

UNIRITA INC.

LMIS on cloud V2.3.1

Operations Guide



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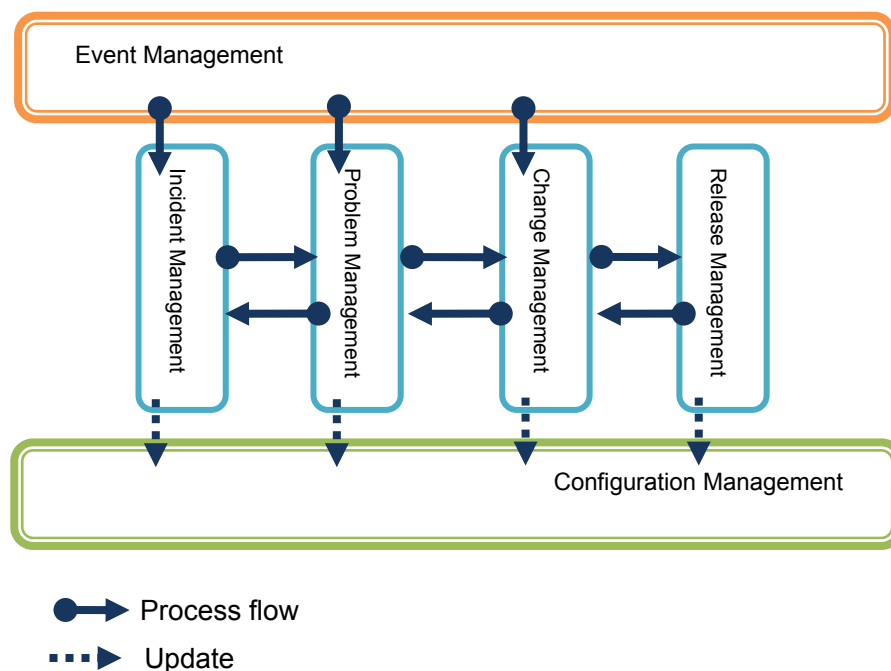
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1. Introduction

This chapter explains the ITIL/Process overview and the scope of this tool.

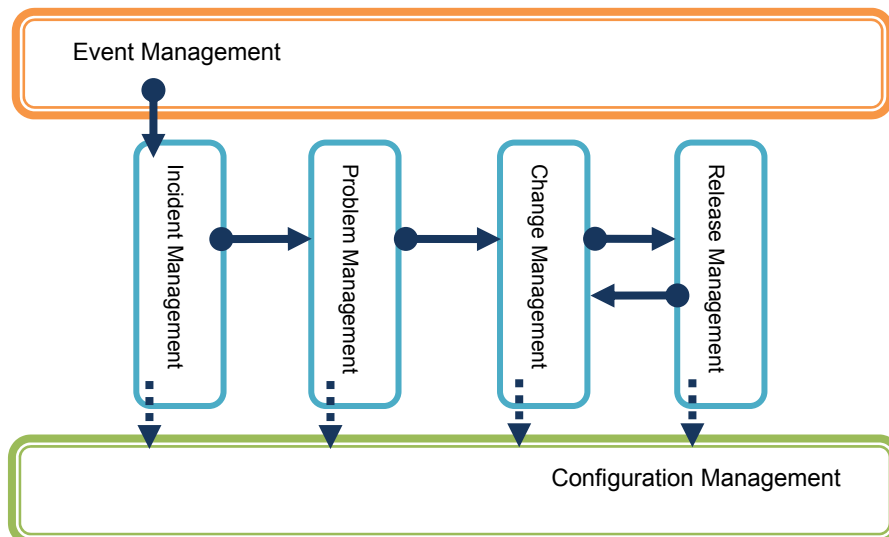
1.1 ITIL/Process Correlation Diagram



The ITIL/Process is a sequenced workflow divided into Event Management, Service Management, Incident Management, Problem Management, Change Management, Release Management, and Configuration Management. Each process connects to the workflow as shown in the graphic above.

◆ **Scope of This Tool**

This tool supports the following process workflow for Event Management, Incident Management, Problem Management, Change Management, Release Management, and Configuration Management.



◆ Description of This Tool

This product is a tool for managing task progress in conformance with ITIL processes.

This allows you to carry out work while confirming that each task is progressing in conformance with ITIL processes.

It registers customer inquiries, internal service issues, assets and other data.

All data registered in this tool is referred to as a "record".

Caution

This product is provided as a Force.com application. Please refer to the *Salesforce User Guide* for information about functions provided on Force.com.

Event Management

This process manages events which occur during the provision of service and the responses to those events.

Events are either accumulated as information or categorized under Incident Management depending on their importance.

This helps ascertain whether the proper support is provided for events that occur to prevent careless support.

Incident Management

This process manages the inquiries regarding products and services as well as the support history. The investigation methods, results and responses to the inquiry are registered as an "incident".

This enables work to be performed while confirming that response deadlines and other inquiry support responses fulfill the level of quality established in agreements.

The content of the inquiries can also be accumulated to create secondary information to be used for internal know-how.

Problem Management

This process manages the investigation methods, results, and permanent support measures by investigating the root cause of an inquiry. If an inquiry is not solved by the investigation during Incident Management, then it is escalated as a "problem".

Registering the method of investigation, results, and support measures establishes a permanent support method in the incident from which it was escalated.

Change Management

This process manages the work and planning which accompanies product and service changes.

Managing the change-related tasks reduces the risk of incident occurrence associated with service changes.

Change requests for products and services can also be received from each management process. Registering the changes in a release after approval and then linking to that release result enables the integration of Change Management and Release Management into one process.

Release Management

This process manages the work and planning which occurs with the release to the production environment.

Managing the accurate application of approved changes to the production environment reduces the risk of incident occurrence associated with the release to the production environment.

Linking to the Configuration Management record also keeps the configuration information up to date.

Configuration Management

This process manages the services that the company provides and the devices, software and documentation that it owns.

Linking to changes or releases automatically updates the configuration information.

2. Basic Description

This chapter explains the terminology, screen displays, and operations required to use the screens.

2.1 Explanation of Terminology

The following explains the terminology required to describe the operation of this tool.

Record

A record is a unit of information registered in Salesforce. Each record is assigned a unique management number.

Object

An object is a unit for saving a Salesforce record. The information for each object can be referenced from the tab.

Apps

An app is a grouping of Salesforce object tabs. Standard tabs can be grouped with the LMIS on cloud tab for management.

Owner

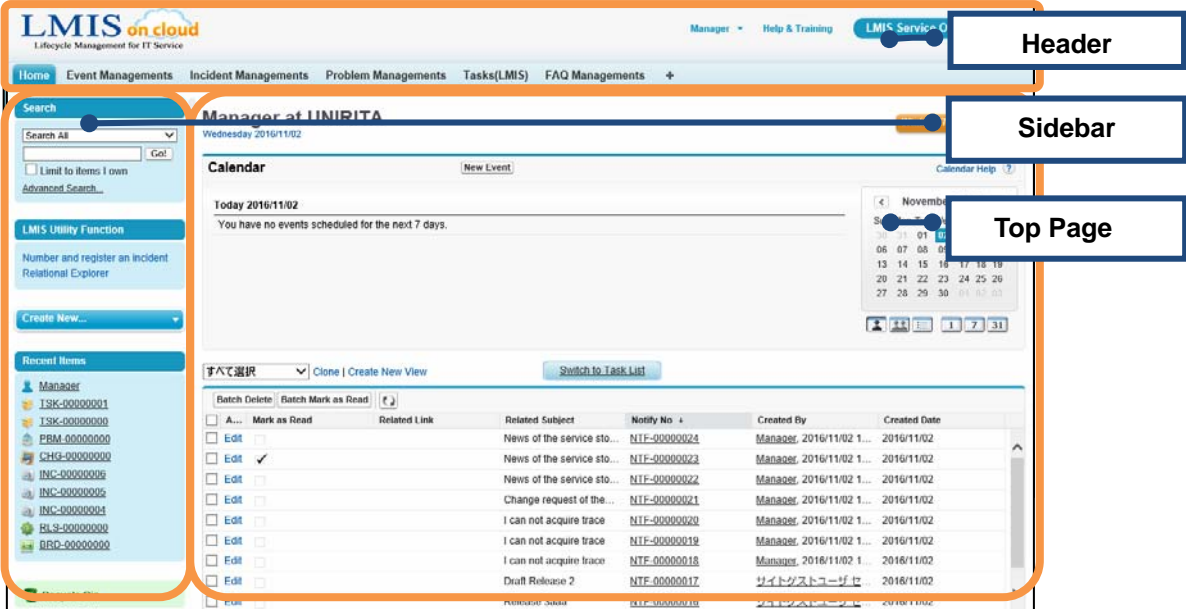
The Owner is the person who manages the implementation of a record.

Approver

The Approver is the person who manages the approval of a record.

2.2 Screen Configuration

The Salesforce Apps screen consists of the following elements.



The following explains the details of each element.

2.3 Header

This section explains the header.

Search Box
Search for registered records using any keyword.
* If the Chatter function is disabled, the Search Box is displayed in the Sidebar.

Help & Training
Show the Salesforce help screen.

Tab
Show the objects included in an app.
Click to go to the object's home page.

Apps Menu
Select an app from the dropdown menu (graphic on the right).
This shows you which apps you can use.

LMIS on cloud
Lifecycle Management for IT Service

Search... Search Administrator Help & Training LMIS Service Operation

Home Event Managements Incident Managements Problem Managements Tasks(LMIS) FAQ Managements +

LMIS Service Operation ▾

- Force.com
- LMIS Configuration Management
- LMIS Dashboard
- LMIS Service Transition
- LMIS Contract Management
- LMIS Management
- AppExchange
- Developer Community
- Success Community

2.4 Sidebar

This section explains the Sidebar.

The diagram shows a sidebar with five main sections. Each section is connected to a callout box with a blue line and a dot. The sections and their descriptions are as follows:

- Search Box:** Search for registered records using any keyword. * If the Chatter function is enabled, the Search Box is displayed in the Header.
- LMIS Utility Function:** Use the convenient functions provided by the product from this link.
- Create New:** Create new objects which are included in apps such as actions and ToDo.
- Recent Items:** Display recently used data.
- Recycle Bin:** For more details, refer to the *Salesforce User Guide*.

The sidebar itself contains the following elements:

- Search:** A blue header with a search dropdown menu (set to 'Search All'), a search input field, a 'Go!' button, a 'Limit to items I own' checkbox, and a link for 'Advanced Search...'
- LMIS Utility Function:** A blue header with two links: 'Number and register an incident' and 'Relational Explorer'.
- Create New...:** A blue header with a dropdown arrow.
- Recent Items:** A blue header with a list of items, each with an icon and a text label: 'Manager', 'TSK-00000001', 'TSK-00000000', 'PBM-00000000', 'CHG-00000000', 'INC-00000006', 'INC-00000005', 'INC-00000004', 'RLS-00000000', and 'BRD-00000000'.
- Recycle Bin:** A green header with a trash can icon and the text 'Recycle Bin'.

2.5 Top Page

This section explains the top page. The Top Page is the screen first shown within the [Home] tab when an app is selected (graphic below). This screen consists of three elements.

The screenshot shows the 'Manager at UNIRITA Inc.' interface. It is divided into three main sections, each highlighted with an orange border and a callout box:

- Calendar:** Located at the top left, it shows the date 'Today 2015/07/22' and a message: 'You have no events scheduled for the next 7 days.' A calendar widget for July 2015 is visible on the right side of this section.
- Portal:** A table listing notifications and tasks. The table has columns for 'Act.', 'Mark as Read', 'Related Link', 'Related Subject', 'Notify No.', and 'Created By'. The first row shows a notification with ID 'NTF-0000000' and subject 'News of the service stop by the...'. The second row shows a task with ID 'NTF-0000001' and subject 'News of the service stop by the...'. The third row shows a task with ID 'NTF-0000002' and subject 'News of the service stop by the...'. The fourth row shows a task with ID 'NTF-0000003' and subject 'Change request of the duties mo...'. The fifth row shows a task with ID 'NTF-0000004' and subject 'I can not acquire trace'. The sixth row shows a task with ID 'NTF-0000005' and subject 'I can not acquire trace'. The seventh row shows a task with ID 'NTF-0000006' and subject 'I can not acquire trace'. The eighth row shows a task with ID 'NTF-0000007' and subject 'test'.
- Dashboard:** Located at the bottom, it displays three donut charts. The first chart is titled 'Record Count' and shows data for 'Corporate portal', 'Payroll calculation', and 'Time and attendance management system'. The second chart is titled 'Record Count' and shows data for 'Open', 'Review', and 'Plan'. The third chart is titled 'Record Count' and shows data for 'Change Management: Owner Name' with categories 'Administrator', 'Manager', and 'Staff'.

*1 Task: refer to "Appendix.2 Task(LMIS) Function".

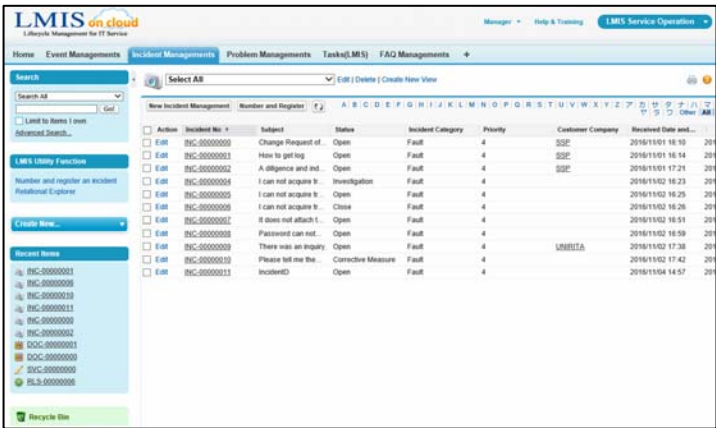
*2 Reports: refer to "12.4 Using the Dashboard".

2.6 View

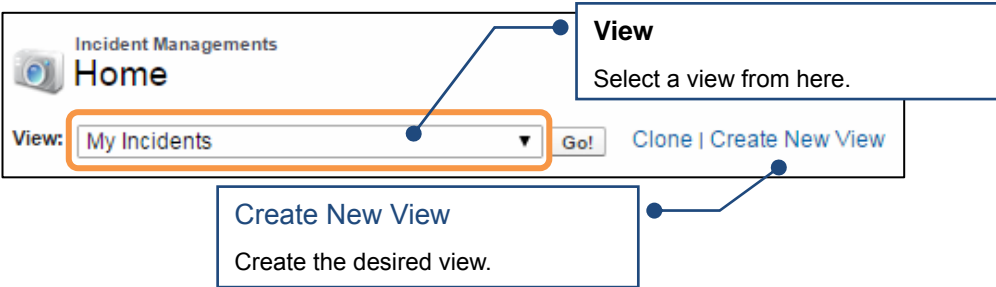
This section explains the view setting.
A view is a setting which combines search conditions and display items.
Change views to display only the desired record.
A view is displayed on the home page of each object.

2.6.1 Displaying a View

- 1. Click a tab.**
The home screen is displayed (graphic below). The home screen is the first screen displayed after clicking a tab.
Recent Incident Managements view is displayed on the home screen.



- 2. Select a view from the dropdown menu in the graphic below.**



The view is displayed.

The screenshot shows the LMIS on cloud interface. The top navigation bar includes 'Home', 'Event Managements', 'Incident Managements', 'Problem Managements', 'Tasks(LMIS)', and 'FAQ Managements'. The 'Incident Managements' tab is active. Below the navigation bar, there is a search bar and a filter dropdown set to 'The primary answer deadline in this week'. A table of incident records is displayed with the following columns: Action, Incident No, Status, Subject, Incident Category, Priority, Customer Company, and Received Date and time. The table contains six rows of incident data.

Action	Incident No	Status	Subject	Incident Category	Priority	Customer Company	Received Date and time
<input type="checkbox"/> Edit	INC-00000000	Open	Change Request...	Fault	4	SSP	2016/11/01 16:10
<input type="checkbox"/> Edit	INC-00000001	Open	How to get log	Fault	4	SSP	2016/11/01 16:14
<input type="checkbox"/> Edit	INC-00000002	Open	A diligence and ind...	Fault	4	SSP	2016/11/01 17:21
<input type="checkbox"/> Edit	INC-00000004	Investigation	I can not acquire tr...	Fault	4		2016/11/02 16:23
<input type="checkbox"/> Edit	INC-00000005	Open	I can not acquire tr...	Fault	4		2016/11/02 16:25
<input type="checkbox"/> Edit	INC-00000006	Close	I can not acquire tr...	Fault	4		2016/11/02 16:26

Click the label for each item to sort the records in ascending or descending order.
Only one type of item can be specified for sorting.

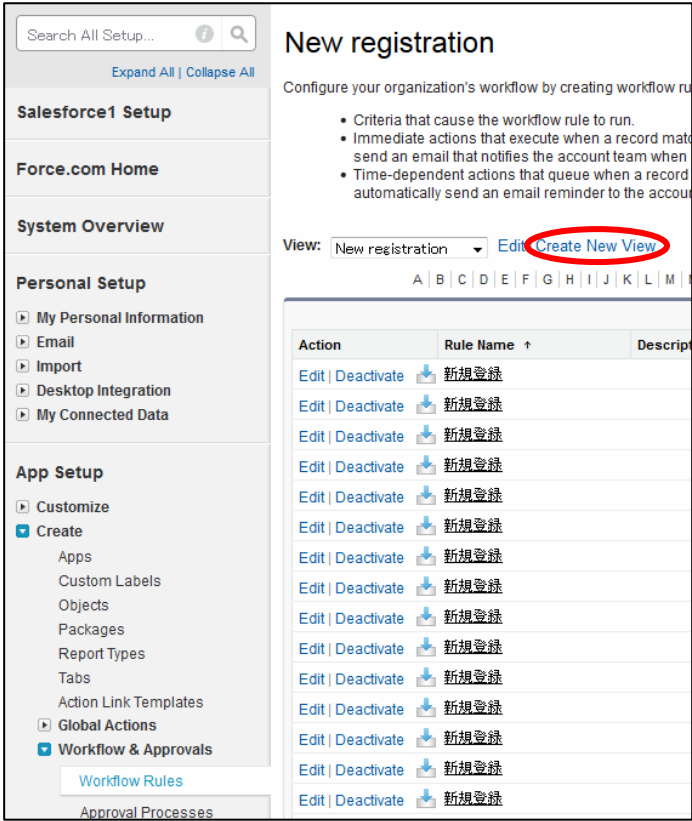
2.6.2 Creating a View

This section explains how to create a new list view to display a specific set of records such as the incidents that you own or the records waiting in the queue. (For more details, refer to the *Salesforce User Guide*.)

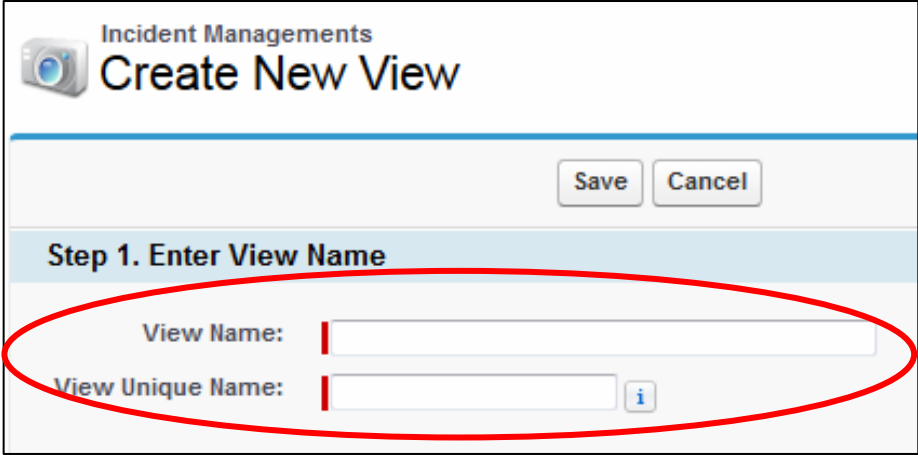
1. To add a new view, click the upper part of any list page or click [Create New View] in the [View] section of any tab home page.

The screenshot shows the 'Incident Managements' home page. The navigation bar is the same as in the previous screenshot. Below the navigation bar, there is a 'View' dropdown menu set to 'Select All' and a 'Go!' button. A red circle highlights the 'Create New View' link. Below the 'View' section, there is a 'Recent Incident Managements' section with a 'New' button and a table of recent incidents.

Incident No	Status	Subject	Priority	Incident Category	Customer Company	Received Date and time
INC-00000009	Open	It does not attach the power supply of the PC	4	Fault	BSP Solutions	2015/07/21 18:56
INC-00000010	Open	Password can not be changed	4	Fault	UNIRITA	2015/07/22 10:24



2. Enter the [View Name] and the [View Unique Name].



Caution

Do not specify a Field Name that begins with the character string "ox_".

- 3. Enter the search conditions to display the record. The search target differs depending on the type of record being searched. In general, select [All...] or [My...] to specify the record to search for.

Field	Record to display
All...	All records
My...	The records that the user owns

Step 2. Specify Filter Criteria

Filter By Owner:

- All Incident Managements
- My Incident Managements

Filter By Additional Fields (Optional):

Field	Operator	Value	
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

[Add Filter Logic...](#)
Select a filter language when using "starts with" or "contains" operators.

Filter Language:

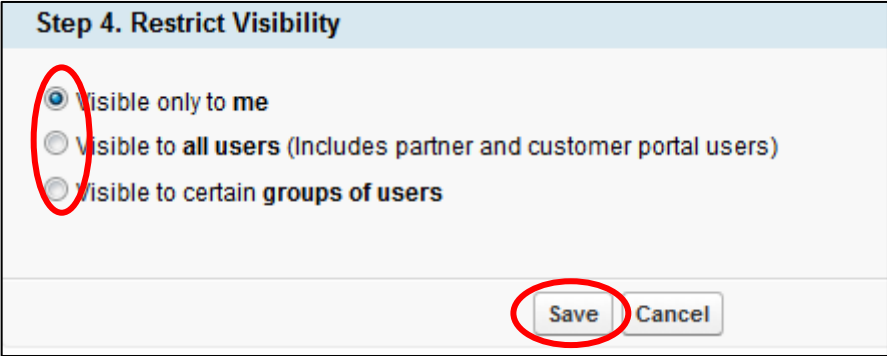
- 4. Select the fields to display in the view. You can select a maximum of fifteen different fields. Select the field you wish to add and click the [Add] button.

Step 3. Select Fields to Display

Available Fields		Selected Fields
Record ID	Add ▶	Incident No
Accept email address		Remove ◀
Apply SLO		
Approval Date and Time		
Approval Execution ID		
Approval Finished		
Approval In Progress Flag		
Approval Requester ID		
Approval Results Notification Dest		
Approval Start Status Value		
Approver		
Approver 2		
Approver 3		
Approver Combination		
Approver Decision		

Top
Up
Down
Bottom

5. Select any [Restrict Visibility] condition and click the [Save] button.



Caution

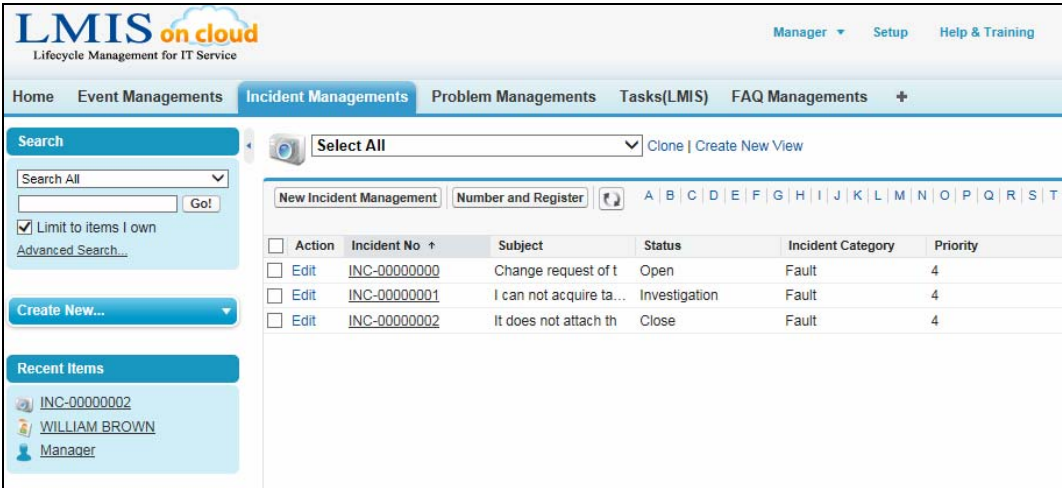
A View created by a user other than the System Administrator can only be accessed by the user who created it.

The System Administrator must create a view that is shared by multiple users.

2.7 Search Box

This section explains the search box.

The search box is located in the sidebar area (refer to section "2.2 Screen Configuration" of this document).



Use [Advanced Search] to select the range of objects and other items to search for. For more details, refer to the *Salesforce User Guide* in "Help & Training".

The search box also supports full text searching. For details about full text searching, refer to section "Appendix.4 Full-Text Search".

Chatter is displayed in the header area if it is enabled, which allows you to also search the Chatter feed and other records provided on Force.com in addition to the records that can be registered in this product.

2.8 Creating, Editing and Deleting Records

This section explains the procedures for creating, editing and deleting records. The operations are the same for all records. Please read this chapter before performing these operations for the first time.

This section also covers the multiple ways to open the new record creation and editing screens.

2.8.1 Creating a New Record

Open the Create New screen and enter a record (items marked in **|** are required).

Incident Management Edit Help for this Page

New Incident Management

Incident Management Edit Save Save & New Cancel

Basic Information | = Required Information

Subject

Status

Inquiry Method

Received Date and Time

Primary Answer Deadline

Substatus

Owner

Target Answer Time

Customer Representative

Customer Company

Details

Investigation Information 2

Urgency

Influence

Priority

Incident Category

Related Information

Investigation Details

Click the [Save] button when the items have been entered.

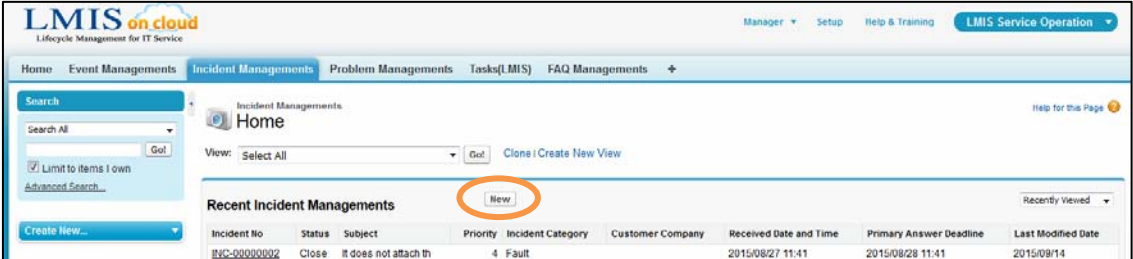
Click the [Save & New] button to enter another record.

Click the [Cancel] button if you do not wish to save the record.

◆ **How to Open the Create New Screen**

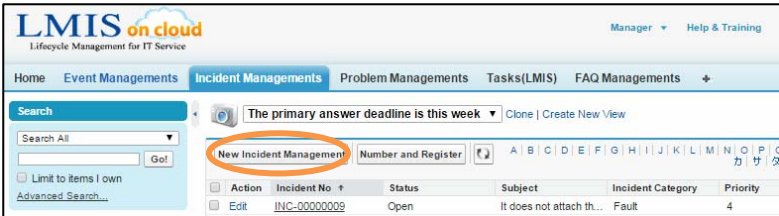
There are four ways to open the Create New screen.

A) Click the [New] button on the Home screen.

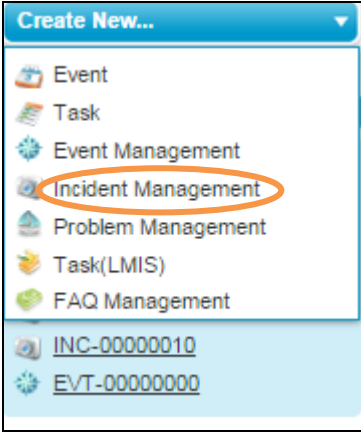


B) Click the [New XX] button in a View.

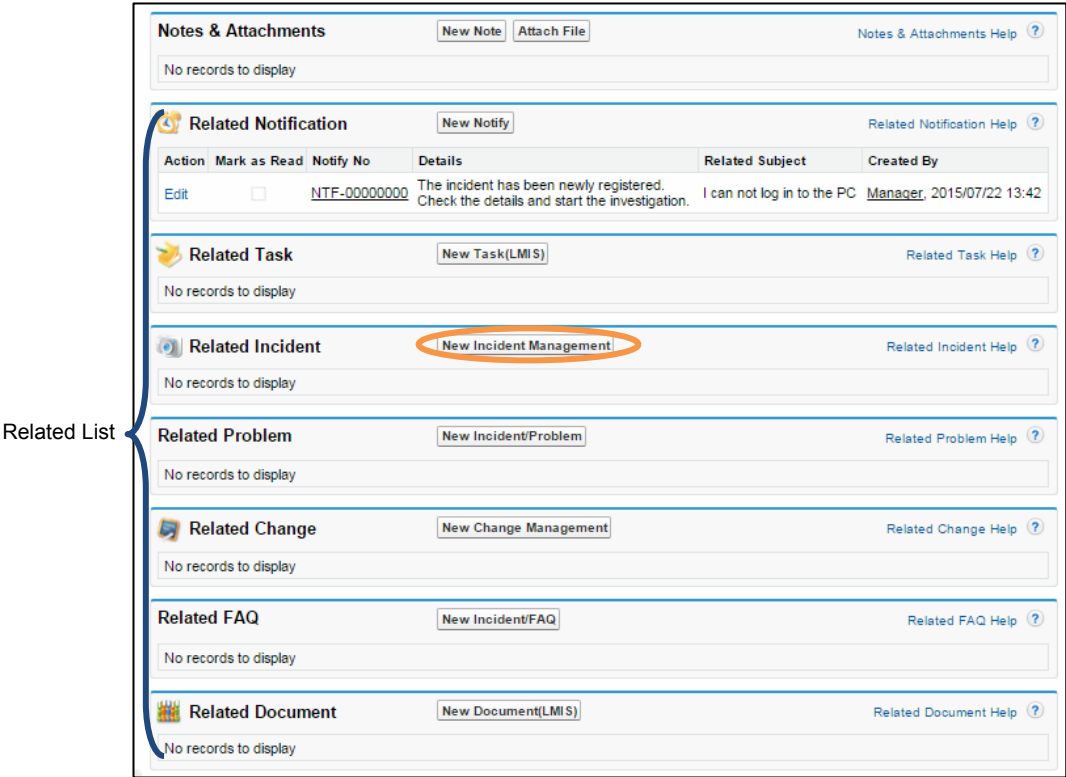
The following graphic shows the [New Incident Management] button.



C) Click the type of record you wish to enter from the [Create New] dropdown list in the sidebar.



D) Click a [New XX] button in the Related List in the lower part of the record detail screen.
The following graphic shows the [New Incident Management] button.



* A new record can be created in relation to that record.

2.8.2 Edit

Open the Edit screen (graphic below) to edit a record.

Incident Management Edit | Save | Save & New | Cancel

Guide
The incident has been registered.
The incident is in the open state.
Check the incident details and start the investigation.
To start the investigation, press the [Investigation Start] button.
To assign the investigation work, register a Task.

Basic Information | = Required Information

Incident No: INC-00000000
Subject: I can not log in to the PC
Status: Open | Substatus: In Progress | Owner: Manager
Inquiry Method: Phone/Fax
Received Date and Time: 2015/07/22 13:41 | [2015/07/22 13:44] | Target Answer Time: 24.00
Primary Answer Deadline: 2015/07/23 13:41 | Customer Representative: []
Customer Company: []

Details: []

Click the [Save] button when the items have been entered.

◆ Opening the Edit Screen

- A) Click the record number on the Home screen. The following graphic illustrates the incident number as an example.

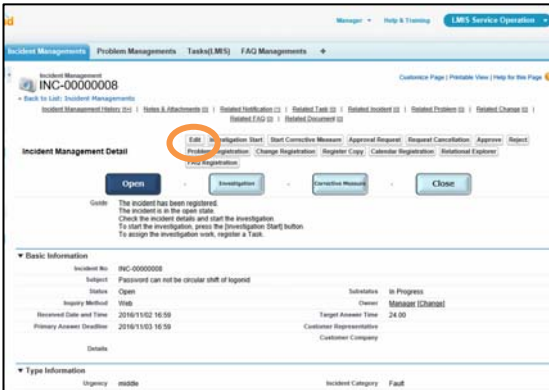
LMIS on cloud
Lifecycle Management for IT Service

Home | Event Managements | **Incident Managements** | Problem Managements | Tasks(LMIS) | FAQ Managements

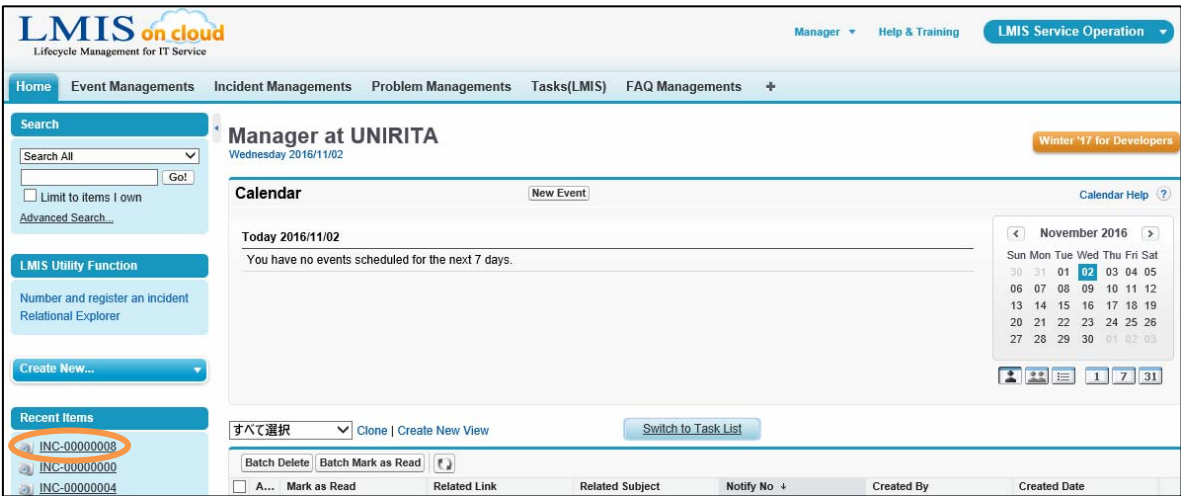
Search: Select All | Edit | Delete | Create New View

Action	Incident No ↑	Subject	Status	Incident Category
<input type="checkbox"/> Edit	INC-00000000	Change Request of...	Open	Fault
<input type="checkbox"/> Edit	INC-00000001	How to get log	Open	Fault
<input type="checkbox"/> Edit	INC-00000002	A dilligence and ind...	Open	Fault
<input type="checkbox"/> Edit	INC-00000004	I can not acquire tr...	Investigation	Fault
<input type="checkbox"/> Edit	INC-00000005	I can not acquire tr...	Open	Fault
<input type="checkbox"/> Edit	INC-00000006	I can not acquire tr...	Close	Fault

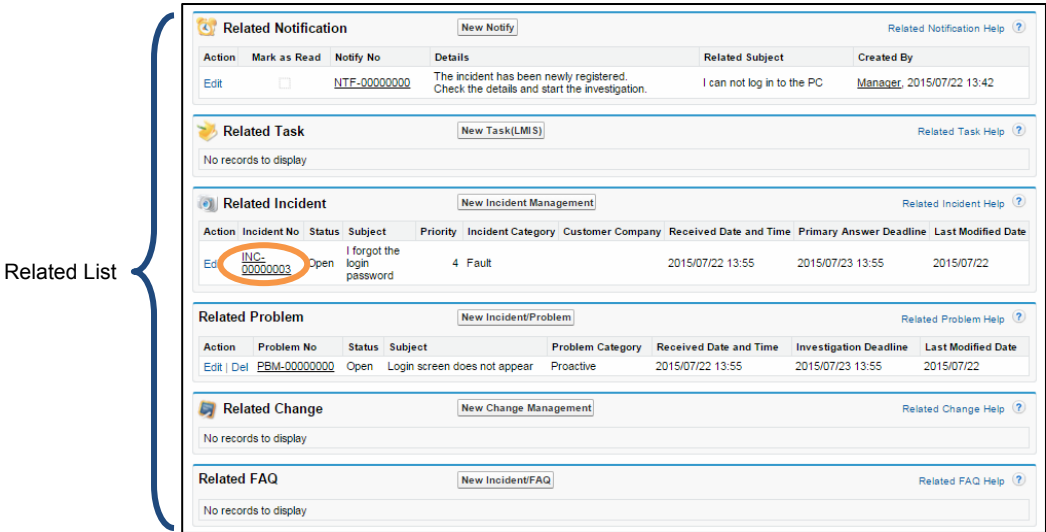
Click the [Edit] button when the detail screen is displayed.



B) Click the record number under "Recent Items" in the Sidebar.



C) Click the record number in the Related List in the lower part of the record detail screen. The following graphic illustrates the incident number as an example.



2.8.3 Delete

Request the System Administrator to delete a record that was accidentally created or is unneeded. The method to make a record deletion request is shown below.

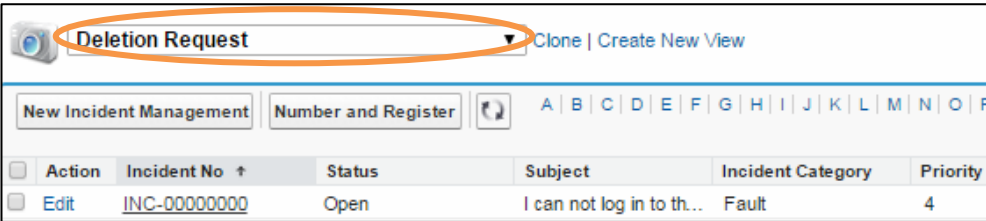
◆ **Making a Deletion Request**

Open the detail screen for the record you wish to delete and check the [Delete Confirmation] box.



Click the [Save] button when the items have been entered.

Confirm the record submitted for the Deletion Request in the Deletion Request view.



2.9 Lookup Search

Click the [Lookup] button to display the Lookup search dialog (graphic below).

The screenshot shows the 'Incident Management Edit' page for incident INC-00000000. The page includes a 'Basic Information' section with fields for Incident No, Subject, Status, Inquiry Method, Received Date and Time, Primary Answer Deadline, Substatus, Target Answer Time, Customer Representative, and Customer Company. A red circle highlights the 'Lookup' button next to the Customer Representative field.

The screenshot shows the 'Lookup' search dialog. It features a search bar with a 'Search...' placeholder, 'Go!' and 'New' buttons, and a note: 'You can use "*" as a wildcard next to other characters to improve your search results.' Below the search bar is a section titled 'Recently Viewed Contacts' with a table of results.

Name	Account Name	Account Site
JOHN TAYLOR	BSP Solutions	
JOHNSON DAVID	ABC Corporation	
WILLIAM BROWN	UNIRITA	

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Results can be narrowed with multiple search conditions when the advanced lookup search is enabled.

For more details about this setting, refer to the *Salesforce User Guide*.

2.10 Record Owner and Approver

Without exception, each record has associated users with the following roles.

Role	Description
Owner	The person responsible for implementing the corresponding record. Staff.
Approver	The person responsible for approving the corresponding record. Manager.

2.11 Control Information

Specify various controls for the corresponding record in Control Information.

Control Information can be confirmed on the detail screen for each record.

The following graphic shows the Control Information in Incident Management as an example.



This section explains each item of Control Information.

Approver Decision Method	Specify the decision process of the "Owner" and the "Approver". Q: The "Owner" or "Approver" can specify the Owner after the record is created. N: The record creator is the "Owner". The Approver is the manager of the "Owner". C: (Only with the Task function *1) The user specified in "Owner: For Work Request" is the task's "Owner". If nothing is specified for "Owner: For Work Request", then the creator is the "Owner". The "Approver" is the manager of the "Owner". *1 For more details, refer to section "Appendix.2 Task(LMIS) Function".
Email Notification	Send an Email to the Owner and the Approver at the same time as an alert notification when the record is updated.
Delete Confirmation	Check to delete a record and send a record deletion request to the System Administrator.
Lock When Closed	Set to prevent editing of the record when the status is closed.
Apply SLO	You can specify the prioritization of the response time registered in the SLO information of the Service, Service Contract. ON: Prioritize the response time registered in the SLO information of the Service, Service Contract CREATEONLY: Prioritize the response time registered in the SLO information of the Service, Service Contract only when registering a new record OFF: Directly register the response time in the incident

Awaiting Task Completion	Do not make an Approval Request until all of the tasks associated with the record are closed.
FAQ Candidate	Check for similar incidents which frequently occur. Checked incidents can be confirmed in the FAQ view.
Email to Customer	Email is automatically sent to the customer (Contact) for each specified status change.
Input Template	Check for similar incidents which frequently occur. Checked incidents can be confirmed in the "Template" view. Incidents can also be easily issued with the "Register Copy" button.
Easy Number	Automatically checked for incidents registered with [Number and register an incident] on the Sidebar. For more details, refer to section "4.2.1 Incident Reception".

2.12 Cautions in the English user

This section describes Cautions when operating in the English user.

- In the English user, there is possibility that error messages contain Japanese text.
Under this circumstances, please contact to System Administrator.
- You can not full-text search in the selection list values in English.

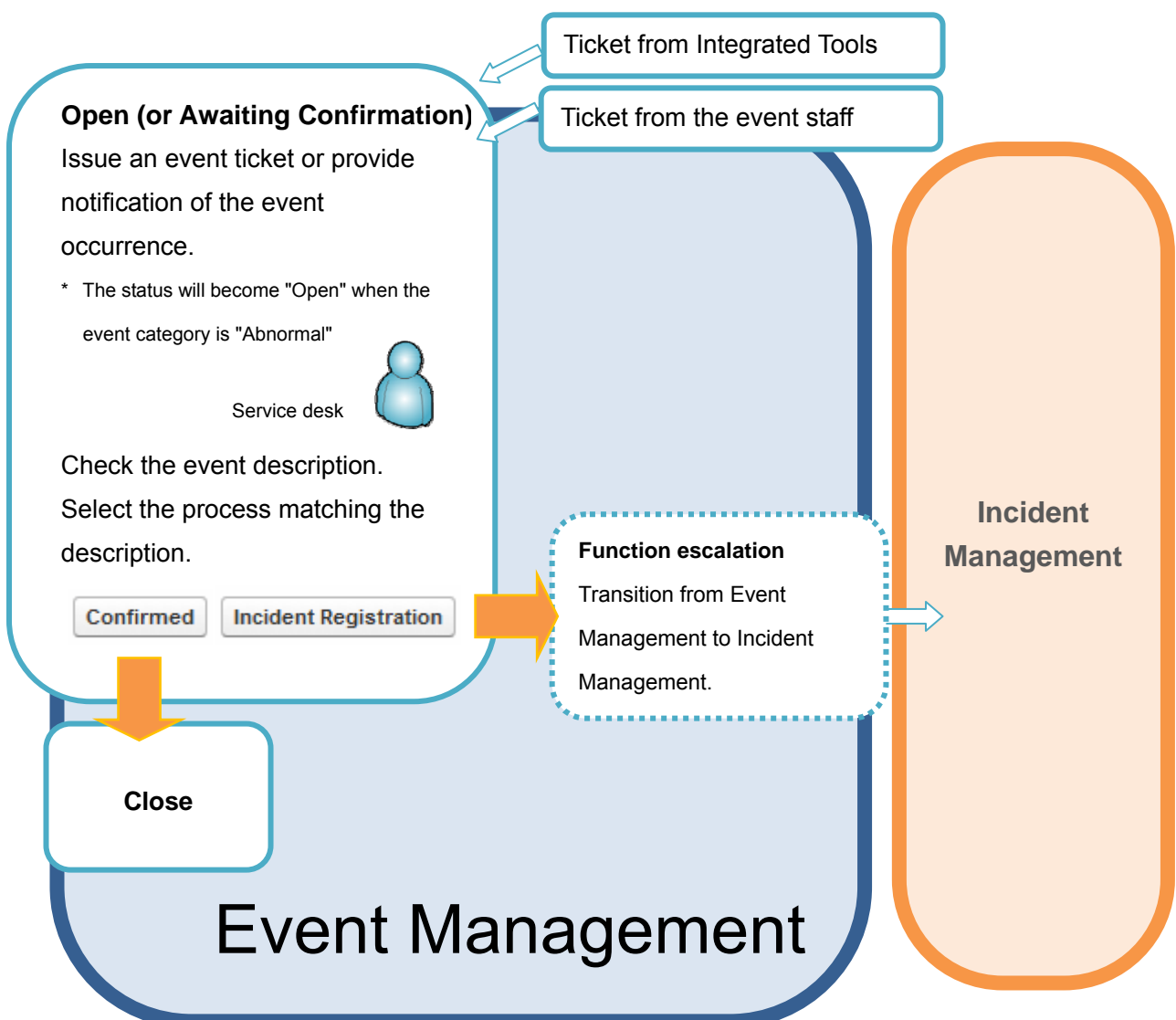
3. Event Management

Event Management manages the information for changes in the status of services and the product. Events in this product are requests or inquiries from users or alerts issued by monitoring tools.

3.1 Workflow Explanation Diagram

This section explains the workflow and each process in Event Management.

The workflow described here is the default workflow provided by this product.



3.2 Event Reception

This section explains the event registration procedure for the service desk manager.

In addition to having a ticket issued by a manager, an event can also be automatically registered from a monitoring tool alert or the contents of an Email by using Integrated Tools. Refer to the "LMIS on cloud 連携ツールガイド" for details about how to use the Integrated Tools.

1. Open the Create New screen.

Refer to the previous section "2.8 Creating, Editing and Deleting Records" for details on how to open the screen.

Event Management Edit
New Event Management

Event Management Edit [Save] [Save & New] [Cancel]

Basic Information [Required Information]

Subject []
 Status []
 Event Category [Information] Owner [Manager]
 Occurred Date and Time [2015/07/22 14:50] Notification Source [User]
 Customer Representative []
 Customer Company []
 Details []

2. Enter the required items.

3. Click the [Save] button.

The entered content is updated in the Event Management detail screen.

Event Management
EVT-00000000

Event Management Detail [Edit] [Confirmed] [Incident Registration] [Relational Explorer]

Basic Information

Event No	EVT-00000000	Owner	Manager [Change]
Subject	There was an inquiry.	Notification Source	User
Status	Awaiting Confirmation	Customer Representative	WILLIAM BROWN
Event Category	Information	Customer Company	UNIRITA
Occurred Date and Time	2016/11/02 17:36		

Details I cannot do it according to installation procedure.

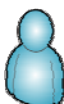
This completes the Event Reception procedure.

3.3 Event Confirm

Next, the service desk staff checks the event.

The staff looks at registered events with unconfirmed contents that were issued by monitoring tools, Email or other staffs and changes the status depending on their content. If no particular action is required, the event is set to "Confirmed". If action is required, a ticket is issued from the corresponding event for incident or problem information.

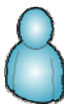
3.3.1 Event Selection



1. **Select the [Event Managements] tab to display the event home screen.**
2. **Click on entries that do not have a status of "Close" in the list of displayed events.**
Refer to the previous section "2.8 Creating, Editing and Deleting Records" for details on how to open the screen.

You can quickly access events which should be confirmed by using the appropriate view such as "All Unclosed Events" or "All Abnormal Event". For more details about how to use views, refer to "2.6 View" in the previous section.

3.3.2 Event Confirm



Look at the event content and if no action is required, then set the status to "Close" after confirming.

1. **Click the [Confirmed] button.**
The event status changes to "Close".

Event Management
EVT-00000000

[Back to List: Incident Managements](#)

[Event Management History \(3\)](#) |
 [Notes & Attachments \(0\)](#) |
 [Related Notification \(0\)](#) |
 [Related Event \(0\)](#) |
 [Related Incident \(0\)](#) |
 [Related Document \(0\)](#)

[Customize Page](#) | [Printable View](#) | [Help for this Page](#)

Event Management Detail

[Edit](#) |
 Confirmed |
 [Incident Registration](#) |
 [Relational Explorer](#)

▼ Basic Information

Event No	EVT-00000000		
Subject	There was an inquiry.		
Status	Close	Owner	Manager [Change]
Event Category	Information	Notification Source	User
Occurred Date and Time	2016/11/02 17:36	Customer Representative	WILLIAM BROWN
		Customer Company	UNIRITA
Details	I cannot do it according to installation procedure.		

▼ Close Information

Close Date and Time	2016/11/02 17:38	Time Until Close	0.02
---------------------	------------------	------------------	------

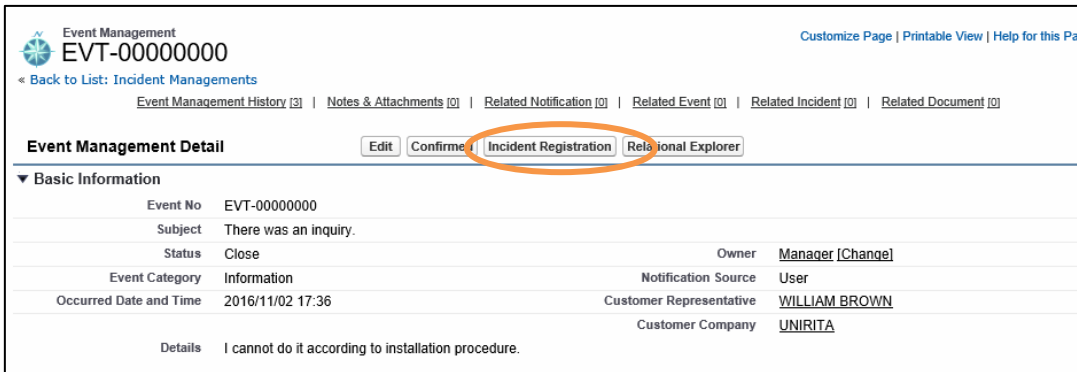
▼ Related Information

Related Event	
Related Event Subject	
Related Service	Related Service Name
Related Hardware	Related Hardware Name
Related Software	Related Software Name

3.3.3 Function Escalation (Incident)

Depending on the event content, related incident information may be registered if an incident response is required.

1. Click the [Incident Registration] button.



Event Management
EVT-00000000

Customize Page | Printable View | Help for this Page

« Back to List: Incident Managements

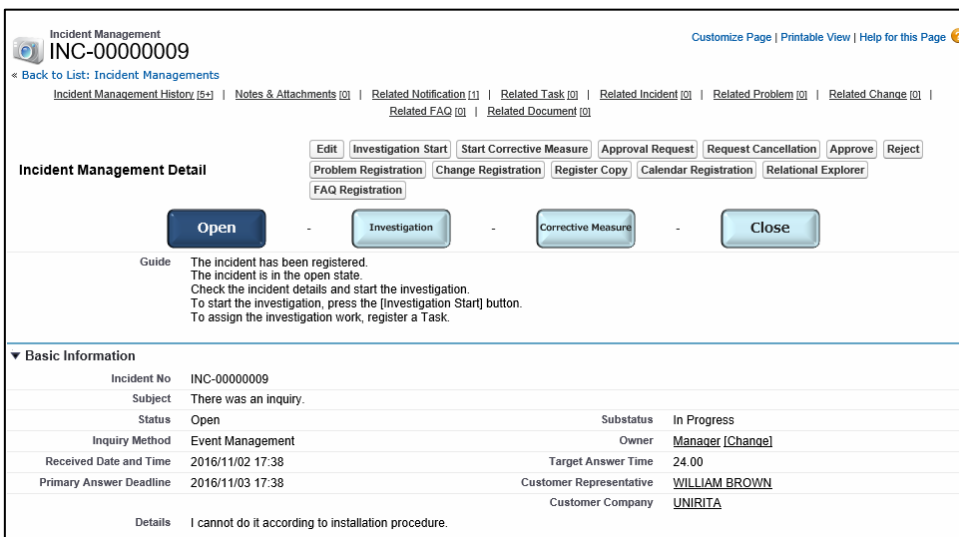
Event Management History (3) | Notes & Attachments (0) | Related Notification (0) | Related Event (0) | Related Incident (0) | Related Document (0)

Event Management Detail Edit Confirm **Incident Registration** Relational Explorer

▼ Basic Information

Event No	EVT-00000000	Owner	Manager [Change]
Subject	There was an inquiry.	Notification Source	User
Status	Close	Customer Representative	WILLIAM BROWN
Event Category	Information	Customer Company	UNIRITA
Occurred Date and Time	2016/11/02 17:36	Details: I cannot do it according to installation procedure.	

The incident was registered with the same subject as the event. For more details about subsequent steps, refer to section "4. Incident Management".



Incident Management
INC-00000009

Customize Page | Printable View | Help for this Page

« Back to List: Incident Managements

Incident Management History (5+) | Notes & Attachments (0) | Related Notification (1) | Related Task (0) | Related Incident (0) | Related Problem (0) | Related Change (0) | Related FAQ (0) | Related Document (0)

Incident Management Detail Edit Investigation Start Start Corrective Measure Approval Request Request Cancellation Approve Reject

Problem Registration Change Registration Register Copy Calendar Registration Relational Explorer

FAQ Registration

Open - Investigation - Corrective Measure - Close

Guide
The incident has been registered.
The incident is in the open state.
Check the incident details and start the investigation.
To start the investigation, press the [Investigation Start] button.
To assign the investigation work, register a Task.

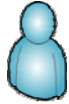
▼ Basic Information

Incident No	INC-00000009	Substatus	In Progress
Subject	There was an inquiry.	Owner	Manager [Change]
Status	Open	Target Answer Time	24.00
Inquiry Method	Event Management	Customer Representative	WILLIAM BROWN
Received Date and Time	2016/11/02 17:38	Customer Company	UNIRITA
Primary Answer Deadline	2016/11/03 17:38	Details: I cannot do it according to installation procedure.	

◆ **Auto populated content**

- Subject
- Details
- Related Event
- Related Service
- Related Hardware
- Related Software
- Customer Representative

3.3.4 Event Batch Confirm



Select events that have been confirmed from the event list and set the status to "Close" all at once.

1. Select the [Event Managements] tab to display the event home screen.
2. Check the selection box to set the status of each record to "Close" in the displayed event list.

Action	Event No	Status	Subject	Event Category	Customer Company
<input type="checkbox"/> Edit	EVT-00000000	Close	There was an inquiry	Information	UNIRITA
<input checked="" type="checkbox"/> Edit	EVT-00000001	Awaiting Confirmation	An event was register...	Information	
<input type="checkbox"/> Edit	EVT-00000002	Awaiting Confirmation	Please confirm it	Information	
<input checked="" type="checkbox"/> Edit	EVT-00000003	Awaiting Confirmation	Contract documents c...	Information	

3. Click the [Batch Confirm] button.

The status of the selected events changed to "Close".

Action	Event No	Status	Subject	Event Category
<input type="checkbox"/> Edit	EVT-00000000	Close	There was an inquiry	Information
<input type="checkbox"/> Edit	EVT-00000001	Close	An event was registered b...	Information
<input type="checkbox"/> Edit	EVT-00000002	Awaiting Confirmation	Please confirm it	Information
<input type="checkbox"/> Edit	EVT-00000003	Close	Contract documents can ...	Information

Caution

The batch confirmation process may fail if the event has many related records. If this occurs, run the batch confirmation with fewer events.

4. Incident Management

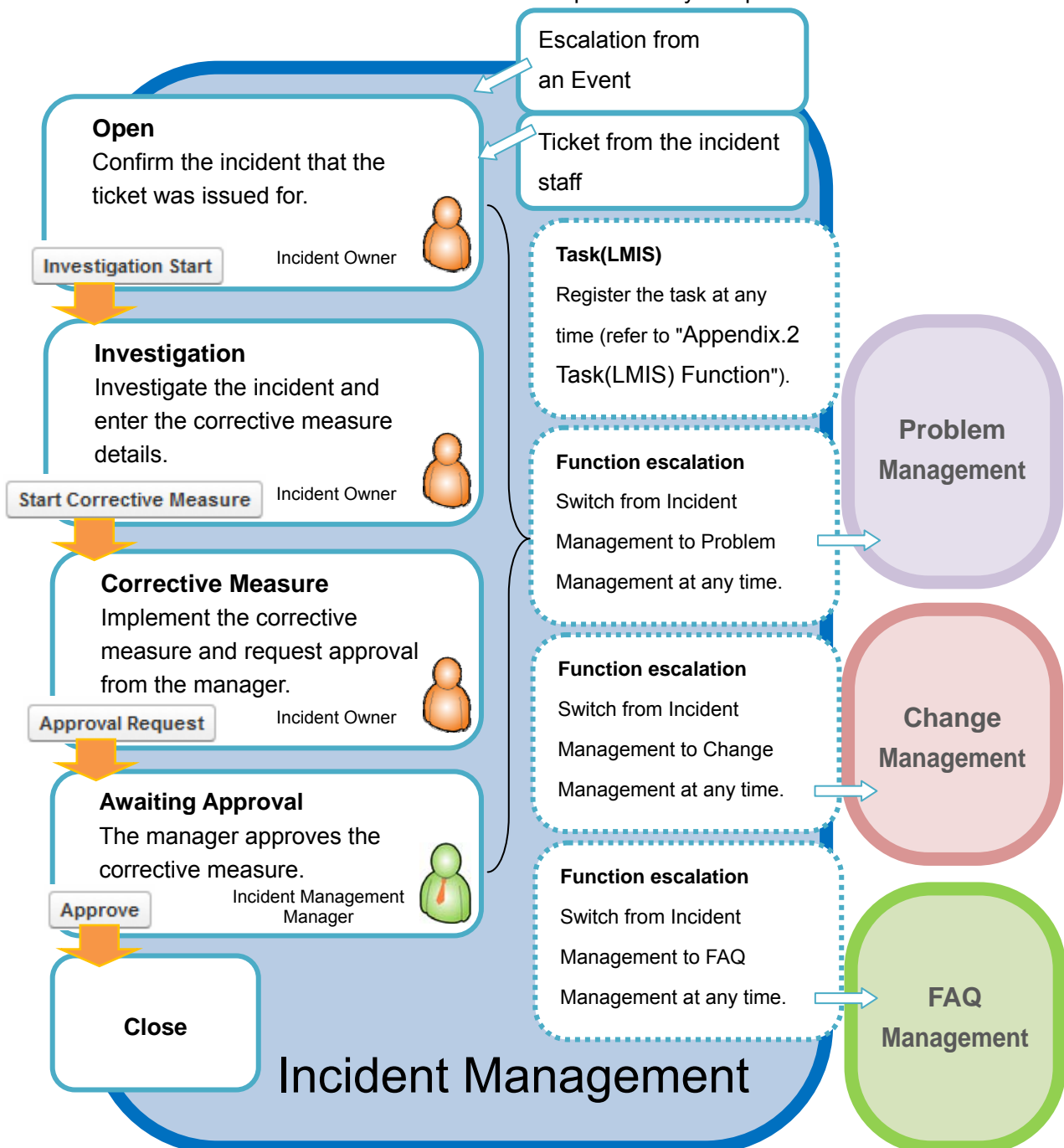
Manage responses to service and product related inquiries in Incident Management.

The following workflow diagram provides a graphical illustration to explain the accompanying management procedure.

4.1 Workflow Explanation Diagram

This section explains the workflow and each process in Incident Management.

The workflow described here is the default workflow provided by this product.



4.2 Reception and Opening

This section explains the procedure from incident reception to the start of the investigation. Reception is the issuing of an incident ticket. List the description of the service and product related inquiry in the incident.

4.2.1 Incident Reception

This section explains the registration of new incident information.

1. Open the Create New screen.

Refer to the previous section "2.8 Creating, Editing and Deleting Records" for details on how to open the screen.

2. Enter the required items.

3. Click the [Save] button.

The entered content is updated in the Incident Management detail screen.

A notification is displayed in the incident Owner's portal explaining that an incident was registered.

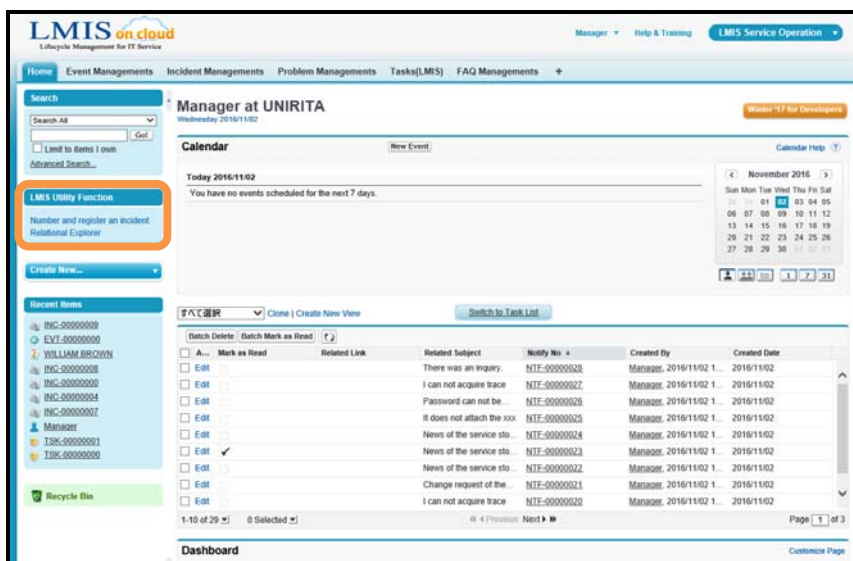
This completes the incident reception.

◆ **Simple Registration**

An incident can be quickly registered from the Sidebar.

A unique incident management number is assigned to a registered incident which is used to immediately relay the reception number to the person filing the incident.

1. Click [LMIS Utility Function]-[Number and register an incident] in the Sidebar.



Click the [OK] button when the message is displayed.

Open the Incident Management edit screen.

Incident Management Edit
INC-00000005

Incident Management Edit [Save] [Save & New] [Cancel]

Guide
The incident has been registered.
The incident is in the open state.
Check the incident details and start the investigation.
To start the investigation, press the [Investigation Start] button.
To assign the investigation work, register a Task.

Basic Information | = Required Information

Incident No: INC-00000005
 Subject: Easy Number
 Status: Open
 Inquiry Method: --None--
 Received Date and Time: 2015/07/22 15:10 [2015/07/22 15:10] Target Answer Time: 24.00
 Primary Answer Deadline: 2015/07/23 15:10
 Substatus: In Progress
 Owner: Manager
 Customer Representative: [Search]
 Customer Company: [Search]

Type Information

Urgency: middle
 Influence: middle
 Priority: 4
 Incident Category: Fault

The incident information can be entered once the incident number is assigned.

The [Easy Number] item is checked for incidents registered with this method.

2. Enter the required items, edit the [Subject], and click the [Save] button.

The new incident was registered. The [Easy Number] item changes to an unchecked state.

If the [Cancel] button is clicked to cancel the editing or the incident is saved without editing the [Subject], the [Easy Number] item will remain checked.

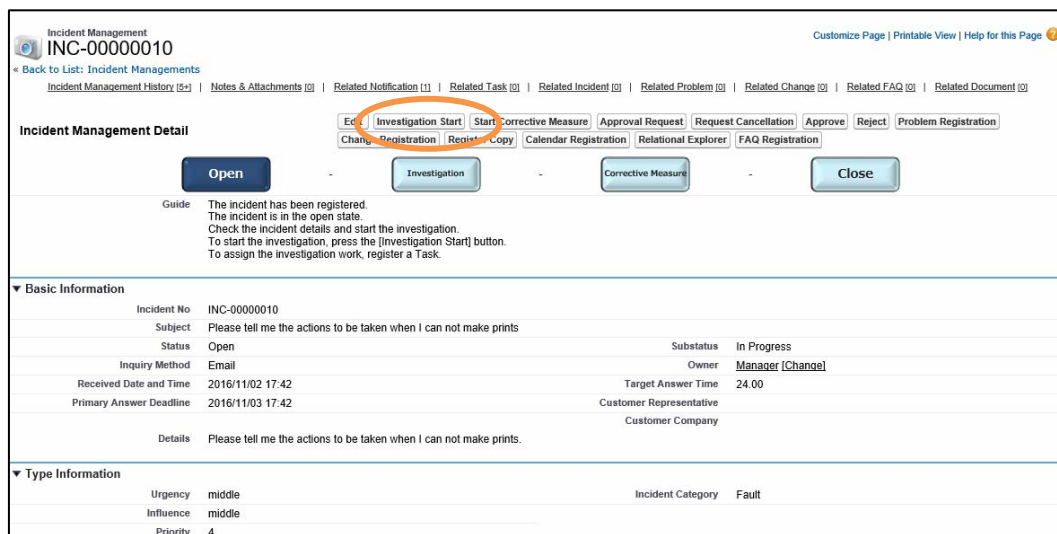
4.2.2 Investigation Start

The following operations are performed by the user (incident Owner) who was assigned the incident.

1. **Confirm the notification in the portal.**
2. **Open the Incident Management detail screen.**

Refer to the previous section "2.8 Creating, Editing and Deleting Records" for details on how to open the screen.

Click the [Investigation Start] button.



The screenshot shows the 'Incident Management Detail' screen for incident INC-00000010. The 'Investigation Start' button is highlighted with a red circle. Below the buttons is a guide section and a table of incident details.

Incident Management Detail

Buttons: Open, Investigation, Corrective Measure, Close

Guide
 The incident has been registered.
 The incident is in the open state.
 Check the incident details and start the investigation.
 To start the investigation, press the [Investigation Start] button.
 To assign the investigation work, register a Task.

▼ Basic Information	
Incident No	INC-00000010
Subject	Please tell me the actions to be taken when I can not make prints
Status	Open
Inquiry Method	Email
Received Date and Time	2016/11/02 17:42
Primary Answer Deadline	2016/11/03 17:42
Substatus	In Progress
Owner	Manager [Change]
Target Answer Time	24.00
Customer Representative	
Customer Company	
Details	Please tell me the actions to be taken when I can not make prints.

▼ Type Information	
Urgency	middle
Influence	middle
Priority	4
Incident Category	Fault

Click the [OK] button when the confirmation message is displayed.

The investigation has now been started.

4.3 Investigation in Progress



Investigation refers to the investigation details and results, entering the corrective measure details and up to the stage where the corrective measure starts.

1. Open the Incident Management detail screen.

Refer to the previous section "2.8 Creating, Editing and Deleting Records" for details on how to open the screen.

2. Enter the details of the investigation in [Investigation Details] (Add the results once the investigation has been carried out).

3. Enter the corrective measure for the incident in [Corrective Measure Details].

4. Click the [Start Corrective Measure] button.

Incident Management
INC-00000010

Customize Page | Printable View | Help for this Page

Back to List: Incident Managements

Incident Management History | Notes & Attachments | Related Notification | Related Task | Related Incident | Related Problem | Related Change | Related FAQ | Related Document

Incident Management Detail

Buttons: Edit, Investigation Start, **Start Corrective Measure**, Approval Request, Request Cancellation, Approve, Reject, Problem Registration, Change Registration, Register, Calendar Registration, Relational Explorer, FAQ Registration

Buttons: Open, Investigation, Corrective Measure, Close

Guide: The incident investigation has been started. Enter the "Investigation Details". Enter the corrective measure details based on the investigation results for this incident in "Corrective Measure Details". Once you have finished the investigation, next start the corrective measure. To start the corrective measure, press the [Start Corrective Measure] button.

Basic Information			
Incident No	INC-00000010		
Subject	Please tell me the actions to be taken when I can not make prints		
Status	Investigation	Substatus	In Progress
Inquiry Method	Email	Owner	Manager (Change)
Received Date and Time	2016/11/02 17:42	Target Answer Time	24.00
Primary Answer Deadline	2016/11/03 17:42	Customer Representative	
Details	Please tell me the actions to be taken when I can not make prints.		

Type Information			
Urgency	middle	Incident Category	Fault
Influence	middle		
Priority	4		

Click the [OK] button when the "Started the incident corrective measure" message is displayed.

This completes the investigation.

If investigation or corrective measures are required for the investigation result or root cause, refer to "4.4 Function Escalation" to perform escalation.

4.4 Function Escalation



Function Escalation is when a new ticket is separately issued for management information based on the incident information. Tickets for problem information, change information and FAQ Management information can be issued.

Problem information is issued when a permanent solution cannot be found even after carrying out an incident investigation and corrective measures.

Change Management receives the incident details and issues a ticket if changes are planned for the configuration information of the service being provided.

FAQ Management issues a ticket when registering FAQ information from the incident and corrective measure details.

4.4.1 Function Escalation (Problem)

This section explains the procedure to issue problem information from an incident.

1. Open the Incident Management detail screen.

Refer to the previous section "2.8 Creating, Editing and Deleting Records" for details on how to open the screen.

2. Click the [Problem Registration] button.

The problem is created (The created problem can be confirmed in the lower part of the Incident Management detail screen under "Related Problem").

Notification is sent to the portal of the Problem Management staff.

◆ **Auto populated content**

Subject

Related Service

Related Hardware

Related Software

This completes the Function escalation to Problem Management.

4.4.2 Function Escalation (Change)

This section explains the procedure to issue change information from an incident.

The change issued with this procedure begins from the "Open" status.

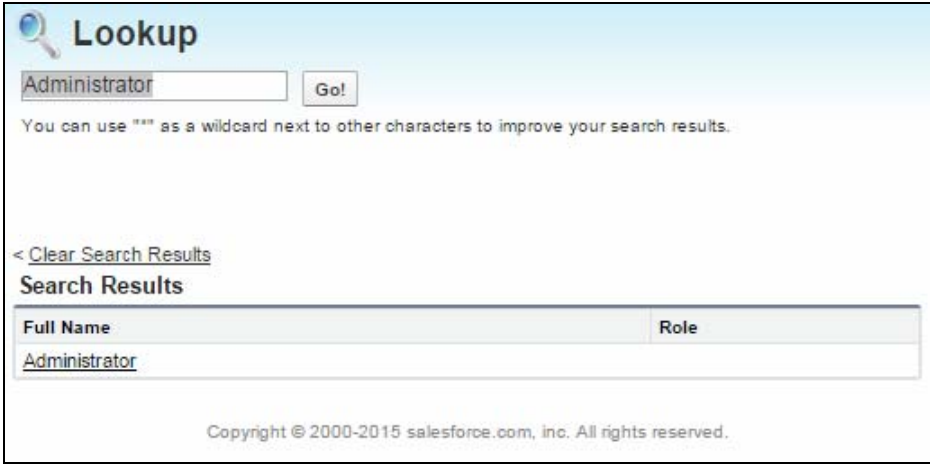
The change issued with the default operation begins from the "Change Request" status. For more details about the default operation, refer to section "6.2.2 Change Escalation Registration".

1. **Open the Incident Management detail screen.**

Refer to the previous section "2.8 Creating, Editing and Deleting Records" for details on how to open the screen.

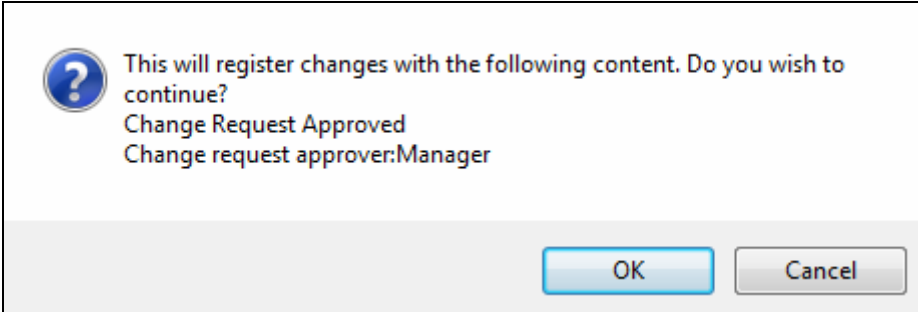
2. **Click the [Change Registration] button.**

3. **Select the change Approver.**



Full Name	Role
Administrator	

The following confirmation message is displayed when the change request Approver is selected.



?

This will register changes with the following content. Do you wish to continue?
Change Request Approved
Change request approver:Manager

OK Cancel

4. Click the [OK] button.

The change is created (The created change can be confirmed in the lower part of the Incident Management detail screen under [Related Change]).

Notification is sent to the portal of the Change Management staff.

◆ Auto populated content

Subject

Related Service

Related Hardware

Related Software

This completes the Function escalation to Change Management.

4.4.3 Function Escalation (FAQ Management)

This section explains the procedure to issue FAQ Management information from an incident.

1. Open the Incident Management detail screen.

Refer to the previous section "2.8 Creating, Editing and Deleting Records" for details on how to open the screen.

2. Click the [FAQ Registration] button.

The FAQ Management is created (The created FAQ Management can be confirmed in the lower part of the Incident Management detail screen under "Related FAQ").

Notification is sent to the portal of the FAQ Management staff.

◆ Auto populated content

Subject

Details

Corrective Measure Details

This completes the Function escalation to FAQ Management.

4.5 Corrective Measure in Progress



Implement the corrective measure for the incident and register the results.

The procedure is explained as follows.

1. Open the Incident Management detail screen.

Refer to the previous section "2.8 Creating, Editing and Deleting Records" for details on how to open the screen.

2. Follow the Corrective Measure Details to implement the measure.

3. Enter the post-implementation result in [Corrective Measure Result].

4. Confirm that the customer understands the corrective measure details and check the [Confirm Customer] box.

5. Enter either Permanent Response or Interim Measure in [Close Type].

When escalating to Problem Management, enter [Interim Measure] to escalate the incident to Problem Management. For more details, refer to section "4.4 Function Escalation".

6. Click the [Approval Request] button to request closing approval.

Notification is sent to the portal of the Approver.

Notification is sent to the portal when the Approver grants approval of the request. If the Approver rejects the closing, then it returns to the reinvestigation and corrective measures.

4.6 Approval in Progress, Closing



Approve the incident investigation and corrective measure details and results.

The following operations are performed by the Incident Management Manager. The incident response closes with the approval.

Confirm the approval request from the portal and open the Incident Management detail screen.

Confirm the details and results of the incident investigation and corrective measure.

◆ To approve

1. Click the [Approve] button.

The comment field is displayed.

2. Enter the comment.

The approval notification is sent to the incident Owner's portal.

3. The incident Owner confirms the details to close the notification.

◆ To reject

1. Click the [Reject] button.

The comment field is displayed.

2. Enter the comment.

3. The rejection notification is sent to the incident Owner's portal.

The incident Owner confirms the details and performs the reinvestigation and corrective measures.

* Notification can be sent by Email as well as to the portal. For more details, refer to section "Appendix.1 Notification Function".

* The Approver can be changed. For more details, refer to section "Appendix.5 Change Approver".

* The approval or rejection comment can be set to automatic entry.

For more details, refer to the "LMIS on cloud コンフィグレーションガイド".

4.7 Process Improvement

This section explains the functions and usage procedure to improve processes to suit your business.

4.7.1 Service Level Management

The Primary Answer Deadline and the Target Answer Time can be automatically set when registering the basic information for an incident. Services and Service Contracts can also be associated with an incident (For details about Services and Service Contracts, refer to "8.1 Types of Configuration Information"). The incident response time listed in the Service is set when associating a Service. The incident response time listed in the Service Contract is set when associating both. In an emergency, the response time can be set manually.

The procedure to switch the method for setting the Primary Answer Deadline and the Target Answer Time is as follows.

1. **Open the Incident Management detail screen or the Create New screen.**
2. **Select one of the following in [Apply SLO] under [Control Information].**

ON: Prioritize the response time registered in the SLO information of the Service or Service Contract (manual setting).

CREATEONLY: Prioritize the response time (automatic) registered in the SLO information of the Service or Service Contract only when creating a new record.

OFF: Directly set the response time (manual setting).

4.7.2 Change Owner

The Owner of the incident can be changed.

Change the Owner to assign the incident to a staff who is well suited to handle the incident details.

1. **Open the Incident Management detail screen of the incident to change the Owner.**
2. **Under [Basic Information], click [Change] for [Owner].**

The [Ownership Edit] screen is displayed.

3. Select the Owner.

Click the [Owner Lookup] button (circled area in the graphic above) to search for the staff.

4. Click the [Save] button.

Notification is sent to the new Owner.

This completes the Change Owner procedure for the incident.

4.7.3 Change Approval Flow

The incident approval flow may be selected in the event of an emergency or if the default approval flow is unsuitable.

(The approval flow must be created in advance. The method for creating the approval flow is explained in "LMIS on cloud コンフィグレーションガイド".)

1. **Open the Incident detail screen or the Create New screen.**
2. **Select the approval flow from the dropdown list under [Control Information] and [Approver Decision Method].**

N: The record creator is the "Owner". The Approver is the manager of the "Owner".

Q: The "Owner" or "Approver" can specify the Owner after the record is created.

3. **Click the [Save] button.**

This completes the Change Approval Flow procedure.

Caution

- If the value of "Approver Decision Method" is 'N' and the manager of the "Owner" is not set, then the "Owner" is set as the "Approver".

4.7.4 Work Request

Work relating to the investigation and response to an incident can be assigned to another user. This related work is called a task (for more details, refer to "Appendix.2 Task(LMIS) Function").

1. **Open the Incident detail screen or the Create New screen to register a task for an incident.**
2. **Click the [New Task (LMIS)] button under [Related Task].**
The task edit screen is displayed. Enter the required items and save.
3. **Set one of the following from the [Awaiting Task Completion] dropdown list in the [Control Information] section of the Incident edit screen.**
ON: Do not make an Approval Request until all of the tasks are closed.
OFF: Make an Approval Request even if the tasks are not closed.
4. **Click the [Save] button.**

This completes the Work Request procedure.

4.7.5 FAQ Candidate Registration

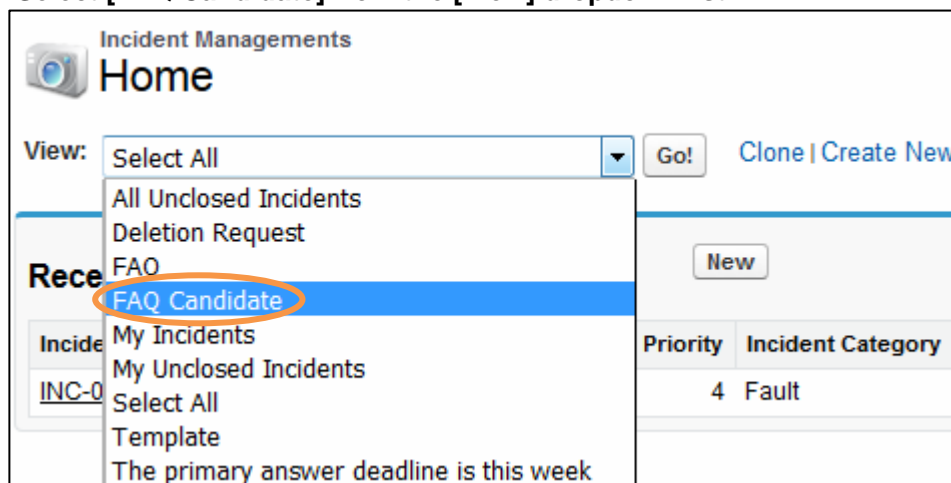
Mark frequently occurring, similar incidents to register them as an FAQ Candidate. This enables the improvement of provided services by clarifying frequently occurring Q&A topics and maintaining consistent response quality for the same incident.

◆ Method for Registering an FAQ Candidate

1. Open the Incident detail screen or the Create New screen to register an incident as an FAQ topic.
2. Check the [FAQ Candidate] box under [Control Information].
3. Click the [Save] button.

◆ Confirmation Method

1. Open the [Incident Managements] tab.
2. Select [FAQ Candidate] from the [View] dropdown list.



The FAQ Candidate is displayed.

Caution

- A new ticket for FAQ Management information based on the incident information can be issued with Function Escalation. Refer to "4.4.3 Function Escalation (FAQ Management)" for the operational procedure.

4.7.6 Using a Template

A new incident ticket can be issued by copying the contents of an existing incident. The existing incident is called a "template".

Registering the contents of an existing incident as a template reduces the time needed to receive and investigate frequently occurring incidents.

◆ Copied Contents

FAQ Candidate

Details

Urgency

Impact

Incident Category

Inquiry Method

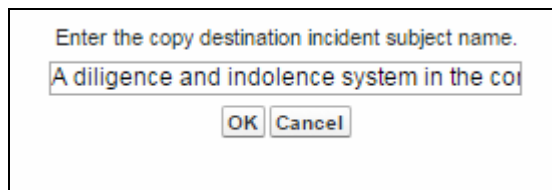
◆ Procedure to Create a Template

1. Open the Incident detail screen or the Create New screen to register a Template.
2. Check the [Input Template] box under [Control Information].
3. Click the [Save] button.

◆ Procedure to Use a Template

1. Open the Incident detail screen to register a Template.
2. Click the [Register Copy] button.
3. Enter the incident subject when the dialog is displayed (graphic below).

The Template subject is automatically input into the entry field.



Enter the copy destination incident subject name.

A diligence and indolence system in the co

OK Cancel

Enter the subject and click the [OK] button.

4. The detail screen for the new incident is displayed.
Enter the required items, and click the [Save] button.

4.7.7 Calendar Registration

Response Deadlines and other tasks can be registered in the calendar. This can be used as a reminder for Response Deadlines or to easily manage schedules to include incident response deadlines.

Refer to "Appendix.9 Calendar Registration" for the Calendar Registration procedure and how to display the calendar.

4.7.8 Self Service Portal Responses

This section describes the incident response functionality available in the Self Service Portal for users that must respond to incidents.

Use the following procedure to respond to the incident creators.

◆ Entering Response Status

Once the status of an incident has been changed in LMIS on cloud or a field such as the contents for customer or content has been edited, the incident in the Self Service Portal is also updated. This allows the incident creator to confirm the response status in real-time.

● LMIS on cloud Incident Screen

Incident Management
INC-00000010

Back to List: Incident Managements

Incident Management History | Notes & Attachments | Related Notification | Related Task | Related Incident | Related Problem | Related Change | Related FAQ | Related Document

Incident Management Detail

Open Investigation Corrective Measure Close

Guide The incident investigation has been started. Enter the "Investigation Details". Enter the corrective measure details based on the investigation results for this incident in "Corrective Measure Details". Once you have finished the investigation, next start the corrective measure. To start the corrective measure, press the [Start Corrective Measure] button.

Basic Information

Incident No	INC-00000010	Substatus	In Progress
Subject	Please tell me the actions to be taken when I can not make prints	Owner	Manager [Change]
Status	Investigation	Target Answer Time	24.00
Inquiry Method	Email	Customer Representative	
Received Date and Time	2016/11/02 17:42	Customer Company	
Primary Answer Deadline	2016/11/03 17:42		

Details Please tell me the actions to be taken when I can not make prints.

● Self Service Portal Incident Screen

INC-00000012:Standard

Withdraw Close Copy Regist Bookmark Close Window

Classification Standard

Incident No INC-00000012

Subject XX does not work

Status Investigation

Accept email address [Redacted]

Urgency middle

Influence middle

Details XX does not work

Contents for Customer Please confirm it has been supported.

Received Date and Time 11/7/2016 4:37 PM

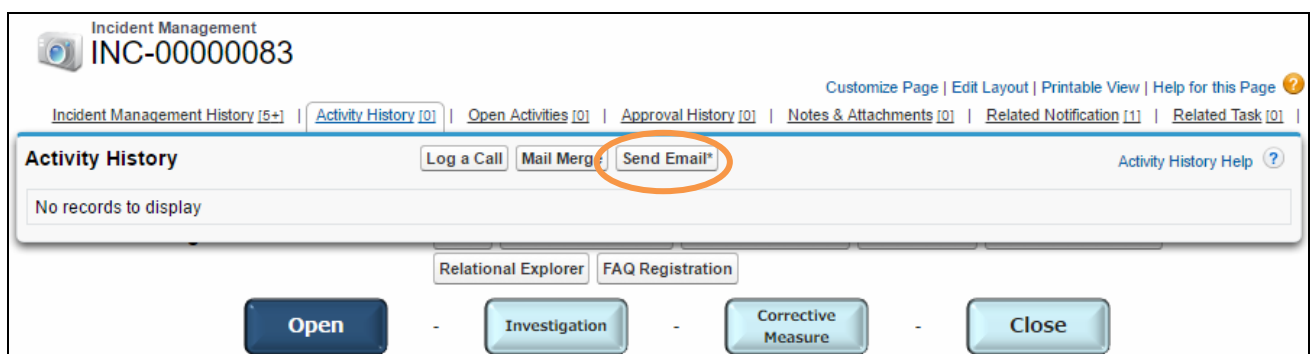
Ownername システム 管理者

◆ Email Responses

Responses to incidents can be sent using the email send function available in the Activity History. The creator of the incident can confirm the sent activity history using the Self Service Portal.

Refer to "Appendix.10 Send an Email Using the Activity History" for more information on sending email from Activity History.

1. **Open the activity history of the record for which you want to send email and click the [Send Email*] button in Activity History.**



The screenshot displays the Incident Management interface for incident INC-00000083. At the top, there are navigation links: Incident Management History [5+], Activity History [0], Open Activities [0], Approval History [0], Notes & Attachments [0], Related Notification [1], and Related Task [0]. Below these is the 'Activity History' section, which includes buttons for 'Log a Call', 'Mail Merge', and 'Send Email*'. The 'Send Email*' button is circled in orange. Below the buttons, there is a message 'No records to display'. At the bottom of the interface, there are buttons for 'Open', 'Investigation', 'Corrective Measure', and 'Close'.

- Specify the email address of the incident creator as the recipient on the send email that appears. Enter all other required information and click the [Send] button.

Edit Email ! = Required Information

Email Format: Text-Only [[Switch to HTML](#)]

From: "Organization address" <test1@1kazz8uihoortz2gkof6bi8d4xq0eah53graswadju1zgy3zll.1-b8w8eaa.ap0.apex.salesforce.com>

To: to@sample.sample

Related To: Incident Management | INC-00000001

Additional To: to2@sample.sample

CC: cc@sample.sample

BCC:

Subject: LMIS mail notification [INC-00000146: password reissue request]

Body: You will be sent the re-issued password.
Password: XXX:XXX-XXX
Or more, thank you.

Attachments: Attach File | no attachments

- The sent email message is added to the record's activity history so that the incident creator can confirm the content in the record by accessing the Self Service Portal.

Incident Management
INC-00000001

Customize Page | Edit Layout | Printable View | Help for this Page

« Back to List: Users

Incident Management History [5+] | **Activity History [1]** | Notes & Attachments [0] | Related Notification [1] | Related Task [0] | Related Incident [0] | Related Problem [0]

Activity History Activity History Help ?

Log a Call | Mail Merge | Send an Email | View All

Action	Subject	Name	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Email: LMIS mail notification [INC-00000146: password reissue request]	SSP User	✓	2016/11/02	Administrator	2016/11/02 11:02

Open - Investigation - Corrective Measure - Close

Guide
The incident has been registered.
The incident is in the open state.
Check the incident details and start the investigation.
To start the investigation, press the [Investigation Start] button.
To assign the investigation work, register a Task.

◆ **Managing Attachment File Publication**

Incident creators can share attachment files related to incidents with other Self Service Portal users.

The publishing of attachment files can be enabled or disabled.

Refer to "Appendix.11 Managing Attachment Files" for more information on managing attachment files.

5. Problem Management

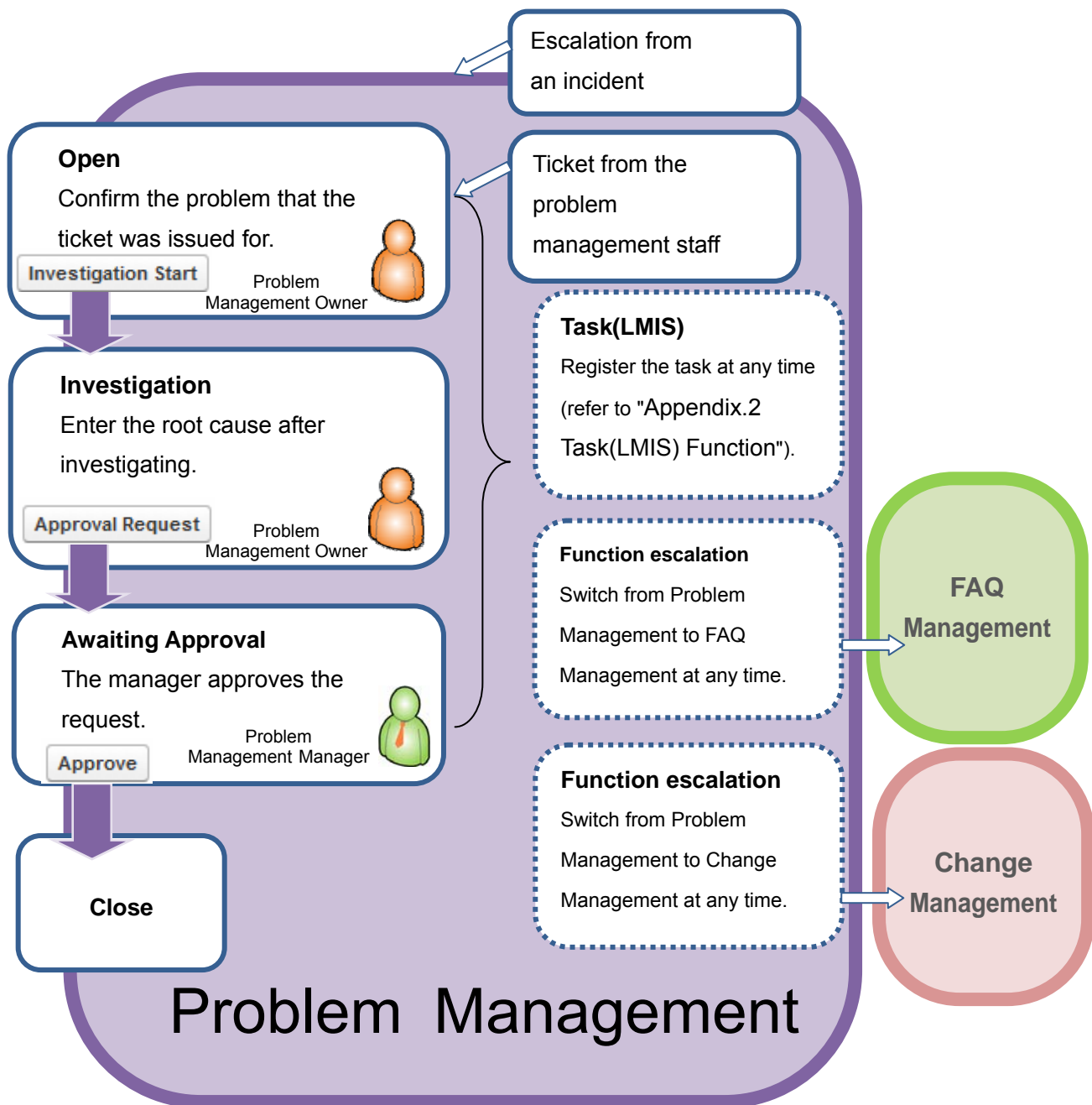
Problem Management manages the work until the problem is resolved.

The following workflow diagram provides a graphical illustration to explain the accompanying management procedure.

5.1 Workflow Explanation Diagram

This section explains the entire workflow and each process in Problem Management.

The workflow described here is the default workflow provided by this product.



5.2 Reception and Opening

This section explains the procedure from problem reception to the start of the investigation. Reception refers to the issuing of a problem ticket. Record the investigation details and results for the cause in the problem.

5.2.1 Problem Registration

This section explains the registration of new problem information.

- 1. Open the Register New screen.**

Refer to the previous section "2.8 Creating, Editing and Deleting Records" for details on how to open the screen.

- 2. Enter the required items.**

- 3. Click the [Save] button.**

The entered content is updated in the Problem Management detail screen.

A notification is displayed in the problem Owner's portal explaining that a problem was registered.

This completes the Problem Registration procedure.

5.2.2 Investigation Start

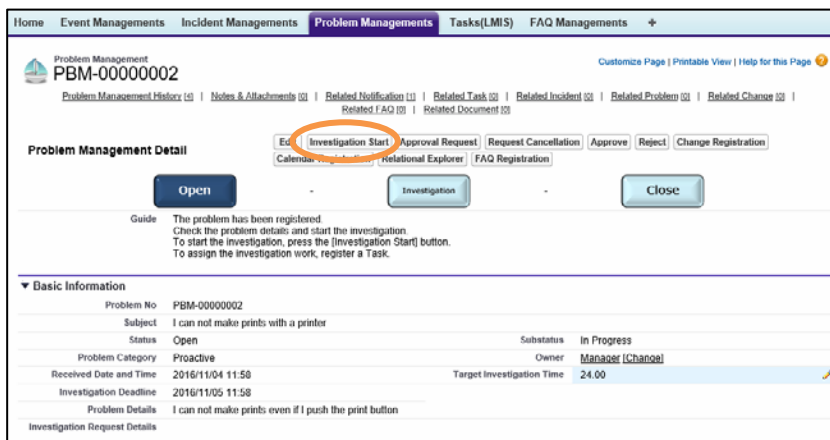
The following operations are performed by the user (Problem Management Owner) who was assigned the problem.

- 1. Confirm the notification in the portal.**

- 2. Open the Problem Management detail screen.**

Refer to the previous section "2.8 Creating, Editing and Deleting Records" for details on how to open the screen.

- 3. Click the [Investigation Start] button.**



The screenshot displays the 'Problem Management Detail' screen for problem PBM-00000002. The 'Investigation Start' button is circled in red. Below the buttons, a guide states: 'The problem has been registered. Check the problem details and start the investigation. To start the investigation, press the [Investigation Start] button. To assign the investigation work, register a Task.' The 'Basic Information' section includes the following details:

Problem No	PBM-00000002		
Subject	I can not make prints with a printer		
Status	Open	Substatus	In Progress
Problem Category	Proactive	Owner	Manager (Change)
Received Date and Time	2016/11/04 11:58	Target Investigation Time	24.00
Investigation Deadline	2016/11/05 11:58		
Problem Details	I can not make prints even if I push the print button		
Investigation Request Details			

Click the [OK] button when the confirmation message is displayed.

This starts the investigation.

5.3 Investigation in Progress

Investigation refers to the investigation details and results, entering the corrective measure details and up to the stage where the corrective measure starts.

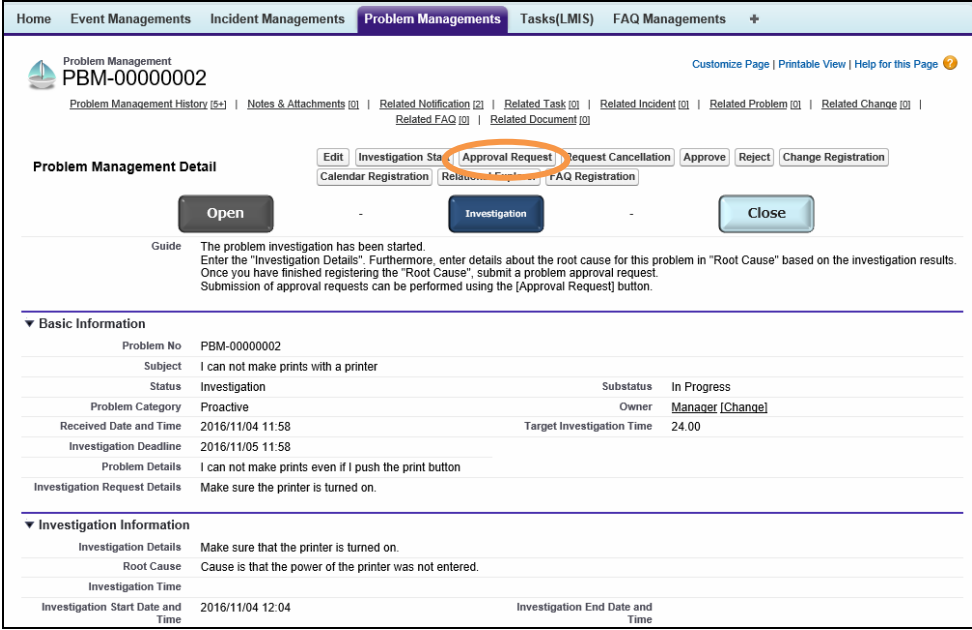
1. Open the Problem Management detail screen.

Refer to the previous section "2.8 Creating, Editing and Deleting Records" for details on how to open the screen.

2. Enter the details of the investigation in [Investigation Details].

3. Enter the root cause of the problem in [Root Cause].

4. Click the [Approval Request] button.



The screenshot shows the 'Problem Management Detail' screen for record PBM-00000002. The 'Approval Request' button in the toolbar is highlighted with an orange circle. Below the toolbar, a guide explains the next steps: 'The problem investigation has been started. Enter the "Investigation Details". Furthermore, enter details about the root cause for this problem in "Root Cause" based on the investigation results. Once you have finished registering the "Root Cause", submit a problem approval request. Submission of approval requests can be performed using the [Approval Request] button.'

▼ Basic Information	
Problem No	PBM-00000002
Subject	I can not make prints with a printer
Status	Investigation
Substatus	In Progress
Problem Category	Proactive
Owner	Manager [Change]
Received Date and Time	2016/11/04 11:58
Target Investigation Time	24.00
Investigation Deadline	2016/11/05 11:58
Problem Details	I can not make prints even if I push the print button
Investigation Request Details	Make sure the printer is turned on.

▼ Investigation Information	
Investigation Details	Make sure that the printer is turned on.
Root Cause	Cause is that the power of the printer was not entered.
Investigation Time	
Investigation Start Date and Time	2016/11/04 12:04
Investigation End Date and Time	

Click the [OK] button when the message is displayed.

This completes the investigation.

5.4 Function Escalation

5.4.1 Function Escalation (Change)

This section explains the procedure to issue a ticket for change information from problem information as needed.

The change issued with this procedure begins from the "Open" status.

The change issued with the default operation begins from the "Change Request" status. For more details about the default operation, refer to section "6.2.2 Change Escalation Registration".

1. Open the Problem Management detail screen.

Refer to the previous section "2.8 Creating, Editing and Deleting Records" for details on how to open the screen.

2. Click the [Change Registration] button.

3. Select the change Approver.



Lookup

staff

You can use "*" as a wildcard next to other characters to improve your search results.

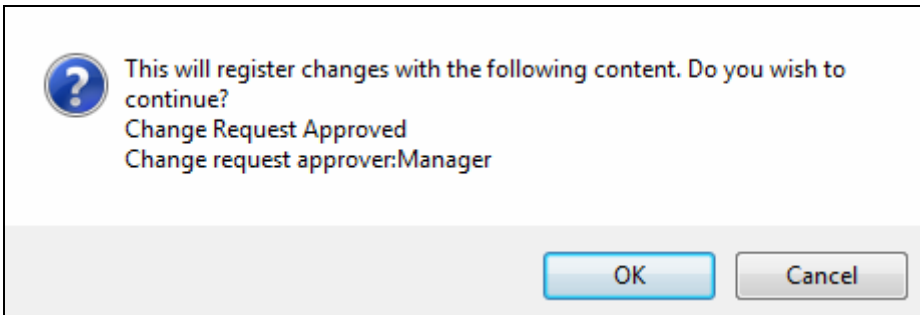
< [Clear Search Results](#)

Search Results

Full Name	Role
Staff	

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The following confirmation message is displayed when the change request Approver is selected.



?

This will register changes with the following content. Do you wish to continue?

Change Request Approved
Change request approver:Manager

4. Click the [OK] button.

The change is created (The created change can be confirmed in the lower part of the Problem Management detail screen under [Related Change]).

Notification is sent to the portal of the Change Management staff.

◆ **Auto populated content**

Subject

Related Service

Related Hardware

Related Software

This completes the Function escalation to Change Management.

5.4.2 Function Escalation (FAQ Management)

This section explains the procedure to issue a ticket for FAQ Management information from problem information as necessary.

1. Open the Problem Information detail screen.

Refer to the previous section "2.8 Creating, Editing and Deleting Records" for details on how to open the screen.

2. Click the [FAQ Registration] button.

The FAQ Management is created (The created FAQ Management can be confirmed in the lower part of the Problem Information detail screen under "Related FAQ").

Notification is sent to the portal of the FAQ Management staff.

◆ **Auto populated content**

Subject

Problem Details

Root Cause

This completes the Function escalation to FAQ Management.

5.5 Approval in Progress, Closing



Approve the problem investigation and corrective measure details and results.

The following operations are performed by the Problem Management Manager. The problem response closes with the approval.

Confirm the approval request from the portal and open the Problem Management detail screen.

Confirm the details and results of the problem investigation.

◆ To approve

1. Click the [Approve] button.

The comment field is displayed.

2. Enter the comment.

The approval notification is sent to the problem Owner's portal.

3. The problem Owner confirms the details to close the notification.

◆ To reject

1. Click the [Reject] button.

The comment field is displayed.

2. Enter the comment.

3. The rejection notification is sent to the problem Owner's portal.

The rejection Owner confirms the details and performs the reinvestigation.

* Notification can be sent by Email as well as to the portal. For more details, refer to section "Appendix.1 Notification Function".

* The Approver can be changed. For more details, refer to section "Appendix.5 Change Approver".

* The approval or rejection comment can be set to automatic entry.

For more details, refer to the "LMIS on cloud コンフィグレーションガイド".

5.6 Process Improvement

This section explains the functions and usage procedure to improve processes to suit your business.

5.6.1 Service Level Management

The Investigation Deadline and the Target Investigation Time can be automatically set based on the service level agreement with each company when registering the basic information for a problem. In an emergency, they can also be set manually. The procedure to switch the method for setting the Investigation Deadline and the Target Investigation Time is as follows.

1. **Open the Problem Management detail screen or the Create New screen.**
2. **Select one of the following in [Apply SLO] under [Control Information].**

ON: Prioritize the response time registered in the Service SLO information (manual setting).

CREATEONLY: Prioritize the response time (automatic setting) registered in the Service SLO information only when creating a new record.

OFF: directly set the response time (manual setting).

5.6.2 Change Owner

The problem Owner can be changed.

Change the Owner to assign the problem to a staff who is well suited to handle the problem details.

1. **Open the detail screen of the problem to change the Owner.**
2. **Under [Basic Information], click [Change] for [Owner].**

The [Ownership Edit] screen is displayed.

The screenshot shows the 'Ownership Edit' screen for problem PBM-00000001. The title bar reads 'Ownership Edit PBM-00000001'. Below the title, a message states: 'This screen allows you to transfer a problem management from one user to another.' The main content area is titled 'Select New Owner' and contains the following elements:

- A label 'Transfer this problem management Owner' followed by the problem ID 'PBM-00000001' and a search input field with a magnifying glass icon.
- A checkbox labeled 'Send Notification Email'.
- 'Save' and 'Cancel' buttons at the bottom right.

3. Select the Owner.

Click the [Owner Lookup] button (circled area in the graphic above) to search for the staff.

4. Click the [Save] button.

Notification is sent to the new Owner.

This completes the Change Owner procedure for the problem.

5.6.3 Change Approval Flow

The approval flow can be changed to one that is suitable for your department or the corresponding problem.

(The approval flow must be created in advance.)

1. **Open the Problem Management detail screen or the Create New screen.**
2. **Select the approval flow from the Approver Decision Method dropdown list under [Control Information].**

N: The record creator is the "Owner". The Approver is the manager of the "Owner".

Q: The "Owner" or "Approver" can specify the Owner after the record is created.

3. **Click the [Save] button.**

This completes the Change Approval Flow procedure.

Caution

- If the value of "Approver Decision Method" is 'N' and the manager of the "Owner" is not set, then the "Owner" is set as the "Approver".

5.6.4 Work Request

Work relating to the investigation of a problem can be assigned to another user. This related work is called a task (for more details, refer to "Appendix.2 Task(LMIS) Function").

1. **Open the Problem detail screen or the Create New screen to register a task for a problem.**
2. **Click the [New Task (LMIS)] button under [Related Task].**
The task edit screen is displayed. Enter the required items and save.
3. **Set one of the following from the [Awaiting Task Completion] dropdown list in the [Control Information] section of the Problem edit screen.**
ON: Do not make an Approval Request until all of the tasks are closed.
OFF: Make an Approval Request even if the tasks are not closed.
4. **Click the [Save] button.**

This completes the Work Request procedure.

5.6.5 Calendar Registration

Response Deadlines and other tasks can be registered and shared in the calendar. This can be used as a reminder for Response Deadlines or to easily manage schedules to include problem response deadlines.

Refer to "Appendix.9 Calendar Registration" for the Calendar Registration procedure and how to display the calendar.

6. Change Management

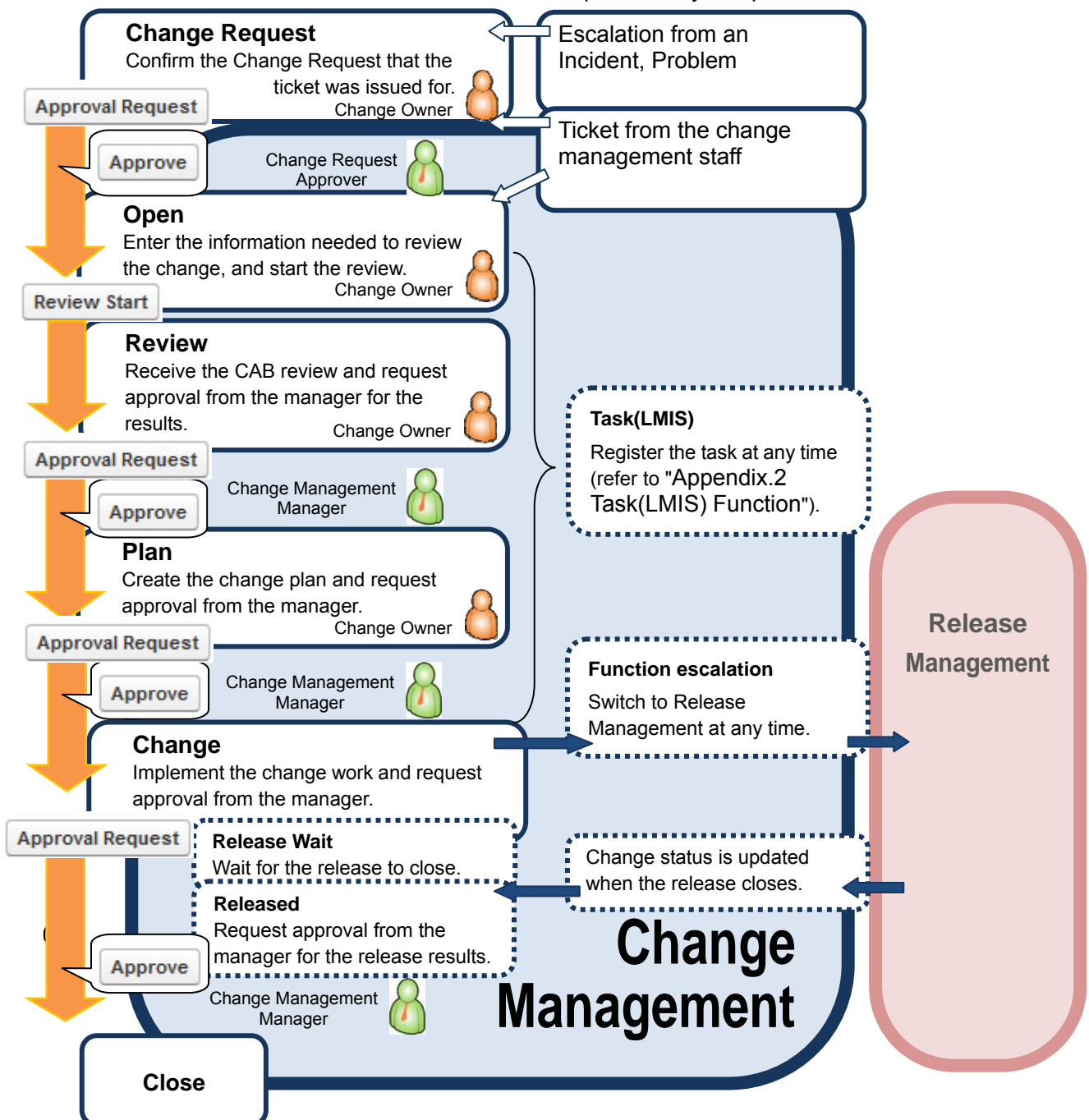
Change Management manages the changes to services and products.

The following workflow diagram provides a graphical illustration to explain the accompanying management procedure.

6.1 Workflow Explanation Diagram

This section explains the workflow and each process in Change Management.

The workflow described here is the default workflow provided by this product.



6.2 Change Reception

The procedure for change reception is explained as follows. Reception refers to the issuing of a change ticket.

Register the details and plan for implementing the change and the configuration information being changed.

Perform the Change Request confirmation and the review to diagnose whether to implement the change depending on the Change Details. Formulate and implement the Change Plan once the implementation has been decided.

6.2.1 Change Reception

This section explains how to directly issue and register a change.

The following two workflows can be selected during registration.

- Implement the Change Request approval process
- Do not implement the Change Request approval process

◆ To implement the Change Request approval process

1. Open the Create New screen.

Refer to the previous section "2.8 Creating, Editing and Deleting Records" for details on how to open the screen.

2. Enter the required items.

3. Specify the Change Request Approver.

Select the Approver with the [Change Request Approver Lookup] button.

4. Click the [Save] button.

The change is registered with the [Change Request] status.

For more details about the implementation, refer to section "6.3 Change Request".

This completes the Change Registration procedure.

◆ To not implement the Change Request approval process

1. Open the Create New screen.

Refer to the previous section "2.8 Creating, Editing and Deleting Records" for details on how to open the screen.

2. Enter the required items.

3. Click the [Save] button.

The change is registered with the [Open] status.

For more details about the implementation, refer to section "6.4 Change Review".

This completes the Change Registration procedure.

6.2.2 Change Escalation Registration

This section explains the change escalation from Incident Management and Problem Management.

In the default operation, the Change Request Approval process must be performed for changes escalated from Incident Management and Problem Management.

6.3 Change Request



Before the change review is received in the Change Request, decision-making is performed in a department, team or other comparatively small organization to assess the change details and whether they are really needed.

The Change Request procedure is performed as follows.

1. **Open the Change Management detail screen.**
2. **Enter the [Change Request Information].**
3. **Click the [Save] button.**

The entered content is updated in the Change Management detail screen.

4. **Click the [Approval Request] button.**

Request approval of the [Change Request Information] details.

Click the [OK] button when the confirmation message is displayed.

The Change Request is approved by the user who was set as the [Change Request Approver] during registration.

Perform the change review after receiving approval.

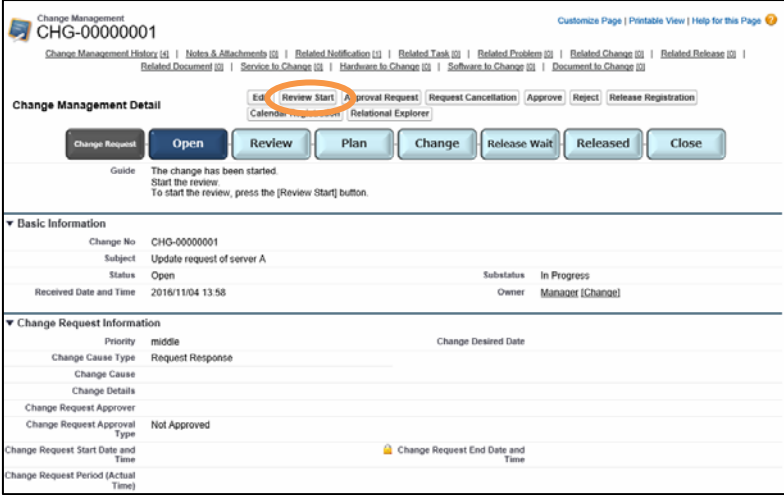
If it is rejected when the [Change Request Information]-[Change Request Approval Type] is set to [Reject], then the change closes immediately.

6.4 Change Review

In the change review, the review organization (CAB) diagnoses the change details to decide whether to implement the change.

The change review procedure is performed as follows.

1. Click the [Review Start] button.



The screenshot shows the 'Change Management Detail' screen for change request CHG-00000001. The 'Review Start' button is highlighted with an orange circle. Below the buttons, a guide message states: 'The change has been started. Start the review. To start the review, press the [Review Start] button.' The 'Basic Information' section shows the change is 'Open' with a status of 'In Progress' and a received date of 2016/11/04 13:58. The 'Change Request Information' section shows a priority of 'middle' and a change request approval type of 'Not Approved'.

Click the [OK] button when the "The review has been started." message is displayed.

The date that the change review started is displayed in [Review Information].

The change review has been started.

2. Open the Change Management detail screen.

3. Perform the review of the change details through the CAB as necessary. Select the review result from the [Review Information]-[Review Results Type] dropdown list after the review.

4. Click the [Save] button.

The entered content is updated in the Change Management detail screen.

5. Click the [Approval Request] button.

Request approval of the [Review Information] details.

Click the [OK] button when the confirmation message is displayed.

The Change Management manager approves the change review.

Implement the change plan after receiving approval.

If it is rejected when the [Review Information]-[Review Results Type] is set to [Reject], then the change closes immediately.

6.5 Change Plan

Create the plan to implement the change which was decided.

The procedure for the change plan is performed as follows.

1. **Display the Change Management detail screen.**
2. **Enter the [Change Scheduled Start Date and Time] and [Change Scheduled End Date and Time] in [Plan Information].**
3. **Click the [Save] button.**

The entered content is updated in the Change Management detail screen.

If other documents are required, the files can be attached from the Related List.

4. **Click the [Approval Request] button.**

Request approval of the [Plan Information] details.

Click the [OK] button when the confirmation message is displayed.

This completes the Change Plan procedure.

The Change Management manager approves the change plan.

Implement the change after receiving approval.

6.6 Change in Progress



This section implements the change.

The procedure for implementing the change plan is as follows.

1. Display the Change Management detail screen.

2. Enter the [Change Information]-[Change Details].

Set the [Awaiting Release Completion] to [OFF] to combine the release of multiple changes instead of immediately releasing the change.

3. Click the [Save] button.

The entered content is updated in the Change Management detail screen.

4. Click the [Approval Request] button.

Request approval of the [Change Information] details.

Click the [OK] button when the confirmation message is displayed.

The Change Management manager approves the change implementation.

If [Awaiting Release Completion] is set to [ON], release the change after receiving approval.

For other settings, the change closes immediately.

Caution

[Awaiting Release Completion] cannot be changed after the change is approved.

6.7 Change Release

This section releases the implemented change.

Escalate the change details to release, and wait until the release closes.

Check the release result after the release closes and decide to redo the change or close as is. (For release details, refer to section "7. Release Management".)

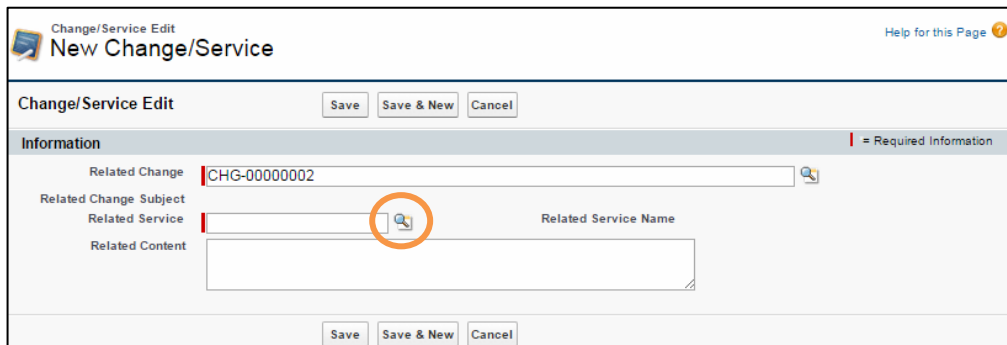
The procedure for releasing the change is as follows.

6.7.1 Registering the Configuration Information

If the Configuration Information to change is already identified, register the information to change in the Related List. Performing this work allows you to auto populate the information as the configuration information for release when escalating to the Release Management function.

In this example, a previously created service is associated.

1. **Open the Change Management detail screen.**
2. **Click the [New Change/Service] button under [Service to Change] in the Related List.**
The Change/Service edit screen is displayed.
3. **Select the service to change.**



The screenshot shows the 'Change/Service Edit' interface. At the top, there are buttons for 'Save', 'Save & New', and 'Cancel'. Below this is the 'Information' section, which includes a legend for required information (a red vertical bar). The 'Related Change' field is populated with 'CHG-00000002'. The 'Related Change Subject' field is empty. The 'Related Service' field is empty, and a magnifying glass icon (lookup button) is circled in orange. The 'Related Content' field is empty. At the bottom of the form, there are buttons for 'Save', 'Save & New', and 'Cancel'.

Click the [Related Service Lookup] button (circled area) to search for the service.

4. **Click the [Save] button.**

Click the [Save & New] button to select another service.

Click the [Cancel] button to stop saving associations.

This completes the Configuration Information associations.

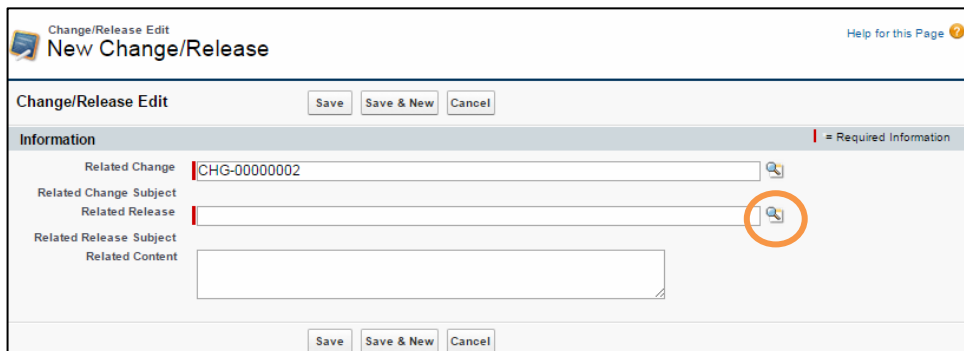
6.7.2 Release Registration

Perform a function escalation to Release Management and request the manager to apply the change.

◆ To make a manual association to an existing release

This section explains the procedure to manually create an association with a release registered in advance.

1. **Open the Change Management detail screen.**
2. **Click the [New Change/Release] button under [Related Release] in the Related List.**
The Change/Release edit screen is displayed.
3. **Select the release to make an association.**



The screenshot shows the 'Change/Release Edit' interface. At the top, there are buttons for 'Save', 'Save & New', and 'Cancel'. Below this is the 'Information' section, which includes fields for 'Related Change' (containing 'CHG-00000002'), 'Related Change Subject', 'Related Release' (with a circled magnifying glass icon), 'Related Release Subject', and 'Related Content'. A legend indicates that a red vertical bar next to a field name signifies 'Required Information'.

Click the [Related Release Lookup] button (circled area) to search for the release.

4. **Click the [Save] button.**
Click the [Save & New] button to associate another release.
Click the [Cancel] button to stop saving associations.

This completes the change and release associations.

◆ To automatically associate a release

Click the [Release Registration] button if a release to associate the change with is not registered.

The configuration information being changed is auto populated and the release is registered.

● Auto populated content

Subject

Service to Change

Hardware to Change

Software to Change

Document to Change

6.7.3 Confirming the Release Result

Confirm the release result after the release is closed.

The release result can be confirmed from the [Release Results Type] in the Related List.

After confirmation, use the following procedure to close or rerun the change.

1. Open the Change Management detail screen.

2. Enter the [Release Information].

Confirm the release result and enter the [Change Results Type] and [Change Results Information].

In case the release fails and the change needs to be executed again, set where to redo the change in [Re-execute Type].

3. Click the [Save] button.

The entered content is updated in the Change Management detail screen.

4. Click the [Approval Request] button.

Request approval of the [Release Information] details.

Click the [OK] button when the confirmation message is displayed.

The Change Management manager approves the release result.

If it is rejected when [Re-execute Type] is set, then the change is executed again from the location specified in [Re-execute Type].

6.8 Approval in Progress, Closing



Approve the change request, change plan, change implementation and the post-release result. During the change request registration, the approval is handled by the Approver specified in [Change Request Approver], and after that the operation is handled by the Change Management manager.

Confirm the approval request from the portal and open the Change Management detail screen.

◆ To approve

1. Click the [Approve] button.

The comment field is displayed.

2. Enter the comment.

The approval notification is sent to the change Owner's portal.

3. The change Owner confirms the details to complete the notification.

◆ To reject

1. Click the [Reject] button.

The comment field is displayed.

2. Enter the comment.

3. The rejection notification is sent to the change Owner's portal.

The change Owner confirms and modifies the contents and requests approval once again.

* The Approver can be changed. For more details, refer to section "Appendix.5 Change Approver".

* The approval or rejection comment can be set to automatic entry.

For more details, refer to the "LMIS on cloud コンフィグレーションガイド".

This section explains the special change operations when approving or rejecting each status.

Status	Description
Change request	If it is rejected when the [Change Request Information]-[Change Request Approval Type] is set to "Reject", then the change closes immediately.
Review	If it is rejected when the [Review Information]-[Review Results Type] is set to "Reject", then the change closes immediately.
Change	If it is "approved" when the [Control Information]-[Awaiting Release Completion] is set to [OFF], then the change closes immediately.
Release Wait	If it is "rejected" with the [Release Information]-[Re-execute Type] entered, then it is re-executed from the specified location.

6.9 Process Improvement

6.9.1 Change Owner

The change Owner can be changed.

Change the Owner to assign the change to a staff who is well suited to handle the change details.

1. **Open the detail screen of the change to modify the Owner.**
2. **Under [Basic Information], click [Change] for [Owner].**

The [Ownership Edit] screen is displayed.

Ownership Edit
CHG-00000002

This screen allows you to transfer a change management from one user to another.

Select New Owner

Transfer this change management Owner CHG-00000002

Send Notification Email

Save Cancel

3. **Select the Owner.**
Click the [Owner Lookup] button (circled area in the graphic above) to search for the staff.
4. **Click the [Save] button.**
Notification is sent to the new Owner.
This completes the Change Owner procedure for the staff.

6.9.2 Change Approval Flow

The approval flow can be changed to one that is suitable for your department or the corresponding change.

(The approval flow must be created in advance.)

1. **Open the Change detail screen or the Create New screen.**
2. **Select the approval flow from the dropdown list under [Control Information] and [Approver Decision Method].**

N: The record creator is the "Owner". The Approver is the manager of the "Owner".

Q: The "Owner" or "Approver" can specify the Owner after the record is created.

3. **Click the [Save] button.**

This completes the Change Approval Flow procedure.

Caution

- If the value of "Approver Decision Method" is 'N' and the manager of the "Owner" is not set, then the "Owner" is set as the "Approver".

6.9.3 Work Request

Work relating to the change can be assigned to another user. This related work is called a task (for more details, refer to "Appendix.2 Task(LMIS) Function").

1. **Open the Change detail screen or the Create New screen to register a task for a change.**
2. **Click the [New Task (LMIS)] button under [Related Task].**

The task edit screen is displayed. Enter the required items and save.

3. **Set one of the following from the [Awaiting Task Completion] dropdown list in the [Control Information] section of the Change edit screen.**

ON: Do not make an Approval Request until all of the tasks are closed.

OFF: Make an Approval Request even if the tasks are not closed.

4. **Click the [Save] button.**

This completes the Work Request procedure.

6.9.4 Calendar Registration

Response Deadlines and other tasks can be registered and shared in the calendar. This can be used as a reminder for Response Deadlines or to easily manage schedules to include change response deadlines.

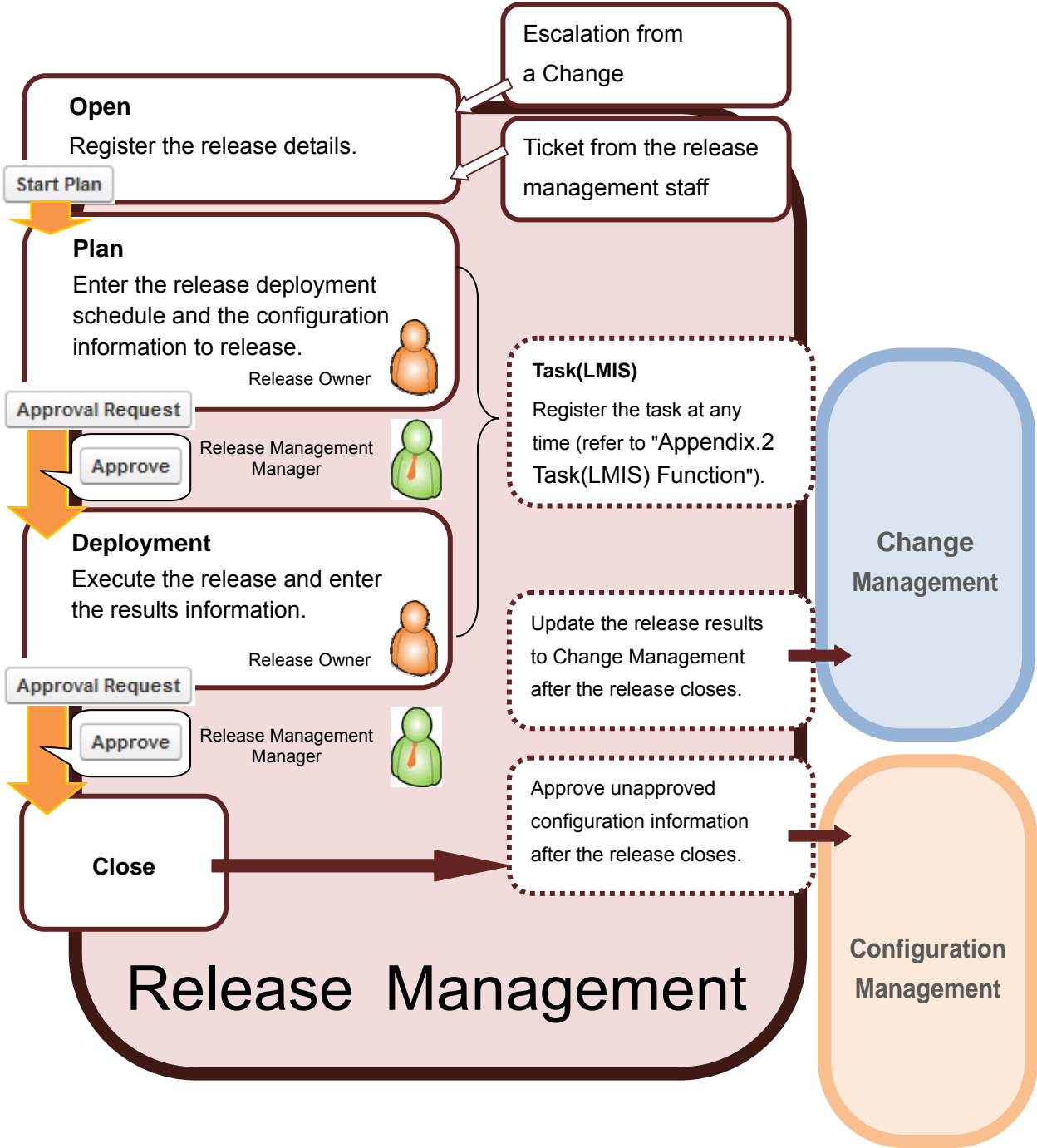
Refer to "Appendix.9 Calendar Registration" for the Calendar Registration procedure and how to display the calendar.

7. Release Management

Manage responses to service and product related inquiries in Release Management. The following workflow diagram provides a graphical illustration to explain the accompanying management procedure.

7.1 Workflow Explanation Diagram

This section explains the workflow and each process in Release Management. The workflow described here is the default workflow provided by this product.



7.2 Reception and Opening

This section explains the procedure to start the release.

7.2.1 Release Reception

This section explains the registration of a new release.

1. Open the Create New screen.

Refer to the previous section "2.8 Creating, Editing and Deleting Records" for details on how to open the screen.

2. Enter the required items in Basic Information.

3. Click the [Save] button.

The entered content is updated in the Release Management detail screen.

A notification is displayed in the release Owner's portal explaining that a release was registered.

This completes the Release Registration procedure.

7.2.2 Change Management Associations

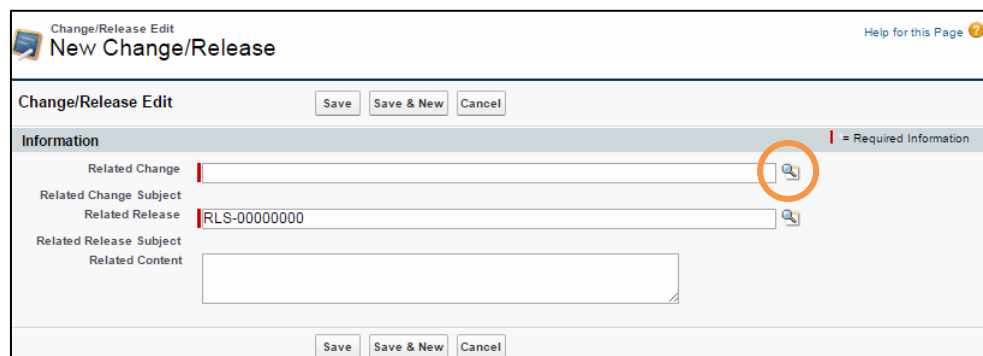
Associate changes with releases. A change can be closed after waiting for the release to be closed by associating it with the release. This section explains the procedure to create an association.

1. Open the Release Management detail screen.

2. Click the [New Change/Release] button in the Related List.

3. Select the change to create an association.

Click the [Related Change Lookup] button (circled area) to search for the change.



4. Click the [Save] button.

Click the [Save & New] button to select another change.

Click the [Cancel] button to stop saving associations.

This completes the release and change associations.

7.3 Release Plan

Enter the start and finish dates for the release work in the Deployment Information. Also enter the configuration information to release.

1. Open the Release Management detail screen.
2. Confirm the [Release Details] and click the [Start Plan] button.

Release Management
RLS-00000006

Customize Page | Printable View | Help for this Page

Release Management History (3) | Notes & Attachments (0) | Related Notification (1) | Related Task (0) | Related Change (0) | Related Release (0) | Related Document (0) | Service to Release (0) | Hardware to Release (0) | Software to Release (0) | Document to Release (0)

Release Management Detail

Edit Start Plan Approval Request Request Cancellation Approve Reject Calendar Registration

Relational Explorer

Open - Plan - Deployment - Close

Guide
The release has been registered.
Start the plan.
To start the plan, press the [Start Plan] button.

▼ Basic Information

Release No	RLS-00000006		
Subject	Portal complete reform in the company		
Status	Open	Substatus	In Progress
Release Type	Delta Release	Owner	Manager [Change]
Received Date and Time	2016/11/04 14:08		
Release Details			

▼ Plan Information

Deployment Scheduled Start Date and Time	Deployment Scheduled End Date and Time
Plan Start Date and Time	Plan End Date and Time
Plan Period (Actual Time)	

Click the [OK] button when the "The plan has been started." message is displayed.

The date that the release plan formulation was started is displayed in [Plan Information].

The release plan has been started.

3. Enter the [Deployment Scheduled Start Date and Time] and [Deployment Scheduled End Date and Time] in [Plan Information].
4. Click the [Save] button.

Also register the configuration information to release if any.

For more details about how to register, refer to "7.3.1 Registering the Configuration Information".

If other documents are required, the files can be attached from the Related List.

5. Click the [Approval Request] button.

Request approval of the [Plan Information] details.

Click the [OK] button when the confirmation message is displayed.

This closes the Release Plan procedure.

Deploy the release after receiving approval.

7.3.1 Registering the Configuration Information

Associate the configuration information so that it is automatically approved when the release is successful. The configuration information to be released can be associated from the Release Management detail screen. In this example, a service is associated with the release.

- 1. Open the Release Management detail screen.**
- 2. Click the [New Release/Service] button in the Related List.**
The Release/Service edit screen is displayed.
- 3. Select the service that you wish to release.**
Click the [Related Service Lookup] button to search for the service.
- 4. Click the [Save] button.**
Click the [Save & New] button to select another service.
Click the [Cancel] button to stop saving associations.

This completes the Configuration Information associations.

It is recommended to create an association after performing Register New Version, because the configuration information contains a version management function for software and documents.

Click the [Register New Version] button on the detail screen of the corresponding software or document and associate it with the release in the unapproved state.

For version management details, refer to section "8.3.2 Version Management".

7.4 Release Deployment

Deploy the release in accordance with the Release Plan. Deploy the release and enter the results information.

1. Open the Release Management detail screen.

The list of configuration information to be released is displayed in the lower area of the Related List.

2. Enter the [Results Information]. Under [Results Information]-[Release Results Type], enter [Succeeded] if the release deployment succeeded or [Failed] if it failed.

3. Click the [Save] button.

4. Click the [Approval Request] button.

Request approval of the [Results Information] details.

Click the [OK] button when the confirmation message is displayed.

This completes the Release Deployment procedure.

The release is closed after receiving approval.

7.5 Approval in Progress, Closing



Approve the Release Plan and the Release Deployment. The following operations are performed by the Release Management Manager.

Confirm the approval request from the portal and open the Release Management detail screen.

◆ To approve

1. **Click the [Approve] button.**

The comment field is displayed.

2. **Enter the comment.**

The approval notification is sent to the release Owner's portal.

3. **The release Owner confirms the details to complete the notification.**

◆ To reject

1. **Click the [Reject] button.**

The comment field is displayed.

2. **Enter the comment.**

3. **The rejection notification is sent to the release Owner's portal.**

The release Owner confirms and modifies the contents and requests approval once again.

* The approval or rejection comment can be set to automatic entry.

For more details, refer to the "LMIS on cloud コンフィグレーションガイド".

The release is closed after the Release Deployment is approved.

If the related change status is [Release Wait] at this time, it is updated to [Released].

The configuration information is also updated in accordance with the contents of [Results Information]-[Release Results Type]. This section explains the automatic configuration update after the release is closed.

◆ If the [Release Results Type] is [Succeeded]:

The unapproved configuration information is approved. If it is already approved, then the status is not updated.

◆ If the [Release Results Type] is not [Succeeded]:

The configuration information remains as unapproved.

Register the release again to re-execute the release.

* The Approver can be changed. For more details, refer to section "Appendix.5 Change Approver".

7.6 Process Improvement

This section explains the functions and usage procedure to improve processes to suit your business.

7.6.1 Change Owner

The release Owner can be changed.

Change the Owner to assign the release to a staff who is well suited to handle the release details.

1. **Open the detail screen of the release to change the Owner.**
2. **Under [Basic Information], click [Change] for [Owner].**

The [Ownership Edit] screen is displayed.

Ownership Edit
RLS-00000000

This screen allows you to transfer a release management from one user to another.

Select New Owner

Transfer this release management RLS-00000000
Owner

Send Notification Email

Save Cancel

3. **Select the Owner.**
Click the [Owner Lookup] button (circled area in the graphic above) to search for the staff.
4. **Click the [Save] button.**
Notification is sent to the new Owner.
This completes the procedure to change the Release Owner.

7.6.2 Change Approval Flow

The release approval flow may be selected in the event of an emergency or if the default approval flow is unsuitable.

(The approval flow must be created in advance. The method for creating the approval flow is explained in "LMIS on cloud コンフィグレーションガイド".)

1. **Open the Release detail screen or the Create New screen.**
2. **Select the approval flow from the dropdown list under [Control Information] and [Approver Decision Method].**

N: The record creator is the "Owner". The Approver is the manager of the "Owner".

Q: The "Owner" or "Approver" can specify the Owner after the record is created.

3. **Click the [Save] button.**

This completes the Change Approval Flow procedure.

Caution

- If the value of "Approver Decision Method" is 'N' and the manager of the "Owner" is not set, then the "Owner" is set as the "Approver".

7.6.3 Work Request

Work relating to the release can be assigned to another user. This related work is called a task (for more details, refer to "Appendix.2 Task(LMIS) Function").

1. **Open the Release detail screen or the Create New screen to register a task for a release.**
2. **Click the [New Task (LMIS)] button under [Related Task].**

The task edit screen is displayed. Enter the required items and save.

3. **Set one of the following from the [Awaiting Task Completion] dropdown list in the [Control Information] section of the Release edit screen.**

ON: Do not make an Approval Request until all of the tasks are closed.

OFF: Make an Approval Request even if the tasks are not closed.

4. **Click the [Save] button.**

This completes the Work Request procedure.

7.6.4 Calendar Registration

Plans, deployment schedules and results can be registered in the calendar. This can be used as a reminder for finishing deadlines or to easily manage schedules to include release plans.

Refer to "Appendix.9 Calendar Registration" for the Calendar Registration procedure and how to display the calendar.

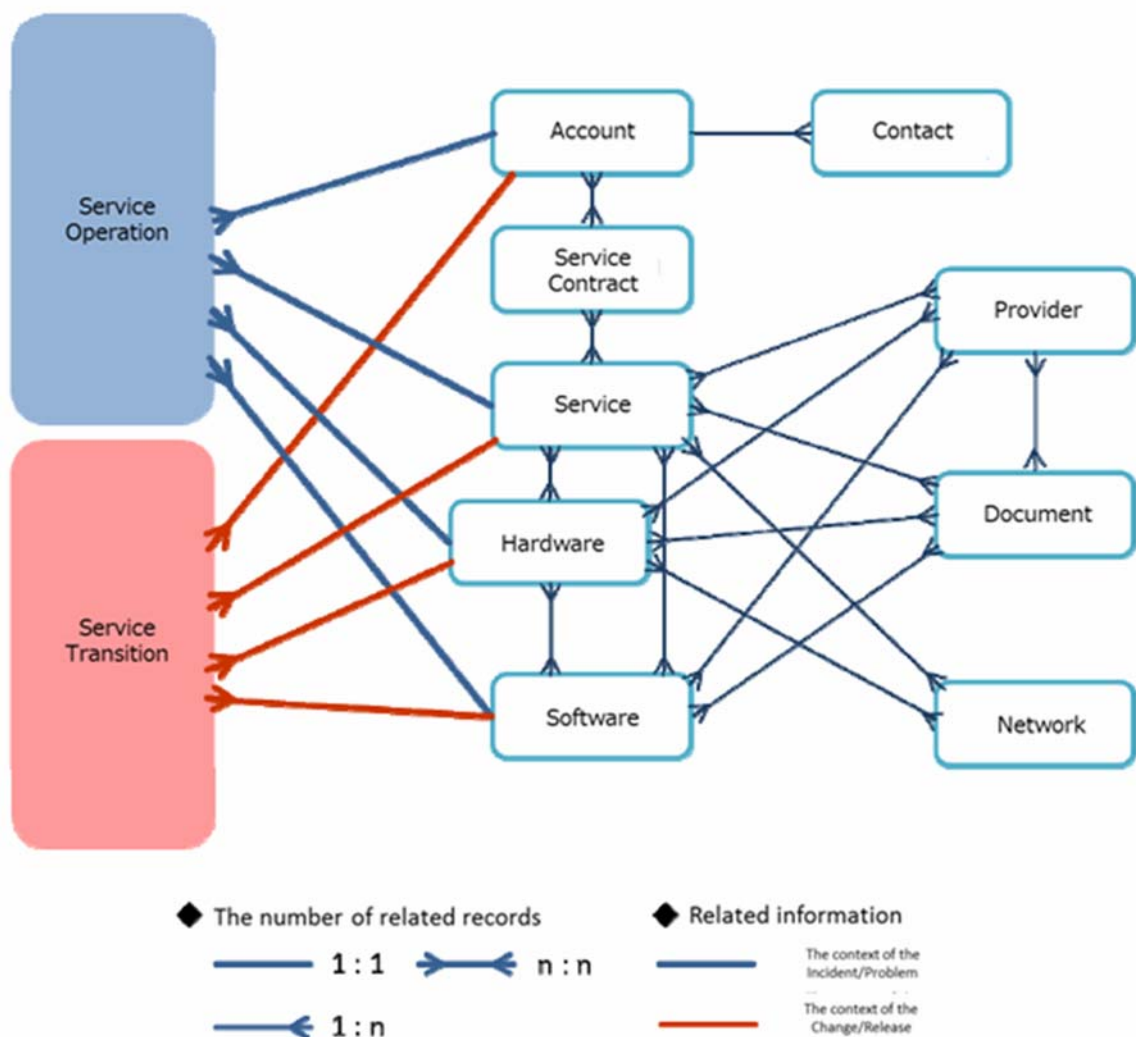
8. Configuration Management

This section explains the management of configuration information.

8.1 Types of Configuration Information

This section explains the types of configuration information and the items included in the configuration information.

The graphic below illustrates the relationships between each type of configuration information.



The following explains the items included in each type of configuration information.

8.1.1 Service

Service refers to the services provided to customer companies.

Manage services from the [LMIS Configuration Management] apps menu.

The following items may be listed.

Basic Information	
Service Name	Enter the name of the service.
Abandon	Display if the status is abandon. Check to set the status to abandon.
Details	Enter the service details.
Purchase Information	
Provider	Enter the number of the service provider.
Provider Name	Enter the name of the service provider. If the Provider is entered, then the name is set automatically when saving the record.
Related Information	
Related Service	Enter the service number of the related service.
Related Service Name	The name of the related service. If the Related Service is entered, then the name is set automatically when saving the record.
SLO Information	
Service Period	Enter the Due Date number for the period of service provision.
Incident Response Time	Enter the time (h) to finish the response to the incident which occurred in this service.
Problem Response Time	Enter the time (h) to finish the response to the problem which occurred in this service.
Service Start Date and Time	Enter the start date and time for the period of service provision. If the Service Period is entered, then the date and time is set automatically when saving the record.
Service End Date and Time	Enter the end date and time for the period of service provision. If the Service Period is entered, then the date and time is set automatically when saving the record.
Service Provision Start Time	Enter the time to start providing the service.
Service Provision End Time	Enter the time to end providing the service.
Service Provision Day of Week	Enter the days of week on which the service is provided.

Impact Information (*1)	
Number of Users	Enter the number of users using the service.
Service Unit Price	Enter the service unit price.
Billing Amount	<p>This is the billing amount for the service. This field is automatically populated when the record is saved based on the entered number of users and service unit price. This is the impact value used for the impact display.</p> <p>*The billing amount is calculated according to the following expression: Billing amount = Number of users x Service unit price</p>

*1 Impact information: The fields are used for the impact display. Refer to "Appendix.8 Relational Explorer" for more information on the impact display.

8.1.2 Hardware

Hardware refers to the personal computers, servers, printers and other devices managed within the company. Manage services from the [LMIS Configuration Management] apps menu.

The following items may be listed.

Basic Information	
Hardware Name	The name of the hardware.
Abandon	Display if the status is abandon. Check to set the status to abandon.
Hardware Type	Select PC, Server, Printer, Non-IT Resource, etc.
CPU (GHz)	Enter for a PC or Server.
Number of CPUs	Enter for a PC or Server.
Memory (MB)	Enter for a PC.
Disk Capacity (GB)	Enter for a PC.
Manufacturer	Enter the hardware manufacturer.
Model Name/Number	Enter the model name or model number of the hardware.
Serial Number	Enter the serial number of the hardware.
Person in Charge	Enter the name of the person in charge of the hardware.
Installation Location	Enter the hardware installation location.
Printer Functions	Select one or more options from the following printer functions: Printer, Copy, Scan, and FAX.
PPM	Enter the PPM of the printer.
Owner Type	Select individual or company for the type of mobile device owner.
Switch Capacity (Gps)	Enter the switch capacity (Gps) of the network equipment.
Number of MAC Addresses	Enter the number of MAC addresses for the network equipment.
ACL Filter	Select one or more ACL filter options from the following: L2, L3, and L4.
VLAN	Represents whether VLANs are enabled or disabled on the network equipment. Select this check box when there is a configured VLAN.
VRRP	Represents whether VRRP is enabled or disabled on the network equipment. Select this check box when there is a configured VRRP.
Capacity (U)	Enter the rack capacity.
Maximum Load Weight Capacity (kg)	Enter the maximum load weight capacity (kg) of the rack.
Width (mm)	Enter the width (mm) of the hardware.

Depth (mm)	Enter the depth (mm) of the hardware.
Height (mm)	Enter the height (mm) of the hardware.
Weight (kg)	Enter the weight (kg) of the hardware.
Aseismic Protection	Represents whether the hardware provides aseismic protection. Select this check box when the hardware provides aseismic protection.
Usage Status	
Total Number of Contracts	Automatically calculate the total number of contracts with the provider.
Number allocated	Automatically calculate the number of software allocations.
Hardware Information	
Resource Number	Enter the Resource Number.
Hardware Details	Enter the hardware detail information.
Virtual Environment	Indicates if the hardware is virtual. Select TRUE for virtual hardware.
Environment Type	Select the environment type from the following: Production, Maintenance, Development/Deployment, and Staging.
Support Information	
Support Period	Enter the Due Date number for the hardware support application period.
Support Start Date and Time	This is the start date and time of the support application period. If the Support Period is entered, then the date and time is set automatically when saving the record.
Support End Date and Time	Enter the end date and time for the support application period. If the Support Period is entered, then the date and time is set automatically when saving the record.
Purchase Information	
Purchase Date and Time	Enter the date that the hardware was purchased.
Purchase Price	Enter the purchase price of the hardware.
Provider	Enter the number of the hardware provider.
Provider Name	Enter the name of the hardware provider. If the Provider is entered, then the name is set automatically when saving the record.
Depreciation Period (months)	Enter the hardware Depreciation Period (in months).
Depreciation Date and Time	Enter the hardware Depreciation Date and Time. If the Depreciation Period (months) is entered, then the date and time is set automatically when saving the record.

Related Information	
Higher Layer Hardware	Enter the hardware number of the higher layer hardware.
Name of Higher Layer Hardware	This is the name of the higher layer hardware. This field is automatically populated when the record is saved based on the higher layer hardware that you entered.
Network Segment	Enter the network number of the network segment.

* The Network Segment field in the Related Information section specifies a parent network to which the hardware belongs. On the other hand, the network information section at the bottom of the hardware screen specifies a child network that belongs to the hardware.

The following table lists the management fields for each record type.

*Refer to the "コンフィグレーションガイド" for more information on record types.

Field Name	Record Type Name						
	PC	Server	Printer	Mobile Device	Rack	Network Equipment	Non-IT Resource
Hardware Name	○	○	○	○	○	○	○
Abandon	○	○	○	○	○	○	○
Hardware Type	○	○	○	○	○	○	○
CPU(GHz)	○	○		○			
Number of CPUs	○	○					
Support Period	○	○	○	○	○	○	○
Memory (MB)	○	○	○	○			
Disk Capacity (GB)	○	○					
Support Start Date and Time	○	○	○	○	○	○	○
Support End Date and Time	○	○	○	○	○	○	○
Manufacturer	○	○	○	○	○	○	○
Model Name/Number	○	○	○	○	○	○	○
Serial Number	○	○	○	○	○	○	○
Purchase Price	○	○	○	○	○	○	○
Person in Charge	○	○	○	○	○	○	○
Installation Location	○	○	○		○	○	○
Printer Functions			○				
PPM			○				
Owner Type				○			
Switch Capacity (Gps)						○	
Number of MAC Addresses						○	

Field Name	Record Type Name						
	PC	Server	Printer	Mobile Device	Rack	Network Equipment	Non-IT Resource
ACL Filter						<input type="radio"/>	
VLAN						<input type="radio"/>	
VRRP						<input type="radio"/>	
Capacity (U)					<input type="radio"/>		
Maximum Load Weight Capacity (kg)					<input type="radio"/>		
Width (mm)		<input type="radio"/>	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	
Depth (mm)		<input type="radio"/>	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	
Height (mm)		<input type="radio"/>	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	
Weight (kg)		<input type="radio"/>	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	
Aseismic Protection			<input type="radio"/>		<input type="radio"/>		
Total Number of Contracts							
Number allocated							
Resource Number	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hardware Details	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Virtual Environment	<input type="radio"/>	<input type="radio"/>				<input type="radio"/>	
Environment Type	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Purchase Date and Time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provider	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provider Name	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Depreciation Period (Months)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Depreciation Date and Time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Higher Layer Hardware	<input type="radio"/>	<input type="radio"/>			<input type="radio"/>	<input type="radio"/>	

Field Name	Record Type Name						
	PC	Server	Printer	Mobile Device	Rack	Network Equipment	Non-IT Resource
Name of Higher Layer Hardware	<input type="radio"/>	<input type="radio"/>			<input type="radio"/>	<input type="radio"/>	
Network Segment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

The following table lists the management fields for each master profile.

Field Name	Profile Name		
	System Administrator	Staff	Process Manager
Hardware Name	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Abandon	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hardware Type	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
CPU(GHz)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Number of CPUs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Support Period	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Memory (MB)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Disk Capacity (GB)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Support Start Date and Time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Support End Date and Time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Manufacturer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Model Name/Number	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Serial Number	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Purchase Price	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Person in Charge	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Installation Location	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Printer Functions			
PPM			
Owner Type			
Switch Capacity (Gps)			
Number of MAC Addresses			
ACL Filter			
VLAN			
VRRP			

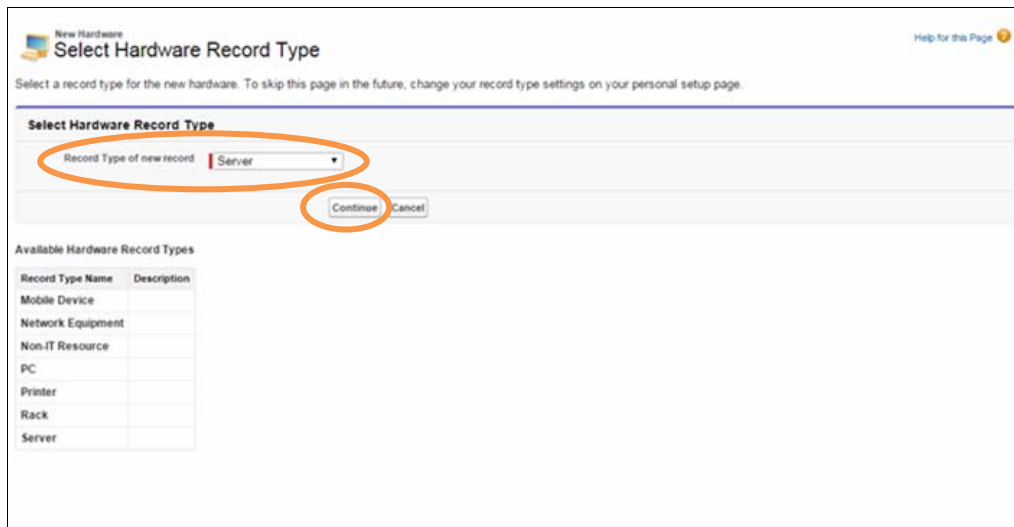
Field Name	Profile Name		
	System Administrator	Staff	Process Manager
Capacity (U)			
Maximum Load Weight Capacity (kg)			
Width (mm)			
Depth (mm)			
Height (mm)			
Weight (kg)			
Aseismic Protection			
Total Number of Contracts			
Number allocated			
Resource Number	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hardware Details	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Virtual Environment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Environment Type	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Purchase Date and Time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provider	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provider Name	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Depreciation Period (Months)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Depreciation Date and Time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Higher Layer Hardware	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Name of Higher Layer Hardware	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Network Segment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

The following section describes how to create a new hardware record when you configure a record type.

1. Open the Create New screen.

Refer to the previous section "2.8 Creating, Editing and Deleting Records" for details on opening the screen.

2. Select a record type from the [Record Type for new record] pull-down list, and click the [Continue] button.



New Hardware
Select Hardware Record Type [Help for this Page](#)

Select a record type for the new hardware. To skip this page in the future, change your record type settings on your personal setup page.

Select Hardware Record Type

Record Type of new record:

Available Hardware Record Types

Record Type Name	Description
Mobile Device	
Network Equipment	
Non-IT Resource	
PC	
Printer	
Rack	
Server	

3. The Edit Record screen appears. Fill in the fields as necessary, and click the [Save] button.

The new hardware record is created when you configure a record type.

8.1.3 Network

Network refers to the network managed within the company. Manage the network used to provide the operations and services.

Manage services from the [LMIS Configuration Management] apps menu.

The following items may be listed.

Information	
Network Identifier Name	Enter the name of the network.
Usage Status	Select whether the Usage Status of a network is Unused or In Use.
Network Device Type	Select whether a network device is wired or wireless.
Network Information Details	Enter the network information details.
Resource Number	Enter the Resource Number.
Related Hardware	Enter the hardware number of the related hardware.
Related Hardware Name	The name of the related hardware. If the Related Hardware is entered, then the name is set automatically when saving the record.
Address Type	Enter the address type. Select fixed address or dynamic address.
IP Address	Enter the IP address.
MAC Address	Enter the MAC address.
Subnet Mask	Enter the subnet mask.
Default Gateway	Enter the default gateway.
Usage Status	
Total Number of Contracts	Automatically calculate the total number of contracts with the provider.

The following table lists the management fields for each record type.

*Refer to the "コンフィグレーションガイド" for more information on record types.

Field name	Record Type Name	
	Network	Segment
Network Identifier Name		○
Usage Status	○	○
Network Device Type	○	○
Network Information Details		○
Resource Number		
Related Hardware	○	
Related Hardware Name	○	
Address Type	○	○
IP Address	○	○
MAC Address	○	○
Subnet Mask		○
Default Gateway		○
Total Number of Contracts		

The following table lists the management fields for each master profile.

Field name	Profile Name		
	System Administrator	Staff	Process Manager
Network Identifier Name	○	○	○
Usage Status	○	○	○
Network Device Type	○	○	○
Network Information Details	○	○	○
Resource Number			
Related Hardware	○	○	○
Related Hardware Name	○	○	○
Address Type	○	○	○
IP Address	○	○	○
MAC Address	○	○	○
Subnet Mask			
Default Gateway			
Total Number of Contracts			

The following section describes how to create a new network record when you configure a record type.

1. Open the Create New screen.

Refer to the previous section "2.8 Creating, Editing and Deleting Records" for details on how to open the screen.

2. Select a record type from the [Record Type for new record] pull-down list, and click the [Continue] button.

Record Type Name	Description
Network	
Segment	

3. The Edit Record screen appears. Fill in the fields as necessary, and click the [Save] button.

Now, the new network record is created when you configure a record type.

8.1.4 Software

Software refers to the software managed within the company. Manage the software used to provide the operations and services.

Manage services from the [LMIS Configuration Management] apps menu.

The following items may be listed.

Basic Information	
Software Name	Enter the name of the software.
Abandon	Display if the status is abandon. Check to set the status to abandon.
Software Type	Select OS, Middleware, Apps, or Service.
Edition	Enter the edition of the software.
License Category	Select managed or unmanaged for the license category.
Support Period	Enter the Due Date number for the software support application period.
Version	Enter the version of the software.
License Count	The number of licenses owned.
Support Start Date and Time	The start date and time for the support application period. If the Support Period is set, then the date and time is set automatically when saving the record.
Support End Date and Time	Enter the end date and time for the support application period. If the Support Period is set, then the date and time is set automatically when saving the record.
Usage Status	
Total Number of Contracts	Automatically calculate the total number of contracts with the provider.
Number allocated	Automatically calculate the number allocated to hardware.
Detailed Information	
Resource Number	Enter the Resource Number.
Software Details	Enter the software detail information.
Purchase Information	
Purchase Date and Time	Enter the software purchase date and time.
Provider	Enter the number of the software provider.
Provider Name	Enter the name of the software provider. If the Provider is entered, then the name is set automatically when saving the record.

Depreciation Period (months)	Enter the Depreciation Period of the software.
Depreciation Date and Time	Enter the software Depreciation Date and Time. If the Depreciation Period (months) is entered, then the date and time is set automatically when saving the record.
Related Information	
Related Software	Enter the software number of the related software.
Related Software Name	The name of the related software. If the Related Software is entered, then the name is set automatically when saving the record.

8.1.5 Document (LMIS)

Document (LMIS) refers to guidebooks, design documents and other documents.

Manage services from the [LMIS Configuration Management] apps menu.

Attach the document file from the Related List or enter the upload destination URL in the [External URL].

The following items may be listed.

Basic Information	
Document Name	Enter the name of the document.
Abandon	Display if the status is abandon. Check to set the status to abandon.
Document Type	Select Guidebooks, Design Resource, Investigation Material, or Other for the Document Type.
External URL	Enter the upload destination URL of the document.
Version	Enter the version of the document.
Related Information	
Related Event	Enter the event number of the event related to the document.
Related Incident	Enter the incident number of the incident related to the document.
Related Problem	Enter the problem number of the problem related to the document.
Related Change	Enter the change number of the change related to the document.
Related Release	Enter the release number of the release related to the document.
Related Task	Enter the task number of the task related to the document.
Related Notification	Enter the notification number of the notification related to the document.
Related Provider	Enter the provider number of the provider related to the document.
Related Due Date	Enter the due date number of the due date related to the document.
Related Document	Enter the document number of the document related to the document.

8.1.6 Account

Accounts are organizations, companies, and consumers for which you want to know the status.

This information is used for customer company information registered in events and incidents or services and accounts related to service contract information.

Manage accounts from the [LMIS Contract Management] apps menu.

The following items may be listed.

Account Information	
Account Name	Enter the company name for the account.
Parent Account	Enter the Account Name of the parent company for the account.
Phone	Enter the phone number.
Fax	Enter the fax number.
Website	Enter the URL of the Website for the account.
Additional Information	
Type	Select the type of account as viewed by the company (prospect, direct sale, partner sale, etc.).
Industry	Select the industry.
Employees	Enter the number of employees for the account.
Annual Revenue	Enter the annual revenue for the account.
Description	Enter a description of the account.
Billing Country	Enter the invoice billing address of the account.
Billing Zip/Postal Code	
Billing State/Province	
Billing City	
Billing Street	
Shipping Country	Enter the delivery address of the account.
Shipping Zip/Postal Code	
Shipping State/Province	
Shipping City	
Shipping Street	

Site Information	
ReportTo	This is the pre-approver for the Self Service Portal. Enter the Accounts Superior of the account to which the contact (Self Service Portal user) belongs.
Share	Set whether or not to share registered records among Self Service Portal users that belong to the same account.

8.1.7 Contact

A Contact is an individual associated with the Account described above.

This information is used for the Customer Representative information registered in events and incidents.

Manage accounts from the [LMIS Contract Management] apps menu.

The following items may be listed.

Contact Information	
Last Name	Enter the last name for the contact.
First Name	Enter the first name for the contact.
Account Name	Enter the account name that the contact belongs to. If it is empty and saved, then the account name is registered as "@Unallocated".
Title	Enter the title of the contact.
Phone	Enter the phone number of the contact.
Mobile	Enter the mobile phone number of the contact.
Email	Enter the email of the contact.
Reports To	This is the pre-approver for the Self Service Portal. *This has priority over the Accounts Superior. Enter the name of the person that the contact reports to.
Delegated Approver	A delegated approver can be assigned when pre-authorization is required. *This field is not displayed by default settings.
Delegated Approval Period From	The start date and time for the delegated approver validity period. If specified, delegated approval cannot be used until the specified date and time have passed. If not specified or past date and time are specified, delegated approval can be used immediately. *This field is not displayed by default settings.
Delegated Approval Period To	The end date of the delegated approval validity period. If specified, delegated approval cannot be used after the specified date and time. If not specified, there is no deadline for delegated approval period. *This field is not displayed by default settings.

Address Information	
Mailing Country	Enter the address for the contact.
Mailing Zip/Postal Code	
Mailing State/Province	
Mailing City	
Mailing Street	
Other Country	Enter the other address for the contact.
Other Zip/Postal Code	
Other State/Province	
Other City	
Other Street	
Additional Information	
Fax	Enter the fax number of the contact.
Home Phone	Enter the home phone number of the contact.
Other Phone	Enter the other phone number of the contact.
Assistant	Enter the last name and first name of the contact's assistant (subordinate).
Asst. Phone	Enter the phone number of the assistant.
Lead Source	Enter the method initially used to reach the contact.
Birthdate	Enter the birthdate of the contact.
Department	Enter the department that the contact belongs to.
Portal User Information	
Invalid	Set whether to enable or disable the contact (Self Service Portal user).
Password	Set the contact's password (Self Service Portal user). *Used as the login password for the Self Service Portal.
startdate	Enter the start date for the Self Service Portal user. * The Self Service Portal cannot be used before the start date.
enddate	Enter the end date for the Self Service Portal user. *The Self Service Portal cannot be used after the end date.
Detailed Information	
Description	Enter a description of the contact.

8.1.8 Service Contract

The Service Contract is the contract information exchanged with the customer (account) regarding the type of customer support for each service.

Manage accounts from the [LMIS Contract Management] apps menu.

The following items may be listed.

Information	
Related Service	Enter the service number of the related service.
Related Service Name	The name of the related service. If the Related Service is entered, then the name is set automatically when saving the record.
Related Account	Enter the name of the related account.
Related Content	Enter the related content.
SLO Information	
Contract Period	The service contract period. Create the contract period in the Period Management beforehand.
Incident Response Time	Enter the target response time for the incident. The response time set here takes priority over the time set under Related Service.
Contract Start Date and Time	Enter the date and time that the contract starts. If the Contract Period is entered, then the date and time is set automatically when saving the record.
Contract End Date and Time	Enter the date and time that the contract ends. If the Contract Period is entered, then the date and time is set automatically when saving the record.
Service Provision Start Time	Enter the time to start providing the service.
Service Provision End Time	Enter the time to end providing the service.
Service Provision Day of Week	Enter the days of week on which the service is provided.

Impact Information (*1)	
Number of Users	Enter the number of users using the service.
Service Unit Price	Enter the service unit price.
Billing Amount	<p>This is the billing amount for the service. This field is automatically populated when the record is saved based on the entered number of users and service unit price. This is the impact value used for the impact display.</p> <p>*The billing amount is calculated according to the following expression:</p> <p>Billing amount = Number of users x Service unit price</p>

*1 Impact Information: The fields are used for the impact display. Refer to " Appendix.8 Relational Explorer" for more information on the impact display.

8.1.9 Provider

The Provider is the company that provides the software and hardware.

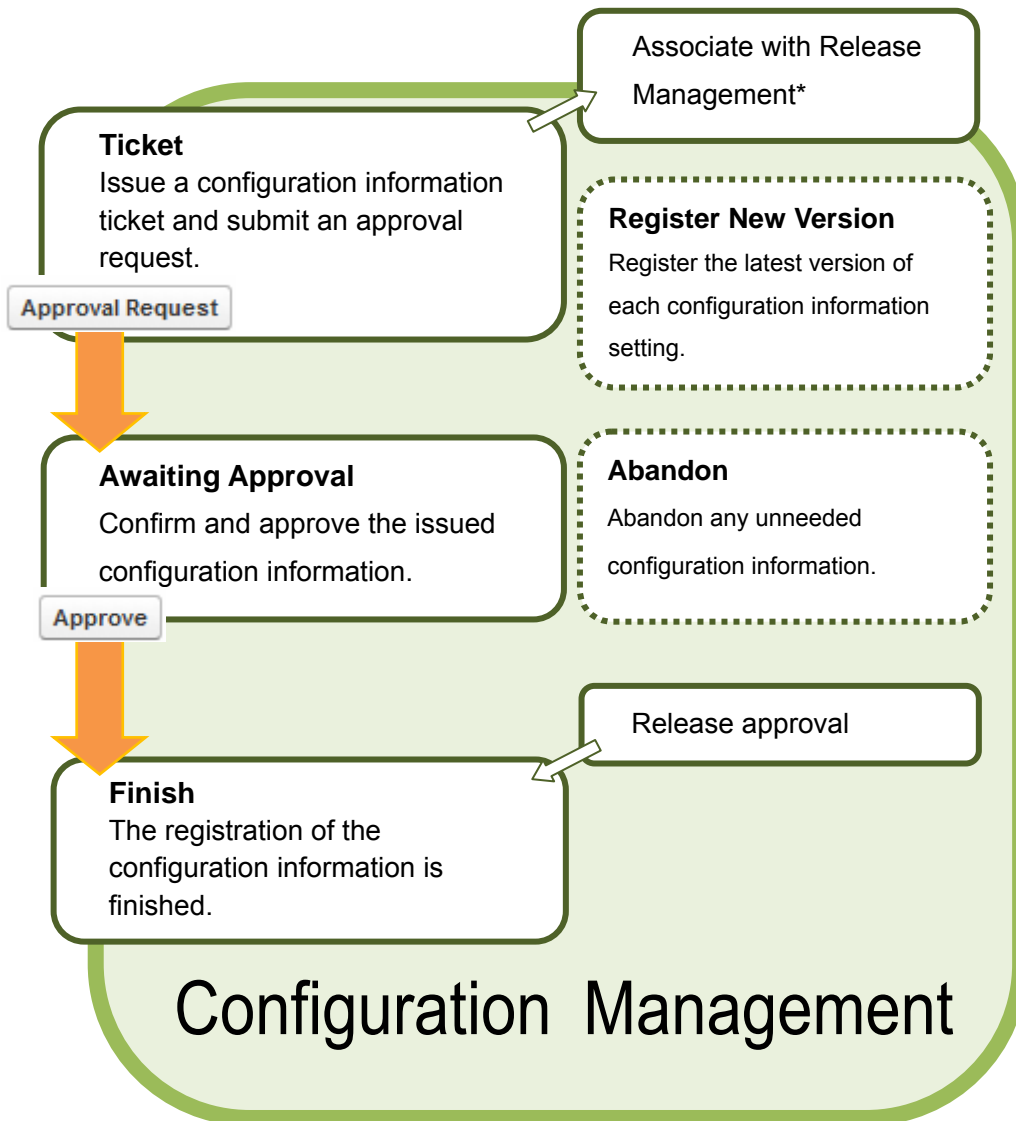
Manage providers from the [LMIS Contract Management] apps menu.

The following items may be listed.

Information	
Provider Name	Enter the name of the provider.
Site	Enter the URL of the provider.
Contract Information	
Contract Category	Select Purchasing/Maintenance, Lease, etc. for the Contract Category.
Contract State	"計画(Plan)", "使用(Usage)", "完了(Finish)" are set automatically from the Contract Start Date and Contract End Date.
Contract Identifier Number	Enter the contract identifier number.
Contract Period	Enter the contract period.
Contract Start Date	The start date of the contract with the provider.
Contract End Date	The end date of the contract with the provider.
Payment Information	
Total Contract Price	Automatically calculate the total contract price for the hardware, software, and network.
Hardware Contract Price	Automatically calculate the total contract price for the hardware.
Software Contract Price	Automatically calculate the total contract price for the software.
Network Contract Price	Automatically calculate the total contract price for the network.

8.2 Workflow Description

The following explains the Configuration Management workflow.



* Refer to "7.3.1 Registering the Configuration Information" to issue a ticket from the Release Management of the Configuration Management information.

8.2.1 Ticket

To add the configuration information described above, issue a ticket for the Configuration Management information.

This example describes the operations for issuing a service ticket.

- 1. Open the Create New screen.**

Refer to the previous section "2.8 Creating, Editing and Deleting Records" for details on how to open the screen.

- 2. Enter the required items.**

- 3. Click the [Save] button.**

The entered content is updated in the Service detail screen.

Notification that the configuration information was registered is sent to the Owner's portal.

- 4. Click the [Approval Request] button.**

Notification is sent to the portal of the Approver.

This completes the procedure to issue a ticket.

8.2.2 Associate

Issue a ticket for each configuration information setting to create an association.

This example associates hardware with a service.

The following explanation presumes that tickets are already issued for the service and hardware.

1. Open the Edit Service screen.

Refer to the previous section "2.8 Creating, Editing and Deleting Records" for details on how to open the screen.

2. Create an association for each configuration information setting from the Related List. Next, click the [New Service/Hardware] button.

- When the Service/Hardware Edit screen is displayed, enter the hardware number in [Related Hardware] and click the [Save] button.

Service/Hardware Edit
New Service/Hardware

Application Status: Not Applied

Related Service: SVC-00000000

Related Hardware: HDW-00000000

Related Service Name: _____

Related Hardware Name: _____

CPU Allocation: _____ CPU Usage: _____

Memory Allocation: _____ Memory Usage: _____

Disk Allocation: _____ Disk Usage: _____

Related Content: _____

Buttons: Save, Save & New, Cancel

The hardware is now associated with the service.

Related Change: New Change Management

No records to display

Related Service: New Service

No records to display

Related Hardware: New Service/Hardware

Action	Hardware No	Status	Hardware Name	Hardware Type	Support Start Date and Time	Support End Date and Time	Last Modified Date
Edit Del	HDW-00000000	Not Approved	Server A	Server			2015/07/23

Related Software: New Service/Software

No records to display

Related Document: New Service/Document(LMIS)

No records to display

Service Contract: New Service Contract

No records to display

Service Change: New Change/Service

No records to display

To register a network in hardware, open the Hardware detail screen, click the [New Network] button and associate the network.

Related Service: New Service/Hardware

Action	Service No	Status	Service Name	Service Start Date and Time	Service End Date and Time	Last Modified Date
Edit Del	SVC-00000000	Not Approved	PC repair			2015/07/23

Related Hardware: New Hardware

No records to display

Related Network: New Network

No records to display

Related Software: New Hardware/Software

No records to display

Related Document: New Hardware/Document(LMIS)

No records to display

Hardware Change: New Change/Hardware

No records to display

Hardware Release: New Release/Hardware

No records to display

8.2.3 Approval Finished

Approve the registered configuration information.

The configuration information associated with a release is automatically approved when the release closes.

This section explains the procedure to directly approve the configuration information. This operation is performed by the user who is set as the "Approver".

Confirm the approval request from the portal and open the Configuration Management detail screen.

Confirm the registered content.

◆ To approve

1. Click the [Approve] button.

The comment field is displayed.

2. Enter the comment.

The Approval Notification is sent to the Owner's portal.

3. The approval is finished when the Owner confirms the content.

◆ To reject

1. Click the [Reject] button.

The comment field is displayed.

2. Enter the comment and click the [OK] button.

The Rejection Notification is sent to the Owner's portal.

The Owner confirms the content and issues an Approval Request again after making corrections.

* Notification can be sent by Email as well as to the portal. For more details, refer to section "Appendix.1 Notification Function".

* The Approver can be changed. For more details, refer to section "Appendix.5 Change Approver".

* Approval or rejection comments can be set to automatic entry.

For more details, refer to the "LMIS on cloud コンフィグレーションガイド".

8.2.4 Abandon

Abandon the registered configuration information.

Abandon does not delete the record itself but indicates that it has been discarded.

This example explains the procedure to abandon a document.

1. Display the detail screen of the document you wish to abandon.
2. Check the [Abandon] box under Basic Information.

Document(LMIS) Detail

Document No: DOC-00000000

Document Name: LMIS on cloud Users Guide

Status: Not Approved

Owner: Staff [Change]

Version: 1

Document Type: Guidebooks

External URL:

The 'Abandon' checkbox is circled in orange.

3. Click the [Save] button.

This completes the procedure to abandon the document.

Configuration Information settings with a checked [Abandon] box can be confirmed in the All Abandoned Documents view.

All Abandoned Documents

Action	Document No	Status	Document Name	Document Type	Version	Last Modified Date
Edit	DOC-00000000	Not Approved	LMIS on cloud Users Gu...	Guidebooks	1	2015/07/23

8.3 Process Improvement

8.3.1 Service Level Management

The service level can be set for each service and service contract.

The setting enables the following automation in processes associated with services or service contracts that you set:

- **Target Time Settings**

The target answer time in Incident Management and the target investigation time in Problem Management can be automatically populated based on the values specified for the service and service contract (for Incident Management only).

- **Business Hours Settings**

The actual operating times (such as actual hours spent for closure and actual investigation time) in Event Management, Incident Management, Problem Management, and Change Management, and the deadlines (such as primary answer deadline and investigation deadline) in Incident Management and Problem Management can be calculated based on the business hours of the service and service contract (for Incident Management only).

The following figures illustrate how the target time is automatically populated based on the business hours in Incident Management.

1. Standard time

```

Incident Management
Accept datetime:2015/01/05 10:00
Target Answer Time:24
Primary Answer Deadline:2015/01/06 10:00
~~
Close Date and Time:2015/01/06 11:00
Time Until Close:25:00
    
```

Normally, deadlines and performances are calculated simply using the value specified in the record.

2. When using the service target time

```

Incident Management
Accept datetime:2015/01/05 10:00
Target Answer Time:12
Primary Answer Deadline:2015/01/05 22:00
Related Service:ServiceA
~~
Close Date and Time:2015/01/06 11:00
Time Until Close:25:00
    
```

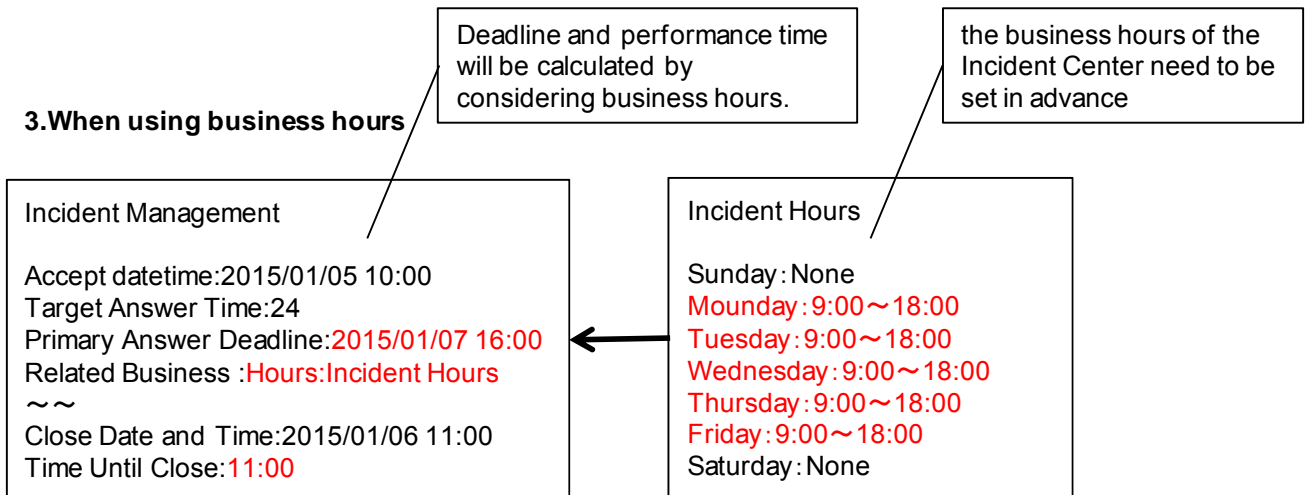
Service level of incidents adopts that of related services.

The service level of service needs to be set up in advance.

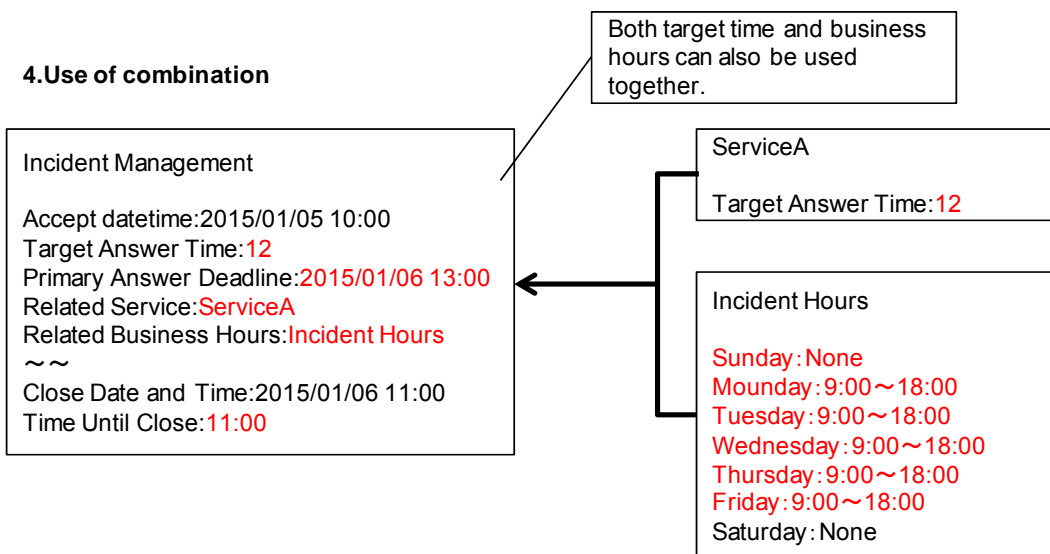
```

ServiceA
Target Answer Time:12
    
```

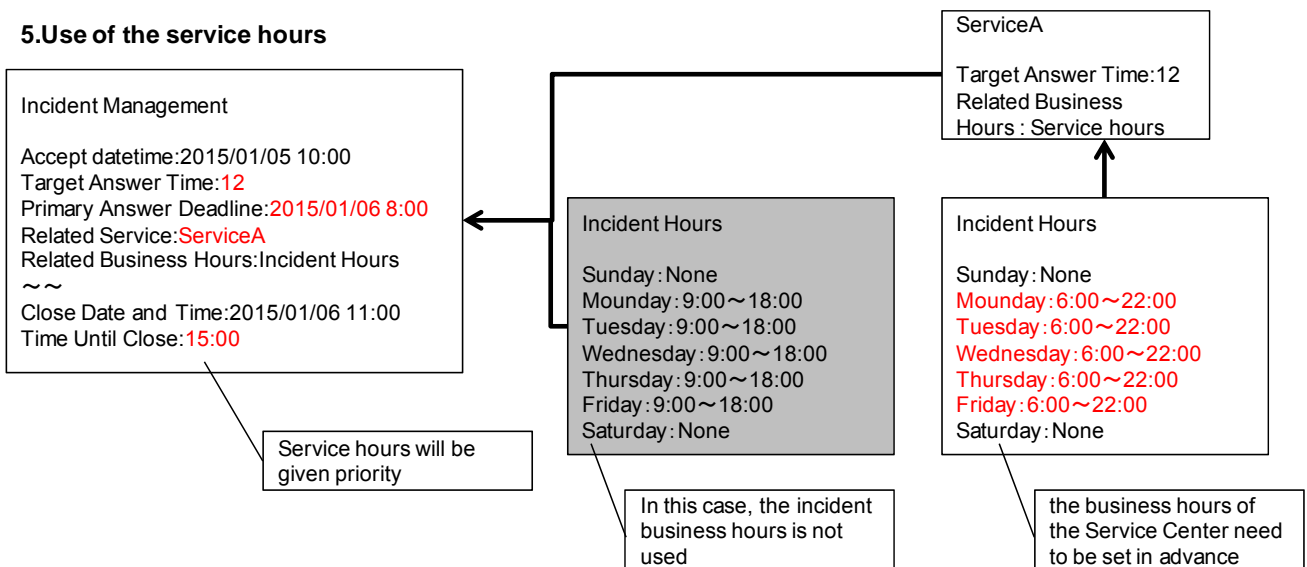

3. When using business hours



4. Use of combination



5. Use of the service hours



Note

- Business hours are prioritized in the following order.
 Service Contract > Service > Process > Default business hours

The following section describes the procedure to configure the target times and business hours.

◆ **Configuring the target times**

1. **Open the detail screen or Create New screen of a record in Incident Management or Problem Management.**

2. **Select one of the following in [Apply SLO] under [Control Information].**

ON: Prioritize the response time registered in the SLO information of the service or service contract (manual setting).

CREATEONLY: Prioritize the response time registered in the SLO information of the service or service contract only when registering a new entry (automatic setting).

OFF: Directly set the response time (manual setting).

3. **Click the [Save] button.**

This completes the service level setting for target times.

◆ **Configuring the business hours**

1. **Open the detail screen or Create New screen of a service or service contract record.**

2. **Configure the desired business hours in [Related Business Hours] under [SLO Information].**

3. **Click the [Save] button.**

When you enter business hours in [Related Business Hours] and save them, [Service Provision Start Time], [Service Provision End Time], and [Service Provision Day of Week] are automatically updated based on the business hours that you entered. You can check the fields for your changes.

This completes the service level setting for business hours.

8.3.2 Version Management

This section explains the version management operations for software and documents. Software and documents can be managed by differentiating between different versions of software and documents with the same name.

◆ Registering a new version

The configuration information of the existing version must be "Approved" in order to register the configuration information of the new version.

1. Display the detail screen of the software or document to add a new version.
2. Click the [Register New Version] button.

Configuration information is created with the same document name and a different document number.

The screenshot shows the 'Document(LMIS) Detail' page for document 'DOC-00000001'. The page includes a navigation bar with 'Home', 'Services', 'Hardwares', 'Networks', 'Softwares', and 'Documents(LMIS)'. The document details are as follows:

Document(LMIS) Detail	
Document No	DOC-00000001
Document Name	LMIS on cloud Users Guide
Status	Not Approved
Abandon	<input type="checkbox"/>
Document Type	Guidebooks
External URL	
Owner	Manager [Change]
Version	

The 'Register New Version' button is circled in orange. Below the details, there is a 'Related Information' section with fields for Related Event, Related Incident, Related Problem, Related Change, Related Release, Related Task, Related Notification, Related Provider, Related Due Date, and Related Document (DOC-00000000).

3. Click the [Edit] button and enter the required items.
4. Click the [Save] button.
5. Click the [Approval Request] button.

Notification is sent to the portal of the Approver.

◆ **Approving a new version**

Confirm the approval request from the portal and open the Configuration Management detail screen.

To approve

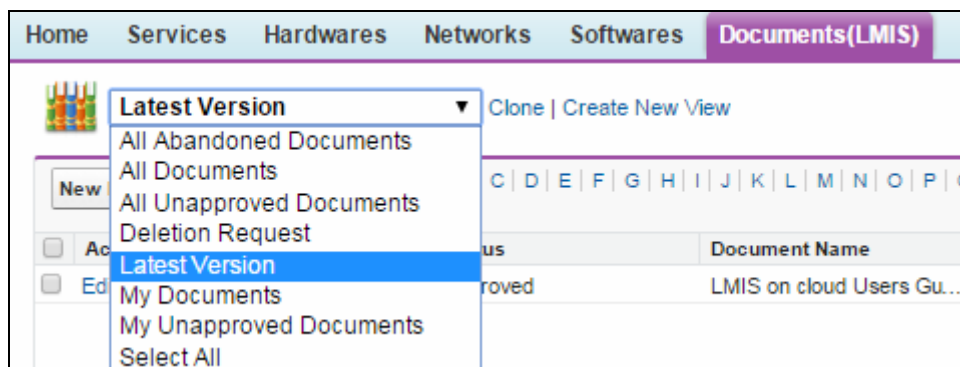
1. **Click the [Approve] button.**
The comment field is displayed.
2. **Enter the comment.**
The Approval Notification is sent to the Owner's portal.
3. **The approval is finished when the Owner confirms the content.**

To reject

1. **Click the [Reject] button.**
The comment field is displayed.
2. **Enter the comment.**
3. **The Rejection Notification is sent to the Owner's portal.**

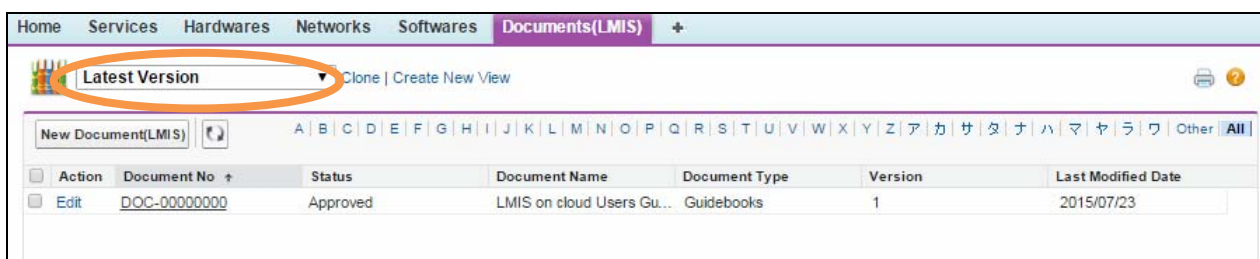
◆ **Confirming a new version**

1. **Click the document or software tab to display the home screen.**



2. **Click the document or software tab to display the home screen.**

Display a list of the latest document versions.

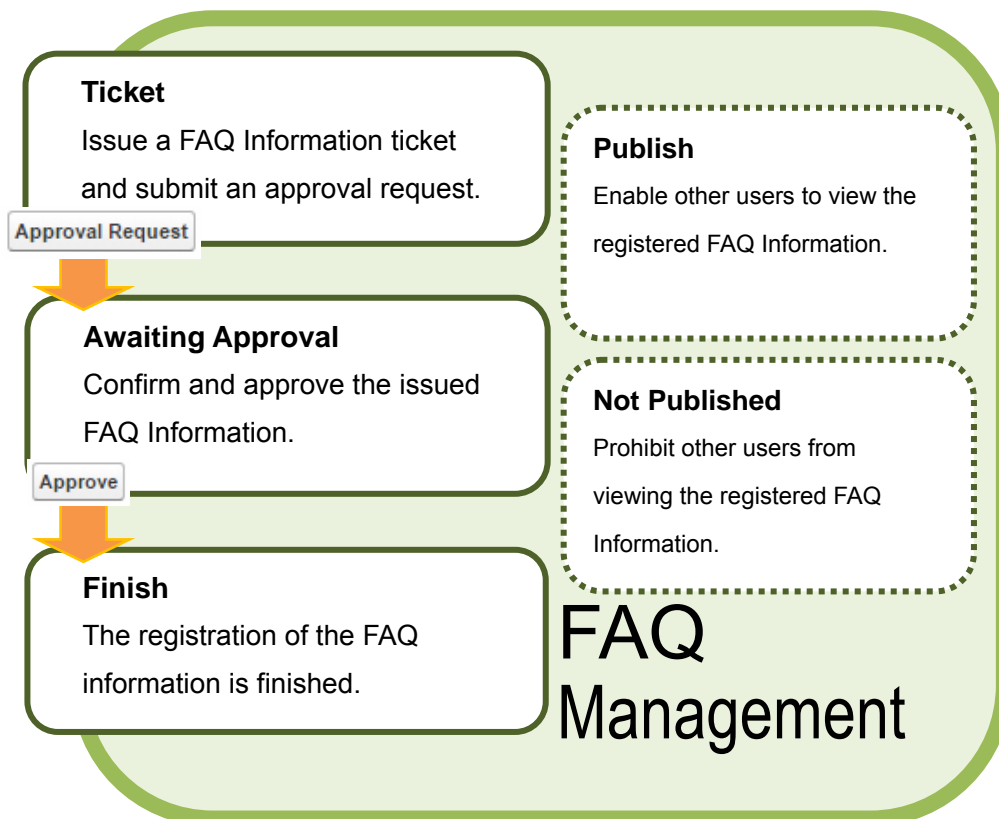


9. FAQ Management

FAQ Management is used to manage everything from the registration to publishing of FAQ information.

9.1 Workflow Description

The following explains the FAQ Management workflow.



9.2 Tickets

To add the FAQ information described above, issue a ticket for the management information.

1. Open the Create New screen.

Refer to the previous section "2.8 Creating, Editing and Deleting Records" for details on how to open the screen.

2. Enter the required items.

3. Click the [Save] button.

The entered content is updated in the FAQ Management detail screen.

Notification that the FAQ Information was registered is sent to the Owner's portal.

This completes the procedure to issue a ticket.

4. Click the [Approval Request] button.

Notification is sent to the portal of the Approver. Notification is sent to the portal when the Approver grants approval of the request. If the request is rejected, it returns to Not Approved status.

9.3 Approval and Rejection

Approve the registered FAQ information.

This operation is performed by the user who is set as the "Approver".

Confirm the approval request from the portal and open the FAQ Management detail screen.

Confirm the registered content.

◆ To approve

1. Click the [Approve] button.

The comment field is displayed.

2. Enter the comment.

The Approval Notification is sent to the Owner's portal.

3. The approval is finished when the Owner confirms the content.

◆ To reject

1. Click the [Reject] button.

The comment field is displayed.

2. Enter the comment and click the [OK] button.

The Rejection Notification is sent to the Owner's portal.

The Owner confirms the content and issues an Approval Request again after making corrections.

* The Approver can be changed. For more details, refer to section "Appendix.5 Change Approver".

* Approval or rejection comments can be entered automatically. Refer to the "LMIS on cloud コンフィグレーションガイド" for more information.

9.4 Publishing to Self Service Portal

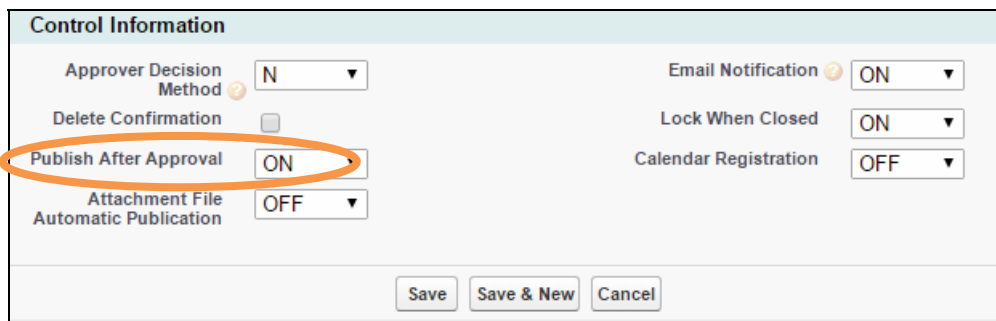
Approved FAQ information can be published into the Self Service Portal.

◆ Automatic Publishing After Approval

The FAQ information can be set to automatically publish after receiving approval.

The setting can be changed with the following procedure.

1. Open the detail screen for each record or the Create New screen.
2. Select [ON] from the [Publish After Approval] drop-down list under [Control Information].



The screenshot shows a form titled "Control Information" with several settings. The "Publish After Approval" dropdown menu is highlighted with an orange oval and is set to "ON". Other settings include "Approver Decision Method" (N), "Delete Confirmation" (checkbox), "Attachment File Automatic Publication" (OFF), "Email Notification" (ON), "Lock When Closed" (ON), and "Calendar Registration" (OFF). At the bottom, there are buttons for "Save", "Save & New", and "Cancel".

3. Click the [Save] button.

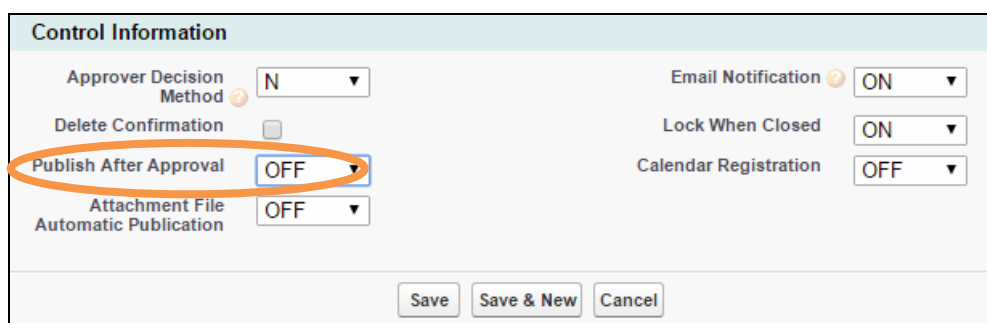
This completes the Publish After Approval setting.

◆ Manual Publishing After Approval

The FAQ information can be set to manually publish after receiving approval.

Use the following procedure to change this setting.

1. Open the detail screen for each record or the Create New screen.
2. Select [OFF] from the [Publish After Approval] drop-down list under [Control Information].



The screenshot shows the same "Control Information" form as above, but the "Publish After Approval" dropdown menu is highlighted with an orange oval and is set to "OFF". All other settings and buttons remain the same.

3. Click the [Save] button.

4. Click [Publish] on the record details screen.

The [Publish] check box under [Publish Information] will be selected on the detail screen.

5. Confirm that the information is published to finish the procedure.

◆ **Manual Unpublishing After Approval**

The FAQ information can be set to manually unpublish after receiving approval.

Use the following procedure to change this setting.

1. Click [Not Published] on the record details screen.

The check is removed from the [Publish] box under [Publish Information] on the detail screen.

2. Confirm that the information is not published to finish the procedure.

Note

- Enable [Attachment File Automatic Publication] to automatically publish attachment files to the Self Service Portal.

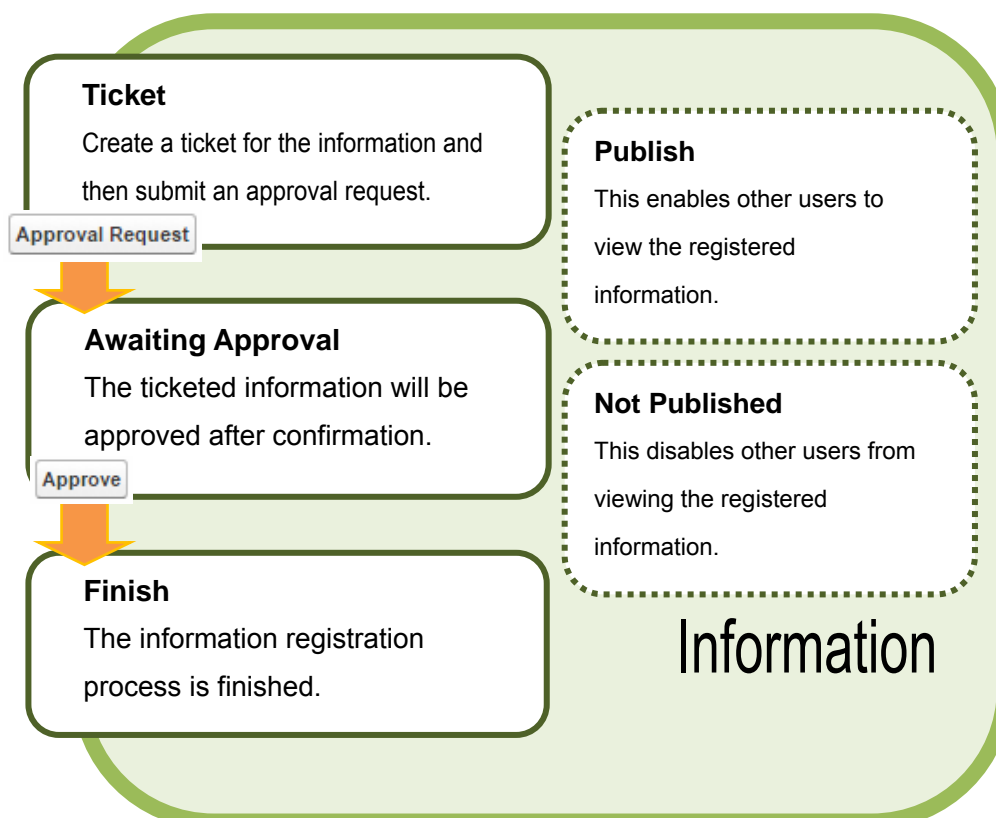
Refer to "Appendix.11 Managing Attachment Files" for information on managing attachment files.

10. Information

This chapter describes information management procedures from registration to publishing.

10.1 Workflow Description

The following figure describes the information workflow.



10.2 Tickets

To add information as previously described, issue a ticket of the management information.

1. Open the **Create New** screen.

Refer to the previous section "2.8 Creating, Editing and Deleting Records" for details on how to open the screen.

2. Enter the required items.

3. Click the **[Save]** button.

The entered content is updated in the information detail screen.

Notification that the information was registered is sent to the Owner's portal.

This completes the procedure to issue a ticket.

4. Click the **[Approval Request]** button.

Notification is sent to the portal of the Approver. Notification is sent to the portal when the

Approver grants approval of the request. If the request is rejected, it returns to Not Approved status.

10.3 Approval and Rejection

Registered information need to be approved.

This operation is performed by the user who is set as the "Approver".

Confirm the approval request from the portal and open the information detail screen.

Confirm the registered content.

◆ To approve

1. Click the [Approve] button.

The comment field is displayed.

2. Enter the comment.

The Approval Notification is sent to the Owner's portal.

3. The approval is finished when the Owner confirms the content.

◆ To reject

1. Click the [Reject] button.

The comment field is displayed.

2. Enter the comment and click the [OK] button.

The Rejection Notification is sent to the Owner's portal.

The Owner confirms the content and issues an Approval Request again after making corrections.

* The Approver can be changed. For more details, refer to section "Appendix.5 Change Approver".

* Approval or rejection comments can be entered automatically. Refer to the "LMIS on cloud コンフィグレーションガイド" for more information.

10.4 Publishing to Self Service Portal

Approved information can be published into the Self Service Portal.

◆ Automatic Publishing After Approval

The information can be set to automatically publish after receiving approval.

Use the following procedure to change this setting.

1. Open the detail screen for each record or the Create New screen.
2. Select [ON] from the [Publish After Approval] drop-down list under [Control Information].

The screenshot shows a 'Control Information' form with several settings. The 'Publish After Approval' dropdown menu is highlighted with an orange oval and is currently set to 'ON'. Other settings include 'Approver Decision Method' (N), 'Delete Confirmation' (checkbox), 'Attachment File Automatic Publication' (OFF), 'Email Notification' (ON), 'Lock When Closed' (ON), and 'Calendar Registration' (OFF). At the bottom, there are buttons for 'Save', 'Save & New', and 'Cancel'.

3. Click the [Save] button.

This completes the Publish After Approval setting.

◆ Manual Publishing After Approval

The information can be set to manually publish after receiving approval.

Use the following procedure to change this setting.

1. Open the detail screen for each record or the Create New screen.
2. Select [OFF] from the [Publish After Approval] drop-down list under [Control Information].

The screenshot shows the same 'Control Information' form as above, but the 'Publish After Approval' dropdown menu is highlighted with an orange oval and is now set to 'OFF'. All other settings and buttons remain the same.

3. Click the [Save] button.
4. Click [Publish] on the record details screen.

The [Publish] check box under [Publish Information] will be selected on the detail screen.

5. **Confirm that the information is published to finish the procedure.**

◆ **Manual Unpublishing After Approval**

The information can be set to manually unpublish after receiving approval.

Use the following procedure to change this setting.

1. **Click [Not Published] on the record details screen.**

The check is removed from the [Publish] box under [Publish Information] on the detail screen.

2. **Confirm that the information is not published to finish the procedure.**

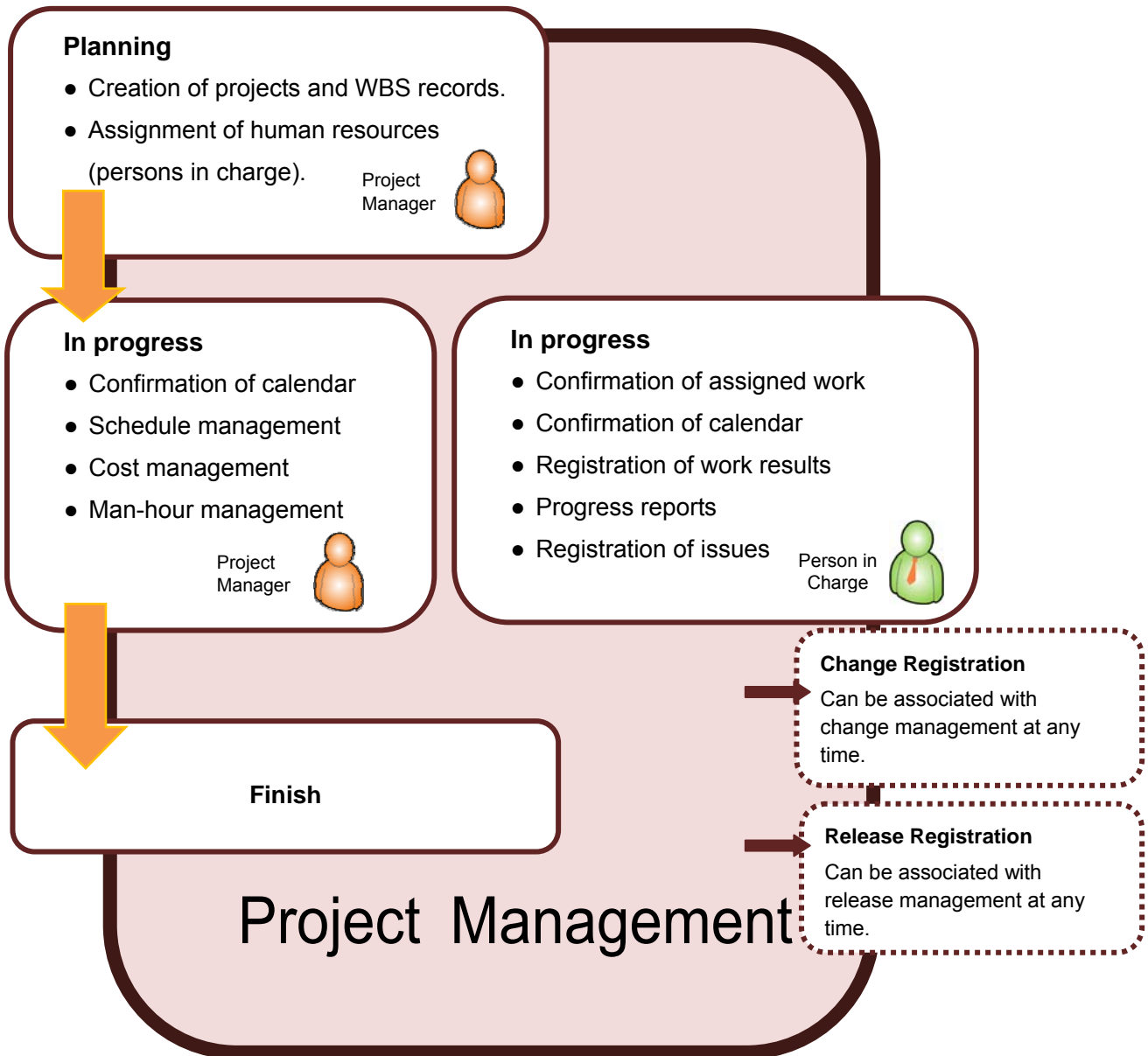
Note

- When [Post to Portal Site (Before Login)] is checked, users who are not logged in can access the information on the Self Service Portal home screen.
- Enable [Attachment File Automatic Publication] to automatically publish attachment files to the Self Service Portal.

Refer to "Appendix.11 Managing Attachment Files" for information on managing attachment files.

11. Project Management

Project management is the process of managing projects from planning to finishing stages. The following workflow diagram illustrates the corresponding management processes.



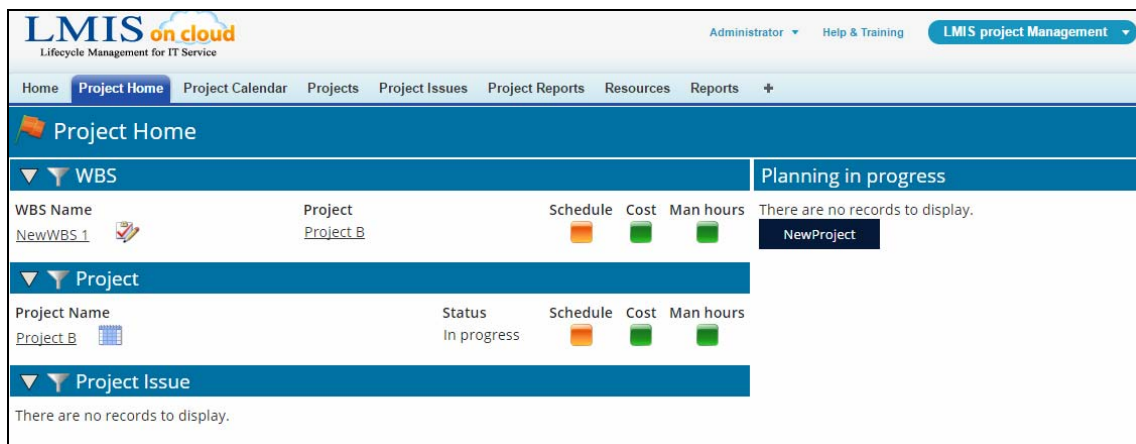
11.1 Screen Overview

This chapter provides an overview of the screens used for project management.

◆ Project Home Screen

The Project Home Screen displays projects you are managing, WBS records, and summary information of project issues.

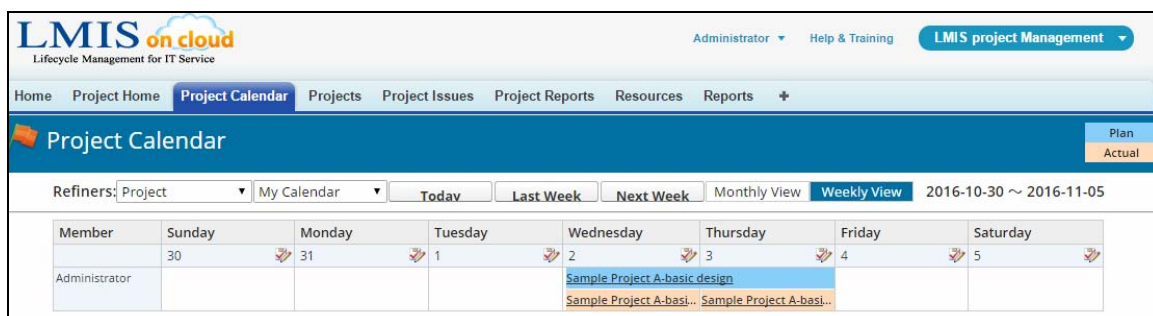
From this screen, you can create new projects, register work results, confirm project calendars, and other related operations.



◆ Project Calendar Screen

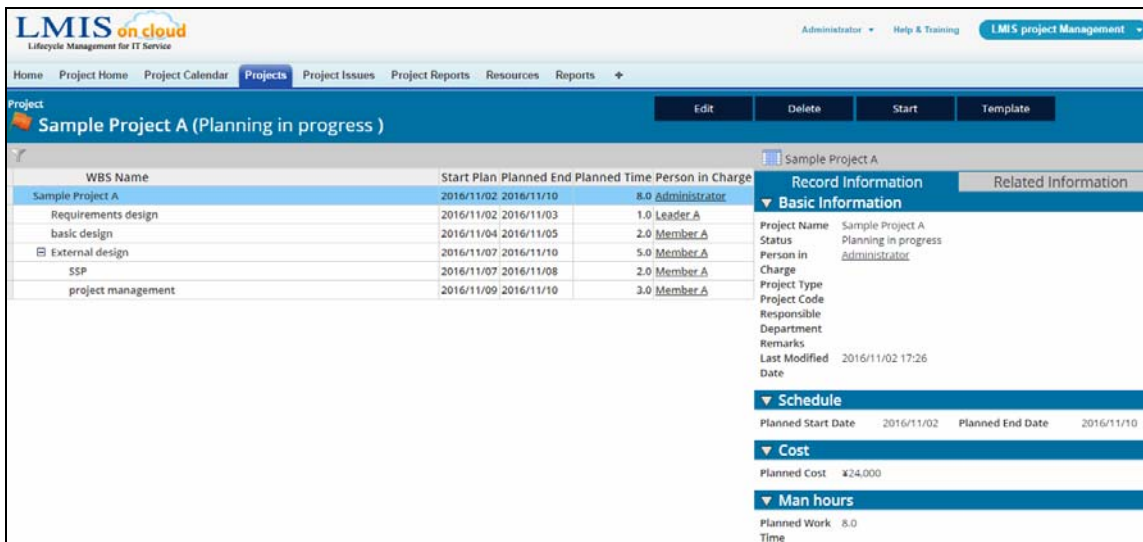
The Project Calendar screen is used to check the calendar for each project or each worker. Project work plans and work results appear on this calendar, and work results can be entered via this screen.

Refer to "Checking project calendars" in "11.4.1 Project Management" for more information on this functionality.



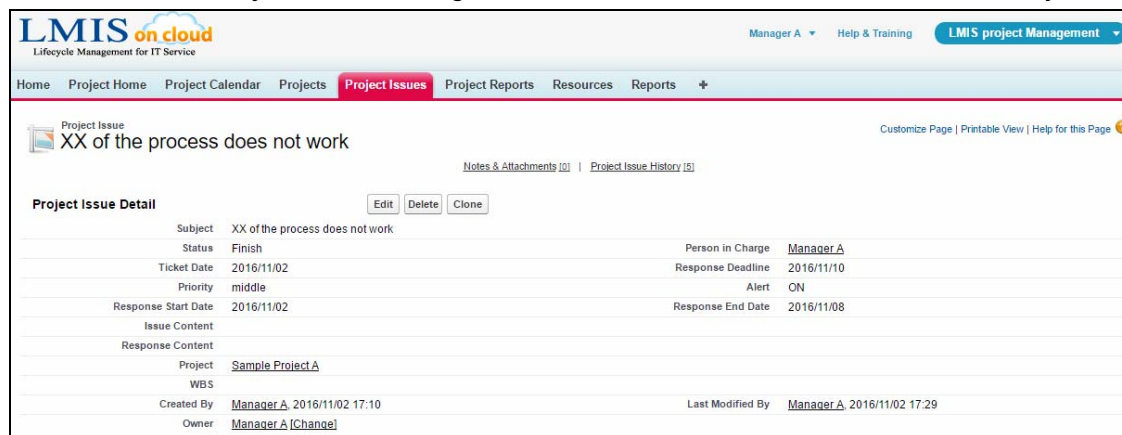
◆ **Project Screen**

The Project screen is used to register projects and WBS records, assign persons in charge, and manage projects. Users with the appropriate privileges can create project templates. Refer to "11.3 Project Planning" and subsequent chapters for more information on this functionality.



◆ **Project Issue Screen**

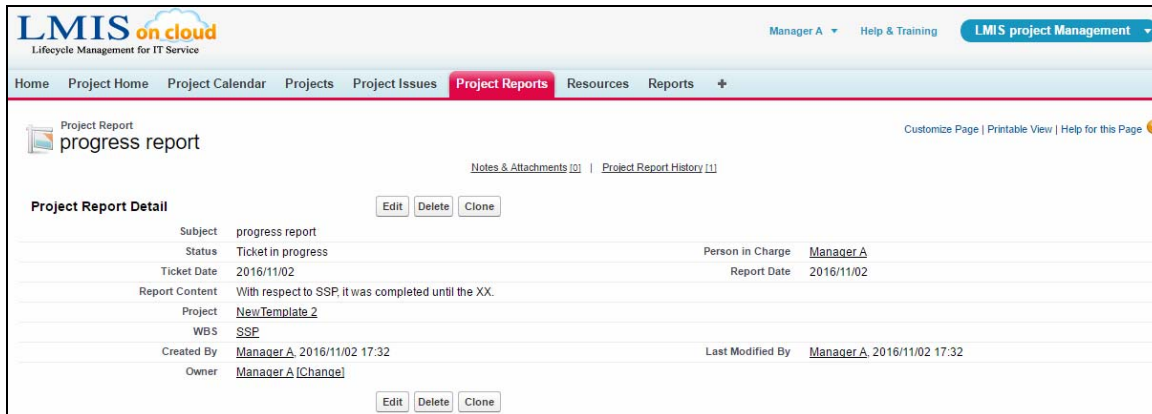
The Project Issue screen is used to manage project issues. You can set response deadlines for issue and have alerts sent when a response deadline passes. Refer to "11.4.4 Project Issue Management" for more information on this functionality.



◆ **Project Report Screen**

The Project Report screen is used to create project reports.

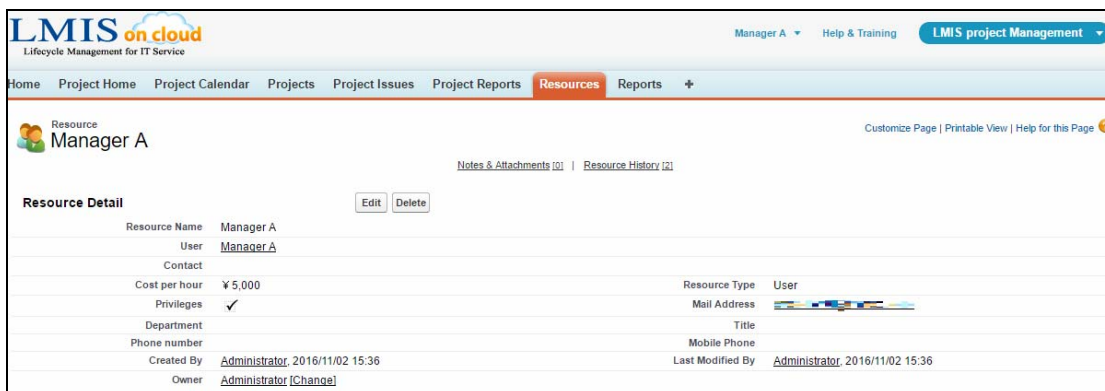
Refer to "11.4.3 Project Progress Reports" for more information on this functionality.



◆ **Resources Screen**

The Resources screen is used to assign project members for each work.

Refer to "11.2 Project Resources" for more information on this functionality.



11.2 Project Resources

Project members for each work (users or other contacts) are assigned as project resources.

This chapter describes the procedures to register, edit, and delete resources using the project management functionality.

Methods of resource registration include automatic registration, manual registration, and batch registration. Refer to "システム管理者ガイド 1.2.13 プロジェクトのリソースのメンテナンス" for more information on batch registration.

◆ Automatic Registration of Resources

When a user with the privileges to create resources uses the project management functionality, resources will be automatically created if the user resource does not exist.

1. The user for which resources have not yet been created logs into the system and selects the [LMIS Project Management] application.

The Project Home screen will appear.

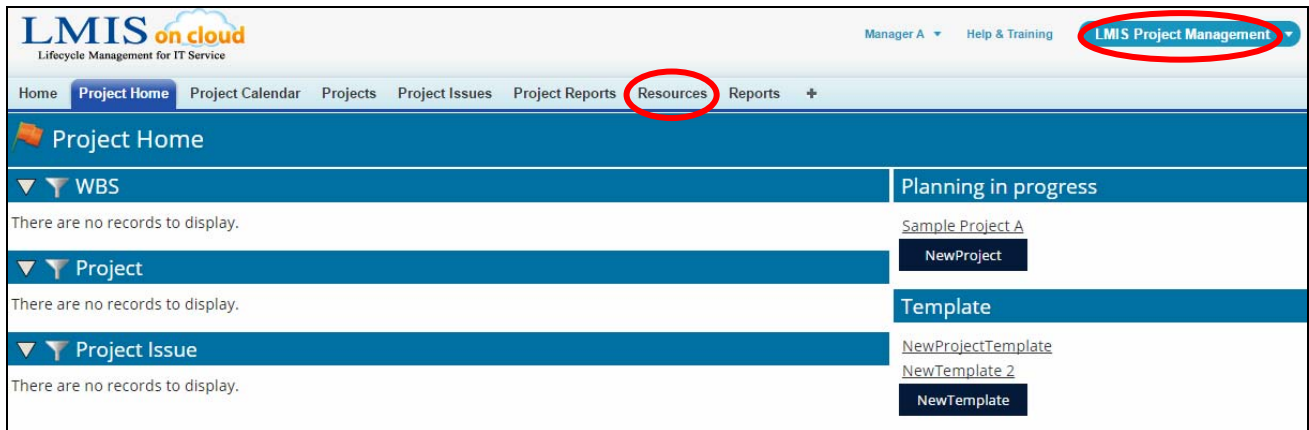
2. Click the [Resources] tab and confirm that the user resources were created.

Action	Resource Name ↑	Privileges	Resource Type	Cost per hour	Department	Title
<input type="checkbox"/> Edit Del	Administrator	✓	User	¥ 3,000		
<input type="checkbox"/> Edit Del	Leader A	✓	Contact	¥ 3,000		
<input type="checkbox"/> Edit Del	Manager A	✓	User	¥ 5,000		
<input type="checkbox"/> Edit Del	Member A	✓	Contact	¥ 3,000		

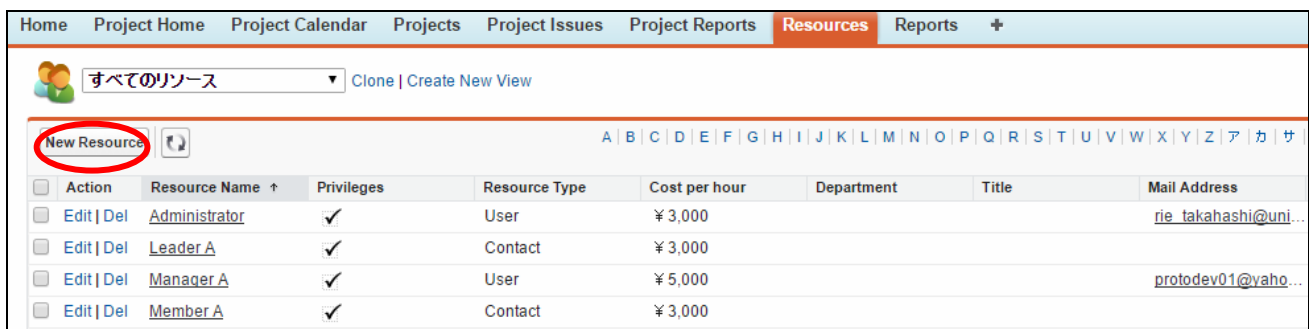
◆ **Manual Registration of Resources**

This section describes the procedure to manually register resources.

1. Select [LMIS Project Management] from the application menu and then click the [Resources] tab.



2. Click the [New Resource] button.



3. The "Edit Resources" screen appears. Configure the required fields and then click the [Save] button.

The screenshot shows the 'Resource Edit' interface. At the top, there's a 'Resource Edit' header with a 'New Resource' title and a 'Help for this Page' link. Below the header, there are three buttons: 'Save', 'Save & New', and 'Cancel'. The 'Save' button is circled in red. The main form is divided into two sections: 'Basic Information' and 'System Information'. The 'Basic Information' section contains fields for 'Resource Name' (with a red asterisk), 'User', 'Contact', 'Cost per hour' (with a red asterisk), 'Resource Type' (a dropdown menu), and 'Privileges' (a checkbox). The 'System Information' section shows 'Owner' as 'Administrator'. At the bottom of the form, there are three buttons: 'Save', 'Save & New', and 'Cancel'.

The following table lists each field on the resource edit screen along with a brief description.

Field Name	Description
Resource Name	Name of the resource as used by the project management functionality. This is automatically set when the user name or contact name is saved. To change the resource name, the resource must be first saved.
User	The resource (user) is specified via a lookup process.
Contact	The resource (contact) is specified via a lookup process.
Cost per hour	Specifies the cost per hour of the resource.
Resource Type	The resource type (user or contact) is automatically set when the resource is saved.
Privileges	Users for which this check box is selected (users with special permissions) can create and edit project templates and edit all projects.

Caution

- If a resource is saved having accidentally entered both a user and a contact, the information for the user has priority and is set first. To finalize the registration, confirm that any unnecessary association has been deleted and then save the resource.

◆ Editing Resources

This section describes the procedure to edit resources.

1. Click on the desired resource record.

The resource detail screen appears.

Resource
Manager A

Customize Page | Edit Layout | Printable View | Help for this Page ?

< Back to List: Users

Notes & Attachments [0] | Resource History [2]

Resource Detail Edit Delete

Resource Name	Manager A		
User	Manager A		
Contact			
Cost per hour	¥ 5,000	Resource Type	User
Privileges	<input checked="" type="checkbox"/>	Mail Address	
Department		Title	
Phone number		Mobile Phone	
Created By	Administrator, 2016/11/02 15:36	Last Modified By	Administrator, 2016/11/02 15:36
Owner	Administrator [Change]		

2. Click the [Edit] button. The edit screen appears.

Resource Edit
Manager A

Help for this Page ?

Resource Edit Save Save & New Cancel

Basic Information | = Required Information

Resource Name	Manager A		
User	Manager A		
Contact			
Cost per hour	5,000	Resource Type	User
Privileges	<input checked="" type="checkbox"/>		
System Information	Owner Administrator		

Save Save & New Cancel

3. After making the desired edits, click the [Save] button to save the changes.

Note

- The following changes can be made for users and contacts. The resource name is automatically set to the new user or contact after changes have been made.
 - Changing from a user to another user
 - Changing from a user to a contact
 - Changing from a contact to a user
 - Changing from a contact to another contact

◆ Deleting Resources

This section describes the procedure to delete resources.

1. Click on the desired resource record.

The resource detail screen appears.

Resource
Manager A

Customize Page | Edit Layout | Printable View | Help for this Page

< Back to List: Users

Notes & Attachments [0] | Resource History [2]

Resource Detail Edit Delete

Resource Name	Manager A		
User	Manager A		
Contact			
Cost per hour	¥ 5,000	Resource Type	User
Privileges	<input checked="" type="checkbox"/>	Mail Address	[Redacted]
Department		Title	
Phone number		Mobile Phone	
Created By	Administrator , 2016/11/02 15:36	Last Modified By	Administrator , 2016/11/02 15:36
Owner	Administrator [Change]		

2. Click the [Delete] button. Once the Delete Confirmation pop-up appears, click [OK].

Caution

- The following resources cannot be deleted for purposes of retaining project results.
 - Project Manager
 - WBS Manager
 - WBS Work Manager
 - Project Issue Manager
 - Project Reporting Manager
 - Project Member

11.3 Project Planning

This section covers the project planning phase.

During the project planning phase, projects and WBS records are registered and work is assigned.

11.3.1 Project Registration

This section describes the procedure to register projects.

1. Select the [LMIS Project Management] application and then click the [NewProject] button.

The screenshot shows the LMIS on cloud interface. The top navigation bar includes 'Administrator', 'Help & Training', and 'LMIS Project Management' (circled in orange). Below this is a secondary navigation bar with 'Home', 'Project Home', 'Project Calendar', 'Projects', 'Project Issues', 'Project Reports', 'Resources', and 'Reports'. The main content area is titled 'Project Home' and contains three sections: 'WBS', 'Project', and 'Project Issue'. Each section has a 'NewProject' button circled in orange. The 'Template' section has a 'NewTemplate' button.

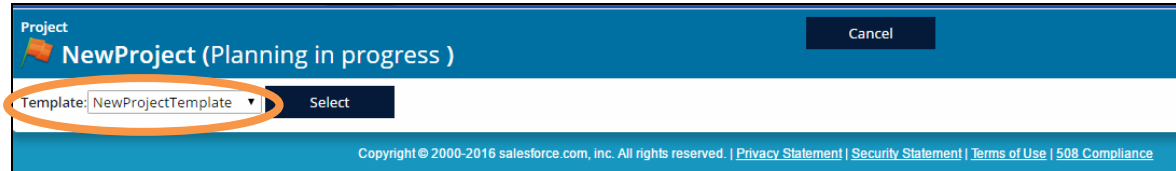
Note

- You can also create a new project by clicking the [Project] tab and then clicking the [NewProject] button.

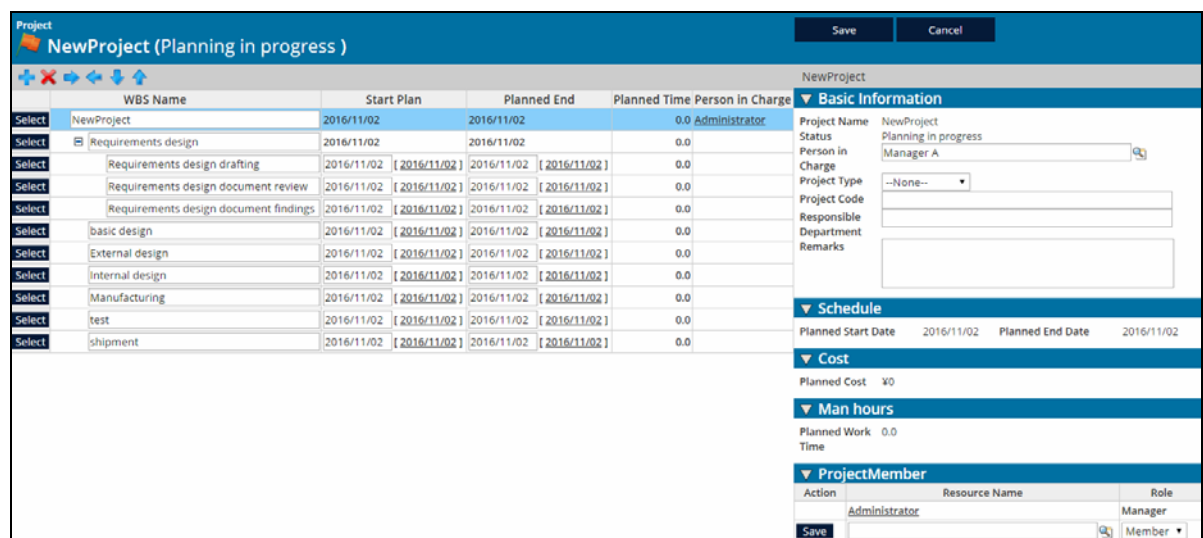
2. Once the new project planning screen appears, select [Template] and then click the [Select] button.

* Refer to "11.5 Project Templates" for more information on project templates.

* Select [Do not use a template] if you do not want to use a project template.

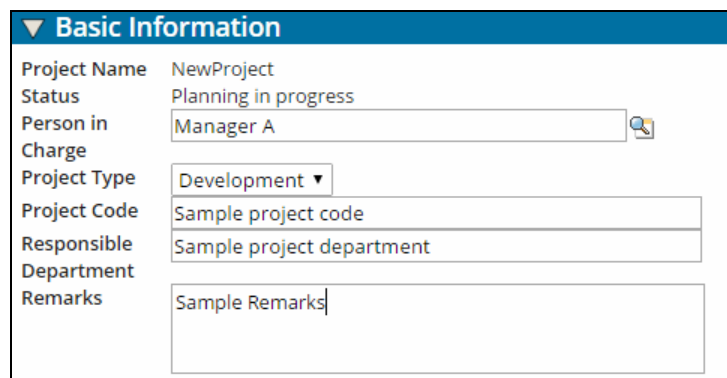


The new project edit screen appears.



3. Enter the required information into the [Basic Information] section.

Enter the required information.



The following table describes each entry field in this section.

Field Name	Description
Person in Charge	Select the project manager (resource) via a lookup process.
Project Type	Select the project type.
Project Code	Enter the project code.
Responsible Department	Enter the responsible department for the project.
Remarks	Enter remarks.

4. Enter information into the [Project Member] section.

Select the project member resource via resource name lookup and the role in the [Role] pull-down menu, and then click the [Save] button under Action.

▼ ProjectMember		
Action	Resource Name	Role
	Manager A	Manager
Save	Member A	Member ▼

The following table lists the different privileges assigned to the available project member roles.

Role	Project		WBS	WBS Work
	Create and edit	Delete	Create, edit, and delete	Work results registration
Manager	Yes	Yes	Yes	Yes
Leader	Yes	No	Yes	Yes
Member	No	No	No	Yes
Advisor	No	No	No	Yes
User	No	No	No	Yes

* Users assigned as WBS managers can delete WBS work results regardless of their assigned role here.

5. Register the [WBS] and then click the [Save] button.

Refer to “11.3.2 WBS Registration” for information on registering WBS records.

11.3.2 WBS Registration

This section describes the procedure to register WBS records into created projects.

The following figure illustrates the WBS input screen.

	WBS Name	Start Plan	Planned End	Planned Time	Person in Charge
Select	NewProject	2016/11/02			
Select	Requirements design	2016/11/02			
Select	basic design	2016/11/02			
Select	External design	2016/11/02	2016/11/02	0.0	
Select	SSP	2016/11/02			
Select	project management	2016/11/02			

Project
Detailed project information appears when selected. Project members can be assigned here.

Summary WBS
This WBS record contains subordinate WBS records. Detailed summary WBS information for subordinate WBS

Normal WBS
WBS records with no subordinate WBS records. Detailed WBS information appears when selected. Work can be assigned here.

The following table describes the fields on the WBS input screen.

Field Name	Description
WBS Name	Enter the WBS name.
Start Plan	Enter the Planned Start Date of the WBS.
Planned End	Enter the Planned End Date of the WBS.

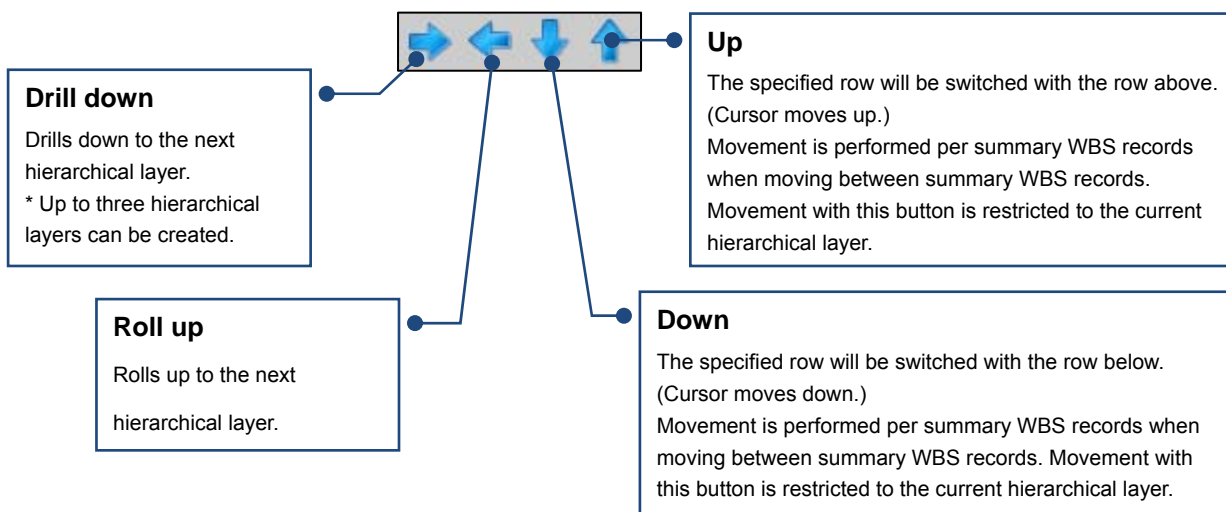
The following section describes the buttons used to add and delete WBS records.

* Click the [Select] button to select rows.

Add
Adds a WBS record under the specified row.

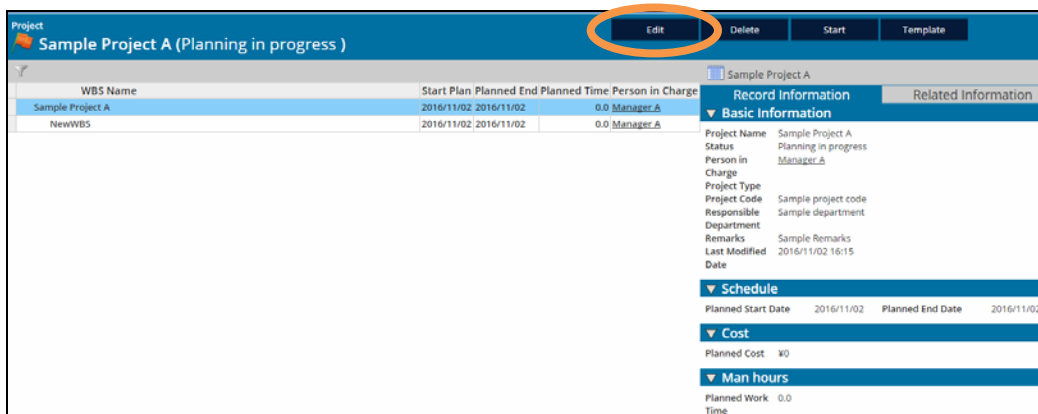
Delete
Deletes the specified row. All subordinate WBS records will also be deleted when deleting a summary WBS record.

This section describes the buttons used to move between WBS records and to move layers up or down.



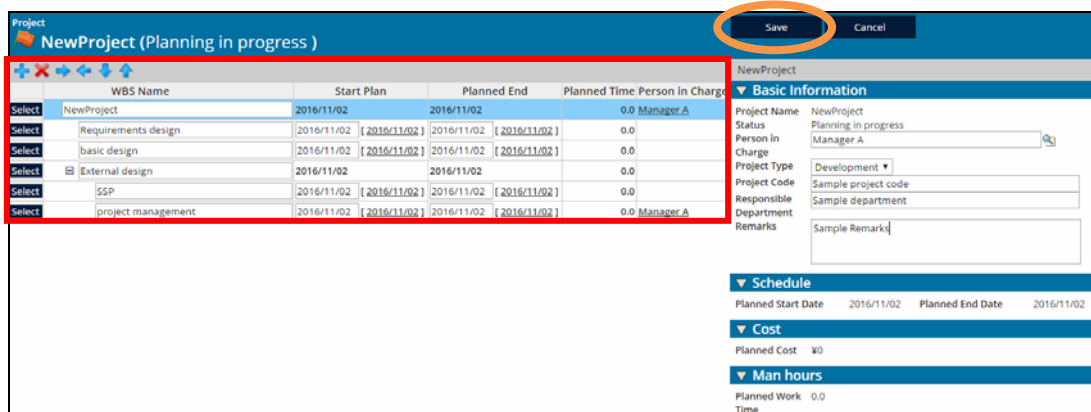
1. From the project reference screen, click the [Edit] button.

The project edit screen (WBS registration screen) appears.



2. Add a WBS record, enter the required information such as WBS name, Start Plan, and Planned End, and then click the [Save] button.

* Refer to "11.3.3 Assigning Work" for more information on assigning work.



11.3.3 Assigning Work

This section describes the procedures to assign resources to WBS records and to enter the number of planned man hours.

1. From the project edit screen, click the [Select] button for the desired WBS record. The selected row is highlighted.

	WBS Name	Start Plan	Planned End	Planned Time	Person in Charge
Select	NewProject	2016/11/02	2016/11/02	0.0	Manager A
Select	Requirements design	2016/11/02 [2016/11/02]	2016/11/02 [2016/11/02]	0.0	
Select	basic design	2016/11/02 [2016/11/02]	2016/11/02 [2016/11/02]	0.0	
Select	External design	2016/11/02	2016/11/02	0.0	
Select	SSP	2016/11/02 [2016/11/02]	2016/11/02 [2016/11/02]	0.0	
Select	project management	2016/11/02 [2016/11/02]	2016/11/02 [2016/11/02]	0.0	Manager A

2. Information related to the selected WBS record appears on the right side of the screen. Enter information into the [Basic Information] section for the corresponding WBS record as necessary.

Basic Information

WBS Name: Requirements design

Status: Planning in progress

Person in Charge: Leader A

Remarks:

The following table describes each entry field in this section.

Field Name	Description
Person in Charge	Select the main WBS manager (resource) via a lookup process. * The person in charge field on the left side of the screen is set when the information is saved.
Remarks	Enter remarks.

3. Enter information into the [Person in Charge] section as necessary.

Select the person in charge resource via resource name lookup, enter the number of planned man hours into the Work Time field, and then click the [Save] button under Action.

▼ Person in Charge		
Action	Person in Charge	Work Time
Save	Leader A ▼	1.0

The person in charge row will be added once this information is saved.

To continue assigning persons in charge, enter the information into each added person in charge row and save the information.

▼ Person in Charge		
Action	Person in Charge	Work Time
Delete	Leader A	1.0
Save	Member A ▼	1.0

The following table describes each entry field in this section.

Field Name	Description
Person in Charge	Select the WBS manager (resource) from a list. * The list contains all project members. * Multiple persons in charge can be added.
Work Time	Enter the work time (planned man hours) in units of hours for each person in charge.

Once all persons in charge have been assigned, values for fields in the [Schedule], [Cost], and [Man Hours] sections will be automatically calculated.

* Ex.: The unit cost of work of the Leader A resource is set to 3,000 yen per hour in the following figure.

▼ Schedule			
Planned Start Date	2016/11/02	Planned End Date	2016/11/02
▼ Cost			
Planned Cost	¥3,000		
▼ Man hours			
Planned Work Time	1.0		

The following table describes these section fields.

Schedule	
Planned Start Date	The Planned Start Date specified in the WBS record is automatically set.
Planned End Date	The Planned End Date specified in the WBS record is automatically set.
Cost	
Planned Cost	The planned cost is automatically set. Calculation formula: Unit cost of work of resource at the time of planning X Planned work time
Person in Charge	
Planned Work Time	The planned work time is automatically set.

Note

- To delete a registered person in charge, click the [Delete] button under Action.

Person in Charge		
Action	Person in Charge	Work Time
Delete	Leader A	1.0
Delete	Member A	2.0
Save	Manager A	0.0

- Repeat steps 1 through 3 to assign all persons in charge and work times to all WBS records. Click the [Save] button.

The screenshot shows the 'NewProject (Planning in progress)' interface. At the top right, the 'Save' button is circled in orange. Below it is a table with columns: WBS Name, Start Plan, Planned End, Planned Time, and Person in Charge. The table lists several WBS items like 'Requirements design', 'basic design', 'External design', 'SSP', and 'project management'. To the right of the table is a 'Basic Information' panel with fields for Project Name, Status, Person in Charge, Project Type, Project Code, Responsible Department, and Remarks.

The project will be saved and the reference screen will appear.

This completes the project planning procedure.

The screenshot displays a project management application interface. At the top, there is a header bar with the project name 'NewProject (Planning in progress)' and buttons for 'Edit', 'Delete', 'Start', and 'Template'. Below the header is a table listing Work Breakdown Structure (WBS) items. To the right of the table is a sidebar containing project details under 'Record Information' and 'Basic Information'. At the bottom right, there are summary sections for 'Schedule', 'Cost', and 'Man hours'.

WBS Name	Start Plan	Planned End	Planned Time	Person in Charge
NewProject	2016/11/02	2016/11/02	8.0	Manager A
Requirements design	2016/11/02	2016/11/02	1.0	Leader A
basic design	2016/11/02	2016/11/02	2.0	Member A
External design	2016/11/02	2016/11/02	5.0	Member A
SSP	2016/11/02	2016/11/02	2.0	Member A
project management	2016/11/02	2016/11/02	3.0	Manager A

Record Information

Basic Information

- Project Name: NewProject
- Status: Planning in progress
- Person in Charge: Manager A
- Charge:
- Project Type:
- Project Code: Sample project code
- Responsible: Sample department
- Department:
- Remarks: Sample Remarks
- Last Modified Date: 2016/11/02 16:30

Schedule

Planned Start Date	2016/11/02	Planned End Date	2016/11/02
--------------------	------------	------------------	------------

Cost

Planned Cost: ¥23,000

Man hours

Planned Work Time: 8.0

11.4 Project Management

This section describes project progress state changes (Planning in progress, In progress, and Finish), the procedure to register work results, and methods of managing progress, cost, and man hours.

11.4.1 Project Management

This section describes how to proceed with and manage project.

Typically, project managers or leaders start, plan, finish, and manage projects.

The following bullet points describe the main differences in project states.

- Planning in progress: Tentative schedules and deadlines can be viewed on the Project Calendar.
- In progress: Your projects and WBS records appear on the Project Home Screen.
- Finish: Work results can no longer be edited.

◆ Starting projects (Planning in progress to In progress)

Once a project is in the active state, your projects and WBS records appear on the Project Home Screen.

1. From the project reference screen, click the [Start] button.

The screenshot displays the 'NewProject (Planning in progress)' interface. At the top, there are buttons for 'Edit', 'Delete', 'Start', and 'Template'. The 'Start' button is circled in orange. Below the buttons is a table with the following data:

WBS Name	Start	Plan	Planned	End	Planned Time	Person in Charge
NewProject	2016/11/02	2016/11/02	2016/11/02	2016/11/02	8.0	Manager A
Requirements design	2016/11/02	2016/11/02	2016/11/02	2016/11/02	1.0	Leader A
basic design	2016/11/02	2016/11/02	2016/11/02	2016/11/02	2.0	Member A
External design	2016/11/02	2016/11/02	2016/11/02	2016/11/02	5.0	Member A
SSP	2016/11/02	2016/11/02	2016/11/02	2016/11/02	2.0	Member A
project management	2016/11/02	2016/11/02	2016/11/02	2016/11/02	3.0	Manager A

On the right side, the 'Record Information' panel is expanded to show 'Basic Information':

- Project Name: NewProject
- Status: Planning in progress
- Person in Charge: Manager A
- Project Type: Project Code: Sample project code, Responsible: Sample department, Department: Sample Remarks, Remarks: Sample Remarks, Last Modified: 2016/11/02 16:30, Date:

Below this, the 'Schedule' section shows: Planned Start Date: 2016/11/02, Planned End Date: 2016/11/02.

The 'Cost' section shows: Planned Cost: ¥23,000.

The 'Man hours' section shows: Planned Work Time: 8.0.

The status changes from "Planning in progress" to "In progress".

The screenshot shows a project management interface. At the top, the project name 'NewProject (In progress)' is displayed in a blue header bar, with the status '(In progress)' circled in orange. Below the header is a table of Work Breakdown Structure (WBS) items. To the right of the table is a 'Record Information' panel with several expandable sections: 'Basic Information', 'Schedule', 'Cost', and 'Man hours'. The 'Basic Information' section is expanded, and the 'Status' field is circled in orange, showing the value 'In progress'.

WBS Name	Completion Rate	Start Plan	Planned End	Planned Time	Actual Start	Actual End	Actual Time	Person in Charge
NewProject	0%	2016/11/02	2016/11/02	8.0				0.0 Manager A
Requirements design	0%	2016/11/02	2016/11/02	1.0				0.0 Leader A
basic design	0%	2016/11/02	2016/11/02	2.0				0.0 Member A
External design	0%	2016/11/02	2016/11/02	5.0				0.0 Member A
SSP	0%	2016/11/02	2016/11/02	2.0				0.0 Member A
project management	0%	2016/11/02	2016/11/02	3.0				0.0 Manager A

Record Information

Basic Information

- Project Name: NewProject
- Status: In progress
- Person in Charge: Manager A
- Charge:
- Project Type:
- Project Code: Sample project code
- Responsible: Sample department
- Department:
- Remarks: Sample Remarks
- Last Modified: 2016/11/02 16:34
- Date:

Schedule

- Planned Start Date: 2016/11/02
- Actual Start Date:
- Start Day Variance: 0
- Planned End Date: 2016/11/02
- Estimated End Date:
- End Date Delay Risk:
- Completion Rate: 0%
- Expected Completion Ratio: 0%

Cost

- Planned Cost: ¥23,000
- Actual Cost: ¥0
- Cost Variance: -¥23,000
- Estimated Actual Cost: ¥0
- Cost Overrun Risk:
- Completion Cost: ¥0
- Expected Completion Cost: ¥0

Man hours

- Planned Work Time: 8.0
- Actual Work Time: 0.0
- Work Time Variance: -8.0
- Estimated Work Time: 0.0
- Work Time Over-Budget Risk:

Note

- To delete a project, click the [Delete] button.

◆ Resetting the project state back to planning (In progress to Planning in progress)

1. From the project reference screen, click the [Plan] button.

Project NewProject (In progress)

Edit Delete **Plan** Expected Update Template

WBS Name	Completion Rate	Start Plan	Planned End	Planned Time	Actual Start	Actual End	Actual Time	Person in Charge
NewProject	0%	2016/11/02	2016/11/02	8.0				0.0 Manager A
Requirements design	0%	2016/11/02	2016/11/02	1.0				0.0 Leader A
basic design	0%	2016/11/02	2016/11/02	2.0				0.0 Member A
External design	0%	2016/11/02	2016/11/02	5.0				0.0 Member A
SSP	0%	2016/11/02	2016/11/02	2.0				0.0 Member A
project management	0%	2016/11/02	2016/11/02	3.0				0.0 Manager A

Record Information Related Information

Basic Information

Project Name: NewProject
 Status: In progress
 Person in Charge: Manager A
 Charge:
 Project Type:
 Project Code: Sample project code
 Responsible: Sample department
 Department:
 Remarks: Sample Remarks
 Last Modified: 2016/11/02 16:34
 Date:
Schedule
 Planned Start Date: 2016/11/02 Actual Start Date:
 Start Day Variance: 0
 Planned End Date: 2016/11/02 Estimated End Date:
 End Date Delay Risk:
 Completion Rate: 0% Expected Completion Ratio: 0%
Cost
 Planned Cost: ¥23,000 Actual Cost: ¥0
 Cost Variance: -¥23,000
 Estimated Actual Cost: ¥0 Cost Overrun Risk:
 Completion Cost: ¥0 Expected Completion Cost:
 Cost:

The status changes from "In progress" to "Planning in progress".

Project NewProject (Planning in progress)

Edit Delete **Start** Template

WBS Name	Start Plan	Planned End	Planned Time	Person in Charge
NewProject	2016/11/02	2016/11/02	8.0	Manager A
Requirements design	2016/11/02	2016/11/02	1.0	Leader A
basic design	2016/11/02	2016/11/02	2.0	Member A
External design	2016/11/02	2016/11/02	5.0	Member A
SSP	2016/11/02	2016/11/02	2.0	Member A
project management	2016/11/02	2016/11/02	3.0	Manager A

Record Information Related Information

Basic Information

Project Name: NewProject
 Status: Planning in progress
 Person in Charge: Manager A
 Charge:
 Project Type:
 Project Code: Sample project code
 Responsible: Sample department
 Department:
 Remarks: Sample Remarks
 Last Modified: 2016/11/02 16:36
 Date:
Schedule
 Planned Start Date: 2016/11/02 Planned End Date: 2016/11/02
Cost
 Planned Cost: ¥23,000
Man hours
 Planned Work Time: 8.0

◆ **Finishing projects (In progress to Finish)**

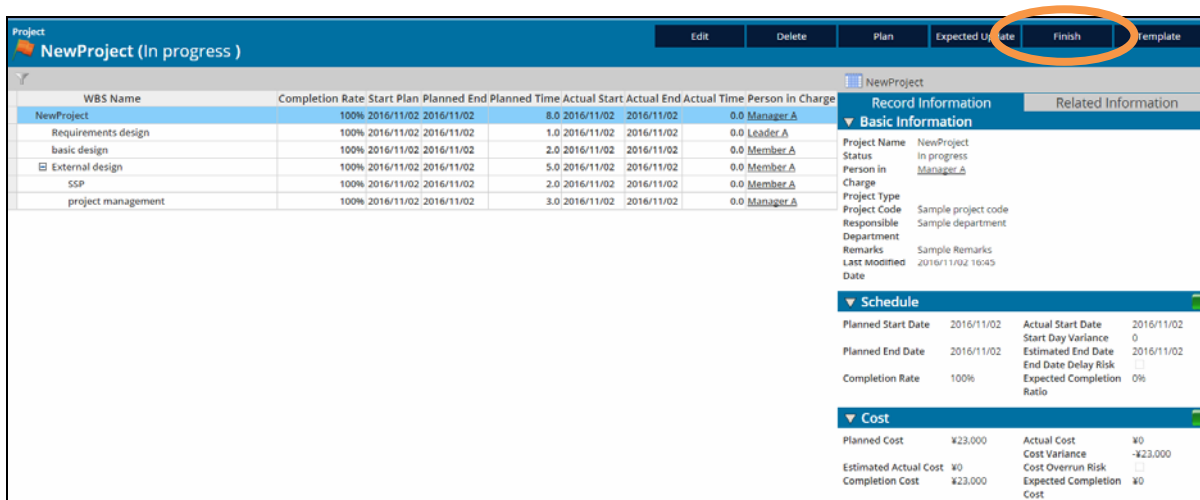
The project completion rate reaches 100 % once all WBS work is finished and work results are all at 100 %.

At this time, projects can now be finished.

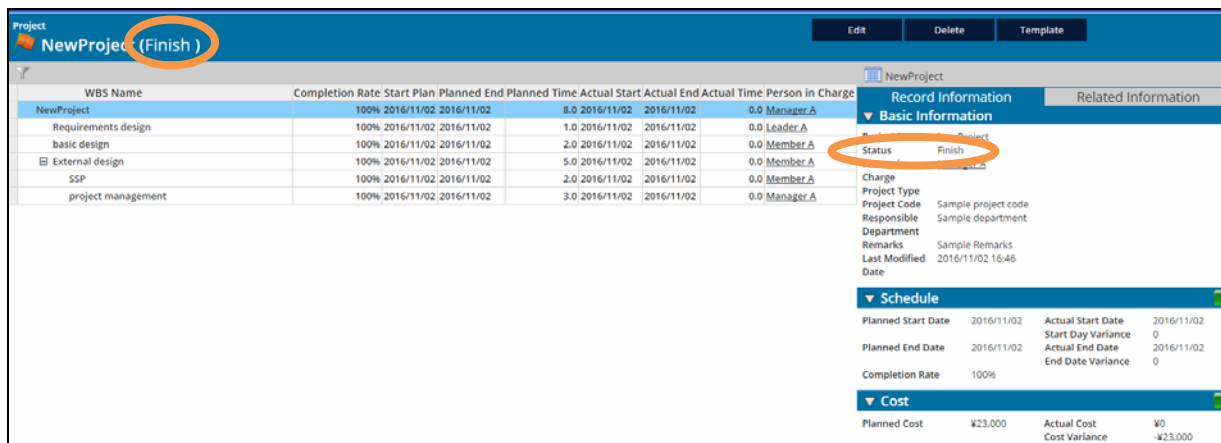
Once set to the finish state, work results can no longer be edited.

* Refer to "11.4.2 Work Results Registration" for more information on entering work results.

1. From the project reference screen, click the [Finish] button.



The project is finished once the status changes from "In progress" to "Finish".



◆ **Filtering the records to display**

The display of project, WBS, and other related records can be filtered.

1. **From the Project Home screen, click the filter icon next to the WBS, Project, and Project Issue categories.**

The screenshot shows the 'Project Home' interface. It features three main sections, each with a filter icon (a funnel) circled in orange:

- WBS Section:** A table with columns: WBS Name, Project, Schedule, Cost, and Man hours.

WBS Name	Project	Schedule	Cost	Man hours
project management	Sample Project A	■	■	■
basic design	Sample Project A	■	■	■
SSP	Sample Project A	■	■	■
Test	LMIS V3.0.0	■	■	■
- Project Section:** A table with columns: Project Name, Status, Schedule, Cost, and Man hours.

Project Name	Status	Schedule	Cost	Man hours
Sample Project A	In progress	■	■	■
LMIS V3.0.0	In progress	■	■	■
- Project Issue Section:** A table with columns: Subject, Project, Status, and Schedule.

Subject	Project	Status	Schedule
XX of the process does not work	Sample Project A	Ticket in progress	■

2. **Once the filter criteria screen appears, set the desired criteria and then click the [Update] button.**

The screenshot shows the 'WBS' filter criteria screen. It includes three filter options, each with an 'ON' and 'OFF' toggle:

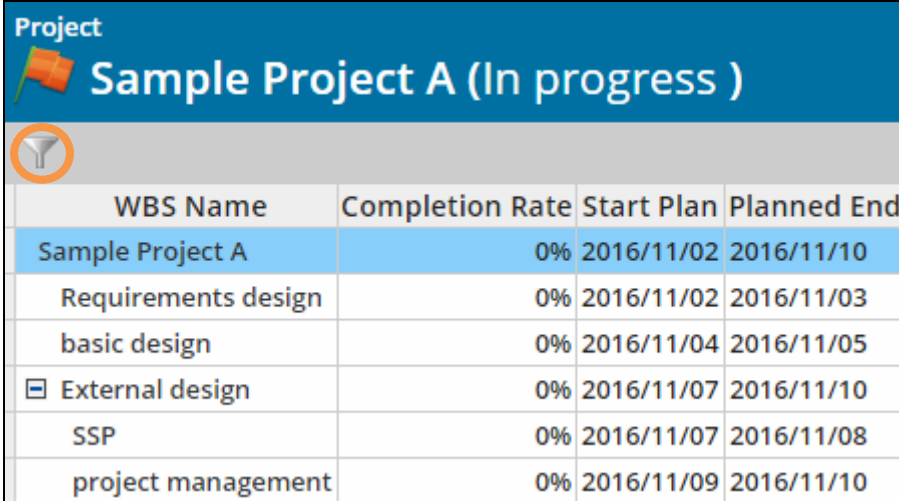
- Only records for which you are the responsible party will appear. ON OFF
- Only unfinished records appear ON OFF
- Display only warning and abnormal records ON OFF


At the bottom, there are two buttons: 'Update' (circled in orange) and 'Cancel'.

Refiners	Description
Only records for which you are the responsible party will appear.	ON: Only records for which you are the person in charge will appear. OFF: All other records will appear. * The default setting is ON.
Only unfinished records appear	ON: Only unfinished records appear. OFF: All other records will appear. * The default setting is ON.
Display only warning and abnormal records	ON: Display only warning and error records OFF: All other records will appear. * The default setting is OFF.

Note

- Records can also be filtered from the project reference screen.

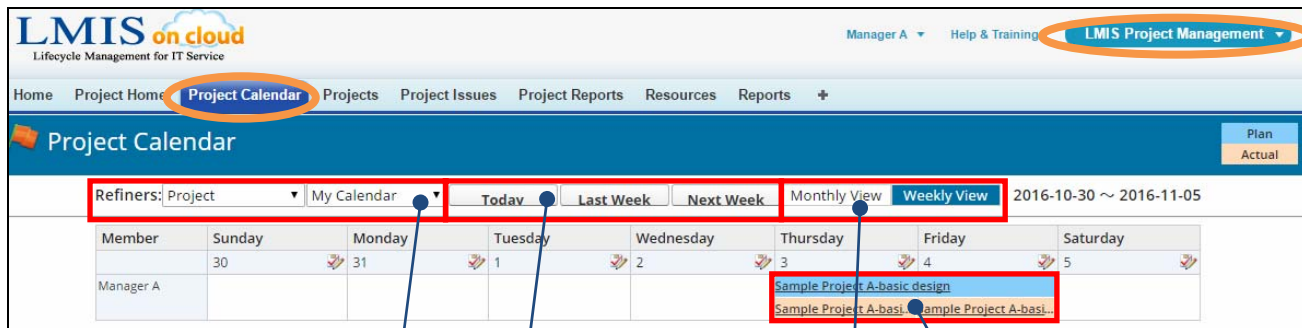


Project			
Sample Project A (In progress)			
			
WBS Name	Completion Rate	Start Plan	Planned End
Sample Project A	0%	2016/11/02	2016/11/10
Requirements design	0%	2016/11/02	2016/11/03
basic design	0%	2016/11/04	2016/11/05
<input checked="" type="checkbox"/> External design	0%	2016/11/07	2016/11/10
SSP	0%	2016/11/07	2016/11/08
project management	0%	2016/11/09	2016/11/10

◆ **Checking project calendars**

1. **Select the [LMIS Project Management] application and then click the [Project Calendar] tab.**

The weekly view of your personal calendar appears.



Refiners
Calendars can be filtered by the following criteria.

- Project
- Person in Charge

Display movement
The calendar display can be moved in accordance with the following metrics.

- Today
- Last week
- Next week

Display metric
The calendar display can be switched by the following views.

- Monthly view
- Weekly view

Planned vs Actuals
The planned and actuals of events appear in the calendar.
The planned event appears on top and the actuals of the event appears on the bottom.

Note

- The planned values that appear are taken from the WBS record without any child WBS records at the lowest hierarchical layer.
- Planned events appear across multiple dates.
- The actual work results that appear are taken from the WBS record without any child WBS records at the lowest hierarchical layer.
- Actual results appear in units of days.
- The hierarchy of the WBS name and the completion rate appears with actual results.
- Calendars can also be displayed by clicking the calendar icon on the Project Home screen.

The screenshot shows the 'Project Home' interface. It is divided into three main sections: 'WBS', 'Project', and 'Project Issue'.
 - The 'WBS' section shows a record for 'basic design' under 'Sample Project A'. It includes columns for 'Schedule', 'Cost', and 'Man hours', all with green status indicators.
 - The 'Project' section shows 'Sample Project A' with a status of 'In progress'. It also has columns for 'Schedule', 'Cost', and 'Man hours'. A calendar icon is circled in orange next to the project name.
 - The 'Project Issue' section displays the message 'There are no records to display.'

- Calendars can also be displayed by clicking the calendar icon on the Project Reference screen.

The screenshot shows the 'Project Reference' screen for 'Sample Project A'. A calendar icon is circled in orange. The screen is split into two tabs: 'Record Information' (active) and 'Related Information'.
 Under the 'Record Information' tab, there is a 'Basic Information' section with the following details:
 - Project Name: Sample Project A
 - Status: Planning in progress
 - Person in: Manager A
 - Charge: (blank)
 - Project Type: Development
 - Project Code: Sample project code
 - Responsible: Sample department
 - Department: (blank)
 - Remarks: Sample Remarks
 - Last Modified: 2016/11/04 15:55
 - Date: (blank)

◆ **Managing project schedules**

This section describes the procedure to manage project and WBS schedules.

Project and WBS schedules can be checked via the schedule section and the color of the status icon.

* A WBS record is used as an example here.

1. From the project reference screen, select the WBS for which you want to check schedule progress and then look at the [Schedule] section that appears in the record information.

The screenshot shows a software interface with a table of WBS records on the left and a detailed record view on the right. The 'basic design' record is highlighted in red in the table. The record view on the right has sections for Basic Information, Schedule, Cost, and Man hours. A red box highlights the 'Schedule' section, and a blue callout box points to a small status icon in the top right corner of this section.

WBS Name	Completion Rate	Start Plan	Planned End	Planned Time	Actual Start	Actual End	Actual Time	Person in Charge
Sample Project A	6%	2016/11/02	2016/11/10	13.0	2016/11/07			10.0 Administrator
Requirements design	0%	2016/11/02	2016/11/03	1.0				0.0 Leader A
basic design	10%	2016/11/03	2016/11/04	7.0	2016/11/07			10.0 Member A
External design	0%	2016/11/07	2016/11/10	5.0				0.0 Member A
SSP	0%	2016/11/07	2016/11/08	2.0				0.0 Member A
project management	0%	2016/11/09	2016/11/10	3.0				0.0 Member A

Schedule Status Icon
The progress can be determined by the color of the status icon.

The following table describes fields in this section.




Field Name	Description
Planned Start Date	The Planned Start Date appears here.
Actual Start Date	The Actual Start Date appears here.
Start Day Variance	The variance between the Planned Start Date and the actual start date appears here. * Calculation formula: Actual Start Date - Planned Start Date
Planned End Date	The Planned End Date appears here.

Field Name	Description
Estimated End Date	<p>The estimated end date calculated from the current actual results appears here.</p> <p>Factors used in estimated end date calculations include the actual start date, actual work time as appears in the Man Hours section, and the completion rate.</p> <p>* Calculation formula: Actual Start Date + Planned period X (Actual work time / Planned work time / Completion rate)</p> <p>* When there are no actual results data: Planned End Date + Number of delay days from the start date</p>
End Date Delay Risk	<p>This check box is selected when there is risk of a delayed end date (estimated end date is later than the Planned End Date).</p> <p>Factors used in estimated end date calculations include the actual start date, actual work time as appears in the Man Hours section, and the completion rate.</p>
Completion Rate	<p>The completion rate entered for the work results appears here.</p>
Expected Completion Ratio	<p>The expected completion ratio is calculated from the number of days that have elapsed since the Planned Start Date and from the planned period.</p> <p>The expected completion ratio is calculated starting from the first day after the Planned Start Date. The expected completion ratio on the day of the Planned Start Date is 0 %.</p> <p>* Calculation formula: Number of days that have elapsed since the Planned Start Date / Planned period</p>

Caution

- The expected completion ratio is updated whenever work results are entered. This rate will not update the next day until new work results are registered. To obtain the most recent expected completion ratio, click the [Expected Update] button at the top of the screen.

The following table describes the differences in meaning of the schedule status icon colors.

Schedule Status Icon	Description
	<p>This icon color represents the normal state.</p> <p>* Criteria: Other states (warning and abnormal) are not applicable.</p>
	<p>This icon color represents the warning state.</p> <p>* Criteria: Satisfies the following conditions</p> <ul style="list-style-type: none"> ● Start Date Delays: At least one day has elapsed since the Planned Start Date ● End Date Delay Risk: The estimated end date is later than the Planned End Date
	<p>This icon color represents the abnormal state.</p> <p>* Criteria: Satisfies the following criteria at time of completion</p> <ul style="list-style-type: none"> ● End Date Delays: The actual end date is later than the Planned End Date ● Completion rate delays: Planned completion rate is larger than the actual completion rate

When both the warning and abnormal state conditions are satisfied, the abnormal icon appears.

The warning icon appears when an issue occurs during the active state (not started). The abnormal icon appears when there is still an issue at the time of completion.

◆ **Managing project costs**

This section describes the procedure to manage project and WBS costs.

Project and WBS costs can be checked via the cost section and the color of the status icon.

* A WBS record is used as an example here.

1. From the project reference screen, select the WBS for which you want to check the cost status and then look at the [Cost] section that appears in the record information.

The screenshot shows a software interface with a table of WBS records and a detailed view for the selected 'basic design' record. The table lists various WBS elements with their completion rates and dates. The detailed view includes sections for Basic Information, Schedule, Cost, and Man hours. A callout box titled 'Cost Status Icon' points to a small orange square icon in the 'Cost' section, indicating that the color of this icon represents the cost status.

WBS Name	Completion Rate	Start Plan	Planned End	Planned Time	Actual Start	Actual End	Actual Time	Person in Charge
Sample Project A	6%	2016/11/02	2016/11/10	13.0	2016/11/07			10.0 Administrator
Requirements design	0%	2016/11/02	2016/11/03	1.0				0.0 Leader A
basic design	10%	2016/11/03	2016/11/04	7.0	2016/11/07			10.0 Member A
External design	0%	2016/11/07	2016/11/10	5.0				0.0 Member A
SSP	0%	2016/11/07	2016/11/08	2.0				0.0 Member A
project management	0%	2016/11/09	2016/11/10	3.0				0.0 Member A

The following table describes fields in this section.




Field Name	Description
Planned Cost	The planned cost appears here.
Actual Cost	The actual cost appears here.
Cost Variance	The variance between the planned cost and the actual cost appears here. * Calculation formula: Actual cost - Planned cost
Estimated Actual Cost	The estimated actual cost is calculated from the planned cost, work time, and completion rate. * Calculation formula: Planned cost X (Actual work time / Planned work time / Completion rate) * The planned cost is used as it is when there are no work results.
Cost Overrun Risk	This check box is selected when there is risk that costs will be over budget (estimated actual cost is larger than the planned cost).

Field Name	Description
Completion Cost	The completion cost is calculated from the planned cost and completion rate. * Calculation formula: Planned cost X Completion rate (Maximum work results value)
Expected Completion Cost	The expected completion cost is calculated from the planned cost and the expected completion ratio. The expected completion ratio is calculated starting from the first day after the Planned Start Date. The expected completion ratio on the day of the Planned Start Date is 0 %. * Calculation formula: Planned cost X Expected completion ratio

Caution

- The expected completion cost is updated whenever work results are entered. This rate will not update the next day until new work results are registered. To obtain the most recent expected completion cost, click the [Expected Update] button at the top of the screen.

The following table describes the differences in meaning of the cost status icon colors.

Cost Status Icon	Description
	This icon color represents the normal state. * Criteria: Other states (warning and abnormal) are not applicable.
	This icon color represents the warning state. * Criteria: Satisfies the following conditions <ul style="list-style-type: none"> ● Cost overrun risk: Estimated actual cost is larger than the planned cost
	This icon color represents the abnormal state. * Criteria: Satisfies the following criteria at time of completion <ul style="list-style-type: none"> ● Cost overrun amount: Actual cost is larger than the planned cost

When both the warning and abnormal state conditions are satisfied, the abnormal icon appears.

The warning icon appears when an issue occurs during the active state (not started). The abnormal icon appears when there is still an issue at the time of completion.

◆ **Managing project man hours**

This section describes the procedure to manage project and WBS man hours.

Project and WBS man hours can be checked via the man hours section and the color of the status icon.

* A WBS record is used as an example here.

1. **From the project reference screen, select the WBS for which you want to check the man hours status and then look at the [Man hours] section that appears in the record information.**

The screenshot shows a software interface with a table of WBS records and a detailed view for the selected 'basic design' record. The 'Man hours' section in the detailed view is highlighted with a red box, and a callout box points to it.

WBS Name	Completion Rate	Start Plan	Planned End	Planned Time	Actual Start	Actual End	Actual Time	Person in Charge
Sample Project A	6%	2016/11/02	2016/11/10	13.0	2016/11/07			10.0 Administrator
Requirements design	0%	2016/11/02	2016/11/03	1.0				0.0 Leader A
basic design	10%	2016/11/03	2016/11/04	7.0	2016/11/07			10.0 Member A
External design	0%	2016/11/07	2016/11/10	3.0				0.0 Member A
SSP	0%	2016/11/07	2016/11/08	2.0				0.0 Member A
project management	0%	2016/11/09	2016/11/10	3.0				0.0 Member A

Record Information			
Basic Information			
WBS Name	basic design		
Status	In progress		
Person in Charge	Member A		
Remarks	Last Modified 2016/11/04 16:25		
Date			
Schedule			
Planned Start Date	2016/11/03	Actual Start Date	2016/11/07
		Start Day Variance	4
Planned End Date	2016/11/04	Estimated End Date	2016/12/05
		End Date Delay Risk	✓
Completion Rate	10%	Expected Completion Ratio	50%
Cost			
Planned Cost	¥31,000	Actual Cost	¥100,000
		Cost Variance	¥69,000
Estimated Actual Cost	¥442,857	Cost Overrun Risk	✓
Completion Cost	¥3,100	Expected Completion Cost	¥15,500
		Cost	
Man hours			
Planned Work Time	7.0	Actual Work Time	10.0
		Work Time Variance	3.0
Estimated Work Time	100.0	Work Time Over-Budget Risk	✓




Man Hours Status Icon
The man hours status can be determined by the color of the status icon.

The following table describes fields in this section.

Field Name	Description
Planned Work Time	The planned work time appears here.
Actual Work Time	The actual work time appears here.

Work Time Variance	The variance between the planned work time and the actual work time appears here. * Calculation formula: Actual work time - Planned work time
Estimated Work Time	The estimated work time is calculated from the planned work time, actual work time, and completion rate. * Calculation formula: Planned work time X (Actual work time / Planned work time / Completion rate) * The planned work time is used as it is when there are no work results.
Work Time Over-Budget Risk	This check box is selected when there is risk that work time will be over budget (estimated work time is larger than the planned work time).

The following table describes the differences in meaning of the cost status icon colors.

Cost Status Icon	Description
	This icon color represents the normal state. * Criteria: Other states (warning and abnormal) are not applicable.
	This icon color represents the warning state. * Criteria: Satisfies the following conditions <ul style="list-style-type: none"> • Work time overbudget risk: Estimated work time is larger than the planned work time
	This icon color represents the abnormal state. * Criteria: Satisfies the following criteria at time of completion <ul style="list-style-type: none"> • Work time overbudget amount: Actual work time is larger than the planned work time

When both the warning and abnormal state conditions are satisfied, the abnormal icon appears.

The warning icon appears when an issue occurs during the active state (not started). The abnormal icon appears when there is still an issue at the time of completion.

11.4.2 Work Results Registration

Once a project has been started (Status: In progress), members can enter the work results for the jobs that they have been assigned.

This section describes the procedures to check assigned work and to enter work results.

The procedures described in this section are normally performed by members and leaders.

◆ Checking assigned work

1. Select the [LMIS Project Management] application.

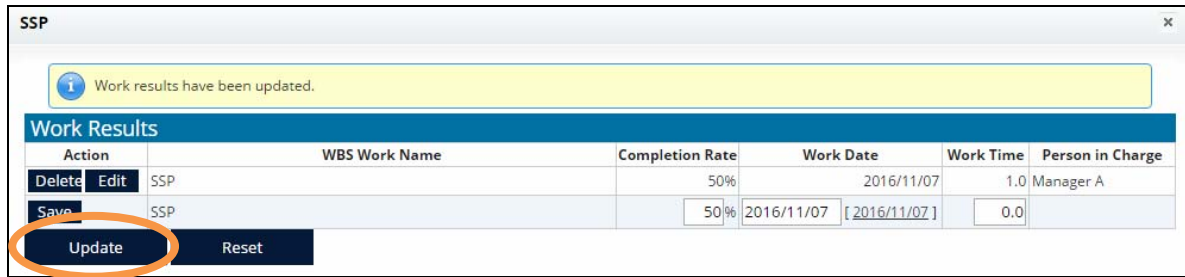
Once the [Project Home] screen appears, a list of your WBS records appears.

◆ Entering work results

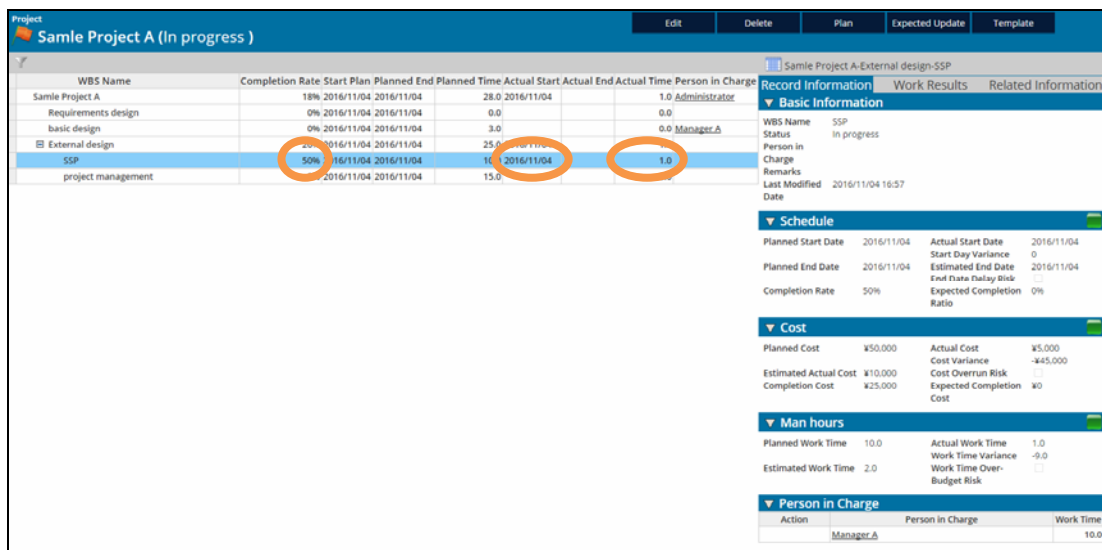
1. Click the icon next to the WBS into which you want to enter work results.

2. Once the work results entry window appears, enter the required information such as Completion Rate, Work Date, and Work Time, and then click the [Save] button.

3. Click the [update] button to update the work results.



Work results have been updated.



Note

- To update work results already entered for a particular day, click the [Edit] button and update the work results.
- To update work results for a different day, add new work results and enter the information.
- Work results performed by the same person in charge on the same work date cannot be added.
- Click the [Reset] button to clear all work results prior to the update (clicking of the [Update] button).
- Work results can also be entered on the Work Results tab on the Project Reference screen.

Samle Project A-basic design					
Record Information		Work Results		Related Information	
Action	WBS Work Name	Completion Rate	Work Date	Work Time	Person in Charge
Delete Edit	basic design	50%	2016/11/04	2.0	Manager A
Delete Edit	basic design	75%	2016/11/07	1.0	Manager A
Save	basic design	75%	2016/11/04 [2016/11/04]	0.0	

Update Reset

- Work results can also be entered by clicking the enter work results icon on the Project Calendar.

Project Calendar							
Member	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Manager A	13	14	15	16	17	18	19
		Samle Project A-External design-LMIS V3.0.0 Test					

11.4.3 Project Progress Reports

This section describes the procedures to create project and WBS progress reports.

The procedures described in this section are normally performed by managers and leaders.

◆ Reporting project and WBS progress

1. From the project reference screen, select the desired project or WBS record and then click [New Project Report] on the [Related Information] tab.

* A WBS record is used as an example here.

WBS Name	Completion Rate	Start Plan	Planned End	Planned Time	Actual Start	Actual End	Actual Time	Person In Charge
Samle Project A	26%	2016/11/04	2016/11/04	28.0	2016/11/04			4.0 Administrator
Requirements design	0%	2016/11/04	2016/11/04	0.0				
basic design	75%	2016/11/04	2016/11/04	3.0	2016/11/04			3.0 Manager A
External design	20%	2016/11/04	2016/11/04	25.0	2016/11/04			1.0
SSP	50%	2016/11/04	2016/11/04	10.0	2016/11/04			1.0
project management	0%	2016/11/04	2016/11/04	15.0				0.0

2. Once the project report edit screen appears, enter the required information and then click the [Save] button.

Project Report Edit [Save] [Save & New] [Cancel]

Basic Information ! = Required Information

Subject: progress report
 Status: Ticket in progress
 Ticket Date: 2016/11/04 [2016/11/04]
 Report Date: 2016/11/04 [2016/11/04]
 Person in Charge: Manager A
 Report Content: With respect to SSP, it was completed until the XX.

Related Information

Project: [Search]
 WBS: SSP [Search]

System Information

Owner: Manager A

[Save] [Save & New] [Cancel]

The following table describes each entry field.

Basic Information	
Subject	Enter the subject.
Status	Select the status from the pull-down menu. Options include: Ticket in progress and Finish.
Person in Charge	Select the person in charge via a lookup process. * Only project members can be set.
Ticket Date	Enter the ticket date. * This field is automatically populated with the record creation date, which is the default value.
Report Date	Enter the report date. * This field is automatically populated with the record creation date, which is the default value.
Report Content	Enter the report content.
Related Information	
Project	Select the related project via a lookup process. * If a project was ticketed on the Project screen, this field will be automatically populated with that project.
WBS	Select the related WBS record via a lookup process. * If a WBS record was ticketed on the Project screen, this field will be automatically populated with that WBS record.
System Information	
Owner	This parameter is automatically set with the user who is the person in charge (resource).

After the information is saved, the project report is associated with the related information.

The progress can now be checked here.

03/22/2021 Samle Project A-External design-SSP

Record Information
Work Results
Related Information

Project Issue
[New Project Issue](#)

No records to display

Project Report
[New Project Report](#)

Action	Subject	Person in Charge	Status
Edit Del	progress report	Manager A	Ticket in progress

Notes & Attachments
[New Note](#)
[Attach File](#)

No records to display

11.4.4 Project Issue Management

This section describes the procedure to manage project issues.

◆ Creating project and WBS issues

1. From the project reference screen, select the project or WBS record for which you want to create project issue and then click [New Project Issue] on the [Related Information] tab.

The create new project issue ticket screen appears.



2. Enter the required items and click the [Save] button.

The following table describes each entry field.

Basic Information Section	
Subject	Enter the subject.
Status	Select the status from the pull-down menu. Options include: Ticket in progress, Response Unneeded, Not Yet Started, Responding, and Finish.
Person in Charge	Select the person in charge of the issue via a lookup process. * Only project members can be set.
Ticket Date	Enter the ticket date. * This field is automatically populated with the record creation

Basic Information Section	
	date, which is the default value.
Response Deadline	Enter the response deadline for the issue.
Priority	Select the priority from the pull-down menu. Options include: high, middle, and low.
Alert	<p>Use the pull-down menu to enable/disable the response deadline alert pop-up.</p> <p>If enabled, the response deadline is scheduled into the calendar on the Home screen. The response deadline alert pop-up will appear at the appropriate timing.</p> <p>* This function is enabled only when the status is set to Ticket in progress, Not Yet Started, or Responding.</p> <p>Alerts will not appear when the status is response unneeded or finish.</p>
Response Start Date	Enter the Response Start Date.
Response End Date	Enter the Response End Date.
Issue Content	Enter the issue content.
Response Content	Enter the response content.
Related Information Section	
Project	<p>Select the related project via a lookup process.</p> <p>* If a project was ticketed on the Project screen, this field will be automatically populated with that project.</p>
WBS	<p>Select the related WBS record via a lookup process.</p> <p>* If a WBS record was ticketed on the Project screen, this field will be automatically populated with that WBS record.</p>
System Information Section	
Owner	This parameter is automatically set with the user who is the person in charge (resource).

After the information is saved, the project issue is associated with the related WBS information. The project report can now be checked here.

Samle Project A-External design-SSP

Record Information Work Results **Related Information**

Project Issue [New Project Issue](#)

Action	Subject	Person in Charge	Status
Edit Del	XX of the process does not work	Manager A	Ticket in progress

Project Report [New Project Report](#)

No records to display

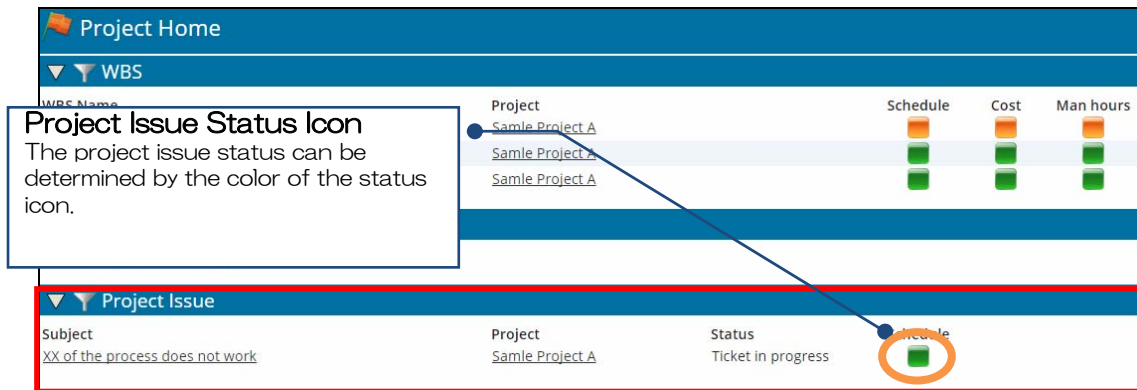
Notes & Attachments [New Note](#) [Attach File](#)

No records to display




◆ **Managing project issues**

This section describes the procedure to manage project issues.

1. From the Project Home screen, check the [Project Issue] section.



The following table describes the differences in meaning of the man hours status icon colors regarding the project issue.

Schedule Status Icon	Description
	This icon color represents the normal state. * Criteria: Other states (warning and abnormal) are not applicable.
	This icon color represents the warning state. * Criteria: Status is "Responding" and the Response End Date is later than the Response Deadline.
	This icon color represents the abnormal state. * Criteria: The status is "Finish" and the Response End Date is later than the Response Deadline.

11.5 Project Templates

Project templates are used to define frequently used WBS records. This section describes the procedure to pre-define project templates.

11.5.1 Registering Project Templates

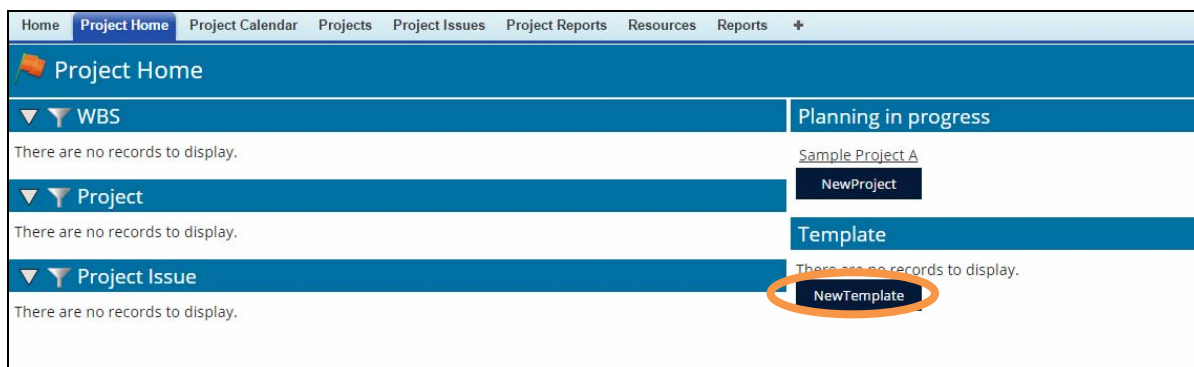
This section describes the procedure to maintain project templates.

Only users with suitable privileges can perform the operation described in this section.

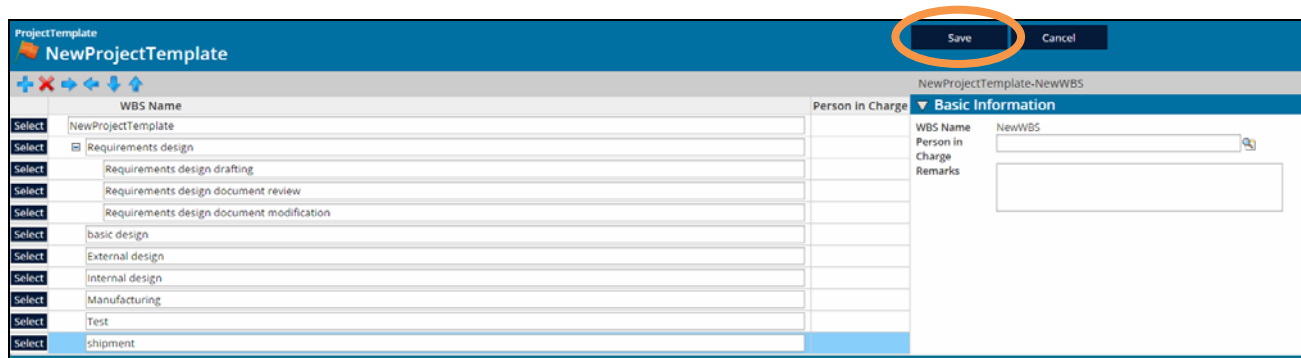
◆ Creating project templates

1. As a user with the appropriate privileges, click the [NewTemplate] button from the Project Home screen.

The create new project template screen appears.



2. Refer to "11.3.2 WBS Registration" to add a generic WBS record to be used when creating projects and then click the [Save] button.



Note

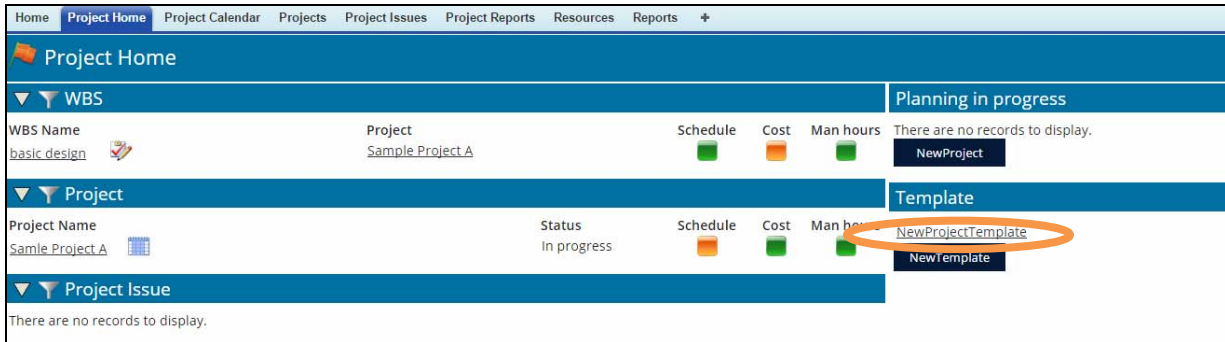
- Templates can also be created on the basis of the relevant project by clicking the [Template] at the top of the project reference screen.

Edit		Delete		Plan		Expected Update		Template	
Sample Project A									
Actual Time	Person in Charge	Record Information				Related Information			
3.0	Manager A	▼ Basic Information							
0.0		Project Name	Sample Project A						
3.0		Status	In progress						
0.0		Person in Charge	Manager A						
0.0		Project Type	Development						
0.0		Project Code	Sample project code						
0.0		Responsible Department	Sample department						
		Remarks	Sample Remarks						
		Last Modified Date	2016/11/04 17:51						

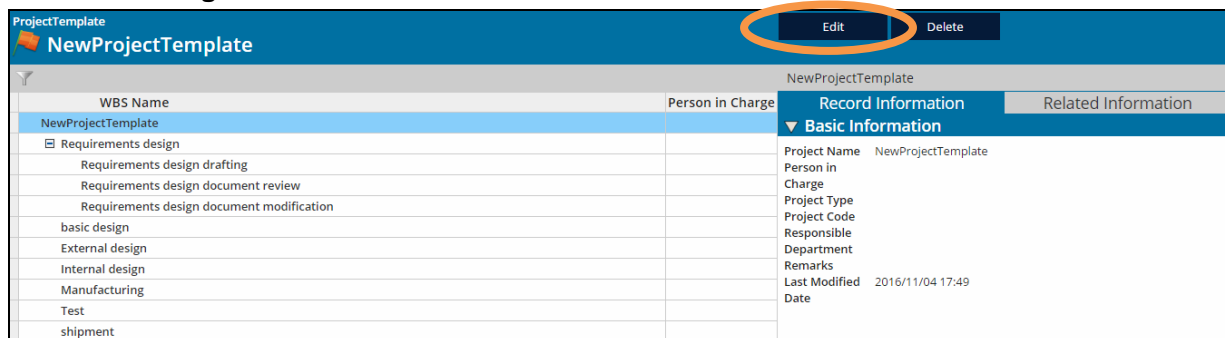
◆ **Editing project templates**

1. **As a user with the appropriate privileges, click the link for the desired template from the Project Home screen.**

The project template reference screen appears.



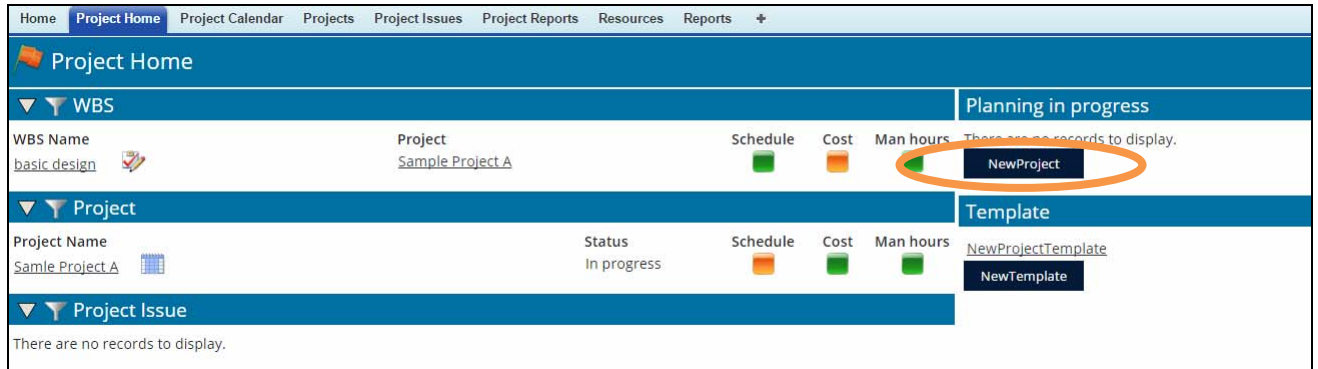
2. **Click the [Edit] button, edit the content, and then click the [Save] button to save the changes.**



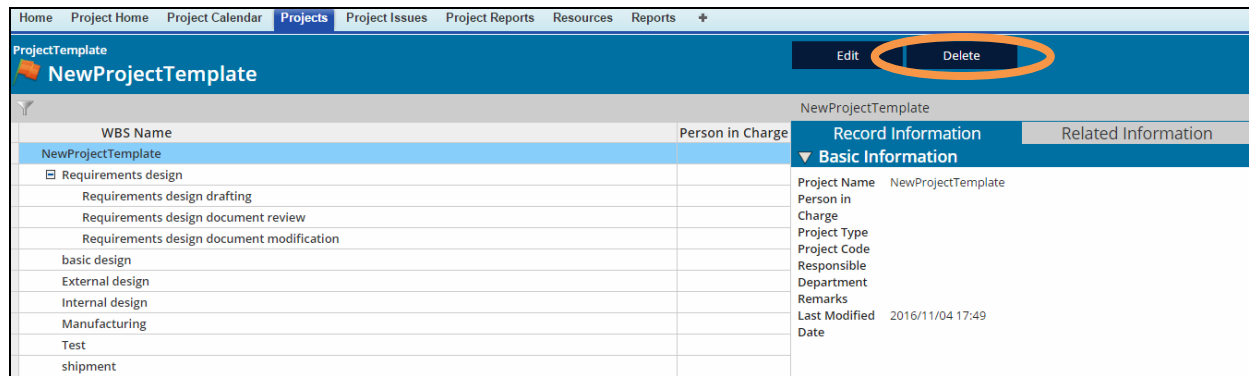
◆ **Deleting project templates**

1. **As a user with the appropriate privileges, click the link for the desired template from the Project Home screen.**

The project template reference screen appears.



2. **Click the [Delete] button to delete the project template.**



Note

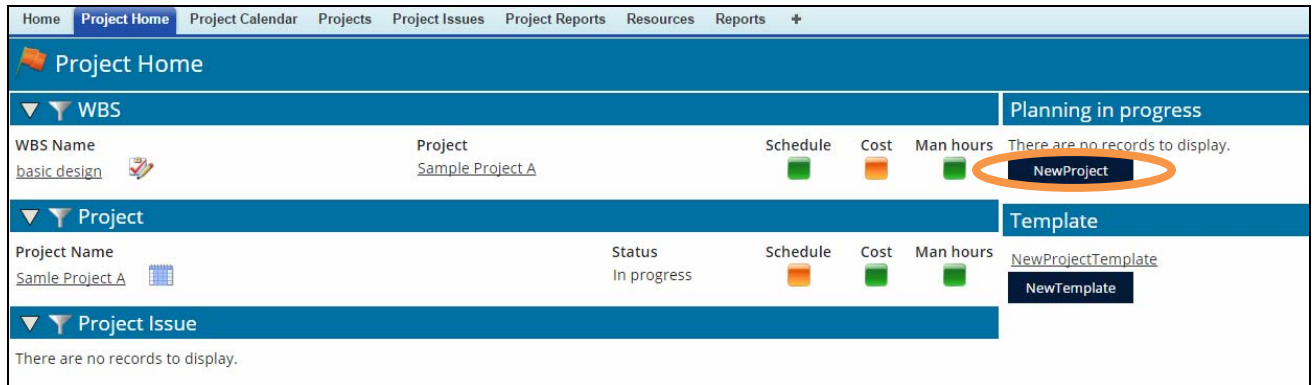
- Deleting a project template will not affect any projects which used the template.

11.5.2 Using Project Templates

This section describes the procedure to use project templates.

1. From the Project Home screen, click the [NewProject] button.

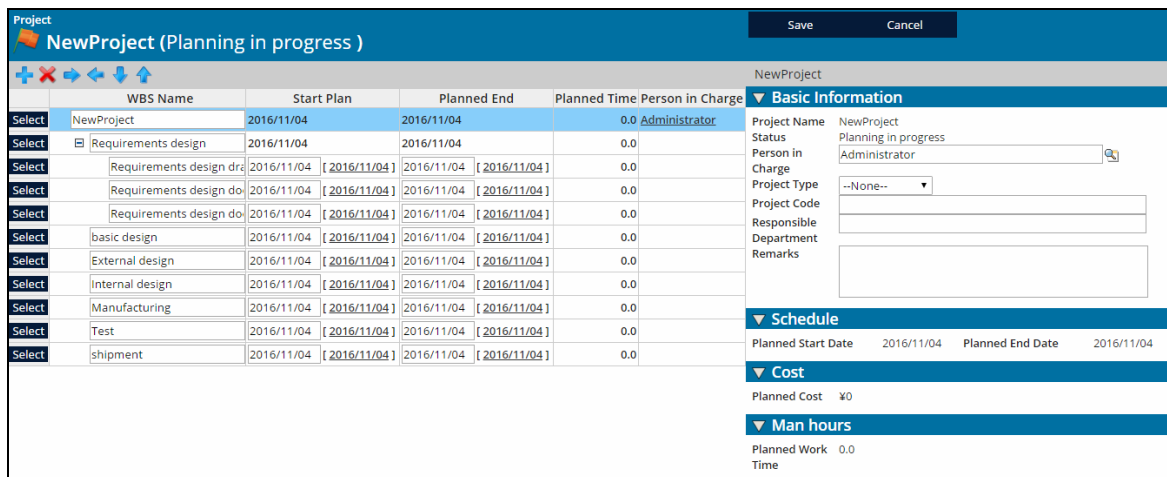
The new project planning screen appears.



2. Select the desired template and then click the [Select] button.



The create new project screen appears loaded with the selected project template. Finish creating the project from this screen.



12. Process Statistics

12.1 Process Evaluation Index

Each process has the following objectives and evaluation indices.

Incident Management	Promote the recovery of operational service conditions and minimize the impact on operations
----------------------------	--

[Evaluation Index]

- Average time required until the incident is resolved or avoided
- Ratio processed within the SLA scope
- Average per incident cost
- Ratio of incidents completed by the service desk as the primary support

Problem Management	Improve the initial problem resolution rate by improving IT service quality, reducing the volume of incidents, decreasing the number of unresolved problems, improve organizational learning, and accumulating solutions
---------------------------	--

[Evaluation Index]

- Work Time required to resolve a root cause (man-hours) by each staff
- Time required to resolve the root cause of a problem

Change Management	Formulation and dissemination of change procedures including emergency changes and patch application, change evaluation/priority setting/approval, planned changes, as well as tracking and reporting changes
--------------------------	---

[Evaluation Index]

- Number of implemented changes that failed
- Number of RFCs that did not receive permission
- Number of RFCs that remain open
- Number of RFCs that were not closed within the scheduled period
- Number of changes caused by an incident
- Number of emergency changes
- Number of incidents caused by changes
- Customer satisfaction, User satisfaction

Release Management	Formulation of policies and agreement to release, creation of release plans, agreement with relevant parties, response to failed releases, post-release deliverables/record creation, set up of release test environments, formulation of release procedures, analysis of failed/successful releases
---------------------------	--

[Evaluation Indicators]

- Number of releases that were released according to schedule
- Ratio of releases with an accurate post-release CMDB
- Number of releases that were released without testing
- Number of incidents caused by releases
- Number of defects discovered at the pre-release testing stage
- Number of defects discovered after release
- Ratio of unauthorized software in use
- Number of software and hardware units in the live environment that are not stored in DSL or DHL
- Customer satisfaction, User satisfaction

FAQ Management	Help users resolve problems by themselves, and reduce workload to address incidents.
-----------------------	--

[Evaluation Indicators]

- Number of views after the FAQ is published
- Number of users that have accessed the FAQ after it was published

12.2 Using the Reports

The records registered with this product can be aggregated and displayed as a report.

Display the Reports from the [LMIS Dashboard] apps menu.

The following reports are provided in this product.

Incident Management Reports	
Incident Statistics By Service Report	Monthly Incident Stats By Service Report
Incident Statistics By Status Report	Monthly Incident Stats By Status Report
Incident Statistics By Owner Report	Mthly Incidnt Stats By Respsn Deadln Rep
Incident Statistics By Account Report	This Month Incident Stats By Service Rep
Respsn Deadln Elpse Incident Stats Rep	This Mth Close Incdnt Stats By Ownr Rep
Incident Matrix By Service Cat Report	Mthly Prop Matrix By Occur Inc Stat Rep
Mthly Prop Matrx Occur Inc Fin Type Rep	Yearly Occur Incdnt Comp Mtrx By Srv Rep
Yearly Unfin Incdnt Comp Mtrx By Srv Rep	Resolved Incident Stats By Prob Mgmt Rep
Problem Management Reports	
Problem Statistics By Category Report	Monthly Problem Stats By Category Report
Problem Statistics By Service Report	Monthly Problem Stats By Service Report
Problem Statistics By Status Report	Monthly Problem Stats By Status Report
Problem Statistics By Owner Report	This Mth Closed Prob Stats By Serv Rep
Respsn Deadln Elpse Problem Stats Rep	This Mth Closed Prob Stats By Ownr Rep
Audit History Reports	
Event Audit History Report	Task Audit History Report
Incident Audit History Report	Document Audit History Report
Service Audit History Report	Hardware Audit History Report
Software Audit History Report	Problem Audit History Report
Change Audit History Report	Release Audit History Report
FAQ Audit History Report	Site Operation Statistics Report
Information Audit History Report	Site Login History Report
Event Management Reports	
Event Statistics By Category Report	Monthly Event Stats By Category Report
Event Statistics By Service Report	Monthly Event Stats By Service Report
Event Statistics By Account Report	

Configuration Management Reports	
Related Hardware Stats By Service Report	Software Statistics By Type Report
Service Statistics By Status Report	Document Statistics By Type Report
Software Statistics By Status Report	Hardware Statistics By Type Report
Document Stats By Status Report	This Month Period End Service Stats Rep
Hardware Statistics By Status Report	This Month Period End Software Stats Rep
Period End Service Statistics Report	This Month Period End Hardware Stats Rep
Period End Software Statistics Report	Network Statistics By Hardware Report
Period End Hardware Statistics Report	Related HW Stats By Software Report
SW Contract Stats By Provider Report	HW Contract Stats By Provider Report
Installed HW/Lic Stats By SW Ver Report	Installed HW/Lic Stats By SW Report
Res Alloc Stats in Virt Env Report	
Task Management Reports	
Task Statistics By Status Report	Mthly Task Stats By Status Report
Task Statistics By Type Report	Monthly Task Stats By Type Report
Task Statistics By Owner Report	This Mth Fin Tsk Stats By Ownr Rep
Respsn Deadln Elpse Task Stats Rep	
Change Management Reports	
Change Statistics By Status Report	Change Statistics By Owner Report
Monthly Change Stats By Status Report	Change Stats By Service to Change Report
This Month Failed Change Stats Rep	Mthly Change Stats By Serv to Chng Rep
This Mth Fin Change Stats By Ownr Rep	This Mth Fin Chng Stats By ChngServ Rep
This Month Succeeded Change Stats Rep	Chng Schd Pst End Dte/Tme Chng Stats Rep
This Month Scheduled Change Stats Rep	Unfin Change Request Statistics Report
Release Management Reports	
Release Statistics By Status Report	This Month Failed Release Stats Rep
Rel Stats By Service to Release Report	This Mth Fin Rel Stats By Ownr Rep
Mthly Rel Stats By Serv to Rel Report	This Month Succeeded Release Stats Rep
This Mth Fin Rel Stats By Srv to Rel Rep	This Month Scheduled Release Stats Rep
Monthly Release Stats By Status Report	Release Statistics By Owner Report
Monthly Rel Stats By Rel Results Report	Dply Schd Past End Dte/Tme Rel Stats Rep
FAQ Management Reports	
FAQ Statistics By Status Report	FAQ Usage Evaluation By Record Report
Information Management Report	
Information Statistics By Status Report	

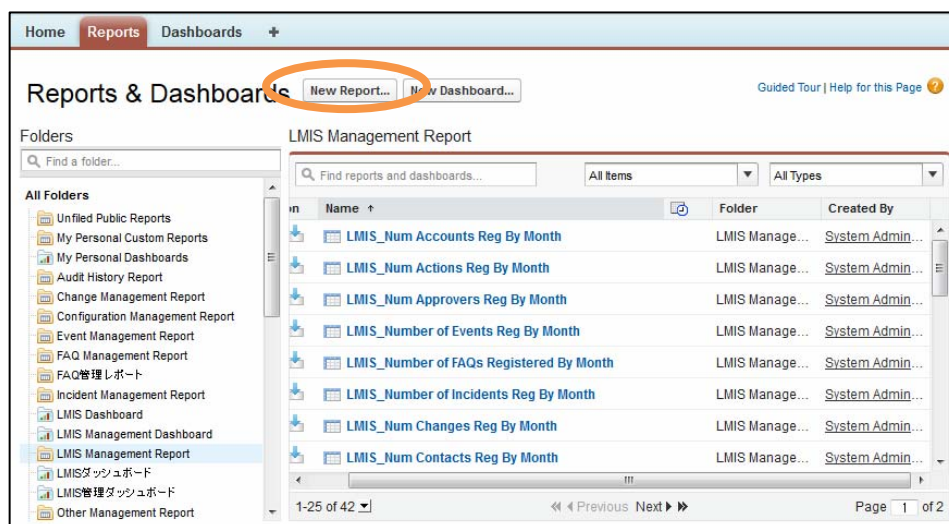
Project Management Reports	
WBS Audit History Report	Finished Projects By Type
WBS Work Audit History Report	Finished Projects By Department
Project Issue Audit History Report	Expired Project Issues
Project Audit History Report	Projects in Planning By Type
Plan Statistics By Responsible Party	Projects in Planning By Department
Actual Statistics By Responsible Party	Projects in Progress By Type
Weekly Project Progress Report	Projects in Progress By Department
Project Roles Statistics	Projects in Progress with Issues
Project Reporting Audit History Report	Unclosed Project Issues
Resource Audit History Report	
Other Management Reports	
Due Date Statistics By Status Report	This Mth Prd End Ser Contract Stats Rep
Period End Service Contract Stats Report	This Mth Act Prd End Due Date Stats Rep
Actual Period End Due Date Stats Rep	This Mth Sched Prd End DueDate Stats Rep
Scheduled Period End Due Date Stats Rep	Provider Contract By Year Stats Report

12.3 How to Create Reports

Various reports can be created by combining records. Create reports from the [LMIS Dashboard] apps menu.

This section explains the procedure to create a new report with the Salesforce Report Builder.

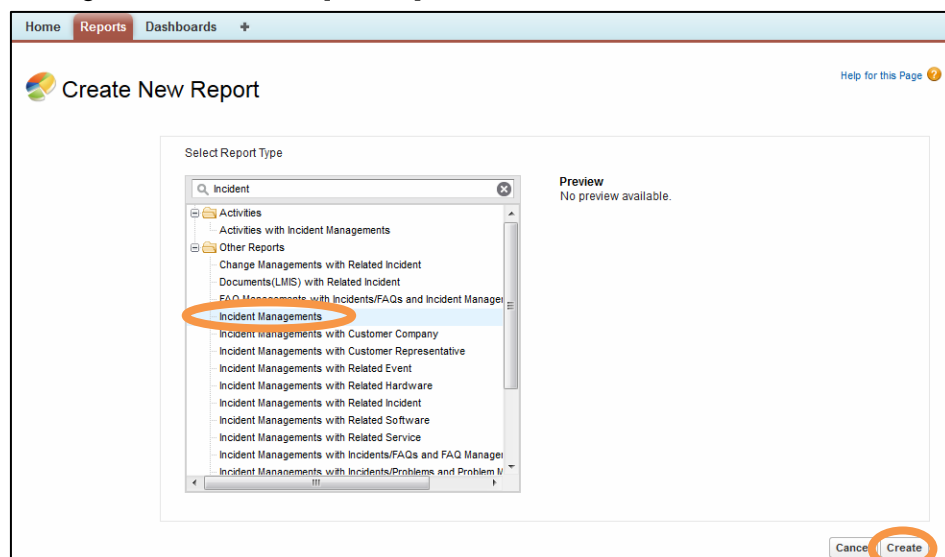
1. Click the [New Report] button on the Reports & Dashboards screen.



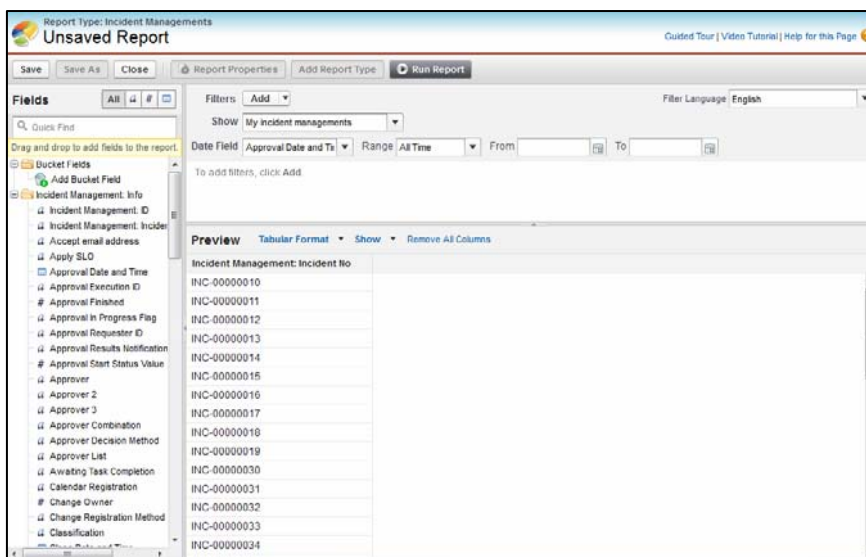
The Report creation screen is displayed.

2. Select [Other Reports] under [Select Report Type].

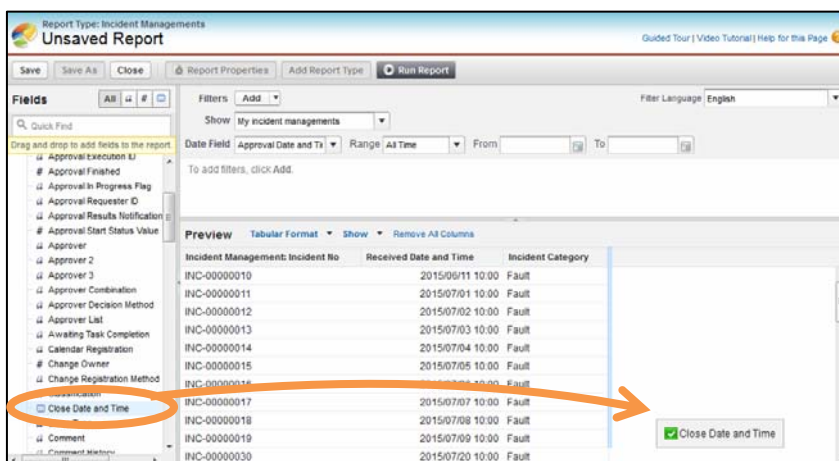
Select the target report type from the "Other Reports" folder. As an example, select "Incident Managements" and click [Create].



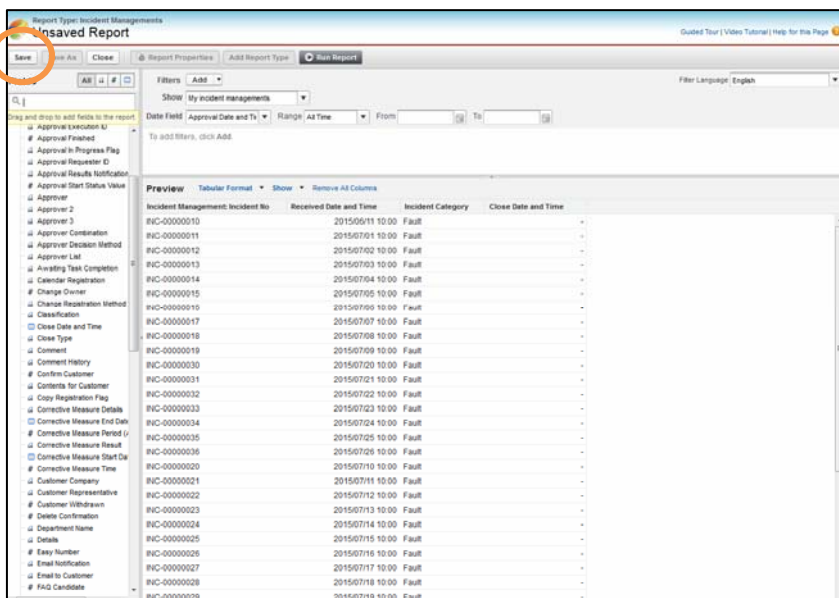
An unsaved Report creation screen is displayed.



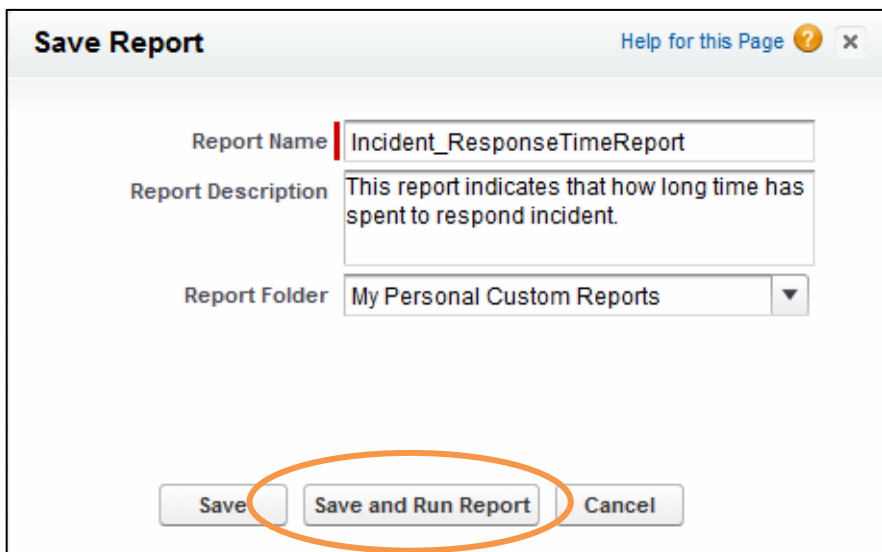
3. Drag and drop the fields to include in the report from the [Fields] section on the left-side of the screen to the desired column.



4. Click the [Save] button.

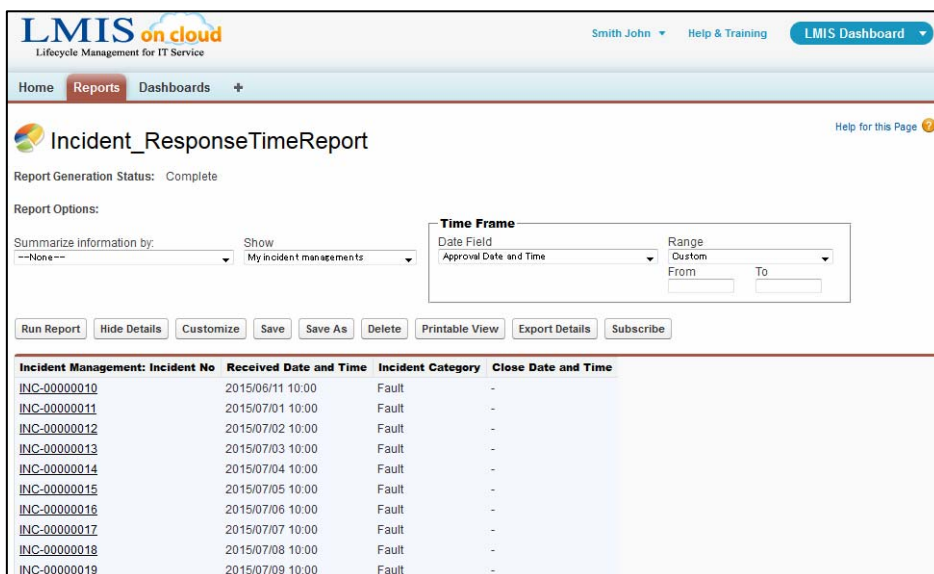


- When the report save dialog is displayed, set the report name and other items and click the [Save and Run Report] button.



Click the [Save] button if you do not wish to display the record after it is saved.
 Click [Cancel] to stop creating the report.

This completes the procedure to create a new report.

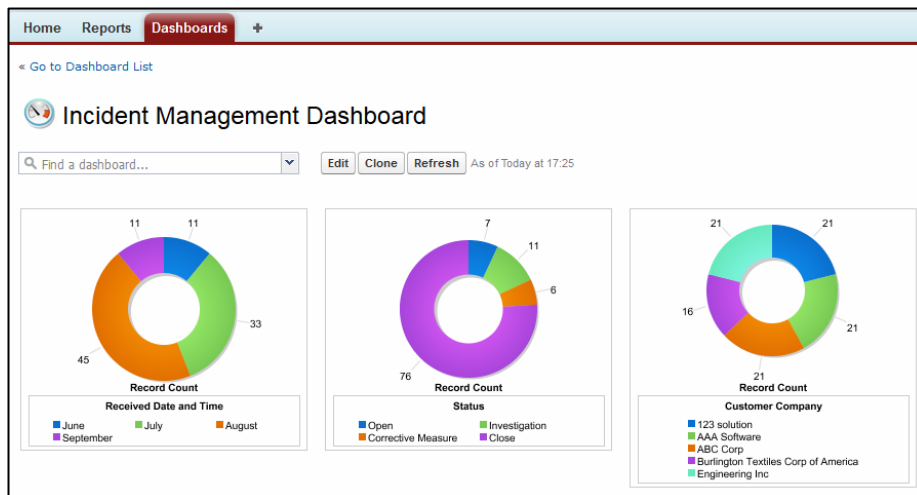


For more details about creating reports, refer to the *Salesforce User Guide* in "Help & Training".

12.4 Using the Dashboard

The Dashboard allows you to visually confirm the information with a graph based on the reports described above. Display the Dashboard from the Home screen or the [LMIS Dashboard] apps menu.

This section introduces the types of Dashboards provided in this product and the reports which are the source of information for the Dashboard.



The following types of Dashboards are provided.

Incident Management Dashboard

Problem Management Dashboard

Configuration Management Dashboard

Change Management Dashboard

Release Management Dashboard

◆ **Incident Management Dashboard**

[Graph] / [Report which is the information source]

Related Service Name / Incident Statistics By Service Report

Status / Incident Statistics By Status Report

Customer Company / Incident Statistics By Account Report

◆ **Problem Management Dashboard**

[Graph] / [Report which is the information source]

Related Service Name / Problem Statistics By Service Report

Status / Problem Statistics By Status Report

Problem Management: Owner Name / Problem Statistics By Owner Report

◆ Configuration Management Dashboard

[Graph] / [Report which is the information source]
Hardware Type / Hardware Statistics By Type Report
Software Type / Software Statistics By Type Report
Document Type / Document Statistics By Type Report

◆ Change Management Dashboard

[Graph] / [Report which is the information source]
Related Service Name / Change Stats By Service to Change Report
Status / Change Statistics By Status Report
Change Management: Owner Name / Change Statistics By Owner Report

◆ Release Management Dashboard

[Graph] / [Report which is the information source]
Related Service Name / Rel Stats By Service to Release Report
Status / Release Statistics By Status Report
Release Management: Owner Name / Release Statistics By Owner Report

12.5 Creating a Dashboard

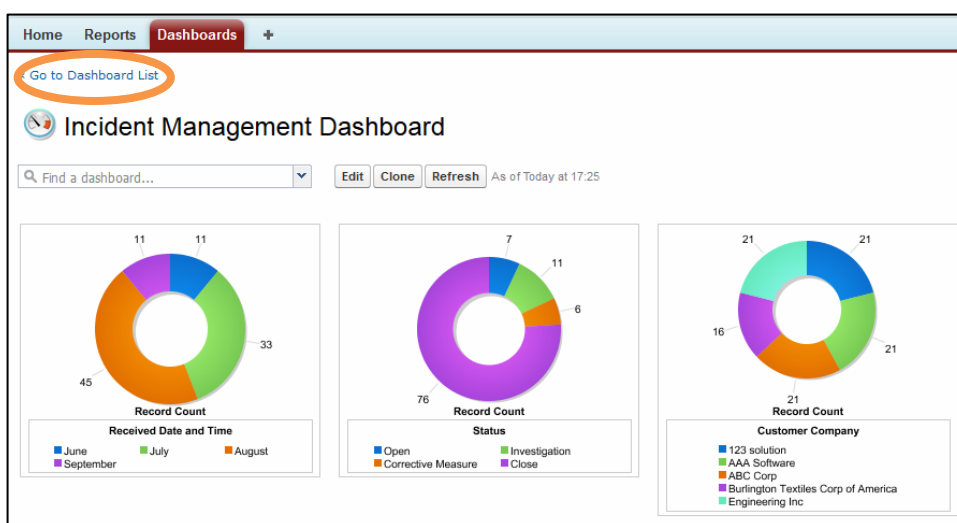
Create a dashboard by combining reports.

Create a Dashboard from the [LMIS Dashboard] apps menu.

This section explains the procedure to create a new report with the Salesforce Dashboard Builder.

Create the report to use in the Dashboard in advance.

1. Click the [Dashboards] tab to display the dashboard reference screen.
2. Click [Go to Dashboard List] tab to display the LMIS Dashboard screen.



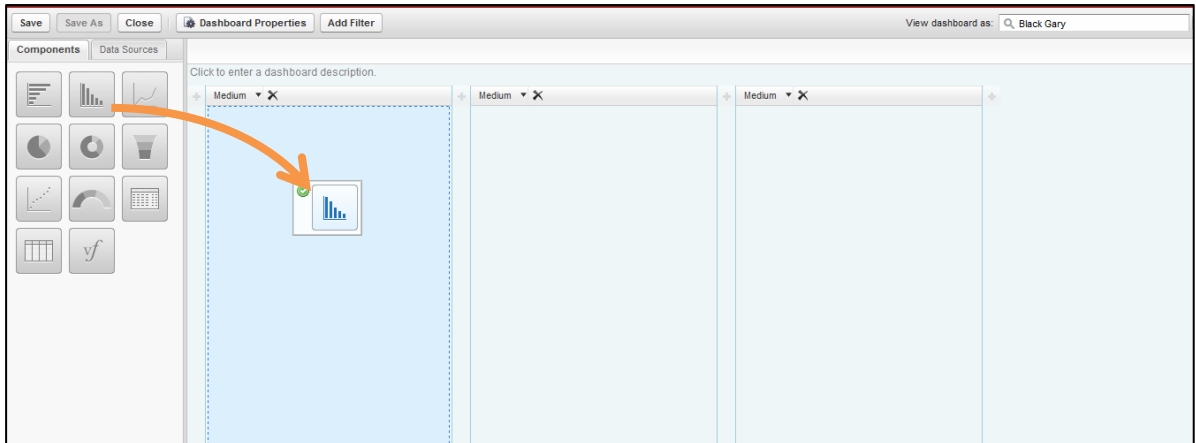
3. Click the [New Dashboard] button.

The screenshot shows the 'Reports & Dashboards' interface. The 'New Dashboard...' button is circled in orange. Below the button, there is a table listing various dashboards under the 'LMIS Dashboard' folder.

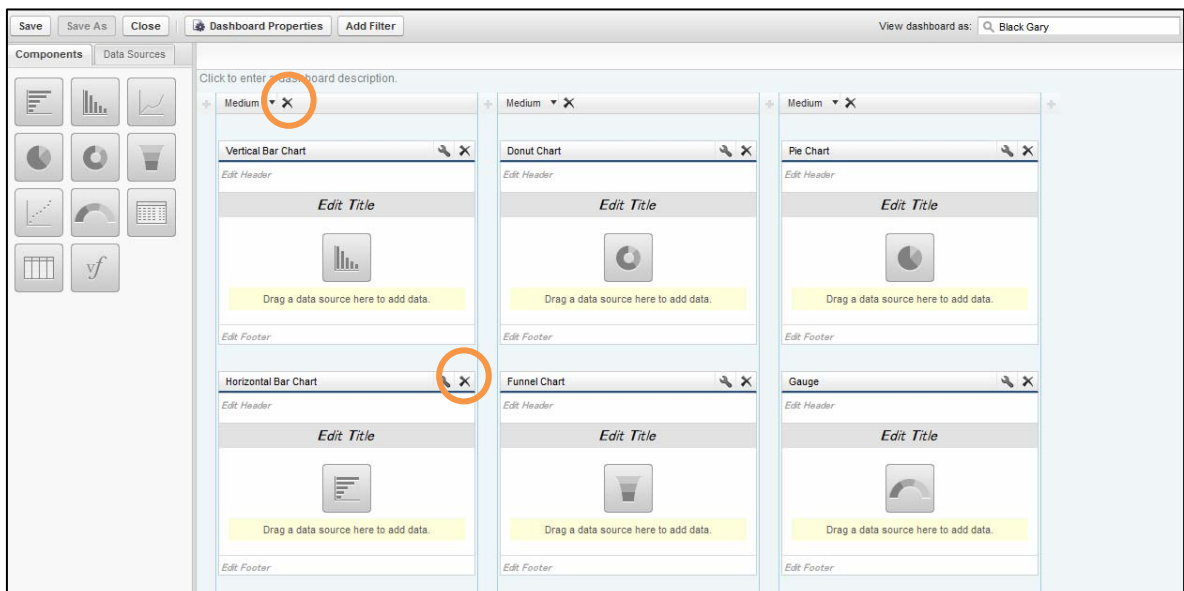
Action	Name	Folder	Created By
+	Change Management Dashboard	LMIS Dashboard	System Admin 15
+	Configuration Management Dashboard	LMIS Dashboard	System Admin 15
+	Incident Management Dashboard	LMIS Dashboard	System Admin 15
+	Problem Management Dashboard	LMIS Dashboard	System Admin 15
+	Release Management Dashboard	LMIS Dashboard	System Admin 15

The Dashboard creation screen is displayed.

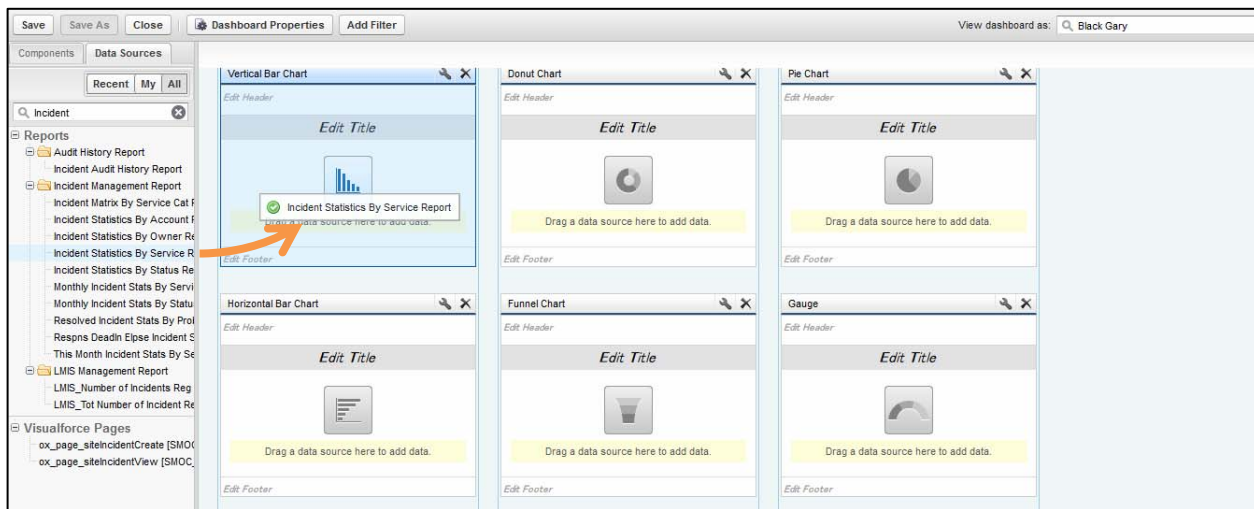
4. Select the graph format from the [Components] tab and then drag and drop it on the dashboard.



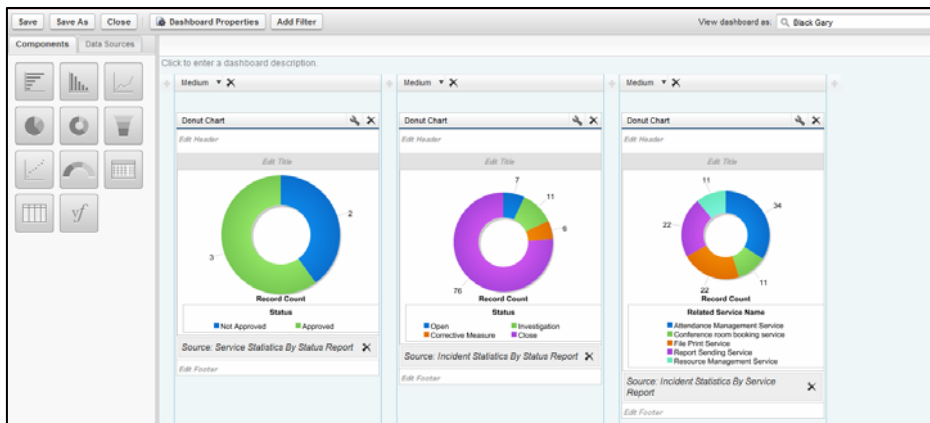
The Dashboards or Components can be deleted by clicking the [x] button.



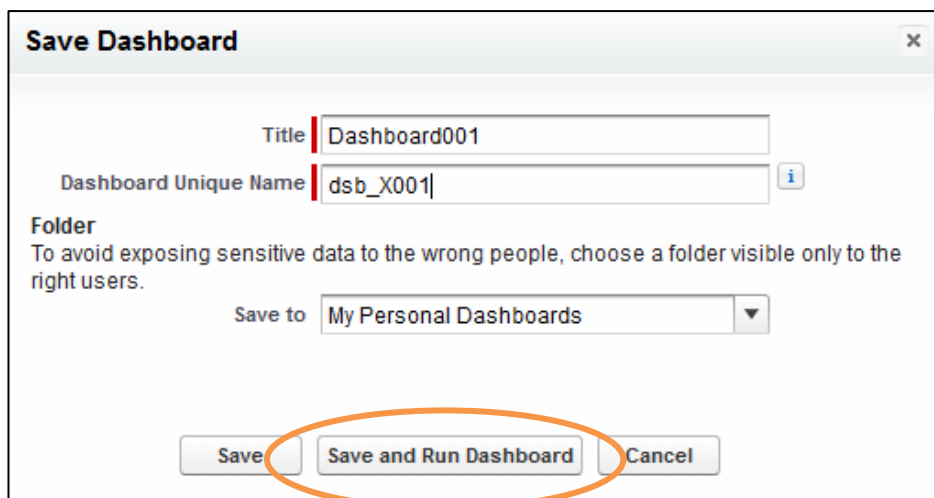
5. Select a report from the [Data Sources] tab and then drag and drop it onto a component.



The graph appears.



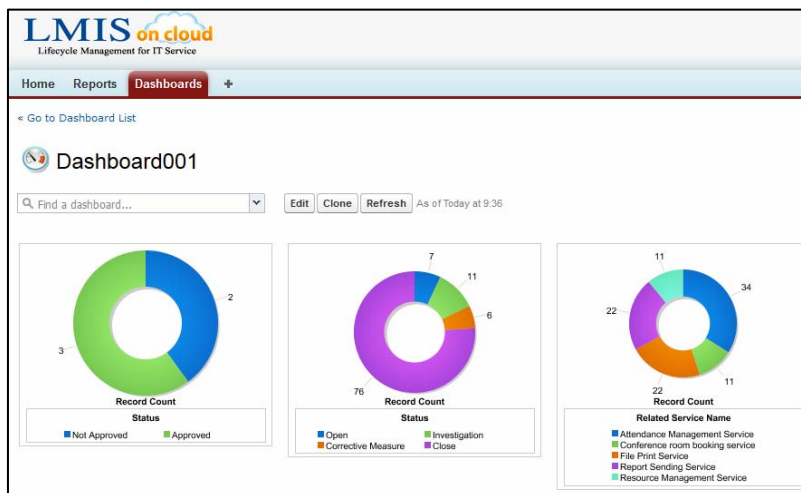
- 6. Click the [Save] button.
- 7. When the save Dashboard dialog is displayed, set the Dashboard name and other items and click the [Save and Run Dashboard] button.



Click the [Save] button if you do not wish to display the record after it is saved.

Click [Cancel] to stop creating the report.

This completes the procedure to create a new Dashboard.



For more details about creating reports, refer to the *Salesforce User Guide* in "Help & Training".

Appendix. Utility Function

Appendix.1 Notification Function

When each new record is created or the status is changed on the detail screen, a message noting the change and any comments is created and sent to the associated user.

The notification is displayed in the portal in the middle of the top page.

Notification records are primarily created in the following situations.

- Status update (incident, problem, change, release, configuration information)
- Approval process implementation (incident, problem, change, release, configuration information)
- Task, release closure

Cases when notifications occur		Notification recipient
Status update	Open, Close	Record Owner
	Update by approval*	Record Owner
	Other	Record Approver
Approval process implemented	Approval Request	Record Approver
	Request Cancellation	Record Approver
	Approval*	Record Owner
	Reject	Record Owner
Task closure*		Record Owner, Process Owner related to the task
Release Management closure*		Record Owner, Change Management Owner related to the Release Management

* One notification record is created for each Notification Destination user.

Appendix.1.1 Email Notification

An Email with a URL to the notification content and record can be sent at the same time that the notification record is created.

This section explains how to setup Email notifications.

- 1. Open the detail screen for each record.**
- 2. Select either of the following from the mail notification dropdown list under [Control Information].**

ON: Send an Email notification together with the portal notification.

OFF: Only send the portal notification.

- 3. Click the [Save] button.**

This completes the Email notification setting.

Appendix.1.2 Message Notification

In addition to automatic notifications for each process, any notification message can also be sent manually.

1. Select the [LMIS Management] apps menu.
2. Click the [Notifies] tab to display the notification home screen.
3. Click the [New] button.

The notification screen is displayed.

4. Enter the user to send the notification to in [Owner]. Select either of the following from the dropdown list.

User: the registered user

Queue: the user set to the queue

Click the [Owner Lookup] button to search for the Notification Destination user.

5. Enter a message in [Details].
6. Select either of the following from the [Email Notification] dropdown list.

ON: Send an Email notification together with the portal notification.

OFF: Only send the portal notification.

7. Click the [Notification] button.

A message is sent to the portal of the Notification Destination user.

Action	Mark as Read	Related Link	Details	Related Subject	Notify No	Created By
Edit	<input type="checkbox"/>	https://ap2.salesforce.co...	The incident approval re... Check the details and ap...	test	NTF-00000026	Staff, 2015/07/23 11:40
Edit	<input type="checkbox"/>	https://ap2.salesforce...	The incident corrective ...	test	NTF-00000025	Staff, 2015/07/23 11:40

Appendix.1.3 Message Notification with Associated Process

Information

A message can be sent from the detail screen of each process.

This example explains the procedure to associate a notification with a change to send a custom message.

1. **Open the detail screen of the desired Change Management to associate the notification.**
2. **Click the [New Notify] button under [Related Notification] in the Related List.**

The notification screen is displayed with the associated change management number.

3. **Enter the user to send the notification to in [Owner]. Select either of the following from the dropdown list.**

User: the registered user

Queue: the user set to the queue

Click the [Owner Lookup] button to search for the Notification Destination user.

4. **Enter a message in [Details].**
5. **Select either of the following from the [Email Notification] dropdown list.**

ON: Send an Email notification together with the portal notification.

OFF: Only send the portal notification.

6. **Click the [Notification] button.**

A message is sent to the portal of the Notification Destination user.

My Notifications							Clone	Create New View	Switch to Task List
Action	Mark as Read	Related Link	Details	Related Subject	Notify No	Created By			
<input type="checkbox"/> Edit	<input type="checkbox"/>	https://ap2.salesforce.co...	The incident approval re... Check the details and ap...	test	NTF-00000026	Staff, 2015/07/23 11:40			
<input type="checkbox"/> Edit	<input type="checkbox"/>	https://ap2.salesforce...	The incident corrective ...	test	NTF-00000025	Staff, 2015/07/23 11:40			

Appendix.2 Task(LMIS) Function

A task is work related to Incident Management, Problem Management, Change Management, and Release Management.

Work (task) that is attached to a related record can be managed.

You can also set up sub tasks to create hierarchical tasks.

Appendix.2.1 How to Use

This section explains how to register a task.

1. Open the task edit screen.

To register tasks related to each process, click the [New Task(LMIS)] button in the Related List on the detail screen of each process.

2. Enter the required items (those marked with | are required).

3. Select either of the following from the [Approver Decision Method] dropdown list under [Control Information] to change the task approval flow.

Q: Either the record "Owner" or the "Approver" can specify the Owner after the record is created.

C: The user specified as the [Owner: For Work Request] is the "Owner".

If nothing is specified for the [Owner: For Work Request], then the creator is the "Owner".

The "Approver" is the manager of the task's "Owner".

* Approval or rejection comments can be set to automatic entry.

For more details, refer to the "LMIS on cloud コンフィグレーションガイド".

Caution

- If the value of "Approver Decision Method" is "C" and the manager of the "Owner" is not specified, then the "Approver" is set to the "Owner".
4. **Set [Awaiting Task Completion] under [Control Information] to ON to issue an Approval Request when all of the sub tasks close.**
 5. **Click the [Save] button.**

The response deadline and start date and time for a task can also be registered in the calendar.

Refer to "Appendix.9 Calendar Registration" for the Calendar Registration procedure and how to display the calendar.

Appendix.3 Due Date Function

This section provides an overview of the Due Date function. The Due Date function manages schedules and actual dates. It is used in association with Services and Service Contracts.

Appendix.3.1 How to Use

This section explains how to provide warning notices related to schedules and actual dates.

1. Open the Create New screen.

Refer to the previous section "2.8 Creating, Editing and Deleting Records" for details on how to open the screen.

2. Enter the required items (those marked with | are required).
3. Select the timing for providing warning notices in [Notify Warning] under [Control Information].

4. Set the notification time in units of hours in [Warning Notification Time].

Ex.)

[Scheduled End Date and Time]: 2011/01/19 17:00

[Notify Warning]: Before Scheduled End Date

[Warning Notification Time]: 1

-> Warning notification is provided 1 hour before the scheduled end date and time (2011/01/19 16:00).

5. Click the [Save] button.

6. Finally, click the [Open] button on the Due Date detail screen to start the Due Date.

This finishes the warning notification setting.

7. Click the [End] button to stop using the Due Date.

The end date and time is automatically entered into "Actual End Date and Time".

The scheduled start date and time and end date and time can also be registered and shared in the calendar.

Refer to "Appendix.9 Calendar Registration" for the Calendar Registration procedure and how to display the calendar.

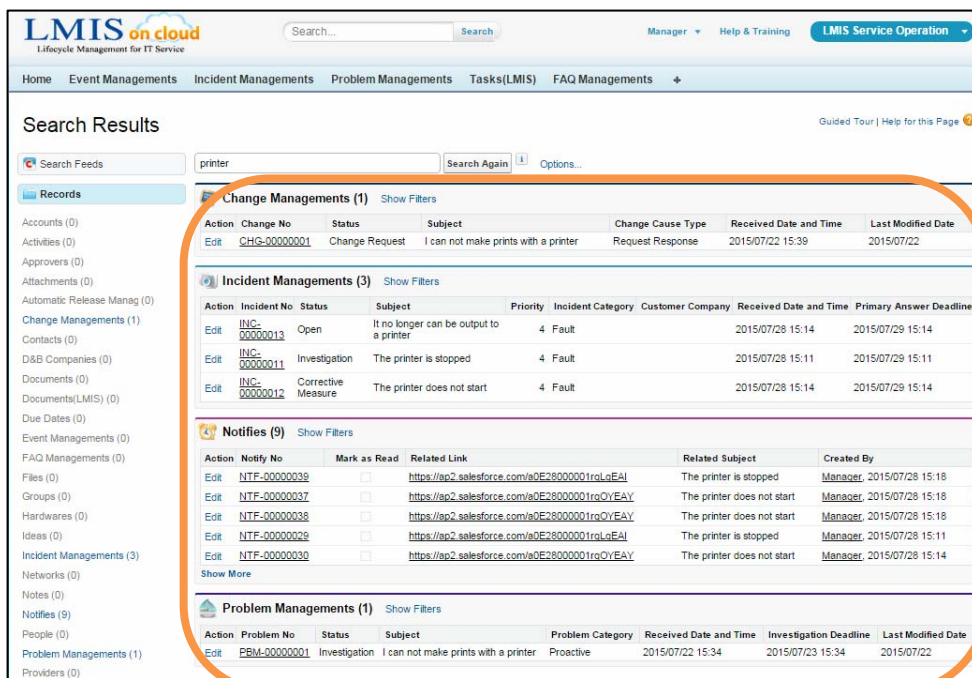
Appendix.4 Full-Text Search

This section provides an overview of the Full-Text Search. Full-Text Search is a function that searches for a particular text string within all of the registered records.

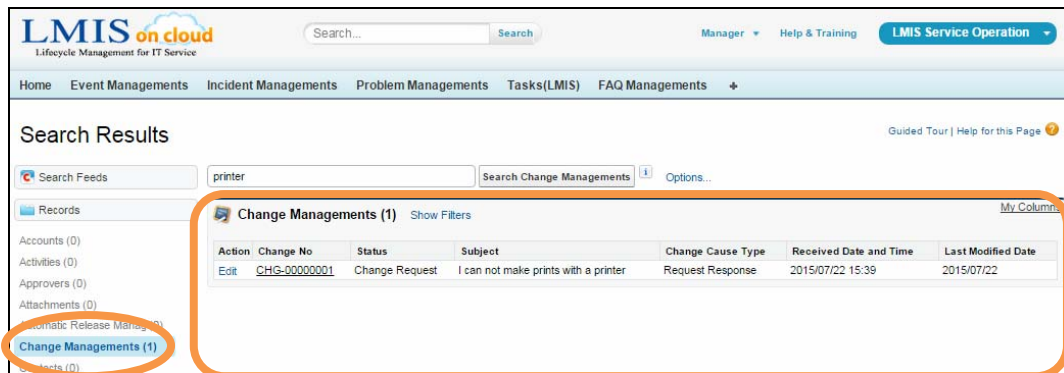
Appendix.4.1 How to Use (Header)

Use the search box located in the header as follows.

- 1. Enter the keyword to search for in the search box located in the Header.**
Use conditions such as the * (asterisk), ? (question mark), AND, OR, AND NOT, () (parentheses), "" (quotation marks) to refine the search results.
- 2. Click the [Search] button.**
The search results are displayed.



3. Select the record type displayed in the Sidebar to specify the object to search for.



Search Results

Search Feeds printer Search Change Managements Options..

Records

Change Managements (1) Show Filters My Columns

Action	Change No	Status	Subject	Change Cause Type	Received Date and Time	Last Modified Date
Edit	CHG-00000001	Change Request	I can not make prints with a printer	Request Response	2015/07/22 15:39	2015/07/22

4. Click [Options] to display the search options.



Search Results

Search Feeds printer

Options

Limit to items I own

Exact phrase

Save & Search

Check the [Limit to items I own] box to limit the results to only those records that you own.
 Check the [Exact phrase] box to exclude similar phrases from the search.

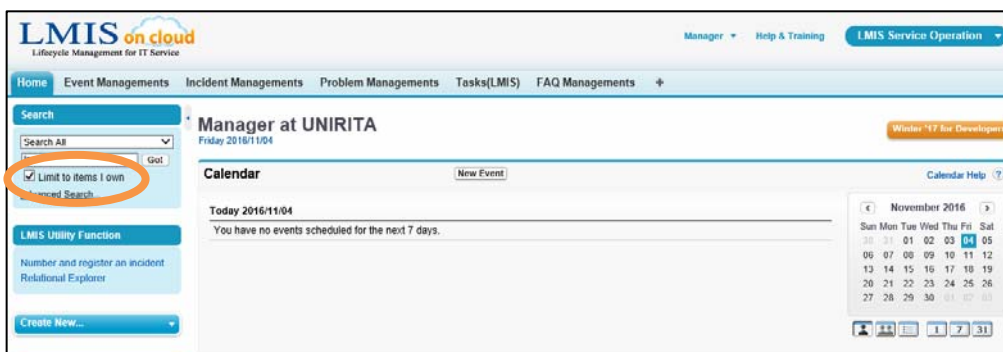
Appendix.4.2 How to Use (Sidebar)

Use the search box located in the Sidebar as follows.

1. Select the type of record from the dropdown list in the Sidebar search area.
2. Enter the keyword to search for.

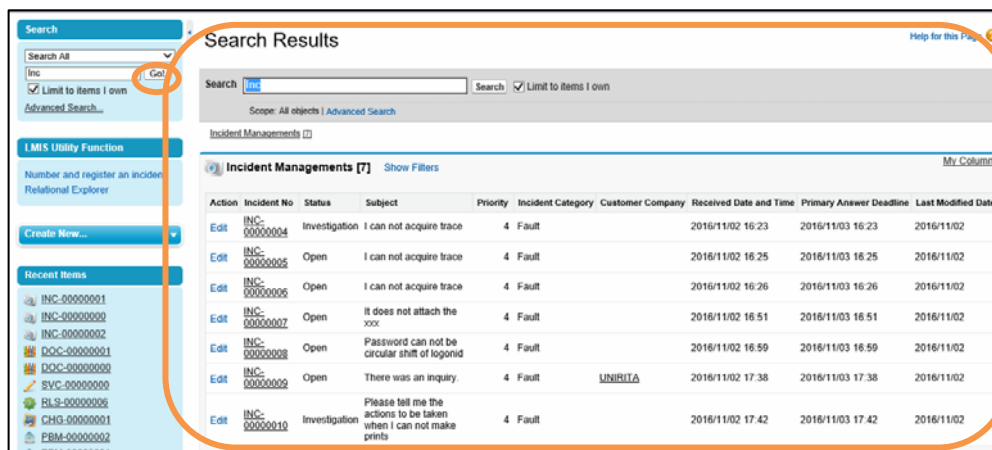
Use conditions such as the * (asterisk), ? (question mark), AND, OR, AND NOT, () (parentheses), "" (quotation marks) to refine the search results.

3. Check the [Limit to items I own] box to limit the results to only those records that you own.

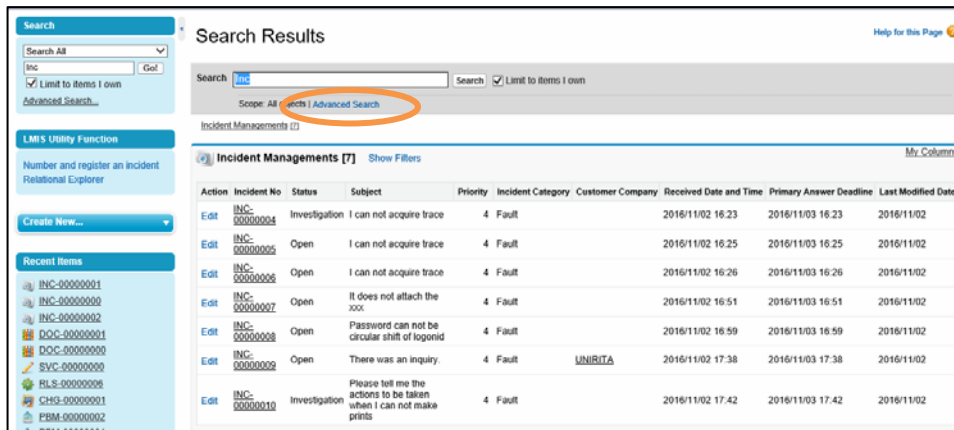


4. Click the [Go!] button.

The search results are displayed.

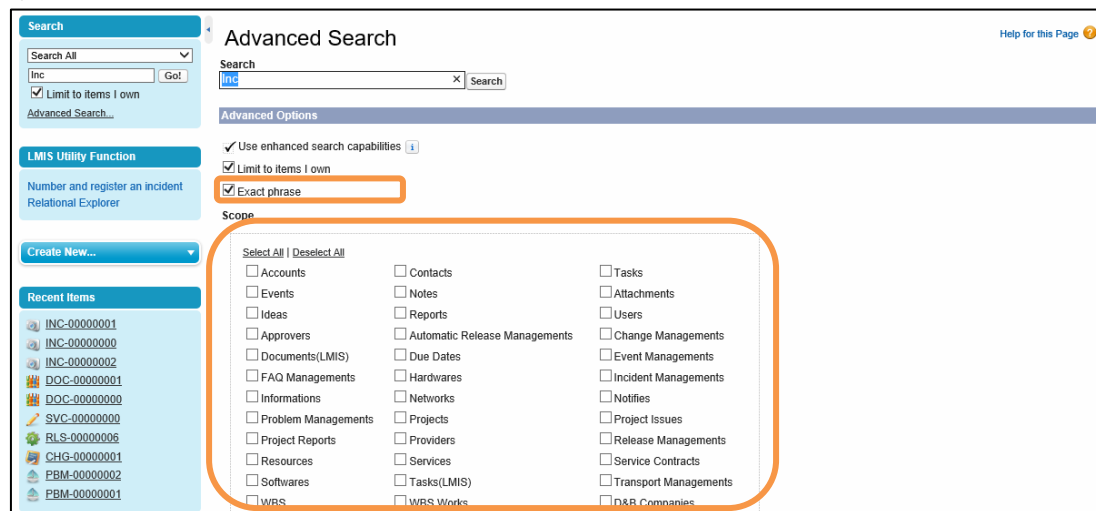


5. Click [Advanced Search] to specify more detailed search conditions.



The Advanced Search screen is displayed.

Check the [Exact phrase] box to exclude similar phrases from the search. Multiple record types can also be specified under [Scope].



Use the search options to select the range of objects to search for.

For more details, refer to the *Salesforce User Guide* in "Help & Training".

Appendix.5 Change Approver

This section explains the process to change the Approver. Use the following procedure to change the Approver who approves or rejects requests.

Appendix.5.1 How to Use

1. Display the detail screen of a record to change the Approver.

The screenshot shows a detail view for an approval record. It is divided into two main sections: 'Approval Information' and 'Control Information'.
 - **Approval Information:** Contains 'Approver' (set to 'Manager', circled in orange), 'Approval Date and Time', and 'Comment History'.
 - **Control Information:** Contains various settings such as 'Approver Decision Method' (N), 'Apply SLO' (ON), 'FAQ Candidate' (checkbox), 'Input Template' (checkbox), 'Easy Number' (checkbox), 'Email Notification' (ON), 'Lock When Closed' (ON), 'Awaiting Task Completion' (OFF), 'Email to Customer' (checkbox), and 'Calendar Registration' (ON).

2. Click the [Edit] button and change the [Approver] item.

This screenshot is identical to the previous one, but the 'Approver' field in the 'Approval Information' section has been updated to 'Manager 2' and is circled in orange.

The entered content is updated in the detail screen.

3. Click the [Save] button.

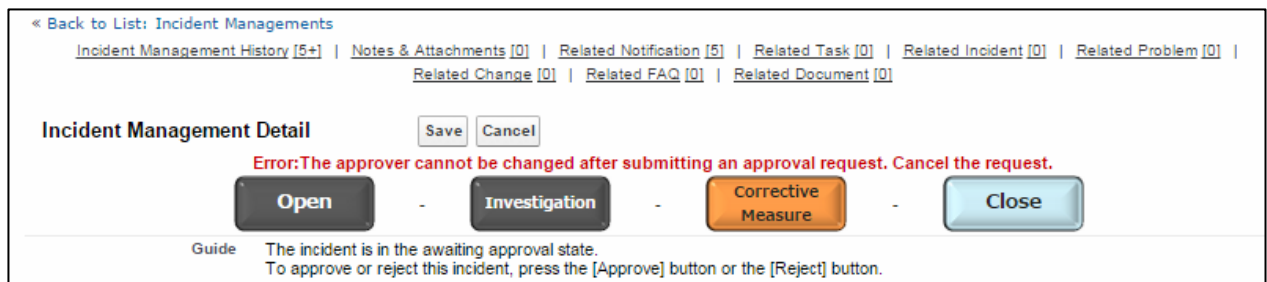
The Approver has been changed.

A message is sent to the portal of the user specified as the new Approver.

The screenshot shows a 'My Notifications' interface. At the top, there are buttons for 'Batch Delete', 'Batch Mark as Read', and 'Switch to Task List'. Below is a table of notifications with columns for 'Action', 'Related Link', 'Details', and 'Related Subject'.
 - **Action:** Includes 'Acti: Mark as Read' and 'Edit'.
 - **Related Link:** Contains a URL: <https://ap2.salesforce.com/a0E2800000...>
 - **Details:** Contains the message: 'The incident approval request has been submitted. Check the details and approve or reject it.' This entire row is circled in orange.
 - **Related Subject:** Contains the text: 'The printer is stopped'.

Caution

- If there are multiple Approvers, edit each one in the same way.
- The Approver can also be changed in the same way by editing the [Change Request Approver] only during the change request status of the Change Management process.
- Edit privileges are required for the target Approver.
- If the Approver is changed during an Approval Request, the following error message is displayed and cannot be executed.



In this case, change the Approver after performing a Request Cancellation.

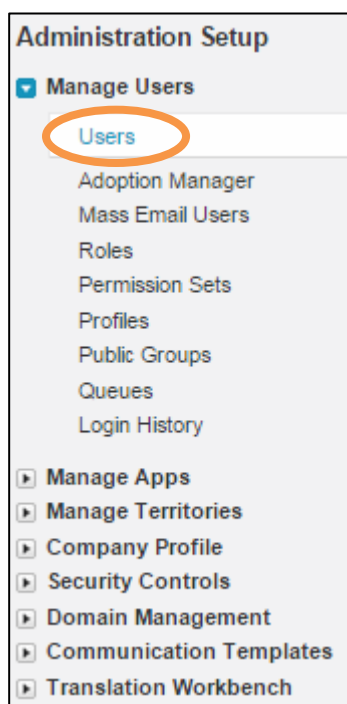
Appendix.6 Delegated Approval

A Delegated Approver can be set for a user.

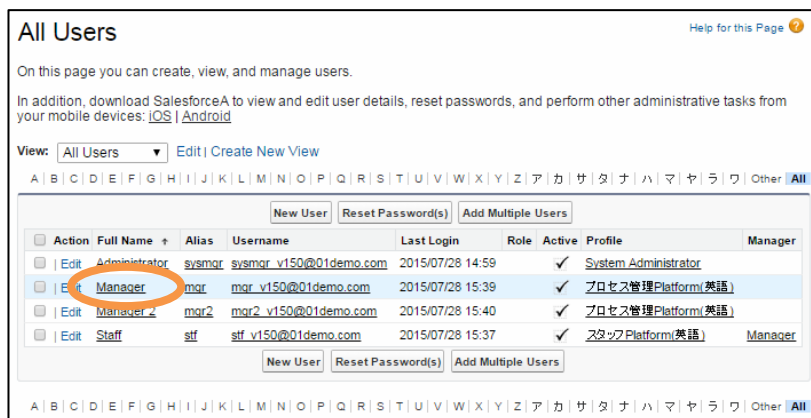
If a Delegated Approver is set, then notification is sent to both the Approver (user) and the Delegated Approver when an Approval Request is made, and the Delegated Approver can approve or reject the request in the same manner.

Appendix.6.1 How to Use

1. Click [Administration Setup]-[Manage Users]-[Users] on the settings screen.



2. Click the user to set as the Delegated Approver.



3. Click the [Edit] button.

User Help for this Page ?

Manager

[Permission Set Assignments \[0\]](#) |
 [Permission Set License Assignments \[0\]](#) |
 [Personal Groups \[0\]](#) |
 [Public Group Membership \[1\]](#) |
 [Queue Membership \[1\]](#) |
 [Team \[1\]](#) |
 [Managers in the Role Hierarchy \[0\]](#) |
 [OAuth Connected Apps \[0\]](#) |
 [Third-Party Account Links \[0\]](#) |
 [Installed Mobile Apps \[0\]](#) |
 [Authentication Settings for External Systems \[0\]](#) |
 [User Provisioning Accounts \[0\]](#)

User Detail

Edit
Change Password

Name	Manager	Role	
Alias	mgr	User License	Salesforce Platform
Email	lmis_english@sample.com	Profile	プロセス管理Platform(英語)
Username	mgr_v150@01demo.com	Marketing User	<input type="checkbox"/>
Nickname	mgr i	Offline User	<input type="checkbox"/>

4. The user edit screen is displayed.

User Edit

Manager

User Edit Save Cancel

General Information

Last Name	<input type="text" value="Manager"/>	Role	
First Name	<input type="text"/>	User License	Salesforce Platform
Alias	<input type="text" value="mgr"/>	Profile	プロセス管理Platform(英語)
Email	<input type="text" value="lmis.english@sample.com"/>	Active	<input checked="" type="checkbox"/>
Username	<input type="text" value="mgr_v150@01demo.com"/>	Marketing User	<input type="checkbox"/>
Nickname	<input type="text" value="mgr"/> i	Offline User	<input type="checkbox"/>

5. Click the [Lookup] button in the [Delegated Approver] item to display the search screen.

Additional Information

Delegated Approval Period From [2015/08/26 16:07]

Delegated Approval Period To [2015/08/26 16:07]

Locale Settings

Time Zone

Locale

Language

Approver Settings

Delegated Approver 🔍

Manager 🔍

Receive Approval Request Emails

6. Select the user to set as the Delegated Approver.

Lookup

Search...

You can use "*" as a wildcard next to other characters to improve your search results.

Recently Viewed Users

Full Name	Role
Administrator	
Manager 2	
Staff	

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7. To set the period of validity for the Delegated Approver, set [Delegated Approval Period From] and [Delegated Approval Period To].

Additional Information

Delegated Approval Period From: [2015/08/26 16:07]

Delegated Approval Period To: [2015/08/26 16:07]

Locale Settings

Time Zone:

Locale:

Language:

Approver Settings

Delegated Approver:

Manager:

Receive Approval Request Emails:

salesforce.com Newsletter Settings

Receive the salesforce.com newsletter

Receive the salesforce.com administrator newsletter

The settings and the period of validity for the Delegated Approver are as shown in the following table.

Setting		Delegated Approval Validity Period
Delegated Approval Period From	Delegated Approval Period To	
Specified	Specified	From the date specified in Delegated Approval Period From Up to the date specified in Delegated Approval Period To
Unspecified	Unspecified	Invalid. Delegated approval is not used even if a Delegated Approver is set.
Specified	Unspecified	From the date specified in Delegated Approval Period From (including that date)
Unspecified	Specified	Up to the date specified in Delegated Approval Period To (including that date)

8. Click the [Save] button.

The following message is displayed in the [Approver Information] comment history when the Delegated Approver grants approval.

▼ Approval Information			
Approver	Manager	Approval Date and Time	2015/08/27 11:49
Comment History	2015/08/27 11:49 Manager 2	Corrective Measure	Approve(Delegated) : Approve

This completes the Delegated Approver setting.

Appendix.7 Email Approval

The Email Approval function can approve/reject a request by replying to an Approval Request Email Notification. The content of the Email reply is saved as the activity history in the corresponding record.

This chapter explains how to use the Email Approval function.

For details on how to setup the Email Approval function, refer to the "LMIS on cloud コンフィグレーションガイド".

Appendix.7.1 How to Use

1. Display the reply screen for the Approval Request Email.

Caution

Do not change the Email subject. The approval process cannot be performed if it is changed.

2. Describe the result in the Email body.

Enter one of the following strings (approval keywords) in the line of the Email body specified in the Email integrated setting file.

- ▶ To approve: Approve, OK
- ▶ To reject: Reject, NG, Dismiss

If the value of the line specified in the Email integrated setting file matches an approval keyword, then it is recognized as an approval or rejection. Approval or rejection is not issued if the line does not match an approval keyword.

In either case, the content of the Email reply is saved as the activity history.

3. Enter the comment in the Email body.

Enter a comment regarding the approval or rejection in the Email body on the line specified in the Email integrated setting file. If the comment is omitted, then "No Comment" is registered.

4. Send the Email.

The content of the sent email is as follows.

In this example, the first line is set as the approval keyword and the third line is the approval comment.

Destination:	mailappinc@w-35st...
Subject:	Re: LMIS Email Notification [INC-00000015]...
Body:	First line Approve
	Second line (blank)
	Third line Approved.
	...

The mail subject cannot be changed.

5. Browse the target object and confirm the result.

Using the previous procedure as an example, with the Incident Management information approved by Email, confirm that the status is "Close".

The screenshot displays the Incident Management system interface for incident INC-00000006. The page title is "Incident Management" and the incident ID is "INC-00000006". There are navigation links for "Back to List: Documents(LMIS)", "Incident Management History (5+)", "Notes & Attachments", "Related Notification", "Related Task", "Related Incident", "Related Problem", "Related Change", "Related FAQ", and "Related Document". The "Incident Management Detail" section includes buttons for "Edit", "Investigation Start", "Start Corrective Measure", "Approval Request", "Request Cancellation", "Approve", "Reject", "Problem Registration", "Change Registration", "Register Copy", "Calendar Registration", "Relational Explorer", and "FAQ Registration". Below these buttons are four large buttons: "Open", "Investigation", "Corrective Measure", and "Close". A "Guide" section at the bottom states "This incident has been closed."

The Email approval result and comment are displayed in [Related Notification].

The content of the Email reply is also saved as the activity history in the corresponding record.

Activity History		Log a Call	Mail Merge	Send an Email	View All	Activity History Help ?			
Action	Subject	Name	Task	Due Date	Assigned To	Last Modified Date/Time			
Edit	Del Re: LMSメール通知 (LMS Email Notification) [INC-0000017: How to use the data registration utility]		✓	2015/07/29	Administrator	2015/07/29 17:39			

Related Notification		New Notify		Related Notification Help ?		
Action	Mark as Read	Notify No	Details	Related Subject	Created By	
Edit	<input type="checkbox"/>	NTF-0000060	The incident corrective measure has been started.	How to use the data registration utility	Manager , 2015/07/29 16:20	
Edit	<input type="checkbox"/>	NTF-0000061	The incident approval request has been submitted. Check the details and approve or reject it.	How to use the data registration utility	Manager , 2015/07/29 16:26	
Edit	<input type="checkbox"/>	NTF-0000062	The incident approval request has been submitted. Check the details and approve or reject it.	How to use the data registration utility	Manager , 2015/07/29 16:26	
Edit	<input type="checkbox"/>	NTF-0000063	The incident has been closed. Comment:OK	How to use the data registration utility	Administrator , 2015/07/29 16:43	

The Email approval work is complete.

Caution

Email approval for a Contact can only be implemented when the Approver of the target record matches the Approval User.

Appendix.8 Relational Explorer

This section provides an overview and explains how to use the Relational Explorer

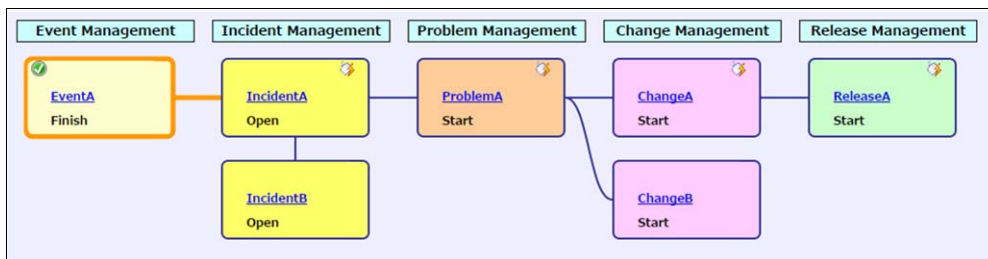
Appendix.8.1 Basic Description

◆ Overview of the Relational Explorer

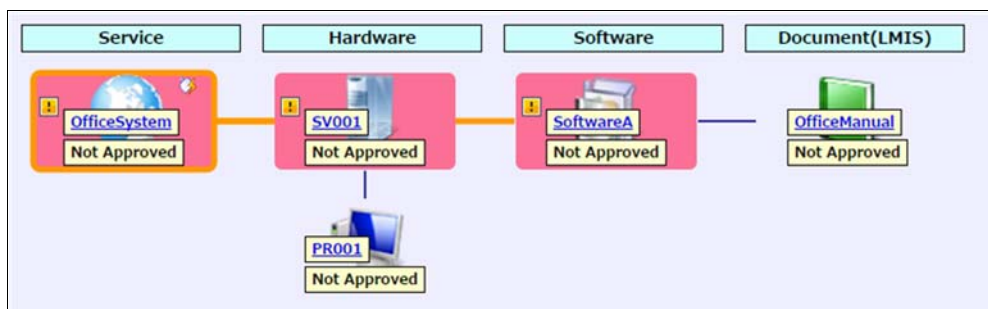
This section explains the Relational Explorer function overview and screen.

With the Relational Explorer you can visually display process information, which is information registered during various processes (such as events, incidents, problems, changes, and release processes), as well as configuration information. You can use four different display formats (Landscape Display, Portrait Display, Hierarchy Display, and Star-shaped Display). You can also see impact display results for incidents, services, hardware, software, and networks.

- Process information *Landscape display format

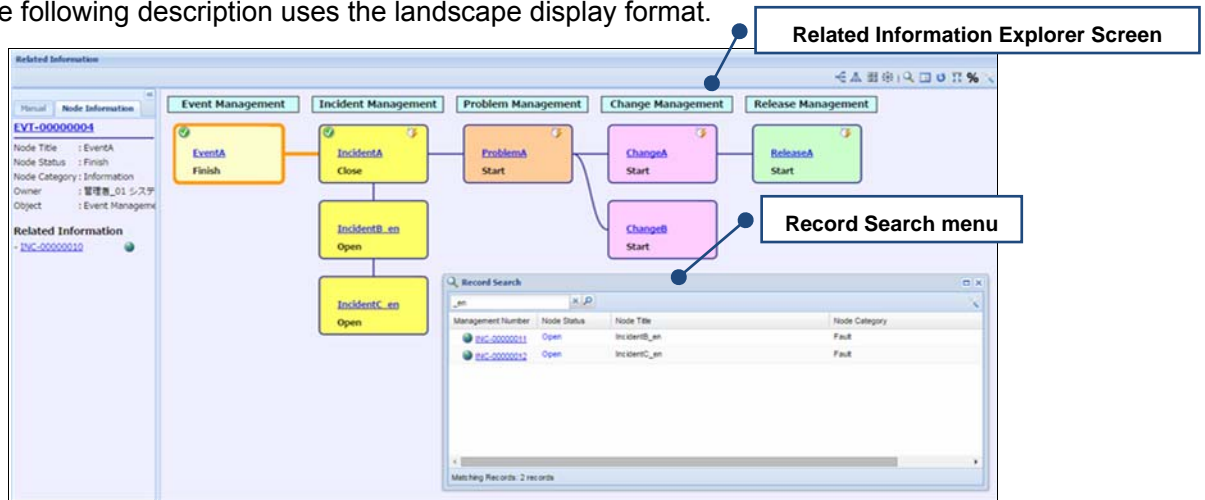


- Configuration information *Landscape display format



Two types of screens are used in the Relational Explorer to display records.

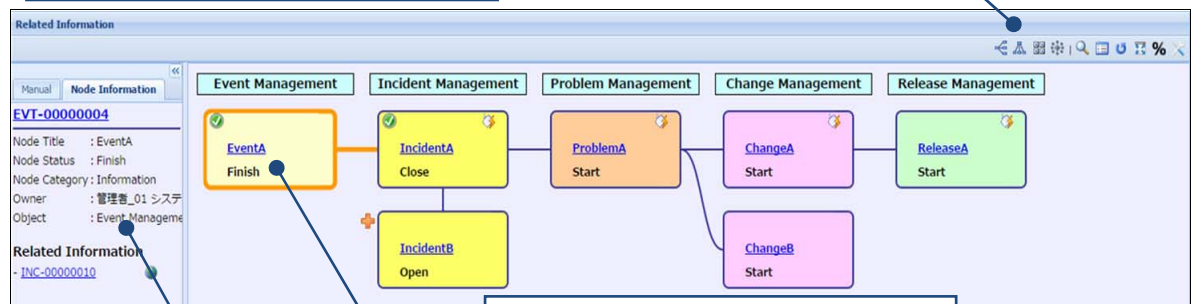
The following description uses the landscape display format.



- Relational Explorer Screen

This screen displays the records related to a record in a chart format and visually expresses the relations between records.

Relational Explorer Menu
 Click the icon in the menu to change the display format or settings of the Related Information Explorer screen, or use the search, update, or other functions.



Relational Explorerchart
 The relationship diagram for related records is displayed in chart format.

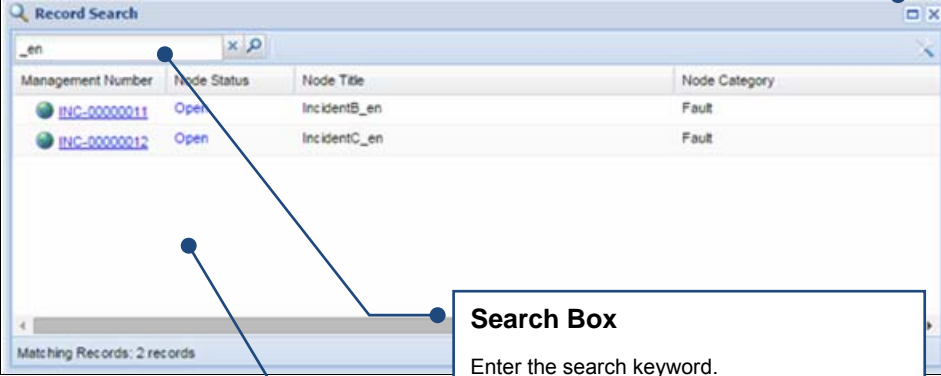
Sidebar
 Relational Explorer on the selected node appears.

•"Record Search" screen

This is the Record Search screen. Assign search conditions to narrow the search.

Record Search menu

Click the icon on the right-side of the menu to enter the "Record Search" screen settings.



Search Box

Enter the search keyword.

Search result

Display the search result.

Management Number	Node Status	Node Title	Node Category
INC-00000011	Open	IncidentB_en	Fault
INC-00000012	Open	IncidentC_en	Fault

Matching Records: 2 records

◆ **Display format and content**

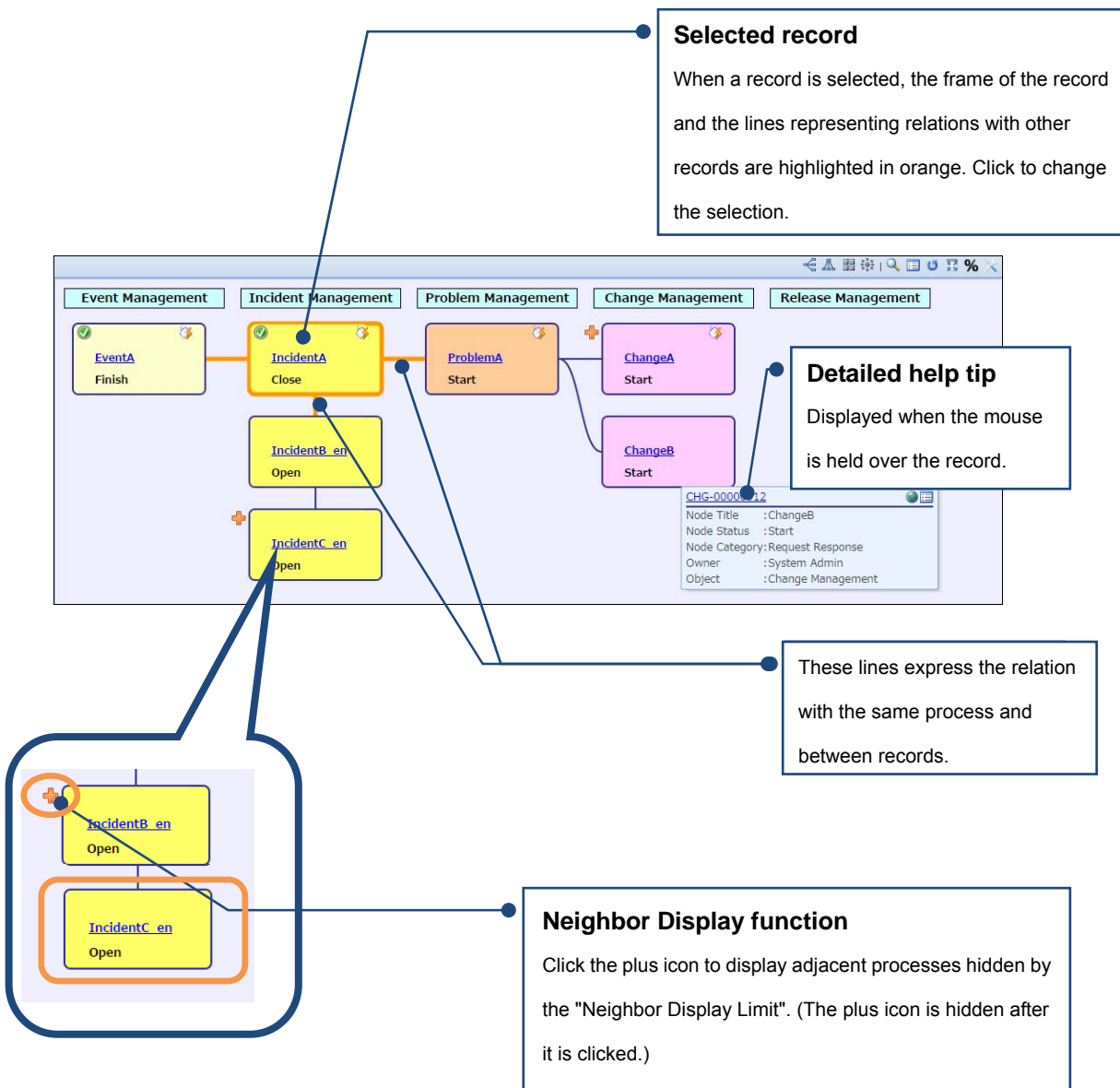
This section describes the four display formats of the Relational Explorer as well as its content.

Refer to "Appendix.8.2 How to Use" for more information on switching between screens.

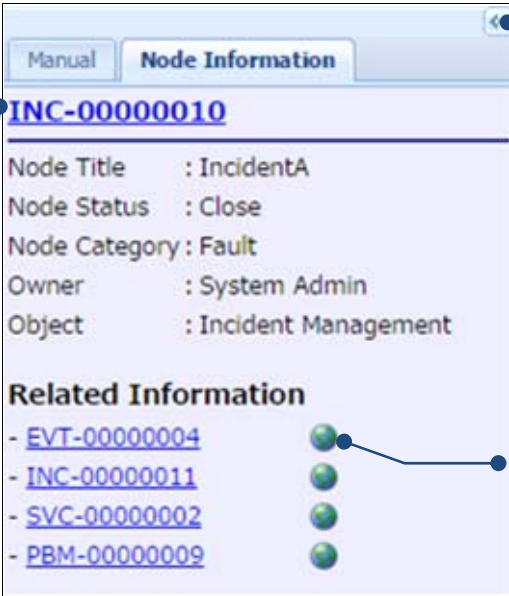
*Every display format allows you to change the position of records by dragging and dropping.

- Landscape Display Screen of Relational Explorer

Displays process and configuration information in a landscape view. Objects such as events and incidents appear in columns and their corresponding records appear in the rows.



- Landscape Display Screen (Sidebar: Node Information tab)
Displays the related information of the selected node.



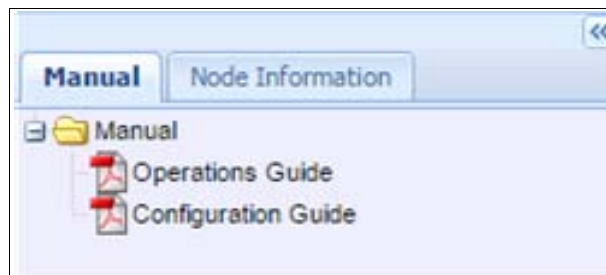
The screenshot shows a sidebar with two tabs: "Manual" and "Node Information". The "Node Information" tab is active, displaying details for node **INC-00000010**. The details include: Node Title: IncidentA, Node Status: Close, Node Category: Fault, Owner: System Admin, and Object: Incident Management. Below this is a "Related Information" section with four links: [EVT-00000004](#), [INC-00000011](#), [SVC-00000002](#), and [PBM-00000009](#). Each link has a small globe icon to its right.

Click this to collapse the sidebar.

Click the Management Number link to display the record detail screen.

Display Related Information
Click the globe icon to update the chart with the selected record.

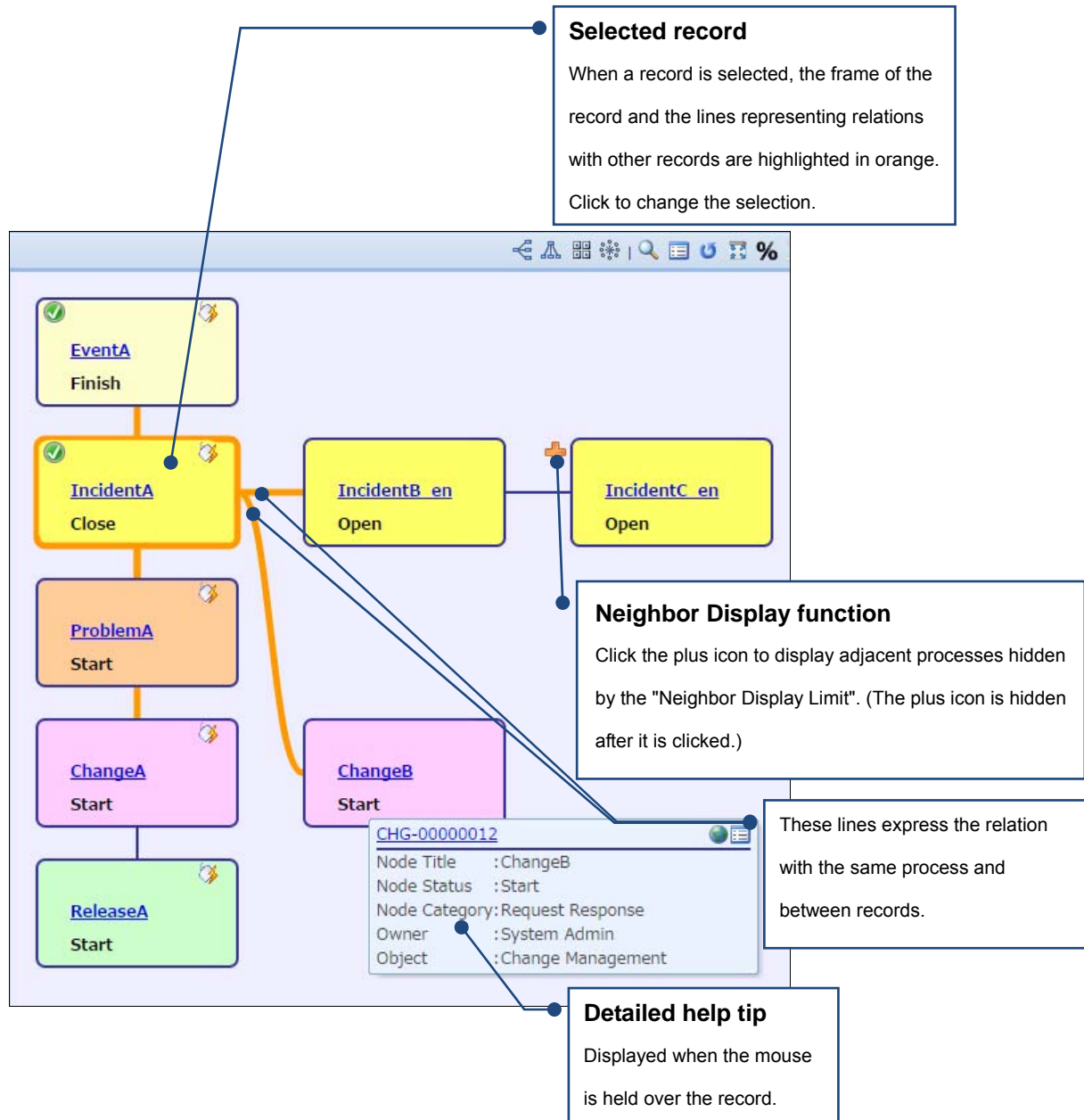
- Landscape Display Screen (Sidebar: Manuals tab)
Displays links to related manuals.



- Portrait Display Screen of Relational Explorer

Displays process and configuration information in a portrait view. Objects such as events and incidents appear in rows and their corresponding records appear in columns.

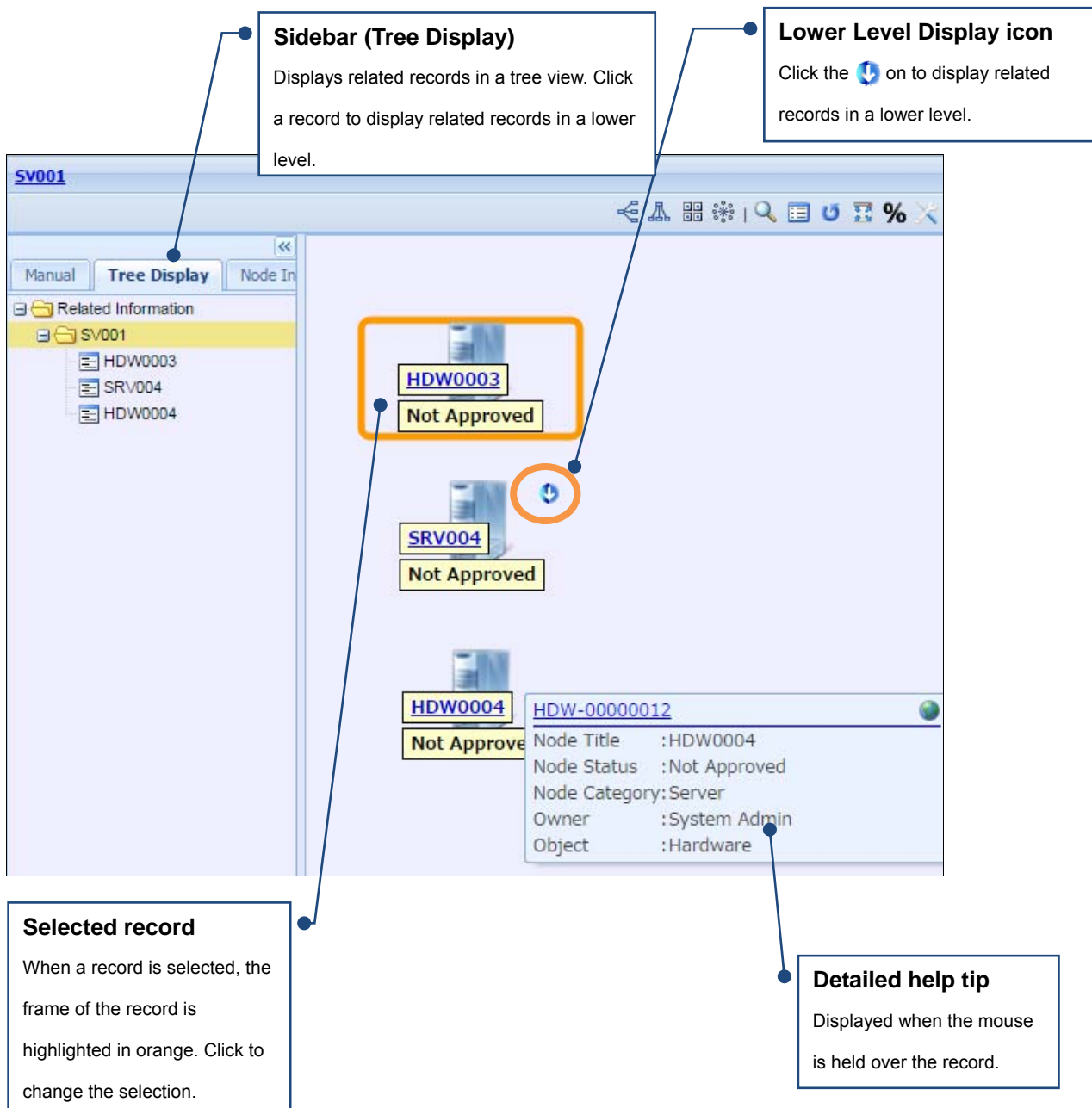
*The sidebar and screen icons appear in the same way as in the landscape display.



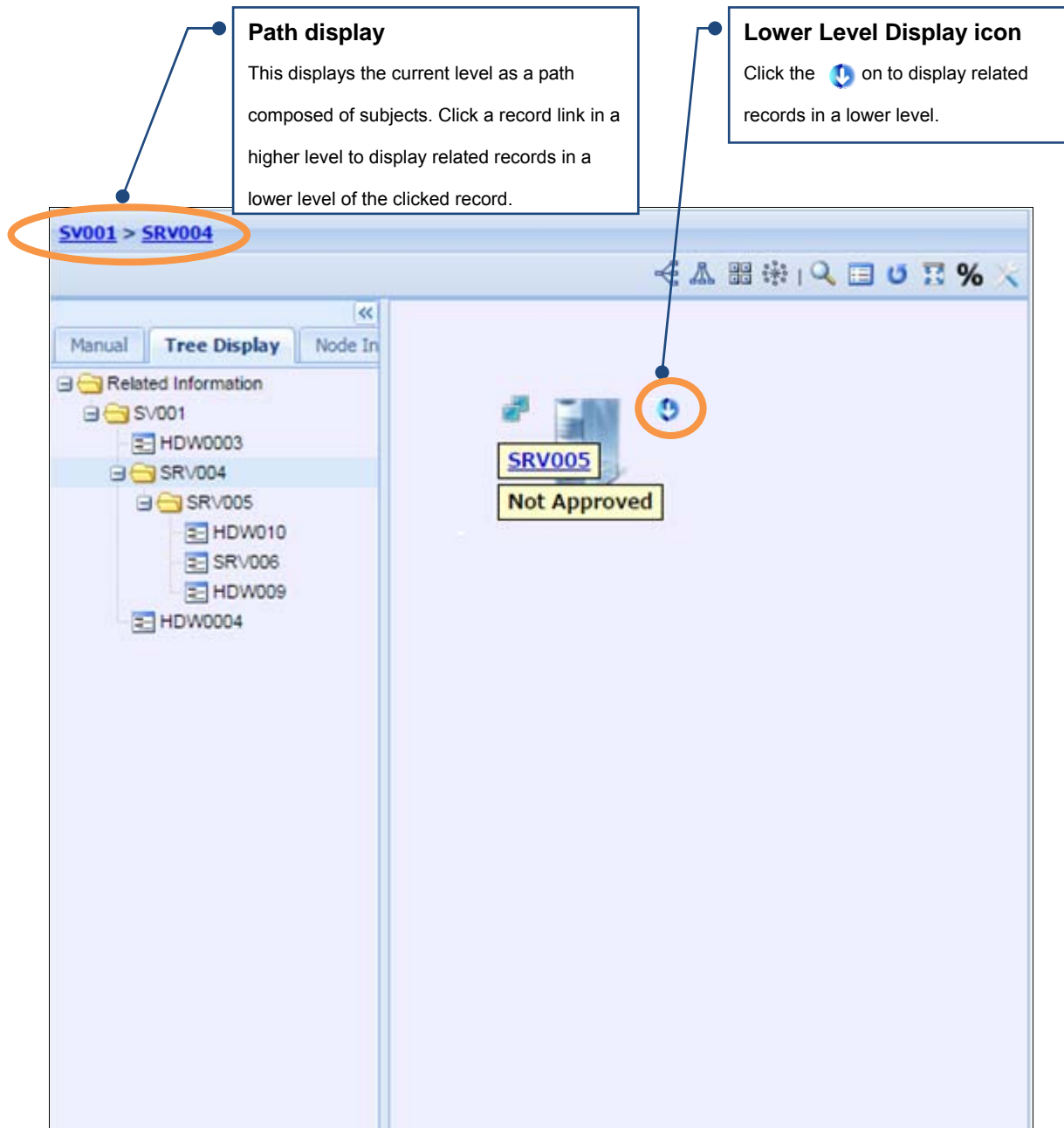
• Hierarchy Display Screen

Displays process and configuration information in a hierarchy view. Objects such as events and incidents appear in columns and their corresponding records appear in the rows.

The following figure is a hierarchy display showing records related to a server rack (SV001). A list of physical servers mounted in the rack appears.



Click the [Lower Level Display] icon to display related records in a lower level. The following figure shows a screen that appears after you click the [Lower Level Display] icon for a physical server (SRV-004) mounted in the rack. A list of virtual servers configured in the physical server appears.



Similarly, click the [Lower Level Display] icon for a virtual server (SRV005) to display records in a lower level that are related to the virtual server.

*Clicking the [Lower Level Display] icon navigates you down by just one level.

*The hierarchy display does not have the Neighbor Display function.

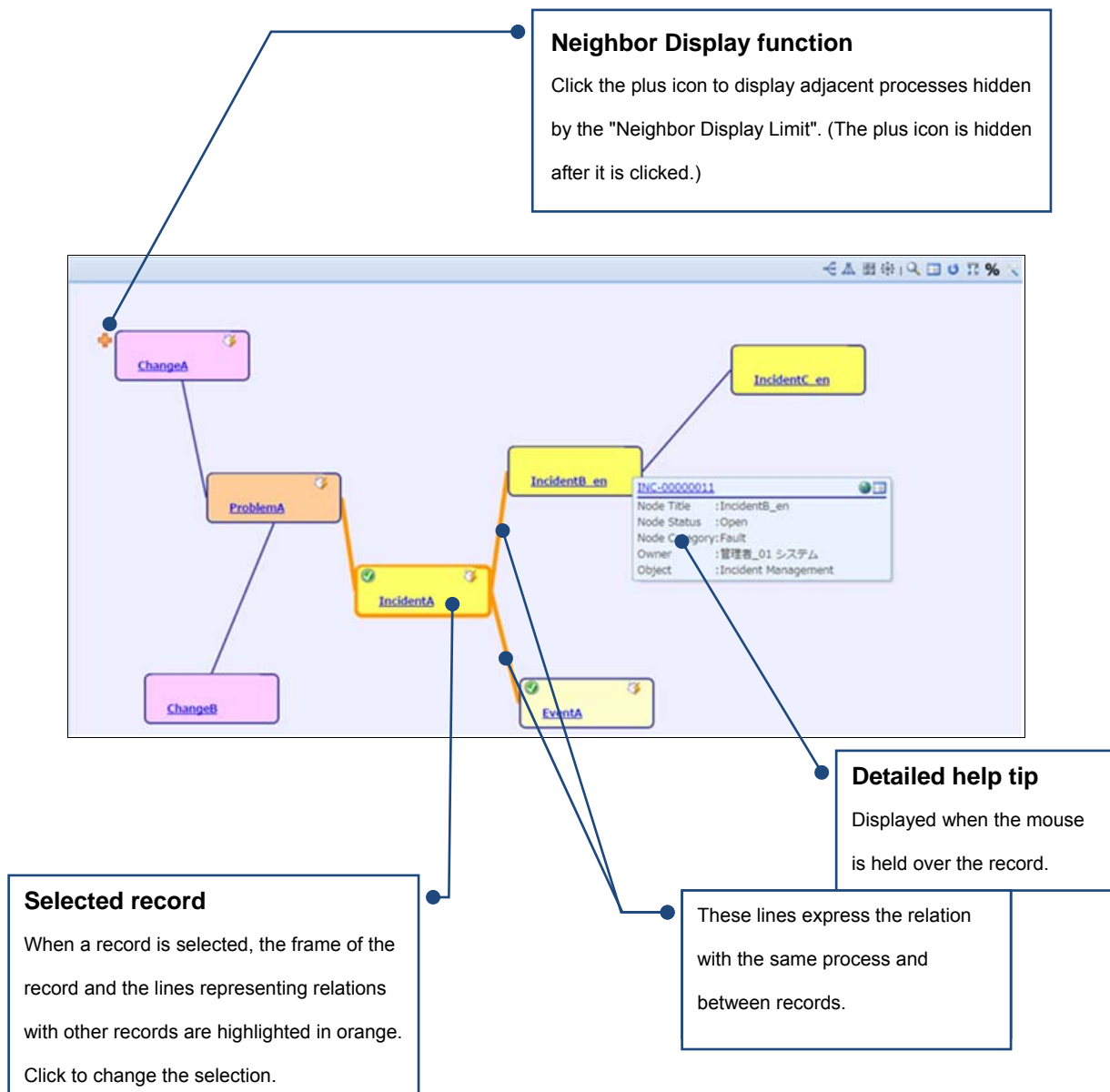
*The hierarchy display does not display N:N related records.

- Star-shaped Display Screen

Displays process and configuration information in a star view.

*The sidebar and screen icons appear in the same way as in the landscape display.

*By default only for the star-shaped display, the status does not appear as a text label on the node.



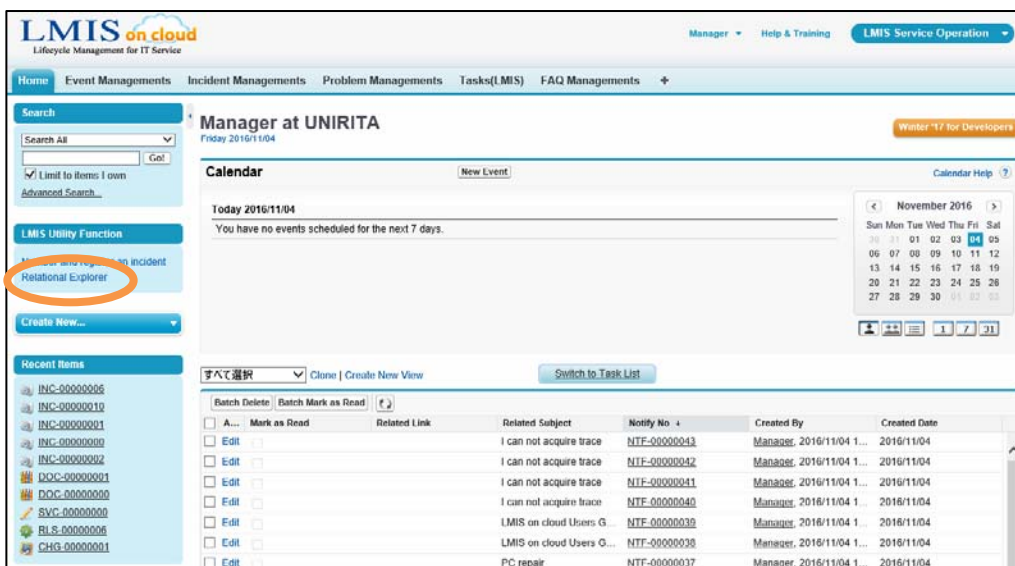
Appendix.8.2 How to Use

This section explains the operations to launch, display, and search the Relational Explorer.

◆ Launching the Relational Explorer

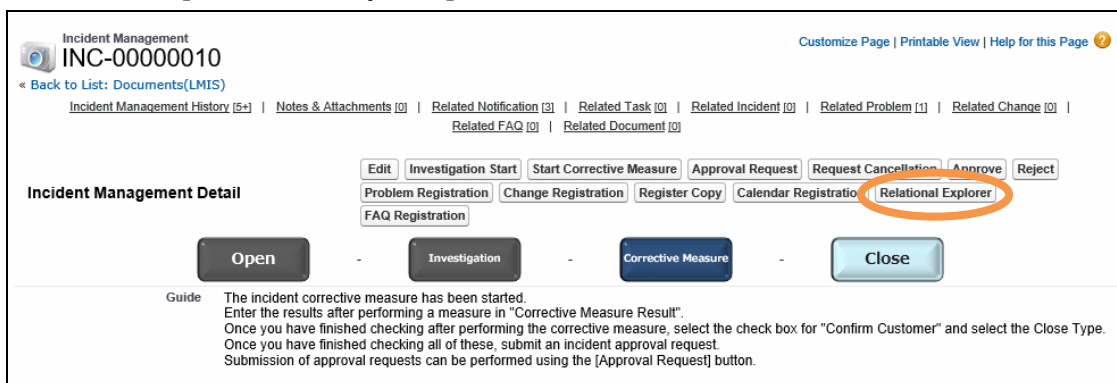
Launch the Relational Explorer. There are two ways to launch the Related Information Explorer.

- Click the [LMIS Utility Function]-[Relational Explorer] in the Sidebar.



The "Record Search" screen is displayed together with the launch of the Relational Explorer. The following example searches for a record and displays a chart.

- Click the [Relational Explorer] button on the record detail screen.



A chart centered on this record is displayed when the Relational Explorer launches.

◆ Display Relational Explorer

- Process Information display

1. **Open the Process Information detail screen.**
2. **Click the [Relational Explorer] button.**

The Relational Explorer launches and a chart centering on the selected record is displayed.

- Configuration Information display

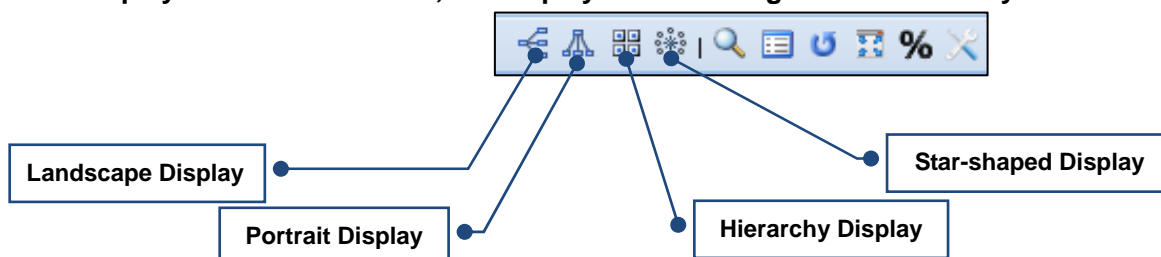
3. **Open the Configuration Information detail screen.**
4. **Click the [Relational Explorer] button.**

The Relational Explorer launches and a chart centering on the selected record is displayed.



◆ Changing the Display Format

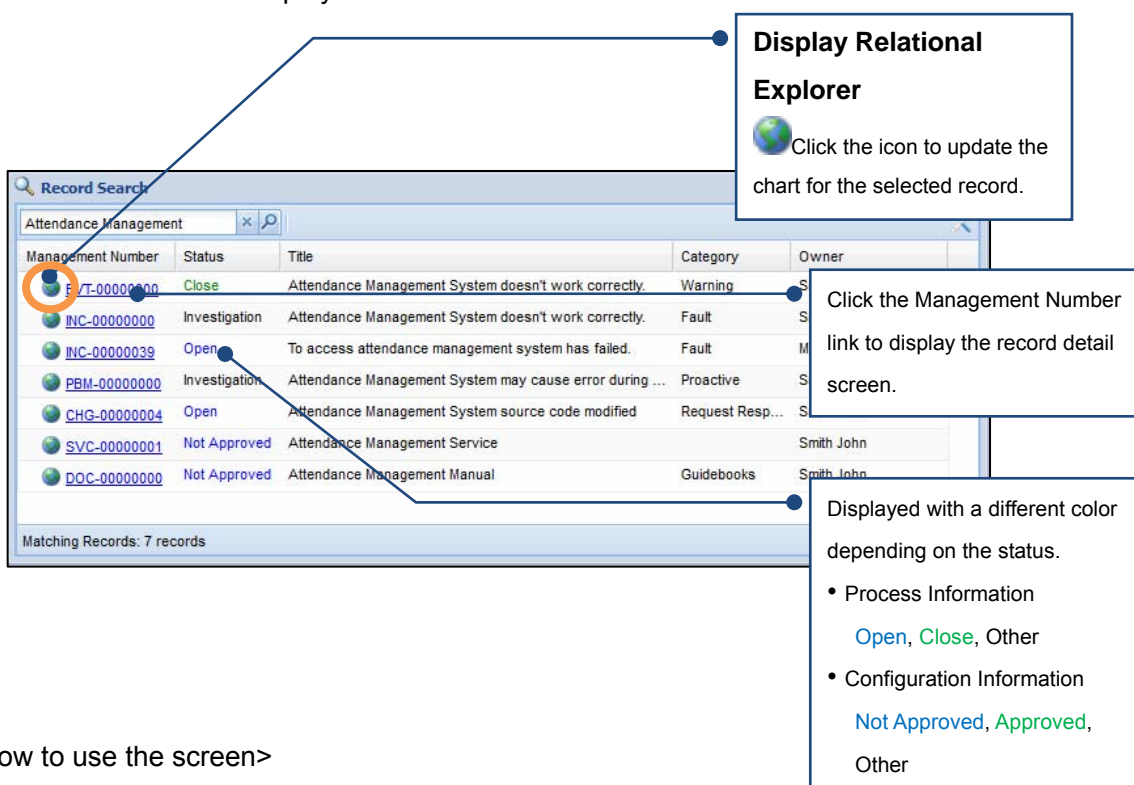
You can change the display format of Relational Explorer

1. **Launch the Relational Explorer**
2. **From the [Relational Explorer] menu at the top of the screen, click one of the following display format icons. Then, the display format changes to the format you selected.**



◆ **Searching for Relational Explorer**

1. **Click the Relational Explorer menu's  record search icon.**
The "Record Search" screen is displayed.
2. **Enter the keyword to search for (the keyword must be 2 or more characters).**
Use conditions such as the * (asterisk), ? (question mark), AND, OR, AND NOT, () (parentheses), "" (quotation marks) to refine the search results.
You can also specify the Management Number (record ID) and other items to search for.
Use a wildcard to search for multiple record IDs.
3. ** Click the Search button.**
The search results are displayed.



Display Relational Explorer
Click the icon to update the chart for the selected record.

Click the Management Number link to display the record detail screen.

Displayed with a different color depending on the status.

- Process Information
Open, Close, Other
- Configuration Information
Not Approved, Approved, Other

Management Number	Status	Title	Category	Owner
FYT-00000000	Close	Attendance Management System doesn't work correctly.	Warning	Smith John
INC-00000000	Investigation	Attendance Management System doesn't work correctly.	Fault	Smith John
INC-00000039	Open	To access attendance management system has failed.	Fault	Smith John
PBM-00000000	Investigation	Attendance Management System may cause error during ...	Proactive	Smith John
CHG-00000004	Open	Attendance Management System source code modified	Request Resp...	Smith John
SVC-00000001	Not Approved	Attendance Management Service		Smith John
DOC-00000000	Not Approved	Attendance Management Manual	Guidebooks	Smith John

Matching Records: 7 records

<How to use the screen>

- Click the [x] button to close the screen.
- Click the header field name to sort the records by ascending or descending order.
- Drag and drop the header field names to change the order of each field column.
- When the record search screen is displayed again, it will show the previously searched keyword.

Caution

- The occurrence of the following error likely indicates that the number of relations displayed for each object exceeds the limit.

SOQL statements cannot query more than 35 different parent types.

**Error is in expression '{!doSearchRelation}' in page smoc:ox_page_relexplore:
(SMOC)**

An unexpected error has occurred. Your solution provider has been notified. (SMOC)

This error occurs when the following condition is true:

An object is configured to display 35 or more child relations of the object. (Child relationships represent relationships in which the "xxxx" portion of "xxxx: Related OO" matches the configured object.)

Ex.) When you configure an Event Management object, the child relations include the following:

- ✧ Event Management: Related Event
- ✧ Event Management: Related Service
- ✧ Event Management: Related Software
- ✧ Event Management: Related Hardware

Detailed Settings for Each Object

Object to be Set
Event Management

Display Objects Screen
Displays on the Process Information

Undisplayed Relation

Display Relation


- Related Object:N:N Relation
- Problem Management:Related Event
- Incident Management:Related Event
- Event Management:Related Event
- Document(LMIS):Related Event
- Change Management:Related Event
- Event Management:Related Hardware
- Event Management:Related Service
- Event Management:Related Software

If an error shown above occurs, from the [Relational Explorer] screen settings, change the settings to display fewer relations, and then retry.

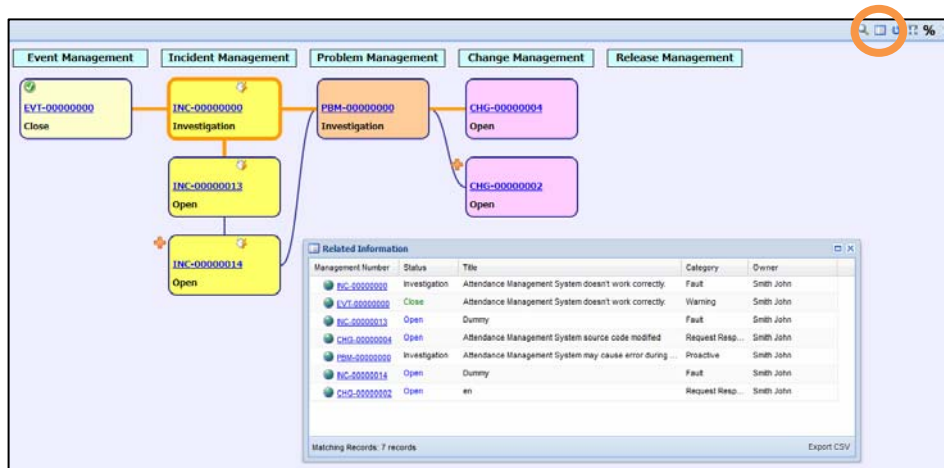
Refer to "Appendix.8.3 Changing the Screen Settings" for more information on the Relational Explorer screen settings.

◆ **Display the list of Related Information**

Display the records shown in the chart as a list.

1. Click the **Display Related Information List icon**  in the **Related Information Explorer** menu.

The "Related Information" screen is displayed.



This detailed screenshot shows the 'Related Information' table with several callout boxes:

- Display Related Information:** Click the icon to update the chart for the selected record. (Points to the globe icon in the table header)
- Click the Management Number link to display the record detail screen.** (Points to the management number links in the table)
- Displayed with a different color depending on the status:**
 - Process Information: Open, Close, Other
 - Configuration Information: Not Approved, Approved, Other
- Click Export CSV to output the Related Information content as a CSV file** (Points to the 'Export CSV' button at the bottom right)


Management Number	Status	Title	Category	Owner
INC-00000000	Investigation	Attendance Management System doesn't work correctly.	Fault	Smith John
EVT-00000000	Close	Attendance Management System doesn't work correctly.	Warning	Smith John
INC-00000013	Open	Dummy	Fault	Smith John
CHG-00000004	Open	Attendance Management System source code modified	Request Resp...	Smith John
PBM-00000000	Investigation	Attendance Management System may cause error during ...	Proactive	Smith John
INC-00000014	Open	Dummy	Fault	Smith John
CHG-00000002	Open	en	Request Resp...	Smith John

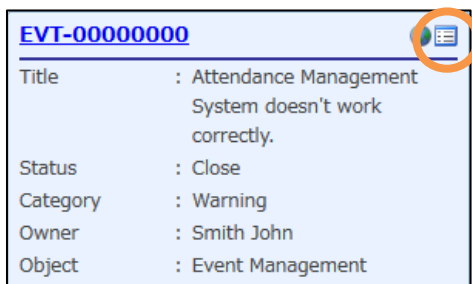
<How to use the screen>

- Click the [x] button to close the screen.
- Click the header field name to sort the records by ascending or descending order.
- Drag and drop the header field names to change the order of each field column.

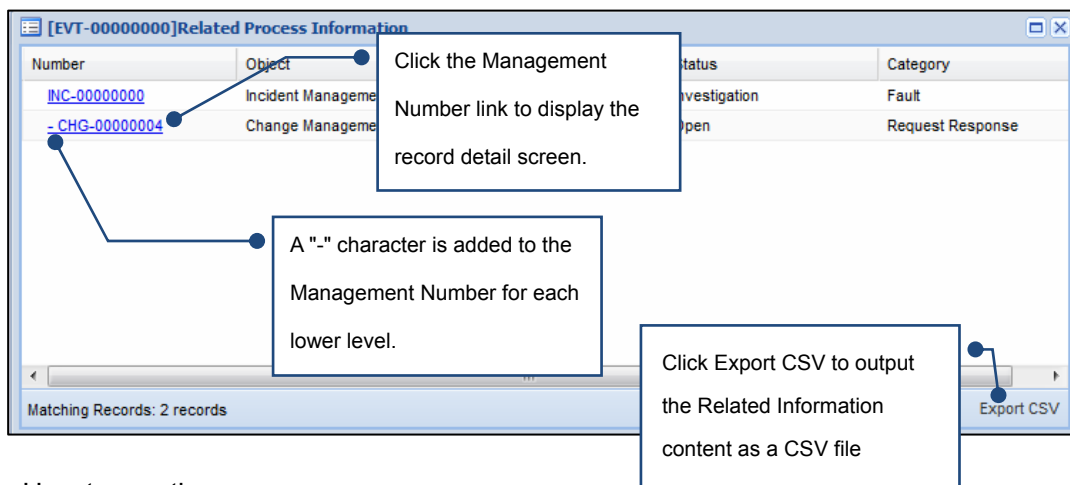
◆ **Display a list of the child record information related to the Process Information**

Display the child and grandchild records relating to the desired Process Information in a hierarchical list format.

1. Hold the mouse cursor over the Process Information node in the Relational Explorer screen to display the detailed help tip.
2. From the detailed help tip, click the display icon  for the related lower level Process Information.



The "Related Process Information" screen is displayed.



<How to use the screen>

- Click the [x] button to close the screen.
- Click the header field name to sort the records by ascending or descending order.
- Drag and drop the header field names to change the order of each field column.

The objects displayed in the child record information list are as shown in the table below.

Parent object	Child record object for display
Event Management	Event Management Incident Management Problem Management Change Management Task(LMIS)
Incident Management	Incident Management Change Management Task(LMIS)
Problem Management	Problem Management Task(LMIS)
Change Management	Change Management Task(LMIS)
Release Management	Release Management Task(LMIS)
Task(LMIS)	Task(LMIS)

Caution

- When using Google Chrome or Safari as your browser, the width of borders next to the Related Process Information screen appears somewhat reduced.
- The occurrence of errors when the Related Process Information screen appears likely indicates an error in the LMIS_ExploreSetting configuration file. Edit the configuration file, and then display the Related Process Information screen again.

Refer to the "コンフィグレーションガイド" for more information on configuration files.

(Making a change to a configuration file can affect the entire organization. Only system administrators should edit configuration files. Additionally, configuration files should be backed up before they are changed.)

◆ Checking the impact display results


- Brief description of the impact display

The impact display helps improve service levels by enabling the Relational Explorer to be used to check the influence of service faults, or to identify the need of preventive maintenance for configuration information.

- Impact display overview

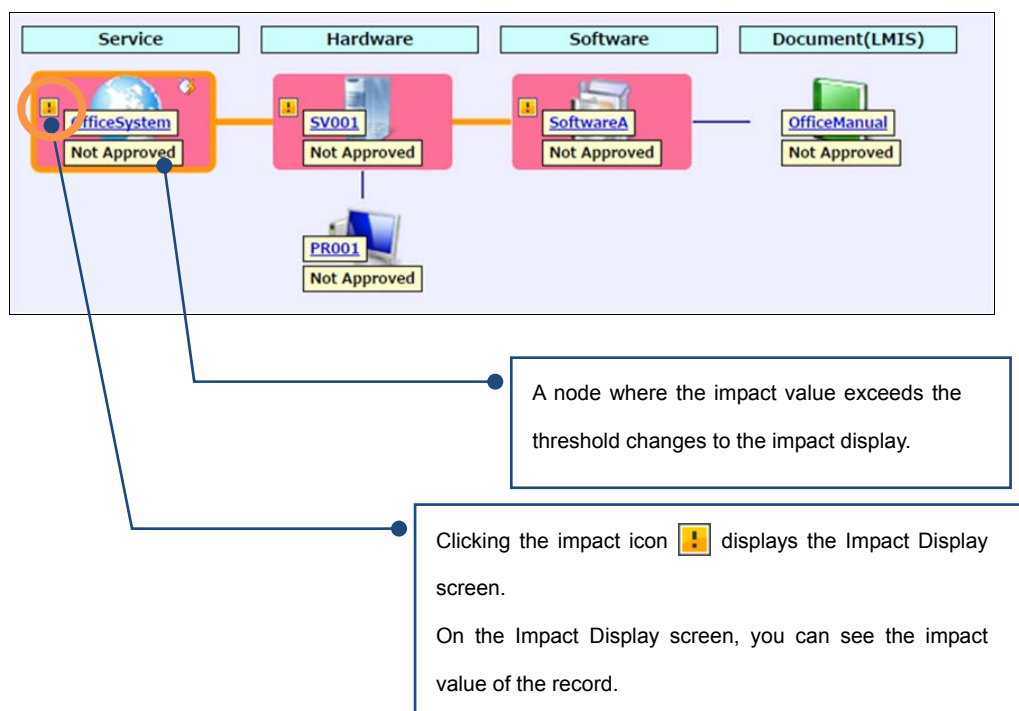
Impact values are automatically calculated from the [Number of Users] and [Service Unit Price] values of the service and the service contracts related to the service.

For the service, and the incident, hardware, software, and network records related to the service, the system calculates impact values, compares them with their preconfigured thresholds, and then visually shows whether the calculated values exceed the thresholds.

If the threshold is exceeded, the node changes to the impact display, which means that the impact icon  is added and the background color changes to red, as the influence (impact) from the service suspension is high.

*Thresholds can be configured as desired with configuration files.

Refer to the "LMIS on cloud コンフィグレーションガイド" for more information on configuration files.



- Impact display usage

[Checking the influence of an incident]

When an incident occurs, you might want to know the influence of service suspension due to the incident. In such a case, you can use the Relational Explorer to visually check the influence against the preconfigured impact value.

Persons in charge can determine and prioritize the best course of action by knowing the influence on the Relational Explorer.

[Identifying the need of preventive maintenance]

Configuration information for services that can cause severe impact in case of a failure must be protected with redundancy more preferentially than others.

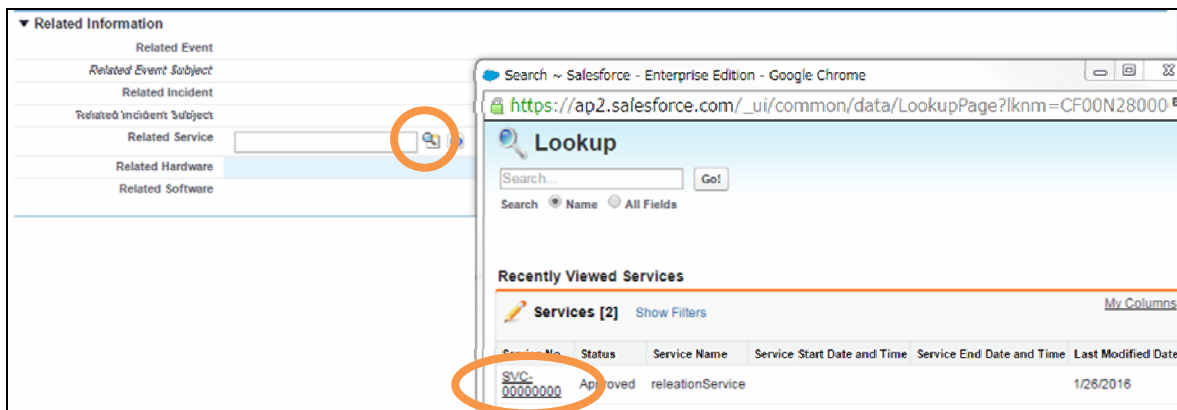
Using this function helps improve service (proactive support) levels by enabling you to proactively identify which sets of configuration information need preventive maintenance.

For example, the following describes how to use this function when you want to check the influence of an incident.

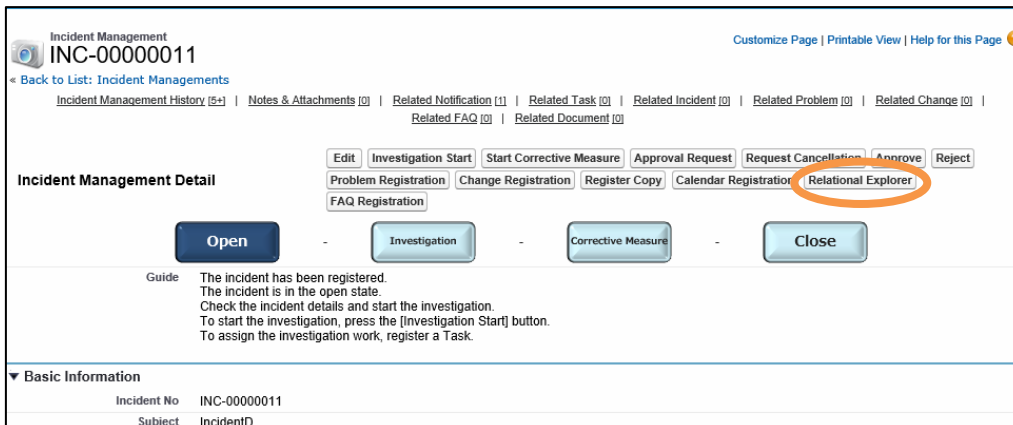
- (1) Register an incident that occurred.

Use [Related Service] to associate a related service with the incident.

*Refer to "2.8 Creating, Editing and Deleting Records" for more information on how to register new incidents.



(2) Open the detail screen of the incident you registered and click the [Relational Explorer] button.



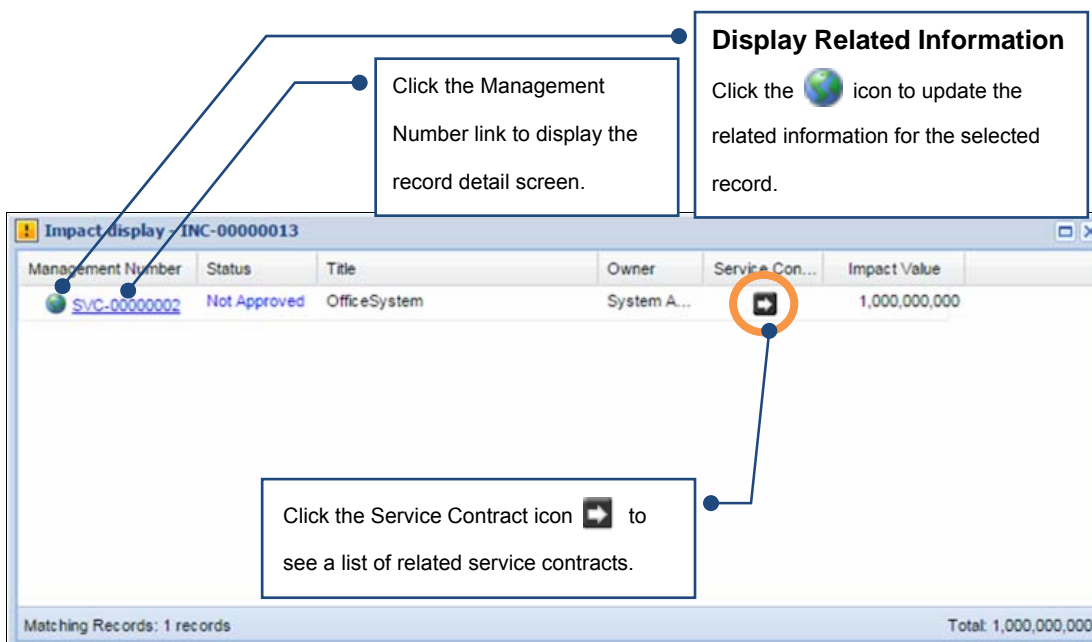
The Relational Explorer appears.

As the impact display is enabled, you can know that the incident has a high level of influence.



Click the Impact icon  to display the Impact Display screen.


You can see the information of the related service.



<How to use the screen>


- Click the [x] button to close the screen.
- Click the header field name to sort the records by ascending or descending order.
Drag and drop the header field names to change the order of each field column.

Caution

- When using Google Chrome or Safari as your browser, the width of borders next to the [Impact Value] on the Impact Display screen appears somewhat reduced.
- The occurrence of errors when the Impact icon  is clicked likely indicates an error in the LMIS_ExploreSetting configuration file. Edit the configuration file, and then display the impact analysis again.

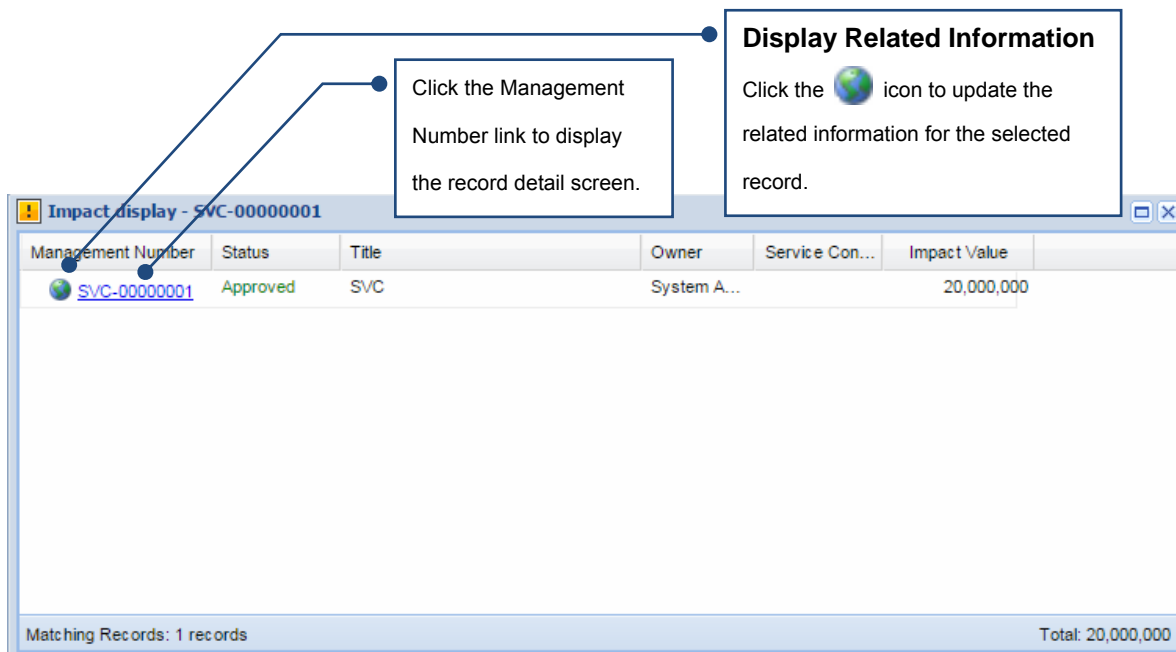
Refer to the " LMIS on cloud コンフィギュレーションガイド" for more information on configuration files.

(Making a change to a configuration file can affect the entire organization. Only system administrators should edit configuration files. Additionally, configuration files should be backed up before they are changed.)


Click the Service Contract icon  to display a screen showing a list of related service contracts.

The [Related Account] fields in the list represent accounts that can be affected.


This helps you know the scope of impact caused by the failure.



Display Related Information

Click the  icon to update the related information for the selected record.

Click the Management Number link to display the record detail screen.

Management Number	Status	Title	Owner	Service Con...	Impact Value
 SVC-00000001	Approved	SVC	System A...		20,000,000

Matching Records: 1 records Total: 20,000,000

<How to use the screen>

- Click the [x] button to close the screen.
- Click the header field name to sort the records by ascending or descending order.

Drag and drop the header field names to change the order of each field column.

- Impact value

A service record or service contract record has the [Number of Users], [Service Unit Price], and [Billing Amount] fields in the [Impact Information] section.

When you fill in [Number of Users] and [Service Unit Price], [Billing Amount] is automatically populated with the product of the two values.

This value is used as [Impact Value] in the impact display.

*Example of a definition screen for the following scenario

Number of Users (100) x Service Unit Price (1,000) = Billing Amount (100,000), which is the impact value

▼ Impact Information			
Number of Users	100	Service Unit Price	1,000
Billing Amount	100,000	Evaluation Expression	ox_exp_chargeAmount_c

If a service has related service contracts, the impact value of the service is the total of the impact values of the related service contracts. If a service has no related service contract, the impact value of the service is the billing amount set for the service.

The hardware, software, network, and incident records related to the service have the same impact value as that of the service.

<Example 1>

In this example, the threshold is 100,000 and the service has related service contracts. The total of the billing amounts of the service contracts is used as the impact value of the service. The service and its related records change to the impact display.

Object	Billing Amount	Impact Value
Service	50,000	80,000 (Related service contract A) + 40,000 (Related service contract B) = 120,000 *Impact display
Related service contract A	80,000	80,000
Related service contract B	40,000	40,000
Related Hardware	-	120,000 *Impact display
Related software	-	120,000 *Impact display
Related incident	-	120,000 *Impact display

<Example 2>

In this example, the threshold is 100,000 and the service has related service contracts. The total of the billing amounts of the service contracts is used as the impact value of the service. The service and its related records do not change to the impact display.

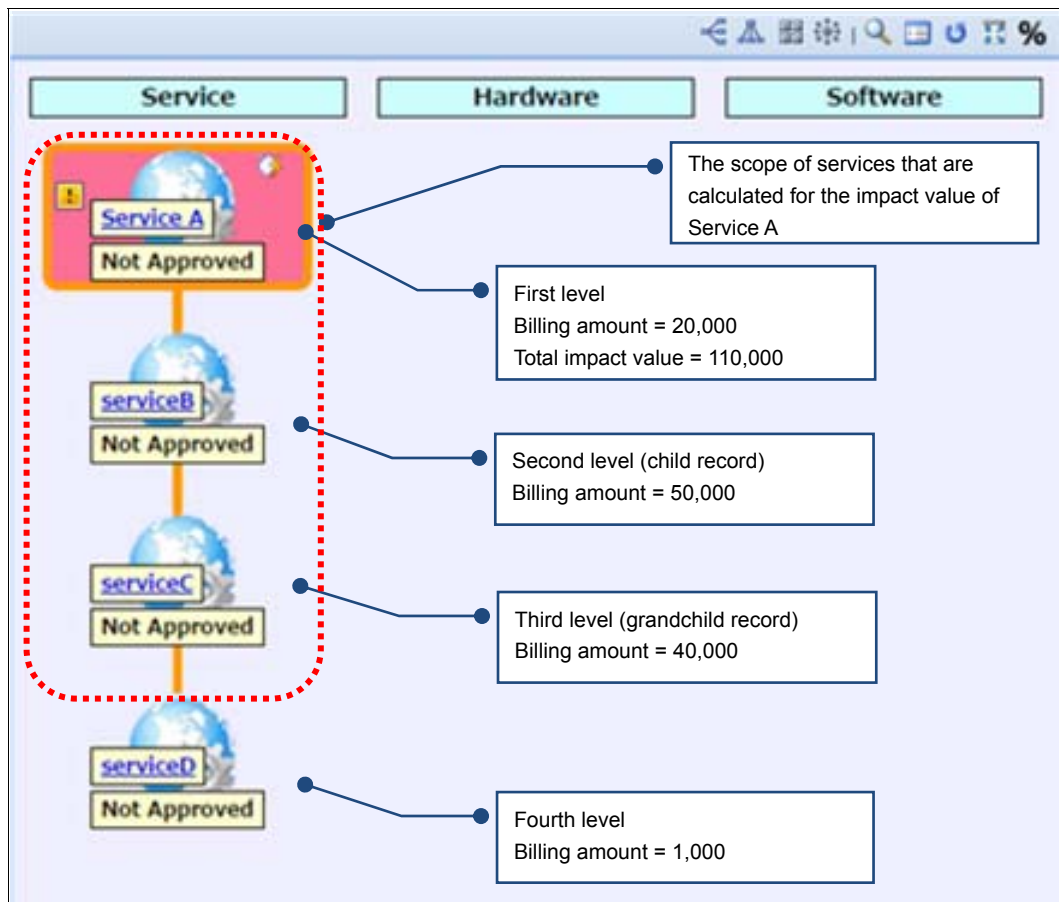
Object	Billing Amount	Impact Value
Service	120,000	50,000 (Related service contract A) + 30,000 (Related service contract B) = 80,000 *No impact display
Related service contract A	50,000	50,000
Related service contract B	30,000	30,000
Related Hardware	-	80,000 *No impact display
Related software	-	80,000 *No impact display
Related incident	-	80,000 *No impact display

Caution

To enable the impact display, the system calculates an impact value from services within three levels (that is, digging down to up to the grandchild record).

When a service has related services, the total of the billing amounts of the services within three levels is compared with the threshold. The service changes to the impact display when the total billing amount exceeds the threshold.

The following figure illustrates the impact display result when "Service A" (parent record) has related services in four levels.



The following figure illustrates the impact report of "Service A".

Management Number	Status	Title	Owner	Service Con...	Impact Value
SVC-00000002	Not Approved	Service A	System A...		20,000
SVC-00000003	Not Approved	serviceB	管理者_0...		50,000
SVC-00000004	Not Approved	serviceC	管理者_0...		40,000

Matching Records: 3 records Total: 110,000


Appendix.8.3 Changing the Screen Settings

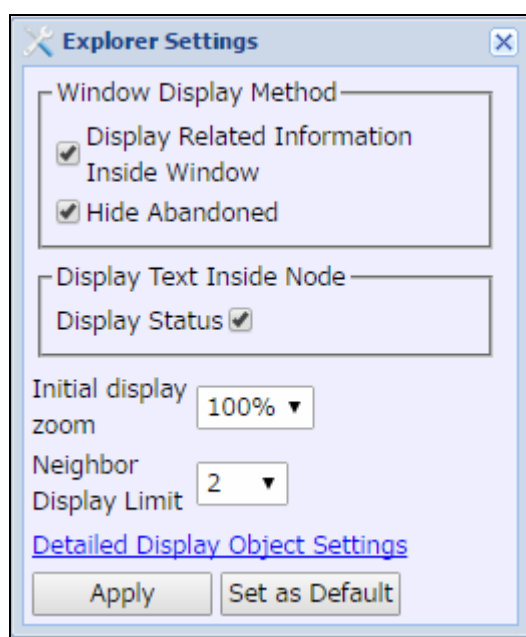
The settings for the "Relational Explorer" screen and the "Record Search" screen can be changed. This section explains the setting items and procedure.

Caution

Cookies must be turned on to save the settings.

◆ "Relational Explorer" screen settings

1. Click the explorer settings icon  in the Relational Explorer menu to open the settings screen.



The following setting items may be changed.

- Window Display Method
Select whether to open a new window or to open a child window inside the current window when the "Relational Explorer" screen is displayed. You can also select whether to display abandoned Configuration Information.
- Display Text Inside Node
You can set whether to display the status on the node.
- Initial display zoom
Specify the display zoom level when the chart is initially displayed.
- Neighbor Display Limit
The scope of the records displayed in the Related Information Explorer screen can be restricted by the degree of the neighbors. The value can be set from 1 to 5 or ALL, with 1 displaying only those records that are directly connected.

- Detailed Display Object Settings

The Relational Explorer Display Settings screen is used to configure which objects to display and advanced settings for each object.

For example, the following describes how to add the network object to the configuration management process. Each number in the following figure shows the corresponding step in the description.

*For this example, step 2 does not need to be performed.

2. Click either of the following after changing the setting details.

[Apply] button: Enable the setting only when in use. The setting will revert to the default value upon the next login.

[Set as Default] button: Use the same setting from the next login as well. Settings are saved for each user.

◆ **Configuring Settings on the Relational Explorer Display Settings Screen**

Relational Explorer Display Settings

>> Return to Relational Explorer

(7)(1) Personal Settings Save Settings Restore Previous Settings Restore Default Settings

(2) **Display Objects Settings**

Undisplayed Object	Display Object
User	Event Management
Contact	Incident Management
Account	Problem Management
Approver	Change Management
Information	Release Management
Notify	Service
Due Date	Hardware
Provider	Software
Task(LMIS)	Document(LMIS)

10 Displays objects

(3) **Detailed Settings for Each Object**

Object to be Set: Event Management

Display Objects Screen: Displays on the Process Information

Undisplayed Relation	Display Relation
	Related Object:N:N Relation
	Problem Management:Related Event
	Incident Management:Related Event
	Event Management:Related Event
	Document(LMIS):Related Event
	Change Management:Related Event
	Event Management:Related Hardware
	Event Management:Related Service
	Event Management:Related Software

(4) Node Title: Subject

Node Status: Status

Node Category: Event Category

(5) Object Icon: Settings Delete

(6) Conditional Icon: Add Accept email address Matches Settings

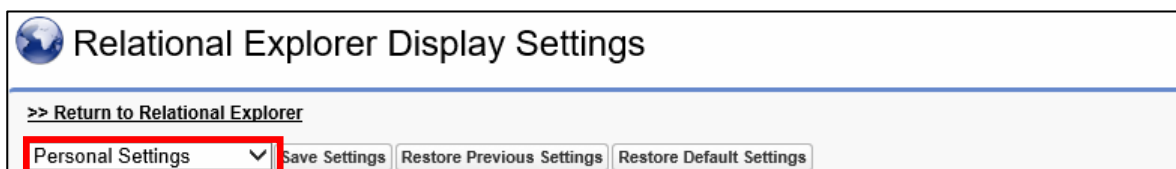
- (1) Select the type of the settings that you want to configure.

The available options are [Organizational Settings] and [Personal Settings].

*The [Type of Settings] pull-down list appears only for administrators. This procedure is intended only for administrators.

*[Personal Settings] have priority over [Organizational Settings].

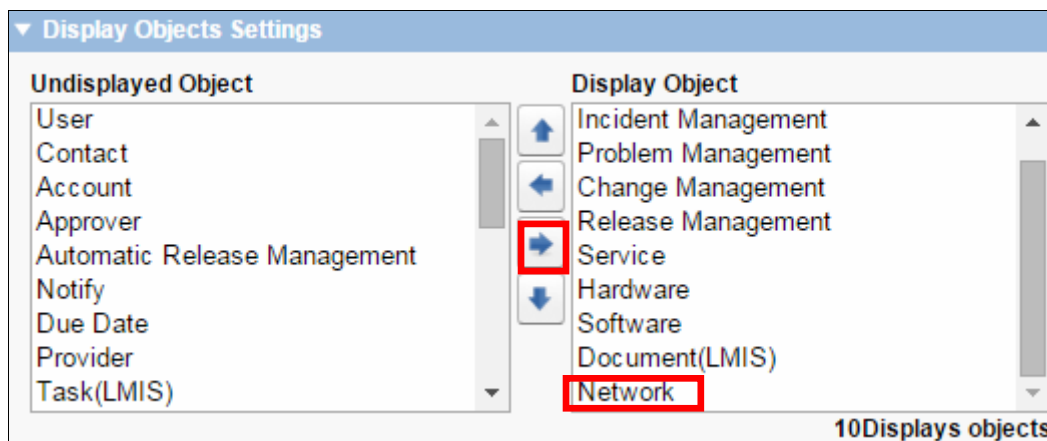
*Click [Return to the Relational Explorer] to return to the Relational Explorer screen.



- (2) Configure which objects to display and which ones to hide.

Select the objects you want to display in the [Undisplayed Object] list and click the right arrow button to add them to the [Display Object] list. In this example, the network object is added to the list.

*The objects in the [Display Object] list appear on the Relational Explorer in the order in which they appear in the list from top to bottom.

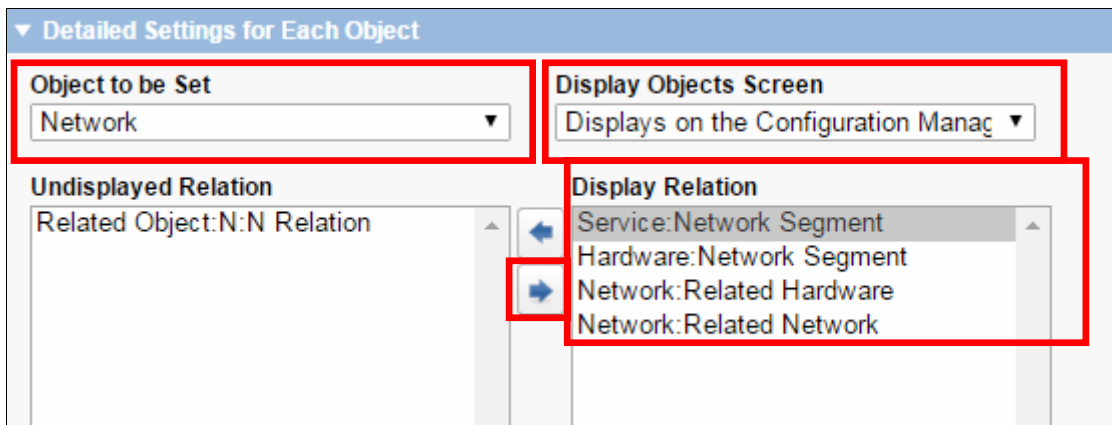


- (3) Configure which related objects to display for each object.

From the [Object to be Set] pull-down list, select the object for which you want to configure related objects to display. From the [Display Objects Screen] pull-down list, select either [Displays on the Process Information screen] or [Displays on the Configuration Management Information screen].

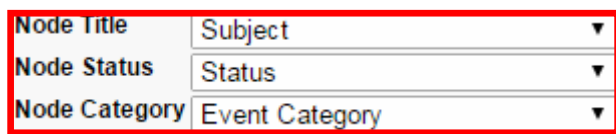
Next, configure which relations to display by using the [Undisplayed Relation] and [Display Relation] lists.

This example configures all relations related to the network object to be displayed on the Configuration Management Information screen.



- (4) For the object selected in step (3), use the pull-down lists to configure which fields to display on the node text labels, search results, and Detailed Help Tip screen.

*This step does not need to be performed if no changes are desired.



- (5) For the object selected in step (3), change icons used for the displayed objects.

*This step does not need to be performed if you do not want to change object icons.

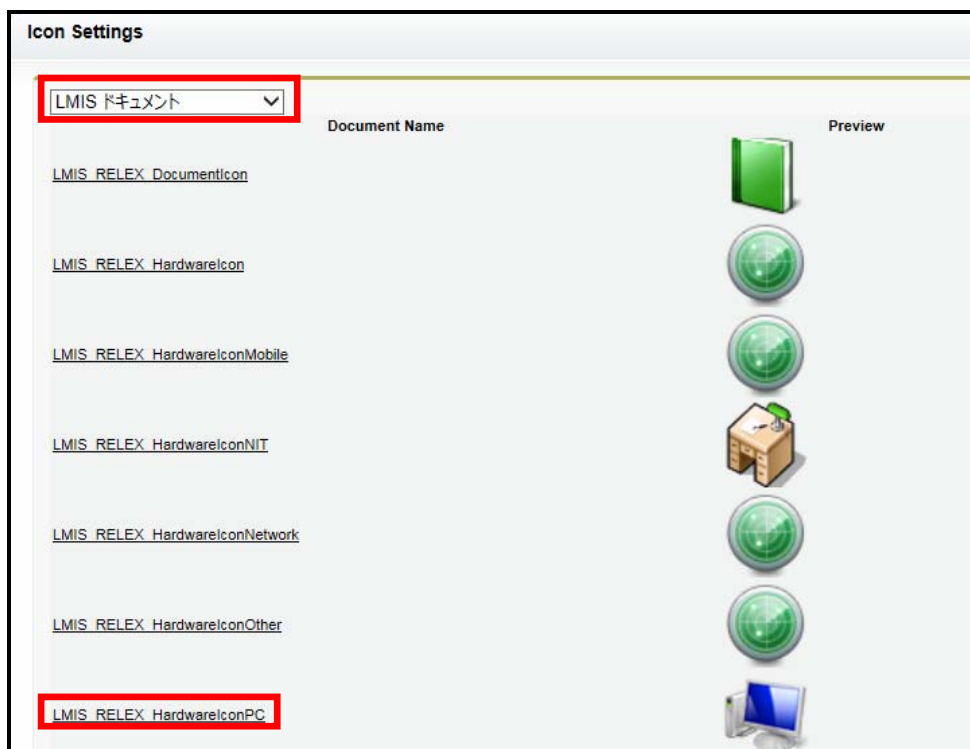
In Object Icon, click the [Settings] button.

*To delete configured icons, click the [Delete] button.



The Icon Settings screen appears.

From the pull-down list, select a document folder where icons are located. From the preview list of the icons, click the [Document Name] of the icon that you want.



- (6) For the object selected in step (3), configure conditions to determine which icon to display.

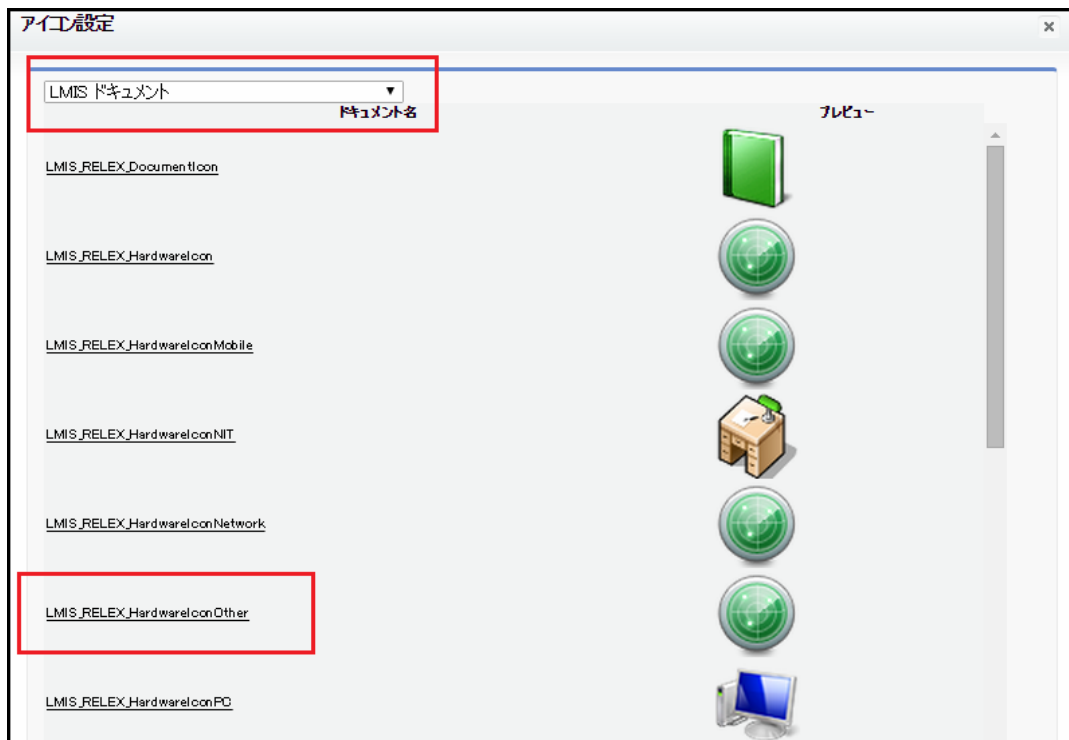
*This step does not need to be performed if you do not want to configure different object icons to be displayed depending on conditions.

In [Conditional Icon], enter a condition, and click the [Settings] button.

Conditional Icon			
<input type="button" value="Add"/>	Accept email address	Matches	<input type="button" value="Settings"/>

The Icon Settings screen appears.

From the pull-down list, select a document folder where icons are located. From the preview list of the icons, click the [Document Name] of the icon that you want.



*To add more conditions, click the [Add] button.

(7) Click the [Save Settings] button to save the settings.

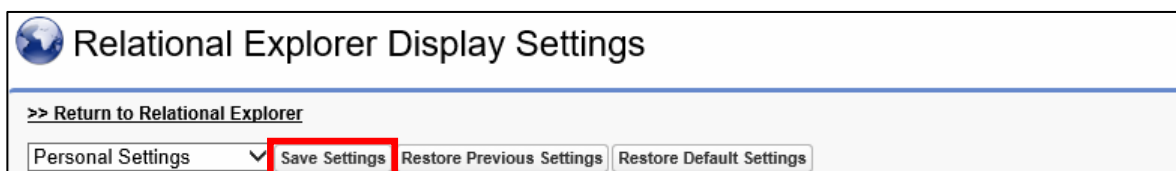
*Click the [Restore Previous Settings] button to restore the previously saved settings. If no settings have been previously saved, this restores the default settings.

*When you set [Type of Settings] to [Organizational Settings], clicking the [Restore Default Settings] button restores the LMIS default settings.

When you set saving destination to [Personal Settings], clicking the [Restore Default Settings] button restores the organizational default settings.

To apply restored settings, click the [Restore Default Settings] and then click the [Save Settings] button.

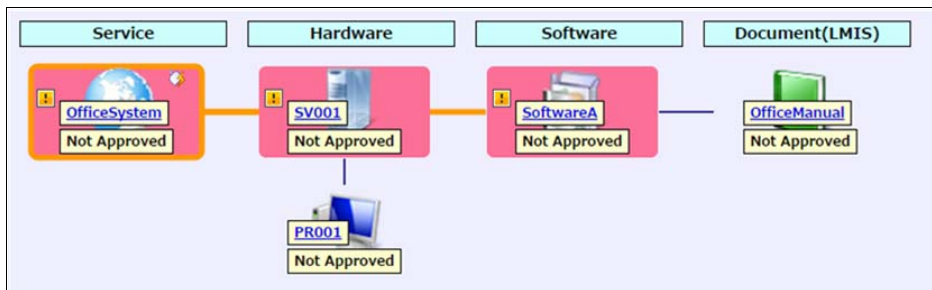
*The [Type of Settings] pull-down list appears only for administrators.



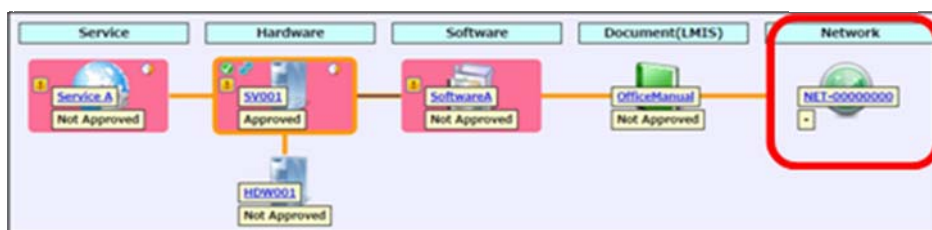
The network node is added.

The following figures illustrate how the displayed information changes before and after the changes.

Before changes



After changes



This completes the procedure to change Related Information Explorer display settings.

◆ "Record Search" screen settings

1. Click the Search Target Object Settings icon  in the Record Search menu to open the settings screen.

The following setting items may be changed.

- Search Target Object Settings

You can select the search target object to only search for a particular object (you cannot remove all objects from the search).

2. Click either of the following after changing the setting details.

[Apply] button: Enable the setting only when in use. The setting will revert to the default value upon the next login.

[Set as Default] button: Use the same setting for each user from the next login as well.

◆ Other


The following settings can be made using the icons in the Relational Explorer menu.

 Display magnification settings

Manually set the display magnification.

 Display full page

Enlarge or reduce the chart display to match the width and height of the window.

 Update with latest information

Retrieve the record information again to update the chart display contents.

Appendix.9 Calendar Registration

Response deadlines and other tasks can also be registered in the calendar.

This allows you to use it as a reminder for response deadlines or to easily manage schedules that take response deadlines and end dates into account.

To make a calendar registration, click the [Calendar Registration] button or use the settings file prepared in advance to register an item automatically in the calendar.

For details on how to perform automatic calendar registration, refer to the *"LMIS on cloud コンフイグレーションガイド"*.

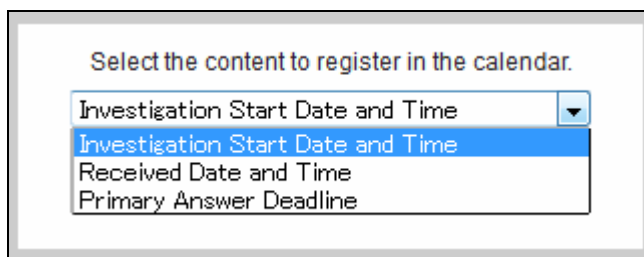
The following example registers an item in the calendar by clicking on the [Calendar Registration] button.

Appendix.9.1 Calendar Registration Button

- (1) Open the record's detail screen or the Create New screen to register a record in the Calendar.
- (2) Click the [Calendar Registration] button.

The following dialog (graphic below) is displayed.

Select the content to register in the Calendar and click the [OK] button.



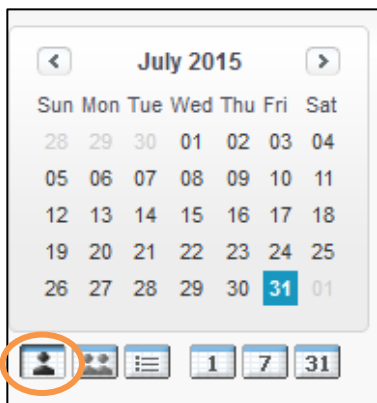
Appendix.9.2 User Calendar Display

Items that are registered using the Calendar Registration button are registered to your Calendar. The following explains how to display the User Calendar.

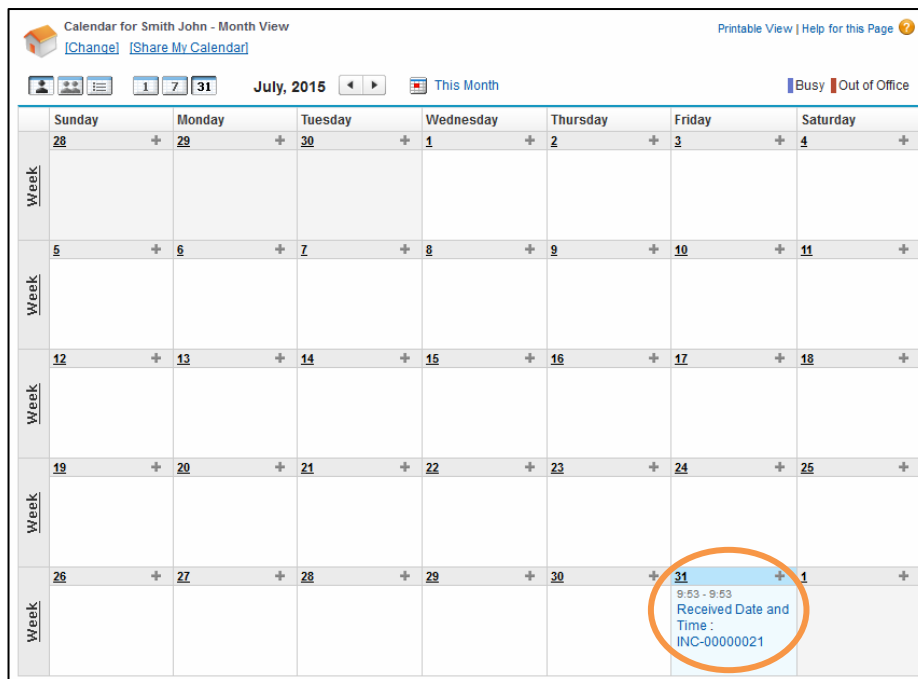
(For more details about how to use the automatic calendar registration function, refer to "Appendix.9.3 Public Calendar Display".)

- (1) Confirm the registered action.

Click the [Single User View] button on the [Home] tab.




- (2) Your Calendar is displayed.



- * An alert is displayed on the registered date.

For more details, refer to the *Salesforce User Guide*.

- * About Calendar sharing

To share a Calendar with another user, select the user to share with in the multi-user Calendar . (For more details, refer to the *Salesforce User Guide*.)

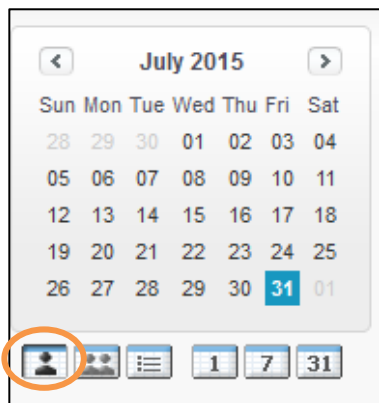
Appendix.9.3 Public Calendar Display

Information registered with the automatic calendar registration function can be confirmed in the Public Calendar.

The following explains how to display the Public Calendar.

(For more details about how to use the Calendar registration button, refer to "Appendix.9.2 User Calendar Display".)

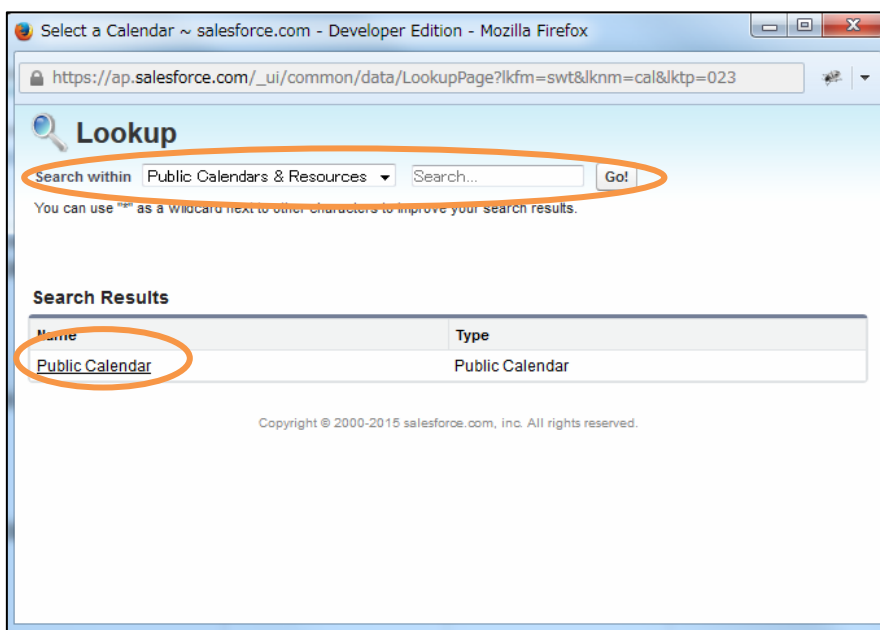
- (1) Click the [Single User View] button on the [Home] tab.



- (2) Click the [Change] button.



- (3) Select [Public Calendars & Resources] as the Search within, search for and click the public calendar to display.



(4) The Public Calendar is displayed.

Calendar for Public Calendar - Month View Printable View | Help for this Page ?

[\[Change\]](#) [\[Back to My Calendar\]](#)

1 7 31
July, 2015
◀ ▶
🇮🇳 This Month

| Busy
 | Out of Office

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Week	28 +	29 +	30 +	1 +	2 +	3 +	4 +
Week	5 +	6 +	7 +	8 +	9 +	10 +	11 +
Week	12 +	13 +	14 +	15 +	16 +	17 +	18 +
Week	19 +	20 +	21 +	22 +	23 +	24 +	25 +
Week	26 +	27 +	28 +	29 +	30 +	31 +	1 +

15:29 - 15:29
 Received Date and Time:Module for Sales Management System has been released. : RLS-00000005

Appendix.10 Send an Email Using the Activity History

History

From the activity history that appears in the following process records, you can create an email message composed from the process record update and send it to LMIS users, contacts, and fixed email addresses.

- Event Management
- Incident Management
- Problem Management
- Change Management
- Release Management
- FAQ Management
- Task(LMIS)

Depending on configured settings, this function can be used from two send screens with the following features:

- Standard send screen of activity history
 - You must specify one contact as a recipient.
 - Existing documents can be attached.
 - The send preview function can be used.
 - Supports HTML email and email templates.
 - Attached files are not stored in the activity history.
- Extended send screen of activity history
 - You can specify multiple contacts as recipients.
 - Attached files are stored in the activity history.

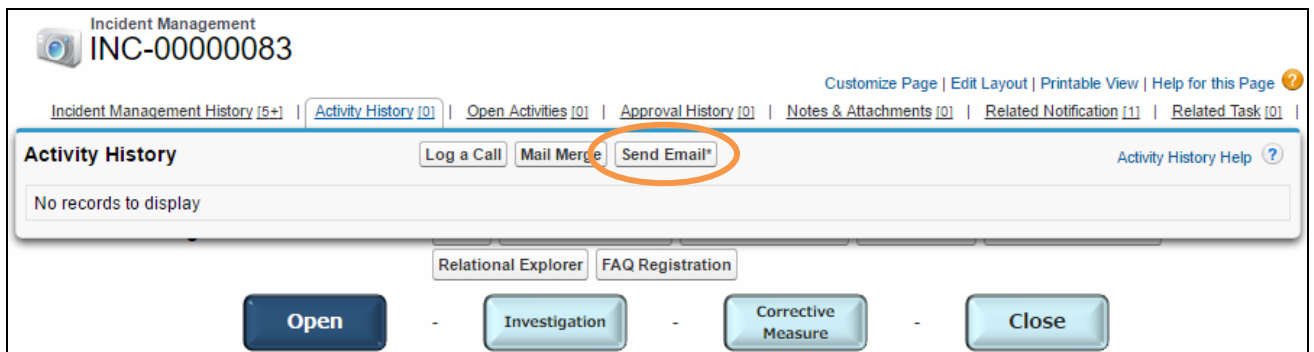
For both screens, you can use a configuration file to specify the default values for the recipient, CC, BCC, and subject fields as well as the message content. By doing so, the fields and message are automatically populated with the default values.

Refer to the " LMIS on cloud 連携ツールガイド" for more information on using screens and configuring default values.

Appendix.10.1 How to Use (Standard Send Screen)

This section describes how to send email from the standard send screen of activity history.

- (1) Open the detail screen of a record to send an Email and click the [Send Email*] button in the Activity History.



- (2) Enter the required information in the displayed send Email screen and click the Send button.

The screenshot shows the 'Edit Email' screen. At the top, there are buttons for 'Send', 'Select Template', 'Attach File', 'Check Spelling', and 'Cancel'. The 'Send' button is circled in orange. The email form includes fields for 'From' (Smith John <lmis.english@sample.com>), 'To' (to.address@sample.com), 'Related To' (Incident Management - INC-00000021), 'Additional To' (lmis.english@sample.com), 'CC:', 'BCC:', and 'Subject' (LMS Email Notification[INC-00000021 Password issued]). The 'Body' field contains the text: 'Dear XX, I notify that your new password has been issued. Password: XXXXXXXX. Best regards, John Smith'. At the bottom, there are buttons for 'Send', 'Select Template', 'Attach File', 'Check Spelling', and 'Cancel'. Below the email form is an 'Attachments' section with an 'Attach File' button and the text 'no attachments'.

The following table lists fields that you specify:

Entry field	Description
Email format	Select the email format (text or HTML).
Sender	Select the sender. This can be selected when the organization addresses have been registered.
Recipient	Select a contact.
Relation	Set a record with which the activity history is registered. The default values can be used without changes.
Additional recipients	Specify TO recipients by typing the addresses or by selecting from the LMIS users.
CC	Specify CC recipients by typing the addresses or by selecting from the LMIS users.
BCC	Specify BCC recipients by typing the addresses or by selecting from the LMIS users.
Subject	Enter the subject of the email. This can be set by using a template.
Body	Enter the body of the email. This can be set by using a template.
Attachment files	Select attachment files. Sent attachment files are not stored in LMIS.

(3) The content of the sent Email is added to the record's Activity History.

Incident Management
INC-00000021

Customize Page | Printable View | Help for this Page ?

< Back to List: Incident Managements

Notes & Attachments [0] | **Activity History [1]** | Related Notification [1] | Related Task [0] | Related Incident [0] | Related Problem [0] | Related Change [0] |

Activity History Log a Call Mail Merge Send an Email View All Activity History Help ?

Action	Subject	Name	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Email: LMIS Email Notification[INC-00000021:Password issued]		✓	2015/07/31	Smith John	2015/07/31 9:45

Open - Investigation - Corrective Measure - Close

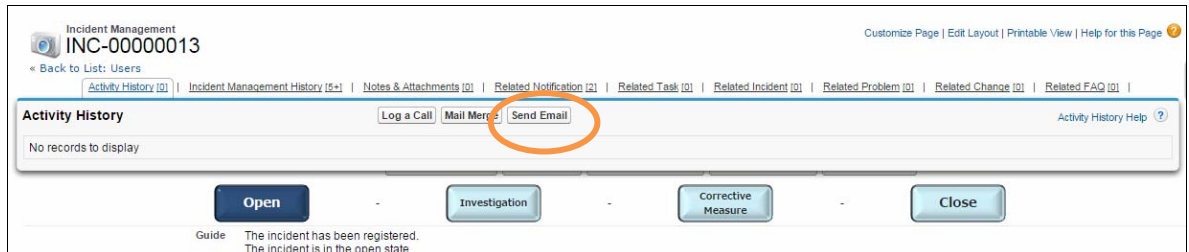
Guide
The incident has been registered.
The incident is in the open state.
Check the incident details and start the investigation.
To start the investigation, press the [Investigation Start] button.
To assign the investigation work, register a Task.

▼ Basic Information

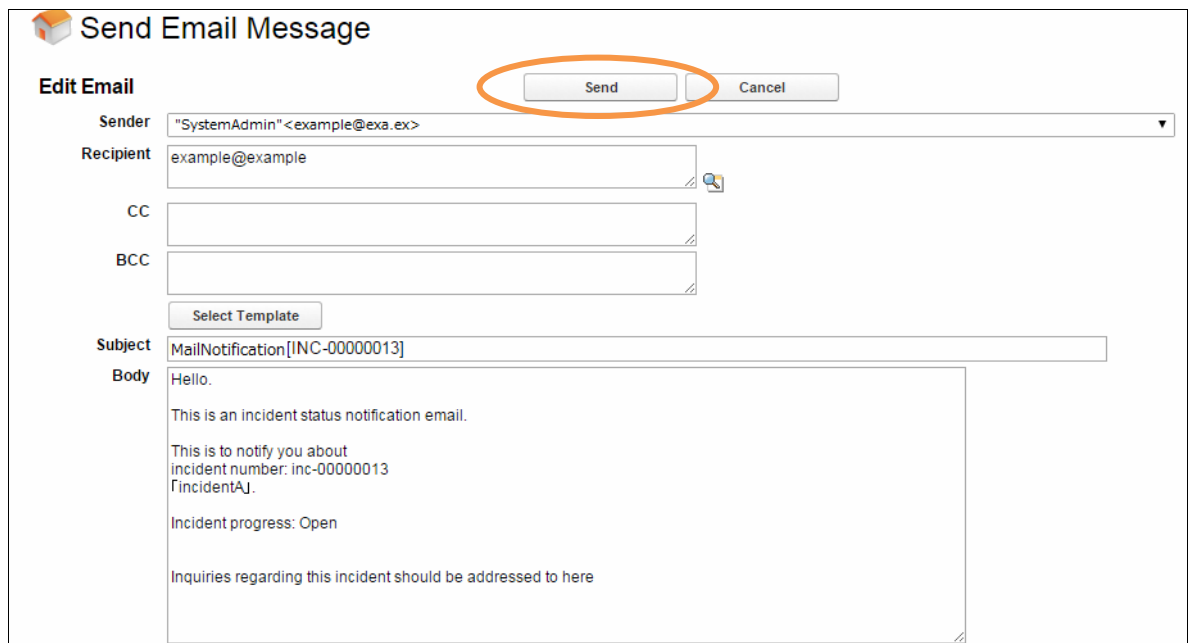
Appendix.10.2 How to Use (Extended Send Screen)

This section describes how to send emails from the extended send screen of activity history.

- (1) Open the detail screen of a record to send an Email and click the [Send Email] button in the Activity History.



- (2) Enter the required information in the displayed send Email screen and click the Send button.




The following table lists fields that you specify:

Entry field	Description
Sender	Select the sender. This can be selected when the organization addresses have been registered.
Recipient	Specify TO recipients by typing the addresses or by selecting from the LMIS users and contacts.
CC	Specify CC recipients by typing the addresses or by selecting from the LMIS users and contacts. *

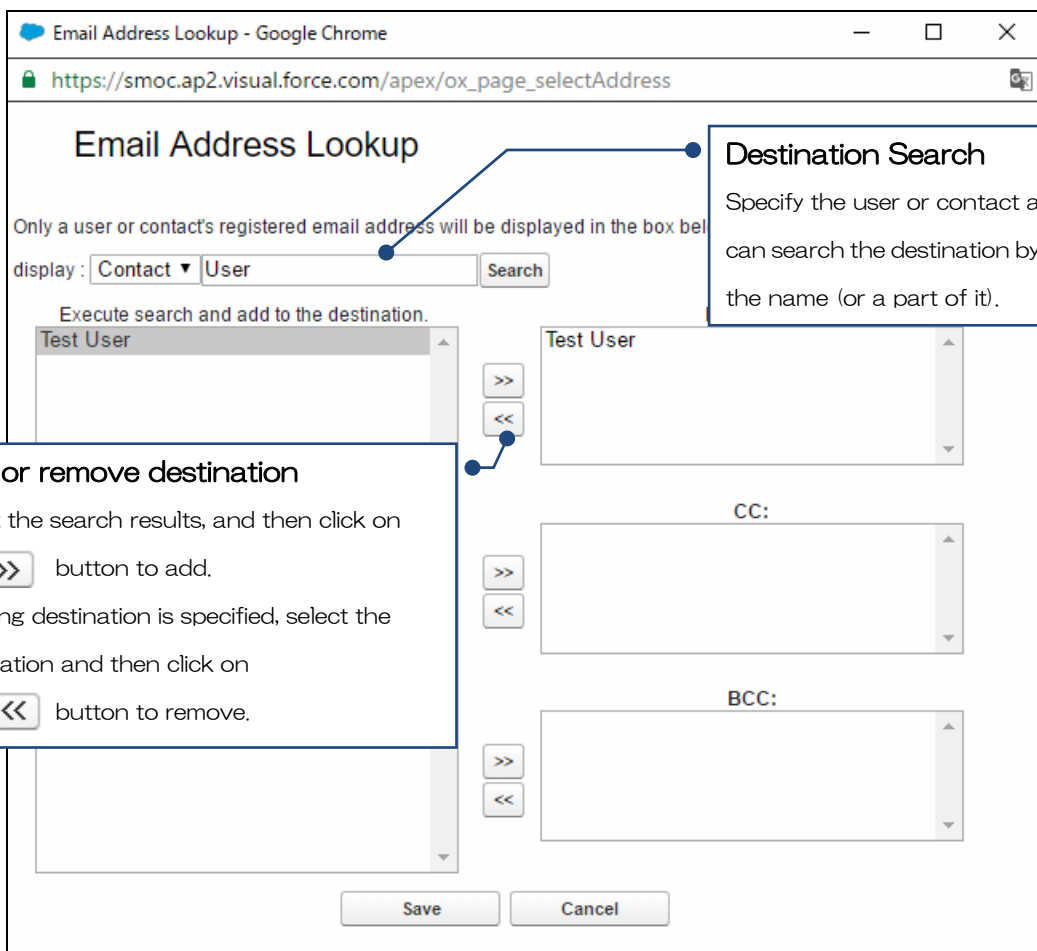
Entry field	Description
BCC	Specify BCC recipients by typing the addresses or by selecting from the LMIS users and contacts. *
Subject	Enter the subject of the email. This can be set automatically by using a template.
Body	Enter the body of the email. This can be set automatically by using a template.
Attachment files	Select attachment files.

*To select Recipient, CC and BCC, a delegated email address lookup can be used.

- Click on the  icon on the right side of [Recipient].

Recipient 

- The email address lookup screen is displayed.
Make a selection as explained below and click [Save] button.



Destination Search
Specify the user or contact and you can search the destination by entering the name (or a part of it).

Add or remove destination
Select the search results, and then click on the **>>** button to add.
If wrong destination is specified, select the destination and then click on the **<<** button to remove.

(3) The content of the sent Email is added to the record's Activity History.

Incident Management Customize Page | Edit Layout | Printable View | Help for this Page

INC-00000013

[Back to List: Users](#) | [Activity History \(1\)](#) | [Incident Management History \(2+\)](#) | [Notes & Attachments \(0\)](#) | [Related Notification \(2\)](#) | [Related Task \(0\)](#) | [Related Incident \(0\)](#) | [Related Problem \(0\)](#) | [Related Change \(0\)](#) | [Related FAQ \(0\)](#)

Activity History Activity History Help ?

[Log a Call](#) | [Mail Merge](#) | [View All](#) | [Send Email](#)

Action	Subject	Name	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	01/28/2016 10:30:48		✓	1/28/2016	SystemAdmin	1/28/2016 10:30 AM

Open
Investigation
Corrective Measure
Close

Guide The incident has been registered.
The incident is in the open state.

Appendix.11 Managing Attachment Files

Attachment files can be used in information and incidents in the Self Service Portal. This section explains how to set the file attachments to Published and Not Published.

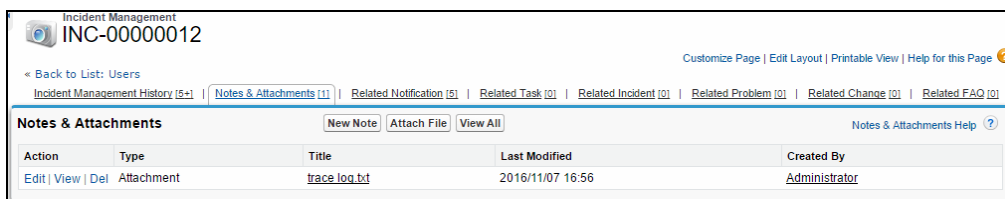
The following objects can use the Published, Not Published function for file attachments.

- FAQ Management
- Incident Management
- Activities (To Do)
- Information

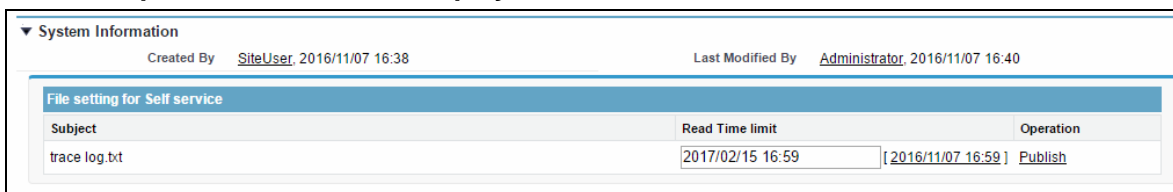
Appendix.11.1 Publishing and Unpublishing Attachment Files

This section describes the procedure used by incident creators to attach files to incidents and share them with other Self Service Portal users.

1. Attach files to an incident.

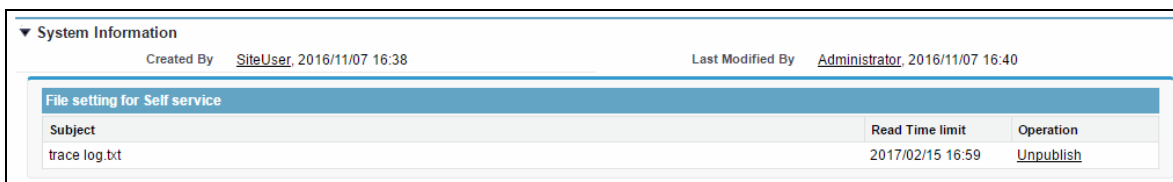


2. A list of attachment files appears in the [File setting for Self service] section when the lower part of the screen is displayed.



3. Specify the Read Time limit and click [Publish].

The file is published and can be viewed on the Self Service Portal for the duration of the file access period.



Click [Unpublish] if the file is accidentally published.

LMIS on cloud V2.3.1

Operations Guide

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