# Generate Monthly SLA Report Procedure

Continuous Performance Enablement

**Purpose**

The Monthly SLA 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 SLA Report throughout the previous month.

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

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

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](Working%20CI%20Unavailability%20Record%20Tickets%20Procedure.docx)

[Create an Investigation Ticket for Missed Breached SLA Procedure](Create%20an%20Investigation%20Ticket%20for%20Missed%20Breached%20SLA%20Procedure.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

**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. Click on “SLA Monthly Report – MMMM YYYY”.      1. The SLA Report will appear on the screen, with tabs separating each Business Unit.     ***Note:*** *The date range is set to only report on the “Last Calendar Month” so a date range does not have to be set.* |
| 2 | **Publish the Monthly SLA Report:**   1. Once the SLA Report has been generated from Step 1, click the “Publish” button.      1. Update the name of the repot to reflect the previous month that is being reported on. 2. 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. Click the “Open” button      1. Review the report to ensure that the outage minutes, carve out minutes, and comments appear as expected. 2. Save the report to the Monthly SLA Report folder located at:   [\\jacksonnational.com\GROUP\ITVOL1\VOL1\group\PM COE\Forecasting & Metrics Model Rollout\SLA Reporting\Reporting\YYYY\Monthly SLA Report\Month\SLA Report Emails](\\\\jacksonnational.com\\GROUP\\ITVOL1\\VOL1\\group\\PM COE\\Forecasting & Metrics Model Rollout\\SLA Reporting\\Reporting)  Save as:  First Draft - Month-Year-Monthly SLA Report for SLM Review.pdf.  Second Draft – Month-Year Monthly SLA Report for Review.pdf   1. Save the report to the Monthly SLA Report folder located at:   [\\jacksonnational.com\GROUP\ITVOL1\VOL1\group\PM COE\Forecasting & Metrics Model Rollout\SLA Reporting\Reporting\YYYY\Monthly SLA Report\Month](file:///\\jacksonnational.com\GROUP\ITVOL1\VOL1\group\PM%20COE\Forecasting%20&%20Metrics%20Model%20Rollout\SLA%20Reporting\Reporting\YYYY\Monthly%20SLA%20Report\Month)  Save as:  Final Version – Month-Year Monthly SLA Report.pdf  Month-Year Monthly SLA Report.xls |
| 5 | The first version of the Monthly SLA 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. Where a comment appears in the report, highlight the row using the “Highlight Text” icon at the top of the screen.      1. Color code the row using the following key:   Yellow – Anytime the “Availability Percentage” is less than 100%, but the compliance target  was still met.  Green – Anytime the “Availability Percentage” equals 100% and a carve-out was applied.  Red – Anytime the “Availability Percentage” is less than the compliance target.     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:” and select red or green (yellow is the default).      1. Click the “OK” button. 2. Once you have gone through the entire report and ensured that all of the rows with comments have been highlighted, email the report to Service Level Management. Include the IT SLM Director as he / she will give final approval to move on to Step 6.    * List any breaches that are contained within the report.    * If there is an on-going monitoring issue with a service, include that information.    * Request that approval is needed by the third business day of the month in order to send to JET for further review.   ***Example:*** |
| 6 | The Monthly SLA Report should be re-created 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 updates for issues that were still being investigated by JET at the time the first report was created. Send the report via email as follows:   1. Repeat Step 1. 2. Repeat Step 3 and 4. 3. Review the report closely to ensure all outages have been documented. 4. Send an email to the *Service Level Management* and *SLA* distribution email groups for review: 5. **Subject:** MONTH YEAR SLA Report for Review   ***Note:*** *The month will be the previous month.*   1. **Email Content:**   We have worked with the JET 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 current month. * Day Date 2 – The seventh business day of the current month.  1. List any breaches that are contained within the report. 2. If there is an on-going monitoring issue with a service, include that information. 3. Attach the second version of the report (Month-Year Monthly SLA Report for Review.pdf) to the email.   **Example:**     1. A JET team member will notify you if any corrections need to be made to the comments or carve-outs.   ***Note:*** *Upon running the second version of the Monthly SLA Report, it is expected that some comments may state that a JET team is still “investigating” an issue*. |
| 7 | The finalized version of the Monthly SLA 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.   1. Repeat Step 1. 2. Repeat Step 3 and 4. 3. Review the report closely to ensure all outages have been documented. 4. Continue to **Step 8** to publish the Monthly SLA Report to SharePoint. |
| 8 | Publish Monthly SLA Report and the KPI (Red/Green) Report to SharePoint:   1. Navigate to [Monthly Reporting/SLA/Monthly SLA Information](http://docs.jackson.local/it/sites/rs/Monthly%20Reporting/Forms/current.aspx?RootFolder=%2Fit%2Fsites%2Frs%2FMonthly%20Reporting%2FSLM%2FMonthly%20SLA%20Information&FolderCTID=0x0120008757BF0A693734429A00C5DB64BC5778&View=%7B240B9B17%2D0630%2D4691%2DAA51%2DE27EC38CF00E%7D) in SharePoint. 2. Select the [Monthly KPI Report](http://docs.jackson.local/it/sites/rs/Monthly%20Reporting/Forms/current.aspx?RootFolder=%2Fit%2Fsites%2Frs%2FMonthly%20Reporting%2FSLM%2FMonthly%20SLA%20Information%2FMonthly%20KPI%20Report&FolderCTID=0x0120008757BF0A693734429A00C5DB64BC5778&View=%7B240B9B17%2D0630%2D4691%2DAA51%2DE27EC38CF00E%7D) folder. 3. Select the current year. 4. Click the “Upload” icon.      1. Navigate to the [\\jacksonnational.com\GROUP\ITVOL1\VOL1\group\PM COE\Forecasting & Metrics Model Rollout\SLA Reporting\Reporting\YYYY\2019](file:///\\jacksonnational.com\GROUP\ITVOL1\VOL1\group\PM%20COE\Forecasting%20&%20Metrics%20Model%20Rollout\SLA%20Reporting\Reporting\YYYY\2019)\Monthly KPI Reports Power Point folder and select the previous KPI Report for the month that is being reported on.   The SharePoint link will be used in **Step 9** when sending out the email for the Monthly SLA Reports.  For more information see:  [Create the Monthly KPI Status Report Procedure](Create%20the%20Monthly%20KPI%20Status%20Report.docx)   1. Click the “OK” button. 2. Click the “Save” button.      1. Navigate to [Monthly Reporting/SLA/Monthly SLA Information](http://docs.jackson.local/it/sites/rs/Monthly%20Reporting/Forms/current.aspx?RootFolder=%2Fit%2Fsites%2Frs%2FMonthly%20Reporting%2FSLM%2FMonthly%20SLA%20Information&FolderCTID=0x0120008757BF0A693734429A00C5DB64BC5778&View=%7B240B9B17%2D0630%2D4691%2DAA51%2DE27EC38CF00E%7D) in Sharepoint. 2. Select the [Monthly SLA](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=%7B240B9B17-0630-4691-AA51-E27EC38CF00E%7D) Report folder. 3. Select the current year. 4. Select the previous month. 5. Click the “Upload” icon.      1. Click the “Browse” button and navigate to [\\jacksonnational.com\GROUP\ITVOL1\VOL1\group\PM COE\Forecasting & Metrics Model Rollout\SLA Reporting\Reporting\YYYY\Monthly SLA Report\Month](file:///\\jacksonnational.com\GROUP\ITVOL1\VOL1\group\PM%20COE\Forecasting%20&%20Metrics%20Model%20Rollout\SLA%20Reporting\Reporting\YYYY\Monthly%20SLA%20Report\Month) folder and select the pdf version of the Monthly SLA Report. 2. Click the “OK” button. 3. Click the “Save” button. 4. Repeat m) through p), but select the xls version this time.   The SharePoint links to these reports will be used in **Step 9** when sending out the email for the Monthly SLA Reports. |
| 9 | Send SLA Monthly Report email:   1. Send an email to the *Service Level Management* and *SLA Monthly Report* distribution email groups.  * **Subject:** SLA Monthly Report * **Email verbiage:** Please follow the links below for the MONTH YEAR SLA Report.  1. Add the SharePoint link for the pdf and xls formats under the verbiage. Indicate which format of the report each link goes to. See example below.    * **Email verbiage:** Please follow the link below for the MONTH YEAR KPI (red/green) Report. 2. Add the SharePoint link to the under the verbiage. 3. If there are no SLA breaches for the month, continue to e). If there are any SLA breaches for the month, list them under the following verbiage:    * **Email verbiage:** Contained in the Monthly report are the following Service Level Agreement Breaches. 4. If there is an on-going monitoring issue with a service, include that information. See example below.     **Example:** |

**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 | |
| Responsible Party: CPE Metrics Approving Authority: Bali Bodeddula, Director, JET Continuous Performance Enablement | Date Created: 05/29/2019 Last Modified:  Last Reviewed: |