Creating SLA Reports (Service Level Agreements)

Service Level Agreements (SLA) help you manage your customer expectations, and with the right reporting tools you can illustrate to potential new customers just how well you are currently performing. SLA reports can extract the appropriate data and create detailed reports helping to highlight any possible areas where improvement may be required, or providing you with peace of mind that your company is providing the level of service both you and your customer expects.

Job Tracker Professional can easily produce reports to illustrate your adherence to set service levels once you have tailored your job screen to capture certain data, including the job received date and time, and the date and time work commenced. This information can be captured within the job dates section on your Jobs Screen.

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The fields highlighted in pink need to be tailored to capture the information needed in order to produce an SLA report.

This is an example of a customer's screen tailored to their own requirements. The next page of this manual will walk you through how to do this or you can watch this video

https://www.youtube.co m/watch?v=fdja95whxXc

Figure 1

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Job Tracker Pro [Jobs]							- • ×
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As a company you set your own service levels and these can differ depending on job type if you wish.

Once you have amended the field label to SLA you can add a selection list of service level time bands to choose from (next screenshot) and this can be created within the Control Panel. The time remaining on a job can then be set to autopopulate utilising the chosen time band and the job received time.

Figure 3





228 Sob Tracker Professional [Ti... Figure 5 here, is an example of the time bands Time Bands screen once completed to a customer's Description Colour Time requirements. This is how the window will Priority 1 1 day 0 hrs Priority 2 2 days 0 hrs appear when clicking on the SLA field within the Priority 3 3 days 0 hrs Jobs screen (highlighted in figure 3) No SLA 0 hrs -Time Banding for Jobs Time Bands Overdue Colour: Pick Completed Colour: Pick Select Band:Urgent Description Time In Hours Colour Start Date: 17/03/2015 . Start Time: 12:45:28 Assign Band E<u>x</u>it Figure 5 Once you have clicked on the Job Time Bands /SLA box, this window appears and allows you to set the specific time bands that you wish to associate to various jobs. You can add as many as you wish, these will then show Delete Band Add New Band Exit for selection as illustrated in figure 5 above. Figure 6 To set the time bands, click Add New Band, a new pop up appears for you to populate see - 0 83 Time Banding for Jobs figure 7. Time Bands Overdue Colour: Pick Completed Colour Pick At the top of this screen click 'Pick' next to the Description Colour Time In Hours Overdue Colour field and choose from the palate. Then repeat this for Completed Colour. These colours will show on the Live Jobs reports. Time Bands Description: Save Colour: Pick In the description field, enter the details as you D ays: Hrs wish it to appear via the Job Screen, (this could Exit be simple i.e. Urgent, 2 days etc., or could be job specific.) When selecting from the Job Screen this will appear in alphabetical order. Click the 'Pick' box next to the colour field and select from the colour pallet and click OK. Ensure these are different colours to those chosen for Figure 7 overdue or completed jobs. In the days and hours fields enter the time limits you wish to assign to this time band then click save.

Job Tracker Professional





The use of the SLA functionality comes to life when using the Live Jobs facility within Job Tracker Pro. The Live Jobs screen will now show, in 'real time', at a glance the time remaining on each job according to its service level assigned. It will also utilise the overdue colour assigned earlier in this process to highlight any jobs out of service level and requiring urgent attention. See the user manual 'Live Jobs' for more details on how to utilise this function.

The Reports function will allow you as a business to produce reports, exportable to Excel, to show your performance to your defined service levels. A great tool to highlight any areas of the business needing attention but also an asset to the company in helping you illustrate to potential new customers how well you as a business are performing.

Filter By Customer / Client Site Type: Include All Addresses	Date Filtering Between: 01/02/	2015 and 17/03/2015
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		Generate Report ✓ Export To Excel

To run such a report, form the main screen select Reports.

This window will appear which allows you to apply filters dependant on what you wish the report to show. Once you have set your filter requirements, click the SLA button then click Generate Report. A report is then generated detailing all jobs within the set filters, it will detail to which time band each job was allocated and provide details of performance to service level.

The report will summarise the performance to service level of each job and also provide a summary of each time band.