

Get Started with Reports

Summary Reports – Bars and Columns

Lab 2.1

10 minutes

Lab objectives

In this lab, you enhance a Bar report with various grouping and aggregation properties. You also explore different formatting and output options.

A. Define a Bar Chart

In this section, you create a new report to generate a Bar chart and configure that report to compare incidents by their Priority.

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

Report name: **Open Incidents by Priority**

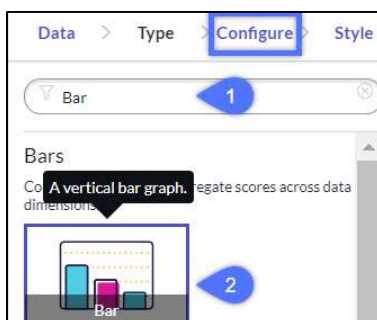
Source type: **Table**

Table: **Incident [incident]**

The screenshot shows the 'Data' tab configuration in ServiceNow. The 'Data' tab is selected, and the configuration is as follows:

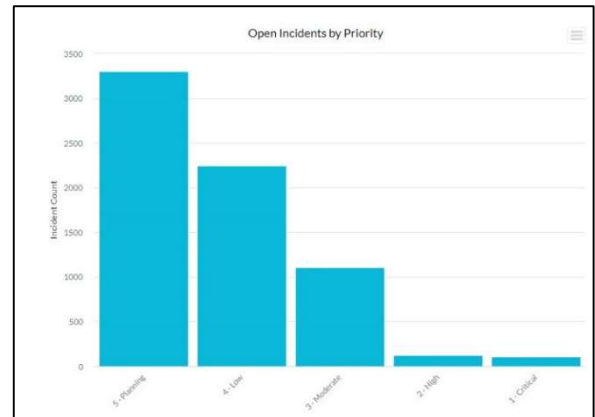
- Report name:** Open Incidents by Priority
- Source type:** Table
- Table:** Incident [incident]
- Description:** There is no description for this table. To add a description, please contact your admin.

3. Click **Next** or select the **Type** tab to open the **Type** section.
4. Type **Bar** in the **Filter the visualizations** text box and select the **Bar** type.



5. Click **Next** or select the **Configure** tab to open the **Configure** section.
6. Click **Group by** dropdown and select the **Priority** attribute.

7. Click **Run** to preview your bar chart and answer the following questions:
 - a. How many incidents have **4-Low** priority?
 - b. Which priority group has the highest number of open incidents?



8. **Save** the report.

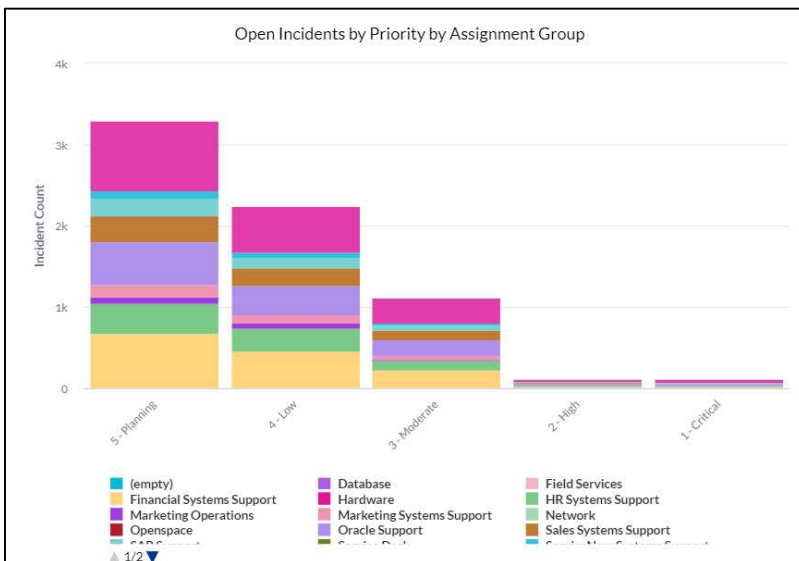
B. Add a Stack by Attribute

In this section, you group the incidents in each Priority by Assignment Group.

1. If necessary, reopen the **Open Incidents by Priority** report you created in the previous section.
2. Navigate to the **Configure** tab.
3. Click the **Stack by** dropdown and select **Assignment Group**.

4. Click the **Report Title** and change it to **Open Incidents by priority and Assignment Group**.

5. Click **Run** to preview your bar chart and answer the below questions:
 - a. How many incidents with **5-planning** priority are assigned to the **Financial Systems Support** Group?
 - b. How many incidents are not assigned to any Assignment Group?



6. Click **Insert and Stay** to insert a new report and stay on the current page.

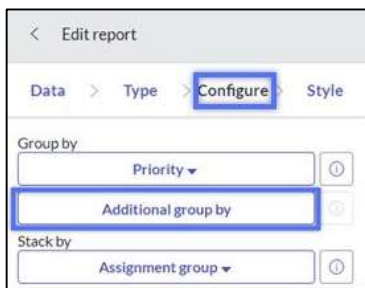


Note: **Insert and Stay** generates and saves a new report with the data you provided, and the user stays on the current page.

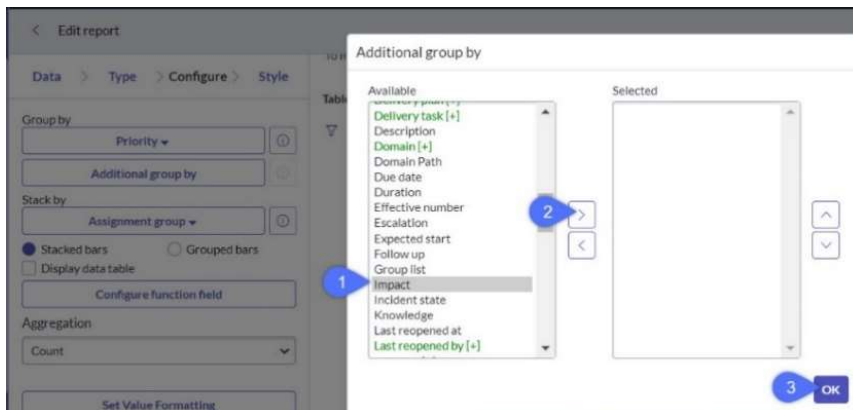
C. Using Additional Group by Attribute

In this section, you add the ability to group incidents by an additional attribute.

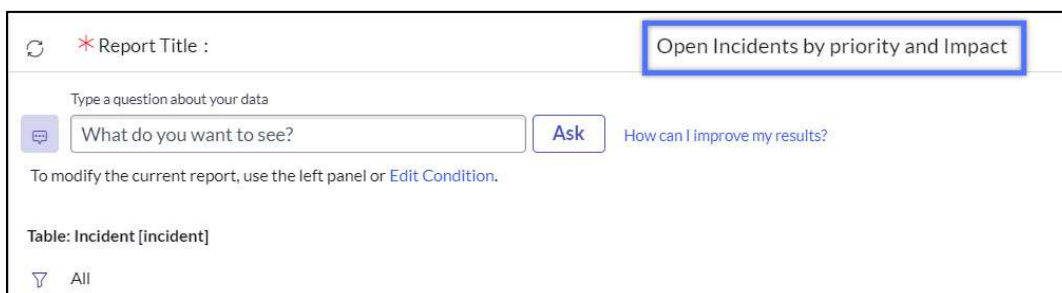
1. If necessary, reopen the **Open Incidents by priority and Assignment Group** report created in the previous section.
2. Navigate to the **Configure** tab,
3. Click **Additional group by** to select an additional group by field.



4. Move the **Impact** field from the **Available** to **Selected** list using the arrow.
5. Click **OK**.



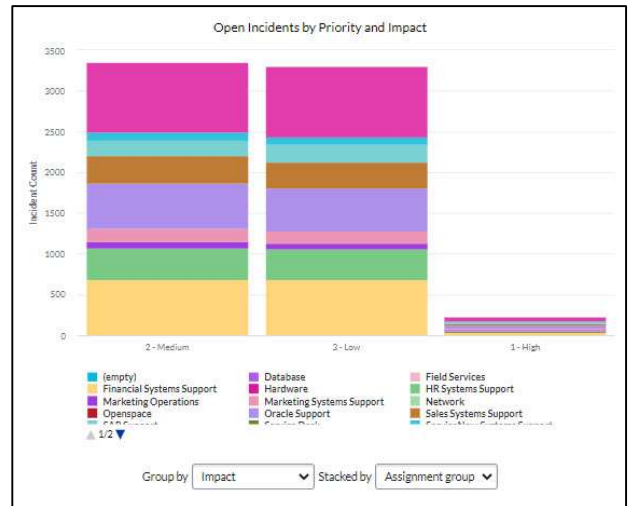
6. Click the **Report Title** and change it to **Open Incidents by Priority and Impact**.



7. Click **Run** and take a note of the two dropdowns below the report output.
8. Organize your report data as specified:

Group by: **Impact**
Stacked by: **Assignment Group**

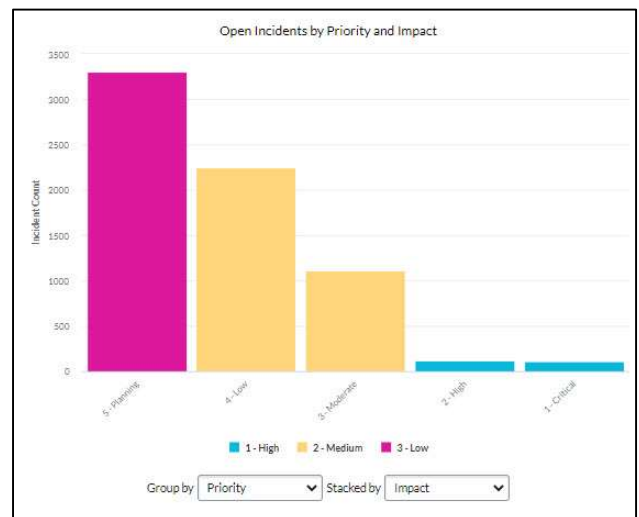
Question: What is the total number of **Financial System Support** incidents with **Medium** Impact?



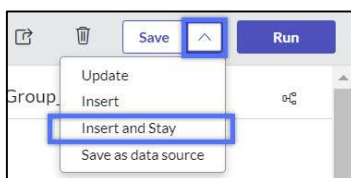
9. Again, organize your report data as specified:

Group by: **Priority**
Stacked by: **Impact**

Question: What is the total number of **Low** priority and **Medium** impact incidents?



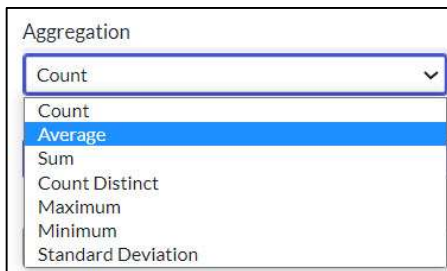
10. Click **Insert and stay** to insert a new report and stay on the current page.



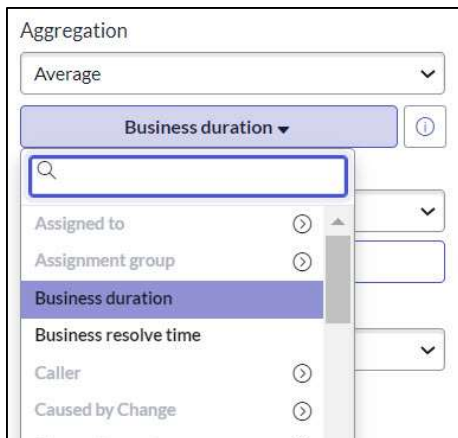
D. Using Aggregation

In this section, you build a report to calculate the average business duration of incidents in each priority.

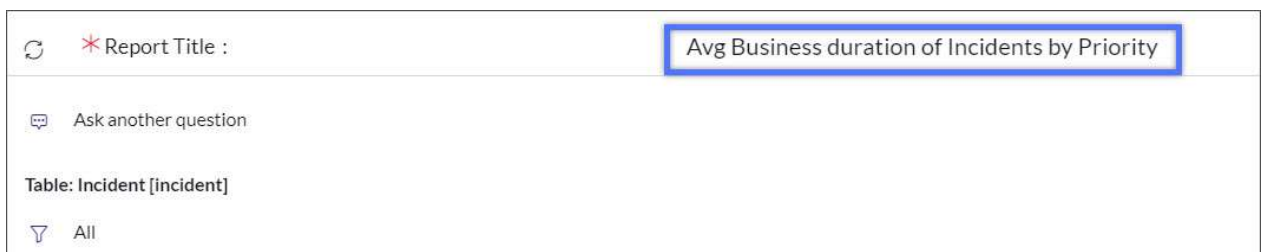
1. If necessary, reopen the **Open Incidents by priority and Impact** report created in the previous section.
2. Navigate to the **Configure** tab.
3. Click the **Aggregation** dropdown and select **Average**.



4. Select **Business Duration** from drop down.

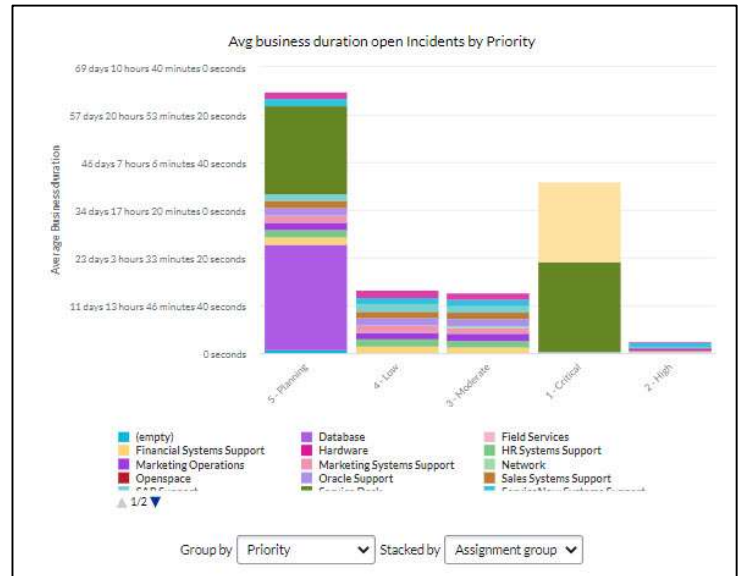


5. Click the **Report Title** and change it to **Avg Business duration of Incidents by Priority**.



6. Click **Run** to preview your report and answer the below questions:

- Which **Assignment group** has the incidents with the longest business duration?
- Which **Assignment Groups** are handling the **Critical** incidents?
- Which **Assignment group** is able to handle them faster?



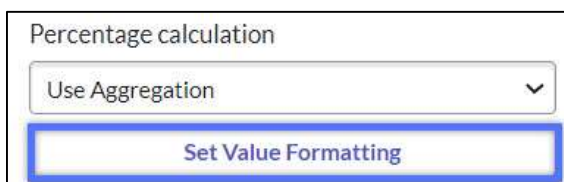
7. Click **Insert and stay** to insert a new report and stay on the current page.



E. Formatting and Presentation

In this section you make modifications to the date format.

- If necessary, reopen the **Avg Business duration of Incidents by Priority** report created in the previous section.
- Navigate to the **Configure** tab,
- Select the **Set Value Formatting** button to open **Value Formatting** dialog.

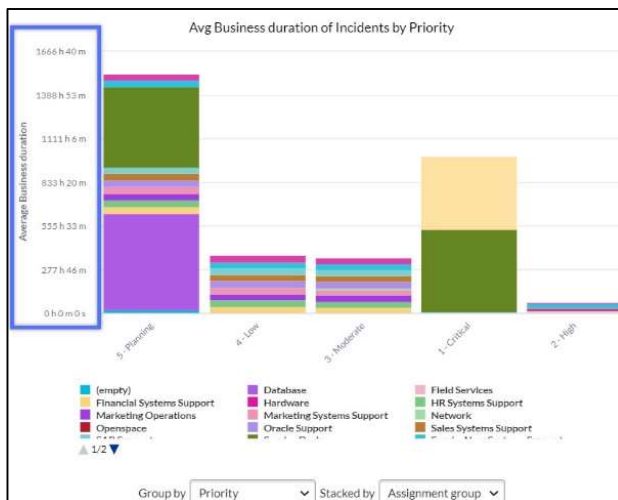


4. Change the **Unit Format** to **d/h/m/s**.
5. Change the **Maximum duration unit** to **Hour**.
6. Click **Submit**.

The 'Value Formatting' dialog box is shown with the 'Business duration' tab selected. It contains the following fields and options:

- Unit format:** A dropdown menu with 'd/h/m/s' selected. A blue circle with the number '1' is next to it.
- Maximum duration unit:** A dropdown menu with 'Hour' selected. A blue circle with the number '2' is next to it.
- Minimum duration unit:** A dropdown menu with 'Second' selected.
- Hide seconds when duration is greater than one minute:** A checked checkbox.
- Example:** A text box showing '3 h 42 m 24 s'.
- Buttons:** 'Cancel' and 'Submit' buttons at the bottom right. A blue circle with the number '3' is next to the 'Submit' button.

7. Verify the changes in the default duration format from **Days/Hours/Minutes/Seconds** to **d/h/m/s** and minimum duration unit from **day** to **Hours** along the Y-axis.



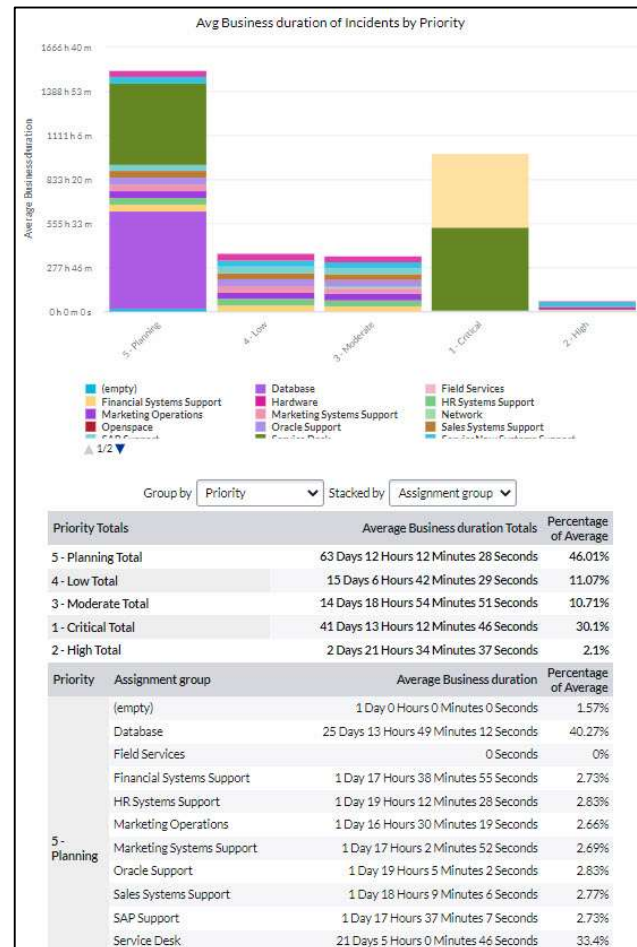
8. Click the **Display data table** check box to add the list of the records used in creating the report output.

The 'Stack by' configuration dialog box is shown. It contains the following elements:

- Stack by:** A dropdown menu with 'Assignment group' selected.
- Stacked bars:** A radio button that is selected.
- Grouped bars:** A radio button that is not selected.
- Display data table:** A checked checkbox.
- Configure function field:** A button at the bottom.

9. Click **Run** to preview your report and answer the below questions:

- What is the **Average Business duration** of incidents assigned to the **Service Desk** group with **Critical** priority?
- As per the display data table, which priority group has the incidents with the longest **Avg Business duration**?
- Which priority group has the shortest **Avg Business duration**?



10. **Save** the report.

Congratulations! You have completed the Bars and Columns lab.