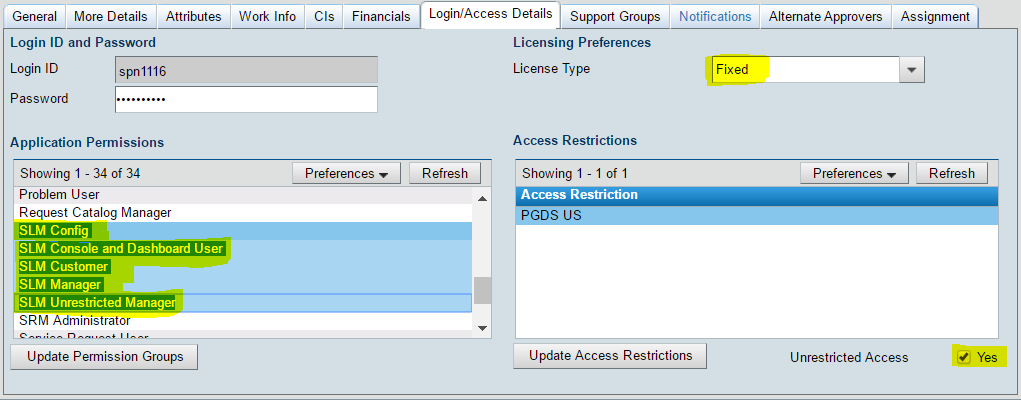
|  |  |
| --- | --- |
| **BMC Remedy Deployment**  **Configuration and Workflow Specifications** | |
| **11/17/2016 – Version 4** | |
| **Description of Changes** | * **Implements the configuration-based OLA items that will enable OLA tracking for PGDS US Incident tickets.** * **Includes instructions for entering Service Targets, Business Time Segments and Entities, Milestone and Action Templates, and other required configuration items.** * **Does NOT include:** * **Enhancement allowing the ability to sort/view Assignment and Resolution OLA date within the Incident Management Console.** |

**Prerequisites**

* If you receive any access-related errors while implementing the configuration, check my People record (Login ID = spn1116) and ensure your People record has the same permissions as mine.
* Update your People record in Remedy so that it has the following SLM-related Application Permissions. I used a Fixed License when applying these permissions to my profile. **(You may also need to add the Administrator permission, if you don’t have it already.)**   
  + **SLM Config**
  + **SLM Console and Dashboard User**
  + **SLM Customer**
  + **SLM Manager**
  + **SLM Unrestricted Manager**



**Configuration Instructions**

These instructions should be followed in order by section. Earlier pieces are required for later pieces to be implemented.

**Creating the custom Goal Type**

1. Go to the Application Administration Console by clicking the **Applications** bar on the far left of the screen, then **Administrator Console**, then **Application Administration Console**.
2. Click the **Custom Configuration** tab near the top of the screen.
3. Scroll down slightly to find the **Service Level Management** item. Click that, then click **Configure Application Settings,** then click **Goal Types.** With Goal Types highlighted, click the **Open** button.
4. Enter the following data into the fields at the top:  
   1. **Display Label\*** = Incident Assignment Time
   2. **Goal Type\*** = Request-Based
   3. **Status\*** = Active
5. Click the **Save** button. To confirm your record was saved, click the **Refresh** button below the table, and you should see a row in the table with the data you just entered.

**Creating the PGDS Folder**

1. Go to the Service Level Management Console by clicking the **Applications** bar on the far left of the screen, then **Service Level Management**, then **Service Level Management Console**.
2. In the lower-left corner, click the **Create** button. This button is to the immediate left of the Rename and Delete buttons.
3. A window will pop up stating “Enter the label for the new folder you are creating:”. Type in **PGDS** and click OK.

**Creating the Business Time Segments**

1. Go to the Application Administration Console by clicking the **Applications** bar on the far left of the screen, then **Administrator Console**, then **Application Administration Console**.
2. Click the **Custom Configuration** tab near the top of the screen.
3. Scroll down slightly to find the **Service Level Management** item. Click that, then click **Configure Business Time,** then click **Shared Entity/Segments.** With Shared Entity/Segments highlighted, click the **Open** button.
4. Click the **Business Time Segment** tab near the top of the screen.
5. Click the **Create** button below the table. This will open the Business Time Segment screen in New mode.
6. Enter the following data into the fields:  
   1. **ID** = PGDS OLA – Available 8a-5p
   2. **Description\*** = PGDS OLA – Available 8a-5p
   3. **Availability\*** = Available
   4. **Enable** = Yes (check the box)
   5. **Level** = 1
   6. **Action\*** = Create as Described
   7. **Duration Type\*** = Recurring
   8. **Start Date\*** = 11/21/2016
   9. **Start Time\*** = 8:00:00 AM
   10. **End Date\*** = 12/31/2020
   11. **End Time\*** = 5:00:00 PM
   12. **Recurrence Type\*** = Weekly
   13. **Weekly Frequency** = 1
   14. **Check the boxes for Monday, Tuesday, Wednesday, Thursday, Friday.** (Saturday and Sunday should be unchecked.)
7. Click the **Save** button in the upper-left corner of the screen.

**Creating the Business Time Segments (continued)**

1. Enter the following data into the fields:  
   1. **ID** = PGDS OLA – Unavailable 12a-8a
   2. **Description\*** = PGDS OLA – Unavailable 12a-8a
   3. **Availability\*** = Unavailable
   4. **Enable** = Yes (check the box)
   5. **Level** = 2
   6. **Action\*** = Create as Described
   7. **Duration Type\*** = Recurring
   8. **Start Date\*** = 11/21/2016
   9. **Start Time\*** = 12:00:00 AM
   10. **End Date\*** = 12/31/2020
   11. **End Time\*** = 7:59:59 AM
   12. **Recurrence Type\*** = Weekly
   13. **Weekly Frequency** = 1
   14. **Check the boxes for Monday, Tuesday, Wednesday, Thursday, Friday.** (Saturday and Sunday should be unchecked.)
2. Click the **Save** button in the upper-left corner of the screen.
3. Enter the following data into the fields:  
   1. **ID** = PGDS OLA – Unavailable 5p-12a
   2. **Description\*** = PGDS OLA – Unavailable 5p-12a
   3. **Availability\*** = Unavailable
   4. **Enable** = Yes (check the box)
   5. **Level** = 2
   6. **Action\*** = Create as Described
   7. **Duration Type\*** = Recurring
   8. **Start Date\*** = 11/21/2016
   9. **Start Time\*** = 5:00:01 PM
   10. **End Date\*** = 12/31/2020
   11. **Click the End of Day checkbox.** This will set **End Time\*** to 11:59:59 PM
   12. **Recurrence Type\*** = Weekly
   13. **Weekly Frequency** = 1
   14. **Check the boxes for Monday, Tuesday, Wednesday, Thursday, Friday.** (Saturday and Sunday should be unchecked.)
4. Click the **Save** button in the upper-left corner of the screen.

**Creating the Business Time Segments (continued)**

1. Enter the following data into the fields:  
   1. **ID** = PGDS OLA – Unavailable Weekends
   2. **Description\*** = PGDS OLA – Unavailable Weekends
   3. **Availability\*** = Unavailable
   4. **Enable** = Yes (check the box)
   5. **Level** = 2
   6. **Action\*** = Create as Described
   7. **Duration Type\*** = Recurring
   8. **Start Date\*** = 11/21/2016
   9. **Start Time\*** = 12:00:00 AM
   10. **End Date\*** = 12/31/2020
   11. **Click the End of Day checkbox.** This will set **End Time\*** to 11:59:59 PM
   12. **Recurrence Type\*** = Weekly
   13. **Weekly Frequency** = 1
   14. **Check the boxes for Saturday, Sunday.** (The five checkboxes for Monday through Friday should be unchecked.)
2. Click the **Save** button in the upper-left corner of the screen.
3. Enter the following data into the fields:  
   1. **ID** = PGDS OLA – Unavailable Jackson Holiday 2016-2017
   2. **Description\*** = PGDS OLA – Unavailable Jackson Holiday 2016-2017
   3. **Availability\*** = Unavailable
   4. **Enable** = Yes (check the box)
   5. **Level** = 3
   6. **Action\*** = Create as Described
   7. **Duration Type\*** = Recurring
   8. **Start Date\*** = 11/21/2016
   9. **Start Time\*** = 12:00:00 AM
   10. **End Date\*** = 12/31/2017
   11. **Click the End of Day checkbox.** This will set **End Time\*** to 11:59:59 PM
   12. **Recurrence Type\*** = Specific Dates
   13. In the **Specific Dates** field, enter the following data:  
         
       11/24/2016;12/26/2016;1/2/2017;1/16/2017;2/20/2017;4/14/2017;5/29/2017;7/4/2017;9/4/2017;11/23/2017;12/25/2017
4. Click the **Save** button in the upper-left corner of the screen.

**Creating the Business Time Segments (continued)**

1. Close this tab on your browser. A Remedy tab should be shown where **Shared Entity/Segments** is still highlighted.

**Creating the Business Time Entity and relating the Time Segments**

1. From the Remedy tab where **Shared Entity/Segments** is still highlighted, click **Open.**
2. Ensure you’re looking at the **Business Time Entity** tab and not the **Business Time Segment** tab. (It should be on Business Time Entity by default.)
3. Click the **Create** button below the Business Time Entity table.
4. In the pop-up window, enter the following data:  
   1. **Title** = PGDS OLA – Business Hours
   2. **Status** = Enable
5. Click the **Save** button.
6. Click the **Refresh** button within the Business Time Entity table; you should see your newly-created record.
7. Click your newly-created PGDS OLA – Business Hours record to select it. The Related Time Segment table (below) should be blank.
8. Click the **Relate Activity** button below the Related Time Segment table.
9. Resize the window that popped up (called Searching for Business Activities) so that you can see the **Relate Selected Record** and **Close** buttons in the bottom left corner of the pop-up window.
10. Click the **Search** button, directly below the Priority field. (I was unable to get any of the search fields to locate the records we want via search terms, so clicking Search will show all the segments.)
11. Click the **ActivityID** or **Description** header in the table to sort, and then locate the five records with **PGDS OLA** in the ActivityID or Description field.
12. Click the top-most PGDS OLA record, then hold your Shift key, then click the bottom-most PGDS OLA record, then release the Shift key. This should have selected all five PGDS OLA records.
13. Click the **Relate Selected Record** button.
14. The pop-up window should be closed. The Related Time Segment window should now show the five PGDS OLA records, and the PGDS OLA – Business Hours record should still be highlighted within the Business Time Entity table.

**Configuring the Incident Data Source**

1. Go to the Application Administration Console by clicking the **Applications** bar on the far left of the screen, then **Administrator Console**, then **Application Administration Console**.
2. Click the **Custom Configuration** tab near the top of the screen.
3. Scroll down slightly to find the **Service Level Management** item. Click that, then click **Configure Application Settings,** then click **Data Sources.** With Data Sources highlighted, click the **Open** button.
4. In the Configure Service Target Data Source table, click the row where Data Source is **HPD:Help Desk.** This row should now be highlighted.
5. In the **Data Source Settings** section, click the **Request-Based** tab.
6. Click the **Define** button, which is to the right of the Reset Goal for Same Request When field.
7. Enter the following data into the fields:
   1. **Qualification** = ‘Priority’ != ‘DB.Priority’  
        
      **NOTE:** You can either manually type the above into the field, or you can use the Fields and Operators drop-down menus to select the fields, which will automatically enter items into the Qualification field. If you use this method, the field to add will be called **Priority\*.**  
        
      You will NOT be able to add the ‘DB.Priority’ portion by using the Fields drop-down. Choose the **Priority\*** field again, and then manually type in the rest (the DB. portion) so that the qualification matches the above.
   2. Ensure the **Use Transaction Field Value** checkbox is **checked.**
   3. Click **OK.**
8. Click the **1. Modify Fields** button. This will pop at message at the top of your screen saying “The process of creating join forms and fields has started…” This is normal.
9. Click the **Advanced** tab. Near the bottom of the screen is a field labelled **Fields and Join Form Create Status.** It may already say Created Successfully. To verify that the operation from Step 8 is done, click the **Refresh** button below the Configure Service Target Data Source table, and then click on the row where Data Source is HPD:Help Desk. If it still says Created Successfully, this step is done. If it does not, continue to refresh and re-select the HPD:Help Desk row until it says Created Successfully.

**Configuring the Incident Data Source (continued)**

1. Click the **2. Modify Filter** button. This will pop a message at the top of your screen saying “The process of creating filters and filter guide has started…” This is normal.
2. Click the **Administration** tab, then the **Refresh** button. The rows in this table will have a Rule Build Status of either Built Successfully or Build In Progress. Click **Refresh** until all rows have a Rule Build Status of Built Successfully. This did not take very long in DEV (maybe 30-45 seconds), so I don’t expect it to take a large amount of time in PROD.

**Configuring the Measurement Criteria Templates**

1. Go to the Application Administration Console by clicking the **Applications** bar on the far left of the screen, then **Administrator Console**, then **Application Administration Console**.
2. Click the **Custom Configuration** tab near the top of the screen.
3. Scroll down slightly to find the **Service Level Management** item. Click that, then click **Configure Application Settings,** then click **Templates.** With Templates highlighted, click the **Open** button.
4. In the Show Templates For selection menu, choose **Measurement Criteria.**
5. Click the **Create** button, and in the pop-up box, enter the following data into the fields:  
   1. **Name\*** = PGDS Incident Assignment OLA Measurement
   2. **Applies To\*** = Incident
   3. **Measurement Type** = Request-Based
   4. **Start When\*** = 'Assigned Support Company' = "PGDS US" AND 'Assignee' = $\NULL$
   5. **Stop When\*** = 'Assigned Support Company' = "PGDS US" AND 'Assignee' != $\NULL$
   6. **Exclude** = 'Assigned Support Company' != "PGDS US"
6. Click **OK.**
7. Click the **Create** button, and in the pop-up box, enter the following data into the fields:  
   1. **Name\*** = PGDS Incident Resolution OLA Measurement
   2. **Applies To\*** = Incident
   3. **Measurement Type** = Request-Based
   4. **Start When\*** = 'Assigned Support Company' = "PGDS US" AND 'Status' < "Resolved"
   5. **Stop When\*** = 'Assigned Support Company' = "PGDS US" AND 'Status' >= "Resolved"
   6. **Exclude** = 'Assigned Support Company' != "PGDS US" OR 'Status' = "Pending"
8. Click **OK.**

**Configuring the Milestone Templates**

1. Go to the Application Administration Console by clicking the **Applications** bar on the far left of the screen, then **Administrator Console**, then **Application Administration Console**.
2. Click the **Custom Configuration** tab near the top of the screen.
3. Scroll down slightly to find the **Service Level Management** item. Click that, then click **Configure Application Settings,** then click **Templates.** With Templates highlighted, click the **Open** button.
4. In the Show Templates For selection menu, choose **Milestone.** Then, click the **Create** button.
5. In the pop-up window, choose **RequestBased** and then **Incident** for the two drop-down menus. Click **OK**.
6. In the next pop-up window, enter the following data into the fields:
   1. **Title\* =** PGDS Assignment Milestone 75%
   2. **Execute When\*** = Percentage Of Goal Time From Start
   3. **At\*** = 75
   4. **Execute If\*** = 'Assigned Support Company' = "PGDS US" AND 'Assignee' = $\NULL$
7. Click **OK.** You should be returned to the Configure Templates screen, and the top table should now show your Milestone template.
8. Click **Create** again.
9. In the pop-up window, choose **RequestBased** and then **Incident** for the two drop-down menus. Click **OK**.
10. In the next pop-up window, enter the following data into the fields:
    1. **Title\* =** PGDS Resolution Milestone 75% - Assignee
    2. **Execute When\*** = Percentage Of Goal Time From Start
    3. **At\*** = 75
    4. **Execute If\*** = 'Assigned Support Company' = "PGDS US" AND 'Status' < "Resolved" AND 'Status' != "Pending" AND 'Assignee' != $\NULL$

**Configuring the Milestone Templates (continued)**

1. Click **OK.** You should be returned to the Configure Templates screen, and the top table should now show both of your Milestone templates.
2. Go to the Application Administration Console by clicking the **Applications** bar on the far left of the screen, then **Administrator Console**, then **Application Administration Console**.
3. Click **Create** again.
4. In the pop-up window, choose **RequestBased** and then **Incident** for the two drop-down menus. Click **OK**.
5. In the next pop-up window, enter the following data into the fields:
   1. **Title\* =** PGDS Resolution Milestone 75% - No Assignee
   2. **Execute When\*** = Percentage Of Goal Time From Start
   3. **At\*** = 75
   4. **Execute If\*** = 'Assigned Support Company' = "PGDS US" AND 'Status' < "Resolved" AND 'Status' != "Pending" AND 'Assignee' = $\NULL$
6. Click **OK.** You should be returned to the Configure Templates screen, and the top table should now show all three of your Milestone templates.

**Configuring the Milestone Action Templates**

1. Go to the Application Administration Console by clicking the **Applications** bar on the far left of the screen, then **Administrator Console**, then **Application Administration Console**.
2. Click the **Custom Configuration** tab near the top of the screen.
3. Scroll down slightly to find the **Service Level Management** item. Click that, then click **Configure Application Settings,** then click **Templates.** With Templates highlighted, click the **Open** button.
4. In the Show Templates For selection menu, choose **Action.** Then, click the **Create** button.
5. In the pop-up window, choose **RequestBased**, then **Incident**, then **Alert or Email** for the three drop-down menus. Click **OK.**
6. Enter the following data into the fields:
   1. **Title**\*:PGDS Assignment Notification 75%
   2. **Delivery Method** = Email
   3. **To\*** = $Assigned Group$
   4. **Subject** = Incident $Incident Number$ has not been assigned.
   5. **Message**\* =   
        
      Greetings $Assigned Group$,  
        
      Incident $Incident Number$ has not been assigned and is in danger of breaching the Assignment OLA. Please ensure this is assigned as soon as possible.  
        
      Customer: $First Name$ $Last Name$  
      Summary: $Description$  
      Priority: $Priority$  
        
      Thank you,  
      Remedy
   6. Uncheck the **AR Task** and **Web URL** shortcuts.
   7. Click **OK.**

**Configuring the Milestone Action Templates (continued)**

1. Click **Create** again.
2. In the pop-up window, choose **RequestBased**, then **Incident**, then **Alert or Email** for the three drop-down menus. Click **OK.**
3. Enter the following data into the fields:
   1. **Title**\*:PGDS Resolution Notification 75% - Assignee
   2. **Delivery Method** = Email
   3. **To\*** = $Assignee Login ID$
   4. **Subject** = Incident $Incident Number$ has not been resolved.
   5. **Message**\* =   
        
      Greetings $Assignee$,  
        
      Incident $Incident Number$ has not been resolved and is in danger of breaching the Resolution OLA. Please ensure this is resolved as soon as possible.  
        
      Customer: $First Name$ $Last Name$  
      Summary: $Description$  
      Priority: $Priority$  
        
      Thank you,  
      Remedy
   6. Uncheck the **AR Task** and **Web URL** shortcuts.
   7. Click **OK.**

**Configuring the Milestone Action Templates (continued)**

1. Click **Create** again.
2. In the pop-up window, choose **RequestBased**, then **Incident**, then **Alert or Email** for the three drop-down menus. Click **OK.**
3. Enter the following data into the fields:
   1. **Title**\*:PGDS Resolution Notification 75% – No Assignee
   2. **Delivery Method** = Email
   3. **To\*** = $Assigned Group$
   4. **Subject** = Incident $Incident Number$ has not been resolved.
   5. **Message**\* =   
        
      Greetings $Assigned Group$,  
        
      Incident $Incident Number$ has not been resolved and is in danger of breaching the Resolution OLA. Please ensure this is resolved as soon as possible.  
        
      Customer: $First Name$ $Last Name$  
      Summary: $Description$  
      Priority: $Priority$  
        
      Thank you,  
      Remedy
   6. Uncheck the **AR Task** and **Web URL** shortcuts.
   7. Click **OK.**

**Creating the Service Targets 1/10**

1. Go to the Service Level Management Console by clicking the **Applications** bar on the far left of the screen, then **Service Level Management**, then **Service Level Management Console**.
2. Expand the Folders panel on the left, and click the **PGDS** folder to highlight it.
3. In the main Service Level Management Console area, click the **Service Targets** tab.
4. Click the **Create** button.
5. In the **Step 1 of 4** Tab, enter the following data into the fields:
   1. **Title\*** = Assignment – Critical Major Incident PGDS
   2. **Applies To\*** = Incident
   3. **Goal Type\*** = Incident Assignment Time
   4. **Terms and Conditions\***
      1. Click the **Define** button.
      2. Click the **Advanced** radio button.
      3. Click the **Custom Qualification** checkbox in the lower-right corner of the window. Click **Yes** on the box that pops up.
      4. Use the Fields, Operators and Keywords drop-downs to enter the following data into the field. Alternatively, you can copy/paste the following into the field:  
           
         'Priority' = "Critical" AND 'PGDS\_Major\_Incident' = "Yes" AND 'Service Type' != "User Service Request"

**NOTE:** If you use the Fields drop-down to pick the fields, the fields will be labeled **Priority\*, Major Incident,** and **Incident Type\***. When you select them from the drop-down, the proper database name will be populated into the field.

* + 1. Click **OK,** then click **Save.** You should now be back on the Step 1 of 4 tab, and your Terms and Conditions should be filled in.
  1. Click the **Advanced** radio button in the upper-right corner of the Step 1 of 4 tab.
  2. Change **Agreement Type** to Operational Level Agreement.

**Creating the Service Targets 1/10 (continued)**

* 1. If you want these to be disabled when you enter them in, choose a **Status\*** of Disabled. Otherwise, choose Enabled.
  2. The **Effective From\*** date is likely populated with the date/time when you first opened the Step 1 of 4 tab. If you’re going to Disable the Service Target, you can leave this date as it is. If you’re going to Enable it and we don’t want this counting anything until Monday, enter **11/21/2016 8:00:00 AM** (or another appropriate date) here.
  3. Click **Next**.

1. In the **Step 2 of 4** Tab, enter the following data into the fields:
   1. Click the **Advanced** radio button.
   2. Enter **15** into the **Minutes\*** field.
   3. Uncheck the **Use Start Time as defined on the Application Form** checkbox.
   4. We’ll be leaving the Business Entity field blank for this Service Target. This is the field that controls whether the Service Target adheres to business hours.
   5. Click **Next.**
2. In the **Step 3 of 4** Tab, enter the following data into the fields:
   1. Click the **Advanced** radio button.
   2. In the **Use Template For Measurement Criteria** section, click the drop-down arrow to the right of the Select field, and choose **PGDS Incident Assignment OLA Measurement.** When you choose this, the **Start When\*, Stop When\*** and **Exclude** fields should become populated with data.
   3. Ensure the **Link to this template** checkbox is checked (it should be by default.)
   4. Ensure the **Reset Goal for Same Request?** field says **Yes.**
   5. Ensure the **Allow Service Target to Re-Open?** field says **No.**
   6. Click **Next.**
3. In the **Step 4 of 4** Tab, you can add Milestones and Actions to take place when those milestones are reached. This is where we will eventually set up the notifications piece. We will loop back to create these in a later section. Click **Finish**.

**Creating the Service Targets 1/10 (continued)**

1. A box will pop up saying “Do you want to build the rules associated with the Service Target now?”Click **No.**
2. You’ll be brought back to the Service Level Management console. Re-select your PGDS folder on the left, and then click the Service Targets tab from the main portion of the console. You should see your Service Target there. The Build Status should be **Need To Be Built.** This is normal.

**Creating the Service Targets 2/10**

1. Go to the Service Level Management Console by clicking the **Applications** bar on the far left of the screen, then **Service Level Management**, then **Service Level Management Console**.
2. Expand the Folders panel on the left, and click the **PGDS** folder to highlight it.
3. In the main Service Level Management Console area, click the **Service Targets** tab.
4. Click the **Create** button.
5. In the **Step 1 of 4** Tab, enter the following data into the fields:
   1. **Title\*** = Assignment – Critical Incident PGDS
   2. **Applies To\*** = Incident
   3. **Goal Type\*** = Incident Assignment Time
   4. **Terms and Conditions\***
      1. Click the **Define** button.
      2. Click the **Advanced** radio button.
      3. Click the **Custom Qualification** checkbox in the lower-right corner of the window. Click **Yes** on the box that pops up.
      4. Use the Fields, Operators and Keywords drop-downs to enter the following data into the field. Alternatively, you can copy/paste the following into the field:  
           
         'Priority' = "Critical" AND 'PGDS\_Major\_Incident' != "Yes" AND 'Service Type' != "User Service Request"

**NOTE:** If you use the Fields drop-down to pick the fields, the fields will be labeled **Priority\*, Major Incident,** and **Incident Type\***. When you select them from the drop-down, the proper database name will be populated into the field.

* + 1. Click **OK,** then click **Save.** You should now be back on the Step 1 of 4 tab, and your Terms and Conditions should be filled in.
  1. Click the **Advanced** radio button in the upper-right corner of the Step 1 of 4 tab.
  2. Change **Agreement Type** to Operational Level Agreement.

**Creating the Service Targets 2/10 (continued)**

* 1. If you want these to be disabled when you enter them in, choose a **Status\*** of Disabled. Otherwise, choose Enabled.
  2. The **Effective From\*** date is likely populated with the date/time when you first opened the Step 1 of 4 tab. If you’re going to Disable the Service Target, you can leave this date as it is. If you’re going to Enable it and we don’t want this counting anything until Monday, enter **11/21/2016 8:00:00 AM** (or another appropriate date) here.
  3. Click **Next**.

1. In the **Step 2 of 4** Tab, enter the following data into the fields:
   1. Click the **Advanced** radio button.
   2. Enter **30** into the **Minutes\*** field.
   3. Uncheck the **Use Start Time as defined on the Application Form** checkbox.
   4. We’ll be leaving the Business Entity field blank for this Service Target. This is the field that controls whether the Service Target adheres to business hours.
   5. Click **Next.**
2. In the **Step 3 of 4** Tab, enter the following data into the fields:
   1. Click the **Advanced** radio button.
   2. In the **Use Template For Measurement Criteria** section, click the drop-down arrow to the right of the Select field, and choose **PGDS Incident Assignment OLA Measurement.** When you choose this, the **Start When\*, Stop When\*** and **Exclude** fields should become populated with data.
   3. Ensure the **Link to this template** checkbox is checked (it should be by default.)
   4. Ensure the **Reset Goal for Same Request?** field says **Yes.**
   5. Ensure the **Allow Service Target to Re-Open?** field says **No.**
   6. Click **Next.**
3. In the **Step 4 of 4** Tab, you can add Milestones and Actions to take place when those milestones are reached. This is where we will eventually set up the notifications piece. We will loop back to create these in a later section. Click **Finish**.

**Creating the Service Targets 2/10 (continued)**

1. A box will pop up saying “Do you want to build the rules associated with the Service Target now?”Click **No.**
2. You’ll be brought back to the Service Level Management console. Re-select your PGDS folder on the left, and then click the Service Targets tab from the main portion of the console. You should see your Service Target there. The Build Status should be **Need To Be Built.** This is normal.

**Creating the Service Targets 3/10**

1. Go to the Service Level Management Console by clicking the **Applications** bar on the far left of the screen, then **Service Level Management**, then **Service Level Management Console**.
2. Expand the Folders panel on the left, and click the **PGDS** folder to highlight it.
3. In the main Service Level Management Console area, click the **Service Targets** tab.
4. Click the **Create** button.
5. In the **Step 1 of 4** Tab, enter the following data into the fields:
   1. **Title\*** = Assignment – High Incident PGDS
   2. **Applies To\*** = Incident
   3. **Goal Type\*** = Incident Assignment Time
   4. **Terms and Conditions\***
      1. Click the **Define** button.
      2. Click the **Advanced** radio button.
      3. Click the **Custom Qualification** checkbox in the lower-right corner of the window. Click **Yes** on the box that pops up.
      4. Use the Fields, Operators and Keywords drop-downs to enter the following data into the field. Alternatively, you can copy/paste the following into the field:  
           
         'Priority' = "High" AND 'Service Type' != "User Service Request"

**NOTE:** If you use the Fields drop-down to pick the fields, the fields will be labeled **Priority\*** and **Incident Type\***. When you select them from the drop-down, the proper database name will be populated into the field.

* + 1. Click **OK,** then click **Save.** You should now be back on the Step 1 of 4 tab, and your Terms and Conditions should be filled in.
  1. Click the **Advanced** radio button in the upper-right corner of the Step 1 of 4 tab.
  2. Change **Agreement Type** to Operational Level Agreement.

**Creating the Service Targets 3/10 (continued)**

* 1. If you want these to be disabled when you enter them in, choose a **Status\*** of Disabled. Otherwise, choose Enabled.
  2. The **Effective From\*** date is likely populated with the date/time when you first opened the Step 1 of 4 tab. If you’re going to Disable the Service Target, you can leave this date as it is. If you’re going to Enable it and we don’t want this counting anything until Monday, enter **11/21/2016 8:00:00 AM** (or another appropriate date) here.
  3. Click **Next**.

1. In the **Step 2 of 4** Tab, enter the following data into the fields:
   1. Click the **Advanced** radio button.
   2. Enter **1** into the **Hours\*** field.
   3. Uncheck the **Use Start Time as defined on the Application Form** checkbox.
   4. We’ll be leaving the Business Entity field blank for this Service Target. This is the field that controls whether the Service Target adheres to business hours.
   5. Click **Next.**
2. In the **Step 3 of 4** Tab, enter the following data into the fields:
   1. Click the **Advanced** radio button.
   2. In the **Use Template For Measurement Criteria** section, click the drop-down arrow to the right of the Select field, and choose **PGDS Incident Assignment OLA Measurement.** When you choose this, the **Start When\*, Stop When\*** and **Exclude** fields should become populated with data.
   3. Ensure the **Link to this template** checkbox is checked (it should be by default.)
   4. Ensure the **Reset Goal for Same Request?** field says **Yes.**
   5. Ensure the **Allow Service Target to Re-Open?** field says **No.**
   6. Click **Next.**
3. In the **Step 4 of 4** Tab, you can add Milestones and Actions to take place when those milestones are reached. This is where we will eventually set up the notifications piece. We will loop back to create these in a later section. Click **Finish**.

**Creating the Service Targets 3/10 (continued)**

1. A box will pop up saying “Do you want to build the rules associated with the Service Target now?”Click **No.**
2. You’ll be brought back to the Service Level Management console. Re-select your PGDS folder on the left, and then click the Service Targets tab from the main portion of the console. You should see your Service Target there. The Build Status should be **Need To Be Built.** This is normal.

**Creating the Service Targets 4/10**

1. Go to the Service Level Management Console by clicking the **Applications** bar on the far left of the screen, then **Service Level Management**, then **Service Level Management Console**.
2. Expand the Folders panel on the left, and click the **PGDS** folder to highlight it.
3. In the main Service Level Management Console area, click the **Service Targets** tab.
4. Click the **Create** button.
5. In the **Step 1 of 4** Tab, enter the following data into the fields:
   1. **Title\*** = Assignment – Medium Incident PGDS
   2. **Applies To\*** = Incident
   3. **Goal Type\*** = Incident Assignment Time
   4. **Terms and Conditions\***
      1. Click the **Define** button.
      2. Click the **Advanced** radio button.
      3. Click the **Custom Qualification** checkbox in the lower-right corner of the window. Click **Yes** on the box that pops up.
      4. Use the Fields, Operators and Keywords drop-downs to enter the following data into the field. Alternatively, you can copy/paste the following into the field:  
           
         'Priority' = "Medium" AND 'Service Type' != "User Service Request"

**NOTE:** If you use the Fields drop-down to pick the fields, the fields will be labeled **Priority\*** and **Incident Type\***. When you select them from the drop-down, the proper database name will be populated into the field.

* + 1. Click **OK,** then click **Save.** You should now be back on the Step 1 of 4 tab, and your Terms and Conditions should be filled in.
  1. Click the **Advanced** radio button in the upper-right corner of the Step 1 of 4 tab.
  2. Change **Agreement Type** to Operational Level Agreement.

**Creating the Service Targets 4/10 (continued)**

* 1. If you want these to be disabled when you enter them in, choose a **Status\*** of Disabled. Otherwise, choose Enabled.
  2. The **Effective From\*** date is likely populated with the date/time when you first opened the Step 1 of 4 tab. If you’re going to Disable the Service Target, you can leave this date as it is. If you’re going to Enable it and we don’t want this counting anything until Monday, enter **11/21/2016 8:00:00 AM** (or another appropriate date) here.
  3. Click **Next**.

1. In the **Step 2 of 4** Tab, enter the following data into the fields:
   1. Click the **Advanced** radio button.
   2. Enter **9** into the **Hours\*** field.
   3. Uncheck the **Use Start Time as defined on the Application Form** checkbox.
   4. Click the drop-down arrow next to **Business Entity** and choose **PGDS OLA – Business Hours.**
   5. Click **Next.**
2. In the **Step 3 of 4** Tab, enter the following data into the fields:
   1. Click the **Advanced** radio button.
   2. In the **Use Template For Measurement Criteria** section, click the drop-down arrow to the right of the Select field, and choose **PGDS Incident Assignment OLA Measurement.** When you choose this, the **Start When\*, Stop When\*** and **Exclude** fields should become populated with data.
   3. Ensure the **Link to this template** checkbox is checked (it should be by default.)
   4. Ensure the **Reset Goal for Same Request?** field says **Yes.**
   5. Ensure the **Allow Service Target to Re-Open?** field says **No.**
   6. Click **Next.**
3. In the **Step 4 of 4** Tab, you can add Milestones and Actions to take place when those milestones are reached. This is where we will eventually set up the notifications piece. We will loop back to create these in a later section. Click **Finish**.

**Creating the Service Targets 4/10 (continued)**

1. A box will pop up saying “Do you want to build the rules associated with the Service Target now?”Click **No.**
2. You’ll be brought back to the Service Level Management console. Re-select your PGDS folder on the left, and then click the Service Targets tab from the main portion of the console. You should see your Service Target there. The Build Status should be **Need To Be Built.** This is normal.

**Creating the Service Targets 5/10**

1. Go to the Service Level Management Console by clicking the **Applications** bar on the far left of the screen, then **Service Level Management**, then **Service Level Management Console**.
2. Expand the Folders panel on the left, and click the **PGDS** folder to highlight it.
3. In the main Service Level Management Console area, click the **Service Targets** tab.
4. Click the **Create** button.
5. In the **Step 1 of 4** Tab, enter the following data into the fields:
   1. **Title\*** = Assignment – Low Incident PGDS
   2. **Applies To\*** = Incident
   3. **Goal Type\*** = Incident Assignment Time
   4. **Terms and Conditions\***
      1. Click the **Define** button.
      2. Click the **Advanced** radio button.
      3. Click the **Custom Qualification** checkbox in the lower-right corner of the window. Click **Yes** on the box that pops up.
      4. Use the Fields, Operators and Keywords drop-downs to enter the following data into the field. Alternatively, you can copy/paste the following into the field:  
           
         'Priority' = "Low” AND 'Service Type' != "User Service Request"

**NOTE:** If you use the Fields drop-down to pick the fields, the fields will be labeled **Priority\*** and **Incident Type\***. When you select them from the drop-down, the proper database name will be populated into the field.

* + 1. Click **OK,** then click **Save.** You should now be back on the Step 1 of 4 tab, and your Terms and Conditions should be filled in.
  1. Click the **Advanced** radio button in the upper-right corner of the Step 1 of 4 tab.
  2. Change **Agreement Type** to Operational Level Agreement.

**Creating the Service Targets 5/10 (continued)**

* 1. If you want these to be disabled when you enter them in, choose a **Status\*** of Disabled. Otherwise, choose Enabled.
  2. The **Effective From\*** date is likely populated with the date/time when you first opened the Step 1 of 4 tab. If you’re going to Disable the Service Target, you can leave this date as it is. If you’re going to Enable it and we don’t want this counting anything until Monday, enter **11/21/2016 8:00:00 AM** (or another appropriate date) here.
  3. Click **Next**.

1. In the **Step 2 of 4** Tab, enter the following data into the fields:
   1. Click the **Advanced** radio button.
   2. Enter **18** into the **Hours\*** field.
   3. Uncheck the **Use Start Time as defined on the Application Form** checkbox.
   4. Click the drop-down arrow next to **Business Entity** and choose **PGDS OLA – Business Hours.**
   5. Click **Next.**
2. In the **Step 3 of 4** Tab, enter the following data into the fields:
   1. Click the **Advanced** radio button.
   2. In the **Use Template For Measurement Criteria** section, click the drop-down arrow to the right of the Select field, and choose **PGDS Incident Assignment OLA Measurement.** When you choose this, the **Start When\*, Stop When\*** and **Exclude** fields should become populated with data.
   3. Ensure the **Link to this template** checkbox is checked (it should be by default.)
   4. Ensure the **Reset Goal for Same Request?** field says **Yes.**
   5. Ensure the **Allow Service Target to Re-Open?** field says **No.**
   6. Click **Next.**
3. In the **Step 4 of 4** Tab, you can add Milestones and Actions to take place when those milestones are reached. This is where we will eventually set up the notifications piece. We will loop back to create these in a later section. Click **Finish**.

**Creating the Service Targets 5/10 (continued)**

1. A box will pop up saying “Do you want to build the rules associated with the Service Target now?”Click **No.**
2. You’ll be brought back to the Service Level Management console. Re-select your PGDS folder on the left, and then click the Service Targets tab from the main portion of the console. You should see your Service Target there. The Build Status should be **Need To Be Built.** This is normal.

**Creating the Service Targets 6/10**

1. Go to the Service Level Management Console by clicking the **Applications** bar on the far left of the screen, then **Service Level Management**, then **Service Level Management Console**.
2. Expand the Folders panel on the left, and click the **PGDS** folder to highlight it.
3. In the main Service Level Management Console area, click the **Service Targets** tab.
4. Click the **Create** button.
5. In the **Step 1 of 4** Tab, enter the following data into the fields:
   1. **Title\*** = Resolution – Critical Major Incident PGDS
   2. **Applies To\*** = Incident
   3. **Goal Type\*** = Incident Resolution Time
   4. **Terms and Conditions\***
      1. Click the **Define** button.
      2. Click the **Advanced** radio button.
      3. Click the **Custom Qualification** checkbox in the lower-right corner of the window. Click **Yes** on the box that pops up.
      4. Use the Fields, Operators and Keywords drop-downs to enter the following data into the field. Alternatively, you can copy/paste the following into the field:  
           
         'Priority' = "Critical" AND 'PGDS\_Major\_Incident' = "Yes" AND 'Service Type' != "User Service Request"

**NOTE:** If you use the Fields drop-down to pick the fields, the fields will be labeled **Priority\*, Major Incident,** and **Incident Type\***. When you select them from the drop-down, the proper database name will be populated into the field.

* + 1. Click **OK,** then click **Save.** You should now be back on the Step 1 of 4 tab, and your Terms and Conditions should be filled in.
  1. Click the **Advanced** radio button in the upper-right corner of the Step 1 of 4 tab.
  2. Change **Agreement Type** to Operational Level Agreement.

**Creating the Service Targets 6/10 (continued)**

* 1. If you want these to be disabled when you enter them in, choose a **Status\*** of Disabled. Otherwise, choose Enabled.
  2. The **Effective From\*** date is likely populated with the date/time when you first opened the Step 1 of 4 tab. If you’re going to Disable the Service Target, you can leave this date as it is. If you’re going to Enable it and we don’t want this counting anything until Monday, enter **11/21/2016 8:00:00 AM** (or another appropriate date) here.
  3. Click **Next**.

1. In the **Step 2 of 4** Tab, enter the following data into the fields:
   1. Click the **Advanced** radio button.
   2. Enter **2** into the **Hours\*** field.
   3. Uncheck the **Use Start Time as defined on the Application Form** checkbox.
   4. We’ll be leaving the Business Entity field blank for this Service Target. This is the field that controls whether the Service Target adheres to business hours.
   5. Click **Next.**
2. In the **Step 3 of 4** Tab, enter the following data into the fields:
   1. Click the **Advanced** radio button.
   2. In the **Use Template For Measurement Criteria** section, click the drop-down arrow to the right of the Select field, and choose **PGDS Incident Resolution OLA Measurement.** When you choose this, the **Start When\*, Stop When\*** and **Exclude** fields should become populated with data.
   3. Ensure the **Link to this template** checkbox is checked (it should be by default.)
   4. Ensure the **Reset Goal for Same Request?** field says **Yes.**
   5. Ensure the **Allow Service Target to Re-Open?** field says **No.**
   6. Click **Next.**
3. In the **Step 4 of 4** Tab, you can add Milestones and Actions to take place when those milestones are reached. This is where we will eventually set up the notifications piece. We will loop back to create these in a later section. Click **Finish**.

**Creating the Service Targets 6/10 (continued)**

1. A box will pop up saying “Do you want to build the rules associated with the Service Target now?”Click **No.**
2. You’ll be brought back to the Service Level Management console. Re-select your PGDS folder on the left, and then click the Service Targets tab from the main portion of the console. You should see your Service Target there. The Build Status should be **Need To Be Built.** This is normal.

**Creating the Service Targets 7/10**

1. Go to the Service Level Management Console by clicking the **Applications** bar on the far left of the screen, then **Service Level Management**, then **Service Level Management Console**.
2. Expand the Folders panel on the left, and click the **PGDS** folder to highlight it.
3. In the main Service Level Management Console area, click the **Service Targets** tab.
4. Click the **Create** button.
5. In the **Step 1 of 4** Tab, enter the following data into the fields:
   1. **Title\*** = Resolution – Critical Incident PGDS
   2. **Applies To\*** = Incident
   3. **Goal Type\*** = Incident Resolution Time
   4. **Terms and Conditions\***
      1. Click the **Define** button.
      2. Click the **Advanced** radio button.
      3. Click the **Custom Qualification** checkbox in the lower-right corner of the window. Click **Yes** on the box that pops up.
      4. Use the Fields, Operators and Keywords drop-downs to enter the following data into the field. Alternatively, you can copy/paste the following into the field:  
           
         'Priority' = "Critical" AND 'PGDS\_Major\_Incident' != "Yes" AND 'Service Type' != "User Service Request"

**NOTE:** If you use the Fields drop-down to pick the fields, the fields will be labeled **Priority\*, Major Incident,** and **Incident Type\***. When you select them from the drop-down, the proper database name will be populated into the field.

* + 1. Click **OK,** then click **Save.** You should now be back on the Step 1 of 4 tab, and your Terms and Conditions should be filled in.
  1. Click the **Advanced** radio button in the upper-right corner of the Step 1 of 4 tab.
  2. Change **Agreement Type** to Operational Level Agreement.

**Creating the Service Targets 7/10 (continued)**

* 1. If you want these to be disabled when you enter them in, choose a **Status\*** of Disabled. Otherwise, choose Enabled.
  2. The **Effective From\*** date is likely populated with the date/time when you first opened the Step 1 of 4 tab. If you’re going to Disable the Service Target, you can leave this date as it is. If you’re going to Enable it and we don’t want this counting anything until Monday, enter **11/21/2016 8:00:00 AM** (or another appropriate date) here.
  3. Click **Next**.

1. In the **Step 2 of 4** Tab, enter the following data into the fields:
   1. Click the **Advanced** radio button.
   2. Enter **3** into the **Hours\*** field.
   3. Uncheck the **Use Start Time as defined on the Application Form** checkbox.
   4. We’ll be leaving the Business Entity field blank for this Service Target. This is the field that controls whether the Service Target adheres to business hours.
   5. Click **Next.**
2. In the **Step 3 of 4** Tab, enter the following data into the fields:
   1. Click the **Advanced** radio button.
   2. In the **Use Template For Measurement Criteria** section, click the drop-down arrow to the right of the Select field, and choose **PGDS Incident Resolution OLA Measurement.** When you choose this, the **Start When\*, Stop When\*** and **Exclude** fields should become populated with data.
   3. Ensure the **Link to this template** checkbox is checked (it should be by default.)
   4. Ensure the **Reset Goal for Same Request?** field says **Yes.**
   5. Ensure the **Allow Service Target to Re-Open?** field says **No.**
   6. Click **Next.**
3. In the **Step 4 of 4** Tab, you can add Milestones and Actions to take place when those milestones are reached. This is where we will eventually set up the notifications piece. We will loop back to create these in a later section. Click **Finish**.

**Creating the Service Targets 7/10 (continued)**

1. A box will pop up saying “Do you want to build the rules associated with the Service Target now?”Click **No.**
2. You’ll be brought back to the Service Level Management console. Re-select your PGDS folder on the left, and then click the Service Targets tab from the main portion of the console. You should see your Service Target there. The Build Status should be **Need To Be Built.** This is normal.

**Creating the Service Targets 8/10**

1. Go to the Service Level Management Console by clicking the **Applications** bar on the far left of the screen, then **Service Level Management**, then **Service Level Management Console**.
2. Expand the Folders panel on the left, and click the **PGDS** folder to highlight it.
3. In the main Service Level Management Console area, click the **Service Targets** tab.
4. Click the **Create** button.
5. In the **Step 1 of 4** Tab, enter the following data into the fields:
   1. **Title\*** = Resolution – High Incident PGDS
   2. **Applies To\*** = Incident
   3. **Goal Type\*** = Incident Resolution Time
   4. **Terms and Conditions\***
      1. Click the **Define** button.
      2. Click the **Advanced** radio button.
      3. Click the **Custom Qualification** checkbox in the lower-right corner of the window. Click **Yes** on the box that pops up.
      4. Use the Fields, Operators and Keywords drop-downs to enter the following data into the field. Alternatively, you can copy/paste the following into the field:  
           
         'Priority' = "High” AND 'Service Type' != "User Service Request"

**NOTE:** If you use the Fields drop-down to pick the fields, the fields will be labeled **Priority\*** and **Incident Type\***. When you select them from the drop-down, the proper database name will be populated into the field.

* + 1. Click **OK,** then click **Save.** You should now be back on the Step 1 of 4 tab, and your Terms and Conditions should be filled in.
  1. Click the **Advanced** radio button in the upper-right corner of the Step 1 of 4 tab.
  2. Change **Agreement Type** to Operational Level Agreement.

**Creating the Service Targets 8/10 (continued)**

* 1. If you want these to be disabled when you enter them in, choose a **Status\*** of Disabled. Otherwise, choose Enabled.
  2. The **Effective From\*** date is likely populated with the date/time when you first opened the Step 1 of 4 tab. If you’re going to Disable the Service Target, you can leave this date as it is. If you’re going to Enable it and we don’t want this counting anything until Monday, enter **11/21/2016 8:00:00 AM** (or another appropriate date) here.
  3. Click **Next**.

1. In the **Step 2 of 4** Tab, enter the following data into the fields:
   1. Click the **Advanced** radio button.
   2. Enter **6** into the **Hours\*** field.
   3. Uncheck the **Use Start Time as defined on the Application Form** checkbox.
   4. We’ll be leaving the Business Entity field blank for this Service Target. This is the field that controls whether the Service Target adheres to business hours.
   5. Click **Next.**
2. In the **Step 3 of 4** Tab, enter the following data into the fields:
   1. Click the **Advanced** radio button.
   2. In the **Use Template For Measurement Criteria** section, click the drop-down arrow to the right of the Select field, and choose **PGDS Incident Resolution OLA Measurement.** When you choose this, the **Start When\*, Stop When\*** and **Exclude** fields should become populated with data.
   3. Ensure the **Link to this template** checkbox is checked (it should be by default.)
   4. Ensure the **Reset Goal for Same Request?** field says **Yes.**
   5. Ensure the **Allow Service Target to Re-Open?** field says **No.**
   6. Click **Next.**
3. In the **Step 4 of 4** Tab, you can add Milestones and Actions to take place when those milestones are reached. This is where we will eventually set up the notifications piece. We will loop back to create these in a later section. Click **Finish**.

**Creating the Service Targets 8/10 (continued)**

1. A box will pop up saying “Do you want to build the rules associated with the Service Target now?”Click **No.**
2. You’ll be brought back to the Service Level Management console. Re-select your PGDS folder on the left, and then click the Service Targets tab from the main portion of the console. You should see your Service Target there. The Build Status should be **Need To Be Built.** This is normal.

**Creating the Service Targets 9/10**

1. Go to the Service Level Management Console by clicking the **Applications** bar on the far left of the screen, then **Service Level Management**, then **Service Level Management Console**.
2. Expand the Folders panel on the left, and click the **PGDS** folder to highlight it.
3. In the main Service Level Management Console area, click the **Service Targets** tab.
4. Click the **Create** button.
5. In the **Step 1 of 4** Tab, enter the following data into the fields:
   1. **Title\*** = Resolution – Medium Incident PGDS
   2. **Applies To\*** = Incident
   3. **Goal Type\*** = Incident Resolution Time
   4. **Terms and Conditions\***
      1. Click the **Define** button.
      2. Click the **Advanced** radio button.
      3. Click the **Custom Qualification** checkbox in the lower-right corner of the window. Click **Yes** on the box that pops up.
      4. Use the Fields, Operators and Keywords drop-downs to enter the following data into the field. Alternatively, you can copy/paste the following into the field:  
           
         'Priority' = "Medium" AND 'Service Type' != "User Service Request"

**NOTE:** If you use the Fields drop-down to pick the fields, the fields will be labeled **Priority\*** and **Incident Type\***. When you select them from the drop-down, the proper database name will be populated into the field.

* + 1. Click **OK,** then click **Save.** You should now be back on the Step 1 of 4 tab, and your Terms and Conditions should be filled in.
  1. Click the **Advanced** radio button in the upper-right corner of the Step 1 of 4 tab.
  2. Change **Agreement Type** to Operational Level Agreement.

**Creating the Service Targets 9/10 (continued)**

* 1. If you want these to be disabled when you enter them in, choose a **Status\*** of Disabled. Otherwise, choose Enabled.
  2. The **Effective From\*** date is likely populated with the date/time when you first opened the Step 1 of 4 tab. If you’re going to Disable the Service Target, you can leave this date as it is. If you’re going to Enable it and we don’t want this counting anything until Monday, enter **11/21/2016 8:00:00 AM** (or another appropriate date) here.
  3. Click **Next**.

1. In the **Step 2 of 4** Tab, enter the following data into the fields:
   1. Click the **Advanced** radio button.
   2. Enter **27** into the **Hours\*** field.
   3. Uncheck the **Use Start Time as defined on the Application Form** checkbox.
   4. Click the drop-down arrow next to **Business Entity** and choose **PGDS OLA – Business Hours.**
   5. Click **Next.**
2. In the **Step 3 of 4** Tab, enter the following data into the fields:
   1. Click the **Advanced** radio button.
   2. In the **Use Template For Measurement Criteria** section, click the drop-down arrow to the right of the Select field, and choose **PGDS Incident Resolution OLA Measurement.** When you choose this, the **Start When\*, Stop When\*** and **Exclude** fields should become populated with data.
   3. Ensure the **Link to this template** checkbox is checked (it should be by default.)
   4. Ensure the **Reset Goal for Same Request?** field says **Yes.**
   5. Ensure the **Allow Service Target to Re-Open?** field says **No.**
   6. Click **Next.**
3. In the **Step 4 of 4** Tab, you can add Milestones and Actions to take place when those milestones are reached. This is where we will eventually set up the notifications piece. We will loop back to create these in a later section. Click **Finish**.

**Creating the Service Targets 9/10 (continued)**

1. A box will pop up saying “Do you want to build the rules associated with the Service Target now?”Click **No.**
2. You’ll be brought back to the Service Level Management console. Re-select your PGDS folder on the left, and then click the Service Targets tab from the main portion of the console. You should see your Service Target there. The Build Status should be **Need To Be Built.** This is normal.

**Creating the Service Targets 10/10**

1. Go to the Service Level Management Console by clicking the **Applications** bar on the far left of the screen, then **Service Level Management**, then **Service Level Management Console**.
2. Expand the Folders panel on the left, and click the **PGDS** folder to highlight it.
3. In the main Service Level Management Console area, click the **Service Targets** tab.
4. Click the **Create** button.
5. In the **Step 1 of 4** Tab, enter the following data into the fields:
   1. **Title\*** = Resolution – Low Incident PGDS
   2. **Applies To\*** = Incident
   3. **Goal Type\*** = Incident Resolution Time
   4. **Terms and Conditions\***
      1. Click the **Define** button.
      2. Click the **Advanced** radio button.
      3. Click the **Custom Qualification** checkbox in the lower-right corner of the window. Click **Yes** on the box that pops up.
      4. Use the Fields, Operators and Keywords drop-downs to enter the following data into the field. Alternatively, you can copy/paste the following into the field:  
           
         'Priority' = "Low" AND 'Service Type' != "User Service Request"

**NOTE:** If you use the Fields drop-down to pick the fields, the fields will be labeled **Priority\*** and **Incident Type\***. When you select them from the drop-down, the proper database name will be populated into the field.

* + 1. Click **OK,** then click **Save.** You should now be back on the Step 1 of 4 tab, and your Terms and Conditions should be filled in.
  1. Click the **Advanced** radio button in the upper-right corner of the Step 1 of 4 tab.
  2. Change **Agreement Type** to Operational Level Agreement.

**Creating the Service Targets 10/10 (continued)**

* 1. If you want these to be disabled when you enter them in, choose a **Status\*** of Disabled. Otherwise, choose Enabled.
  2. The **Effective From\*** date is likely populated with the date/time when you first opened the Step 1 of 4 tab. If you’re going to Disable the Service Target, you can leave this date as it is. If you’re going to Enable it and we don’t want this counting anything until Monday, enter **11/21/2016 8:00:00 AM** (or another appropriate date) here.
  3. Click **Next**.

1. In the **Step 2 of 4** Tab, enter the following data into the fields:
   1. Click the **Advanced** radio button.
   2. Enter **45** into the **Hours\*** field.
   3. Uncheck the **Use Start Time as defined on the Application Form** checkbox.
   4. Click the drop-down arrow next to **Business Entity** and choose **PGDS OLA – Business Hours.**
   5. Click **Next.**
2. In the **Step 3 of 4** Tab, enter the following data into the fields:
   1. Click the **Advanced** radio button.
   2. In the **Use Template For Measurement Criteria** section, click the drop-down arrow to the right of the Select field, and choose **PGDS Incident Resolution OLA Measurement.** When you choose this, the **Start When\*, Stop When\*** and **Exclude** fields should become populated with data.
   3. Ensure the **Link to this template** checkbox is checked (it should be by default.)
   4. Ensure the **Reset Goal for Same Request?** field says **Yes.**
   5. Ensure the **Allow Service Target to Re-Open?** field says **No.**
   6. Click **Next.**
3. In the **Step 4 of 4** Tab, you can add Milestones and Actions to take place when those milestones are reached. This is where we will eventually set up the notifications piece. We will loop back to create these in a later section. Click **Finish**.

**Creating the Service Targets 10/10 (continued)**

1. A box will pop up saying “Do you want to build the rules associated with the Service Target now?”Click **No.**
2. You’ll be brought back to the Service Level Management console. Re-select your PGDS folder on the left, and then click the Service Targets tab from the main portion of the console. You should see your Service Target there. The Build Status should be **Need To Be Built.** This is normal.

**Creating the Agreements 1/2**

1. Go to the Service Level Management Console by clicking the **Applications** bar on the far left of the screen, then **Service Level Management**, then **Service Level Management Console**.
2. Expand the Folders panel on the left, and click the **PGDS** folder to highlight it.
3. In the main Service Level Management Console area, click the **Agreements** tab.
4. Click **Create** to create a new Agreement.
5. Enter the following data into the fields:
   1. **Title\*** = PGDS Incident Assignment OLA
   2. **Expiration Date** = 12/31/2020 12:00:00 AM
   3. **Notification Date** = 10/31/2020 12:00:00 AM
   4. **Agreement Type** = Operational Level Agreement
   5. **Status** = Enabled
6. On the **Related Service Targets** tab, enter the following data into the fields:
   1. **Compliance Target\*** = 90.00%
   2. **Compliance at Risk** = 93.00%  
        
      **NOTE:** These are basically placeholder numbers – Jeff and/or others may have different numbers they want to use for compliance percentages. They may also do reporting using Analytics or another reporting tool.
7. On the **Related Service Targets** tab, click the **Relate** button.
8. In the window that popped up, type **Assignment** into the **Title** field, then click **Search**. The five Assignment Service Targets you created earlier should show up.
9. Click the top-most record, then hold down your Shift key, then select the bottom-most record, then release the Shift key. All five records should now be selected. Click the **Relate Selected Record** button.
10. The pop-up should close and you’ll be back to the main Agreement window. All five Service Targets you selected should be visible in the Related Service Targets table.
11. Click the **Update Percentage** button. The table should update the **Weighted %** value for each row. It should show 20% for each. **NOTE:** Relative weights for the different service targets were not discussed, so as a default, we are weighting all the targets equally.
12. Click **Save**. You should be returned to the Service Level Management console.

**Creating the Agreements 2/2**

1. Go to the Service Level Management Console by clicking the **Applications** bar on the far left of the screen, then **Service Level Management**, then **Service Level Management Console**.
2. Expand the Folders panel on the left, and click the **PGDS** folder to highlight it.
3. In the main Service Level Management Console area, click the **Agreements** tab.
4. Click **Create** to create a new Agreement.
5. Enter the following data into the fields:
   1. **Title\*** = PGDS Incident Resolution OLA
   2. **Expiration Date** = 12/31/2020 12:00:00 AM
   3. **Notification Date** = 10/31/2020 12:00:00 AM
   4. **Agreement Type** = Operational Level Agreement
   5. **Status** = Enabled
6. On the **Related Service Targets** tab, enter the following data into the fields:
   1. **Compliance Target\*** = 90.00%
   2. **Compliance at Risk** = 93.00%  
        
      **NOTE:** These are basically placeholder numbers – Jeff and/or others may have different numbers they want to use for compliance percentages. They may also do reporting using Analytics or another reporting tool.
7. On the **Related Service Targets** tab, click the **Relate** button.
8. In the window that popped up, type **Resolution** into the **Title** field, then click **Search**. The five Resolution Service Targets you created earlier should show up.
9. Click the top-most record, then hold down your Shift key, then select the bottom-most record, then release the Shift key. All five records should now be selected. Click the **Relate Selected Record** button.
10. The pop-up should close and you’ll be back to the main Agreement window. All five Service Targets you selected should be visible in the Related Service Targets table.
11. Click the **Update Percentage** button. The table should update the **Weighted %** value for each row. It should show 20% for each. **NOTE:** Relative weights for the different service targets were not discussed, so as a default, we are weighting all the targets equally.
12. Click **Save**. You should be returned to the Service Level Management console.

**Associating Milestone and Action Templates to Service Targets**

1. Go to the Service Level Management Console by clicking the **Applications** bar on the far left of the screen, then **Service Level Management**, then **Service Level Management Console**.
2. Expand the Folders panel on the left, and click the **PGDS** folder to highlight it.
3. In the main Service Level Management Console area, click the **Service Targets** tab. You should see five Assignment service targets, and five Resolution service targets.
4. **For each of the five Assignment** **service targets,** perform the following steps (a through g):
   1. Highlight the Service Target and click **View**.
   2. Click the **Milestones** tab.
   3. Under the Milestones table, click **Add.**
   4. In the pop-up that appears, choose **Template**, then **PGDS Assignment Milestone 75%.** Click **OK.**
   5. Under the Actions table, click **Add.**
   6. In the pop-up that appears, choose **Template,** then **PGDS Assignment Notification 75%**. Click **OK.**
   7. Click **Save** to save the Service Target. A box will pop up saying “Do you want to build the rules associated with the Service Target now?”Click **Yes.**
5. **For each of the five Resolution service targets,** perform the following steps (a through k):
   1. Highlight the Service Target and click **View.**
   2. Click the **Milestones** tab.
   3. Under the Milestones table, click **Add.**
   4. In the pop-up that appears, choose **Template**, then **PGDS Resolution Milestone 75% - Assignee.** Click **OK.**
   5. Under the Actions table, click **Add.**
   6. In the pop-up that appears, choose **Template,** then **PGDS Resolution Notification 75% - Assignee**. Click **OK.**

**Associating Milestone and Action Templates to Service Targets (continued)**

* 1. Under the Milestones table, click **Add.**
  2. In the pop-up that appears, choose **Template**, then **PGDS Resolution Milestone 75% - No Assignee.** Click **OK.**
  3. Under the Actions table, click **Add.**
  4. In the pop-up that appears, choose **Template,** then **PGDS Resolution Notification 75% - No Assignee**. Click **OK.**
  5. Click **Save** to save the Service Target. A box will pop up saying “Do you want to build the rules associated with the Service Target now?”Click **Yes.**

1. In the main Service Level Management Console area, click the **Service Targets** tab. You should see five Assignment service targets, and five Resolution service targets. Their **Build Status** should all be either **Built Successfully** or **Build in Progress.**  
     
   **NOTE:** If the Build Status for a Service Target is **Could Not Be Built**, try highlighting that Service Target and clicking the **Build** button at the bottom of the table. This will attempt to rebuild the Service Target and should work, if for some reason the initial build fails. If it does not, please contact me (Eric Coughlin)

**You’re done!**

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| **BMC Remedy Deployment**  **Configuration and Workflow Specifications** | |
| **Document Version Control** | |
| **Version 4** | * **Added section for Milestone notifications.** |
| **Version 3** | * **Removed special character names from Service Target that will prevent Milestone creation.** |
| **Version 2** | * **Added text to Business Time Segments section to cover Jackson Holidays for 2016-2017.** |
| **Version 1** | * **Original document.** |