# Generate Monthly SLA Report Procedure

Service Level Management

**Purpose**

The Monthly SLA Reports are run from the first date of the previous month to the last date of the previous month. Comments and carve-outs will already appear on the detail report, based on the daily review of the SLA Report throughout the previous month.

There are sixteen reports created. A PDF and Excel version of the Monthly Percentage Summary reports for each Service Level Tier (Platinum, Gold, Silver, and Bronze) and the same for the Monthly Applications Detail reports. These reports are used as the raw data for the CPI and KPI reports which are published to Jackson each month.

This procedure should not be started until all of the outages have been addressed for the previous month.

For more information see:

[Working CI Unavailability Record Tickets Procedure](https://confluence.jacksonnational.com/display/CPENABLE/02+-+Working+CI+Unavailability+Record+Tickets+Procedure)

[Manually Monitor Services Procedure](https://confluence.jacksonnational.com/display/CPENABLE/01+-+Manually+Monitor+Services+Procedure)

**Related Policy**

* [IT Service Management Policy](https://sharepoint.jackson.com/sites/integrity/_layouts/15/WopiFrame.aspx?sourcedoc=%7be34fe42a-654a-469a-9d38-6612f00486dc%7d&action=view)

**Audience**

The following groups are responsible for adhering to this document:

* Service Level Management

**Procedure**

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| Step | Action |
| 1 | **Access Remedy at the following location:** <https://remedy.jacksonnational.com/arsys/>   1. Expand the “Applications” tab on the side of the screen.      1. Select “Smart Reporting”. 2. Select “Smart Reporting Console”. 3. Select the “Service Delivery” folder.      1. Select the “Service Level Management” folder.      1. A list of reports and dashboards will appear. Double click each report (one at a time) to open the report.   There are four “Monthly SLA Percentage Reports” – one for each Service Level Tier (Platinum, Gold, Silver, and Bronze) . Double click on one of the reports to open. These four reports represent the accurate monthly percentage for the month as the percentage is calculated by row.          There are four “SLA Monthly Reports” (featuring the details of each day of the month, including comments and carve-outs). These reports feature a monthly percentage at the bottom, but it is calculated by column and should not be used for the official monthly percentages.           1. The SLA Percentage Report will appear on the screen.      1. Continue to Step 2 to set up the date range of the Monthly SLA Report upon creating the first draft. |
| 2 | **Set the date range of the SLA Report:**   1. Click the “Edit” button at the top of the screen. 2. Select “Data”.      1. Click the “OK” button.      1. Under the “Filters” box, hover over “TrDate”. A down arrow will appear.      1. Select “Value (Defined Value)”.      1. Select “Define Value”. 2. Check the “Defined Value” circle. 3. Select “Last Calendar Month” from the drop-down list. Once this is selected for all of the monthly reports it will not have to be set up again and only a) through c) of **Step 2** will need to be performed in the future.      1. Click the “Submit” button. This will generate the Monthly SLA Report. |
| 3 | **Publish the Monthly SLM Report:**   1. Once the SLM Report has been generated from Step 2, click the “Publish” button.      1. To save the report and the date range which has been selected, click the “Save” button. |
| 4 | Export the Monthly SLA Report:   1. Click the “export” button near the top of the screen.      1. Select “Export to PDF”.      1. Select “Landscape”. 2. Click the “Export” button.      1. A report will generate and appear at the bottom of the screen. Double click to open it.      1. Click the “Download” arrow at the top of the screen to save the report.      1. Save the PDF version of the report to the following location:   [O:\share\Service Delivery\Service Level Management\SLA Reporting\Reporting\YYYYY\Monthly CPI GPI KPI Reports\Month](\\\\jacksonnational.com\\SHARE\\hq\\vol3\\share\\Service Delivery\\Service Level Management\\SLA Reporting\\Reporting)   1. Close the PDF file. 2. Click the “Export” button near the top of the screen. 3. Select “Export to XLSX”.      1. Repeat c) through e). 2. Save the Excel versions of the report to the same location in g). 3. Repeat **Step 1** f) through h). **Step 2**, **Step 3**, and **Step 4** a) through j) until a PDF and Excel version of the following reports have been created:    * CPI APP 1.1-1.3 and 1.5-1.6 Monthly Platinum SLA Percentage Summary Report    * CPI APP 1.7 Monthly Gold SLA Percentage Summary Report    * KPI APP 1.5 Monthly Silver SLA Percentage Summary Report    * KPI APP 1.6 Monthly Bronze SLA Percentage Summary Report 4. Repeat **Step 1** f) through h). **Step 2**, **Step 3**, and **Step 4** a) through j) until a PDF and Excel version of the following reports have been created:  * CPI APP 1.1-1.3 and 1.5-1.6 Monthly Platinum SLA Detail Report * CPI APP 1.7 Monthly Gold SLA Detail Report * KPI APP 1.5 Monthly Silver SLA Detail Report * KPI APP 1.6 Monthly Bronze SLA Detail Report   *:*  [O:\share\Service Delivery\Service Level Management\SLA Reporting\Reporting\YYYYY\Monthly CPI GPI KPI Reports\Month\SLA Detail Reports](file:///\\jacksonnational.com\SHARE\hq\vol3\share\Service%20Delivery\Service%20Level%20Management\SLA%20Reporting\Reporting)  These reports will be used to populate the raw data tabs in the CPI and KPI reports each month. |
| 9 | Save reports to SharePoint   1. Once Monthly reporting has completed, publish The Monthly SLA Percentage Summary reports to the following location:   [SharePoint](http://docs.jackson.local/it/sites/rs/_layouts/15/start.aspx#/Monthly%20Reporting/Forms/current.aspx?RootFolder=%2Fit%2Fsites%2Frs%2FMonthly%20Reporting%2FSLM%2FMonthly%20SLA%20Information%2FMonthly%20SLA%20Report&FolderCTID=0x0120008757BF0A693734429A00C5DB64BC5778&View=%7B240B9B17%2D0630%2D4691%2DAA51%2DE27EC38CF00E%7D) – Monthly SLA Information – Monthly SLA Report – Year – SLA Percentage  Summary Reports   1. Once Monthly reporting has completed, publish The Monthly SLA Detail reports to the following location:   [SharePoint](http://docs.jackson.local/it/sites/rs/_layouts/15/start.aspx#/Monthly%20Reporting/Forms/current.aspx?RootFolder=%2Fit%2Fsites%2Frs%2FMonthly%20Reporting%2FSLM%2FMonthly%20SLA%20Information%2FMonthly%20SLA%20Report&FolderCTID=0x0120008757BF0A693734429A00C5DB64BC5778&View=%7B240B9B17%2D0630%2D4691%2DAA51%2DE27EC38CF00E%7D) – Monthly SLA Information – Monthly SLA Report – Year – SLA Detail 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 | |
| Responsible Party: Sharla Piepkow, Manager, Service Level Management Approving Authority: Rob Kolm, Director, IT Service Management | Date Created: 05/29/2019 Last Modified: 05/27/2020 Last Reviewed: |