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WORK at LIGHTSPEED

Reporting Essentials 101

Lee Cato
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ServiceNow

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ServiceNow

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servicenow

Agenda

- Introductions
- Objectives, What You Will Learn
- Talk Some Reporting
- Benefits of Being in Platform, Performance Analytics & Reporting
- Now Let's Do Some Labs!
- Teaser / Trailer - What to Expect From the Jakarta Release

Note: Start your Lab instance using the lab URL below

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Speaker Introduction



Name: Lee Cato

Title: Principal Solution Consultant

Function: Performance Analytics Technical Sales

Company: ServiceNow

Experience: 25 years of Business Intelligence and Performance Analytics

Expertise: Analytics, Data Warehouse, Business Intelligence

Current Projects: Leading clients through their Analytics journey on the ServiceNow Platform

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Speaker Introduction



Name: Robert Barmentloo

Title: Product Manager Analytics & Reporting

Function: Development/IT/Services

Company: ServiceNow

Experience: A few years product management / product owner SCRUM.

Expertise: DevOps, Agile, ITSM, Project management, Data visualizations.

Achievements: Together with Reporting Dev team we worked on real-time reporting, new Calendar & (Geo)Map report, simple join and a full new way of report creation using a guided workflow, BYOD Import Excel, Analytics & Reporting service portal content, improved single score, and multi-level pivot reports.

Current Projects: Having the best Analytics & Reporting quality and making an awesome K-release!

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Objectives and What You Will Learn

Objectives

- Learn Reporting and the goal to make reports meaningful and give them the audience it deserves!

What you will learn

- The basics of data visualization using ServiceNow in platform Reporting
- The importance of making reports meaningful
- All the essential Reporting features and functionality
- Many Reporting best practices
- Using and editing ServiceNow dashboards to view and collaborate
- The importance of report data sources and sharing
- …and what's coming with the Jakarta release!

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Let’s Talk Some Reporting

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What is Reporting?



It enables you to visualize data



Informative & actionable

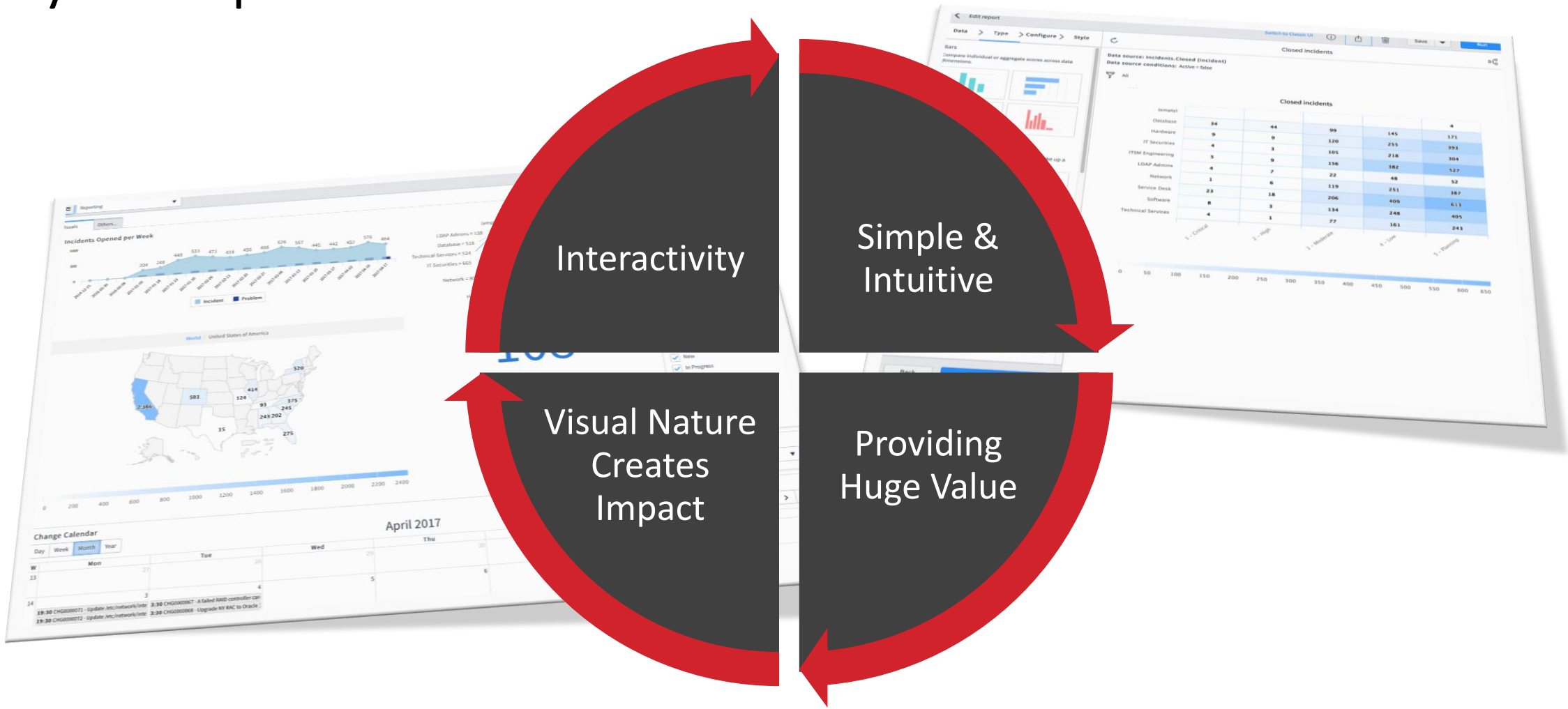


And always real-time

- Make Reports meaningful; they should trigger a follow up action!
- Share your reports; they deserve a bigger audience!

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Key Concepts



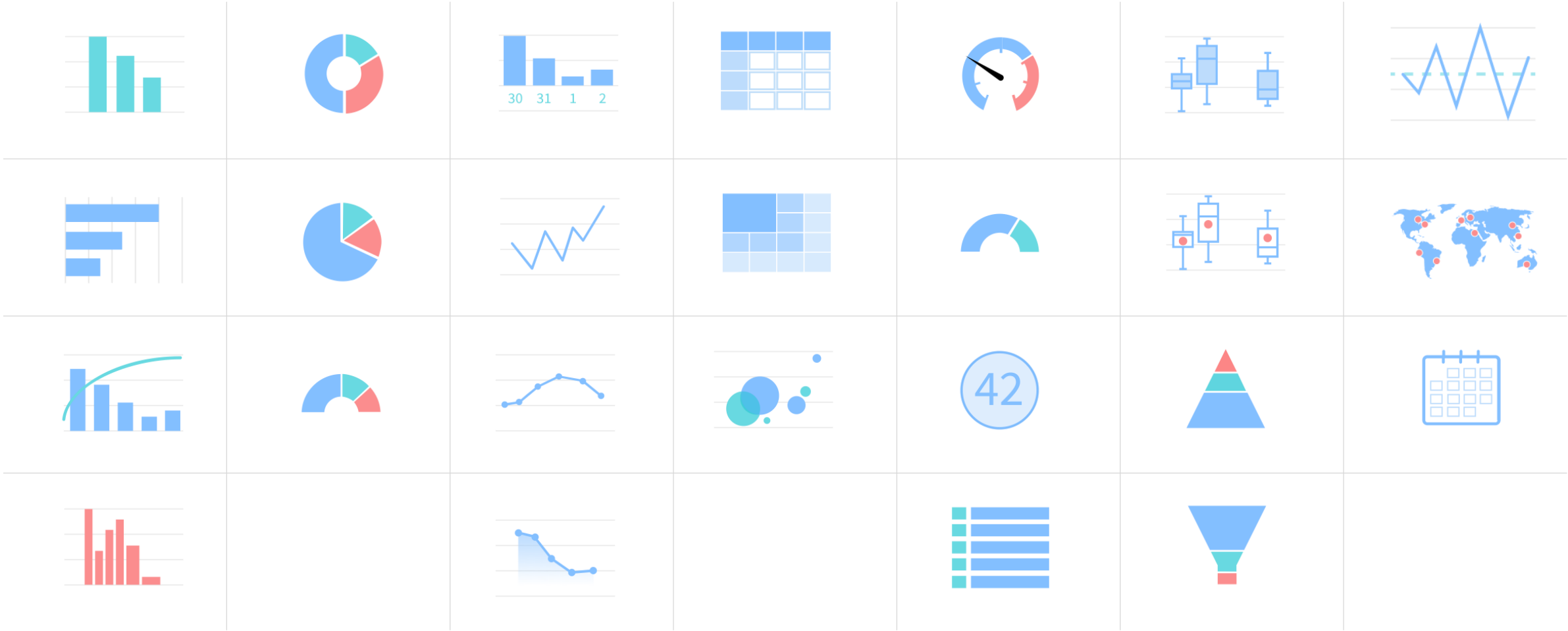
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ServiceNow in Platform Reporting is…

- **In platform reports delivered within the apps**
- **Ability to create and customize reports**
- **All the Reporting features & functionality, like…**
  - Dashboards to show data visualizations on
  - Distribute reports by
    - Sharing
    - Adding it to dashboards
    - Schedule & Export reports
    - Publish
  - Interactive filters *PA Premium
  - Setting up Drilldown and Multiple datasets in the same report
  - Creating simple join relations to another table's conditions
  - Report on Metrics or variables
  - Additional group by / stack by options
  - Report ranges (aka buckets)
  - Many administrative features like
    - Report Statistics
    - Setting up Report Sources & Maps
    - Setting up Headers & Footers

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Visualization Overview



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Benefits of Being ‘In-Platform’



REAL-TIME

Make fast decisions with confidence

Because your data stays in-platform at all times, it retains its **integrity**. Your scorecards and dashboards show to-the-minute information, empowering you to adapt at the speed of business.



NATIVE

Make smart, data-driven actions

Out of the box content precisely tuned to and optimized for ServiceNow workflows; best-practice metrics developed in tandem with application teams; designed for teams to communicate and collaborate.



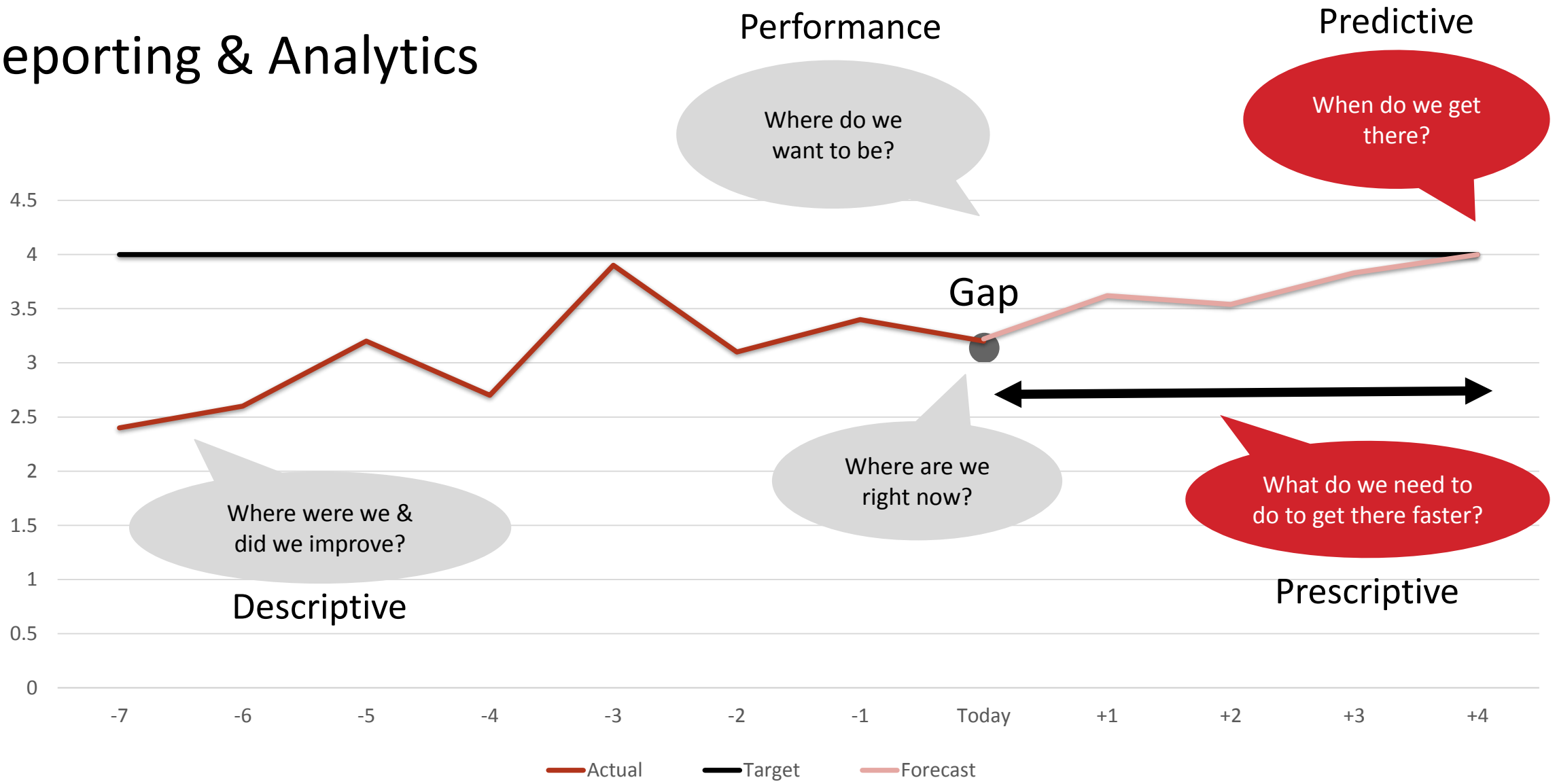
SECURE

Reduce cost and risk

No data is duplicated or leaves the secure ServiceNow enterprise cloud. Data is protected at all times by the same access control lists you implement across the platform.

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Reporting & Analytics



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Before We Start, Top Tips for Reporting!

With visualizing data, always ask yourself…

- What do I want to present to people?
- What's my strategy?
- What are these follow-up actions I want to trigger?
- Can I bring it back to the service, what is it I'm trying to provide?
- What's most meaningful for my Report audience to see and consume?
- Leverage the in-platform benefits!

"Just having lots of reports doesn't make you a data-driven organization…"

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Lab 1.0 Create a List Filter

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Lab Persona Introduction



Name: Joey Incident

Title: Incident hero and Reporting wizard

Company: ServiceNow

Experience:	Almost none, but it's just very user friendly & easy to adopt ☺
Expertise:	ITSM, Data visualization
Achievements:	Made some pretty nice shared dashboards that have a big usage!
Current Projects:	Being a hero, full-time.

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Lab 1.0 Create a List Filter

Timebox:
8 minutes

Use case:

Joey needs a list overview of current open critical incidents.

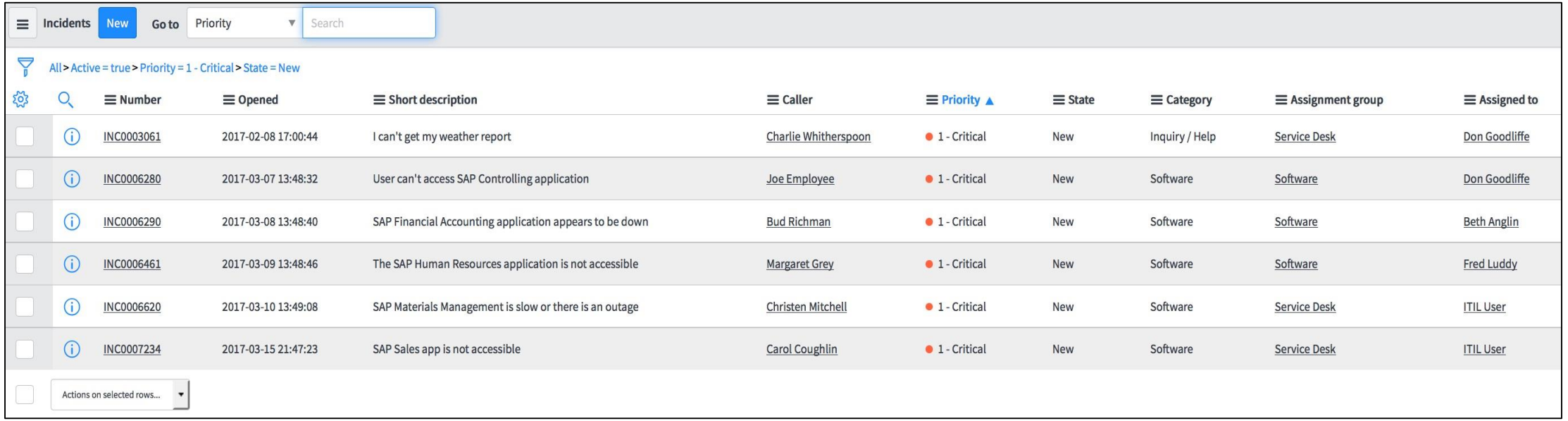
- **Log on the Training instance**
- **Filter List Data**

- **Lab Challenge 1 – Save as a Personal Filter**
- **Lab Challenge 2 – Removing Breadcrumb Selections**
- **Lab Challenge 3 – Convert the List Data into a Graph/Chart**

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Lab 1.0 Result

Lab Success Verification (w/o lab challenges)



Number	Opened	Short description	Caller	Priority	State	Category	Assignment group	Assigned to
INC0003061	2017-02-08 17:00:44	I can't get my weather report	Charlie Whitherspoon	1 - Critical	New	Inquiry / Help	Service Desk	Don Goodliffe
INC0006280	2017-03-07 13:48:32	User can't access SAP Controlling application	Joe Employee	1 - Critical	New	Software	Software	Don Goodliffe
INC0006290	2017-03-08 13:48:40	SAP Financial Accounting application appears to be down	Bud Richman	1 - Critical	New	Software	Software	Beth Anglin
INC0006461	2017-03-09 13:48:46	The SAP Human Resources application is not accessible	Margaret Grey	1 - Critical	New	Software	Software	Fred Luddy
INC0006620	2017-03-10 13:49:08	SAP Materials Management is slow or there is an outage	Christen Mitchell	1 - Critical	New	Software	Service Desk	ITIL User
INC0007234	2017-03-15 21:47:23	SAP Sales app is not accessible	Carol Coughlin	1 - Critical	New	Software	Service Desk	ITIL User

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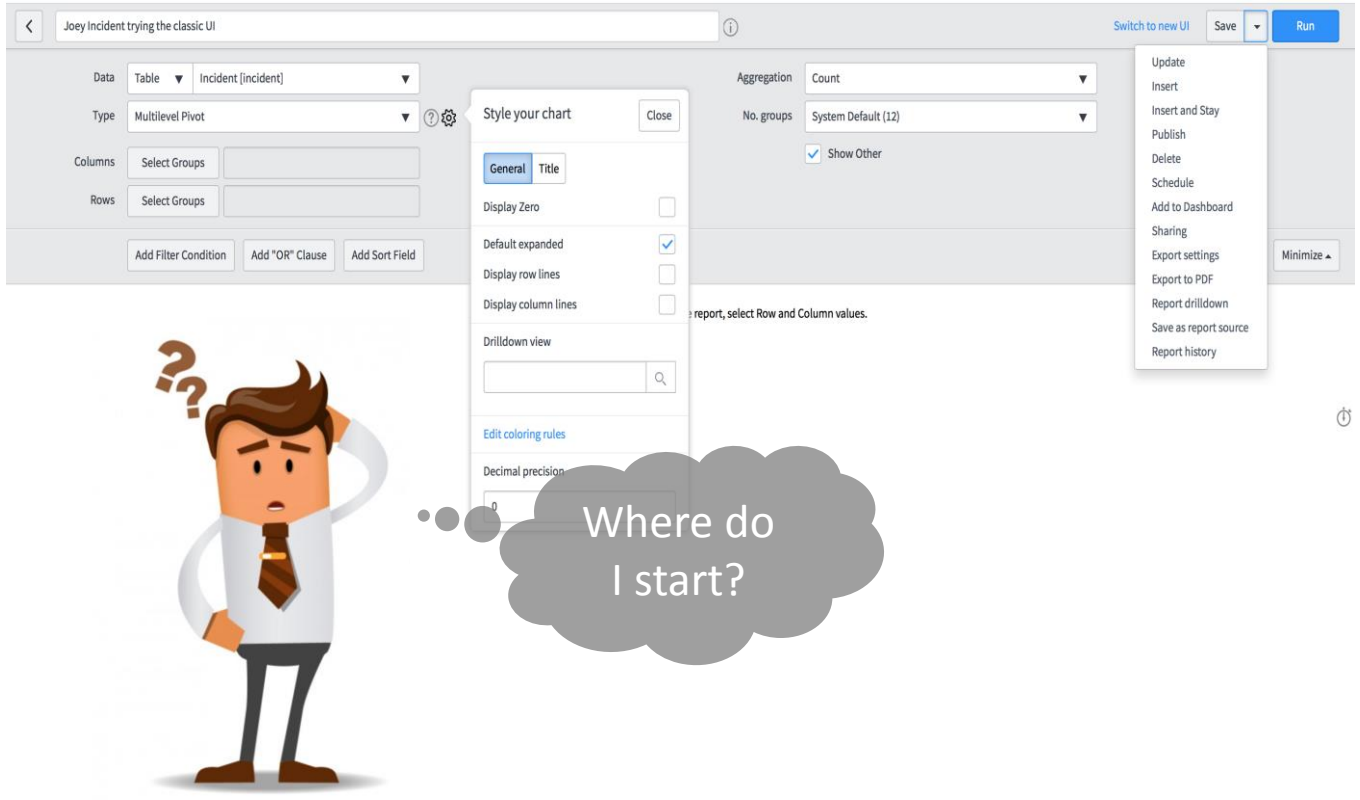
Lab 2.0 Modify an Existing Report

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Pre-Lab 2.0: Why do we need a new report creation solution?

- Focus on the beginning reporting user
- Easier way of visualizing through a stepped approach
- Only showing relevant options
- Refactored high quality codebase
- Better performing, more stable

***Note**: For the coming release(s) we will still offer the opportunity to switch back to classic UI.*



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Lab 2.0 Modify an Existing Report

Timebox:
8 minutes

Use case:

Joey needs to create a report to provide a meaningful insight into current load of open incidents per assignment group. For management to base a resource decision on.

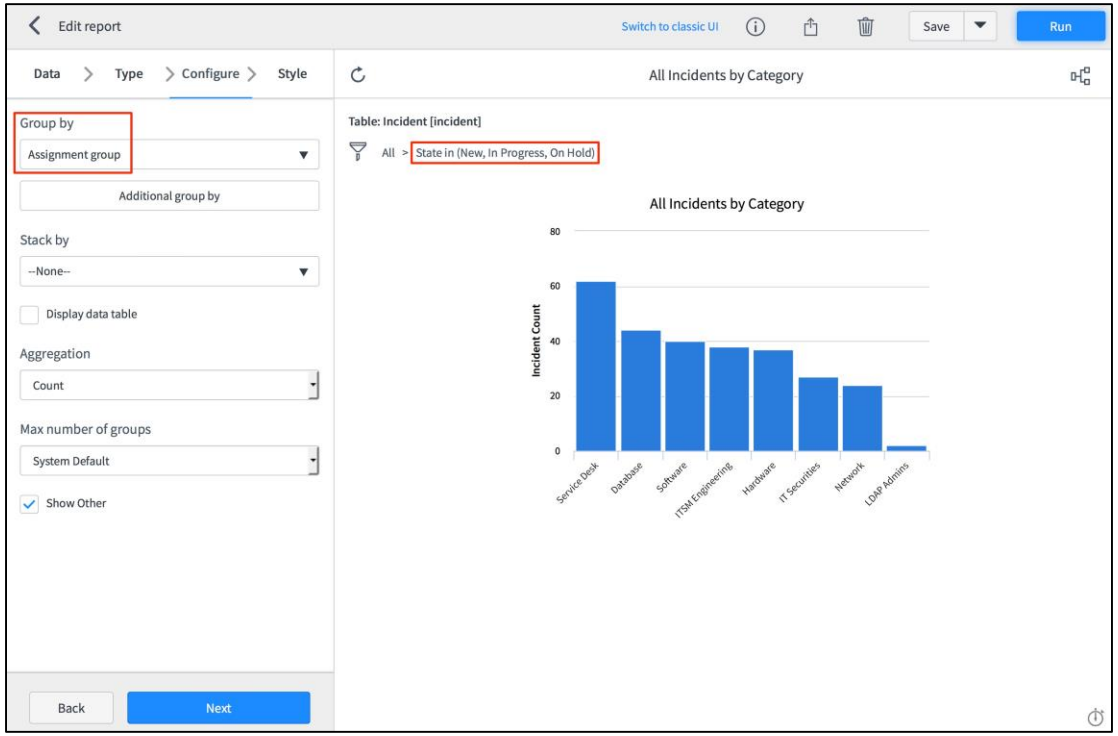
- **View you default Reports homepage**
- **Open an existing report**
- **Change Group by**
- **Add filter conditions**

- **Lab Challenge – Using Stacked by options**

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Lab 2.0 Result

Lab Success Verification (w/o lab challenges)



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Lab 3.0 Create a New List Report

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Pre-Lab 3.0: The Power of Data Report Sources

- Report data sources are predefined data sets for creating reports
  - Having a fixed table together with preconfigured conditions
- These sources have many benefits:
  - It ensures everyone is reporting on the correct set of conditions
  - If a condition changes, you would only have to change the data source, not all the reports
  - Saves time setting up reports
  - And many more!



Data source: Active Priority 1 Incidents
Table: Incident
Conditions:
Active is true AND
Priority is 1 - Critical

Report 1
Data source: Active Priority 1 Incidents
Conditions:
Assignment group is Hardware

Report 2
Data source: Active Priority 1 Incidents
Conditions:
Assignment group is Software

Report 3
Data source: Active Priority 1 Incidents
Conditions:
SLA due on today

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Lab 3.0 Create a New List Report

Timebox:
8 minutes

Use case:

The Problem management team is requesting a real-time list overview of all items that have an open problem and are currently waiting for a change to be fixed.

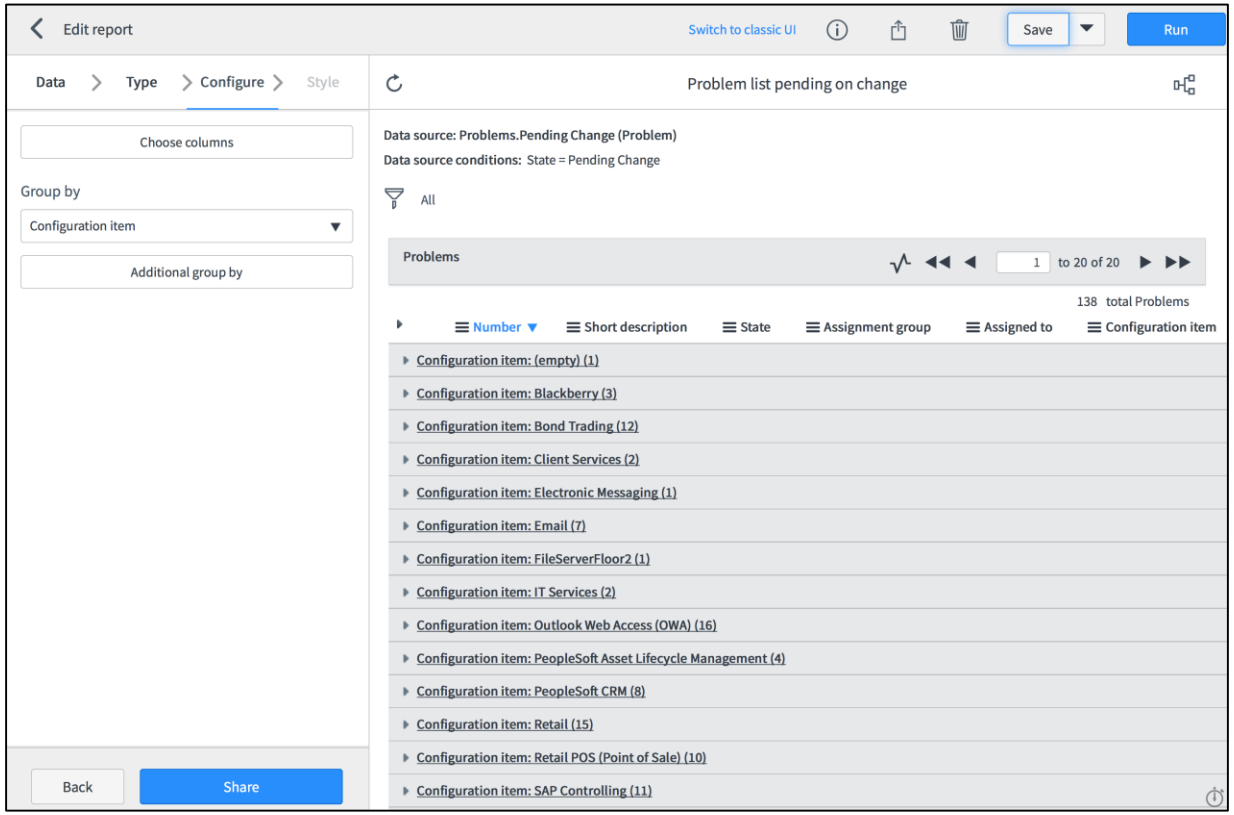
- **Create a report from new Report Designer guided workflow**
  - **Select the Data**
  - **Choose the Type**
  - **Set the Configuration**

- **Lab Challenge – Filter on information beyond the base table**

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Lab 3.0 Result

Lab Success Verification (w/o lab challenges)



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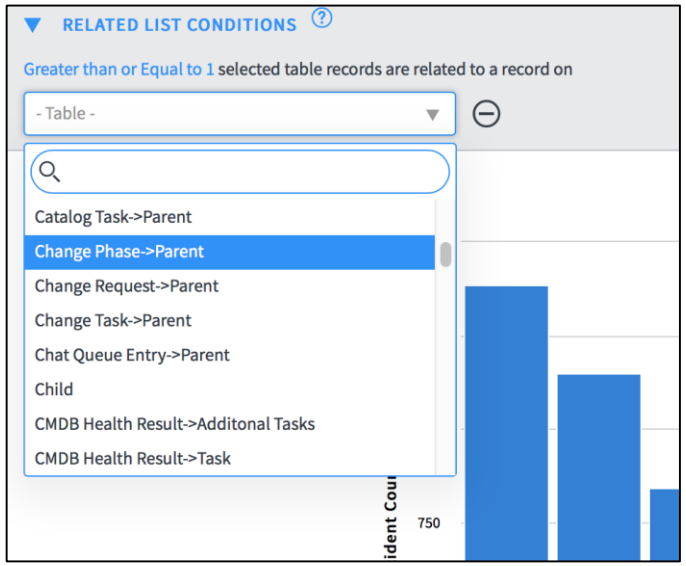
Lab 4.0 Create a New Donut Chart

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Pre-Lab 4.0: Join the Fun of Multiple Conditions

- Related list conditions (joins) provide an easy way to use other tables conditions within your report
- To show only the results that have a selected number of related records

***Note**: In previous releases, this was also possible but needed a more complex database view relation*





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Lab 4.0 Create a New Donut Chart

Timebox:
9 minutes

Use case:

To provide more insight on a dashboard, Joey needs to create a report widget to reflect an amount of records grouped by priority.

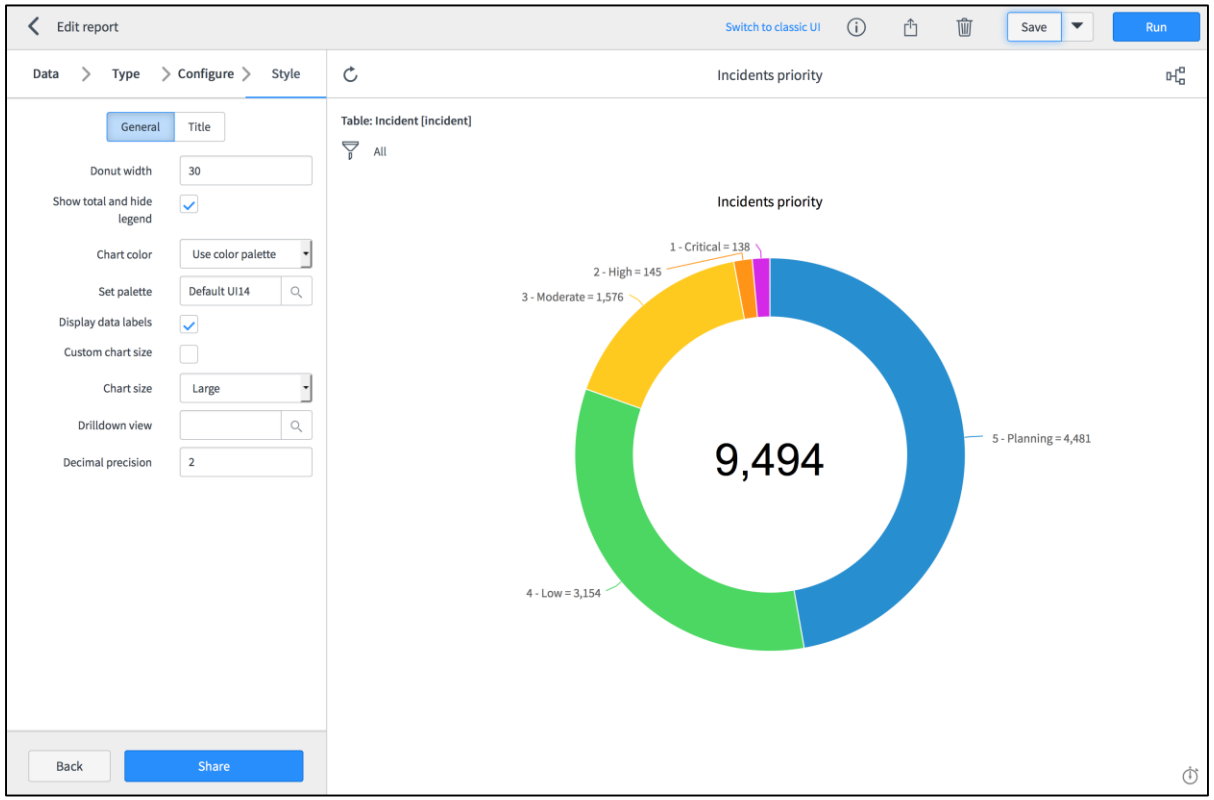
- **Create a donut chart from within the Report Designer guided workflow**
  - **Select the Data**
  - **Choose the Type**
  - **Set the Configuration**
  - **Change the styling**

- **Lab Challenge 1 – Make a join relation to another table's conditions**
- **Lab Challenge 2 – Adding Dynamic Grouping Options to the Chart**

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Lab 4.0 Result

Lab Success Verification (w/o lab challenges)



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Lab 5.0 Create a Time Series Chart

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Lab 5.0 Create a Time Series Chart

Timebox:
9 minutes

Use case:

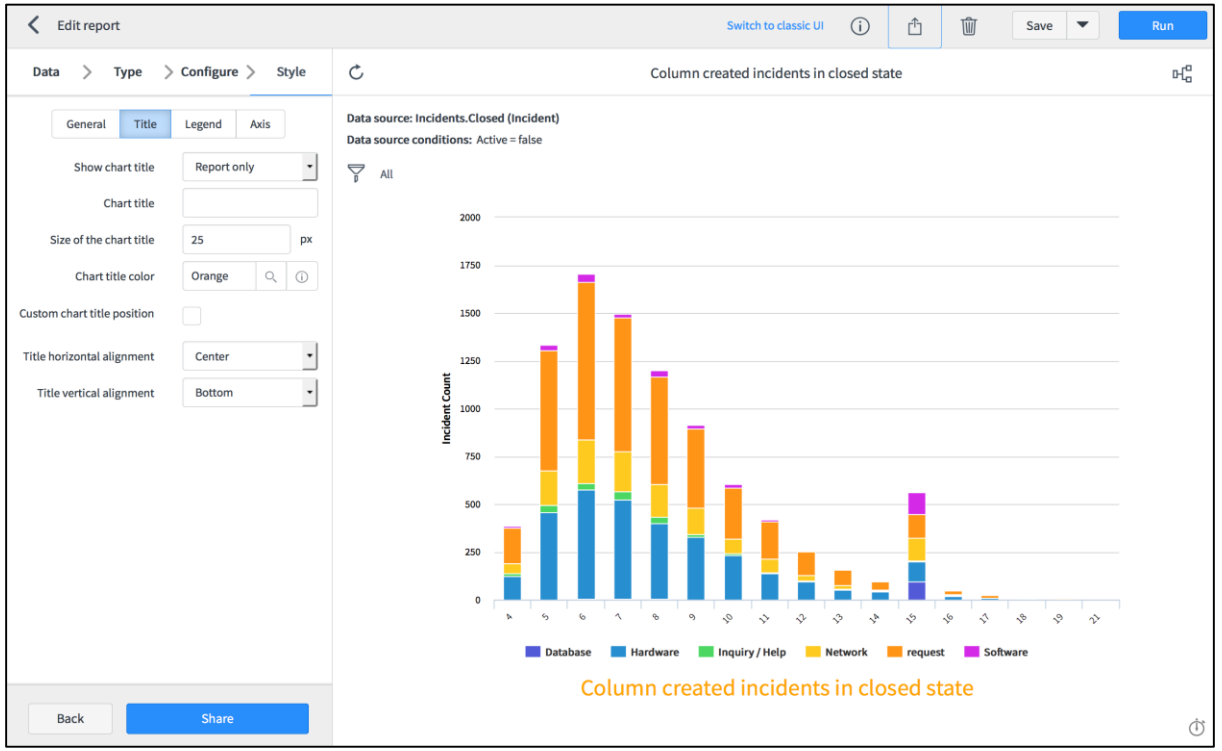
For resource planning, Joey needs to create another meaningful insight in demand of capacity of the work areas. As the resource planning team needs to investigate if current capacity over the day is sufficient.

- **Create a column chart from within the Report Designer guided workflow**
  - **Select the Data**
  - **Choose the Type**
  - **Set the Configuration**
  - **Change the styling**
- **Share the report to another user**

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Lab 5.0 Result

Lab Success Verification (w/o lab challenges)



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Lab 6.0 Easy Editing a Dashboard

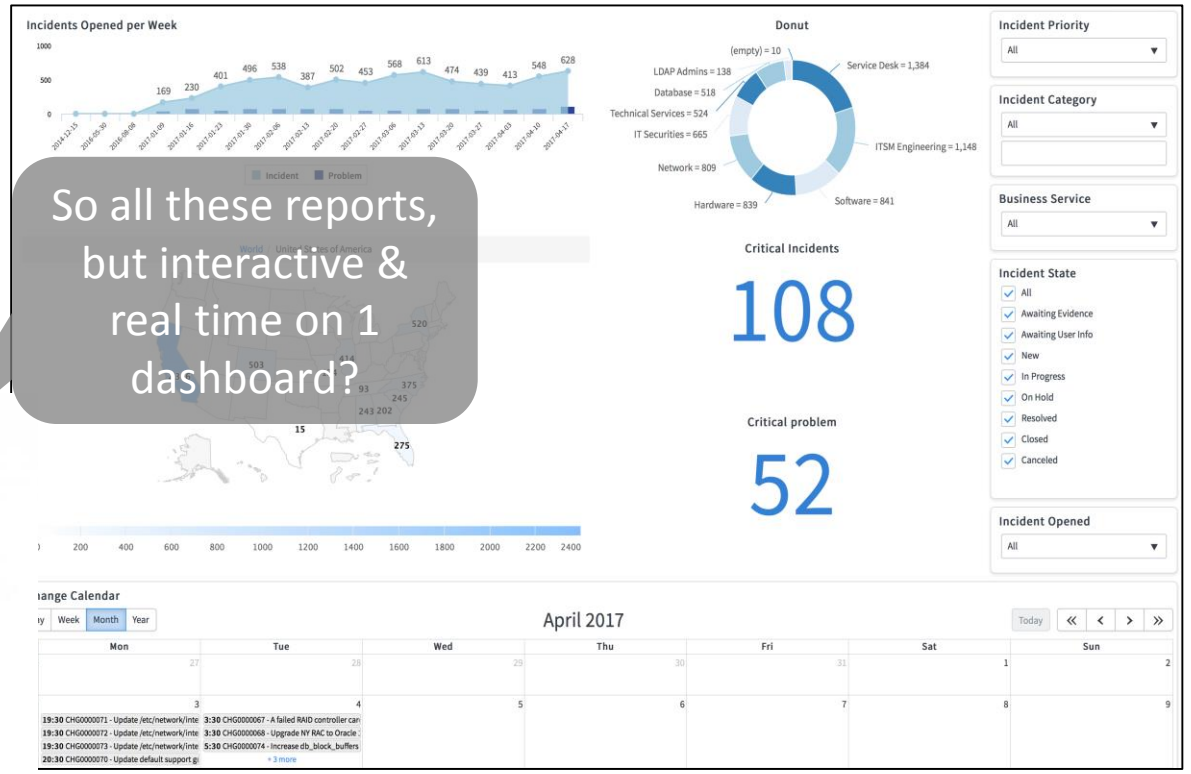
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Pre-Lab 6.0: Dashboards are Very User-Friendly

- Dashboards enable you to display multiple Performance Analytics, Reporting and other content widgets on a single screen.
- Use dashboards to create that story!
- Dashboards have many benefits over (Home)pages
  - Better codebase, higher performance
  - Drag-and-drop widgets
  - Easily snapped to a layout
  - Resize and fully responsive
  - All users can view them
  - They can be shared with other users





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Lab 6.0 Easy Editing a Dashboard

Timebox:
6 minutes

Use case:

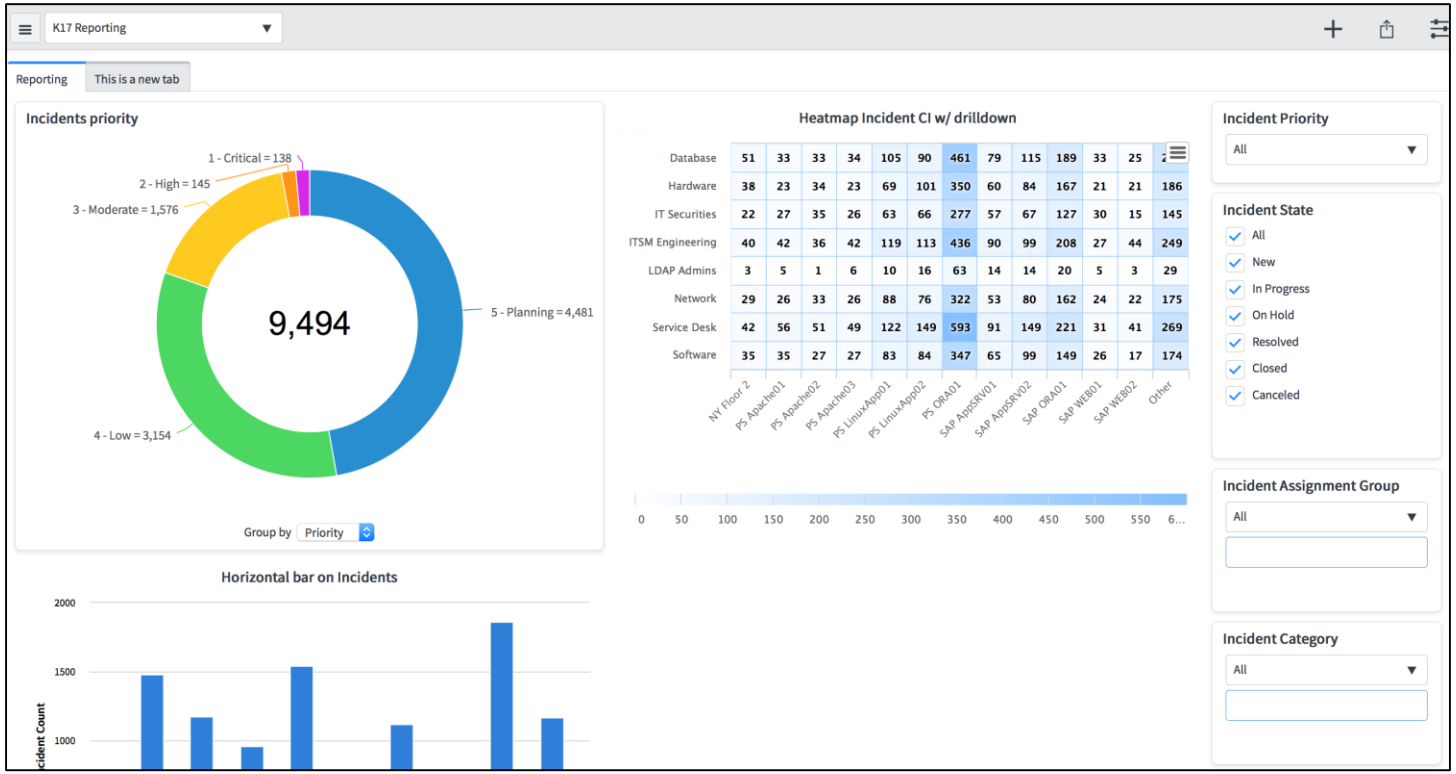
The incident management teams currently use many separate reports. Joey wants to combine all applicable reports on one dashboard.

- **Navigate to your Dashboard**
- **Add content to the Dashboard**
- **Drag & drop widgets and resize responsively**

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Lab 6.0 Result

Lab Success Verification (w/o lab challenges)



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Lab 7.0 Create a Multi-Dimensional Report

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Pre-Lab 7.0: Using Many Dimensions

- You can visualize data using multiple dimensions, not only having a score or two axis
- Examples of these are:
  - Multilevel pivot charts
  - Heatmap
  - Bubble chart



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Lab 7.0 Create a Multi-Dimensional Report

Timebox:
6 minutes

Use case:

Joey wants to create an impactful visualization to show the escalated problems within an assignment group. A bubble chart with size of the bubbles can quickly visualize a certain amount (extra dimension).

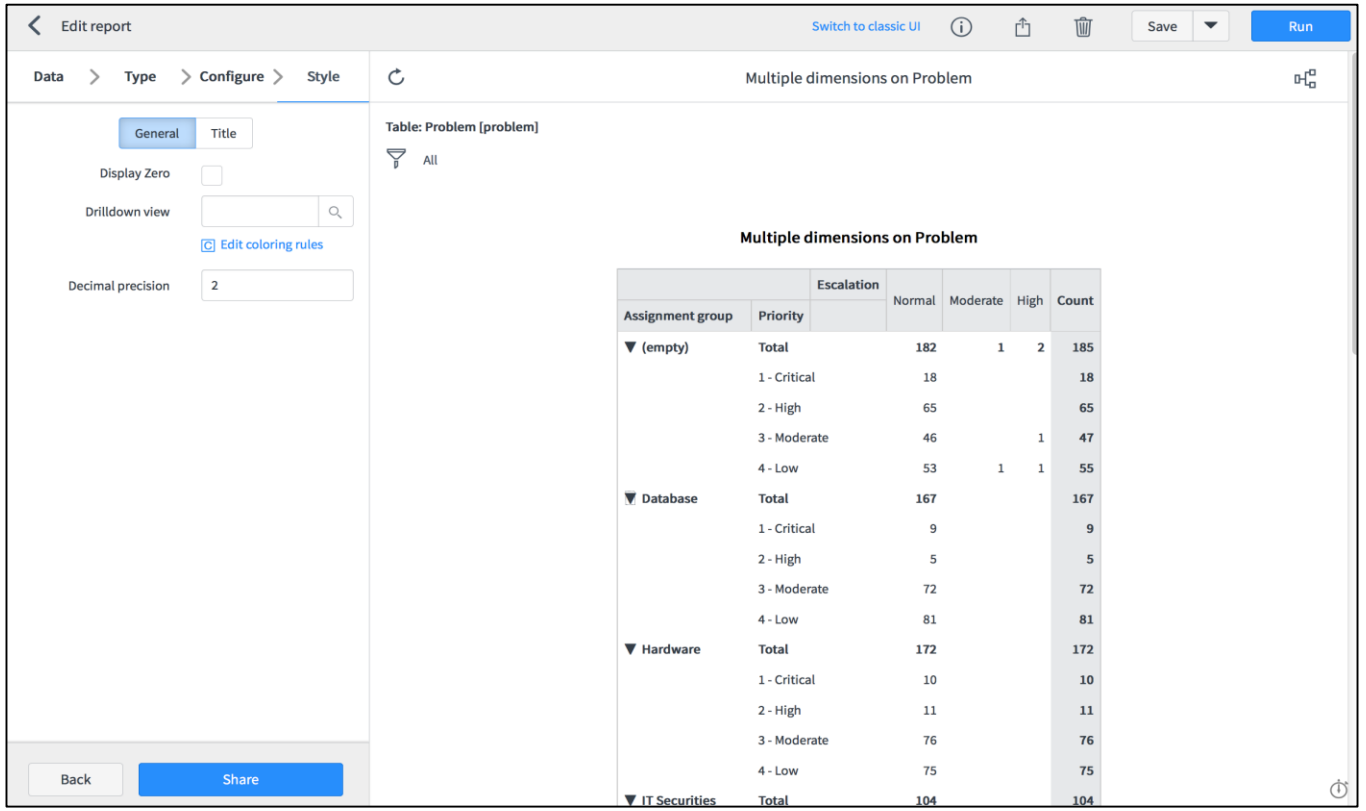
But Joey doubts if it is really meaningful as it is not representing many values.

- **Create a multi-dimensional chart from within the Report Designer guided workflow**
  - **Select the Data**
  - **Choose the Type**
  - **Set the Configuration**
- **Redo the report to a multi-level pivot chart to make it more meaningful**

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Lab 7.0 Result

Lab Success Verification (w/o lab challenges)



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Lab 8.0 Create a (Geo)Map Report

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Lab 8.0 Create a (Geo)Map Report

Timebox:
6 minutes

Use case:

Joey wants to share an overview of all the incidents and where they are registered. This is for a business decision on Service desk coverage for all time zones. The best way to create that insight is by making a Map report.

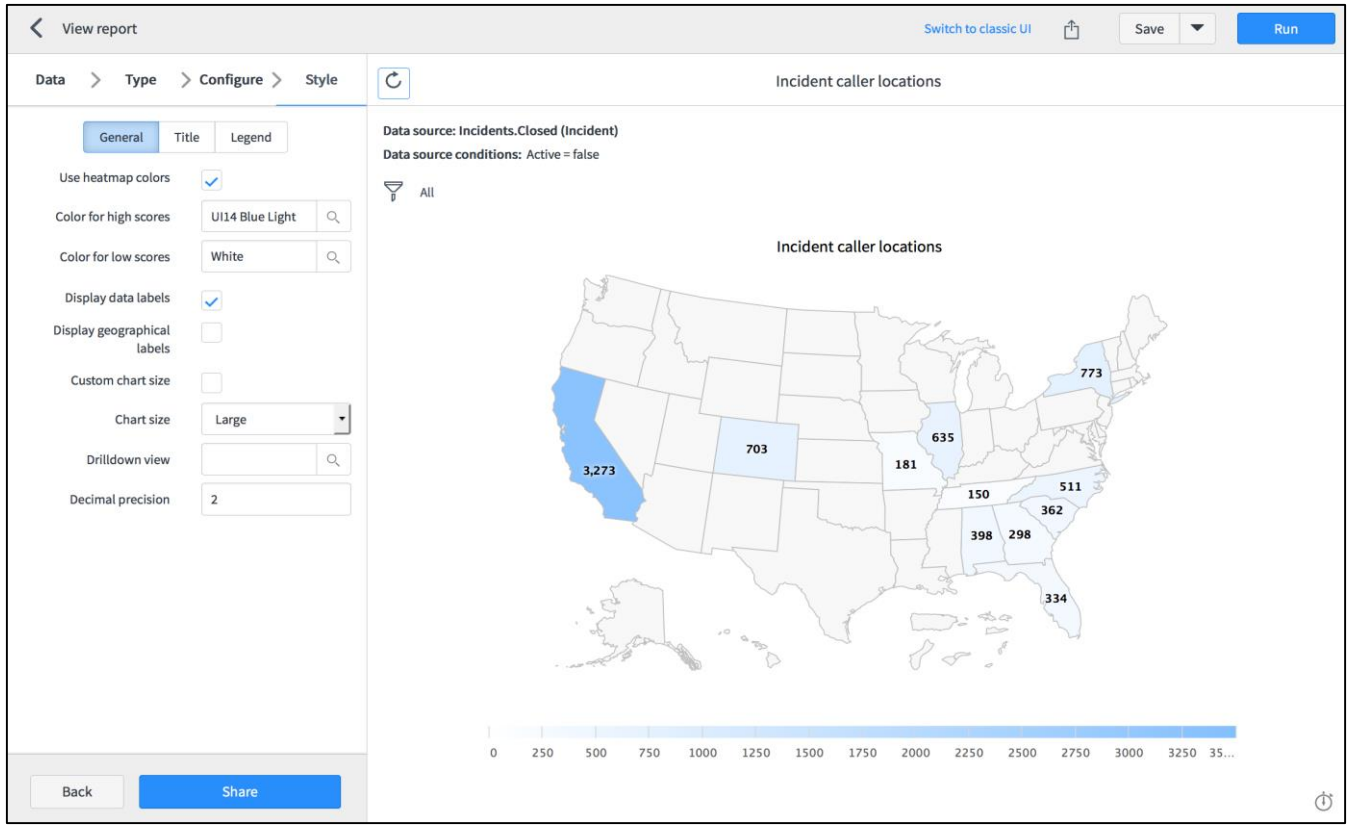
- **Create a Map report from within the Report Designer guided workflow**
  - **Select the Data**
  - **Choose the Type**
  - **Set the Configuration**

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

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Lab 8.0 Result

Lab Success Verification (w/o lab challenges)



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Lab 9.0 Create a Change Calendar

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Lab 9.0 Create a Change Calendar

Timebox:
4 minutes

Use case:

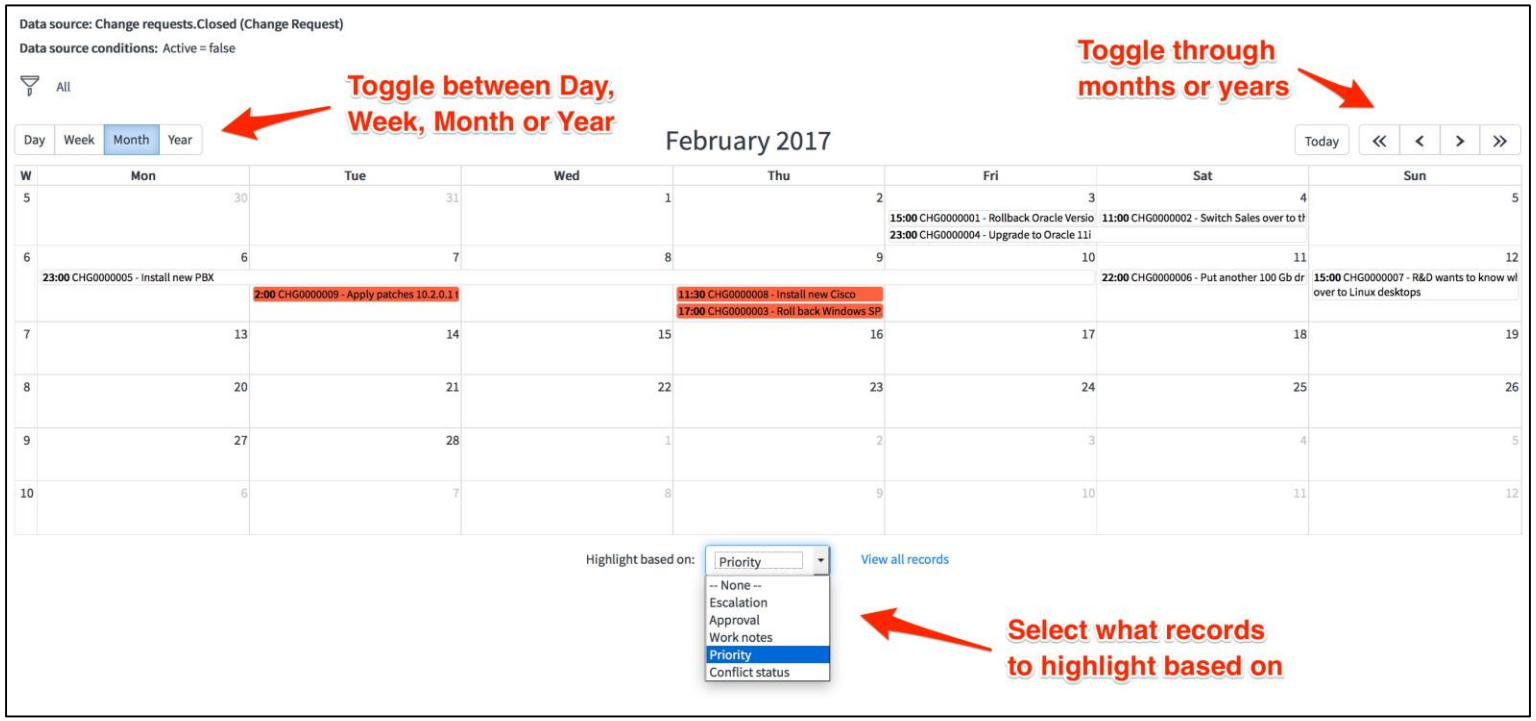
The change planning requested Joey to provide an insight on previously executed changes. The team wants to use that report to relate certain events to raised incidents without a suitable root cause.

- **Create a calendar from within the Report Designer guided workflow**
  - **Select the Data**
  - **Choose the Type**
  - **Set the Configuration**

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Lab 9.0 Result

Lab Success Verification (w/o lab challenges)



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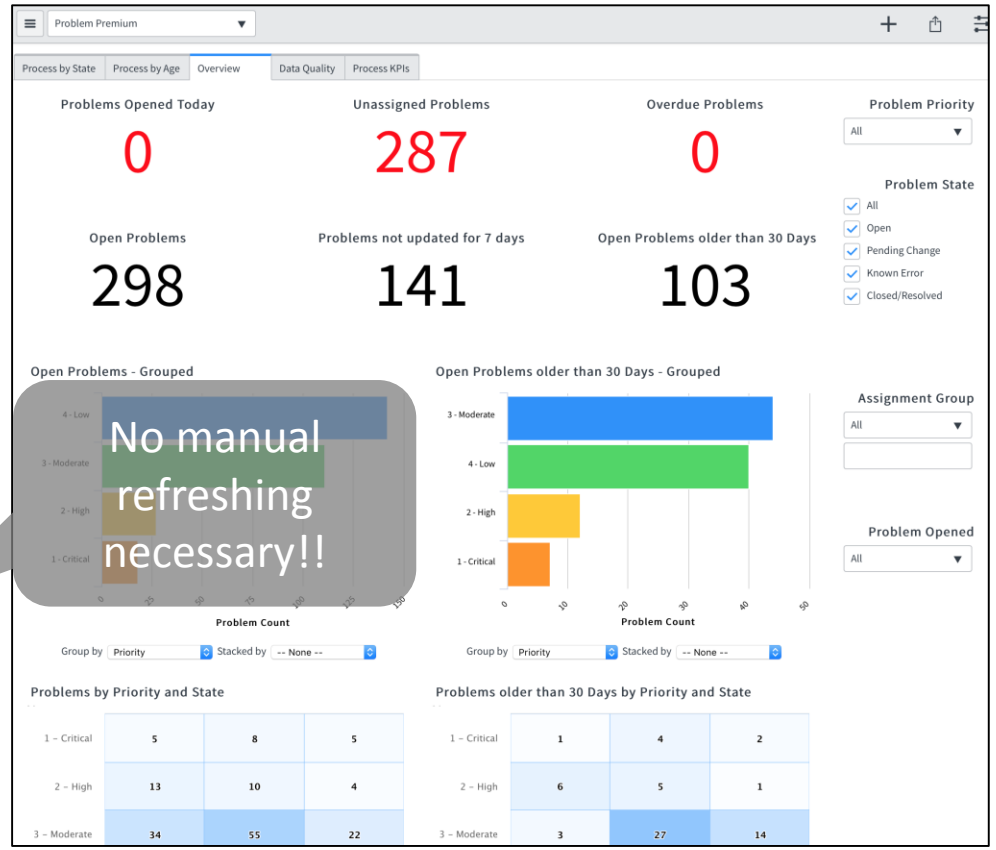
Lab 10.0 Real-Time Single Score Visual

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Pre-Lab 10.0: How Real-Time is Real-Time?

- One of the big benefits of having everything in platform: anytime you open or refresh a report you will see up-to-the-second real-time data
- Single score reports added to a dashboard can display without the need to refresh
- A so-called ‘record-watcher’ push mechanism pushes the last table count to the single score to always reflect real time





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Lab 10.0 Real-Time Single Score Visual

Timebox:
10 minutes

Use case:

Joey needs to add reporting widgets on the dashboard to really add value to Network teams using them. Their requirement is that the score should be always real-time, without manual refreshing.

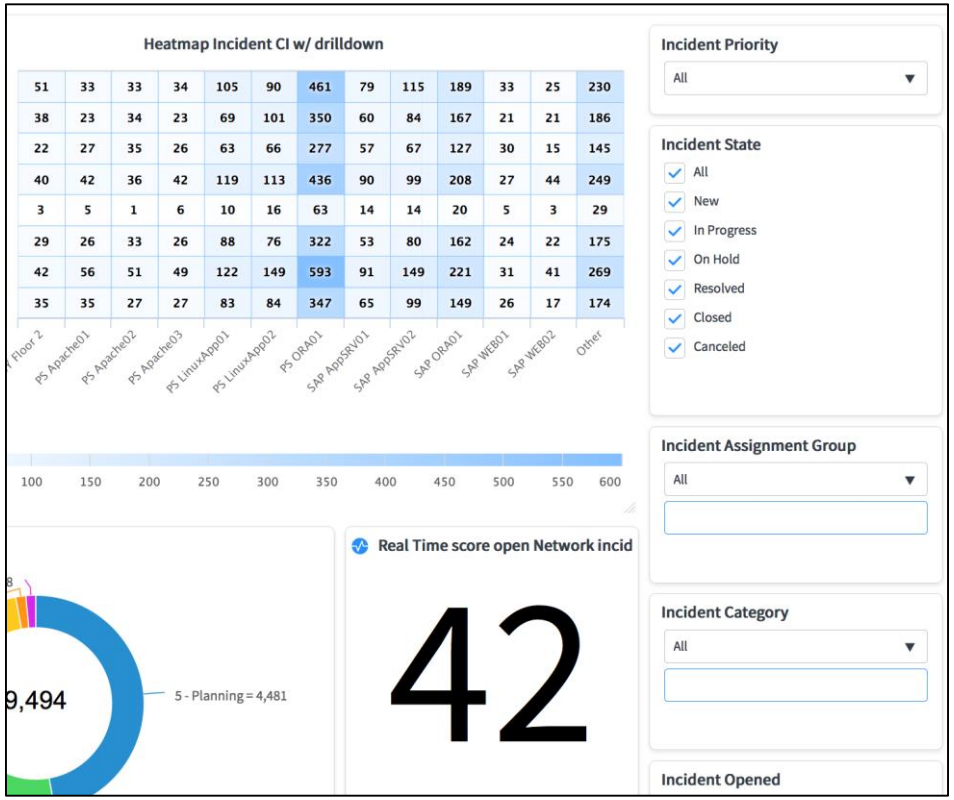
- **Create a single score from within the Report Designer guided workflow**
  - **Select the Data**
  - **Choose the Type**
  - **Set the Configuration**
- **Set a filter condition**
- **Add the visualization to the dashboard and set the real-time setting in the dashboard widget**

- **Lab Challenge 1 – Relate the Single score to the existing interactive filters**
- **Lab Challenge 2 – Relate the (Geo)Map report and donut chart to the dashboard interactive filters**

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Lab 10.0 Result

Lab Success Verification (w/o lab challenges)



Note:
Browser might need to refresh to follow real time & filter

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Lessons Learned

1. Think about your reporting strategy; we made Reports meaningful & actionable (think about the follow-up action)!
2. Basic report creation, best practices on how to set up the most used reports easily
3. Always share your report, either on a shared dashboard or as a shared report to another group / user
4. Make use of the in platform benefits being real-time, native, and secure. Show your reports on dashboards, service portal, publish them, or use the mobile app!



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Top Takeaways

1

Prepare your Reporting strategy

2

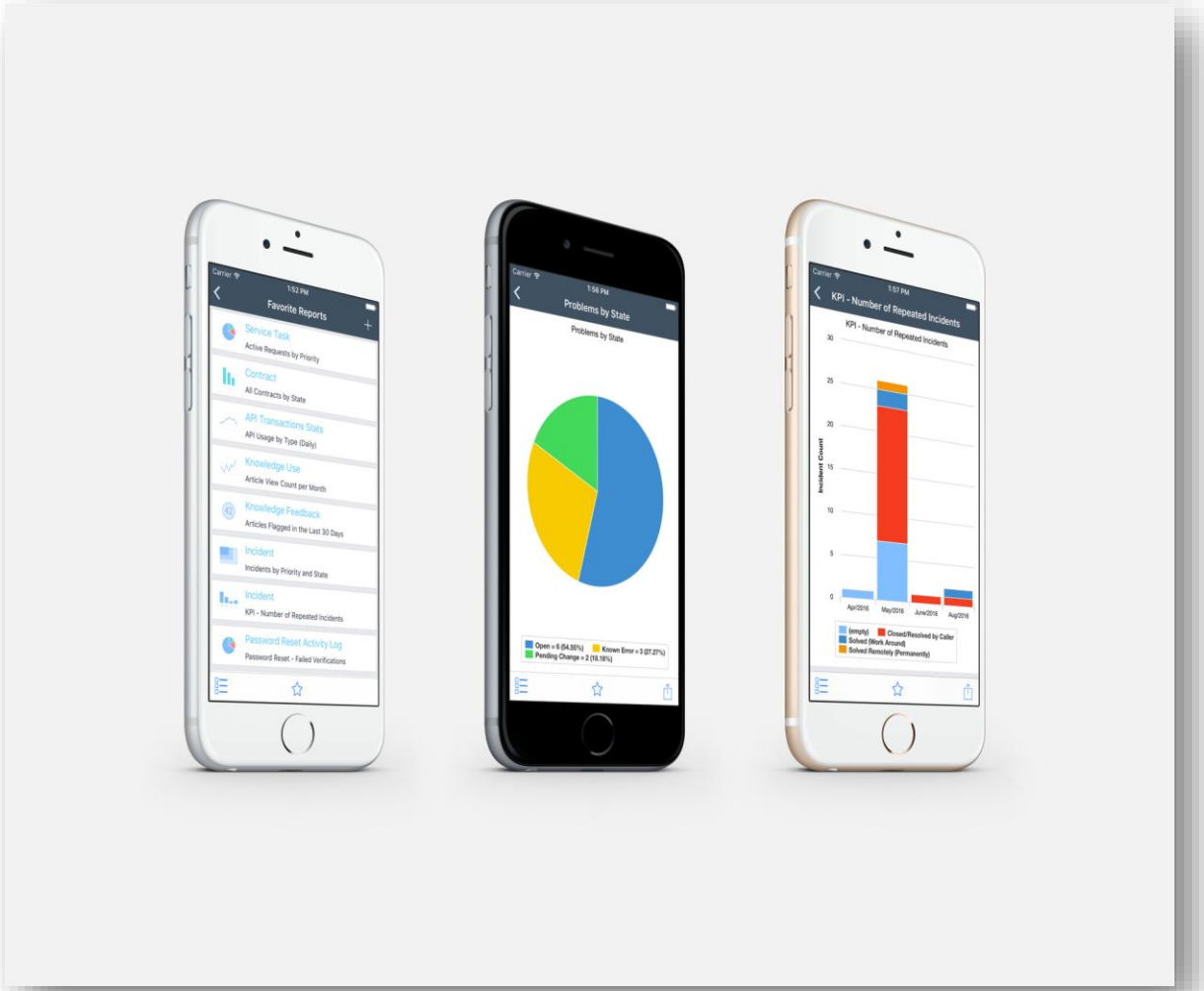
Leverage the in platform benefits (real-time, native, security)

3

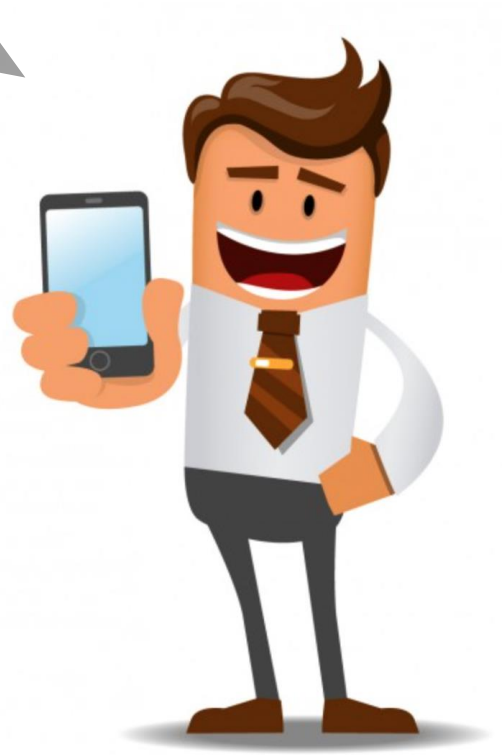
Share your reports!

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There’s an App for That!

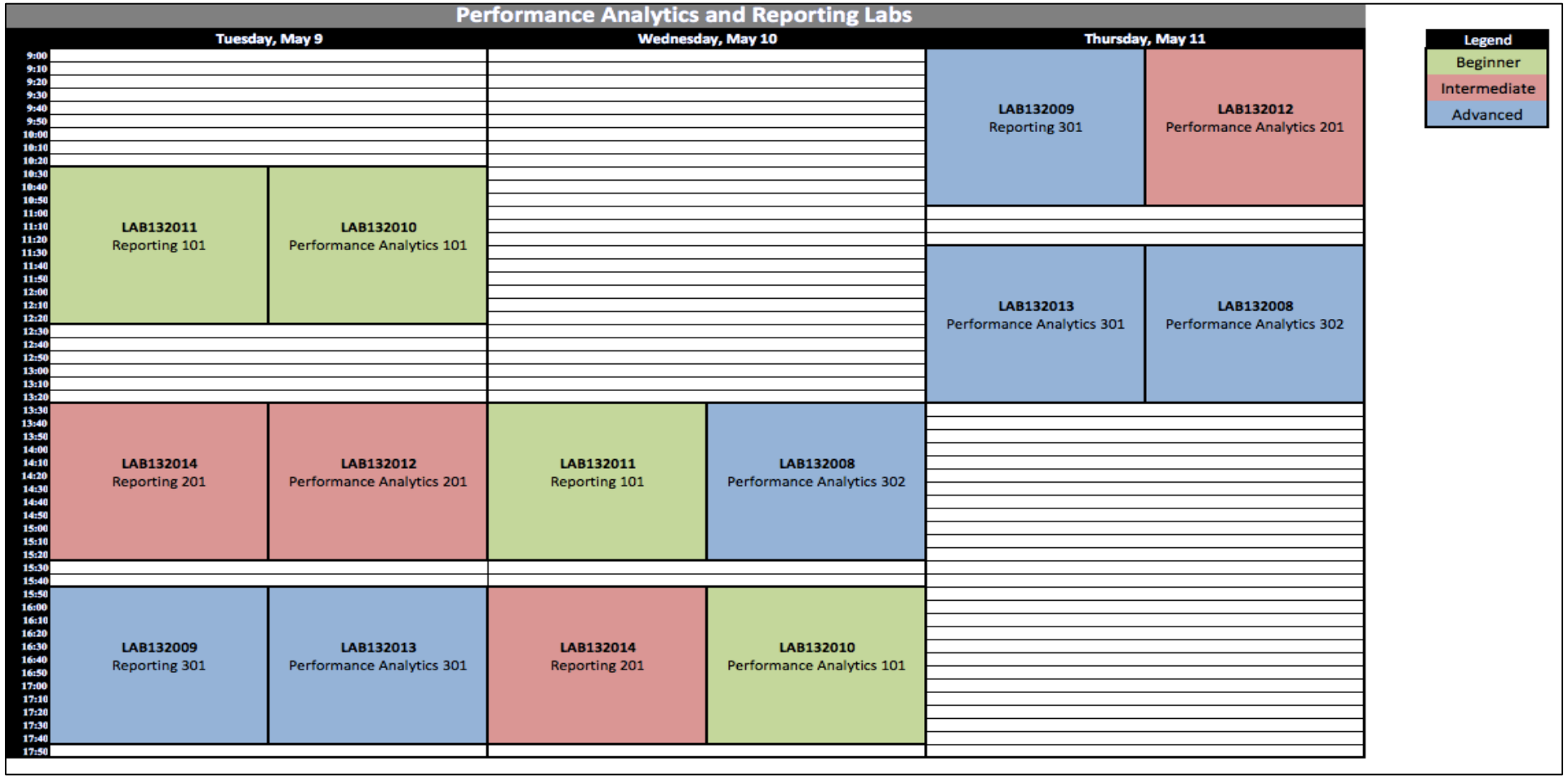


Use Reports in your ServiceNow app!!



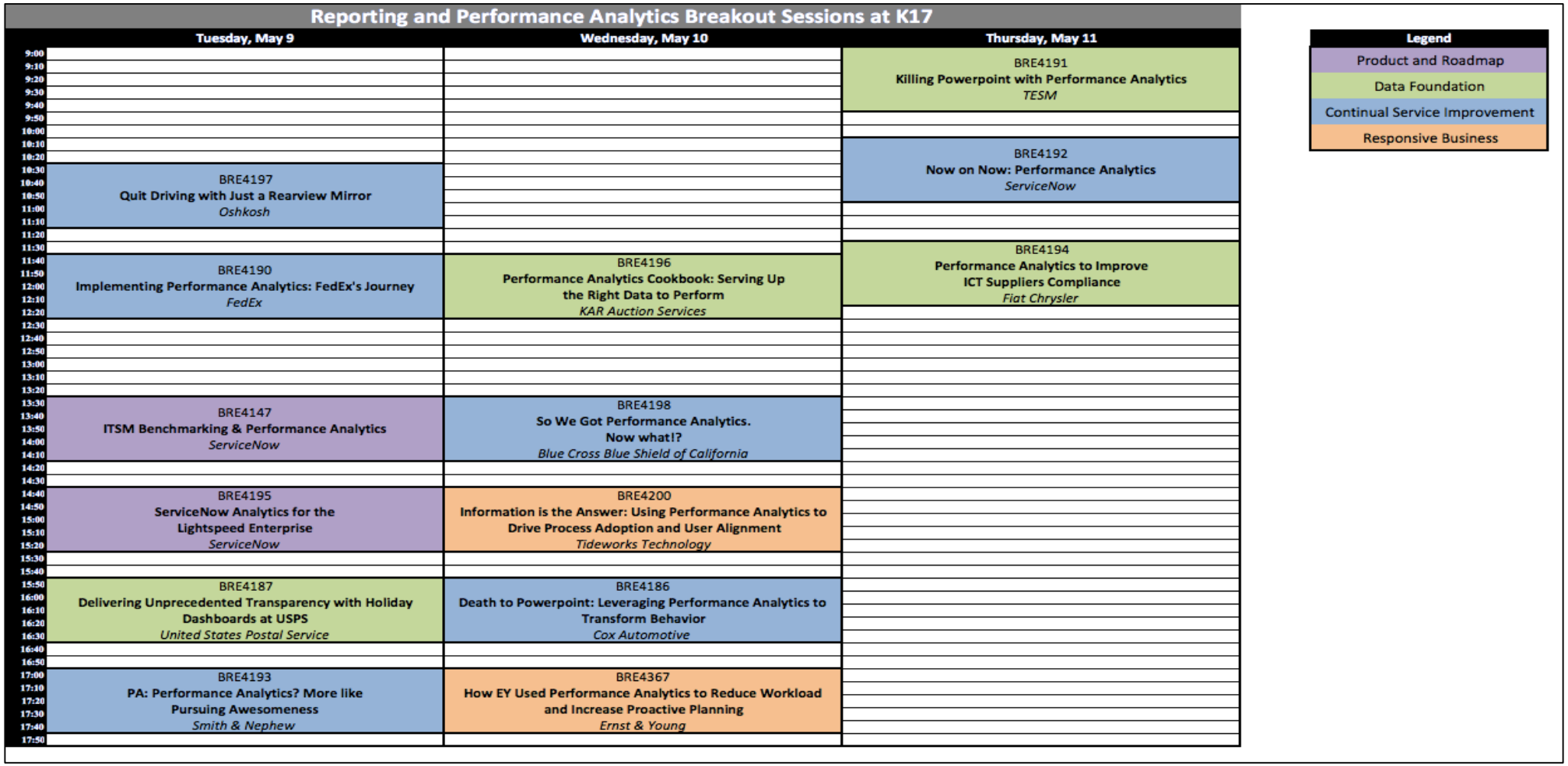
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Other Related Labs



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Other Related Keynotes



Reporting and Performance Analytics Breakout Sessions at K17

Tuesday, May 9	Wednesday, May 10	Thursday, May 11
		BRE4191 **Killing Powerpoint with Performance Analytics** *TESM*
BRE4197 **Quit Driving with Just a Rearview Mirror** *Oshkosh*		BRE4192 **Now on Now: Performance Analytics** *ServiceNow*
BRE4190 **Implementing Performance Analytics: FedEx's Journey** *FedEx*	BRE4196 **Performance Analytics Cookbook: Serving Up the Right Data to Perform** *KAR Auction Services*	BRE4194 **Performance Analytics to Improve ICT Suppliers Compliance** *Fiat Chrysler*
BRE4147 **ITSM Benchmarking & Performance Analytics** *ServiceNow*	BRE4198 **So We Got Performance Analytics. Now what!?** *Blue Cross Blue Shield of California*	
BRE4195 **ServiceNow Analytics for the Lightspeed Enterprise** *ServiceNow*	BRE4200 **Information is the Answer: Using Performance Analytics to Drive Process Adoption and User Alignment** *Tideworks Technology*	
BRE4187 **Delivering Unprecedented Transparency with Holiday Dashboards at USPS** *United States Postal Service*	BRE4186 **Death to Powerpoint: Leveraging Performance Analytics to Transform Behavior** *Cox Automotive*	
BRE4193 **PA: Performance Analytics? More like Pursuing Awesomeness** *Smith & Nephew*	BRE4367 **How EY Used Performance Analytics to Reduce Workload and Increase Proactive Planning** *Ernst & Young*	

Legend

- Product and Roadmap
- Data Foundation
- Continual Service Improvement
- Responsive Business

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What to Expect from Jakarta?!

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Thank You

Lab Sponsored by Microsoft Azure



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Robert Barmentloo
Product Manager Analytics & Reporting
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