# SLM Run & Review the SLM Report Procedure

Service Level Management

**Purpose**

The SLM Report is run daily and monthly in order for the Service Level Management team to review for Service Targets that have missed and / or breached SLAs, which in turn could cause the Service Target to be in danger of being breached for the month. The report is normally run from the first day of the month to the current date, but it can be run for any reporting period necessary. The SLM Report can also be run by specific Services or specific Business Units, or a combination of both.

**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**

|  |  |
| --- | --- |
| Step | Action |
| 1 | **Access the SLM Report.**   1. In Remedy, open Analytics as follows:  * Click the Applications tab on the side. * Click the “Analytics” tab. * Select “Analytics”      1. A logon screen will appear.      1. Click the “Documents” tab at the top of the screen.      1. Click the “Folders” option at the bottom of the screen.      1. A list of folders will appear. Double click on “BMC Analytics for BSM”.      1. A second set of folders will appear. Double click on “SLM Custom Report”.      1. A list of reports will appear. Double click on “SLD Report\_Custom”.      1. The last version of the report that was saved will appear. |
| 2 | **Run the SLM Report for all Services and Business Units**   1. Click the “Refresh” button      1. A refresh box will appear on the screen for a few seconds.      1. A prompt screen will appear. Update information as needed:  * **Enter Reporting Period Start Date** – Type in the date in which the report should start on. The format is YYYY-MM-DD.      * **Enter Reporting Period End Date** – Type in the date in which the report should end on. The format is YYYY-MM-DD.   ***Note:*** *The current day will not appear on the report unless a Master Refresh has been run. An automatic Master Refresh run at 12:30 AM (ET) each day to pull in the previous days data. See the “****SLM Manually Run Master Refresh Procedure****” if current day’s data is required.*     * **Enter value(s) for BusinessUnit** – When running the Daily or Monthly SLM Report, all active Business Units should be selected. Only Business Units present in the second box will appear on the SLM Report.   + If a new Business Unit is to be reported on, use the forward-arrow button to move it into the second box.   + If you wish to run a report for a specific Business Unit only, see **Step 4** of this procedure.   ***Note:*** *To put the Business Units in the first box in alphabetical order, click on the “BusinessUnit” tab at the top of the first box.*     * **Enter value(s) for Service** – When running a Daily or Monthly SLM Report, all services should be selected. Only Services present in the second box will appear on the SLM Report.      * + If a new Service is to be reported on, use the forward-arrow button to move it into the second box. * If you wish to run a report for a specific service only, see **Step 5** of this procedure.   ***Note:*** *To put the services in the first box in alphabetical order, click on the “Service” tab at the top of the first box.*     1. Click the “OK” button.      1. An updated report will appear. 2. To save the prompt settings, click the “Save” icon at the top of the screen. |
| 3 | The report can be saved to a drive as a PDF, Excel, CSV, or test file.   1. Click the “Export” icon at the top of the screen. 2. Select “Export Document As”.Select the format in which the report should be saved as.      1. Select “Save File” 2. Click the “OK” button.      1. Save to the desired destination.     ***Note:*** *The PDF format should be used for Daily and Monthly reports that are*  *published to SharePoint.*  *Use the Excel format when reviewing the initial Daily report to look for*  *Missed and or breached SLAs. See the* ***SLM Working the Daily SLM***  ***Report Procedure*** *for more information.*   1. If report is being created for all Business Units and Services, skip to Step 6. |
| 4 | **Run SLM Report for specific Business Unit**   1. Follow Step 1 of this procedure to access the report in Analytics. 2. Click the “Refresh” button      1. A refresh box will appear on the screen for a few seconds.      1. A prompt screen will appear. Select the desired date range per Step 2c of this procedure. 2. At the “Enter value(s) for Business Unit” click on each Business Unit in the second box that is not needed on the report and use the backwards “arrow” button to move them out of the box.      1. When finished, only the Business Unit(s) that you wish to report on will remain in the second box.      1. Only services associated with the desired Business Unit will appear on the report. |
| 5 | **Run SLM Report for a specific Service**   1. Follow Step 1 of this procedure to access the report in Analytics. 2. Click the “Refresh” button      1. A refresh box will appear on the screen for a few seconds.      1. A prompt screen will appear. Select the desired date range per Step 2 c) of this procedure. 2. At the “Enter value(s) for Service” click on the services in the second box that are not needed on the report and use the backwards “arrow” button to move them out of the box.      1. When finished, only the service(s) that you wish to report on will remain in the second box.      1. If a service is reported on under more than one Business Unit, each Business Unit will appear on the report for that service as well. If only a specific Business Unit is desired, follow **Step 4** of this procedure. |
| 6 | **Review SLM Report**  The SLM Report is broken down by Business Units and the Services associated with them. The following information explains each aspect of the report.   * **Business Unit** – The name of the Business Unit will appear above the name of the first Service being monitored for a SLA. In the example below, “JNL Operations SLA” is the name of the Business Unit.   See ***Appendix B*** for the list of current Business Units being reported on.   * **Service Name** – The Service name is the Service (configuration item) that is related to a Service Target. Service names will appear in alphabetical order under each Business Unit that it is associated with. In the example below, “Accounting Audit” is the name of the Service. * **Target: Percentage** – The compliance target percentage that is set up in the Agreement related to the Service Target. It appears on the same line as the *Service Target Date & Time Frame*. * **Service Target Date & Time Frame** – The days and times in which the service is expected to be available is located on the same line as the *Target: Percentage*. The days and times are the ones set up in the Master Record, and must match the Business Time Segments that are linked to the Business Time Entities.   See the ***SLM Create Business Time Segment Procedure***, ***SLM Create Business Time Entity Procedure***, and ***SLM Create Master Record Procedure*** for more information.     * **Date –** The date and day of the week in which the Service is being reported on.   ***Note:*** *The current date will not show on the report unless a Master Refresh*  *is run using the following date. See* ***SLM Manually Run Master***  ***Refresh Procedure*** *for more information.*  ***Note:*** *Only the days of the week that are part of the Service Target window*  *will appear on the report.*   * **Minutes Available** – Represents the total minutes for the day in which the Service is expected to be available. If “Down Time (mins)” or “Carve Out (mins)” appear, the minutes in the “Minutes Available” field will be less the minutes in those fields. Ultimately, all three fields should add up to the expected number of minutes each day.      * **Down Time (mins)** – The total number of minutes in which the Service was uunavailable for that day. If there are error minutes, the number that is expected in the “Minutes Available” field should be minus those error minutes, as well as any minutes that appear in the “Carve Out (mins)” field.   Whenever error minutes appear on the SLA Report, research must be performed to find out the cause of the outage. See the ***SLM Working the Daily SLM Report*** ***Procedure*** for more information.     * **Carve Out (mins)** – Minutes will appear in this field after research is performed regarding the error minutes found in the “Down Time (mins) field”. The minutes in this field can be a full or partial carve out of the error minutes. The minutes found in the “Carve Out (mins”), “Down Time (mins)”, and “Minutes Available” fields should add up to the expected number of minutes each day.   *Example: Full Carve-Out*    *Example: Partial Carve-Out*     * **Actual %** - This is the percentage of availability for the day. If there are no error or carve-out minutes, the expected percentage of the day is 100%.   The formula for calculating the Actual % is:  “Minutes Available” + “Carve Out (mins)” / Expected minutes \* 100   * In this example, a carve out does not appear. The formula is still the same.   For “10/3/17, Tue”  566 + 0 / 630 \* 100 = 89.84%     * In this example, a carve out does appear.   For “10/4/17, Wed”  436 + 15 / 660 \* 100 = 68.33%    ***Note:*** *If the “Actual %” is less than 100% but is above the compliance target*  *percentage, the SLA is considered “Missed”. If the “Actual %” is less than the*  *compliance target, the SLA is considered “Breached”.*   * **Comment** - A comment is added to the Incident ticket in which a CI Unavailability record was created. It briefly explains the cause of the outage and / or the reason for the carve out. Incident and Problem ticket numbers must always be included, unless a deliverable has a missed or breached SLA due to a holiday.      * **SLA Stats** – This line includes the Totals Days that are being reported on, the days in which the SLA was met, and the Percentage in which the SLA was met for the reporting period. * **Total Days** – Represents the number of days in the reporting period. If a report is run from first of the month to the end of the month, but the Service Target availability is only for Monday through Friday, the “Total Days” will not include Saturdays and Sundays. * **Actual Days SLA Met** – Features the number of days that the SLA met the compliance target. If the percentage in the “Actual %” field is less than the compliance target, then the SLA was breached for that day. The number of days in which an SLA was breached will make the “Actual Days SLA Met” total be that many less than the “Total Days” * **Percentage of SLA Met** – The percentage for the entire reporting period   If there are no error or carve-out minutes, the expected percentage of the day is 100%.    The formula for calculating the Percentage of SLA Met:  “Total Minutes Available for the reporting period” + “Total Carve Out (mins)” / Total Expected minutes for the reporting period \* 100   * Example: For 10/2/17 through 10/18/17   10,447 + 0 / 10,920 \* 100 = 95.67% |

**Appendix A – Report Formulas**

The following information shows the formulas being used for each section of the report.

* **Reporting Period**

Example:



=[Reporting Start Date]+" through "+[Reporting End Date]

* **Business Unit**

Example:



=[BusinessUnit]

* **Service Name**

Example:



=Substr([Service];0;Length([Service])-10)

* **Service Target Compliance Percentage and Time Frame**

Example:



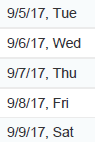
="Target: "+Substr([ServiceTarget];Length([ServiceTarget])-1;Length([ServiceTarget]))+"% "+[BTSDescription]

* **Date in header bar**



=NameOf([Date])

* **Date**



=[Date]+", "+Substr([DayName];0;3)

* **Minutes Available**



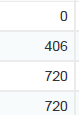
=[Verified]

* **Down Time (mins)**



=[Query 1].[Error]

* **Carve Out (mins)**



=[BlackoutDuration]

* **Actual %**



=[Actual\_Percentage]

* **Comments**



=[SLA Comment]

* **Status Line** – The formulas are all listed together with spaces in between. Below is the breakdown of each section and formula.



="SLA Stats:"+" "+"Total Days: "+Count([Date])+" "+"Actual Days SLA Met: "+(If [TotalActualDaysMet]>=1 Then [TotalActualDaysMet] Else "0")+" "+"Percentage of SLA Met: "+( ([Total\_Verified]+[Total\_blackOut])/([Total\_Verified]+[Total\_blackOut]+[Total\_errors]))\*100+"%"

* **SLA Stats**

="SLA Stats:"+"

* **Total Days**

"+"Total Days: "+Count([Date])+"

* **Actual Days SLA Met**

"+"Actual Days SLA Met: "+(If [TotalActualDaysMet]>=1 Then [TotalActualDaysMet] Else "0")+"

* **Percentage of SLA Met**

"+"Percentage of SLA Met: "+( ([Total\_Verified]+[Total\_blackOut])/([Total\_Verified]+[Total\_blackOut]+[Total\_errors]))\*100+"%"

**Appendix B – Business Units**

The current Business Units must appear exactly as listed in the “Business Unit” field of the Master Record.

JNL Actuarial SLA

Broker-Dealer SLA

JNL Finance SLA

JNL Asset Management SLA

JNL Operations SLA

**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: Anna Carter, Manager, Service Level Management Approving Authority: Abdul Golden, Director, IT Service Management | Date Created: 10/27/2017 Last Modified:  Last Reviewed: |