| ServiceLink Reports |

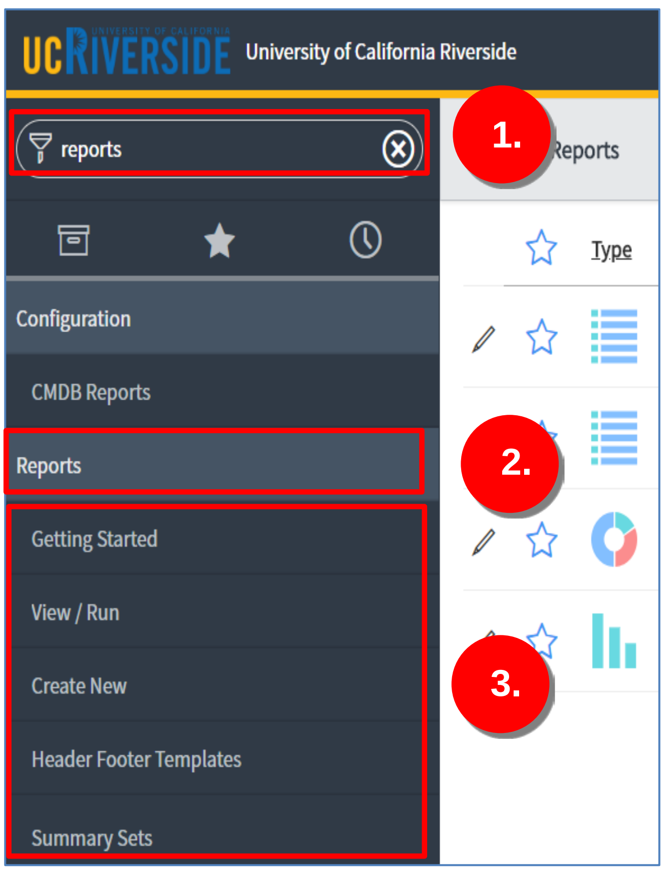
Navigation: https://ucrsupport.service-now.com/

Required Role: ServiceLink Fulfiller (both Accountability Structure & Shared Services Center)

ServiceNow reports are visualizations of your data that you can share with users on dashboards and service portals, export to PDF, and send via email.

Accessing ServiceLink Reports

ServiceLink Reports can be accessed by all Fulfiller roles. ServiceLink initiators do not have access to create or run reports.



1. To search for the Reports application, type the word “Reports” in the Filter Navigator on the left hand-side of your screen.

2. ServiceLink applications that match your query will populate. Click on the Reports application. To make finding the application easier to find in the future, you can favorite it.

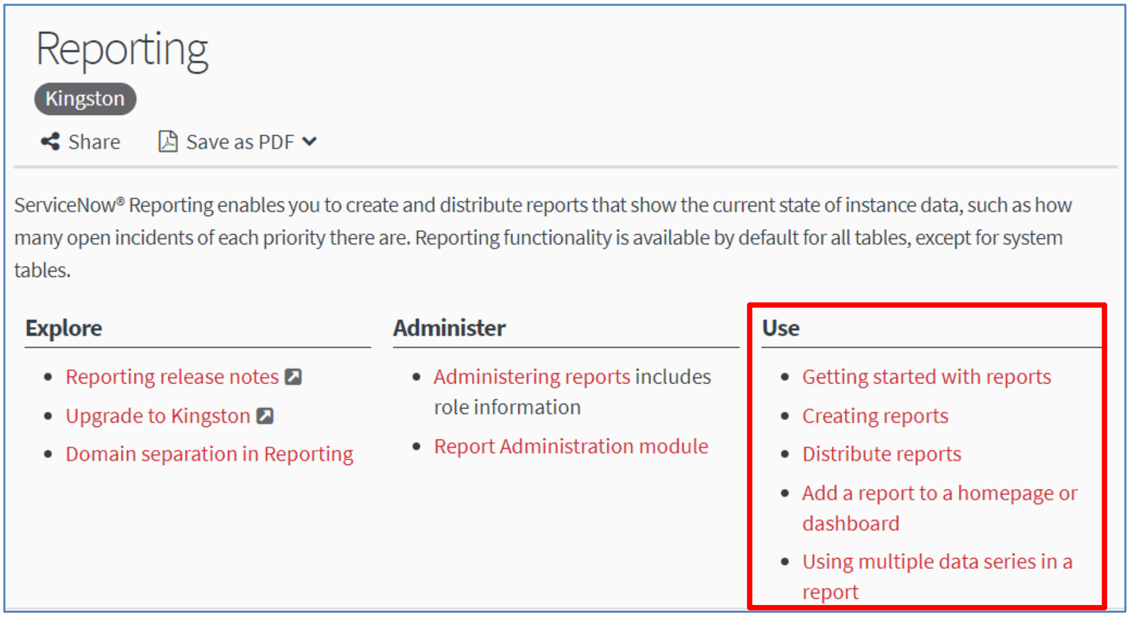
NOTE: To favorite an application, simply hover over the application name. The outline of a star will appear. Click on the star icon. This action will favorite all modules under the Reports application. You will now be able to find them under the star tab without needing to search for the application in the filter navigator, as shown in steps 1. and 2.

3. There are a total of five (5) modules under the Reports application. These are:
   i. Getting Started
   ii. View / Run
   iii. Create New
   iv. Header Footer Templates
   v. Summary Sets

You will mostly be using the View / Run and Create New application when creating, running, viewing, editing, and sharing reports in ServiceLink. Each application is described in greater details below.

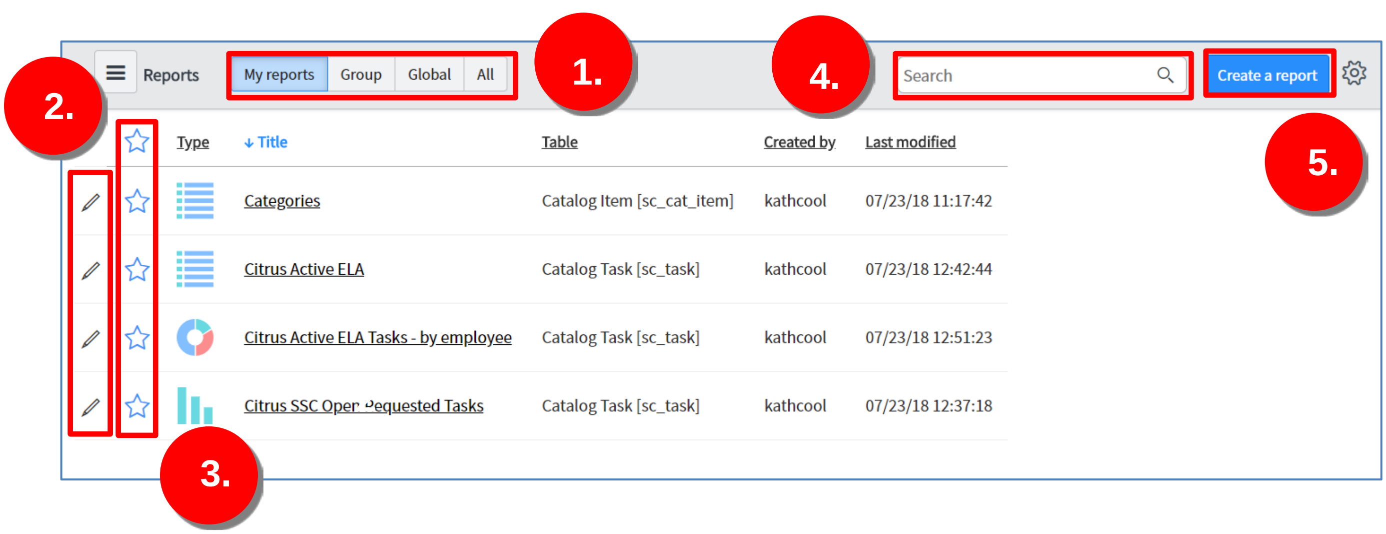
Getting Started

The Getting Started module provides Product Documentation to the ServiceNow Reporting features. Clicking on the module will direct you to the ServiceNow Product Documentation website. ServiceLink is a customization of the Kingston version of the ServiceNow application. The reporting functionality has not been heavily customized, so ServiceNow Product Documentation for Reporting can be used to supplement locally developed ServiceLink training materials.



View / Run

The View / Run module within the ServiceLink Reports application will take you to a list of reports you have created. If you have not yet created a report, this page will be blank. If you have created a report in the past and have saved the report, it will be listed on this page. Per the screenshot below, you will see the report type, where the data came from (Table column), who created the report (Created by column) and when the report was last modified (Last Modified column).



1. When clicking on the View / Run module, you will be taken to a page displaying all of your reports. This page is called “My Reports” (hence the blue highlighted tab at the top of the screen). Depending on whether or not reports have been shared with you, you may also have reports located under the

"Group" tab. These are reports that were not created by you, but have been shared with you by a member of your group. How to share reports will be discussed in greater details in the Distributing Reports section of this user guide. Depending on the access you were given you may or may not be able to edit the reports under the "Group" tab. Under the "Global" tab, you will find canned reports created by local ServiceLink admins. Again, depending on the report, you may or may not be able to edit these reports. Reports located under all three tabs (My reports, Group, and Global) are also located under the "All" tab.

2. Reports with a pencil icon located in front of the report type and title, can be edited. Clicking on the pencil icon will prompt the requested report to load in the "Create New" interface. Adjustments can be made to the data, type, configuration and/or style of the report. A new report can then be run and saved. The original report will not be deleted or changed. A new report will be created instead.

   Editing existing reports (instead of create a new report from scratch) is a great way to reuse existing reports to suit current or emerging needs. You can, for example, run a report using the same date, but configured differently, or using a different report type. Editing existing reports can also show you how other reports have been built and can help you build a new report that better matches your needs through reverse engineering.

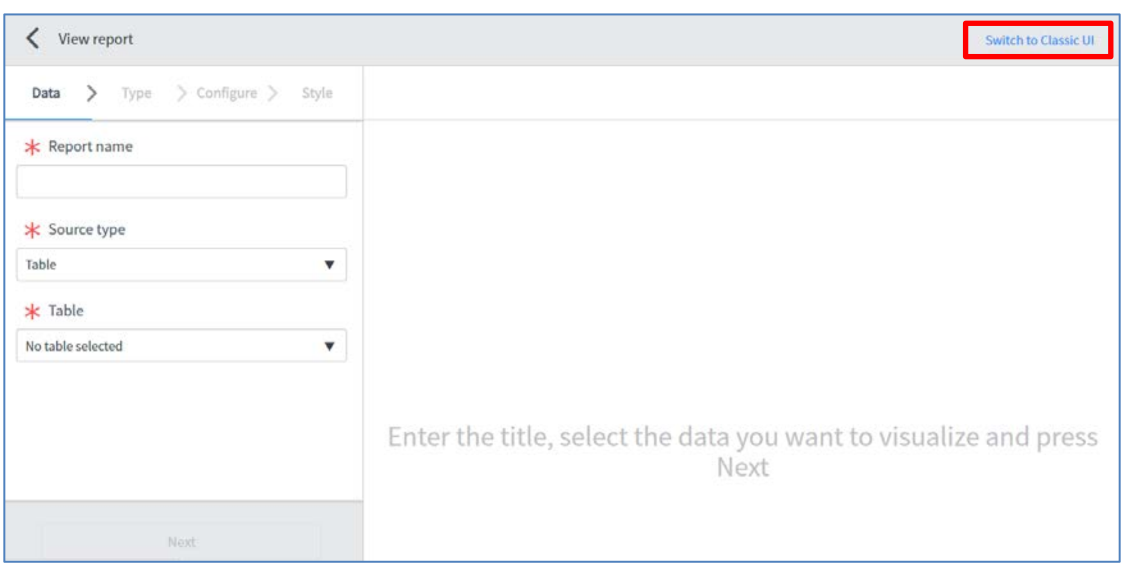
3. Reports that are particularly useful, or often used can be favorited by clicking on the star icon located next to the report type and title. Creating a favorite for certain reports can be helpful with the management of reports, especially when hundreds or more reports are displayed under the "My reports" and/or "Group" tabs.

4. In addition to favorites, you can use the search bar to search for specific reports using keywords. The integrated search function will only look at the report title, not the report data. One search will look at report titles within all four tabs (My reports, Group, Global, and All).

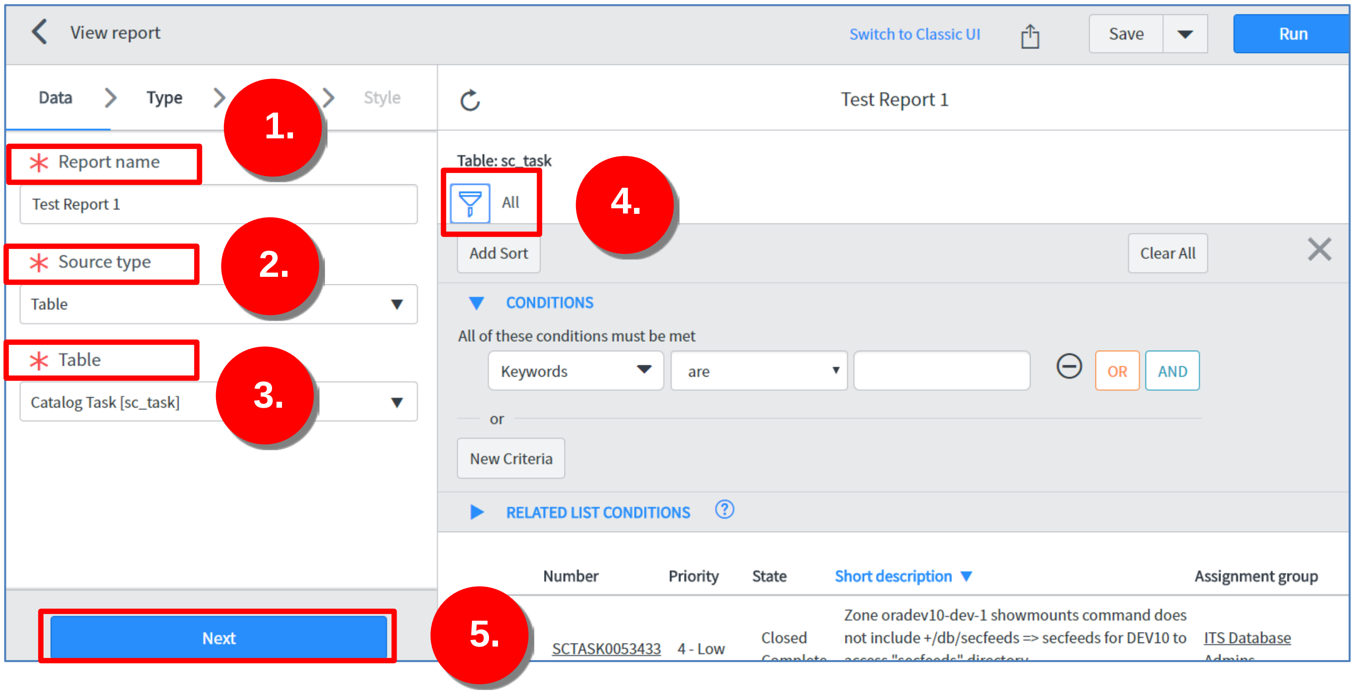
5. You can create a report from scratch within the View / Run module by clicking on the "Create a report" button. Clicking on this button will take you to the Create New interface. To create a new report from scratch, you can also navigate directly to the Create New application from the reports application.

Create New

When clicking on the "Create New" module under the Reporting application, you will be taken to what ServiceNow calls the "Report Designer" it is also known (within the interface) as the "New UI" (UI stands for User Interface). This interface will look like the screenshot below.



Report Data



1. All fields marked with a red asterisk are mandatory. Under the "Report Name" field, enter the name of your report.

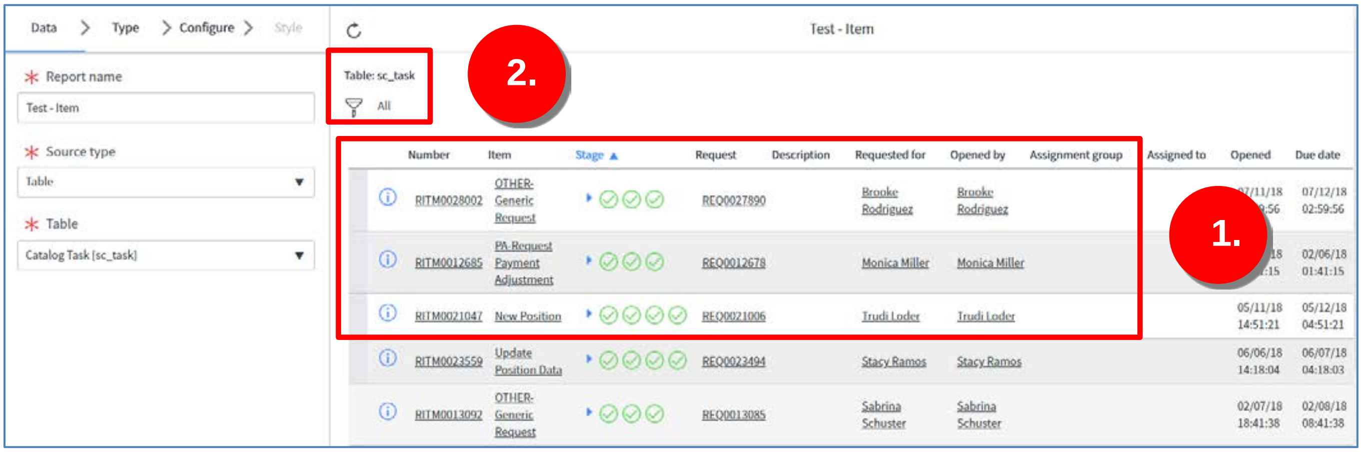
2. Source type lets you decide where the data of your report comes from. You can select from two options – Data Source and Table. Data Sources are pre-defined datasets that are often imported into the database. The Table Source type queries tables within the production environment. For most reporting purposes, you will want to select Table, although there is a data source that may be of interest to both Accountability Structures and Shared Services Centers.

3. Based on your choice of Source type, you will be asked to select either a Data Source or a Table from the dropdown. Keep in mind while scrolling through the lists of data sources and tables that we only use the Service Catalog application within ServiceLink to make AP/HR requests.
   - You selected "Data Source" as the Source type – only one Data Source may be helpful to you: **Requested items.Open (Requested Item).** This will pull ALL **open** RITMs in the ServiceLink catalog. It will not pull up requested items (RITMs) that are closed complete. You can either type the Data Source in the field or find it in the dropdown menu.
   - You selected "Table" as the Source type – There are three Tables that may be of interest to you as an Accountability Structure fulfiller or Shared Services Center fulfiller:
     - Request [sc_request] – this table will bring up all Requests (REQ), regardless of stage (the requests can be open or closed).
     - Requested item [sc_req_item] – this table will bring up all Items (RITM), regardless of stage (the items can be open or closed).
     - Catalog Task [sc_task] – this table will bring up all Tasks (SCTASK), regardless of stage (the tasks can be open or closed).

   You can either type the Table in the field or find it in the dropdown menu.

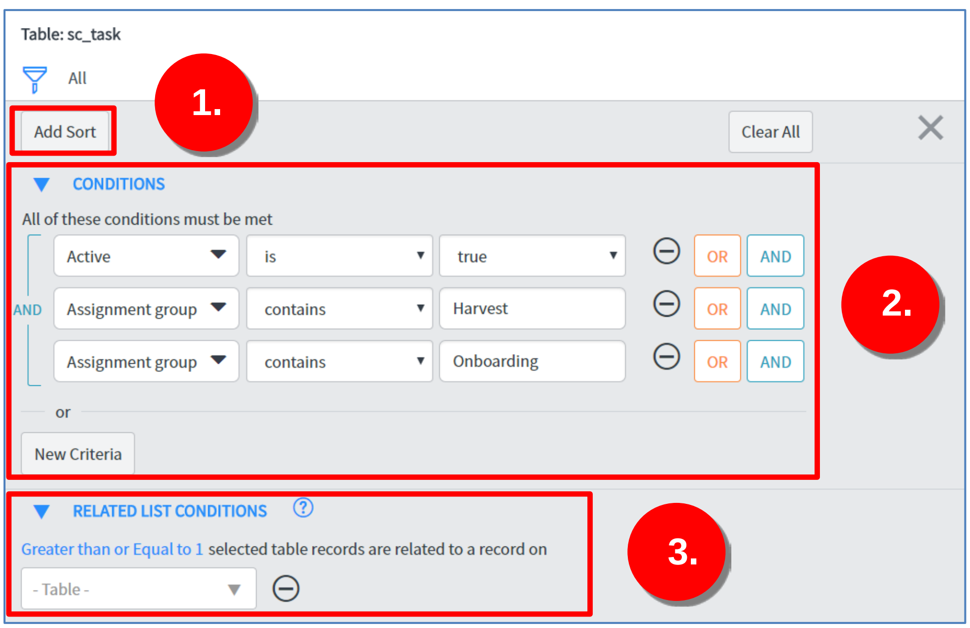
Refining Report Data

Once you have selected a Data Source or a Table, the requested data will populate in the reporting interface in list form, similar to the screenshot below (Table: sc_task was selected for this demo).

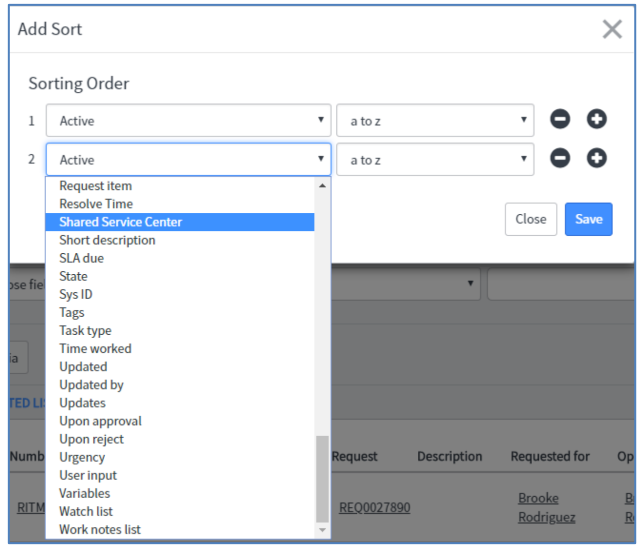


1. The data pulled from the Catalog Task table includes ALL data in the ServiceLink system for RITMs. More than likely, you will want to refine the data to have a meaningful report.

2. To refine the data, click on the icon to open the condition builder. This function is very similar to the condition building you use within lists to refine/filter data. A screenshot of the condition builder interface is provided below. This tool will allow you to sort your data, build conditions based to certain criteria, as well as specify related list conditions.



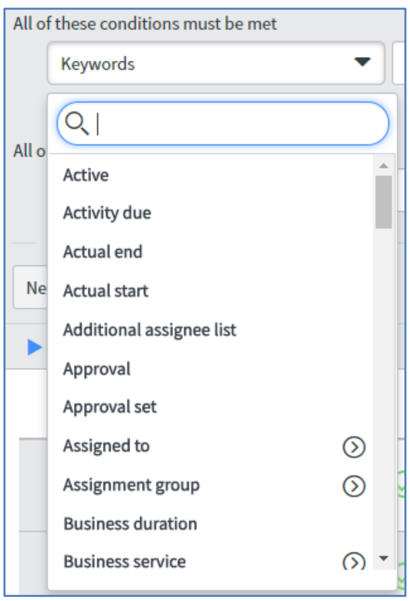
1. Clicking the “Add Sort” button will open up a dialog box which allows you to choose the sort order on any column in the selected list.

   You can select the column you want to sort by toggling on the down arrow and selecting a column header such as “Active,” “Shared Service Center,” “Employee Last Name,” etc. You can select one or more columns to sort by clicking on the plus sign icon. Clicking on the minus sign icon will delete the sort condition.

   Clicking the “Save” button will save and apply the sort conditions to the displayed table.

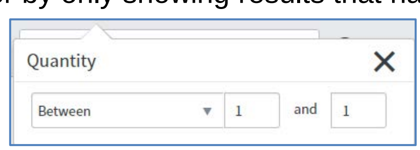
2. In addition to sorting the data, you can define conditions which you want the data to meet. For example, you may only want to see Tasks that are assigned to a specific Shared Services Center or a Department. You can also take it one step further and specify only certain types of request (such as New Hires and Transfers), or narrow it down to a specific employee or initiator.

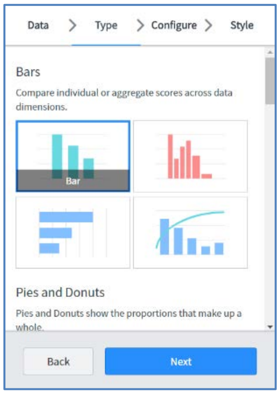
   To do this, select a keyword from the dropdown menu by toggling the downward arrow.
   If you are looking to build a report showing only tasks for a specific Shared Service Center, you would select the keyword “Shared Service Center” and the operator “is” (if you want only exact matches) or “contains” (if you are unsure how the data is displayed but know that it contains a specific word or letter). In the third field, you would enter the Shared Service Center you are interested in.

   If you want to further refine your data, you can add a condition by clicking on the “or” or “and” button. Clicking on the “or” button means that you are looking for data that will match either the first or the second condition. If you want both conditions to be met, you would select “and.” You can add as many conditions as you want as well as add additional criteria by clicking on the “New Criteria” button. This will generate an additional condition builder widget, allowing you to further refine the data displayed in the report.

3. The “Related List Conditions” allows you to refine your data further by only showing results that have the selected number of related records. You can, for example, specify that the returned results be greater than or equal to a certaining number, between two number, etc. Clicking on the hyperlinked quantity condition will pull up the a Quantity dialogue box, where you can specify the quantity of selected table records that are related to a record on a given Table. Once a Table has been selected from the dropdown menu, another condition builder will appear, allowing you to further refine your data. The conditions in the condition builder will depend on the Table selected. Not all tables listed in the dropdown menu may be helpful to Accountability Structure fulfiller and Shared Services Center fulfiller roles.

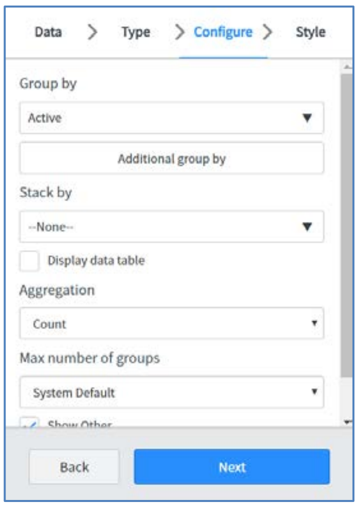
   

Report Type



Once you have selected your Data Source or Table and refined the data by either sorting and/or building conditions that the data must meet, you can select the type of visualization that would best suit your data needs. Different types of visualization lend themselves better to certain data and reporting usage. ServiceLink offers a wide array of report visualization types, one of which is sure to meet your data needs.

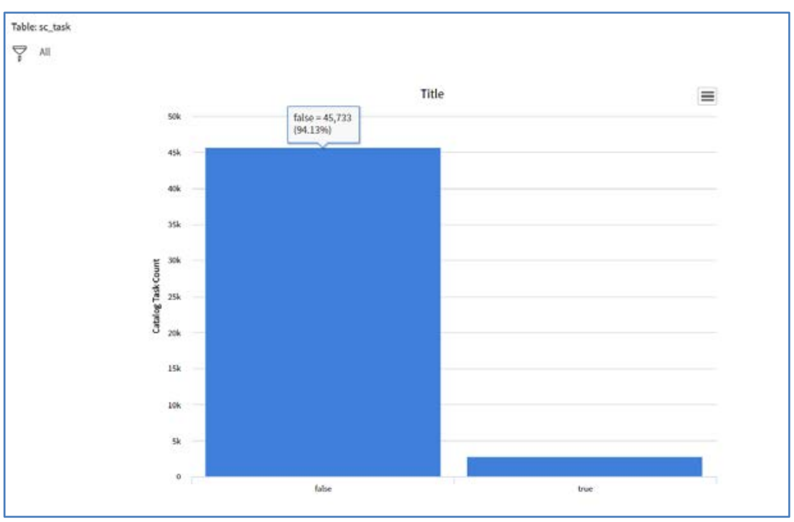
Configure Report



Once you have selected your report type and clicked the “Next” button, you will be taken to the “Configure” page. Configuration options will depend largely on the report type you have selected. If no report type was selected, your report will only display a list (no visualization). You will be able to configure the report by first choosing the columns of data you want to display. From there, you will be able to group them. All report types will allow you to group your data by data column.

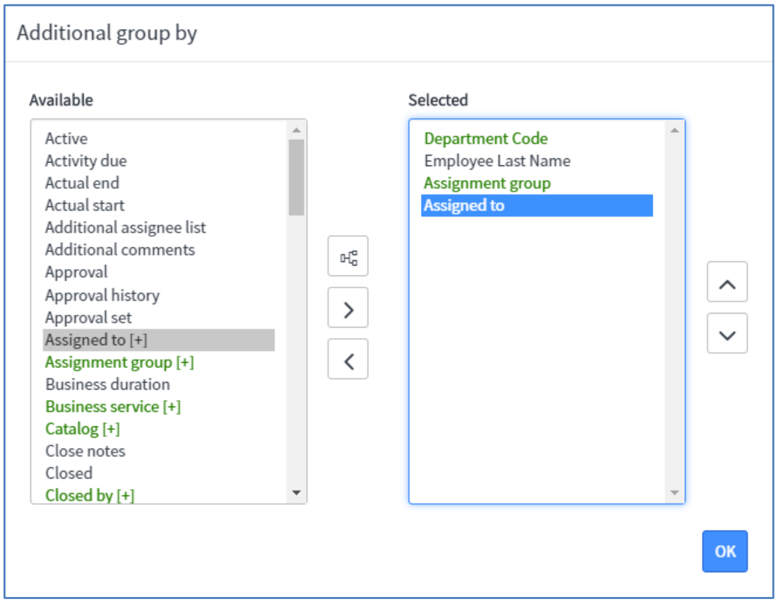
Group By

The Group By configuration allows you to group certain data points that are similar together. For example, if you are looking at Open and Closed tasks, you can group your data by “Active.” Doing so will show two data sets – one being tasks that mean the “Active” criteria (Tasks are open), and the other with tasks that do not meet the “Active” criteria (Tasks are closed), as shown in the screenshot below.



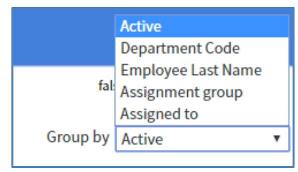
You may also want to group your data by assignment group, employee name, department code, etc.

Additional Group By



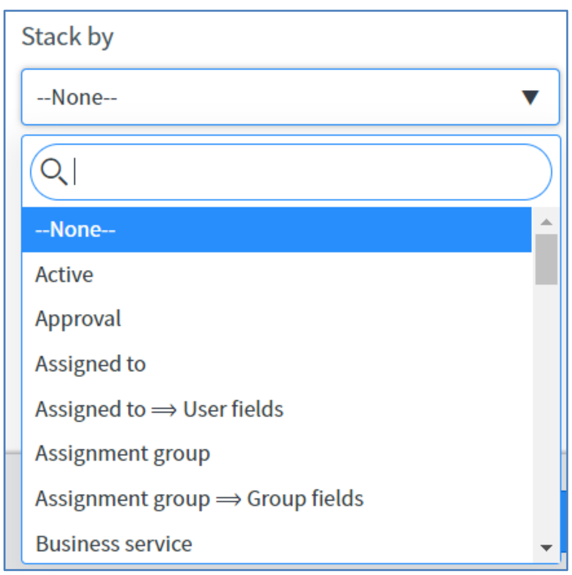
If you are wanting to see your data grouped by more than one criteria, you can do so by clicking on the "Additional group by" button. Clicking on the "Additional group by" button will open a dialogue box with all available criteria, as shown in the screenshot. You can select one or many criteria to move under the "Selected" box.

In this example, in addition to grouping the data by Active status, we are grouping it by Department Code, Employee Last Name, Assignment Group, and Assigned To. To confirm your choices, click the "Ok" button.



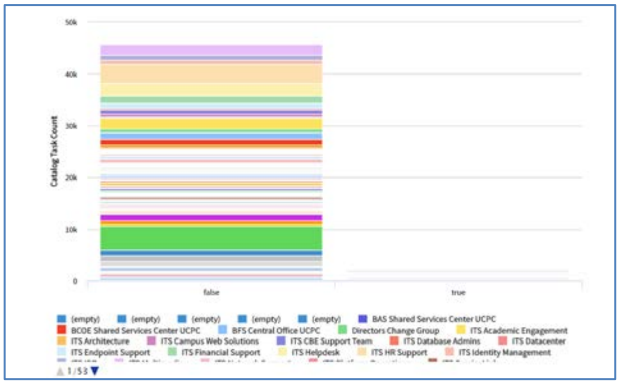
Once you run the report, this configuration will allow you to toggle between different data groupings. You will see one visualization of your data (such as grouped by Active status), and will be able to select different group by options (such as by Department Code, Employee Name, etc.) at the click of a button.

Track By / Stack By

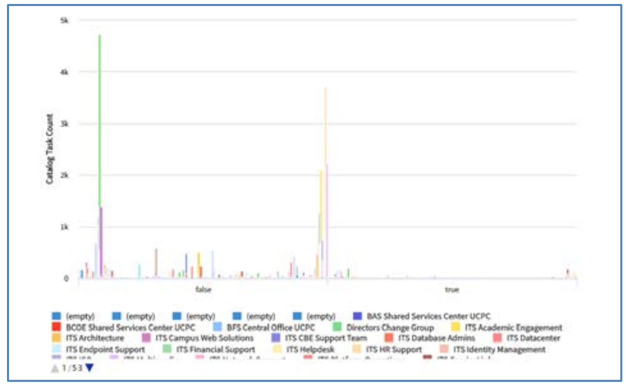


Another way to configure your data is by using the Trend by or Stack by feature. Which one is available to you will depend on the report type you chose (Trend by being used more with line type reports and Stack by with bar type reports). This will allow you to drill down even further in the data set. For example, if you are grouping the data by Active status of the ticket, you may want to further drill down and stack the data (or trend by) by Assignment group. This will show you the number of tasks that are open or closed based on the Assignment group.

You can then choose to display this data using Stacked bars (the outcome will be one striated bar) or Grouped bars (many small bars will be displayed for each data set). You can also click to display the data table.



Stacked bars



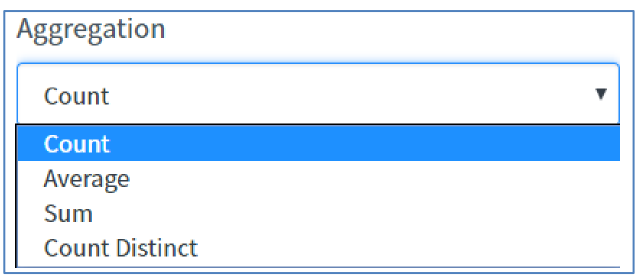
Grouped bars

Group by Active ▾ Stacked by Assignment group ▾

Active Totals		Catalog Task Count Totals	Percentage of Count
false Total		**45,755**	**94.16%**
true Total		**2,836**	**5.84%**
Active	Assignment group	Catalog Task Count	Percentage of Count
	(empty)	166	0.36%
	3e79b24237688300a2e983dcb3990ed2	324	0.71%
	928eeca437558700de3d96d543990ee4	79	0.17%
	93862ca037558700de3d96d543990e9e	205	0.45%

Display data table

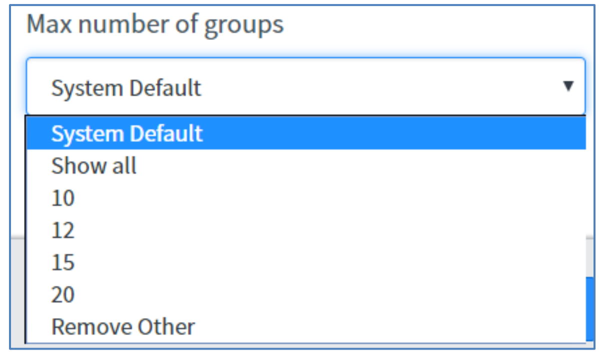
Aggregation



You can also select how you want your data to be aggregated. You can choose from Count, Average, Sum, or Count Distinct.

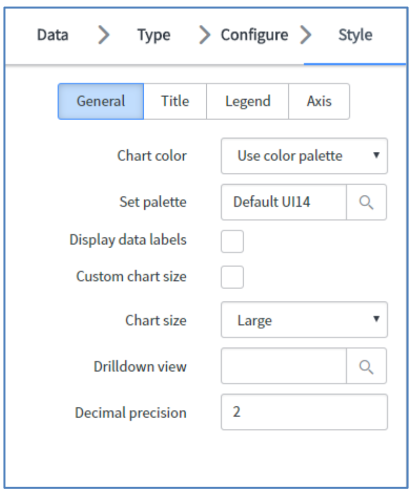
Count Distinct allows you to aggregate your data by counting distinct data points (such as Assigned to, Assignment group, etc.).

Max Number of Groups



You can also choose to limit the number of groups to display in the report by using the “Max number of groups” feature. Groups with the highest value are included first. Any excluded groups are combined into a single group names “other.” If you are limiting to number of groups, you can click the “Show Other” box. Using this feature will include the group Other, which contains data for all the groups that exceed the number specified in the Max number of groups options.

Style



Once you have configured your report and clicked on the “Next” button, you can apply different styles to your visualization. Many style options are available, including for different parts of your visualization. There are four (4) tabs (General, Title, Legend, and Axis), all with different style options. The four style tabs are outlined below:

- **General** – The “General” tab provides style options for the overall look and feel of your visualization. You can, for example, choose the chart color, set the palette, and choose to display data labels, customize the chart size, and select the decimal precision of the displayed data.
- **Title** – The “Title” tab provides style options for the visualization title. You can choose where to display the chart title, select the size of the chart title, its colors, and position (including horizontal and vertical alignment).
- **Legend** – The “Legend” tab provides style options for the legend. You can choose to have a legend (default) or not as well as choose its horizontal and vertical alignment. You can also opt to select a legend border and/or left align the legend text.
- **Axis** – The “Axis” tab provides style options for both the X and the Y axis. Each can be styled individually by selecting the appropriate tab at the top of the screen (X axis or Y axis). Both can be given a title, which can then be styled using different style fonts and bolded.

For Advanced Options, consult the full ServiceLink Reports & Dashboards User Guide.