

## 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.

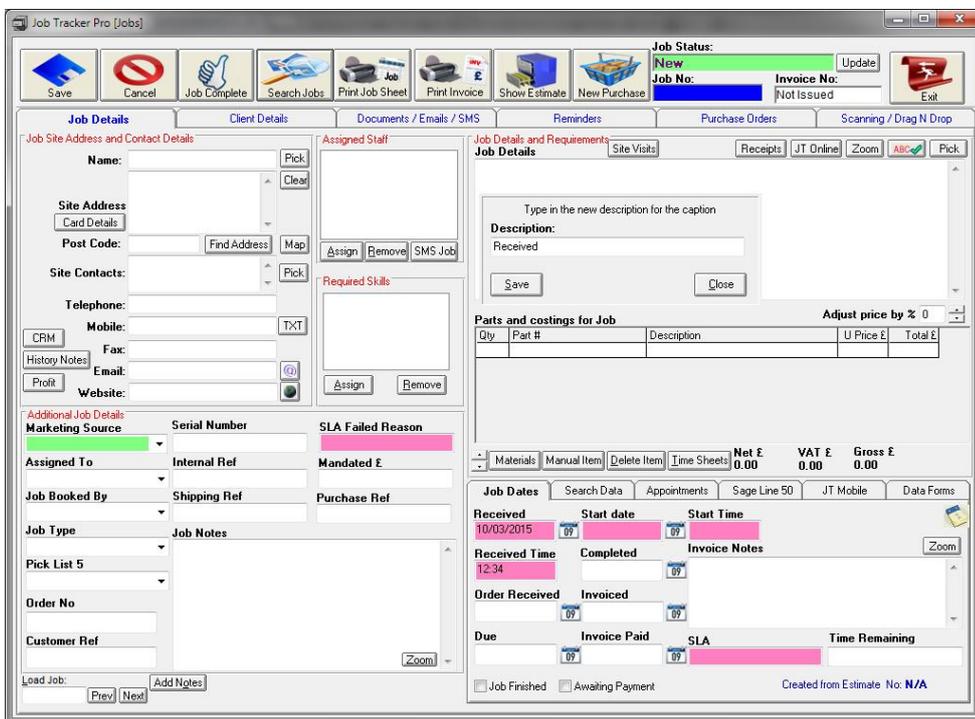


Figure 1

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.com/watch?v=fdja95whxXc>

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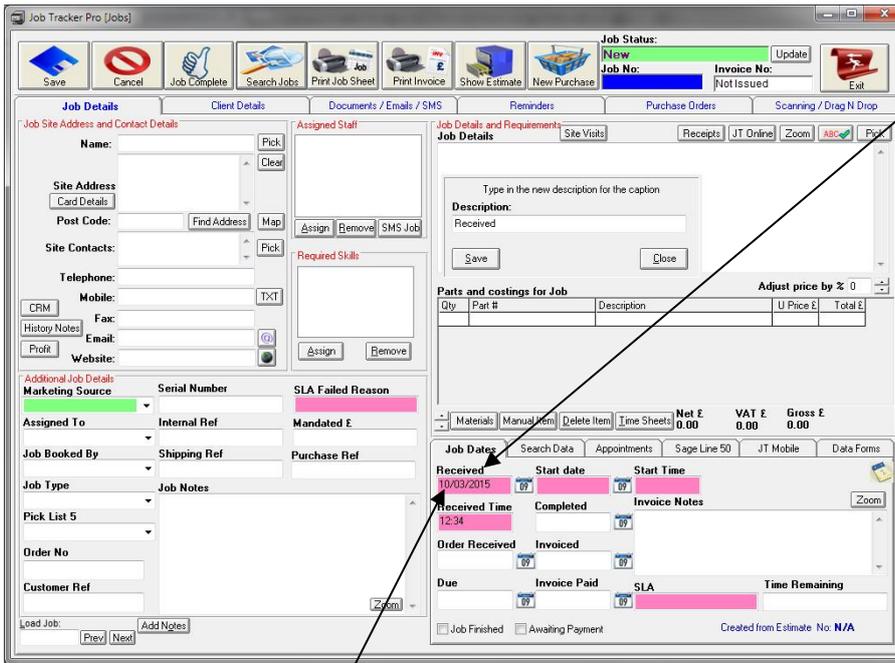
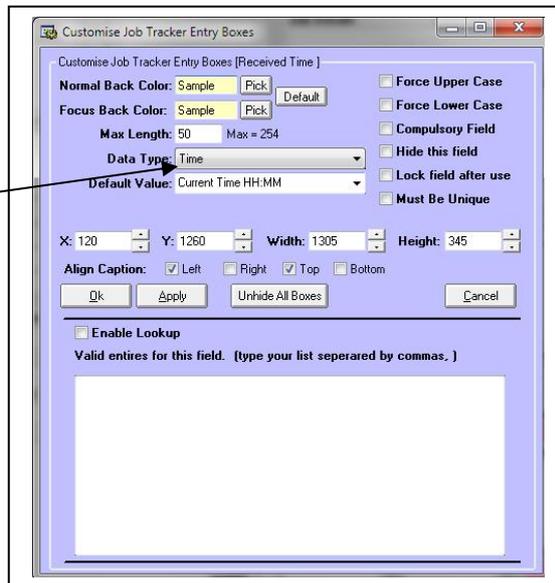
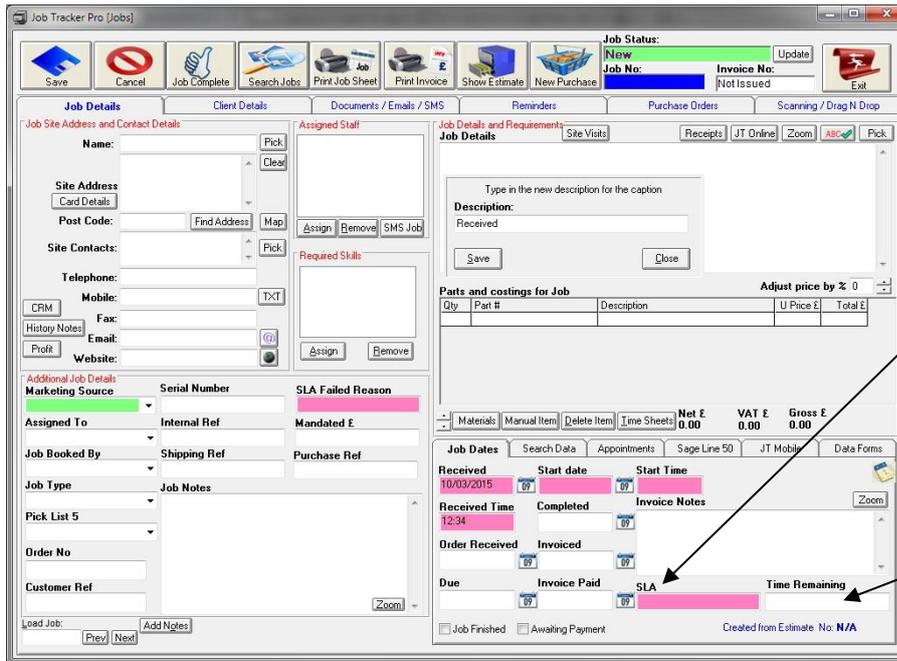


Figure 2

To change the type of data captured within a field press both the Ctrl and Shift key and left mouse click in the field to be changed. This window will appear, you can then click on the down arrows to change data type to 'Time' and set the default value to auto-populate with the current time.



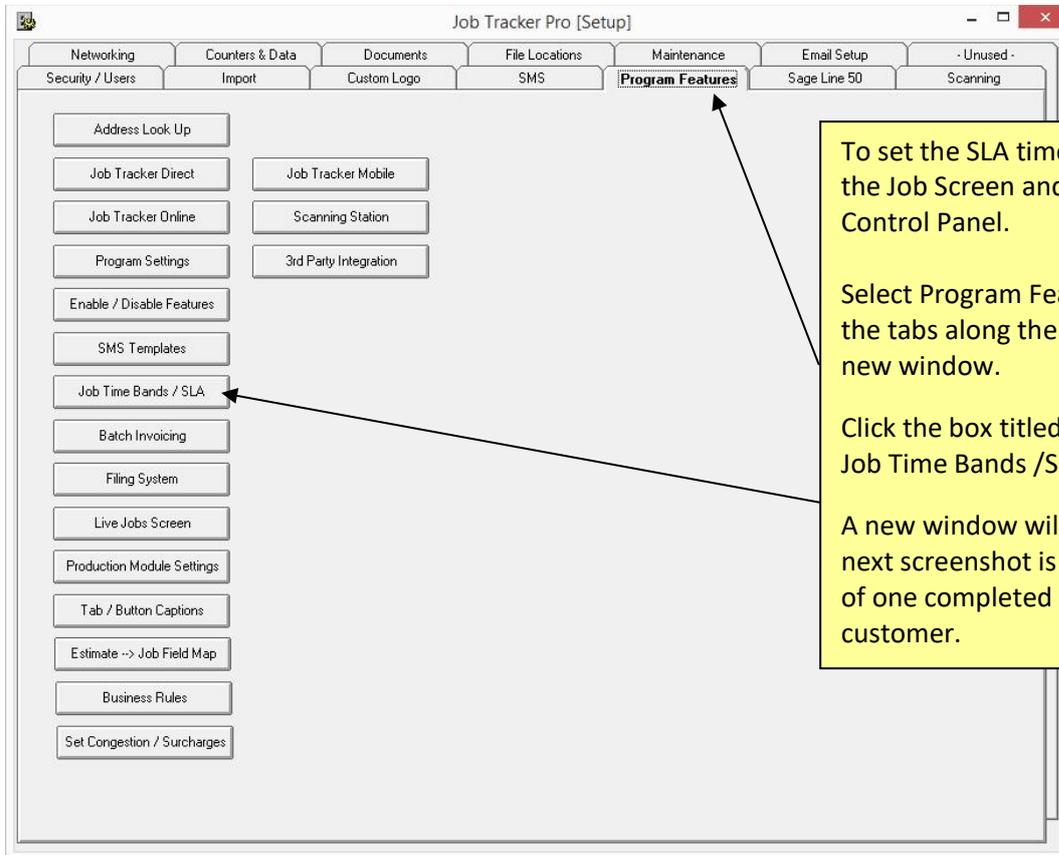
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As a company you set your own service levels and these can differ depending on job type if you wish.

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 auto-populate utilising the chosen time band and the job received time.

Figure 3



To set the SLA time bands, exit the Job Screen and access the Control Panel.

Select Program Features from the tabs along the top of the new window.

Click the box titled Job Time Bands /SLA

A new window will appear. The next screenshot is an example of one completed by a customer.

Figure 4

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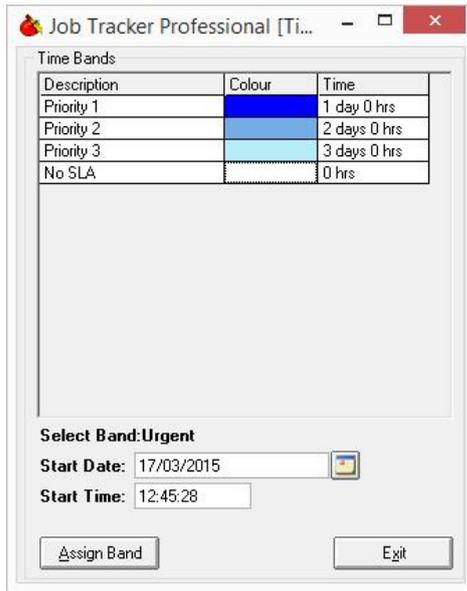


Figure 5 here, is an example of the time bands screen once completed to a customer's requirements. This is how the window will appear when clicking on the SLA field within the Jobs screen (highlighted in figure 3)

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 for selection as illustrated in figure 5 above.

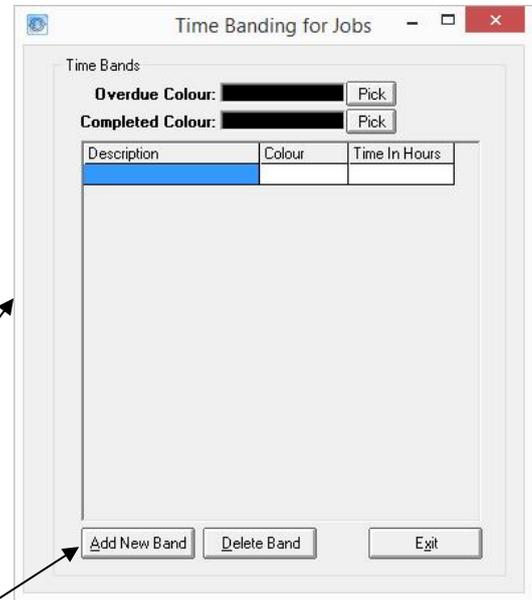


Figure 6

To set the time bands, click Add New Band, a new pop up appears for you to populate see figure 7.

At the top of this screen click 'Pick' next to the Overdue Colour field and choose from the palate. Then repeat this for Completed Colour. These colours will show on the Live Jobs reports.

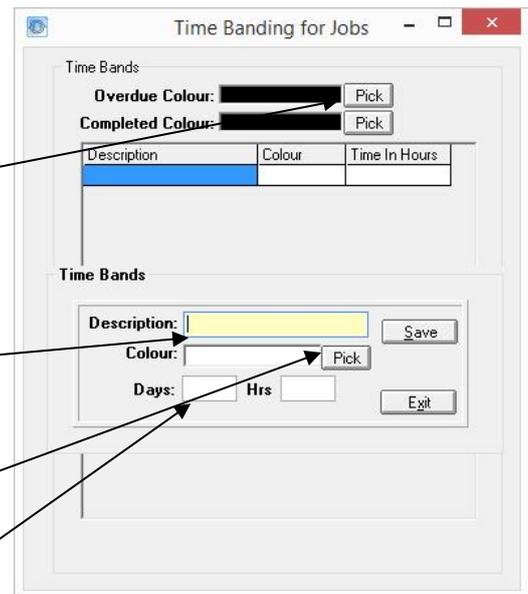


Figure 7

In the description field, enter the details as you wish it to appear via the Job Screen, (this could 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 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.

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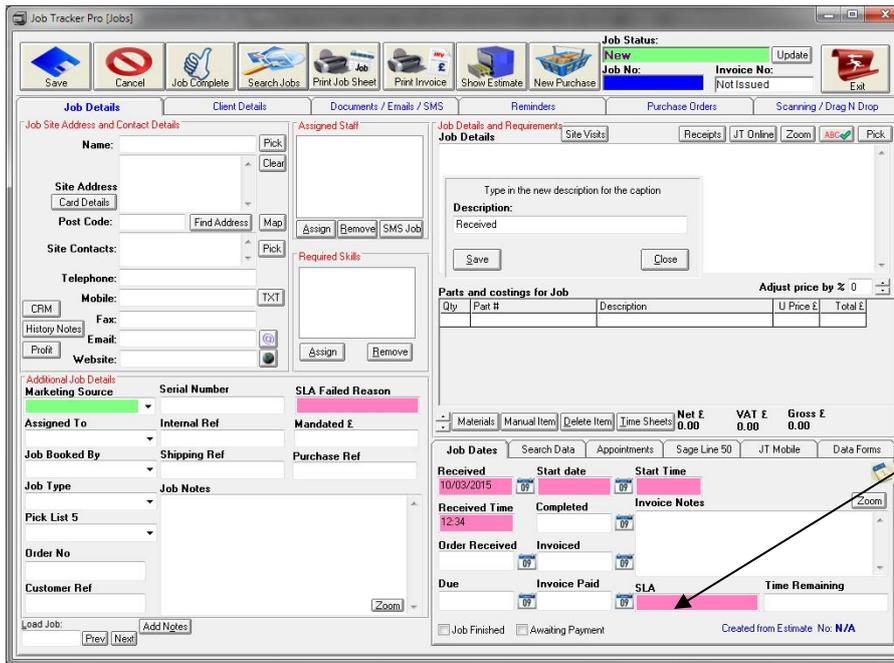


Figure 8

Once the time bands have been added in Control Panel, the service levels can then be selected from within the Job Screen. Double click in the SLA field within the Job Screen.

A window similar to that in figure 9 will appear showing your available time bands. To assign a time band or service level, simply click on the time band that you wish to apply, this should highlight the line, then click Assign Band.

The SLA field will then be populated with the service level time, in this case 2 days. The time remaining box then starts a countdown.

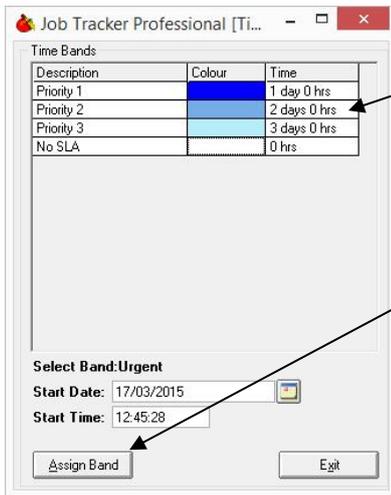


Figure 9

In order to fully maximise the benefits of assigning and recording your adherence to service levels it would be advantageous to make the completion of the SLA field compulsory. To do this, within the Job Screen, press both the Ctrl and Shift key and left mouse click in the SLA field. In the new pop up window click in the 'Compulsory Field' box. Click Apply and close the window.



Figure 10

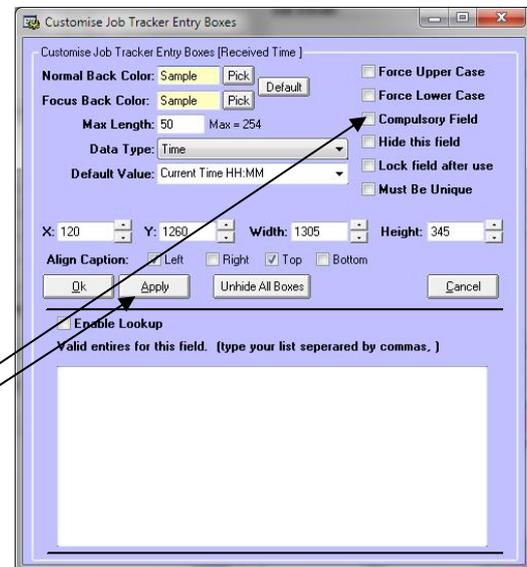


Figure 11

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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.

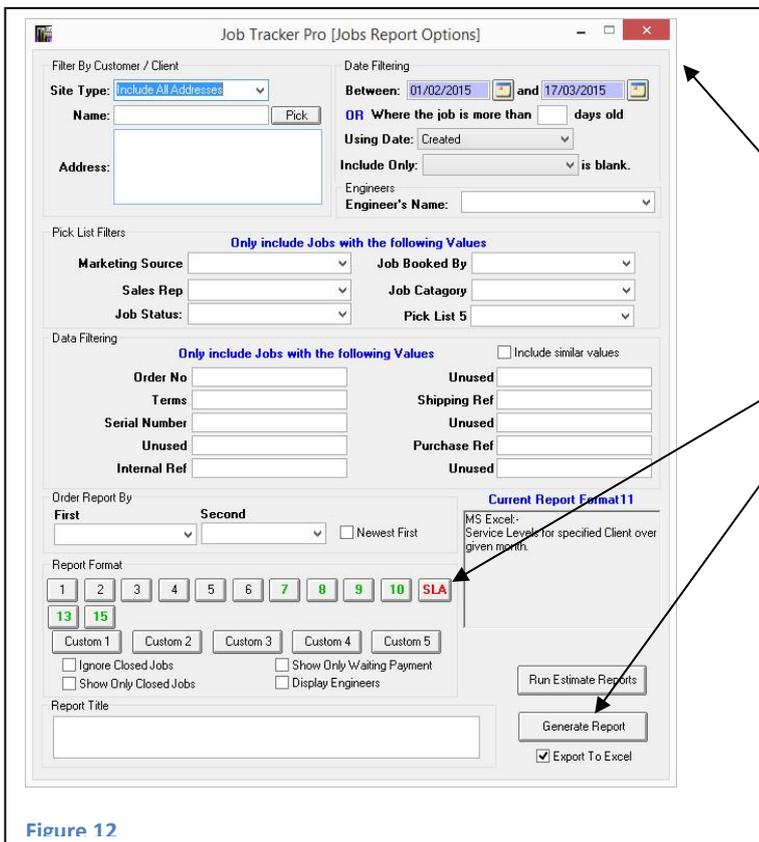


Figure 12

To run such a report, from 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.