



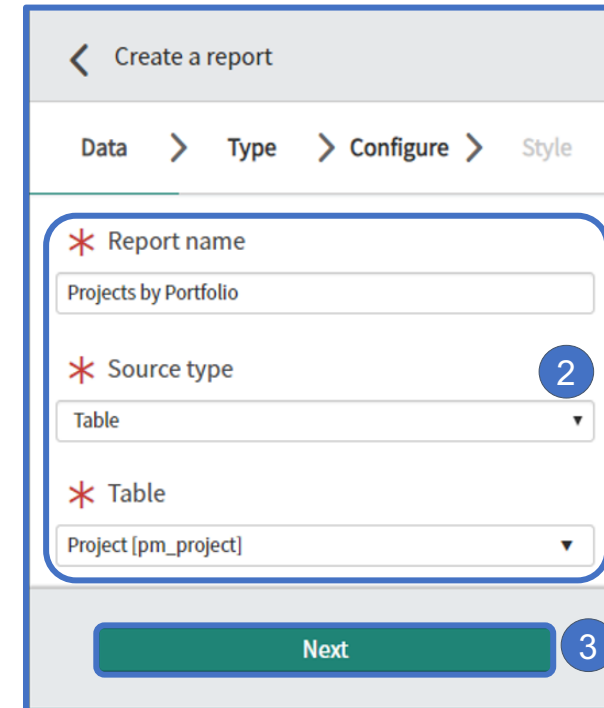
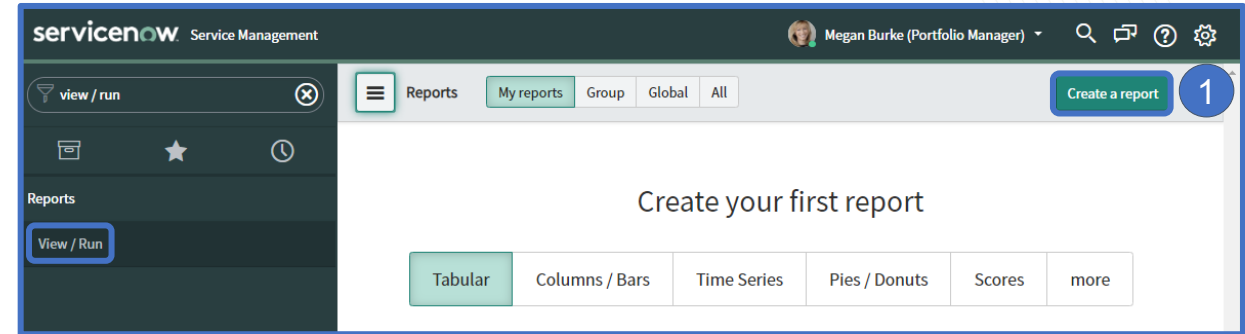
# How to Create a Report Using the Report Builder

Quick Reference Guide

# How to Create a Report

Reports are visualizations of your data that you can share with users as is, on dashboards, service portals, and even use on your personal homepages. You can also export them to PDF and send to others, within and outside of ServiceNow, via email.

1. To create a new report, type **View / Run** in the left hand navigation, then click **Create a report**.
2. On the **Data** page, enter a Report Name, Source type (Table), and then specify a table. Hint: Look in the URL of the page of the data you're trying to view in a report to know what table the data resides.
3. Click the **Next** button.

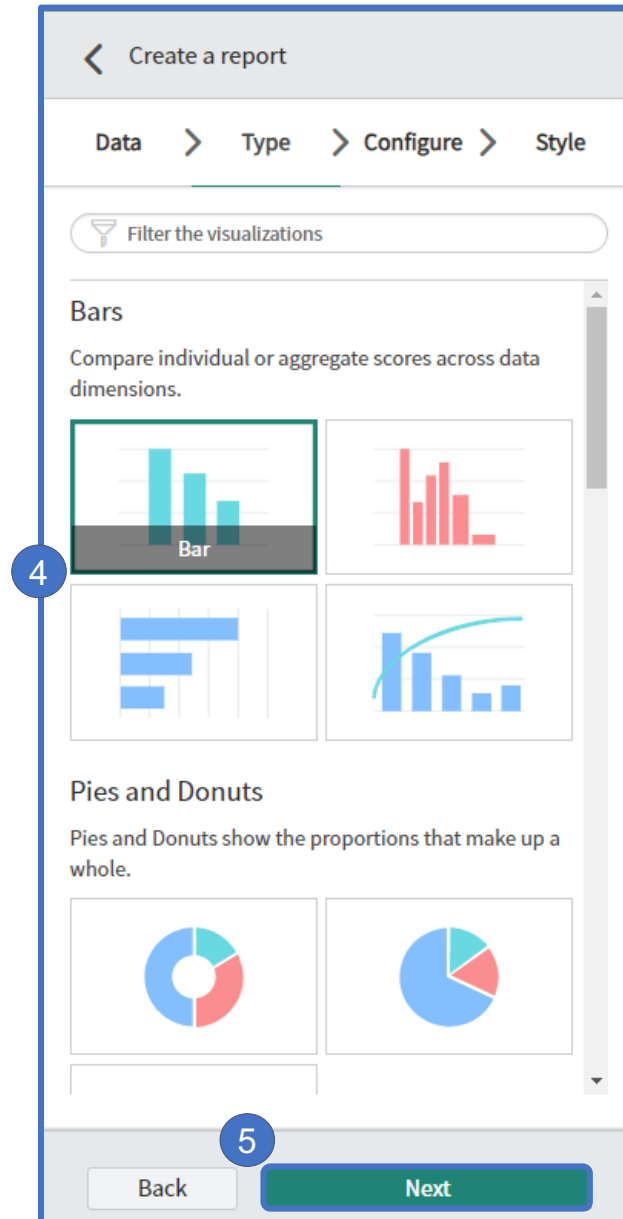
This screenshot shows the 'Create a report' wizard in the 'Data' step. The breadcrumb navigation at the top reads '< Create a report' and 'Data > Type > Configure > Style'. The form contains three required fields, each marked with a red asterisk: 'Report name' with the value 'Projects by Portfolio', 'Source type' with a dropdown menu showing 'Table' (marked with a blue circle '2'), and 'Table' with a dropdown menu showing 'Project [pm\_project]'. At the bottom, there is a green 'Next' button (marked with a blue circle '3') and a blue circle '1' in the top right corner.

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4. On the **Type** page, select the type of report you'd like to create such as:

- a. Bar Charts
- b. Pie Charts
- c. Time Based
- d. Pivot Tables
- e. Funnels and more

5. Click the **Next** button.



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6. On the **Configure** page, first select the **Group by**, in this example, Portfolio is selected. Adding “Additional group by” options adds a drop down below the graph.
7. Select a **Stack by** if desired, here Business service is selected.
8. Aggregation can be **Count**, **Average**, **Sum**, etc.
10. Click the **Next** button.

Note: the options to be configured in this pane will depend on the type of report chosen in the previous pane.

The screenshot shows the 'Create a report' configuration interface. At the top, a navigation bar includes a back arrow, the title 'Create a report', and tabs for 'Data', 'Type', 'Configure' (which is active and highlighted with a blue box and a blue circle containing the number 6), and 'Style'. Below the tabs, the 'Group by' section has a dropdown menu with 'Portfolio' selected (highlighted with a blue box and a blue circle containing the number 6). Below this is an 'Additional group by' input field. The 'Stack by' section has a dropdown menu with 'Business service' selected (highlighted with a blue box and a blue circle containing the number 7). Below this are two radio buttons: 'Stacked bars' (selected with a green dot) and 'Grouped bars' (unselected). There is also an unchecked checkbox for 'Display data table'. The 'Aggregation' section has a dropdown menu with 'Count' selected (highlighted with a blue box and a blue circle containing the number 8). Below this is a 'Max number of groups' dropdown menu with 'System Default' selected. At the bottom, there is a checked checkbox for 'Show Other'. At the very bottom of the pane, there are two buttons: 'Back' and 'Next' (highlighted with a blue box and a blue circle containing the number 10).

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11. On the **Style** page, you can select colors, chart size, decimal precision, and drilldown details.
12. Click the **Filter** icon to add filter conditions as necessary to the report.
13. Click the **Save** button then click the **Run** button to see the results of your report.
14. Click the **Filter** icon to add filter conditions as necessary to the report.
15. Click the **Share** button in order to share the report with other groups or users.

11

12

Table: Project [pm\_project]

All

CONDITIONS

All of these conditions must be met

-- choose field --

OR AND

New Criteria

RELATED LIST CONDITIONS

