



Halo Reporting & Analytics

1,000+ Reports. Every Way to Use Them.

The complete guide to Halo's built-in reporting, dashboards, and data access

For IT Managers, Service Desk Leaders, and Data Teams

The Full Reporting Picture

Four ways to get data out of Halo – from zero-code to full database access

Halo's reporting capability is far deeper than most ITSM platforms. It's not a single report builder – it's four distinct tiers, covering everyone from the IT manager who wants a weekly SLA summary to the data engineer who needs direct database access for PowerBI. Every tier is included as standard. No add-ons, no extra licences.

Tier	What It Is	Who It's For
1,000+ Pre-Built Reports	A curated library of reports covering ITIL KPIs, SLA compliance, agent performance, asset data, and the full SDI Best Practice set. Configured, graphed, and ready to run from day one.	Everyone – no setup required
Zero-Code Query Builder	Point-and-click report creation. Select entities, fields, and conditions. Apply grouping, counts, sums, and averages. No SQL or developer needed.	IT managers and service desk leaders
AI Query Builder	Describe what you need in plain English. Halo's AI reads the live database schema and generates the query automatically.	Anyone who can describe a question
Full SQL + External Tools	Write custom SQL directly against the Halo database. Or connect via read-only database access to PowerBI, Tableau, or any external BI tool.	Technical teams and BI specialists

Every tier is included in every Halo ITSM licence at no extra cost. There are no reporting add-ons and no per-report charges.

1,000+ Pre-Built Reports

Configured, graphed, and ready to run from day one – no setup required

Halo ships with over 1,000 curated reports covering every area of IT service management. The library includes the full SDI Best Practice report set – the reports recommended by the Service Desk Institute for measuring and demonstrating service quality – alongside ITIL KPIs, compliance tracking, asset data, and operational metrics. Every report is pre-configured with charts and ready to run without any configuration.

1 Open the report library

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The full library is available from the Halo menu. Reports are organised by category – incidents, problems, changes, requests, assets, SLAs, and more. Search or browse to find what you need.

2 Add to your personal library

2

Save any report to your personal library for one-click access from the home screen. Reports you use regularly are always a single click away.

3 Run, filter, and export

3

Apply date ranges, team filters, and any other available parameters. Export results as PDF, CSV, or Excel – ready for board packs, service reviews, and management reporting.

4 Schedule for automatic delivery

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Set any report to run and distribute automatically – daily, weekly, monthly, or on a custom schedule. Halo emails the output to whoever needs it.

The SDI Best Practice reports alone cover first contact resolution, MTTR, SLA breach rates, reopened tickets, escalation rates, and customer satisfaction scoring – everything a service desk needs to demonstrate performance and drive continuous improvement.

Build Your Own – Three Ways

Zero-code, AI-generated, or custom SQL: choose the approach that suits your team

When the pre-built library doesn't have exactly what you need, Halo gives you three ways to build a custom report. Each approach targets a different level of technical confidence – and all three produce the same polished, schedulable output.

Zero-Code Query Builder

Point-and-click report creation for any IT manager

Select the entity you want to report on – tickets, assets, agents, teams. Choose the fields you want to see. Apply conditions, groupings, and aggregations (count, sum, average) using dropdown menus. Rename columns, choose a chart type, and save. No SQL knowledge required at any stage. If you can describe what you want to measure, you can build the report.

AI Query Builder

Plain-English prompts, Halo writes the query

Type a question in plain English – for example, 'Show me all incidents breached in the last 30 days by team, sorted by volume.' Halo's AI reads the live database schema and generates the query automatically. Review the result, adjust if needed, and save as a reusable report. No SQL knowledge required – the AI handles the translation.

Custom SQL

Full database access for technical users who need complete flexibility

For analysts and developers who prefer SQL, Halo exposes the full database schema for direct querying. Write any query you need – joins across multiple tables, calculated fields, complex aggregations. The output renders in Halo's standard report format with full charting and scheduling support.

Dashboards, Distribution & External Tools

Live visibility, automated delivery, and full BI tool integration

Reporting in Halo extends well beyond running reports on demand. Live dashboards give your team real-time visibility. Scheduled distribution means the right data reaches the right people automatically. And for organisations that need enterprise-grade analytics, Halo's read-only database access connects directly to PowerBI, Tableau, and other BI tools.



Live Dashboards – Unlimited

Create unlimited dashboards showing real-time data from your Halo instance. 3 pre-configured dashboards are included out of the box – SLA health, end-user feedback, and ticket resolution. Add widgets by drag-and-drop, drill through any metric to the underlying tickets, and publish globally or per team.



Automated Report Distribution

Schedule any report to run and deliver automatically – daily, weekly, monthly, or on a custom recurrence. Send directly to individuals or teams by email, or publish reports automatically to SharePoint or any external website. Once configured, no human intervention is needed.



PowerBI & External BI Tools

Halo provides read-only access to the underlying MS SQL database, enabling direct connections from PowerBI, Tableau, or any other BI tool. Data teams can build enterprise-grade analytical models over live Halo data without leaving their preferred tooling.



Role-Based Access & Dynamic Filtering

Restrict any report or dashboard by role, team, department, or site. Reports can also be configured to filter dynamically – each user sees only their own relevant data, without needing separate report versions. Share dashboards in read-only mode with stakeholders who don't hold a Halo licence.



Ready to see Halo reporting in action?

Allied ESM can walk you through the full reporting suite using your own use cases.

As a pure play Halo partner, Allied ESM has configured reporting for organisations across the UK and beyond – from simple scheduled SLA reports to full PowerBI integrations drawing on live Halo data. We set up the dashboards, build the report templates, train your team, and stay on hand as your reporting needs evolve.

- Pre-built report library review – identifying the reports that matter to your business
- Custom report and dashboard build included in every Allied ESM implementation
- AI query builder and SQL training for technical team members
- PowerBI connector setup and initial model build available as an add-on service

Get in Touch



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