

Oracle® Advanced Monitoring and Resolution

User's Guide,

Release 3.0.0.0 for all platforms

E24680-02

November 2011

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Oracle® Advanced Monitoring and Resolution User Guide, , Release 3.0.0.0 for all platforms

E24680-02

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Preface

This guide provides information about how to use the Advanced Monitoring capabilities in Oracle Advanced Monitoring and Resolution.

Audience

This guide is intended for customer users and customer user administrators using Oracle Advanced Monitoring and Resolution.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit

<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	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.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

This chapter introduces the main concepts in Oracle Advanced Monitoring and Resolution.

It includes the following topics:

- [About Oracle Advanced Monitoring and Resolution](#)
- [About Oracle Advanced Monitoring and Resolution Users](#)
- [About Certified and Supported Browsers](#)
- [Logging in to Oracle Advanced Monitoring and Resolution](#)
- [About the Oracle Advanced Monitoring and Resolution User Interface](#)

Note: The **Advanced Monitoring** tab in Oracle Advanced Monitoring and Resolution provides all the advanced monitoring capabilities of earlier Oracle® Mission Critical Support (MCSP) releases. Account management is now administered on the **Accounts** tab.

About Oracle Advanced Monitoring and Resolution

Oracle Advanced Monitoring and Resolution 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. Oracle Advanced Monitoring and Resolution 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.

Oracle Advanced Monitoring and Resolution 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).

Oracle Advanced Monitoring and Resolution capabilities include:

- 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

Oracle Advanced Monitoring and Resolution 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.

Related Topics

[About Oracle Advanced Monitoring and Resolution Users](#)

[About Certified and Supported Browsers](#)

[Logging in to Oracle Advanced Monitoring and Resolution](#)

[About the Oracle Advanced Monitoring and Resolution User Interface](#)

About Oracle Advanced Monitoring and Resolution Users

Oracle Advanced Monitoring and Resolution supports the following users:

- A **customer user** is an individual in the customer user organization who has been added to Oracle Advanced Monitoring and Resolution.
- A **customer user administrator (CUA)** is an optional additional assignment to a customer user, giving the ability to grant privileges to other Oracle Advanced Monitoring and Resolution users in their customer organization.
- A **service provider user** is an Oracle user. Service provider users who have been granted access to an organization or any of the organization resources, such as groups, contracts, or contract line items, can view or manage those resources according to the level of access. For example, service provider users who have been granted access to at least one contract line item for the customer organization can view or manage that contract line item. Service providers can invite one or more customer users to become the CUA for the customer organization.

Note: The terms *service provider* and *provider user* are also used to denote a *service provider user*.

About Customer Users

A **customer user** is a member with of a customer organization with basic access privileges to Oracle Advanced Monitoring and Resolution. Once the individual's details have been added to the Oracle Advanced Monitoring and Resolution Address Book as a customer user for their organization, they will receive e-mail notification. The account is activated when they log in to Oracle Advanced Monitoring and Resolution.

Each customer user can use Oracle Advanced Monitoring and Resolution to perform the following tasks:

- View contracts for their organizations

- View their group membership
- View their assignments
- View the Address Book for their customer organization
- View and update their Oracle Advanced Monitoring and Resolution profile information

About Customer User Administrators

A **customer user administrator (CUA)** is an optional additional privilege that can be granted to a customer user. Each organization can have one or more CUAs. CUAs can add individuals in their organization to the Oracle Advanced Monitoring and Resolution address book, thereby creating users accounts for those individuals. They grant access privileges to their customer users through a combination of groups, roles, and policies.

In summary, each CUA can use Oracle Advanced Monitoring and Resolution to:

- View contracts for their customer organization
- Manage users and contacts in the Address Book for their customer organization
- Manage groups of users
- View roles and privileges
- Manage policies to grant those users access to contracts, service delivery plans (SDPs), and other resources
- View and update their Oracle Advanced Monitoring and Resolution profile information

About Service Provider Users

A **service provider user** is an Oracle employee who can access Oracle Advanced Monitoring and Resolution. Service provider users can be granted access to view and manage customer organizations. When requested, service provider users can perform the following tasks on behalf of customer organizations.

- Manage contracts for customer organizations
- Invite customer users to become customer user administrators (CUAs) for their organization
- Add, update, or delete customer organizations
- Manage roles and view privileges
- View users and contacts for certain customer organizations

Related Topics

[About Oracle Advanced Monitoring and Resolution](#)

[About Certified and Supported Browsers](#)

[Logging in to Oracle Advanced Monitoring and Resolution](#)

[About the Oracle Advanced Monitoring and Resolution User Interface](#)

About Certified and Supported Browsers

This section describes the Web browsers that you can use to access Oracle Advanced Monitoring and Resolution, including:

- **Certified Web browsers**, which are fully tested and supported by Oracle.
- **Supported Web browsers**, which are supported by Oracle.

The following Web browsers can be used with Oracle Advanced Monitoring and Resolution:

Web Browser	Versions	Support Type
Mozilla Firefox	3.6 & later, 4.0	Certified
Microsoft Internet Explorer	7, 8, & 9	Certified
Mozilla Firefox	3.5 & later, 5.0, 6.0	Supported
Google Chrome	13.0 & later	Supported

Related Topics

[About Oracle Advanced Monitoring and Resolution](#)

[About Oracle Advanced Monitoring and Resolution Users](#)

[Logging in to Oracle Advanced Monitoring and Resolution](#)

[About the Oracle Advanced Monitoring and Resolution User Interface](#)

Logging in to Oracle Advanced Monitoring and Resolution

Once you have received e-mail notification that your user account has been enabled, log in to the Oracle Advanced Monitoring and Resolution home page.

Note: If you cannot log in to Oracle Advanced Monitoring and Resolution or have not received e-mail notification, contact your ITSM.

To log in to Oracle Advanced Monitoring and Resolution:

1. Open the following Web page:

`https://amr.oracle.com`

The Oracle Advanced Monitoring and Resolution login page appears, displaying your user profile.

2. Modify the following fields as required:

Area	Field	Description
Username	Title	One of the following values: <ul style="list-style-type: none"> Miss Mr Mrs Ms
	User Type	One of the following values: <ul style="list-style-type: none"> Provider - for service provider users Customer - for customer users and customer user administrators
	First Name ¹	Your first name
	Last Name ¹	Your last name
	Home Page	URL for your home page
	Preferences	Language ¹
Time Zone ¹		Time zone in which you work
Date Format ¹		Format to be used when displaying dates
Time Format ¹		Format to be used when displaying time
Contact Information	E-mail Address ¹	Your e-mail address
	Notification	Check this check box to receive notifications from Oracle Advanced Monitoring and Resolution to this e-mail address
	Phone Numbers	Phone number corresponding to the e-mail address entered
	Type	Type of phone number, having one of the following values: <ul style="list-style-type: none"> Home Mobile/Cell Office

¹ Mandatory field

3. Add addresses as follows:

Note: You must add an office address.

a. Click Add.

The Add New Address window appears.

b. Enter the following information then click OK:

Field	Description
Type	One of the following values: <ul style="list-style-type: none"> - Billing - Home - Office - Other - Shipping
Address Line 1	First line of the address, in free text

Field	Description
Address Line 2	Second line of the address, in free text
Address Line 3	Third line of the address, in free text
Postal Code	Post code for the address, if any
City	Name of the city
State or province	Name of the state or province
Country	Select the country from the list

The Profile page reappears, showing the new address in the Addresses pane.

The Profile page reappears, showing the new address in the Addresses pane.

4. Click **Save.**

A hyperlinked message appears, confirming that the login has been successful.

5. Click the hyperlinked success message.

The Oracle Advanced Monitoring and Resolution home page appears.

6. Click **Advanced Monitoring.**

The Advanced Monitoring page appears.

Note: If you cannot see the **Advanced Monitoring** tab when you log in to Oracle Advanced Monitoring and Resolution, contact your ITSM.

Related Topics

[About Oracle Advanced Monitoring and Resolution](#)

[About Oracle Advanced Monitoring and Resolution Users](#)

[About Certified and Supported Browsers](#)

[Logging in to Oracle Advanced Monitoring and Resolution](#)

About the Oracle Advanced Monitoring and Resolution User Interface

As the Oracle Advanced Monitoring and Resolution Customer User Administrator (CUA), you manage all Oracle Advanced Monitoring and Resolution users and contacts for your organization(s). Oracle Advanced Monitoring and Resolution provides the following capabilities:

Accounts Tab

The **Accounts** tab provides account management capabilities for the selected organization. The Contracts page displays a searchable list of the organization’s contracts with Oracle. The Address Book page provides the ability to maintain contact information for the organization’s Oracle Advanced Monitoring and Resolution users and groups. Access to Oracle Advanced Monitoring and Resolution tabs and resources is governed by a framework of policies and assignments, which can be managed on the Policies and Assignments page. Policies and assignments can be applied to individuals and to groups, which can be defined on the Groups page. Finally, the User Profile page defines personal contact information and preferences for the user.

Advanced Monitoring Tab

The **Advanced Monitoring** tab contains all of the capabilities previously available in Mission Critical Support Platform (MCSP) and Operations Management Platform (OMP), except account management. Account management is available on the **Accounts** tab, described earlier.

Related Topics

[About Oracle Advanced Monitoring and Resolution](#)

[About Oracle Advanced Monitoring and Resolution Users](#)

[About Certified and Supported Browsers](#)

[Logging in to Oracle Advanced Monitoring and Resolution](#)

Using Account Management

This chapter describes how to manage accounts for customer users and customer user administrators (CUAs) in Oracle Advanced Monitoring and Resolution.

Related Topics

[Account Management for Customer Users](#)

[Account Management for Customer User Administrators \(CUAs\)](#)

Account Management for Customer Users

The **Accounts** tab provides account management through links to a number of different pages. The Address Book page displays all your organization contacts and users in Oracle Advanced Monitoring and Resolution. The Groups page displays groups of which you are a member. Oracle Advanced Monitoring and Resolution provides the ability to group these users and contacts according to common criteria, such as geographic location.

All Oracle Advanced Monitoring and Resolution users are assigned roles to enable them to perform different tasks or associated them with a particular Oracle contract. The Policies and Assignments page displays all the policies and assignments, which determine your access to Oracle Advanced Monitoring and Resolution applications. You can also view all contracts for your organization on the Contracts page.

Finally, the **Accounts** tab provides the ability to manage your Oracle Advanced Monitoring and Resolution user profile by editing your contact information and preferences.

Related Topics

[Viewing Contracts](#)

[Viewing Users and Contacts](#)

[Viewing Groups](#)

[Viewing Policies and Assignments](#)

[Customizing Your User Profile](#)

[Account Management for Customer User Administrators \(CUAs\)](#)

Viewing Contracts

The Contracts page shows all of the contracts between Oracle and your organization, as defined in Oracle's contract database, OKS. An Oracle service provider user maintains this contract list.

Prerequisites

- You have been granted access to the contract through an Oracle Advanced Monitoring and Resolution policy.

To view contract details:

1. Log in to Oracle Advanced Monitoring and Resolution.
The Oracle Advanced Monitoring and Resolution Home page appears.
2. Click the **Accounts** tab, then select your organization name from the Organization list in the top right corner of the View Accounts page.
The View Accounts page reappears, displaying all services for the selected organization.
3. Click **Contracts** in the left pane.
The View Contracts page opens, displaying the following information about all contracts for the selected organization:

Field	Description
Name	Name of the contract
OksRef	Identifier for this contract in the Oracle contracts database, OKS.
OksModifier	Supplementary identifier for this contract in the Oracle contracts database, OKS.
StartDate	Contract start date, in the format DD-MMM-YYYY where DD is the day, MMM is the month, and YYYY is the year.
EndDate	Contract end date, in the format DD-MMM-YYYY where DD is the day, MMM is the month, and YYYY is the year.
Status	Status of the contract, which can be: <ul style="list-style-type: none"> - Cancelled, where the contract has been cancelled. - Completed, where the contract has been completed. (You can use this status to identify a contract that has been completed before its end date.) - Firm, where the customer has signed the contract. - Prospects, where the contract is not guaranteed to proceed, and no work has commenced on it - WAR (Work at Risk), where the contract is expected to proceed: work has already commenced, but it has not yet been signed by the customer

Click **View** to view a list of the columns displayed on the View Users page. Visible columns are indicated by a checkmark.

To hide a column, select the column in this list, which removes the checkmark. You can also click **Show All** to show all columns.

To reorder this list, click **Reorder columns**, then use the arrows to alter the display. Click **Save** to save the changes.

Related Topics

[Viewing Contracts](#)

[Viewing Users and Contacts](#)

[Viewing Groups](#)

[Viewing Policies and Assignments](#)

[Customizing Your User Profile](#)

[Account Management for Customer User Administrators \(CUAs\)](#)

Viewing Users and Contacts

The Address Book provides the ability to view all your organization's Oracle Advanced Monitoring and Resolution users and contacts on one page, where:

- A **user** has an account in Oracle Advanced Monitoring and Resolution, enabling them to access Oracle Advanced Monitoring and Resolution.
- A **contact** is an individual who is involved with Oracle services and packages whose details have been registered in Oracle Advanced Monitoring and Resolution. Contacts may or may not have access to Oracle Advanced Monitoring and Resolution.

On the Address Book page, you can customize the fields display or filter the users displayed by entering filter criteria. You can also search for users using the Search field. The Search field autocompletes search criteria entered, returning the first user in the displayed list that matches the criterion.

Prerequisites

- None.

To view contacts and users:

1. Log in to Oracle Advanced Monitoring and Resolution.

The Oracle Advanced Monitoring and Resolution Home page appears.

2. Click the **Accounts** tab, then select your organization name from the Organization list in the top right corner of the View Accounts page.

The View Accounts page reappears, displaying all services for the selected organization.

3. Click **Address Book** in the left pane.

The View Contacts page appears, displaying the following information for all contacts for the selected organization:

Field	Description
E-mail	Displays the contact's e-mail address.
Type	Indicates whether the contact is: <ul style="list-style-type: none"> ■ Management ■ Technical
User Status	Indicates whether the user status is: <ul style="list-style-type: none"> ■ Enabled, where a new Oracle Advanced Monitoring and Resolution user account has been added and activated. Users with this user status can log in to Oracle Advanced Monitoring and Resolution. ■ Migrated, where an existing account has been migrated to Oracle Advanced Monitoring and Resolution and activated. Users with this user status can log in to Oracle Advanced Monitoring and Resolution. ■ Pending, where a new Oracle Advanced Monitoring and Resolution account has been added but the user has not yet activated the account by logging in, or where an existing account has been added to Oracle Advanced Monitoring and Resolution but again the user has not yet activated the account. ■ Disabled, where an Oracle Advanced Monitoring and Resolution user account has been deactivated. Users with this user status cannot log in to Oracle Advanced Monitoring and Resolution. ■ Deleted, where an Oracle Advanced Monitoring and Resolution user account has been deleted. Users with this user status cannot log in to Oracle Advanced Monitoring and Resolution.

Field	Description
First Name	Displays the contact's first name, as registered in the Oracle Advanced Monitoring and Resolution address book
Last Name	Displays the contact's last name, as registered in the Oracle Advanced Monitoring and Resolution address book

4. You can perform the following actions on the View Contacts page:

Note: Most frequently used operations are displayed under Address Book in the left pane. All the options listed here are available on the menu bar of the View Contacts page.

- **Filter displayed contacts** - Click any column name to sort the contacts displayed by that column. For example, click **Name** to sort alphabetically by name.
Click the same column again to reverse the sort order. Clicking the **Name** column again sorts in reverse alphabetical order.
- **Search contacts** - In the **Search** field on the menu bar, enter the contact's e-mail address, or first or last name. Oracle Advanced Monitoring and Resolution automatically completes the string you enter with the first contact that matches. You can also use the wildcard %. Then click the **Search** icon. The View Contacts page is refreshed, displaying the contact(s) matching the full or partial entry.
- **Customize the contact page** - Click **View** to view a list of the columns displayed on the View Contacts page. Visible columns are indicated by a checkmark.
To hide a column, select the column in this list, which removes the checkmark. You can also click **Show All** to show all columns.
To reorder this list, click **Reorder columns**, then use the arrows to alter the display. Click **Save** to save the changes.

Related Topics

[Viewing Contracts](#)

[Viewing Users and Contacts](#)

[Viewing Groups](#)

[Viewing Policies and Assignments](#)

[Customizing Your User Profile](#)

[Account Management for Customer User Administrators \(CUAs\)](#)

Viewing Groups

Oracle Advanced Monitoring and Resolution provides the ability to group users in your organization according common criteria, such as geographical location. The **Accounts** tab displays your group memberships.

Prerequisites

- None.

To view groups:

1. Log in to Oracle Advanced Monitoring and Resolution.

The Oracle Advanced Monitoring and Resolution Home page appears.

2. Click the **Accounts** tab, then select your organization name from the Organization list in the top right corner of the View Accounts page.

The View Accounts page reappears, displaying all contacts for the selected organization.

3. Click **Users and Groups** in the left pane. Then click **View Groups**.

The View Groups page appears, displaying the following information for each of the groups listed:

Field	Description
Name	Displays the group name
Description	Displays a brief description of the group

4. You can perform the following actions on the View Groups page:

Note: Most frequently used operations are displayed under Users and Groups in the left pane. All the options listed here are available on the menu bar of the View Groups page.

- **Filter displayed groups** - Click any column name to sort the groups displayed by that column. For example, click **Name** to sort alphabetically by name.

Click the same column again to reverse the sort order. Clicking the **Name** column again sorts in reverse alphabetical order.

- **Customize the group page** - Click **View** to view a list of the columns displayed on the View Groups page. Visible columns are indicated by a checkmark.

To hide a column, select the column in this list, which removes the checkmark. You can also click **Show All** to show all columns.

To reorder this list, click **Reorder columns**, then use the arrows to alter the display. Click **Save** to save the changes.

Related Topics

[Viewing Contracts](#)

[Viewing Users and Contacts](#)

[Viewing Groups](#)

[Viewing Policies and Assignments](#)

[Customizing Your User Profile](#)

[Account Management for Customer User Administrators \(CUAs\)](#)

Viewing Policies and Assignments

Oracle Advanced Monitoring and Resolution uses policies and assignments to associate a user or group with multiple roles and resources. The **Policies and Assignments** tab displays all policies and assignments for your organization.

Related Topics

[Viewing Assignments](#)

[Viewing a Policy](#)

Viewing Assignments

Existing assignments are listed on the Policies and Assignments page.

Prerequisites

- You are the Oracle Advanced Monitoring and Resolution Customer User Administrator for your organization.
- Your Oracle Service Provider has created the requisite roles for your organization.

To view assignments:

1. Log in to Oracle Advanced Monitoring and Resolution.
The Oracle Advanced Monitoring and Resolution Home page appears.
2. Click the **Accounts** tab, then select your organization name from the Organization list in the top right corner of the View Accounts page.
The View Accounts page reappears.
3. Click **Policies and Assignments** in the left pane.
The Policies and Assignments page appears, displaying details of policies and assignments in the lower pane.
4. Click **Assignments**.
The Assignments tab appears.
5. Enter the name of the assignment, then click **Search**.
The Policies and Assignments page reappears, showing details of the assignment in the lower pane under the Assignments tab.

Related Topics

[Viewing Policies and Assignments](#)

[Viewing Assignments](#)

[Viewing a Policy](#)

Viewing a Policy

Existing policies are listed on the Policies and Assignments page. You can view details of a policy to find out the individual users or groups covered and the roles and resources assigned to them under the policy. You can also add new policies for any of your existing users, groups, roles, and resources.

Prerequisites

- You are the Oracle Advanced Monitoring and Resolution Customer User Administrator for your organization.
- The requisite roles exist for your organization, created by you or your Oracle service provider.

To view a policy:

1. Log in to Oracle Advanced Monitoring and Resolution.

The Oracle Advanced Monitoring and Resolution Home page appears.

2. From the Organization list in the top right corner, select the organization you want to manage.

The Oracle Advanced Monitoring and Resolution Home page reappears displaying information for the selected organization.

3. Click the **Accounts** tab, then click **Policies and Assignments** in the left pane, then click **View Policies**.

The Policies page appears, displaying the following information about all the role assignments for the selected organization:

You can perform the following actions on this page:

- **Search policies** - Enter any combination of the criteria listed earlier, then click **Search**.

The Policies and Assignments page is refreshed, displaying all policies meeting these criteria.

- **Customize the Policies and Assignments page** - Click **View** to view a list of the columns displayed on the Policies and Assignments page. Visible columns are indicated by a checkmark.

To hide a column, select the column in this list, which removes the checkmark. You can also click **Show All** to show all columns.

To reorder this list, click **Reorder columns**, then use the arrows to alter the display. Click **Save** to save the changes.

Related Topics

[Viewing Policies and Assignments](#)

[Viewing Assignments](#)

[Viewing a Policy](#)

Customizing Your User Profile

Oracle Advanced Monitoring and Resolution provides the ability to update your user profile, including contact information and preferences.

Prerequisites

- You are the Oracle Advanced Monitoring and Resolution Customer User Administrator for your organization.

To customize your user profile:

1. Log in to Oracle Advanced Monitoring and Resolution.

The Oracle Advanced Monitoring and Resolution Home page appears.

2. Click the **Accounts** tab, then select your organization name from the Organization list in the top right corner of the View Accounts page.

The View Accounts page reappears, displaying all contacts for the selected organization.

3. Click **Users and Groups** in the left pane. Then click **User Profile**.

The User Profile page appears.

4. Modify the following fields as required, then click **Save**.

Area	Field	Description
Username	Title	One of the following values: <ul style="list-style-type: none"> ▪ Miss ▪ Mr ▪ Mrs ▪ Ms
	User Type	
	First Name	Your first name
	Last Name	Your last name
	Home Page	URL for your home page
Preferences	Language	Your preferred display language
	Time Zone	Time zone in which you work
	Date Format	Format to be used when displaying dates
	Time Format	Format to be used when displaying time
Contact Information	E-mail Address	Your e-mail address
	Notification	Check this check box to receive notifications from MCSP to this e-mail address
	Phone Numbers	Phone number corresponding to the e-mail address entered Type of phone number, having one of the following values: <ul style="list-style-type: none"> ▪ Home ▪ Mobile/Cell ▪ Office
Addresses	Add Address	Add postal addresses as required.

The updated User Profile appears, displaying the new information.

Related Topics

[Viewing Contracts](#)

[Viewing Users and Contacts](#)

[Viewing Groups](#)

[Viewing Policies and Assignments](#)

[Customizing Your User Profile](#)

[Account Management for Customer User Administrators \(CUAs\)](#)

Account Management for Customer User Administrators (CUAs)

The **Accounts** tab provides the ability to manage all contacts and users for your organization(s), through links to a number of different pages. The Address Book page displays all your organization contacts and users in Oracle Advanced Monitoring and Resolution. Here, you can add, update, or delete contact and user records. The Groups page provides the ability to group these users and contacts according to common criteria, such as geographic location.

All Oracle Advanced Monitoring and Resolution users are assigned roles to enable them to perform different tasks or associated them with a particular Oracle contract. The Policies and Assignments page displays all the policies and assignments, which determine your access and your customer users' access to Oracle Advanced Monitoring and Resolution applications. You can also view all contracts for your organization on the Contracts page.

Finally, the **Accounts** tab provides the ability to manage your Oracle Advanced Monitoring and Resolution user profile by editing your contact information and preferences.

Related Topics

[Viewing Contracts](#)

[Managing Users and Contacts](#)

[Managing Groups](#)

[Managing Policies and Assignments](#)

[Customizing Your User Profile](#)

[Account Management for Customer Users](#)

Viewing Contracts

The Contracts page shows all of the contracts between Oracle and your organization, as defined in Oracle's contract database, OKS. An Oracle service provider user maintains this contract list.

Prerequisites

- You have been granted access to the contract through an Oracle Advanced Monitoring and Resolution policy.

To view contract details:

1. Log in to Oracle Advanced Monitoring and Resolution.

The Oracle Advanced Monitoring and Resolution Home page appears.

2. Click the **Accounts** tab, then select your organization name from the Organization list in the top right corner of the View Accounts page.

The View Accounts page reappears, displaying all services for the selected organization.

3. Click **Contracts** in the left pane.

The View Contracts page opens, displaying the following information about all contracts for the selected organization:

Field	Description
Name	Name of the contract
OksRef	Identifier for this contract in the Oracle contracts database, OKS.
OksModifier	Supplementary identifier for this contract in the Oracle contracts database, OKS.
StartDate	Contract start date, in the format DD-MMM-YYYY where DD is the day, MMM is the month, and YYYY is the year.
EndDate	Contract end date, in the format DD-MMM-YYYY where DD is the day, MMM is the month, and YYYY is the year.
Status	Status of the contract, which can be: <ul style="list-style-type: none"> - Cancelled, where the contract has been cancelled. - Completed, where the contract has been completed. (You can use this status to identify a contract that has been completed before its end date.) - Firm, where the customer has signed the contract. - Prospects, where the contract is not guaranteed to proceed, and no work has commenced on it - WAR (Work at Risk), where the contract is expected to proceed: work has already commenced, but it has not yet been signed by the customer

Click **View** to view a list of the columns displayed on the View Users page. Visible columns are indicated by a checkmark.

To hide a column, select the column in this list, which removes the checkmark. You can also click **Show All** to show all columns.

To reorder this list, click **Reorder columns**, then use the arrows to alter the display. Click **Save** to save the changes.

Related Topics

[Viewing Contracts](#)

[Managing Users and Contacts](#)

[Managing Groups](#)

[Managing Policies and Assignments](#)

[Customizing Your User Profile](#)

[Account Management for Customer Users](#)

Managing Users and Contacts

The Address Book provides the ability to manage all your organization's Oracle Advanced Monitoring and Resolution contacts on one page:

- A **user** has an account in Oracle Advanced Monitoring and Resolution, enabling them to access Oracle Advanced Monitoring and Resolution.
- A **contact** is an individual who is involved with Oracle services and packages whose details have been registered in Oracle Advanced Monitoring and Resolution. Contacts may or may not have access to Oracle Advanced Monitoring and Resolution.

On the Address Book page, you can update a contact's details or create new Oracle Advanced Monitoring and Resolution contacts. You can customize the fields display or filter the users displayed by entering filter criteria. You can also search for users using the Search field. The Search field autocompletes search criteria entered, returning the first user in the displayed list that matches the criterion.

Prerequisites

- The individual is not already a contact for this organization in Oracle Advanced Monitoring and Resolution.

To manage contacts and users:

1. Log in to Oracle Advanced Monitoring and Resolution.

The Oracle Advanced Monitoring and Resolution Home page appears.

2. Click the **Accounts** tab, then select your organization name from the Organization list in the top right corner of the View Accounts page.

The View Accounts page reappears, displaying all services for the selected organization.

3. Click **Address Book** in the left pane.

The View Contacts page appears, displaying the following information for all contacts for the selected organization:

Field	Description
E-mail	Displays the contact's e-mail address.
Type	Indicates whether the contact is: <ul style="list-style-type: none"> ■ Management ■ Technical
User Status	Indicates whether the user status is: <ul style="list-style-type: none"> ■ Enabled, where a new Oracle Advanced Monitoring and Resolution user account has been added and activated. Users with this user status can log in to Oracle Advanced Monitoring and Resolution. ■ Migrated, where an existing account has been migrated to Oracle Advanced Monitoring and Resolution and activated. Users with this user status can log in to Oracle Advanced Monitoring and Resolution. ■ Pending, where a new Oracle Advanced Monitoring and Resolution account has been added but the user has not yet activated the account by logging in, or where an existing account has been added to Oracle Advanced Monitoring and Resolution but again the user has not yet activated the account. ■ Disabled, where an Oracle Advanced Monitoring and Resolution user account has been deactivated. Users with this user status cannot log in to Oracle Advanced Monitoring and Resolution. ■ Deleted, where an Oracle Advanced Monitoring and Resolution user account has been deleted. Users with this user status cannot log in to Oracle Advanced Monitoring and Resolution.
First Name	Displays the contact's first name, as registered in the Oracle Advanced Monitoring and Resolution address book
Last Name	Displays the contact's last name, as registered in the Oracle Advanced Monitoring and Resolution address book

4. You can perform the following actions on the View Contacts page:

Note: Most frequently used operations are displayed under Address Book in the left pane. All the options listed here are available on the menu bar of the View Contacts page.

- **Update a contact** - Select the contact, then click **Update** to open the Update Contact page. Edit the required fields (described in step 2), then click **Save**. The View Contacts page reappears, showing the updated details.

- **Add a contact** - To add a contact:
 - a. Click **Add**. The Add Contact page appears.
 - b. Enter the contact's e-mail address(es) in the E-mail Addresses field.
 - c. Select **Management** or **Technical** from the Contact Type list.
 - d. If required, select **Yes** for the Is the contact a user? field - this ensures that the contact has an Oracle Advanced Monitoring and Resolution user account.
 - e. Click **Save**.

The View Contacts page reappears, displaying the new contact details with user status Pending. When the request is successful, the user status changes to Active. An Oracle Advanced Monitoring and Resolution notification is sent to the e-mail address(es) of users, informing the recipient(s) that they have an Oracle Advanced Monitoring and Resolution account.

- **Filter displayed contacts** - Click any column name to sort the contacts displayed by that column. For example, click **Name** to sort alphabetically by name.

Click the same column again to reverse the sort order. Clicking the **Name** column again sorts in reverse alphabetical order.

- **Search contacts** - In the **Search** field on the menu bar, enter the contact's e-mail address, or first or last name. Oracle Advanced Monitoring and Resolution automatically completes the string you enter with the first contact that matches. You can also use the wildcard %. Then click the **Search** icon. The View Contacts page is refreshed, displaying the contact(s) matching the full or partial entry.
- **Delete a contact** - Select the contact then click **Delete**. When prompted, click **OK** confirm that you want to delete the contact. The View Contacts page reappears without the deleted contact details.
- **Customize the contact page** - Click **View** to view a list of the columns displayed on the View Contacts page. Visible columns are indicated by a checkmark.

To hide a column, select the column in this list, which removes the checkmark. You can also click **Show All** to show all columns.

To reorder this list, click **Reorder columns**, then use the arrows to alter the display. Click **Save** to save the changes.

Related Topics

[Viewing Contracts](#)

[Managing Users and Contacts](#)

[Managing Groups](#)

[Managing Policies and Assignments](#)

[Customizing Your User Profile](#)

[Account Management for Customer Users](#)

Managing Groups

You can add Oracle Advanced Monitoring and Resolution users in your organization into groups. This can be useful if you want to group contacts or users according to common criteria, such as geographical location.

Prerequisites

- None.

To manage groups:

1. Log in to Oracle Advanced Monitoring and Resolution.

The Oracle Advanced Monitoring and Resolution Home page appears.

2. Click the **Accounts** tab, then select your organization name from the Organization list in the top right corner of the View Accounts page.

The View Accounts page reappears, displaying all contacts for the selected organization.

3. Click **Users and Groups** in the left pane. Then click **View Groups**.

The View Groups page appears, displaying the following information for each of the groups listed:

Field	Description
Name	Displays the group name
Description	Displays a brief description of the group

4. You can perform the following actions on the View Groups page:

Note: Most frequently used operations are displayed under **Users and Groups** in the left pane. All the options listed here are available on the menu bar of the View Groups page.

- **Update a group** - Select the group, then click **Update** to open the Update Group page. Edit the required fields (described in step 2), then click **Save**. The View Groups page reappears, showing the updated details.
- **Add a new group** - To add a new group:
 - a. Click **Add**. The Add Group page appears.
 - b. Enter the new group names.
 - c. In the Group Members pane, click **Add**. The Available Users page appears.
 - d. Check the names of the users to be added to this group then click **OK**. The Add Group page reappears.
 - e. Click **Save**. The View Groups page reappears, displaying the new group name.

The View Groups page reappears, displaying the new group details.

- **Filter displayed groups** - Click any column name to sort the groups displayed by that column. For example, click **Name** to sort alphabetically by name. Click the same column again to reverse the sort order. Clicking the **Name** column again sorts in reverse alphabetical order.

- **Delete a group** - Select the group then click **Delete**. When prompted, click **OK** confirm that you want to delete the group. The View Groups page reappears without the deleted group details.
- **Customize the group page** - Click **View** to view a list of the columns displayed on the View Groups page. Visible columns are indicated by a checkmark.

To hide a column, select the column in this list, which removes the checkmark. You can also click **Show All** to show all columns.

To reorder this list, click **Reorder columns**, then use the arrows to alter the display. Click **Save** to save the changes.

Related Topics

[Viewing Contracts](#)

[Managing Users and Contacts](#)

[Managing Groups](#)

[Managing Policies and Assignments](#)

[Customizing Your User Profile](#)

[Account Management for Customer Users](#)

Managing Policies and Assignments

The **Policies and Assignments** tab provides the ability to create policies and assignments for your organization.

A policy associates a user or group with multiple roles and resources. For example, a policy may grant a group access to the Services tab, where they can see details of the service delivery plans for their organization. You can view existing policies and create new policies associating your users and groups with specific roles and resources.

Related Topics

[Viewing Assignments](#)

[Managing Policies](#)

[Adding a Policy](#)

[Account Management for Customer User Administrators \(CUAs\)](#)

Viewing Assignments

Existing assignments are listed on the Policies and Assignments page.

Prerequisites

- You are the Oracle Advanced Monitoring and Resolution Customer User Administrator for your organization.
- Your Oracle Service Provider has created the requisite roles for your organization.

To view assignments:

1. Log in to Oracle Advanced Monitoring and Resolution.

The Oracle Advanced Monitoring and Resolution Home page appears.

2. Click the **Accounts** tab, then select your organization name from the Organization list in the top right corner of the View Accounts page.

The View Accounts page reappears.

3. Click **Policies and Assignments** in the left pane.

The Policies and Assignments page appears, displaying details of policies and assignments in the lower pane.

4. Click **Assignments**.

The Assignments tab appears.

5. Enter the name of the assignment, then click **Search**.

The Policies and Assignments page reappears, showing details of the assignment in the lower pane under the Assignments tab.

Related Topics

[Managing Policies and Assignments](#)

[Viewing Assignments](#)

[Managing Policies](#)

[Adding a Policy](#)

[Account Management for Customer Users](#)

Managing Policies

Existing policies are listed on the Policies and Assignments page. You can view details of a policy to find out the individual users or groups covered and the roles and resources assigned to them under the policy. You can also add new policies for any of your existing users, groups, roles, and resources.

Prerequisites

- You are the Oracle Advanced Monitoring and Resolution Customer User Administrator for your organization.
- The requisite roles exist for your organization, created by you or your Oracle service provider.

To manage policies:

1. Log in to Oracle Advanced Monitoring and Resolution.

The Oracle Advanced Monitoring and Resolution Home page appears.

2. From the Organization list in the top right corner, select the organization you want to manage.

The Oracle Advanced Monitoring and Resolution Home page reappears displaying information for the selected organization.

3. Click the **Accounts** tab, then click **Policies and Assignments** in the left pane, then click **View Policies**.

The Policies page appears, displaying the following information about all the role assignments for the selected organization:

You can perform the following actions on this page:

- **Add a policy** - see [Adding a Policy](#).

- **Search policies** - Enter any combination of the criteria listed earlier, then click **Search**.

The Policies and Assignments page is refreshed, displaying all policies meeting these criteria.

- **Delete a policy** - Select a policy, then click **Delete**. When prompted, click **OK** confirm that you want to delete the policy. The Policy and Assignments page reappears without the deleted assignment role.
- **Customize the Policies and Assignments page** - Click **View** to view a list of the columns displayed on the Policies and Assignments page. Visible columns are indicated by a checkmark.

To hide a column, select the column in this list, which removes the checkmark. You can also click **Show All** to show all columns.

To reorder this list, click **Reorder columns**, then use the arrows to alter the display. Click **Save** to save the changes.

Related Topics

[Managing Policies and Assignments](#)

[Viewing Assignments](#)

[Managing Policies](#)

[Adding a Policy](#)

[Account Management for Customer Users](#)

Adding a Policy

Oracle Advanced Monitoring and Resolution also provides the ability to add a policy, which associates your users or groups with role(s) and resource(s), thereby authorizing them to access those resources. If you add a role, you will then need to add a policy to associate your users or groups with that policy. This section describes how to add a policy.

Prerequisites

- You are the Oracle Advanced Monitoring and Resolution Customer User Administrator for your organization.
- The requisite roles exist for your organization, created by you or your Oracle service provider.

To add a policy:

1. Log in to Oracle Advanced Monitoring and Resolution.
The Oracle Advanced Monitoring and Resolution Home page appears.
2. Click the **Accounts** tab, then click **Policies and Assignments**.
The Policies page appears.
3. Click **Add**.
The Policies and Assignments page reappears, displaying a new line.
4. Add individual users as follows:
 - a. Click **Add** in the Individual Users pane.
A new line appears in the pane, showing username and type columns.

- b. Click **Search** beside the username field.

The Search and Select: Username page appears.

- c. Enter the following criteria as required, then click **Search**:

Field	Description
Match	Check one of the following values: <ul style="list-style-type: none"> ▪ All - returns policies matching all of the criteria selected. ▪ Any - returns policies matching any one of the criteria selected.
Username	Enter the user name
First Name	Enter the user's first name
Last Name	Enter the user's last name

The Search and Select: Username page reappears, displaying all usernames meeting the selected criteria.

- d. Select the username of the user you want to add to the policy, then click **OK**.

The Policies and Assignments page reappears, displaying the username and type in the Individual Users pane.

- e. Add more individual users as required.

5. Add groups as follows:

- a. Click **Add** in the Groups pane.

A new line appears in the pane, showing username and type columns.

- b. From the groups list, select the name of the group you want to add to the policy.

The Groups pane displays the selected group.

- c. Optionally add more groups as required.

- d. Click **Save**.

The Search and Select: Username page appears.

6. Add roles as follows:

- a. Click **Add** in the Roles pane.

A new line appears in the pane, showing role name and role description columns.

- b. From the roles list, select the name of the role you want to add to the policy.

The Roles pane displays the selected role.

- c. Optionally add more roles as required.

- d. Click **Save**.

The Search and Select: Username page appears.

7. Add resources as follows:

- a. Click **Add** in the Resources pane.

A new line appears in the pane, showing the resource type and resource name.

- b. From the Type list, select one of the resource types:

- Application
- Contract
- Contract Line Item
- Organization
- Services
- Territory
- User.

- c.** Beside the name field, click **Search**.

The Search and Select: Name page appears.

- d.** In the Type field, enter the name of the resource. For example, if you selected organization as the type, enter the name of the organization. Click **Search**.

The Search and Select: Name page reappears, displaying all resources meeting the search criteria.

- e.** Select the relevant resource, then click **OK**.

The Policies and Assignments page reappears, displaying the updated policy.

- 8.** Click **Save**.

The Policies and Assignments page reappears, displaying the new policy.

Related Topics

[Managing Policies and Assignments](#)

[Viewing Assignments](#)

[Managing Policies](#)

[Adding a Policy](#)

[Account Management for Customer Users](#)

Customizing Your User Profile

Oracle Advanced Monitoring and Resolution provides the ability to update your user profile, including contact information and preferences.

Prerequisites

- You are the Oracle Advanced Monitoring and Resolution Customer User Administrator for your organization.

To customize your user profile:

- 1.** Log in to Oracle Advanced Monitoring and Resolution.

The Oracle Advanced Monitoring and Resolution Home page appears.

- 2.** Click the **Accounts** tab, then select your organization name from the Organization list in the top right corner of the View Accounts page.

The View Accounts page reappears, displaying all contacts for the selected organization.

- 3.** Click **Users and Groups** in the left pane. Then click **User Profile**.

The User Profile page appears.

4. Modify the following fields as required, then click **Save**.

Area	Field	Description
Username	Title	One of the following values: <ul style="list-style-type: none"> ■ Miss ■ Mr ■ Mrs ■ Ms
	User Type	
	First Name	Your first name
	Last Name	Your last name
	Home Page	URL for your home page
Preferences	Language	Your preferred display language
	Time Zone	Time zone in which you work
	Date Format	Format to be used when displaying dates
	Time Format	Format to be used when displaying time
Contact Information	E-mail Address	Your e-mail address
	Notification	Check this check box to receive notifications from MCSP to this e-mail address
	Phone Numbers	Phone number corresponding to the e-mail address entered Type of phone number, having one of the following values: <ul style="list-style-type: none"> ■ Home ■ Mobile/Cell ■ Office
Addresses	Add Address	Add postal addresses as required.

The updated User Profile appears, displaying the new information.

Related Topics

[Viewing Contracts](#)

[Managing Users and Contacts](#)

[Managing Groups](#)

[Managing Policies and Assignments](#)

[Customizing Your User Profile](#)

[Account Management for Customer Users](#)

Using Configuration Management System

This chapter describes the Configuration Management System (CMS) in Oracle Advanced Monitoring and Resolution. It 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](#)

Note: If you cannot see the **Advanced Monitoring** tab when you log in to Oracle Advanced Monitoring and Resolution, contact your Oracle Advanced Monitoring and Resolution customer user administrator.

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).

The ability to manipulate configuration data is controlled by roles and privileges and is primarily the domain of Oracle. Customer user privileges are most often focused on read-only and reporting activities.

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 Oracle Advanced Monitoring and Resolution 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.
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.

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 Oracle Advanced Monitoring and Resolution users to access and manage their Configuration Items (CIs).

The scope of actions available to you in CMS Browser depends on your organization:

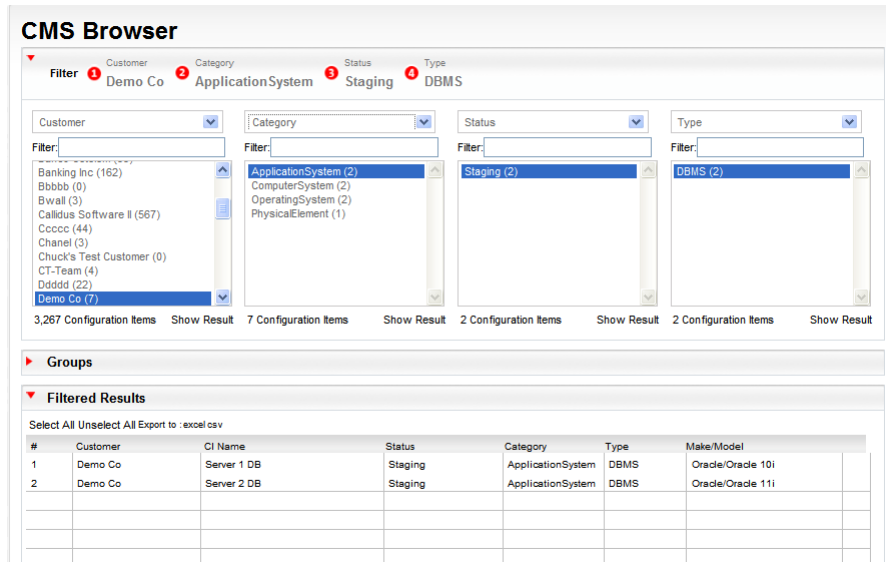
- Service delivery users can access CIs that belong to their customers and can manage CIs they are authorized to access.

- Customer users can access their own CIs only. Customer users are allowed to search and view detailed information on their own CIs only.

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



Filter Area

Use the Filter option to select multiple CIs based on multiple criteria. There are four filters in CMS Browser. Each filter consists 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.

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

- 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. Oracle Advanced Monitoring and Resolution 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 or modify the CI information. For more information about the Configuration Item Dashboard, see [About the Configuration Item Dashboard](#).

Using the CMS Browser

CMS Browser provides Oracle Advanced Monitoring and Resolution 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: Sun, 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 Oracle Advanced Monitoring and Resolution.
The Oracle Advanced Monitoring and Resolution Home appears.
2. From the **Advanced Monitoring** tab, 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 Oracle Advanced Monitoring and Resolution users with the ability to view and administer their CIs.

This section describes the following tasks:

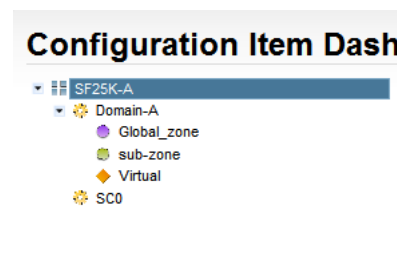
- [Using the CI Tree](#)
- [Viewing CI Parameters](#)
- [Viewing CI Groups](#)
- [Viewing Vendor Support Contracts](#)
- [Checking Production Readiness](#)
- [Viewing the Properties of a CI](#)
- [Viewing CI Attachments](#)

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, Oracle Advanced Monitoring and Resolution 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 and manage additional properties for the selected CI. Oracle Advanced Monitoring and Resolution contains a predefined list of properties for a service delivery organization. For each property, Oracle Advanced Monitoring and Resolution 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. From the **Select Facility ...** list, you can change the location of the CI.

Viewing Vendor Support Contracts

Use the Vendor Support Contracts area to view the vendor support contracts associated with the selected CI. Click **Create Vendor Support Contract** to add a vendor support contract to the list.

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. You can create a static group or add an existing group to the list.

Viewing CI Attachments

Use the Attachments area to view and download files associated with the selected CI. Click **Add Attachment** to attach a file to the selected CI.

Viewing CI Parents

Use the Parent area to view a parent of the selected CI. You can change the parent for your Physical Element CIs and Computer System CIs. From the **Select Parent ...** list, select a new parent, then click **Set**. For other CIs, Oracle Advanced Monitoring and Resolution creates the parent automatically and it cannot be changed.

Note: You can remove a CI as a parent, that is, unparent a CI by selecting an empty entry from the **Select Parent ...** list.

Note: Only Physical Elements can be parents. Physical Elements can have other Physical Elements as Parents.

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 Oracle Advanced Monitoring and Resolution.

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. Log in to Oracle Advanced Monitoring and Resolution.
The Oracle Advanced Monitoring and Resolution Home page appears.

2. On the **Advanced Monitoring** tab, select **Facilities** from the **CMS** menu.
The Facilities page appears with a list of facilities.
3. Use the Name, State, or Country columns to reorder the results.

View Cages and Racks

To view and update the cage and racks:

1. Log in to Oracle Advanced Monitoring and Resolution.
The Oracle Advanced Monitoring and Resolution Home appears.
2. On the **Advanced Monitoring** tab, select **Facilities** from the **CMS** menu.
The Facilities page appears with a list of facilities.
3. Locate the facility containing the required cage and racks, then click **Cages and Racks**.
The Cages and Racks page appears.
4. From the Facility list, select the facility where the cage is located.
5. From the Cage list, select the cage where the rack is located.
6. From the Rack list, select the required rack.
Oracle Advanced Monitoring and Resolution 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. Log in to Oracle Advanced Monitoring and Resolution.
The Oracle Advanced Monitoring and Resolution Home appears.
2. On the **Advanced Monitoring** tab, select **Manage Vendor Support Contracts** from the **CMS** menu.
The Manage Vendor Support Contracts page appears, with a list of Vendor Support Contracts created for your company.
3. 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 describes incident management in Oracle Advanced Monitoring and Resolution. It covers the following areas.

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

Note: If you cannot see the **Advanced Monitoring** tab when you log in to Oracle Advanced Monitoring and Resolution, contact your Oracle Advanced Monitoring and Resolution customer user administrator.

About Incident Ticket Management

When service impacting events occur in an IT environment and require intervention and communication, Oracle Advanced Monitoring and Resolution captures and manages this data within the Incident Management. Incident Management enables a service delivery user 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 Advanced Monitoring and Resolution 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 Oracle Advanced Monitoring and Resolution login.

To search for incident tickets:

1. Log in to Oracle Advanced Monitoring and Resolution.
The Oracle Advanced Monitoring and Resolution Home appears.
2. On the **Advanced Monitoring** tab, select **Search IM Ticket** from the **Incident** menu.

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' interface. At the top, there's a header 'Search IM Ticket' and a sub-header 'Ticket Search Criteria'. Below this, there are several input fields and checkboxes. On the right side, there are two red buttons labeled 'SEARCH IM TICKET'. The fields include: Ticket ID, Ticket External Ref ID, Ticket Summary, CI Name, Use Time Frame? (checkbox), Creation Date(Start) and Creation Date(End) (date pickers), Time Frame (dropdown), Ticket Status (checkboxes for Cancelled, Closed, Draft, On Hold, Pending Assignment, Resolved, WIP), Ticket Severity (checkboxes for 1, 2, 3), Service Interruption? (checkbox), and Ticket Tag (dropdown menu).

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

Search Criteria	Description
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 Use Time Frame if you want to search within a predefined time period, such as the last 24 hours.
Creation Date (Start)	Use the calendar icon to select a start date to create a time period within to search. Note: This field is unavailable if you select Use Time Frame .
Creation Date (End)	Use the calendar icon to select a end date for a time period within to search. Note: This field is unavailable if you select Use Time Frame
Time Frame	Select a predefined time period within to search. Note: This field is available only if you select Use Time Frame
Ticket Status	From the Ticket Status area, you can refine the search to select specific ticket status: <ul style="list-style-type: none"> ■ Cancelled ■ Closed ■ Draft ■ On Hold ■ Pending Assignment ■ Resolved ■ WIP
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. Oracle Advanced Monitoring and Resolution 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 Oracle Advanced Monitoring and Resolution.

The Oracle Advanced Monitoring and Resolution Home appears.

2. On the **Advanced Monitoring** tab, 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

Using Change Management

This chapter describes change management capabilities in Oracle Advanced Monitoring and Resolution.

It covers the following topics:

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

Note: If you cannot see the **Advanced Monitoring** tab when you log in to Oracle Advanced Monitoring and Resolution, contact your Oracle Advanced Monitoring and Resolution customer user administrator.

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

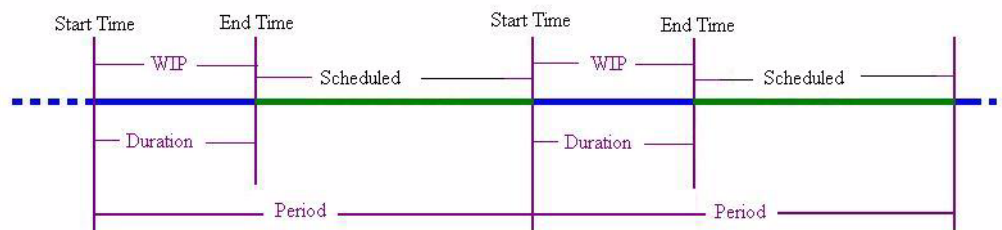
- Review and close CMs

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 Oracle Mission Critical Support Platform is placed under change control.

Example of Simple Recurring CM ticket

The figure below illustrates an example of a simple recurring CM ticket given the following parameters: Recurring flag set = 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 Oracle Advanced Monitoring and Resolution. 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**. Oracle Advanced Monitoring and Resolution 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 a New Change Management Ticket

Use this procedure to create a new CM ticket:

1. Log in to Oracle Advanced Monitoring and Resolution.
The Oracle Advanced Monitoring and Resolution Home appears.
2. Click the **Advanced Monitoring** tab.
The Advanced Monitoring page appears.
3. From the Change menu, select **Create CM Ticket**.
The Create CM Ticket page appears.
4. 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 Oracle Advanced Monitoring and Resolution 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 OM Platform.
 - Support - *OMP area*: Indicates changes from the Oracle Service Delivery team relating to a specific area of OM 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

5. 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 Oracle Advanced Monitoring and Resolution, but the implementer of the CM ticket might not be a registered user.

- 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 Implementer 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.

6. 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.

7. 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.
8. 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 Oracle Advanced Monitoring and Resolution 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.
9. In the Scheduling area, define the following information:

Note: You must have appropriate privileges 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 Oracle Advanced Monitoring and Resolution 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: Oracle Advanced Monitoring and Resolution 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 the *Mission Critical Support Platform Customer User Administrator Guide*.

- 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: Oracle Advanced Monitoring and Resolution 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 the *Mission Critical Support Platform Customer User Administrator Guide*.

- 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). Oracle Advanced Monitoring and Resolution displays a confirmation window, reminding you that this setting is for DST calculations only. Click **OK** to continue.
10. 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.
11. 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.
12. You can save the CM ticket as a draft or submit the CM ticket.
- To save the CM ticket, click **SAVE AS DRAFT**.
Oracle Advanced Monitoring and Resolution 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**.
Oracle Advanced Monitoring and Resolution 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, Oracle Advanced Monitoring and Resolution displays the Create CM Ticket page with all the fields pre populated from the existing CM ticket you cloned. You must review the information on the page and modify the data as appropriate.

To clone a CM ticket:

1. Log in to Oracle Advanced Monitoring and Resolution.
The Oracle Advanced Monitoring and Resolution Home appears.
2. Click the **Advanced Monitoring** tab.

The Advanced Monitoring page appears.

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

The Change Management page appears.

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

The View CM Ticket or Update CM Ticket page appears.

5. Click **CLONE**.

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

Note: Oracle Advanced Monitoring and Resolution does not copy any time or date information or schedule-related data from the existing CM ticket.

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**.

Oracle Advanced Monitoring and Resolution 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**.

Oracle Advanced Monitoring and Resolution 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 Oracle Advanced Monitoring and Resolution.

To search for a CM ticket:

1. Log in to Oracle Advanced Monitoring and Resolution.
The Oracle Advanced Monitoring and Resolution Home appears.
2. Click the **Advanced Monitoring** tab.
The Advanced Monitoring page appears.
3. 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

The screenshot shows the 'Search CM Ticket' page with the following search criteria fields:

- Ticket ID:
- External ID:
- Related ID:
- CI Name:
- Date Type:
- Begin Date:
- Time Frame:
- End Date:
- Ticket Status:
- Recurring:
- Organization:
- Implementor:
- Owner:

A red **SEARCH** button is located at the bottom right of the form.

4. 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. Note: The Begin Date is available only when you select Custom from the Time Frame list.
End Date	Use the Calendar icon to select an end date for the time period within which to search. Note: The End Date is available only when you select Custom from the Time Frame list.

Search Criteria	Description
Ticket Status	From the Ticket Status list, select the status of the CM ticket or select All 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.
Implementer	Enter the name of the implementer to associate with the search.
Owner	From the Owner list, select the CM ticket owner that you want to associate with the search. Note: If a user is set to Inactive, then that user will not appear in the list. For information about inactive users, see the <i>Mission Critical Support Platform Customer User Administrator Guide</i> .

5. 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.

Oracle Advanced Monitoring and Resolution displays the results in the Ticket Search Results table.

6. 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 Oracle Advanced Monitoring and Resolution.

The Oracle Advanced Monitoring and Resolution Home appears.

2. Click the **Advanced Monitoring** tab.

The Advanced Monitoring page appears.

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

The Change Management page appears.

4. 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.

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

Note: If any of the CIs associated with the CM ticket are deleted since the ticket was created, then the CI name will have a line through its name. Click the callout icon beside the CI name to view the following information about the deleted CI:

- UUID
- Name and deletion date
- IP Addresses
- Location
- Customer Name
- Service Provider Name

For information about deleting CIs, see [Using the CMS Browser](#).

6. Select the WorkLog tab from the top of the CM ticket page.
The WorkLog page appears.
7. Review the information on the Worklog page as required.
8. Select the Attachments tab from the top of the CM ticket page.
The Attachments page appears.
9. 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.

Note: Users with the appropriate privileges can select a CM ticket to update. When you select a CM ticket to update, Oracle Advanced Monitoring and Resolution 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

To update a CM ticket:

1. Log in to Oracle Advanced Monitoring and Resolution.
The Oracle Advanced Monitoring and Resolution Home appears.
2. Click the **Advanced Monitoring** tab.
The Advanced Monitoring page appears.
3. From the Change menu, select **Change**.
The Change Management page appears.

4. 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.

5. Update the information on the Ticket Details subpage as required. For information about this page, see [Create a New Change Management Ticket](#).

Note: If any of the CIs associated with the CM ticket are deleted since the ticket was created, then the CI name will have a line through its name. Click the bubble icon beside the CI name to view the following information about the deleted CI:

- UUID
- Name and deletion date
- IP Addresses
- Location
- Customer Name
- Service Provider Name

For information about deleting CIs, see [Using the CMS Browser](#).

6. From the top of the CM ticket page, select the WorkLog tab.

The WorkLog page appears.

7. To add a worklog entry (available only to users with the appropriate privileges), 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, Oracle Advanced Monitoring and Resolution 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**.

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

The Attachments page appears.

9. 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 Ticket

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

Note: The CM ticket assignment sends an automated e-mail to the appropriate service delivery 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 Implementer, then the system notifies both the former and current Implementers.

To assign the CM ticket:

1. Log in to Oracle Advanced Monitoring and Resolution.
The Oracle Advanced Monitoring and Resolution Home appears.
2. Click the **Advanced Monitoring** tab.
The Advanced Monitoring page appears.
3. From the Change menu, select **Change**.
The Change Management page appears.
4. On the Change Management page, find the CM ticket you want to assign, then click **Update**.
The Update CM Ticket page displays.
5. 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.
6. 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.
7. The action of assigning the CM ticket causes Oracle Advanced Monitoring and Resolution 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, Oracle Advanced Monitoring and Resolution updates the CM ticket status to Pending Approval and sends an e-mail notification to the assigned implementer. If the CM ticket is implemented by the customer or multiple parties, Oracle

Advanced Monitoring and Resolution updates the CM ticket status to Pending Scheduling.

Submitting Change Management Ticket

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 privileges 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.

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.

To submit a CM ticket:

1. Log in to the Oracle Advanced Monitoring and Resolution.
The Oracle Advanced Monitoring and Resolution Home appears.
2. Click the **Advanced Monitoring** tab.
The Advanced Monitoring page appears.
3. From the Change menu, select **Change**.
The Change Management page appears.
4. 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.
5. 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](#).
6. 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 Implementer(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.

Scheduling Change Management Ticket

Use this procedure to schedule a CM ticket for automatic implementation. CM tickets can be scheduled to start either automatically by the system 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.

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

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 Oracle service delivery engineer, then the service delivery engineer must review and approve the change before it can be scheduled.

To schedule a CM ticket:

1. Log in to Oracle Advanced Monitoring and Resolution.
The Oracle Advanced Monitoring and Resolution Home appears.
2. Click the **Advanced Monitoring** tab.
The Advanced Monitoring page appears.
3. From the Change menu, select **Change**.
The Change Management page appears.
4. 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.
5. 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 Ticket](#).
6. In the Change Information area, specify whether to filter events for the impacted Configuration Items 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.
7. 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 Oracle Advanced Monitoring and Resolution 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.

Oracle Advanced Monitoring and Resolution performs the following:

– **Set the CM ticket status to Scheduled**

Oracle Advanced Monitoring and Resolution 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.

- Add a Worklog entry for scheduling.
- Trigger 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.
- Notify the following: Change Implementer(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. Oracle Advanced Monitoring and Resolution 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>Note: 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"> ■ 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. ■ 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.
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"> ■ 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. ■ 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.

Approving Change Management Ticket

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

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 service 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.

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

To approve a CM ticket:

1. Log in to Oracle Advanced Monitoring and Resolution.
The Oracle Advanced Monitoring and Resolution Home appears.
2. Click the **Advanced Monitoring** tab.
The Advanced Monitoring page appears.
3. From the Change menu, select **Change**.
The Change Management page appears.
4. 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.
5. On the Update CM Ticket page, review the details for the CM ticket and then do one of the following:
 - a. Select **APPROVE** to approve the CM ticket. The action of approving a CM ticket causes Oracle Advanced Monitoring and Resolution 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 Implementer(s), Change Owner, 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.
 - 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 Implementer(s), Change Owner, Change Requester, Change Approver, and Mail 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

Starting Change Management Ticket

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.

After 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 privileges 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 Oracle Advanced Monitoring and Resolution, click the **Advanced Monitoring** tab, then 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 Implementer(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 the system 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. Once a CM ticket is being worked on, you may click **COMPLETE** to complete the work for a CM ticket ahead of the scheduled end time; otherwise the system automatically completes the implementation once the End Date scheduled for a CM ticket is reached.

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

To manually complete a CM ticket:

1. Log in to Oracle Advanced Monitoring and Resolution, click the **Advanced Monitoring** tab, then navigate to the Change menu. The system displays the Change Management page.
2. On the Change Management page, find 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 displays.
3. On the Update CM Ticket page, select the Complete action button.

When you click Complete, the Change Management service 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 will change to Completed.

Note: For recurring CM tickets, Oracle Advanced Monitoring and Resolution displays a message, informing you that completing this CM ticket completes the CM ticket permanently.

4. The action of completing 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 completed the CM ticket.
 - Advance the CM ticket to the Complete status.
 - Notify the following: Change Implementer(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 a Change Management Ticket

CM Tickets can be closed either automatically by the system or manually by selecting the Close action button. 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. Once a CM ticket is completed, you may click the Close button to close the CM ticket; otherwise the system automatically closes the CM ticket once its timestamp reaches 24 hours in the Completed status. Wherever possible, you should always close a CM ticket when work is complete.

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

To manually close a CM ticket:

1. Log in to Oracle Advanced Monitoring and Resolution.
The Oracle Advanced Monitoring and Resolution Home appears.
2. Click the **Advanced Monitoring** tab.
The Advanced Monitoring page appears.
3. From the Change menu, select **Change**.
The Change Management page appears.
4. 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.
5. 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 will change to CLOSED.

6. The action of closing a CM ticket causes the Oracle Advanced Monitoring and Resolution 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 closed the CM ticket.
 - Advance the CM ticket to the Closed status.

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

Cancelling Change Management Ticket

You can cancel a CM ticket anytime before its status is set to Completed. 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 privileges to cancel a CM ticket.

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

To cancel a CM ticket:

1. Log in to Oracle Advanced Monitoring and Resolution.
The Oracle Advanced Monitoring and Resolution Home appears.
2. Click the **Advanced Monitoring** tab.
The Advanced Monitoring page appears.
3. From the Change menu, select **Change**.
The Change Management page appears.
4. Locate the CM ticket you want to cancel (look for CM tickets with the status set to Draft, Pending Approval, Pending Scheduling, Scheduled, or WIP); then click **Update**. The Update CM Ticket page displays.
5. On the Update CM Ticket page, select **CANCEL**.
6. In the Cancel Change Ticket window, provide a reason for canceling the CM ticket, then click **CANCEL REQUEST** to cancel the CM ticket.
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 will change to CANCELED.
7. The action of canceling a CM ticket causes Oracle Advanced Monitoring and Resolution 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 Implementer(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.

Using Problem Management

This chapter describes problem management in Oracle Advanced Monitoring and Resolution. It covers the following topics:

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

Note: If you cannot see the **Advanced Monitoring** tab when you log in to Oracle Advanced Monitoring and Resolution, contact your Oracle Advanced Monitoring and Resolution customer user administrator.

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 Oracle Advanced Monitoring and Resolution.

To search for a PM Ticket:

1. Log in to Oracle Advanced Monitoring and Resolution.
The Oracle Advanced Monitoring and Resolution Home appears.
2. Click the **Advanced Monitoring** tab.
The Advanced Monitoring page appears.
3. From the Problem menu, select **Search PM Tickets**.

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

Figure 6-1 Search PM Ticket Page

The screenshot shows a web form titled "Search PM Ticket". Under the heading "Search Criteria", there are several input fields and dropdown menus:

- Ticket ID: [text input]
- Summary: [text input]
- Related External ID: [text input]
- Related Incident ID: [text input]
- Date Type: [dropdown menu, currently set to "Creation Date"]
- Time Frame: [dropdown menu, currently set to "- All -"]
- Begin Time: [calendar icon]
- End Time: [calendar icon]
- Customer: [dropdown menu, currently set to "AT&T Rexam"]
- Priority: [dropdown menu, currently set to "- All -"]
- Ticket Status: [dropdown menu, currently set to "- All -"]

 A red "SEARCH" button is located at the bottom right of the form.

- 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. Note: You must have appropriate privileges 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 All to search for PM Tickets of all status.
Resolution Code	Reason for resolving PM Ticket. Note: This option is available for tickets with a Resolved or Closed status only.

- 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.

Oracle Advanced Monitoring and Resolution displays the results in the Ticket Search Results table.

- 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 Oracle Advanced Monitoring and Resolution.
The Oracle Advanced Monitoring and Resolution Home appears.
2. Click the **Advanced Monitoring** tab.
The Advanced Monitoring page appears.
3. 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.

4. 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.
5. Review the Ticket Details page as required.

Using Summary Reporting

This chapter describes the summary reporting capabilities of Oracle Advanced Monitoring and Resolution. It covers the following topic areas:

- [Report List](#)
- [Generating Availability Reports](#)
- [Generating Event Reports](#)
- [Generating External Reports](#)
- [Viewing Queries](#)
- [Viewing Reports](#)
- [Viewing Subscription Summaries](#)
- [Creating SLA Reports](#)

Note: If you cannot see the **Advanced Monitoring** tab when you log in to Oracle Advanced Monitoring and Resolution, contact your Oracle Advanced Monitoring and Resolution customer user administrator.

Report List

The Oracle Advanced Monitoring and Resolution 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 privileges.

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 privileges 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.

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 Oracle Advanced Monitoring and Resolution.

Generating Availability Reports

The Availability Reporting function collects and analyzes data from the event logs of monitored servers and then generates configurable reports that users can view and customize to suit the needs of their organization. Users can 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. Users can enter parameters, such as specific periods of time, to filter the data presented.

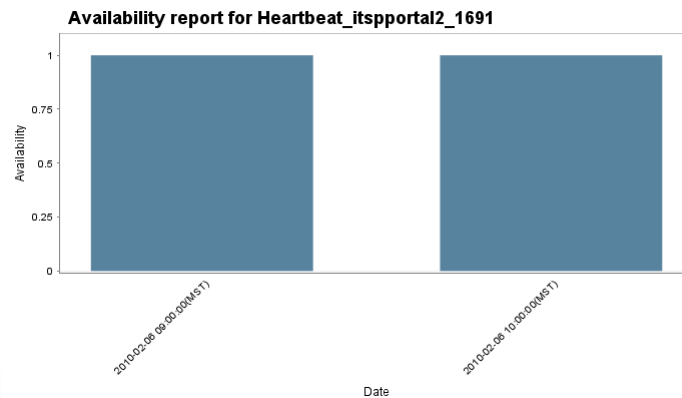
Availability reports provide the following advantages:

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

Oracle Advanced Monitoring and Resolution generates an availability report similar to [Figure 7-1](#).

Figure 7-1 Example of an Availability Report

Generating 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 Oracle Advanced Monitoring and Resolution.
The Oracle Advanced Monitoring and Resolution page appears.
2. Click the **Advanced Monitoring** tab.
The Advanced Monitoring page appears.
3. From the Reports menu, select **Event Reports**.
The Event Reporting page appears.
4. On the Event Reporting page, decide whether you want to search events by Incident Ticket Number or Event Attributes.
5. If searching by ticket number, enter the number of the Incident Ticket for which you want to search for associated events.
6. If searching by attributes, enter the appropriate search criteria from the available fields; then click **SEARCH**.

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.

7. 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
8. You can click the + (plus) sign for additional details on the reported event.
 9. Repeat the steps as required to generate another event report.

Generating 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 Oracle Advanced Monitoring and Resolution.
The Oracle Advanced Monitoring and Resolution page appears.
2. Click the **Advanced Monitoring** tab.
The Advanced Monitoring page appears.
3. From the Reports menu, select **External Reports**.
The External Report List page appears.
4. Click **Add External Report**.
The Add External Report area appears on the page.
5. Complete the Add External Report area as required.
6. Click **SAVE**.

Viewing Queries

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. From the Reports menu, select Reports.
The Report List dashboard page appears.
2. From the Queries table, locate the query you want to view, then click the Query Name.
The View Query - *Query_Name* page appears.

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

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

f. Click **EXECUTE QUERY**.

Oracle Advanced Monitoring and Resolution generates the query for your company and date or time window you selected and displays the data in the Query Results area.

4. 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.

Viewing Reports

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 Oracle Advanced Monitoring and Resolution.
The Oracle Advanced Monitoring and Resolution page appears.
2. Click the **Advanced Monitoring** tab.
The Advanced Monitoring page appears.
3. From the Reports menu, select **Reports**.
The Reports List page appears.
4. Locate the report you want to view, then click the Report Name.

The View Report page appears.

5. 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**.
The system generates the report for the customer organization and date/time window you selected and displays the data in the Report Results area.
6. 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.

Creating Subscriptions

When you create a subscription, you instruct Oracle Advanced Monitoring and Resolution 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 Oracle Advanced Monitoring and Resolution.
The Oracle Advanced Monitoring and Resolution page appears.
2. Click the **Advanced Monitoring** tab.
The Advanced Monitoring page appears.
3. From the Reports menu, select **Create Subscription**.
The Create Subscription page appears.
4. In the Subscription Title box, enter a name for the report subscription, for example, *Jim's daily update of CMS inventory*.
5. From the Report list, select the report you want to schedule to be delivered to a subscriber list.
6. 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).
7. 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.

8. From the Time Zone list, select the time zone region associated with sending the report.
9. From the Date Format list, select the date format associated with sending the report.
10. From the Time Format list, select the time format associated with sending the report.
11. From the E-mail Format list, select the format in which to send the report.
12. Select **Archive Report** if you want to view reports from the archive from the Subscription Summary page.
The Max Archives box appears.
13. Enter the maximum number of reports that you want to archive. 10 is the default maximum.
14. From the Subscribers area, select the report recipients by selecting the appropriate subscriber e-mail list.
15. Click **SUBSCRIBE**
The **Choose reason** box appears.
16. From the list, select a reason for subscribing to the report, then click **CONFIRM**.
Oracle Advanced Monitoring and Resolution creates the subscription and schedules the report to be delivered to the selected subscribers.

Viewing Subscription Summaries

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.

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

To view the Subscription summary:

1. Log in to Oracle Advanced Monitoring and Resolution.
The Oracle Advanced Monitoring and Resolution page appears.
2. Click the **Advanced Monitoring** tab.
The Advanced Monitoring page appears.
3. From the Reports menu, select **Subscription Summary**.
The Subscription Summary page with a list of subscriptions appears.
4. 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.

View Reports from the Archive

If you selected the Archive Report option when you created your subscription, then you can view the reports from the Subscription Summary page.

To view archived reports:

1. Log in to Oracle Advanced Monitoring and Resolution.
The Oracle Advanced Monitoring and Resolution page appears.
2. Click the **Advanced Monitoring** tab.
The Advanced Monitoring page appears.
3. From the Reports menu, select **Subscription Summary**.
The Subscription Summary page with a list of subscriptions appears.
4. From the Subscription Summary page, locate the subscription that you want to edit.
5. From the View Archives column, click **View**.
The Archives page appears.
6. Locate the required report, then click **View**.
The *Subscription_Name* page appears.

Creating SLA Reports

Oracle Advanced Monitoring and Resolution enables you to generate reports about service level agreements (SLAs):

To create an SLA report:

1. Log in to Oracle Advanced Monitoring and Resolution.
The Oracle Advanced Monitoring and Resolution page appears.
2. Click the **Advanced Monitoring** tab.
The Advanced Monitoring page appears.
3. From the Reports menu, select **Create Report**.
The Create Report page appears.
4. From the Report Type list, select **SLA**.
5. In the Report Title box, enter a name for the SLA report.
6. From the Access Type list, select the type of access to the report.
7. From the Customer list, select the customer organization associated with the report.
8. In the Description box, optionally provide a description of the report.
9. From the Queries list, select one or more queries you want to use to build the report; then click **Add** to move the query to the Selected Queries window.
10. To add report parameters that the user must complete when running the report:
 - a. Under **Report Parameters**, click **Add**.
The Add Parameter window appears.
 - b. Select the parameter type, enter the name, and title to be displayed to the user.

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