

2.1 Generate Reports

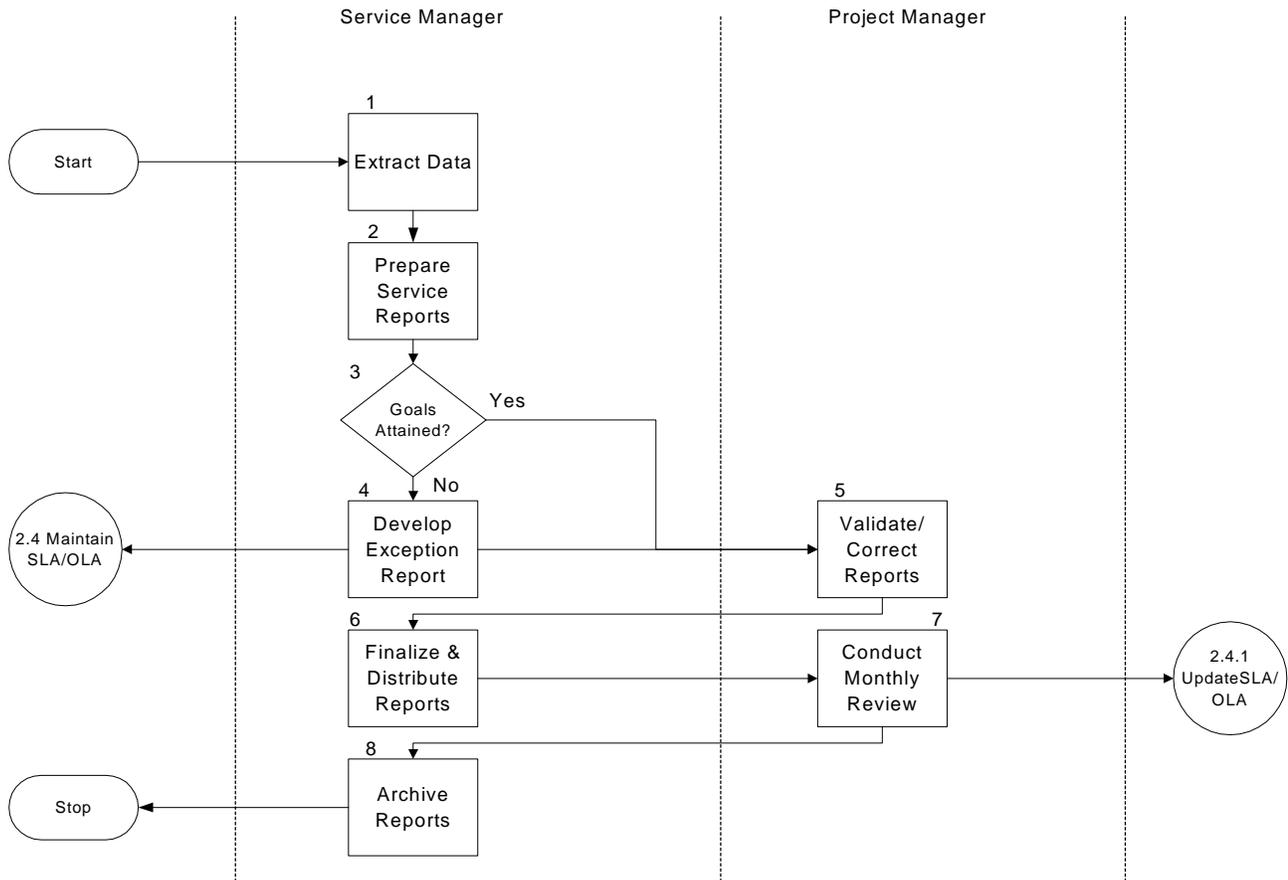
Introduction

This process enables the reporting of operational performance to the client. It defines the steps for collecting, analyzing and reporting on operational performance. The primary deliverable of this process is the Service Report which includes the monthly service level metrics and ad hoc client requested information. Service Reports are distributed by the 15th of each month and represent all closed problems, requests and related performance information for the previous calendar month.

** Tip: While reading through the following section please be aware that Inputs, Entrance Criteria, Outputs and Exit Criteria can either be required or not required. This level of detail will be included within the documented steps throughout the process.*

Process Owner:	<input type="checkbox"/> Application Manager
Supplier(s):	<input type="checkbox"/> Customer Care
Customer(s):	<input type="checkbox"/> Client, Client Partner, Modernization Partner PMO
*Input(s):	<input type="checkbox"/> Request Tracking Tool data
*Entrance Criteria:	<input type="checkbox"/> All data from the previous calendar month is complete and accurate
*Output(s):	<input type="checkbox"/> Service Report
*Exit Criteria:	<input type="checkbox"/> Approval of the monthly Service Report (and possibly exception report) by the Application Manager
Related Processes:	<input type="checkbox"/> Improve Service and Productivity <input type="checkbox"/> Maintain SLA & OLA
Related Documentation (Job Aids/ Procedures):	<input type="checkbox"/> Communications Plan <input type="checkbox"/> Service Level Agreement <input type="checkbox"/> Job Aid: Reporting Spreadsheet <input type="checkbox"/> Job Aid: Exception Report Template
Key Tools	<input type="checkbox"/> Request Tracking Tool

Process Workflow Diagram



Process Workflow Description

Step #	Step Description	Responsibility	Tools	Deliverables/ Outcomes
Start				
1.	Extract Monthly Data - Collect the external data required to calculate each Service Metric by exporting the data into MS Excel format.	Customer Care	Request Tracking Tool , Interwoven, Excel	Extracted data in MS Excel format.
2.	Prepare Service Reports - Input the data into the reporting spreadsheet and run the macros to generate the report summaries. The reporting spreadsheet is updated and all charts are verified to ensure they reflect the prior month's performance.	Customer Care	Excel, Reporting Spreadsheet	Service Report
3.	Goals Attained?	Customer Care	N/A	N/A
4.	Develop Exception Report - An exception report should be written for all entries that missed service level targets.	Customer Care	Excel, Word, Reporting Spreadsheet , Exception Report Template	Exception Report
5.	Validate Exception Reports - Data elements are reviewed/validated for errors and integrity check. For all errors discovered, research is conducted on the source data, work order or team members to determine the cause. All errors found in the original data are corrected; in the event the error cannot be corrected, include an explanation in the metric text summary or in the exception report.	Application Manager	N/A	Validated and corrected exception reports
6.	Finalize & Distribute Report - Reports are printed, assembled and delivered for use at the review meeting.	Customer Care	E-mail	Distributed Reports

Step #	Step Description	Responsibility	Tools	Deliverables/ Outcomes
7.	Conduct Monthly Review - Each month, the Service Report is reviewed and exceptions are discussed for cause/effect - status. All concerns and suggestions are captured and included in an action plan developed as a component of the Maintain SLA/OLA process.	Application manager	N/A	Captured concerns and suggestions
8.	Archive Report - All reports are saved and archived.	Customer Care	N/A	Report is Archived Centrally
Stop				



Revision Log

This log should be updated after each new version as a means of tracking the changes that have been made to the document. Relevant information includes: date of revision, name of person making the revision, and a short description of the changes.

Version	Revised By	Description of Changes