# Create Monthly / Weekly Cycle Jobs Spreadsheet Procedure

Service Level Management

**Purpose**

The Cycle Jobs spreadsheet is used to populate the raw data tabs for Service Operations on the CPI (CPI SOP 1.1 – 1.7) and KPI (KPI SOP 1.8 – 1.47) reports. The data is taken from the Access Database for the *Daily Cycle Status Report*. This procedure should be performed every Thursday for the Weekly CPI and KPI reports, and on the first day of the month for the Monthly CPI and KPI reports.

For more information see:

[Create Daily Cycle Status Report Procedure](https://confluence.jacksonnational.com/display/CPENABLE/01+-+Create+Morning+Cycle+Status+Report+Procedure)

**Related Policy**

* [IT Service Management Policy](https://sharepoint.jackson.com/sites/itsmsd/servicelevelmanagement/Shared%20Documents/Pre%20December%202019/SLM%20Documents/Policy%2C%20Process%2C%20Procedures/SLM_Service%20Level%20Management%20Process.doc?d=wa1eaba53e1dc4b30abda2a0886981cc9)

**Audience**

The following groups are responsible for adhering to this document:

* Service Level Management

**Procedure**

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| Step | Action |
| 1 | Ensure that the Daily Cycle Status Report for the previous Cycle Date has been run.  For more information see:  [Create Daily Cycle Status Report Procedure](https://confluence.jacksonnational.com/display/CPENABLE/01+-+Create+Daily+Cycle+Status+Report+Procedure)   * Monthly: Last day of the previous month’s cycle date. * Weekly: Wednesday’s cycle date. |
| 2 | Open Excel and create a new spreadsheet entitled:   * Monthly: *CPI APP 1.1 - 1.7 Monthly Morning Cycle Report Jobs – Month Year*   Save to the following location:  [O:\share\Service Delivery\Service Level Management\SLA Reporting\Reporting](file:///O:\share\Service%20Delivery\Service%20Level%20Management\SLA%20Reporting\Reporting)\YEAR\Monthly CPI GPI KPI Reports\Month   * Weekly: *Weekly Cycle Jobs MMDDYYYY*   Save to the following location:  [O:\share\Service Delivery\Service Level Management\SLA Reporting\Reporting](file:///O:\share\Service%20Delivery\Service%20Level%20Management\SLA%20Reporting\Reporting)\YEAR\Weekly SLA Report\Month\Current Week’s Folder |
| 3 | Open the Cycle Status Database.accdb file located at:  [O:\share\Service Delivery\Service Level Management\SLA Reporting\Reporting\Report Generators](file:///O:\share\Service%20Delivery\Service%20Level%20Management\SLA%20Reporting\Reporting\Report%20Generators)   1. Under “Custom / Unassigned Objects”, click on “Job\_Data\_For\_Date\_Of\_Cycle”.      1. Click the box before the first cell (“Cycle\_D” column) and drag down through the last row for the Cycle Date of the previous month. This will capture all of the cycle data needed for the CPI and KPI Reports. (Example: If you are working on a Monthly or Weekly report for May, you need to capture the cycle date of April 30th).     ***Note:*** *The last cycle date for the previous month is needed because the majority of jobs that were run with that cycle date did not complete until the first date of the month being reported on.*   1. Paste the data into the spreadsheet that was created in **Step 2**. 2. Cut the “Job\_Name\_X” column and insert it in front of the “Cycle\_D” column. 3. Remove all columns with the exception of the following:  * Job\_Name\_X * Cycle\_D * End\_TS\_AsString * SLA\_TS * Job\_Category\_Desc * App\_Desc * SLA\_Reason\_X        1. Reformat column D (“SLA\_TS”) to Date / Military time.     Data from columns A, B, C, D, and G (when data is present) will be copied and pasted into the raw data tabs of the Weekly CPI and KPI reports, which will build up each week and turn into the Monthly CPI and KPI reports. |

**Modification**

The following associates can make modifications to this document:

* Manager, Service Level Management
* Director, IT Service Management
* Vice President, Service Delivery
* Chief Technology Officer, JET

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| Service Level Management Process | |
| Responsible Party: Sharla Piepkow, Manager, Service Level Management Approving Authority: Rob Kolm, Director, IT Service Management | Date Created: 06/22/2020 Last Modified:  Last Reviewed: |