

Get Started with Reports

Report Sources

Lab 1.2

15 minutes

Lab objectives

In this lab, you create a report using an existing data source. You also create a new data source and leverage it to create a new report.

A. Use a data source to create a Report

In this section, you create a new report using an existing data source.

1. Navigate to **Reports > Create New**.
2. While on the **Data** tab, define the report as shown:

Report name: **All Open Incidents**

Source type: **Data source**

Data source: **Incidents.Open (Incident)**

Data > Type > Configure > Style

* Report name
All Open Incidents

* Source type
Data source

* Data source
Incidents.Open (Incident)

Description
Incidents where active is true

Table
Incident

Applied conditions
Active = true

3. Review the **Data Source**, **Description**, **Table**, and **Applied Conditions**.

< Create a report

Data > Type > Configure > Style

* Report name
All Open Incidents

* Source type
Data source

* Data source
Incidents.Open (Incident)

Description
Incidents where active is true

Table
Incident

Applied conditions
Active = true

Ask another question

Data source: Incidents.Open (Incident)
Data source conditions: Active = true

▼ All

Number	Opened	Short description
INC0010337	2022-10-25 18:13:24	Routing to oregon mail server
INC0010336	2022-10-25 17:58:24	I can't get my weather report

Note: The report **filter conditions** match **Data Source conditions**.

4. Click **Run** and preview your report to answer the following questions:
 - a. How many incidents are **Active**?
 - b. Are there any **Closed** or **Resolved** incidents in the output? Why is that?

All Open Incidents										
Number	Opened	Short description	Caller	Priority	State	Category	Assignment group	Assigned to	Updated	Updated by
INC0009009	2018-10-06 08:06:16	Unable to access the shared folder.	David Miller	4 - Low	New	Inquiry / Help	(empty)	(empty)	2019-01-19 07:30:24	admin
INC0009005	2018-10-18 04:35:21	Email server is down.	David Miller	1 - Critical	New	Hardware	Hardware	(empty)	2022-11-11 11:36:54	system
INC0009001	2018-10-19 03:56:26	Unable to post content on a Wiki page.	David Miller	3 - Moderate	New	Inquiry / Help	(empty)	(empty)	2019-01-19 07:32:42	admin
INC0008112	2019-09-04 18:46:43	Assessment : ATF Assessor	survey user	5 - Planning	New	Inquiry / Help	(empty)	(empty)	2019-09-04 18:49:28	admin
INC0008111	2019-08-28 21:04:57	ATF: Test1	System Administrator	5 - Planning	New	Inquiry / Help	(empty)	(empty)	2019-08-28 21:05:48	admin
INC0008001	2021-02-21 21:04:14	ATF:TEST2	survey user	5 - Planning	New	Inquiry / Help	(empty)	(empty)	2021-02-27 23:01:42	admin

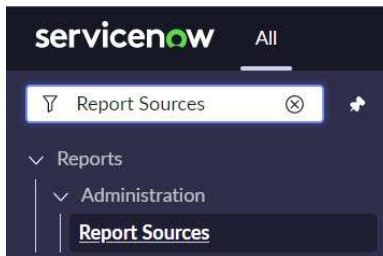
5. **Save** the report.

Note: You have created a report based on data source without defining a table and filter conditions.

B. Create a new Data Source

In this section, you create a new data source.

1. Navigate to **Reports > Administration > Report Sources**.



2. Click the **New** button.



3. Set the new report source properties as follows:

Name: **Open Incidents–High and Critical Priority**
 Table: **Incident [incident]**

4. Click the **Funnel icon** to open the condition builder.

5. Add the following conditions:

Active | is | True **AND**
Priority | is one of | 1-Critical
2-High

6. Click **Submit**.

Note: You have created a new report source that returns **Open incidents with Critical and High Priority**.

C. Leverage the New Data Source

In this section, you create a new report to leverage the data source you created in the previous section.

1. Navigate to **Reports > Create New**.
2. While on the **Data** tab, define the report as follows:

Report name: **High and Critical Open Incidents**

Source type: **Data source**

Data source: **Open incidents with Critical and High Priority**

3. Review the **Data Source**, **Description**, **Table**, and **Applied Conditions**.

Note: The report **filter conditions** match **Data Source conditions**.

4. Click **Run** and preview the report to answer the following questions:

- What are the incident priorities?
- What are the incident states? Are any incidents Closed or Resolved? Why is that?

Report Title : High and Critical Open Incidents

Ask another question

Data source: Open incidents with Critical and High Priority (Incident)
Data source conditions: Priority in (1 - Critical, 2 - High) AND Active = true

▼ All

High and Critical Open Incidents										
Number ▼	Opened	Short description	Caller	Priority	State	Category	Assignment group	Assigned to	Updated	Updated by
INC0009005	2018-10-11 04:35:21	Email server is down.	David Miller	1 - Critical	New	Hardware	Hardware	(empty)	2022-11-03 10:49:26	system
INC0007001	2018-11-16 05:47:10	Employee payroll application server is down.	David Miller	1 - Critical	New	Hardware	Openspace	(empty)	2022-10-30 17:13:26	system
INC0006874	2022-10-30 12:38:28	Getting automatically logged out from Workday Human Capital Management	John Retak	2 - High	In Progress	Software	HR Systems Support	Charity Dyckman	2022-11-02 09:47:33	maint
INC0006872	2022-10-30 12:20:33	Error opening page in HireRight Reports	Sam Sorokin	1 - Critical	New	Software	HR Systems Support	Randal Gansen	2022-11-02 09:47:33	maint

5. **Save** the report.

Congratulations!
You completed the Report Sources Lab.