TEXAS SOUTHERN UNIVERSITY

ServiceNow
Legal Management System (LMS)
for
Legal Matter Contracts
(LMC)

User Guide

Precision Task Group
9801 Westheimer, Suite 803
Houston, TX 77042
Phone: 713-781-7481
www.ptg.com

PTG Precision TASK GROUP

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Introduction

This guide provides a general overview of instruction, functionality, and workflow demonstrations of the TSU ServiceNow - Legal Matter Contracts (LMC) application. The Legal Management System (LMS) is a cloud-based application providing access to five (5) categories available on the TSU ServiceNow portal. Users can submit requests after providing requisite information into the data fields. Required data entry rules apply to values entered on any category request for successful submission. The category request types are:

- *Contract Request:*
  - Submit this form to request a review, approval, and/or creation of a legal contract.

- *General Request:*
  - Submit this form for the following: (i) Legal Question (Formal Legal Opinion), (ii) MAPP (Policy & Procedure), and/or (iii) Served with lawsuit/administrative matter. It does not include a submission for a contract, Board of Regents agenda, grants, or records.

- *Grant Request:*
  - Submit this form to request legal documentation as part of a grant including contracts.

- *Records Request:*
  - Submit this form to request or forward a request for University public records.

- *Board of Regents Agenda:*
  - Submit this form to present an agenda item to the Board of Regents for approval or information.

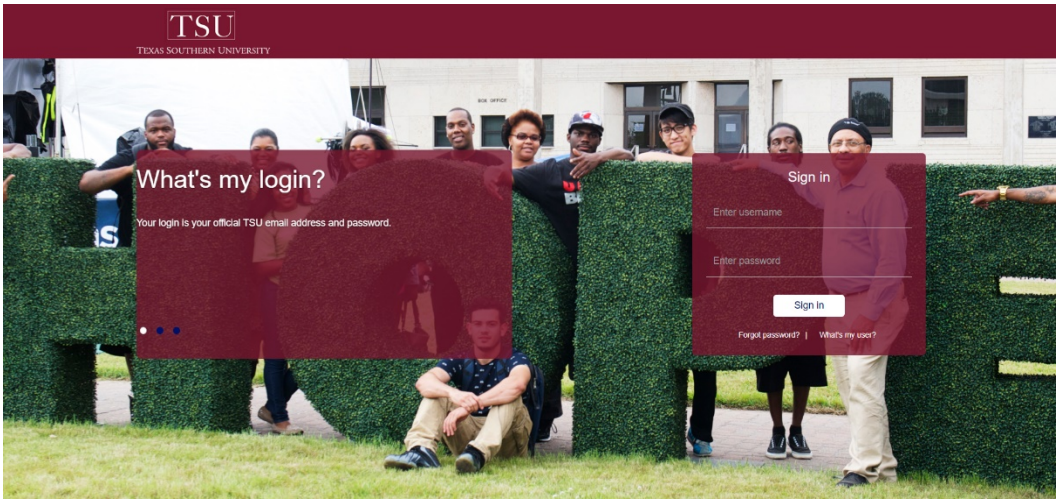
Requests are processed internally by application administrators and University management. This guide focuses on the ***Contracts*** category, but can be used for the other four (4) categories, since the commands and process flows are close in comparison.

The Legal Management System application utilizes three types of staff and security levels: (i) ***Users****,* (ii) ***Fulfillers,*** *and* (iii) ***Approvers,*** all internal to TSU. Users create and submit "requests", Fulfillers "administer" process requests, and Approvers are the governance groups to review, reject or approve requests.

The TSU ServiceNow Portal, LMS & LMC Intake Form

Portal Access:

The Legal Management System application resides on the TSU ServiceNow Portal; access requires a TSU ServiceNow **ID** (your e-mail) and **password** (your current TSU password). Below is the TSU Service Portal login page.



After log in, Users are directed to the portal main menu (Fig A-1). The page focus is the "*Request Something*" icon (red tag). User selects it to open the Legal Management System application categories landing page (Fig A.2).

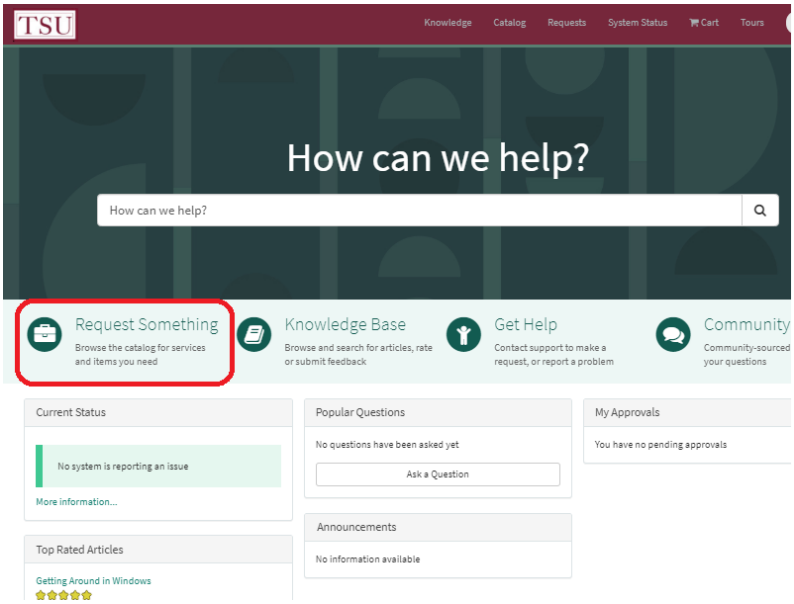


Fig. A-1

LMC Categories Landing Page:

There are five (5) categories on the Legal Management System landing, each providing general description of services and intake form guidelines for submitting such a request. The "Categories" Landing Page (Fig. A-2):

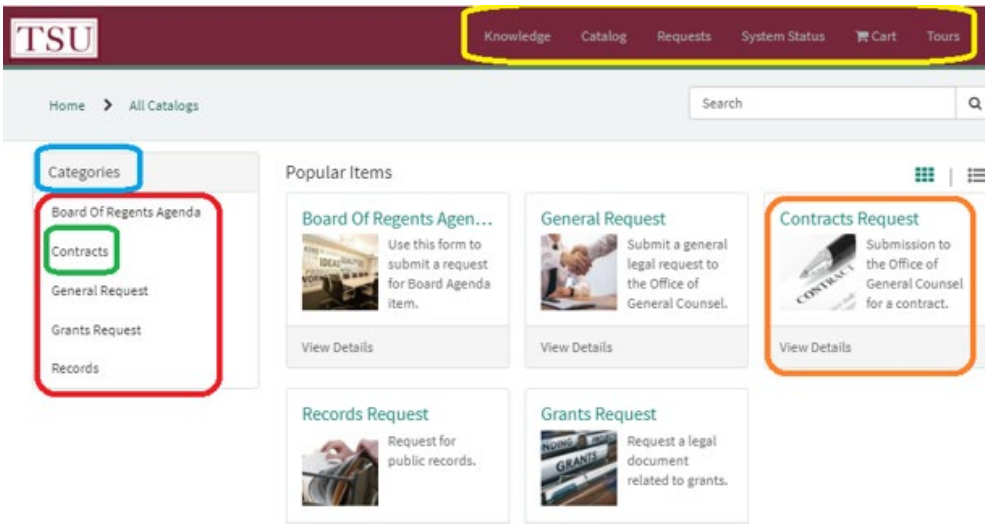


Fig. A-2

- Yellow Tag – Landing page Menu bar.
- Blue Tag -- "Categories" header label.
- Red Tag -- List of Legal categories. Each category is a link to the specific program.
- Green Tag -- Select "Contracts" to open the "Contracts" ***landing*** **page. Fig. A-3**.
- Orange Tag -- Select "Contracts", to open the "Contracts" ***intake*** **form. Fig. A-4.**

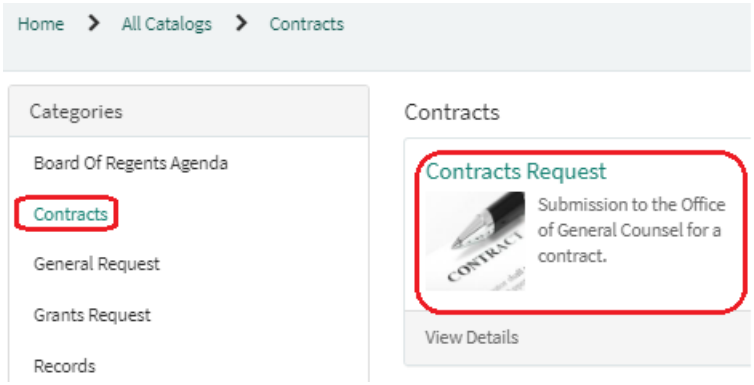


Fig. A-3

Contracts Intake Form:

Below is a partial (top section) image of "Contracts" Intake form landing page (Fig. A-4):

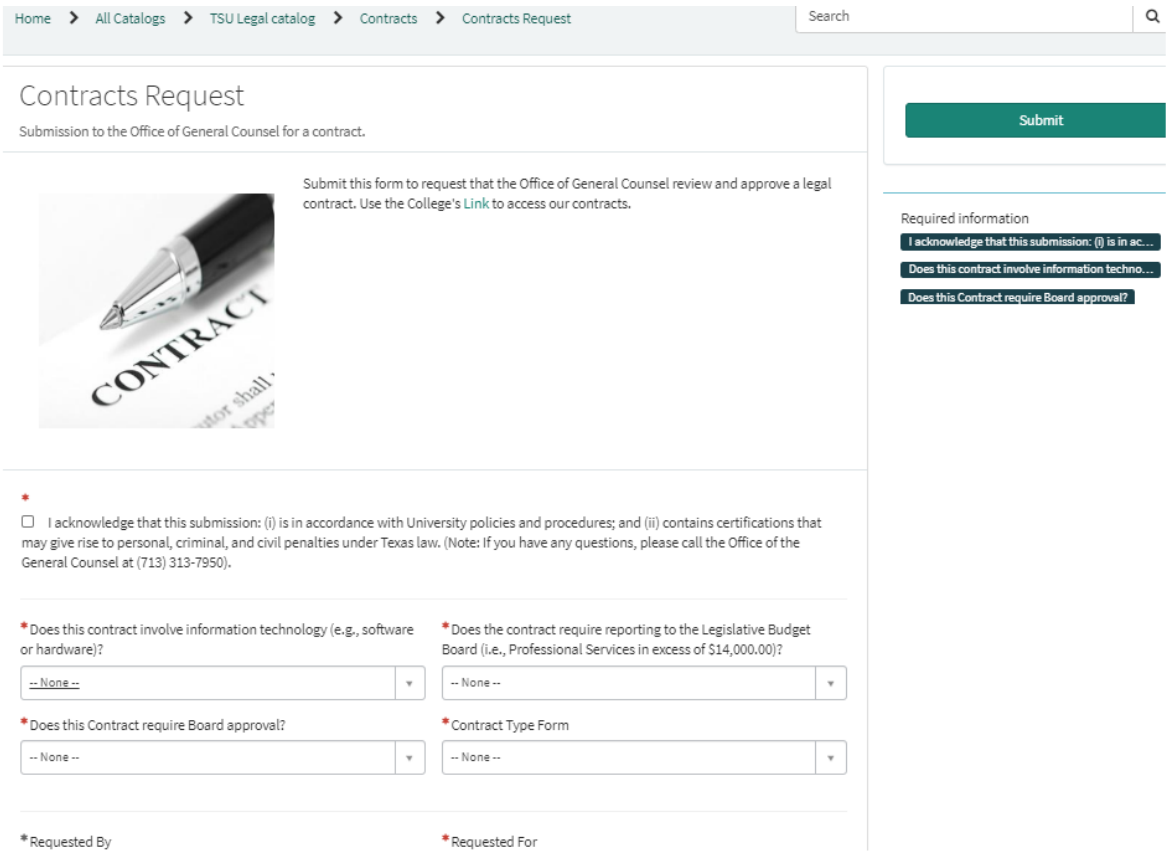


Fig. A-4

Note: *Fields marked with a red asterisk * are required and must be provided to successfully submit the request. After all values are entered, select* ***Submit****. Form validation process executes every time Submit is selected; errors will display for corrections. The process repeats until the form is error free at which time the request will be successfully submitted.*

Important: *Exiting or reloading the request form, complete or incomplete, will result in the loss of all data entered. The User must re-enter all values to submit a request.*

The screen image example below (Fig. A-5) displays a partial top section of the Contracts landing page. The color tags describe input field data types and meanings.

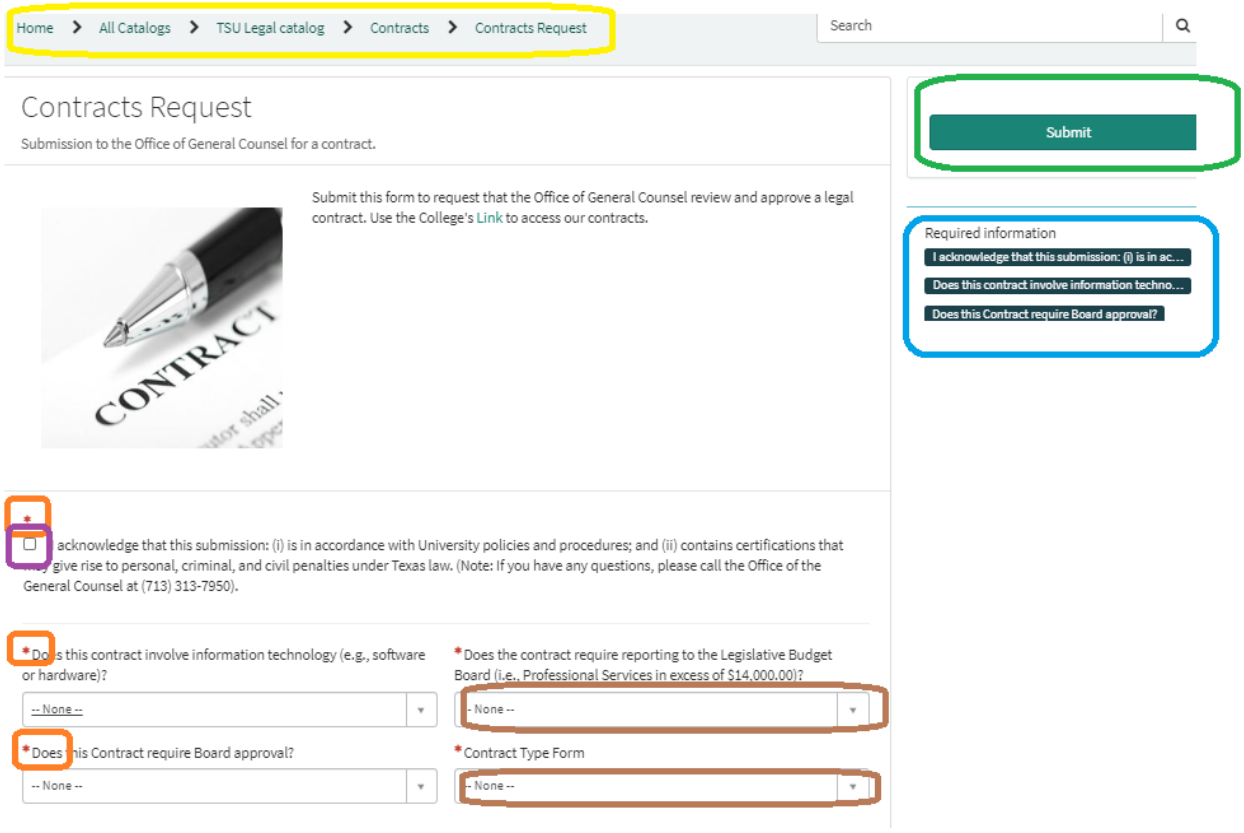


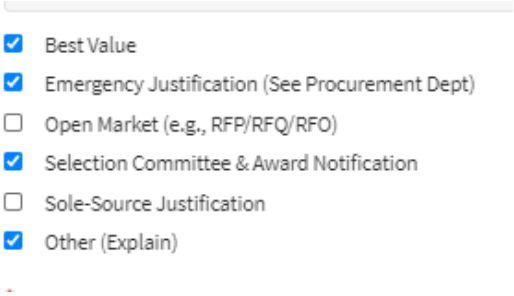
Fig. A-5

- Yellow Tag – The path of the user current location in the application.
- Purple Tag -- Required checkbox.
- Orange Tag -- Fields marked with * are required to submit the form.
- Green Tag -- Submit button.
- Brown Tag -- Drop-down selection, must select a value from the list. Field is initialized with “None“.

Intake form field types:

Examples of primary input fields types for intake forms:

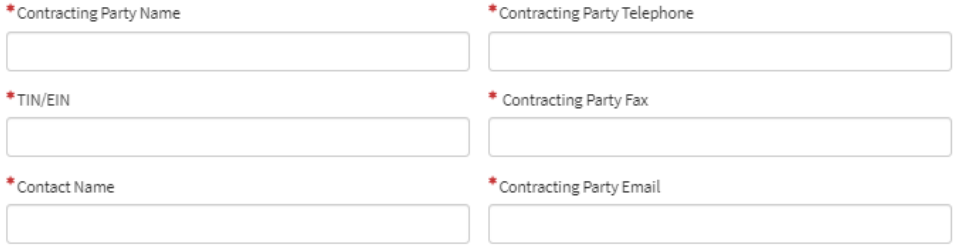
- Check boxes: check one or many, depends on the question.



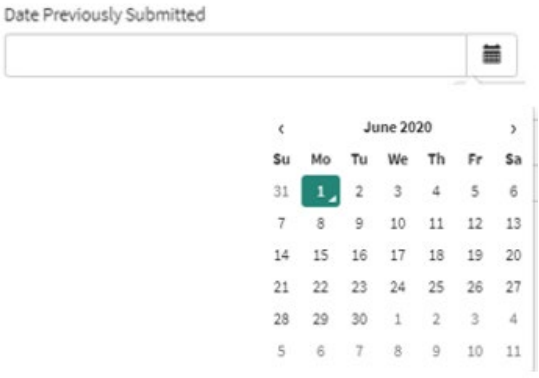
- Non-editable fields:



- Free form text – user can input values without restrictions, unless otherwise noted. Example, a monetary field may only allow numbers with two decimal places.



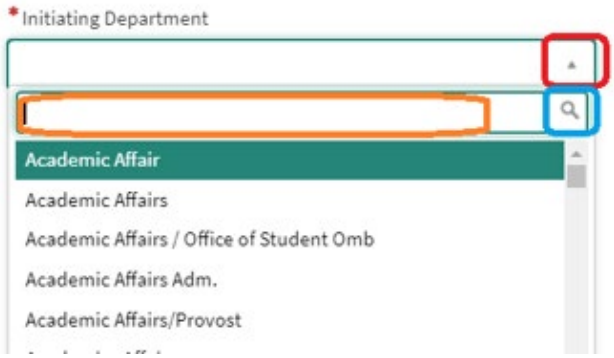
- Select a Date – Click the calendar icon, click the date of choice and it is placed in the value box.



- Drop-down (choice) – mutually exclusive choice of one value from a **short** drop-down list. Click the inverted triangle (red tag); the choice of values are made available.



Drop-down (Reference) – mutually exclusive choice of one value from a **long** drop-down list. Click the inverted triangle (red tag); the choice of values are made available. Enter a search value (blue tag) in the box (orange tag) to find a value in the list. The user can use the * wild-card to search for values. Example: *Bak or bak*. When nothing is found, a message "No matches found" is returned.



Conditional questions will display new input fields/questions based on the response of the current question. Figure A-7 shows the question: "*Does this Contract require Board approval?*", followed by a small gap area (red tag) then the "Requested By" box field.

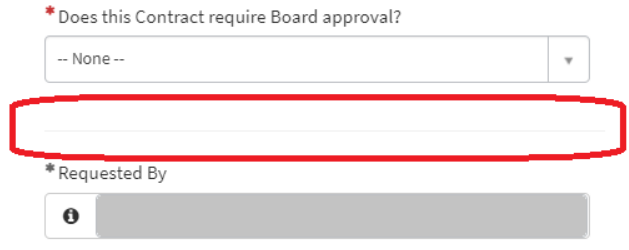


Fig. A-7

Selecting "YES" in the drop-down box for question "*Does this Contract require Board approval?"* triggers a new question: "*Have you Submitted Board Agenda Request*?" (Fig. A-8) to appear. If the response had been "No", in this case, no new question would have appeared.

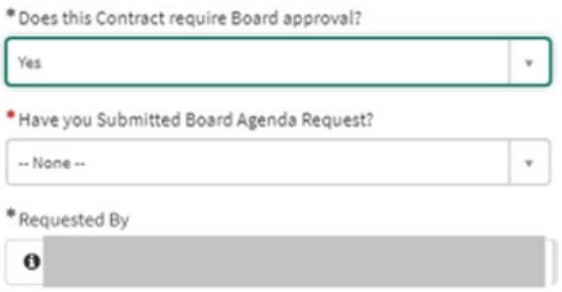


Fig. A-8

Fields displaying the icon, contain additional instruction for the specific question, (Fig. A-9). Clicking on this icon will toggle the question to appear and hide. Click "**x**", (Lime Tag) to close help text dialogue.

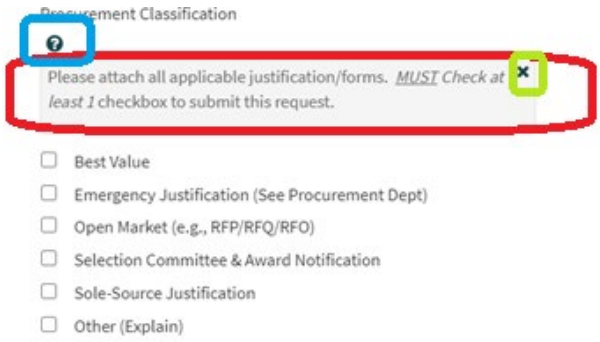


Fig. A-9

- Blue Tag – Click icon to get help text.
- Red Tag – Help text.
- Lime Tag – Click "**x**" to close the help text dialogue.

At the bottom of every intake form is a paper clip icon labeled "Add attachments".

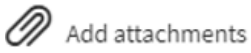
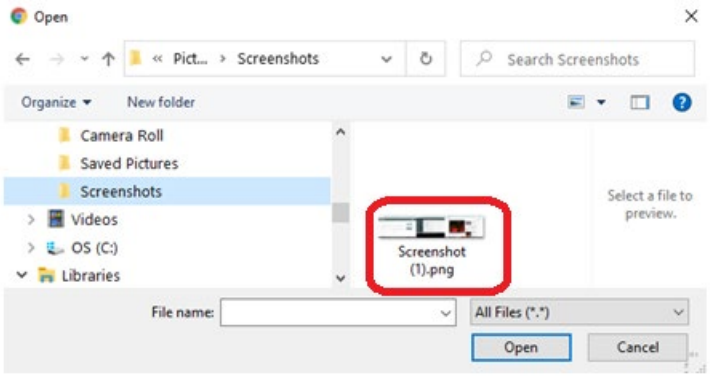
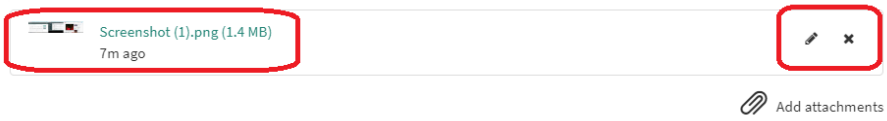


Fig. A-10

- Click the icon, a directory window opens of files on the HD of the computer, find the location of the file and double click it to upload (red tag). See below:



- The file is uploaded and displayed on the intake form:



- The **pencil** icon will allow editing of the file name
- The **x** icon will delete the file LMS Application – Fulfiller Processing