knowledge17

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Lab Guide

Reporting 201:
Advanced Reports and Dashboards

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Lab Goal

Lab 1.1 Reporting on Metric Instances

As you start to create reports and visualizations on the data that lives in the ServiceNow platform, you are potentially going to run into situations in which the data you want does not live in a single table. In these situations, you need to create a database view.

A database view defines table joins for reporting purposes.

Numerous useful database views (over 20) are installed with the Database View plugin and the Database Views for Service Management plugin. These database views cover most metric reporting needs and greatly reduce the need to define new ones.

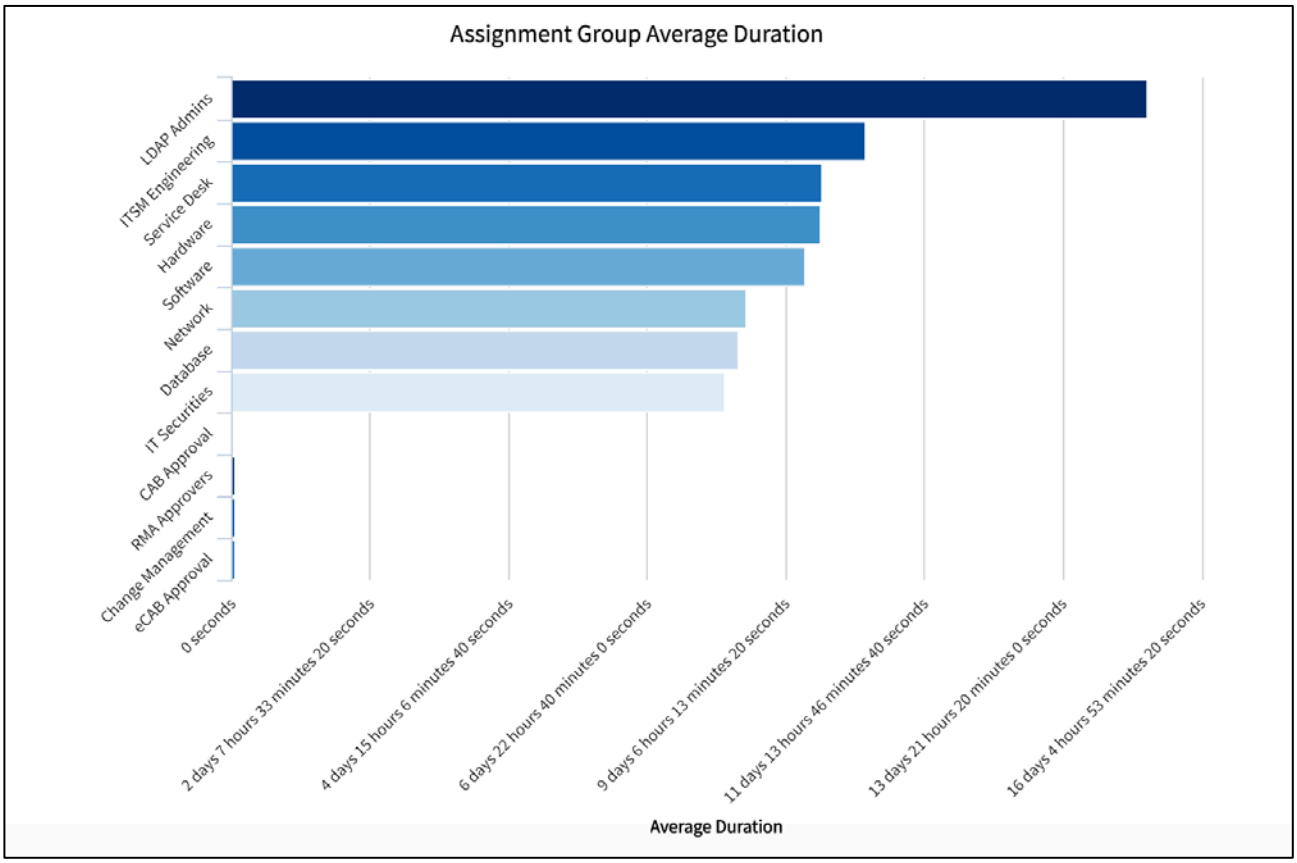
For example, a database view can join the Incident table to the Metric Definition and Metric Instance tables. This view can be used to report on incident metrics and may include fields from any of these three tables.

A metric measures and evaluates the effectiveness of IT service management processes.

For example, a metric could measure the effectiveness of the incident resolution process by calculating how long it takes to resolve an incident.

Sometimes a metric can be easily obtained from the data. For example, to find the number of incidents that were created today, a report will count the number of incidents in the incident table with a Created date of today. Often, however, metrics need to be gathered as data is updated. For example, determining how long an incident was assigned to a certain group requires collecting information about assignment changes and calculating the duration of each assignment.

In this lab, you build a visualization that shows the average time an incident spends within certain assignment groups. This requires using an out-of-the-box view that joins 3 tables – incident, metric definition, and metric instance tables.



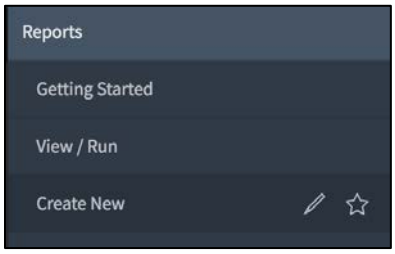
Log On to Your Training Instance

1. Navigate to the unique URL provided to you and log in using the user credentials from the cover of this guide. (**brian / Knowledge17** – case sensitive password)

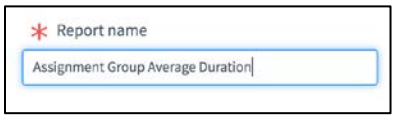
2. Search for **Reports** in the Navigation Search Bar.



3. Find and click **Create New** in the Reports application.

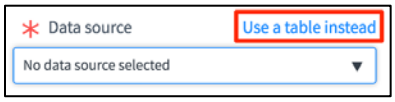


4. Enter **Assignment Group Average Durations** as the Report Name.



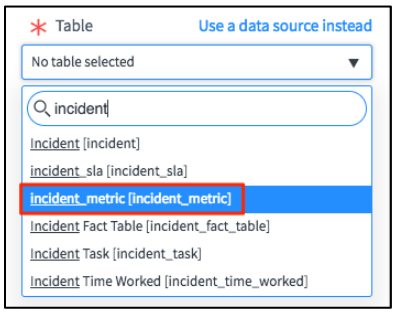
5. Click the **Use A Table Instead** link to allow you to select a Table to report from.

   Note: The default setting allows you to choose from Report Sources and Performance Analytics Indicator Sources. Both are predefined data sets for creating reports that allow you to reuse sets of filter conditions.



6. Search for and select the **incident_metric** table.

7. The incident metric table is a database view that combines the Metric Definition table, the Metric Instance table, and the Incident table. This view allows you to report on different metrics applied to incident records. Specifically, the how long an incident is sitting with an assignment group.



8. Look at the report that comes back and notice that different Metric Definitions are available. **Assigned to Duration** captures the amount of elapsed time between when an incident is assigned to a group and its assignment to an individual. We are going to be working with the Assignment Group definition that captures the amount of time an incident sits with an Assignment Group.


Incident Metrics

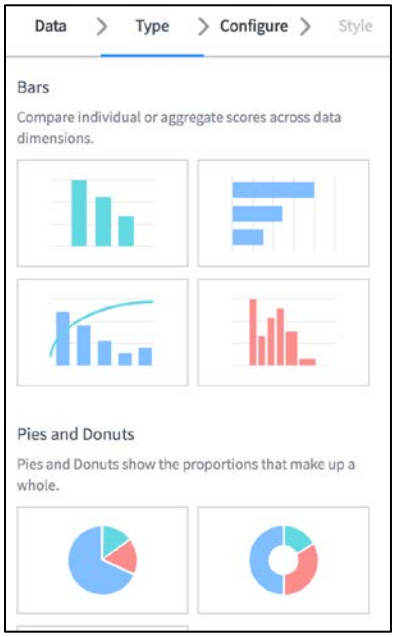
1 to 20 of 139769

Number	Category	Priority	Incident state	Escalation	Definition	Value
INC0001175	Software	5 - Planning	Closed	Normal	Assigned to Duration	(empty)
INC0001175	Software	5 - Planning	Closed	Normal	Assignment Group	Hardware
INC0001561	request	5 - Planning	Closed	Normal	Assigned to Duration	(empty)
INC0001561	request	5 - Planning	Closed	Normal	Assignment Group	ITSM Engineering
INC0006104	Software	5 - Planning	Closed	Normal	Assigned to Duration	(empty)
INC0006104	Software	5 - Planning	Closed	Normal	Assignment Group	Hardware
INC0000218	request	5 - Planning	Closed	Normal	Assigned to Duration	(empty)

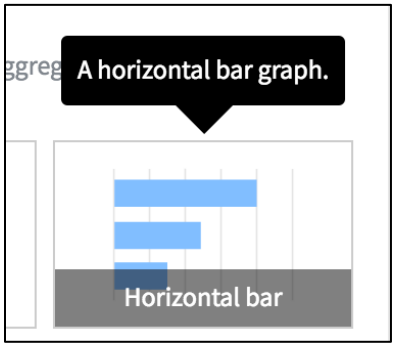
9. Click **Next** in the lower-right corner to move to the next step.



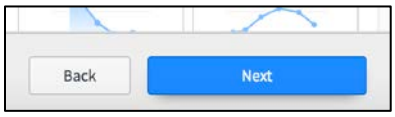
10. In the **Type** section of the Report Designer, scroll through the 20 plus different types of available visualizations.



11. Select the **Horizontal Bar** chart because you will rank the Assignment Groups by their Average Duration.

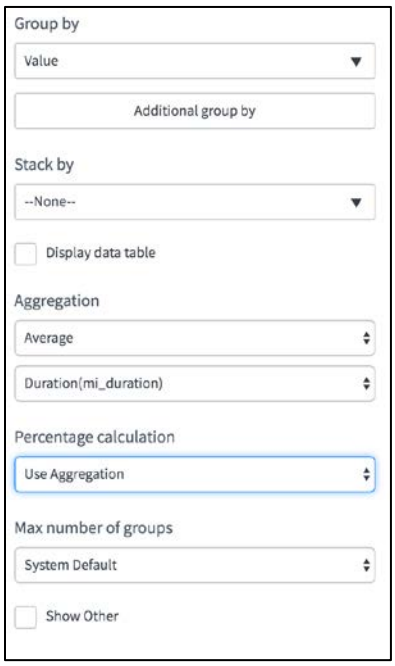


12. Click the **Next** Button to move to the Configure section of the Report Designer.



13. **Configure** the following values in the report:

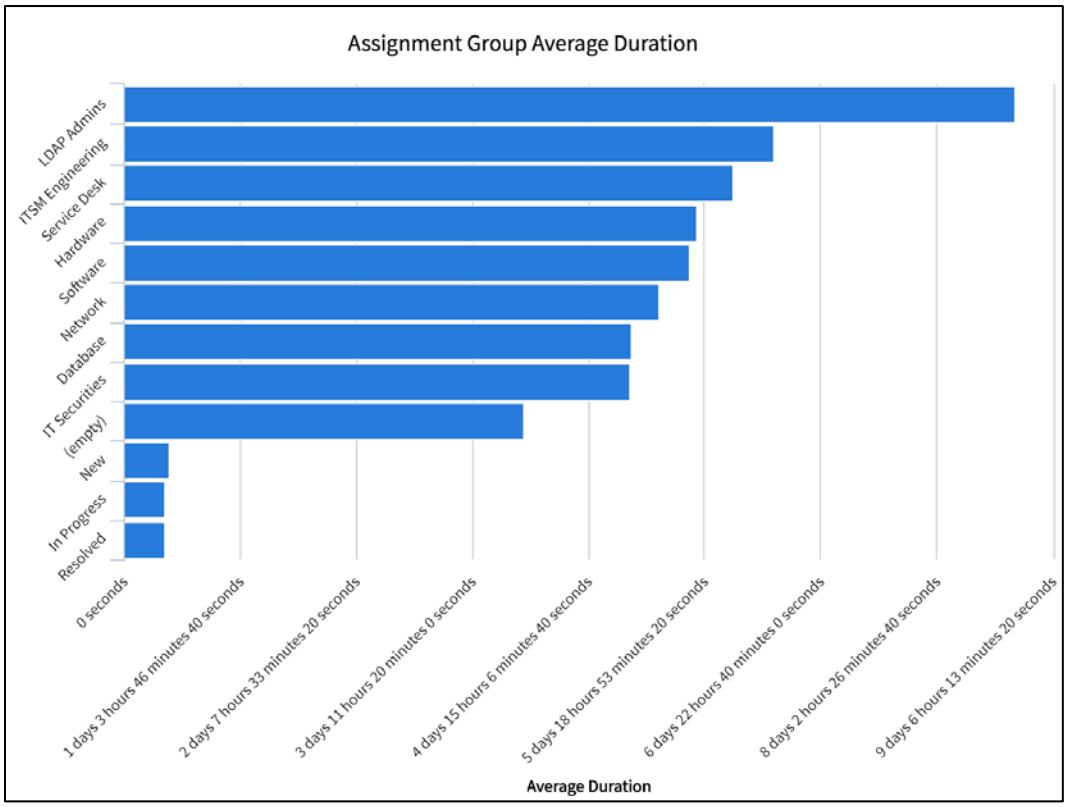
    Group by: Value – the is the value of the Metric Instance, in our case it will be the **Assignment Group**
    Stack by: **None**
    Aggregation: **Average**
    Aggregation Field: **Duration(mi_duration)** – this will get us the duration value for the individual records in the metric instance table. We can identify that this field is in the Metric Instance table by the prefix(mi).
    Percentage calculation: **Use Aggregation**
    Max number of groups: **System Default**
    Deselect Show Other



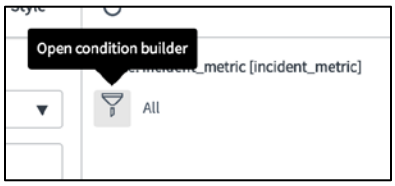
14. Save the report by clicking **Save** in the upper-right section of the Report Designer.



15. Investigate the chart. Notice the first several values are assignment groups. As you move down the chart, some values appear that are not assignment groups but states (New, In Progress, Resolved). Why is that? Because the metrics instance table captures individual records for different metric definitions. You need to specify which metric definition you want to capture in our filters. Do that now.



16. Open the **Condition Builder** by clicking on the filter icon in the upper-left corner of the chart frame.

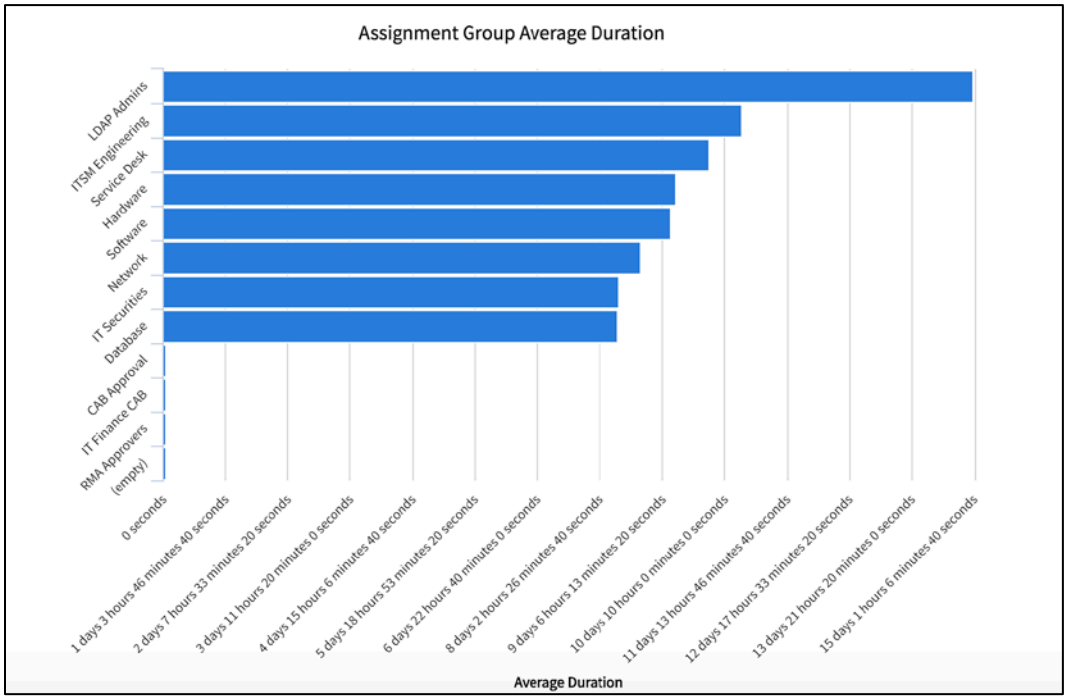


17. For the first condition choose the following:

    Field: **Definition**
    Operator: **Is**
    Value: **Assignment Group**

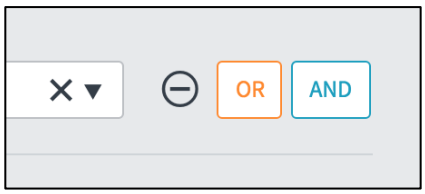


18. Click **Run**. Notice the State values have disappeared. You now only see Assignment Groups.



19. Click the **AND** operator.

    Note: In general, an incident record is resolved by changing the state to **resolved**, and a business rule sets the resolved date. With the state change on the incident record, the metric instance record for the incident state duration that is still open, is updated with an end date and a duration (and a new record is created for the state **resolved**). But the open metric instance record for the assignment group remains open. For your use, the duration for the last assignment group should only be calculated up to the resolved date of the incident. To accurately capture this, you need to add another filter condition.



20. In the **Condition builder** set the following values:

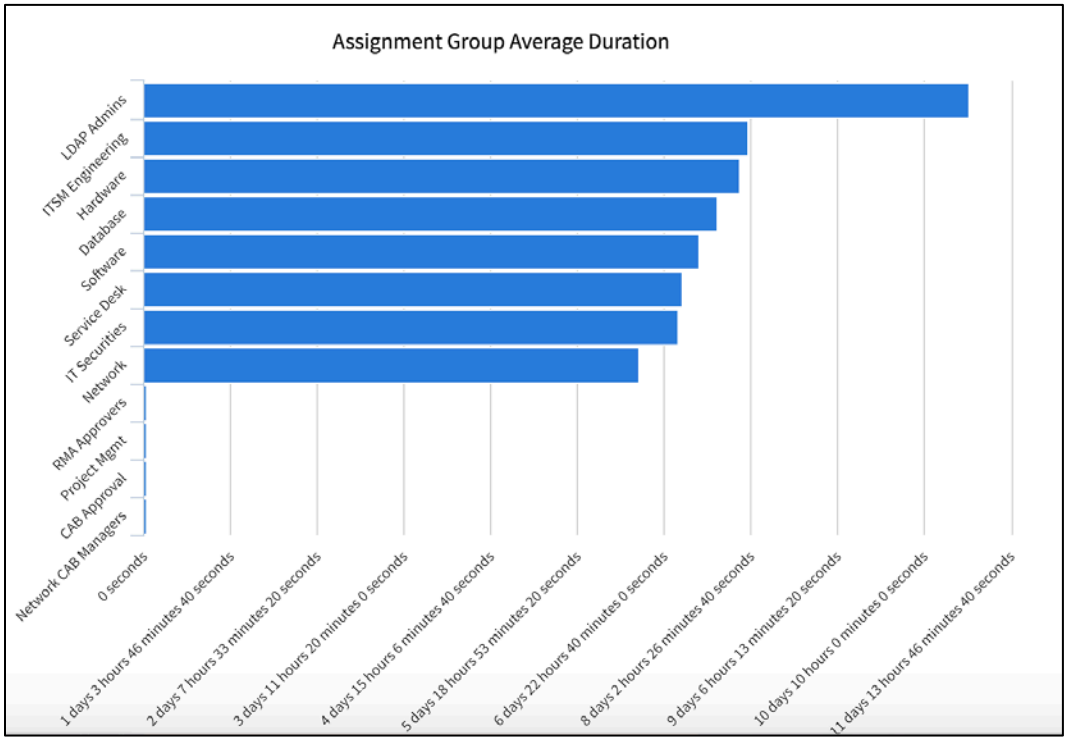
    Field: **Start** – this is the start time of the metric instance
    Operator: **Is more than**
    Time Value: **0 Hours Before**
    Comparison Time Value: **Resolved**



21. Click the **Save** button.

Lab Success Verification

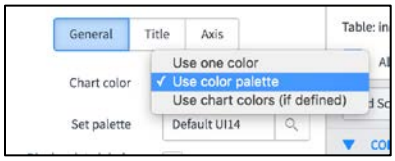
1. Your chart should look like the example.



Lab Challenge 1- Style the Chart

1. Now style the chart a little. Click the **Next** button in the lower-left of the Report Designer.

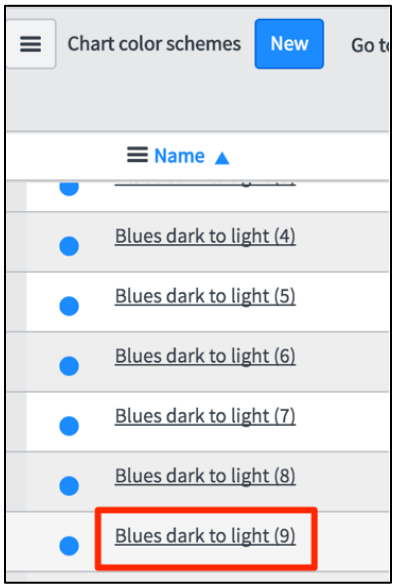
2. Select **Use color palette** for the Chart color option.



3. Click the magnifying glass to the right of the Set palette value.



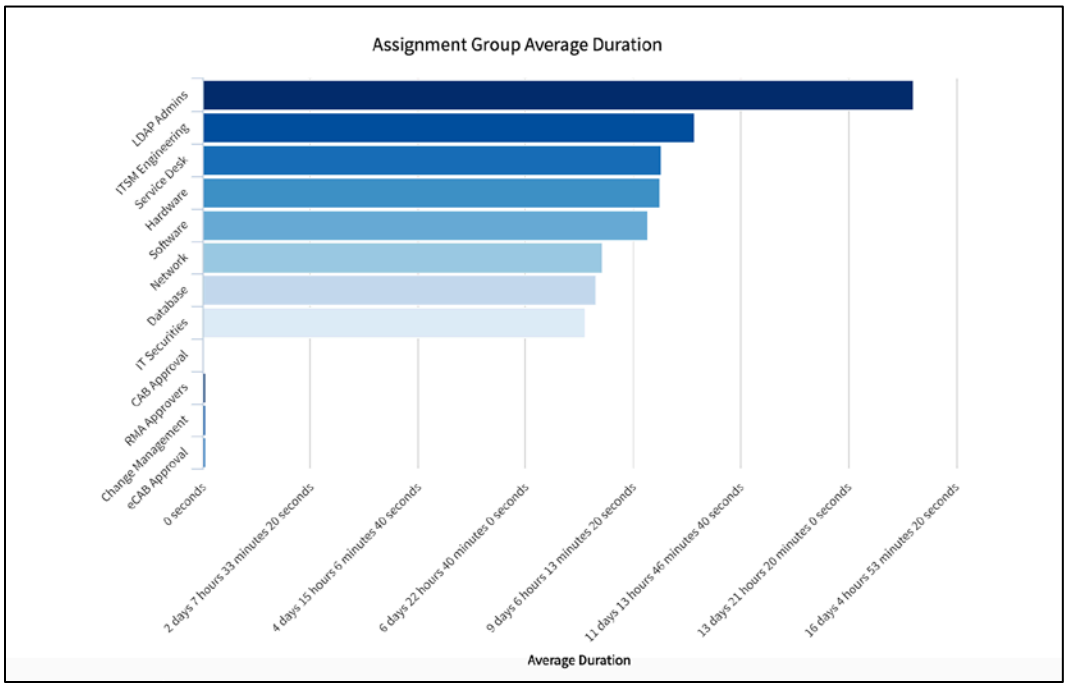
4. Choose **Blues dark to light (9)** in the Chart color schemes dialogue window.



5. Click **Save**.

Lab Success Verification

1. Your chart should look like the example.



Lab Goal

Lab 1.2 Report Ranges

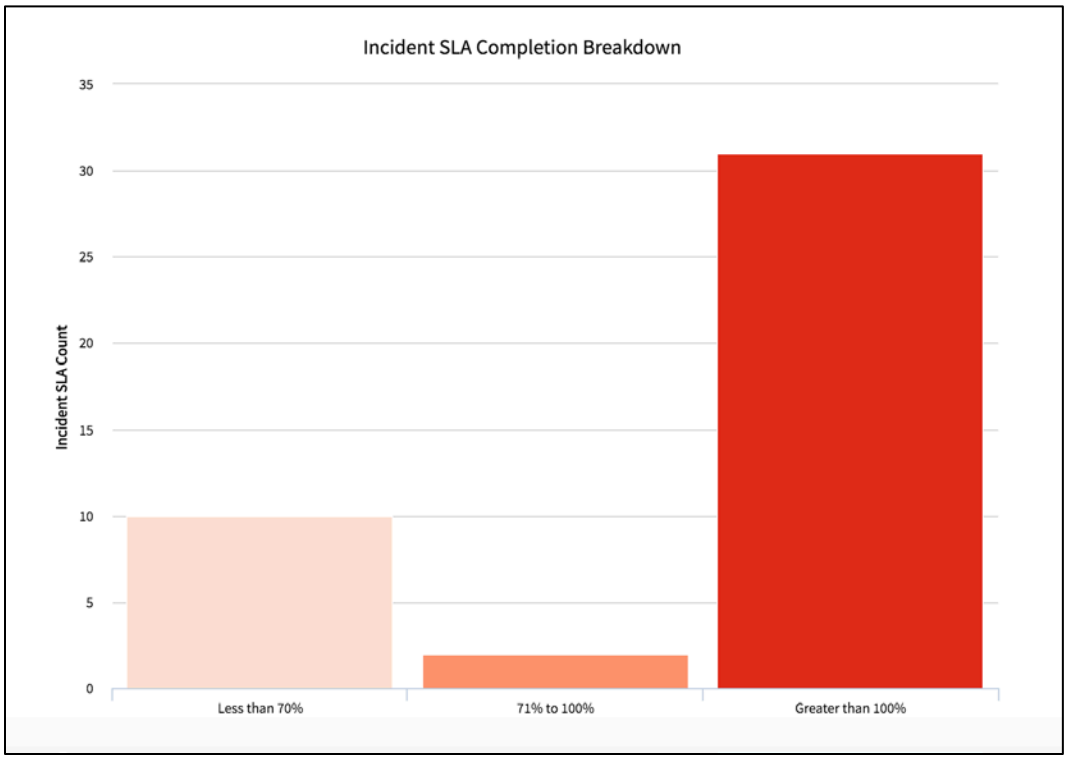
A report range is used to define data intervals in bar and pie charts.

In this lab, you create a report range that buckets SLA tasks by the percent completion to help us better understand which SLAs may need adjustment. To do this, use another database view to build the report.

Note: Report ranges work with elements that hold only dates, lists, or integers. Report ranges can be globally applied to all date type fields (date, due date, duration, date/time, date time), or you can limit report ranges to a specific table.

Note: Requires a **report_admin** role.

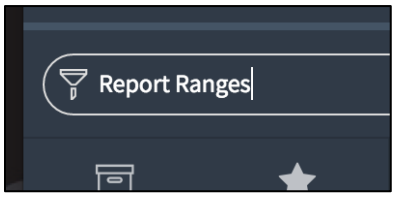
Note: Use report ranges to better organize information for business user.



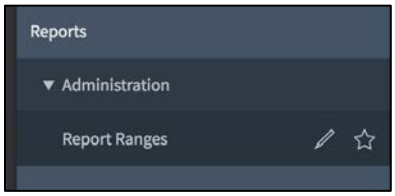
Create Report Ranges

Create 3 ranges (buckets) for the SLA completion percentages. The first is for all the SLA tasks that completed between 0 and 70%, the second for those tasks completed between 70% and 100%, and the third for those that breached and were over 100% of their SLA completion percentage.

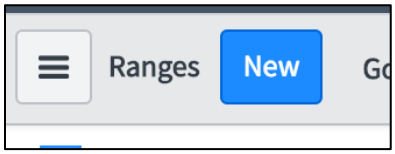
1. Type **Report Ranges** into the Navigation Search Bar.



2. Select **Report Ranges** in the Reports application.

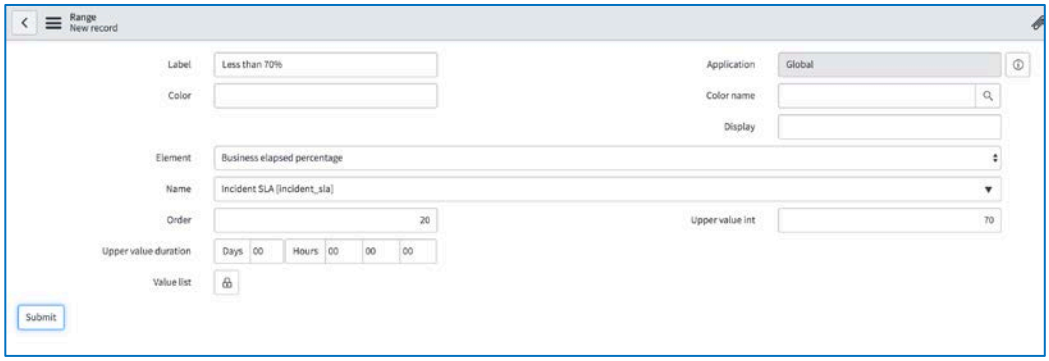


3. Click the **New** button in the upper-left of the screen.



4. Enter the following values in the **Report Range** record:

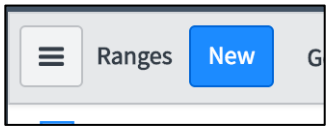
   Label: **Less than 70%**
   Name: **Incident SLA[incident_sla]**
   Element**: Business elapsed percentage**
   Order: **20**
   Upper value int: **70**



Note: You can set color values, but for this exercise leave them blank.

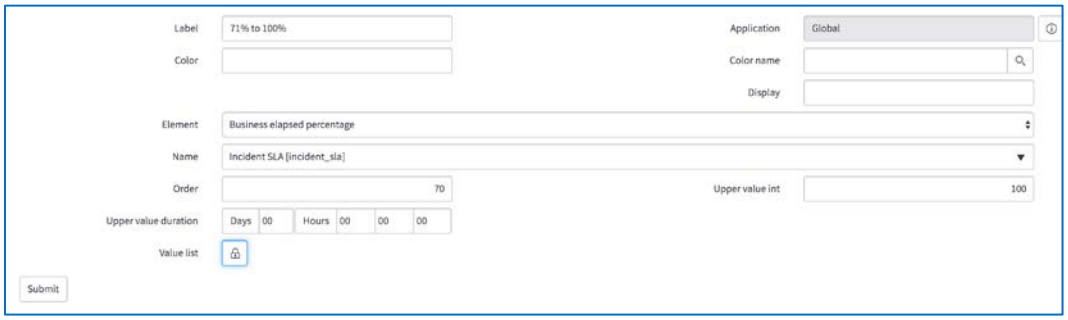
5. Click **Submit**.

6. Click **New** in the upper-left corner.



7. In the new **Report Range** record enter the following values:

   Label: **71% to 100%**
   Name: **Incident SLA[incident_sla]**
   Element: **Business elapsed percentage**
   Order: **70**
   Upper value limit: **100**

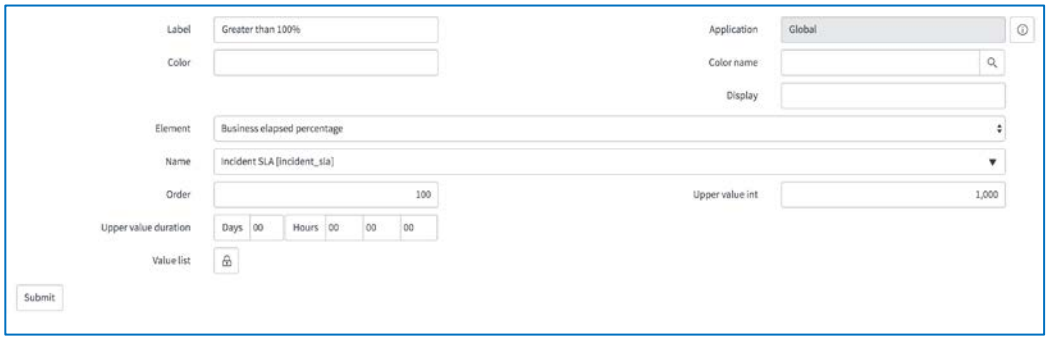


8. Click **Submit.**

9. Click **New** to create the final Report Range record.

10. Enter the following values:

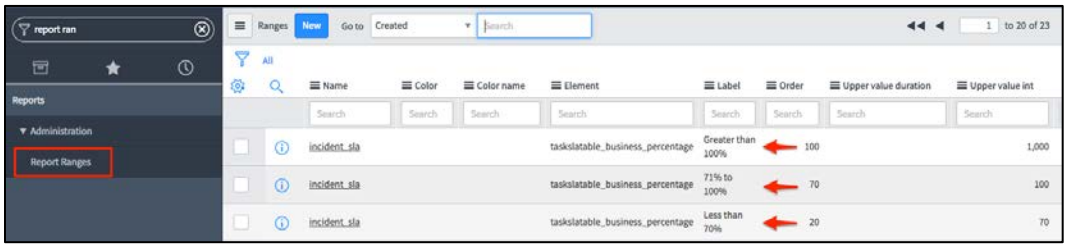
    Label: **Greater than 100%**
    Name: **Incident SLA[incident_sla]**
    Element: **Business elapsed percentage**
    Order: **100**
    Upper value int: **1000**



11. Click **Submit**.

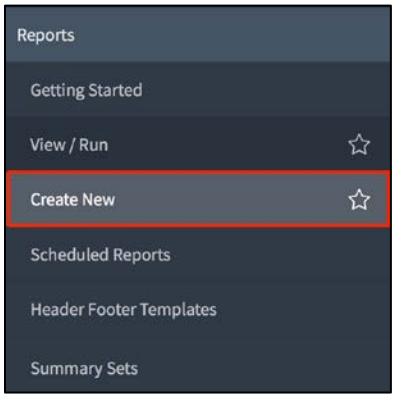
Lab Success Verification

1. Navigate to **Reports** > **Report Ranges** list and check it contains the newly created ranges as shown below.



Create the Report

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



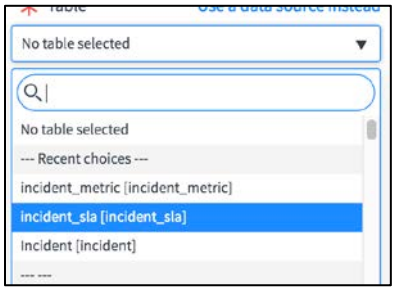
2. Enter **Incident SLA Completion Breakdown** as the Report name.



3. Click the **Use A Table Instead** link to select a Table to report from. The default setting allows you to choose from Report Sources and Performance Analytics Indicator Sources. Both are predefined data sets for creating reports that allow you to reuse sets of filter conditions.



4. Search for and choose **incident_sla** as the Table.



5. Click the **Next** button in the lower-left corner of the Report Designer.



6. Select the Vertical Bar chart from the over 20 plus chart types available to you.

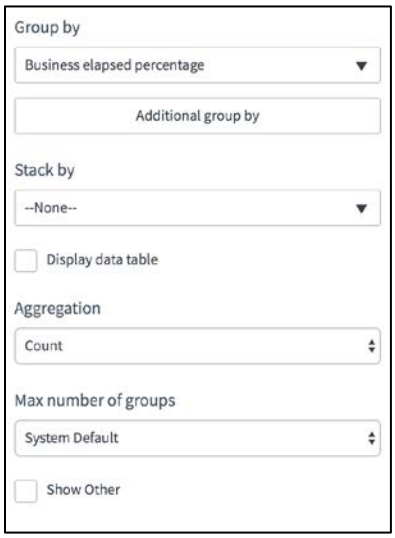


7. Click the **Next** button in the lower-right corner of the Report Designer



8. In the **Configure** panel set the following values:

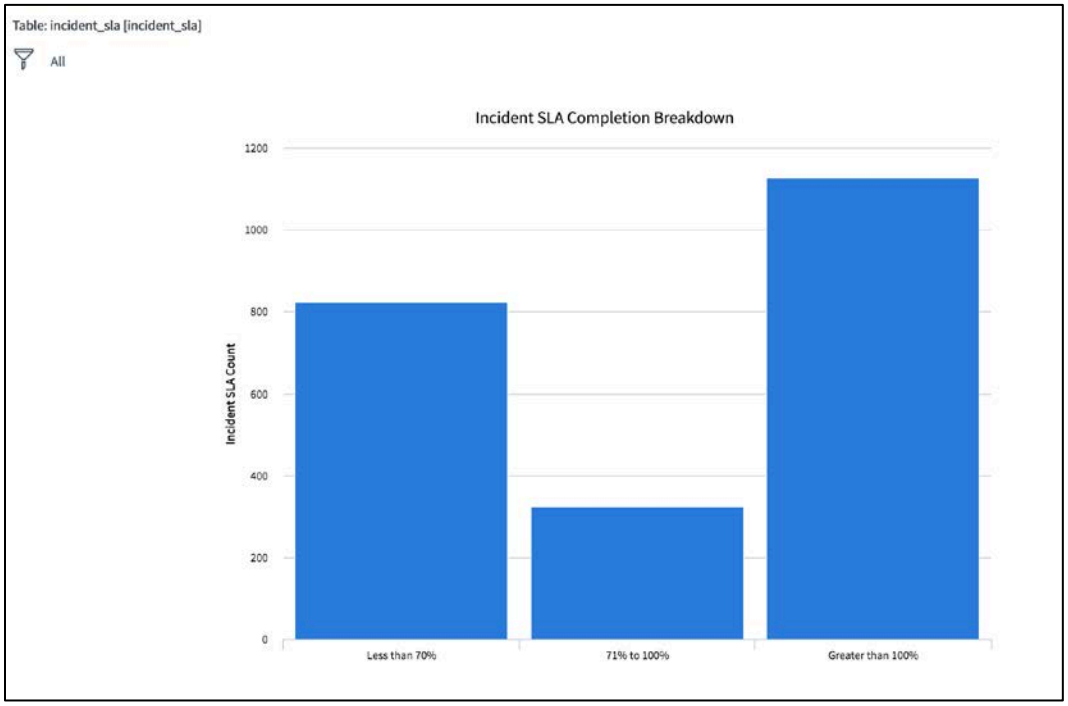
   Group by: **Business elapsed percentage**
   Deselect the Show Other box.



9. Click **Save**. Notice in the chart that although you had a wide range of percentages in the list view, you have now bucketed them into the 3 report ranges.

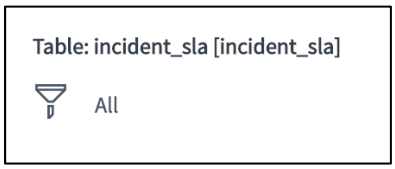
Lab Success Verification

1. Your chart should look like the example.



Lab Challenge 1 – Customize Report

1. Add a filter to only focus on the incidents that are not yet resolved. Click the **filter** icon in the upper-left of the chart panel.



2. In the **Condition Builder** enter the following values:

3. Field: **Resolved**
   Condition: **is empty**



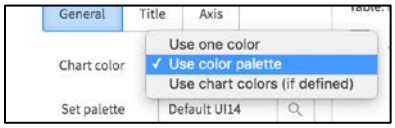
4. You are now looking at the open tasks and where they stand from a completion percentage standpoint.

5. Click **Save**.

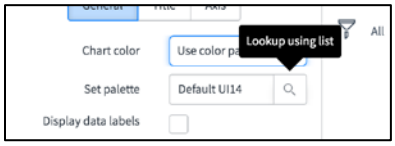
6. Click **Next** to move the Style portion of the panel.



7. Change the Chart color value to **Use color palette**.



8. Click the **magnifying glass** next to the value for Set palette.



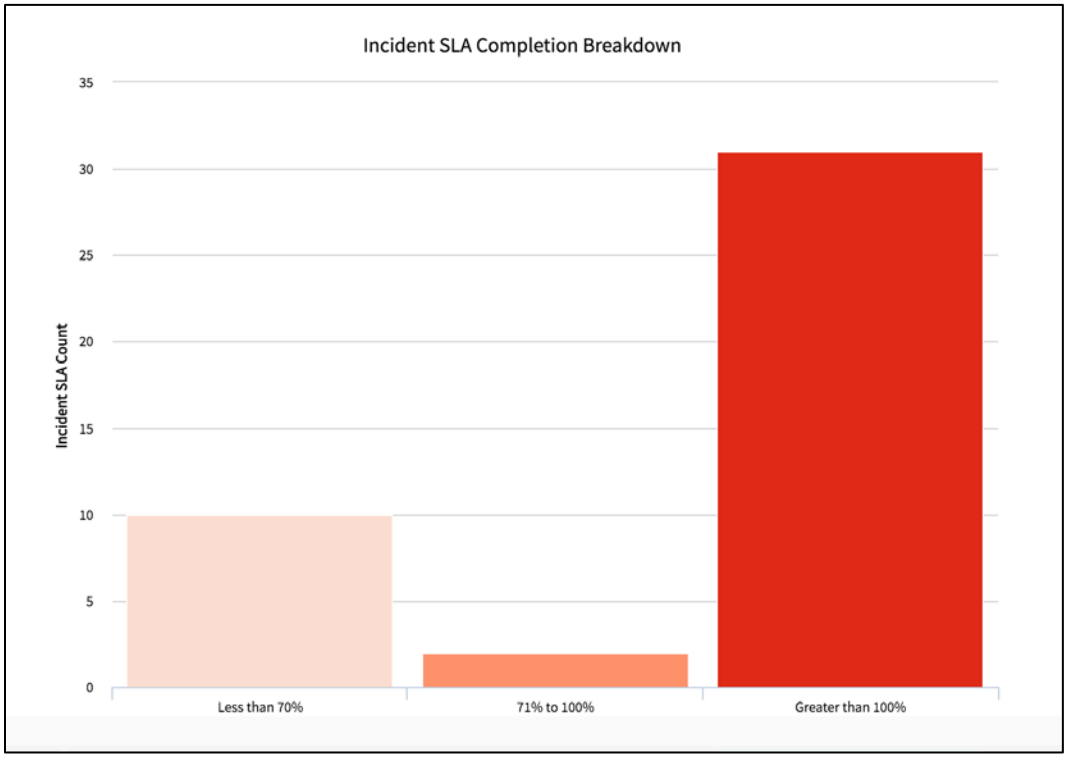
9. Choose **Reds light to dark (3)** in the Chart color schemes pop-up window. It should be on the last page.



10. Click **Save**.

Lab Success Verification

1. Your chart should look like the example.



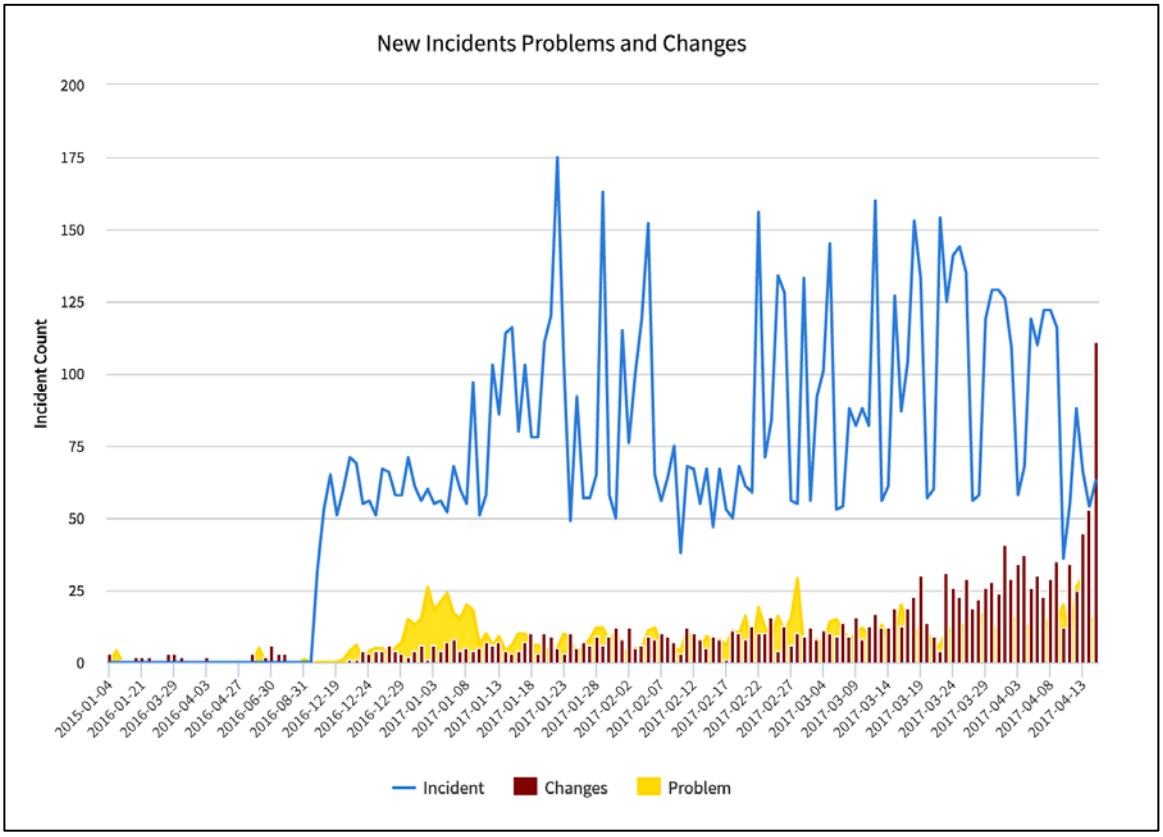
Lab Goal

You can create reports that display multiple datasets from various tables within a single chart. By adding multiple datasets into a single visualization, you give the user the ability to see patterns and trends across different areas of the business.

Lab 1.3
Multi Data Set Reports

Note: Multiple data sets requires Performance Analytics Premium.

Note: The following report types support multiple data series: bar, horizontal bar, line, column, area, spline.

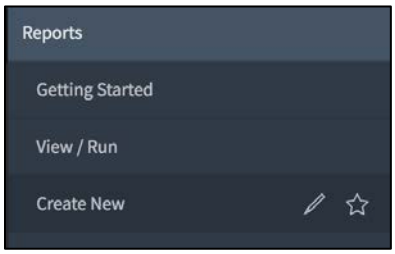


Create Initial Report

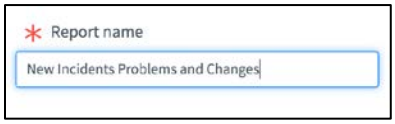
1. Type **Reports** in the Navigation Search Bar.



2. Find and click **Create New** in the Reports application.



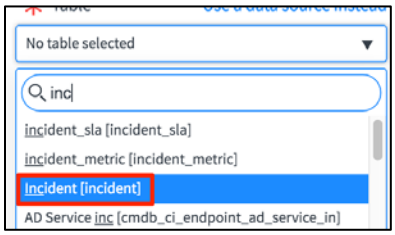
3. Enter **New Incidents Problems and Changes** as the Report name.



4. Click the **Use a table instead** link to allow you to select a Table to report from. The default setting allows you to choose from Report Sources and Performance Analytics Indicator Sources. Both are predefined data sets for creating reports that allow you to reuse sets of filter conditions.



5. Search for and select **Incident**.



6. Click the **Next** button in the lower-left.



7. In the chart type panel **select** Line from the Time series section.

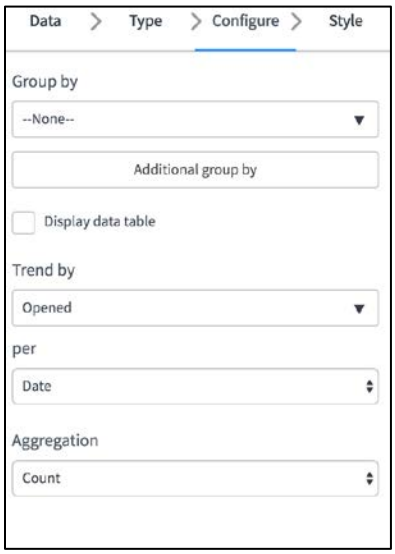


8. Click **Next**.



9. Set the following values in the **Configure** panel:

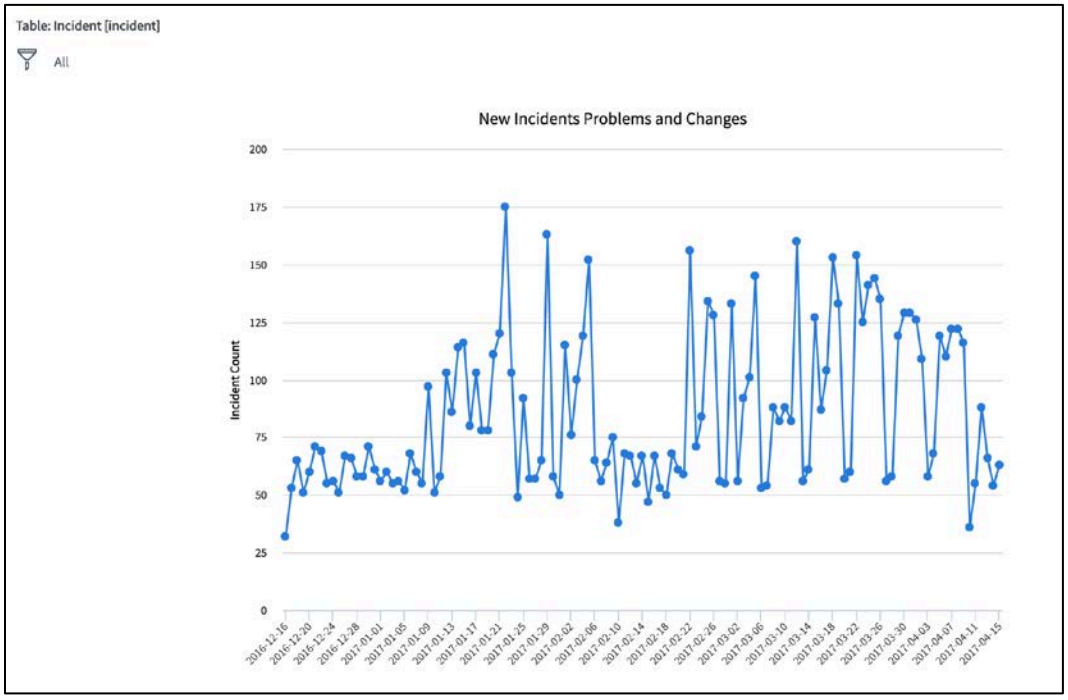
   Group by: **None**
   Trend by: **Opened**
   Per: **Date**
   Aggregation: **Count**



10. Click **Save**.

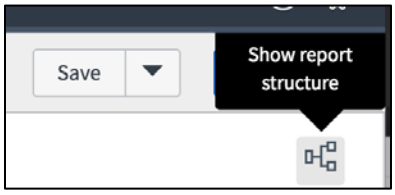
Lab Success Verification

1. Your chart should look like the example.

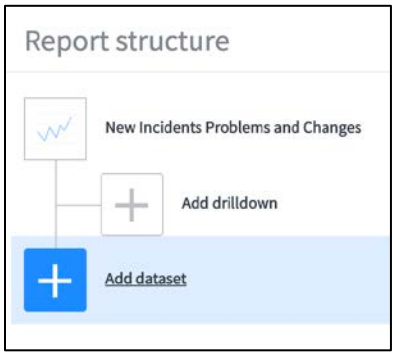


Add Problem Dataset

1. Click the **Show Report Structure** option in the upper-right corner of the report panel.



2. Click the **Add dataset** option.



3. Enter **Problem** as the Dataset name.

4. Click the **Use table instead** link.

5. Select **Problem** from the list of available tables.



6. Click **Next**.

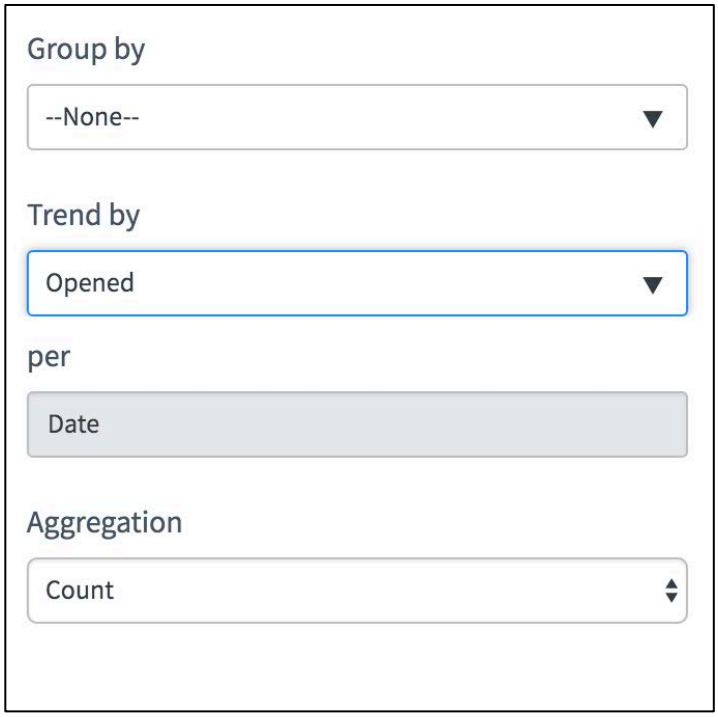
7. Choose **Area** chart from the available chart types. Notice you only have time series charts available to you for the second data set.



8. Click **Next**.

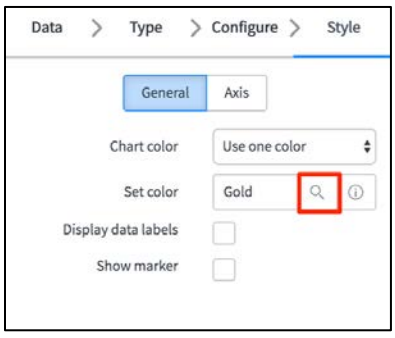
9. Set the following values in the Configure panel:

   Group by: **None**
   Trend by: **Opened**
   Per**: is set to the same value as the main dataset**.
   Aggregation: **Count**

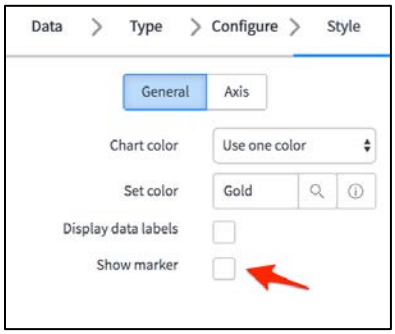


10. Click **Next**.

11. Change the **Set color** value to Gold by clicking on the magnifying glass and searching for **Gold**.



12. Deselect the **Show marker** check box.

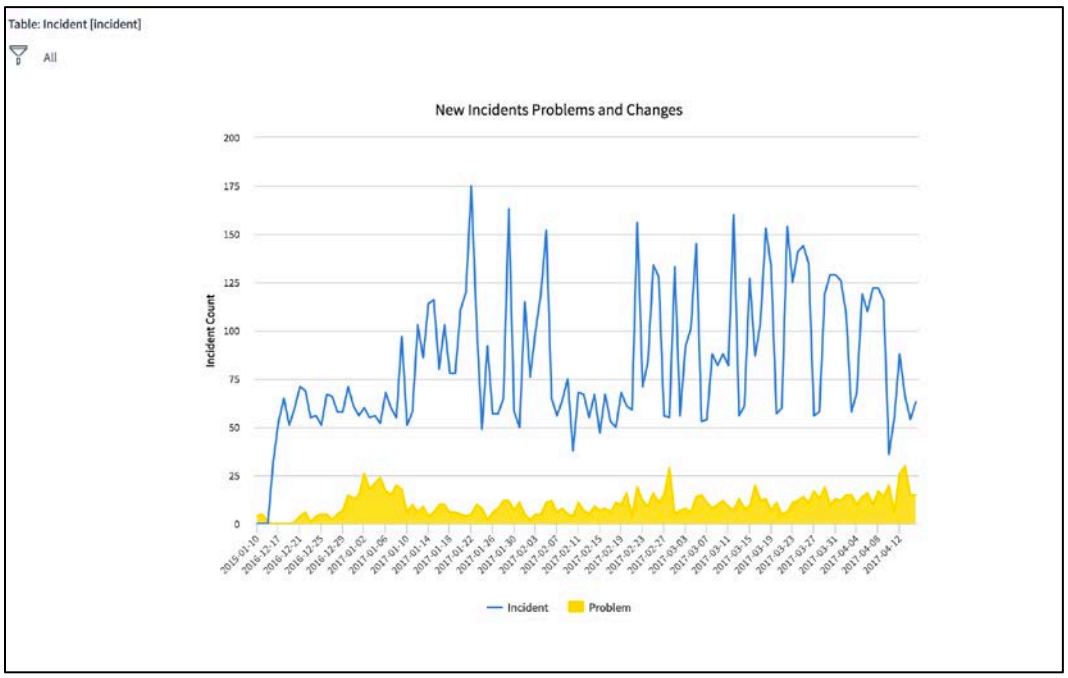


13. Click the **Save** dataset button in the upper-right corner.



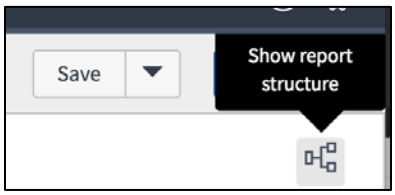
Lab Success Verification

1. Your chart should like the example. You now have data from both the incident and the problem tables on the chart.

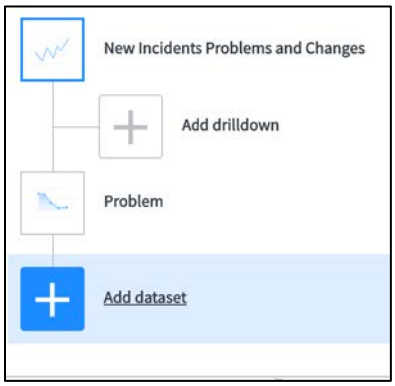


Add Changes Dataset

1. Click the **Show Report Structure** icon in the upper-right corner.

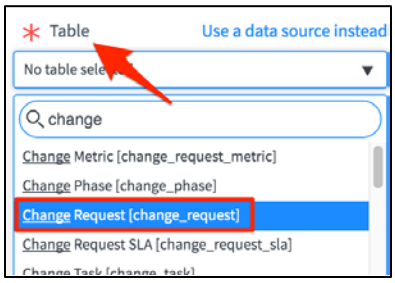


2. Click **Add Dataset**.



3. Enter **Changes** as the Dataset name.

4. Select **Change Request[change_request]** as the table value. If you are not seeing tables, click the **Use a table instead** link.



5. Click **Next**.

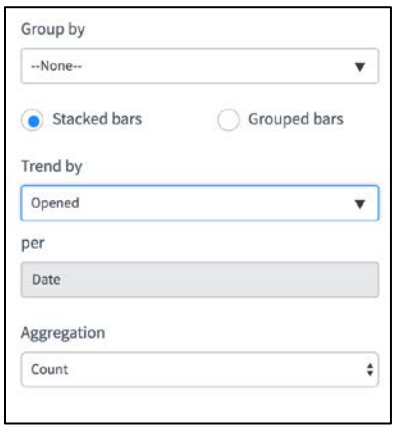
6. Select **Column** from the Time Series chart types.



7. Click **Next**.

8. In the Configure panel select the following values:

   Group by: **None**
   Trend by: **Opened**
   Per: **Date**
   Aggregation: **Count**



9. Click **Next**.

10. Click the **magnifying glass** next to **Set color**. Not the (i).

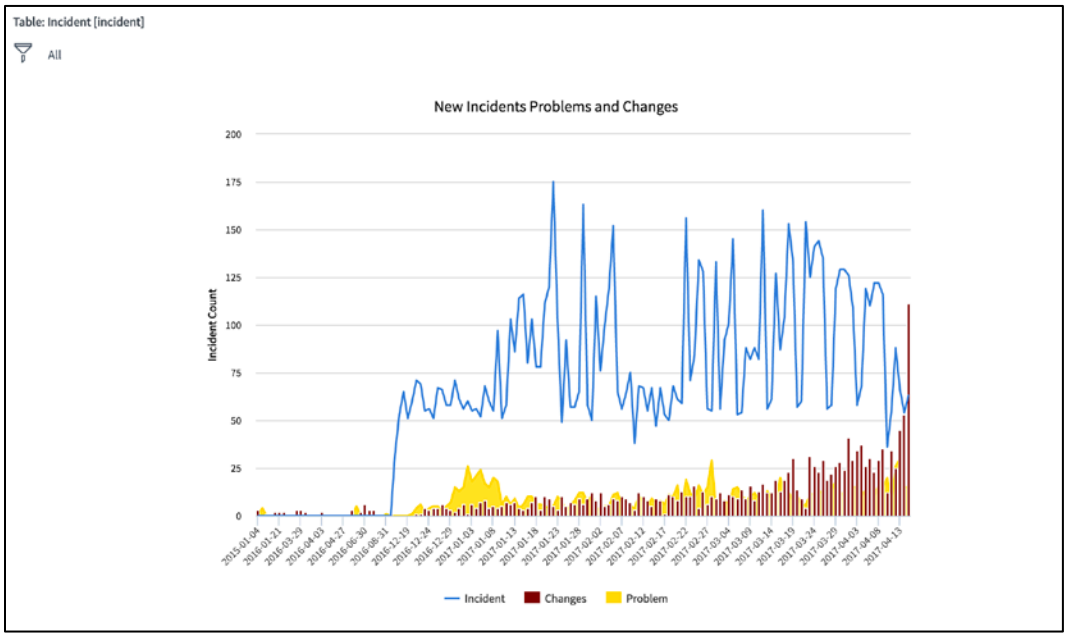
11. Select **Maroon**.

12. Click **Save Dataset**.

13. Click **Save.**

Lab Success Verification

1. Your chart should look like the example. You now have Incidents, Problems, and Changes on the same chart.



Lab Goal

Lab 2.1 Building a Responsive Dashboard

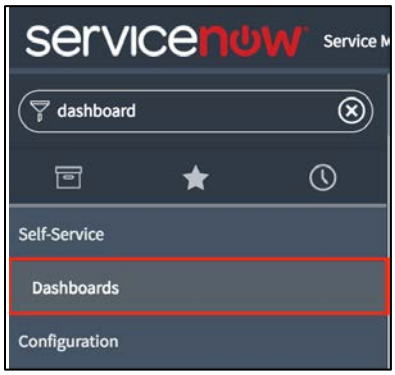
A dashboard is a visual display of the most important information needed to achieve one or more objectives; consolidated and arranged on a single screen so the information can be monitored at a glance. A dashboard typically becomes a gateway to other more detailed information.

This lab explains you how to create a new Responsive Dashboard. Responsive Dashboards improve creation and management of dashboard content.

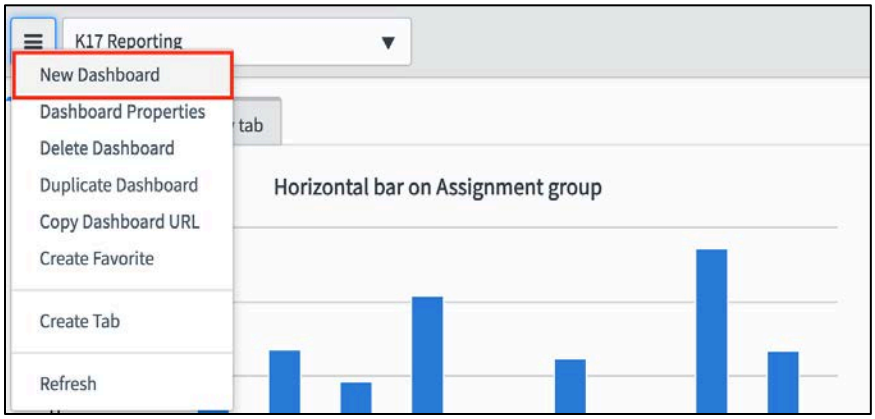
Note: Users with any role can create dashboards with improved sharing capabilities, starting with the Istanbul release.

Create a New Responsive Dashboard

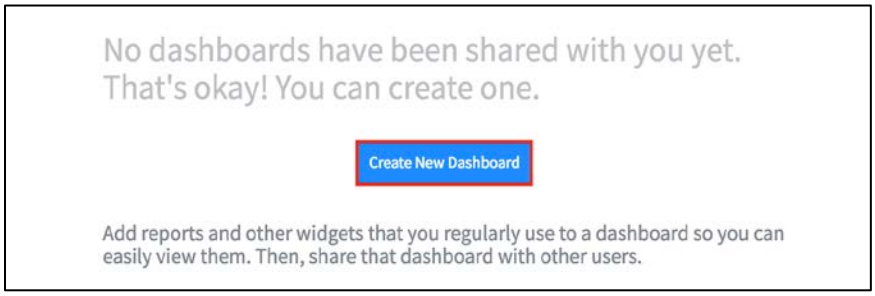
1. Navigate to **Self-Service > Dashboards** from left side menu. If you type **Dashboard** in the **Filter Navigator** box above the menu, it automatically filters to this menu.



2. Click the context menu (☰) and select **New Dashboard**.



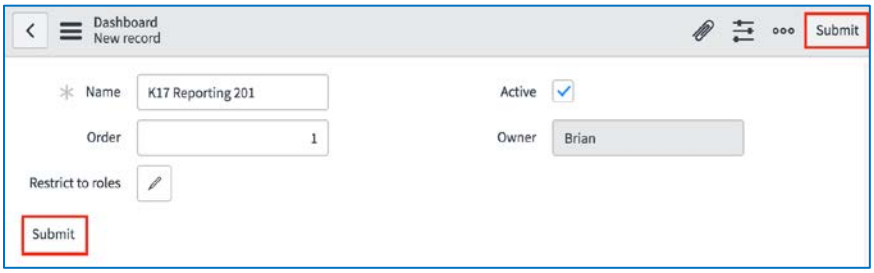
Note: If no dashboards have been shared with you and it is your first dashboard, you will see the screen below. In which case, press **Create New Dashboard** button.



3. Within the Dashboard Properties form, fill in the following fields:

   Name: **K17 Reporting 201**
   Active box: **selected**

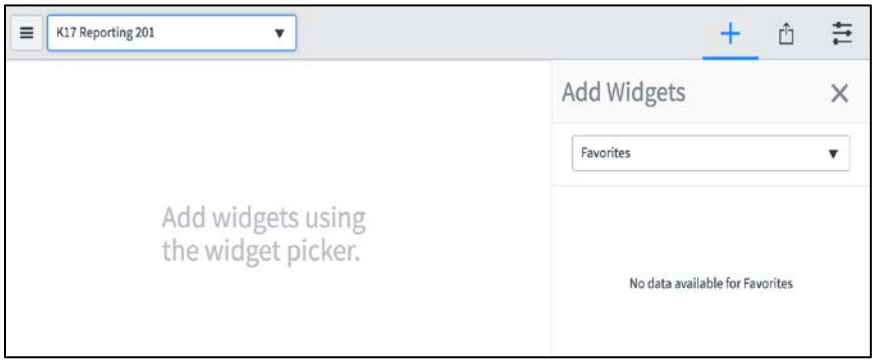
   Note: Inactive dashboards are visible to users with the admin, pa_power_user, and pa_admin roles and only if it is shared with them.
   Order: **1**
   Note: Dashboards with lower order numbers are listed first in the dashboard picker.
   Note: As **t**he **Owner** of the dashboard, you can edit it, and share it with other users. Only a user with the administrator role can change this value.
   Note: When dashboards are migrated from a pre-Istanbul release to Istanbul, the **Restrict to roles** field automatically populates with the **pa_viewer** and **pa_contributor** roles. This provides extra security and ensures that only users who could access the dashboard before migration can access it after migration. Users with any of the specified roles can access the dashboard only when it has been shared with them.



4. **Submit** the new dashboard record.

Lab Success Verification

1. The dashboard should look like the example.



Note: When one of the right panes is open, you are in edit mode.

Lab Goal

Lab 2.2
Add Content to a Responsive Dashboard

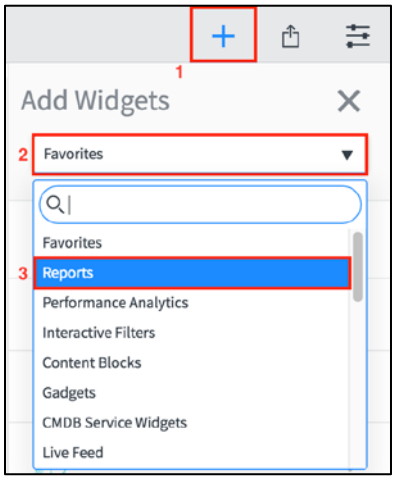
Dashboards enable you to display multiple Performance Analytics, reporting, and other widgets on a single screen in an easy way. Use dashboards to create a story with data that can be shared with multiple users.

This lab focuses on how to:

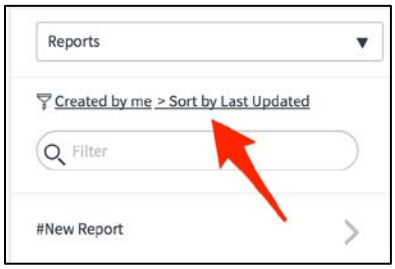
- Use the Add Widget pane to quickly find and preview widgets, then add them to the dashboard.

Add Existing Widgets to the Dashboard

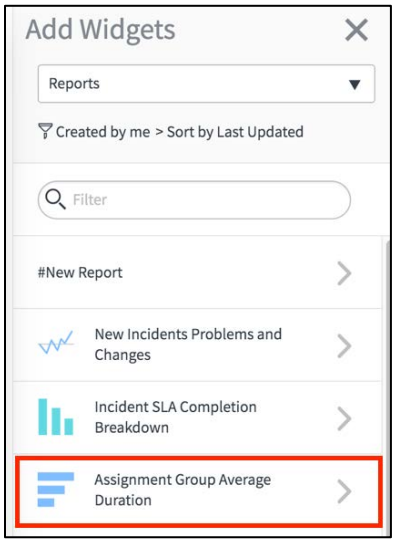
1. To start adding previously created content to the dashboard, select **Reports** from the **Add Widgets** dropdown menu.



Note: By default, reports view displays personal reports and sorts them by Last Updated.

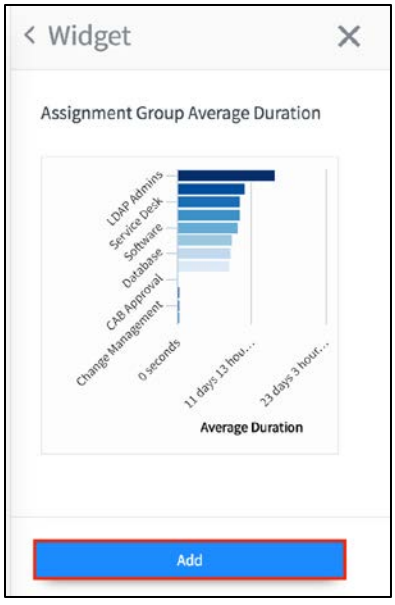


2. Click **Assignment Group Average Duration**.

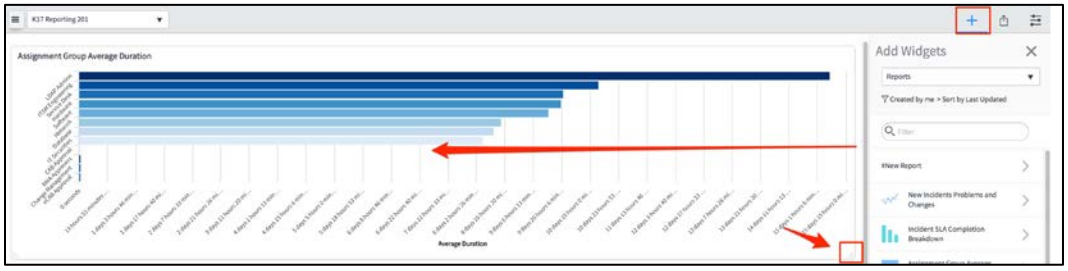


Note: The system displays a preview of the selected report.

3. Click the **Add** button to add the Report to the Dashboard.



4. Notice that the widget is now on the dashboard but as a widget on the full width of the page. With the Edit right side panel open, you can easily resize the widget to fit better.



5. Select one of the corners of the widget, **click & hold the corner** and move / resize your widget so it fits half of its current width.

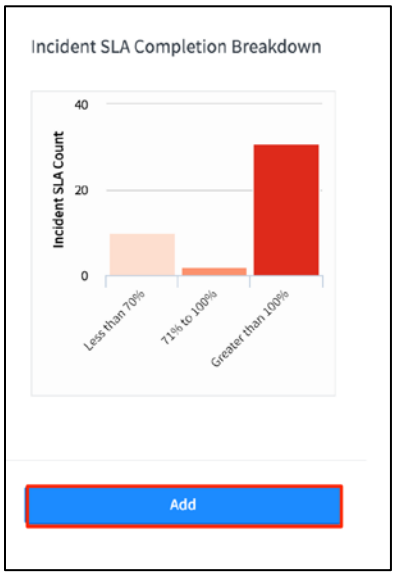
6. Click **Widget** in the panel on the right side of the screen to return to add another report.



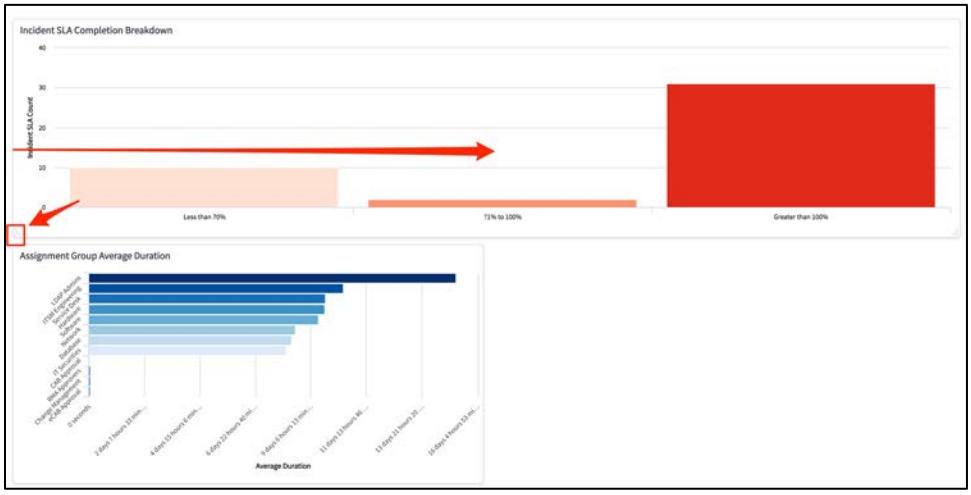
7. Select **Incident SLA Completion Breakdown** from the list of reports.



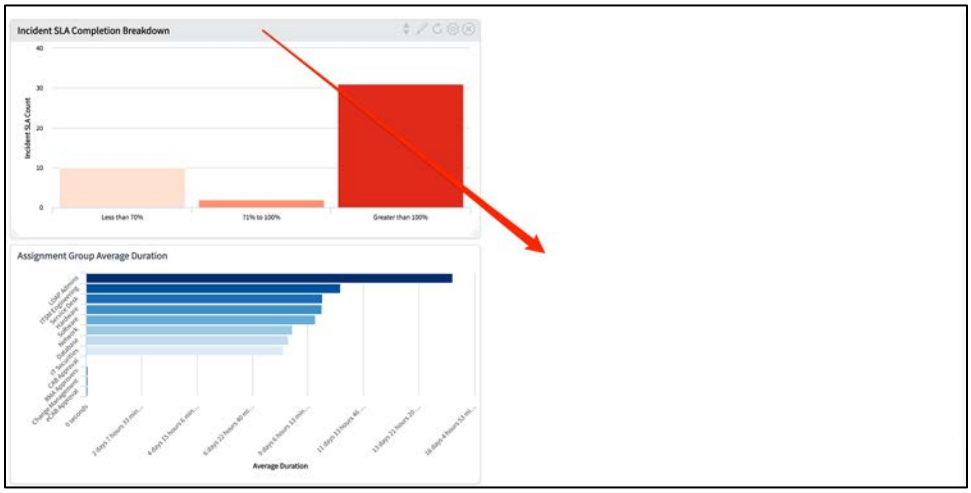
8. Click **Add** to add the report to the dashboard.



9. Select one of the corners of the widget, **click & hold the corner** and move / resize your widget so it fits half of its current width.



10. **Click & hold the widget header** to move it next to Assignment Group Average Duration widget.



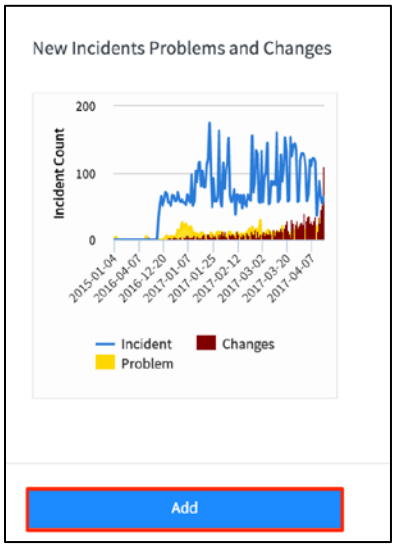
11. Click **Widget** to return to the reports list.



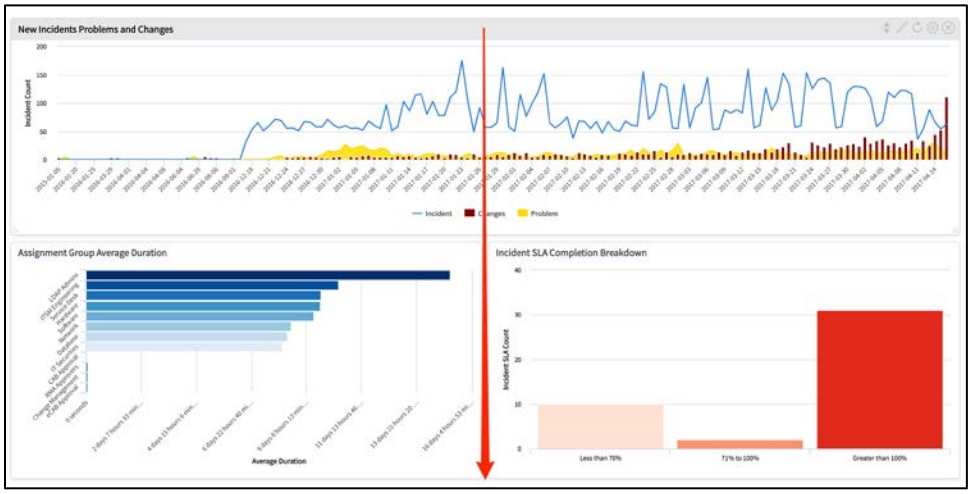
12. Select **New Incidents Problems and Changes** from the Report list.



13. Click the **Add** button to add the report to the dashboard.



14. **Click & hold the header** of the widget to move it below the two previously added widgets.



Lab Success Verification

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



Lab Challenge 1 – Favorite Your Dashboard

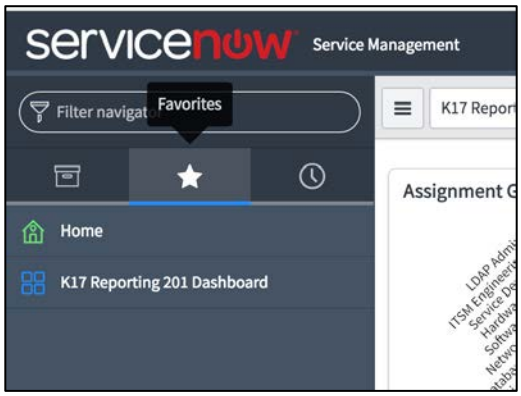
1. Navigate to **Self-Service** > **Dashboards**. If it is not showing the K17 Reporting 201 dashboard by default, you can Search for it using the Dashboard dropdown menu.

2. Click the context menu (☰) and select **Create Favorite**.



Lab Success Verification

1. Click **Favorites** and confirm that your dashboard was added as a link.

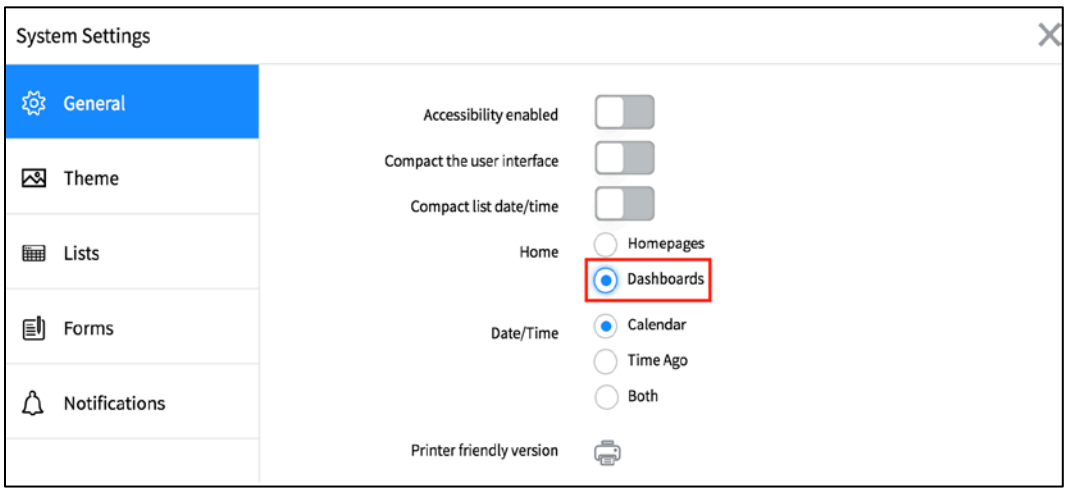


Lab Challenge 2 – Set Dashboards as Your Home

1. Click the gear icon (⚙) to access **System Settings**.



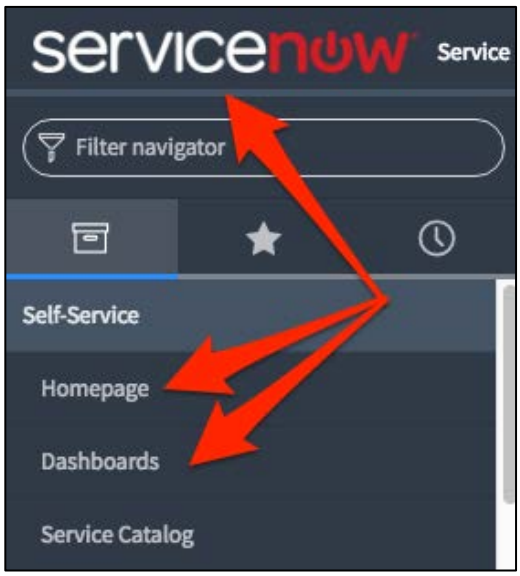
2. On the **General** tab, select **Dashboards** in the **Home** section.



Lab Success Verification

1. Next time you log in or when you navigate to **Self-Service** > **Homepage**, **Self-Service** > **Dashboard**s, or click your company logo, the most recently selected dashboard is always loaded.

   Note: When dashboards are set as your Home, you can no longer navigate to homepages under **Self-Service** > **Homepage** or company logo.



A Note About Responsive Dashboards Enablement

Responsive canvas dashboards are enabled by default on new instances. On upgrading instances, responsive canvas must be enabled by an administrator. If responsive canvas was enabled during Helsinki, it remains enabled after upgrade to Istanbul.

Responsive Dashboards are not enabled by default on upgrading instances. However, an admin can choose to enable responsive dashboards so that *all users* on your instance can create, edit, and share dashboards. When you enable responsive dashboards, all existing dashboards are converted to responsive dashboards.

During upgrade, the Responsive Dashboards plugin is active by default on all instances. The system property **glide.cms.enable.responsive_grid_layout** determines whether responsive dashboards are enabled or disabled.

If responsive canvas was enabled during Helsinki, after upgrade all dashboards are responsive, including dashboards that were not responsive during Helsinki.

A Note About Differences Between Responsive and Nonresponsive Dashboards

Responsive dashboards can be created and shared by any user with any role. You can drag to move and resize widgets on responsive dashboards. Nonresponsive dashboards use less flexible drop zone layouts, and require Performance Analytics roles to view, create, and edit.

Look at the dashboard header to determine whether a dashboard is responsive or not.

1. Responsive dashboards:



2. Nonresponsive dashboards:



Lab Goal

Lab 2.3 Related List Condition Builder

This lab introduces you to 2 capabilities. The first is the ability to add new reports/widgets directly from the dashboard canvas; the second is the Related List Condition Builder capability that was introduced in Istanbul.

Related list conditions allow you to include a relationship with another table in the filter. Related list conditions are supported only in List v3.

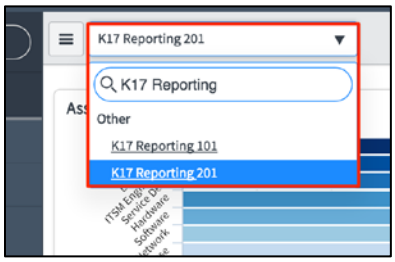
You can optionally include conditions on the related table. For example, you can filter active problems with one or more related incidents that are in the Canceled state. Another example is to filter incidents with a breached service level agreement (SLA).

For this example, you create a report that shows **Critical** and **High** priority incidents that have SLA tasks with less than 1 day's worth of business time left before they breach.

Note: You can include only one related table in the query, however, you can add multiple conditions for that table.

Create a New Report from the Dashboard

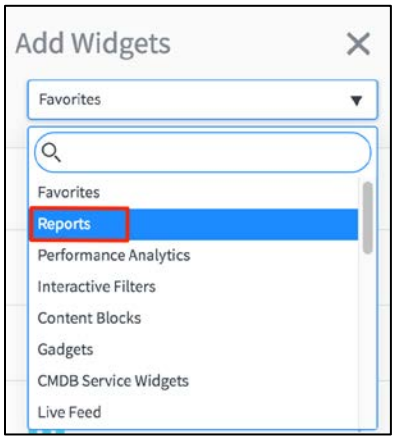
1. Navigate to Self-Service > Dashboards. If it is not showing the K17 Reporting 201 dashboard by default, you can Search for it using the Dashboard dropdown menu.



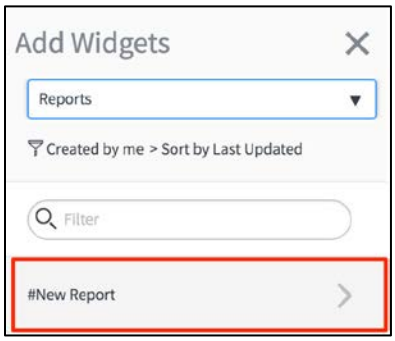
2. Click the (**+**) in the upper corner of the dashboard to expand the Add Widgets panel.



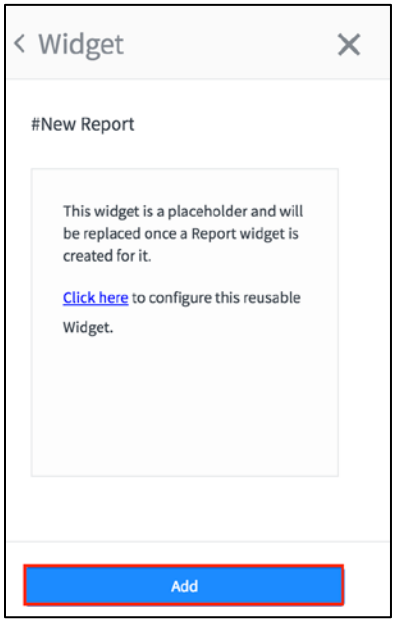
3. Select **Reports** in the Add Widgets dropdown list.



4. Select **#New Report** from the list of available reports.



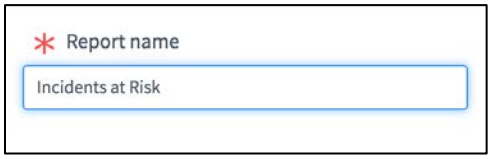
5. The system shows a preview; click **Add** to add the placeholder for the New Report to the dashboard.



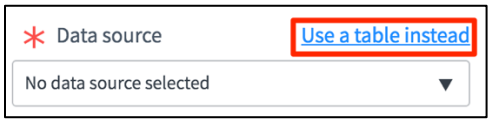
6. In the **#New Report** widget that has now been added to the dashboard, click the blue Click here link to launch the Report Designer.



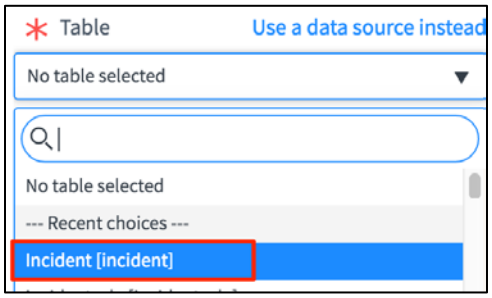
7. In the **Report name** text box, enter **Incidents at Risk**.



8. Click the **Use a table instead** link to switch the list of available data sources from Report sources to tables.



9. From the list of available Tables select **Incident [incident]**.



10. Click the **Next** button.



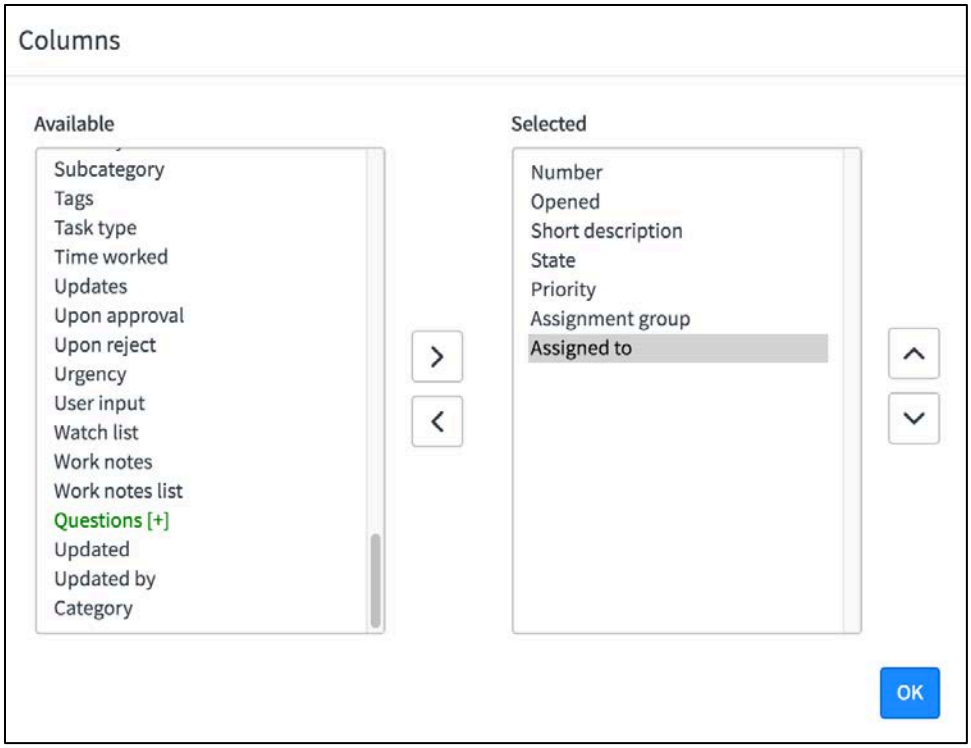
11. Leave this as a list-based report, skip the Type section and move directly to Configure. Click **Configure**.



12. Click the **Choose columns** button.

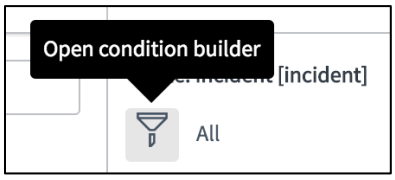


13. In the Columns dialogue window, select the following fields for the report by moving or removing them from the left column. The fields to include are **Number**, **Opened**, **Short description**, **State**, **Priority**, **Assignment group**, and **Assigned to**. The window should look like the example.



14. Click **Ok**.

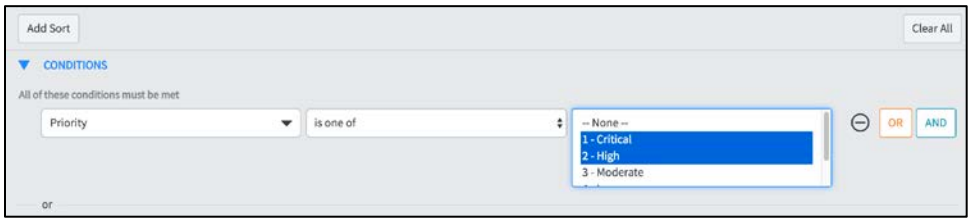
15. Click the **Filter** icon to open the Condition Builder.



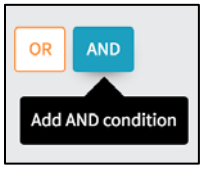
16. First, filter the incident table to show only **Critical** and **High** priority incidents. To do that set the following values:

    Field: **Priority**
    Operator: **is one of**
    Values: **1 – Critical, 2 – High**

    Note: You can select multiple values by holding the Command button on selection.

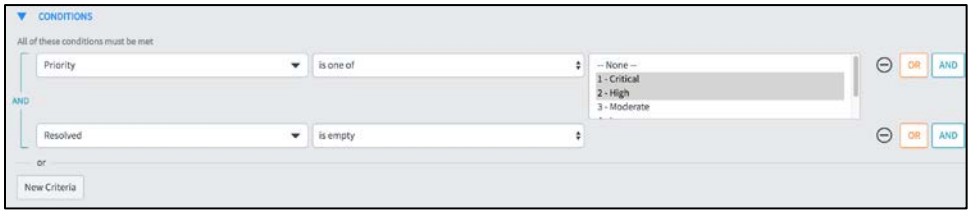


17. Click the **AND** button to add an additional condition. Focus on incidents that are still open. To do this, add a condition that evaluates whether the resolved field is empty or not.



18. In the **Condition Builder** enter the following values:

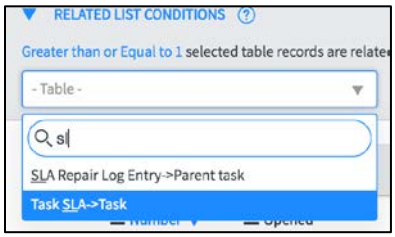
    Field: **Resolved**
    Operator: **is empty**



19. Now, add a condition on the Task SLA table to filter out only the incidents that have associated tasks with less than a day of business time remaining before breaching. This could be accomplished using a database view, similar to what you did earlier, but in some cases you are not going to have an existing database view in place and you may not have the role or access to create one. Using the Related List Condition Builder allows you to create the report you want without a database view. Click the blue **arrow** to the left of the Related List Conditions text in the Condition Builder.

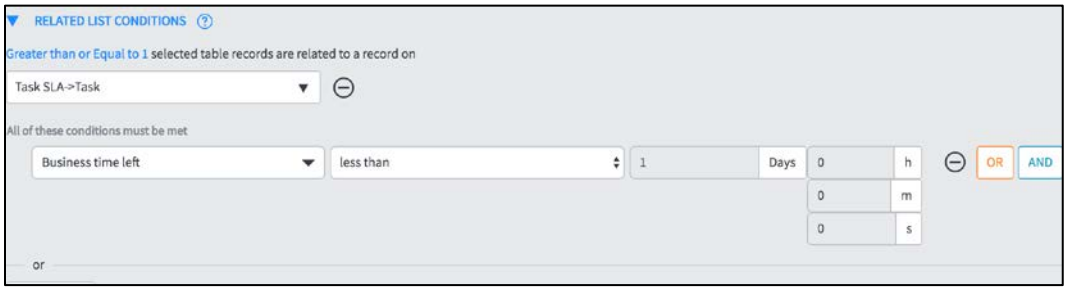


20. In the **Table** dropdown list find and select **Task SLA** -> **Task**.



21. In the **Condition Builder** enter the following values:

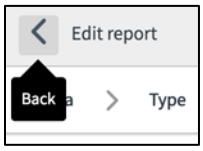
    Field: **Business time left**
    Operator: **less than**
    Days: **1**



22. Click **Run**. This should leave 3 Incidents that match those conditions.

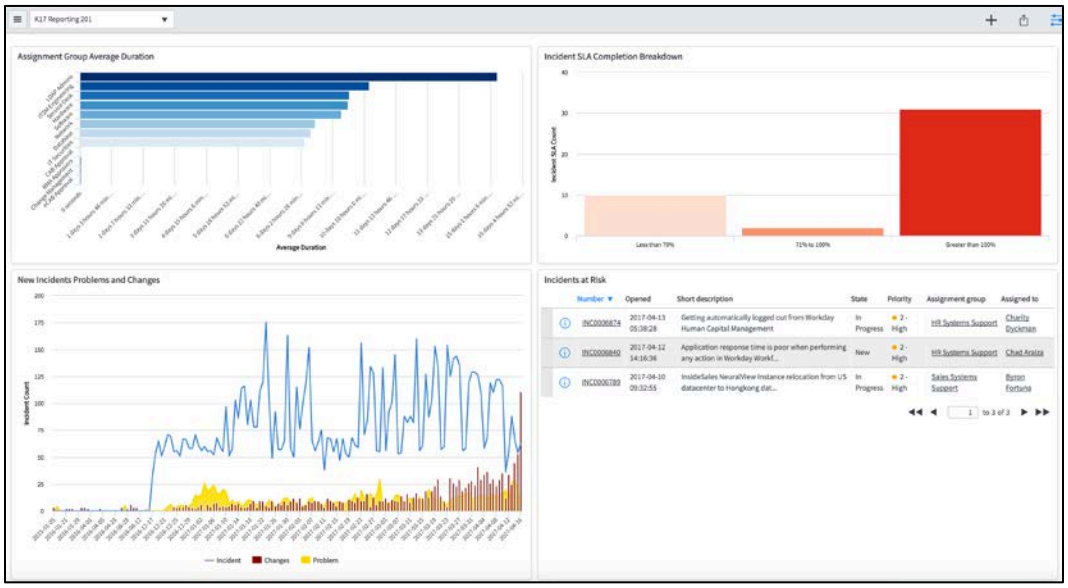


23. Click the **Save** button to return to the dashboard. If it does not return you, click the left **arrow** next to the Edit Report text in the upper-left corner of the screen.



Lab Success Verification

1. After you are back in the dashboard, use what you learned to rearrange the widgets on your dashboard to look like the example.



Lab Goal

Lab 3.1
Add Interactivity to Your Data

To maximize the value of any dashboard that you deploy, you need to ensure that it is adopted and used by the target audience. One of the ways to maintain and increase user adoption is to add interactivity to the content in a dashboard that allows users to ask follow-up questions of the information being presented to them.

This lab explores 3 different ways to add interactivity to content within a dashboard:

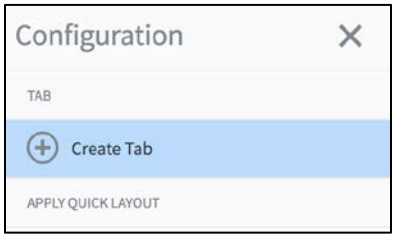
- Alternative Group By and Stacked By choices for a chart
- Additional Drilldowns
- Interactive Filters

Create a New Dashboard Tab

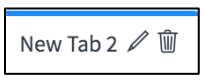
1. From the K17 Reporting 201 Dashboard, click the **Configuration** button in the upper-right corner.



2. In the Configuration Panel, click **Create Tab**.



3. A new tab is created. Click the **pencil** in the **New Tab 2** tab to edit the tab name.



4. Set the tab name to **Interactivity**.
5. Click the **pencil** in the first tab to edit the tab name.
6. Set the tab name to **Overview**.

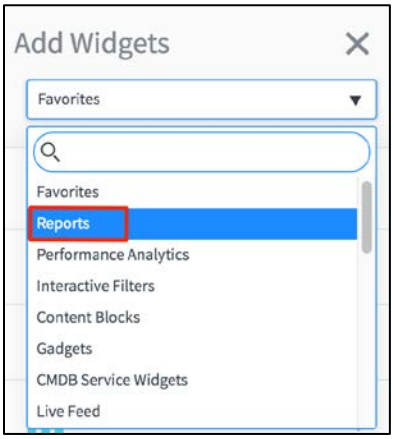
Lab Success Verification

1. Your dashboard should look like the example.

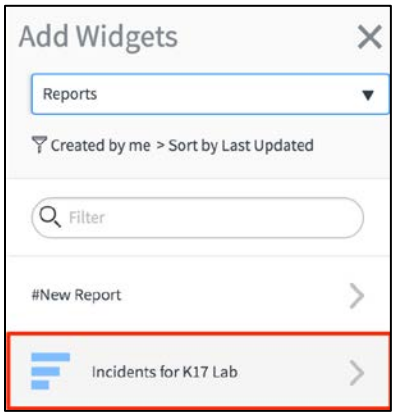


Add an Existing Report to the Dashboard

1. The Add Widgets panel on the right side of the screen should have been activated. If not, click the (**+**) to activate the panel. **Select** Reports from the Add Widgets dropdown list.



2. In the Reports list, locate the **Incidents for K17 Lab** and click it.

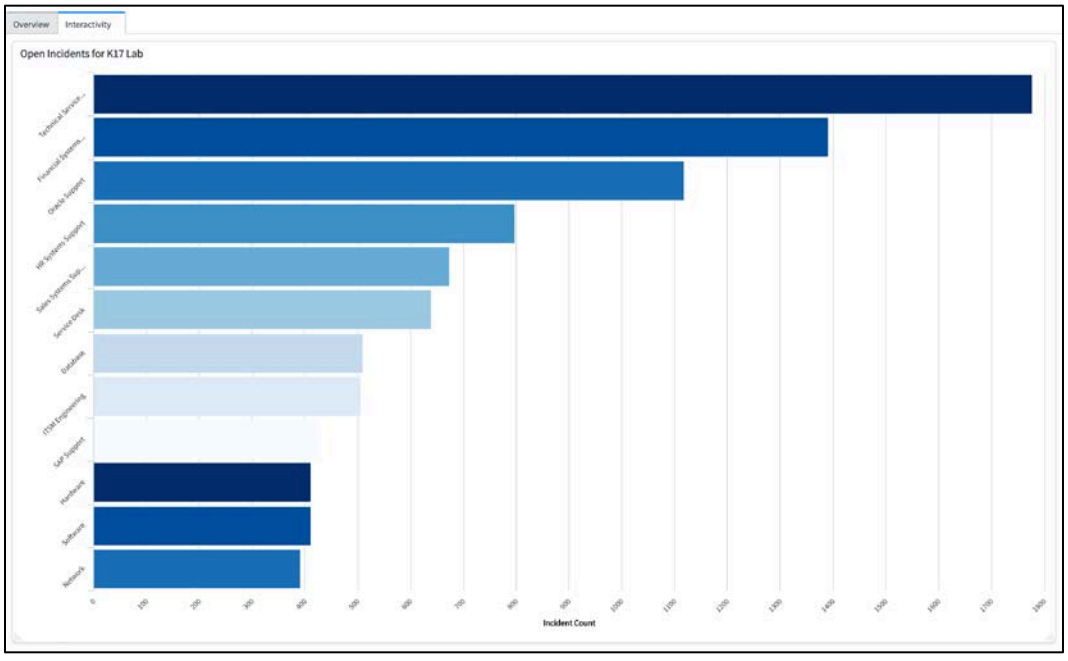


3. Click the **Add** button to add the widget to the dashboard.

4. Once the widget is added to the dashboard, grab the lower-right corner of the widget and **resize the widget** to fill the available real estate on canvas.

Lab Success Verification

1. Your screen should look like the example.

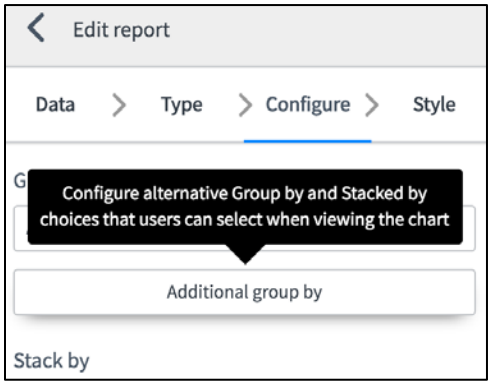


Add Additional Group by and Stacked by to the Report

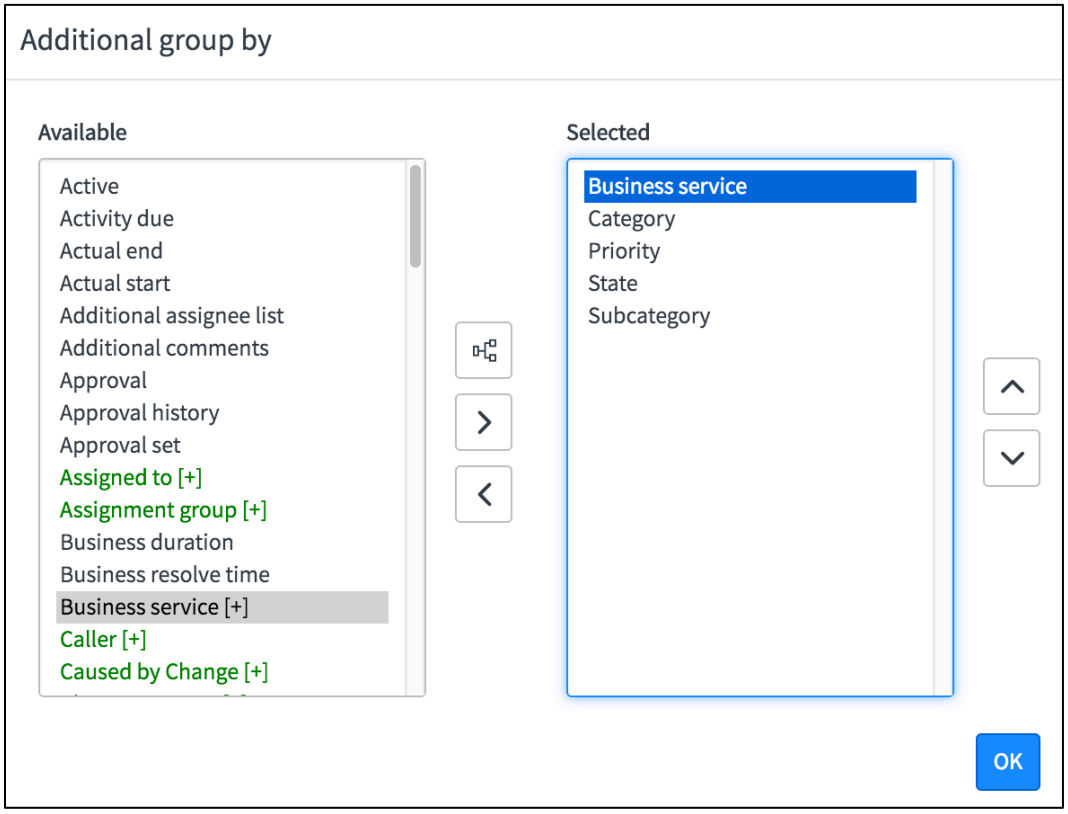
1. Now edit this report to add more **Group By** and **Stack By** options. Click the **pencil** in the upper-right corner of the widget.



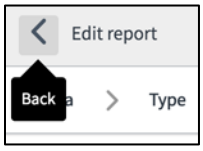
2. Move to the Report Designer, placed on the Configure panel. From here, click the **Additional group by** button.



3. In the Additional group by dialogue window, select the following fields: **Business Service**, **Category**, **Priority**, **State**, and **Subcategory**. Click **OK**.



4. Click the **Save** button. This should return you to the dashboard. If it does not, click the left **arrow** next to the Edit Report text in the upper-left corner of the screen.



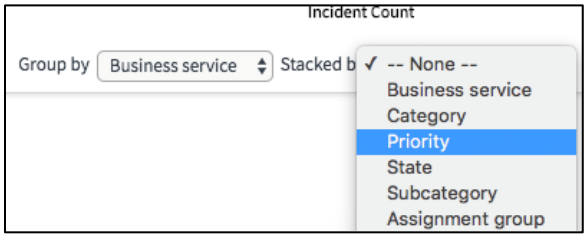
Note: After returning to the dashboard, notice at the bottom of the Open Incidents for K17 bar chart that there are 2 new dropdown lists for the user. These allow the users to select different Group By and Stacked by values without having to open the Report Designer, essentially allowing this one chart to become many.



5. Change the **Group by** value from Assignment Group to **Business Service**.

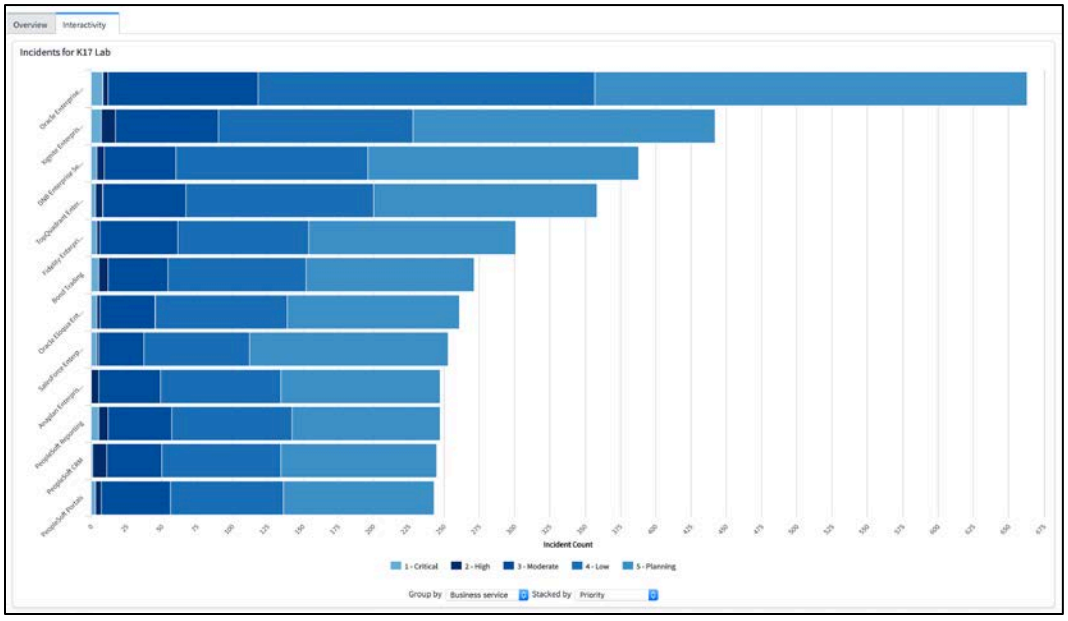


6. Change the **Stacked By** from None to **Priority**.



Lab Success Verification

1. Your chart should look like the example.



Add a Drilldown to the Report

1. Click the pencil in the upper-right corner of the report to open the Report Designer.



2. Click the **Show Report Structure** icon in the upper-right corner of the Report Designer.

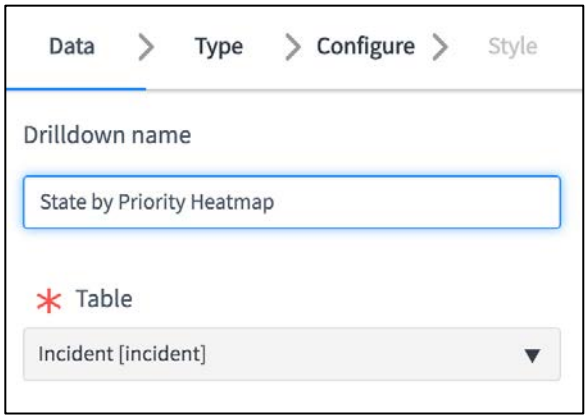


3. Click the **Add Drilldown** option.



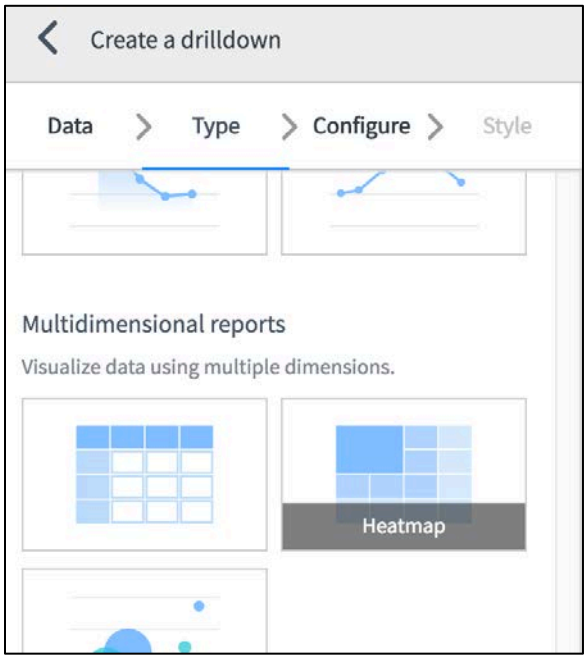
4. Enter **State by Priority Heatmap** as the Drilldown name.

   Note: Table value has already been set, but you need to enter a Drilldown name for this report because potentially you can have more than one drilldown available within a single report.



5. Click **Next**.

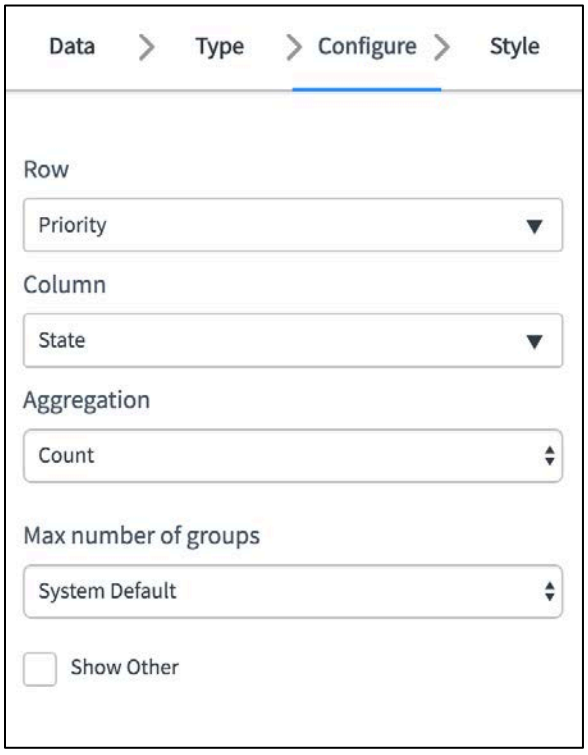
6. Choose the **Heatmap** from the list of available visualizations.



7. Click **Next**.

8. In the **Configure** panel of the Report Designer set the following values:

   Row: **Priority**
   Column: **State**
   Deselect the **Show Other** check box.

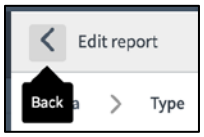


9. Click **Save drilldown** in the upper-right corner of the Report Designer.



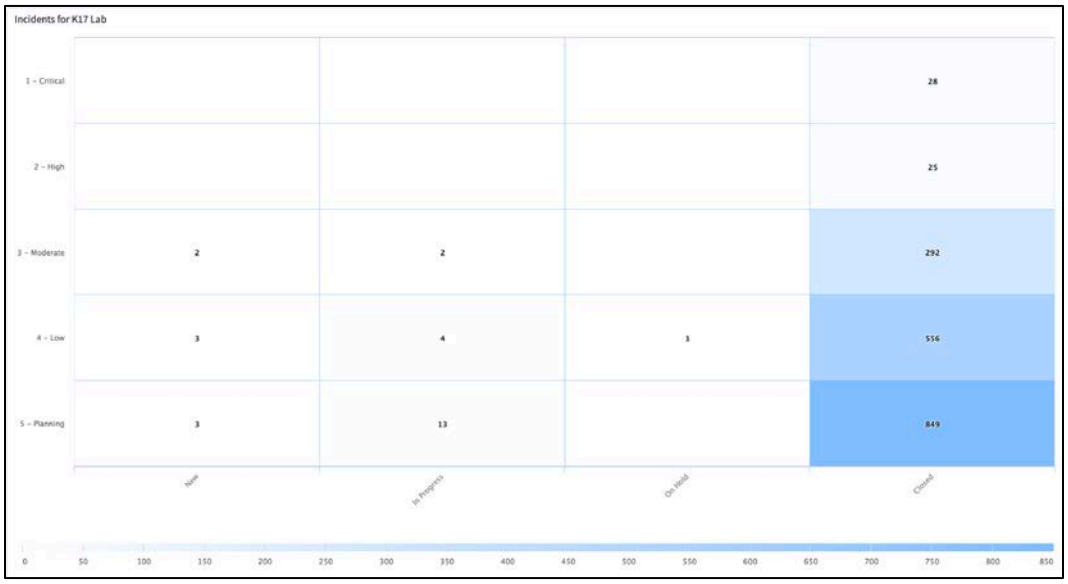
10. Click the **Save** button in the Report Designer.

11. Click the **Back** arrow to the left of the Edit Report text in the upper-left corner of the screen to return to the dashboard.



Lab Success Verification

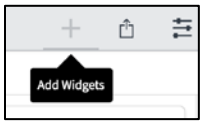
1. Once back in the dashboard, click the first column in the chart (should be Technical Service) to drill down into the new Heatmap.



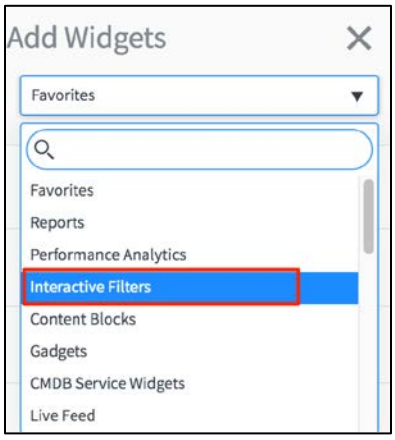
Add Interactive Filters

To further improve the flexibility for the end user, add what are known as Interactive Filters to give the user the ability to narrow down the information on the dashboard by different criteria. Interactive Filters are a type of Widget.

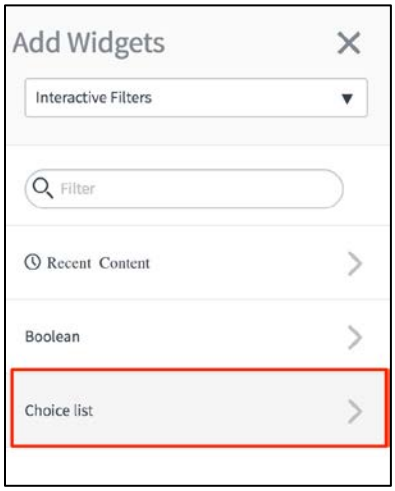
1. Click the **Add Widget** icon in the upper-right corner of the dashboard.



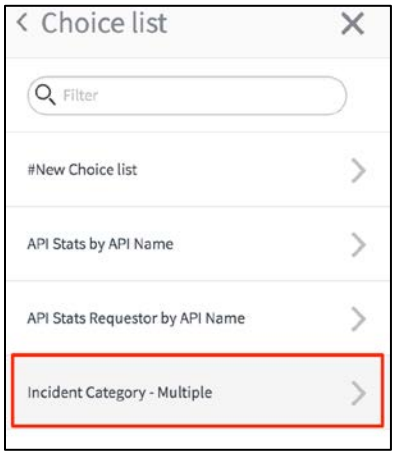
2. From the Add Widgets panel, select **Interactive Filters** in the dropdown list.



3. Choose **Choice List** from the available options.

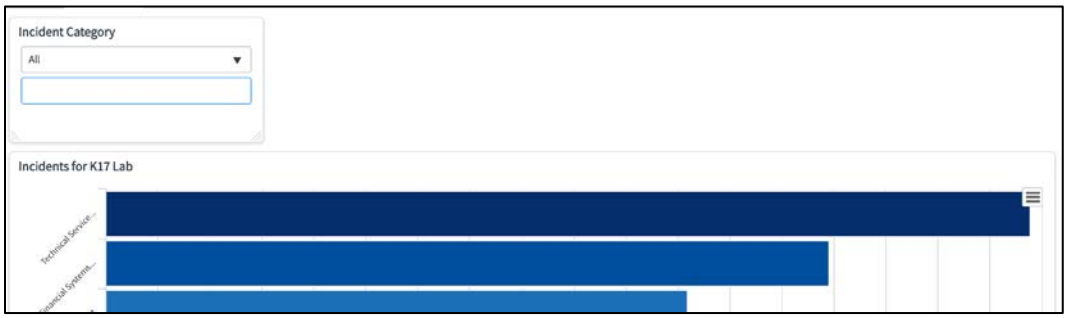


4. Select **Incident Category – Multiple** from the Choice list options.



5. Click the **Add** button to add the widget to the dashboard.

6. After the widget is added to the dashboard, click the lower-right corner of the widget to resize it appropriately for the screen.

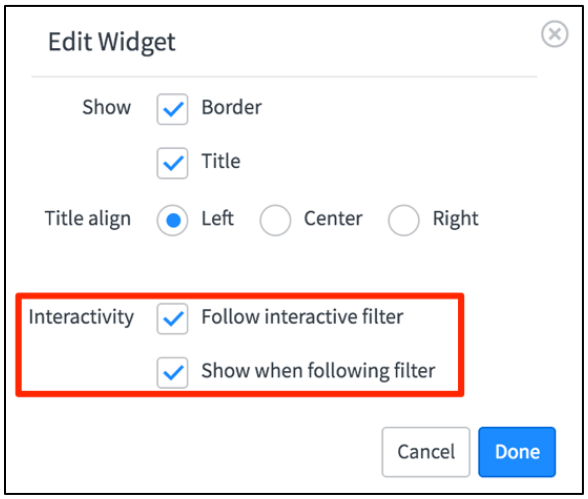


7. To have the report/chart respect the interactive filter, you need to tell it to follow the interactive filter. To do this, click the gear in the upper-right corner of the Incidents for K17 Lab widget. This is only available if you are in edit mode.



8. In the Edit Widget dialog, check the **Follow Interactive Filter** check box.

9. After that is checked, an additional check box appears, **Show when following interactive filter** Check that box. This places a filter icon in the widget if it is being impacted by an interactive filter.



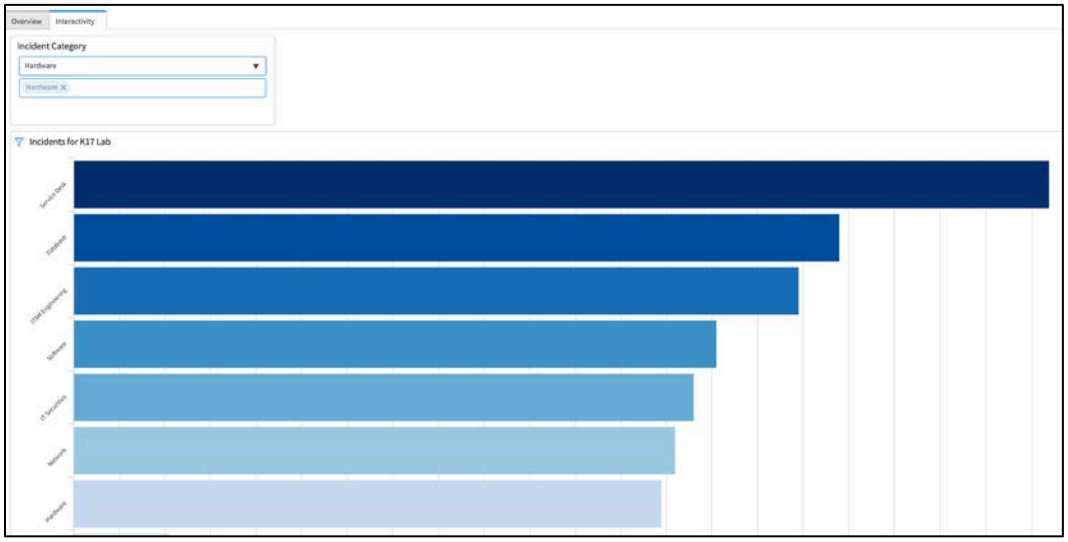
10. Click **Done**.

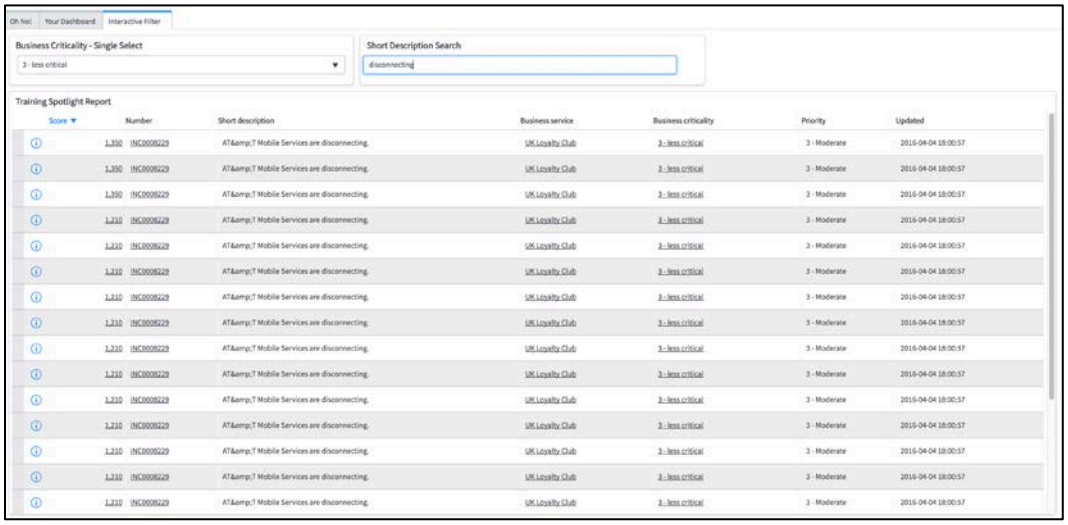
11. After you return to the dashboard screen, select **Hardware** from the **Incident Category** dropdown list. Notice the chart update.



Lab Success Verification

1. Your chart should look like the example.





Lab Goal

Lab 4.1 Share a Dashboard

Share a dashboard with other users to create a shared view of data that you can use to collaborate. You can give other users viewing rights or editing rights.

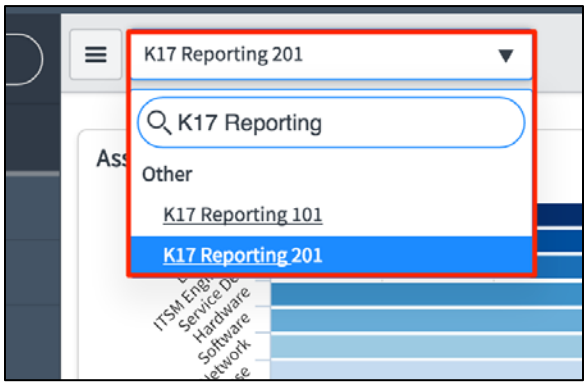
Note: Dashboards remain private until shared.

Note: Sharing a dashboard does not grant permissions to most widgets on that dashboard.

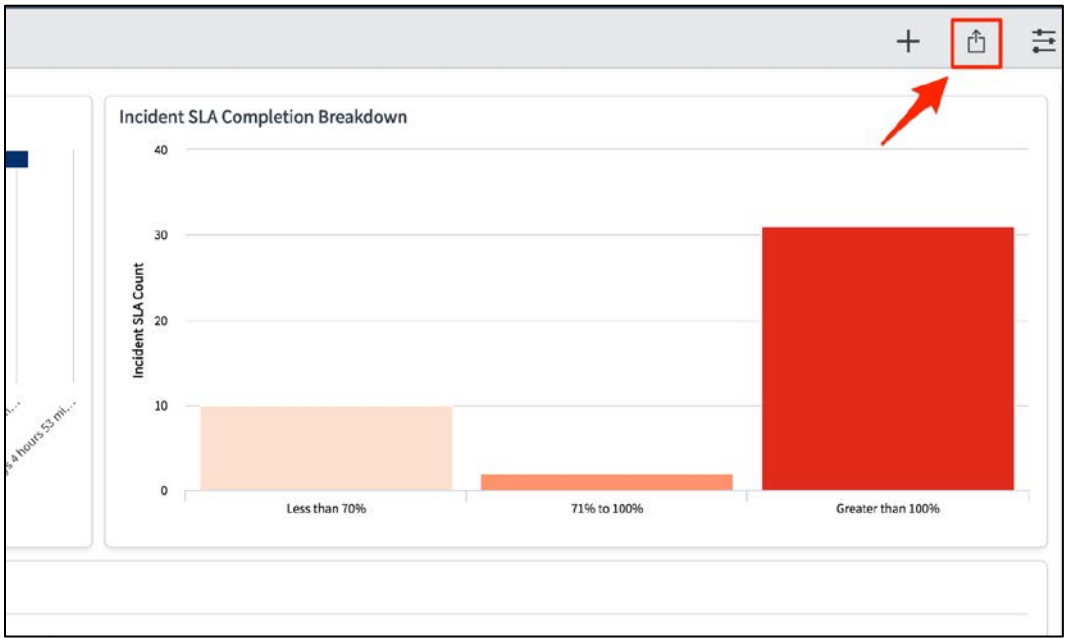
Manage Dashboard Permissions

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

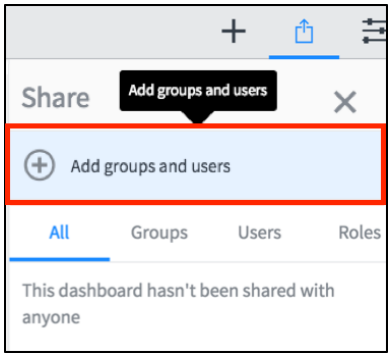
2. If it is not showing the K17 Reporting 201 dashboard by default, you can Search for it using the Dashboard dropdown menu.



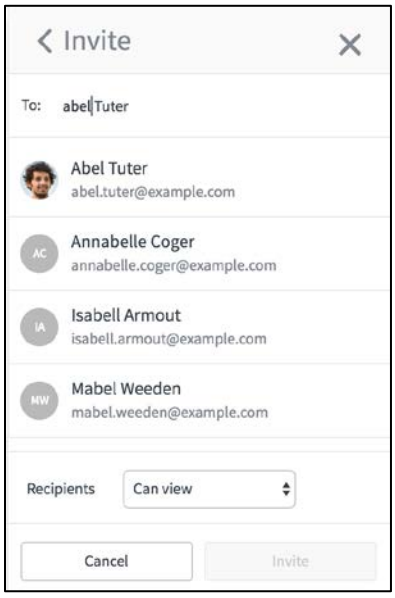
3. Click **Sharing** ( ) to open sharing panel.



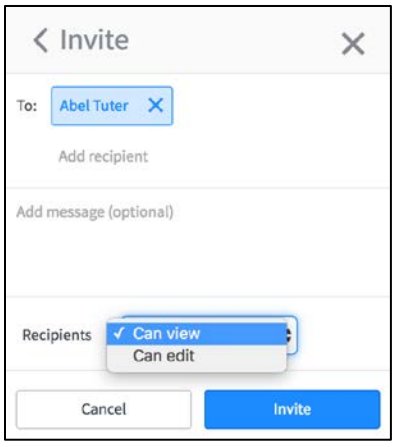
4. Click **Add Users and Groups** ( ).



5. Add **Abel Tuter** in the search box below and **Select** him.



Note: You can set granular permissions for viewing or editing the dashboard, and can optionally add an Invite message.



6. Finally, click **Invite** to share the dashboard.



Note: An email notification is sent out to the invited user.

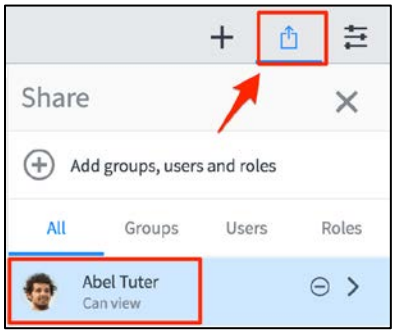
Lab Success Verification

1. A system notification is displayed that the user was successfully invited.



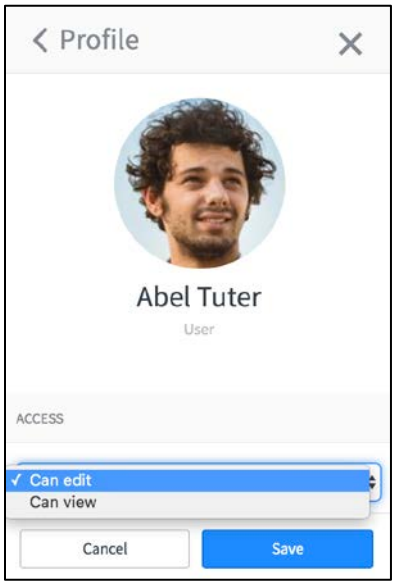
Lab Challenge 1 – Modify Existing Permissions

1. Make sure Sharing panel is open and click **Abel Tuter** to open Profile View.

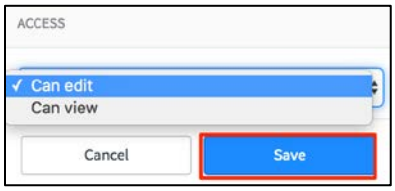


Note: You can remove the user access by clicking the (—) icon.

2. From Profile View, modify user access from Can View to **Can Edit**.



3. Click **Save**.



Lab Success Verification

1. The Sharing View looks like the example.

