# Master Record Documentation

Continuous Performance Enablement

**Purpose**

A Master Record exists for every Service that is to be reported on. It contains the necessary Service Target information (Business Unit, Service name, the Service Target time frame, and Service Target percentage) that will appear on the SLA Report. If a SLM Incident ticket with a CI Unavailability Record exists for a service, the Master Record will also contain that information as well. The data is processed via a Master Refresh to create or update a Detail Record that is used by the SLA Report.

For more information see:

[Create a Master Record Procedure](O:\\Service Delivery\\Service Level Management\\Procedures\\SLM for Remedy 9\\Service Target Procedures\\Create a Master Record Procedure.docx)

[Manually Run Master Refresh Procedure](../SLA%20Reporting%20Procedures/Manually%20Run%20Master%20Refresh%20Procedure.docx)

[Incident Ticket with CI Unavailability Record Documentation](Incident%20Ticket%20with%20CI%20Unavailability%20Record%20Documentation%20.docx)

[Detail Record Documentation](Detail%20Record%20Documentation.docx)

**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:

* Continuous Performance Enablement

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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=4e037170)  Development:  [https://remedytest.jacksonnational.com/arsys/forms/remedytest/JNL:SVC:APP\_Master](https://remedytest.jacksonnational.com/arsys/forms/remedytest/JNL%3ASVC%3AAPP_Master) |
| 2 | **Search for Master Record**  A search for a Master Record can be performed for an individual Service Target, Business Unit and Service, or all Service Targets, Business Units, and Services using the specified fields on the Master Record form:   * **Service Target Search** * Type information in the “Service Target” field to look for one or more Service Targets. * Use the % sign as a wild card. * Use the following examples of word combinations to help find what you are looking for: * **SVT%** - Displays a list of all Master Records for all Service Targets. * **SVT%Business Unit Abbreviation%** - Displays a list all Master Records for the specified Business Unit (example, SVT%OPS% will display all of the Master Records for all Service Targets associated with the Operations Business Unit. See ***Appendix A*** for more information on Business Unit abbreviations). * **SVT%Service Name%** - Displays a list of Master Records for a single Service, and all of the Business Units it is associated with. (example, SVT%CDS% will display a list of all Master Records for the “CDS” service and its corresponding Business Units). * **SVT%Business Unit Abbreviation%Service Name%** - Displays a list of all Master Records for a single Service for the specified Business Unit. (example, SVT%OPS%CDS% will display the Master Record for the CDS Service that is associated with the Operations Business Unit. See ***Appendix A*** for more information on Business Unit abbreviations).     ***Note:*** *To put any of the columns in alphabetical order, click the heading (Business Unit /*  *Service / Service Target) on the blue bar.*     * **Business Unit Search** * Type information in the “Business Unit” field to look for one or more Business Units. * Use the % sign as a wild card. * Use the following examples of word combinations to help find what you are looking for. * **%** - Displays a list of all Master Records for all Business Units that exist. * **%Business Unit Name%** - Displays a list of all of the Master Records for the specified Business Unit (example, %Finance% will display all of the Master Records for the *JNL Finance SLA* Business Unit. See **Appendix A** for more information). * **%Partial Business Unit Name%** - Displays a list of all Master Records that are for Business Units that contain the specified part of the Business Unit name that was entered (example, %JNL% will display all of the Business Units that being with “JNL”. See **Appendix B** for more information).     ***Note:*** *To put any of the columns in alphabetical order, click the heading (Business Unit /*  *Service / Service Target) on the blue bar.*     * **Service Search** * Type information in the “Service” field to look for one or more Services. * Use the % sign as a wild card. * Use the following examples of word combinations to help find what you are looking for. * **%Production%** - Displays a list of all the Master Records for all Services that are associated with Service Targets. * **%Service Name%** - Displays a list of all the Master Records that contain the specified Service name. (example, %CDS% will display all of the Master Records for the *Cash Disbursement System (CDS)* service).   *.*  ***Note:*** *To put any of the columns in alphabetical order, click the heading (Business Unit /*  *Service / Service Target) on the blue bar.* |
| 3 | **Review the Master Record**  A Master Record exists for each Service Target. Note the following fields:   * **Business Unit:** The name of the Business Unit that has requested an SLA for   the service.   * **Service Target:** The Service Target Name. * **Service:** The Service name that is used in Remedy. * **Business Entity:** Selected from the drop-down list, the entity contains the Service   Target time frame in which the service will be monitored for an SLA.   * **BTS\_Description:** Displays the Service Target time frame information as it will   appear on the SLA Report.   * **Compliance Target:** The Service Target percentage. This field is populated by the   last two characters of the Service Target name.   * **StartDT:** Displays the start date and time of the Master Record being viewed.   The Master Record will always appear for the previous date. Different dates  can be viewed by using the “z1D\_Action” and “TRDate” fields.  For more information see:  [Manually Run Master Refresh Procedure](../SLA%20Reporting%20Procedures/Manually%20Run%20Master%20Refresh%20Procedure.docx)   * **EndDt:** Displays the end date and time of the Master Record being viewed. * **VarifiedTimeDuration:** The total number of minutes the service is expected to be   available per day.    The lower section of the Master Record contains two tables. If a SLM Incident ticket with a CI Unavailability Record exists, information from the ticket will appear.   * To view the information, manually run the Master Refresh.      * Click the “Refresh” button for each table.      * The first table will show the SLM Incident ticket(s) that were created on the date that is being viewed. * The second table will show the comment that was added to the SLM Incident ticket.   For more information see:  [Add Comments to SLM Incident Ticket Procedure.](../SLA%20Reporting%20Procedures/Add%20Comments%20to%20SLM%20Incident%20Ticket%20Procedure.docx)  The side section will display the “Availability” tab. The times in each field show the start and end time for each day that the service is expected to be available to meet the Service Target requirements. The times must match the time frame featured in the “BTS\_Description” field. |

**Appendix A – Business Units**

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

JET – Application Delivery

JET – Infrastructure

JNL Actuarial SLA

JNL Finance SLA

JNL Asset Management SLA

JNL Operations SLA

**Appendix B – Business Unit Abbreviations**

Actuarial – ACT

Finance – FIN

Jackson Enterprise Technology Infrastructure – JET

JNL Asset Management – JNAM

Operations – OPS

**Modification**

The following associates can make modifications to this document:

* Director, Continuous Performance Enablement
* Vice President, Continuous Performance Enablement
* Chief Technology Officer, JET

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| Continuous Performance Enablement Process | |
| Responsible Party: CPE Metrics Approving Authority: Bali Bodeddula, Director, JET Continuous Performance Enablement | Date Created: 08/23/2017 Last Modified:  Last Reviewed: |