

# Telecommunications Coordinators

## Guide to EMS Inquiry

### Summary

This document explains the procedures that need to be completed in order to process requests using the Expense Management System (EMS11). EMS11 is a web-based product of Symphony Services. It replaces the Stonehouse MONIES mainframe application.

### Terms:

- **Requests** is the term for Orders, a Request is the General Information (GI) portion of the Order.
- **SR** or **Service Request** is the term for Order Segments
- **Cost Center** is the term for Accounting Unit (AU). The Cost Center is now case sensitive.
- **Charge Category** - Allocation Code
- **Primary Location Code** - From Location Code
- **Secondary Location Code** -To Location Code
- **Service Catalogs** – Primary Catalog Code
- **Agency Control number** – Custom GI Field

### Navigation Buttons:

Listed below are the navigation buttons and their definitions:

-  **Query button** searches for and selects the relevant data. Unlike the arrow, you cannot type the first letter and have a list appear. The drop down must be used for selection.
-  **Edit button** is used to expand the different portions of EMS so that information can be obtained or work can be completed. This button is located throughout the system at the top of each portion title.
-  **Drop down button** pulls from an existing file. If the first digit is typed in, all items starting with that will pull up, if the first two digits are typed in will bring up everything starting with the first two digits, etc.
-  **View button** to view and edit the details of the selected data.
-  **Calendar button** can be used to pull up a calendar, or the date can be entered (mm/dd/yyyy).
-  **Clear button**, clears the data previously selected in the box next to it.
- **Ignore Case** field helps with the speed the system performs a query search. Needs to be checked to search on upper case items.
-  **Go to the previous record**
-  **Go to the next record**
-  **Go to the beginning of the file**
-  **Go to the end of the file.**
- A **red “x”** (✖) means that field is required before you save the record.
- A **blue arrow** (↕) means that field is required before you finalize the Request.
- **Home** » **Requests List** » **Requests** these are page location designators located at top right and lower left side of page(s)
- **Menu Bar** (located on right side of screen) Quick link to reports and web sites

- A **Hyperlink** is a word, phrase, or image (  ) that can be clicked on to jump to a new document or a new section within the current document. Text hyperlinks are often blue and underlined, but don't have to be. When the cursor is moved over a hyperlink, whether it is text or an image, the arrow should change to a small hand point at the line. When clicked, a new page or place in the current page will open.

## STANDARD FUNCTIONALITY

**Important NOTE: EMS11 is case sensitive; all entry should be in Upper Case.**

### Folders

The words across the top of the screen (black letters or a blue bar) represent “Folders” or areas of functionality in the system that the user has access to. Provisioning has access to the following folders.

- **Admin** – To change password
- **Billing** – Perform manual billing.
- **Call Costing** – To set of new switches and review existing.
- **Inventory** – Inquiry into the Inventory module.
- **Reports** – Access to the Reports module, where the user can create his/her own reports.
- **Requests** – Update into the Request module, formerly know in MONIES as the Order module.
- **Tables** - Inquiry into the Location, Cost Center (AU), Catalog, Vendor, and Personnel Tables.

### Drop Down Links

Drop down lists are indicated with a down arrow at the end of the field. The user may only choose from the drop down list to populate the field. The list is based on data in a table that has been entered either via the application (cost centers, vendors, charge categories).

- If the data is extensive (Cost Center, Personnel), the first drop down list will be a choice of ranges. Once a range of data is selected, the drop down list will be refreshed with the data that is contained within the range selected.

### Paper/Magnify Glass Emblem

Paper/Pen emblem at the end of a field indicate the user must use this drop-down to get the appropriate data for the field.

- For example, the Analysis field on the Request Entry screen contains a question mark at the end of the field. When the question mark is selected, a pop-up window appears for the Personnel File. Once a name selected, it is returned to the field on the previous screen.

### Column/Lists

Any column with a column heading that is underscored may sort lists provided in the system. The sort will always be ascending numeric-alpha. If the list is long enough for more than one page, left and right pointing arrows will appear above the list.

- The number of pages in the list and the page appearing will be indicated in the top left (Page N of N).
- Double arrows, when selected, jump to the beginning or end of the list, respectively.
- Single arrows will move forward or back, respectively, one page of the list.

### Clear Command

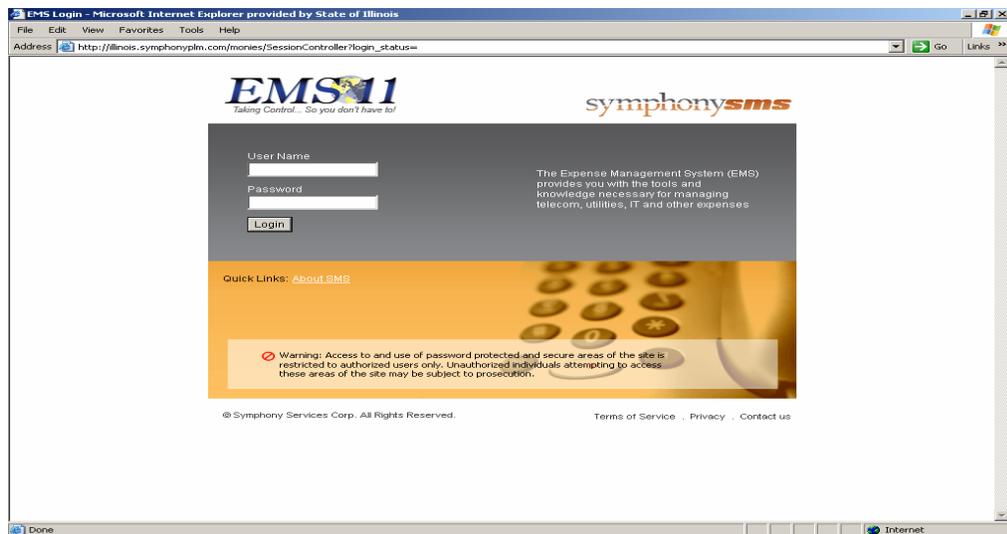
The Garbage Can at the end of a row in a list, if selected, will delete the entry in the list. The user will be presented with a verification pop-up window before the entry is deleted.

### Page Location Designators OR “Back” Button

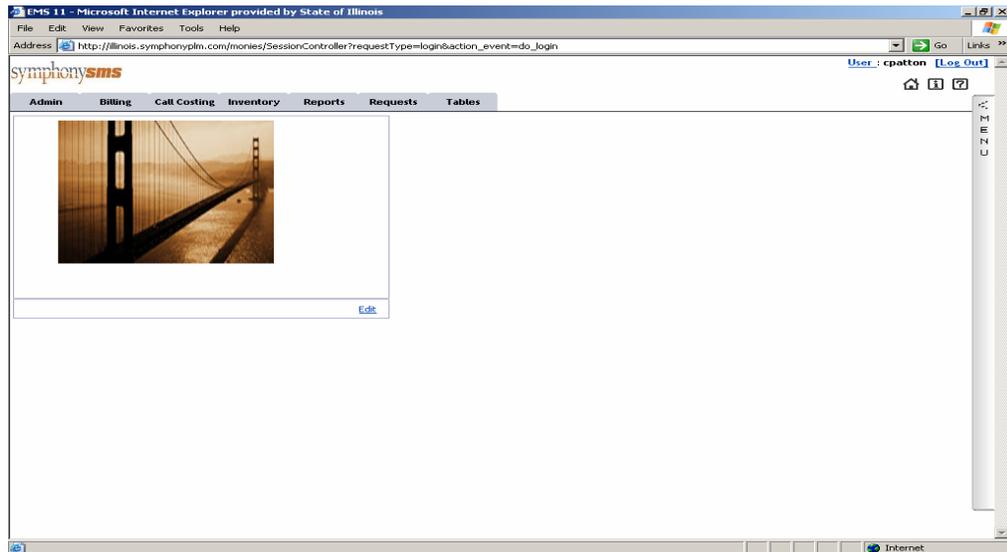
The “page location designators hyperlinks within the application should be used to travel backward. **The back button for IE (Internet Explorer - the left pointing arrow in the top left corner) should NEVER be used.**

## Accessing and Exiting EMS11

1. Accessing the application:
  - a. Open Windows Internet Explorer (IE), the application cannot be used via Netscape.
  - b. Enter the URL **http://illinois.symphonyplm.com/monies/**
  - c. When the Home page is presented enter your user id and password.
    - If you do not have a user id and password, see your immediate supervisor.
    - ID’s and passwords are case sensitive.
    - If the Home page does not appear, see the EMS11 system administrator.



2. Exiting the application
  - a. Click on the **Log Out** Button that appears in the top right corner of the screen.
  - b. Logging out can be done from any screen with the Log Out Button, however the system will not prompt a save nor will it save the work done.
  - c. Save any data entered and/or changes made before logging out.



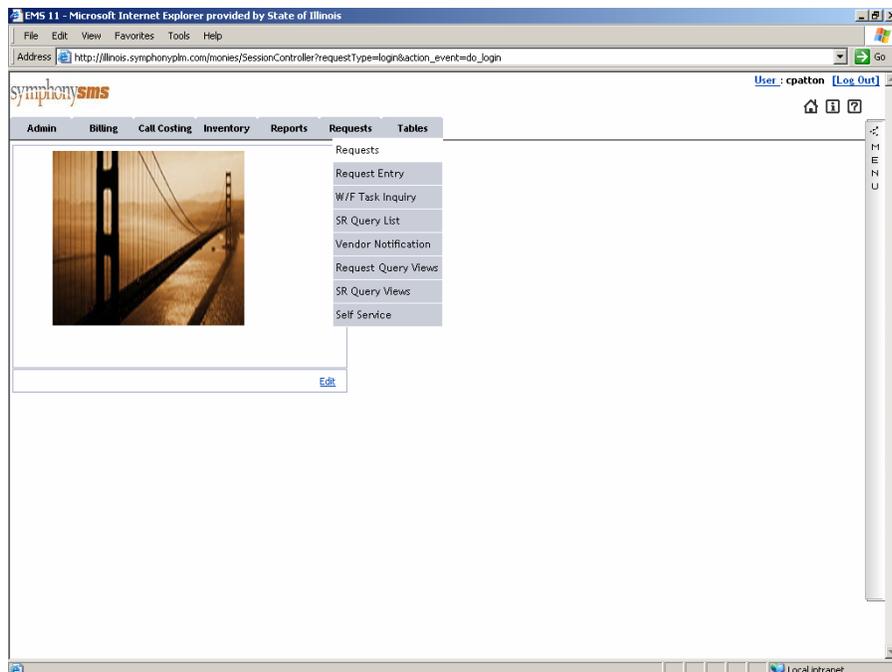
## Inquiring on Request in EMS11

The Request menu drop-down is used to inquire on request and service request along with other items. A Request can contain many Service Requests (SR) pertaining to equipment and services. An SR can perform various functions for equipment or services that will be updated in the Inventory file such as install, disable, number change, relocate, change, reinstate, and so on. The SR is what was called a segment in MONIES.

**To inquire on details of a request follow the steps listed below:**

**Step 1** Click on the **Requests** menu item.

**Step 2** In the **Requests** drop-down that appears, click on the **Request** option.



Request List will appear. Only those orders that are active will appear. To see all orders un-check "Active Only". Page will refresh and show all orders.

EMS 11 - Microsoft Internet Explorer provided by State of Illinois

Address: http://illinois.symphonypm.com/monies/SessionController?requestType=login&action\_event=do\_login

User: cpattton [Log Out]

Admin Billing Call Costing Inventory Reports Requests Tables

Home >> Requests List

Requests

Create View Select View Go Edit View

Select Where  Not  Analyst First Name - request FROM TO From To Ignore Case Go Clear More

Requests List

Active Only:  Display Request Template:

Record 1-50 of 1818

Request Number	Requestor	Status	Approval Status	Requested Due	Confirmed Due	Analyst	Project	# SR	Priority
2	CANNON, NORMA	Sent To Vendor		12/09/2004	12/09/2004	LECHOWSKI, TIM	CMCT054398	0	Low
3	CANNON, NORMA	Sent To Vendor		12/09/2004	12/09/2004	LECHOWSKI, TIM	CMCT054400	0	Low
4	FLEISCHACKER, KAREN	Active		12/17/2004	12/17/2004	BURCHETT, VERN	CMCT054411	0	Low
5	PATTERSON, JOE	Sent To Vendor		09/23/2005	09/23/2005	PATTERSON, JOE		0	Low
7	SHARLE, THERESE	Active		09/30/2007	09/30/2007	STOUTAMYER, LYN		0	Low
8	HALEY, ROBERT	Active		09/30/2007	09/30/2007	STOUTAMYER, LYN		0	Low
9	CAPELLIN, LORI	On Hold		12/01/2006	12/01/2006	CAPELLIN, LORI		0	Low
10	HENDRICKS, BETSY	Sent To Vendor		12/31/2006		BRINKLEY, GENE	BRIAN\DOC	0	Low
13	DELOACH, LINDA	Active		04/07/2006	04/07/2006	LECHOWSKI, TIM	RENEWAL GOV CON	0	Low
14	MORITZ, LARRY	Active		04/05/2006	04/05/2006	PATTERSON, JOE	NEW C.A. PC	0	Low
15	FREIMUTH, RICHARD	Active		05/19/2006	05/19/2006	FREIMUTH, RICHARD	ADD TO CLAR	0	Low
16	TYLER, LOLITA	Active		08/01/2007	08/01/2007	STOUTAMYER, LYN		0	Low
17	STOUTAMYER, LYN	Active		06/30/2006	06/30/2006	STOUTAMYER, LYN		0	Low
18	PATTERSON, JOE	Active		07/18/2006	07/18/2006	PATTERSON, JOE	PRI CARD IN EKS	0	Low
20	HOWARD, JENNIFER	Active		06/01/2007	06/01/2007	STOUTAMYER, LYN		1	Low
21	STOUTAMYER, LYN	Active		06/30/2007	06/30/2007	STOUTAMYER, LYN		0	Low
22	PRATT, TONIA	Sent To Vendor		12/06/2007	08/03/2006	BECKMAN, MICHAEL	CMCT818610	62	Low
23	PATTERSON, JOE	Sent To Vendor		08/18/2006	08/18/2006	PATTERSON, JOE	NEW LOC	0	Low
24	BECKMAN, MICHAEL	Active		03/01/2007	03/01/2007	BECKMAN, MICHAEL	CIC7205110	0	Low
30	GILLONO, BARB	Sent To Vendor		08/08/2007	09/28/2007	MOSS, ELLEN	NEW PAY PHONES	4	Low
33	WILLOUGHBY, BRUCE	Active		06/10/2007	06/10/2007	STOUTAMYER, LYN		0	Low
42	LANGIANO, ANGIE	Active		11/27/2006	11/27/2006	FREIMUTH, RICHARD	CS5/11/28/06 GB	0	Low
52	WARD, TIM	Active		12/07/2006	12/07/2006	Default, Default		0	Low
53	BECKMAN, MICHAEL	Active		12/04/2006	12/04/2006	BECKMAN, MICHAEL	CELL BASE& TERM	0	Low

EMS allows you to search on a variety of items. Go to the pull down associated with the Select Where field and select your search criteria.

**NOTE: Remember to place a check mark in the "Ignore Case" box.**

EMS 11 - Microsoft Internet Explorer provided by State of Illinois

Address: http://illinois.symphonypm.com/monies/SessionController?requestType=login&action\_event=do\_login

User: cpattton [Log Out]

Admin Billing Call Costing Inventory Reports Requests Tables

Select Where  Not  Ignore Case Go Clear More

Requests List

Active Only:  Display Request Template:

Record 1-50 of 1818

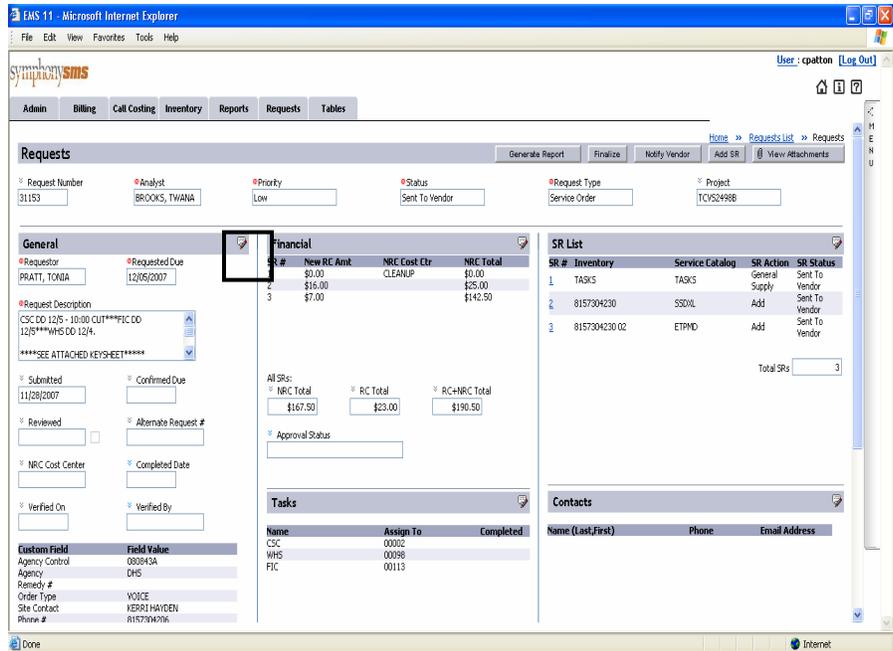
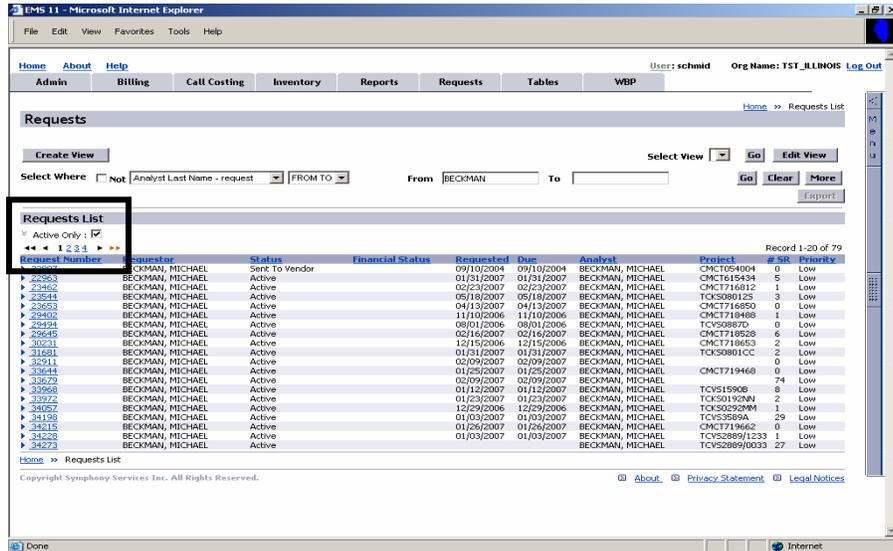
Request Number	Requestor	Status	Approval Status	Requested Due	Confirmed Due	Analyst	Project	# SR	Priority
2	CA	Cost Center - serv req	endor	12/09/2004	12/09/2004	LECHOWSKI, TIM	CMCT054398	0	Low
3	CA	Custom Field	endor	12/09/2004	12/09/2004	LECHOWSKI, TIM	CMCT054400	0	Low
4	CA	Custom SR Field		12/17/2004	12/17/2004	BURCHETT, VERN	CMCT054411	0	Low
5	PA	Date Completed - request	endor	09/23/2005	09/23/2005	PATTERSON, JOE		0	Low
7	SR	Date Completed - serv req		09/30/2007	09/30/2007	STOUTAMYER, LYN		0	Low
8	HALEY, ROBERT	Active		09/30/2007	09/30/2007	STOUTAMYER, LYN		0	Low
9	CAPELLIN, LORI	On Hold		12/01/2006	12/01/2006	CAPELLIN, LORI		0	Low
10	HENDRICKS, BETSY	Sent To Vendor		12/31/2006		BRINKLEY, GENE	BRIAN\DOC	0	Low
13	DELOACH, LINDA	Active		04/07/2006	04/07/2006	LECHOWSKI, TIM	RENEWAL GOV CON	0	Low
14	MORITZ, LARRY	Active		04/05/2006	04/05/2006	PATTERSON, JOE	NEW C.A. PC	0	Low
15	FREIMUTH, RICHARD	Active		05/19/2006	05/19/2006	FREIMUTH, RICHARD	ADD TO CLAR	0	Low
16	TYLER, LOLITA	Active		08/01/2007	08/01/2007	STOUTAMYER, LYN		0	Low
17	STOUTAMYER, LYN	Active		06/30/2006	06/30/2006	STOUTAMYER, LYN		0	Low
18	PATTERSON, JOE	Active		07/18/2006	07/18/2006	PATTERSON, JOE	PRI CARD IN EKS	0	Low
20	HOWARD, JENNIFER	Active		06/01/2007	06/01/2007	STOUTAMYER, LYN		1	Low
21	STOUTAMYER, LYN	Active		06/30/2007	06/30/2007	STOUTAMYER, LYN		0	Low
22	PRATT, TONIA	Sent To Vendor		12/06/2007	08/03/2006	BECKMAN, MICHAEL	CMCT818610	62	Low
23	PATTERSON, JOE	Sent To Vendor		08/18/2006	08/18/2006	PATTERSON, JOE	NEW LOC	0	Low
24	BECKMAN, MICHAEL	Active		03/01/2007	03/01/2007	BECKMAN, MICHAEL	CIC7205110	0	Low
30	GILLONO, BARB	Sent To Vendor		08/08/2007	09/28/2007	MOSS, ELLEN	NEW PAY PHONES	4	Low
33	WILLOUGHBY, BRUCE	Active		06/10/2007	06/10/2007	STOUTAMYER, LYN		0	Low
42	LANGIANO, ANGIE	Active		11/27/2006	11/27/2006	FREIMUTH, RICHARD	CS5/11/28/06 GB	0	Low
52	WARD, TIM	Active		12/07/2006	12/07/2006	Default, Default		0	Low
53	BECKMAN, MICHAEL	Active		12/04/2006	12/04/2006	BECKMAN, MICHAEL	CELL BASE& TERM	0	Low
55	LEWIS, WALT	Active		04/01/2007	04/01/2007	STOUTAMYER, LYN		0	Low
56	KAYLOR, KAREN	Active		06/30/2007	06/30/2007	STOUTAMYER, LYN	VIDEO	0	Low
58	PATTERSON, JOE	Active		12/15/2006	12/15/2006	PATTERSON, JOE	SITE CLOSING	16	Low
62	DENNIS, SHARON	Active		12/27/2006	12/27/2006	DENNIS, SHARON	CALL DETAIL	0	Low
65	STOUTAMYER, LYN	Active		06/30/2007	06/30/2007	STOUTAMYER, LYN		0	Low
70	STOUTAMYER, LYN	Active		06/30/2007	06/30/2007	STOUTAMYER, LYN		0	Low

Place information in the "From" field and the "To" field (if necessary) this will give you a range and hit go.

**NOTE: You may search on multiple criteria items by clicking on the "More" button. There is no limit to the number of criteria you can search on in EMS.**

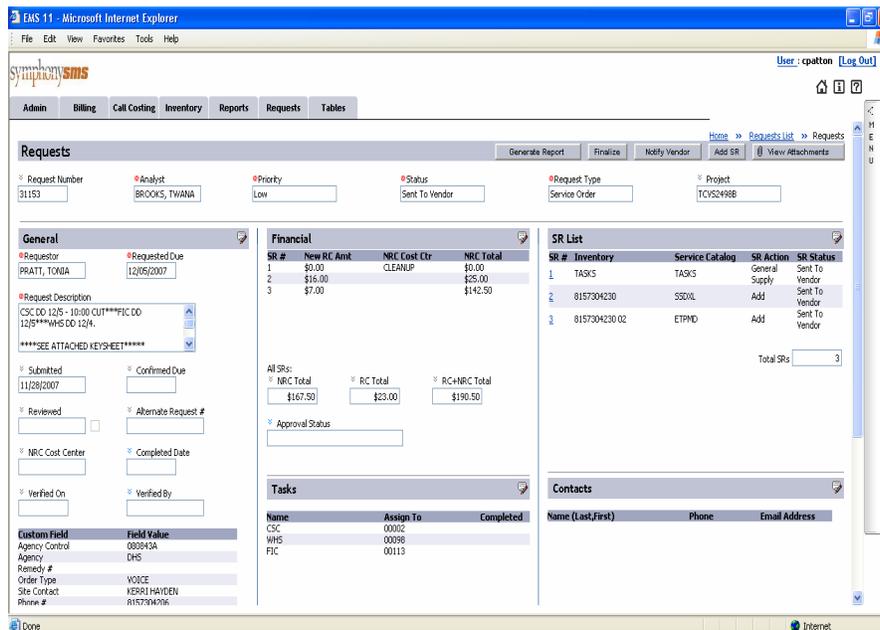
After you hit "Go" your information will appear. You may sort the items by hitting one of the headings located on the gray bar in blue. When you find your item hit the hyperlink (underlined in blue) to look at more information.

NOTE: There may be more items than what appears on the page. Look at the hyperlink numbers located just below the active only checked box. Your item may be on one of the additional pages.



The Main **Request** screen will appear. To be able to research additional information it is required that you click on the **Edit** hyperlinks located at right of section title.

NOTE: The main Request screen is now what we use which use to be the GI screen in M5. You will see different sections which deal with the actual order.



In the **General Portion** you will find the following information

- **Request #** field is a sequential number, system-generated when the Request is saved. Previously known as PO number
- **Analyst** field is the provisional's or CSS 2's name
- **Priority** field will default to "Low" and will be used for all Requests.
- **Status** field in a new request will default to "Active". The status is automatically updated for Active, Reviewed, Sent to Vendor, Complete and Finalized when the date field in the SR screen is updated or the "Finalized" button on the General Information screen is pushed. The user may change the status to "On Hold" or "Voided".
- **Request Type** field will default to "Service Order" and will be used for all Requests.
- **Project** field is a free-form description or MONIES project code for the project under which service or equipment is ordered. Information to be used in this field would be the following:  
TCVS or TCKS # (voice) **or**  
Dedicated Tech Name **or**  
CMCT or CICT (non – routine orders / BOA request) **or**  
Type of work being done **or**  
Leave Blank **or**  
Cleanup (no spaces)
- **Status Change** field the date displayed in this field is system-generated after save is clicked.
- **Requestor** field is the name of the Telecom Coordinator requesting the service.
- **Request Description** field; is a description about the Request, specifying specific task(s) by vendor(s).
- **Requested Due** field, specifies the due date the service has been requested

- **Reviewed** field is only used when an order is tracked to a CSS2. The “reviewer” selects the check box next to the date and the date is system generated. When an order is tracked to a CSS2 it is also required to change the Analyst Name to the CSS2 receiving the order.
- **Submitted** field displays the date when the request was initially entered in the system and is system generated after the request has been saved.
- **Confirmed Due** field is the day the information was sent to the assigned vendors.
- **Alternate Request #** references the M5 PO number
- **Locations Description** field; to be used to enter additional specific access requirement information where the service is to be installed, and/or any other pertinent information. (i.e. security issues). *Will only be used by provisioning when needed.*
- **MRC Cost Center** field will be used to record the Cost Center Code (AU) provided on the Telecom form (TSR, TDR, etc.).
- **Agency control number** field is used to log the agency tracking alpha/numeric characters (Alphanumeric characters will be used only, drop any special characters (i.e. “/”, “-“, etc.)
- **Remedy number** field is used when order has been entered into remedy (if one exists)
- **Assigned Vendors** field is used to acknowledge vendors involved in the work.

### **Additional sections on the Main Request screen**

**Financial portion** - not used at this time. The Financial portion provides financial information pertaining to each SR in the Request. It is similar to the F6 command in M5.

**Tasks Portion** - This screen allows a person to track all vendors assigned to a task on an SR to inquire on and update dates. All vendors will show that work in a particular telecom division. Provisioning is able to track all vendors involved on the order  
NOTE: This task list is created on SR#1 only.

**SR Lists portion** – This portion will lists all the SR (segments) associated to the Request. Will be blank until an SR has been created. You can go into a specific SR by hitting the hyperlink. At that time you will see the individual SR.

NOTE: The SR’s are also in sections. The following sections on an SR consist of the General, Custom, Options, Tasks and Logical Configuration (parenting). You go into the different sections the same way you go into the General Request screen by clicking on the “Edit” hyperlinks.

**Contact Portion** – This portion shows you the site contact and CSS 2 (if order is a project)

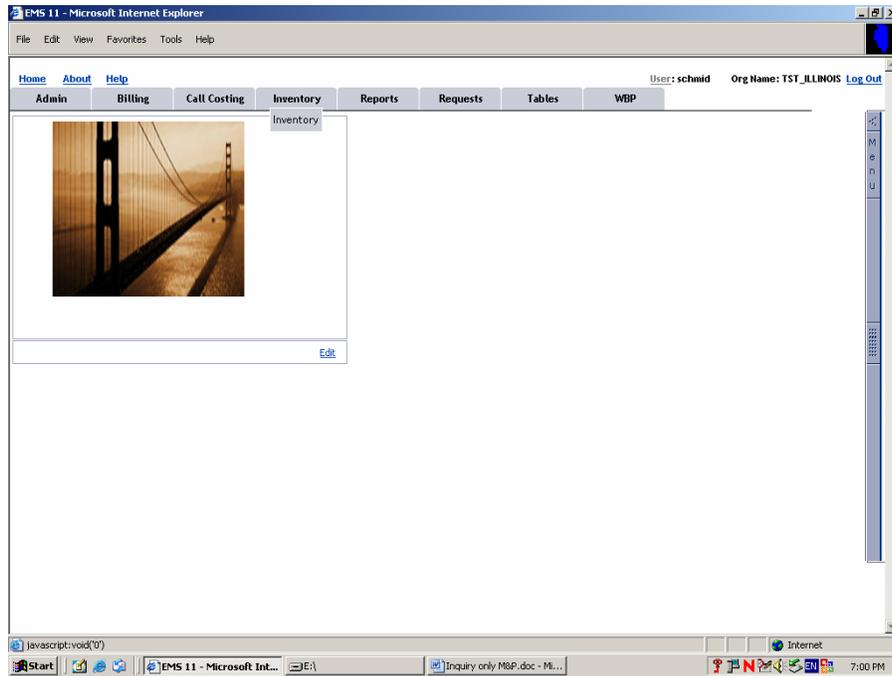
## Inquiring on an Inventory item in EMS11

The Inventory menu drop-down is used to inquire on an inventory item. Inventory can contain information on equipment and services.

To inquire on an inventory item follow the steps listed below:

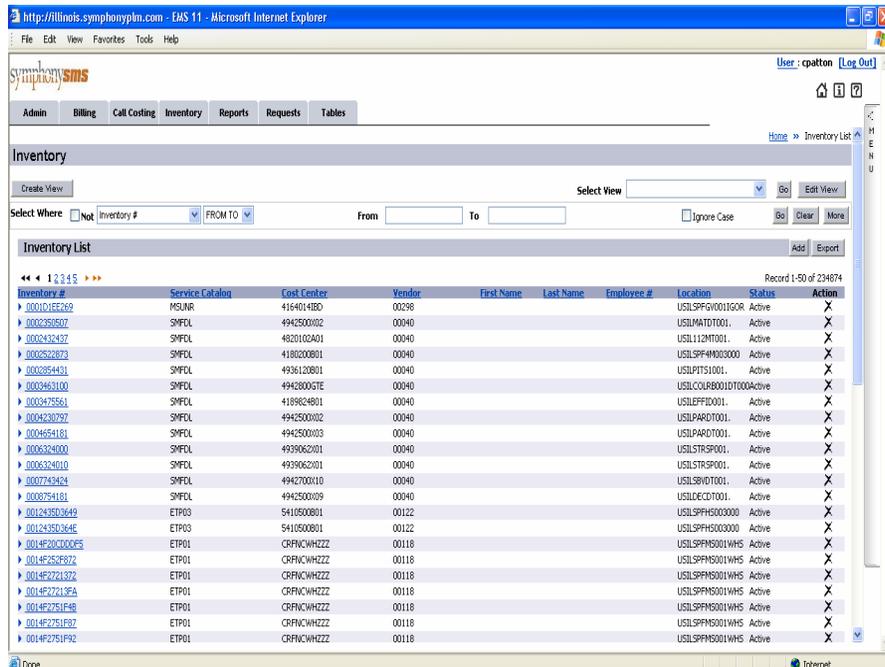
**Step 1** Click on the **Inventory** menu item.

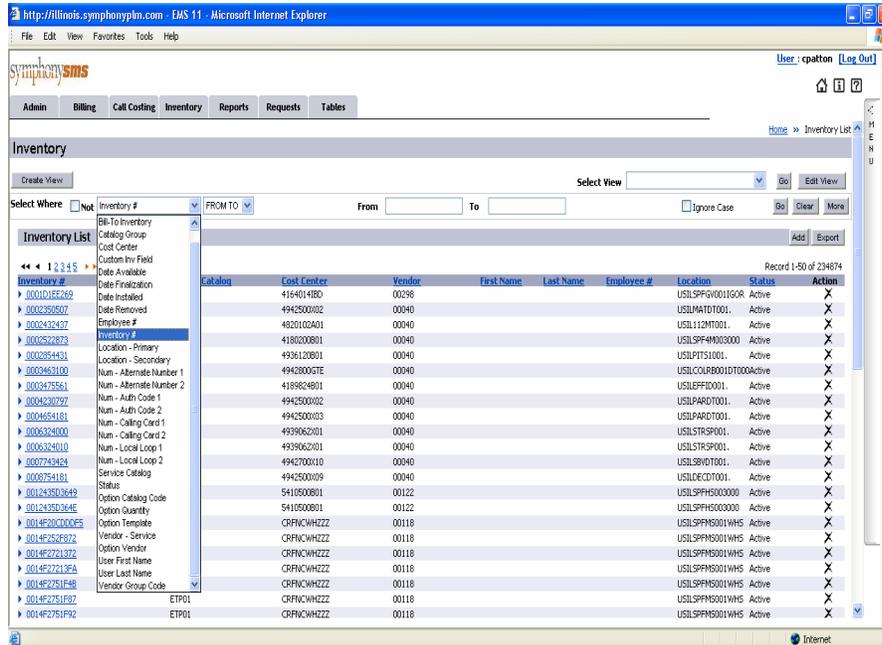
**Step 2** In the **Inventory** drop-down that appears, click on the **Inventory** option.



A list of Inventory items will appear.

NOTE: This is a list of every inventory item. When a search criteria as been established will the number of inventory items be sorted EMS allows you to search on a variety of items. Go to the pull down associated with the **Select Where** field and select your search criteria.





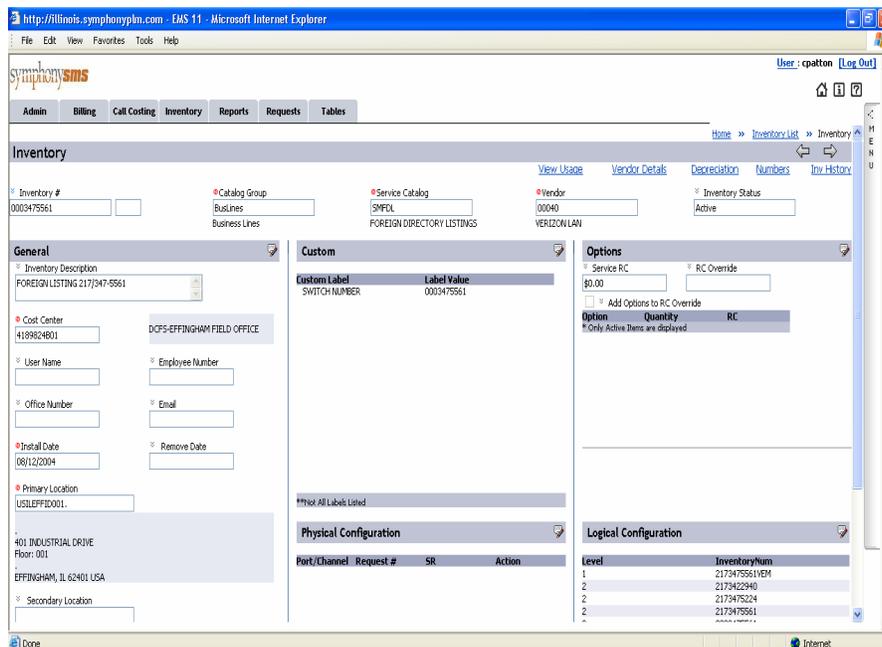
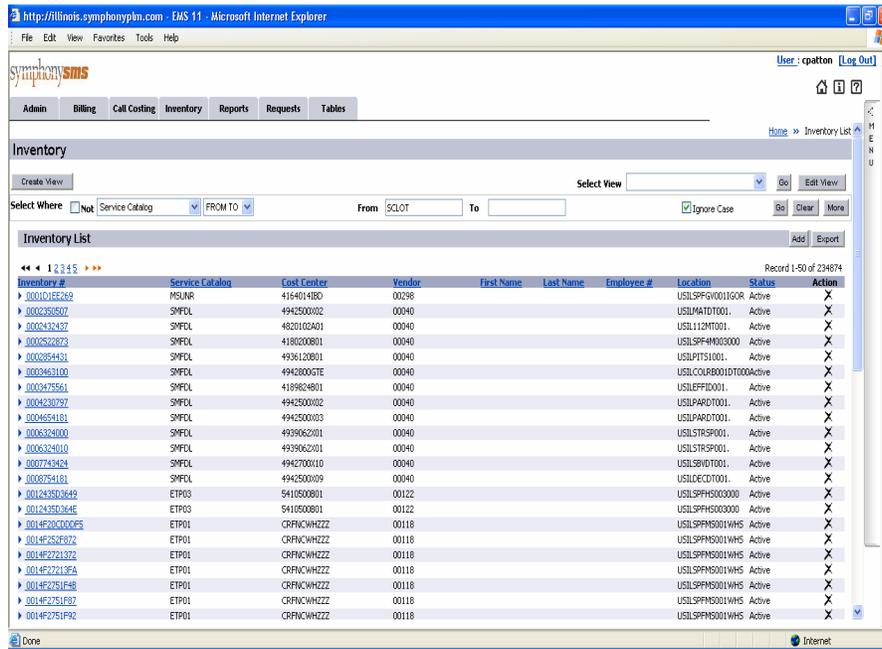
Place information in the “From” field and the “To” field (if necessary) this will give you a range and hit go.

**NOTE: Remember to place a check mark in the “Ignore Case” box.**

NOTE: You may search on multiple criteria items by clicking on the “More” button. There is no limit to the number of criteria you can search on in EMS.

After you hit “Go” your information will appear. If you are searching on multiple items you may sort the items by hitting one of the headings located on the gray bar in blue. When you find your item hit the hyperlink (underlined in blue) to look at more information.

NOTE: There may be more items then what appears on the page. Look at the hyperlink numbers located just below the active only checked box. Your item may be on one of the additional pages.



The **Inventory** screen will appear. To be able to research additional information, it is required that you click on the **Edit** hyperlinks located at the right of each section title.

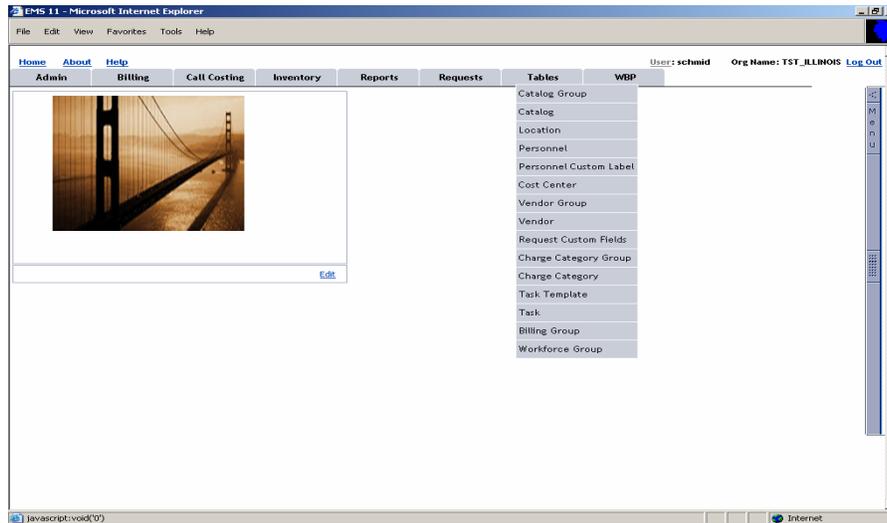
## Inquiring in Tables on specific data in EMS11

The Table drop-down is used to inquire on different information like location codes, personal table, catalog codes and cost center codes (AU), along with a variety of other items.

**To inquire on a Location, Catalog codes, Cost Center code and Personnel code follow the steps listed below:**

**Step 1** Click on the **Tables** menu item.

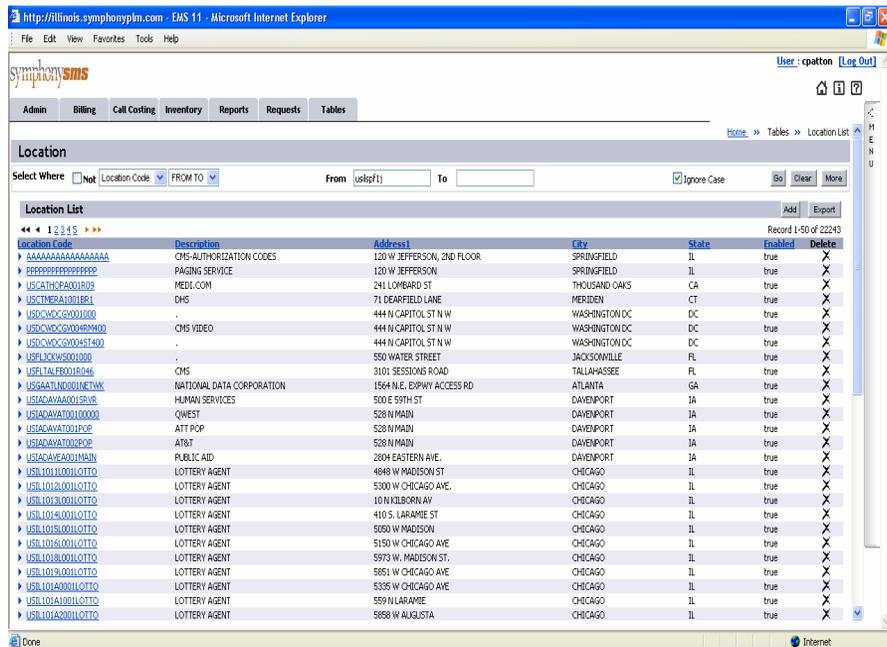
**Step 2** In the **Tables** drop-down that appears, click on the preferred database.

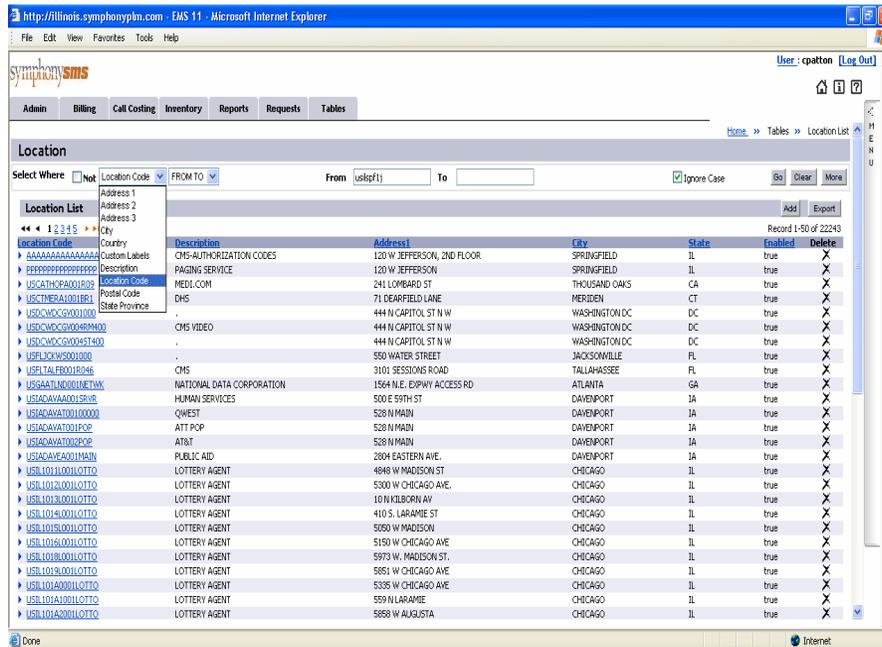


A list of data will appear.

NOTE: This is a list of every Location code, Cost Center code, Catalog/Option code etc. EMS allows you to search on a variety of items. Go to the pull down associated with the **Select Where** field and select your search criteria.

(The following screen shots displays “Location code database”)





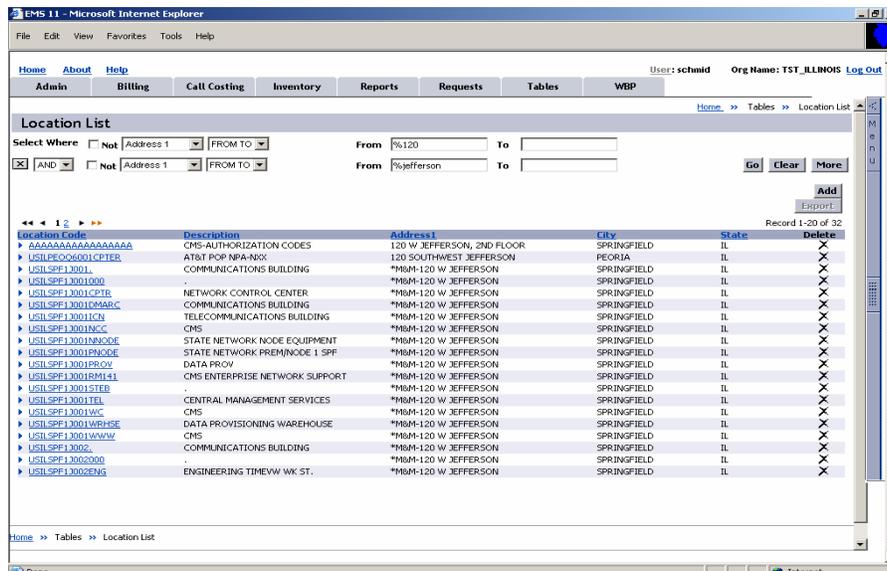
Place information in the **“From”** field and the **“To”** field (if necessary) this will give you a range and hit go. EMS allows you to search on a partial street address or other item by using a **“%”** in front of the search criteria. This is known as a wild card key.

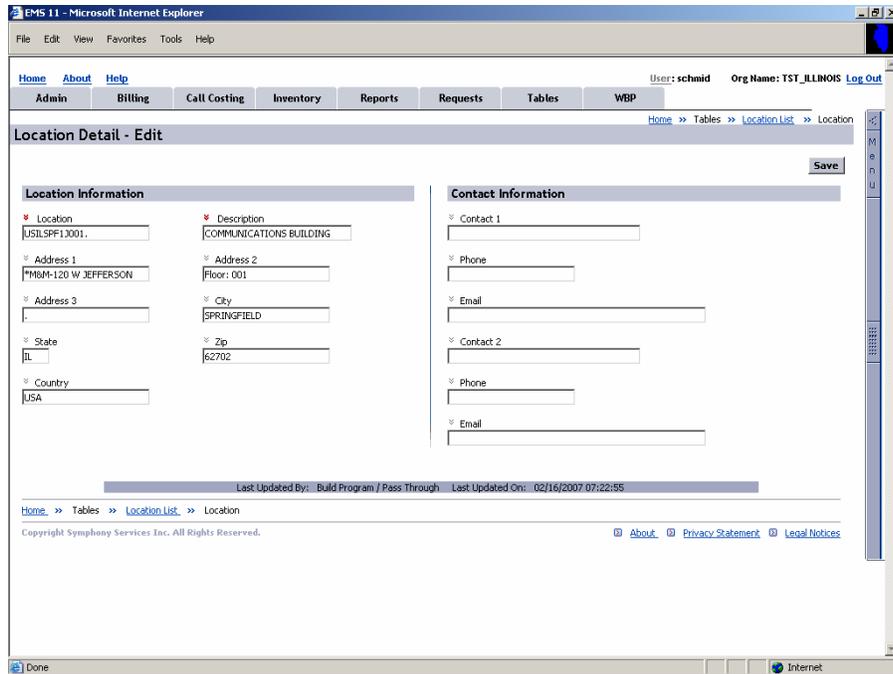
**NOTE: Remember to place a check mark in the “Ignore Case” box.**

**NOTE: You may search on multiple criteria items by clicking on the “More” button. There is no limit to the number of criteria you can search on in EMS.**

After you hit **“Go”** your information will appear. If you are searching on multiple items you may sort the items by hitting one of the headings located on the gray bar in blue. When you find your item hit the hyperlink (underlined in blue) to look at more information.

**NOTE: There may be more items then what appears on the page. Look at the hyperlink numbers located just below the active only checked box. Your item may be on one of the additional pages.**





The **Detail Database - Edit** screen will appear for selected table that provides additional information .

NOTE: This same procedure can be done when searching on other items located in the Tables menu.