SysAid™

Service Level Agreement
Service Level Management
(SLA/SLM)
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Welcome to the SysAid Service Level Agreement/Service Level Management (SLA/SLM) module!

Today's technology users are more demanding than ever, and for good reason. Reliance upon IT for critical company infrastructure, desire for 100% uptime, and the simple fact that almost every single person in a company has a computer means that IT staffs are responsible for an ever increasing portion of a company's well-being. Companies need to be able to depend upon their IT staffs to provide a high level of service. After all, if the e-mail server is down, the primary method of communication for nearly all workers is disrupted. If a user's keyboard breaks, they can't continue working until they receive a new one. The importance of IT staffs has led many companies to implement standards for IT availability and response time. These standards for IT performance are called Service Level Agreements.

More specifically, a Service Level Agreement is a contract that specifies the quality and speed of service that the IT team is expected to provide. For example, a company's SLA could specify that a particular server cluster must experience 100% uptime. In this case, the IT staff would spend extra time and money ensuring that this server cluster never experiences a failure. There could be another component of that SLA which says that any problem that prevents a user from doing their job, such as a keyboard or monitor failure, must be resolved within 1 hour. Sometimes a company will have different SLAs for different users, specifying that the same situation be handled differently depending upon who asks for the service. An example of this would be a VIP receiving faster response times than other workers. A company can have many different SLAs, or only one SLA that covers all aspects of their IT service operation. Regardless of how many SLAs a company has and of how they are set up, SLAs are only relevant if IT follows them.
The measurement of IT conformance to SLAs within a company is called Service Level Management.

SysAid’s Service Level Agreement (SLA) / Service Level Management (SLM) module allows you to define SLAs for your company within SysAid according to the agreements you follow today. SysAid SLA/SLM gives you the flexibility you need to take the complex SLAs of your IT staff and implement them in a form where they can be measured and reported on automatically. You can easily see deviance from predefined SLAs, as well as outstanding performance. Most importantly, SysAid offers you the in-depth detail you need to analyze the root cause of SLA non-conformance and to make sure that your service level is always the best.

The following help files are designed to help you understand and use SysAid SLA/SLM.

**How to use these help files**

The different components of SysAid SLA/SLM are all related, and the order in which you set things up matters. For that reason, we have created a recommended path you take through the help files to learn how to configure and use SysAid SLA/SLM.

**Part 1: Defining SLAs**

1. Create your agreements
2. Input the parameters for your different agreements
3. Assign your users and companies to the appropriate SLAs in Preferences --> User Management

**Part 2: Measuring performance against SLAs**

1. Look at an example to understand measurements within SysAid
2. Decide what you need to measure. Keep in mind that SysAid comes preconfigured with 13 measurements that will cover many of your needs (this you do on your own)
3. Define a data set to run your measurements on
4. Specify the calculations to be run on that data set
5. Input performance targets specified by the SLA

Part 3: Viewing performance
1. Determine visual layout of performance results
2. Review your SLA performance

To make your life easier as you configure SLA/SLM:
Many elements of SysAid SLA/SLM are interdependent. Setting up SLAs and measurements within SysAid will be much easier if you plan out your SLA requirements or desired measurements before you start entering them into SysAid.
Creating and modifying SLAs

Go to SLA → Service Agreements.

To create a new SLA, click the new icon.
To modify an existing SLA, click on the SLA in the list.

Important: Once you've finished setting up your different SLAs, make sure to assign your users and companies to the appropriate SLAs. You may assign SLAs to users and companies under Preferences --> User Management.

Which SLA is applied to a service request?

1. SysAid first looks to see if the request user of the service request has an agreement.
2. If the request user has no attached agreement, SysAid will look to see if the request user's company has an attached agreement.
3. If neither the request user nor the request user's company have an attached agreement, SysAid will use the default SLA for the service request.

SLAs are attached to service requests at the time the service request is submitted. Even if the request user of the service request subsequently changes, the agreement for that service request will stay unchanged.
**Note:** If you have only one SLA for your entire helpdesk, you can use the default SLA for everything. In this case, there is no need to assign users or companies to an SLA, as they will all use the default SLA.
Defining SLAs

Go to Service Agreements and select an agreement for editing, or create a new agreement.
The following series of tabs allow you to build your service level agreement according to your required specifications. Depending upon your specific SLA, you may or may not need to configure each of these tabs. Read below to find a short description of each tab followed by instructions for configuring that tab.

After you have finished configuring your SLAs as described below, make sure you have attached your users and companies to the appropriate SLA as described in "Creating and modifying SLAs." You're then ready to configure measurements so you can track your SLA performance.

Details  Routing Rules  Priorities  Due Dates  Escalation Rules
Operating Times

This tab allows you to give your SLA a name, or to modify the name of an existing SLA. Click OK or Apply after entering the new agreement name.
Routing rules allow you to have specific service requests automatically assigned to administrators or admin groups without having to even look at them. This is useful in cases where you know in advance who will work on a specific service request.

Routing can be based on:

**Company**: This is the company the request user of the service request belongs to.

**User group**: This is the user group the request user of the service request belongs to.

**Category**: This is the category of the service request.

You can route to administrators and/or administrator groups.

**Note**: Under Preferences --> Service Desk Settings --> General Settings, there is an option to Reroute Service Requests, based on routing rules, when the details of the request change. If this option is checked, then any time either the category or request user of a service request changes, routing rules will be applied again.

To create a new routing rule:
1. Select whether the rule will be enabled or not using the checkbox. If a rule is disabled, it will have no effect.
2. Select the trigger for the rule (refer to list above for your choices).
3. Select the desired administrator and/or administrator group.
4. Click Add at the end of the row.
To modify a rule:

1. Click the modify icon 📝. The line you are modifying will become active allowing you to make changes, and the icons will change to Save and Cancel.

2. Make any necessary changes. To save the changes, press Save. To discard changes without saving, press Cancel.

To delete a rule, click the delete icon 🗑. Please note that there is no delete confirmation, so make sure you are sure you are certain you are deleting the correct line.

Details  Routing Rules  Priorities  Due Dates  Escalation Rules  Operating Times

The priorities tab allows you to specify certain conditions under which a service request will receive a priority other than the helpdesk default priority. You may create a priority rule based upon:

(See screenshot for corresponding numbers)

1. Asset group (e.g. servers): Asset groups can be configured under Asset Management.
2. Individual asset (e.g. your mail server)
3. Company: Company is determined by request user
4. Department (e.g. Finance): You can modify your list of departments from Customize --> Customized Lists
5. Individual user (e.g. your CEO)
To create a new priority rule:

1. Select whether the rule will be enabled or not using the checkbox. If a rule is disabled, it will have no effect.
2. Select the trigger for the rule (refer to list above for your choices).
   - To select an individual user, click on the ellipses icon under the user field.
   - This will open the select user screen, allowing you to choose a user.
3. Select the desired priority. See customized lists for setting up your priorities. See below for an explanation of priority = urgency and similar options.
4. Click Add at the end of the row.

To modify a rule:

1. Click the modify icon. The line you are modifying will become active allowing you to make changes, and the icons will change to Save and Cancel.
2. Make any necessary changes. To save the changes, press Save. To discard changes without saving, press Cancel.

To delete a rule, click the delete icon. Please note that there is no delete confirmation, so make sure you are sure you are certain you are deleting the correct line.
Priority = Urgency, etc.

When setting up priority rules, you have the option to choose Priority = Urgency, Priority = Urgency + 1, Priority = Urgency -1, etc. As you remember, urgency is chosen by the end user, so selecting one of these options means that the priority will also be determined by the end user. Keep in mind that Priority = Urgency + 1 will result in a priority which is lower than urgency, and Priority = Urgency -1 will result in a priority which is higher than urgency. Refer to the charts below for a visual representation of your options.

<table>
<thead>
<tr>
<th>Priority = Urgency</th>
<th>Priority = Urgency + 1 (priority is lower than urgency)</th>
<th>Priority = Urgency - 1 (priority is higher than urgency)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Urgency</td>
<td>Priority</td>
<td>Priority</td>
</tr>
<tr>
<td>Urgent</td>
<td>Highest</td>
<td>Highest</td>
</tr>
<tr>
<td>Very High</td>
<td>Very High</td>
<td>Very High</td>
</tr>
<tr>
<td>High</td>
<td>High</td>
<td>Normal</td>
</tr>
<tr>
<td>Normal</td>
<td>Normal</td>
<td>Low</td>
</tr>
<tr>
<td>Low</td>
<td>Low</td>
<td>Low</td>
</tr>
</tbody>
</table>

These options will behave in the same manner if you add or remove entries to your priority and urgency lists.

Due date rules will automatically assign due dates to your service requests. Any service request that matches all of the requirements in one of your due date rules will automatically receive the due date you specify here.

Please note that the calculation of due dates is based on the operating times of the specific agreement (see operating times below). If, for example, a ticket is submitted with a due period of 6 hours, but there are only 3 hours of operating time left in the day, then the due date will be 3 hours after the start of the next operating day.
**Calculate due dates only on new incidents:** If this box is checked, due date rules will only be applied at the creation of new service requests. If this box is unchecked, due date rules will be applied any time a service request is changed so that it matches one of your due date rules.

To create a new due date rule:
1. Select whether the rule will be enabled or not using the checkbox. If a rule is disabled, it will have no effect.
2. Select the trigger for the rule. You can use any combination of category, urgency, priority, and company.
3. Enter a due period in hours.
4. Click Add at the end of the row.

To modify a rule:
1. Click the modify icon 🔄. The line you are modifying will become active allowing you to make changes, and the icons will change to Save and Cancel.
2. Make any necessary changes. To save the changes, press Save. To discard changes without saving, press Cancel.

To delete a rule, click the delete icon 🗑. Please note that there is no delete confirmation, so make sure you are sure you are certain you are deleting the correct line.
Details   Routing Rules   Priorities   Due Dates   Escalation Rules
Operating Times

For a full description of escalation rules, please see the full user manual.

Details   Routing Rules   Priorities   Due Dates   Escalation Rules
Operating Times

The SLA operating time configuration specifies the operating days and hours of the help desk for your SLA. Holidays can be specifically excluded. Due dates, escalation rules, and timers will use these definitions.
Modifying an operating time configuration

1. Choose the days and hours that your helpdesk operates for the currently selected company or SLA (enterprise only).
   • You are allowed one break in the middle of the day, as denoted by the times before and after the comma.
   • For ease of configuration, you can copy your operating times for Monday to all the other days of the week using the "Set All" button.
   • If your helpdesk is closed on any days of the week, you can uncheck the box next to that day so that timers won't run.

2. The exclude dates list allows you to input any dates where you do not work your normal operating hours (such as a holiday). Press Add after inputting a date.

Make sure to hit "Save" after you are done to save your changes.

As with any management process, Service Level Management involves two components: providing the service and measuring performance. You have already learned how to use SLAs to provide the service you require. The following sections explain how SysAid allows you to measure your performance against your SLAs. For a detailed explanation of any SysAid page referenced below, please click on the associated hyperlink.
Measuring Service Levels

Measuring service levels in SysAid involves creating data lists and then specifying the measurements to be performed on those lists. As this is a multi-step process, we will walk through one of SysAid's predefined measurement so that you can see how everything ties together. In our example, we will assume that our company has one SLA for everybody.

Choosing a measurement

The first thing we must do is choose a component of our SLA to measure. Let's say that our SLA specifies that we must have a technician review all new incident service requests within 30 minutes of the time they're received. During this review process, the technician assures that the priority and category is correct, attaches any related asset or CI, and then changes the ticket status from New to Open. We now want to review all of our closed incidents and measure our compliance with this component of our SLA.

Start by going to SLA --> Measurements. Here you will see a list of all the predefined measurements that come with SysAid, as well as any others you may have added. Click on the Average time to respond measurement.

![Table]

You will now be at the Edit Measurement screen with the Average time to respond measurement open. As you can see in the screenshot below, this predefined measurement is already titled, enabled, and attached to the Default SLA. The first thing we need to do is to create a data set, called a Measurement list, which will reflect what we are looking to measure.
Defining a data set to measure

As you recall, we've decided to measure the time it takes for technicians to first review new service requests. How can this be accomplished? Note that the final step of this review process is to change the service request status from **New** to **Open**. If you remember, SysAid has timers that can track the amount of time a ticket spends in any given status (or combination of statuses). One of the default SysAid timers is **Time to respond** (Status = New). Therefore, the time the service request has spent in status **New** (before the technician changed it to **open**) has already been measured for you! When the technician changes the status from **New** to **Open** at the end of his initial review, it will stop the timer, giving you exactly the data you need. All that's left to do is to create a list that will pull the **Time to respond** from all of your service requests. Fortunately, this list has already been created for you. Let's take a look at it now.

Go now to **SLA --> Measurement Lists**. Click on the **Time to respond** list.
You should now be looking at the edit screen for the **Time to respond** list (see screenshot below). As you can see, this screen allows you to choose the data to report on.

We decided that the **Time to respond** timer would have the data we need, so we've chosen that database field. For reporting, we want to see results for closed tickets, so we've chosen reporting date based on **Close time** and service request status class **Closed**. We want the report to run on all tickets with a **closed** status class, so there is no need to list specific statuses. Lastly, this specific SLA applies only to incidents. If it were necessary, the expression builder could be used to filter the data even further, but in our example it's not necessary.

![Edit list - Time to respond (Timer2)](image)

You now have a list of all data values from the **Time to respond** timer for closed incidents. Return now to the **Average time to respond** measurement we looked at above.

**Configuring a measurement**

As you can see, you now have a list available to run measurements on. The question now is which calculation to use. For measuring overall technician
response time, it makes the most sense to use an average, so that’s what we’ve chosen. Timers report their values in milliseconds, so the units listed is ms for milliseconds. We would like to see results on a monthly basis, so we’ve chosen Monthly for our test interval. Parent measurement and weight affect overall reporting and are covered more in-depth on the measurement edit page.

At this point, you can hit the recalculate button. If you have any closed service requests in your SysAid**, you will see the average time to respond listed here in milliseconds (values will be calculated automatically once a day, so there’s no need to use this button on a regular basis). Congratulations! You’ve now measured your helpdesk time to respond, as indicated by the amount of time your incident service requests spend in status New. All that remains is to measure this value against your SLA.

**Only service requests created after you added the SLA/SLM module to your SysAid have an attached agreement and are included in measurements.**
Measurements Vs. SLAs and internal goals

Let's recall now that our SLA specified that time to respond should be 30 minutes or less. In addition to our SLA, we also have an internal goal used to motivate performance. Our internal goal is time to respond of 15 minutes.

As you can see in the screenshot above, SysAid gives you three columns for you to record your SLA performance, your internal goals, and the corresponding grades. The SLA column should have values that correspond to your SLA, such as optimum time of 30 minutes**, warning time of 40 minutes**, and critical time of 50 minutes**. The internal goals column will have similar figures, although they should be more aggressive to motivate performance (e.g. 15 minutes**, 25 minutes**, 35 minutes**). The grade column simply has a percentage grade corresponding to the internal goal or SLA on that line. A measurement that falls between two of the listed values (e.g. average time to respond of 38 minutes) will fall somewhere between the two corresponding grades. Your current grade is on the fourth line of the chart.

**You have to make sure that the values you put into the internal goal and SLA fields are in the same format as the measurement. The timer value (time to respond), which you've seen if you hit recalculate, is in milliseconds. We need to translate all of our minute measurements into milliseconds. 1 minute = 60,000 milliseconds. Therefore, 30 minutes is 1,800,000 ms, 40 minutes is 2,400,000 ms, etc.**

Service Level Management

Now that we've configured the measurement and put in appropriate SLA and internal goal values, SysAid will automatically measure your helpdesk performance versus your SLAs and give you a grade based upon your result. Let's take a step back now, and remember that we've configured only one measurement to measure one element of your SLA. In your company, you will likely have many components of your SLA, such as time to repair (time from when a ticket is opened to when it's closed), percentage of tickets resolved by first level support (should be high!), and
more. Go now to SLA --> **Service Management**, and you will see the Service Management Dashboard.

Here, you can quickly and easily go through your different measurements to see individual performances against your SLA and internal goals, and to look for problems or exemplary performance. You can also click on a parent folder to see average performance of all measurements within. In short, SysAid gives you the ability to easily measure SLA performance against all individual components of your SLA, and against your SLA as a whole. You now have at your fingertips the information you need to maintain service level excellence.

This walkthrough was designed to be an overview of measuring SLA performance in SysAid. For specific details about all features and options on each of the pages shown above, please see their individual help pages in the online help files.
Configuring Measurements

Go to SLA → Measurements.
This screen allows you to manage your individual SLA measurements within SysAid.

To create a new measurement, click the new icon. This will take you to the measurement edit screen (see below).

To edit an existing measurement, click on that measurement (not on the checkbox). This will take you to the measurement edit screen.

To delete a measurement, click the checkbox next to the measure(s) you would like to delete and click delete . Click OK on the confirm deletion screen.

You can customize this page to your liking using the cogwheel .

You can export to Excel or to .pdf . If you select records, only the selected records will be exported. If no records are selected, all records will be exported.

You can print this screen using the print icon . You must first select the records to print. If you would like to print all records, click Toggle All and then print.
Measurement Edit

This page allows you to create new measurements for your SLA. Following is an explanation of each field on this page. Click OK or Apply when you've finished to save your work.

If you have not already, please read our measurements overview above to understand how this screen fits into the other components of SLA.

**Agreement**: Determines which service requests will be included in this measurement. Only service requests part of the SLA specified here will be included in the measurement.

Please note that only service requests created after you've enabled the SLA/SLM module will have an attached agreement and be included in measurements.

**Title**: The title of this measurement.
Enabled: Determines whether this measurement will be calculated. Calculation is automatically done once a day.

The following three items reference the screenshot below. The bottom portion of the screenshot is from SLA --> Service Management.

Parent Measurement: The folder that this measurement sits in on the Service Management Dashboard.

Weight: The number of times this measurement is counted when generating the average for a non-calculated parent measurement (see calculated vs. non-calculated below). For example, a non-calculated parent measurement has 4 children, three of which have a weight of 1 and one of which has a weight of 2. The average shown when you click on the parent measurement is as follows: the three measurements with a weight of 1 each comprise 20% of the average for a total of 60%, and the one measurement with a weight of 2 comprises 40%.

Units: The unit of this measurement. As you can see in the screenshot, the units for the average time to respond list is milliseconds. The 1,138,916 ms in the screenshot equals 19 minutes.
Calculated: If a measurement is calculated, it is performing a specific calculation (Formula) on a specific dataset (List) (see screenshot below). The possible formulas are:

- **Average**: Adds up the data values from the list and divides by the number of data values.
- **Minimum**: Displays the lowest data value from the list.
- **Maximum**: Displays the highest data value from the list.
- **Count**: Presents the number of data values in the list. Note that this formula ignores the values of the data entries and just counts the number of entries. (e.g. the list has 3 values: 5, 7, and 20. This formula will return 3, the number of values in the list).
- **Sum**: Presents the sum of all data values in the list.
- **Ratio**: This formula will ask you for two lists. It will use the **Count** formula on each list, and then present the ratio of the number of items in the first list to the number of items in the second list. This formula will return a percentage.

The lists are created by you under SLA --> Measurement Lists.

As an example, the measurement in the top part of the screenshot below calculates the average value for the **Time to respond** list. You can view this list under SLA --> Measurement Lists. You can view the results of the calculation under **Current value** (see below).

If you would like, you can click on **Current Results** to see the current values in the selected list.

**Non-Calculated**: If a measurement is non-calculated, it will show an average of the grades (not the measurement values) of all child measurements. For example, the Incident Management measurement is non-calculated. It has 8 child measurements (see screenshot above). Once SysAid has calculated the grades for these 8 measurements, it will add the grades together and divide by 8. It will show the results under the Incident Management measurement. If you would like, you can give a child measurement a higher **weight** (see above), and then it will be counted multiple times for this measurement.

**Test Interval**: How far back in time to go when measuring the dataset. For example, a monthly test interval will only look at data values collected since the first day of the current month.

**Current Value**: The result of the calculation.
**Last Period Value:** The result of the calculation for the previous test interval. If, for example, the test interval were monthly, this would show the previous month’s data.

**Recalculate:** Update current and last period values using the current list data. Recalculation is done automatically on a daily basis, so there is usually no reason to use this button.

**Internal Goals and SLAs:** These fields represent your performance targets. The SLA fields should include your targets as specified by your SLA, and the internal goals should represent more aggressive, internal performance goals. The values in these fields should be in the same format as the Current value. For example, if you are measuring average time to respond (in milliseconds), the numbers in these fields should be the optimum, warning, and critical time to respond, also in milliseconds. The numbers in gray at the bottom of these two columns are the grade for the SLA and internal goal, respectively.

**Grades:** These are your Optimum, Warning, and Critical grades. Typically, grades will be on a scale of 1 - 100, with 100 being optimum and 1 meaning that the helpdesk is not doing any work. You can change these numbers to use whatever scale you like (i.e. 1 - 10).
Measurement Lists

To configure measurement lists, go to SLA → Measurement Lists.

The measurement lists page allows you to manage your data lists (one list is one dataset). The calculations run by measurements are run on the data lists you specify here.

To create a new measurement list, click the new icon. This will take you to the measurement list edit screen (see below).

To edit an existing measurement list, click on that measurement (not on the checkbox). This will take you to the measurement list edit screen.

To delete a measurement list, click the checkbox next to the measure(s) you would like to delete and click delete. Click OK on the confirm deletion screen.

You can export to Excel, export to .pdf. If you select records, only the selected records will be exported. If no records are selected, all records will be exported.

You can print this screen using the print icon. You must first select the records to print. If you would like to print all records, click Toggle All and then print.
**Editing Measurement Lists**

This page allows you to create new data lists for your measurements. Following is an explanation of each field on this page. Click **OK** or **Apply** when you've finished to save your work.

If you have not already, please read our measurements overview to understand how this screen fits into the other components of SLA.

**Title**: This is where you give your measurement list its name.

**Field Name**: This is the database field that is used for generating the list.

- **Note**: If you will be using this list with either the **Count** or **Ratio** measurement formulas, it doesn't matter which field name you choose, as neither of those functions looks at the contents of the field. They both simply count the number of entries in the list.

**Date based on**: This determines the date assigned to the data value when running the measurement. **Request time** is the time the service request was opened and...
Close time is the time the service request was closed. If you select Close time, SysAid will ignore open service requests when generating the list.

**Status Class:** Only service requests whose status falls into the chosen status class will be included in this list.

**Statuses and their corresponding status classes**

![Statuses and status classes image]

**Include Statuses:** Only service requests with exactly the status(es) you specify will be included in the measurement list you’re building. This allows you to be more specific than just choosing a status class. Leave this field blank to include all statuses in the status class you’ve chosen.

- To add statuses to this field, click on the ellipses button. This will pop up a list of your statuses. Check off the ones you would like, then scroll to the bottom of the list and click OK.

**Service Request Types:** Choose which service request type or types to include in your list. To select multiple entries, hold Ctrl and click on each desired entry. To deselect a selected entry, hold Ctrl while clicking on it.

**Filter Expression:** This allows you to specify even further which service requests will be in your list. After the list has been filtered by status class, status, and request type, SysAid will further filter the list by the criteria you supply here.
Service Level Management

Go to SLA → Service Management.

The service management dashboard is your central location for monitoring your helpdesk performance vs. your SLAs.

You do not enter any data directly into this screen. Rather, this screen allows you to view a collection of measurement results for all the different measurements you've configured, as well as charts of your performance.

In the tree on the left, click on an individual measurement to view results for that measurement.
Clicking on a parent measurement will show you a weighted average of the results of all child measurements (assuming the parent is a non-calculated measurement).

The two charts both show your grade, not the actual measurement value.
• The first chart shows your current grade. The green, yellow, and red zones are determined by the spacing of your optimum, warning, and critical grades, respectively.
• The second chart shows a line graph of your daily grade for the last 60 days.
• All the fields below the two charts are pulled from the measurement you are viewing.

**Expand all:** Displays all measurements in the tree.

**Collapse all:** Completely closes the tree, leaving only the first level open.

**Show data for Measurement:** This list contains all measurements that do not have a **Parent measurement**. A measurement without a parent measurement becomes the first level in a new tree. The only predefined measurement without a parent measurement is Service Management. As you create new measurements and new SLAs, you will likely want to build new trees of measurements.

**Recalculate:** This will refresh all measurements in the currently open tree using the current data. All measurements are recalculated once a day, so you will generally not need to use this button.