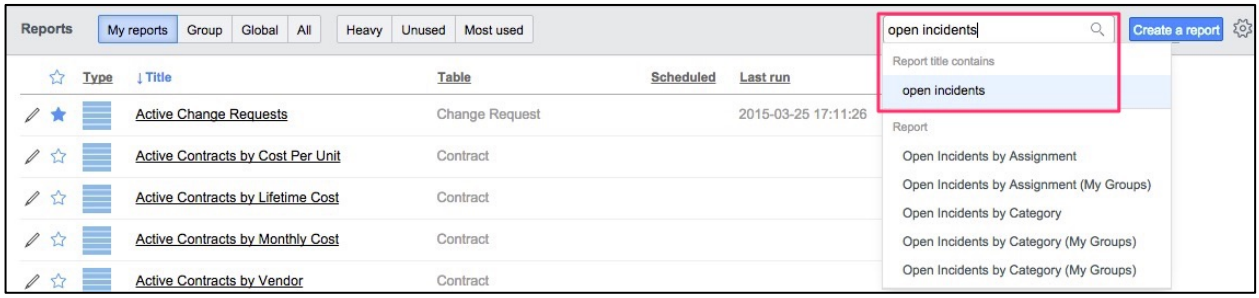
This lab explains how to leverage an existing report as a foundation data for all new reports that leverage similar core filter conditions.

Lab 2
Report Sources

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

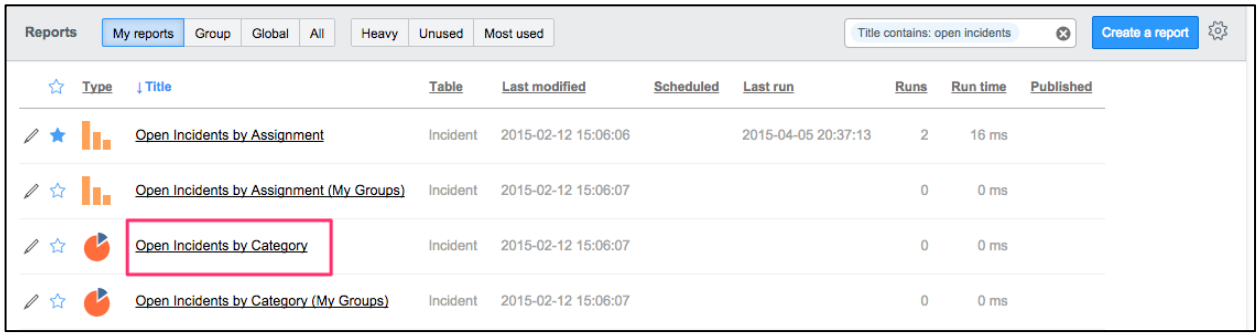


2. Search for a report, using the search function at the top-right of the window. Type **Open incidents** into the search box and press **Enter**.



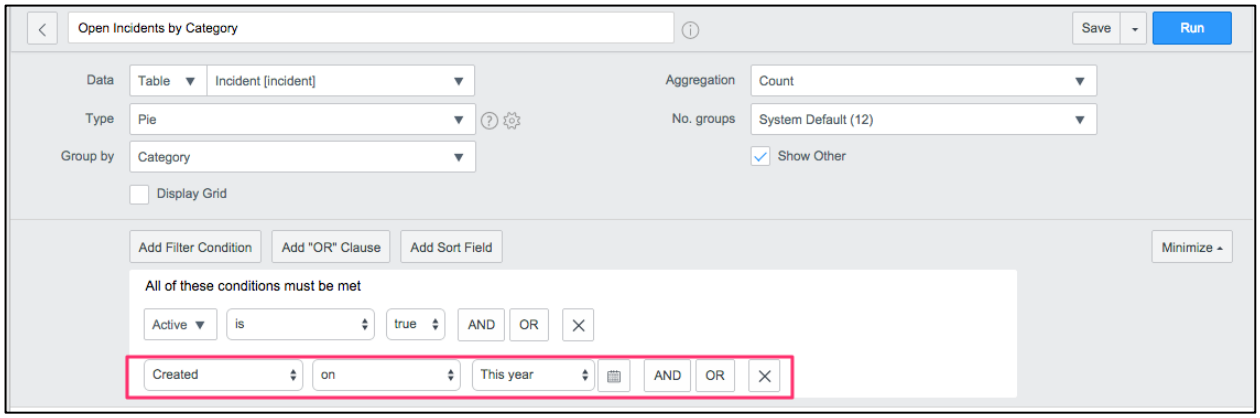
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3. Click on **Open Incidents by Category.**

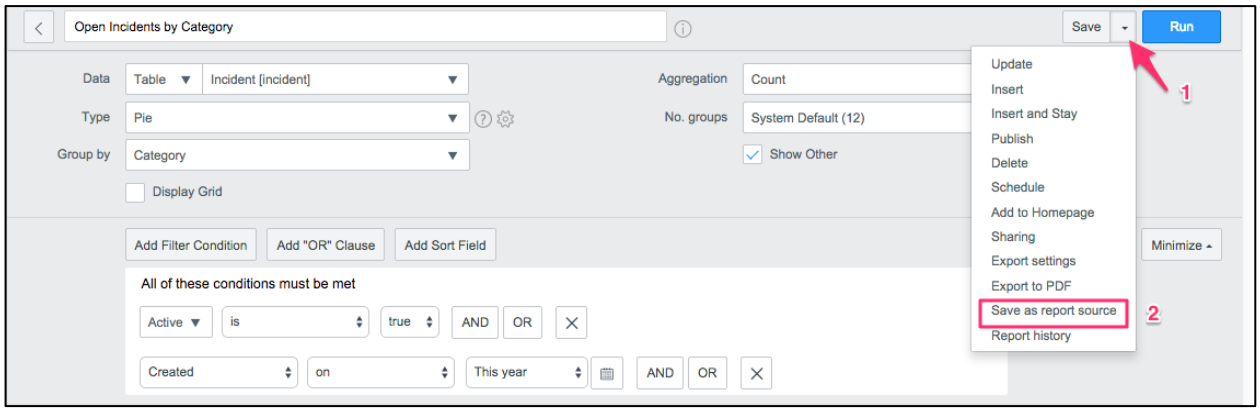


4. Click on **Add Filter Condition** to modify the existing report.

   - **Created + on + This Year**

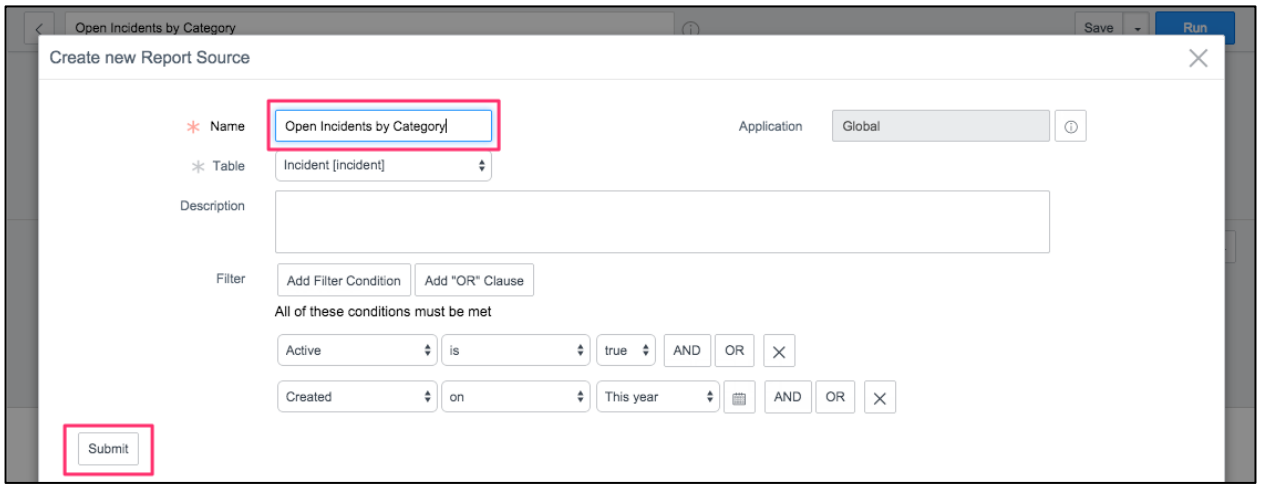


5. Click the down arrow next to the **Save** button. Then select **Save as report source**.



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6. A popup window appears. Name the report source **Open Incidents by Category**. Click **Submit** to save.



7. Click **View /Run** and navigate to the **Create a Report** button on the upper-right side of the page. Click the **Create a Report** button.



8. The default value for the data field is **Table**. Click the down arrow and select **Report Sources.**



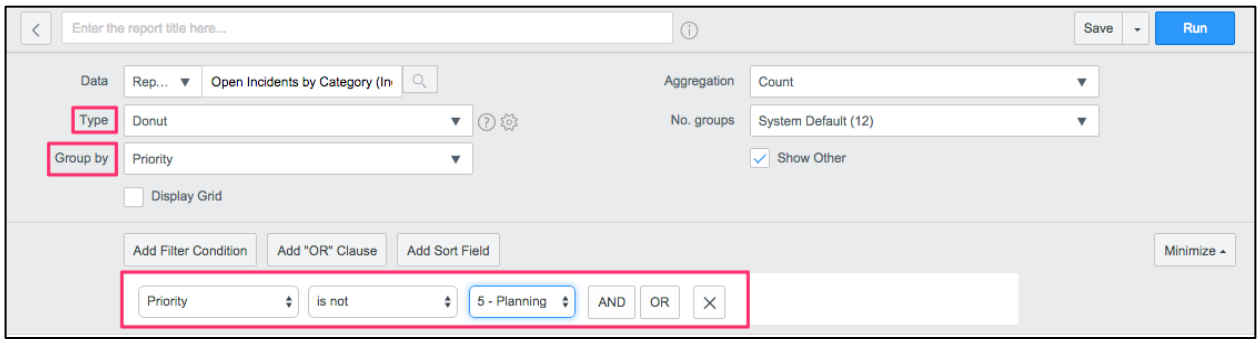
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9. Type **Open Incidents by Category** in the second column of the **Data** field and select the report source you created in step 6.



10. Modify the Type, Group by fields and Add Filter Condition.

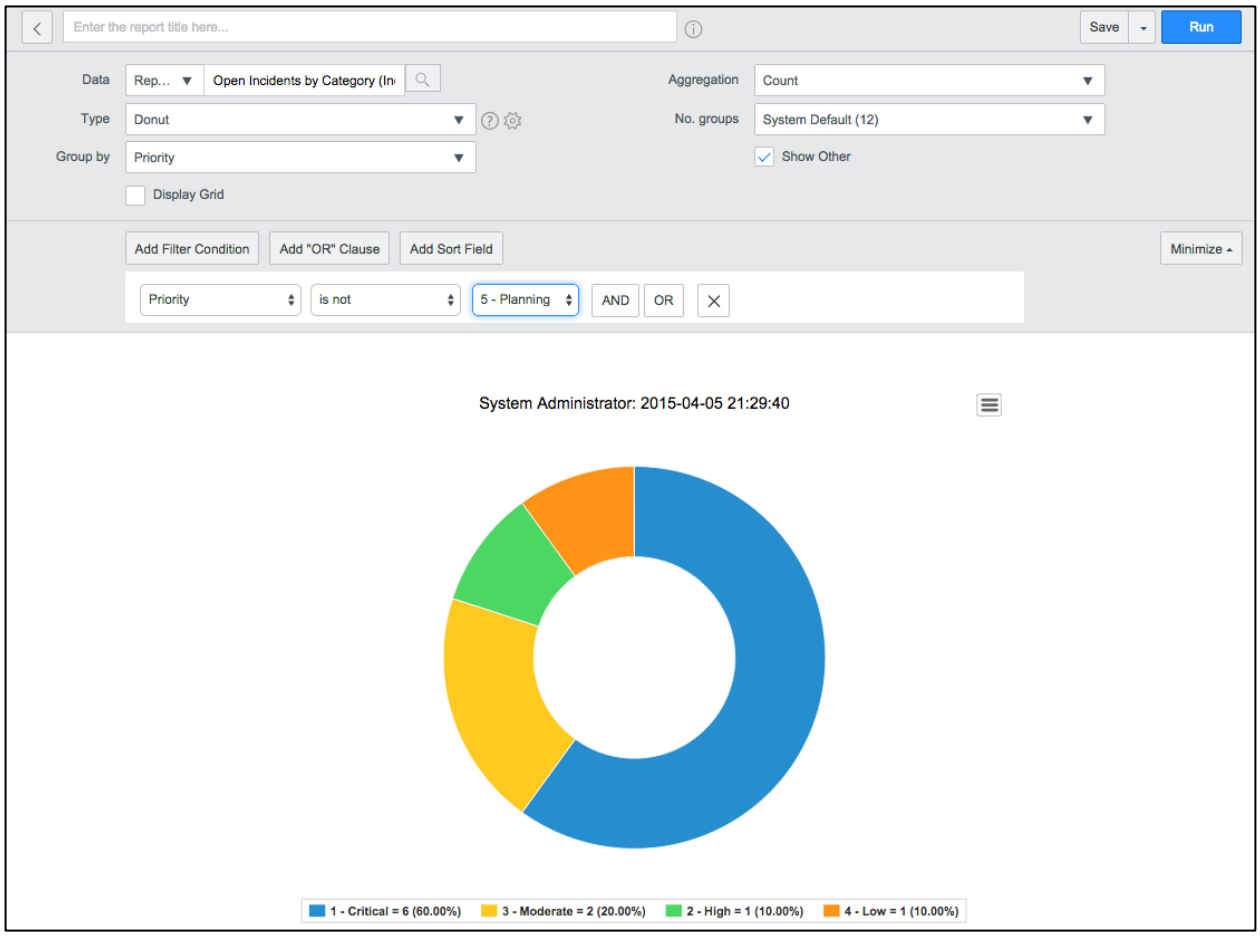
- Type: **Donut**
- Group by: **Priority**
- Add Filter Condition: **Priority + is not + 5 – Planning**



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Lab Success Verification

1. The report should look like the example below.



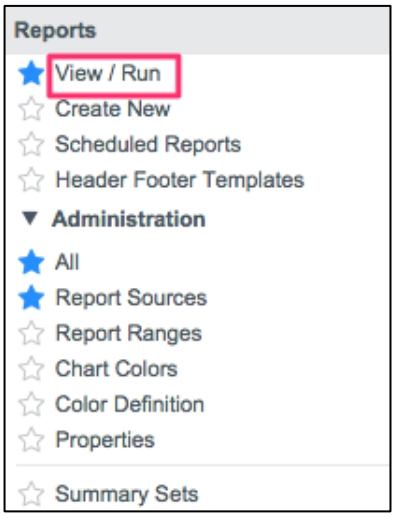
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Lab Goal

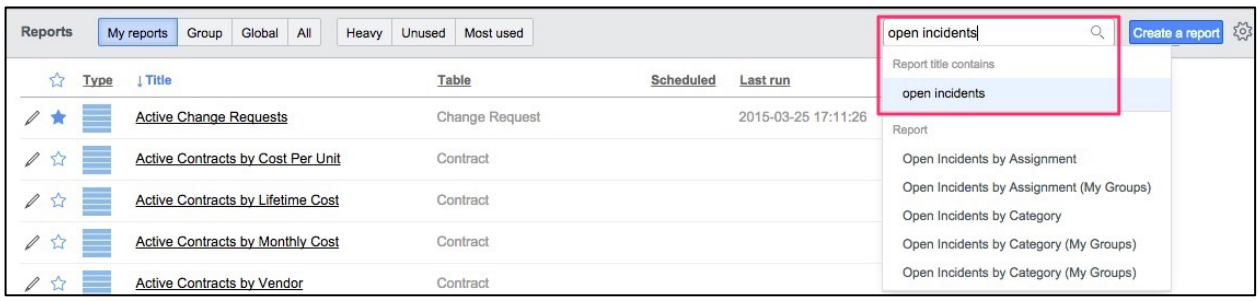
This lab explains how Dot-walking provides access to fields on related tables from a form or lists.

Lab 3
Dot-Walking

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

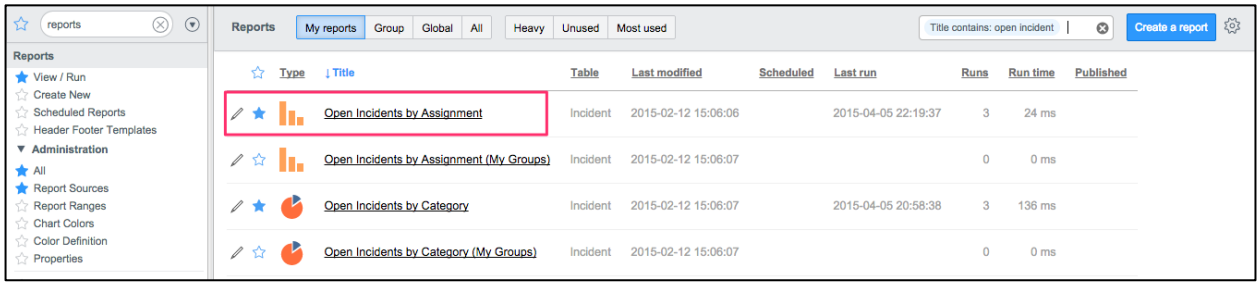


2. Search for a report, using the search function at the top-right of the window. Type **Open incidents** into the search box and press **Enter**.

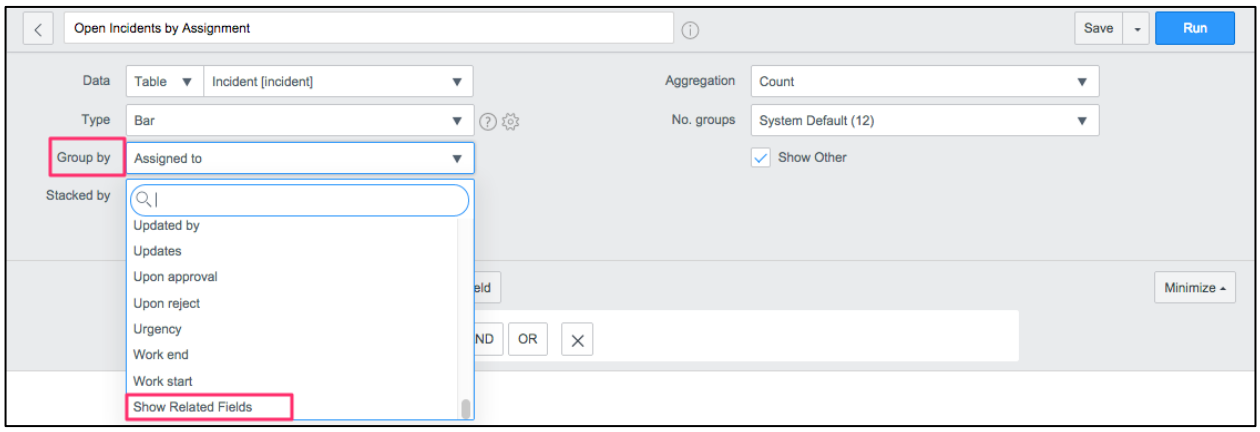


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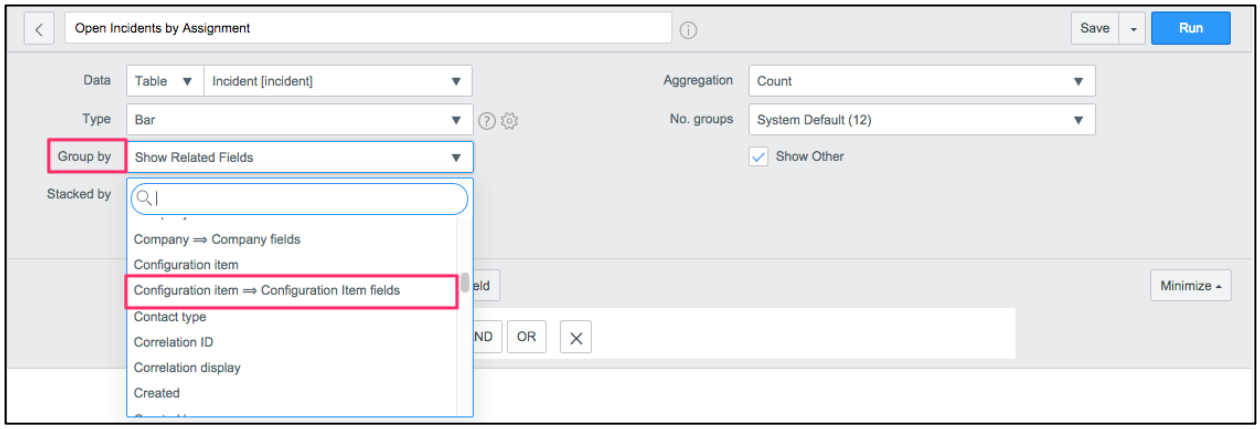
3. Select the report named **Open Incidents by Assignment** by clicking on the title.



4. Navigate to the **Group by** field and scroll to the bottom of the list. Select **Show Related Fields**.

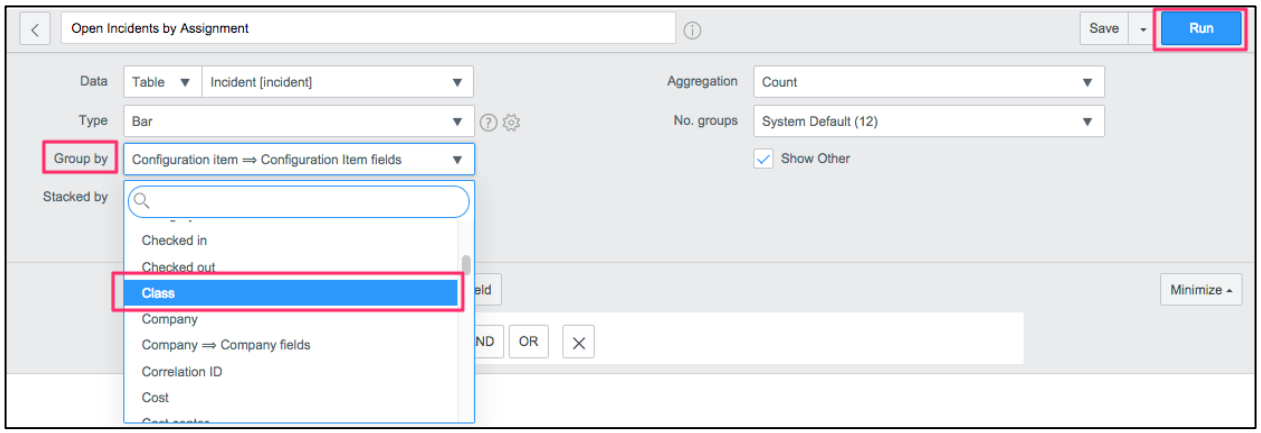


5. Navigate back to the **Group by** field and select **Configuration Item > Configuration Item Fields**.



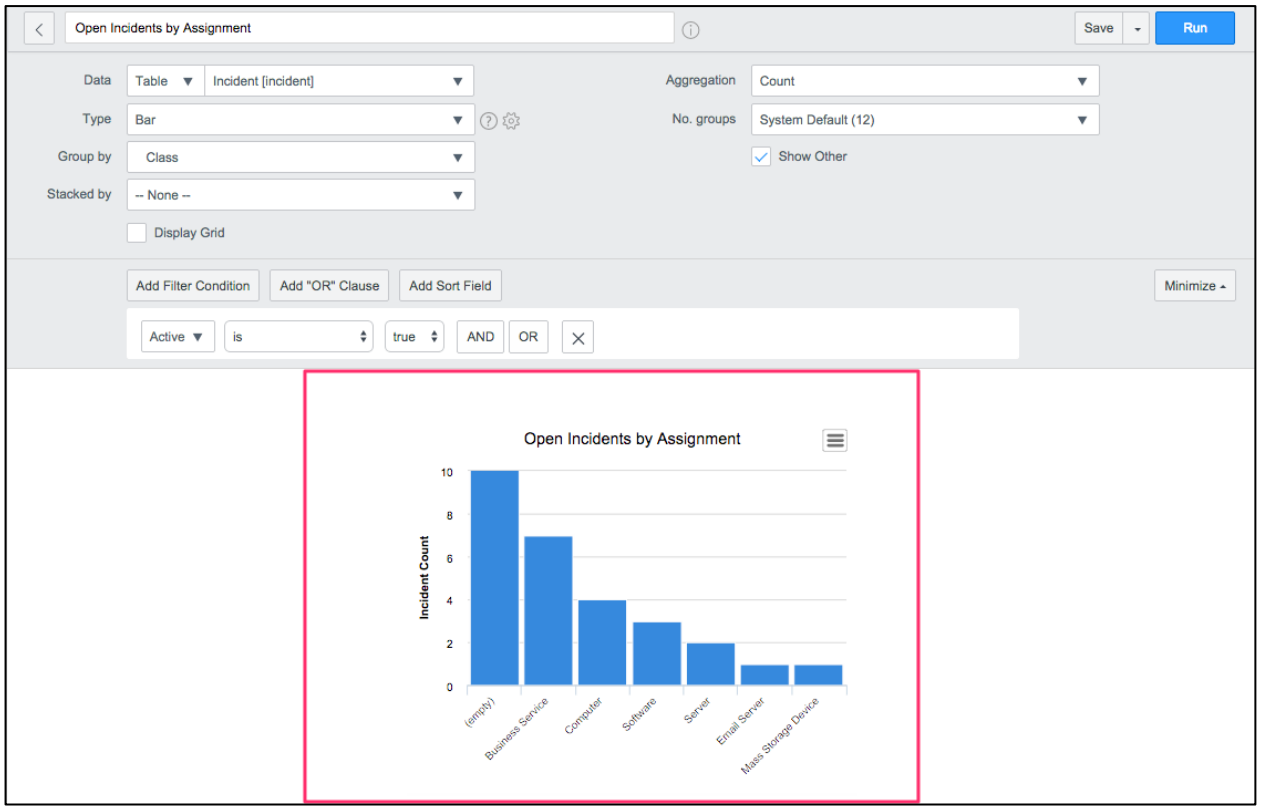
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6. Navigate back to the **Group by** field and select **Class**. Then click **Run** on the upper right of the page.



Lab Success Verification

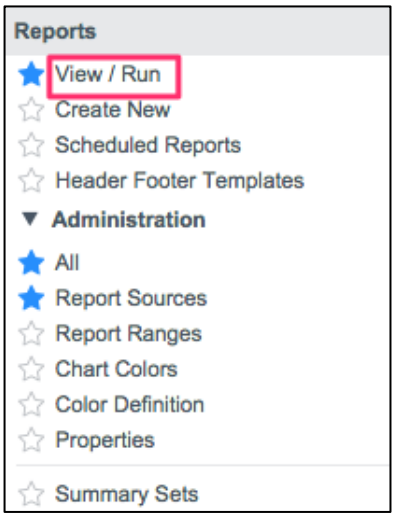
1. The report should look like the example below.



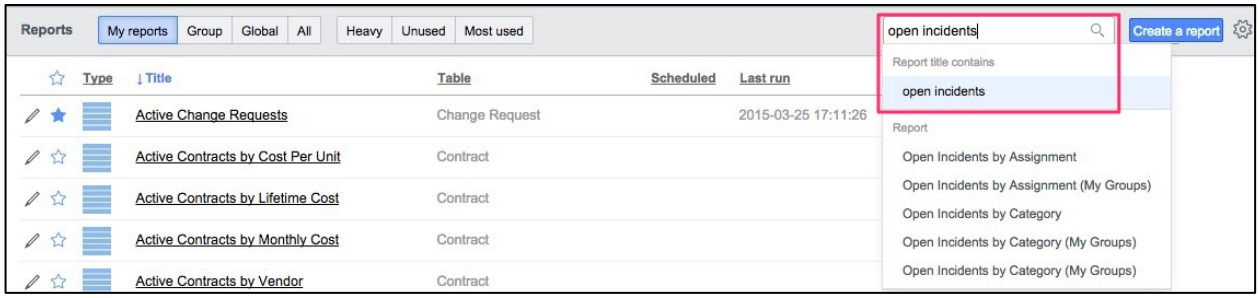
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Lab Challenge – Add report stats report views as related fields

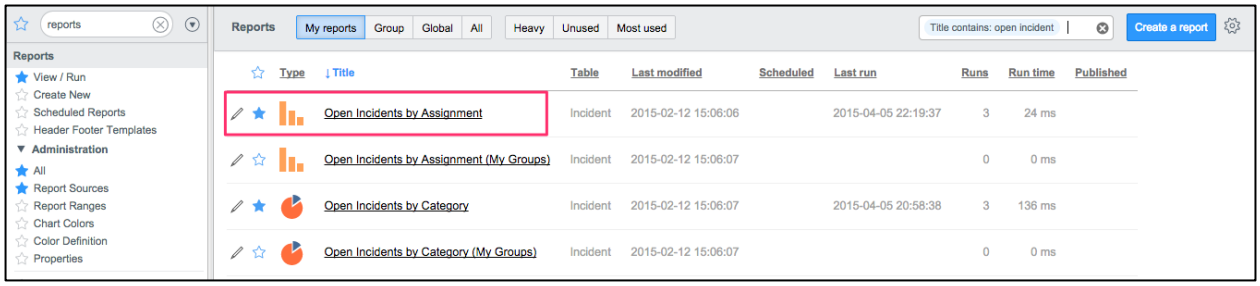
1. Navigate to **Reports > View/Run**.



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**.

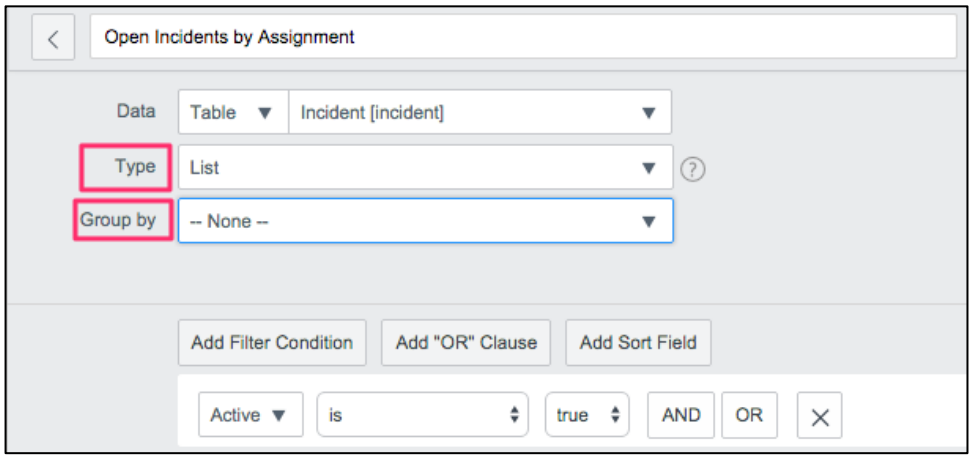


3. Select the report named **Open Incidents by Assignment** by clicking on the title.

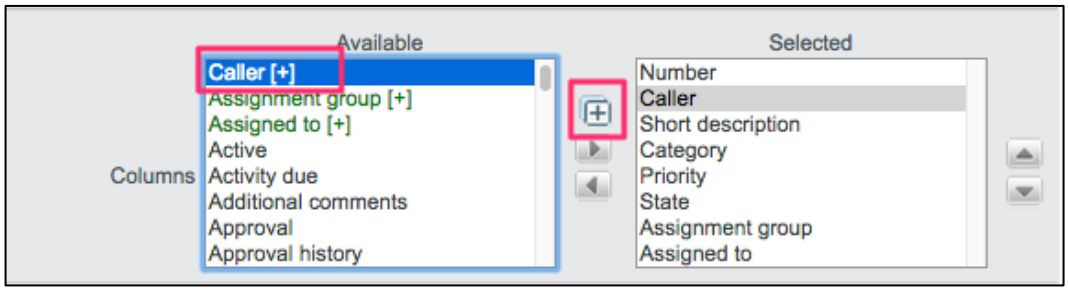


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4. Change the **Type** and **Group by** fields**.**
   - Type: **List**
   - Group by: **--None—**

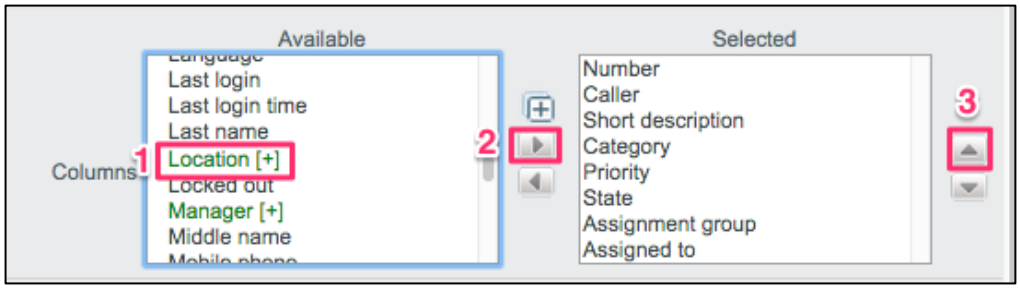


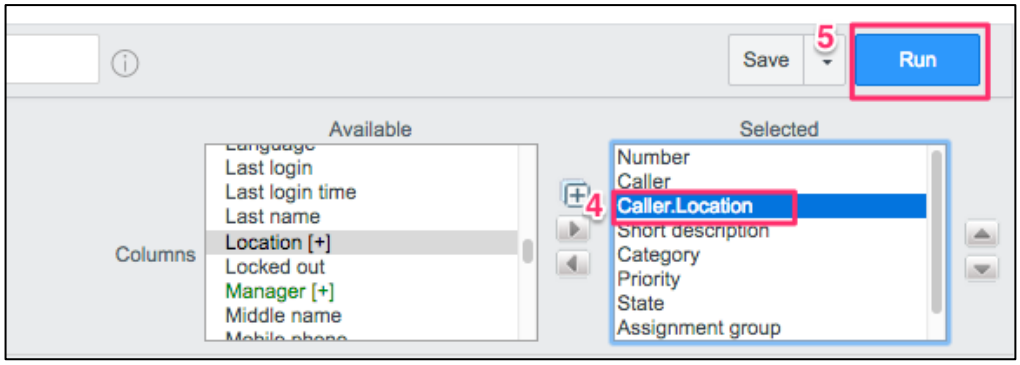
5. Click the **Caller** field. When you see the **plus** icon, click it to expand the **Caller** field attributes.



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6. Now select the **Location** field from the **Available** list from the left column. After you select the **Location** field, click the **arrow pointing to the right** to add your selection. Fields added to the **Selected** column appear at the bottom of the list. Use the **up arrow** to move the **Location** field below **Caller**. You should now see **Caller.Location**. Click **Run** after you see **Caller.Location** listed under the **Caller** field.

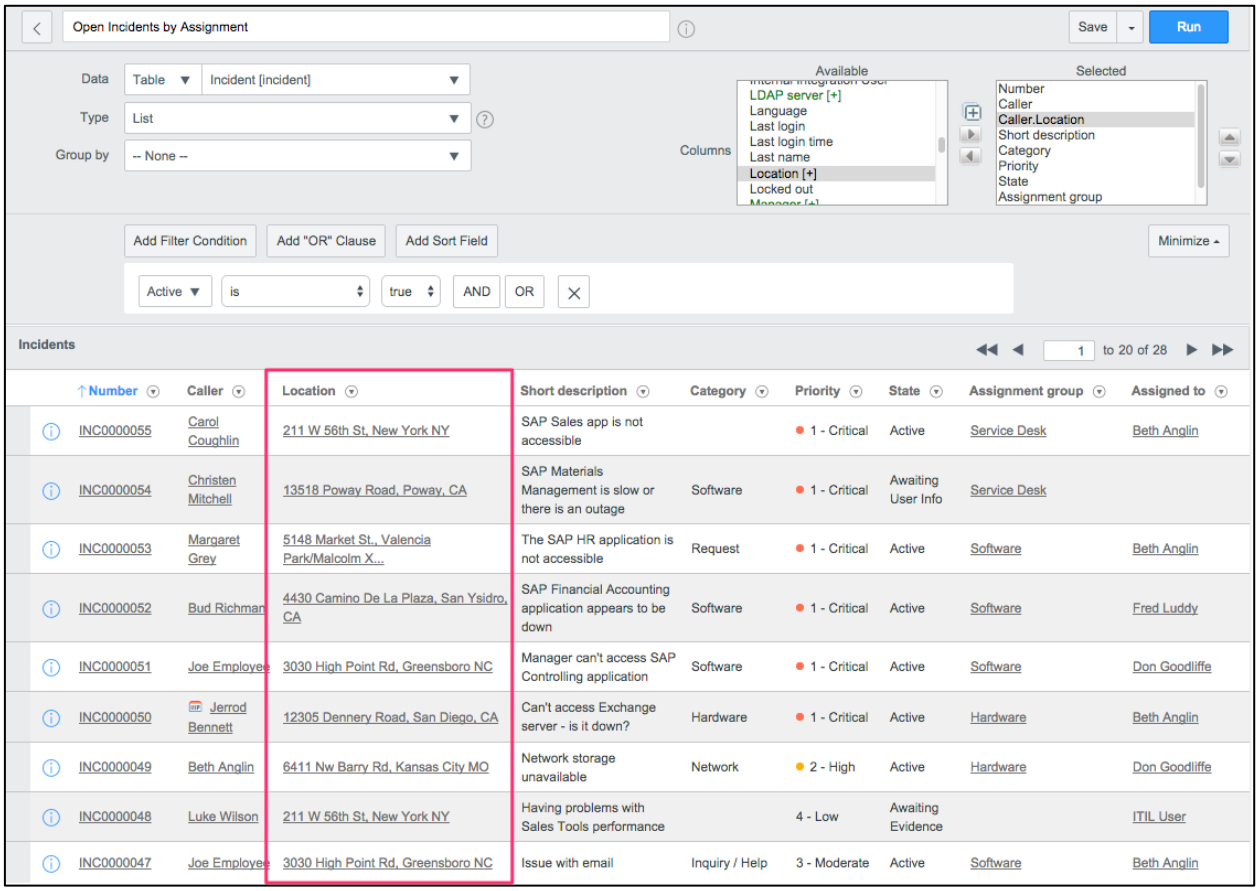




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Lab Success Verification

1. The report should look like the example below.



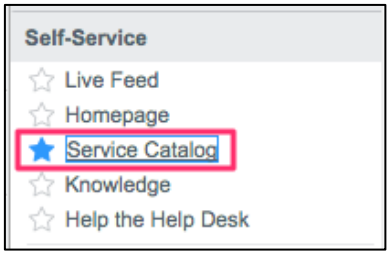
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Lab Goal

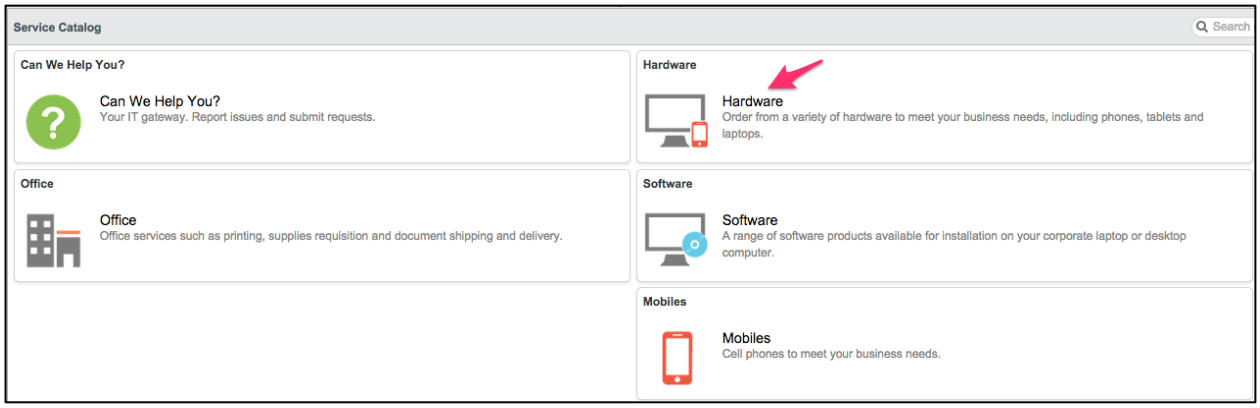
Lab 4
Report on Variables

This lab explains how reporting on variables is achieved. This is now a much more simplified process the legacy methods.

1. Navigate to **Self-Service > Service Catalog**.



2. Select the **Hardware** category.

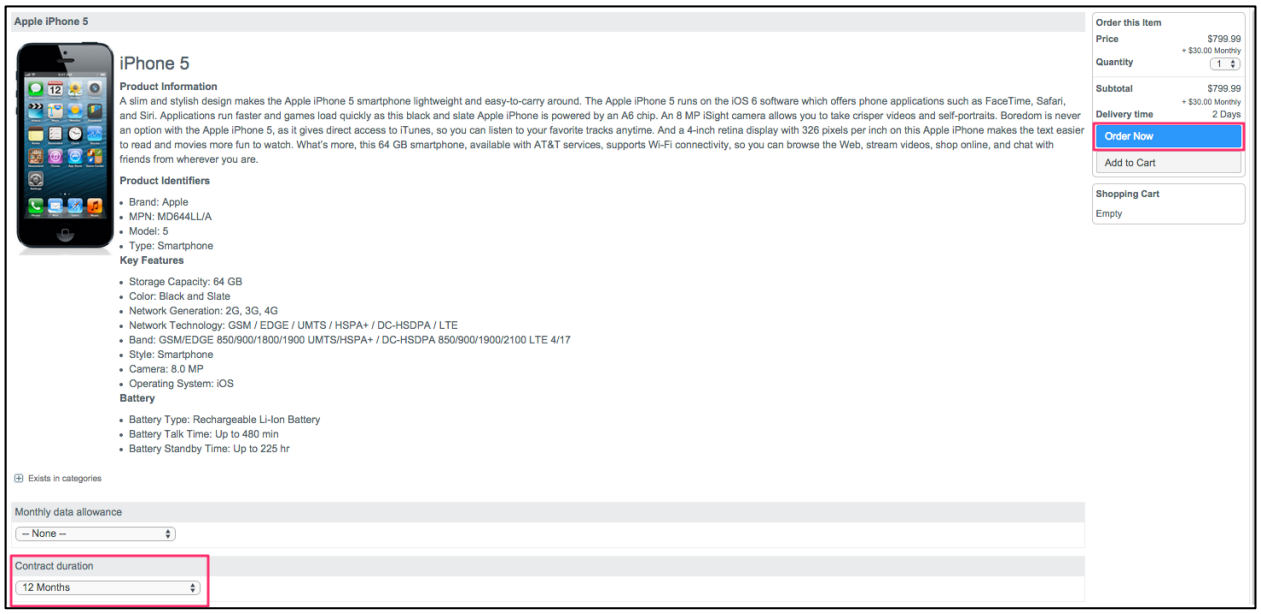


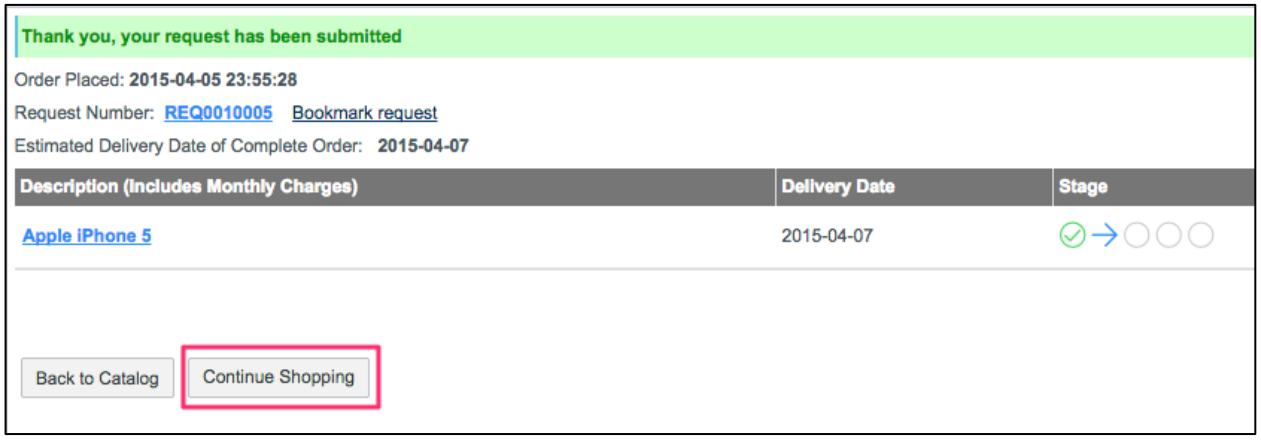
3. From the **Hardware** category, select **iPhone 5**.



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4. For the **Contract Duration** variable select **12 Months**. Click **Order Now**. Click on **Continue Shopping** to order a second iPhone.

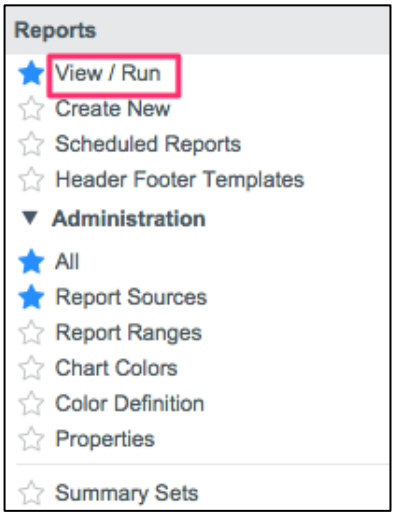




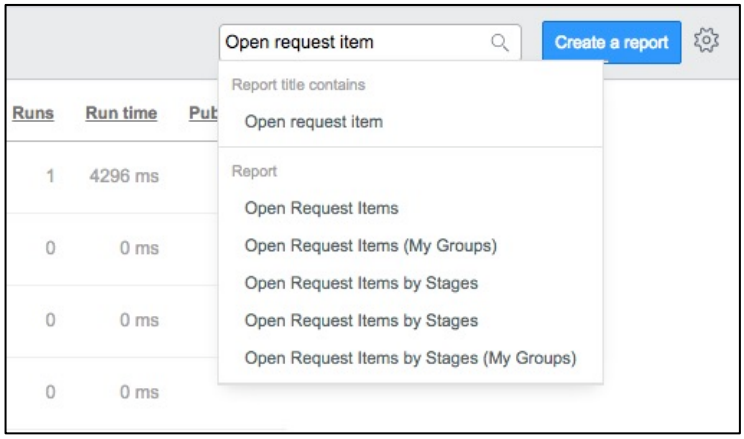
5. Order a second iPhone and change the **Contract Duration** to **18 Months**. Then click **Add to Cart**.

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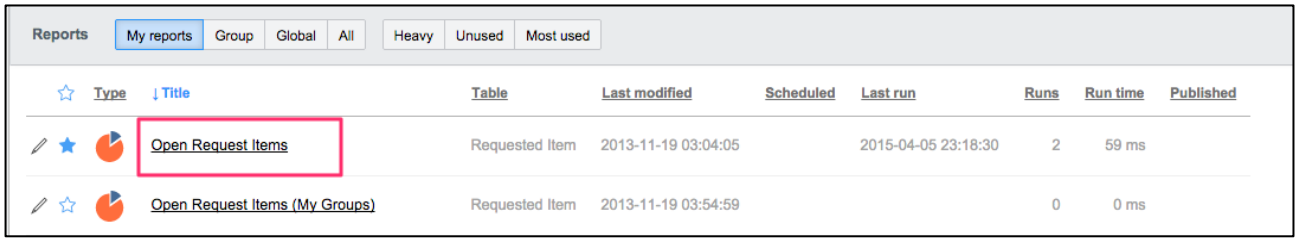
6. Navigate to **Reports > View/Run**.



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

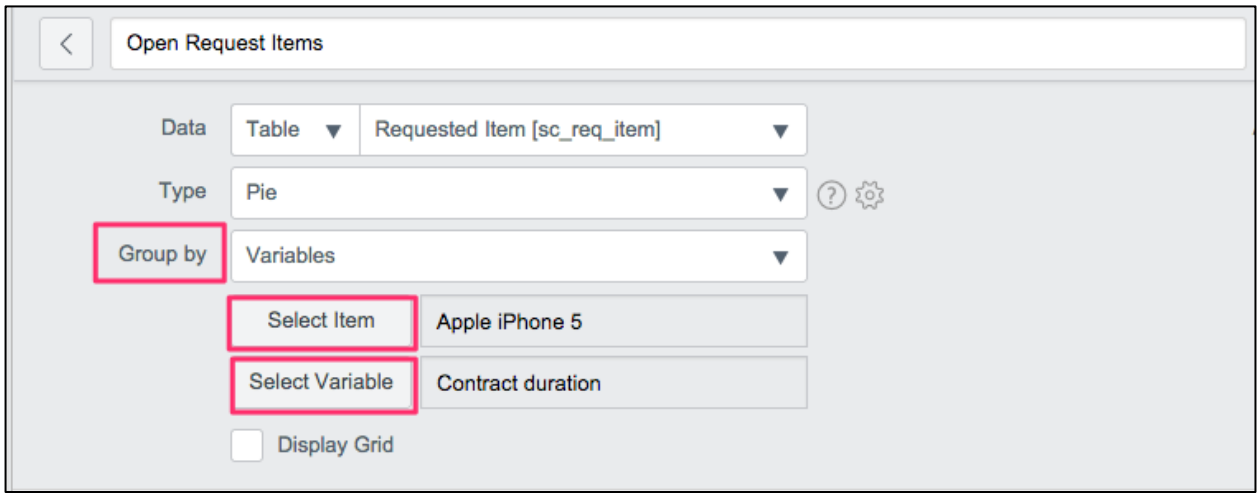


8. Select the report named **Open Request Items** by clicking on the title.



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9. Change the **Group by** filed to **Variables**. Then select **Apple iPhone 5** for **Select Item** and **Contract duration** for **Select Variable**.



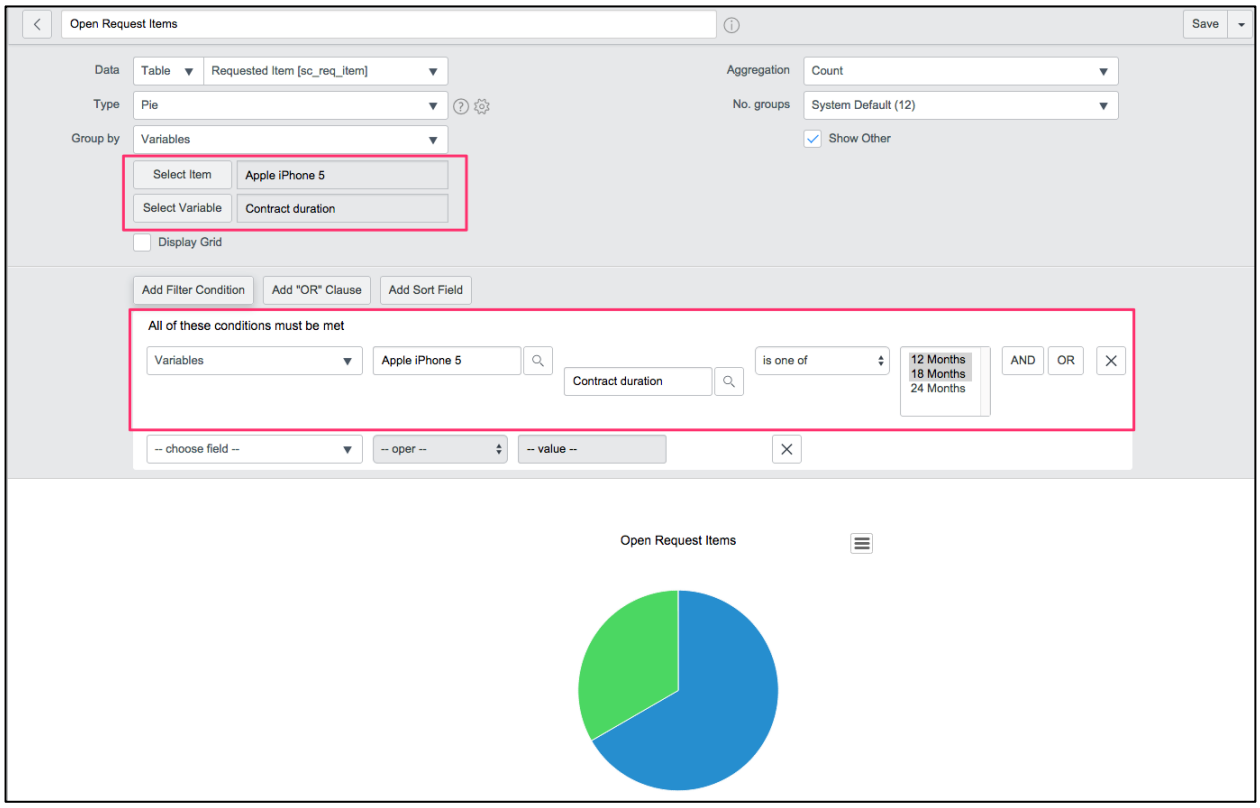
10. Set Filter Condition: **Variables + Apple iPhone 5 + Contract duration + is one of + (12 & 18 Months)**. Hold shift to select **12** and **18 Months**.



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Lab Success Verification

1. The report should look like the example below.



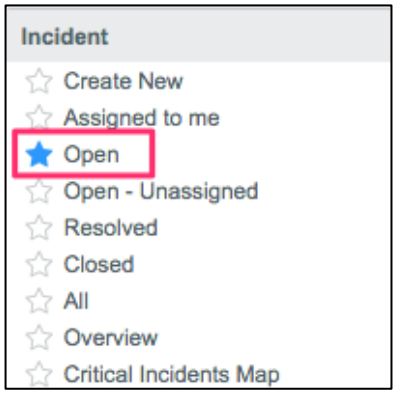
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Lab Goal

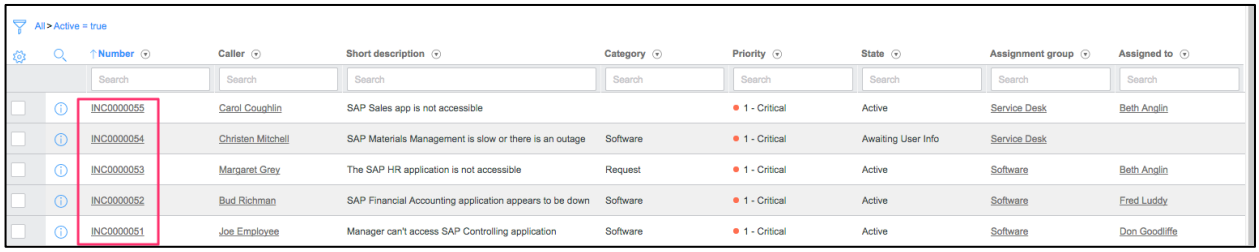
This lab explains how you can add predefined reports to a form. This data can be helpful when looking for treads as tickets get generated or provide visibility before triaging issues.

Lab 5
Chart On Form

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

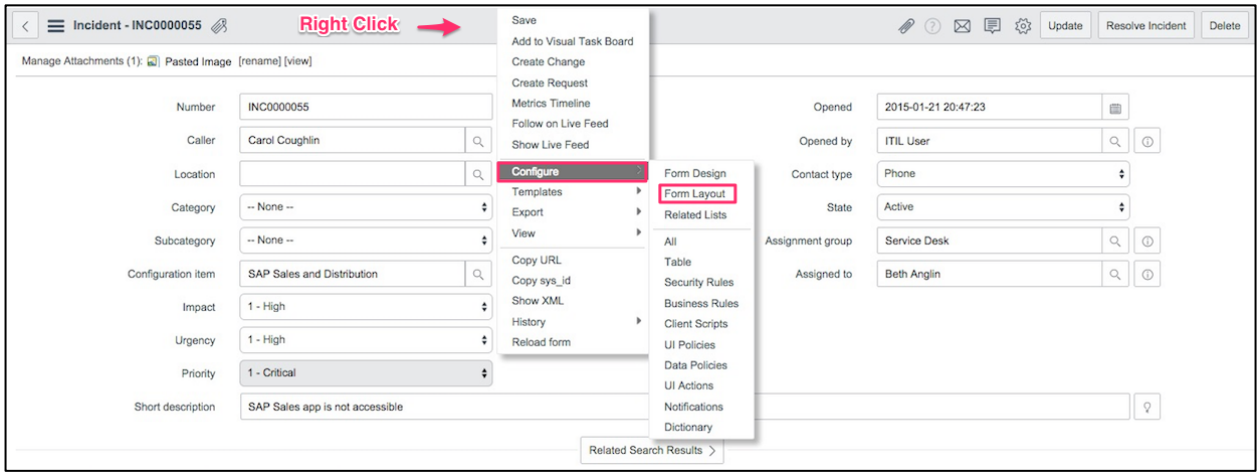


2. Select any incident from the list view.

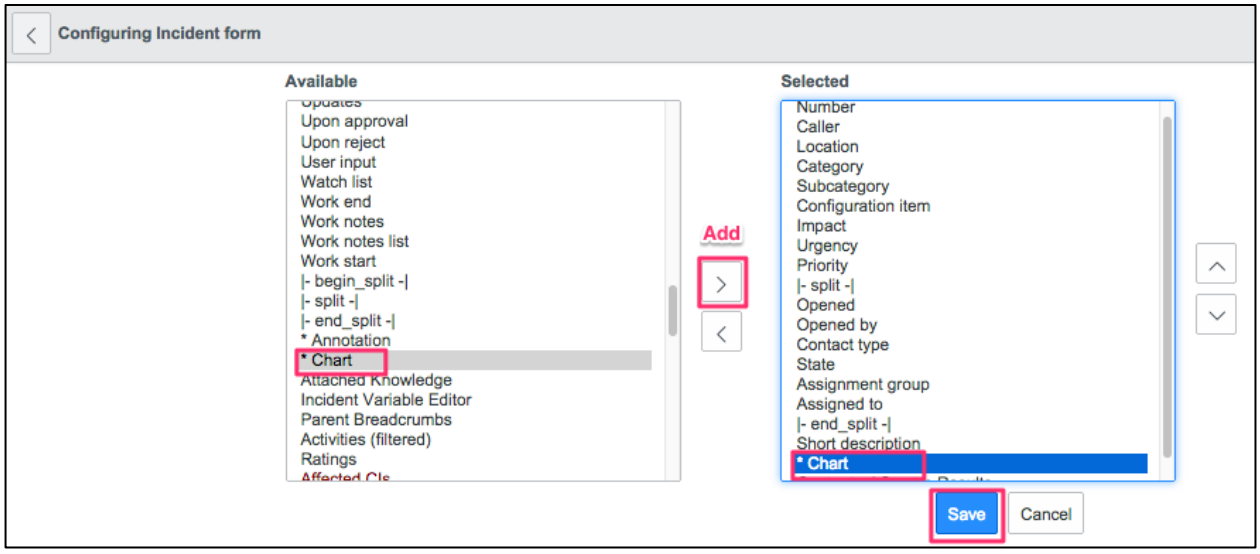


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3. After you are on the Incident form, **right-click the header** > **Configure** > **Form Layout.**

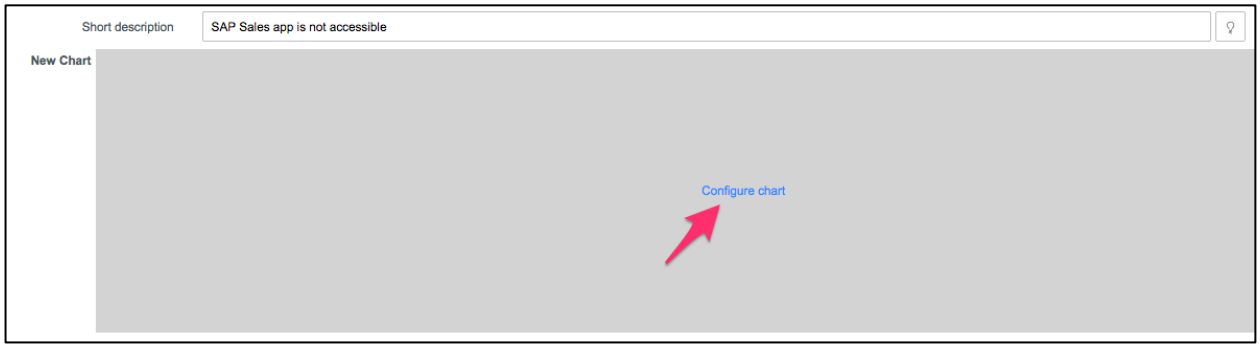


4. Select **Chart** from the left column**.** Click the **Add arrow** to move the Chart field right below the **Short description** field**.** After the field is added click **Save.**

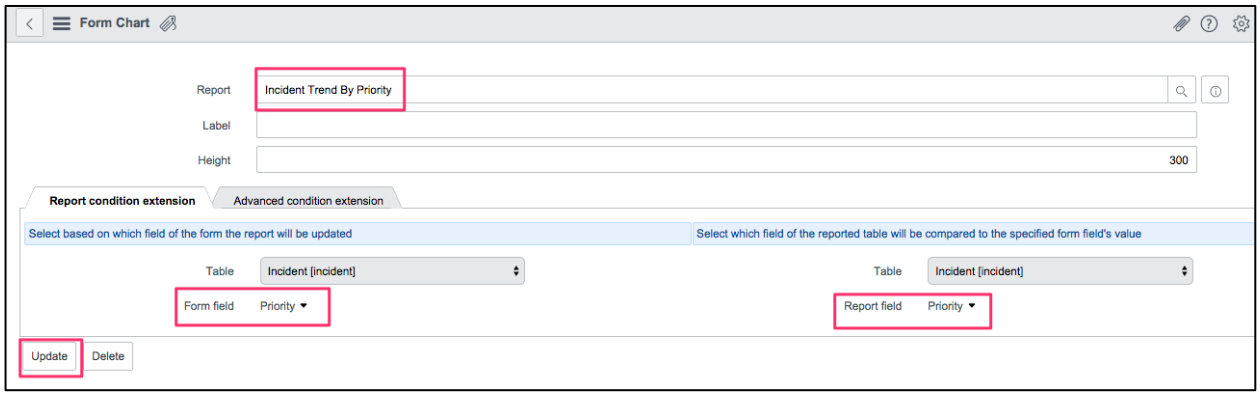


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5. Click the **Configure chart** to add content to the chart.



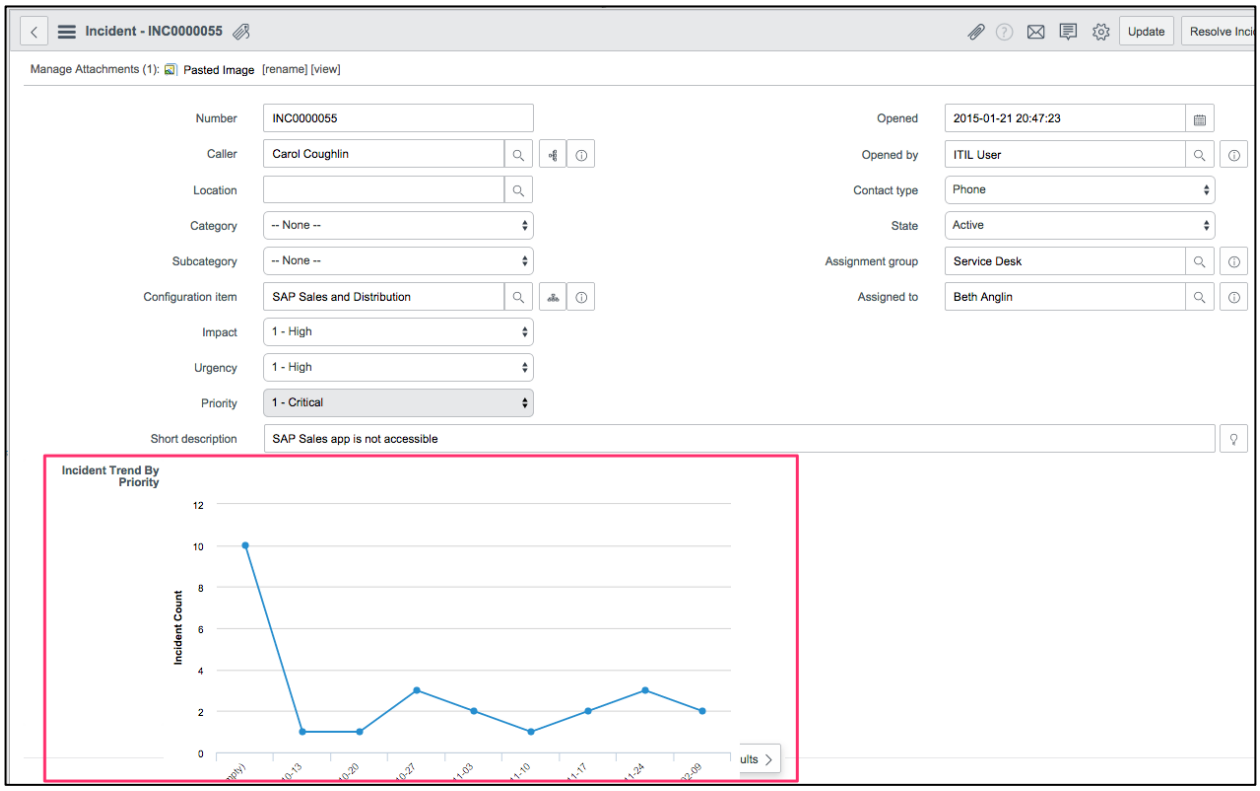
6. Select **Incident Trend by Priority** in the **Report Field**. For the **From field** and **Report field** select **Priority**. After you populate these fields, click **Update**.



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Lab Success Verification

1. The report should look like the example below.



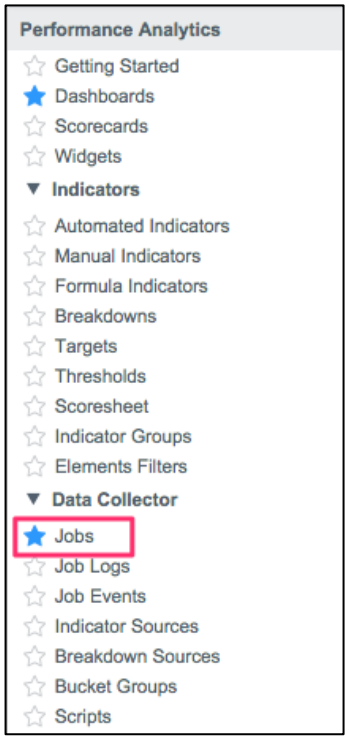
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Lab Goal

This lab explains how you can add predefined reports to a form. This data can be helpful when looking for treads as tickets get generated or provide visibility before triaging issues.

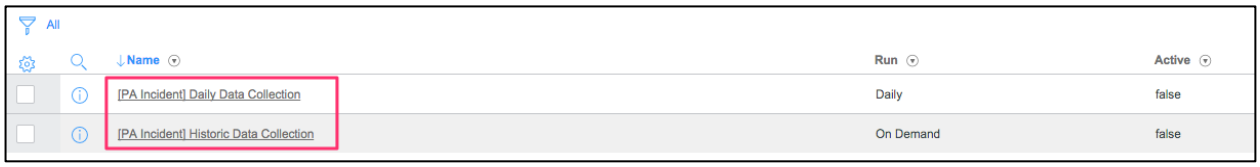
Lab 6 Activate PA for Incident Mgmt.

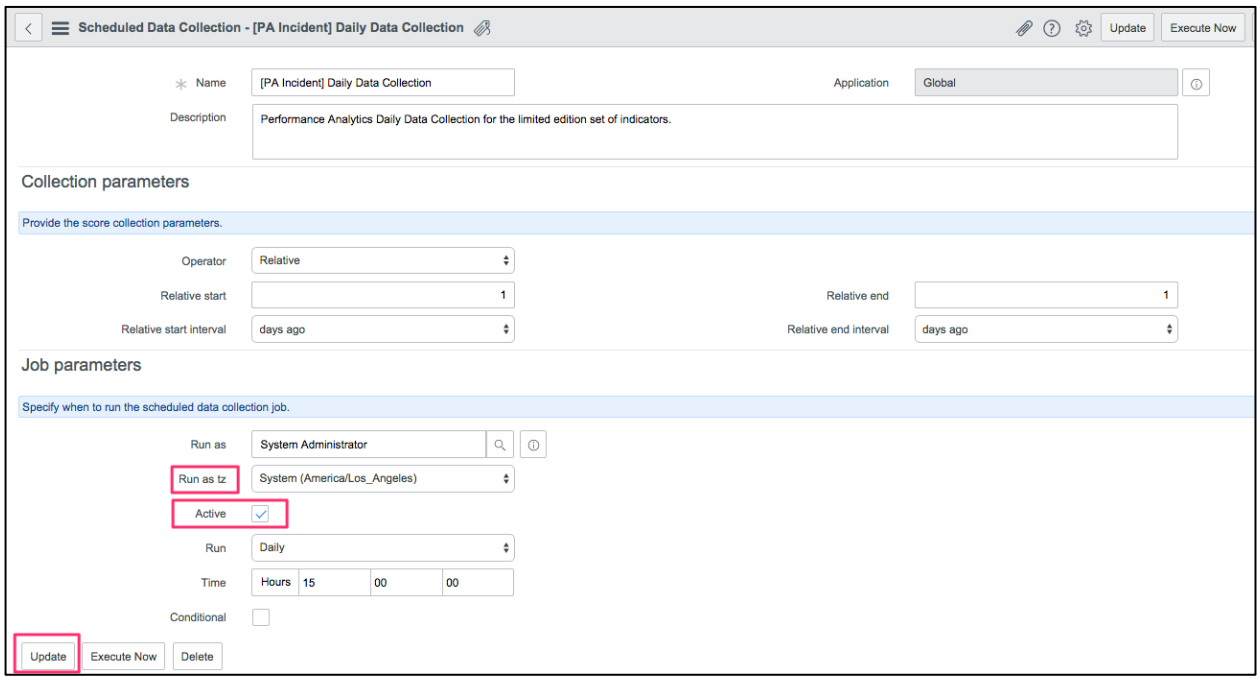
1. Navigate to **Performance Analytics > Jobs**.



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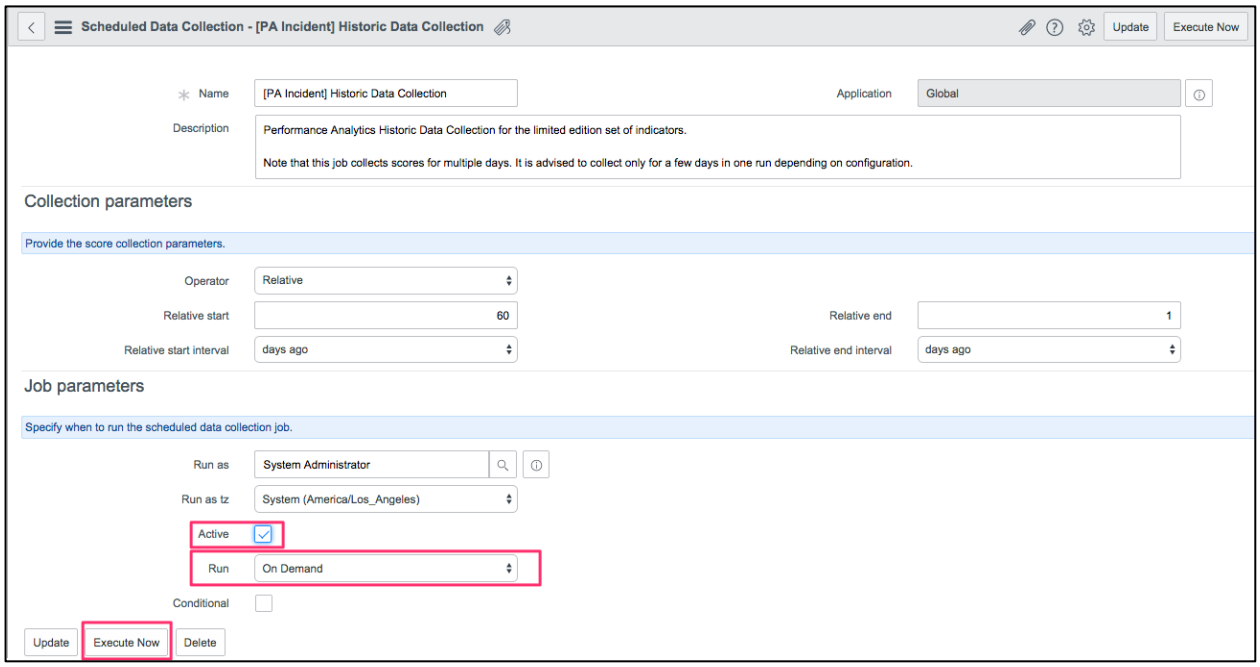
2. Find the two data collection jobs. Click the **Name** of each job and check the **Activate** box. You can also set your time zone by changing **Run as tz** for the Historical Data Collection Job.



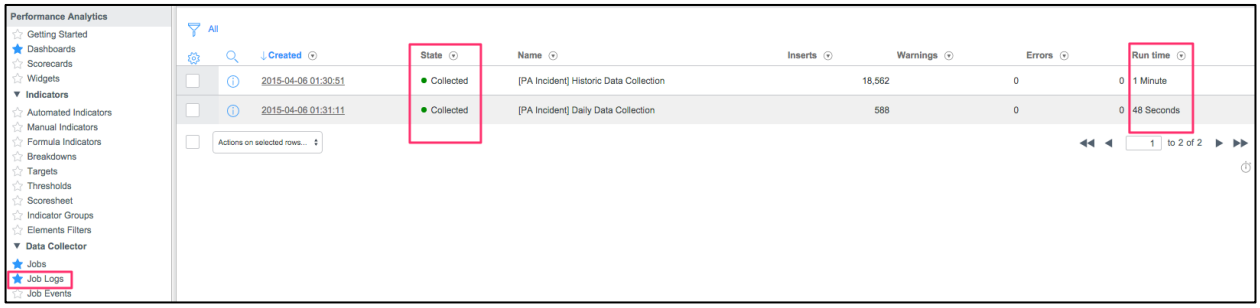


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3. For the Historical Data Collection Job, select **Execute Now** since this is an **On Demand** schedule**.**



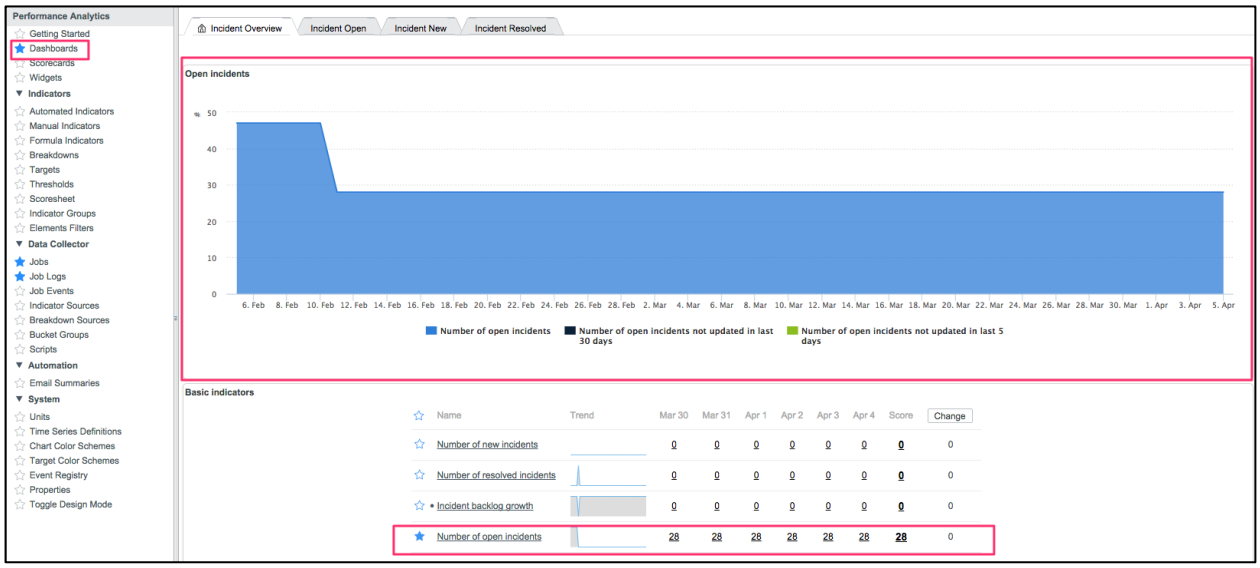
4. After you activate both scheduled jobs, navigate to Job Logs to see status of the collection. This takes a few minutes to run. Notice the run times on the far right once it is done collecting.



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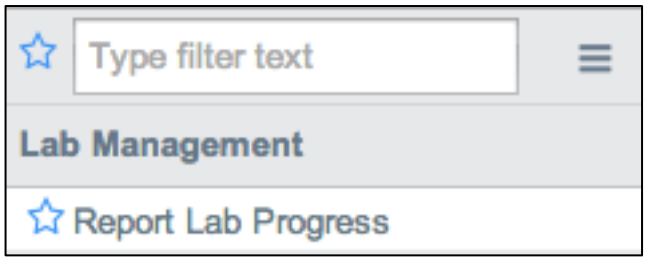
Lab Success Verification

1. To see the collected data on a dashboard, click **Dashboards**.

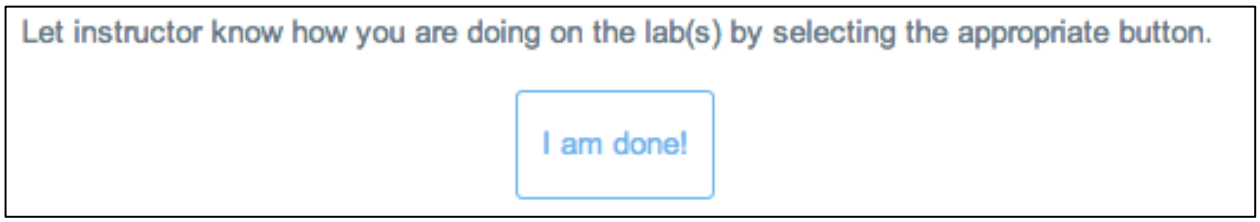


Progress Report

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



2. Click **I am done!**



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