HP Service Manager

For supported Windows® and Unix® operating systems

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Reporting by Using Crystal Reports

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1 Reporting by Using Crystal Reports

HP Service Manager reporting works with Crystal Reports to provide improved reports and Business objects for the batch scheduling of reports. To run HP Service Manager reports with Crystal Reports, you need a working knowledge of the following:

- HP Service Manager 7.11
- Crystal Reports 2008
- The Service Manager ODBC driver.

To create reports you need a working knowledge of your DBMS or RDBMS, Crystal Reports 2008, and a general understanding of HP Service Manager applications and utilities.

For additional information about any of these concepts, see the following:

- For information about a particular RDBMS, see the vendor documentation for your database type.
- For database configuration, see the *HP Service Manager Installation Guide*.
- For **information** about HP Service Manager administration and configuration, and customizing the HP Service Manager product, see the HP Service Manager Help.

2 Installing Crystal Reports 2008

In HP Service Manager 7.11, reporting works with Crystal Reports 2008 to provide detailed reporting and analysis package that help maximize the abilities of your organization. Data monitoring and tracking, using Service Manager data from your environment, provide valuable insight to daily operations. Sample reports are provided so that you can build the reports into any reporting system.

Installation requirements and compatibility

Installation requirements

The following components must be installed prior to using the HP Service Manager reporting feature:

- HP Service Manager Legacy Listener
- ServiceCenter ODBC driver
- Crystal Reports 2008

Software compatibility

This reporting and analysis package was developed using the following software applications and is considered compatible with these versions only.

- HP Service Manager 7.11 run-time environment (RTE)
- HP Service Manager 7.11 Applications
- ServiceCenter 6.2 legacy ODBC Driver
- Crystal Reports 2008

Report compatibility

With the appropriate developer license for Crystal Reports 2008, all report files (*.rpt) can be customized to meet the needs of your business. Non-Crystal Reports users can review the PDF files for each report shipped to determine which *queries*, *joins*, and *filters* were used for the development of the report. They can then use these details to recreate similar reports by using their own queries, joins, and filters. Each query interacts with any application compatible with the ServiceCenter ODBC driver.

For additional compatibility information for Hewlett-Packard products, see the HP product support site at:

http://support.openview.hp.com/new_access_levels.jsp

Installing Crystal Reports 2008 with HP Service Manager

For information about installing and configuring the legacy listener, the ODBC driver, and installing Crystal Reports 2008 for use with HP Service Manager, see the *HP Service Manager Installation Guide*.

For Service Manager ODBC driver troubleshooting and best practices, see the Help topics packaged with Service Manager product.

Packaging and file location

The HP Service Manager 7.11 Reporting and Analysis Package is located in the Reporting directory on the installation image or by clicking **Download Crystal Report files** from download tab on the Autorun installation screen. This directory contains a set of seven (7) Crystal Reports report files (*.rpt). For additional information about downloading the out-of-box reports, see the *HP Service Manager Installation Guide*.

Language packs

The languages supported by the language pack install are:

- English
- German
- Korean
- Swedish
- French
- Spanish
- Dutch
- Chinese Simplified
- Japanese
- Italian
- Portuguese (Brazilian)
- Chinese Traditional

The default install language for Crystal Reports is set to English; however, if the native language of your OS is listed above, Crystal Reports will run in that language. The out-of-box reports are not localized and will render in English regardless of what language your Crystal Reports application is using.

You should refer to the Crystal Reports documentation for instructions on how to change the language that Crystal Reports uses.

3 Report Descriptions and Usage

The intention of this reporting package is to provide users with realistic examples of business reporting requirements. Each report is intended to meet the analytical needs of a generic Service Manager business user. All reports in the package can be executed on an HP Service Manager 7.11 out-of-box (OOB) system. The reports are intended to be used as a starting point for the development of more detailed, customer-specific reports.

The following tables describe the available application-specific reports, descriptions, and business use. The report files (*.rpt) can be opened in Crystal Reports and optionally modified to suit your needs. Detailed report descriptions can be viewed by clicking on the link in the first column of the table.

Change Management reports

Report name	**Business user**	**Description**
Open and Closed Change Requests	Service Management process managers, IT Management team	This report gives the user the ability to review, for a determined period, a breakdown of open and closed changes by category.

Open and Closed Change Requests

Description

The Open and Closed Change Requests report breaks down changes by state (open or closed), by category, and then by phase. This report contains a graphical representation of the breakdown of open versus closed changes using a pie chart to display the categories. You can click on any piece of the pie to display a detailed breakdown of that category by phase. This report organizes the information using groups and sub-groups to help users quickly view percentages and total counts by category and the current phase of the change.

Customer Value

This report provides a quick view of open and closed change requests for a specified time period. The percentages and totals displayed in group headings allow for a quick, visual overview of which change categories are generating the highest number of change requests, have a large number of change requests pending, or are approving and closing change requests quickly and efficiently. This information can then be used by a Change Management administrator to determine if the workflow in place needs to be adjusted or if a particular department requires additional training or resources to efficiently manage the number of change requests in a given area.

Configuration Management reports

Report name	Business user	Description
Configuration Item Relationships	Service Management process managers, IT Management team	This report provides a high level view of the configuration item relationships defined for the organization.
Configuration Item Summary	Service Management process managers, IT Management team	This report gives the user the ability to view all the configuration items within their organization grouped by type and then by status.

Configuration Item Relationships

Description

The Configuration Item Relationships report breaks down the configuration items (CIs) and their downstream relationships by type and then by subtype. If a CI has more than one downstream relationship, the report displays the total count. You can double-click the count to view the full list of downstream relationships.

Customer value

This report allows a Configuration Management administrator to evaluate the CI relationships defined in the organization and determine whether the relationship model accurately represents their business needs. The administrator can also see the outage definitions and determine whether to change them.

Configuration Item Summary

Description

The Configuration Item Summary report breaks down the configuration items by type and then by status. This report contains a pie chart displaying all configuration items (CIs) by type. You can double-click any piece of the chart to display a detailed breakdown of the CI type by its status. This report uses grouping to provide a view of total counts by type and status.

Customer value

This report gives the Configuration Manager administrator a high level overview of all the CIs defined within their organization. The administrator can view the details of any specific CI type and make decisions about inventory based on count and status of existing CIs. The report highlights in red any CIs currently down so that the administrator quickly sees which configuration items need attention.

Incident Management reports

Report name	Business user	Description
Open and Closed Incidents	Service Management process managers, IT Management team	This report gives the user the ability to review, for a determined period, a breakdown of open and closed incidents by categories and their associated areas.

Open and Closed Incidents

Description

The Open and Closed Incidents report breaks down incidents by state (open or closed), by category, and then by area. This report contains a graphical representation of the breakdown of open versus closed incidents using a chart to display the categories. You can click on any piece of the pie to display a detailed breakdown of that category by its areas. This report organizes the information using groups and sub-groups to help users quickly view percentages and total counts by category and area.

Customer value

This report provides a quick view of open and closed incidents for a specified time period. The percentages and totals displayed in group headings allow for quick determination of which categories and areas are generating the highest number of incidents, have a large number of incidents remaining open, or are resolving issues quickly. This information can then be used by an Incident Management administrator to determine if a particular department requires additional training or resources to efficiently manage the number of incidents in a given area.

Knowledge Management reports

Report name	Business user	Description
Knowledge Management Activity	Service Management process managers, IT Management team	This report gives the user a breakdown of administrative document activities within Knowledge Management, for a given period of time.
Knowledge Management Documents Summary	Service Management process managers, IT Management team	This report gives the user an overview of all knowledge documents broken down by document type.
Knowledge Management: User Demand	Service Management process managers, IT Management team	This report gives the user an overview of knowledge document usage highlighting documents that were viewed and documents that were used as solutions, broken down by source.
Knowledge Management usage by department (for SD Interactions)	Service Management process managers, IT Management team	This report gives the user the ability to review, for a determined period, a breakdown by department of closed Service Desk interactions that used a Knowledge Management document for a solution.

Knowledge Management Activity

Description

The Knowledge Management Activity report breaks down the Knowledge Management (KM) documents by administrative activity type. This report contains a graphical representation of the document activity using a pie chart. You can click on any piece of the pie to display the details of the documents for that activity type. The activity types 'View' and 'Used Solution' are not included as these are specific to the User Demand report and do not reflect administrative activity.

Customer Value

This report gives a KM administrator the ability to get a very high level overview of the activity occurring against the KM documents. The administrator can use this information to evaluate the KM document workflow and verify that the management of the resources is adequate. The information can be used to determine the volume of documents that are being created, modified, retired and approved. If there are several documents being created but none are being approved this might indicate that there are not enough approvers or that the approver process is inefficient.

Knowledge Management Documents Summary

Description

The Knowledge Management Documents Summary report breaks down Knowledge Management (KM) documents by type using a bar chart to display the totals. You can click any bar to display a detailed list of the documents within that document type.

Customer value

This report gives the KM administrator an overview of the breakdown of KM documents by type allowing the administrator to evaluate the status of the KM database.

Knowledge Management: User Demand

Description

The Knowledge Management: User Demand report breaks down Knowledge Management (KM) documents by source and then by their usage. This report contains a graphical representation of the breakdown of documents using a bar graph to display the number of documents viewed and the number of documents used as a solution per source. You can click on any bar of the chart to display the detailed usage counts within a source by document ID.

Customer value

This report provides a quick view of documents within a source that were viewed or used as a solution. This information can be used by a KM administrator to evaluate the content of the KM documents. An administrator can view the detailed information for a particular document within a source and see the total times a document was viewed compared to the total times the document was used as a solution. If the document was viewed several times but not used as a solution this might indicate that the content of the document needs to be updated. An administrator may also determine that the document is invalid and should be retired or that the title and keywords need to be updated in order to better facilitate user searches.

Knowledge Management usage by department (for SD Interactions)

Description

The Knowledge Management usage by department (for SD Interactions) report breaks down closed Service Desk (SD) interactions by department that use Knowledge Management (KM) documents as solutions to close an interaction. This report contains a bar chart of the ten departments that used the most documents as solutions. Additionally, there is a bar for the other departments with closed interactions. You can click any bar to display a detailed breakdown of that department's closed interactions using KM documents. This report organizes the information using groups to help users quickly view total counts by department.

Customer value

This report provides a quick view of closed interactions for a specified time period where KM documents contributed to the resolution. The totals displayed in group headings allow for quick determination of which departments are generating SD interactions being closed using KM documents. This information can then be used to determine if the KM document content for a particular area needs to be increased or updated. This provides the KM Manager with a comprehensive overview of whether or not there are enough documents to solve issues coming from a certain department.

Problem Management reports

Report name	Business user	Description
Open and Closed Problems	Service Management process managers, IT Management team	This report gives the user the ability to review, for a determined period, a breakdown of open and closed problems by area.

Open and Closed Problems

Description

The Open and Closed Problems report breaks down problems by state (open or closed), by area, and then by phase. This report contains a graphical representation of the breakdown of open versus closed problems using a pie chart to display the areas. You can click on any piece of the pie to display a detailed breakdown of that area by phase. This report organizes the information using groups and sub-groups to help users quickly view percentages and total counts by area and the current phase of the problem.

Customer Value

This report provides a quick view of open and closed problems for a specified time period. The percentages and totals displayed in group headings allow for quick determination of which areas are generating the highest number of problems, have a large number of problems remaining open, or are resolving issues quickly. This information can then be used by a Problem Management administrator to determine if the workflow in place needs to be adjusted or if a particular department requires additional training or resources to efficiently manage the number of problems in a given area.

Service Desk reports

Report name	Business user	Description
Escalated Interactions	Management Administrators Staff	This report provides the breakdown of interactions that have been escalated to change requests, incidents, known errors, and quotes.
Open and Closed Service Desk Interactions	Management Administrators Staff	This report gives the user the ability to review, for a determined period, a breakdown of open and closed Service Desk interactions by categories and their associated areas.

Escalated Interactions

Description

The Escalated Interactions report breaks down the interactions by the type of related record (change requests, incidents, known errors, quotes). This report uses a bar graph to provide a representation of the breakdown of interactions by related record type. You can double-click any bar of the graph to display a detailed breakdown of the related record type. To help users view totals quickly, the report organizes the information into groups of related record types.

Customer value

This report provides a quick view of escalated interactions opened during a specified period of time. The Service Desk administrator can see a high-level view of the activity originating from the Service Desk and the effect of this activity on the overall system workflows. This enables the administrator to determine what changes may be necessary in order to better support the Service Desk.

Open and Closed Service Desk Interactions

Description

The Open and Closed Service Desk Interactions report breaks down interactions by state (open or closed), by category, and then by area. This report contains a graphical representation of the breakdown of open versus closed interactions using a pie chart to display the categories. You can click on any piece of the pie to display a detailed breakdown of that category by its areas. This report organizes the information using groups and sub-groups to help users quickly view percentages and total counts by category and area.

Customer value

This report provides a quick view of for a specified time period. The percentages and totals displayed in group headings allow for quick determination of which categories and areas are generating the highest number of interactions, have a large number of interactions remaining open, or are resolving issues quickly. This information can then be used by a Service Desk administrator to determine if a particular help desk requires additional training or resources to efficiently manage the number of calls in a given area.

Service Level Management reports

Report name	Business user	Description
SLM: Response SLO Metrics	Management Administrators	This report gives the user the ability to review the target response metrics for the ten lowest performing Service Level Agreements (SLAs) in the specified month.
SLM: Summary	Management Administrators	This report gives the user the ability to review the target response and availability metrics for a single Service Level Agreement (SLA) within a given month.
SLM: Availability-Duration Metrics	Management Administrators	This report gives the user the ability to review the availability-duration metrics for the ten lowest performing Service Level Objectives (SLOs) per Service Level Agreement (SLA) in the specified month.
SLM: Availability-Uptime Metrics	Management Administrators	This report gives the user the ability to review the availability-uptime metrics for the ten lowest performing Service Level Objectives (SLOs) per Service Level Agreement (SLA) in the specified month.

SLM: Response SLO Metrics

Description

The SLM: Response SLO Metrics report breaks down the target response objectives by Service Level Agreement (SLA) and then by Service Level Objective (SLO). This report contains a graphical representation of the ten SLAs with the lowest response results ordered from lowest to highest. You can click any bar to display a detailed breakdown of that SLA by its SLOs. In the detailed breakdown you can see another chart representing the ten SLOs with the lowest percentage of response results also ordered from lowest to highest. For cases with more than ten SLAs/SLOs, the charts display an extra bar that can be clicked to display the remaining detailed information.

Customer Value

This report provides a quick analysis of the response objectives achieved for a given month, with a special emphasis in areas within Service Management that need improvement due to the lack of adequate response within the time frame specified in the agreement. Based on this data, management can take actions such as redefining contracts, providing additional training to enhance the response times of the service desks, and restructuring the organization so that each area has sufficient resources to meet the response objectives.

SLM: Summary

Description

The SLM: Summary report displays all the response and availability data for a single Service Level Agreement (SLA) for a specified month. The data is grouped by Service Level Objective (SLO) response and then by SLO availability data. The SLO availability data is then grouped by SLO type (duration and uptime).

Customer Value

This report provides an overview of the performance for an SLA within a given month. This information can be used by management to quickly understand how successful their organization has been in fulfilling the SLA requirements. For example, if the SLA requirements are not being met, this might indicate that the helpdesk needs additional training or resources to fulfill the requirements outlined in the SLA definition, or that the SLA needs to be redefined with more realistic requirements.

SLM: Availability-Duration Metrics

Description

The SLM: Availability-Duration Metrics report breaks down the target availability-duration objectives by Service Level Agreement (SLA) and then by Service Level Objective (SLO). This report contains a graphical representation of the ten SLAs with the lowest availability-duration metrics ordered from lowest to highest. You can click any bar to display a detailed breakdown of that SLA by its SLOs. In the detailed breakdown, you can see another chart that represents the ten SLOs with the lowest percentage of availability-duration metrics also ordered from lowest to highest. For cases with more than ten SLAs/SLOs, the charts display an extra bar that can be clicked to display the remaining detailed information.

Customer Value

This report provides a quick analysis of the availability-duration objectives achieved for a given month. This information can be used by management to quickly assess the status of the Configuration Items (CIs) within their organization. For example, the data might indicate that a particular CI is frequently unavailable within the given month and fails to meet the target availability-duration defined within its SLO. Management can then investigate and determine whether the CI needs to be replaced or serviced. Management can also determine that more resources need to be added to the IT department in order to better maintain the availability of the organization's assets. Management can then use this information to prevent future outages which can affect overall productivity and ROI.

SLM: Availability-Uptime Metrics

Description

The SLM: Availability-Uptime Metrics report breaks down the target availability-uptime objectives by Service Level Agreement (SLA) and then by Service Level Objective (SLO). This report contains a graphical representation of the ten SLAs with the lowest availability-uptime metrics ordered from lowest to highest. You can click any bar to display a detailed breakdown of that SLA by its SLOs. In the detailed breakdown, you can see another chart that represents the ten SLOs with the lowest percentage of availability-uptime metrics also ordered from lowest to highest. For cases with more than ten SLAs/SLOs, the charts display an extra bar that can be clicked to display the remaining detailed information.

Customer Value

This report provides a quick analysis of the availability-uptime objectives achieved for a given month. This information can be used by management to quickly assess the status of the Configuration Items (CIs) within their organization. For example, the data might indicate that a particular CI is frequently unavailable within the given month and fails to meet the target uptime defined within its SLO. Management can then investigate and determine whether the CI needs to be replaced or serviced. Management can also determine that more resources need to be added to the IT department in order to better maintain the availability of the organization's assets. Management can then use this information to prevent future outages which can affect overall productivity and ROI.