

WEEK 1 - 13

ServiceNow Reporting: A Comprehensive Guide

This document will guide you through ServiceNow's reporting capabilities, from understanding the various report types to creating, managing, and sharing reports effectively. We'll explore how to leverage reporting to gain valuable insights into your ServiceNow data and make informed decisions.

Types of Reports in ServiceNow

ServiceNow offers a variety of report types to suit different needs and data analysis objectives. The most common types include:

- List Reports
- Summary Reports
- Pivot Reports
- Chart Reports
- Performance Analytics Reports

Each report type serves a specific purpose and utilizes different visualization techniques to present data effectively.

Creating a List Report

List reports present data in a tabular format, similar to a spreadsheet. They are ideal for displaying a detailed list of records with specific attributes. To create a list report, you can follow these steps:

1. Navigate to the reporting module in ServiceNow.
2. Select "Create New" and choose "List Report".
3. Configure the report by selecting the table, fields to display, and any filters or sorting options.
4. Customize the report layout and format as needed.
5. Save the report for future use.

Creating a Summary Report

Summary reports provide a concise overview of data, aggregating information based on specified criteria. They are useful for understanding key metrics and trends. To create a summary report:

1. Navigate to the reporting module and select "Create New".
2. Choose "Summary Report".
3. Configure the report by selecting the table, fields to aggregate, grouping criteria, and any filters.

4. Customize the report layout and format to display the desired data visualization.
5. Save the report.

Creating a Chart Report

Chart reports offer a visual representation of data, using charts and graphs to highlight trends and patterns. To create a chart report:

1. Navigate to the reporting module and select "Create New".
2. Choose "Chart Report".
3. Configure the report by selecting the table, fields to chart, chart type, and any filters.
4. Customize the chart's appearance and formatting to ensure clear visualization.
5. Save the report.

Managing and Sharing Reports

Once you've created your reports, you can manage them efficiently through the ServiceNow reporting module. This includes:

- Editing existing reports to update filters, fields, or formatting.
- Scheduling reports to run automatically and deliver results via email or other channels.
- Sharing reports with specific users or groups to ensure access to relevant data.
- Creating dashboards to display multiple reports in a cohesive format.

Effective report management ensures that data is accessible, accurate, and readily available for informed decision-making.

Report Security and Access Controls

ServiceNow provides robust security controls to manage access to reports. You can set specific permissions for users and groups, ensuring that only authorized individuals can view, edit, or share reports. This is crucial for maintaining data confidentiality and integrity.

When sharing reports, you can define various access levels, including:

- View Only: Allows users to view the report without making any changes.
- Edit: Grants users permission to modify the report's configuration and content.
- Share: Enables users to share the report with other individuals or groups.

By carefully managing report access, you can ensure that data is shared appropriately and securely.

Leveraging Reports for Data-Driven Decisions

ServiceNow reports are a powerful tool for gathering insights into your data and informing key business decisions. By effectively utilizing reporting capabilities, you can:

- Track key performance indicators (KPIs) and identify areas for improvement.
- Analyze trends in ServiceNow data to anticipate future needs and challenges.
- Generate reports for stakeholders to demonstrate progress and communicate key findings.
- Optimize processes and workflows by understanding the impact of changes on various metrics.

Embrace ServiceNow's reporting features to unlock the potential of your data and drive data-driven decision-making within your organization.