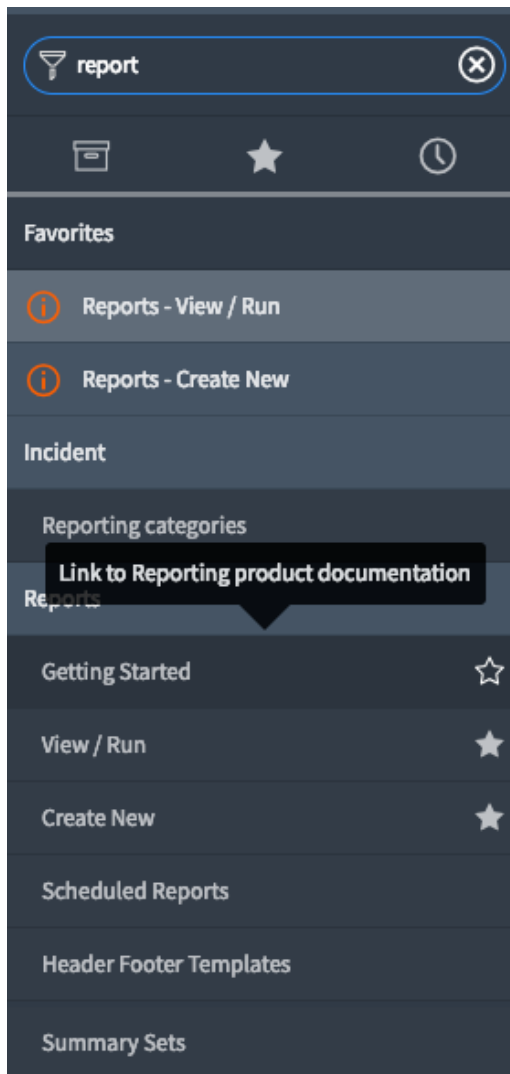Getting started with custom reports:

We're going to build a quick and dirty report to show configuration items using their "first deployed date". This report will break out your configuration items by the first deployed dates (by year) so that you can easily identify your oldest devices.

Use the filter navigator to bring up the reporting menu – click on "Create New"

Make sure that you are using the "New UI" rather than classic
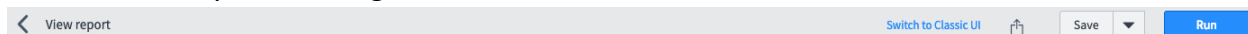
Starting with the "data" tab you can assign a report name – this name can by anything you want.

The "Source type" we are going to use will be table, however there is also a "data source" option that can be useful for other types of reports.


The "table" drop down has a ton of options. When you have some time, play around with different tables and you'll be amazed at the information that's available out there.

For this tutorial we'll be using the Hardware table because the hardware table can access both the configuration item and asset side of each device.

For the "type" we are going to use the "Trend" column type

Time Series

Visualize data over time.

Displays data as columns over time.
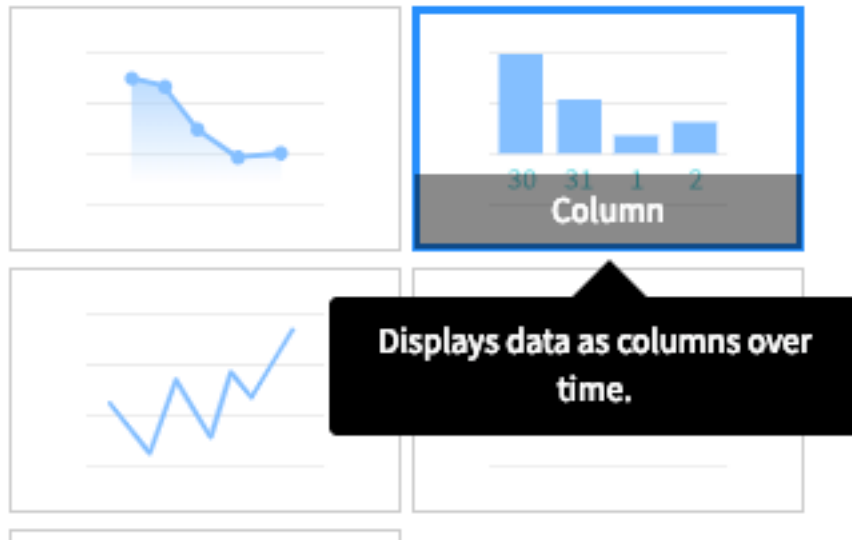
Lastly, we're going to configure the grouping and trend by settings:

Group by

--None-- ▼

Additional group by

☐ Display data table
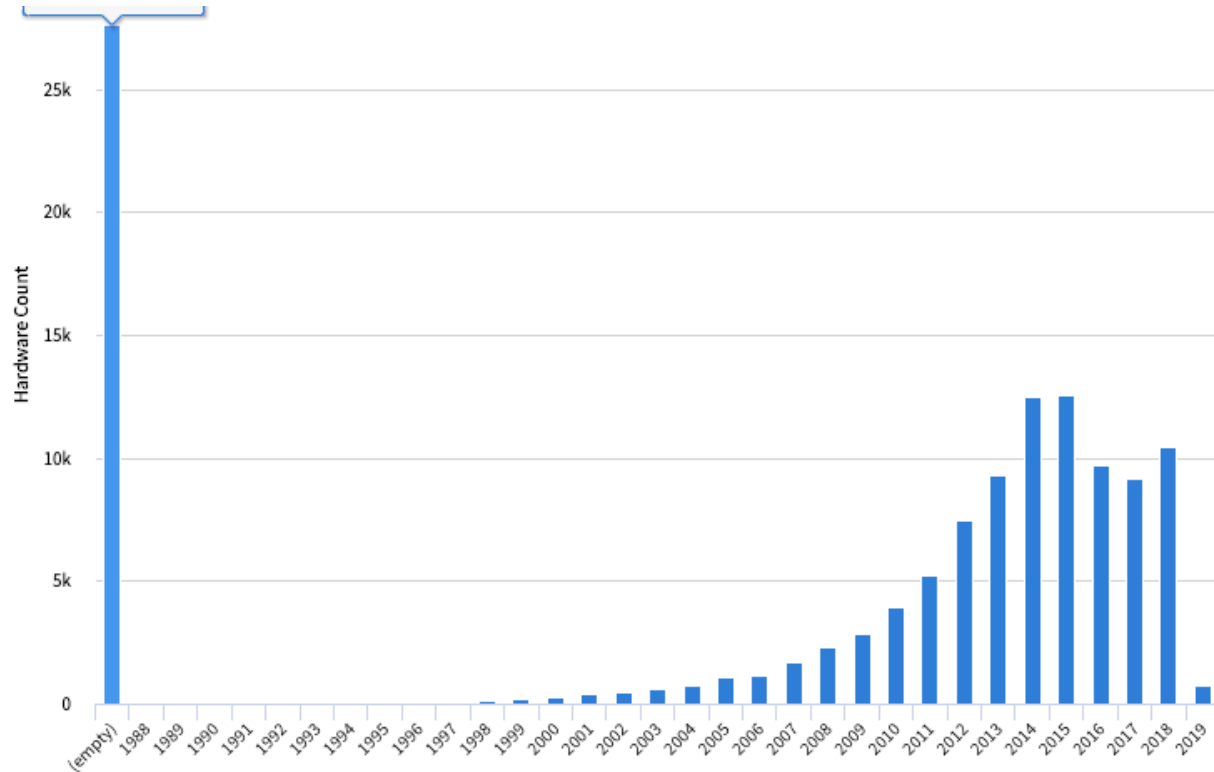
Trend by

First Deployed ▼

per

Year ▲▼

Aggregation

Count ▲▼

Here is our chart

Okay, so right now this is actually displaying ALL configuration items at Princeton. Let's narrow the results down to just our group:

Click on the filter icon and a list of available conditions should come up. For the conditions start by selecting the first box and changing this field to "Primary support group"

Primary support group ▼

For our second box there is an awesome option called "is dynamic" which does a lot of the work for us when creating reports, go ahead and select that option.

is (dynamic) ⬍

Lastly we have two options: either "One of my groups" or "Not one of my groups" – Select "One of my groups"

One of My Groups ⬍

Table: Hardware [alm_hardware]

All > Primary support group is (DCS-CES-UScheduling, DCS-TTPS, DCS-University Services, DCS-Mail Services IT, DCS-Housing, DCS-Dining, DCS-University Services Analytics, DCS-Printing, DCS-Venue Services, Infoblox Ambassadors)

| Add Sort | | | | Clear All | ✕ |

▼ **CONDITIONS**

All of these conditions must be met

| Primary support group ▼ | is (dynamic) ⬍ | One of My Groups ⬍ | ⊖ | OR | AND |

or

| New Criteria |

▶ **RELATED LIST CONDITIONS** ⑦

Computers by First Deployed Date
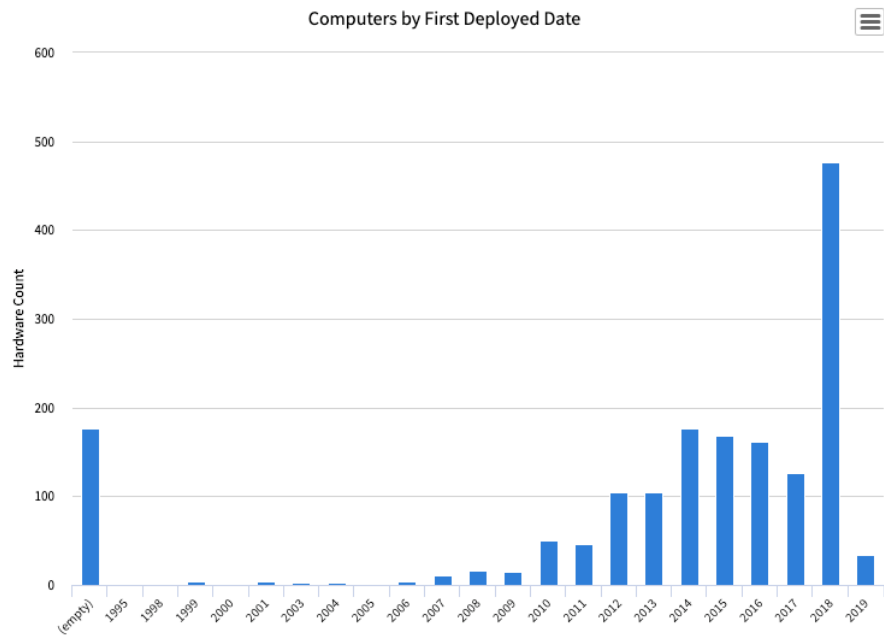
With a single filter condition, we have managed to limit our report to devices belonging to only our departments. However, we still have an outlier called "empty". For the sake of this report (and in reality, many reports you'll go on to build yourself, this is often junk information -BUT NOT ALWAYs.) We are going to eliminate these devices from this report just for testing.

For our second filter condition we are going to select the "and" option and use the following criteria:

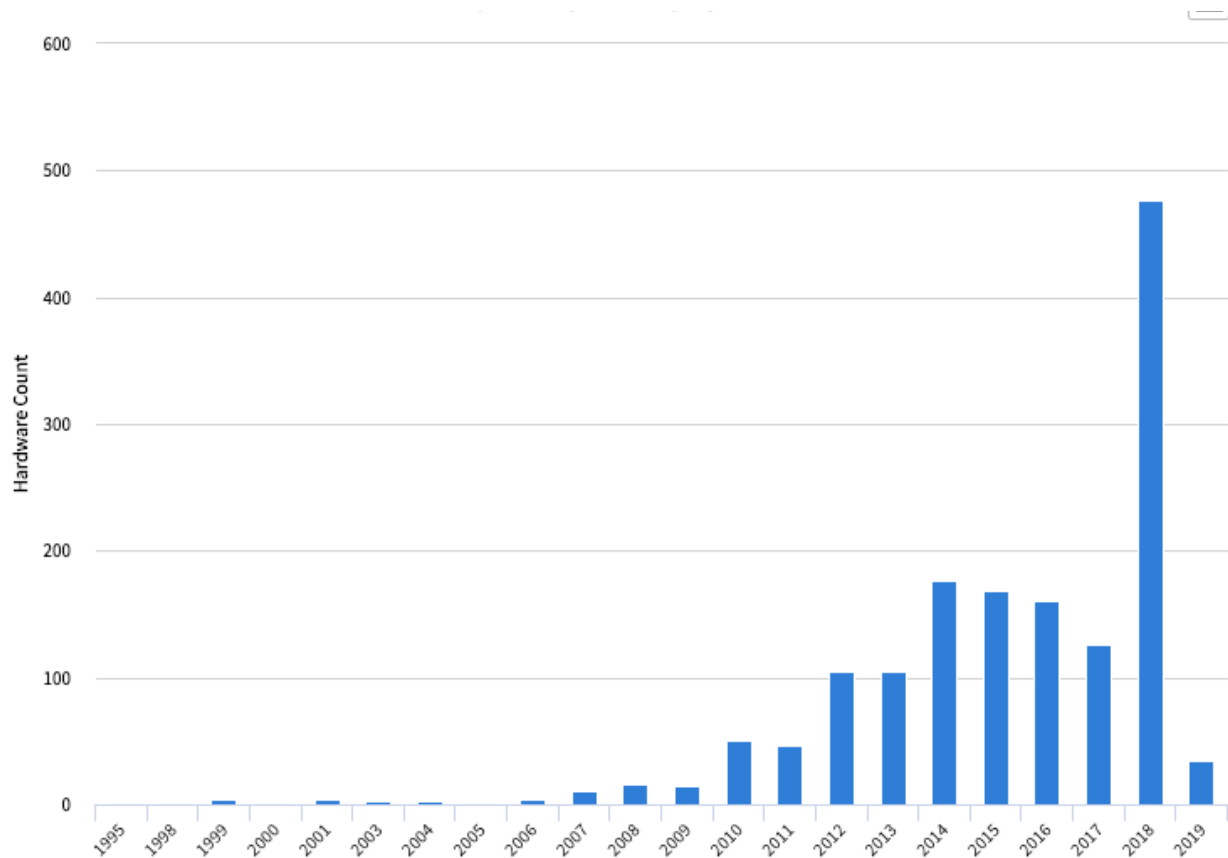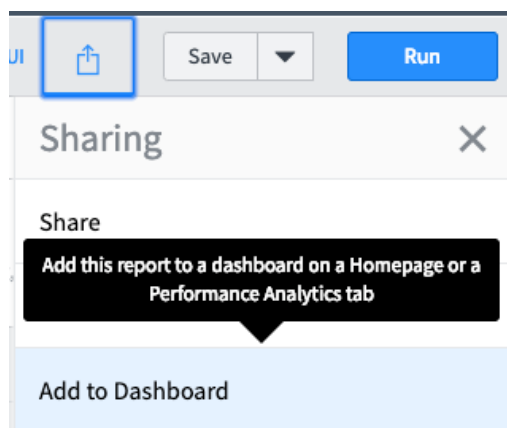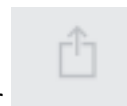| Primary support group ▼ | is (dynamic) ⬍ | One of My Groups ⬍ | ⊖ | OR | AND |
| First Deployed ▼ | is not empty ⬍ | | ⊖ | OR | AND |

Next, click on the sharing icon in the top righthand corner

Share gives you a quick view that allows you to share the report – you'll need to share the report in order to let other members of your team view it:

Sharing settings

Visible to : ○ Me   ○ Everyone   ● Groups and Users

| Groups | Users |

Groups:

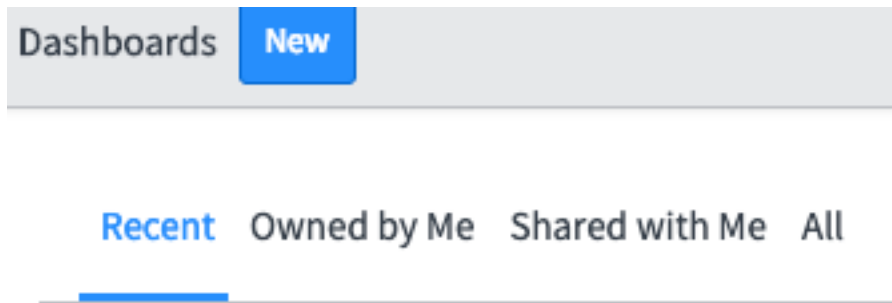DCS-University Services   ✕

ⓘ

🔍

Save your report: **Save**

Now that you've created your own report, let's add it to a dashboard.

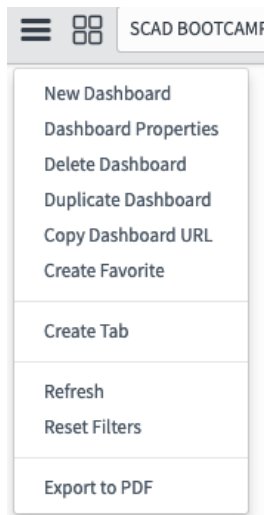First, go back to your filter navigator and search for "Self-Service Dashboards"

Dashboards New

Recent Owned by Me Shared with Me All

Select "New"

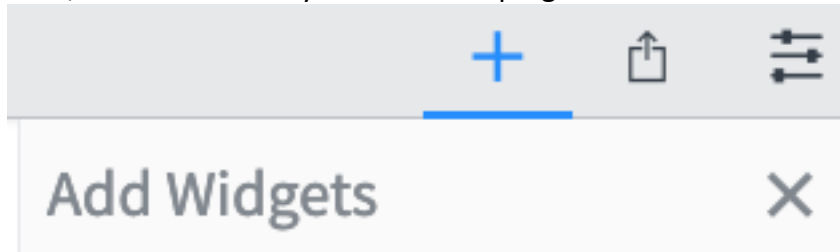✳ Name   SCAD BOOTCAMP - KG3

Order

Restrict to roles   ✏

Submit

Submit your new dashboard and you'll be brought to a blank canvas.

Next, click on the hamburger menu in the top left hand corner of your new dashboard and select "Create Favorite" – this will allow you quick access to your dashboard later on.

☰ 🔠 SCAD BOOTCAMP

New Dashboard
Dashboard Properties
Delete Dashboard
Duplicate Dashboard
Copy Dashboard URL
Create Favorite

Create Tab

Refresh
Reset Filters

Export to PDF

Next, click on the "+" symbol in the top right hand corner to bring up the add widgets menu

From the dropdown box – select "Reports"

This will bring up a list of your personally created reports – go ahead and select the report we just created "Computers by First Deployed Date"
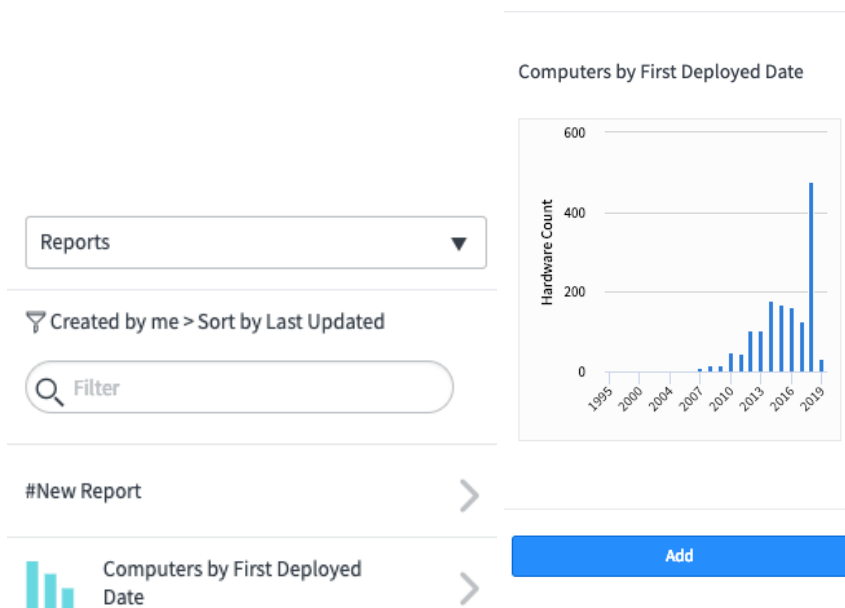
Select "Add"

Close the "Add Widget" panel

You've just created your first custom dashboard!

From here you can resize/customize and add additional widgets to meet your own departmental needs.

Lastly – go back to your "Favorites" menu in the filter navigator and you should see the dashboard listed as a favorite on your list. This will allow you to quickly navigate to your new dashboard!