

# **Oracle Operations Management Platform**

User's Guide,

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# Preface

This guide provides information about how to use Operations Management Portal (OM Portal) to perform tasks, such as managing accounts and creating Change Management (CM) tickets, for Operations Management Platform (OM Platform).

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**Note:** Use Microsoft Internet Explorer 8 or later, or Mozilla Firefox 3.5 or later, to access OM Portal.

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## Audience

This document is intended for OM Portal users.

## Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible to all users, including users that are disabled. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Accessibility standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For more information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>.

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## Related Documents

For more information about using OM Platform and OM Portal, see the *Frequently Asked Questions (FAQ)* and [Appendix A, "Customer Training Videos"](#).

## Conventions

The following text conventions are used in this document:

Convention	Meaning
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
<code>monospace</code>	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.



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# Introduction to Oracle Operations Management Portal

This document describes how to use Operations Management Portal (OM Portal) and provides an overview of Operations Management Platform (OM Platform) and OM Portal.

It includes the following topics:

- [About OM Platform](#)
- [About OM Portal](#)
- [Accessing OM Portal](#)

## About OM Platform

OM Platform is a fully integrated, ITIL-based operations management framework, including tools, processes, and technology, which is hosted by Oracle and delivered through the Web as a Software-as-a-Service (SaaS).

OM Platform capabilities include:

- Operations Management Portal (OM Portal) that provides easy navigation and reporting functionality
- A customer-generated on-demand reporting engine
- Heterogeneous event monitoring and rules engine for faster problem detection and resolution
- Enhanced security features
- A Configuration Management System (CMS) to support physical and logical devices

OM Platform benefits include:

- Efficiencies in service delivery through automated features such as customer setup and management.
- Secure service delivery with full data segregation and access control.
- Improved quality of service through proven ITIL-based processes embedded into the tool workflow.
- Greater flexibility with a customizable and scalable Web-based platform for access anywhere at any time.

## About OM Portal

The Oracle Operations Management Portal forms the interface between Oracle and its customers, enabling users to access information through Web browsers and combine information from different sources into a single entry point. OM Portal is secure, easy-to-use, and provides access to ITIL-based service application tools and best-practice workflows, enabling users to monitor and manage their infrastructure elements and drive competitive advantage to their core businesses.

## Accessing OM Portal

OM Portal provides you with a single, intuitive interface for managing your IT infrastructure. Your level of access to the features available in OM Portal depends on the user profile assigned to you by your system administrator. The user profile, which includes your user name and password, configures the Oracle Operations Management workspace and determines which service applications are available to you. For information about user profiles, see "[Managing User Roles](#)".

Log in to the Oracle Operations Management Portal using your Sun Online Account user name and password. After logging in, you see the OM Portal Dashboard page that presents a list of applications for which you are authorized to access.

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**Note:** If you do not have a Sun Online Account, go to the following Web site:

<https://reg.sun.com/>

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# Using Account Management

This chapter covers the following topics:

- [About Account Management](#)
- [Accepting Invitations](#)
- [Inviting Users to Your Organization](#)
- [Managing the Address Book](#)
- [Managing User Access](#)
- [Managing User Preferences](#)

## About Account Management

Account Management is based on principles of segregation and full data privacy between organizations and users, preventing any access or views across groups.

Account Management manages the following components:

- Organizations
- Users
- Contacts
- Roles and Permissions

Users are authenticated when logging into Operations Management Portal (OM Portal) using their Sun Online Account. If you are authorized to use Account Management, then the Accounts menu is visible.

Account Management provides the ability to manage an organization, or in the case of service delivery teams, to manage customer organizations. Each organization has users who can be granted roles and access to protected resources (such as systems, configuration items, and knowledge articles) based on the applications provisioned to their organization. Only certain users (based on role) are allowed to manage their organization(s). Other users, via their assigned role, will have read-only access to their data. For more information about roles and permissions, see "[Managing User Roles](#)".

## Managing User Roles

Account Management manages the real-time creation of an account for every OM Portal user and enables you to define role membership according to business policies, map roles to users, and change the state of roles (active state or inactive state) to control access.

Users must have OM Portal accounts and belong to an organization before they can be granted roles in OM Portal. A user must belong to either a customer organization, which owns the configuration items to which the user is being granted access or the Oracle service delivery organization, which provides services to the CIs owned by a customer organization.

### User Roles for a Customer Organization

Oracle assigns the standard user role to users that belong to a customer organization. This role allows users to review the status of Incident and Change tickets and issue resolution data, observe the performance of customer systems and applications, and view real-time and trending reports.

The following table provides an example of a customer user role defined in OM Portal.

Service Delivery Roles	Role Description
Standard	Customer users that have view privileges to their configured organization within the OM Portal.

## Accepting Invitations

This topic describes how Oracle Operations Management Portal users can accept invitation to become an active member of organization, or decline the invitation. Users become members of an organization by invitation from another user having appropriate privileges for your organization. When you are invited to join an organization, you will receive an e-mail notification:

Welcome,

You have been invited by *User\_Name* to become a user of the Oracle Operations Management Platform as a member of the *Customer* organization. You can accept or reject this invitation using the URL below.

[http://itsp-uat-portal.central.sun.com:8080/accept\\_invite.xhtml?id=a94159f3-7775-46bc-93e6-6fbe05f48a24](http://itsp-uat-portal.central.sun.com:8080/accept_invite.xhtml?id=a94159f3-7775-46bc-93e6-6fbe05f48a24)

Note: A Sun Online Account is required to view the invitation. If you do not already have one, you can follow the link below to create one:  
<https://reg.sun.com/register>

Thanks,  
The Oracle Operations Management Team

After you accept the Invitation, you become a member of the organization. Log in to Operations Management Portal (OM Portal) with your credentials and edit your user preferences.

## Inviting Users to Your Organization

This topic describes how to invite an OM Portal user to join a customer organization.

To access the IT resources that are owned by an organization, the user must be a member of that organization. Users become members of an organization by invitation from another user with the appropriate User Administrator privileges.

Once a user is a member of an organization, they can be granted roles to perform appropriate operations and access specific resources.

To invite a user to an organization:

1. Log in to OM Portal using your Sun Online Account.

The Dashboard page appears.

2. From the Accounts menu, select **Address Book**.

The list of users associated with the your organization appears

3. Click **Invite New Users**.

The Invite Users to *Organization* page appears where *Organization* is your organization name.

4. In the Email Addresses box, enter one or more e-mail addresses.

5. Assign role(s) to the user as follows:

- a. Select the required roles.
- b. Click **Add Selected**.

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**Note:** To assign all roles to the user, click **Add All**.

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6. Click **SEND INVITATION** to send the invitation by e-mail to all the users you specified in step 5.

The *Your invitations have been sent* message appears.

OM Portal sends an e-mail to the listed users inviting them to become a member of the organization. The users can accept or decline the Invitation.

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**Note:** After a user accepts the invitation, OM Portal displays the corresponding record in the Address Book. Then you can enter the additional user information (including the user Title, Address, and Phone Number) in the Edit mode. For more information, see ["Managing the Address Book"](#).

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## Managing the Address Book

This section describes how to use the Address Book to invite new users to an organization or to create new contacts for an organization in OM Portal.

There are two kinds of entries in the Address Book:

- Users

Registered users who can log in to OM Portal using a Sun Online Account and can perform certain actions based on the assigned role.

- Contacts

Records in Address Book that cannot be used to log in to OM Portal.

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**Note:** Service delivery users (with appropriate privileges) can view and administer the Address Books for their own organization and for all the customer organizations they are authorized to manage.

Customer users (with appropriate privileges) can view and manage their own Address Books only.

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To manage address books:

1. Log in to OM Portal using your Sun Online Account.

The Dashboard page appears.

2. From the Accounts menu, select **Address Book**.

The Address Book page appears.

From this page, you can perform the following tasks:

- [View Users and Contacts in an Organization](#)
- [Add Contact](#)
- [Inviting Users to Your Organization](#)

## View Users and Contacts in an Organization

Use this procedure to view users and contacts associated with your customer organization, as well as information about the user or contact.

To view users and contacts:

1. Log in to OM Portal using your Sun Online Account.

The Dashboard page appears.

2. From the Accounts menu, select **Address Book**.

The list of users and contracts associated with the current organization appears.

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**Note:** To display inactive contacts or users, select **Show inactive users**.

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3. Locate the user or contact you want to view and then click **View**.

The Details page for the user or contact appears.

4. From this page, you can modify the user or contact information by clicking **Edit**.

## Add Contact

The Address Book enables you to manage, build and consolidate all your contact information into one place. You can create different types of contacts.

A Contact is an entry in the Address Book which does not have to be associated with a Sun Online Account. For example, an e-mail alias can be entered as a contact for an organization.

Users with appropriate permissions (based on Role) can add and control contacts in the Address Book.

To add a new contact for an organization:

1. Log in to OM Portal using your Sun Online Account.

The Dashboard page appears.

2. From the Accounts menu, select **Address Book**.

The list of Users and Contracts associated with the your organization appears

3. Click **Add Contact**.

The Create Contact page appears.

4. Select the **Active** option if necessary.
5. In the Details area:
  - a. In the First Name box, enter the first name of the contact.
  - b. In the Last Name box, enter the last name of the contact.
  - c. In the Title box, enter a title for the contact.
6. In the Phone Numbers area, enter the contact phone numbers and select the type of phone number.
7. In the Email Addresses area, enter the contact e-mail addresses.
8. Select **Notification** for the e-mail addresses that will receive OM Portal notifications.

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**Note:** You must select at least one e-mail address for notifications.

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9. In the Preferences area:
  - a. From the Language list, select the language associated with the contact.
  - b. From the Time Zone Region list, select the region associated with the contact.
  - c. From the Time Zone City list, select a city from the selected region to set the time zone for the contact.
  - d. From the Date Format list, select the date format.
  - e. From the Time Format list, select the time format.
10. Click **SAVE**.

The new contact appears in the list on the Address Book page.

## Managing User Access

This section describes how to assign roles to OM Portal users.

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**Note:** Users must log out and log in again to view a new set of assigned roles and permissions.

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When roles are created for the organization and users have accepted their invitation, then you must grant appropriate roles to the new users. Assigning roles to users governs what they can do in OM Platform.

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**Note:** Only privileged users with appropriate permissions (based on role) can perform the role assignment for organizations.

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To assign a role to a user:

1. Log in to OM Portal using your Sun Online Account.

The Dashboard page appears.

2. From the Accounts menu, select **Address Book**.

The Address Book page for the current OM Portal user appears.

3. Locate the user to whom you want to assign a role and click **Assigned Roles**.

The Assigned Roles for *User\_Name* page appears.

4. From the left hand list, select the required roles to assign to the user and click **Add Selected**.

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**Note:** To add all the available roles, click **Add All**.

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5. Click **SAVE**.

OM Portal returns you to the Address Book page.

## Remove a Role from a User

To remove a role from a user:

1. From the Assigned Roles for *User\_Name* page, select the roles you want to remove in the right side list.
2. Click **Remove Selected**.

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**Note:** To remove all roles, click **Remove All**.

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3. Click **SAVE**.

OM Portal returns you to the Address Book page.

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**Note:** Before you to delete a role, you must remove the role from all users.

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## Managing User Preferences

This section describes how OM Portal users can set up their working environment, including language, time zone, date and time formats.

All users in OM Portal have permission to view or update their user preferences.

To view and manage your user preferences:

1. Log in to OM Portal.

The Dashboard page appears.

2. From the Accounts menu, select **My Preferences**.

The My Preferences page appears.

3. In the Details area, update your name and title.
4. In the Phone Numbers area, enter your contact phone numbers and select the contact phone type.
5. In the Email Addresses area, enter your contact e-mail addresses. Select **Notification** for the addresses that will receive OM Portal notifications.

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**Note:** At least one e-mail address must be selected for notifications.

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6. In the Preferences area, update your language, time zone region and city, and date and time format information.
7. Click **SAVE**.



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# Using Configuration Management System

This chapter covers the following topics:

- [About Configuration Management System](#)
- [Using the CMS Browser](#)
- [About the Configuration Item Dashboard](#)
- [Viewing or Modifying CI Attributes](#)
- [Viewing CI Facilities](#)
- [Viewing Vendor Support Contracts](#)

## About Configuration Management System

The Configuration Management System (CMS) constitutes a set of tools and databases that are used to manage the configuration data of an organization's IT infrastructure and services. The CMS contains data about users, suppliers, locations, business units, and customers.

The CMS Browser provides a set of tools for quick searching, viewing, and managing customizable sets of Configuration Items (CIs).

## Key Features and Benefits

The key features and benefits of CMS include the following:

- **Identifies Customer Assets**  
Enables you to track and manage physical and logical assets. These assets are identified within the CMS as Configuration Items (CIs). CIs can be further combined into CI Groups to aggregated identification.
- **Manages Customer Assets**  
Enables you to search for CIs based on multi-criteria conditions, save search conditions, retrieve Level of Service (LOS) information for CIs associated with a detected event, and view customer level statistics associated with a CIs.
- **Enables export to CSV or MS Excel format**  
You can export lists of configuration items (along with their properties) to CSV and MS Excel format to be fed into other systems or for later analysis. This provides flexibility in viewing configuration items and enables their use in external systems such as billing systems.
- **Enables inventory views and management level summarized views**

The CMS Browser page provides multiple customizable filtering options, as well as shows configuration item groups and a list of filtered results.

- Provides the required level of information

The CMS System Dashboard shows the hierarchy of configuration items, and users are able to drill down to the required level of information.

## CMS Dependencies

You can access CMS through Operations Management Portal (OM Portal) and use it to manage CIs and their relationships. CMS feeds this CI and CI Group information to support the operations of Incident Management, Change Management, and the Event Dispatcher.

### CMS and Incident Management

CMS assists Incident Management by:

- Providing valuable information about how much of the IT infrastructure is affected.
- Providing up-to-date information about customers, owners and status of CIs.
- Assisting with identification of incidents of similar CI type.

### CMS and Change Management

CMS assists Change Management by:

- Enabling you to choose CIs and assets as targets of a change.
- Providing CMS relationship information to assess the potential impact on end-users and the IT infrastructure when a particular CI is taken offline.
- Providing up-to-date information about customers, owners and status of CIs.

## CI Relationships

A relationship defines the link between two CIs. Relationships represent the dependencies and connections between the entities in a customer's IT environment. The same attributes defined for CI types are defined for relationships also.

CMS defines a set of rules that governs the creation of relationships between CIs to ensure that only valid relationships are created.

### Implied/Contextual Relationships

Contextual relationships are those that are created based on the context of the user when creating a new CI. For example, a computer system to operating system relationship is always contextual. The user never explicitly creates a relationship between the two items. Instead, the relationship is inferred based on the computer system that was visible when the user clicks the "add operating system" link. The table below outlines the contextual relationships that are supported by the CMS.

We can consider that the graph of implied relationships for a set of related CIs is a tree.

Source Class	Target Class	Description
Physical System	Large systems	Large systems such as Exadata, are installed on a physical system. Physical elements can be nested to form trees.

Source Class	Target Class	Description
Computer System	Operating System	An operating system is installed on a computer system. The computer system item may represent a physical or a virtual machine.
Operating System	Application	An application is installed on an operating system. Most applications are only valid within the context of an operating system.
Computer System	Application	An application that is installed on a computer system. This covers a subset of applications, which are not considered operating systems, which can be installed directly onto a computer system. Examples include hypervisor software like xVM Server and VMWare. Service processor firmware can also be modeled this way.

### Explicit Relationships

Explicit relationships are relationships between configuration items that must be explicitly created by the end users. The user will choose the source configuration item, the relationship type, and the target configuration item.

The graph representing explicit relationships between object cannot be restricted to a simple tree. Editing and visualizing these relationships might require more sophisticated graphical models, than simple tree structure as for implicit relationships.

Source Class	Target Class	Description
Computer System	Computer System	Clustered
Location	Location	Models the location hierarchy. For example, a building contains a room.
Location	Computer System	A particular location contains a computer system.
Service	Computer System	Business service is hosted by computer system.
Computer System	Operating System	OS is running on computer system.
Service	Application	Business service is implemented by software application.

## CMS Browser User Interface Overview

This section provides a description of the CMS Browser controls and features that enable OM Portal users to access and manage their Configuration Items (CIs).

[Figure 3–1](#) provides an example of the CMS Browser page. The following sections explain the three main areas of the page:

- [Filter Area](#)
- [Groups Area](#)
- [Filtered Results Table](#)

**Figure 3–1 CMS Browser**

The screenshot shows the CMS Browser interface with the following components:

- Filter Bar:** Contains four filters: Category (ComputerSystem), Type (Switch), Model (9216i), and CI Name (gaswctc01a).
- Filter Panels:** Four panels below the filter bar, each with a dropdown menu and a list of items.
  - Category:** ComputerSystem (7), OperatingSystem (1)
  - Type:** Storage (5), Switch (2)
  - Model:** 9216i (2)
  - CI Name:** gaswctc01a (1), gaswctc01b (1)
- Configuration Items:** Below the filter panels, there are four sections labeled "8 Configuration Items", "7 Configuration Items", "2 Configuration Items", and "2 Configuration Items", each with a "Show Result" button.
- Groups:** A section labeled "Groups" with a dropdown menu.
- Filtered Results:** A table showing the results of the filter.
 

#	Customer	CI Name	Status	Category	Type	Make/Model
1	AT&T Rexam	gaswctc01a	Staging	ComputerSystem	Switch	Cisco/9216i

## Filter Area

Use the Filter option to select multiple CIs based on multiple criteria. There are four filters in CMS Browser. Each filter consist of the following elements:

- List of filter parameters
  - Status  
Status of the CI, such as Staging, Production, or Retired.
  - Category  
Category of the CI, such as Physical Element, Computer System, Application System, Operating System, or Service.
  - CI Name  
Name of the CI.
  - Make  
The vendor or manufacturer for the CI, such as Oracle or IBM.
  - Model  
The model of the CI, such as Sun Fire E25K. This option depends on the value of the Make parameter.
  - Type  
The type of CI, such as Server or UNIX.

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**Note:** You can specify multiple filter parameters in any order. For each filter, the set of options displayed in the list depends on the previously selected filter options

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- The Filter text box  
To refine your search, enter a desired value in the Filter text box
- List of items that match the specified conditions

Select an item to reduce the results

- Show Result link

Select an item from the list and then click **Show Result**.

The system displays the CIs for the selected item in the Filtered Results table.

**Groups Area** Use the Groups option to group CIs. Instead of managing inventory as a set of individual CIs, you can group them together logically and associate functions or attributes at the group level. This minimizes CMS administration work and increases data quality in CMS.

The Groups option contains the following two group types:

- Smart CI Groups

Smart CI groups are defined by a set of criteria. OM Portal maintains the exact list of CIs automatically in each smart group. In the CMS Browser, these group names are displayed in the Smart Groups page in the Groups area.

- Static CI Groups

Static CI groups are defined by the exact list of CIs. Users must add or remove CIs manually to the Static CI groups. In the CMS Browser, these group names are displayed in the Static Groups page in the Groups area

### Filtered Results Table

The result set of CIs that meets the filtering criteria or belongs to the selected CI group. Click any column to reorder the list. Click the name of the CI to access the Configuration Item Dashboard. From the Configuration Item Dashboard, you can view the CI information. For more information about the Configuration Item Dashboard, see "[About the Configuration Item Dashboard](#)".

## Using the CMS Browser

CMS Browser provides OM Portal users with a variety of ways to locate and access CIs using both filtering and grouping features.

CMS Browser enables you to perform a number of tasks including the following:

- [Search and View Configuration Items](#)
- [Export CI Information to Spreadsheets](#)

### Search and View Configuration Items

Use this procedure to search for CIs you are authorized to access. Use a set of filters that enables you to customize the search criteria to fit your requirements based on one or more CI parameters. Use the following CI parameters as search criteria:

Parameter	Value
CI Name	Name of a CI.
Status	Staging, Production, Retired, Lab, No service.
Category	Computer System, Application System, Operating System, Service.
Make	CI vendor or manufacturer: Oracle, IBM, HP, and so on.
Model	CI model, for example, "Sun Fire E25K", "Ultra 20", and so on.

---

---

**Note:** The current list of CI parameters will be extended in future product releases.

---

---

To search and view a CI:

1. Log in to OM Portal.  
The Dashboard page appears.
2. From the Dashboard page, select **CMS Browser** from the **CMS** menu.  
The CMS Browser page appears.
3. For each filter, specify one or more search criteria:
  - a. From the filter list, select the appropriate CI parameter.
  - b. In the Filter box, enter the parameter value (or its part) to narrow the search.  
A list of items meeting the filter criteria appear.
  - c. In the list, click the item you want to use to narrow the search criteria.
  - d. To apply the current filter criteria, click **Show Results**, or move to the next filter to specify the next search criteria.
4. After you set and apply all required filter parameters, click **Show Result**.  
The list of CIs meeting your search criteria appears in the Filtered Results table.  
You can view the following information for each CI:
  - CI Name
  - Status
  - Category
  - Type
  - Make/Model
5. From the CI Name column, click the name of the CI that you want to view.  
The Configuration Item Dashboard page appears with information about the selected CI.

## Export CI Information to Spreadsheets

CMS Browser enables you to export lists of CIs parameters to CSV or Microsoft Excel format.

To export CI data to Excel or CSV format:

1. Search for CIs you want to export as described in ["Search and View Configuration Items"](#).
2. From the Filtered Results table, select the CIs to be exported. Click **Select All** if you want to export all the CIs from the table.
3. Depending on the required format, click **excel** or **csv**.
4. Select the **Open with** option to review the CI data, or the **Save File** option to save the file, and then click **OK**.



## About the Configuration Item Dashboard

The Configuration Item Dashboard provides OM Portal users with the ability to view and administer their CIs.

This section describes the following tasks:

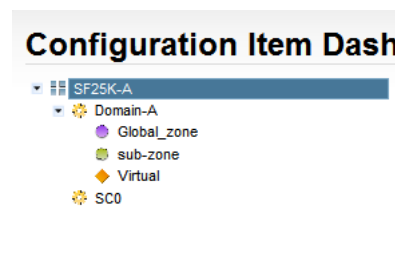
- [Using the CI Tree](#)
- [Viewing CI Parameters](#)
- [Viewing Tickets](#)
- [Viewing CI Groups](#)
- [Viewing the Location of a CI](#)
- [Viewing Vendor Support Contracts](#)
- [Checking Production Readiness](#)
- [Viewing the Properties of a CI](#)
- [Viewing Attachments](#)

### Using the CI Tree

The Configuration Item Dashboard displays the CIs for the selected system in a hierarchal tree in the upper left of the page as shown in [Figure 3–2](#).

The Physical Element is a top-level CI, and Computer Systems, Operating System, Application Systems, and Services are the subordinates.

**Figure 3–2 Configuration Item Tree**





### Viewing CI Parameters

When you select a CI from the CI tree, OM Portal displays the information about that CI in the Details area of the Configuration Item Dashboard page. In this area, you can view both mandatory and optional CI attributes, such as name, category, and status.

### Checking Production Readiness

Use the Production Readiness area to check if the selected CI is ready for production. It uses the following icons to provide status information:

	The specified requirement is met and is ready for production.
	The specified requirement is not met and must be completed successfully before production.

## Viewing Tickets

Use the Tickets area to view any Incident tickets or Change Management (CM) tickets associated with the selected CI.

## Viewing IP Addresses

Use the IP Addresses area to view IP Addresses for a Computer System CI. The IP Address is associated with a Computer System and is the same for all its subordinate CIs.

## Viewing Type of Service and Level of Service

Use the Type of Service area to view the Type of Service (TOS) and Level of Service (LOS) assigned to the selected CI.

## Viewing the Properties of a CI

Use the Properties area to view additional properties for the selected CI. OM Portal contains a predefined list of properties for a service delivery organization. For each property, OM Portal indicates whether the property is visible to service delivery users only or to all users.

## Viewing the Location of a CI

Use the Location area to view the facility assigned to the selected CI.

## Viewing Vendor Support Contracts

Use the Vendor Support Contracts area to view the vendor support contracts associated with the selected CI.

## Viewing Protocol Services

Use the Protocol Services area to view the protocols assigned to a CI. A CI can have one or more assigned protocols depending on the actions that a user can perform in the JumpGate application, or the level of security required for this CI.

## Viewing CI Groups

Use the CI Groups area to view the list of CI Groups to which the selected CI is assigned.

## Viewing Attachments

Use the Attachments area to view and download files associated with the selected CI.

## Viewing or Modifying CI Attributes

To view CI attributes from the Configuration Item Dashboard:

1. Locate the required CI following the steps in the [Search and View Configuration Items](#) section.
2. From the Filtered Results table, click the CI Name you require.

The Configuration Item Dashboard page appears with the information of the selected CI.

3. From the Configuration Item Dashboard page, click the CI you want to view or modify.

---

**Note:** The view in the hierarchy list depends on your user role in OM Portal.

---

## Viewing CI Facilities

The Facilities page enables you to do the following tasks:

- [View a Facility](#)
- [View Cages and Racks](#)

### View a Facility

To view CI facilities:

1. From the **CMS** menu, select **Facilities**.  
The **Facilities** page appears with a list of facilities.
2. Use the Name, State, or Country columns to reorder the results.

### View Cages and Racks

To view and update the cage and racks:

1. From the **CMS** menu, select **Facilities**.  
The **Facilities** page appears with a list of facilities.
2. Locate the facility containing the required cage and racks, then click **Cages and Racks**.  
The Cages and Racks page appears.
3. From the Facility list, select the facility where the cage is located.
4. From the Cage list, select the cage where the rack is located.
5. From the Rack list, select the required rack.

OM Portal displays the rack configuration, showing you the slots to which the CIs are assigned.

## Viewing Vendor Support Contracts

This section describes how to view contracts between customers and external vendors to support CIs monitored by Oracle. A Vendor Support Contract contains all the information required to connect to a particular external vendor including a list of CIs covered by the contract.

To view Vendor Support Contracts:

1. From the **CMS** menu, select **Manage Vendor Support Contracts**.  
The Manage Vendor Support Contracts page appears, with a list of Vendor Support Contracts created for your company.

2. Locate the required contract and click the vendor's name.

The View Vendor Support Contract page appears where you can review the information on the selected contract.

---

## Using Incident Management

This chapter covers the following areas.

- [About Incident Ticket Management](#)
- [Searching Incident Tickets](#)
- [Viewing Incident Tickets](#)

### About Incident Ticket Management

When service impacting events occur in an IT environment and require intervention and communication, Operations Management Platform (OM Platform) captures and manages this data within the Incident Management feature. Incident Management enables Oracle engineers to create, route, update, resolve, and close incident tickets. In addition, all incident tickets created from Event Management are available in Incident Ticket Management.

### Ticket Management Dependencies

You can access Incident Ticket Management through Oracle Operations Management Portal (OM Portal) and use it to identify faults in the IT infrastructure. The effective management of incidents is a complex process that requires interaction with many other service management functions, most notably the Change Management and Knowledge Management services. This integration enables you to effectively resolve incidents by rapidly pinpointing their sources and providing controlled implementation of required changes.

#### Incidents and Change Management

The Change Management service assists Incident Management by:

- Providing information about current and future change activity, as well as change history
- Providing controlled implementation of changes
- Providing up-to-date information to customers on progress of change

For example, a request for change (RFC) may be raised to modify the system by resolving the known error identified by the Incident Management service.

#### Incidents and Configuration Item Management

The Configuration Item Management service assists Incident Management by:

- Providing valuable information about how much of the IT infrastructure is affected
- Providing up-to-date information on customers, owner and status of Configuration Items (CI)
- Assisting with identification of incidents of similar CI type

## Searching Incident Tickets

Use this procedure to search for open Incident Tickets. The fields displayed on the Search Incident Ticket page depend on the authorization associated with your OM Portal login.

To search for incident tickets:

1. Log in to OM Portal.  
The Dashboard page appears.
2. From the Incident menu, select **Search IM Ticket**.  
The Search IM Ticket page appears similar to [Figure 4–1](#).

**Figure 4–1 Search IM Ticket Page**

The screenshot shows the 'Search IM Ticket' page. At the top, there's a header 'Ticket Search Criteria'. Below it, there are several input fields: 'Ticket ID:', 'Ticket External Ref ID:', 'Ticket Summary:', and 'CI Name:'. Each field has a small blue question mark icon to its right. There are two red buttons labeled 'SEARCH IM TICKET', one at the top right and one at the bottom right. Below the input fields, there's a section for 'Use Time Frame?' with a checkbox. Underneath, there are two date pickers: 'Creation Date(Start):' and 'Creation Date(End):'. Below these, there's a 'Time Frame:' dropdown menu. Further down, there's a 'Ticket Status:' section with checkboxes for 'Cancelled', 'Closed', 'Draft', 'On Hold', 'Pending Assignment', 'Resolved', and 'WIP'. Below that, there's a 'Ticket Severity:' section with radio buttons for '1', '2', and '3'. There's also a 'Service Interruption?' checkbox. At the bottom, there's a 'Ticket Tag:' dropdown menu. The page is styled with a light gray background and white borders for the form fields.

3. Use any of the following criteria to search for an Incident ticket:

Search Criteria	Description
Ticket ID	The Incident Ticket ID
Ticket Summary	The Incident Ticket summary
Ticket External Ref ID	The reference ticket ID from an external ticketing system
CI Name	The name of the CI associated with the Incident ticket
Use Time Frame	Select <b>Use Time Frame</b> if you want to search within a predefined time period, such as the last 24 hours.

Search Criteria	Description
Creation Date (Start)	Use the calendar icon to select a start date to create a time period within to search. <b>Note:</b> This field is unavailable if you select <b>Use Time Frame</b> .
Creation Date (End)	Use the calendar icon to select a end date for a time period within to search. <b>Note:</b> This field is unavailable if you select <b>Use Time Frame</b>
Time Frame	Select a predefined time period within to search. <b>Note:</b> This field is available only if you select <b>Use Time Frame</b>
Ticket Status	From the Ticket Status area, you can refine the search to select specific ticket status: <ul style="list-style-type: none"> <li>■ Cancelled</li> <li>■ Closed</li> <li>■ Draft</li> <li>■ On Hold</li> <li>■ Pending Assignment</li> <li>■ Resolved</li> <li>■ WIP</li> </ul>
Ticket Severity	From the Ticket Severity area, you can refine the search to select tickets with specific severities.
Service Interruption	The service interruption
Ticket Tag	Select any tags that you want to associate with the search.

#### 4. Select **Search IM Ticket**.

The processing time for any search varies depending on the size of the data file being searched. To decrease processing time, narrow the search by using multiple search fields.

#### 5. OM Portal displays the results in the Ticket Search Results table. Re-sort the data by clicking any column heading.

## Viewing Incident Tickets

Use this procedure to view an Incident Ticket.

#### 1. Log in to OM Portal.

The Dashboard page appears.

#### 2. From the Dashboard page, select **Search IM Tickets** from the **Incident** menu.

The Search IM Ticket page appears.

#### 3. From the Search IM Ticket page, search for Incident tickets as described in ["Searching Incident Tickets"](#).

#### 4. To view an Incident Ticket, locate the Incident Ticket, then click **View**.

The View IM Ticket page appears for the selected Incident Ticket with the WorkLog subpage open.

#### 5. Review the information on the View IM Ticket page as required.

#### 6. Select the following subpages and review the related information.

- Ticket Detail
- Eventlog
- Attachments

---

---

**Note:** Click **CREATE CM TICKET** if you want to create a Change Management (CM) ticket related to the Incident ticket. For information about creating CM tickets, see "[Create Change Management Ticket from an Incident](#)".

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# Using Change Management

This chapter covers the following topics:

- [Creating Change Management Tickets](#)
- [Searching Change Management Tickets](#)
- [Viewing Change Management Tickets](#)
- [Updating Change Management Ticket](#)
- [Assigning Change Management Tickets](#)
- [Submitting Change Management Tickets](#)
- [Approving Change Management Tickets](#)
- [Scheduling Change Management Tickets](#)
- [Starting Change Management Tickets](#)
- [Completing Change Management Tickets](#)
- [Closing Change Management Tickets](#)
- [Canceling Change Management Tickets](#)

## About Change Management

Change Management enables you to manage changes from the initial request to the final review. You can use the Change Management service to:

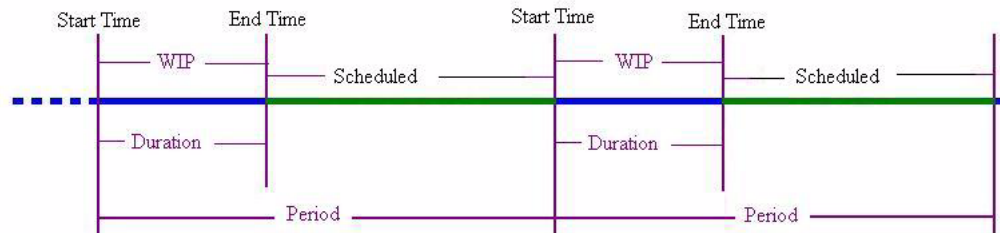
- Raise and record Change Management (CM) requests
- Assess the impact, cost, benefit and risk of a change
- Obtain proper approval for CMs
- Manage the implementation of the CM
- Monitor and report on the implementation
- Review and close CMs

The Change Management system manages all configuration items (CIs) associated with a customer account. In fact, any asset that exists in the customer production environment and is part of the monitored and managed services within Operations Management Platform (OM Platform) is placed under change control.

## Example of Simple Recurring CM ticket

The figure below illustrates an example of a recurring CM ticket given the following parameters: Recurring= Yes | Start time =10am | Duration =1 day | No end date

The expected outcome, once these parameters are set, is for the CM ticket to recur every day and indefinitely during the same two hour time frame.



## Creating Change Management Tickets

Use one of the following procedures to create a Change Management (CM) ticket. When you create a CM ticket, you specify several attributes that define the type and scope of the change and its classification. You can also specify the target CIs and assets of the change and other information that helps define the change. A CM ticket proposes a change that you want made to one or more CIs that are registered to the Configuration Management System (CMS) in OM Portal. The CM ticket sets the change process in motion.

---

---

**Note:** Recurring maintenance activity must be added as recurring change requests by setting the Recurring flag to **Yes**. OM Portal sends an automated e-mail when a recurring maintenance CM ticket is initially submitted, approved, and when the final instance of the CM ticket is completed.

The status of recurring CM tickets alternates between WIP (work-in-progress) and SCHEDULED until the final instance is completed. For information about recurring tickets, see [Example of Simple Recurring CM ticket](#)

---

---

You can create a CM ticket using one of the following methods:

- [Create a New Change Management Ticket](#)
- [Clone a Change Management Ticket](#)
- [Create Change Management Ticket from an Incident](#)

### Create a New Change Management Ticket

Use this procedure to create a new CM ticket:

1. Log in to the Oracle Operations Management Portal.  
The Dashboard page appears.
2. From the Change menu, select **Create CM Ticket**.  
The Create CM Ticket page appears.

3. In the Change Identification area, define the following information:

- a. From the Change Priority list, select the priority level, which determines the relative importance of the change in relation to other outstanding change requests:
  - Planned: Changes that follow the usual change management process, often referred to as work requests.
  - Urgent: Unplanned changes that are expedited and managed outside of the standard CM process, and may require to be implemented outside of the regular change maintenance window.

---

**Note:** Urgent changes are worked through the Control Center usually but not always.

---

- Emergency: Changes resulting from incidents that impact the customer environment. Emergency CM tickets are implemented in real time, with approval not being necessary if the impact of the fix is less than or equal to the current impact to the customer environment.

---

**Note:** For Emergency CM tickets, customer approvals are bypassed and OM Portal notifies the support center by e-mail. You must enter the related Incident Ticket ID on the CM page before you can submit an Emergency CM ticket.

---

- b. From the Change Category list, select the category of the CM ticket. The category determines the difficulty and impact of the CM ticket:
  - Major: Major changes to system functionality.
  - Minor: Has low impact and requires few resources.
  - Standard: Follows established and documented approach.
- c. From the Classification list, select the area that indicates the origin of the changes:
  - Build: Indicates changes from implementation or pre-production
  - Customer - *OMP area*: Indicates changes from the customer relating to a specific area of Oracle Operations Management Platform.
  - Support - *OMP area*: Indicates changes from the Oracle Service Delivery team relating to a specific area of Oracle Operations Management Platform.
- d. From the SubClass list, select a subclass to associate the classification selected in step c. For example, if you selected Customer - Account Management in step c, then the possible subclass values are:
  - Account Information Changes - Address, Contacts
  - Knowledge Article - Add, Delete, Update
  - User Accounts - Add, Invite, Delete Update

4. In the Requestor area, define the following information:

- a. From the Owner list, select the individual responsible for the CM ticket (accepting requests for change and following established processes to implement the changes).

---

---

**Note:** The Owner is a registered user in OM Portal, but the implementor of the CM ticket might not be a registered user.

---

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- b. From the Implemented By list, select who is responsible for the individual implementation steps, including building and testing the change.

---

---

**Note:** The Service Provider option is for internal use only.

---

---

- c. Enter the user name of the person responsible for implementing the CM ticket.
  - d. In the Implementor Contact box, enter the contact information for the person responsible for implementing the CM ticket.
  - e. In the Support Resource box, enter the user name of the named support resource assigned to the CM ticket.
  - f. In the Contact Info box, enter the contact information for the named support resource.
  - g. From the Risk list, select the risk level associated with implementing the CM ticket. Choose one of the following options:
    - High: Major business impact or high user impact.
    - Medium: Minor impact to application and users and easy to back out.
    - Low: Routine day-to-day changes with minimal impact.
  - h. From the Probability list, select the probability that the risk will occur.
5. In the Description area, define the following information:
- a. In the Summary box, enter a descriptive title for the CM ticket being submitted. Use words that will aid in future searches and to link this CM ticket to others like it. ((Maximum of 80 alphanumeric characters.)
  - b. In the Description box, enter a clear and concise description of the change including the nature and scope of the work to be performed
  - c. In the Reason For Change box, enter a description of the reason for the change you want made.
6. In the CI and CI Groups area, identify the configuration items impacted by the change.
- a. Click **Add**.

The Select CI(s) window appears.
  - b. From the filter list, select the appropriate CI parameter.
  - c. In the list, click the item you want to use to narrow the search criteria.
  - d. To apply the current filter criteria, click **Show Results**, or move to the next filter to specify the next search criteria.

The list of CIs matching your search criteria appears in the Filtered Results area.

- e. Select the required CI, then click **Add Selected**.
  - f. Repeat these steps until you have all the required CIs, then click **SUBMIT**.  
The Create CM page appears with a new row in the CI & CI Group table.
7. In the Change Information area, define the following information as required:
- **Filter**  
Select **Filter** to filter events for the CIs associated with this CM ticket from the Support Center screens. Events for the associated CIs will be ignored during the change process.
  - **Timing is Critical**  
Select **Timing is Critical** to enable OM Portal to display a warning about impacts on the change process. When this option is selected, the scheduled period for implementation cannot be modified once the ticket has been approved. To reschedule the ticket, it must be reapproved.
  - **Monitoring Impacted**  
Select **Monitoring Impacted** to indicate that monitoring services are impacted as a result of this change request.
  - **Inventory Impacted**  
Select **Inventory Impacted** to indicate that inventory (CIs) are impacted as a result of this change request.
  - **Backups Impacted**  
Select **Backups Impacted** to indicate that backup services are impacted as a result of this change request.
8. In the Scheduling area, define the following information:

---

**Note:** You must have appropriate permissions to enter the scheduling information for the CM ticket you are creating. Otherwise, you cannot enter scheduling information.

---

- a. Set **Recurring** to either Yes or No depending on whether the CM ticket requires recurring maintenance.

You can create a recurring ticket to implement repetitive and planned tasks, such as backups and regular reboots, for CIs.

If you indicate that the CM ticket is recurring, then OM Portal filters alerts for the specified CIs.

---

**Note:** The status for recurring change requests alternates between WIP and Scheduled until the final scheduled implementation task is completed.

---

If you selected Yes, then enter the following information:

- In the Recurring Period box, enter how often the CM ticket requires maintenance and select the unit of time from the list.

- Set **Infinite Recurring** to Yes or No depending on whether the CM ticket requires maintenance infinitely. If you select No, then the Recurring End Date field appears.
  - In the Recurring End Date box, click the Calendar icon beside the Recurring End Date box. In the Calendar, select the date on which recurring maintenance on the CM ticket will end.
- b. In the Requested Date box, click the Calendar icon beside the Requested Date box. In the Calendar, select the date that the change was requested, then click **Apply**.

---

**Note:** OM Portal displays the local time zone abbreviation beside the date. This time zone is set from the **My Preferences** menu item in **Accounts**. For more information, see "[Managing User Preferences](#)".

---

- c. In the Scheduled Start Date box, click the Calendar icon beside the Scheduled Start Date box. In the Calendar, select the date on which work on the change request will begin, then click **Apply**.

---

**Note:** OM Portal displays the local time zone abbreviation beside the date. This time zone is set from the **My Preferences** menu item in **Accounts**. For more information, see "[Managing User Preferences](#)".

---

- d. In the Scheduled Duration box, enter the amount of time scheduled to complete the CM ticket and select the unit of the time from the list.
- e. Click the time zone link beside Local Timezone for DST Calculation to set the local time zone for Daylight Saving Time (DST). OM Portal displays a confirmation window, reminding you that this setting is for DST calculations only. Click **OK** to continue.
9. In the Related Tickets area, define the following information:
- a. In the Related ID box, enter the ID of the related Incident ticket.
  - b. In the External ID box, enter the ID of an external related ticket from a third-party ticketing system.
10. In the Plan area, define the following information if required:
- a. In the Implementation Plan box, describe how the CM ticket will be implemented.
  - b. In the Test Plan box, describe how the CM ticket will be tested including detailed test scenarios, expected results, actual results, pass or fail.
  - c. In the Backout Plan box, describe how to restore back to the original state if the implementation plan fails
  - d. In the Dependencies box, list the items that are required and their relationships, which are dependent on each other and potentially impact each other during the CM ticket implementation.
11. You can save the CM ticket as a draft or submit the CM ticket.
- To save the CM ticket, click **SAVE AS DRAFT**.
- OM Portal performs the following actions on the CM ticket you created:

- Saves the CM ticket in the database.
- Adds the name of the submitter and the submission date to the CM ticket.
- Assigns an ID to the CM ticket.
- Advances the CM ticket to Draft status.
- Notifies the Change Implementer.

The e-mail notification contains an embedded hyperlink to the CM ticket.

- To submit the CM ticket, click **SUBMIT**.

OM Portal performs the following actions on the CM ticket you created:

- Saves the CM ticket in the database.
- Adds the name of the submitter and the submission date to the CM ticket.
- Assigns an ID to the CM ticket.
- Advances the CM ticket to the next step in the work flow.
- Notifies the following parties:

Change Implementers

Change Owner

Change Requester

E-mail Subscriber List

The e-mail notification contains an embedded hyperlink to the CM ticket.

## Clone a Change Management Ticket

Cloning enables you to copy an existing CM ticket to create a new CM ticket for a customer organization. When you clone a CM ticket, OM Portal displays the Create CM Ticket page with all the fields prepopulated from the existing CM ticket you cloned. You must review the information on the page and modify the data as appropriate.

To clone an CM ticket:

1. Log in to the Oracle Operations Management Portal.

The Dashboard page appears.

2. From the Change menu, select **Change**.

The Change Management page appears.

3. Locate the CM ticket that you want to clone, then click **View** or **Update**.

The View CM Ticket or Update CM Ticket page appears.

4. Click **CLONE**.

The Create CM Ticket page appears with the information copied from the existing CM ticket you cloned.

---

**Note:** OM Portal does not copy any time or date information or schedule-related data from the existing CM ticket.

---

5. Review and modify the information on the Create CM Ticket page as required. For more information about the data on this page, see ["Create a New Change Management Ticket"](#).
6. You can save the CM ticket as a draft or submit the CM ticket.
  - To save the CM ticket, click **SAVE AS DRAFT**.

OM Portal performs the following actions on the CM ticket you created:

    - Saves the CM ticket in the database.
    - Adds the name of the submitter and the submission date to the CM ticket.
    - Assigns an ID to the CM ticket.
    - Advances the CM ticket to Draft status.
    - Notifies the Change Implementer.

The e-mail notification contains an embedded hyperlink to the CM ticket.
  - To submit the CM ticket, click **SUBMIT**.

OM Portal performs the following actions on the CM ticket you created:

    - Saves the CM ticket in the database.
    - Adds the name of the submitter and the submission date to the CM ticket.
    - Assigns an ID to the CM ticket.
    - Advances the CM ticket to the next step in the work flow.
    - Notifies the following parties:
      - Change Implementers
      - Change Owner
      - Change Requester
      - E-mail Subscriber List

The e-mail notification contains an embedded hyperlink to the CM ticket.

## Create Change Management Ticket from an Incident

For some incident tickets, the Support Center engineer may decide to open a CM ticket. Note that you can create several CM tickets from one incident ticket.

When you create a CM ticket from an Incident ticket, OM Portal copies the following data from the Incident Ticket and populates the corresponding fields on the Create CM Ticket page:

- Organization
- Related ID
- External ID
- CI and CI Groups

---

**Note:** CM tickets can be created from any Incident ticket except tickets in Draft status.

---

To create a CM ticket from an existing Incident ticket:



1. Log in to OM Portal.

The Dashboard page appears.

2. From the Incident menu, select **Search IM Tickets**.

The Search IM Ticket page appears.

3. Use "[Searching Incident Tickets](#)" to search for the Incident ticket.

4. Click **View** beside the required ticket.

The View IM Ticket page appears.

5. Click **CREATE CM TICKET**.

The Create CM Ticket page appears with the information from the Incident ticket.

---

**Note:** OM Portal copies the following information only:

- Organization
  - Related Incident ticket ID
  - External ID
  - CI and CI Groups
- 

6. Review and modify the information on the Create CM Ticket page as required. For more information about the data on this page, see "[Create a New Change Management Ticket](#)".

7. You can save the CM ticket as a draft or submit the CM ticket.

- To save the CM ticket, click **SAVE AS DRAFT**.

OM Portal performs the following actions on the CM ticket you created:

- Saves the CM ticket in the database.
- Adds the name of the submitter and the submission date to the CM ticket.
- Assigns an ID to the CM ticket.
- Advances the CM ticket to Draft status.
- Notifies the Change Implementer.

The e-mail notification contains an embedded hyperlink to the CM ticket.

- To submit the CM ticket, click **SUBMIT**.

OM Portal performs the following actions on the CM ticket you created:

- Saves the CM ticket in the database.
- Adds the name of the submitter and the submission date to the CM ticket.
- Assigns an ID to the CM ticket.
- Advances the CM ticket to the next step in the work flow.
- Notifies the following parties:

Change Implementers

Change Owner

Change Requester

E-mail Subscriber List

The e-mail notification contains an embedded hyperlink to the CM ticket.

Searching Change Management Tickets

Use this procedure to search for CM tickets. The displayed results depend on your role within OM Portal.

To search for a CM ticket:

- 1. Log in to the Oracle Operations Management Portal.  
The Dashboard page appears.
- 2. From the Change menu, select **Search CM Ticket**.  
The Search CM Ticket page appears similar to [Figure 5–1](#).

Figure 5–1 Search CM Ticket Page

Search CM Ticket

« Search Criteria

Ticket ID:

External ID:

Related ID:

CI Name:

Date Type: 

Creation Date

Begin Date:

Time Frame: 

— All —

End Date:

Ticket Status: 

— All —

Recurring: 

Both

Organization: 

— All —

Owner: 

— All —

Implementor:

SEARCH

- 3. From the Search CM Ticket page, you can use any of the following criteria to search for a CM ticket:

Search Criteria	Description
Ticket ID	CM ticket ID
Related ID	Related Incident ticket ID if applicable
External ID	Reference ticket ID from an external ticketing system
CI Name	Name of a CI associated the CM ticket
Date Type	From the Date Type list, select the type of date by which you want to search.
Time Frame	Select a predefined time period within to search.
Begin Date	Use the Calendar icon to select a start date to create a time period within which to search.  <b>Note:</b> The Begin Date is available only when you select <b>Custom</b> from the Time Frame list.
End Date	Use the Calendar icon to select an end date for the time period within which to search.  <b>Note:</b> The End Date is available only when you select <b>Custom</b> from the Time Frame list.

Search Criteria	Description
Ticket Status	From the Ticket Status list, select the status of the CM ticket or select <b>All</b> to search for CM tickets of all status.
Recurring	From the Recurring list, select whether you want to search for recurring CM tickets, nonrecurring CM tickets, or both.
Implementor	Enter the name of the implementor to associate with the search.
Owner	From the Owner list, select the CM ticket owner that you want to associate with the search.

4. Click **SEARCH**.

The processing time for any search varies depending on the size of the data file being searched. To decrease processing time, narrow the search by using multiple search fields.

OM Portal displays the results in the Ticket Search Results table.

5. Re-sort the results by clicking the Ticket ID column or the Creation Date column.

## Viewing Change Management Tickets

To view a CM ticket:

1. Log in to the Oracle Operations Management Portal.

The Dashboard page appears.

2. From the Change menu, select **Change**.

The Change Management page appears.

3. Select a CM ticket to view using any of the following methods:

- The Change Management page displays a list of CM tickets pending action from which you can choose. Click the ticket number or View.
- Use the Search feature as described in "[Searching Change Management Tickets](#)". From the Ticket Search Results area, click the ticket number or View.

The CM ticket page appears with the selected CM ticket information.

4. Review the information on the CM ticket page as required.

5. Select the WorkLog tab from the top of the CM ticket page.

The WorkLog page appears.

6. Review the information on the Worklog page as required.

7. Select the Attachments tab from the top of the CM ticket page.

The Attachments page appears.

8. Review the attached files on the Attachment page as required.

## Updating Change Management Ticket

Use this procedure to update a CM ticket. Information in a CM ticket is often revised during the life cycle of the CM ticket. Among other changes to a CM ticket, you can update the status for a CM ticket and log comments in your CM ticket to track its progress, add or delete CIs from a CM ticket, assign the CM ticket to an individual or

group who will implement the change, schedule a CM ticket for implementation, and add attachments to the CM ticket.

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**Note:** Users with the appropriate permissions can select a CM ticket to update. When you select a CM ticket to update, OM Portal displays actions that you can perform on the CM ticket such as submit, approve, schedule and cancel.

Some actions, such as approval, are restricted to specific user authorizations

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To update a CM ticket:

1. Log in to OM Portal.

The Dashboard page appears.

2. From the Change menu, select **Change**.

The Change Management page appears.

3. Select a CM ticket to view using any of the following methods:

- The Change Management page displays a list of CM tickets pending action from which you can choose, then click **Update**.
- Use the Search feature as described in "[Searching Change Management Tickets](#)". From the Ticket Search Results area, click the ticket number or **Update**.

The Update CM ticket page appears.

4. Update the information on the Ticket Details subpage as required. For information about this page, see "[Create a New Change Management Ticket](#)".
5. From the top of the CM ticket page, select the WorkLog tab.

The WorkLog page appears.

6. To add a worklog entry (available only to users with the appropriate permissions), do the following:

- a. Select **New Entry**.

A free-text box appears.

- b. Add your worklog entry in the text field as appropriate. The free text field enables you to track the progress of the CM ticket throughout its life cycle.

- c. Click **ADD** to add your worklog entry to the CM ticket. If you receive any errors, make the necessary corrections, and then submit your entry again. After successfully adding your entry, OM Portal does the following:

- Updates the CM ticket with your worklog entry
- Displays your entry in the Worklog List at the bottom of the page
- Notify the CM ticket's subscriber list and customer contact by e-mail.

- d. If appropriate, add another worklog entry. You can create as many worklog entries as required.

- e. After adding the worklog entries, click **UPDATE**.

7. From the top of the page, select the Attachments tab.

The Attachments page appears.

8. On the Attachments page, do the following:
  - a. Review the files that are displayed for the CM ticket. Click **View** to view the file.
  - b. If required, attach a file to the ticket. Click **Add Files** to attach a file to the CM ticket.
  - c. After reviewing the attached files, click **UPDATE**.

## Assigning Change Management Tickets

Use this procedure to assign an implementor to a CM ticket. A CM ticket may be implemented by either an Oracle service delivery engineer or an end-user.

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**Note:** The CM ticket assignment sends an automated e-mail to the appropriate Approver, who must review and approve the CM ticket before it can be scheduled for implementation. If the ticket has been re-assigned to a new Change Implementor, then the system notifies both the former and current Implementors.

---

To assign the CM ticket:

1. Log in to OM Portal.

The Dashboard page appears.

2. From the Change menu, select **Change**.

The Change Management page appears.

3. On the Change Management page, find the CM ticket you want to assign, then click **Update**.

The Update CM Ticket page displays.

4. Locate the Implemented By field, and if it set to Customer or Multiple Parties, then enter the name of the individual responsible for performing the implementation tasks. The individual does not have to be a registered user in OM Platform.
5. Once the appropriate assignment is made, click **UPDATE**.

At this point, the CM ticket is ready to be approved or scheduled for implementation depending on whether this CM ticket is implemented by the Oracle service delivery engineer or by the customer.

6. The action of assigning the CM ticket causes OM Portal to do the following:

- Check that all mandatory fields are populated with valid data.
- Save the CM ticket in the database.
- Update the CM ticket Worklog with the assignment entry.
- If the CM ticket is implemented by the Oracle service delivery engineer, OM Portal updates the CM ticket status to Pending Approval and sends an e-mail notification to the assigned implementor. If the CM ticket is implemented by the customer or multiple parties, then OM Portal updates the CM ticket status to Pending Scheduling.

## Submitting Change Management Tickets

The CM ticket is in Draft status, which means that the CM ticket has been created and saved, but not submitted. You can submit a CM ticket by selecting the CM ticket you want to submit and clicking **Update**. You must have the appropriate permissions to create and submit a CM ticket. In addition, you can submit a CM ticket only if you've entered valid information in all mandatory fields.

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**Note:** For Emergency CM tickets, you are required to enter the Related Incident Ticket ID on the CM ticket page before you can successfully submit the CM ticket.

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To submit a CM ticket:

1. Log in to the Oracle Operations Management Portal.  
The Dashboard page appears.
2. From the Change menu, select **Change**.  
The Change Management page appears.
3. Locate the CM ticket you want to submit (look for tickets with the status set to Draft); then click **Update**.  
The Update CM Ticket page appears.
4. Ensure that information required to process the CM ticket is entered for the CM ticket. For information about the mandatory fields and valid data required to submit the CM ticket, see ["Creating Change Management Tickets"](#).
5. Click **SUBMIT**.

The Change Management application initiates the Submit work flow. After you submit the CM ticket, correct any errors that are displayed by the submit workflow. If necessary, resubmit the CM ticket.

The action of submitting a CM ticket causes the system to:

- Check that all mandatory fields are populated with valid data.
- Save the CM ticket in the database.
- Add the Submitter Name and Date to the CM ticket.
- Assign an ID to the CM ticket.
- Notify the following: Change Implementor(s), Change Owner, Change Requester and E-mail Subscriber List. The e-mail notification has an embedded hyperlink to the CM ticket making it easy for the recipients to access it.
- Advance the CM ticket to the next step in the work flow.

## Approving Change Management Tickets

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**Note:** You must have the appropriate permissions to approve a CM ticket.

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Use this procedure to review and approve a CM ticket that will be implemented by the service delivery engineer. An approval process helps to ensure that your proposed actions are in tune with company or department strategy, and entitled based on contract with the customer. The Change Management application provides a structured, process-oriented workflow for approving a CM ticket.

A CM ticket must be approved if the party responsible for a CM ticket's individual implementation steps, including building and testing the change, is the service delivery engineer. For example, if you select Service Provider in the CM ticket's Implemented By field, then the CM ticket must be approved before it can be scheduled. In addition, a CM ticket must be in the Pending Approval status before it can be Approved. Once approval occurs, the CM ticket is then an Approved CM ticket and can be scheduled.

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**Note:** After you approve a CM ticket, you cannot edit some of the ticket information such as Description, Reason For Change, and Filter.

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To approve a CM ticket:

1. Log in to OM Portal.

The Dashboard page appears.

2. From the Change menu, select **Change**.

The Change Management page appears.

3. On the Change Management page, find the CM ticket you want to approve (look for CM tickets with the status set to Pending Approval); then click **Update**.

The Update CM Ticket page displays.

4. On the Update CM Ticket page, review the details for the CM ticket and then do one of the following:

- a. Select the Approve button to approve the CM ticket. The action of approving a CM ticket causes OM Portal to do the following:

- Check that all mandatory fields are populated with valid data.
- Save the CM ticket in the database.
- Update the CM ticket Worklog with the approval action and name of the user who approved the CM ticket.
- Notify the following: Change Implementor(s), Change Owner, Change Approver, and Email Subscriber List. The e-mail notification has an embedded hyperlink to the CM ticket making it easy for the recipients to access it.
- Advance the CM ticket to the Pending Scheduling status. When you click Approve, the Change Management service application starts the Approve work flow. Correct any error conditions indicated by the workflow, and then approve the CM ticket again, if needed. After you successfully approve the CM ticket, its status will be PENDING SCHEDULING.

- b. Select **REJECT**. The action of rejecting a CM ticket causes the system to:

- Save the CM ticket in the database
- Update the CM ticket Worklog with the reject action and name of the user who rejected the ticket

- Notify the following: Change Implementor(s), Change Owner, Change Requester, Change Approver, and Email Subscriber List. The e-mail notification has an embedded hyperlink to the CM ticket making it easy for the recipients to access it.
- Reverts the CM ticket back to the Draft status

## Scheduling Change Management Tickets

Use this procedure to schedule a CM ticket for automatic implementation. CM tickets can be scheduled to start either automatically by OM Portal or manually by clicking the Start action button. Changes are scheduled for automatic implementation to accommodate business needs or resource constraints; on the other hand you may need to manually start an implementation immediately for an emergency CM ticket.

You may also schedule CM tickets for automatic implementation to occur on a regular basis (recurring CM ticket). You can create a recurring CM ticket to implement repetitive and planned tasks, such as backups and regular reboots, on configuration items. You can specify an hourly, daily or weekly change recurring period.

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**Note:** You must have the appropriate permissions to schedule a CM ticket.

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Before you begin:

- To schedule the CM ticket, the ticket must be in the Pending Scheduling status.
- If the CM ticket is implemented by the Service Provider, then the Service Provider must review and approve the change before it can be scheduled.

To schedule a CM ticket:

1. Log in to OM Portal.

The Dashboard page appears.

2. From the Change menu, select **Change**.

The Change Management page appears.

3. Locate the CM ticket you want to schedule (look for CM tickets with the status set to Pending Scheduling); then click **Update**.

The Update CM Ticket page appears.

4. Make sure the CM ticket has been assigned to a service queue and/or person responsible for the individual implementation steps. (The CM ticket must be assigned before you can schedule it). For more information, see "[Assigning Change Management Tickets](#)".

5. In the Change Information area, specify whether to filter events for the impacted CIs by selecting **Filter**.

During the change window specified, CM tickets with filtering selected, will cause all events associated with the affected CIs to be filtered from reaching the Event Manager screens. When the work is completed, the support engineer may either manually set the CM ticket status to Completed or the system sets it to Completed when the scheduled duration time is reached. Once in a Completed status, all events are again shown on the Event Manager console screens.



6. In the Scheduling area, enter the information that is needed to set the implementation schedule for the CM ticket.
  - a. Set **Recurring** to either Yes or No depending on whether the CM ticket requires recurring maintenance.  
 You can create a recurring CM ticket to implement repetitive and planned tasks, such as backups and regular reboots, on configuration items.  
 If you indicate that the CM ticket is recurring, then OM Portal filters alerts for the specified CIs.  
 Note that the status for recurring CM tickets alternates between WIP and Scheduled until the final scheduled implementation task is completed.
  - b. In the Scheduled Start Date field, click the Calendar icon beside the Start Date field.
  - c. In the Calendar window, specify the date you want to start implementing the CM ticket, then click **Apply**.
  - d. In the Scheduled Duration field, enter the duration for implementing the CM ticket by typing a numeric value and then selecting the time unit from the drop-down window in minutes, hours, or days. Note: You may set the Scheduled Duration to 0 (zero).
  - e. Click **Schedule** when you are satisfied with the schedule.

OM Portal performs the following:

- Sets the CM ticket status to Scheduled.  
 OM Portal waits for start date specified in the Scheduled Start Date field. Once the start date is reached, the CM ticket status is automatically changed to WIP for the duration specified in Scheduled Duration field. After the specified duration, the CM status is automatically changed to Completed. During the WIP period, you may edit the CM ticket and manually change the CM ticket status to Complete by clicking the Complete button.
- Adds a Worklog entry for scheduling
- Triggers the timer for implementation and update the Implementation Start and End Date fields with the actual start and complete time for the CM ticket. The fields are automatically populated by the system when the CM ticket status is updated to WIP and Completed; the fields cannot be edited.
- Notifies the following: Change Implementor(s), Change Owner, Change Requester, Change Approver, and E-mail Subscriber List.  
 The e-mail notification has an embedded hyperlink to the CM ticket making it easy for the recipients to access it. **Note:** No notification is sent to the e-mail subscriber list for CM tickets scheduled as recurring.

---

**Note:** When the CM ticket is scheduled, you may click **START** to start implementing the change ahead of the scheduled time. OM Portal changes the CM ticket status to WIP and adds an entry in the CM ticket Worklog. You can complete the CM ticket manually by clicking **Complete**.

---

## Useful Information

The following table provides useful information about scheduled CM tickets.

Rescheduling a CM ticket	<p>You can modify both the Scheduled Start Time and Duration period for a scheduled CM ticket.</p> <p><b>Note:</b> The Scheduled Start Date cannot be modified once the CM ticket moves to the WIP status.</p>
Completing a Recurring CM ticket between iterations	<p>You can modify the end date and time to the current time. Click the Save button once you've updated the time period.</p>
Updating the ScheduledStartDate	<p>You can set the Scheduled Start Date to a date that is either in the future or to a time that has already past.</p> <p>Setting the Scheduled Start Date to a Future time: If you set the Scheduled Start Date to a future time; then CM ticket status remains in the Scheduled status until the implementation period is reached.</p> <p>Setting the Scheduled Start Time to a Past time: If you modify the Scheduled Start Date to a past time, and then click the Save button, the system changes the CM ticket status to either WIP or Completed depending on whether the duration period has been reached. For example:</p> <ul style="list-style-type: none"><li>■ If you modify the Scheduled Start Date to a past time, but the Duration period has not yet been reached; then the system sets the CM ticket status to WIP. The Implementation Start Date is automatically populated to the current time and the implementation End Date is left blank as it is still waiting for the CM ticket to complete.</li><li>■ If you modify the Scheduled Start Date to a past time, and the Duration period has been reached; then system changes the CM ticket status to Completed and populates the implementation Start Date and End Date with the completed time.</li></ul>
Updating the Scheduled Duration Period	<p>You can update the Scheduled Duration period while the ticket is in the WIP status. You may also choose to set the Scheduled Duration to 0 (zero).</p> <p>Click the Save button once you've updated the Scheduled Duration period. The system will do the following:</p> <ul style="list-style-type: none"><li>■ If the Implementation Start Time AND the new Scheduled Duration period is reached, then the system updates the CM ticket status to Completed and adds an entry in the Worklog for the completed CM ticket.</li><li>■ If the Implementation Start Time AND the new Scheduled Duration period is not reached, then the CM ticket remains in the WIP status. The system moves the CM ticket to the Completed status once the new Scheduled Duration period is reached. You can choose to manually move the CM ticket to the Completed status at any time by clicking the Complete button.</li></ul>

## Starting Change Management Tickets

A CM ticket can be started either automatically by the system or manually by selecting the Start action button. You use the Start action for CM tickets that need to be started immediately, such as Emergency CM tickets.

Once a CM ticket is scheduled, you may click the Start button to start implementing the change ahead of the scheduled time; otherwise the system automatically starts the implementation once the Start Date scheduled for a CM ticket is reached.

---

**Note:** You cannot use the Start action on a recurring CM ticket. Recurring CM tickets must always be scheduled.

---

Before you begin:

- The CM ticket must be in the Scheduled status before you can Start the work period for a CM ticket.
- Make sure you have the appropriate permissions to start a CM ticket.

To manually start a CM ticket:

---

**Note:** Before you can manually start the CM ticket, you must make sure to enter valid values in the start date and time fields as well as the Schedule Duration field. Please note that if you manually start a CM ticket, the system will start the duration timer and follow the duration value as specified in the Scheduled Duration field.

---

1. Log in to the Oracle Operations Management Portal and navigate to the Change menu. The system displays the Change Management page.
2. On the Change Management page, find the CM ticket you want to start implementing (look for CM tickets with the status set to Scheduled); then click Update. The Update CM Ticket page displays.
3. On the Update CM Ticket page, ensure that the CM ticket has been assigned to a service queue and/or person responsible for the individual implementation steps. (The CM ticket must be assigned before you can schedule it):
  - a. If the Implementer Queue field is displayed, select the service queue responsible for the individual implementation steps.
  - b. In the Implementer field, type the name of the individual responsible for performing the implementation tasks.
4. In the Scheduling area, make sure the CM ticket has been scheduled:
  - a. In the Scheduled Start Date field, click the Calendar icon beside the Start Date field. The system displays the Calendar pop-up window.
  - b. In the Calendar window, specify the date you want to start implementing the change request; then click Apply.
  - c. In the Scheduled Duration field, enter the duration for implementing the change by typing a numeric value and then selecting the time unit from the drop-down window in minutes, hours, or days. NOTE: You may set the Scheduled Duration to 0 (zero).
5. Click the Start button to start implementing the change ahead of the scheduled time. When you click Start, the Change Management service application initiates the Start work flow. If you receive any errors, make the necessary corrections, and then start the CM ticket. After successfully starting the CM ticket, its status will change to WIP.
6. The action of starting a CM ticket causes the system to:
  - Check that all mandatory fields are populated with valid data.
  - Save the CM ticket in the database.

- Update the CM ticket Worklog with the name of the user who started the CM ticket.
- Advance the CM ticket to the WIP status.
- Notify the following: Change Implementor(s), Change Owner, Change Requester, Change Approver, and E-mail Subscriber List. The e-mail notification has an embedded hyperlink to the CM ticket making it easy for the recipients to access it. Note: No notification is sent to the e-mail subscriber list for CM tickets scheduled as recurring.

---

**Note:** You may manually complete the CM ticket before the scheduled end time by clicking the Complete button.

---

## Completing Change Management Tickets

CM tickets can be completed either automatically by OM Portal or manually by selecting **COMPLETE**. A CM ticket must be in the WIP status before you can complete the work period for a CM ticket. When a CM ticket is being worked on, you can click **COMPLETE** to complete the work for a CM ticket ahead of the scheduled end time. Otherwise, OM Portal automatically completes the implementation when the scheduled end date for a CM ticket is reached.

---

**Note:** You must have the appropriate permissions to complete a CM ticket.

---

To manually complete a CM ticket:

1. Log in to OM Portal  
The Dashboard page appears.
2. From the Change menu, select **Change**.  
The Change Management page appears.
3. Locate the CM ticket for which you want to complete implementation (look for CM tickets with the status set to WIP), then click **Update**.  
The Update CM Ticket page appears.
4. Click **COMPLETE**.  
The Change Management application initiates the Complete work flow. If you receive any errors, make the necessary corrections, and then complete the CM ticket. After successfully completing the CM ticket, its status changes to Completed.
5. The action of completing a CM ticket causes OM Portal to do the following:
  - Check that all mandatory fields are populated with valid data.
  - Save the CM ticket in the database.
  - Update the CM ticket Worklog with the name of the user who completed the CM ticket.
  - Advance the CM ticket to the Completed status.
  - Notify the following: Change Implementor(s), Change Owner, Change Requester, Change Approver, and E-mail Subscriber List. The e-mail

notification has an embedded hyperlink to the CM ticket making it easy for the recipients to access it.

## Closing Change Management Tickets

CM Tickets can be closed either automatically by OM Portal or manually by selecting the **CLOSE**. A CM ticket must be in the Completed status before it can be closed. In addition, if a post implementation review is required, you must wait to close the CM ticket until after the post implementation review is completed. When a CM ticket is completed, you may click **CLOSE** to close the CM ticket. Otherwise, OM Portal closes the CM ticket automatically when its timestamp reaches 24 hours in the Completed status. Wherever possible, you should always close a CM ticket when work is complete.

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**Note:** You must have the appropriate permissions to close a CM ticket.

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---

To manually close a CM ticket:

1. Log in to OM Portal

The Dashboard page appears.

2. From the Change menu, select **Change**.

The Change Management page appears.

3. Locate the CM ticket you want to close (look for CM tickets with the status set to Completed), then click **Update**.

The Update CM Ticket page appears.

4. Click **CLOSE TICKET**.

When you click **CLOSE TICKET**, the Change Management application starts the Close work flow. If you receive any errors, make necessary corrections, and then close the CM ticket. After successfully closing the CM ticket, its status changes to CLOSED.

5. The action of closing a CM ticket causes OM Portal to do the following:

- Check that all mandatory fields are populated with valid data.
- Save the CM ticket in the database.
- Update the CM ticket Worklog with the name of the user who closed the CM ticket.
- Advance the CM ticket to the Closed status.

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**Note:** You cannot reopen or edit a Closed CM ticket.

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## Canceling Change Management Tickets

You can cancel a CM ticket anytime before its status is set to WIP. You cancel a CM ticket by selecting the CM ticket you want to cancel and clicking the Cancel action button. You must have the appropriate permissions to cancel a CM ticket.

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---

**Note:** You can cancel a recurring CM ticket anytime before its first WIP iteration or during the Schedule status of each iterative period.

---

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To cancel a CM ticket:

1. Log in to OM Portal  
The Dashboard page appears.
2. From the Change menu, select **Change**.  
The Change Management page appears.
3. Locate the CM ticket you want to cancel (look for CM tickets with the status set to Pending Review, Approval or Scheduling), then click **Update**.  
The Update CM Ticket page displays.
4. Click **CANCEL**.  
The Cancel Change Ticket window appears.
5. In the Cancel Reason box, provide a reason for canceling the CM ticket, then click **CANCEL REQUEST**.

The Change Management service application starts the Cancel work flow. If you receive any errors, make necessary corrections, and then cancel the CM ticket. After successfully canceling the CM ticket, its status changes to **CANCELLED**.

The action of canceling a CM ticket causes the system to:

- Check that all mandatory fields are populated with valid data.
- Save the CM ticket in the database.
- Update the CM ticket Worklog with the reason for the canceled ticket and the name of the user who canceled the CM ticket.
- Update the CM ticket status to Canceled.
- Notify the following: Change Implementor(s), Change Owner, Change Requester, Change Approver, and E-mail Subscriber List. The e-mail notification has an embedded hyperlink to the CM ticket making it easy for the recipients to access it.

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## Using Problem Management

This chapter covers the following topics:

- [About Problem Management](#)
- [Searching Problem Management Tickets](#)
- [Viewing Problem Management Tickets](#)

### About Problem Management

Problem Management aims to resolve the root causes of incidents and thus to minimize the adverse impact of incidents and problems on business that are caused by errors within the IT infrastructure, and to prevent recurrence of incidents related to these errors. A problem is an unknown underlying cause of one or more incidents, and a known error is a problem that is successfully diagnosed and for which either a workaround or a permanent resolution has been identified.

The Problem Management process deals with the outcomes of Event, Incident, and Change Management. Its priority is to establish workarounds to minimize the impact of Incidents, and then to reduce the occurrence of the Incidents by systematically eliminating the causes. Problem Management feeds into Knowledge and Change Management with known errors and Requests for Change (RFC).

### Searching Problem Management Tickets

Use this procedure to search for PM Tickets. The displayed results depend on your role within OM Portal.

To search for a PM Ticket:

1. Log in to OM Portal.  
The Dashboard page appears.
2. From the Problem menu, select **Search PM Tickets**.

The Search PM Ticket page appears similar to [Figure 6-1](#), depending on your permissions.

Figure 6–1 Search PM Ticket Page

Search PM Ticket

« Search Criteria

Ticket ID:

Related External ID:

Summary:

Related Incident ID:

Date Type: 

Creation Date

Begin Time:

Time Frame: 

-- All --

End Time:

Customer: 

-- All --

Ticket Status: 

-- All --

Priority: 

-- All --

SEARCH

3. From the Search PM Ticket page, you can use any of the following criteria to search for a PM Ticket:

Search Criteria	Description
Ticket ID	PM Ticket ID
Summary	PM Ticket summary
Related External ID	Reference ticket ID from an external ticketing system
Related Incident ID	Related Incident ticket ID if applicable. <b>Note:</b> You must have appropriate permissions to view this option.
Date Type	From the Date Type list, select the type of date by which you want to search.
Time Frame	Select a predefined time period within to search.
Begin Time	Use the Calendar icon to select a start date to create a time period within which to search.
End Time	Use the Calendar icon to select an end date for the time period within which to search.
Priority	Priority of PM Ticket
Ticket Status	From the Ticket Status list, select the status of the PM Ticket or select <b>All</b> to search for PM Tickets of all status.
Resolution Code	Reason for resolving PM Ticket. <b>Note:</b> This option is available for tickets with a Resolved or Closed status only.

4. Click **SEARCH**.
- The processing time for any search varies depending on the size of the data file being searched. To decrease processing time, narrow the search by using multiple search fields.
- OM Portal displays the results in the Ticket Search Results table.
5. Re-sort the results by clicking the Ticket ID column or the Creation Date column.

## Viewing Problem Management Tickets

To view a PM Ticket:

1. Log in to OM Portal.



The Dashboard page appears.

2. From the Problem menu, select **Problem**.

The Problem Management page appears.

---

**Note:** Beside **Refresh**, click the orange arrow to export the displayed list of PM Tickets to Microsoft Excel or CSV files.

---

3. Select a PM Ticket to view using any of the following methods:

- The Problem Management page displays a list of PM Tickets. Click the ticket number or **View**.
- Use the Search feature as described in "[Searching Problem Management Tickets](#)". From the Ticket Search Results area, click the ticket number or **View**.

The View PM Ticket page appears with the selected PM Ticket information.

4. Review the Ticket Details page as required.



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## Using Summary Reporting

This chapter covers the following topic areas:

- [Report List](#)
- [Generate Availability Reports](#)
- [Generate Event Reports](#)
- [Generate External Reports](#)
- [View Query](#)
- [View Report](#)
- [Subscription Summary](#)

### Report List

The Operations Management Portal (OM Portal) Report List displays all the reports and queries that have been defined in the system for a specific customer. The name of the creator of each report and query is also displayed. These reports and queries contain user-defined data and formatting that can help you focus on specific aspects of your organization's application and infrastructure resource performance. Once saved, the reports and queries are available for viewing by all system users with appropriate permissions.

From the Report List dashboard, you can select to view the report or query for a particular time range. You can generate, edit (if such permissions are granted), delete, and subscribe to different report types. In addition, the Reporting service enables creating reports based on queries that extract data from the Reporting database. You can create, view or delete queries that have been defined for a specific customer such as an availability summary, change ticket summary, incident ticket summary, or organization summary query.

**Figure 7–1 Report List Dashboard**

Report List

Customer: ZZ Template

Begin Time(EDT): 09/23/2010 14:29

End Time(EDT): 09/24/2010 14:29

Reports

Report Name	Creator	Report Type	Download CSV	Edit Report	Delete Report	Subscribe to Report
r0	CSM ROM	Personal	CSV	Edit	Delete	Subscribe
Test3_Monday_BW	CSM ROM	Personal	CSV	Edit	Delete	Subscribe
Operation Summary		Global	CSV			Subscribe
update-09-10-20:UAT:pslrpt-1	96	Global	CSV			Subscribe
09-10-20:UAT:pslrpt-10	itsp.cm.sp2.user1@gmail.com	Global	CSV			Subscribe
09-10-20:UAT:pslrpt-10	rom admin	Global	CSV			Subscribe
pslrpt-1	itsp.cm.sp2.user1@gmail.com	Global	CSV			Subscribe
pslrpt-1	rom admin	Global	CSV			Subscribe
PsIRpt-1	itsp.cm.sp2.user1@gmail.com	Global	CSV			Subscribe
PsIRpt-1	rom admin	Global	CSV			Subscribe
global report 001	rom admin	Global	CSV			Subscribe
Standard Exadata Report	rom admin	Global	CSV			Subscribe
RPT: Customer Dashboard Demo	rom admin	Global	CSV			Subscribe
tw test	142	Global	CSV			Subscribe

Queries

Query Name	Creator	Query Type	Download CSV	Edit Query	Delete Query
BW_Test_Query	CSM ROM	Personal	CSV	Edit	Delete
test ISM data	CSM ROM	Personal	CSV	Edit	Delete
Active Change Ticket Summary		Global	CSV		
Events By Hostname		Global	CSV		

You view reports and queries in any spreadsheet program capable of reading CSV format (Comma Separated Values) files as well as viewing reports online through OM Portal.

## Generate Availability Reports

The Availability Reporting feature collects and analyzes data from the event logs of monitored servers and then generates configurable reports that you can view and customize to suit the needs of your organization. Use these reports to identify the causes for planned and unplanned downtime and take preemptive actions to decrease downtime in the future.

Availability reports calculate the metrics of server availability and a standard report is configured to display the resulting data. Each configuration includes tables or graphs with information about the availability and reliability of servers, devices, and services in the monitored environment. You can enter parameters, such as specific periods of time, to filter the data presented.

Availability reports provide the following advantages:

- Determine whether monitored servers are meeting their availability and reliability objectives.
- Filter reports to track trends by viewing information collected over a specific length of time, such as over a period of months or years.
- Filter reports to view information on a specific subset of monitored servers.
- Identify the best and worst performing computers for a particular area. For example, you can identify which servers suffer the most or least number of system failures.
- Identify problem areas, such as a particular application or operating system version that stops responding.

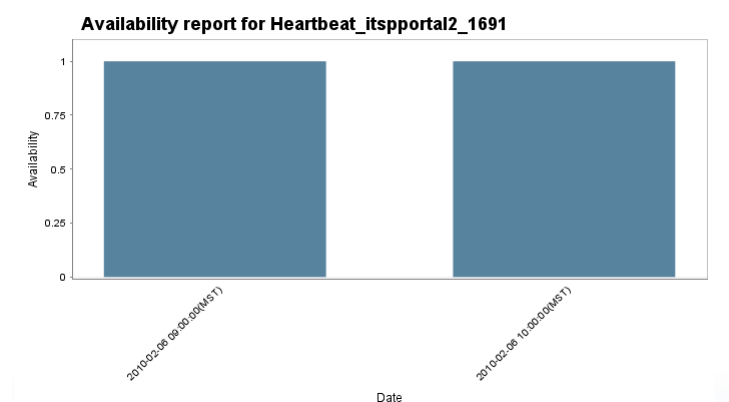
- Gather information about operating systems and applications.

To generate an Availability Report:

1. Log in to OM Portal.  
The Dashboard page appears.
2. From the Reports menu, select **Availability Reports**.  
The Availability Reports page appears.
3. From the Configuration Item list, select the Configuration Item (CI) whose data you want to use to create the report.
4. From the Probe list, select the probe that you want to report upon.
5. In the Start/End Time fields, specify the date and time over which you want the report data to cover.
6. From the Interval list, specify how often you want to create the report.
7. Click **GENERATE** to create the report using the parameters you specified in the steps above.

OM Portal generates an availability report similar to the one shown below.

**Figure 7–2 Example of an Availability Report**



## Generate Event Reports

Use this procedure to generate an event report from selected event criteria. The event report contains critical information about the event such as the target CI that caused the event, error message, time of event, and so on. Event reports provide visibility into service-level activity across your network. Event Reports require user input and can be generated in several formats such as Excel and CSV.

To generate an Event Report:

1. Log in to OM Portal.  
The Dashboard page appears.
2. From the Reports menu, select **Event Reports**.  
The Event Reporting page appears.
3. On the Event Reporting page, decide whether you want to search events by Incident Ticket Number or Event Attributes.

4. If searching by ticket number, enter the number of the Incident Ticket for which you want to search for associated events.
5. If searching by attributes, enter the appropriate search criteria from the available fields; then click **SEARCH**.

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**Note:** The processing time for any search will vary depending on the size of the data file being searched. To decrease processing time, narrow the search by using multiple search fields.

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6. The Event Reports page displays all events that are associated with the search criteria you entered. The page displays the following fields for each event:
  - **Hostname**  
Identifies the target CI from where the event originated
  - **First/Last Occurrence**  
Indicates the time stamp of when the event first and last occurred
  - **Cleared**  
Indicates the time stamp of when the event was cleared
  - **Tally**  
Indicates the number of occurrences for the event.
  - **Severity**  
Indicates severity of event. Severity 0: Clear, Severity 1: Indeterminate, Severity 2: Warning, Severity 3: Minor, Severity 4: Major, Severity 5: Critical.
  - **Ticket ID**  
Identifies the unique ID assigned to each event ticketed as an Incident
  - **Summary**  
The summary text for the Event Log entry
7. You can click the + (plus) sign for additional details on the reported event.
8. Repeat the steps as required to generate another event report.

## Generate External Reports

Use this procedure to make local reports available to your users. The External Reports page provides a local URL instance of the report.

To create an external report:

1. Log in to OM Portal.  
The Dashboard page appears.
2. From the Reports menu, select **External Reports**.  
The External Report List page appears.
3. Click **Add External Report**.  
The Add External Report area appears on the page.

4. In the Title box, enter the title name of the external report.
5. In the URL box, enter the full URL of the report.
6. In the Description box, enter a brief description of the external report.
7. Click **SAVE**.

## View Query

Use this procedure to view a query. A query can consist of data items from the Incident, Change, CMS, and Monitoring service applications. You can execute a query from the View Query page for your company within a specific data and time range.

To view a query:

1. Log in to OM Portal.
2. From the Reports menu, select Reports.  
The Report List dashboard page appears.
3. From the Queries table, locate the query you want to view, then click the Query Name.  
The View Query - *Query\_Name* page appears.
4. On the View Query page, you can choose to run a query. Do the following:
  - a. In the Begin Time box, click the calendar icon, then select the begin date and time range. Click **Apply** to apply your selection.
  - b. In the End Time box, click the calendar icon, then select the end date and time range. Click **Apply** to apply your selection.
  - c. From the Can group fields list, select the fields that you want to group, then click **Add**.
  - d. From the Fields setting table, you can do the following:  
Select **Hide this field** if you want to omit a specific field from the report  
From the Subtotal function list, select the aggregation value to display as a subtotal within the report for the specific field, such as number of rows (COUNT ROW) or number of unique values within a column (COUNT UNIQUE VALUE.)
  - e. From the Render as list, select a format to display the report:

Display Format	Settings
Default	None
Table	None
Pie	<ol style="list-style-type: none"> <li>1. From the Target Column Name list, select the column name.</li> <li>2. In the Chart Height box, enter the required height for the chart.</li> <li>3. In the Chart Width box, enter the required width for the chart.</li> <li>4. Select <b>Show Legend</b> if you want to display the legend.</li> </ol>

Display Format	Settings
Area	<ol style="list-style-type: none"> <li>1. From the X Field Name list, select the field to set as the X-axis</li> <li>2. From the Y Field Name list, select the fields to set as the Y-axis.</li> <li>3. In the Chart Height box, enter the required height for the chart.</li> <li>4. In the Chart Width box, enter the required width for the chart.</li> <li>5. In the Max X-Axis Ticks Label Number box, enter the maximum number of ticks on the x-axis.</li> <li>6. Select <b>Opaque Chart</b> if you want an opaque chart.</li> <li>7. Select <b>Show Legend</b> if you want to display the legend.</li> <li>8. Select <b>Show Unified Metric of Y-Axis</b> to combine multiple Y-axis into one Y-axis.</li> <li>9. Select <b>Vertical X-Axis Labels</b> to display vertical x-axis labels.</li> </ol>
Time Series	<ol style="list-style-type: none"> <li>1. From the X Field Name list, select the field to set as the X-axis</li> <li>2. From the Y Field Name list, select the field to set as the Y-axis.</li> <li>3. In the Chart Height box, enter the required height for the chart.</li> <li>4. In the Chart Width box, enter the required width for the chart.</li> <li>5. From the Set Data's Time Granularity list, select the level of granularity.</li> <li>6. Select <b>Show Legend</b> if you want to display the legend.</li> <li>7. Select <b>Show Unified Metric of Y-Axis</b> to combine multiple Y-axis into one Y-axis.</li> <li>8. Select <b>Vertical X-Axis Labels</b> to display vertical x-axis labels.</li> </ol>
Line	<ol style="list-style-type: none"> <li>1. From the X Field Name list, select the field to set as the X-axis</li> <li>2. From the Y Field Name list, select the field to set as the Y-axis.</li> <li>3. In the Chart Height box, enter the required height for the chart.</li> <li>4. In the Chart Width box, enter the required width for the chart.</li> <li>5. In the Max X-Axis Ticks Label Number box, enter the maximum number of tick on the x-axis.</li> <li>6. Select <b>Show Legend</b> if you want to display the legend.</li> <li>7. Select <b>Show Unified Metric of Y-Axis</b> to combine multiple Y-axis into one Y-axis.</li> <li>8. Select <b>Vertical X-Axis Labels</b> to display vertical x-axis labels.</li> </ol>
Bar	<ol style="list-style-type: none"> <li>1. From the X Field Name list, select the field to set as the X-axis</li> <li>2. From the Y Field Name list, select the field to set as the Y-axis.</li> <li>3. In the Chart Height box, enter the required height for the chart.</li> <li>4. In the Chart Width box, enter the required width for the chart.</li> <li>5. In the Max X-Axis Ticks Label Number box, enter the maximum number of tick on the x-axis.</li> <li>6. Select <b>Opaque Chart</b> if you want an opaque chart.</li> <li>7. Select <b>Show Legend</b> if you want to display the legend.</li> <li>8. Select <b>Show Unified Metric of Y-Axis</b> to combine multiple Y-axis into one Y-axis.</li> <li>9. Select <b>Vertical X-Axis Labels</b> to display vertical x-axis labels.</li> </ol>

f. Click **EXECUTE QUERY**.



OM Portal generates the query for your company and date or time window you selected and displays the data in the Query Results area.

5. Click **Download CSV** to download all query results or you can choose to download only an individual result. You can export the results to any common spreadsheet program that supports comma-separated value (CSV) files.

## View Report

Use this procedure to view a report. A report can consist of query components from the Incident, Change, Configuration Management System (CMS), and Monitoring service applications. You can generate a report from the View Report page for your company within a specific data and time range.

To view a report:

1. Log in to OM Portal

The Dashboard page appears.

and select Reports from the top banner menu. The system displays the Report List dashboard page.

2. From the Reports menu, select **Reports**.

The Report List page appears.

3. Locate the report you wish to view, then click the Report Name.

The View Report page appears.

4. You can choose to generate a report within a particular date and time range. Do the following:

- a. In the Begin Time field, click the calendar icon; then select the begin date and time range. Click **Apply** to apply your selection to the Begin Time field.

- b. In the End Time field, click the calendar icon; then select the End date and time range. Click **Apply** to apply your selection to the End Time field.

- c. Click **EXECUTE REPORT**.

OM Portal generates the report for date/time window you selected and displays the data in the Report Results area.

5. Click **Download CSV** to download all report results or you can download only an individual result. You can export the results to any common spreadsheet program that supports comma-separated value (CSV) files.

## Create Subscription

When you create a subscription, you instruct OM Portal to e-mail, on a periodic basis, certain types of user reports to recipients defined in a subscriber list.

You configure scheduled reports by defining which type of report to send, the frequency with which the report is sent, and to whom the report is sent. You can schedule reports to be sent to one or more recipients.

To create a report subscription:

1. Log in to OM Portal.

The Dashboard page appears.

2. From the Reports menu, select **Create Subscription**.

The Create Subscription page appears.

3. In the Subscription Title box, enter a name for the report subscription, for example, "Jim's daily update of CMS inventory."
4. From the Report list, select the report you want to schedule to be delivered to a subscriber list.
5. From the Schedule Type list, select a schedule for the report. You can choose from any of the following options (you must choose at least one):
  - To send a report on a daily basis, select Daily report (you must select the time of day at which the report should be sent).
  - To send a report on a weekly basis, select Weekly (you must select the day of the week on which the report should be sent).
  - To send a report on a monthly basis, select Monthly (you must select the day of the month on which the report should be sent).
6. From the Deliver At list (filtered from your Schedule Type selection), select either the time of day, the day of the week, or the day of the month on which the report should be sent.
7. From the Time Zone list, select the time zone region associated with sending the report.
8. From the Date Format list, select the date format associated with sending the report.
9. From the Time Format list, select the time format associated with sending the report.
10. From the Email Format list, select the format in which to send the report.
11. From the Subscribers area, select the report recipients by selecting the appropriate subscriber e-mail list.
12. Click **SUBSCRIBE**

OM Portal creates the subscription and schedules the report to be delivered to the selected subscribers.

## Subscription Summary

Use this procedure to view a summary overview of all subscriptions belonging to your company. You can apply filters to display certain subscription information by subscriber list and report list.

From the Subscription Summary page, you can also choose to edit or delete a subscription.

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**Note:** When editing a subscription, you cannot change the report type.

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To view the Subscription summary:

1. Log in to OM Portal.  
The Dashboard page appears.
2. From the Reports menu, select **Subscription Summary**.

The Subscription Summary page with a list of subscriptions appears.

3. In the Filter section, from the Subscriber and Report list, select filter information as appropriate, then click **FILTER**.

The filter results appear in the Summary section.



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## Customer Training Videos

Oracle is pleased to announce recorded training sessions that will provide beneficial tips and information to help with specific situations you may encounter with Oracle Operations Management Platform.

To access a recording, simply select a URL below:

- Using the Dashboard

[https://jumpgate-itsp.sun.com/training/omp\\_customer\\_training/omp\\_customer\\_demo\\_dashboard\\_flash/omp\\_customer\\_demo\\_dashboard\\_flash.html](https://jumpgate-itsp.sun.com/training/omp_customer_training/omp_customer_demo_dashboard_flash/omp_customer_demo_dashboard_flash.html)

- Account Management

[https://jumpgate-itsp.sun.com/training/omp\\_customer\\_training/omp\\_customer\\_demo\\_account\\_flash/omp\\_customer\\_demo\\_account\\_flash.html](https://jumpgate-itsp.sun.com/training/omp_customer_training/omp_customer_demo_account_flash/omp_customer_demo_account_flash.html)

- User Invitations

[https://jumpgate-itsp.sun.com/training/omp\\_customer\\_training/omp\\_customer\\_demo\\_invite\\_flash/omp\\_customer\\_demo\\_invite\\_flash.html](https://jumpgate-itsp.sun.com/training/omp_customer_training/omp_customer_demo_invite_flash/omp_customer_demo_invite_flash.html)

- Configuration Management

[https://jumpgate-itsp.sun.com/training/omp\\_customer\\_training/omp\\_customer\\_demo\\_cms\\_flash/omp\\_customer\\_demo\\_cms\\_flash.html](https://jumpgate-itsp.sun.com/training/omp_customer_training/omp_customer_demo_cms_flash/omp_customer_demo_cms_flash.html)

- Incident Management

[https://jumpgate-itsp.sun.com/training/omp\\_customer\\_training/omp\\_customer\\_demo\\_incident\\_flash/omp\\_customer\\_demo\\_incident\\_flash.html](https://jumpgate-itsp.sun.com/training/omp_customer_training/omp_customer_demo_incident_flash/omp_customer_demo_incident_flash.html)

- Change Management

[https://jumpgate-itsp.sun.com/training/omp\\_customer\\_training/omp\\_customer\\_demo\\_change\\_flash/omp\\_customer\\_demo\\_change\\_flash.html](https://jumpgate-itsp.sun.com/training/omp_customer_training/omp_customer_demo_change_flash/omp_customer_demo_change_flash.html)

- Reporting

[https://jumpgate-itsp.sun.com/training/omp\\_customer\\_training/omp\\_customer\\_demo\\_reports\\_exadata\\_flash/omp\\_customer\\_demo\\_reports\\_exadata\\_flash.html](https://jumpgate-itsp.sun.com/training/omp_customer_training/omp_customer_demo_reports_exadata_flash/omp_customer_demo_reports_exadata_flash.html)

