Lab Guide

Reporting Essentials 101

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Default Login / Password

joey.incident / Knowledge17

Lab Sponsored by Microsoft Azure



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Lab Goal

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

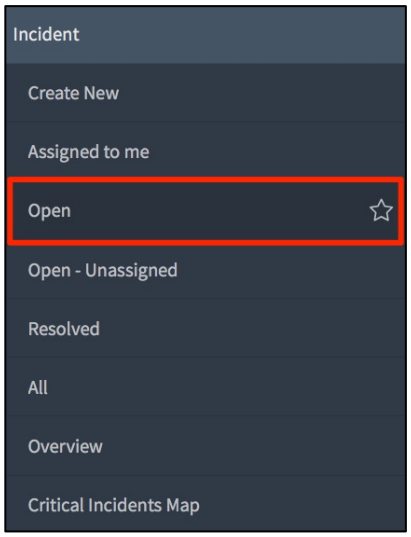
[Use Case]: Joey is head of Incident control. His job is to create an insight into the incident health of the company. He creates and shares meaningful and actionable incident reports and dashboards with the applicable groups. He searches for potential service and process risks within the company and visualizes these through different dashboards. In this first lab he works with data and filters in normal platform list views.

Lab 1.0 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 user credentials from the cover of this guide. (**joey.incident / Knowledge17** – case-sensitive password)

2. Navigate to **Incident > Open** from the left side menu. If you type **Incident** in the **Filter Navigator** box above the menu it automatically filters to this menu.



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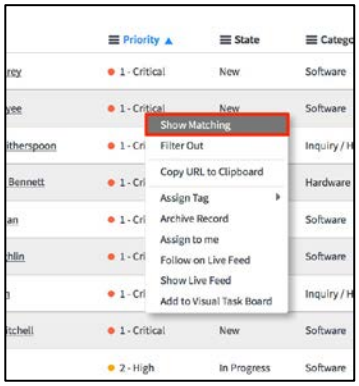
Filter List Data

1. Click the column header called Priority to apply a sort of the data grid according to this field. **Note**: Click on the word, not the icon next to it.

   This is to show 1-Critical on top of the list. If it's already sorted by priority with critical being the highest, you don't have to do anything.



2. Right-click on one of the fields containing the value of Priority=**1-Critical**, and select the Show Matching option.



   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.

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3. Expand the list filter by clicking the filter button at the left of the breadcrumb trail to open up the filter options.



4. Joey also wants to exclude all incidents from the list that are currently already work in progress. For this list, he just wants to focus on the incidents that have a critical priority, but still on the "New" state to follow up with the team to discover why they aren't in progress yet.

   Add the following condition to the Condition filters:

   + AND + State + is + New



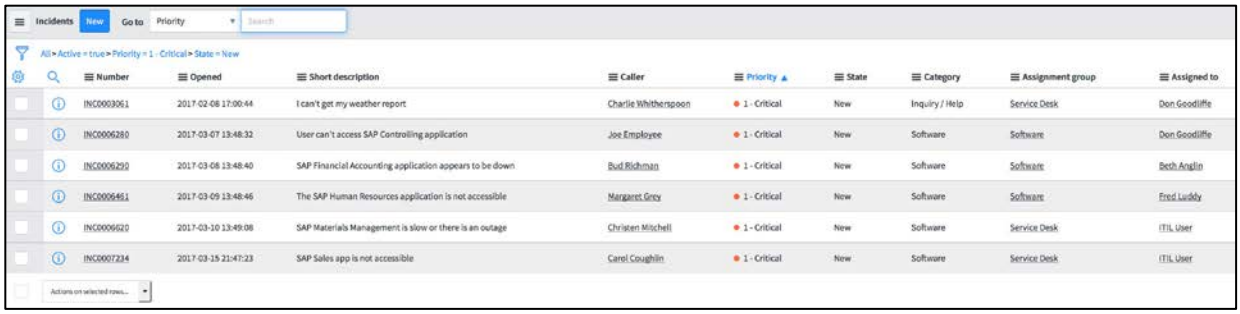
   Note: As in Step 2, with the Show matching function, you can add or remove filters using the Conditions filters.

5. Click **Run**.

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Lab Success Verification

1. Your screen should look like the example below.



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Lab Challenge 1 – Save as a Personal Filter

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



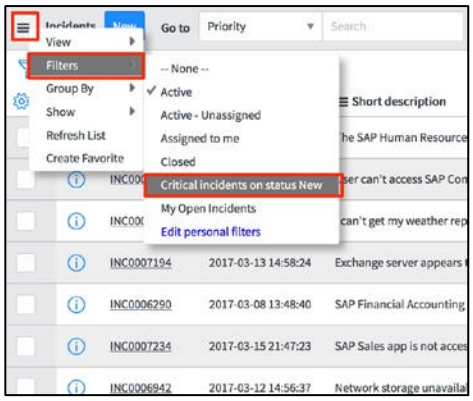
2. Click the **Save...** button to open the **Save as** panel, then enter **Critical incidents on status New** as the filter name. Click **Save**.



Lab Success Verification

1. Navigate to **Incident > Open** from the menu again.

2. Click the **Hamburger** icon (3 horizontal bars) at the top left of the list window and select **Filters > Critical incidents on status New** (the one you just created).

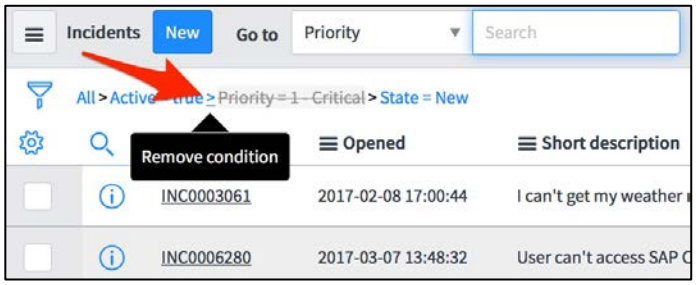


The view should refresh again and recreate the view that you created manually before. You can create and manage your own personal filters for specific data sets that you might use regularly.

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Lab Challenge 2 – Removing Breadcrumb Selections

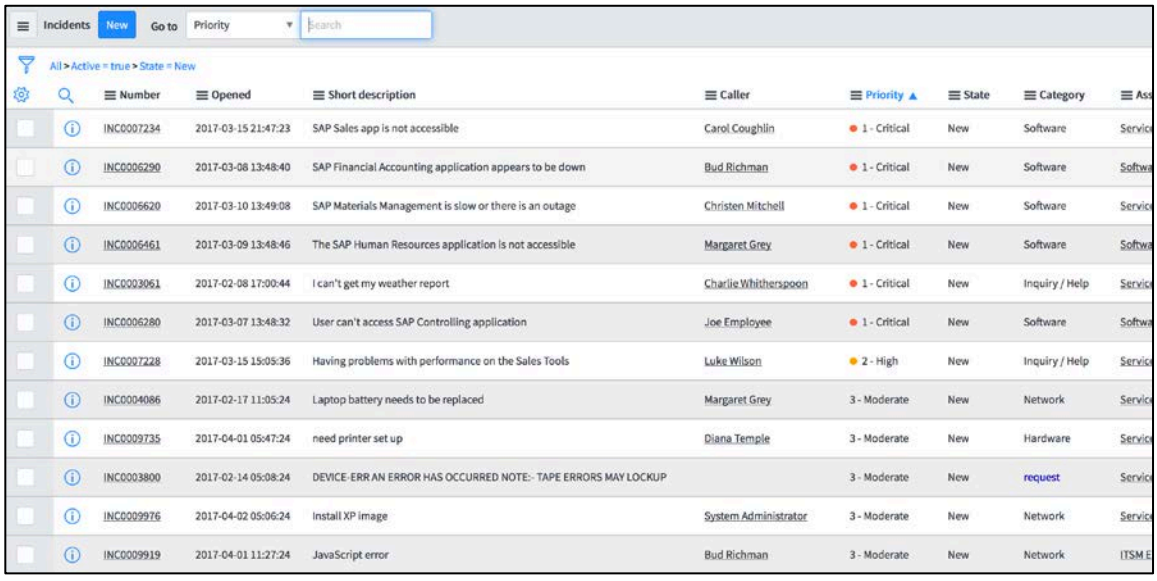
1. Hover the mouse over the **>** icon at the left of the **Priority 1 – Critical** breadcrumb so that it appears with a strikeout line through the item. Click the **>** icon when it is "~~in this state~~" to remove that specific part of the filter.



Note: Do **not** click on the **Priority 1 – Critical** item itself 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

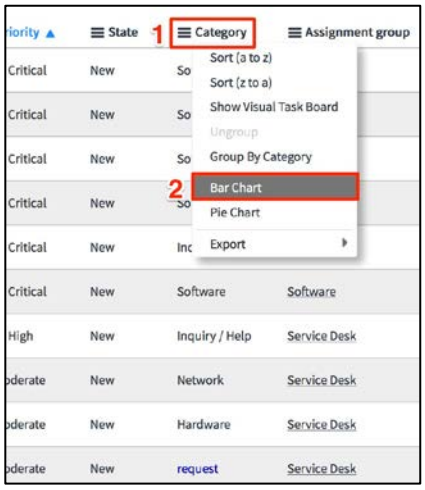
1. Check that the list view now shows **all** Priority values, but is still filtering **state = New** option.



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Lab Challenge 3 – Convert the List Data into a Graph/Chart

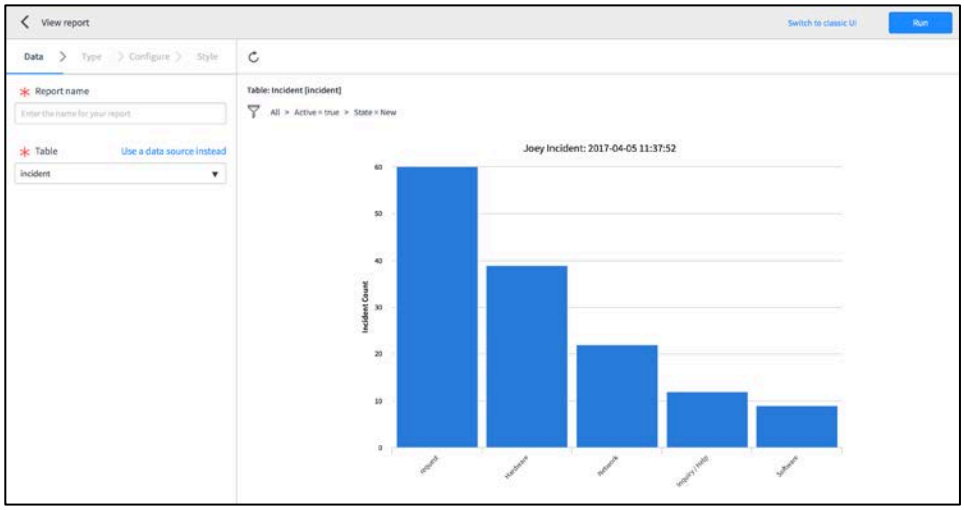
1. Click the **Hamburger** icon next to the **Category** column header (or right-click directly on the column name) and select the option **Bar Chart**.



Lab Success Verification

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

   Note: You are now in the **Report Designer** module. Our guided workflow for Report creation. 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.



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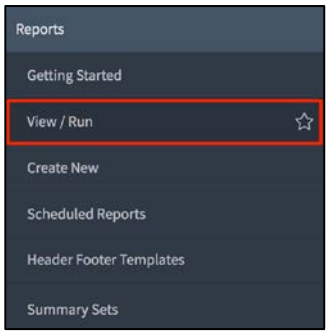
Lab Goal

Lab 2.0 Modify an Existing Report

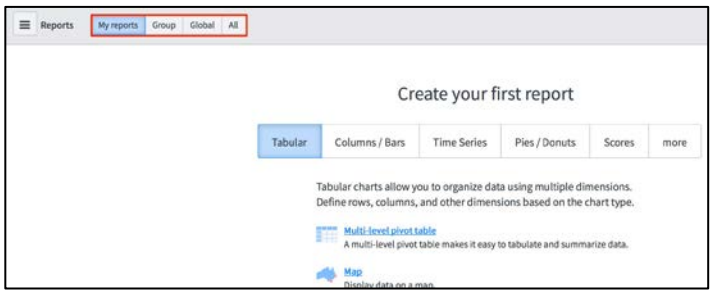
This lab explains how to leverage an existing report and modify it to suit your needs. It can also help you understand some of the report navigation in Report Home and searching functions included in the Geneva, Helsinki and Istanbul release. After opening an existing report, it will start the new Report Designer. With the use of the "Switch to classic UI" it moves to the old Report builder UI that was used in previous releases.

[Use Case]: Joey needs to create a report to have a meaningful insight into the current open incidents per assignment group. As he can use this information to identify possible risks with the open incident load per group. If possible even with information on priority of these incidents. Instead of creating a new report, he decides to modify an existing report. As this one is too generic and not being used anymore.

1. Navigate to **Reports > View / Run**. If you type **Reports** in the **Filter Navigator** box above the menu it automatically filters to this menu.



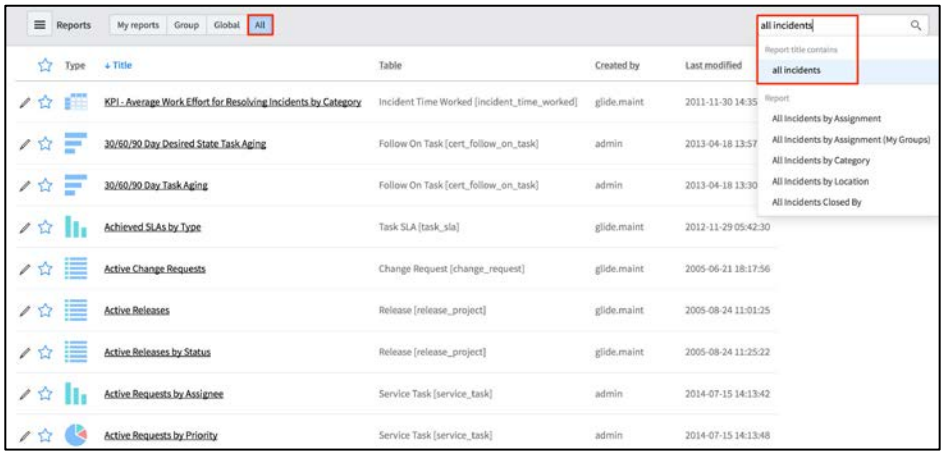
2. You will move to your default **My Reports** home page. Since you have not created any reports yet, nothing is showing here so you are prompted to create a new one. You can, however, access existing reports that are shared with you using the buttons highlighted below:



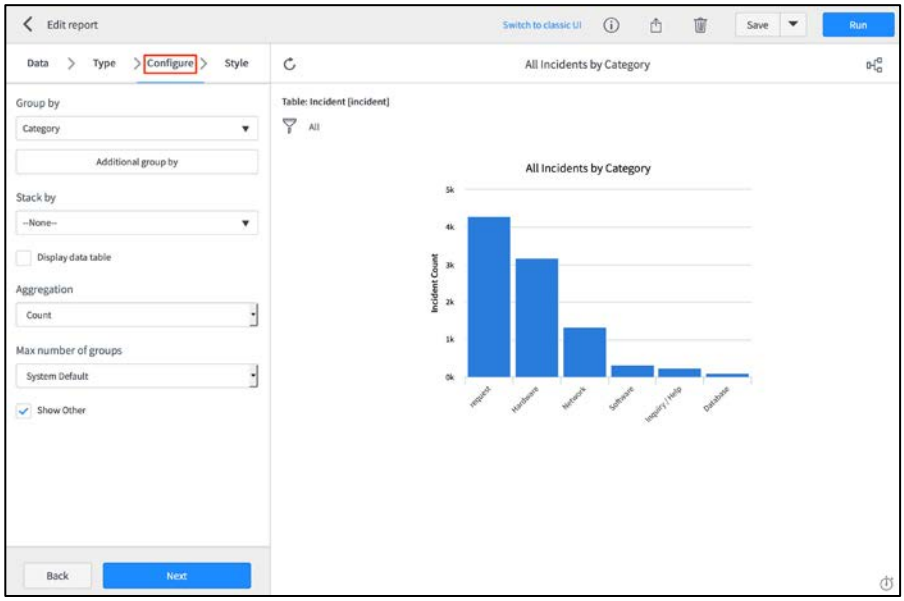
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3. Click the **All** button.

4. Search for a report, using the search function at the top-right of the window. Type **All Incidents** into the search box and press **Enter**. (The filter defaults to the *Title Contains* option.)



5. Click the **All Incidents by Category** report title. This opens a report, a bar chart grouped by category of the incident, a similar report to what you saw at the end of the previous lab.



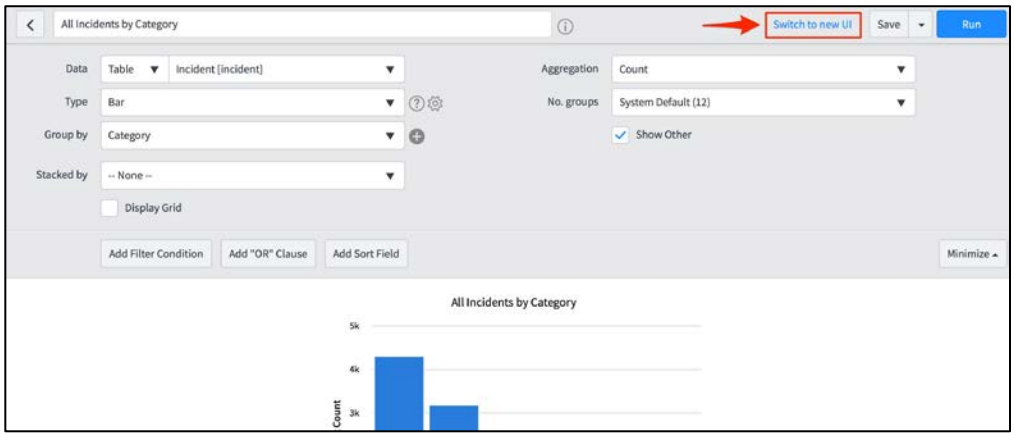
Note: Notice that when you open an existing report in the new report designer workflow, this will by default bring you to the 3rd step (tab) “Configure”.

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6. You are now in the Report Designer, the new user interface for report creation. **Click** the **Switch to classic UI** link in the header of the Report Designer to switch to the old report builder (Geneva / Helsinki).

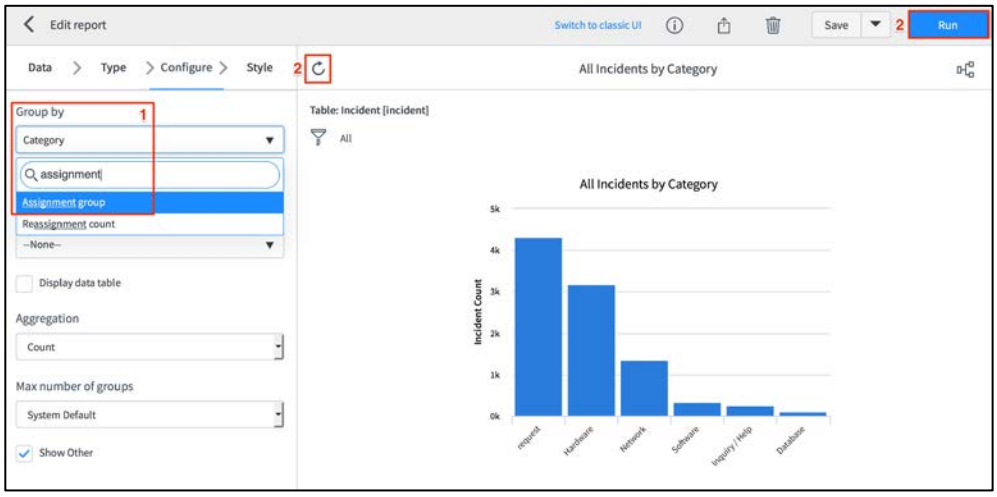


7. You are now in the old report builder interface. The default report creator that was used in previous releases. Now switch back to the new and improved UI. **Click** the **Switch to new UI** link in the header of the Report Builder to switch to the new interface.



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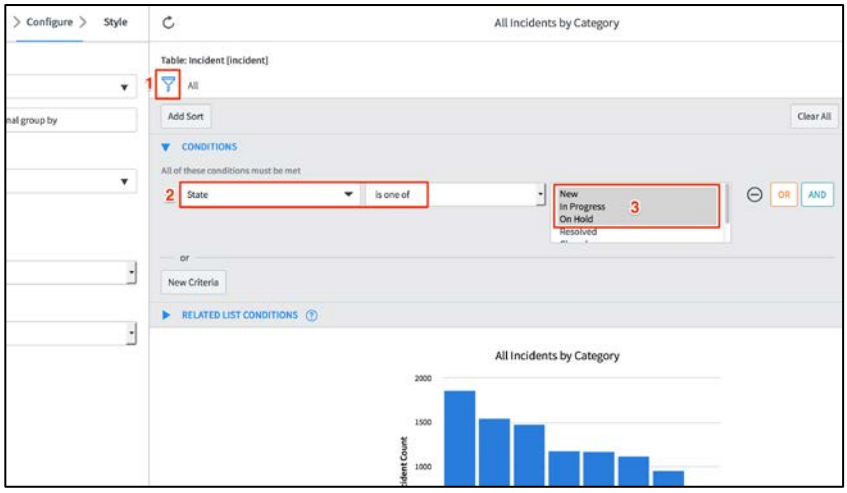
8. Within the Report Designer, change the **Group By** from Category to **Assignment Group**. To find the value more quickly, filter the values shown in the dropdown list by typing the characters "Assignment group" into the search box that appears at the top of the list. Select this grouping and **Click** the blue **Run** button or **refresh** icon to immediately see the result of your changes.



9. Within the Report Designer, **click** the condition builder (filter icon). In the first row create the filter condition:

   State + is one of + New & In Progress & On Hold

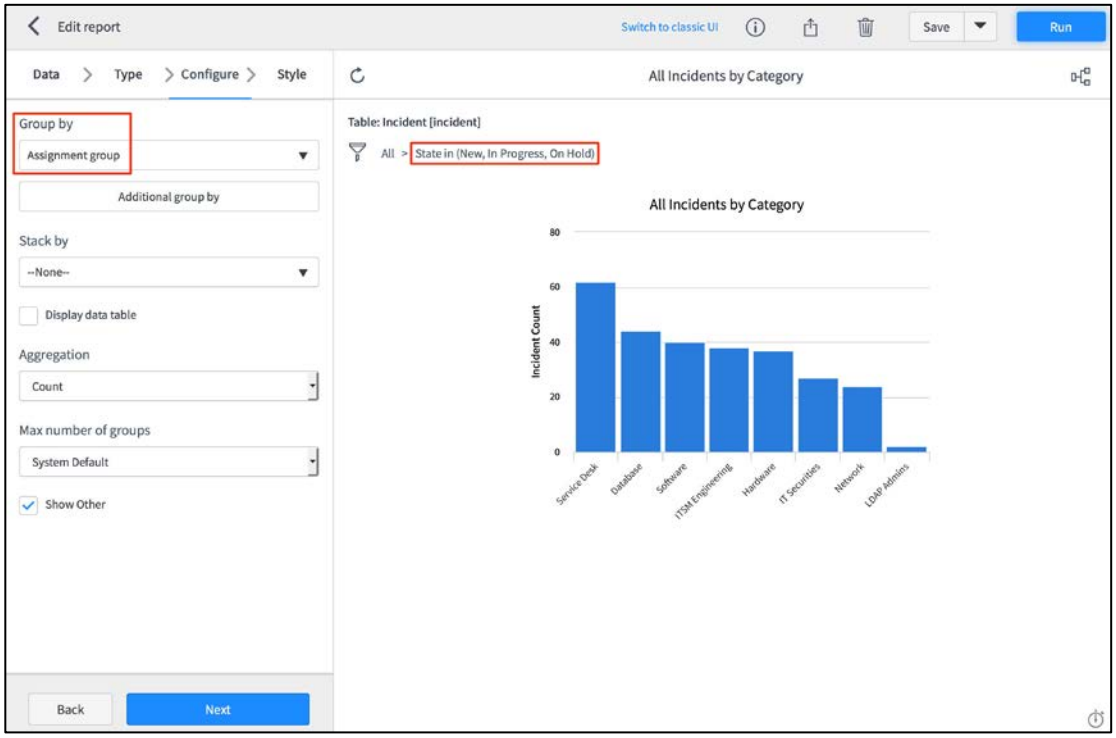
   Note: Use the Command (Mac) or Control (PC) key to multi-select.



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Lab Success Verification

1. Close the Condition builder by **clicking** the filter or cross icon and re-run the report (by using the Run button or refresh icon). You should see a report similar to the one below. The report should look like the example below:

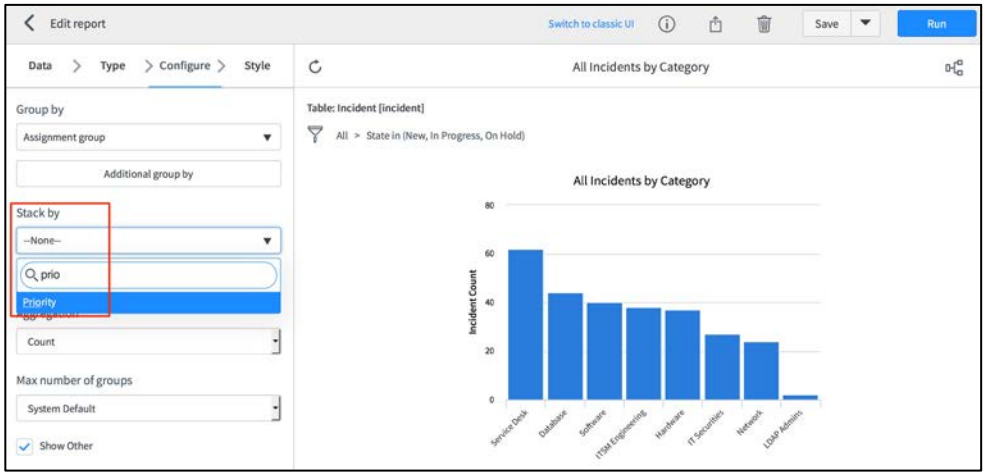


Note: We modified this report to visualize a different point of view and to make it meaningful and actionable for this specific use case. “All Incidents by Category” lists reports by assignment group where they are currently in an open state. In a later lab we will highlight the renaming, saving, or sharing of a report.

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Lab Challenge – Using Stacked by options

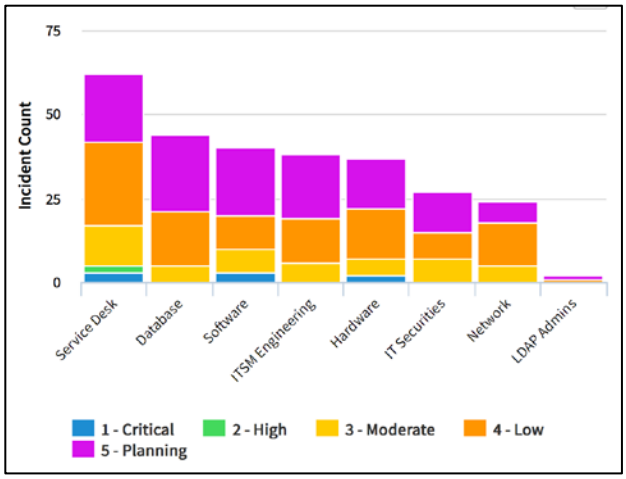
1. The previous lab does not provide the context (yet) of the priority level of those incidents. Next we will explore a technique to help build a context for the incident priorities per assignment group. Within the Report Designer, set the 'Stacked By' field to **Priority**. Re-run the report by clicking Run.



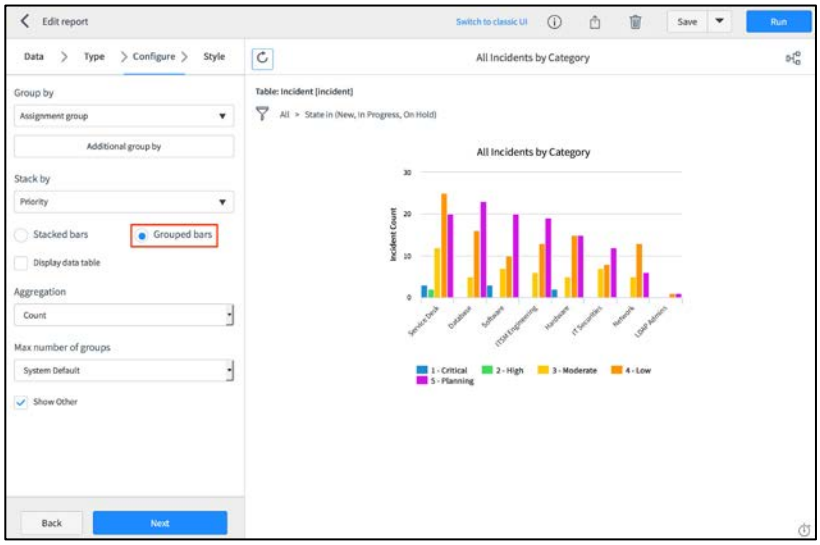
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Lab Success Verification

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



2. There is also a Stacked by option for Grouped bars (side by side instead of vertical stacking), depending on the kind of representation you need. **Click** the Grouped bars radio button and run/refresh the report again.



Note: To make the report/chart even more powerful, you can click the Priorities mentioned in the legend of the chart. For example, **click** on 5-Planning and 4-Low to interactively exclude them from the visualization.

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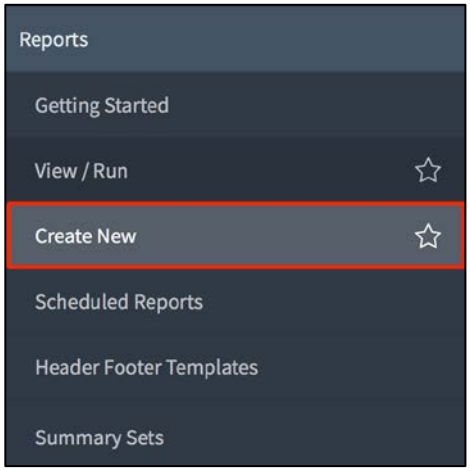
Lab Goal

Lab 3.0
Create a new List Report

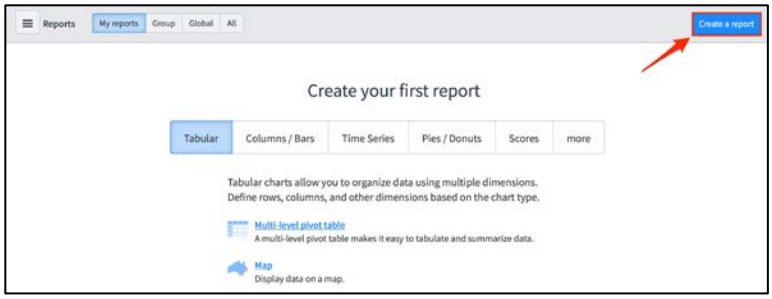
This lab explains how to create a new List Report when it is not possible to modify an existing report to fulfill specific needs. We will be using the new Report Designer for it.

[Use Case]: Joey needs to provide a list overview of configuration items in his company that are waiting for a change. Additionally, he even wants to visualize only those configuration items that are owned by his colleague Jerrod Bennett.

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



Note: You can create reports from multiple places. From platform lists, from an empty placeholder report widget on a dashboard, or from the View/Run report list, using the **Create a report** button at the top-right.



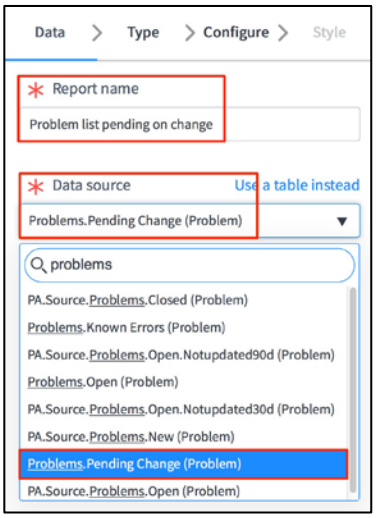
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2. Again, we are in the new Report Designer, but since we are creating a new report, everything is empty. We'll start with the first step/tab, where we set the data.

   Within the Report Designer, complete the following:

   a. On the Data step/tab, type in Report name: **Problem list pending on change**

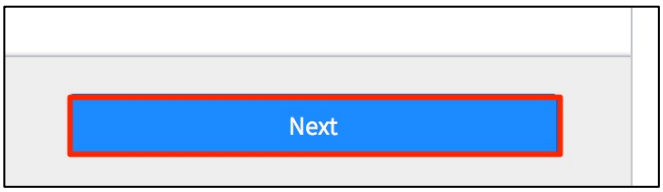
      Open the Data source dropdown and select the data source "**Problem.Pending Change (Problem)**". To quickly find the value, filter the list shown in the dropdown by typing the characters into the search box that appears at the top of the list.



Note: After you select the data source, the data itself is automatically loaded. You can see it appear at the right.

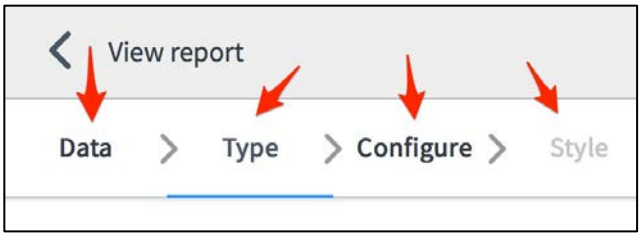
Note: Also notice that an information notification could appear to the right, mentioning that there is already 1 report using that same data source. This is to prevent users from creating duplicate reports.

Then **click** the Next button to go to the next step.



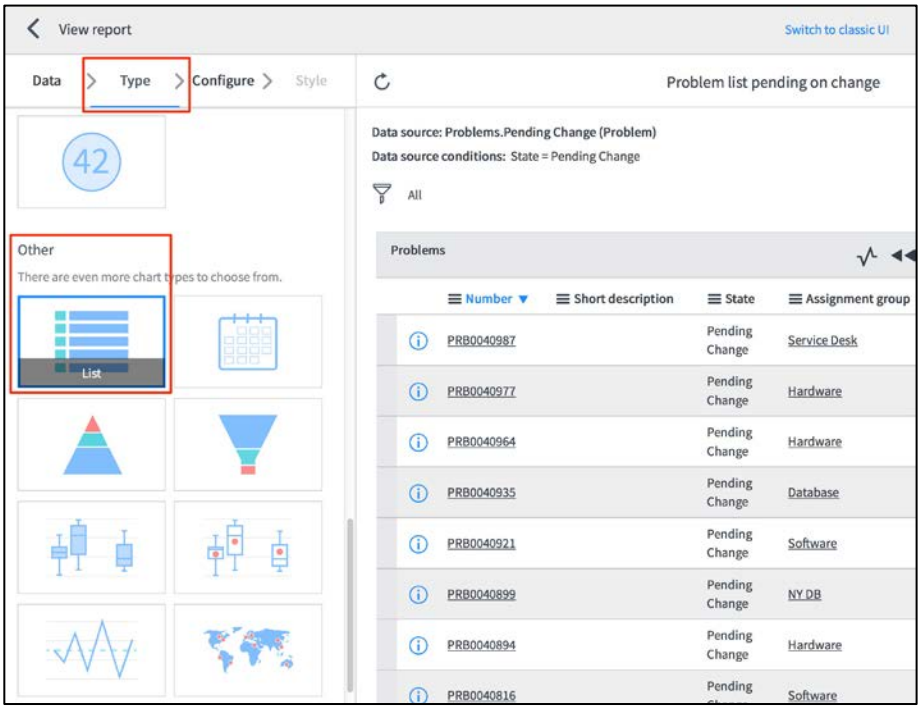
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Note: You can always move through the guided workflow using the Next and Back buttons, but you can also use the tabs in the upper area of the guided workflow.



b. On the Type step, we select the type of visualization we need for our data. This helps make the data powerful, meaningful, and actionable, and to provide insight where data turns into information for the viewer. All visualizations are grouped by their category.

Select the List report from the "Other" category. And click **Next**, or use the tabbing.

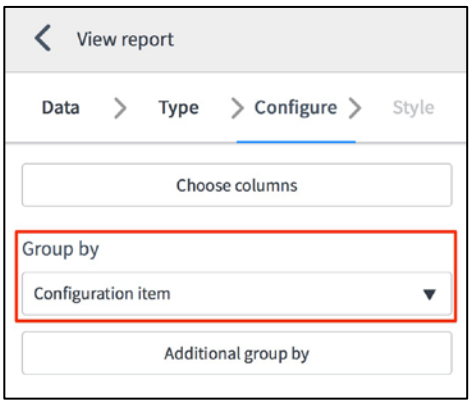


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c. We are at the **Configure** step. By default, this groups the report by the first grouping available, for example Active (true or false). **Select** "Configuration Item" from the Group by dropdown.

   On a list report you can also choose the visible columns in this Configure step. In this lab we will only use the current columns.

   Click Run or the refresh icon to stay in this step but to refresh the data.



d. The Style step is not applicable; this is because we are using a list visualization which does not have additional styling capabilities.

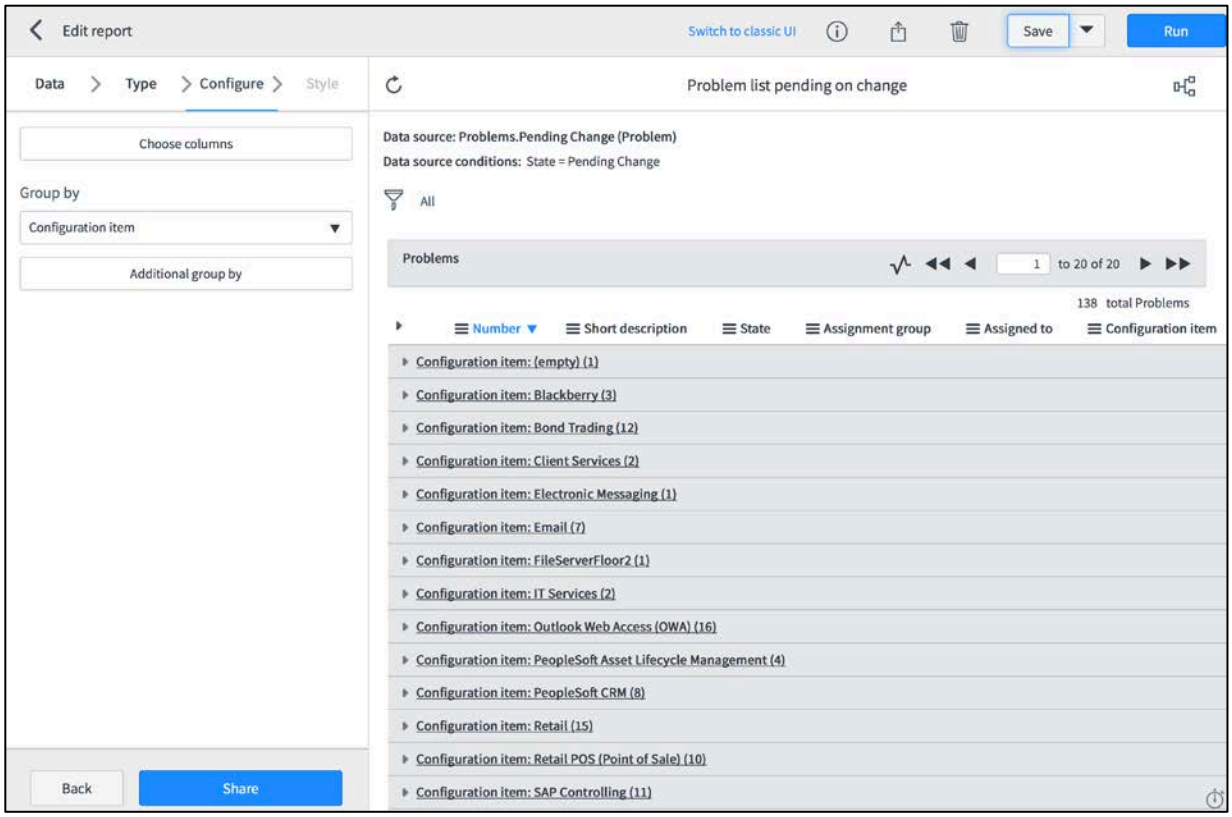
e. The last step of our guided report creation workflow is to share it. Either as a widget on a dashboard, export, or to another user/group. We will explore Sharing capability in a later lab. Click the **Save** button to save our grouped list report.



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Lab Success Verification

1. The report should look like the example below:

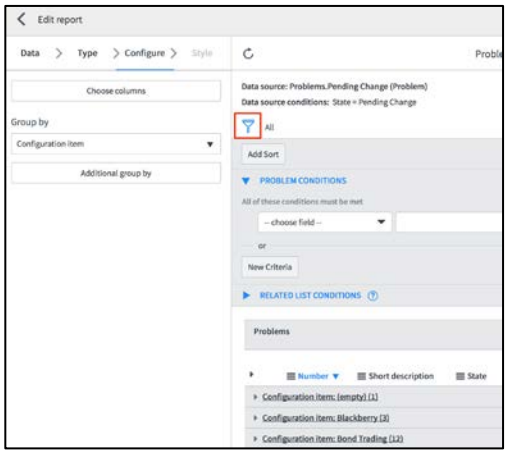


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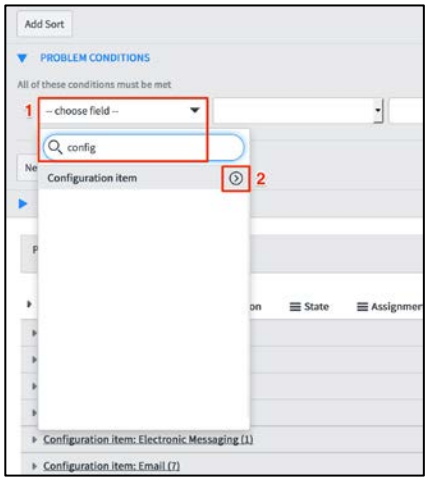
Lab Challenge – Filter on information beyond the base table

ServiceNow allows a concept called dot-walking, which allows information that is stored in a related table to be shown on the report or used as a filter or grouping for the report. We will explore this concept by only showing those Configuration Items owned by Jerrod Bennett.

1. **Click** the Filter icon to open the condition builder.

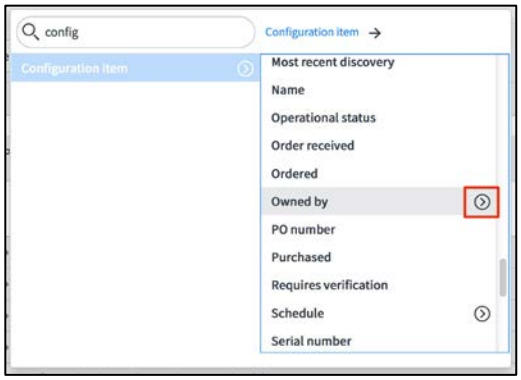


2. **Select** "Configuration item" from the dropdown. Remember, to find the value more quickly, filter the list shown in the dropdown by typing the characters into the search box that appears at the top of the list. Do not select Configuration Item but **click** the right arrow.



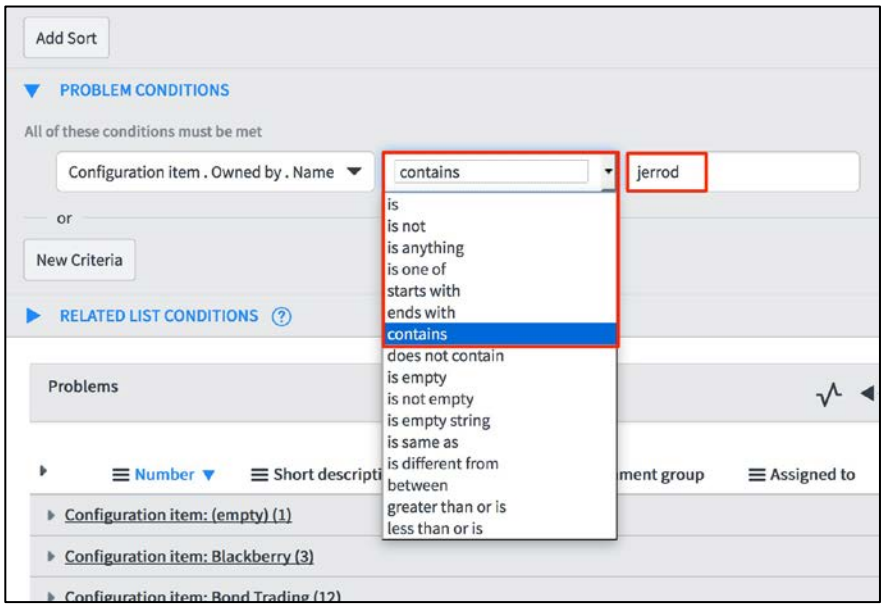
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3. We are now one level deeper. **Scroll down** to the "Owned by" and again **click** the right arrow next to it.



4. We are another level deeper. **Scroll down** to the "Name" and this time **click** Name. **Change** the second field dropdown from "Is" to "Contains" and **Type** "Jerrod" in the third field.

   When the conditions are set, you can **click** the filter icon to close the condition builder.

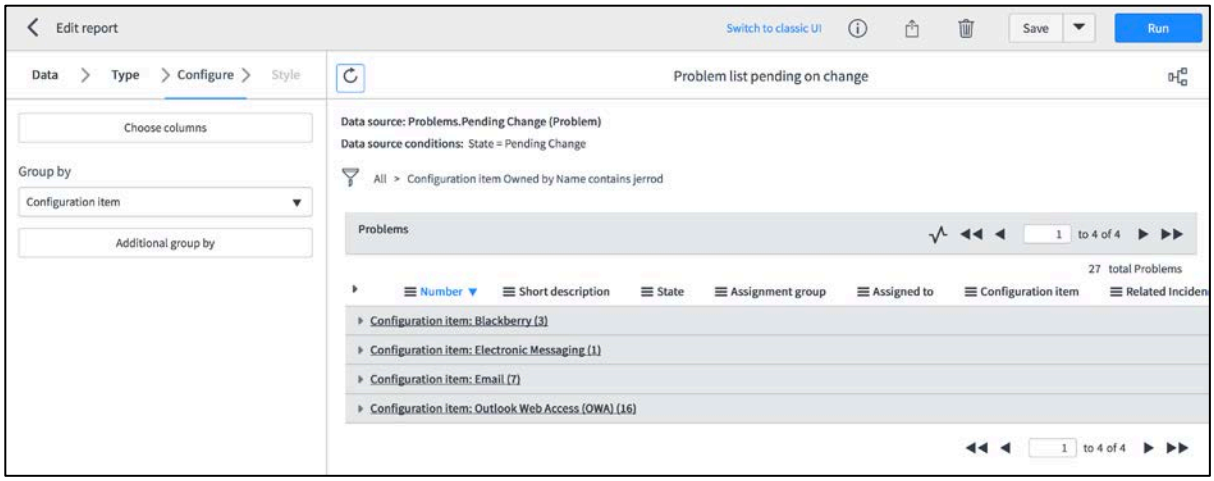


5. **Click** the Run button or refresh icon to see the results.

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Lab Success Verification

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



Note: We do not need to save or share this report. We will do this in later labs.

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Lab Goal

Lab 4.0
Create a new Donut chart

This lab explains how to create a graphical report using the Donut 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. Donut and semi-donut charts are useful when comparing the size of parts to the whole. They are similar to pie charts, but the donut chart has empty space in the middle, where information(like the total value) can be displayed. Donut and semi-donut charts can be placed on homepages where users can quickly interpret the information displayed.

[Use Case]: Joey's new goal is to create a report that can act as a widget on a dashboard. It should be meaningful to the users and provide immediate insight on open incidents with a certain priority. At any time, there are open incidents of different priority levels. The organization may have a policy stating that P1 incidents can never exceed 40% of all open incidents. With a donut or semi-donut chart, you can quickly see if incident counts are within acceptable ranges.

1. Navigate to **Reports > Create New**.
2. Within the Report Designer, complete the following:
    a. On the Data step/tab, type in Report name: **Incidents priority**

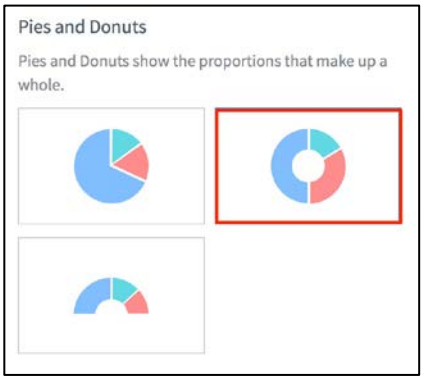
    Click the "Use a table instead" link to switch to the Table list. **Open** the Table dropdown and **select** "Incident".



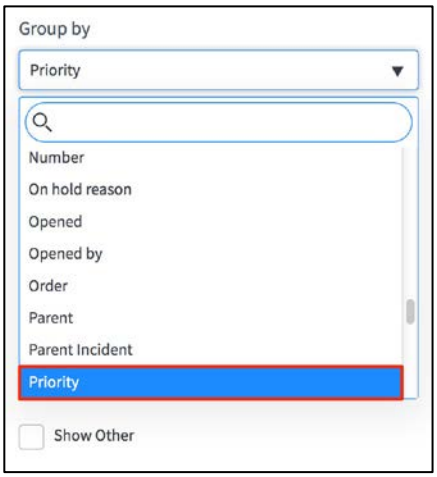
    Click **Next** to navigate to the Type step.

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b. Within the Type step, **Select** the donut in the Pies and Donuts category. And **Click** Next.



c. Within the Configure step, **Open** the Group by dropdown and select “Priority”. And **click** Next.



d. Within the Style step, set the following fields:

   I. Donut width: **30**

   II. Show total and hide legend: Toggle **ON**

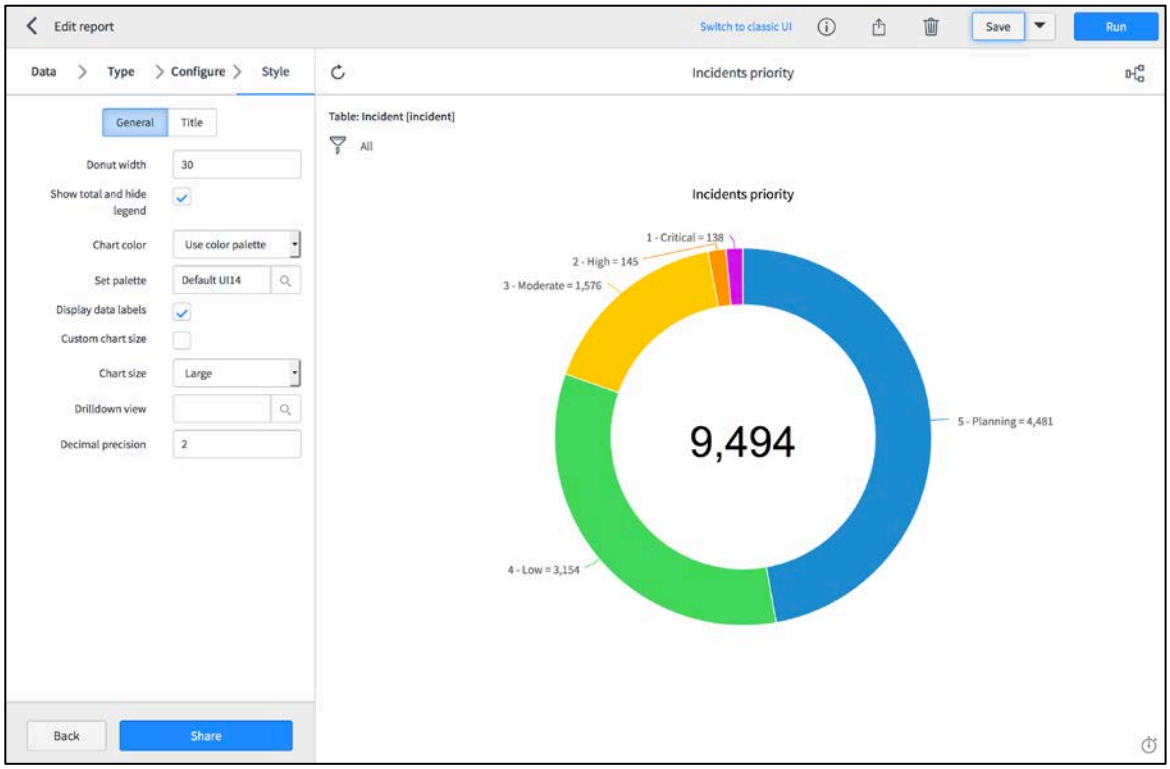
   III. Display data labels: Toggle **ON**

3. Click the **Save** button, in the upper right, to **Save** the progress.

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Lab Success Verification

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



Note: This report/chart is still very generic; in the additional lab challenges we will provide more meaningful insight.

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Lab Challenge 1 – Make a join relation to another table's condition

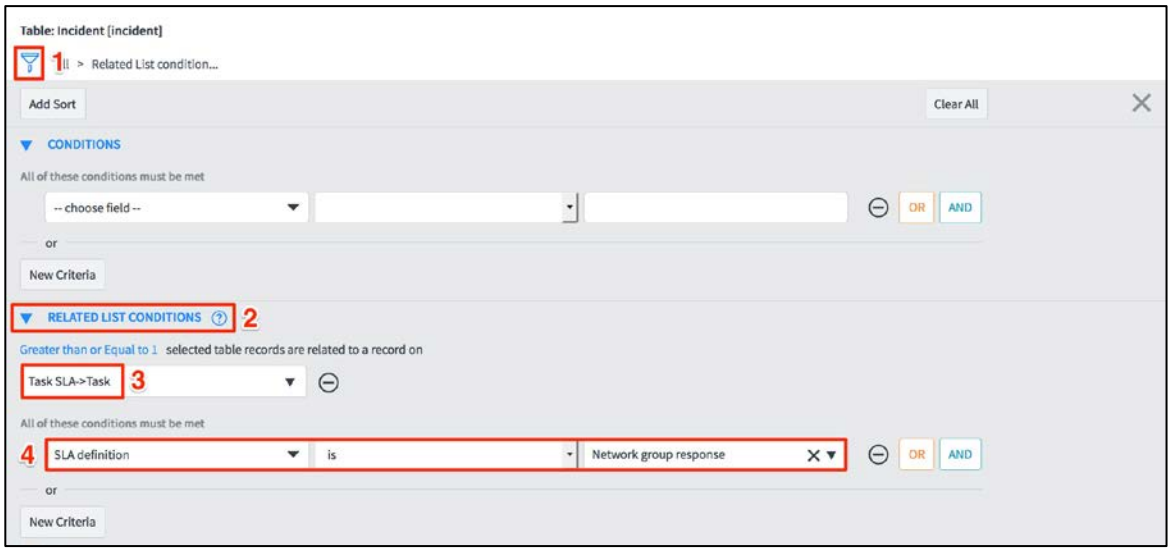
[Use case]: Joey wants to dig deeper into the incident donut. To visualize only those incidents that have a related condition for service level agreements with a definition as "Network group response". For this we are going to use the related list conditions in our filter condition builder.

1. Open the condition builder by clicking the Filter icon.
2. Open the Related List Condition dropdown and set the following Related List Conditions:

   Table: **Task SLA->Task**

   With the following conditions:

   SLA definition + is + Network group response



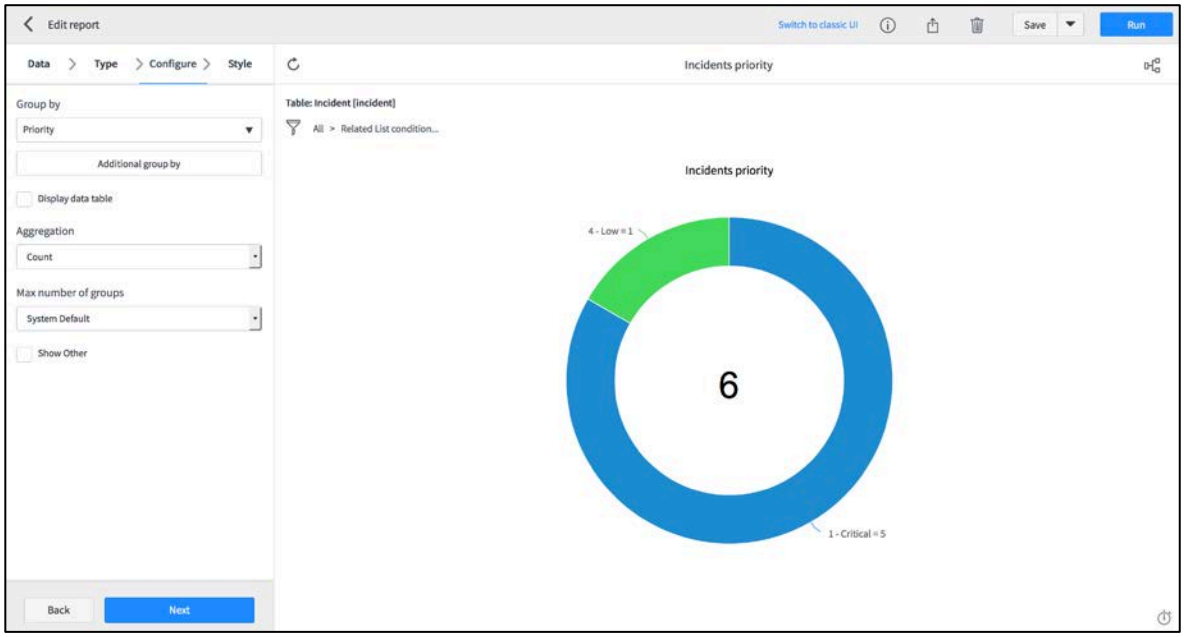
Note: With this condition we are making the chart more meaningful. We are only showing the incidents that have a related task service level agreement, which wasn't possible by just setting the priority of the incident as a primary condition.

3. **Close** the filter by clicking the filter icon or cross. And **Click** the run button or refresh icon.

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Lab Success Verification

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

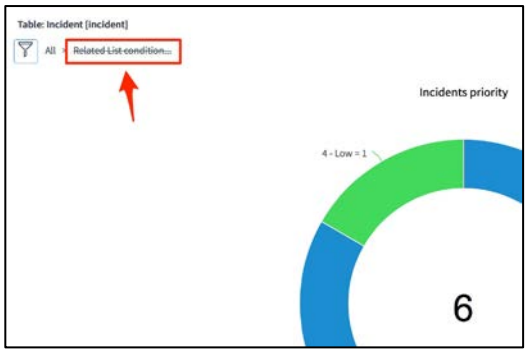


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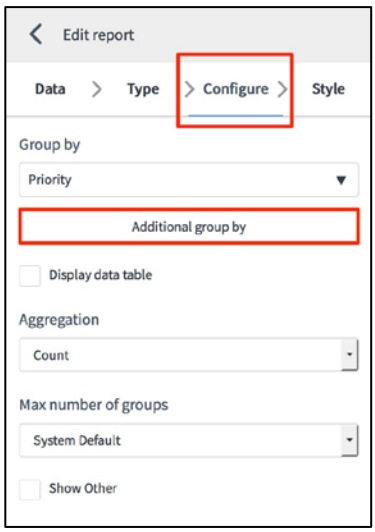
Lab Challenge 2 – Adding Dynamic Grouping Options to the Chart

[Use case]: Joey wants to use additional dynamic grouping options to the donut. You can configure alternative **Group by** choices that users can select when viewing the chart. Additional Group by can be added to any report that supports group by (such as this donut). Additional Group by or Stack by are great ways to visualize other insights within the same visualization chart, without having to make multiple reports.

1. **Remove** the related list condition by clicking on the strike through "~~Related list condition~~" so you will get the full donut with incidents grouped by priority again.

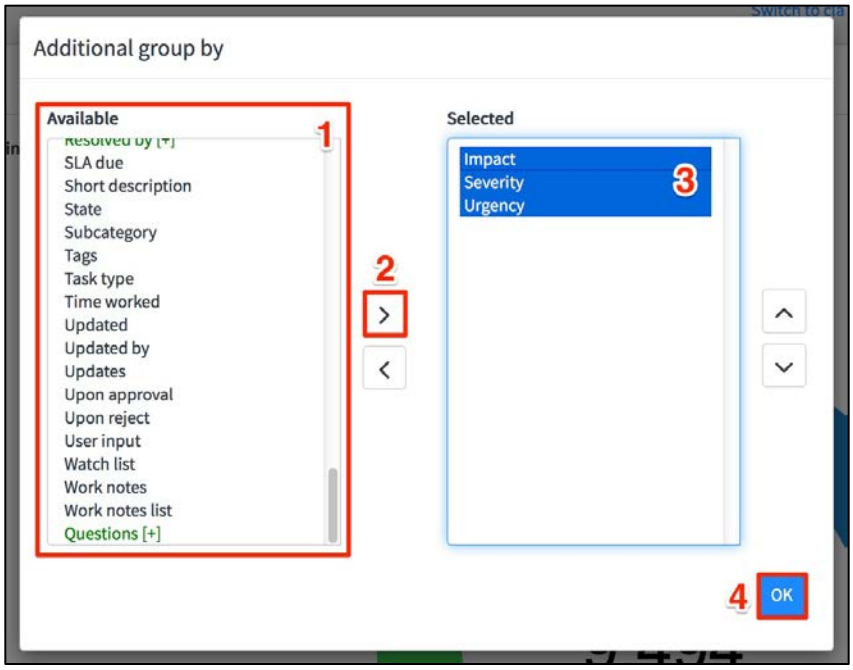


2. In the report designer workflow interface, **Click** the "Additional group by" function.



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3. In the next slush bucket modal, **Select** Impact & Severity & Urgency from the Available list to add them to the Selected. **Click** OK.



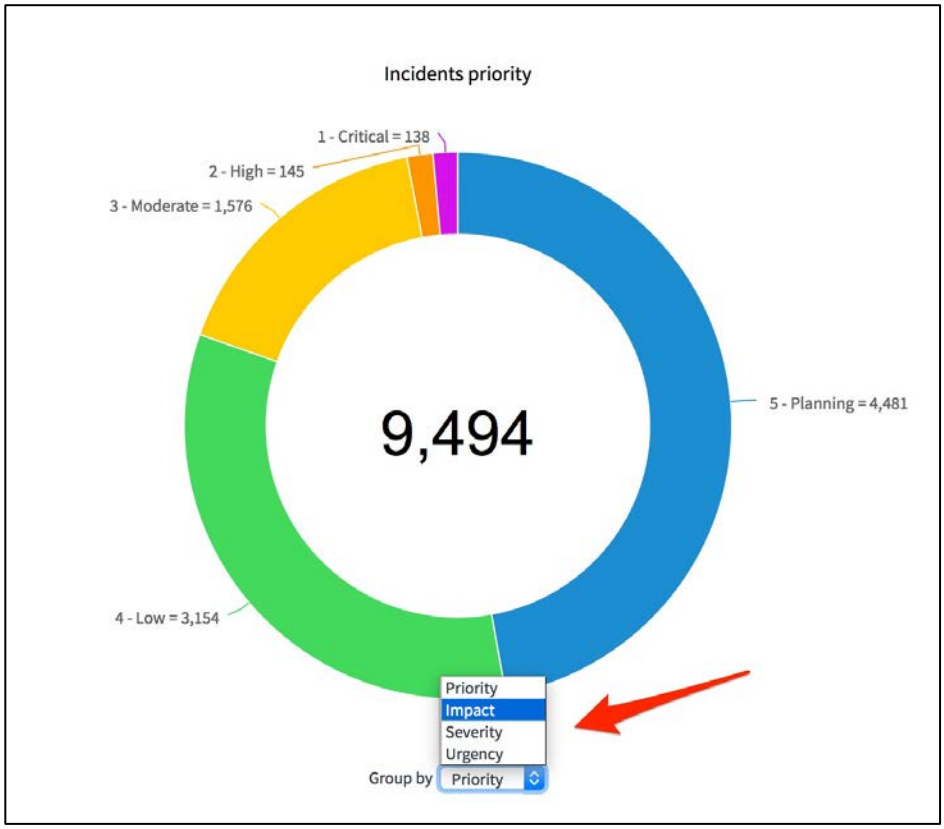
4. **Run** the report.

5. Click the **Save** button to save your progress.

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Lab Success Verification

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



Note: Now that we've added these additional group by, you can select them from the list to interactively change your group by. This works great when the report is used as a widget on a dashboard. In addition to this interactivity it also prevents the need for multiple separate reports.

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Lab Goal

Lab 5.0
Create a time series chart

This lab explains how to create a column chart, which highlights how to visualize time series information. Column reports show how the value of one or more items changes over time.

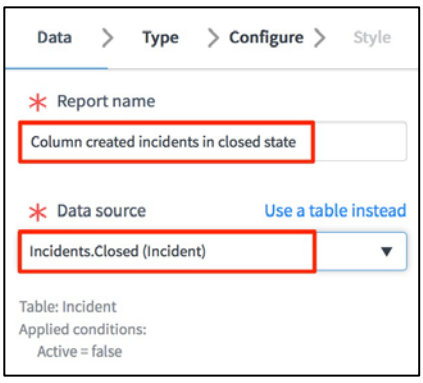
Values along the horizontal axis of the column chart represent the time measurement (e.g., years, hours, minutes, milliseconds, etc.). Values on the vertical axis represent the changes to the items being monitored.

[Use Case]: Joey wants to investigate if there is a relation to type of category incidents and when they are registered. The goal is to have a better overview of when certain teams should be present to resolve the incidents. He will be creating a column time series related chart for this. As a data source he only wants to use incidents that are actually closed in their current state. Because it's a very powerful, meaningful report he will share it with Abel Tuter, who plans resources.

1. Navigate to **Reports > Create New** to create a new report.
2. Within the Report Designer, complete the following:
    a. On the Data step/tab, type in Report name: **Column created incidents in closed state**

    Make sure the guided workflow is on Data Source. If it's showing a dropdown list of tables, please click the "Use a data source instead" link.

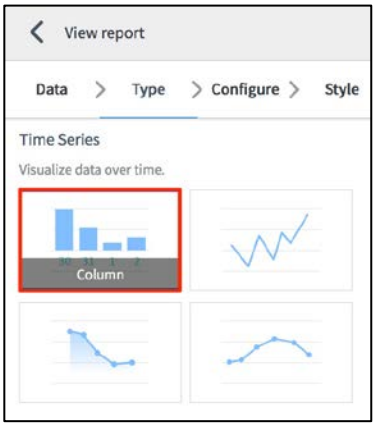
    Open the Data source dropdown and **select** "Incidents.Closed (Incident)".



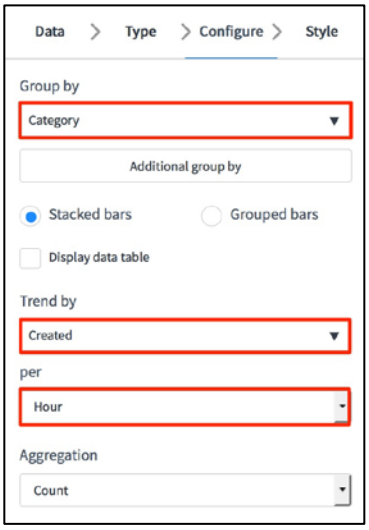
Click **Next** to navigate to the Type step.

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b. Within the Type step, **Select** the Column chart in the Time Series category. **Click** Next.



c. Within the Configure step, **Open** the Group by dropdown and select “Category”. Open the Trendy by and select “Created” per “Hour”. **Click** Next.



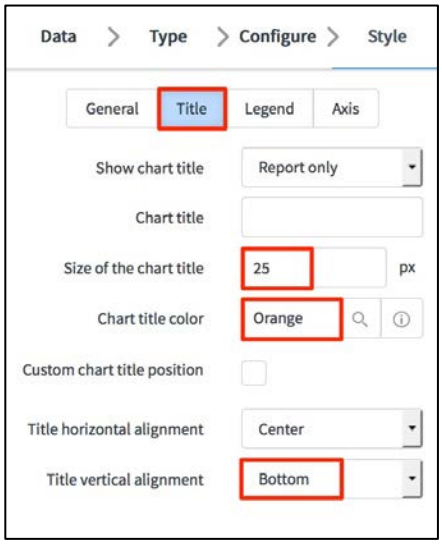
d. Within the Style step, **Click** the **Title** button at the top and set the following settings:

I. Size of the chart title: **25**

II. Chart title color: **Orange**

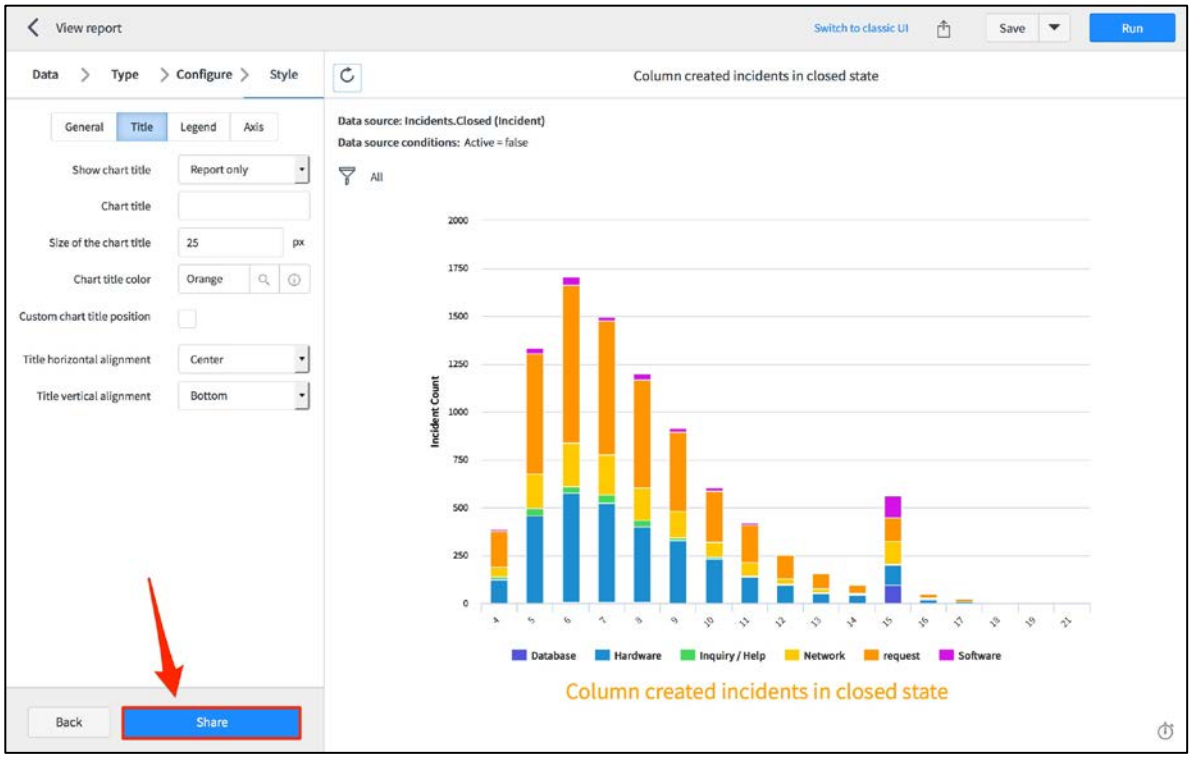
III. Title vertical alignment: **Bottom**

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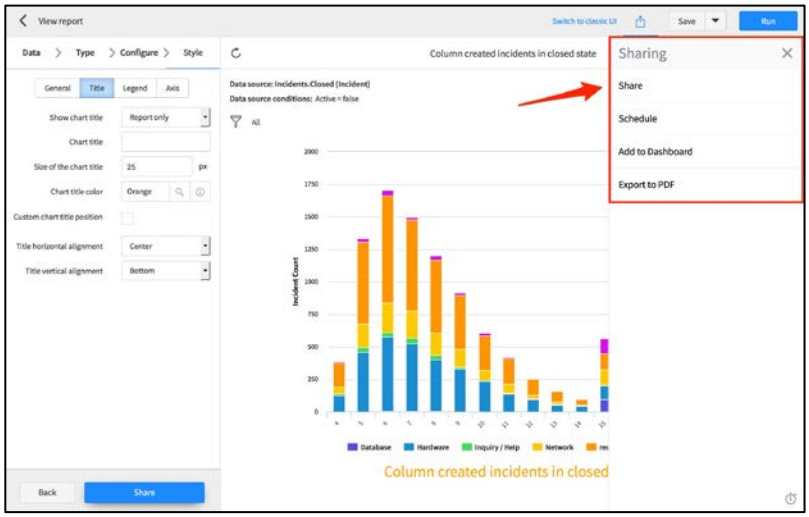
3. **Click** the **Run** button to see the results.

4. **Click** the **Share** button at the bottom of the left side workflow.

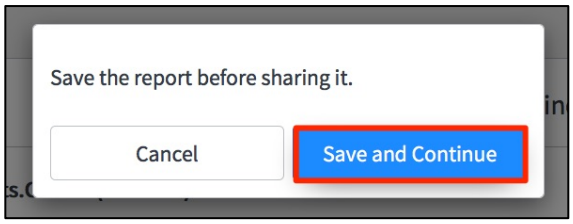


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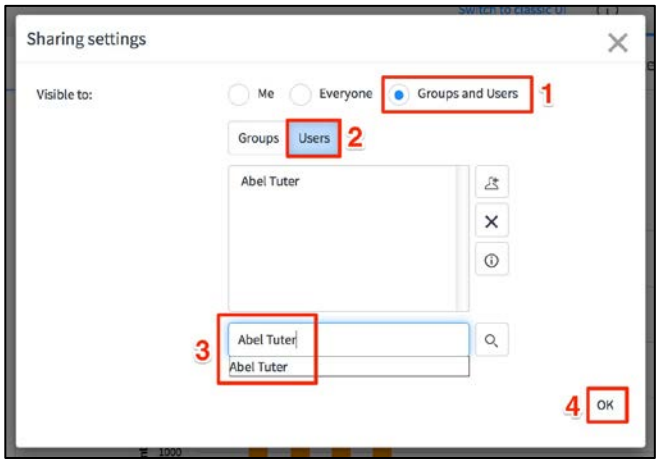
5. This opens up the right side Share panel. Click **Share** to share the report.



6. This will open the Share modal; most likely the report progress hasn't been saved. The system will ask, if applicable, to save and continue. **Click** Save and Continue.



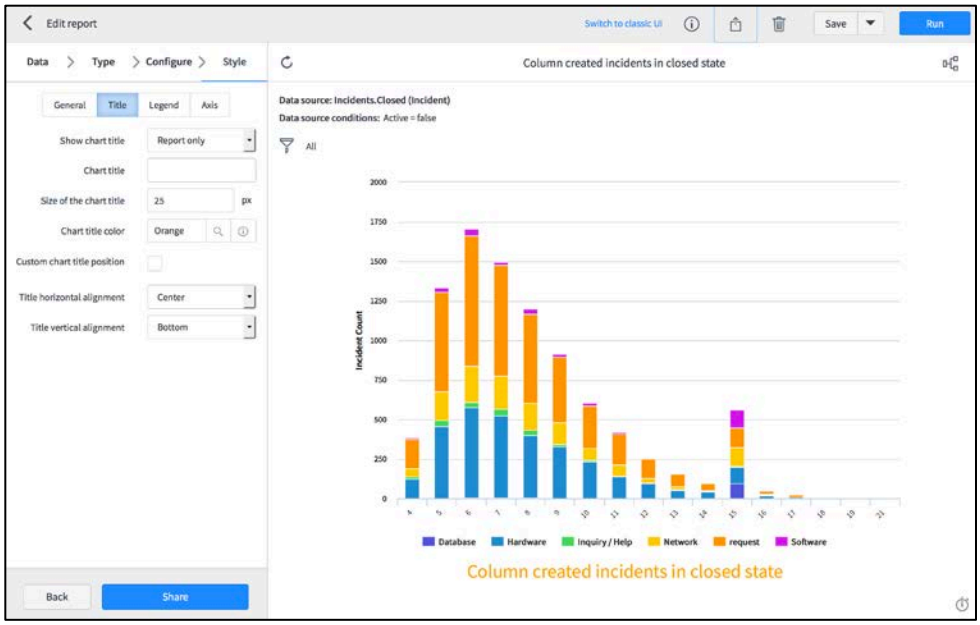
7. **Set** the radio button to "Groups and Users", then **Select** the Users tab, **Add** "Abel Tuter" in the search box below and **Select** him. **Click** OK to share the report.



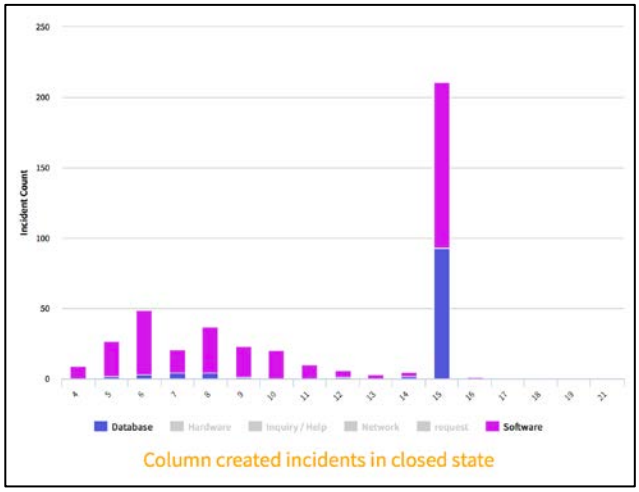
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Lab Success Verification

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



Note: With this chart you can use the interactivity of the legend. For example, Click Hardware, Inquiry/Help, Network and Request to exclude them from the visualization. Notice how your visualization just showed the high peak denoting Database & Software in the afternoon.



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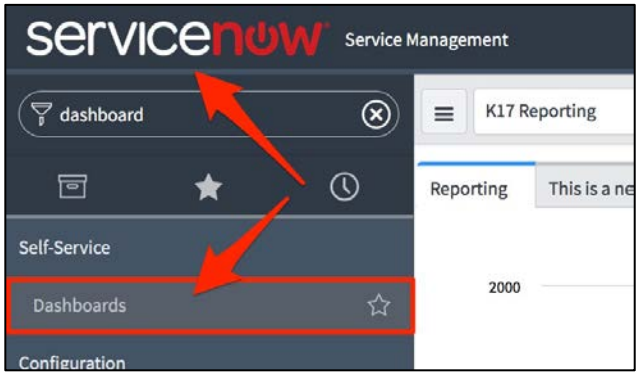
Lab Goal

This lab explains how we can use and edit an existing dashboard, how to setup the widgets on a dashboard, and how to move them around and resize them.

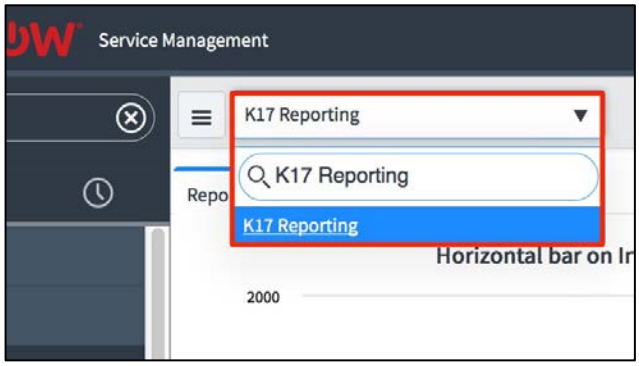
[Use case]: Joey already has a dashboard that he created. His goal is to create a great dashboard containing many actionable reports and to share this dashboard with other colleagues.

Lab 6.0
Easy editing a dashboard

1. Navigate to **Dashboards** in the left side navigator, or **Click** the ServiceNow logo in the left upper part of the screen.

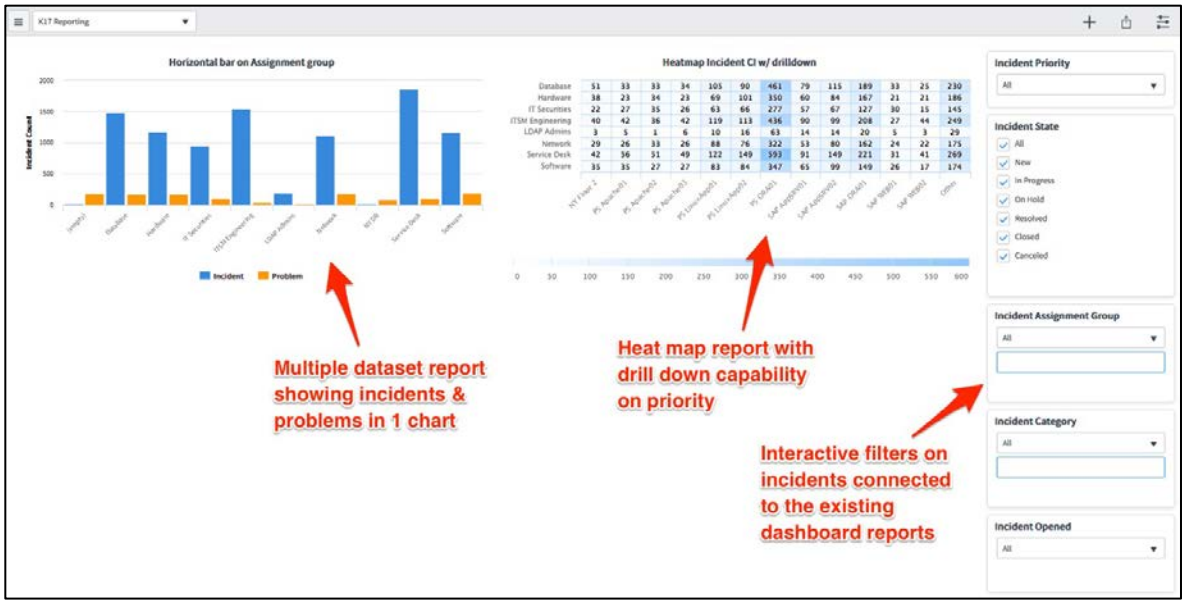


If it's not showing the "K17 Reporting" dashboard by default, you can Search for it using the Dashboard dropdown.

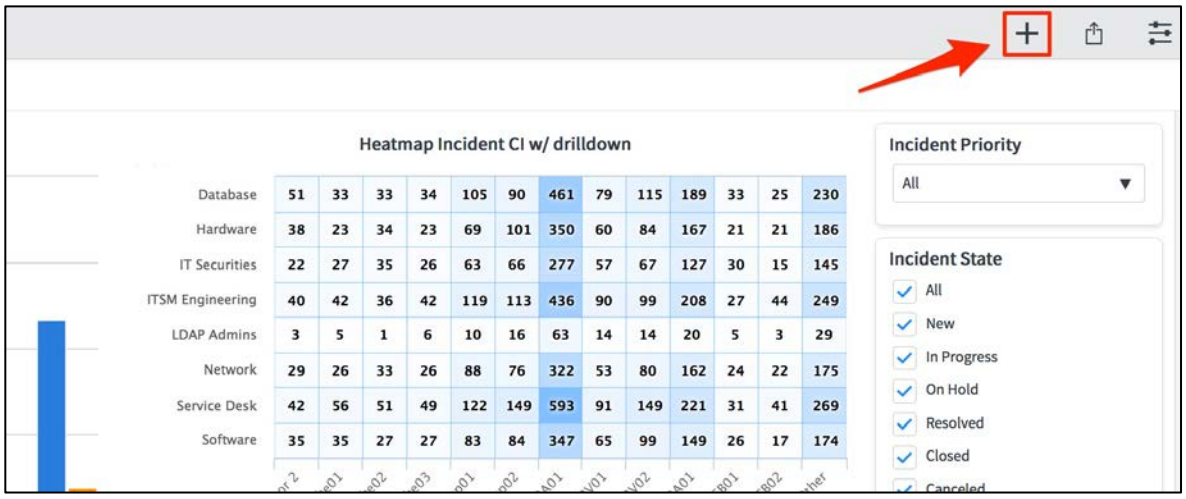


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The dashboard already has some pre-made widgets containing advanced reporting features like multiple datasets in one chart, drilling down into other charts and our interactive filters.

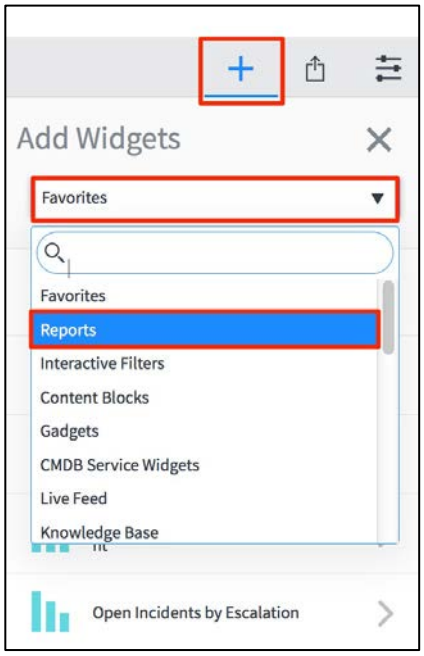


2. To add content to the dashboard, **open** the plus icon to show the right side share panel.

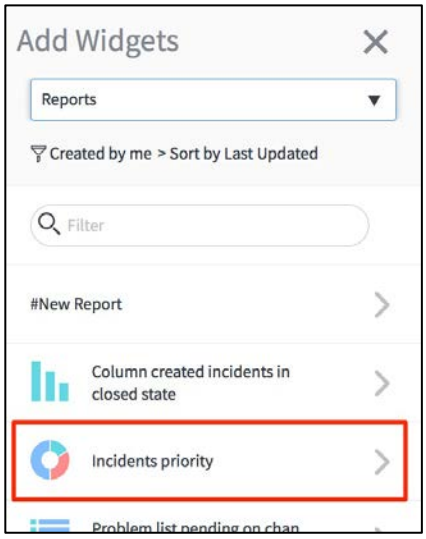


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3. **Select** Reports from the Add Widgets dropdown.

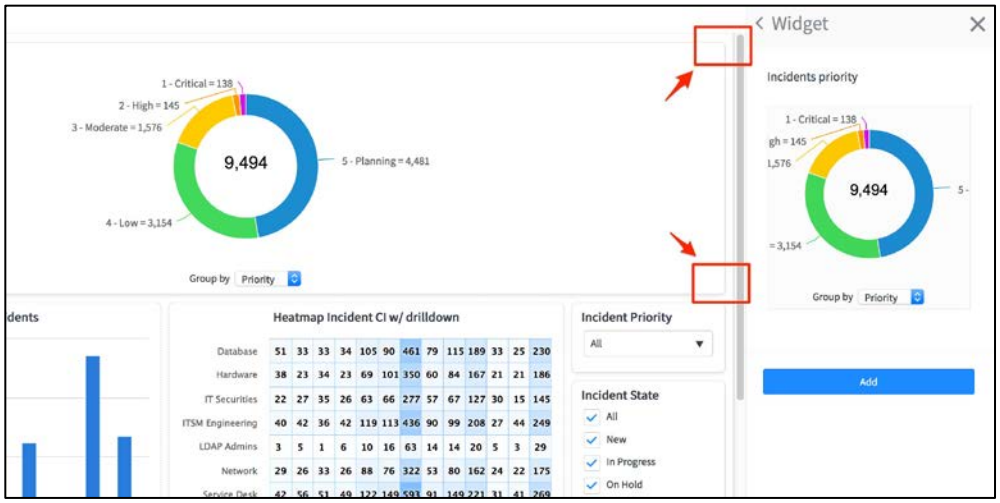


4. **Select** the previously created “Incidents priority” donut chart. The system will show a preview. **Click** Add to add the widget to the dashboard.



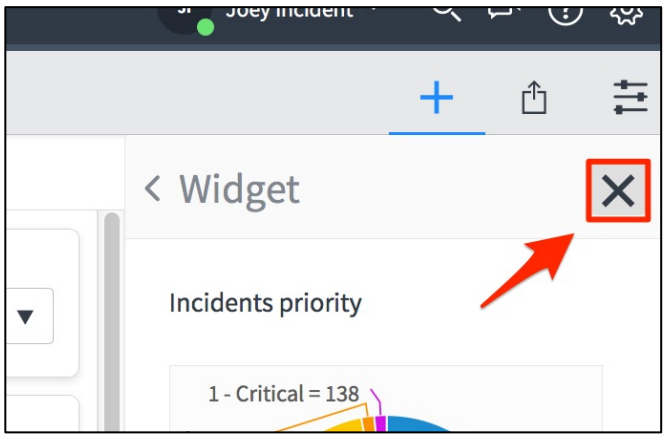
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5. Notice that the widget is now on the dashboard and as a widget on the full width of the page. While the Edit right side panel is open, we can easily resize the widget to fit better.



Select one of the corners of the widget, **Click & Hold** the corner and move/resize your widget to fit the correct size of the other existing widgets.

6. **Click** the cross to close the Edit / Add widget side panel.

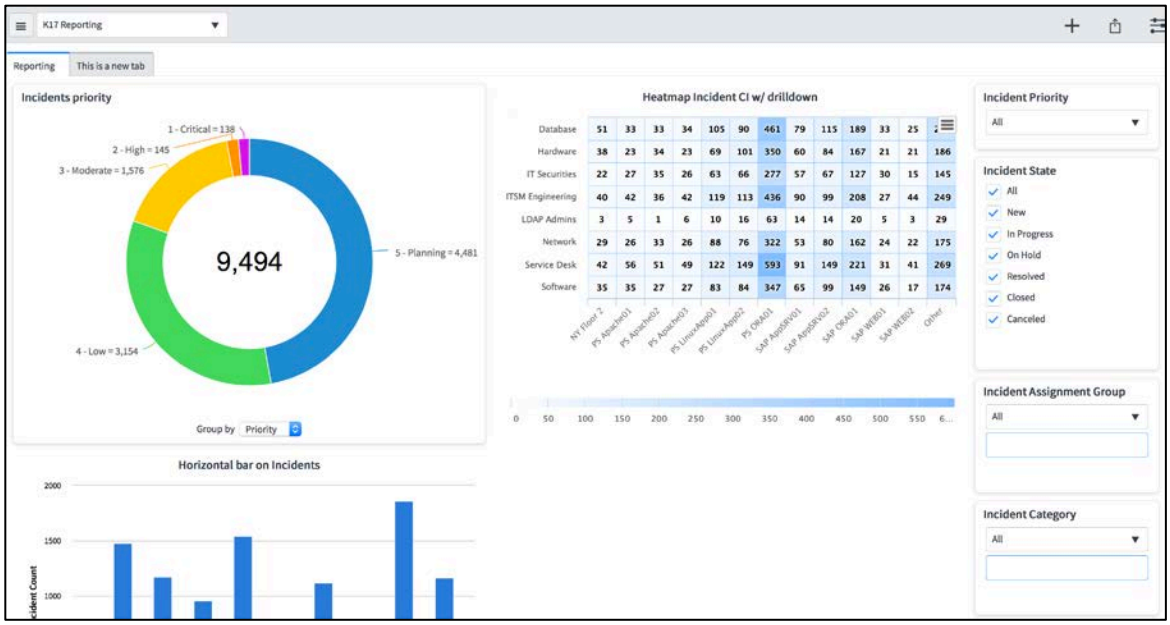


Note: Notice that after you close the Edit / Add widget side panel, all widgets on the screen will automatically resize.

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Lab Success Verification

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



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Lab Goal

This lab explains how we can use visualizations that have multiple dimensions in a single table into a visualization.

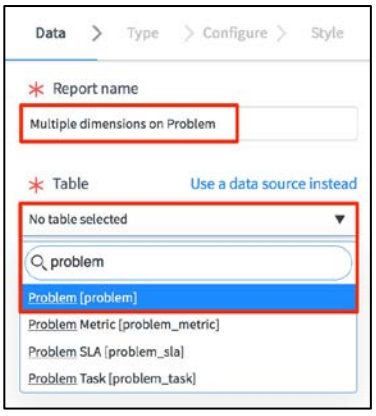
[Use case]: Joey needs to know how many escalated problems certain assignment groups worked on. He decides to use a bubble chart for it because the size of the bubble will provide a quick overview for the assignment group.

Lab 7.0 Create a multi-dimensional report

1. Navigate to **Reports > Create New** to create a new report.
2. Within the Report Designer, complete the following:
    a. On the Data step/tab, type in Report name: **Multiple dimensions on Problem**

    Make sure the guided workflow is on Tables this time. If it's showing a dropdown list of Data sources, please click the "Use a table instead" link.

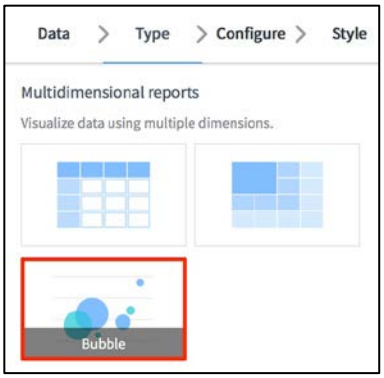
    Open the Table dropdown and **select** the "Problem" table.



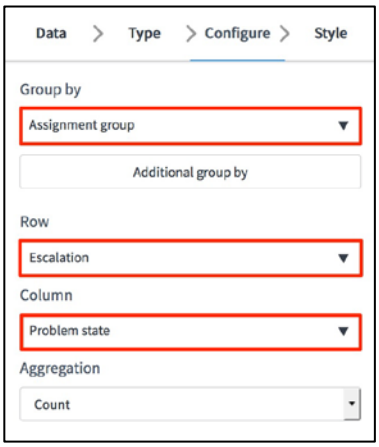
Click **Next** to navigate to the Type step.

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b. Within the Type step, **Select** the Bubble chart in the Multidimensional reports category. **Click** Next.



c. Within the Configure step, **Open** the Group by dropdown and select "Assignment group". Open the Row dropdown to select "Escalation" and open the Column dropdown to select "Problem state". **Click** Next.



d. While looking at the output, Joey decides this is not an informative visualization. He decides to change the chart into a visualization that shows the value output in a multi-level pivot chart. You can create a multi-level pivot table to display aggregate data broken down by multiple metrics in a single chart. These multiple metrics can be displayed as columns or rows.

Click Back twice or **Click** the Type tab in the guided workflow to change the type of visualization.

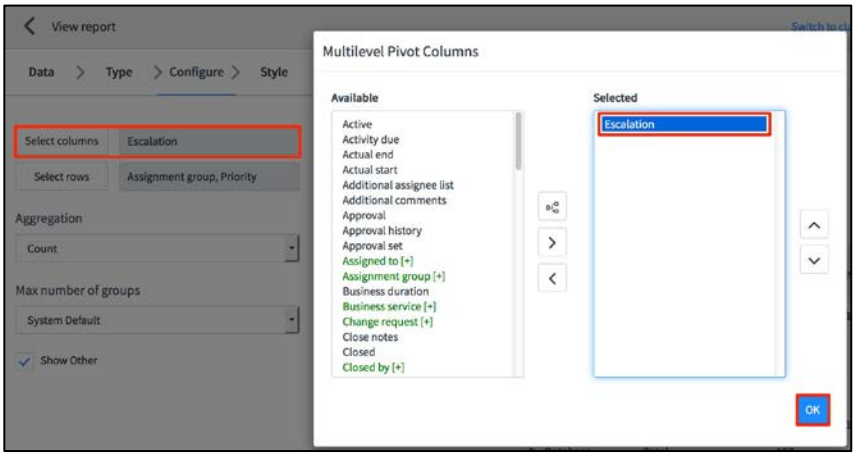
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e. Within the Type step, **Select** the Multi-level pivot table in the Multidimensional reports category. **Click** Next.



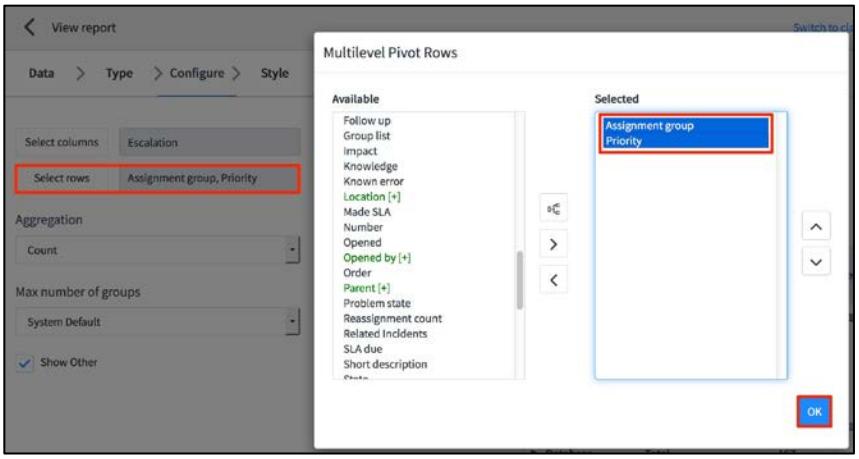
f. You will get a warning message that the workflow can't create the report yet as it needs new Row and Column values.

Click the "Select columns" button to open the modal. **Select** "Escalation" from the available fields. **Click** OK to confirm.



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Click the "Select rows" button to open the modal. **Select** "Assignment group & Priority" from the available fields. **Click** OK to confirm.



Click Next to navigate to the Style step/tab.

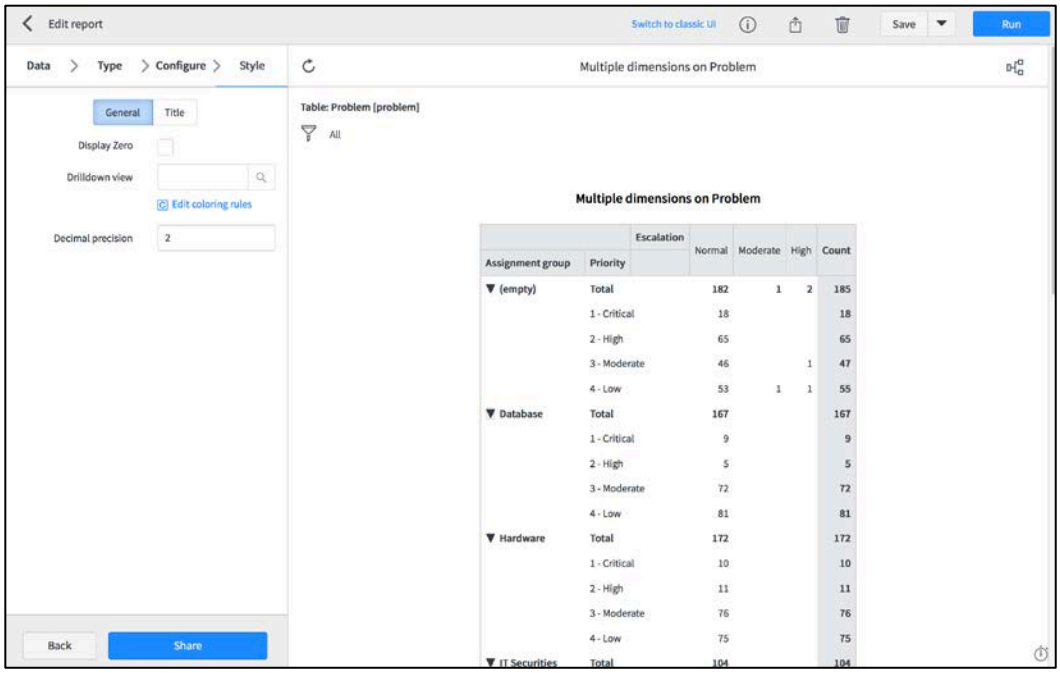
Note: Within the styling settings of a multi-level pivot chart you can set coloring rules on score values. This will help values become more visible once they reach a certain value or threshold.

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

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Lab Success Verification

1. The screen should look like the example below.



Assignment group	Priority	Escalation	Normal	Moderate	High	Count
▼ (empty)	Total		182	1	2	185
	1 - Critical		18			18
	2 - High		65			65
	3 - Moderate		46		1	47
	4 - Low		53	1	1	55
▼ Database	Total		167			167
	1 - Critical		9			9
	2 - High		5			5
	3 - Moderate		72			72
	4 - Low		81			81
▼ Hardware	Total		172			172
	1 - Critical		10			10
	2 - High		11			11
	3 - Moderate		76			76
	4 - Low		75			75
▼ IT Securities	Total		104			104

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Lab Goal

Lab 8.0 Create a (geo)Map Report

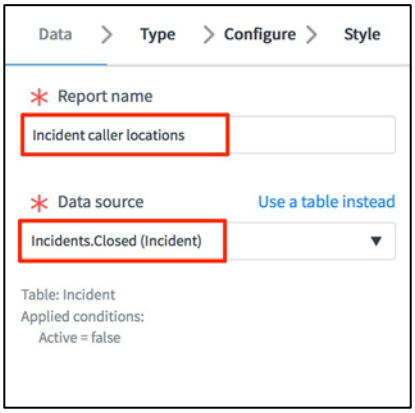
This lab demonstrates how to create a (geo) Map report to visualize aggregations on geographical charts using either a heat map or pin location representations. With the heat map, you can zoom in further by clicking on the highlighted regions, and zoom out by using the breadcrumb. After the lowest level of a Map report has been reached, a report list of that selected data is shown.

[Use case]: Joey has been asked by management to provide an overview of the geographical locations where callers have registered an incident. This will help to efficiently make use of service desk coverage in all time zones.

1. Navigate to **Reports > Create New** to create a new report.
2. Within the Report Designer, complete the following:
    a. On the Data step/tab, type in Report name: **Incident caller locations**.

    Make sure the guided workflow is on Data Source. If it's showing a dropdown list of tables, please click the "Use a table instead" link.

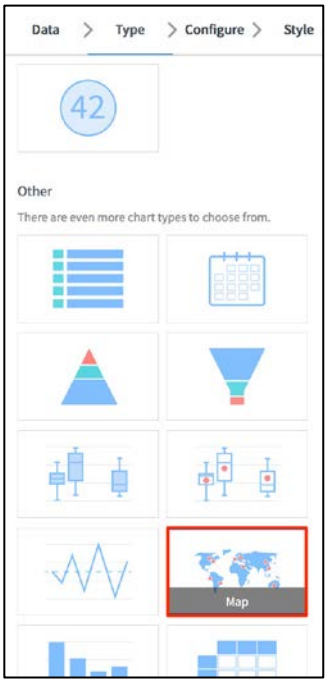
    Open the Data source dropdown and **select** "Incidents.Closed (Incident)".



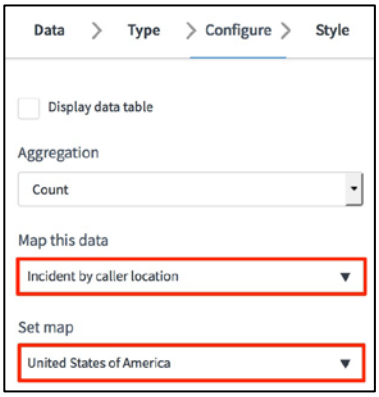
    Click **Next** to navigate to the Type step.

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b. Within the Type step, **Select** the Map visualization in the Other category. **Click** Next.



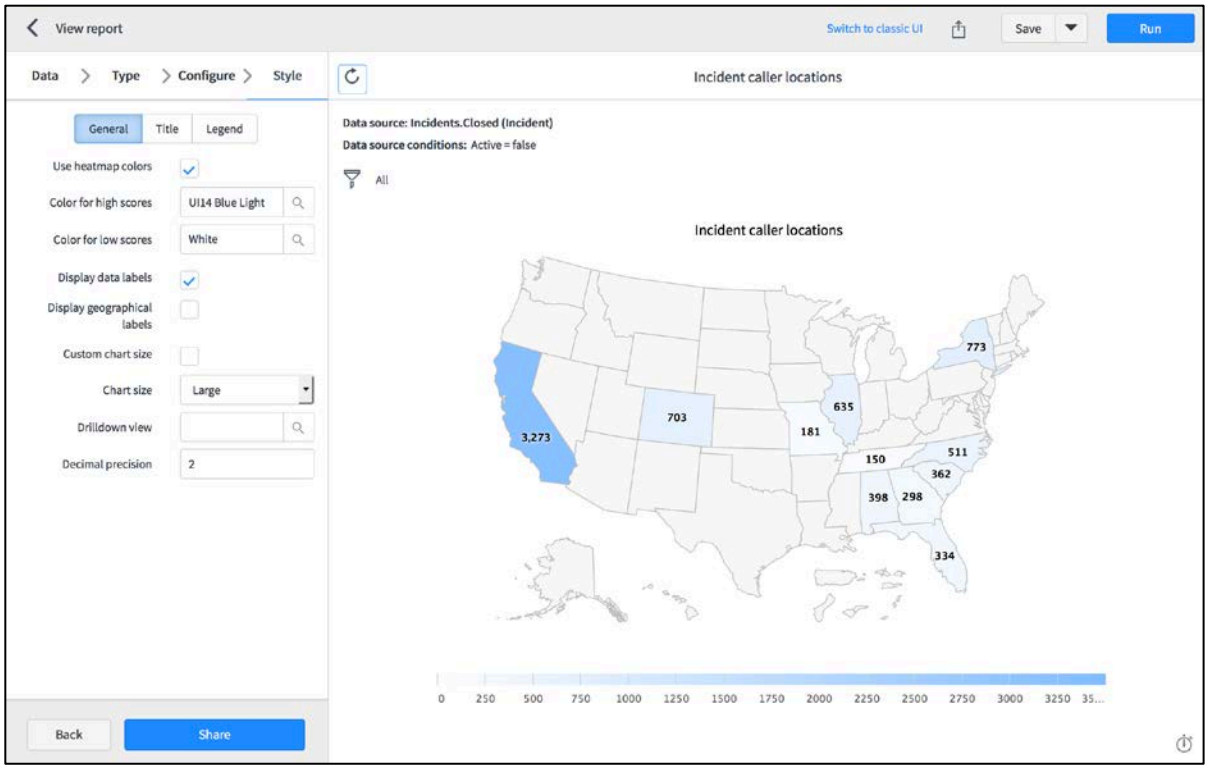
c. Within the Configure step, **Open** the Map this data dropdown and select “Incidents by caller location”. Open the Set map dropdown and select “United States of America” to select the default map to start from. **Click** Next.



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Lab Success Verification

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



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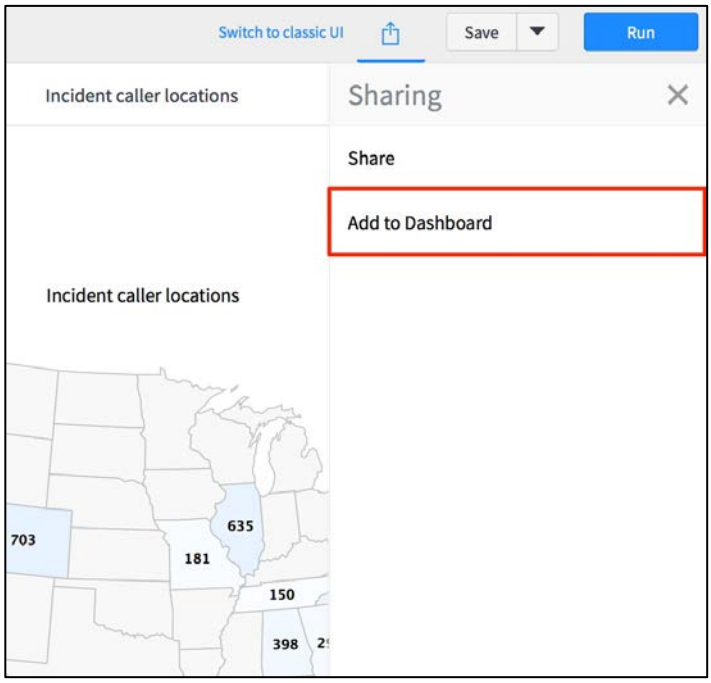
Lab Challenge – Add the report to the dashboard from the guided workflow

[Use case]: Joey realizes he should add this report to the existing dashboards because it provides a quick and powerful overview of incident caller locations in the United States.

1. **Click** the Share button within the guided workflow



2. In the Share side panel, **Click** the "Add to Dashboard" function.

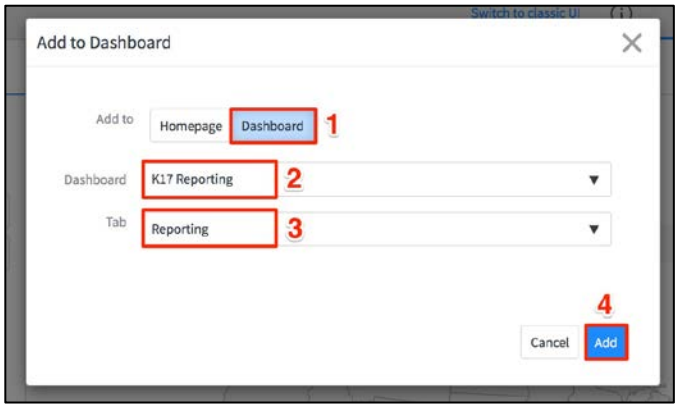


3. If you haven't saved your progress before, a popup message will appear asking you to Save. **Click** the Save & Continue button.

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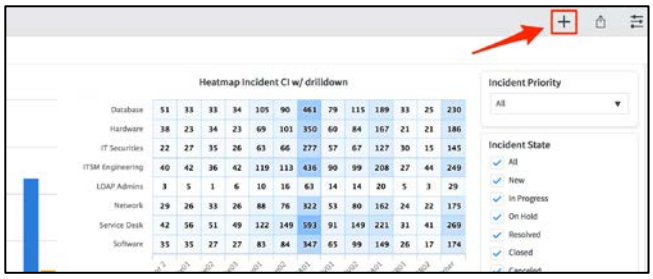
4. A modal appears; **Select** the Dashboard tab, then make sure “K17 Reporting” is selected from the first dropdown. Also make sure “Reporting” is set as the tab in the second dropdown.

   Click Add, to add the map report to our dashboard.



5. After you click Add, it will automatically bring you back to your dashboard.

   Notice that the widget has been added but it might not be in the correct form or place yet. Use the edit and resizing function from our previous lab to manually set the visualization in the dashboard.



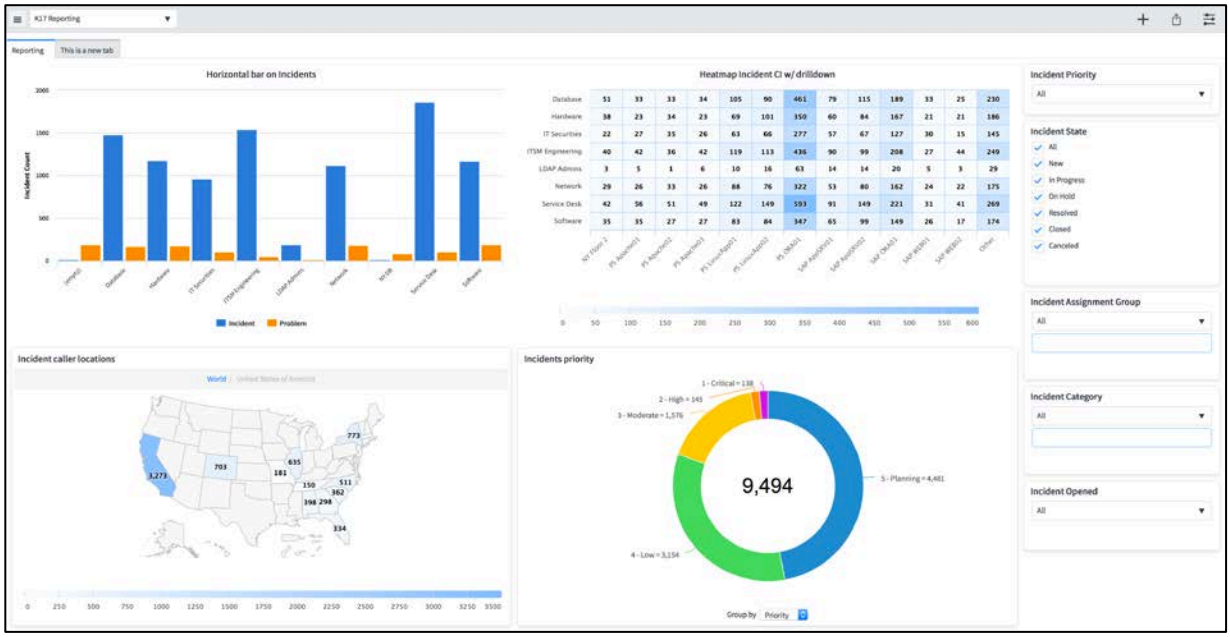
   You can do this by opening the Add Widgets side panel; click and hold the corner of the widget and resize it to the correct size. You can also select and hold the top title to move the widgets.



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Lab Success Verification

1. After resizing and moving your widget, you can set your dashboard like this.



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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 more clearly than a report or chart.

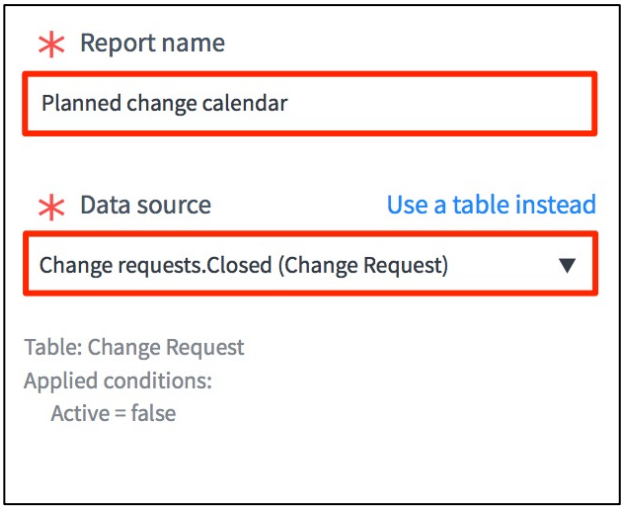
[Use case]: Joey needs to provide to the change planning team an informative overview of planned changes that are no longer active.

Lab 9.0 Create a change calendar

1. Navigate to **Reports > Create New** to create a new report.
2. Within the Report Designer, complete the following:
    a. On the Data step/tab, type in Report name: **Planned change calendar**

    Make sure the guided workflow is on Data Source. If it's showing a dropdown list of tables please click the "Use a data source instead" link.

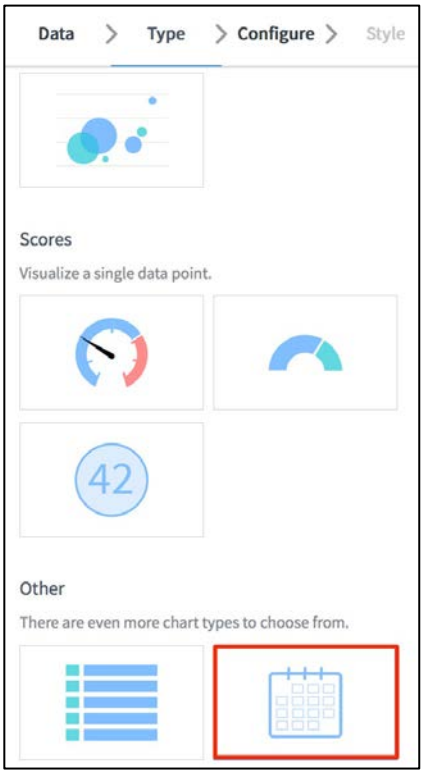
    Open the Data source dropdown and **Select** "Change requests.Closed (Change Request)".



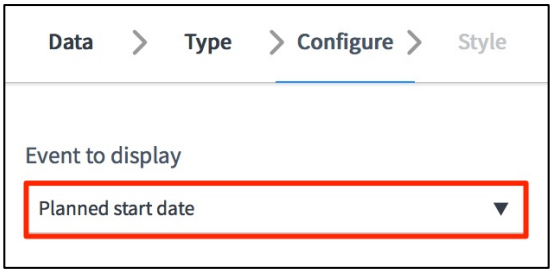
    Click **Next** to navigate to the Type step.

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b. Within the Type step, **Select** the Calendar from the other category. **Click** Next.



c. Within the Configure step, **Open** the Event to display dropdown and select "Planned start date". **Click** Next.



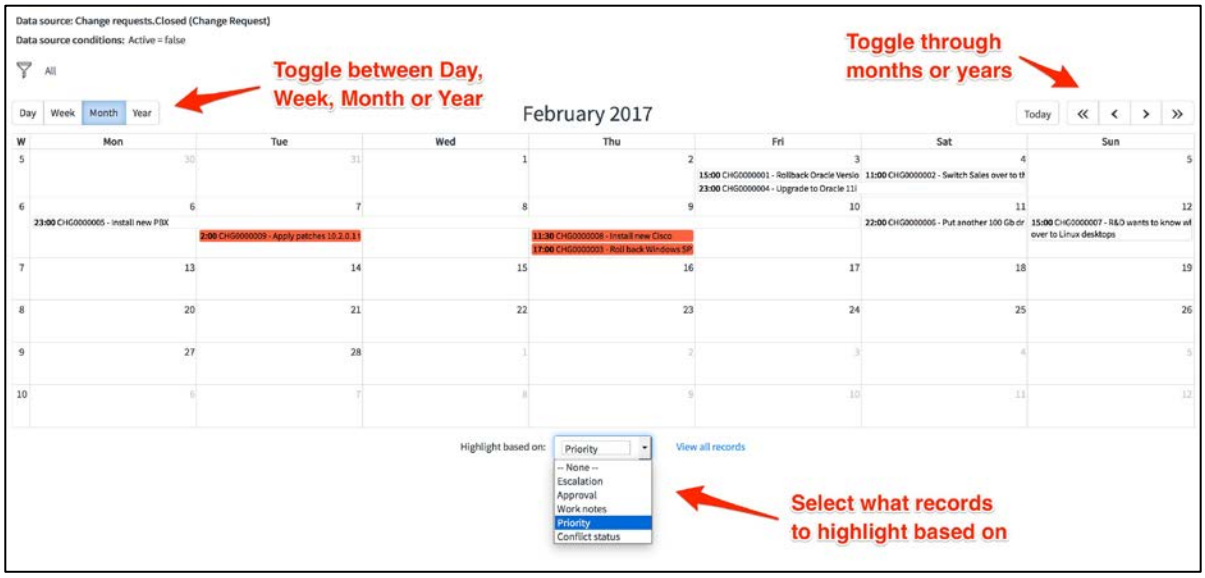
Note: Style is not applicable for the Calendar visualization.

3. **Click** the **Run** button to see the results.
4. **Click** the **Save** button to save the progress.

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Lab Success Verification

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



Note: While it's showing the already closed change requests, the current week or month overview may not show any changes. To view previous months, click the toggle buttons to move through months or years.

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Lab Goal

Lab 10.0 Real time single score visual

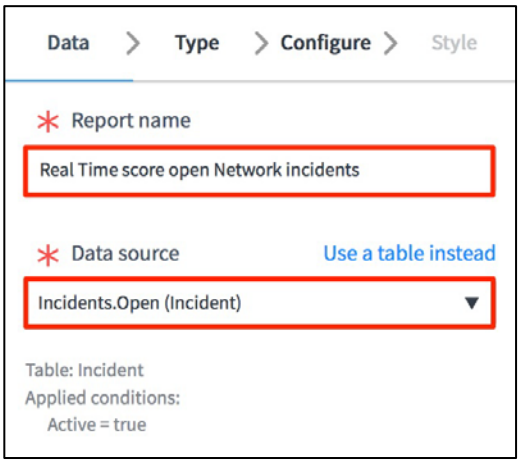
The Single Score report visualization displays a single value. Use them to share metrics or scores that are key to your business (i.e., as a widget on a dashboard).

[Use case]: Joey gets a request from management of the Network teams. They've started using dashboards more often and want to add more information to their current dashboard, which just shows a score of open incidents. They want additional information on the open incidents marked with a Network category. An important requirement is that the score should always be in real time and a manual refresh should not be necessary.

1. Navigate to **Reports > Create New** to create a new report.
2. Within the Report Designer, complete the following:
    a. On the Data step/tab, type in Report name: **Real Time score open Network incidents**

    Make sure the guided workflow is on Data Source. If it's showing a dropdown list of tables please click the "Use a data source instead" link.

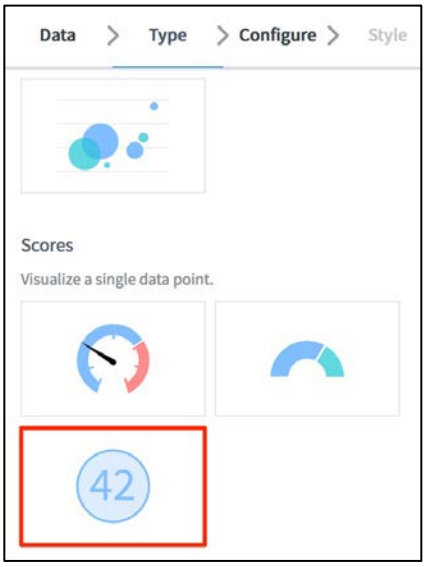
    Open the Data source dropdown and **Select** "Incidents.Open (Incident)".



    Click **Next** to navigate to the Type step.

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b. Within the Type step, **Select** the Single score from the other category. **Click** Next.



c. Within the Configure step, you will see the output of the current open incidents. The count aggregation is correct but we need to set the correct filter to only show the incidents on the "Network" category.

Open the condition builder filter and set the following conditions:

Category + is + Network



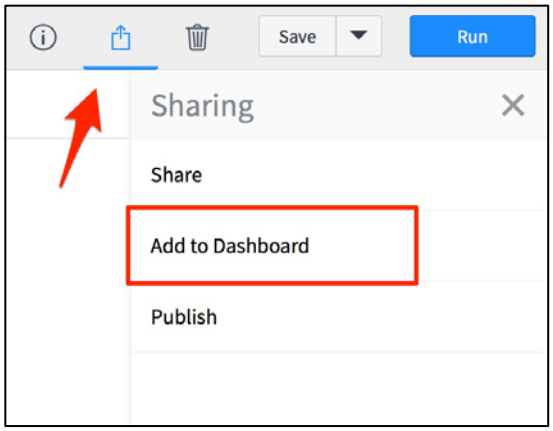
Note: Setting the filters can be done in every step of the report designer workflow.

3. **Click** the **Next** to go to the Style tab/step.

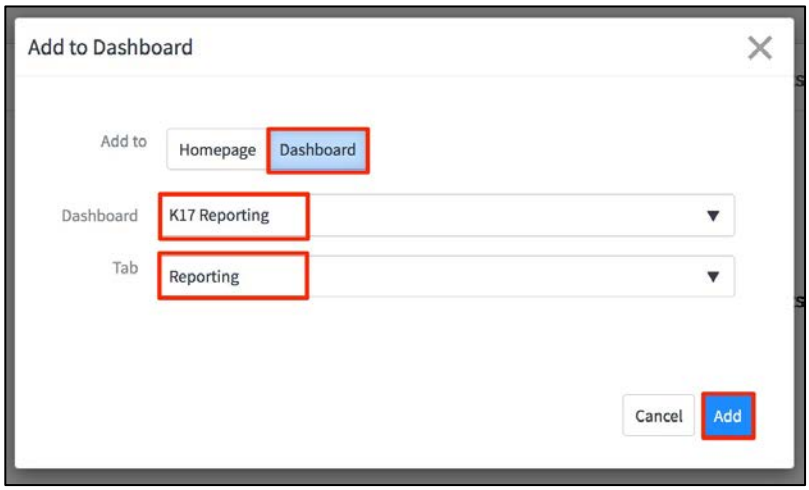
4. **Click** the **Save** button to save the progress.

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5. Now we will add it as a widget to the existing dashboard. **Click** the Share button or icon to open the share panel.



6. Within the Share modal, **Select** the Dashboard button and make sure the right dashboard and tab are selected. Then **Click** Add to add it.

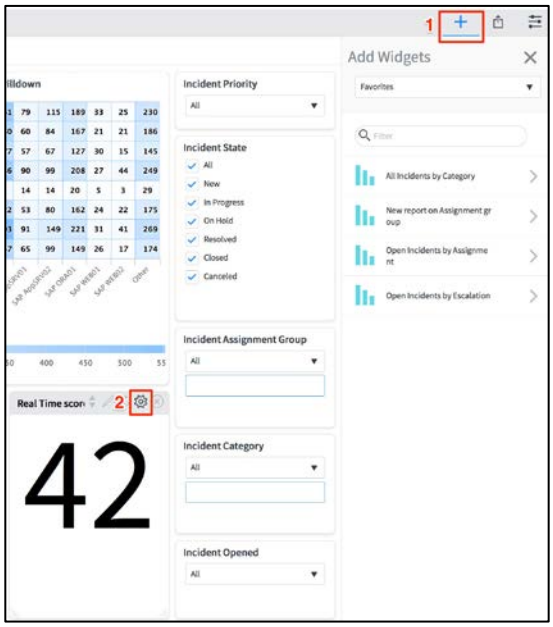


Note: The system will automatically bring you to the dashboard again.

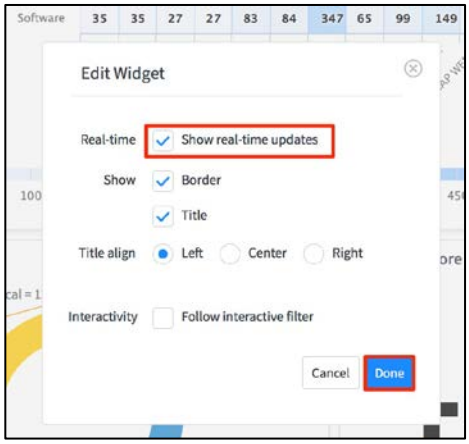
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7. On the dashboard, optionally rearrange and resize the widget (as we did in Lab 6) to provide a better overview. To do this, **Open** the Edit widget side panel. Then you can rearrange and resize them.

8. Now let's make the new report widget (with the single score of open network category incidents) follow the record watcher's real time mechanism. **Click** the Plus to open the Edit Widget side panel and **Click** the cogwheel in the widget.



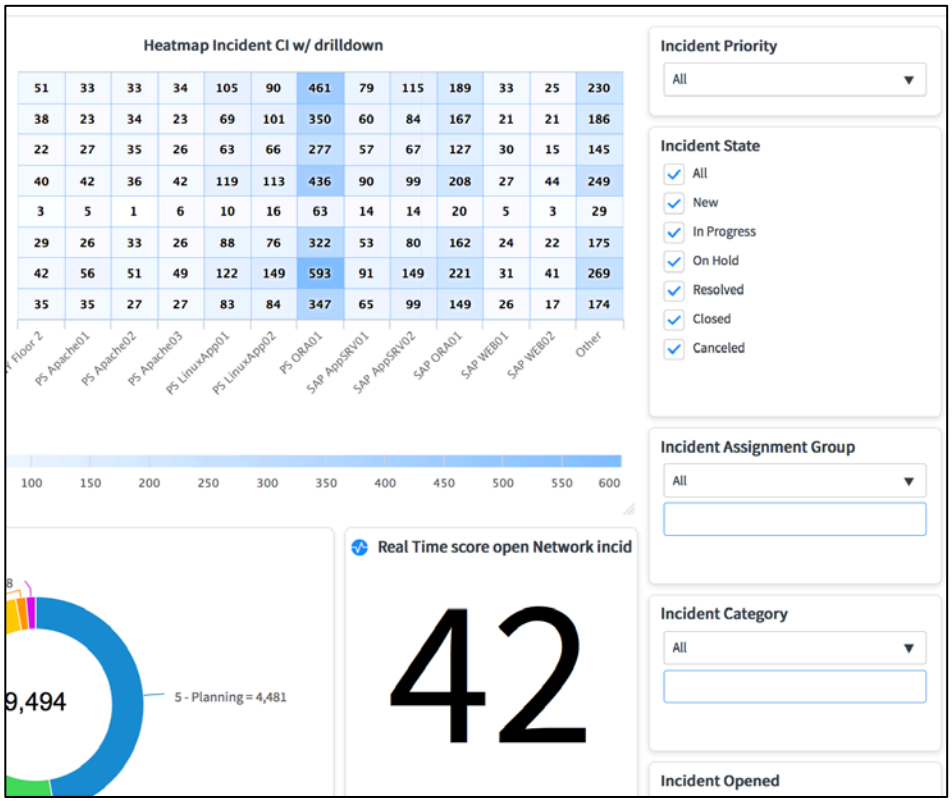
9. **Click** the "Show real-time updates" setting on. **Click** Done to confirm.



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Lab Success Verification

1. Close the Edit widget side panel. Your widget is now listening to the actual record list of that set table. If something changes, it will reflect in real time on the dashboard without having to manually refresh.

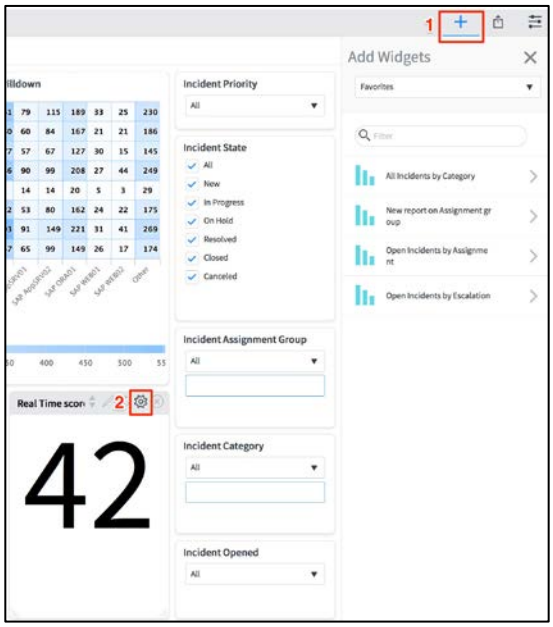


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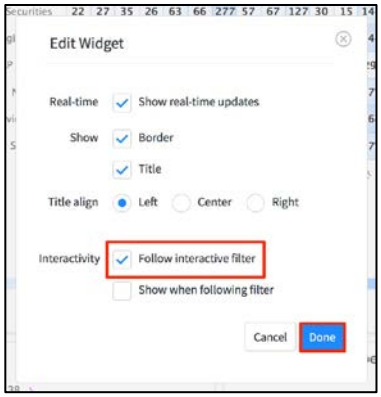
Lab Challenge 1 – Relate the Single score to the existing interactive filters

Now let's make sure the new widget on the dashboard also connects to the existing interactive filters that are on this dashboard tab.

1. **Click** the Plus to open the Edit Widget side panel and **Click** the cogwheel in the widget. The top title area with the options appears once you hover over the title of the widget.



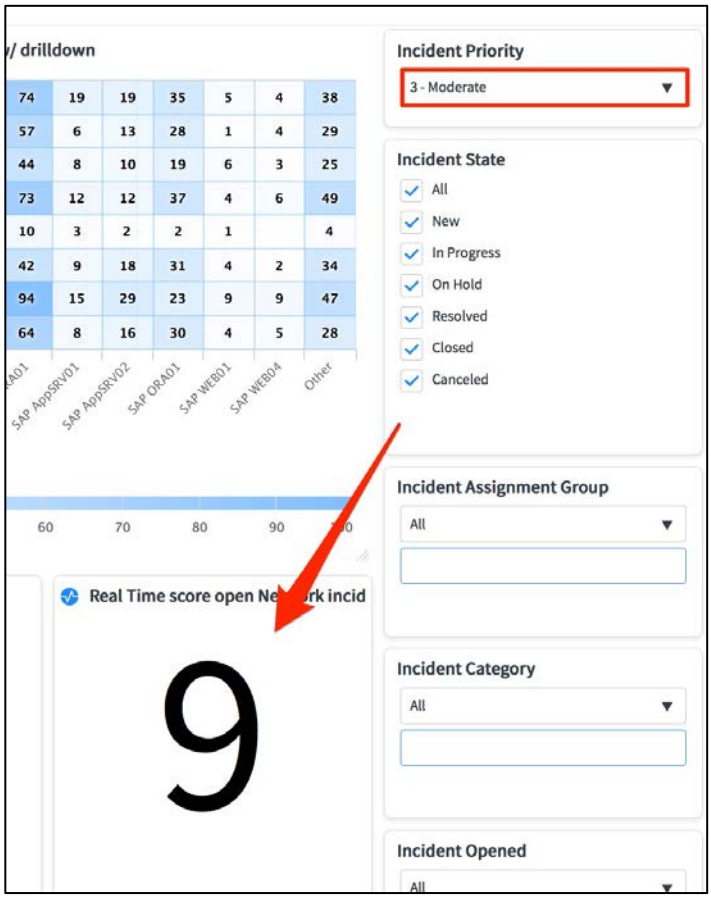
2. **Click** the "Follow interactive filter" setting on. **Click** Done to confirm.



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Lab Success Verification

1. Close the Edit widget side panel. Try out different options within the interactive filters. For example, **Change** the priority to only show Priority 3 – Moderate, or try with the other existing interactive filters.



***Note**: Certain browsers may not immediately pick up the added interactive filter. A browser refresh of the entire dashboard should allow this to work as expected.*

Note: More on interactive filters – how you can add more, or even setup your own interactive filters – will be covered in our 201 lab.

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Lab Challenge 2 – Relate the (geo)Map report and donut chart to the dashboard interactive filters

1. Repeat the same steps as in our Lab Challenge 1 to also relate the donut chart and (geo) map report widget to the interactive filters.

   Note: If you haven't done the lab challenge in the (geo) Map report lab, the Map report will not be on your dashboard.

2. **Click** the Plus icon to open the Edit Widget side panel and **Click** the cogwheel within the widgets.

3. **Click** the "Follow interactive filter" setting on for both widgets. **Click** Done to confirm.

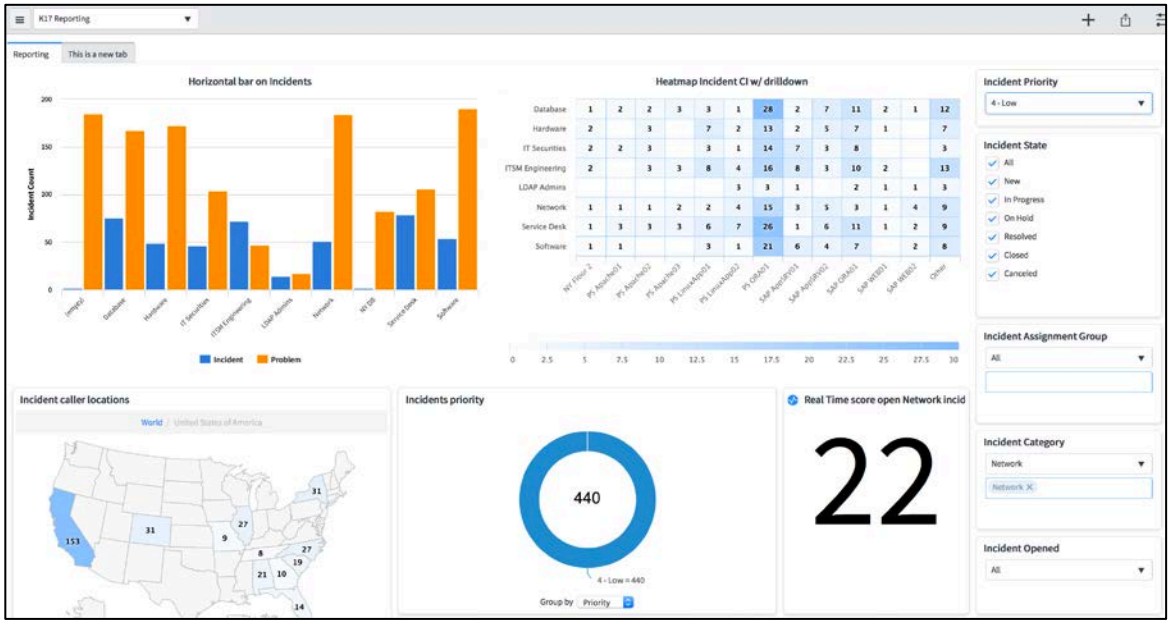
   Note: Notice that the donut chart can work as an interactive filter itself. When you click this setting and use the donut to click its parts, you can see the other widgets interactively respond.

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Lab Success Verification

1. Your dashboard with the reports should look something like the below image.

2. Try the interactive filters. For example, see what happens if you only select the Incident Priority to “4-Low” and Incident Category on “Network”. Or, try other interactive filters.



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