# SLM Create Monthly SLM Report Procedure

Service Level Management

**Purpose**

Three versions of the Monthly SLM Report are created each month as follows:

1. The Monthly SLM Report is created on the first business day of the month and sent to Service Level Management for review.
2. The Monthly SLM Report is re-created with updates on the third business day of the month and sent to SIG and JTS for review.
3. The finalized version of the Monthly SLM Report is created on the seventh business day of the month and is published on Sharepoint.

**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 | The Monthly SLM Report is 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 report, based on the daily review of the SLM Report throughout the previous month.  See the ***SLM Run and Review SLM Report Procedure*** and SLM Working the ***SLM Working the*** ***Daily SLM Report Procedure*** for more information. |
| 2 | The first version of the Monthly SLM Report is created on the first business day of the month. It is to be reviewed and color coded for the Service Level Manager.   1. Use the “Highlight Text” icon at the top of the screen.      1. Highlight the entire row(s) in which a comment appears. The default color is yellow.      1. To change the color, right click in the section that has been highlighted. 2. Click on “Properties” 3. Click the box next to “Color:”.      1. Select the correct color. The colors should be as follow:  * Yellow – Anytime the “Actual Percentage” is less than 100%, but the   compliance target was still met.   * Green – Anytime the “Actual Percentage” equals 100% and a carve-out was   applied.   * Light Red – Anytime the “Actual Percentage” is less than the compliance   target.  ***Note:*** *For the correct shade of red, click the “Red” color and*  *change the “Opacity” to 40%. This color is used in the event*  *that the text in the report may be red.*       1. Click the “OK” button.      1. Continue to highlight each row with the correct color. 2. If the “Percentage of SLA Met” number is less than 100%, it should also be highlighted using the “Yellow” or “Light Red” color codes listed in 2 f) above.      1. In the event that the “Percentage of SLA Met” is less than the compliance target, a Problem ticket needs to be created for that service. Any Incident tickets listed in the comments for the month need to be related to the Problem ticket. 2. Notes can be added to explain certain issues if necessary. 3. Once the report has been reviewed and color coded, email to the Service Level Manager. 4. The Service Level Manager will review and work with you if any issues need to be addressed. 5. The Service Level Manager will forward the report to the IT Service Management Director to review. 6. The IT Service Management Director will review and work with you if any issues need to be addressed. 7. The IT Service Management Director will provide approval that it is appropriate to send to the SIG and JTS teams.   ***Note:*** *Upon running the first version of the Monthly SLM Report, it is expected that some comments may state that a SIG or JTS team is still “investigating” an issue.* |
| 3 | The Monthly SLM Report should be recreated on the third business day of the month. It will include any updates suggested by the Service Level Manager and / or IT Service Management Director, and possibly updates for issues that were still being investigated by SIG or JTS teams at the time the first report was created. Send the report via email as follows:   1. Use a previous month’s email SIG & JTS to obtain the most recent distribution list. 2. Use the following format for the subject of the email:   MONTH YEAR SLA Report for Review    ***Note:*** *The month will be the previous month.*   1. The body of the email should read as follows:  * We have worked with SIG and JTS staff to validate the outages and analyze   the data to determine the causes.  The information has been added to the  report as comments along with any Incident/Problem/Change numbers that  are identified as being involved with the outages. Please review this PDF  document that contains the outages and comments for the month of  Month Year and provide any required changes to the report by COB on  Day Date 1.  We will be publishing the official report on Day Date 2.   * Month Year – The previous month * Day Date 1 – The sixth business day of the month * Day Date 2 – The seventh business day of the month  1. A SIG or JTS team member will notify you if any corrections need to be made.     ***Note:*** *Upon running the second version of the Monthly SLM Report, it is expected that some comments may state that a SIG or JTS team is still “investigating” an issue*. |
| 4 | The finalized version of the Monthly SLM Report is created on the seventh business day of the month. Any issues that were being investigated when the first and second versions of the report were created must be resolved at this time. Publish the finalized report to Sharepoint as follows:   1. Save the Monthly SLM Report to the following location and appropriate folder:   [O:\\Service Delivery\Service Level Management\Reporting\Monthly SLA Report](../../../Reporting/Monthly%20SLA%20Report)     1. Upload to Sharepoint in the appropriate folder by year at the following location:   <http://docs.jackson.local/it/sites/rs/_layouts/15/start.aspx#/Monthly%20Reporting/Forms/current.aspx>     1. Obtain the link to the Monthly SLM Report that has just been uploaded by clicking on the three dots next to the report name. 2. Copy the link under the “Shared with lots of people” section.      1. Send an email to the following groups:   Service Level Management  SLA Monthly Reports  CC: Service Level Manager   1. Paste the link to the Monthly SLM Report that has been uploaded to Sharepoint. 2. The body of the email should read as follows:  * Please follow the link below for the Month Year SLA Report.     ***Note:*** *The month will be the previous month.* |

**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: 12/20/2017 Last Modified:  Last Reviewed: |