Get Started with Reports
Working with Dashboards

Lab 3.3 25 minutes

Lab objectives

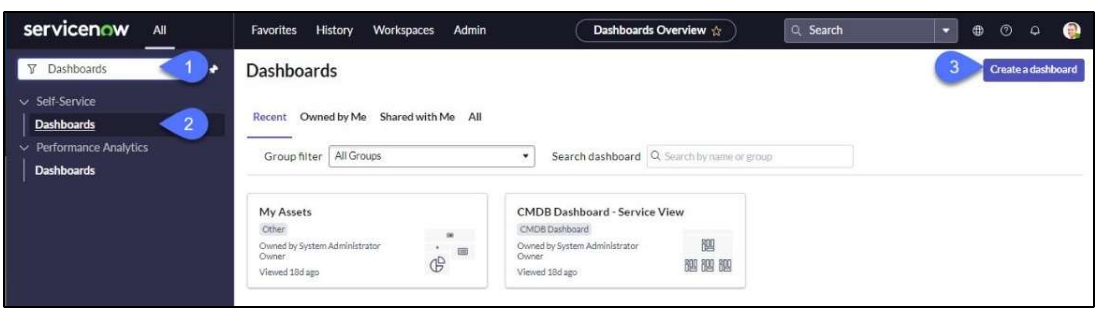
In this lab, you perform the following:

- Create a new dashboard
- Add report widgets to the dashboard
- Apply layout to the dashboard
- Share the dashboard with stakeholders

A. Create a Personal Dashboard

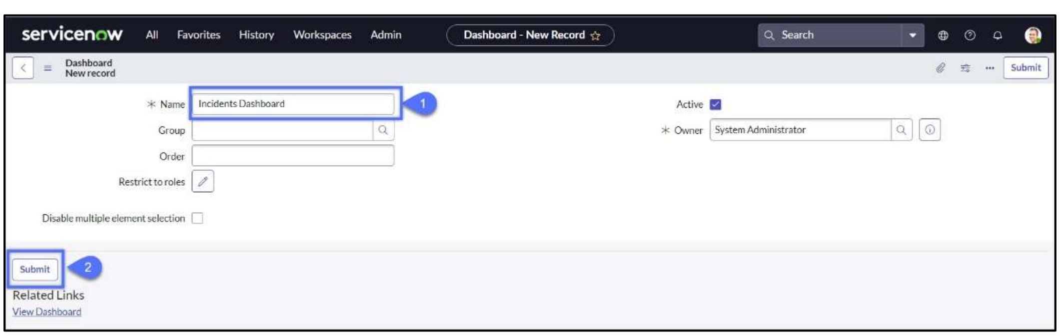
1. Navigate to **Self-Service > Dashboards**.

2. Click the **Create a dashboard** button.



3. Set the dashboard **Name** to **Incidents Dashboard** .

4. Click the **Submit** button.



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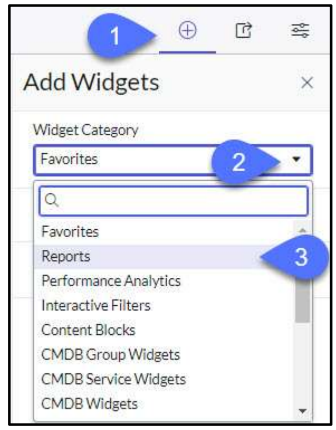
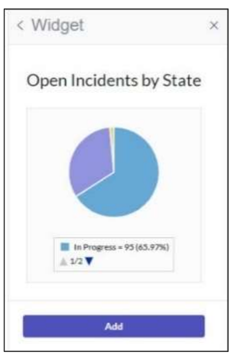
B. Add an Existing Report to Dashboard

Follow these steps to add an existing report to your Dashboard.

1. Click the **Add widget icon (+)** to go into editing mode.
2. Click the **Widget Category** drop-down and select **Reports**.

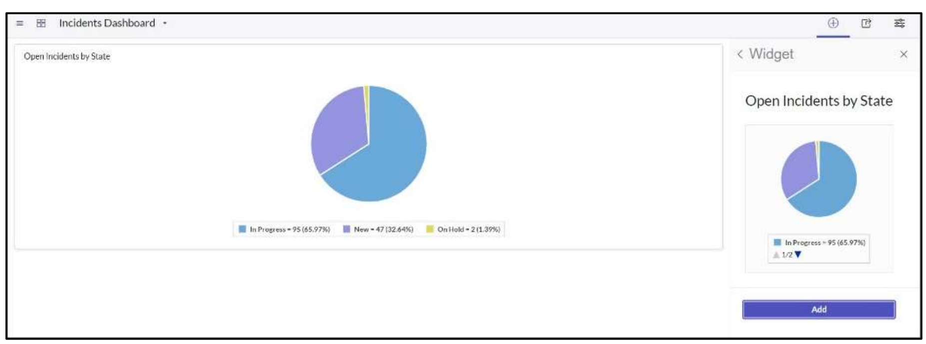


3. Type **Open Incidents by State** in the **Filter field**.
4. Select the **Open Incidents by State report** from the list and click **Add**.



5. Verify that the report is now added to your dashboard and answer the following:

   a. How many New/In Progress/On Hold incidents do you see in your **Open Incidents by State** report?



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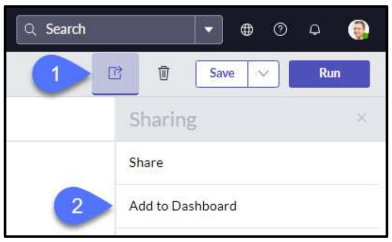
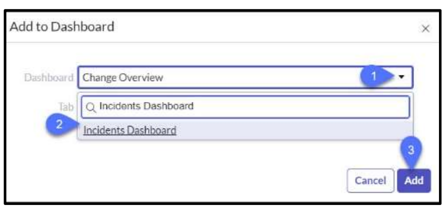
C. Add a Report Widget from the Report Designer

Follow these steps to add a report from the Report Designer.

1. Navigate to **Reports > View / Run.**
2. Search for and open the **Open Incidents older than 30 Days** report.
3. Click the **share icon** and select the **Add to Dashboard** option.

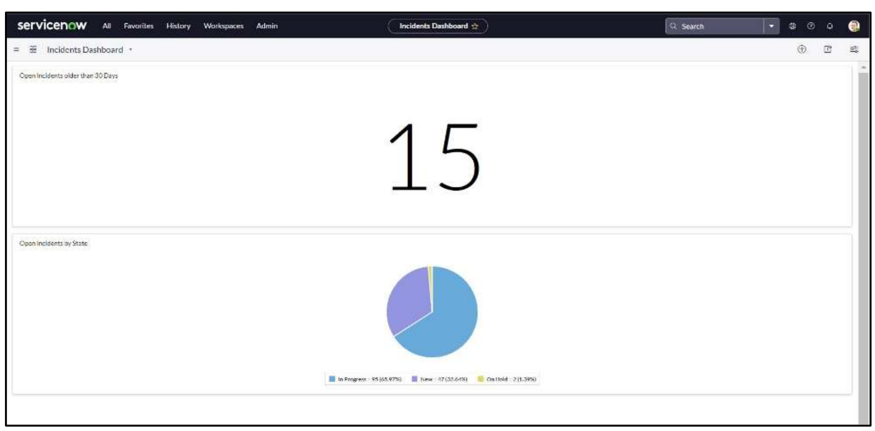


4. Click **Dashboard** and select **Incidents Dashboard** from the dropdown.
5. Click the **Add** button.



6. Verify that the report is now added to your dashboard and answer the following:

   a. How many open Incidents that are older than 30 days are present?



Note: *Your data generated for the reports may vary.*

D. Create a New Report Widget

Follow these steps to create and add a new report widget to your Dashboard.

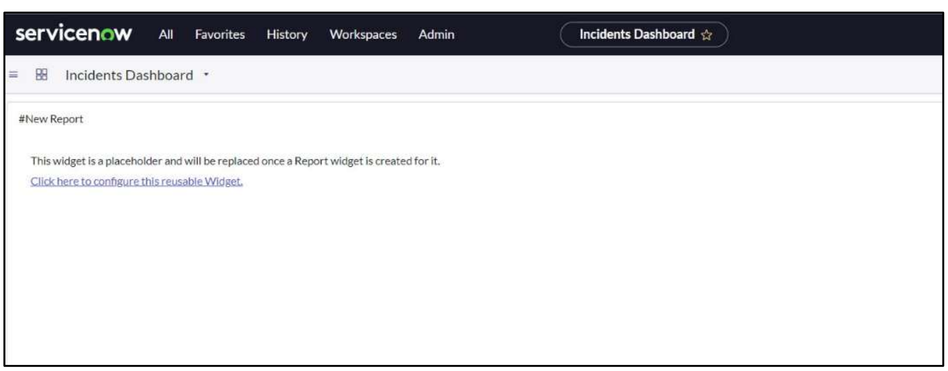
1. Click on the **Add widget icon (+)** to go into editing mode.

2. Click the **Widget Category** drop-down and select **Reports**.

3. Click **#New Report**, then click **Add**.

Note: *On clicking **Add** button, a new placeholder appears on the dashboard.*

4. Click the link **Click here to configure this reusable widget**. This takes you to the Report Designer.

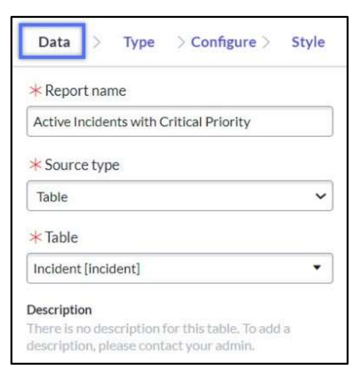


5. While on the **Data** tab, define the report as shown:

   Report name: **Active Incidents with Critical Priority**

   Source type: **Table**

   Data source: **Incident [incident]**

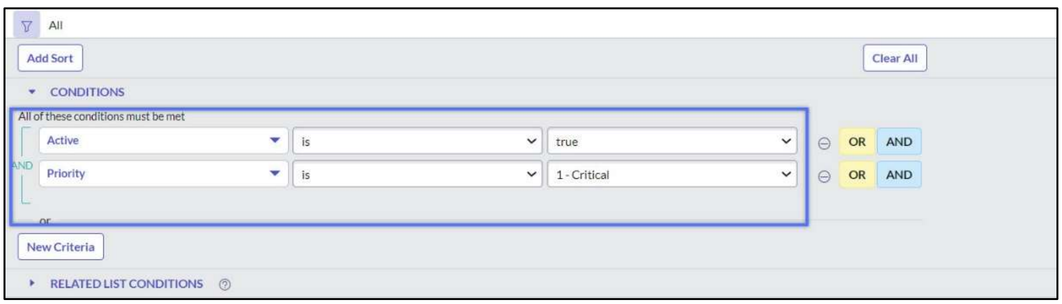


6. Click **Next** or select the **Type** tab to open the **Type** section.

7. Type **List** in the **Filter the visualizations** text box and select **List** type.

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

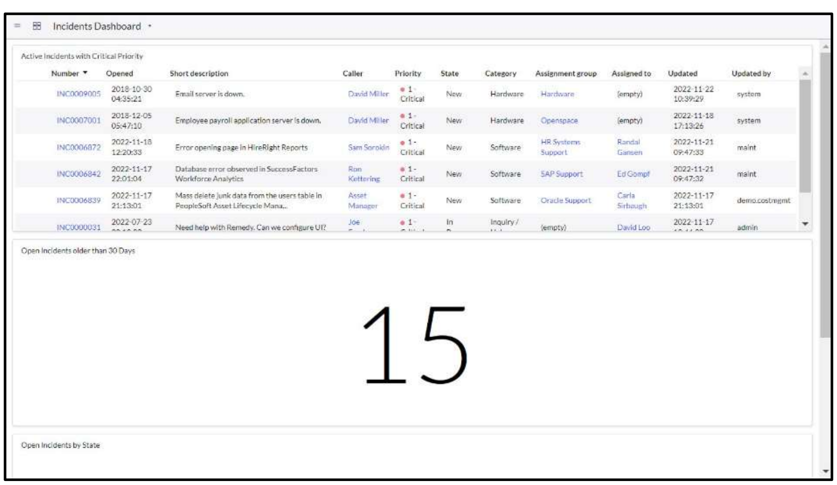
9. Set the condition to **Active** | **is** | **True** AND
Priority | **is** | **1-Critical**



10. **Save** the report.

Note: *Clicking **Save** button automatically takes you to the dashboard.*

11. Confirm that the report is now added to your dashboard.

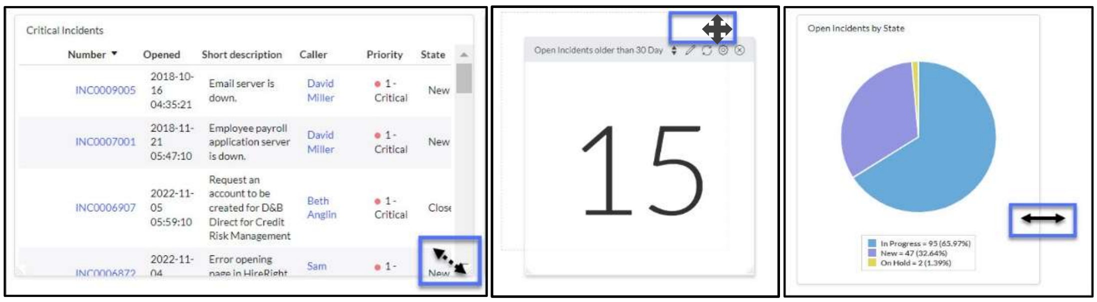


E. Dashboard Layout

Follow these steps to configure the dashboard layout and share your dashboard with stakeholders.

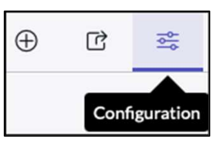
1. Click on the **Add widget icon (+)** to go into editing mode.

2. Hover over your widgets and practice resizing and repositioning the widgets as shown:



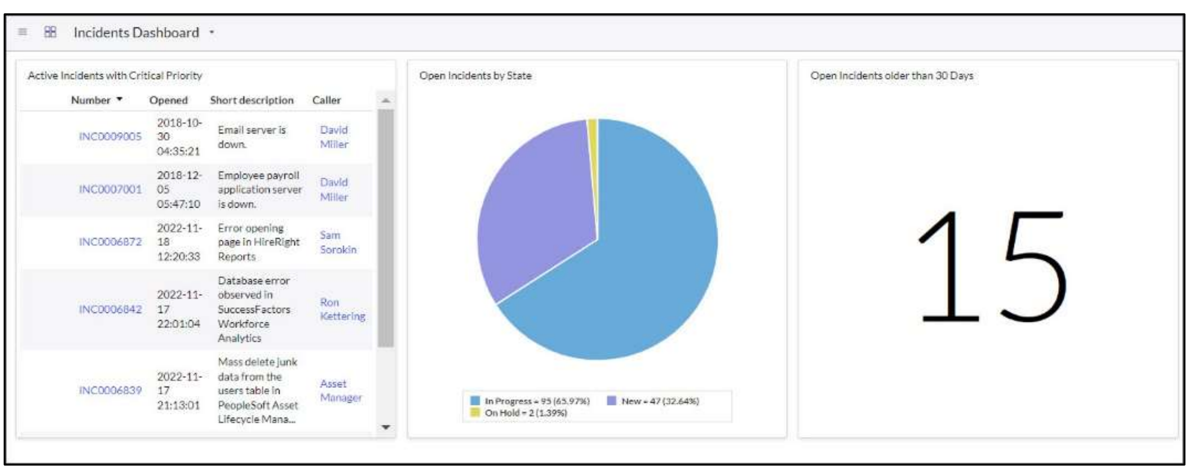
Note: *You need to be in Edit mode (Add Widgets, Configuration, or Share panel needs to be open) to be able to perform any dashboard and layout changes.*

3. Click the **Configuration** icon on the Dashboard banner.



4. Apply the 1st layout in the list of quick layouts (3x3).

5. Verify your dashboard looks similar to this:

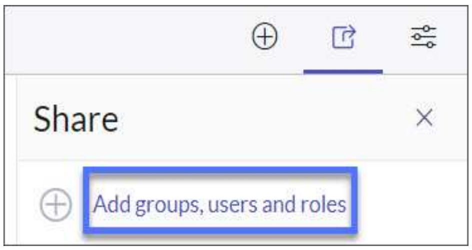


F. Dashboard Sharing

Follow these steps to share your personal dashboard with the stakeholders.

1. Click the share icon  on the dashboard banner.

2. Click the **Add groups, users, and roles** button.



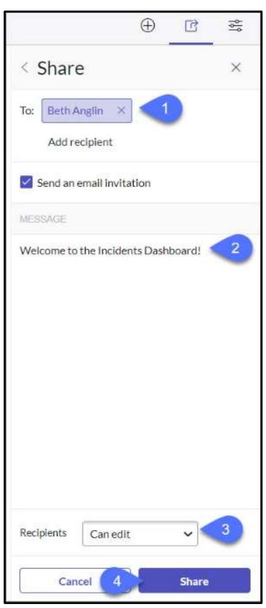
3. Add **Beth Anglin** to the list of dashboard users.

4. Set the Message to **Welcome to the Incidents Dashboard!**

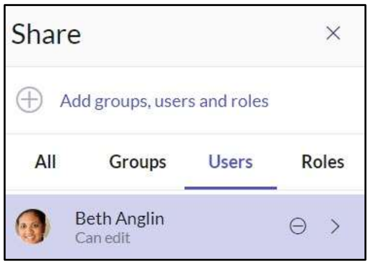
5. Set the **Recipients** to **Can edit.**

   Tip: *You can either be a Dashboard **owner** or have **Can view** or **Can edit** access for a specific dashboard*.

6. Click the **Share** button.



7. Confirm that the sharing panel list shows **Beth Anglin** under **Users** section.



Note: *An email notification will be sent to your newly added users and group members (Beth Anglin) informing them that they have been given dashboard access.*

Congratulations! You have completed the Working with Dashboards lab.