# Create Master Record Procedure

Service Level Management

**Purpose**

A Master Record is the tool required to provide information to a Detail Record. When the automatic Master Refresh runs each morning at 12:30 AM or is manually run during the day, the Detail Record is created / updated. Information from the Detail Record is fed into the SLA Report. The Master Record is also where a Service Tier (Platinum, Gold, Silver, or Bronze) and the Availability Window are defined for the SLA Report.

For more information see:

[Manually Run Master Refresh Procedure](https://confluence.jacksonnational.com/display/CPENABLE/07+-+Manually+Run+Master+Refresh+Procedure?preview=/575465346/575465348/Manually%20Run%20Master%20Refresh%20Procedure.docx)

[Master Record Documentation](https://confluence.jacksonnational.com/display/CPENABLE/03+-+Master+Record+Documentation?preview=/575465565/590262647/Measurement%20Record%20Documentation.docx)

**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 | To access the Master Record form, go to the following URL:  Production:  [https://remedy.jacksonnational.com/arsys/forms/remedy/JNL:APP\_Master](https://remedy.jacksonnational.com/arsys/forms/remedy/JNL%3ASVC%3AAPP_Master/Administrator+View/?cacheid=76217c1d)  Development:  [https://remedytest.jacksonnational.com/arsys/forms/remedytest/JNL:SVC:APP\_Master](https://remedytest.jacksonnational.com/arsys/forms/remedytest/JNL%3ASVC%3AAPP_Master/Administrator+View/?cacheid=e81540b2) |
| 2 | To create a new Master Record:   1. Click the “New Request” button     ***Note:*** *It is very important that the information entered into the Master Record matches the corresponding Business Unit, Service Target, and Service name exactly, otherwise no reporting will occur.*   1. The following fields need to be entered manually:  * **Business Unit:** Copy the Service Level Tier name from ***Appendix A***   of this procedure. **Go to Step 3** if a new Business Unit  needs to be created.   * **Service Target:** Copy this information from the “Title” field of the Service   Target.   * **Service:** Copy this information from the “Business Service” field in the   Agreement. The “Tech Service” suffix should be included.   * **Business Entity:** Select the Business Time Entity from drop down menu.      1. In the “Availability” tab, fill in the Start and End times. These must match the Business Time Segments that were linked to the Business Time Entity.   For more information see:  [Create Business Time Entity Procedure](https://confluence.jacksonnational.com/display/CPENABLE/Create+Business+Time+Entity?preview=/610910968/610910971/Create%20Business%20Time%20Entity%20Procedure.docx)     1. Click the “Save” button.     ***Note:*** *Once the Master Record is saved, two fields will auto populate. These fields will appear on the SLA Report.*   * ***BTS\_Description*** *– This information is based on the Business Time Entity that is used.* * ***Compliance Target*** *– This picks up the last two characters that are used in the Service Target name. At this time only two characters can appear.* |
| 3 | If a new Service Level Tier name needs to be added to the SLM Report, discuss with the Service Level Manager as to what the correct name should be. Once decided, the agreed upon name should be typed into the “Business Unit” field exactly as it is expected to appear on the SLM Report.  Add the Service Level Tier name to ***Appendix A*** of this procedure. |
| 4 | **Remove a Master Record**  When it is decided that an application no longer needs to be reported on for SLAs, the Master Record must be deleted. A new Detail Record will be created each day until it is.   1. Create a Remedy Incident request ticket and assign it to ITSM Suite Administration. 2. Include the name of the Master Record to be deleted and include the Request ID from the Master Record.      1. Attach a screen shot of the Master Record to the worklog of the Remedy ticket. 2. Within the same request ticket, ask that the Detail Records for the service be deleted as well, going back to the first day of the current month. If these are not removed the service will appear on the SLA report for the dates in which Detail Records exist. |

**Appendix A – Service Level Tier Names**

The Service Level Tier Names must appear exactly as listed in the “Business Unit” field of the Master Record.

Bronze Applications Aggregate

Gold Applications Aggregate

Platinum Applications

Silver Applications Aggregate

***Note:*** *This field has been repurposed for the Service Level Tier name. Applications are no longer reported by Business Unit.*

**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, PGDS

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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: 08/23/2017 Last Modified: 05/12/2020 Last Reviewed: |