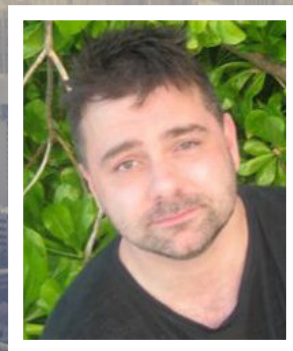


ITIL Report Distribution

(Part 2)



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Introduction

In part 2 of this whitepaper we will continue to look at the remaining levels of the 'Portion Pyramid' in detail, covering the reporting types and styles to provide a minimum acceptable level of coverage to their respective audience.

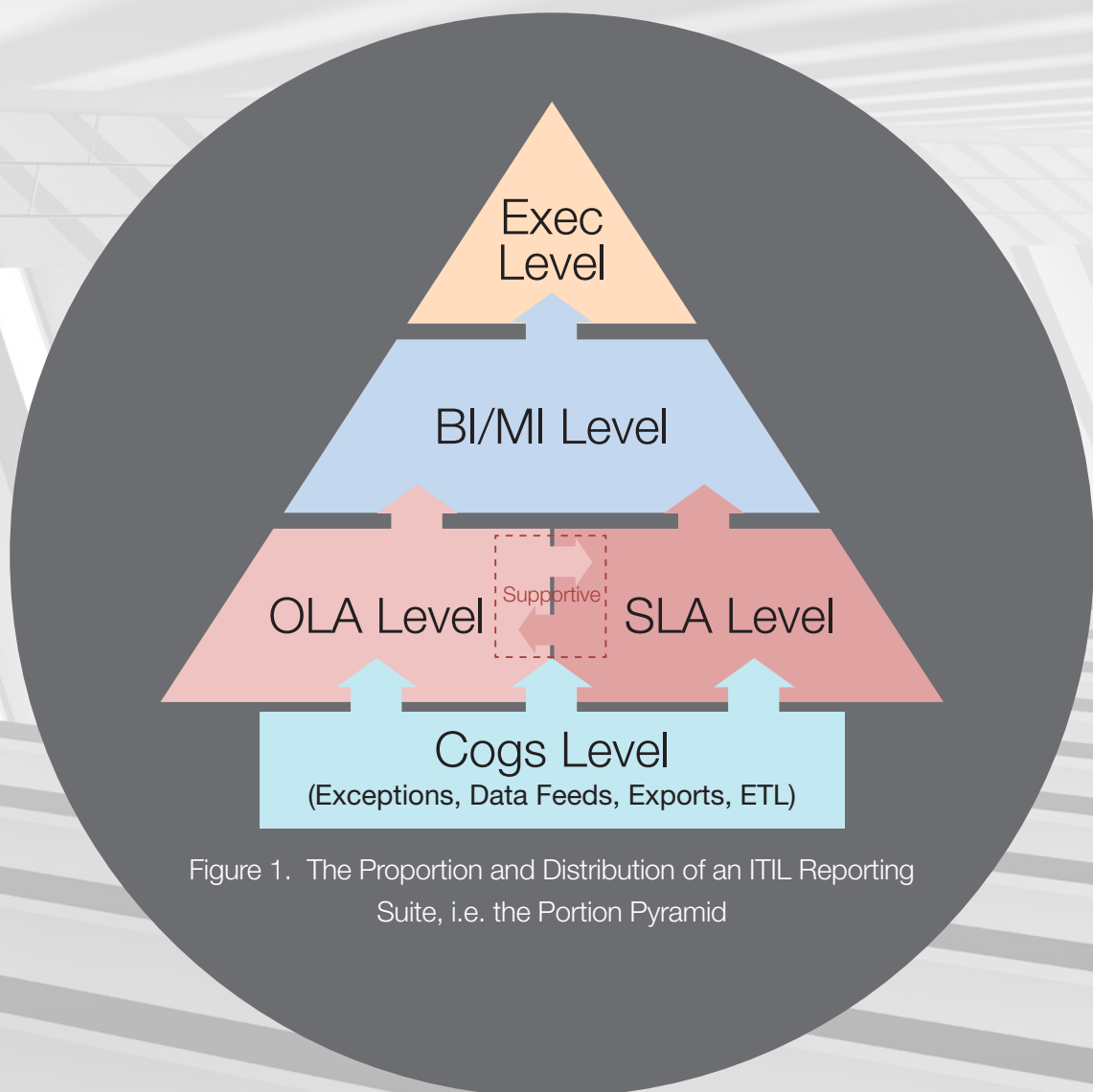


Figure 1. The Proportion and Distribution of an ITIL Reporting Suite, i.e. the Portion Pyramid

The OLA and SLA Levels

Operational Level Agreements measure the true efficiency of the service support, and as such are the ground floor upon which to build the reporting suite. OLAs measure the time taken to resolve each Task that makes up the support for a service and can span numerous Resolver Groups. Get the OLAs on target and the rest of ITIL performance falls into place.

Being on the ground floor means one thing in practice:

- 1 This level should be built as the first true reporting level, upon which all the other levels are based. In the real world, implementing OLA reporting first enables Resolver Groups and their Line Manager to settle into a documented process and test the accuracy of the OLAs/and related KPIs. Resolver Groups are the ITIL coal face, letting the team measure their own OLAs before judging the success of the overall output (SLAs).



Figure 2. The Level Focused on KPIs

SLA and OLA Report Types

As OLAs are attached to the individual Tasks required to meet an SLA, the core reporting does not look that different to the SLA reporting covered in the next section. But rather than displaying the time taken to Respond and Resolve, there is a single metric focused on the elapsed time taken for each Task. Depending on how the Tasks have been configured; responding to receiving a Ticket in the Resolver Groups queue can often be a separate Task.

This leads to the reports being grouped by Task rather than Priority. Although reporting on Tasks grouped by Priority can be enlightening in regards to how urgency can impact productivity, it does not have enough value to justify a scheduled report unless wider problems with meeting SLAs become persistent.

This is pretty much it for mainstay OLA reporting. There can be value in looking at Ticket reallocation and how that impacts OLA based KPIs, but this is more of a management report and so is covered in the next section.

SLA Reports tend to be the most restricted and boring out of all the Portion Pyramid Levels, especially from a consultant's point of view, as the requirements do not vary much from one organization to another.

Charts and graphs can be used to add some flare, but the core of the report will always be the same few fields and metrics.

Incident Throughput									
Priority	Bought Forward	Open	Resolved	Resolved in SLA	Resolved in SLA(%)	Closed	Closed in SLA	Closed in SLA(%)	Carried Forward
1 - Priority One	2	10	11	7	63.64	11	6	54.55	1
2 - High	3	38	40	36	90.00	40	10	25.00	1
3 - Medium	2	105	105	83	79.05	104	104	100.00	2
4 - Low	1	24	23	23	100.00	22	21	95.45	2
Monthly Total	8	177	179	149	83.24	177	141	79.66	6

Figure 3. Typical SLA Reporting.

With the audience being users who are reliant on the Service in question, their primary interest is in the Response and Resolution SLAs and KPIs.

So those metrics, supported by a count of new Tickets, old Tickets and open Tickets form the subject of the report, it just requires grouping by Priority for context.

The time period reported on may vary somewhat and although monthly is most common, weekly reports are often required. More mature ITIL systems tend to settle on four-weekly reporting as it promotes a more even and comparable reporting period.



OLA and SLA Audience

SLAs and OLAs are different beasts and yet have a large crossover of audience types as well as reporting content.

Primarily, OLAs are intended for the Resolver Groups responsible for a specific service(s) and are focused as such. Stakeholders never need to see an OLA based report...unless they are also a Resolver Group, and even then, they should receive OLA reports for their work and separate SLA reports for the services they consume.

While the above sounds very discrete, there is a real value to Resolver Groups also having visibility of the SLA reporting based on their supported Services. This provides the same view of their Service Support that their Stakeholders are experiencing and is especially useful if numerous Resolver Groups are involved in supporting one Service. In these scenarios, knowing the overall quality being experienced by Stakeholders (SLAs!) can be lost to an individual Resolver Group.

And the 'Supportive'

I have included a deliberate fuzzy area in the Portion Pyramid that covers both SLA and OLA metrics as it is one of those things that is a little 'against the rules' but is sometimes necessary.

Supportive reporting is required when one or more SLAs are routinely missed and the underlying OLAs require related analysis to identify where the pinch points are.

This is a very small aspect of the Portion Pyramid, but I feel it is worth a mention as this type of report can speed up any SLA analysis and is a key component of continuous improvement.



The Business Intelligence / Management Information Level

The BI/MI Level is where the SLA and OLA metrics are aggregated and sliced in various permutations and possibly measured against a range of KPIs that may not be of interest at lower levels.

So while fundamentally based on the metrics from lower levels, it is likely that these will be extended.

A good example of this is the volume of Incident Tickets. For a Resolver Group, the volume of Incident Tickets should be nothing more than mitigation for poor SLA/OLA results when large amounts of tickets impact the workload.

Beyond the SLA and OLA based reports there are other areas that may be of interest. As previously mentioned in the OLA section, there is value in tracking the flow of Tickets across Resolver Groups and/or individuals within a single Resolver Groups.

This can seem like a superfluous report to smaller organizations when the majority of Tickets (for incidents at least) travel from the Service Desk to the Resolver Group and back with seldom diversion to other teams.

Larger organizations, with several Service Desks and Triage Teams beneath them, can benefit greatly from tracking the flow of Tickets to identify any bottle necks in the Service.

At the BI/MI Level, in-depth analysis of the volume of Incident Tickets has real value in its own right for validating the robustness of various services, stakeholder frustration and the successes or failures of Problem Management.

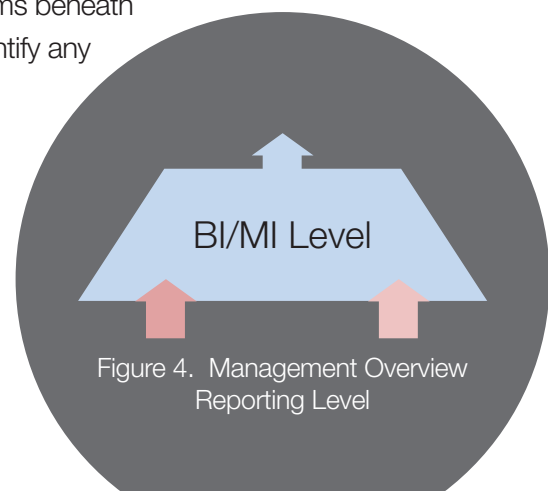


Figure 4. Management Overview Reporting Level



Business Intelligence / Management Information Report Types

Percentile Charts

The BI/MI reports hold the greatest scope for creative freedom within the ITIL Reporting Library. Looking for trends or patterns in any area of ITIL (though incident Management is by far the most likely candidate) opens up a world of options for inventive reporting based upon the OLA/SLA metrics generated in the previous level.

At every other level of the Portion Pyramid the onus is on accuracy and full data sets. Percentile Charts exclude the extreme records, i.e. those that fall outside a certain range. This gives the report audience an opportunity to examine the vast majority of the results without it being skewed by 'weird' data.

This is particularly helpful for weeding out those Tickets that have been open for three years with no sign of being resolved but appear on all the 'Aged Reports' and skew the results while making charts unreadable.

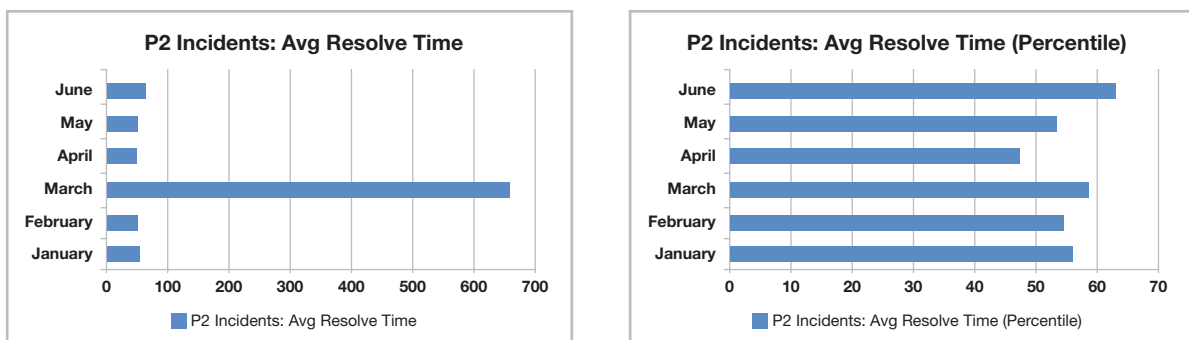


Figure 5. How Percentile Charts Make Clearer Reports

Of course, this approach should never be applied to lower level reports as it can hide a multitude of issues that should be tackled but is ideal for management level reporting when the focus is on the Services in a more general manner.

Pareto Charts

Twenty per cent of Pareto Charts are misused eighty per cent of the time.

The premise of the Pareto Chart is that it orders the target data by volume and expressing it as an accumulating percentage of the whole set, making it ideal for highlighting services attracting a large amount of Incidents.

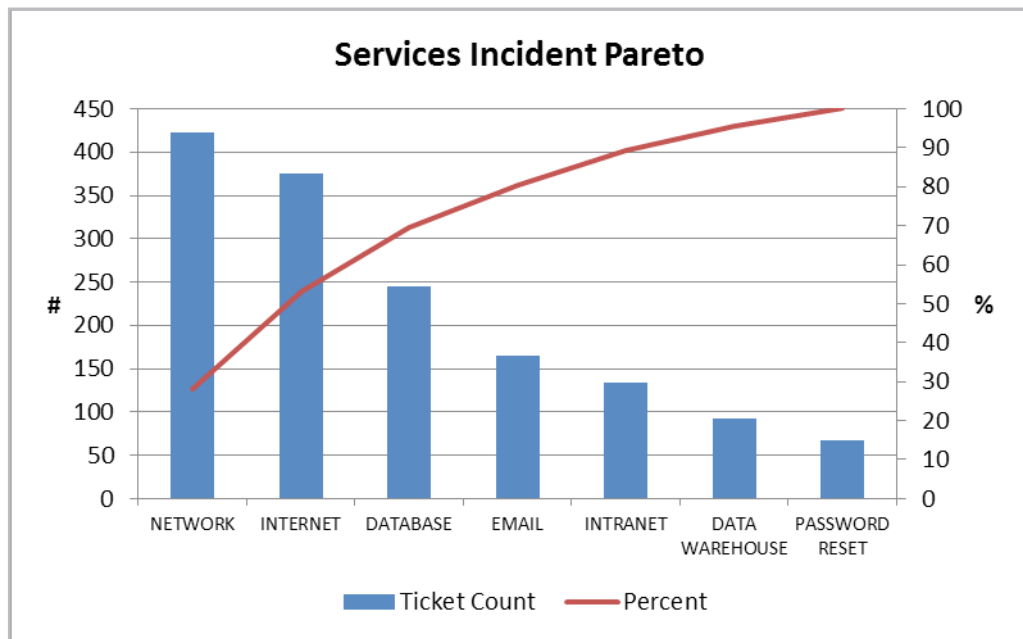


Figure 6. Pareto Example

Some reporting software has the Pareto as a chart type, but even when not available as a discrete option: a Pareto Chart can be created from a Bar Chart with a little work. Once developed, Pareto Charts are fantastic at highlighting which Services should be the focus of improvement for maximum impact on the ITIL solution as a whole.

....and Many More!

The above examples are the tip of the iceberg to illustrate the idea. The possibilities are not quite endless, but are near enough, and with the rest of the Portion Pyramid being quite prescriptive: it is nice to have an opportunity to be inventive in both the creation of our own visions and being able to fully engage with the Stakeholders' views and requirements with only (hopefully!) common sense as our guide.

I strongly suggest looking through the chart options in the reporting software to be used, as well as others for inspiration. A Waterfall Chart may be the perfect solution for tracking Ticket reassignments, or a Boston Matrix could clearly identify which Problem Tickets should be addressed first by cross referencing the severity and total downtime for the Incidents against the effort involved.

Business Intelligence / Management Information Audience

The audience for these reports are the Service, Process and Capacity Managers as well as those with more direct accountability like Incident, Problem and Change Managers. The intention being that they will be used in Performance Reviews with Resolver Groups. With this in mind, it is common for the above charts to be collated into dashboards or reporting packs.

As a general guide, use Reporting Packs for controlled focus on specific charted metrics (i.e. one chart per page/slide) to bring structure to review meetings and Dashboards when discussion across various metrics at once are required, generally with meaningful drilldown functionality to get to detail when required.

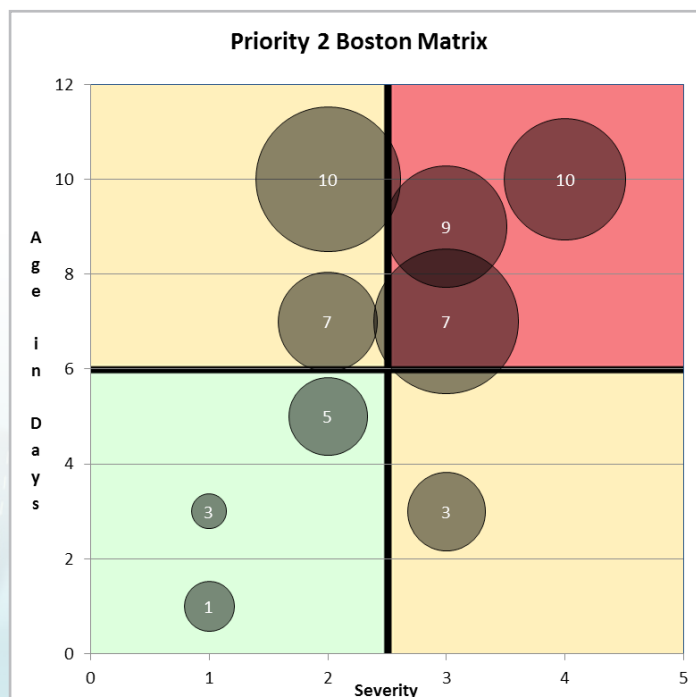


Figure 7. Boston Matrix for prioritising Priority 2 Tickets.

The Executive Level

This is often where the flashiest, most time consuming reporting is developed in an attempt to impress higher level management. However, if the ITIL Reporting Suite has been implemented one level at a time and proven itself to be reliable, the only report required at the Executive Level is this RAG status for the ITIL supported services as a whole.

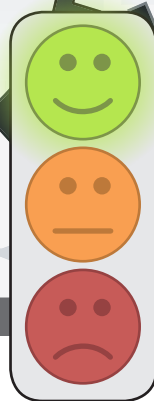


Figure 8. Minimalist Executive Level Reporting!

Because the above Executive Level report may not be Green, it's a good idea to add drilldown links on the Amber and Red to link to MI/BI Level reports that are already created, which in turn link through to SLA/OLA Level reports. This way the Executive Level reports can drill down and get a full view of the system without creating a raft of executive packs which are not dynamically focused and often remain unread despite the huge effort to develop them.

This could be it for the Executive Level in theory, but there may be value in complimenting the "executive indicator" with a trending version of the same report. Nothing flash is required - simply stack up the historic values in a clear manner and any recurring issues will appear.

Real world alert! This paper is a serving suggestion and not the law! Stakeholders may have their own idea of what would make the perfect report, possibly from working for different organizations or previous ITIL implementations.

If a Stakeholder wants a type of report that they feel comfortable with and have found useful previously, build it - assuming it breaks no ITIL laws (like mixing SLAs and OLA in the same report). The whole point of this white paper is to lay down guidelines to build the most comprehensive and least wasteful reporting Suite for ITIL. But at the end of the day it is only a method to do good work, not to deprive any one of the tools to do their job.



Figure 9. The Executive Summary Level

Executive Report Types

While in theory, at the zenith of the Executive triangle there should be a report that consists of one RAG status for the entire ITIL Implementation, in reality, a little more detail is required!

At this level of reporting the emphasis tends to shift to a high level review of Service Availability which the other reports may feature, but usually not with such prominence.

At the Executive Level, a Service failing its Availability metric is going to be the area of interest. It does not matter if support for other services is missing their targets (SLAs, OLAs and KPIs) as long as the Availability metric is met.

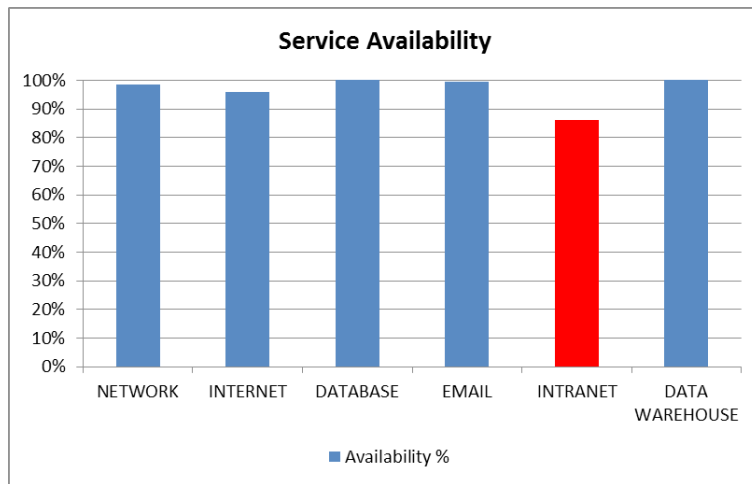


Figure 10. Service Availability as an Executive Level Filter.

Note: the above illustration shows a Y axis with a range from zero to one hundred per cent, rather than sixty to one hundred per cent that most reporting software would default to. As a one-off chart, the default is fine and may be easier to read. However, if this chart is ever going to be compared to other percentage based charts or even previous releases of itself, it only requires one odd result in a series and the scale on the Y axis will change: making it difficult to compare or even read at a glance.

In the above report, the Service 'INTRANET' is the only one of interest at this level and the starting point for further analysis. With this identified as the problem Service, all that is required for the Executive Level is access to the BI/MI reports below it, that contains the Metrics that will demonstrate where the weaknesses in the support for INTRANET lay and hopefully provide clues as to how it can be addressed.

For this approach to work there has to be a clear and easy to navigate path to Change and Problem Management as well as Incident Management. If a Service is consistently failing its Availability KPI, it is likely to be due to wider failing than Incident Tickets not being resolved.

The good news is that this breadth of interest gives us an excuse/ requirement to build an elegant Dashboard based solution with the bells, whistles and drilldowns expected at this level of reporting.



Executive Report Audience

The Executive report audience is aimed at Sponsors and organizational higher-ups whose main focus is the successful running of Services. This may be organization-wide and be one report that provides a holistic view of the full catalogue of Services and how they are performing.

More likely, Service Sponsors et al will require the collection of specific Services they are responsible.

General Audience Advice

The Executive Reports, like every report in the ITIL Reporting Suite, should be available to anyone who either contributes to the displayed results or is impacted by them regardless of which 'level' they sit in on the Portion Pyramid.

This serves two main purposes:

1. Making it possible for 'lower level' audiences to view higher level reports to see how their work fits into the greater organizational picture.
2. The reporting of metrics may become skewed higher up the Portion Pyramid with something as basic as how results are collated or grouped impacting the true picture. This can be deliberate (like with the Percentile Reporting example), but it is worth having invested people regularly reviewing the output.

The other direction of audience review is equally important and everyone from the Executive Level down should be able to investigate their summarised reports against the lower level metrics upon which it is based.



Report Scheduling

The subject of when reports should be generated and distributed has been skimmed over in this paper. This is a deliberate omission, as the timings of reports can vary organization to organization and report to report.

In the real world, report distribution is dependent on a variety of constraints that are non-negotiable and make any kind of meaningful recommendation impossible.

Report scheduling should be whenever the audience wants, within the limitations dictated by batch processes, data warehouse updates, third party data and regular review timings.

Obviously, scheduling also impacts report date ranges, which in turn make them a difficult subject to advise upon beyond the following general guideline:

- For each formal reporting period, there should be a complimentary 'progress so far' report to allow analysis as an on-going concern rather than surprising Stakeholders at the end of the reporting period.

Example: A 'Monthly: Major incident Report' will have a matching 'Month to Date: Major Incident Report' so the Service Desk can monitor their progress and take action as necessary.



Summary

The beauty of the ITIL framework is that by improving standards for services, it also allows us to implant and apply an optimum approach to reporting on the metrics that hold the services together.

Regardless of the nuances between organizations we can be sure that the same types of reports will provide value when applied at the correct level. At the same time, there is still room for creativity with the myriad of options available within the ITIL Reporting Suite, both in regards to matching the requirements of varying ITIL approaches and also creative sense. For example, a trend report can take many forms in appearance, date ranges/ periods and core measuring logic. This leaves massive scope to facilitate artistic flare, abstract stakeholder requirements and reporting software quirks.

Tell me another story: I imagine fans of agile to be a little less enamoured with all this discussion of prescriptive solutions so I would like to reiterate that this guide should not limit anything but rather set a minimum viable product that guarantees the wall to wall metric capture required for continuous improvement. But this is the beginning, not the end and there will always be extras and exceptions that only focused analysis will capture.

About Jason Dove

Jason Dove is an ISEB accredited Business Analyst, Developer and Professional Writer.

He consults for multiple leading businesses across various industries – from marketing to counter-terrorism.

Jason specialises in Business Intelligence related disciplines, with a strong emphasis on ITIL systems - a commonly overlooked opportunity for organizations to get the most from their IT investment.

With over 15 years of experience in the industry, Jason has leveraged his knowledge into that of author, blogger and is a contributor to print and online publications.



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