Your Presenter

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Corrine has administered CA Service Management since its implementation at MSU in 2008 and has built reports for it using multiple different tools over the years.
Participating in Session

Please use the Q&A feature to ask questions, view questions other participants have asked, and see the answers to all questions.
Agenda

Lesson 1: Introduction to Insights
  • System Requirements (VPN)
  • How to Access

Lesson 2: Brief Overview
  • How to Navigate Insights

Lesson 3: Outstanding Tickets Dashboard
  • How to Access and Use
  • How to Customize

Lesson 4: Ad Hoc Views & Reports
  • How to Build
  • How to Schedule
  • How to Share with Other Users
INTRODUCTION TO INSIGHTS
Insights

• Insights is a vendor-customized version of the TIBCO Jaspersoft JasperReports application that is used within CA Service Management.

• Insights enables decision makers with self-service analysis capability and provides the ability to save the information as a report, display it as a dashboard, and share it in different formats.
Insights System Requirements

• To use Insights, you must be connected to the MSU VPN. For additional information about accessing the MSU VPN, please visit: https://itservicedesk.msu.edu/KB/419387

• Insights is supported on most modern browsers
  • Mozilla Firefox (version 77+)
  • Google Chrome (version 83+)
  • Microsoft Edge (version 44.+)
  • Apple Safari (version 11.1+ on MacOSX)
  • Apple iPad iOS Safari (version 7.0+)
How to Access Insights

1. Log into [https://itservicedesk.msu.edu](https://itservicedesk.msu.edu) with your MSU NetID and password.

2. All analyst roles should have a tab labeled “Insights” in their view. Select the Insights tab.

3. Click the Launch Insights button to open Insights in a new tab.
How to Access Insights

• Please note that you cannot log into Insights or https://reporting.itservicedesk.msu.edu directly.

• If your session has timed out, navigate back to IT Service Desk https://itservicedesk.msu.edu and use the Launch Insights button from the Insights tab again.
BRIEF OVERVIEW
How to Navigate Insights: Home Screen

- Dashboards, Ad-Hoc Views and Reports accessed recently
- Visualization Shortcuts (View or create specific types of visualizations)
- TIBCO Jaspersoft JasperReports Videos (may reference features not available in Insights)
How to Navigate Insights: Menu

• **Home (House Icon):** Return to the main home page

• **Library:** Displays a full list of all items you have access to, including out of the box items, organization wide items, items shared with you, and items from your personal user folder
  • This list can be searched, but not sorted or filtered
How to Navigate Insights: View Menu

• **Search Results:** Items in a list view that can be filtered by type, access date, schedule status, and search term

• **Repository:** Displays items in a folder layout
  - Allows for copying items without opening or copying whole folders

• **Schedules:** View or Update scheduled jobs

• **Messages:** Displays messages from scheduled jobs
How to Navigate Insights: Create Menu

• **Ad Hoc View:** Visualization for reporting an analysis
  • Fields included and visualization type can be adjusted and filtered as needed, as well as creating calculated fields and measures

• **Report:** Multi-page reports based on ad hoc views
  • Filters can be applied as needed, but the fields and displays are static

• **Dashboard:** Layout of multiple visualizations on one screen
How to Navigate Insights: Shortcuts

• **Visualization Shortcut**: Either displays a list of all items with a specific type or opens the creation screen for that type depending on the area clicked.
OUTSTANDING TICKETS DASHBOARD
How to Access the Dashboard

• Can be accessed via the Dashboards shortcut, Library menu, View > Repository menu, or search box
  • To make a copy for customization, you should use the View > Repository option, since this allows you to copy the whole folder at once
• Within the Repository, follow these breadcrumbs:
  casm_insights > MSU > dashboards > Outstanding Tickets Dashboard
How to Use the Dashboard
How to Use the Dashboard: Filters

• Selecting options and clicking the Apply button will immediately apply the selected filter and update the displayed information.
How to Use the Dashboard: Dashlets

- Change the visualization (e.g., change a pie chart to a column chart or table)
- Hovering over a chart section will display additional information; when drill-downs are enabled, clicking will open the drill-down report
- Clicking on item in the legend will hide that item in the chart and grey out the entry in the legend; clicking again will restore it
- Options to refresh the dashlet and to maximize the dashlet
How to Customize the Dashboard

• Copy the Outstanding Tickets Dashboard folder from `casm_insights > MSU > dashboards` to your Users folder, which is located `casm_insights > Users > [MSU NetID]`
  • Right-click on the original folder to get the Copy option
  • Navigate to your Users folder and right-click to get the Paste option

• **Please Note:** You can only save items to your Users folder (`casm_insights > Users > [MSU NetID]`)
How to Customize the Dashboard

• In the copied dashboard folder, you can edit the ad hoc views to customize:
  • Default filters applied to ad hoc views (e.g. dashboard automatically only shows information related to MSU IT Enterprise Services)
  • Fields that display in the drill-down reports (e.g. add Building Location to Outstanding Requests, remove Days Open)
• Clicking on an ad hoc view or selecting the view and choosing the Open option will open it in Design mode and allow you to make changes
How to Customize the Dashboard

• In the copied dashboard folder, you can edit the dashboard to customize:
  • Visualization types in dashboard (e.g. change a pie chart to a column chart or a tree map)
  • Dashlets appearing in dashboard (e.g. remove dashlets that are not useful and add or create ones that better fit your needs)
• Clicking on a dashboard or right-clicking and choosing **Open in Designer...** or selecting the dashboard and choosing the Open option will open it in Editing mode and allow you to make changes
How to Customize the Dashboard

- Create new content as needed (fewer features than normal ad hoc)
- Switch Existing Content between List View and Folder View
- Search Existing Content by name
- Choose Existing Content to create a new dashboard
- Choose Filters from dashboard to add to dashboard filters

- Open Parameter: Mapping window (needed for filters and drill-downs)
- Dashboard Properties: colors, size, refresh rate, etc.
- Modify dashboard properties: options, drill-down, etc., or delete dashboard
- Drag borders to resize dashboards
- Mode Toggle (switch between Editing and Viewing)
Ad Hoc Views & Reports

• **Ad Hoc Views**: Visualizations for basic reporting and analysis
  • Allows you to select the relevant domain (dataset/view) and display as is appropriate
  • Reports can be automatically created from within the Ad Hoc Editor using the option from the **Save** menu

• **Reports**: Multi-page reports that can be filtered and exported
  • Requires a base ad hoc view to create and will use the content, layout and filters from the ad hoc view
How to Build an Ad Hoc View

• Click Create from shortcut or use Create > Ad Hoc View menu option
• In the Select Data window, select a domain
  • Use the domains with MSU in the name to the customized data sets with MSU custom fields and calculations
    • You can type MSU in the search field to filter the list
    • Ticket Management – MSU includes information from all ticket types (request/incident/problem), while others only include the one named type (e.g. Request Management – MSU contains only requests and their related information)
How to Build an Ad Hoc View: Data Chooser

• On the Fields option, select which fields you want available to your ad hoc view
  • Field can be moved by set (folder) or individually
  • Select the item in the Source list and click the right arrow to move it to the Selected Fields list
How to Build an Ad Hoc View: Data Chooser

• **Optional:** On the Pre-Filters screen, select a field you would like to filter on and double-click or drag it to the filters pane
  • If you identify a filter as **Locked**, then the filter cannot be changed - only removed from the ad hoc view
  • Click **OK** to save and apply your pre-filter
  • Add more pre-filters as needed
How to Build an Ad Hoc View: Data Chooser

• **Optional:** On the Display screen, you can override the labels for the fields from the domain
  
  • This can also be done within the ad hoc editor
How to Build an Ad Hoc View: Data Chooser Considerations

• Adding a Pre-Filter will allow you to set a filter before starting to generate the ad hoc, which is helpful when sharing reports with others
  • Relative dates cannot be applied to a pre-filter, but can be used when applying filters to an ad hoc view

• It is best practices to avoid selecting more data than you need to avoid overly large queries that could cause system degradation

• Please Note: Once you have clicked the final OK button and moved to the Ad Hoc Editor, you cannot change your domain after you proceed without recreating the ad hoc view
How to Build an Ad Hoc View: Filters

• If you add filters to your ad hoc view before you add items, the data will already be filtered before the visualization starts to render, which will speed up the querying of the data and loading of the visualization, as well as reduce the potential system impact.

• Two ways to create a filter:
  • Right-click on the field and choose Create Filter
  • Drag field to the Filters Pane on the right side of the screen
    • The Filters Pane may be collapsed, but it will expand when you drop a field in it
How to Build an Ad Hoc View: Filters

• After adding a field to the filter pane, you can click on the downward arrow to choose your operator
  • Available operators will change based on the type of field you have selected
  • Some operators require two values to be provided
How to Build an Ad Hoc View: Relative Dates

• Relative dates allow you to create a view where the dates included change based on the date the view is opened

• Available relative dates are
  • **DAY:** Day from 12:00:00 AM until 11:59:59 PM
  • **WEEK:** Monday through Sunday
  • **MONTH:** First of day month until last day of month
  • **QUARTER:** Start of quarter (January, April, July, October) until end of quarter (March, June, September, December)
  • **SEMI:** Start of semi-year (January or July) until of semi-year (June or December)
  • **YEAR:** Start of calendar year (January 1st) until end (December 31st)
How to Build an Ad Hoc View: Relative Dates

• You can use a relative date with a + or – value to adjust the range.

• Relative Date Filter Examples:
  • A filter on Open Date that is set using the “is between” operator and values of \texttt{SEMI-1} and \texttt{SEMI} will include all tickets opened during the current fiscal year when run between January and June since it will include everything from the start of the last semi-year (July of the previous year) until the end of the current semi-year (June of the current year).
How to Build an Ad Hoc View: Relative Dates

- Relative Date Filter Examples:
  - A filter on Resolve Date that is set using the “is on or after” operator and value of YEAR will include all tickets resolved during the current year to date.
  - A filter on Open Date that is set using the “is between” operator and the values of MONTH-1 and MONTH-1 will include all tickets opened during the previous month (i.e. running the report in May 2022, will provide tickets for April 2022).
How to Build an Ad Hoc View: Type

• The visualization type can be changed at any point using the Select Visualization Type option
  • Some visualization types have specific requirements regarding the number of fields and measures in columns and/or rows
How to Build an Ad Hoc View: Fields vs Measures

- Measures are aggregate values (e.g. count, sum, average, etc.) that can be summarized at different levels
  - Identified with green icons
- Fields are all non-measure items (e.g. ticket number, status, affected end user)
  - Identified with blue icons
- Items can be switched between fields and measures using the **Use as** option in the right-click menu
  - Fields used as measures will use be count values
How to Build an Ad Hoc View: Adding Items

• Fields and measures can be added to an ad hoc view by any of the following methods:
  • Dragging the field or measure to the appropriate report section in the header
  • Dragging the field or measure on to the ad hoc view space
  • Right-clicking the field or measure and choosing either “Add to Column” or “Add to Row”
  • Double clicking the field or measure (the visualization type will determine where it is added)
How to Build an Ad Hoc View: Creating Calculated Fields/Measures

- Calculated fields and measures are new items computed from other items
  - Clicking on the three dots in the item header will display the option to **Create a Calculated Field...** or **Create a Calculated Measure...**
How to Build an Ad Hoc View: Creating Calculated Fields/Measures

- Within the **Calculated Field/Measure** window:
  - Clicking on a function will display the **Function Description**
  - Double-clicking on a function will add it to the **Formula** box
  - Double-clicking on a field or measure will add it to the **Formula** box
  - Icons indicate the item type (e.g. clock = date field, letters = text field, etc.)
How to Build an Ad Hoc View: Grouping

- Some item types allow for grouping options
  - Dates can be grouped by year, quarter, month, day, etc

- Some visualization types have an option to specify fields to group to data
  - The Table visualization changes the Rows option to Groups in the header and will create a header to indicate each group
How to Build an Ad Hoc View: Data Format

• Some items can have their data format adjusted
  • Numbers can be configured to display with commas or dollar signs
  • Dates can be configured to display without time values or in short format
How to Build an Ad Hoc View: Crosstabs

- Crosstab visualizations have some unique options
  - Right click on a row header to opt to expand members or remove summaries
    - Or click the plus or minus sign next to header to expand or collapse
  - Click on an item value in a heading to focus or exclude the value
  - Clicking on detail values in a crosstab will automatically create a drill-down of the items included in the value
How to Build an Ad Hoc View: Saving

• **Save Ad Hoc View:** This option will save your current Ad Hoc View and if you have not already saved it, will ask you to specify a name and location
  • You may need to navigate to your Users folder, which is located
    `casm_insights > Users > [MSU NetID]`

• **Save Ad Hoc View As:** This option will allow you to save your current Ad Hoc View under a different name
  • This option is useful if you are creating a drill-down version of an existing ad hoc view for a dashboard
How to Build an Ad Hoc View: Saving

• **Save Ad Hoc View and Create Report:** This option will save your current Ad Hoc View and create a report to be saved as well
  - You will need to specify a location for both ad hoc view and report to save
    - You may need to navigate to your Users folder, which is located `casm_insights > Users > [MSU NetID]`
  - Report will default to be named the name of the ad hoc view with the word **Report** at the end, but can be updated
How to Build a Report

- Click Create from shortcut or use Create > Ad Hoc View menu option
- In the Create Report window, select an ad hoc view to build the report from
  - There are currently no Custom Report Templates available
- Click OK to proceed
- Use the save menu to save the report
How to Schedule

- When in a report, you can use the clock icon in the menu bar to schedule.

- From the Library, Repository, or Search Results view, right-click on the report to locate the Schedule... option.
How to Schedule: Create Schedule

• From the Scheduled Jobs window, click Create Schedule to create a new schedule

• To create a one-time report instance, you can use the Run Now option to run the report once
How to Schedule: Create Schedule

• On the **Schedule** tab, you can indicate when the schedule will start and if the schedule will recur

• **Recurrence Types**
  - **Simple**: Regular intervals based on weeks, days, or other time frame
  - **Calendar**: Regular interval based on calendar values (e.g. first of the month, second Thursday of the month, even-numbered months, etc.)
How to Schedule: Create Schedule

• On the **Parameters** tab, you can indicate specific values for the filters to use.

• On the **Output Options** tab, you can indicate the file type and if the instances should overwrite the previous files or use sequential file names
  • If you choose not to overwrite the files, you will need to periodically clean up old copies
How to Schedule: Create Schedule

- On the **Notifications** tab, you can indicate if you would like to receive an email when the job has completed
  - You have the option to attach the report files as attachments to the email
  - If you are sending the report file via email, you may want to choose the overwrite option on the **Output Options** tab
How to Share with Others

• From the **Repository** view, right click on the item to share and choose the **Permissions**... option to open the **Permissions** window.

• From the **Permissions** window, click on **USER** to switch to the user list.
How to Share with Others

- Type the NetID of the user you would like to share with
- Select the appropriate access level from the drop down
- Click **Apply** and repeat for any other users that you would like to grant access to
QUESTION & ANSWER TIME
Additional Assistance with Insights

- Training and Help Resources:
  - https://help.jaspersoft.com/
  - https://community.jaspersoft.com/wiki/jasperreports-server-how-videos-playlist

- CA Insights Teams Channel:
  - https://bit.ly/3kKj0Cl

- Service Management Office:
  - Create a request with the CA Reporting CI and ITS Configuration Management group