

















Common Icons in LMS (Legal Management System):

The Legal Management System application executes in the ServiceNow system environment and utilizes multiple icons, each with different functions and support. Below is a list of most common icons used throughout the application.

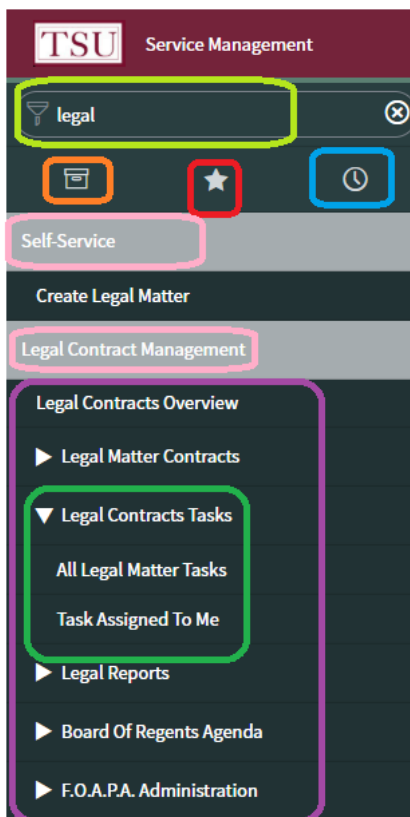
-  Drop-down arrow on a field to display a list of values to select for the field.
-  Search for a field value.
-  Displays related incident records associated with the record.
-  Hovering cursor over the icon to display additional field information.
-  Calendar icon to select a date value.
-  Filter icon provides the ability to select the types of items displayed in a log or list.
-  Click Ellipses for additional "options".
-  Attach a file. An explorer window opens requesting the file location to be attached.
-  Show Activity Stream in fly out window. Activity stream is a list of entries in records and conversations.
-  Gear Icon will update a personalized list.
-  List controls, provides multiple data options, i.e. sorting, grouping, reporting, import/export, etc.
-  Allows user to lock or unlock watch list for a request.
-  Bust icon with plus sign add user to a watch list on requests.
-  Show one journal entry.
-  Show all journal entries.
-  Email

Note: All application Icons support hover capability providing a short description of its purpose.

Application Management – Fulfiller Administration

The following section is a general overview of Fulfiller administration process options, features and settings to successfully complete processing a request.

Fulfillers are responsible for processing user generated requests and moving them through the Legal Management System workflow. The application area is known as the “back-end” or “Fulfiller’s work area”. Fulfiller access is setup by the system administrators; user role settings determine what fulfillers can and cannot see or access. A sample display of the LCM (Legal Contract Management) landing page Fulfillers will see after logging into ServiceNow is shown below (Fig B-1).



The Filter Navigation box is used to search for applications within the ServiceNow application.

Lime Tag – Enter text to find applications. Entered “legal” (no quotes) to list Legal Contracts Management applications.

Orange Tag – Click to list all applications.

Red Tag – List of User Favorites.

Blue Tag -- List of User history.

Pink Tag – Application Header.

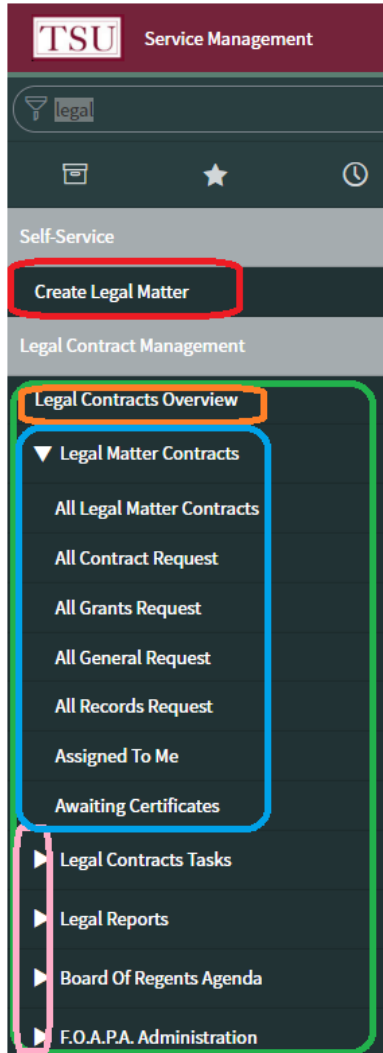
Purple Tag – All applications belonging to Legal Contracts Management; a result of the search using “legal” in the navigation bar.

Green Tag – Expanded list of applications within the Legal Contracts Tasks. Click triangle to open/close.

Fig. B-1

****NOTE:** Application access is managed by role (permission) properties assigned by the system administrator. What the User & Fulfiller can/cannot see or access is based on the defined roles.

Below, the expanded modules of the Legal Management System.



Red Tag -- Create Legal Matter launches LMS portal.

Green Tag – List of all LMS applications (result from search of “legal” in navigation bar).

Orange Tag – Header

Blue Tag – List of Legal Matter Contracts (header) – expanded.

- All Legal Matter contracts (all active contracts)
- All Contract Request – Contracts only.
- All Grant Request – Grants only.
- All General Request – General only.
- All Records Request – Records only.
- Assigned To Me – List of assigned requests to logged in user.
- Awaiting Certificates – Pending insurance certificate approval.

Pink Tag – Toggle to open and close applications.

Fig. B-2

LMS (Legal Management System) Application – Data Lists

Please reference the Icon guide on [page 11](#) for descriptions and functionality within the application.

Note: All icons support hovering capabilities providing a short description for any icon in LMS.

Search a List

Click the magnifying glass icon (Red Tag) to toggle the search boxes to display/hide below each header field, Blue Tag. Enter search criteria in a column Blue Tag. Wildcard characters % or * as defined below.

To perform a single-character wildcard search, use the percent sign (%) character. This wildcard finds words that contain any one character in place the percent-sign-character. For example, to find words such as **text** or **test**, search for: t e % t

To perform a multiple-character wildcard search, use the asterisk (*) character. This wildcard finds words that contain zero or more characters in place of the asterisk-character. For example, to find words such as **planned** or **placed**, search for: p l * d

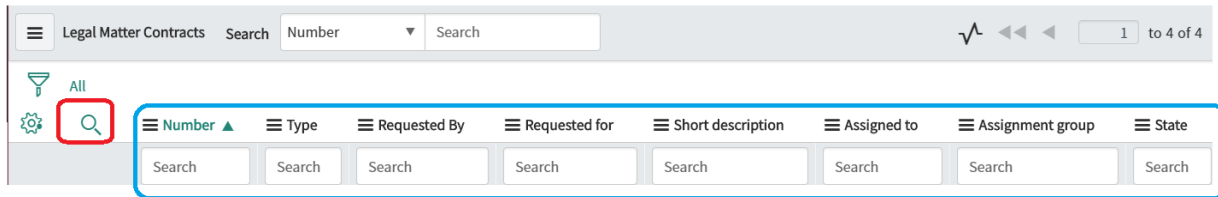
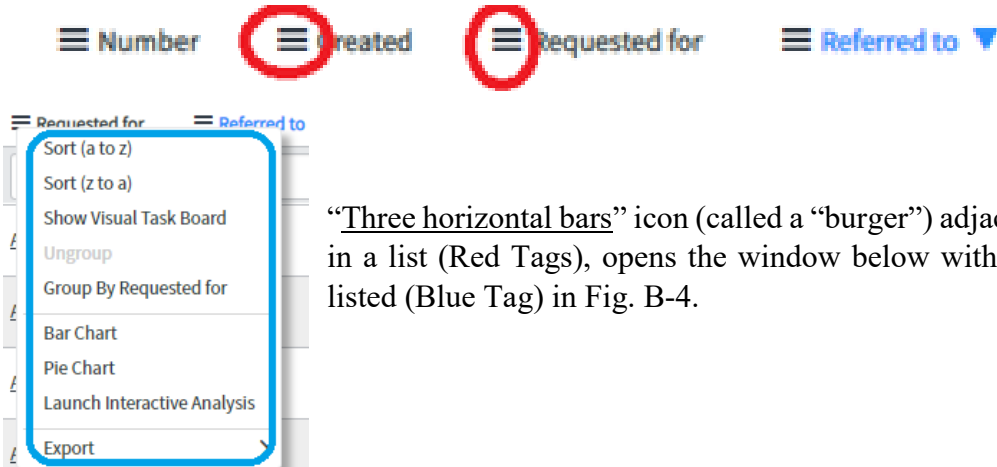


Fig. B-3

Column Name List options



“Three horizontal bars” icon (called a “burger”) adjacent to a column name in a list (Red Tags), opens the window below with the available options listed (Blue Tag) in Fig. B-4.

Fig. B-4

Column Field options

“All Legal Matter Contracts” (Gray Tag) to the left of the display page in Figure B-5 displays a list of all requests created in the system. Hover cursor to the right of “All Legal Matter Contracts” until *star* icon (lime green tag), appears. If clicked (becomes solid white) “All Legal Matter Contracts” is added to the user favorites.

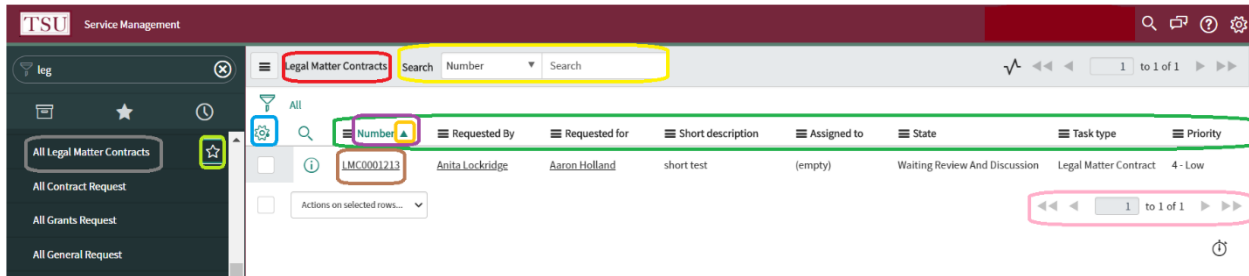


Fig. B-5

- Red Tag – Program header “Legal Matter Contracts”.
- Blue Tag – Gear icon, when selected, offers option to select/remove column fields to be displayed in the list (see Fig. B-6 below).
- Yellow Tag -- Search field. Default field is first item in the header column list, in this case, Number (Green Tag). Any part of a search value can be entered and the system will return matching values. The Search item can be changed by clicking on the inverted triangle – on the right of “Number”.
- Orange Tag – Sorts column data.
- Green Tag – Data fields displayed in list.
- Brown Tag – A system record identifier for any request created in the application portal. Each record begins with a 3-character identifier, i.e. **LMC** for Legal Matters Contracts and **BOA** for Board of Regents Agenda, followed by a unique 7-digit number to make the record exclusive in the system.
- Pink Tag – Paging through list.

Modify Lists

In Fig. B-5 above, specifically the Blue Tag, selecting the gear icon displays the following window, Fig. B-6. Columns listed in any list can be re-arranged, removed or added to any current list.

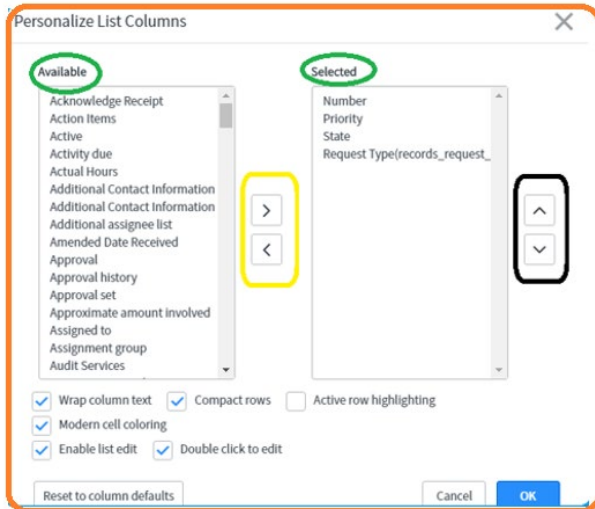
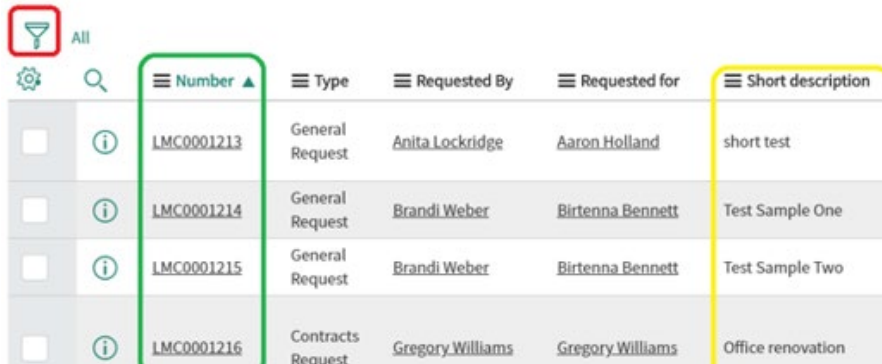


Fig. B-6

- Orange Tag – The “Personalize List Columns” screen opens.
- Yellow Tag – List of “Available” and “Selected” columns (Green Tags) can be moved to/from each section using < or > toggle buttons.
- Black Tag -- Highlight “Selected” column items to move up or down using the buttons.
- “OK” saves changes; “Cancel” to exit, changes are not saved.

Filter a Data List

Below is a sample list of data with 4 records. In this example, the user wishes to only select records with 'test' in the context of Short Description. Fulfillers can query data utilizing the Filtering Icon.

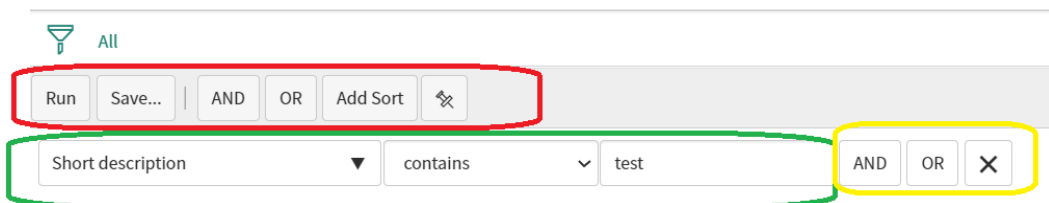


	Number	Type	Requested By	Requested for	Short description
<input type="checkbox"/>	LMC0001213	General Request	Anita Lockridge	Aaron Holland	short test
<input type="checkbox"/>	LMC0001214	General Request	Brandi Weber	Birtenna Bennett	Test Sample One
<input type="checkbox"/>	LMC0001215	General Request	Brandi Weber	Birtenna Bennett	Test Sample Two
<input type="checkbox"/>	LMC0001216	Contracts Request	Gregory Williams	Gregory Williams	Office renovation

Fig. B-7

- Red Tag – Filter Icon
- Green Tag – Record numbers
- Yellow Tag – Record Short description

Click the 'Filter' Icon (Red Tag) Fig. B-8, to open the following filter screen:



Filter screen showing a search bar with the filter 'Short description' and the value 'test'. The filter is set to 'contains'. The filter logic is set to 'AND'. The filter is currently active.

Fig. B-8

- Red Tag – Filter commands:
 - “Run” the existing filter;
 - “Save” the existing filter;
 - Modify the existing filter by adding **AND/OR** logic;
 - “Pin” the filters, will display in your list.
- Green Tag -- Displays executing filter
- Yellow Tag -- Add AND/OR logic filter

Filter Results:

Only records with text “test” are listed.

	LMC0001219	Contracts Request	4 - Low	Waiting Signature Completion (empty)	Test Page
	LMC0001221	Contracts Request	4 - Low	Waiting For Task Completion From (empty) (OIC)	test
	LMC0001225	Contracts Request	4 - Low	Waiting For Task Completion From (empty) (OIC)	Test

User Application Management – Fulfiller walk through

LMC record administration for back-end Fulfillers/Approvers have many similarities in application concepts, screen formats and processes. The following four sections is a demonstration of primary work flow steps Fulfillers perform to process a request.

Contracts request record LCM0001216 is the demonstration record for the four sections.

Section 1 of 4 – Header

Section 1 of 4 displays the “Header” portion of the record contents. These values represent system provided and user intake form values; common/general information is presented. The tagged items/icons (Fig. B-9) with definitions below the display.

Legal Matter Contract
LMC0001216

Number: LMC0001216 (Red Tag)

Type: Contracts Request (Red Tag)

Requested By: Gregory Williams (Red Tag)

Requested for: Gregory Williams (Red Tag)

Created: 06/08/2020 04:08:25 PM (Red Tag)

Assignment group: TSU Office of General Counsel (Red Tag)

Assigned to: (Red Tag)

Priority: 4 - Low

State: Waiting For Task Completion From (OIC)

Short description: Office renovation

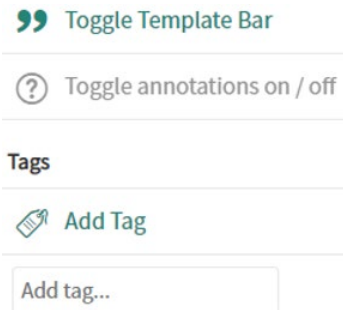
Description: Construction services to renovate my office by including a built-in bar.

Toolbar: Follow Update

Fig. B-9

- Red Tags – greyed out fields from the intake form – cannot edit.
- Yellow Tag – used to attach any file(s) to this record.
- Blue Tag – takes user to Activity Screen (in section 2).
- Pink Tag – option to show/hide fields on the form, but **strongly recommended** to refrain from manipulating fields within this option.
- Orange Tag – “More Options” icon.

- a. Most important is Add Tag. It is a personal note for the fulfiller and used as search value for the record.



- Lime Tag – “Follow” button: when enabled, the fulfiller receives notifications for any new comments entered for the record. Click button “Unfollow” to disable.
- Brown Tag – “Update” to save record changes.
- Purple Tag – Up and Down arrows – forward and backward movement of records.

Section 2 of 4 – Notes Tab - Record Activity

Section 2 of 4 of record LMC0001216 displays the NOTES tab (Fig. B-10). When the icon is selected, the display rolls the activity screen to the top of the current page. The sample below displays record note entries of the record. Notice this section contains 2 tabs on the top left corner of the screen display (Navy Blue Tag). The current display is the Notes tab.

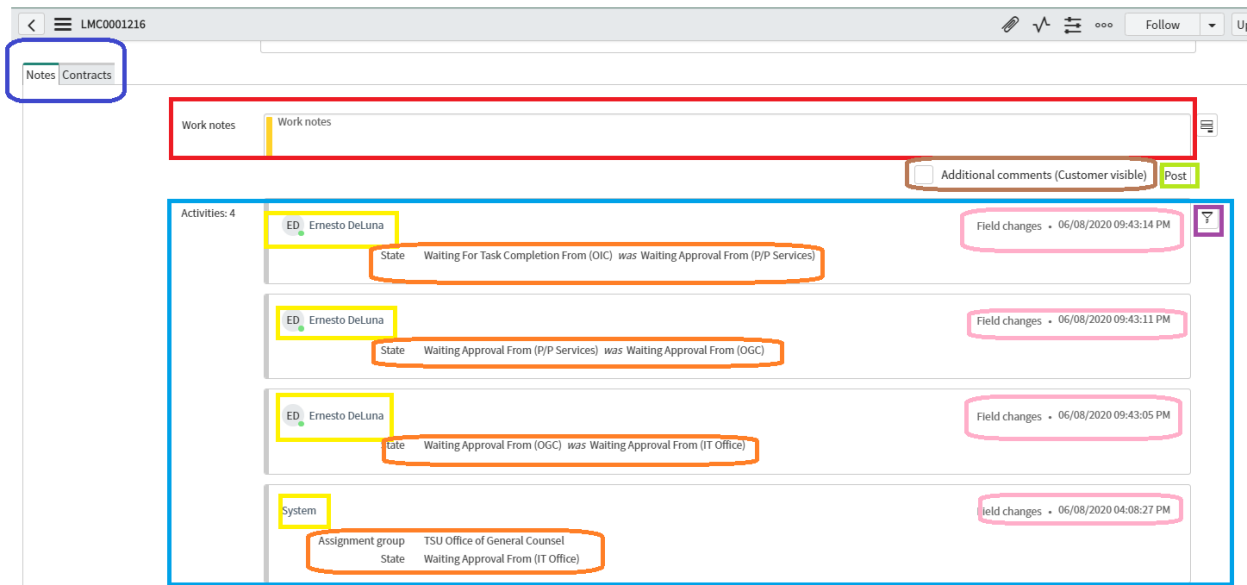


Fig. B-10

- Navy Blue Tag – Record Tabs (Notes for this example, Contracts follows).
- Red Tag – can enter new record notes.
- Lime Tag – click POST to add the work notes.
- Brown Tag – when checked, customer can see notes entered for new entry.

- Blue Tag – all record activity.
- Yellow Tag – previously posted work notes.
- Orange Tag – system generated posted note of an approval group.
- Pink Tag – system produced time-stamp of work note entry.
- Purple Tag – records with lengthy note activity can be difficult to read. The filter icon allows the fulfiller to filter by specific values.

Section 3 of 4 – Contacts Tab – Intake form data

Section 3 of 4 of record LMC0001216 CONTRACTS tab (Fig. B-11) is displayed below. The information displayed are the values entered by the requestor on the intake form for this record. These values can be manipulated by Fulfillers.

Acknowledgement	<input checked="" type="checkbox"/>	Contract Category	New Agreement
Requires Board Approval?	-- None --	Contracting Party Name	Construction Criminals LLC
Involves Info Tech?	-- None --	TIN/EIN	55855578921
Board Agenda Submitted?	-- None --	Contract Name	John Crook
Board Agenda Ticket		Contract Amount	125000
Rpts to Leglsl Budget Board?	-- None --	Expenditure/Revenue Generating	Expenditure
Contract Type Form	Vendor Agreement	Contracting Party Address	2225 Penitentiary Way
Initiating Department	Procurement Services	Contracting Party Telephone	713-225-8566
Department Email	Gregory.Williams@tsu.edu	Contracting Party Fax	7132258562
Department Extension	ext 7918	Contracting Party Email	john.crook@constructioncriminals.com
Best Value	<input type="checkbox"/>	Contract Start Date (MM/dd/yyyy)	07/06/2020
Emergency Justification	<input type="checkbox"/>	Contract End Date (MM/dd/yyyy)	07/10/2020
Open Market	<input type="checkbox"/>	Funding Source	Local
Selection Committee	<input type="checkbox"/>	Certificate of Insurance required	Yes
Sole Source Justification	<input checked="" type="checkbox"/>	Fund	1000
Other	<input type="checkbox"/>	Organization	Auxiliary Administration
		Account	Construction/Improve of Buildings
		Program	Bldg 101- Hannah Hall (IKE)

Fig. B-11

Section 4 of 4 – Workflows, Approver Groups

Section 4 of 4 of record LMC0001216 is displayed below. User requests require various reviews, approvals, meetings, and information before a request can be finalized and granted. These approval processes are automated in the LMS. Application workflows guide the path of the required reviews & approvals phases of each request. If a request is rejected, it is set to closed and no further action will be required from fulfillers. If the request totally successful in all approvals and receives final approval, the request is considered “approved”. Below is a short review of how the approval process works.

Approvers and fulfillers are defined in a “group”. Each group has members of users/fulfillers and approvers. Each group has specific “access” allowing members to view, edit or approve requests. For example, Group1 can access General & BOA requests. Group2 can only access BOA, but *not* General Requests. Below is a set of 3 approval sessions for Contracts record LMC0001216.

The list below is sorted by the **Updated** field to group the records by time. When requests are submitted, the system work flow triggers an approval process, the first Group, identified by (Red Tag below). Members are notified of the request and a pending approval. ● Approved Once “approved” the system updates the approval process state with a notation for the approver and “No

Longer Required” state for the remaining members of the group. Notice the group numbers ending in 10266, below in the Red Tag.

Approvers New Edit... Search Updated ▾ Search

Approval for = LMC0001242

Group	Updated ▲	State	Approver
GAPRV0010266	06/09 04:53:26 PM	No Longer Required	Shawn Saucier
GAPRV0010266	06/09 04:53:26 PM	Approved	Ernesto DeLuna
GAPRV0010266	06/09 04:53:27 PM	No Longer Required	Lesley Smith
GAPRV0010266	06/09 04:53:27 PM	No Longer Required	Hye Shim
GAPRV0010266	06/09 04:53:27 PM	No Longer Required	Brandon DeBlaw
GAPRV0010266	06/09 04:53:27 PM	No Longer Required	Ben Gonzalez
GAPRV0010266	06/09 04:53:27 PM	No Longer Required	Blaine Keener
GAPRV0010266	06/09 04:53:27 PM	No Longer Required	Daniel Gachucho
GAPRV0010266	06/09 04:53:27 PM	No Longer Required	Hye Jung Shim
GAPRV0010266	06/09 04:53:27 PM	No Longer Required	Mario Berry
GAPRV0010266	06/09 04:53:27 PM	No Longer Required	Rene Enriquez

Fig. B-12

The request now goes to the 2nd set of approvers (Fig. B-13), the Blue Tag. The approval process is repeated again. Notice the group numbers ending in 10267.

GAPRV0010267	06/09 04:53:33 PM	No Longer Required	Diedra Shaw
GAPRV0010267	06/09 04:53:33 PM	No Longer Required	Hao Le
GAPRV0010267	06/09 04:53:33 PM	No Longer Required	Timothy Stewart
GAPRV0010267	06/09 04:53:33 PM	No Longer Required	Daniel Gachucho
GAPRV0010267	06/09 04:53:33 PM	No Longer Required	Ben Gonzalez
GAPRV0010267	06/09 04:53:33 PM	Approved	Ernesto DeLuna
GAPRV0010267	06/09 04:53:33 PM	No Longer Required	Deborah Guy
GAPRV0010267	06/09 04:53:33 PM	No Longer Required	Ashlianne Cosby
GAPRV0010267	06/09 04:53:33 PM	No Longer Required	Countess Dudley

Fig. B-13

The 3rd round of approvers in group ending in 10268, (Fig. B-14) Green Tag, repeat the process.

	GAPRV0010268	06/09 04:53:39 PM	● Approved	Ernesto DeLuna
	GAPRV0010268	06/09 04:53:40 PM	● No Longer Required	Thomas Britt
	GAPRV0010268	06/09 04:53:40 PM	● No Longer Required	Daniel Gachuche
	GAPRV0010268	06/09 04:53:40 PM	● No Longer Required	Sceffers Ward
	GAPRV0010268	06/09 04:53:40 PM	● No Longer Required	Ben Gonzalez
	GAPRV0010268	06/09 04:53:40 PM	● No Longer Required	Gregory Williams
	GAPRV0010268	06/09 04:53:40 PM	● No Longer Required	Felicia Garrett

Fig. B-14

At this point, the approval process for this record is incomplete. Depending on the request workflow, there can be several group approvals still pending; requiring information/required documentation, etc. before the record reaches the final approval. The record can also be rejected at any time during the process, permanently closing the record.

The screenshot Fig. B-15, shows the record state is “Waiting For Task Completion from OIC”, see the Red Tag below.

Number	<input type="text" value="LMC0001216"/>		Type	<input type="text" value="Contracts Request"/>
Requested By	<input type="text" value="Gregory Williams"/>		Requested for	<input type="text" value="Gregory Williams"/>
Created (MM/dd/yyyy hh:mm:ss a)	<input type="text" value="06/08/2020 04:08:25 PM"/>		Priority (?)	<input type="text" value="4 - Low"/>
Assignment group	<input type="text" value="TSU Office of General Counsel"/>		State (?)	<input type="text" value="Waiting For Task Completion From (OIC)"/>
Assigned to (?)	<input type="text"/>			

Fig. B-15

This record requires additional approval(s).