ITS Telecommunications

Using START to Add, Change, or Delete Telephone Services Requests

Training Manual

2-04

Table of Contents

Learning Objectives

After completing this course, you will be able to:

- Log in to the Systems & Technology Access Request Tool (**START**)
- Understand the components of the Main Menu and Dashboard within **START**
- Query for end users and building names/addresses within **START**
- Effectively navigate through the Main Menu, Dashboard, and request screens
- Add, change, and/or delete telephone services requests using **START**
- Approve, reject, or cancel telephone services requests made through **START (only Telecommunications Approvers)**
- Review requests made through **START**
- Exit **START**

Introduction

This training guide is designed to provide the end user with specific guidelines regarding the utilization of **START** (Systems & Technology Access Request Tool) for the purpose of requesting telephone services. This web tool will allow the end user to:

- Make requests for telephone services for Self, Others, or Departments
- Monitor the status of requests made for telephone services
- Provide uniformity to the format of requests for services
- Validate PTAEOs as well as building locations
- Ensure pertinent information is provided when requesting services

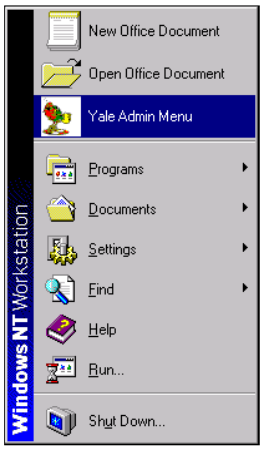
START (Systems & Technology Access Request Tool)

Introduction

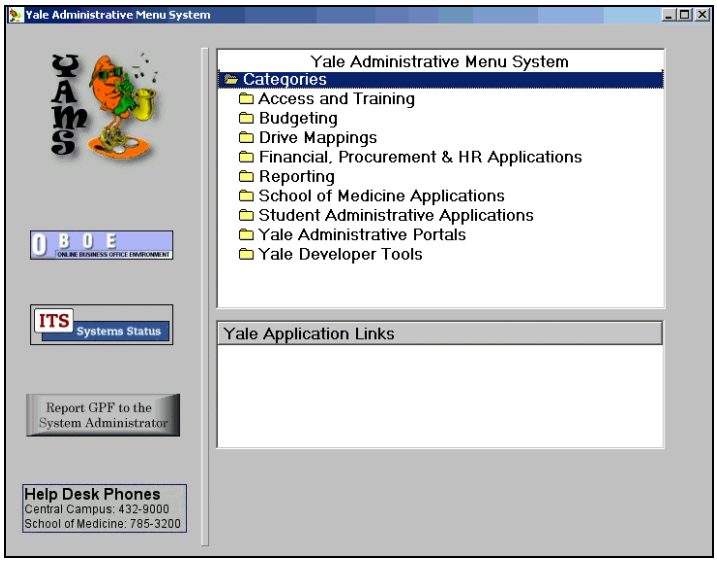
START is the new web based tool that end users use for requesting, changing or removing access to Yale's applications and ITS services. By utilizing **START**, processing time is reduced as well as the complexity and requirements for these requests. This document has been designed to provide an overview of the tool, specifically the functionality of **START** as it relates to telephone services requests.

Accessing START

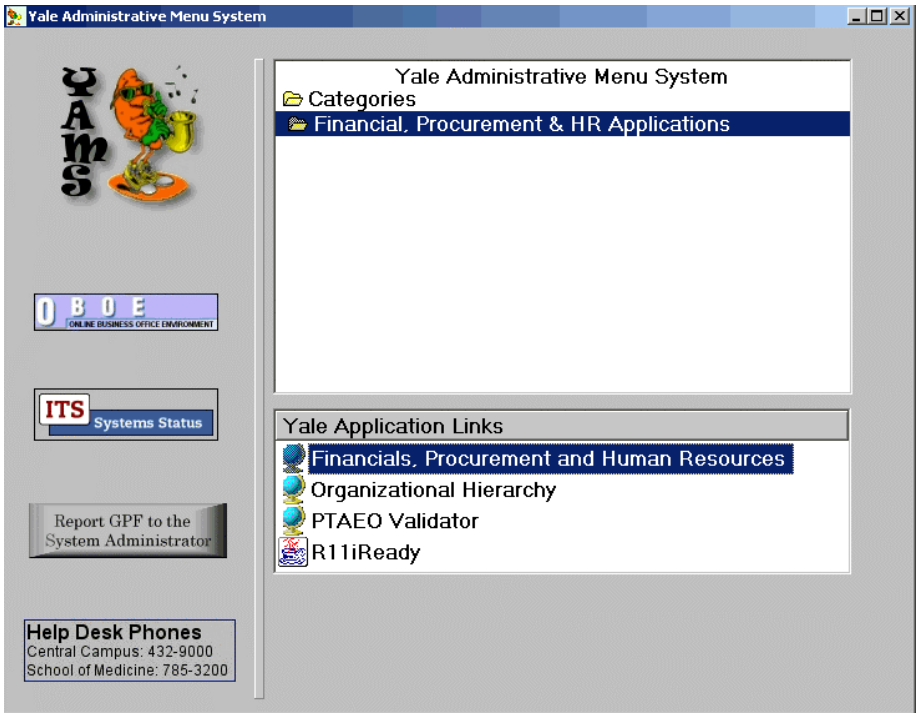
End users may access **START** in one of two ways. First, they may access **START** through **CAS** (Central Authentication System). **(Note: This is the preferred method.)** Or, second, they may select **S.T.A.R.T.** from the ITS Administrative Systems web site at www.yale.edu/access. To access **START** through **CAS**, select the **Start** button on the Task bar of your desktop window. Click on **Yale Admin Menu**.



The **YAMS** (Yale Administrative Menu System) window will display. Click the **Financial, Procurement & HR Applications** folder.

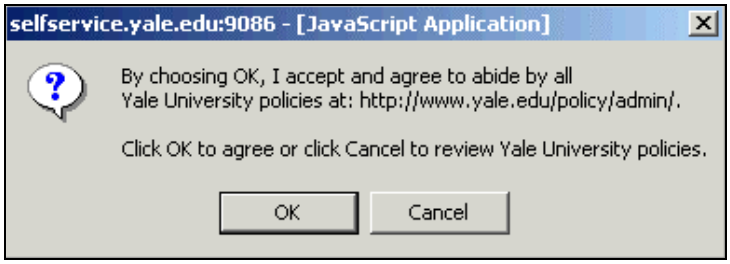


In the **Yale Application Links** window, double-click on the **Financials, Procurement and Human Resources** icon to access **CAS** (**Central Authentication Service**).

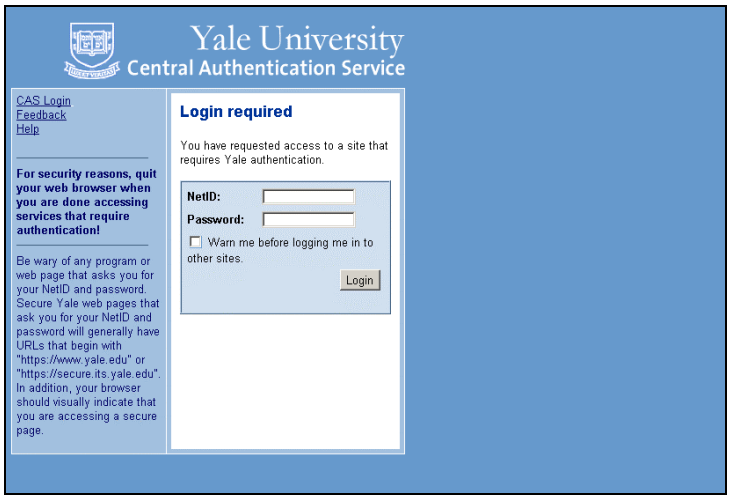


Logging on to START

Once the user double-clicks on **Financials, Procurement and Human Resources** in the Yale Application Links window, a **University Authorized User Agreement** message box displays. By clicking on the **OK** button you agree to the terms in the message box. If the user selects **Cancel**, the user will be linked to the policies located at http://www.yale.edu/policy/admin/.

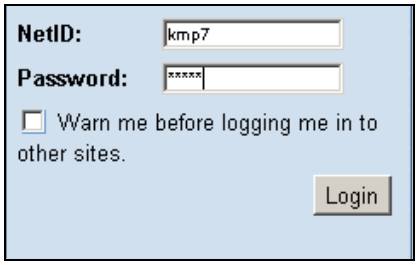


After clicking **OK**, **CAS** (**Central Authentication Service**) will display as seen below.

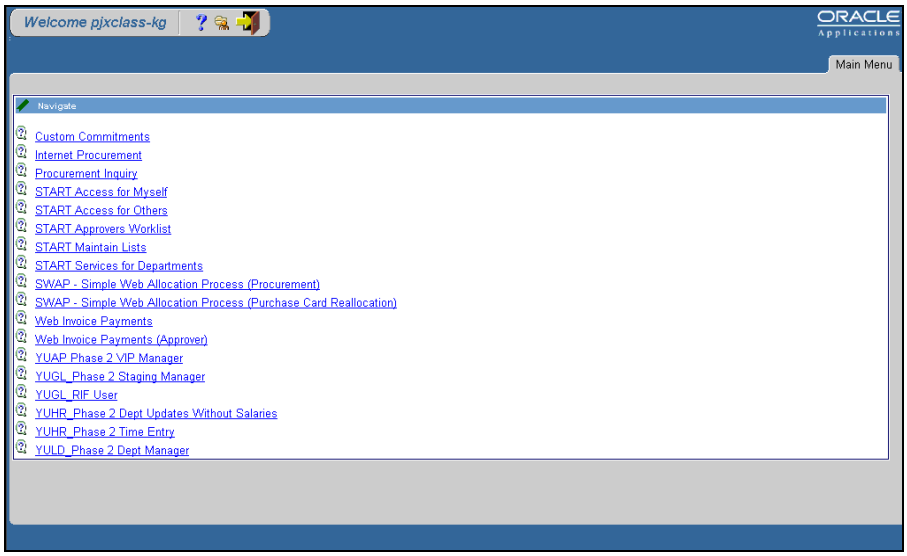


To log on/access START, take the following steps:

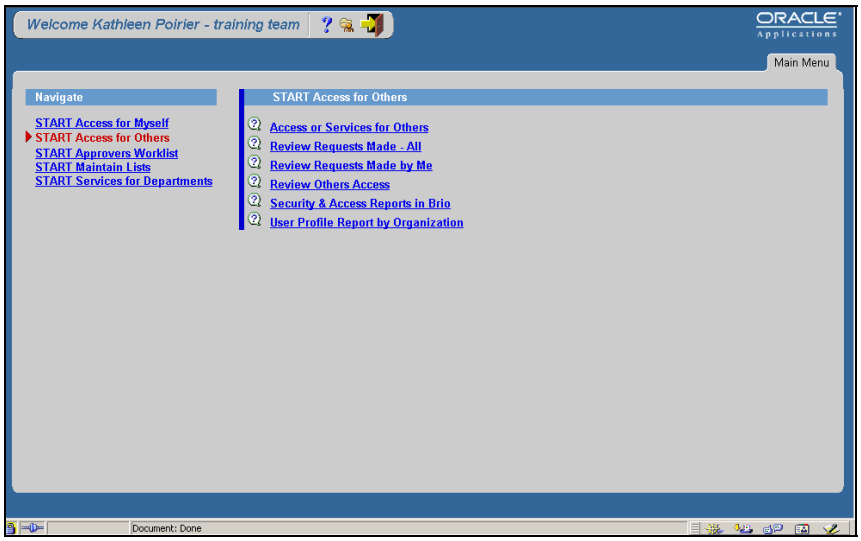
1. Log on to identify yourself as a user. The user name identifies each user to the system. It is used to establish levels of responsibility for entering, viewing and modifying data.
2. Complete the **NetID** field with your NetID.
3. Enter your **Password**. Central Campus users should use their email password to log on. Medical School users should use their NT or "Good Morning" password.



4. Click the **Login** button. The **Welcome Menu** window will display as shown below. Your self-service and core applications may vary slightly compared to the list seen below.

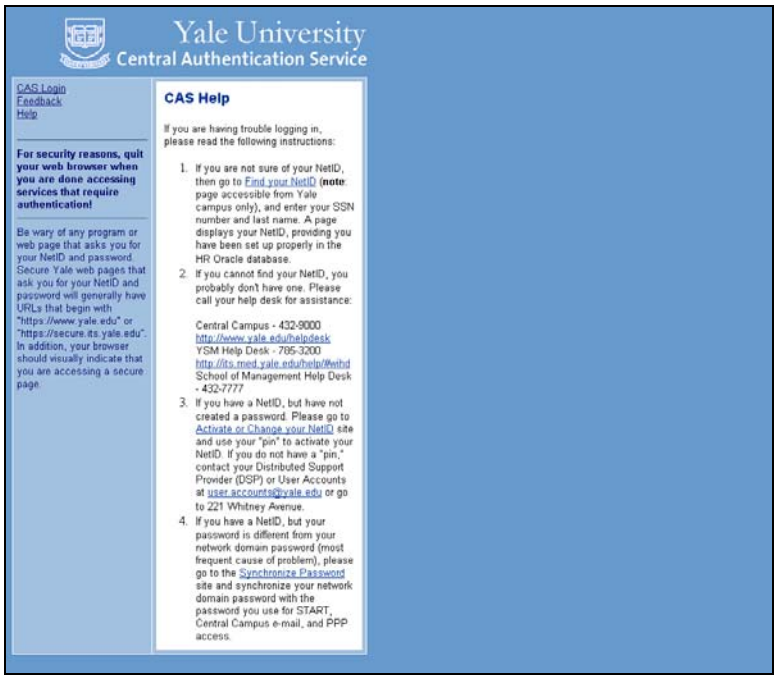


5. Within the **Welcome Menu Navigate** list, select **START Access for Others**. This action will open a parallel listing from which the user chooses to either request access or services, review requests made, review access for others, or run either the Security & Access Reports in Brio or the User Profile by Organization.



If the user is experiencing a problem when logging on, select **Help** from the **CAS** log on screen.

It will link the user to **CAS Help** as seen below.



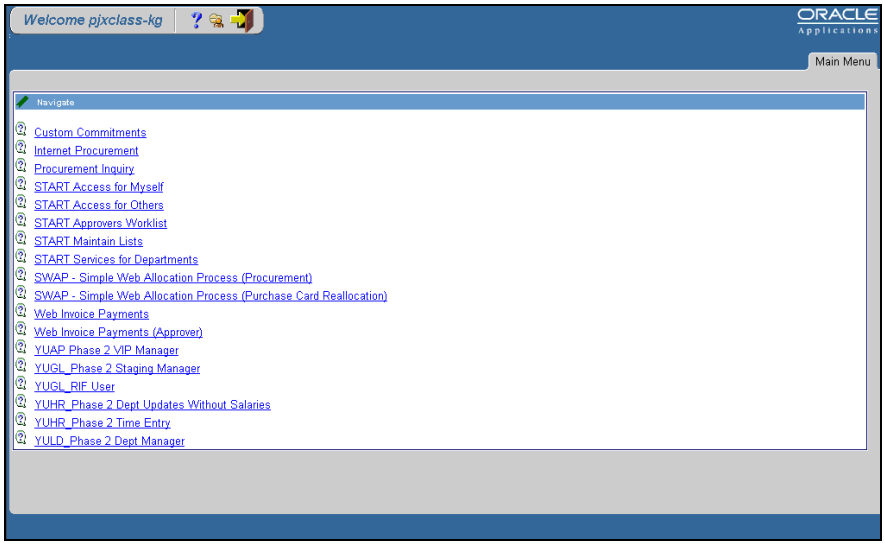
The table below offers troubleshooting suggestions that may be selected from **CAS Help**.

If…	Then…
you are not sure of your NetID	Go to the **Find NetID** link and enter your SSN number and last name. A page displays your NetID provided you have been set up properly in the Human Resources Oracle database.
you cannot find your NetID	You probably do not have one. Please call your help desk for assistance:

	Central Campus - 432-9000 http://www.yale.edu/helpdesk YSM Help Desk - 785-3200 http://its.med.yale.edu/help/#wihd School of Management Help Desk - 432-7777
you have a NetID, but have not created a password	Go to the **Activate or Change Your NetID** site and use your "pin" to activate your NetID. If you do not have a "pin", contact your Distributed Support Provider (DSP) or User Accounts at user.accounts@yale.edu or go to User Accounts at 221 Whitney Ave, 1st floor.
you have a NetID, but your password is different from your network domain password (most frequent cause of problem)	Go to the **Synchronize Password** site and synchronize your network domain password with the password you use for **START**, Central Campus email, and PPP access.

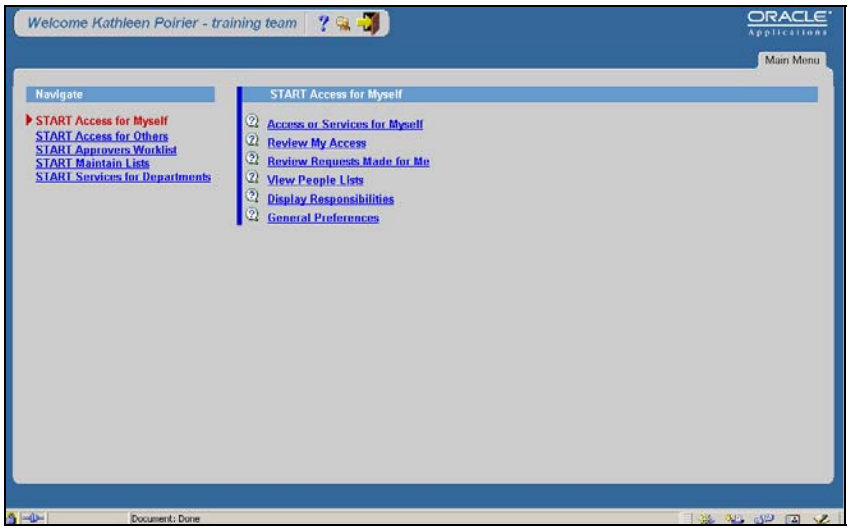
Welcome Menu

After logging on to **START**, the **Welcome Menu** will display. The end user's **Welcome Menu** may vary slightly compared to the menu shown below.



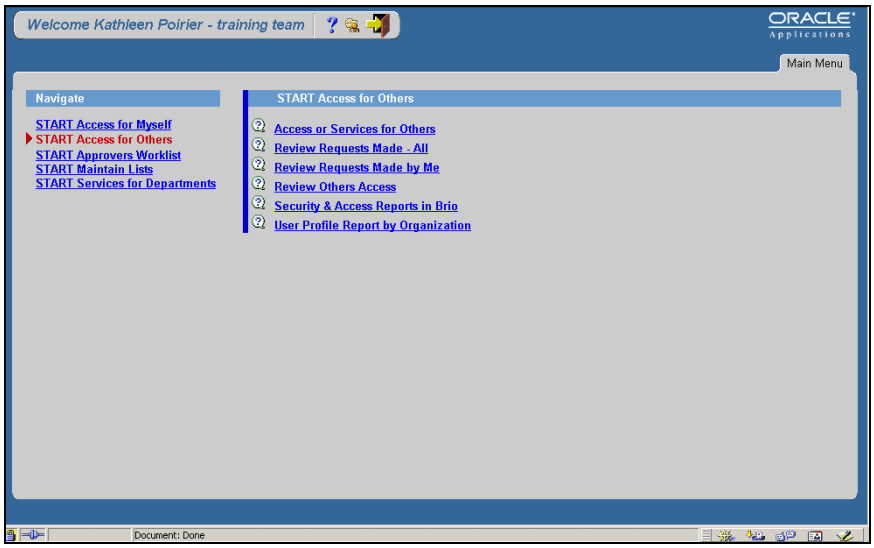
Parallel Menus

Start Access for Myself



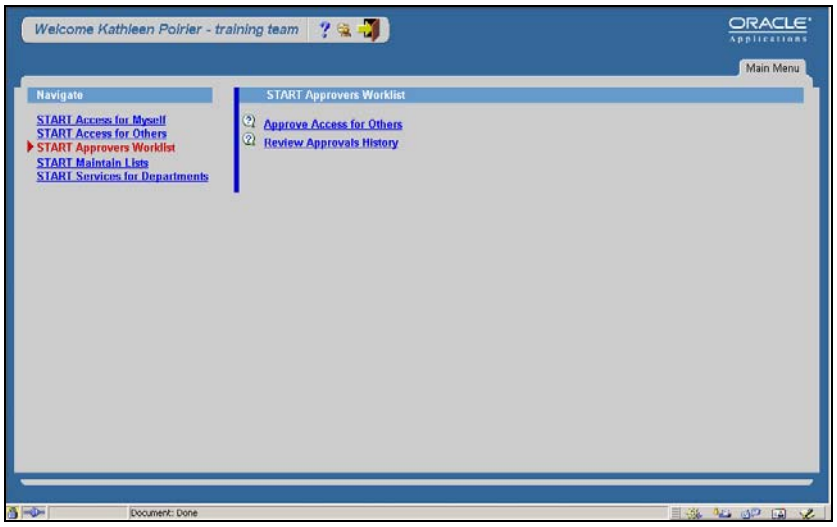
START Access for Myself	Descriptions
Access or Services for Myself	This selection is used to request access or services for oneself.
Review My Access	This selection allows the end user to view his/her own User Account Profile.
Review Requests Made for Me	This selection allows the end user to view the status of any access/services request made for self.
View People Lists	This selection allows the end user to view the various People Lists contained in **START**; i.e., **View Business Managers and Administrative Contacts**, **View Distributed Support Providers**, **View ITS Approvers**, **View Expert Users**, **View Other Trusted Persons**, **View Training and Access Coordinators**, **View Process Owners**, **View HRIS Support Business Manager Maintainers**, **View HR Salary Approvers**, **View Telecommunications Coordinators, View Telecommunication Approvers**.
Display Responsibilities	This selection links the end user to the **Non-Technical Descriptions for Responsibilities** spreadsheet. Information contained in this spreadsheet includes information pertaining to Responsibility Names, Non-Technical Descriptions of the Responsibilities, whether the responsibilities are Central/Distributed, what responsibilities require process owner authorization, names of the authorizers, whether training is required, etc.
General Preferences	This selection allows the end user to change the display name on the **Welcome Menu**.

START Access for Others



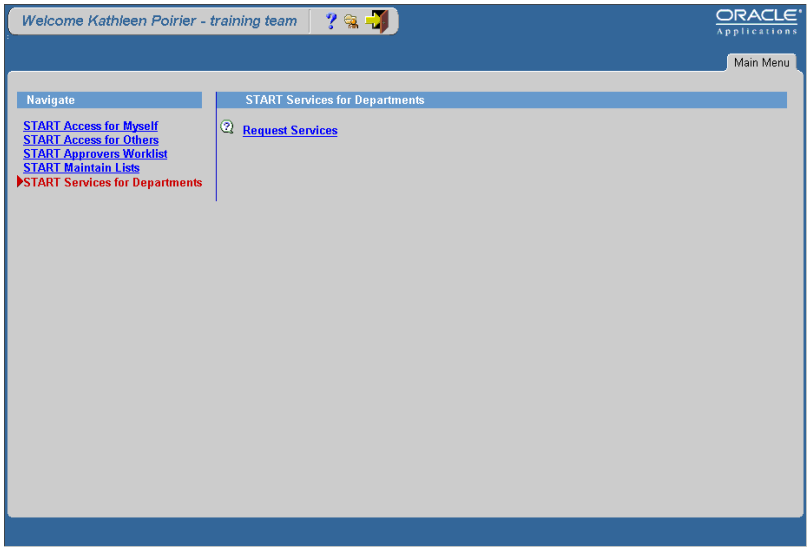
START Access for Others	Descriptions
Access or Services for Others	This selection is used by Business Managers, Distributed Support Providers (DSPs), ITS Approvers, Telecommunication Coordinators and Training and Access Coordinators (TACs) to request access/services for other end users.
Review Requests Made - All	This selection allows Business Managers, Distributed Support Providers (DSPs), ITS Approvers, Telecommunication Coordinators and Training and Access Coordinators to view the status of any access requests made based on a specific date range by self or others.
Review Requests Made by Me	This selection allows Business Managers, Distributed Support Providers (DSPs), ITS Approvers, Telecommunication Coordinators and Training and Access Coordinators to view the status of any access requests made by them.
Review Others Access	This selection allows Business Managers, Distributed Support Providers (DSPs), ITS Approvers, Telecommunication Coordinators and Training and Access Coordinators to view other end users' User Account Profile.
Security & Access Reports in Brio	This selection links Business Managers/TACs to the nine distributed security and access reports used to determine that access to the applications is correct. They should be run periodically (weekly or monthly) to review access and ensure its appropriateness.
User Profile Report by Organization	This selection allows Business Managers/TACs to query by organization name/unit code for a list of all active users in the selected organization in order to view the User Access Profile report for any individual in the organization.

START Approvers Worklist



START Approvers Worklist	Descriptions
Approve Access for Others	This selection allows Business Managers/Approvers access to requests made that need to be approved, rejected, or canceled by them.
Review Approvals History	This selection allows Business Managers/Approvers to view the history of requests made for access.

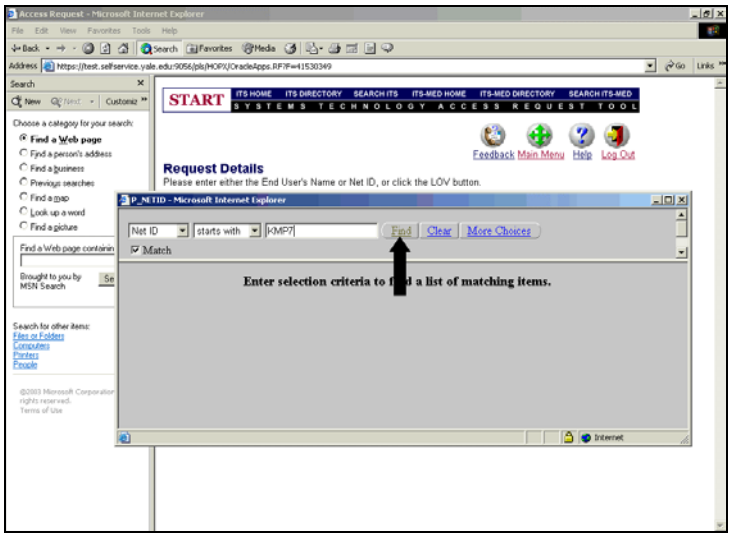
START Services for Departments



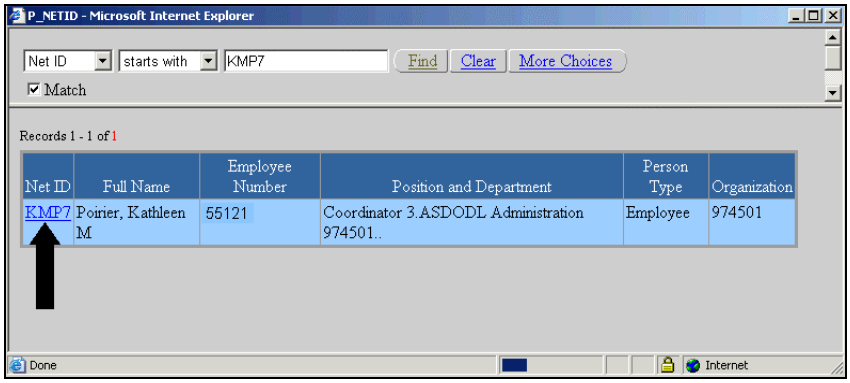
START Services for Departments	Description
Request Services	This selection allows Business Managers, DSPs, ITS Approvers, and Telecommunications Coordinators to request services for departments; i.e., **Central Campus Backup/ADSM/TSM**, **Central Campus Meeting Maker**, **Ethernet Connection**, **Telephone Services**.

Requesting Access/Services for Others or Departments

An end user will either be requesting access, for himself/herself, others, or departments to one of the ITS applications or services that are handled by **START**. The request may be to add, change or delete responsibilities to the Oracle business applications and/or Telephone Services or, for Central Campus users: AccuShip, e-mail accounts, back up/ADSM/TSM, Meeting Maker, NetID Pins, Remote Access/PPP, Ethernet Connections, or IP Addresses (DSPs only). When **Request Access for Others** is selected, a **List of Values** window will display as seen below.

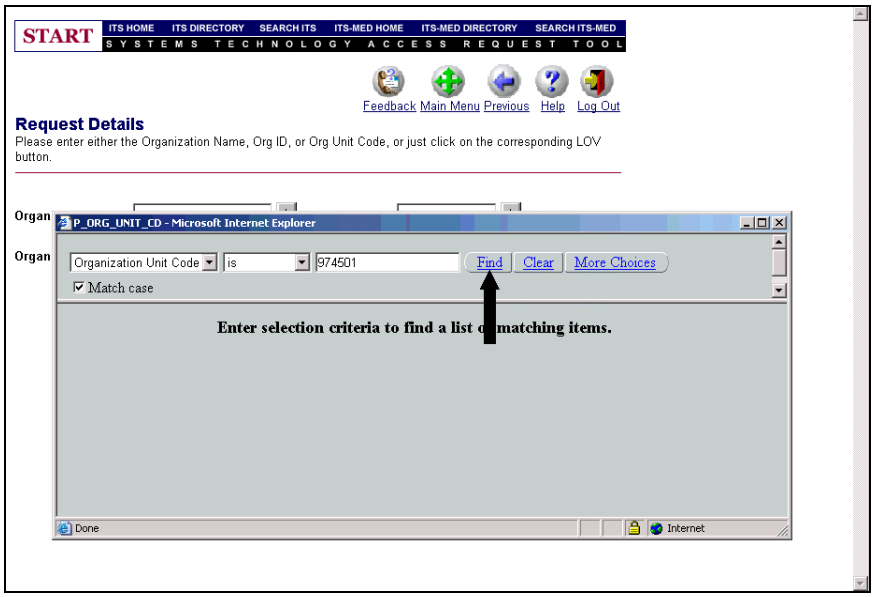


The end user may then query the employee by NetID if known. If the NetID is not known, the end user may select **Full Name** from the drop down list in the first box, **starts with** in the second box, and type the employee's last name in the third box. After the three fields have been completed, select the **Find** button. When searching by NetID, the employee's information will display in the field as seen below.

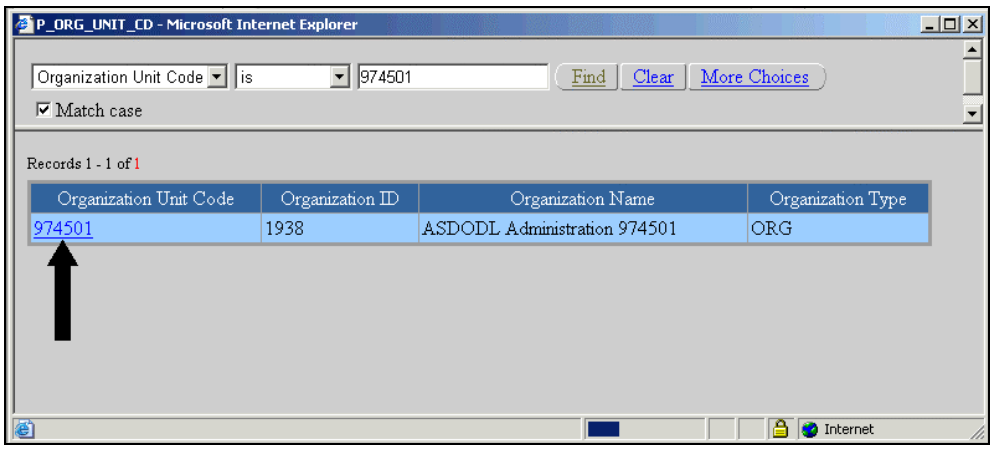


Note: The List of Values window will display an x-marked match case box. When searching for an ORG name or NetID, data should be entered in the appropriate upper or lower case. It is recommended that, when in doubt, enter data in upper case.

When **Request Services** is selected (department requests), a **List of Values** window will display as seen below.

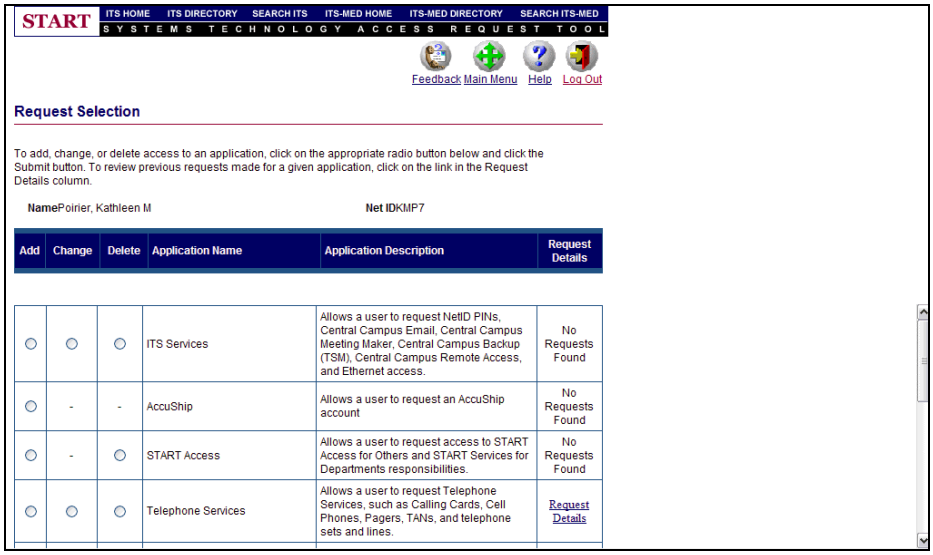


The end user may then query the department/organization by **Organization Unit Code** (Org Number) if known. If the **Organization Unit Code** is not known, the end user may select **Organization Name** from the drop down list in the first box, **contains** in the second box, and type the short org name (**ASDODL**) in the third box. After the three fields have been completed, select the **Find** button. When searching by **Organization Unit Code**, the organization's information will display as shown below.

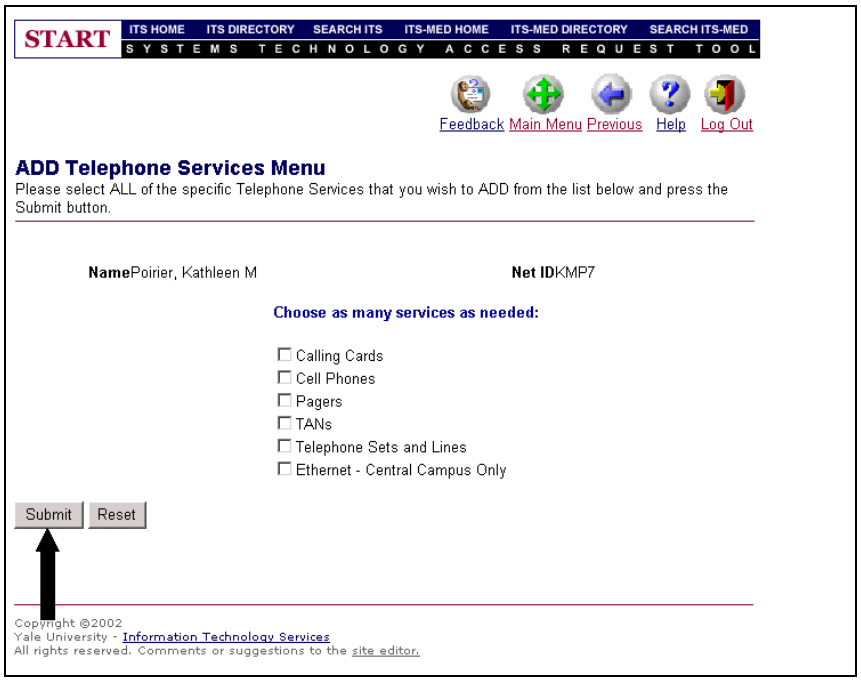


By selecting the highlighted NetID or Organization Name, the end user will be brought to the **Dashboard** where the requests to add, change or delete access and/or services are selected as seen below.

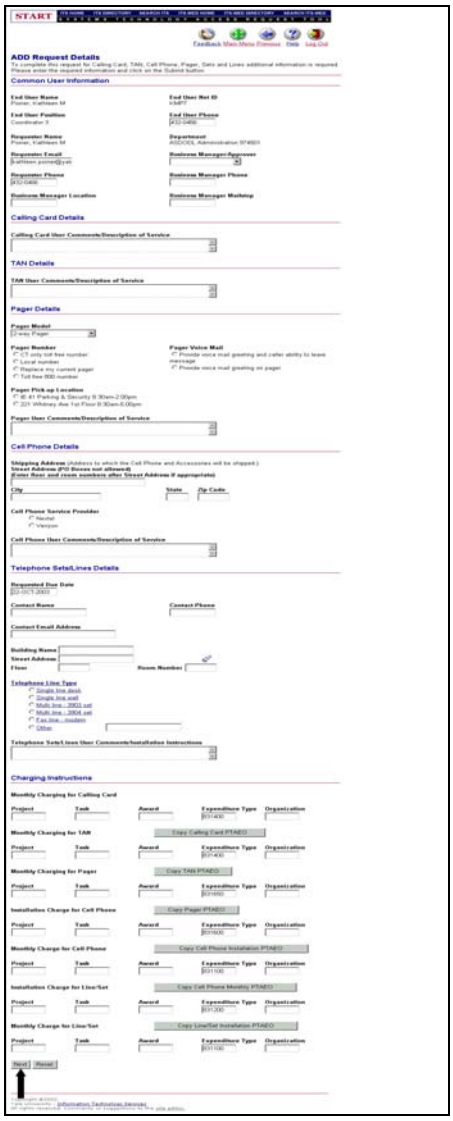
Dashboard



Once a radio button has been selected, the end user should scroll down to the **Submit** button that is located at the bottom of the **Dashboard** to continue the process. When requesting Telephone Services, if the **Add** button is selected, the end user will be linked directly to the **Add Telephone Services Menu**. If the **Change** button is selected, the end user will be linked directly to the **Change Telephone Services Menu**. If the **Delete** button is selected, the end user will be linked directly to the **Delete Telephone Services Menu**. The end user would then select the specific telephone service(s) as seen below.

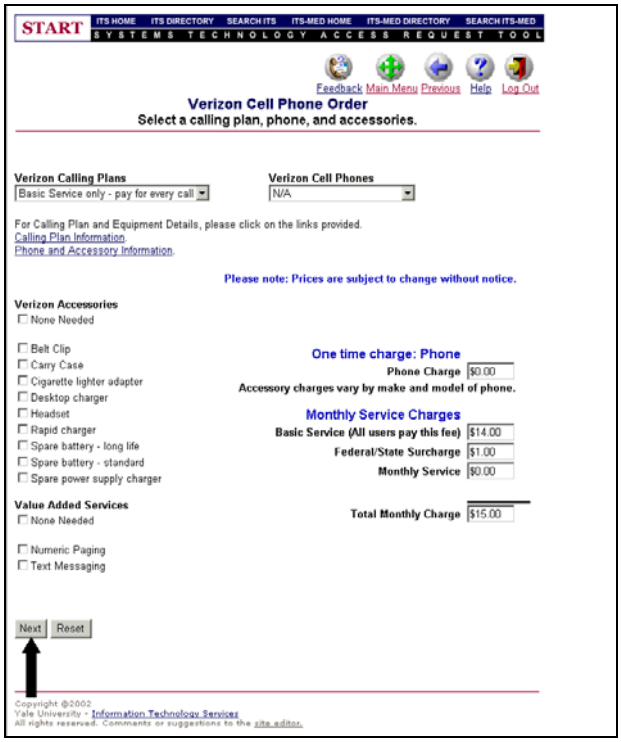


After submitting the request for services, the **ADD Request Details** screen will display. An example is seen below.

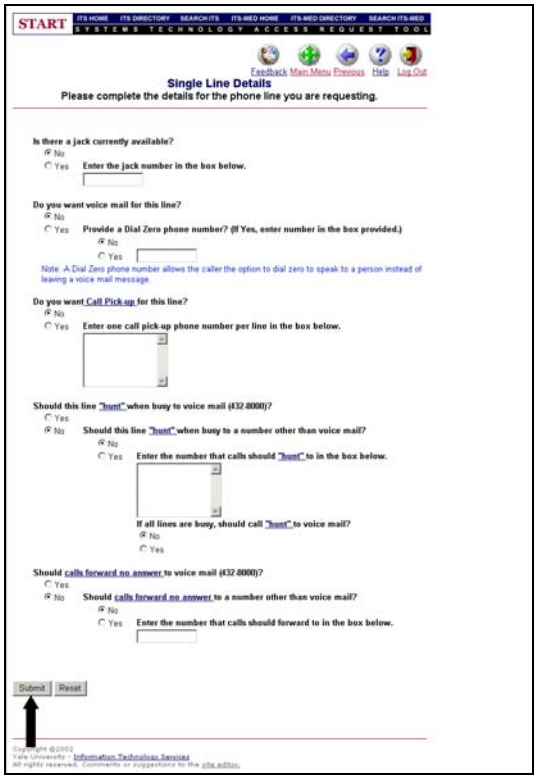


Common user information is entered only once and used for all the requests. Charging instructions for all services are requested at the end of the Details screen to allow the PTAO(s) to be copied, as applicable. After the information has been entered, the end user will click the **Next** button to continue the request process.

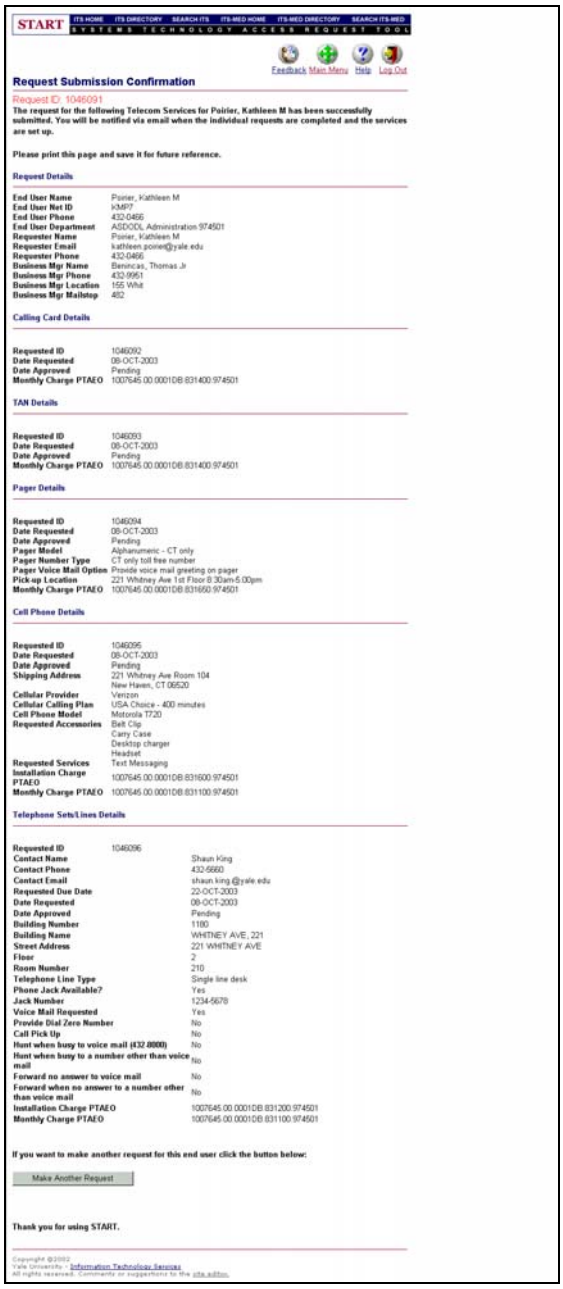
When requesting a cell phone, an order form specific to the phone service being ordered will display.



When requesting **Telephone Sets/Lines**, the **Line Details** screen will display. The end user will complete the details for the phone line and click the **Submit** button when done.



A **Request Submission Confirmation** page will display. A **Request ID** number will display for the entire request as well individual **Request ID** numbers for each individual request. This allows the end user to track the status of the entire request as well as the status of each individual request. The end user should print the **Request Submission Confirmation** page for future reference.



START ITS HOME ITS DIRECTORY SEARCH ITS ITS-MED HOME ITS-MED DIRECTORY SEARCH ITS-MED
SYSTEMS TECHNOLOGY ACCESS REQUEST TOOL

Feedback Main Menu Help Log Out

Request Submission Confirmation

Request ID: 1046091

The request for the following Telecom Services for Poirier, Kathleen M has been successfully submitted. You will be notified via email when the individual requests are completed and the services are set up.

Please print this page and save it for future reference.

Request Details

End User Name	Poirier, Kathleen M
End User Net ID	KMP67
End User Phone	432-0466
End User Department	ASDODL Administration 974501
Requester Name	Poirier, Kathleen M
Requester Email	kathleen.poirier@yale.edu
Requester Phone	432-0466
Business Mgr Name	Bennicas, Thomas Jr
Business Mgr Phone	432-9961
Business Mgr Location	155 Whit
Business Mgr Mailstop	482

Calling Card Details

Requested ID	1046092
Date Requested	08-OCT-2003
Date Approved	Pending
Monthly Charge PTAEO	1007645.00.0001DB.831400.974501

TAN Details

Requested ID	1046093
Date Requested	08-OCT-2003
Date Approved	Pending
Monthly Charge PTAEO	1007645.00.0001DB.831400.974501

Pager Details

Requested ID	1046094
Date Requested	08-OCT-2003
Date Approved	Pending
Pager Model	Alphanumeric - CT only
Pager Number Type	CT only toll free number
Pager Voice Mail Option	Provide voice mail greeting on pager
Pick-up Location	221 Whitney Ave 1st Floor 8:30am-5:00pm
Monthly Charge PTAEO	1007645.00.0001DB.831650.974501

Cell Phone Details

Requested ID	1046095
Date Requested	08-OCT-2003
Date Approved	Pending
Shipping Address	221 Whitney Ave Room 104 New Haven, CT 06520
Cellular Provider	Verizon
Cellular Calling Plan	USA Choice - 400 minutes
Cell Phone Model	Motorola T720
Requested Accessories	Belt Clip Carry Case Desktop charger Headset
Requested Services	Text Messaging
Installation Charge PTAEO	1007645.00.0001DB.831600.974501
Monthly Charge PTAEO	1007645.00.0001DB.831100.974501

Telephone Sets/Lines Details

Requested ID	1046096
Contact Name	Shaun King
Contact Phone	432-6660
Contact Email	shaun.king.@yale.edu
Requested Due Date	22-OCT-2003
Date Requested	08-OCT-2003
Date Approved	Pending
Building Number	1180
Building Name	WHITNEY AVE, 221
Street Address	221 WHITNEY AVE
Floor	2
Room Number	210
Telephone Line Type	Single line desk
Phone Jack Available?	Yes
Jack Number	1234-5678
Voice Mail Requested	Yes
Provide Dial Zero Number	No
Call Pick Up	No
Hunt when busy to voice mail (432.0000)	No
Hunt when busy to a number other than voice mail	No
Forward no answer to voice mail	No
Forward when no answer to a number other than voice mail	No
Installation Charge PTAEO	1007645.00.0001DB.831200.974501
Monthly Charge PTAEO	1007645.00.0001DB.831100.974501

If you want to make another request for this end user click the button below:

Make Another Request

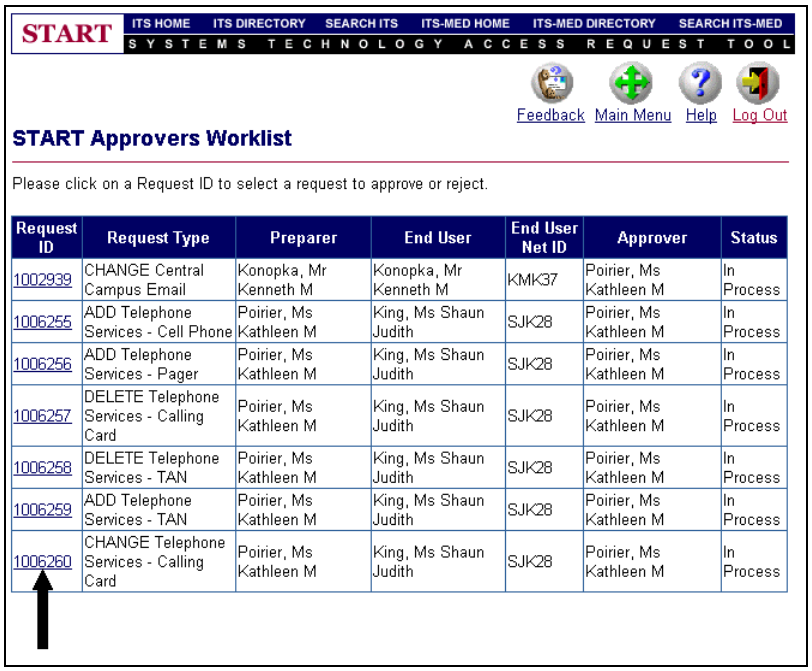
Thank you for using START.

Copyright ©2002
Yale University - Information Technology Services
All rights reserved. Comments or suggestions to the site editor.

If another access/services request needs to be made, the end user may click the **Make Another Request** button. Otherwise, the end user may return to the **Main Menu** using the **Main** function button or **Log Out** of the tool.

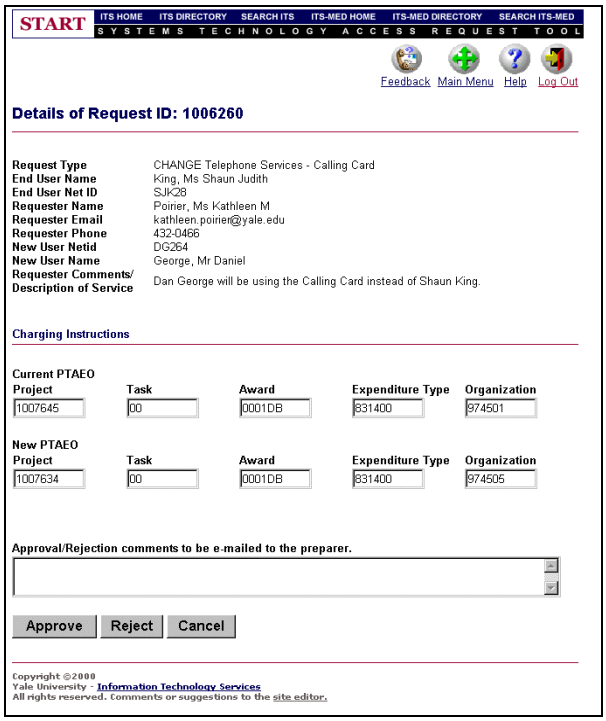
Approving Access/Services (Telecommunications Approvers Only)

Once **Telephone Services** requests have been made, an approval process must take place before the request can move into the appropriate **Telecom Worklist**. Business Managers/Telecommunications Approvers select **Approve Access for Others** from the **Main Menu**. From the **START Approvers Worklist**, the request ID is selected for approval or rejection.



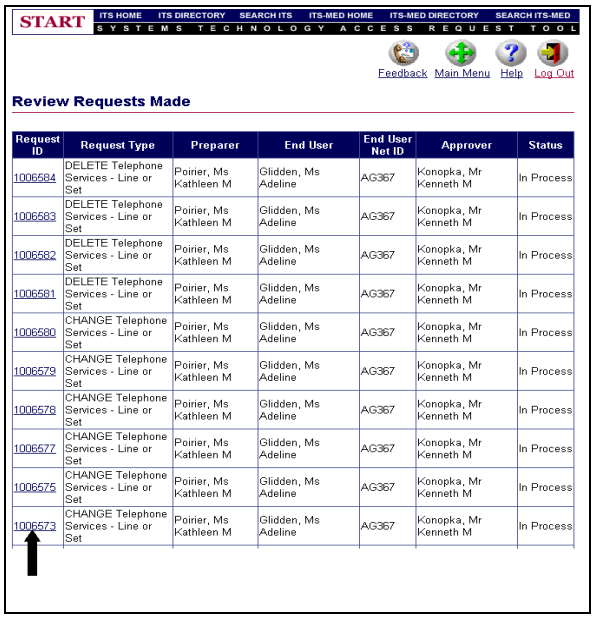
Request ID	Request Type	Preparer	End User	End User Net ID	Approver	Status
1002939	CHANGE Central Campus Email	Konopka, Mr Kenneth M	Konopka, Mr Kenneth M	KMK37	Poirier, Ms Kathleen M	In Process
1006255	ADD Telephone Services - Cell Phone	Poirier, Ms Kathleen M	King, Ms Shaun Judith	SJK28	Poirier, Ms Kathleen M	In Process
1006256	ADD Telephone Services - Pager	Poirier, Ms Kathleen M	King, Ms Shaun Judith	SJK28	Poirier, Ms Kathleen M	In Process
1006257	DELETE Telephone Services - Calling Card	Poirier, Ms Kathleen M	King, Ms Shaun Judith	SJK28	Poirier, Ms Kathleen M	In Process
1006258	DELETE Telephone Services - TAN	Poirier, Ms Kathleen M	King, Ms Shaun Judith	SJK28	Poirier, Ms Kathleen M	In Process
1006259	ADD Telephone Services - TAN	Poirier, Ms Kathleen M	King, Ms Shaun Judith	SJK28	Poirier, Ms Kathleen M	In Process
1006260	CHANGE Telephone Services - Calling Card	Poirier, Ms Kathleen M	King, Ms Shaun Judith	SJK28	Poirier, Ms Kathleen M	In Process

The **Details of Request ID** will display as seen below. Business Managers/Telecommunications Approvers would then select the **Approve**, **Reject**, or **Cancel** button. All comments entered in the **Comments** field will be emailed to the preparer/requester.



Review Requests Made

After a telephone services request has been made, the requester may review the status of the request. From the **Main Menu**, select either **Review Requests Made by Me** or **Review Requests Made - All**. If **Review Requests Made by Me** is chosen, this will link the requester to the **Review Requests Made** screen as seen below.



Request ID	Request Type	Preparer	End User	End User Net ID	Approver	Status
1006584	DELETE Telephone Services - Line or Set	Poirier, Ms Kathleen M	Glidden, Ms Adeline	AG367	Konopka, Mr Kenneth M	In Process
1006583	DELETE Telephone Services - Line or Set	Poirier, Ms Kathleen M	Glidden, Ms Adeline	AG367	Konopka, Mr Kenneth M	In Process
1006582	DELETE Telephone Services - Line or Set	Poirier, Ms Kathleen M	Glidden, Ms Adeline	AG367	Konopka, Mr Kenneth M	In Process
1006581	DELETE Telephone Services - Line or Set	Poirier, Ms Kathleen M	Glidden, Ms Adeline	AG367	Konopka, Mr Kenneth M	In Process
1006580	CHANGE Telephone Services - Line or Set	Poirier, Ms Kathleen M	Glidden, Ms Adeline	AG367	Konopka, Mr Kenneth M	In Process
1006579	CHANGE Telephone Services - Line or Set	Poirier, Ms Kathleen M	Glidden, Ms Adeline	AG367	Konopka, Mr Kenneth M	In Process
1006578	CHANGE Telephone Services - Line or Set	Poirier, Ms Kathleen M	Glidden, Ms Adeline	AG367	Konopka, Mr Kenneth M	In Process
1006577	CHANGE Telephone Services - Line or Set	Poirier, Ms Kathleen M	Glidden, Ms Adeline	AG367	Konopka, Mr Kenneth M	In Process
1006575	CHANGE Telephone Services - Line or Set	Poirier, Ms Kathleen M	Glidden, Ms Adeline	AG367	Konopka, Mr Kenneth M	In Process
1006573	CHANGE Telephone Services - Line or Set	Poirier, Ms Kathleen M	Glidden, Ms Adeline	AG367	Konopka, Mr Kenneth M	In Process

The details of a request may be seen by selecting the Request ID number. The details will be displayed as seen below.

START | ITS HOME | ITS DIRECTORY | SEARCH ITS | ITS-MED HOME | ITS-MED DIRECTORY | SEARCH ITS-MED
SYSTEMS TECHNOLOGY ACCESS REQUEST TOOL

Feedback Main Menu Help Log Out

Details of Request ID: 1006573

Request Type	CHANGE Telephone Services - Line or Set
Status	In Process
Status Comments	Request to CHANGE Telephone Services, Phone Lines and Sets is accepted and is waiting for approval by Konopka, Mr Kenneth M
End User Name	Glidden, Ms Adeline
End User Net ID	AG367
Requester Name	Poirier, Ms Kathleen M
Requester Email	kathleen.poirier@yale.edu
Requester Phone	432-0466
Business Mgr Name	Konopka, Mr Kenneth M
Business Mgr Phone	432-6635
Contact Name	Shaun King
Contact Phone	432-5660
Telephone Number	432-8951
Requested Effective Date	05-FEB-2002
Building Name	WHITNEY AVE, 221
Street Address	221 WHITNEY AVE
Floor	01
Room Number	104
Change User's phone number?	Yes
New Phone Number	436-1234
Change numbers on a Multi-line set?	No
Installation PTAEO	1007645.00.0001DB.831100.974501

If you wish to cancel this request, please click the button below to send a cancel email to Telecom.

Cancel Request

Copyright ©2000
Yale University - Information Technology Services
All rights reserved. Comments or suggestions to the site editor.

Note: When selecting Review Requests Made – All, a date range must first be selected. This will limit the number of requests that will be displayed.

Function Buttons/Links within START

Button	Description
Help	This button is used to link the user to the online tutorial for **START**.
Log Out	This button is used to allow the user to log out of **START**. It is recommended that the user exit **START** by selecting this button otherwise another user could make additional requests under your NetID. The user will be returned to the log on screen for **START. (Note: an end user will automatically be logged out of START 10 hours after logging on).**
Main Menu	This button is used to allow a user to return to the Main Menu screen in **START**.
Previous	This button is used to bring a user to a previous screen in **START**; i.e., the user may return to the **Dashboard** to make additional requests. It is recommended that this button be used rather than the "Back" button on the browser.
Feedback	This button may be used to provide feedback on **START**. The button allows the end user to send an email directly to the helpdesk for comments, questions, or suggestions.
Dashboard	This button is used to bring a user to the **Dashboard** to submit additional requests; i.e., additional adds/changes/deletes.
Submit	This button is used to submit requests for adds, changes or deletes to **START**.
Next	This button is used by the end user to move a Cell Phone request to the **Cell Phone Order** screen. This is required to complete the process of selecting the type of cell phone as well as any accessories.
Reset	This button is used to clear the fields of a request when the end user enters incorrect information and needs to reenter the data.
Copy Request	This button is used to process another telephone services request for the same employee without returning to the **Main Menu**. The button will copy information from the previous request; i.e., End User Name, End User Net ID, Requester Name, Department, Requester E-mail, Business Manager/Approver, etc.
Request Another Service	This button is used to process a request for another service (Email, Meeting Maker, etc.) for the same end user without returning to the **Main Menu** from the **Request Submission Confirmation** page. The requester

	will be returned to the **Dashboard**.
Back to Worklist	This button is used by an Approver/ Telecom End User to return to the **Worklist** without returning to the **Main Menu**.
Approve	This button is used by a Business Manager/Telecommunications Approver to approve a telephone services request. A comment may be entered in the **Comments** field that is emailed to the preparer/requester.
Reject	This button is used by a Business Manager/Telecommunications Approver to reject a telephone services request. The **Reject** button would be used if the telephone service request were no longer needed. A comment **MUST BE** entered in the **Comments** field that is emailed to the preparer/requester.
Cancel	This button is used by a Business Manager/Telecommunications Approver to cancel a telephone services request. The **Cancel** button would be used if the telephone service request were incorrect and needed to be resubmitted. A comment may be entered in the **Comments** field that is emailed to the preparer/requester.
Add Ethernet Connection	This button is used to submit a request for an **Ethernet Connection** after making a telephone sets and lines request. The end user is linked to the **Add Request Details** screen where a separate service request is submitted.

Scenarios

Scenarios 1.1: Calling Cards Add Request

1. From the **Main Menu**, select **Access or Services for Others** under the **START Access for Others** option.
2. Select the end user from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John). **Note: The first option is the preferred method for locating an end user.**
3. From the **START** Dashboard, select the **Add** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **ADD Telephone Services** Menu, select **Calling Cards** and select the **Submit** button.
5. From the **ADD Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone**, **Location** and **Mailstop** will auto-populate.
6. Enter the **Monthly Charge PTAEO** in the required fields.
7. Enter **User Comments/Description of Service**, if applicable.
8. Click the **Submit** button.
9. Print the **Request Submission Confirmation** page to retain for future reference.
10. If additional **Add** telephone services requests need to be made for the same end user scroll down, select the appropriate radio button and click the **Copy Request** button. If another access/services request needs to be made for the employee, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** function button to request a service for another end user or **Log Out** of the tool.

Scenario 1.2: Calling Cards Change Request

1. From the **Main Menu**, select **Access or Services for Others** under the **START Access for Others** option.
2. Select the end user from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John). **Note: The first option is the preferred method for locating an end user.**
3. From the **START** Dashboard, select the **Change** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **CHANGE Telephone Services** Menu, select **Calling Cards** and select the **Submit** button.
5. From the **CHANGE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Enter the **Calling Card Number** in the field.
7. The **Requested Effective Date** will default to the current date. To change the **Requested Effective Date** to a later date, highlight the date and enter a new date in Oracle format; i.e., DD-MMM-YYYY.
8. Select the **Yes** radio button if changing the **PTAEO.**
9. Enter the **Current PTAEO**, and then enter the **New PTAEO**.
10. If the request is to **Reassign Calling Card to a new End User**, select the **Yes** radio button. Select the **New End User** from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John) and click the **Find** button. Select the **New End User** by clicking on the employee's name. The **New End User's** name will auto-populate.
11. Enter **User Comments/Description of Service**, if applicable.
12. Click the **Submit** button.

13. Print the **Request Submission Confirmation** page to retain for future reference.
14. If additional **Change** telephone services requests need to be made for the same end user, scroll down, select the appropriate radio button and click the **Copy Request** button. If another access/services request needs to be made for the employee, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** function button to request a service for another end user or **Log Out** of the tool.

Scenario 1.3: Calling Cards Delete Request

1. From the **Main Menu**, select **Access or Services for Others** under the **START Access for Others** option.
2. Select the end user from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John). **Note: The first option is the preferred method for locating an end user.**
3. From the **START** Dashboard, select the **Delete** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **DELETE Telephone Services** Menu, select **Calling Cards** and select the **Submit** button.
5. From the **DELETE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Calling Card Number** in the field.
7. The **Requested End Date** will default to the current date. To change the **Requested End Date** to a later date, highlight the date and enter a new date in Oracle format; i.e., DD-MMM-YYYY.
8. Enter the **Current PTAEO** in the required fields.
9. Enter **User Comments/Description of Service**, if applicable.
10. Click the **Submit** button.
11. Print the **Request Submission Confirmation** page to retain for future reference.
12. If additional **Delete** telephone services requests need to be made for the same end user, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made for the employee, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** function button to request a service for another end user or **Log Out** of the tool.

Scenario 2.1: Cell Phones Add Request

1. From the **Main Menu**, select **Access or Services for Others** under the **START Access for Others** option.
2. Select the end user from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John). **Note: The first option is the preferred method for locating an end user.**
3. From the **START** Dashboard, select the **Add** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **ADD Telephone Services** Menu, select **Cell Phones** and select the **Submit** button.
5. From the **ADD Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.

6. Enter the **Shipping Address/Street Address** (Address to which the Cell Phone and Accessories will be shipped). (**NOTE: PO BOXES ARE NOT ALLOWED**). Enter floor and room numbers after the **Street Address**, if appropriate.
7. Select the **Cell Phone Service Provider**.
8. Enter the **Installation**, **Monthly**, and **Toll Charge PTAEO**. (**Note: If the installation fee, monthly fee, and toll charge fee is to be charged to the same PTAEO, use the Copy button**).
9. Enter **User Comments**, if applicable.
10. Select the **Next** button.
11. Choose the appropriate **Calling Plan** from the drop down list.
12. Choose the type of cell phone from the drop down list.
13. Select any **Accessories**, if applicable.
14. Click the **Submit** button.
15. Print the **Request Submission Confirmation** page to retain for future reference.
16. If additional **Add** telephone services requests need to be made for the same end user, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made for the employee, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** function button to request a service for another end user or **Log Out** of the tool.

Scenario 2.2: Cell Phones Change Request

1. From the **Main Menu**, select **Access or Services for Others** under the **START Access for Others** option.
2. Select the end user from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John). **Note: The first option is the preferred method for locating an end user.**
3. From the **START** Dashboard, select the **Change** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **CHANGE Telephone Services** Menu, select **Cell Phones** and select the **Submit** button.
5. From the **CHANGE Request Details** screen enter the **Cell Phone Number**.
6. Select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
7. Select the **Cell Phone Provider**.
8. Select the Change Type; i.e., **Monthly Charge PTAEO/User Name/Calling Plan Changes** or **Upgrade Cell Phone Model/Order new accessories**.
9. Click the **Next** button.
10. If **Monthly Charge PTAEO/User Name/Calling Plan Changes** is selected, complete the **CHANGE Request Details** screen.
11. The **Requested Effective Date** will default to the current date. To change the **Requested Effective Date** to a later date, highlight the date and enter a new date in Oracle format; i.e., DD-MMM-YYYY.
12. Select the **Yes** radio button if the request is to change the calling plan. (The button defaults to **No**). Select the **Current Calling Plan** from the drop down list, and then select the **New Calling Plan** from the drop down list.
13. To **Change PTAEO**, select the **Yes** radio button (The button defaults to **No**).

14. Enter the **Current PTAEO** in the required fields, and then enter the **New PTAEO** in the required fields.
15. To **Change Toll PTAEO**, select the **Yes** radio button (The button defaults to **No**).
16. Enter the **New Toll PTAEO** in the required fields.
17. To **Change User Name**, select the **Yes** radio button (The button defaults to **No**).
18. Select the end user from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John). **Note: The first option is the preferred method for locating an end user.**
19. Enter **User Comments**, if applicable.
20. Click the **Submit** button.
21. Print the **Request Submission Confirmation** page to retain for future reference.
22. If **Upgrade Cell Phone Model/Order new accessories** is selected, complete the **CHANGE Request Details** screen.
23. Select the **Yes** radio button if the request is to **Change Cell Phone Model** (The button defaults to **No**). Choose the **New Cell Phone Model** from the drop down list.
24. Select the **Yes** radio button to **Request New Accessories**, if applicable. (The button defaults to **No**).
25. Choose the **Cell Phone Accessories**, as applicable.
26. Enter the **Charging PTAEO** in the required fields.
27. Enter the **Shipping Address/Street Address** (Address to which the Cell Phone and Accessories will be shipped). (**NOTE: PO BOXES ARE NOT ALLOWED**). Enter floor and room numbers after the **Street Address**, if appropriate.
28. Enter **User Comments**, if applicable.
29. Click the **Submit** button.
30. Print the **Request Submission Confirmation** page to retain for future reference.
31. If additional **Change** telephone services requests need to be made for the same end user, scroll down, select the appropriate radio button, and click the Copy Request button. If another access/services request needs to be made for the employee, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** function button to request a service for another end user or **Log Out** of the tool.

Scenario 2.3: Cell Phones Delete Request

1. From the **Main Menu**, select **Access or Services for Others** under the **START Access for Others** option.
2. Select the end user from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John). **Note: The first option is the preferred method for locating an end user.**
3. From the **START** Dashboard, select the **Delete** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **DELETE Telephone Services** Menu, select **Cell Phones** and select the **Submit** button.
5. The **Requested End Date** will default to the current date. To change the **Requested End Date** to a later date, highlight the date and enter a new date in Oracle format; i.e., DD-MMM-YYYY.
6. Select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
7. Type the **Cell Phone Number** in the field.

8. Select the **Cell Phone Service Provider**.
9. Enter the **Monthly Charge PTAEO** in the required fields.
10. Enter **User Comments**, if applicable.
11. Click the **Submit** button.
12. Print the **Request Submission Confirmation** page to retain for future reference.
13. If additional **Delete** telephone services requests need to be made for the same end user, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made for the employee, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** function button to request a service for another end user or **Log Out** of the tool.

Scenario 3.1: Pagers Add Request

1. From the **Main Menu**, select **Access or Services for Others** under the **START Access for Others** option.
2. Select the end user from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John). **Note: The first option is the preferred method for locating an end user.**
3. From the **START** Dashboard, select the **Add** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **ADD Telephone Services** Menu, select **Pagers** and select the **Submit** button.
5. From the **ADD Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Select the **Pager Model** from the drop down list.
7. Select the **Pager Number**.
8. Select **Pager Voice Mail,** if applicable.
9. Choose the **Pager Pick-up Location**.
10. Enter the **Monthly Charge PTAEO** in the required fields.
11. Enter **User Comments**, if applicable.
12. Click the **Submit** button.
13. Print the **Request Submission Confirmation** page to retain for future reference.
14. If additional **Add** telephone services requests need to be made for the same end user, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made for the employee, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** function button to request a service for another end user or **Log Out** of the tool.

Scenario 3.2: Pagers Change Request

1. From the **Main Menu**, select **Access or Services for Others** under the **START Access for Others** option.
2. Select the end user from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John). **Note: The first option is the preferred method for locating an end user.**

3. From the **START** Dashboard, select the **Change** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **CHANGE Telephone Services** Menu, select **Pagers** and select the **Submit** button.
5. From the **CHANGE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Enter the **Pager Phone Number** to be changed.
7. The **Requested Effective Date** will default to the current date. To change the **Requested Effective Date** to a later date, highlight the date and enter a new date in Oracle format; i.e., DD-MMM-YYYY.
8. To **Change Pager Model**, select the **Yes** radio button. (The button defaults to **No**).
9. Select the **Current Pager Model** from the drop down list and then select the **New Pager Model** from the drop down list.
10. To **Change Pager Number Type**, select the **Yes** radio button. (The button defaults to **No**).
11. Select the **Current Pager Number Type** from the drop down list, and then select the **New Pager Number Type** from the drop down list.
12. Enter the **Monthly Charge PTAEO** in the required fields.
13. Select the **Pager Pick up Location**.
14. To **Change PTAEO**, select the **Yes** radio button. (The button defaults to **No**).
15. Enter the **Current PTAEO** and then the **New PTAEO** in the required fields.
16. Enter **User Comments**, if applicable.
17. Click the **Submit** button.
18. Print the **Request Submission Confirmation** page to retain for future reference.
19. If additional **Change** telephone services requests need to be made for the same end user scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made for the employee, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** function button to request a service for another end user or **Log Out** of the tool.

Scenario 3.3: Pagers Delete Request

1. From the **Main Menu**, select **Access or Services for Others** under the **START Access for Others** option.
2. Select the end user from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John). **Note: The first option is the preferred method for locating an end user.**
3. From the **START** Dashboard, select the **Delete** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **DELETE Telephone Services** Menu, select **Pagers** and select the **Submit** button.
5. Select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Enter the **Pager Phone Number** being deleted.
7. The **Date to End Service** defaults to the current date. To change the **Date to End Service** to a later date, highlight the date and enter a new date in Oracle format; i.e., DD-MMM-YYYY.
8. Select the **Pager Drop Off Location**. (**NOTE: THE PAGER MUST BE RETURNED TO ONE OF THE LOCATIONS. BILLING WILL NOT STOP UNTIL THE PAGER IS RETURNED**).

9. Enter the **Monthly Charge PTAEO** in the required fields.
10. Enter **User Comments**, if applicable.
11. Click the **Submit** button.
12. Print the **Request Submission Confirmation** page to retain for future reference.
13. If additional **Delete** telephone services requests need to be made for the same end user, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made for the employee, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** function button to request a service for another end user or **Log Out** of the tool.

Scenario 4.1: TAN (Toll Authorization Number) Add Request

1. From the **Main Menu**, select **Access or Services for Others** under the **START Access for Others** option.
2. Select the end user from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John). **Note: The first option is the preferred method for locating an end user.**
3. From the **START** Dashboard, select the **Add** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **ADD Telephone Services** Menu, select **TANs** and select the **Submit** button.
5. From the **ADD Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone, Location, and Mailstop** will auto-populate.
6. Enter the **Monthly Charge PTAEO** in the required fields.
7. Enter **User Comments/Description of Service**, if applicable.
8. Click the **Submit** button.
9. Print the **Request Submission Confirmation** page to retain for future reference.
10. If additional **Add** telephone services requests need to be made for the same end user, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made for the employee, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** function button to request a service for another end user or **Log Out** of the tool.

Scenario 4.2: TAN (Toll Authorization Number) Change Request

1. From the **Main Menu**, select **Access or Services for Others** under the **START Access for Others** option.
2. Select the end user from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John). **Note: The first option is the preferred method for locating an end user.**
3. From the **START** Dashboard, select the **Change** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **CHANGE Telephone Services** Menu, select **TANs** and select the **Submit** button.

5. From the **CHANGE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Enter the **TAN number** in the required field.
7. The **Requested Effective Date** will default to the current date. To change the **Requested Effective Date** to a later date, highlight the date and enter a new date in Oracle format; i.e., DD-MMM-YYYY.
8. To **Change PTAEO**, select the **Yes** radio button. (The button defaults to **No**).
9. Enter the **Current PTAEO** and then the **New PTAEO** in the required fields.
10. If the request is to **Reassign TAN to a new End User**, select the **Yes** radio button. Select the **New End User** from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John) and click the **Find** button. Select the **New End User** by clicking on the employee's name. The **New End User's** name will auto-populate.
11. Enter **User Comments/Description of Service**, if applicable.
12. Click the **Submit** button.
13. Print the **Request Submission Confirmation** page to retain for future reference.
14. If additional **Change** telephone services requests need to be made for the same end user, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made for the employee, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** function button to request a service for another end user or **Log Out** of the tool.

Scenario 4.3: TAN (Toll Authorization Number) Delete Request

1. From the **Main Menu**, select **Access or Services for Others** under the **START Access for Others** option.
2. Select the end user from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John). **Note: The first option is the preferred method for locating an end user.**
3. From the **START** Dashboard, select the **Delete** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **DELETE Telephone Services** Menu, select **TANs** and select the **Submit** button.
5. From the **DELETE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Enter the **TAN** in the required field.
7. The **Requested End Date** will default to the current date. To change the **Requested End Date** to a later date, highlight the date and enter a new date in Oracle format; i.e., DD-MMM-YYYY.
8. Enter the **Current PTAEO** in the required fields.
9. Enter **User Comments/Description of Service**, if applicable.
10. Click the **Submit** button.
11. Print the **Request Submission Confirmation** page to retain for future reference.
12. If additional **Delete** telephone services requests need to be made for the same end user, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made for the employee, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** function button to request a service for another end user or **Log Out** of the tool.

Scenario 5.1: Telephone Services Add Request

Single Line Details:

1. From the **Main Menu**, select **Access or Services for Others** under the **START Access for Others** option.
2. Select the end user from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John). **Note: The first option is the preferred method for locating an end user.**
3. From the **START** Dashboard, select the **Add** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **ADD Telephone Services** Menu, select **Telephone Services** (telephone sets and lines) and select the **Submit** button.
5. From the **ADD Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Contact Name** and **Contact Phone** (may be either the requester or the end user).
7. The **Requested Due Date** field will default to 10 business days from the date of request. The date may be changed to a later date by typing over the default date in Oracle format; i.e., DD-MMM-YYYY. (**NOTE: IF AN EARLIER INSTALLATION DATE IS NEEDED, CONTACT TONY FERRAIOLO AT 432-2088**)
8. Click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address.
9. Type the **Floor** (01, 02, 03, B) and **Room Number**, as applicable.
10. Select the **Telephone Line Type** – Single Line.
11. Enter the **Installation, Monthly, and Miscellaneous Toll Charge PTAEO**. (**Note: If the installation, monthly, and miscellaneous toll charge fees are to be charged to the same PTAEO, use the Copy button**).
12. Enter **User Comments/Installation Instructions**, if applicable.
13. Click the **Submit** button.
14. Complete the **Single Line Details** screen. Some of the questions default to **No**. If **Yes** is selected for any of the questions (Is there a jack currently available?; Do you want voice mail for this line?; Provide a Dial Zero phone number?; Do you want Call Pick-up for this line?; Should this line "hunt" when busy to voice mail [432-8000]?; Should this line "hunt" when busy to a number other than voice mail?; If all lines are busy, should call "hunt" to voice mail?; Should calls forward no answer to voice mail [432-8000]?; Should calls forward no answer to a number other than voice mail?) , type the required information. (**Note: if requesting Call Pick-up or "hunt" when busy, type one phone number per line in the box provided**).
15. Click the **Submit** button.
16. Print the **Request Submission Confirmation** to retain for future reference.
17. If additional **Add** telephone services requests need to be made for the same end user scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made for the employee, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** function button to request a service for another end user or **Log Out** of the tool.

Note: If an Ethernet Connection is required, select the Add Ethernet Connection button on the Request Submission Confirmation page. This will link the end user to the Add Request Details screen for Ethernet Connections. Complete the appropriate fields and submit the request. Print the Request Submission Confirmation page to retain for future reference.

Multi Line Details:

1. From the **Main Menu**, select **Access or Services for Others** under the **START Access for Others** option.
2. Select the end user from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John). **Note: The first option is the preferred method for locating an end user.**
3. From the **START** Dashboard, select the **Add** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **ADD Telephone Services** Menu, select **Telephone Services** (telephone sets and lines) and select the **Submit** button.
5. From the **ADD Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Contact Name** and **Contact Phone** (may be either the requester or the end user).
7. The **Requested Due Date** field will default to 10 business days from the date of request. The date may be changed to a later date by typing over the default date in Oracle format; i.e., DD-MMM-YYYY. (**NOTE: IF AN EARLIER INSTALLATION DATE IS NEEDED, CONTACT TONY FERRAIOLO AT 432-2088**)
8. Click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address.
9. Type the **Floor** (01, 02, 03, B) and **Room Number**, as applicable.
10. Select the **Telephone Line Type** – Multi Line (3903 set or 3904 set).
11. Enter the **Installation, Monthly, and Miscellaneous Toll Charge PTAEO**. (**Note: If the installation, monthly, and miscellaneous toll charge fees are to be charged to the same PTAEO, use the Copy button**).
12. Enter **User Comments/Installation Instructions**, if applicable.
13. Click the **Submit** button.
14. Complete the **Multi Line Details** screen. Some of the questions default to **No**. If **Yes** is selected for any of the questions (Is there a jack currently available?; Do you want Voicemail for this line?; Provide a Dial Zero phone number?; Do you want Call Pick-up for this line?; Do you want additional lines for this set?; Are there existing numbers that you want added to this set?; Do you want any NEW additional numbers?; Should the main line "hunt" when busy to voice mail [432-8000]?; Should the main line "hunt" when busy to a number other than voice mail?; Should calls forward no answer to voice mail?; Should calls forward no answer to a number other than voice mail?) , type the required information. (**Note: if requesting Call Pick-up, want additional lines that exist added to the set, or numbers to "hunt" when busy, type one phone number per line in the box provided**).
15. Click the **Submit** button.
16. Print the **Request Submission Confirmation** to retain for future reference.
17. If additional **Add** telephone services requests need to be made for the same end user scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made for the employee, click the **Request Another Service** button. Otherwise,

return to the **Main Menu** using the **Main** function button to request a service for another end user or **Log Out** of the tool.

Note: If an Ethernet Connection is required, select the Add Ethernet Connection button on the Request Submission Confirmation page. This will link the end user to the Add Request Details screen for Ethernet Connections. Complete the appropriate fields and submit the request. Print the Request Submission Confirmation page to retain for future reference.

Fax/Modem Line Details:

1. From the **Main Menu**, select **Access or Services for Others** under the **START Access for Others** option.
2. Select the end user from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John). **Note: The first option is the preferred method for locating an end user.**
3. From the **START** Dashboard, select the **Add** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **ADD Telephone Services** Menu, select **Telephone Services** (telephone sets and lines) and select the **Submit** button.
5. From the **ADD Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Contact Name** and **Contact Phone** (may be either the requester or the end user).
7. The **Requested Due Date** field will default to 10 business days from the date of request. The date may be changed to a later date by typing over the default date in Oracle format; i.e., DD-MMM-YYYY. (**NOTE: IF AN EARLIER INSTALLATION DATE IS NEEDED, CONTACT TONY FERRAIOLO AT 432-2088**)
8. Click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address.
9. Type the **Floor** (01, 02, 03, B) and **Room Number**, as applicable.
10. Select the **Telephone Line Type** – Fax line-Modem.
11. Enter the **Installation, Monthly, and Miscellaneous Toll Charge PTAEO**. (**Note: If the installation, monthly, and miscellaneous toll charge fees are to be charged to the same PTAEO, use the Copy button**).
12. Enter **User Comments/Installation Instructions**, if applicable.
13. Click the **Submit** button.
14. A message box will display, "Is there a jack currently available for this Fax line?" Click **OK** for **Yes**, **Cancel** for **No**. If **Yes** is selected, a message box will display, "Please enter the Jack Number in the box provided here." **Cancel** will bring you to the **Request Submission Confirmation** screen.
15. Print the **Request Submission Confirmation** to retain for future reference.
16. If additional **Add** telephone services requests need to be made for the same end user scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made for the employee, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** function button to request a service for another end user or **Log Out** of the tool.

Note: If an Ethernet Connection is required, select the Add Ethernet Connection button on the Request Submission Confirmation page. This will link the end user to the Add Request Details

screen for Ethernet Connections. Complete the appropriate fields and submit the request. Print the Request Submission Confirmation page to retain for future reference.

Other (DSL Service, Mechanical Circuit, Emergency Phone, Area of Refuge Phone, Fiber Circuit or Residential Line, Video Conferencing, or Cable TV):

1. From the **Main Menu**, select **Access or Services for Others** under the **START Access for Others** option.
2. Select the end user from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John). **Note: The first option is the preferred method for locating an end user.**
3. From the **START** Dashboard, select the **Add** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **ADD Telephone Services** Menu, select **Telephone Services** (telephone sets and lines) and select the **Submit** button.
5. From the **ADD Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Contact Name** and **Contact Phone** (may be either the requester or the end user).
7. The **Requested Due Date** field will default to 10 business days from the date of request. The date may be changed to a later date by typing over the default date in Oracle format; i.e., DD-MMM-YYYY. (**NOTE: IF AN EARLIER INSTALLATION DATE IS NEEDED, CONTACT TONY FERRAIOLO AT 432-2088**)
8. Click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address. **(Note: The home building should be selected as a reference point)**.
9. Type the **Floor** (01, 02, 03, B) and **Room Number**, as applicable.
10. Select the **Telephone Line Type** – Other. Type the specific request in the box; i.e., **DSL Service**, **Mechanical Circuit**, **Emergency Phone**, **Area of Refuge Phone**, **Fiber Circuit or Residential Line**, **Video Conferencing**, or **Cable TV**).
11. Enter the **Installation, Monthly, and Miscellaneous Toll Charge PTAEO**. (**Note: If the installation, monthly, and toll charge fees are to be charged to the same PTAEO, use the Copy button**).
12. Enter **User Comments/Installation Instructions** (provide additional information such as residential address, when applicable).
13. Click the **Submit** button.
14. Print the **Request Submission Confirmation** to retain for future reference.
15. If additional **Add** telephone services requests need to be made for the same end user, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made for the employee, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** function button to request a service for another end user or **Log Out** of the tool.

Note: If an Ethernet Connection is required, select the Add Ethernet Connection button on the Request Submission Confirmation page. This will link the end user to the Add Request Details screen for Ethernet Connections. Complete the appropriate fields and submit the request. Print the Request Submission Confirmation page to retain for future reference.

Scenario 5.2: Telephone Services Change Request

Phone Set Type Changes:

1. From the **Main Menu**, select **Access or Services for Others** under the **START Access for Others** option.
2. Select the end user from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John). **Note: The first option is the preferred method for locating an end user.**
3. From the **START** Dashboard, select the **Change** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **CHANGE Telephone Services** Menu, select **Telephone Services** (telephone sets, lines and voicemail) and select the **Submit** button.
5. From the **CHANGE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Contact Name** and **Contact Phone** (may be either the requester or the end user).
7. Type the **Telephone Number to be Changed** in the field.
8. The **Requested Effective Date** field will default to 10 business days from date of request. The date may be changed to a later date by typing over the default date in Oracle format; i.e., DD-MMM-YYYY. (**NOTE: IF AN EARLIER INSTALLATION DATE IS NEEDED, CONTACT TONY FERRAIOLO AT 432-2088**)
9. Click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address.
10. Type the **Floor** (01, 02, 03, B) and **Room Number**, as applicable.
11. Enter the **Installation Charge PTAEO (To be charged for changing service)**.
12. Select the **Change Type** (Phone Set Type Changes).
13. Enter **User Comments/Installation Instructions**, if applicable.
14. Click the **Submit** button.
15. Complete the **Phone Set Type Changes** screen. Choose the **Current Set Type**; next select the **New Set Type**. Some of the questions default to **No**. If **Yes** is selected for any of the questions (Should this line "hunt" when busy to voice mail [432-8000]?; Should this line "hunt" when busy to a number other than voice mail?; If all lines are busy, should call "hunt" to voice mail?; Should calls forward no answer to voice mail [432-8000]?; Should calls forward no answer to a number other than voice mail?), type the required information.
16. Enter **User Comments**, if applicable.
17. Click the **Submit** button.
18. Print the **Request Submission Confirmation** to retain for future reference.
19. If additional **Change** telephone services requests need to be made for the same end user scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made for the employee, click the **Request Another Service** button. Otherwise,

return to the **Main Menu** using the **Main** function button to request a service for another end user or **Log Out** of the tool.

Phone Number/Line Appearance Changes:

1. From the **Main Menu**, select **Access or Services for Others** under the **START Access for Others** option.
2. Select the end user from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John). **Note: The first option is the preferred method for locating an end user.**
3. From the **START** Dashboard, select the **Change** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **CHANGE Telephone Services** Menu, select **Telephone Services** (telephone sets, lines and voicemail) and select the **Submit** button.
5. From the **CHANGE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Contact Name** and **Contact Phone** (may be either the requester or the end user).
7. Enter the **Telephone Number to be Changed** in the field.
8. The **Requested Effective Date** field will default to 10 business days from date of request. The date may be changed to a later date by typing over the default date in Oracle format; i.e., DD-MMM-YYYY. (**NOTE: IF AN EARLIER INSTALLATION DATE IS NEEDED, CONTACT TONY FERRAIOLO AT 432-2088**)
9. Click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address.
10. Type the **Floor** (01, 02, 03, B) and **Room Number**, as applicable.
11. Enter the **Installation Charge PTAEO (To be charged for changing service)**.
12. Select the **Change Type** (Phone Number/Line Appearance Changes).
13. Enter **User Comments/Installation Instructions**, if applicable.
14. Click the **Submit** button.
15. Complete the **Phone Number/Line Appearance Changes** screen. All questions default to **No**. If **Yes** is selected for any of the questions (Change User's telephone number?; Change Existing telephone number on multi-line set?; Do you want to add numbers to this set?; Are there existing numbers that you want added to this set?; Do you want any NEW additional numbers?; Do you want to remove numbers from this set?), type the required information.
16. Enter **User Comments**, if applicable.
17. Click the **Submit** button.
18. Print the **Request Submission Confirmation** to retain for future reference.
19. If additional **Change** telephone services requests need to be made for the same end user scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made for the employee, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** function button to request a service for another end user or **Log Out** of the tool.

Voicemail Changes:

1. From the **Main Menu**, select **Access or Services for Others** under the **START Access for Others** option.
2. Select the end user from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John). **Note: The first option is the preferred method for locating an end user.**
3. From the **START** Dashboard, select the **Change** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **CHANGE Telephone Services** Menu, select **Telephone Services** (telephone sets, lines and voicemail) and select the **Submit** button.
5. From the **CHANGE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Contact Name** and **Contact Phone** (may be either the requester or the end user).
7. Enter the **Telephone Number to be Changed** in the field.
8. The **Requested Effective Date** field will default to 10 business days from date of request. The date may be changed to a later date by typing over the default date in Oracle format; i.e., DD-MMM-YYYY. (**NOTE: IF AN EARLIER INSTALLATION DATE IS NEEDED, CONTACT TONY FERRAIOLO AT 432-2088**)
9. Click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address.
10. Type the **Floor** (01, 02, 03, B) and **Room Number**, as applicable.
11. Enter the **Installation Charge PTAEO (To be charged for changing service)**.
12. Select the **Change Type** (Voicemail Changes).
13. Enter **User Comments/Installation Instructions**, if applicable.
14. Click the **Submit** button.
15. Complete the **Voicemail Changes** screen. All questions default to **No**. If **Yes** is selected for any of the questions (Do you want to add voice mail for this line?; Provide a Dial Zero phone number?; Do you want to change the Dial Zero phone number?; Do you want to remove voice mail from this line?), type the required information. (**NOTE: A DIAL ZERO PHONE NUMBER ALLOWS THE CALLER THE OPTION TO DIAL ZERO TO SPEAK TO A PERSON INSTEAD OF LEAVING A VOICE MAIL MESSAGE; TO RESET PASSCODES, AN E-MAIL SHOULD BE SENT REQUESTING THE PASSCODE RESETS TO tmo@yale.edu AND PROVIDE THE NEW USER'S NAME**).
16. Enter **User Comments**, if applicable.
17. Click the **Submit** button.
18. Print the **Request Submission Confirmation** to retain for future reference.
19. If additional **Change** telephone services requests need to be made for the same end user scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made for the employee, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** function button to request a service for another end user or **Log Out** of the tool.

Call Pick Up Changes:

1. From the **Main Menu**, select **Access or Services for Others** under the **START Access for Others** option.

2. Select the end user from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John). **Note: The first option is the preferred method for locating an end user.**
3. From the **START** Dashboard, select the **Change** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **CHANGE Telephone Services** Menu, select **Telephone Services** (telephone sets, lines and voicemail) and select the **Submit** button.
5. From the **CHANGE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Contact Name** and **Contact Phone** (may be either the requester or the end user).
7. Enter the **Telephone Number to be Changed** in the field.
8. The **Requested Effective Date** field will default to 10 business days from date of request. The date may be changed to a later date by typing over the default date in Oracle format; i.e., DD-MMM-YYYY. (**NOTE: IF AN EARLIER INSTALLATION DATE IS NEEDED, CONTACT TONY FERRAIOLO AT 432-2088**)
9. Click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address.
10. Type the **Floor** (01, 02, 03, B) and **Room Number**, as applicable.
11. Enter the **Installation Charge PTAEO (To be charged for changing service)**.
12. Select the **Change Type** (Call Pick Up Changes).
13. Enter **User Comments/Installation Instructions**, if applicable.
14. Click the **Submit** button.
15. Complete the **Call Pick-up Changes** screen. All questions default to **No**. If **Yes** is selected for any of the questions (Do you want to add Call Pick-up for this line?; Do you want to remove this line from Call Pick-up?; Do you want to Create a new Call Pick-up group?; Do you want to remove Call Pick-up from a group?), type the required information..
16. Enter **User Comments**, if applicable.
17. Click the **Submit** button.
18. Print the **Request Submission Confirmation** to retain for future reference.
19. If additional **Change** telephone services requests need to be made for the same end user scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made for the employee, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** function button to request a service for another end user or **Log Out** of the tool.

Call Forwarding Changes (hunt when busy, forward no answer):

1. From the **Main Menu**, select **Access or Services for Others** under the **START Access for Others** option.
2. Select the end user from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John). **Note: The first option is the preferred method for locating an end user.**
3. From the **START** Dashboard, select the **Change** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **CHANGE Telephone Services** Menu, select **Telephone Services** (telephone sets, lines and voicemail) and select the **Submit** button.

5. From the **CHANGE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Contact Name** and **Contact Phone** (may be either the requester or the end user).
7. Enter the **Telephone Number to be Changed** in the field.
8. The **Requested Effective Date** field will default to 10 business days from date of request. The date may be changed to a later date by typing over the default date in Oracle format; i.e., DD-MMM-YYYY. (**NOTE: IF AN EARLIER INSTALLATION DATE IS NEEDED, CONTACT TONY FERRAIOLO AT 432-2088**)
9. Click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address.
10. Type the **Floor** (01, 02, 03, B) and **Room Number**, as applicable.
11. Enter the **Installation Charge PTAEO (To be charged for changing service)**.
12. Select the **Change Type** (Call Forwarding Changes [hunt when busy, forward no answer]).
13. Enter **User Comments/Installation Instructions**, if applicable.
14. Click the **Submit** button.
15. Complete the **Call Forwarding Changes** screen. Some of the questions default to **No**. If **Yes** is selected for any of the questions (Should this line "hunt" when busy to voice mail [432-8000]?; Should this line "hunt" when busy to a number other than voice mail?; If all lines are busy, should call "hunt" to voice mail?; Should calls forward no answer to voice mail [432-8000]?; Should calls forward no answer to a number other than voice mail?; Remove "hunt" when busy?; Remove forward when no answer?), type the required information..
16. Enter **User Comments**, if applicable.
17. Click the **Submit** button.
18. Print the **Request Submission Confirmation** to retain for future reference.
19. If additional **Change** telephone services requests need to be made for the same end user scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made for the employee, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** function button to request a service for another end user or **Log Out** of the tool.

PTAEO/User Name Changes:

1. From the **Main Menu**, select **Access or Services for Others** under the **START Access for Others** option.
2. Select the end user from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John). **Note: The first option is the preferred method for locating an end user.**
3. From the **START** Dashboard, select the **Change** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **CHANGE Telephone Services** Menu, select **Telephone Services** (telephone sets, lines and voicemail) and select the **Submit** button.
5. From the **CHANGE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Contact Name** and **Contact Phone** (may be either the requester or the end user).
7. Enter the **Telephone Number to be Changed** in the field.

8. The **Requested Effective Date** field will default to 10 business days from date of request. The date may be changed to a later date by typing over the default date in Oracle format; i.e., DD-MMM-YYYY. (**NOTE: IF AN EARLIER INSTALLATION DATE IS NEEDED, CONTACT TONY FERRAIOLO AT 432-2088**)
9. Click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address.
10. Type the **Floor** (01, 02, 03, B) and **Room Number**, as applicable.
11. Enter the **Installation Charge PTAEO.**
12. Select the **Change Type** (PTAEO/User Name Changes).
13. Enter **User Comments/Installation Instructions**, if applicable.
14. Click the **Submit** button.
15. Complete the **PTAEO/User Name Changes** screen. All questions default to **No**. If **Yes** is selected for any of the questions (New PTAEO for monthly charging?; New PTAEO for miscellaneous toll charging?; Change User Name?), type the required information. Enter the segments of the PTAEO as indicated. To change the **User Name**, select the user from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John). **Note: The first option is the preferred method for locating an end user.**

    (NOTE: PLEASE USE THE LIBERTY RESPONSE SPREADSHEET FOR "MASS" UPDATES AT http://risimgw1.its.yale.edu.)
16. Enter **User Comments**, if applicable.
17. Click the **Submit** button.
18. Print the **Request Submission Confirmation** to retain for future reference.
19. If additional **Change** telephone services requests need to be made for the same end user scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made for the employee, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** function button to request a service for another end user or **Log out** of the tool.

Phone Set Moves:

1. From the **Main Menu**, select **Access or Services for Others** under the **START Access for Others** option.
2. Select the end user from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John). **Note: The first option is the preferred method for locating an end user.**
3. From the **START** Dashboard, select the **Change** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **CHANGE Telephone Services** Menu, select **Telephone Services** (telephone sets, lines and voicemail) and select the **Submit** button.
5. From the **CHANGE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Contact Name** and **Contact Phone** (may be either the requester or the end user).
7. Enter the **Telephone Number to be Changed** in the field.
8. The **Requested Effective Date** field will default to 10 business days from date of request. The date may be changed to a later date by typing over the default date in Oracle format; i.e., DD-MMM-

YYYY. (**NOTE: IF AN EARLIER INSTALLATION DATE IS NEEDED, CONTACT TONY FERRAIOLO AT 432-2088**)

9. Click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address.
10. Type the **Floor** (01, 02, 03, B) and **Room Number**, as applicable.
11. Enter the **Installation Charge PTAEO (To be charged for changing service)**.
12. Select the **Change Type** (Phone Set Moves).
13. Enter **User Comments/Installation Instructions**, if applicable.
14. Click the **Submit** button.
15. Complete the **Move Phone Set to a New Location** screen. If the phone set is being moved to a new location or there is a change at the same location, select the location using the List of Values button (**LOV**). To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address. There is one question that defaults to **No**. If **Yes** is selected for the question (Is there a jack currently available?), type the required information.
16. Enter **User Comments**, if applicable.
17. Click the **Submit** button.
18. Print the **Request Submission Confirmation** to retain for future reference.
19. If additional **Change** telephone services requests need to be made for the same end user scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made for the employee, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** function button to request a service for another end user or **Log Out** of the tool.

Scenario 5.3: Telephone Services Delete Requests Single Line Details:

1. From the **Main Menu**, select **Access or Services for Others** under the **START Access for Others** option.
2. Select the end user from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John). **Note: The first option is the preferred method for locating an end user.**
3. From the **START** Dashboard, select the **Delete** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **DELETE Telephone Services** Menu, select **Telephone Services** (telephone sets and lines) and select the **Submit** button.
5. From the **DELETE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Contact Name** and **Contact Phone** (may be either the requester or the end user).
7. Enter **the Telephone Number to be Deleted** in the field.
8. The **Requested End Date** field will default to 10 business days from date of request. The date may be changed to a later date by typing over the default date in Oracle format; i.e., DD-MMM-YYYY.

(**NOTE: IF AN EARLIER DELETION DATE IS NEEDED, CONTACT TONY FERRAIOLO AT 432-2088**)

9. Click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address.
10. Type the **Floor** (01, 02, 03, B) and **Room Number**, as applicable.
11. Select the **Telephone Line Type** – Single Line.
12. Enter the **Monthly Charge PTAEO**.
13. Enter **User Comments/Installation Instructions**, if applicable.
14. Click the **Submit** button.
15. Print the **Request Submission Confirmation** to retain for future reference.
16. If additional **Delete** telephone services requests need to be made for the same end user scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made for the employee, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** function button to request a service for another end user or **Log Out** of the tool.

Multi Line Details:

1. From the **Main Menu**, select **Access or Services for Others** under the **START Access for Others** option.
2. Select the end user from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John). **Note: The first option is the preferred method for locating an end user.**
3. From the **START** Dashboard, select the **Delete** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **DELETE Telephone Services** Menu, select **Telephone Services** (telephone sets and lines) and select the **Submit** button.
5. From the **DELETE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Contact Name** and **Contact Phone** (may be either the requester or the end user).
7. Enter the **Telephone Number to be Deleted** in the field.
8. The **Requested End Date** field will default to 10 business days from date of request. The date may be changed to a later date by typing over the default date in Oracle format; i.e., DD-MMM-YYYY. (**NOTE: IF AN EARLIER DELETION DATE IS NEEDED, CONTACT TONY FERRAIOLO AT 432-2088**)
9. Click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address.
10. Type the **Floor** (01, 02, 03, B) and **Room Number**, as applicable.
11. Select the **Telephone Line Type** – Multi Line (3903 set or 3904 set).
12. Enter the **Monthly Charge PTAEO**.
13. Enter **User Comments/Installation Instructions**, if applicable.

14. Click the **Submit** button.
15. Print the **Request Submission Confirmation** to retain for future reference.
16. If additional **Delete** telephone services requests need to be made for the same end user scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made for the employee, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** function button to request a service for another end user or **Log Out** of the tool.

Fax/Modem Line Details:

1. From the **Main Menu**, select **Access or Services for Others** under the **START Access for Others** option.
2. Select the end user from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John). **Note: The first option is the preferred method for locating an end user.**
3. From the **START** Dashboard, select the **Delete** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **DELETE Telephone Services** Menu, select **Telephone Services** (telephone sets and lines) and select the **Submit** button.
5. From the **DELETE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Contact Name** and **Contact Phone** (may be either the requester or the end user).
7. Enter the **Telephone Number to be Deleted** in the field.
8. The **Requested End Date** field will default to 10 business days from date of request. The date may be changed to a later date by typing over the default date in Oracle format; i.e., DD-MMM-YYYY. (**NOTE: IF AN EARLIER DELETION DATE IS NEEDED, CONTACT TONY FERRAIOLO AT 432-2088**)
9. Click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address.
10. Type the **Floor** (01, 02, 03, B) and **Room Number**, as applicable.
11. Select the **Telephone Line Type** – Fax Line-Modem.
12. Enter the **Monthly Charge PTAEO**.
13. Enter **User Comments/Installation Instructions**, if applicable.
14. Click the **Submit** button.
15. Print the **Request Submission Confirmation** to retain for future reference.
16. If additional **Delete** telephone services requests need to be made for the same end user scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made for the employee, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** function button to request a service for another end user or **Log Out** of the tool.

Other (DSL Service, Mechanical Circuit, Emergency Phone, Area of Refuge Phone, Fiber Circuit or Residential Line, Video Conferencing, or Cable TV):

1. From the **Main Menu**, select **Access or Services for Others** under the **START Access for Others** option.
2. Select the end user from the List of Values (**LOV**). Use either the search method "**NetID**" "**Is**" (js85) or "**Full Name**" "**Is**" (Smith, Mr John). **Note: The first option is the preferred method for locating an end user.**
3. From the **START** Dashboard, select the **Delete** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **DELETE Telephone Services** Menu, select **Telephone Services** (telephone sets and lines) and select the **Submit** button.
5. From the **DELETE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Contact Name** and **Contact Phone** (may be either the requester or the end user).
7. Enter the **Telephone Number to be Deleted** in the field.
8. The **Requested End Date** field will default to 10 business days from date of request. The date may be changed to a later date by typing over the default date in Oracle format; i.e., DD-MMM-YYYY. (**NOTE: IF AN EARLIER DELETION DATE IS NEEDED, CONTACT TONY FERRAIOLO AT 432-2088**)
9. Click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address.
10. Type the **Floor** (01, 02, 03, B) and **Room Number**, as applicable.
11. Select the **Telephone Line Type** – Other. Type the specific request in the box; i.e., DSL Service, Mechanical Circuit, Emergency Phone, Area of Refuge Phone, or Fiber Circuit or Residential Line, Video Conferencing, Cable TV).
12. Enter the **Monthly Charge PTAEO**.
13. Enter **User Comments/Installation Instructions** (provide additional information such as residential address, if applicable).
14. Click the **Submit** button.
15. Print the **Request Submission Confirmation** to retain for future reference.
16. If additional **Delete** telephone services requests need to be made for the same end user scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made for the employee, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** function button to request a service for another end user or **Log Out** of the tool.

Scenario 6.1: Telephone Services Add Request for a Department

Calling Cards:

1. From the **Main Menu**, select **Request Services** under the **START Services for Departments** option.
2. Select the Department/Organization from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSODL,

FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501, 787001). **Note: The second option is the preferred method for locating an organization.**

3. From the **START** Dashboard, select the **Add** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **ADD Telephone Services** menu, select **Calling Cards** and select the **Submit** button.
5. From the **ADD Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone**, **Location** and **Mailstop** will auto-populate.
6. Type the Project, Task and Award segments of the **Monthly Charge PTAEO** in the required fields (the Organization segment will auto-populate).
7. Enter **User Comments/Description of Service**, if applicable.
8. Click the **Submit** button.
9. Print the **Request Submission Confirmation** page to retain for future reference.
10. If additional **Add** telephone services requests need to be made for the same department/organization, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** Menu function button to request a service for another department/organization or **Log Out** of the tool.

Cell Phones:

1. From the **Main Menu**, select **Request Services** under the **START Services for Departments** option.
2. Select the Department/Organization from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSODL, FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501, 787001). **Note: The second option is the preferred method for locating an organization.**
3. From the **START** Dashboard, select the **Add** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **ADD Telephone Services** menu, select **Cell Phones** and select the **Submit** button.
5. From the **ADD Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Enter the **Shipping Address/Street Address** (Address to which the Cell Phone and Accessories will be shipped). (**NOTE: PO BOXES ARE NOT ALLOWED**). Enter floor and room numbers after the **Street Address**, if appropriate.
7. Select the **Cell Phone Service Provider**.
8. Enter the **Installation**, **Monthly**, and **Toll Charge PTAEO**. (**Note: If the installation, monthly, and toll charge fees are to be charged to the same PTAEO, use the Copy button**).
9. Enter **User Comments**, if applicable.
10. Click the **Next** button.
11. Choose the appropriate **Calling Plan** from the drop down list.
12. Choose the type of cell phone from the drop down list.
13. Select any **Accessories**, if applicable.
14. Click the **Submit** button
15. Print the **Request Submission Confirmation** page to retain for future reference.
16. If additional **Add** telephone services requests need to be made for the same department/organization, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made, click the **Request Another Service** button. Otherwise,

return to the **Main Menu** using the **Main** Menu function button to request a service for another department/organization or **Log Out** of the tool.

Pagers:

1. From the **Main Menu**, select **Request Services** under the **START Services for Departments** option.
2. Select the Department/Organization from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSODL, FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501, 787001). **Note: The second option is the preferred method for locating an organization.**
3. From the **START** Dashboard, select the **Add** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **ADD Telephone Services** menu, select **Pagers** and select the **Submit** button.
5. From the **ADD Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Select the **Pager Model** from the drop down list.
7. Select the **Pager Number**.
8. Select **Pager Voice Mail**, if applicable.
9. Choose the **Pager Pick-up Location**.
10. Type the Project, Task, and Award segments of the **Monthly Charge PTAEO** in the required fields (the Organization segment will auto-populate).
11. Enter **User Comments**, if applicable.
12. Click the **Submit** button.
13. Print the **Request Submission Confirmation** page to retain for future reference.
14. If additional **Add** telephone services requests need to be made for the same department/organization, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** Menu function button to request a service for another department/organization or **Log Out** of the tool.

TAN (Toll Authorization Number):

1. From the **Main Menu**, select **Request Services** under the **START Services for Departments** option.
2. Select the Department/Organization from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSODL, FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501, 787001). **Note: The second option is the preferred method for locating an organization.**
3. From the **START** Dashboard, select the **Add** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **ADD Telephone Services** menu, select **TANs** and select the **Submit** button.
5. From the **ADD Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone**, **Location** and **Mailstop** will auto-populate.
6. Type the Project, Task, and Award segments of the **Monthly Charge PTAEO** in the required fields (the Organization segment will auto-populate).
7. Enter **User Comments/Description of Service**, if applicable.
8. Click the **Submit** button.
9. Print the **Request Submission Confirmation** page to retain for future reference.

10. If additional **Add** telephone services requests need to be made for the same department/organization, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** Menu function button to request a service for another department/organization or **Log Out** of the tool.

Telephone Services (telephone sets and lines): Single Line Details:

1. From the **Main Menu**, select **Request Services** under the **START Services for Departments** option.
2. Select the Department/Organization from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSOLD, FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501). **Note: The second option is the preferred method for locating an organization.**
3. From the **START** Dashboard, select the **Add** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **ADD Telephone Services** Menu, select **Telephone Services** (telephone sets and lines) and select the **Submit** button.
5. From the **ADD Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Contact Name** and **Contact Phone** (may be either the requester or the end user).
7. The **Requested Due Date** field will default to 10 business days from date of request. The date may be changed to a later date by typing over the default date. (**NOTE: IF AN EARLIER INSTALLATION DATE IS NEEDED, CONTACT TONY FERRAIOLO AT 432-2088**)
8. Click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address.
9. Type the **Floor** (01, 02, 03, B) and **Room Number**, if applicable.
10. Select the **Telephone Line Type** – Single Line.
11. Enter the **Installation, Monthly, and Miscellaneous Toll Charge PTAEO**. (**Note: If the installation, monthly, and miscellaneous toll charge fees are to be charged to the same PTAEO, use the Copy button**).
12. Enter **User Comments/Installation Instructions**, if applicable.
13. Click the **Submit** button.
14. Complete the **Single Line Details** screen. Some of the questions default to **No**. If **Yes** is selected for any of the questions (Is there a jack currently available?; Do you want Voicemail for this line?; Provide a Dial Zero phone number?; Do you want Call Pick-up for this line?; Should this line "hunt" when busy to voice mail (432-8000)?; Should this line "hunt" when busy to a number other than voice mail? If all lines are busy should call "hunt" to voicemail? Should calls forward no answer to voice mail (432-8000)? Should calls forward no answer to a number other than voice mail?) , type the required information. (**Note: if requesting Call Pick-up or "hunt" when busy, type one phone number per line in the box provided**).
15. Click the **Submit** button.
16. Print the **Request Submission Confirmation** to retain for future reference.
17. If additional **Add** telephone services requests need to be made for the same department/organization, scroll down, select the appropriate radio button, and click the **Copy**

Request button. If another access/services request needs to be made, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** Menu function button to request a service for another department/organization or **Log Out** of the tool.

Note: If an Ethernet Connection is required, select the Add Ethernet Connection button on the Request Submission Confirmation page. This will link the end user to the Add Request Details screen for Ethernet Connections. Complete the appropriate fields and submit the request. Print the Request Submission Confirmation page to retain for future reference.

Multi Line Details:

1. From the **Main Menu**, select **Request Services** under the **START Services for Departments** option.
2. Select the Department/Organization from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSOLD, FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501). **Note: The second option is the preferred method for locating an organization.**
3. From the **START** Dashboard, select the **Add** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **ADD Telephone Services** Menu, select **Telephone Services** (telephone sets and lines) and select the **Submit** button.
5. From the **ADD Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Contact Name** and **Contact Phone** (may be either the requester or the end user).
7. The **Requested Due Date** field will default to 10 business days from date of request. The date may be changed to a later date by typing over the default date. **NOTE: IF AN EARLIER INSTALLATION DATE IS NEEDED, CONTACT TONY FERRAIOLO AT 432-2088**)
8. Click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address.
9. Type the **Floor** (01, 02, 03, B) and **Room Number**, if applicable.
10. Select the **Telephone Line Type** – Multi Line (3903 set or 3904 set).
11. Enter the **Installation, Monthly, and Miscellaneous Toll Charge PTAEO**. (**Note: If the installation, monthly, and miscellaneous toll charge fees are to be charged to the same PTAEO, use the Copy button**).
12. Enter **User Comments/Installation Instructions**, if applicable.
13. Click the **Submit** button.
14. Complete the **Multi Line Details** screen. Some of the questions default to **No**. If **Yes** is selected for any of the questions (Is there a jack currently available?; Do you want Voicemail for this line?; Provide a Dial Zero phone number?; Do you want Call Pick-up for this line?; Do you want additional lines for this set?; Are there existing numbers that you want added to this set?; Do you want any NEW additional numbers?; Should the main line "hunt" when busy to voicemail [432-8000]?; Should the main line "hunt " when busy to a number other than voicemail?; Should calls forward no answer to voicemail [432-8000]?; Should calls forward no answer to a number other than voicemail?) , type the required information. (**Note: if requesting Call Pick-up, want additional lines that exist, or numbers to "hunt" when busy, type one phone number per line in the box provided**).
15. Click the **Submit** button.

16. Print the **Request Submission Confirmation** to retain for future reference.
17. If additional **Add** telephone services requests need to be made for the same department/organization, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** Menu function button to request a service for another department/organization or **Log Out** of the tool.

Note: If an Ethernet Connection is required, select the Add Ethernet Connection button on the Request Submission Confirmation page. This will link the end user to the Add Request Details screen for Ethernet Connections. Complete the appropriate fields and submit the request. Print the Request Submission Confirmation page to retain for future reference.

Fax/Modem Line Details:

1. From the **Main Menu**, select **Request Services** under the **START Services for Departments** option.
2. Select the Department/Organization from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSOLD, FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501). **Note: The second option is the preferred method for locating an organization.**
3. From the **START** Dashboard, select the **Add** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **ADD Telephone Services** Menu, select **Telephone Services** (telephone sets and lines) and select the **Submit** button.
5. From the **ADD Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Contact Name** and **Contact Phone** (may be either the requester or the end user).
7. The **Requested Due Date** field will default to 10 business days from date of request. The date may be changed to a later date by typing over the default date. **NOTE: IF AN EARLIER INSTALLATION DATE IS NEEDED, CONTACT TONY FERRAIOLO AT 432-2088**)
8. Click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address.
9. Type the **Floor** (01, 02, 03, B) and **Room Number**, if applicable.
10. Select the **Telephone Line Type** – Fax line-modem.
11. Enter the **Installation, Monthly, and Miscellaneous Toll Charge PTAEO**. (**Note: If the installation, monthly, and miscellaneous toll charge fees are to be charged to the same PTAEO, use the Copy button**).
12. Enter **User Comments/Installation Instructions**, if applicable.
13. Click the **Submit** button.
14. A message will display, "Is there a jack currently available for this Fax line? Click **OK** for **Yes**, **Cancel** for **No**. If **Yes** is selected, a message box will display, "Please enter the Jack Number in the box provided here." **Cancel** will bring you to the **Request Submission Confirmation** screen.
15. Print the **Request Submission Confirmation** to retain for future reference.
16. If additional **Add** telephone services requests need to be made for the same department/organization, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made, click the **Request Another**

Service button. Otherwise, return to the **Main Menu** using the **Main** Menu function button to request a service for another department/organization or **Log Out** of the tool.

Note: If an Ethernet Connection is required, select the Add Ethernet Connection button on the Request Submission Confirmation page. This will link the end user to the Add Request Details screen for Ethernet Connections. Complete the appropriate fields and submit the request. Print the Request Submission Confirmation page to retain for future reference.

Other (DSL Service, Mechanical Circuit, Emergency Phone, Area of Refuge Phone, Fiber Circuit or Residential Line, Video Conferencing, or Cable TV):

1. From the **Main Menu**, select **Request Services** under the **START Services for Departments** option.
2. Select the Department/Organization from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSOLD, FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501). **Note: The second option is the preferred method for locating an organization.**
3. From the **START** Dashboard, select the **Add** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **ADD Telephone Services** Menu, select **Telephone Services** (telephone sets and lines) and select the **Submit** button.
5. From the **ADD Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Contact Name** and **Contact Phone** (may be either the requester or the end user).
7. The **Requested Due Date** field will default to 10 business days from date of request. The date may be changed to a later date by typing over the default date. **NOTE: IF AN EARLIER INSTALLATION DATE IS NEEDED, CONTACT TONY FERRAIOLO AT 432-2088**)
8. Click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address.
9. Type the **Floor** (01, 02, 03, B) and **Room Number**, if applicable.
10. Select the **Telephone Line Type** – Other. Type the specific request in the box; i.e., DSL Service, Mechanical Circuit, Emergency Phone, Area of Refuge Phone, or Fiber Circuit or Residential Line, Video Conferencing, Cable TV).
11. Enter the **Installation, Monthly, and Miscellaneous Toll Charge PTAEO**. (**Note: If the installation, monthly, and toll charge fees are to be charged to the same PTAEO, use the Copy button**).
12. Enter **User Comments/Installation Instructions** (provide additional information such as residential address, if applicable).
13. Click the **Submit** button.
14. Print the **Request Submission Confirmation** to retain for future reference.
15. If additional **Add** telephone services requests need to be made for the same department/organization, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** Menu function button to request a service for another department/organization or **Log Out** of the tool.

Note: If an Ethernet Connection is required, select the Add Ethernet Connection button on the Request Submission Confirmation page. This will link the end user to the Add Request Details screen for Ethernet Connections. Complete the appropriate fields and submit the request. Print the Request Submission Confirmation page to retain for future reference.

Scenario 6.2: Telephone Services Change Request for a Department

Calling Cards:

1. From the **Main Menu**, select **Request Services** under the **START Services for Departments** option.
2. Select the Department/Organization from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSODL, FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501, 787001). **Note: The second option is the preferred method for locating an organization.**
3. From the **START** Dashboard, select the **Change** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **CHANGE Telephone Services** menu, select **Calling Cards** and select the **Submit** button.
5. From the **CHANGE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Enter the **Calling Card Number** in the field.
7. The **Requested Effective Date** will default to the current date. To change the **Requested Effective Date** to a later date, highlight the date and enter a new date in Oracle format; i.e., DD-MMM-YYYY.
8. Select the **Yes** radio button if changing the **PTAEO**, enter the **Current PTAEO** and then enter the **New PTAEO**.
9. If the request is to **Reassign Calling Card to a new Department**, select the **Yes** radio button. Select the **New Department** from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSODL, FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501, 787001). **Note: The second option is the preferred method for locating an organization.**
10. Enter **User Comments/Description of Service**, if applicable.
11. Click the **Submit** button.
12. Print the **Request Submission Confirmation** page to retain for future reference.
13. If additional **Change** telephone services requests need to be made for the same department/organization, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** Menu function button to request a service for another department/organization or **Log Out** of the tool.

Cell Phones:

1. From the **Main Menu**, select **Request Services** under the **START Services for Departments** option.
2. Select the Department/Organization from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSODL, FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501, 787001). **Note: The second option is the preferred method for locating an organization.**
3. From the **START** Dashboard, select the **Change** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.

4. From the **CHANGE Telephone Services** menu, select **Cell Phones** and select the **Submit** button.
5. From the **CHANGE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Enter the **Cell Phone Number** in the field.
7. Select the **Cell Phone Service Provider**.
8. Select the **Change Type**; i.e., **Monthly Charge PTAEO/User Name/Calling Plan Changes** or **Upgrade Cell Phone Model/Order new accessories**.
9. Click the **Next** button to continue.
10. If **Monthly Charge PTAEO/User Name/Calling Plan Changes** is selected, complete the appropriate section(s), as applicable.
11. The **Requested Effective Date** will default to the current date. To change the **Requested Effective Date** to a later date, highlight the date and enter a new date in Oracle format; i.e., DD-MMM-YYYY.
12. If changing the calling plan, select the **Yes** radio button (The button defaults to **No**).
13. Select the **Current Calling Plan** from the drop down list and then select the **New Calling Plan** from the drop down list.
14. If **Changing the PTAEO**, enter the **Current PTAEO** and then enter the **New PTAEO** in the required fields.
15. If changing the **Toll PTAEO**, type the **New Toll PTAEO** in the required fields.
16. If changing the Department, select the Department/Organization from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSODL, FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501, 787001). **Note: The second option is the preferred method for locating an organization.**
17. Enter **User Comments**, if applicable.
18. Click the **Submit** button.
19. Print the **Request Submission Confirmation** page to retain for future reference.
20. If **Upgrade Cell Phone Model/Order new accessories** are selected, complete the appropriate section(s), as applicable.
21. The **Requested Effective Date** will default to the current date. To change the **Requested Effective Date** to a later date, highlight the date and enter a new date in Oracle format; i.e., DD-MMM-YYYY.
22. If changing the cell phone model, select the **Yes** radio button (The button defaults to **No**)
23. Select the **New Cell Phone Model** from the drop down list.
24. If requesting **New Accessories**, select the **Yes** radio button (The button defaults to **No**) and choose the specific items.
25. Enter the **Charging PTAEO** in the required fields.
26. Enter the Shipping Address/Street Address (Address to which the cell phone and accessories will be shipped) (**NOTE: PO BOXES ARE NOT ALLOWED**). Enter floor and room numbers after the **Street Address**, if appropriate.
27. Enter **User Comments**, if applicable.
28. Click the **Submit** button.
29. Print the **Request Submission Confirmation** page to retain for future reference.
30. If additional **Change** telephone services requests need to be made for the same department/organization, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** Menu function button to request a service for another department/organization or **Log Out** of the tool.

Pagers:

1. From the **Main Menu**, select **Request Services** under the **START Services for Departments** option.
2. Select the Department/Organization from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSODL, FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501, 787001). **Note: The second option is the preferred method for locating an organization.**
3. From the **START** Dashboard, select the **Change** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **CHANGE Telephone Services** menu, select **Pagers** and select the **Submit** button.
5. From the **CHANGE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Enter the **Pager Phone Number** in the field.
7. The **Requested Effective Date** will default to the current date. To change the **Requested Effective Date** to a later date, highlight the date and enter a new date in Oracle format; i.e., DD-MMM-YYYY.
8. Select the **Yes** radio button if the request is to **Change Pager Model** (The button defaults to **No**).
9. If **Yes** was selected, enter the **Current Pager Model** from the drop down list and then enter the **New Pager Model** from the drop down list.
10. Select the **Yes** radio button if the request is to **Change Pager Number Type** (The button defaults to **No**).
11. If **Yes** was selected, enter the **Current Pager Number Type** from the drop down list and then enter the **New Pager Number Type** from the drop down list.
12. Select the **Pager Pick-up Location**.
13. Select the **Yes** radio button to **Change PTAEO** (The button defaults to **No**).
14. Type the Project, Task, and Award segments of the **Current PTAEO** in the required fields. The Organization segment will auto-populate.
15. Type the Project, Task, and Award segments of the **New PTAEO** in the required fields. The Organization segment will auto-populate. (**Note: The Organization segment may be changed by highlighting it and typing in the new Organization number**)
16. Enter **User Comments**, if applicable.
17. Click the **Submit** button.
18. Print the **Request Submission Confirmation** page to retain for future reference.
19. If additional **Change** telephone services requests need to be made for the same department/organization, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** Menu function button to request a service for another department/organization or **Log Out** of the tool.

TAN (Toll Authorization Number):

1. From the **Main Menu**, select **Request Services** under the **START Services for Departments** option.
2. Select the Department/Organization from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSODL, FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501, 787001). **Note: The second option is the preferred method for locating an organization.**
3. From the **START** Dashboard, select the **Change** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.

4. From the **CHANGE Telephone Services** menu, select **TANs** and select the **Submit** button.
5. From the **CHANGE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Enter the **TAN Number** in the field.
7. The **Requested Effective Date** will default to the current date. To change the **Requested Effective Date** to a later date, highlight the date and enter a new date in Oracle format; i.e., DD-MMM-YYYY.
8. Select the **Yes** radio button to **Change PTAEO** (The button defaults to **No**).
9. Type the Project, Task, and Award segments of the **Current PTAEO** in the required fields. The Organization segment will auto-populate.
10. Type the Project, Task, and Award segments of the **New PTAEO** in the required fields. The Organization segment will auto-populate. (**Note: The Organization segment may be changed by highlighting it and typing in the new Organization number**)
11. Select the **Yes** radio button to **Reassign TAN to a New Department** (The button defaults to **No**).
12. Select the Department/Organization from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSODL, FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501, 787001). **Note: The second option is the preferred method for locating an organization.**
13. Enter **User Comments/Description of Service**, if applicable.
14. Click the **Submit** button.
15. Print the **Request Submission Confirmation** page to retain for future reference.
16. If additional **Change** telephone services requests need to be made for the same department/organization, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main Menu** function button to request a service for another department/organization or **Log Out** of the tool.

Telephone Services (telephone sets and lines):
Phone Set Type Changes:

1. From the **Main Menu**, select **Request Services** under the **START Services for Departments** option.
2. Select the Department/Organization from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSODL, FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501, 787001). **Note: The second option is the preferred method for locating an organization.**
3. From the **START** Dashboard, select the **Change** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **CHANGE Telephone Services** Menu, select **Telephone Services** (telephone sets, lines and voicemail) and select the **Submit** button.
5. From the **CHANGE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Contact Name** and **Contact Phone** (may be either the requester or the end user).
7. Type the **Telephone Number to be changed** in the field.
8. The **Requested Effective Date** field will default to 10 business days from date of request. The date may be changed to a later date by typing over the default date **NOTE: IF AN EARLIER DUE DATE IS NEEDED, CONTACT TONY FERRAIOLO AT 432-2088**)
9. Click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number

or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address.

10. Type the **Floor** (01, 02, 03, B) and **Room Number**, if applicable.
11. Enter the **Installation Charge PTAEO** (To be charged for changing service).
12. Select the **Change Type** (Phone Set Type Changes).
13. Enter **User Comments/Installation Instructions**, if applicable.
14. Click the **Submit** button.
15. Complete the **Phone Set Type Changes** screen. Choose the **Current Set Type**; next select the **New Set Type**. Most of the questions default to **No**. If **Yes** is selected for any of the questions (Should this line "hunt" when busy to voice mail [432-8000]?; Should this line "hunt" when busy to a number other than voice mail?; If all lines are busy, should call "hunt" to voice mail?; Should calls forward no answer to voice mail [432-8000]?; Should calls forward no answer to a number other than voice mail?), type the required information..
16. Enter **User Comments**, if applicable.
17. Click the **Submit** button.
18. Print the **Request Submission Confirmation** to retain for future reference.
19. If additional **Change** telephone services requests need to be made for the same department/organization, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main Menu** function button to request a service for another department/organization or **Log Out** of the tool.

Phone Number/Line Appearance Changes:

1. From the **Main Menu**, select **Request Services** under the **START Services for Departments** option.
2. Select the Department/Organization from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSODL, FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501, 787001). **Note: The second option is the preferred method for locating an organization.**
3. From the **START** Dashboard, select the **Change** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **CHANGE Telephone Services** Menu, select **Telephone Services** (telephone sets, lines and voicemail) and select the **Submit** button.
5. From the **CHANGE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Contact Name** and **Contact Phone** (may be either the requester or the end user).
7. Type the **Telephone Number to be changed** in the field.
8. The **Requested Effective Date** field will default to 10 business days from date of request. The date may be changed to a later date by typing over the default date. **NOTE: IF AN EARLIER DUE DATE IS NEEDED, CONTACT TONY FERRAIOLO AT 432-2088**)
9. Click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address.
10. Type the **Floor** (01, 02, 03, B) and **Room Number**, if applicable.
11. Enter the **Installation Charge PTAEO** (To be charged for changing service).
12. Select the **Change Type** (Phone Number/Line Appearance Changes).

13. Enter **User Comments/Installation Instructions**, if applicable.
14. Click the **Submit** button.
15. Complete the **Phone Number/Line Appearance Changes** screen. All questions default to **No**. If **Yes** is selected for any of the questions (Change User's telephone number?; Change Existing telephone number on multi-line set?; Do you want to add numbers to this set?; Are there existing numbers that you want added to this set?; Do you want any NEW additional numbers?; Do you want to remove numbers from this set?), . type the required information.
16. Enter **User Comments**, if applicable.
17. Click the **Submit** button.
18. Print the **Request Submission Confirmation** to retain for future reference.
19. If additional **Change** telephone services requests need to be made for the same department/organization, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main Menu** function button to request a service for another department/organization or **Log Out** of the tool.

Voicemail Changes:

1. From the **Main Menu**, select **Request Services** under the **START Services for Departments** option.
2. Select the Department/Organization from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSODL, FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501, 787001). **Note: The second option is the preferred method for locating an organization.**
3. From the **START** Dashboard, select the **Change** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **CHANGE Telephone Services** Menu, select **Telephone Services** (telephone sets, lines and voicemail) and select the **Submit** button.
5. From the **CHANGE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Contact Name** and **Contact Phone** (may be either the requester or the end user).
7. Type the **Telephone Number to be changed** in the field.
8. The **Requested Effective Date** field will default to 10 business days from date of request. The date may be changed to a later date by typing over the default date. **NOTE: IF AN EARLIER INSTALLATION DATE IS NEEDED, CONTACT TONY FERRAIOLO AT 432-2088**)
9. Click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address.
10. Type the **Floor** (01, 02, 03, B) and **Room Number**, if applicable.
11. Enter the **Installation Charge PTAEO** (To be charged for changing service).
12. Select the **Change Type** (Voicemail Changes).
13. Enter **User Comments**, if applicable.
14. Click the **Submit** button.
15. Complete the **Voice mail Changes** screen. All questions default to **No**. If **Yes** is selected for any of the questions (Do you want to add Voice mail for this line?; Provide a Dial Zero phone number?; Do you want to change the Dial Zero phone number?; Do you want to remove Voice mail from this line?), type the required information. (**Note: A Dial Zero phone number allows the caller the option to dial zero to speak to a person instead of leaving a voicemail message; To reset passcode, an e-mail**

should be sent requesting the passcode resets to tmo@yale.edu and provide the new user's name).

16. Enter **User Comments/Installation Instructions**, if applicable.
17. Click the **Submit** button.
18. Print the **Request Submission Confirmation** to retain for future reference.
19. If additional **Change** telephone services requests need to be made for the same department/organization, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main Menu** function button to request a service for another department/organization or **Log Out** of the tool.

Call Pick Up Changes:

1. From the **Main Menu**, select **Request Services** under the **START Services for Departments** option.
2. Select the Department/Organization from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSODL, FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501, 787001). **Note: The second option is the preferred method for locating an organization.**
3. From the **START** Dashboard, select the **Change** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **CHANGE Telephone Services** Menu, select **Telephone Services** (telephone sets, lines and voicemail) and select the **Submit** button.
5. From the **CHANGE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Contact Name** and **Contact Phone** (may be either the requester or the end user).
7. Type the **Telephone Number to be changed** in the field.
8. The **Requested Effective Date** field will default to 10 business days from date of request. The date may be changed to a later date by typing over the default date. **NOTE: IF AN EARLIER INSTALLATION DATE IS NEEDED, CONTACT TONY FERRAIOLO AT 432-2088**)
9. Click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address.
10. Type the **Floor** (01, 02, 03, B) and **Room Number**, if applicable.
11. Enter the **Installation Charge PTAEO** (To be charged for changing service).
12. Select the **Change Type** (Call Pick Up Changes).
13. Enter **User Comments/Installation Instructions**, if applicable.
14. Click the **Submit** button.
15. Complete the **Call Pick-up Changes** screen. All questions default to **No**. If **Yes** is selected for any of the questions (Do you want to add Call Pick-up for this line?; Do you want to remove this line from Call Pick-up?; Do you want to Create a new Call Pick-up group?; Do you want to remove Call Pick-up from a group?), type the required information..
16. Enter **User Comments**, if applicable.
17. Click the **Submit** button.
18. Print the **Request Submission Confirmation** to retain for future reference.
19. If additional **Change** telephone services requests need to be made for the same department/organization, scroll down, select the appropriate radio button, and click the **Copy Request**

button. If another access/services request needs to be made, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main Menu** function button to request a service for another department/organization or **Log Out** of the tool.

Call Forwarding Changes (hunt when busy, forward no answer):

1. From the **Main Menu**, select **Request Services** under the **START Services for Departments** option.
2. Select the Department/Organization from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSODL, FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501, 787001). **Note: The second option is the preferred method for locating an organization.**
3. From the **START** Dashboard, select the **Change** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **CHANGE Telephone Services** Menu, select **Telephone Services** (telephone sets, lines and voicemail) and select the **Submit** button.
5. From the **CHANGE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Contact Name** and **Contact Phone** (may be either the requester or the end user).
7. Type the **Telephone Number to be changed** in the field.
8. The **Requested Effective Date** field will default to 10 business days from date of request. The date may be changed to a later date by typing over the default date. **NOTE: IF AN EARLIER INSTALLATION DATE IS NEEDED, CONTACT TONY FERRAIOLO AT 432-2088**)
9. Click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address.
10. Type the **Floor** (01, 02, 03, B) and **Room Number**, if applicable.
11. Enter the **Installation Charge PTAEO** (To be charged for changing service).
12. Select the **Change Type** (Call Forwarding Changes [hunt when busy, forward no answer]).
13. Enter **User Comments/Installation Instructions**, if applicable.
14. Click the **Submit** button.
15. Complete the **Call Forwarding Changes** screen. Most of the questions default to **No**. If **Yes** is selected for any of the questions (Should this line "hunt" when busy to voice mail [432-8000]?; Should this line "hunt" when busy to a number other than voice mail?; Should calls forward no answer to voice mail [432-8000]?; Should calls forward no answer to a number other than voice mail?; Remove "hunt" when busy?; Remove forward when no answer?), type the required information.
16. Enter **User Comments**, if applicable.
17. Click the **Submit** button.
18. Print the **Request Submission Confirmation** to retain for future reference.
19. If additional **Change** telephone services requests need to be made for the same department/organization, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main Menu** function button to request a service for another department/organization or **Log Out** of the tool.

PTAEO/User Name Changes:

1. From the **Main Menu**, select **Request Services** under the **START Services for Departments** option.

2. Select the Department/Organization from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSODL, FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501, 787001). **Note: The second option is the preferred method for locating an organization.**
3. From the **START** Dashboard, select the **Change** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **CHANGE Telephone Services** Menu, select **Telephone Services** (telephone sets, lines and voicemail) and select the **Submit** button.
5. From the **CHANGE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Contact Name** and **Contact Phone** (may be either the requester or the end user).
7. Type the **Telephone Number to be changed** in the field.
8. The **Requested Effective Date** field will default to 10 business days from date of request. The date may be changed to a later date by typing over the default date. (**NOTE: IF AN EARLIER INSTALLATION DATE IS NEEDED, CONTACT TONY FERRAIOLO AT 432-2088**)
9. Click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address.
10. Type the **Floor** (01, 02, 03, B) and **Room Number**, if applicable.
11. Enter the **Installation Charge PTAEO**.
12. Select the **Change Type** (PTAEO/User Name Changes).
13. Enter **User Comments/Installation Instructions**, if applicable.
14. Click the **Submit** button.
15. Complete the **PTAEO/User Name Changes** screen. All questions default to **No**. If **Yes** is selected for any of the questions (New PTAEO for monthly charging?; New PTAEO for miscellaneous toll charging?; Change Department?), type the required information. Enter the segments of the PTAEO as indicated. To change the Department, select the Department/Organization from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSODL, FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501, 787001). **Note: The second option is the preferred method for locating an organization.**

(NOTE: PLEASE USE THE LIBERTY RESPONSE SPREADSHEET FOR "MASS" UPDATES AT HTTP://RISIMGW1.ITS.YALE.EDU.)

16. Enter **User Comments**, if applicable.
17. Click the **Submit** button.
18. Print the **Request Submission Confirmation** to retain for future reference.
19. If additional **Change** telephone services requests need to be made for the same department/organization, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main Menu** function button to request a service for another department/organization or **Log Out** of the tool.

Phone Set Moves:

1. From the **Main Menu**, select **Request Services** under the **START Services for Departments** option.
2. Select the Department/Organization from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSODL,

FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501, 787001). **Note: The second option is the preferred method for locating an organization.**

3. From the **START** Dashboard, select the **Change** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **CHANGE Telephone Services** Menu, select **Telephone Services** (telephone sets, lines and voicemail) and select the **Submit** button.
5. From the **CHANGE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Contact Name** and **Contact Phone** (may be either the requester or the end user).
7. Type the **Telephone Number to be changed** in the field.
8. The **Requested Effective Date** field will default to 10 business days from date of request. The date may be changed to a later date by typing over the default date. **NOTE: IF AN EARLIER INSTALLATION DATE IS NEEDED, CONTACT TONY FERRAIOLO AT 432-2088**)
9. Click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address.
10. Type the **Floor** (01, 02, 03, B) and **Room Number**, if applicable.
11. Enter the **Installation Charge PTAEO** (To be charged for changing service).
12. Select the **Change Type** (Phone Set Moves).
13. Enter **User Comments/Installation Instructions**, if applicable.
14. Click the **Submit** button.
15. Complete the **Move Phone Set to a New Location** screen. If the phone set is being moved to a new location, click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address. There is one question that defaults to **No**. If **Yes** is selected for the question (Is there a jack currently available?), type the required information.
16. Enter **User Comments**, if applicable.
17. Click the **Submit** button.
18. Print the **Request Submission Confirmation** to retain for future reference.
19. If additional **Change** telephone services requests need to be made for the same department/organization, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main Menu** function button to request a service for another department/organization or **Log Out** of the tool.

Scenario 6.3: Telephone Services Delete Request for a Department

Calling Cards:

1. From the **Main Menu**, select **Request Services** under the **START Services for Departments** option.
2. Select the Department/Organization from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSODL, FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501, 787001). **Note: The second option is the preferred method for locating an organization.**

3. From the **START** Dashboard, select the **Delete** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **DELETE Telephone Services** menu, select **Calling Cards** and select the **Submit** button.
5. From the **DELETE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Calling Card Number** in the field.
7. Type the **Current PTAEO** in the required fields.
8. Enter **User Comments/Description of Service**, if applicable.
9. Click the **Submit** button.
10. Print the **Request Submission Confirmation** page to retain for future reference.
11. If additional **Delete** telephone services requests need to be made for the same department/organization, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** Menu function button to request a service for another department/organization or **Log Out** of the tool.

Cell Phones:

1. From the **Main Menu**, select **Request Services** under the **START Services for Departments** option.
2. Select the Department/Organization from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSODL, FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501, 787001). **Note: The second option is the preferred method for locating an organization.**
3. From the **START** Dashboard, select the **Delete** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **DELETE Telephone Services** menu, select **Cell Phones** and select the **Submit** button.
5. From the **DELETE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Cell Phone Number** in the field.
7. Select the **Cell Phone Service Provider**.
8. Enter the **Monthly Charge PTAEO**.
9. Enter **User Comments**, if applicable.
10. Click the **Submit** button.
11. Print the **Request Submission Confirmation** page to retain for future reference.
12. If additional **Delete** telephone services requests need to be made for the same department/organization, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** Menu function button to request a service for another department/organization or **Log Out** of the tool.

Pagers:

1. From the **Main Menu**, select **Request Services** under the **START Services for Departments** option.
2. Select the Department/Organization from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSODL, FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501, 787001). **Note: The second option is the preferred method for locating an organization.**

3. From the **START** Dashboard, select the **Delete** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **DELETE Telephone Services** menu, select **Pagers** and select the **Submit** button.
5. From the **DELETE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Enter the **Pager Phone Number** in the field.
7. The **Date to End Service** field defaults to the current date. To change the **Date to End Service** to a later date, highlight the date and enter a new date in Oracle format; i.e., DD-MMM-YYYY.
8. Select the **Pager Drop-off Location**. (**NOTE: THE PAGER MUST BE RETURNED TO ONE OF THE LOCATIONS. BILLING WILL NOT STOP UNTIL THE PAGER IS RETURNED**.)
9. Enter the **Monthly Charge PTAEO**.
10. Enter **User Comments**, if applicable.
11. Click the **Submit** button.
12. Print the **Request Submission Confirmation** page to retain for future reference.
13. If additional **Delete** telephone services requests need to be made for the same department/organization, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** Menu function button to request a service for another department/organization or **Log Out** of the tool.

TAN (Toll Authorization Number):

1. From the **Main Menu**, select **Request Services** under the **START Services for Departments** option.
2. Select the Department/Organization from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSODL, FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501, 787001). **Note: The second option is the preferred method for locating an organization.**
3. From the **START** Dashboard, select the **Delete** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **DELETE Telephone Services** menu, select **TANs** and select the **Submit** button.
5. From the **DELETE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Enter the **TAN Number** in the field.
7. The **Requested End Date** defaults to the current date. To change the **Requested End Date** to a later date, highlight the date and enter a new date in Oracle format; i.e., DD-MMM-YYYY.
8. Enter the **Current PTAEO**.
9. Enter **User Comments/Description of Service**, if applicable.
10. Click the **Submit** button.
11. Print the **Request Submission Confirmation** page to retain for future reference.
12. If additional **Delete** telephone services requests need to be made for the same department/organization, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** Menu function button to request a service for another department/organization or **Log Out** of the tool.

Telephone Services (telephone sets and lines):
Single Line Details:

1. From the **Main Menu**, select **Request Services** under the **START Services for Departments** option.
2. Select the Department/Organization from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSODL, FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501, 787001). **Note: The second option is the preferred method for locating an organization.**
3. From the **START** Dashboard, select the **Delete** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **DELETE Telephone Services** Menu, select **Telephone Services** (telephone sets and lines) and select the **Submit** button.
5. From the **DELETE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Contact Name** and **Contact Phone** (may be either the requester or the end user).
7. Enter the **Telephone number to be deleted** in the field.
8. The **Requested End Date** field will default to 10 business days from date of request. The date may be changed to a later date by typing over the default date. . (**NOTE: IF AN EARLIER DELETION DATE IS NEEDED, CONTACT TONY FERRAIOLO AT 432-2088**)
9. Click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address.
10. Type the **Floor** (01, 02, 03, B) and **Room Number**, if applicable.
11. Select the **Telephone Line Type** – Single Line.
12. Enter the **Monthly Charge PTAEO**.
13. Enter **User Comments/Installation Instructions**, if applicable.
14. Click the **Submit** button.
15. Print the **Request Submission Confirmation** to retain for future reference.
16. If additional **Delete** telephone services requests need to be made for the same department/organization, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** Menu function button to request a service for another department/organization or **Log Out** of the tool.

Multi Line Details:

1. From the **Main Menu**, select **Request Services** under the **START Services for Departments** option.
2. Select the Department/Organization from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSODL, FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501, 787001). **Note: The second option is the preferred method for locating an organization.**
3. From the **START** Dashboard, select the **Delete** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **DELETE Telephone Services** Menu, select **Telephone Services** (telephone sets and lines) and select the **Submit** button.

5. From the **DELETE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Contact Name** and **Contact Phone** (may be either the requester or the end user).
7. Enter the **Telephone number to be deleted** in the field.
8. The **Requested End Date** field will default to 10 business days from date of request. The date may be changed to a later date by typing over the default date. . (**NOTE: IF AN EARLIER DELETION DATE IS NEEDED, CONTACT TONY FERRAIOLO AT 432-2088**)
9. Click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address.
10. Type the **Floor** (01, 02, 03, B) and **Room Number**, if applicable.
11. Select the **Telephone Line Type** – Multi Line.
12. Enter the **Monthly Charge PTAEO**.
13. Enter **User Comments/Installation Instructions**, if applicable.
14. Click the **Submit** button.
15. Print the **Request Submission Confirmation** to retain for future reference.
16. If additional **Delete** telephone services requests need to be made for the same department/organization, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** Menu function button to request a service for another department/organization or **Log Out** of the tool.

Fax/Modem Line Details:

1. From the **Main Menu**, select **Request Services** under the **START Services for Departments** option.
2. Select the Department/Organization from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSODL, FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501, 787001). **Note: The second option is the preferred method for locating an organization.**
3. From the **START** Dashboard, select the **Delete** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **DELETE Telephone Services** Menu, select **Telephone Services** (telephone sets and lines) and select the **Submit** button.
5. From the **DELETE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Contact Name** and **Contact Phone** (may be either the requester or the end user).
7. Enter the **Telephone number to be Deleted** in the field.
8. The **Requested End Date** field will default to 10 business days from date of request. The date may be changed to a later date by typing over the default date. . (**NOTE: IF AN EARLIER DELETION DATE IS NEEDED, CONTACT TONY FERRAIOLO AT 432-2088**)
9. Click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address.
10. Type the **Floor** (01, 02, 03, B) and **Room Number**, if applicable.

11. Select the **Telephone Line Type** – Fax Line-Modem.
12. Enter the **Monthly Charge PTAEO**.
13. Enter **User Comments/Installation Instructions**, if applicable.
14. Click the **Submit** button.
15. Print the **Request Submission Confirmation** to retain for future reference.
16. If additional **Delete** telephone services requests need to be made for the same department/organization, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** Menu function button to request a service for another department/organization or **Log Out** of the tool.

Other (DSL Service, Mechanical Circuit, Emergency Phone, Area of Refuge Phone, Fiber Circuit or Residential Line, Video Conferencing, or Cable TV):

1. From the **Main Menu**, select **Request Services** under the **START Services for Departments** option.
2. Select the Department/Organization from the List of Values (**LOV**). Use either the search method "**Organization Name**" "**Contains**" and type the short organization name (FINADM, HRSODL, FESADM) or use "**Organization Unit Code**" "**Is**" and type the organization number (974501, 787001). **Note: The second option is the preferred method for locating an organization.**
3. From the **START** Dashboard, select the **Delete** radio button for **Telephone Services**, scroll to the bottom and select the **Submit** button.
4. From the **DELETE Telephone Services** Menu, select **Telephone Services** (telephone sets and lines) and select the **Submit** button.
5. From the **DELETE Request Details** screen, select the **Business Manager/Approver** from the drop down list. The **Business Manager Phone** will auto-populate.
6. Type the **Contact Name** and **Contact Phone** (may be either the requester or the end user).
7. Enter the **Telephone number to be Deleted** in the field.
8. The **Requested End Date** field will default to 10 business days from date of request. The date may be changed to a later date by typing over the default date. . (**NOTE: IF AN EARLIER DELETION DATE IS NEEDED, CONTACT TONY FERRAIOLO AT 432-2088**)
9. Click the List of Values button (**LOV**) to select the **Building Name/Street Address**. To locate the appropriate building/address, use the format "**Street Address**" "**Contains**" and type either the number or name of the street (205, 155, 2 or Whitney, Prospect, Hillhouse) and click the **Find** button. Select the address.
10. Type the **Floor** (01, 02, 03, B) and **Room Number**, if applicable.
11. Select the **Telephone Line Type** – Other. Type the specific request in the box; i.e., DSL Service, Mechanical Circuit, Emergency Phone, Area of Refuge Phone, or Fiber Circuit or Residential Line, Video Conferencing, Cable TV).
12. Enter the **Monthly Charge PTAEO**.
13. Enter **User Comments/Installation Instructions** (provide additional information such as residential address, if applicable).
14. Click the **Submit** button.
15. Print the **Request Submission Confirmation** to retain for future reference.

16. If additional **Delete** telephone services requests need to be made for the same department/organization, scroll down, select the appropriate radio button, and click the **Copy Request** button. If another access/services request needs to be made, click the **Request Another Service** button. Otherwise, return to the **Main Menu** using the **Main** Menu function button to request a service for another department/organization or **Log Out** of the tool.

Appendix A

Glossary of Terms and Acronyns:

Terms/Acronyms	Description
Single line Set	The single line set has one single line, a flash button and a voice mail message waiting light
Single line Set Fee	The set cost is included in the $14.50 basic telephone service monthly charge
Multi line Set- 3903	The M3903 has two Programmable Line/Feature keys (Self-labeled) with two features or lines configured on each key. The Shift key allows the user to access the second layer of the Programmable Line/Feature keys. It also has four Context Sensitive (Self-labeled) Soft keys
3903 Set Upgrade Fee	$10.00 monthly charge (plus $14.50 per month basic telephone service and $8.50 per month for each additional line appearance
Multi line Set – 3904	The M3904 has six Programmable Line/Feature keys (Self-labeled) with two features or lines configured on each key. The Shift key allows the user to access the second layer of the Programmable Line/Feature keys. It also has four Context Sensitive (Self-labeled) Soft keys
3904 Set Upgrade Fee	$15.00 monthly charge (plus $14.50 per month basic telephone service and $8.50 per month for each additional line appearance
Fax line – modem	$14.50 per month basic telephone service
Other	Choose **Other** to request the following services: **Area of Refuge Phone**: A telephone located at strategic areas in buildings to provide telephone access during an emergency situation **Cable TV**: Cable television **Dial up line**: A telephone line connected to either a fire alarm, burglar alarm, or security alarm equipment that dials a pre-programmed number **DSL Service**: Digital Subscriber Line (DSL) technology provides Internet and network access faster than a 28.8Kbps modem on a standard analog phone line. DSL Internet Service sends data and voice over the same line, so that the user may talk on the phone while connected to the Internet **Emergency Phone**: A “blue light” telephone located in strategic outside areas to provide one-touch telephone access to the Yale Police Department

	Fiber Circuit: Fiber Optic Circuit terminated in a fiber hub used to provide individual Ethernet connections **Mechanical Circuit**: A point-to-point circuit that monitors equipment, such as a fire alarm, burglar alarm, or building HVAC. It does not have a telephone number **Power Failure Telephone**: Power Failure Telephones derive their dial tone directly from SNET and calls may be made from them in addition to receiving calls. These telephones also will work when Yale's telephone system is operable. **Residential Line**: A telephone line for a Yale employee's residence **Video Conferencing**: Interactive video that connects participants to one or more remote locations
Call Pickup	Allows the user to pick up a call from any telephone in the same Pickup Group
Call Forward, No Answer	Directs calls to ring to either voice mail or another telephone number after four rings
Hunt when busy	Directs calls to ring to either voice mail or another telephone number when a line is busy
Miscellaneous Toll Charge	A PTAEO used to bill third-party, collect, or direct dial calls (for telephone lines that do not prompt caller for a TAN)
Installation Charge PTAEO	A PTAEO used to bill for one-time charges such as a technician's labor, materials, setup fees and/or software fees

Appendix B

Useful URLs, E-mail Addresses, and Phone Numbers:

URLs

ITS Telecommunications web site	http://www.yale.edu/telecom
ITS Administrative Systems User Access	http://www.yale.edu/access
Systems & Technology Access Request Tool	http://www.yale.edu/start

E-mail Addresses

Telecommunications Management Office (Telephone set & line requests)	tmo@yale.edu
Tony Ferraiolo, TMO Supervisor (Telephone set & line requests)	anthony.ferraiolo@yale.edu
Telecom Administration (TAN, Pager, & Cell Phone requests)	telecom@yale.edu

Phone Numbers

Central Campus Help Desk	432-9000
Stephanie Bennett, Supervisor (TAN & Pager requests)	436-4054
Andrea Capelli, System Coordinator (Cell Phone requests)	432-6987
Tony Ferraiolo, TMO Supervisor (Telephone set & line requests)	432-2088