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LAB: REPORTING 101

A Walkthrough Lab for Creating and Understanding the Fundamentals of Reporting in ServiceNow

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Updated by	Seth Humphrey

SERVICENOW TABLES

ServiceNow data management is constructed on numerous extensible database tables. Reports are derived from visualizing data from typically a single, specific table. Understanding which table you need to access is key.
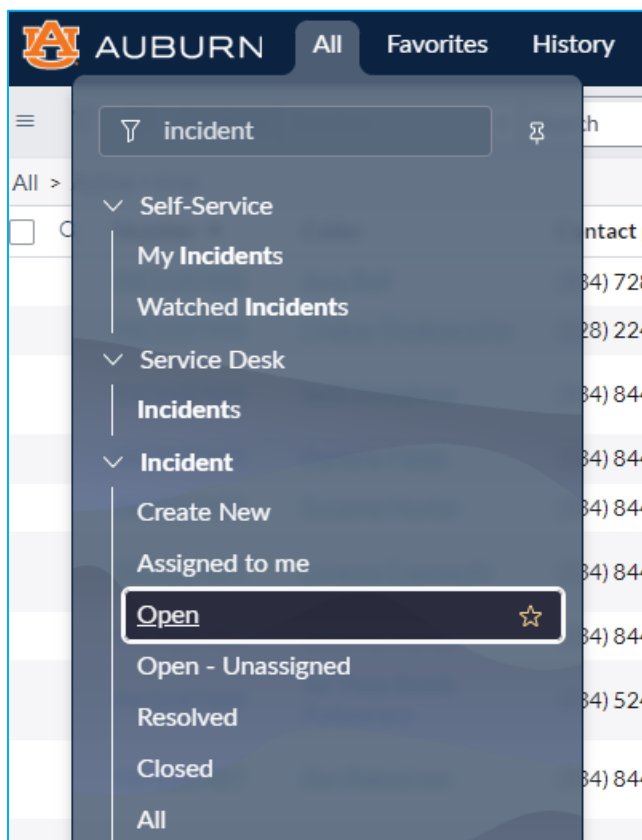
TUTORIAL

Let's view active incidents.

1. Log into the ServiceNow platform at https://auburn.service-now.com.

   Note: If you get redirected to the IT Homepage, you do not have a role needed to access the platform. Contact the ServiceNow team for support.

2. In the top navigation bar, click **All** to bring up the application navigator, filter for **incident**, and select **Open**.

3. View the URL in your browser and find the word(s) directly prior to "_list.do".

auburn.service-now.com/now/nav/ui/classic/params/target/incident_list.do%3Fsyspar

In this example, incident is the name of the table of Incident records. All the extra characters after the table display call are user preference settings and the active filter(s).

## FREQUENTLY USED TABLES/VIEWS

- Asset [alm_asset]
    - Hardware [alm_hardware]
- Configuration Item [cmdb_ci]
    - Hardware [cmdb_ci_hardware]
        - Computer [cmdb_ci_computer]
        - Server [cmdb_ci_server]
    - Service [cmdb_ci_service]
- Task [task]
    - Change Request [change_request]
        - Change Task [change_task]
    - Incident [incident]
    - Request [sc_request]
        - Requested Item [sc_req_item]
            - Catalog Task [sc_task]
- Incident Metric [incident_metric]
- Interaction [interaction]
- Knowledge [kb_knowledge]
- Knowledge Use [kb_use]
- User [sys_user]
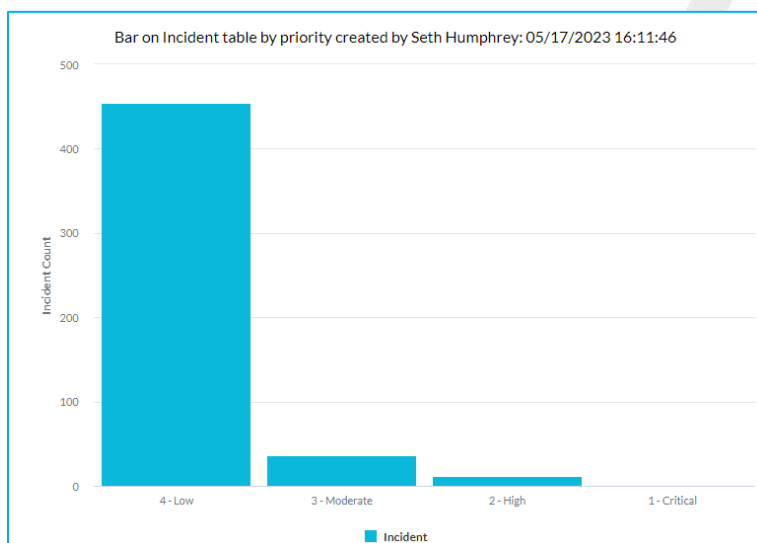- Group Member [sys_user_grmember]

QUICK REPORTS

LISTS TO BAR/PIE CHARTS

1. With the Incident table still loaded in your browser, hover your mouse over a column header for Priority and click the vertical ellipse menu icon.
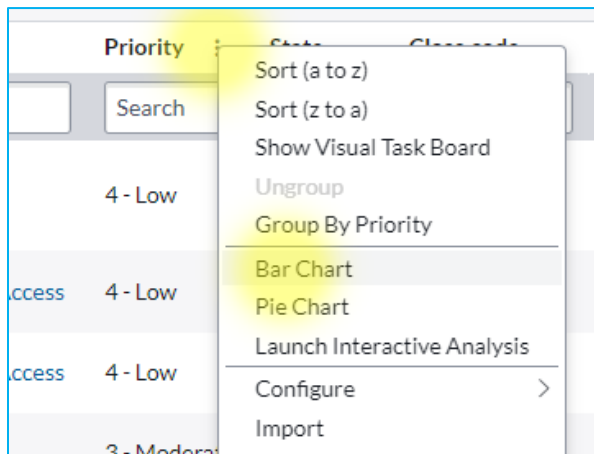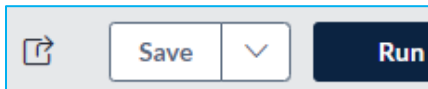

2. Click Bar Chart.

   A bar chart of incidents based on priority should be displayed within the Report Designer.

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Note: This report has not been saved until the **Save** button at the top-right corner is pressed.

USE PREDEFINED REPORTS

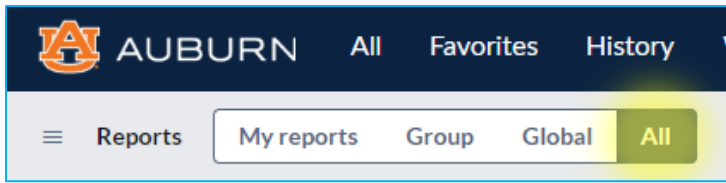ServiceNow provides over 900 reports out of the box. These reports are sufficient in many cases.

1. Log into the ServiceNow platform at https://auburn.service-now.com.

2. In the top navigation bar, click **All** to bring up the application navigator, filter for **reports**, and select **View / Run**.
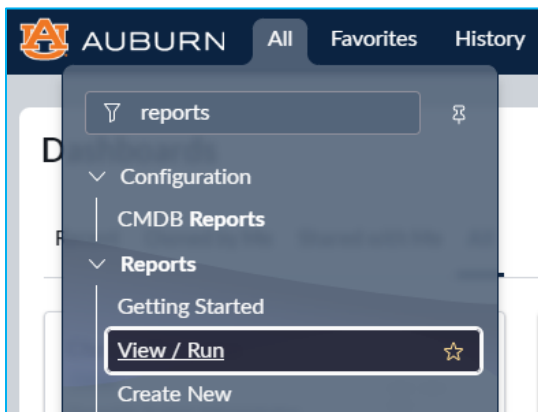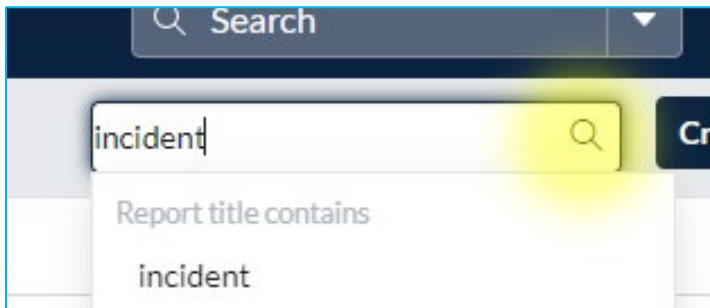
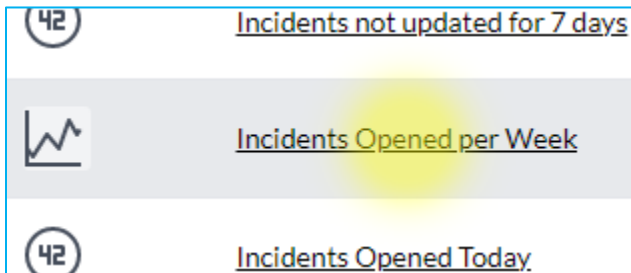3. On the Reports landing page, select the **All** reports tab.

Take a moment to peruse the available reports.

4. Use the reports search to narrow reports to "title" that contain **incident**.
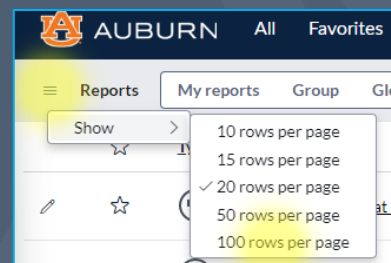

5. Locate and click the **Incidents Closed per Week** report.


PRO TIP

By default, only 20 rows (records/results) are displayed per page. Use the top-left hamburger menu to decrease/increase to a more useful section.

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6. On the **Configure** pane, change the "per" data from **Week** to **Month**, and press the **Run** button.

7. Click the funnel icon to edit the filter, change the time period to **Last Year**, and press the **Run** button.
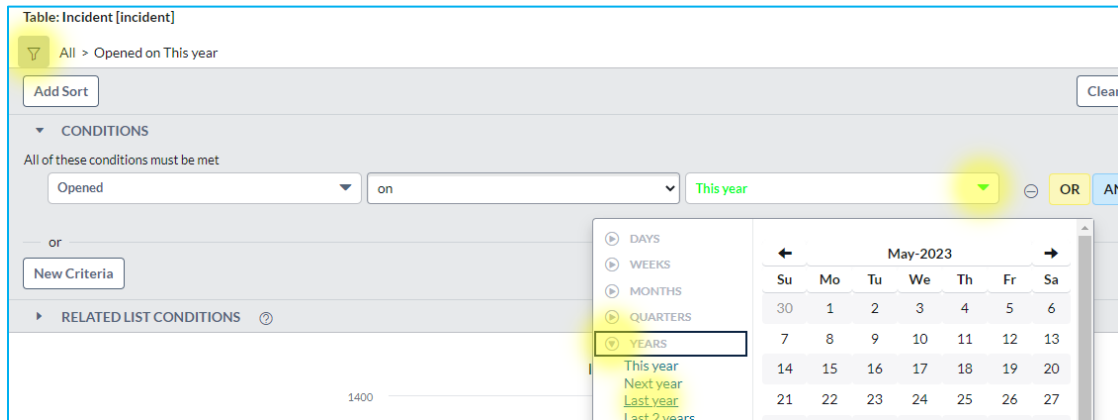
8. Update the title to **Incidents Opened per Week (Last Year)**; then, use the caret icon to expose the save options. Click **Insert and Stay**.
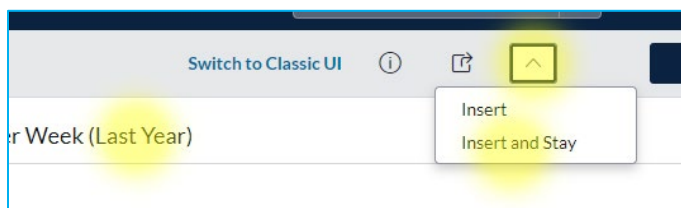
REPORT DESIGNER

At times, creating a new report is needed. Custom reports can be shared and distributed with others.

1. Log into the ServiceNow platform at https://auburn.service-now.com.

2. In the top navigation bar, click **All** to bring up the application navigator, filter for **reports**, and select **View / Run**.

3. Press the **Create a report** button.

4. On the **Data** pane, use the following values, then press the **Next** button:
   - Report name: **Closed Tasks (Last Month)**
   - Source type: **Table**
   - Table: **Catalog Task [sc_task]**

5. On the **Type** pane, choose the **Bar** type, then press the **Next** button.

6. On the **Configure** pane, use the following values, then press the **Next** button:
   - Group by: **Assignment group**
   - Additional group by: **Reassignment count**, **Priority**, *any others*
   - Display data table: **checked**
   - Max number of groups: **15**
   - Show Other: **unchecked**

7. On the **Style** pane, change the Chart color to **Use color palette**, then press the **Run** button.

8. Update the data filter with records **Closed on Lasted month** AND **Assignment group is not Service Desk** and press the **Run** button.

9. Take a moment to review the report. Switch the **Group by**, watch the report change, and save the report.
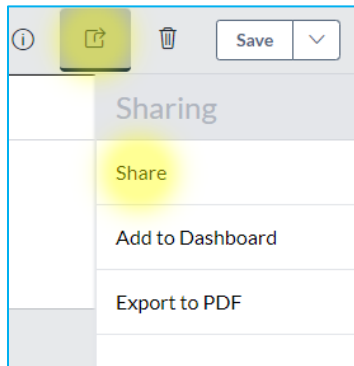

PRO TIP
"Dot Walking" is the process of accessing data from a related table through a reference data field. Look for the [+] next to a field to dot walk to its table.

CHALLENGE
Create a new pie chart report on the incident table.

SHARING AND DISTRIBUTING

1. Press the share icon and choose Share.

2. Change the **Visible to** value to **Groups and Users**, select a group, and press the **OK** button.

> **CHALLENGE**
>
> Export the report as a PDF and email it to yourself.

PERFORMANCE ANALYTICS VS. REPORTS

Report generated on a table (ex. Incident), display the *current state* of the data. Performance Analytics provides information about performance *iteratively, over time*.

DASHBOARDS

Dashboards can display multiple Performance Analytics, reporting, and other widgets on a single screen. Use dashboards to create a story with data that can be shared.

View the following dashboards for inspiration: Incident Overview, Change Overview, and Usage Statistics.