EMS UP-DATES

Telecom Coordinators can change the following fields in EMS:
Inventory Description
Cost Center
User Name

**** ALL CHANGES ARE TO BE MADE IN UPPER-CASE ****

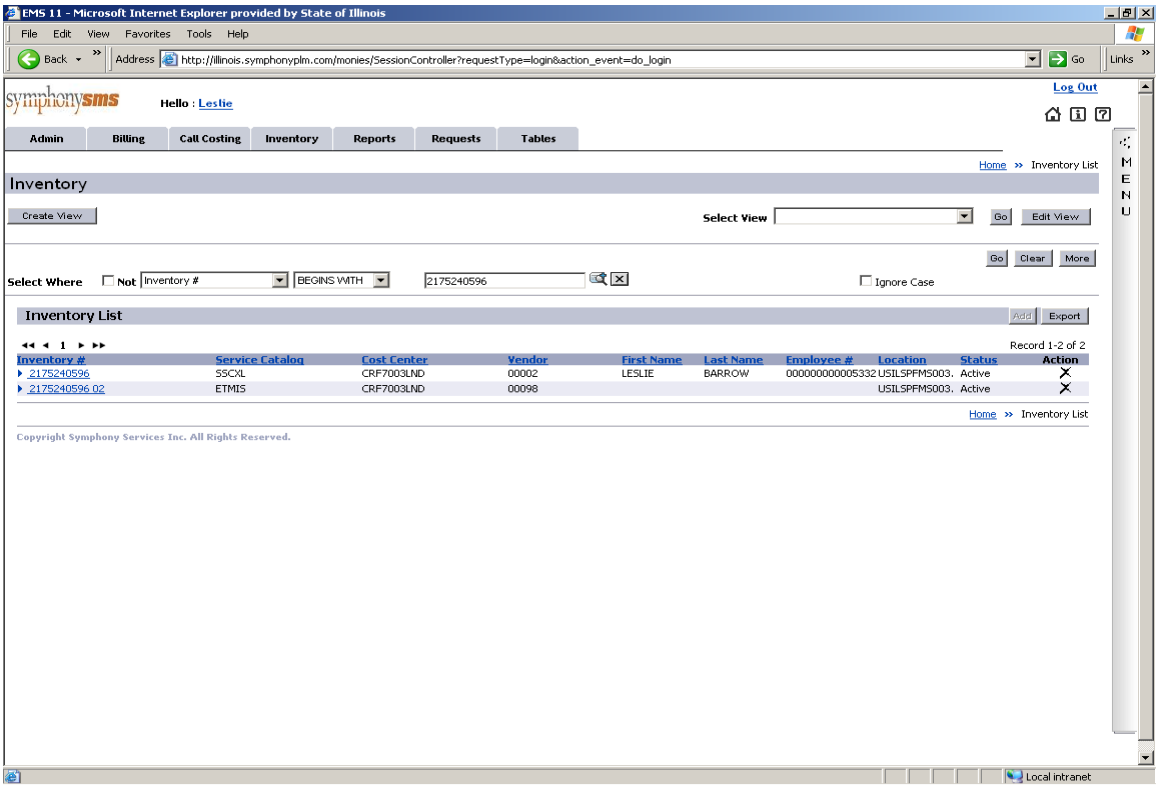
NOTE: If there is an open Service Request (SR) any changes you make will be over written when the analyst finalizes the Request and/or SR(s). If you would like to check for any open SR's please refer to the "**OPEN SR VERIFICATION**" portion of the EMS M&P for instructions on how to perform this action.

To make changes in EMS follow the steps listed below:

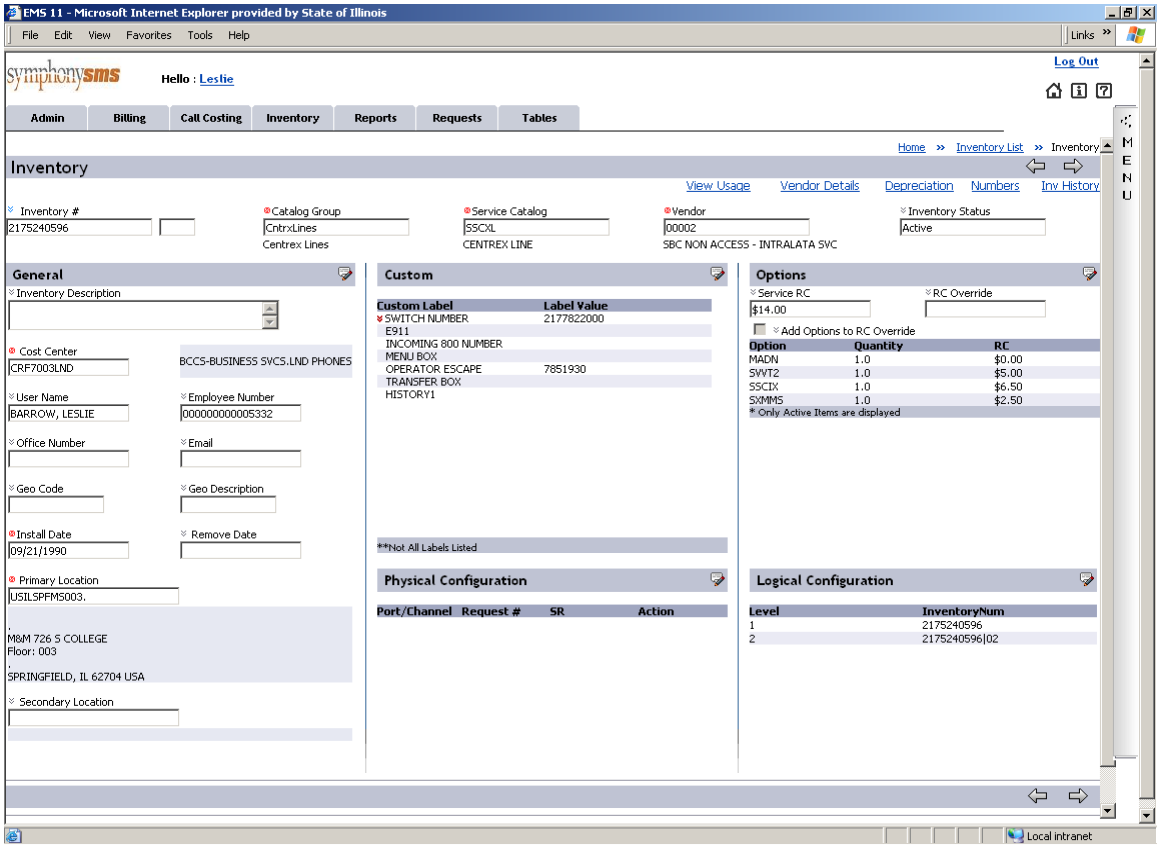
Step 1 Click on the Inventory menu

Step 2 In the Inventory drop down, click the Inventory Search option

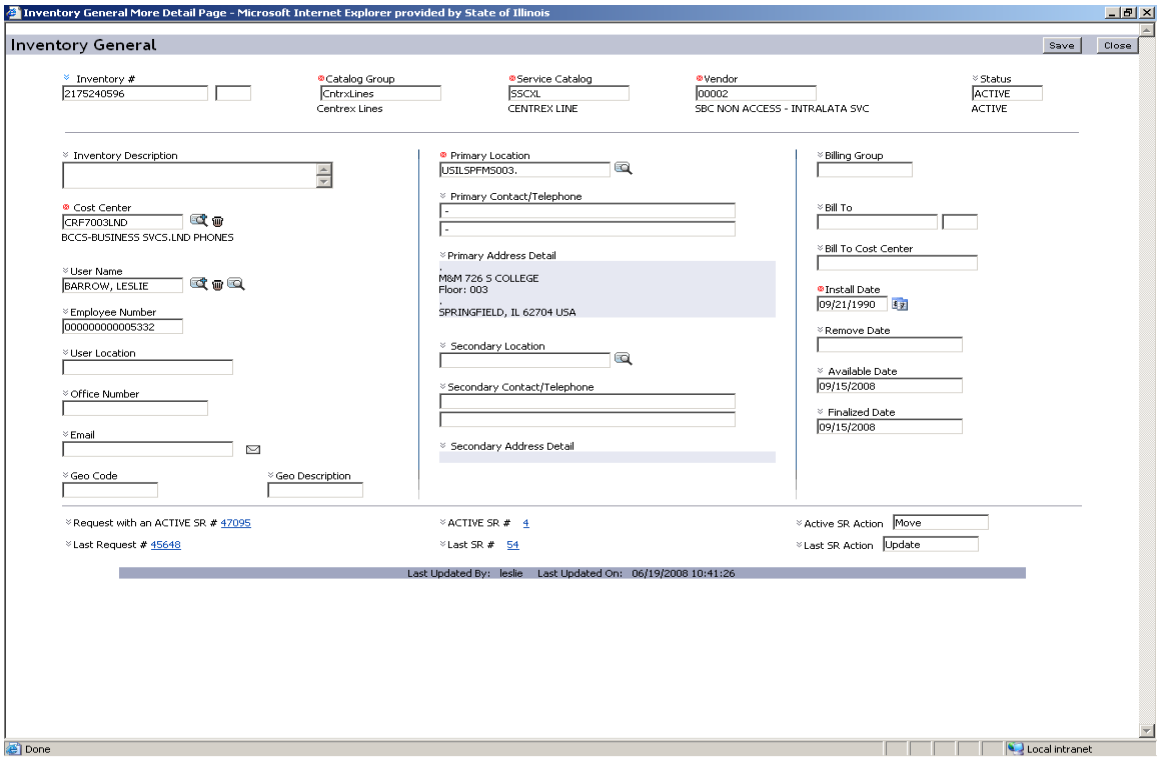
Step 3 Enter the inventory number that needs to be up dated



Step 4 Click on the inventory number

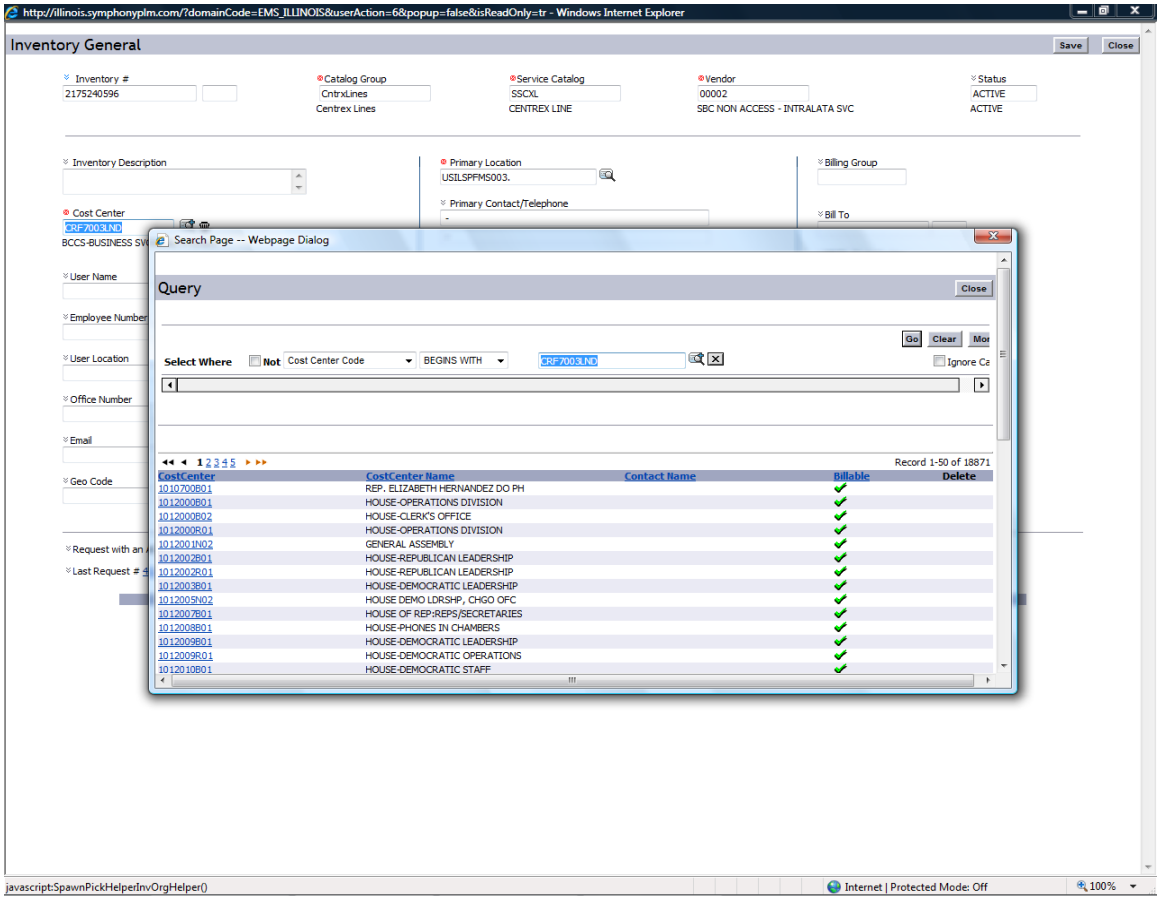


Step 5 Click on the General section by clicking on the edit button on the right corner of the General section.



Step 6 If you are making changes to the Inventory Description section (use all CAPS). Enter the information right into the Inventory Description area. If the only changes that need to be made are in this area then move to Step 9

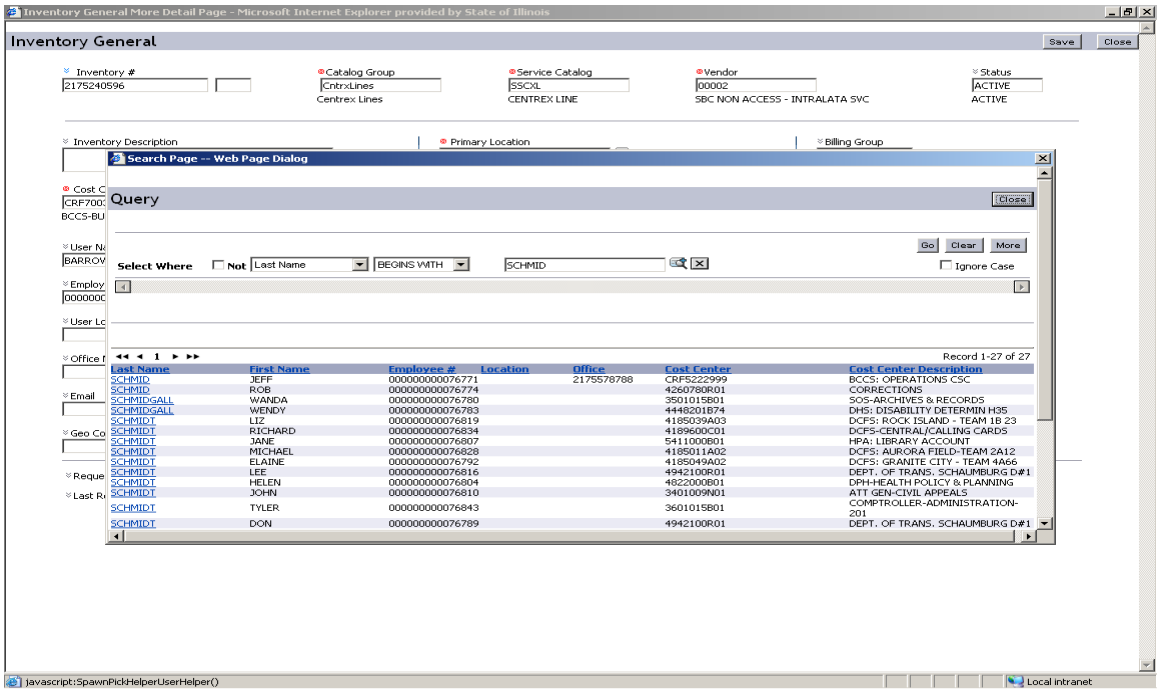
Step 7 Cost Center changes can be made by clicking on the button next to the Cost Center field. Click on the drop down arrow and select Cost Center Code and in the field after BEGINS WITH add the Cost Center Code. Click the Go button. Click on the Cost Center hyperlink to populate the Cost Center field on the Inventory item. If no more changes are needed move to Step 9



Step 8 To change the User Name, click on the button next to the User Name field. In the field after BEGINS WITH add the users last name. Click the Go button. Click on the Last Name hyperlink to populate the User Name field on the Inventory item. The name will automatically populate the field. If you would just like to remove the name, click on the button next to the User Name field and it will automatically remove the name. If no more changes are needed move to Step 9

- User Name is only last name, first name. If the inventory is a fax line or anything that would not have a name, then that information will have to go into the Inventory Description area. If the User Name field is empty the Inventory Description will appear on the bill. Please remember that only the first 25 characters will appear on the bill.

If the name to be installed does not exist in the Personnel Table then refer to **EMS ADDS TO PERSONNEL TABLE** and follow steps. When completed then repeat Step 8 of the **EMS UP-DATES**.



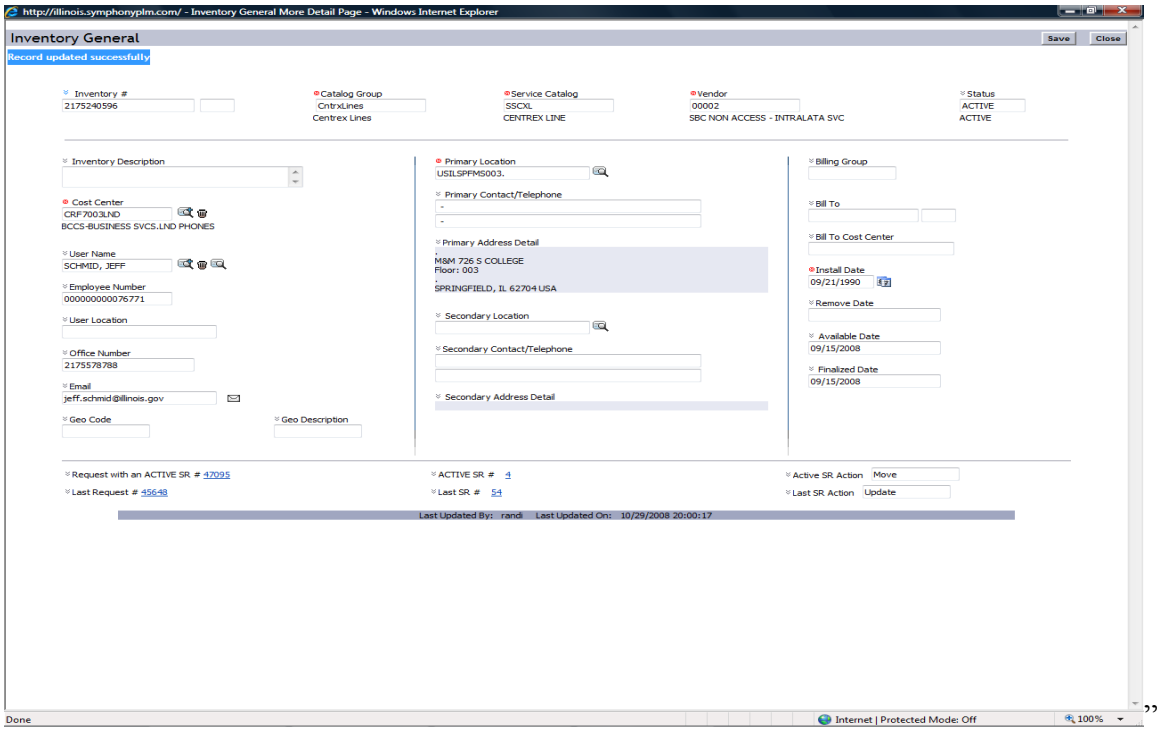
Step 9 After all changes have been made and checked, click the SAVE button in the top right corner of the page.

- After you click on the SAVE, you will receive one of two messages.

  Record updated successfully

  Error Found

  If an error was found you will receive an explanation of the error.



EMS ADDS TO PERSONNEL TABLE

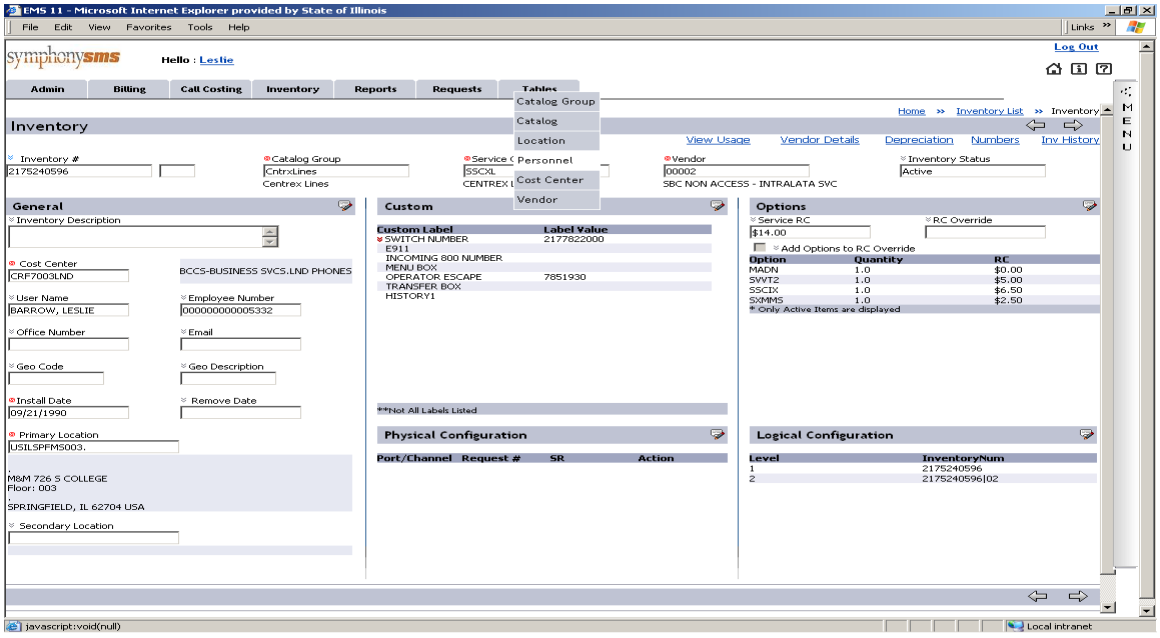
Telecom Coordinators can add a person to the Personnel table in EMS.

**** ALL ADDS ARE TO BE MADE IN UPPER-CASE ****

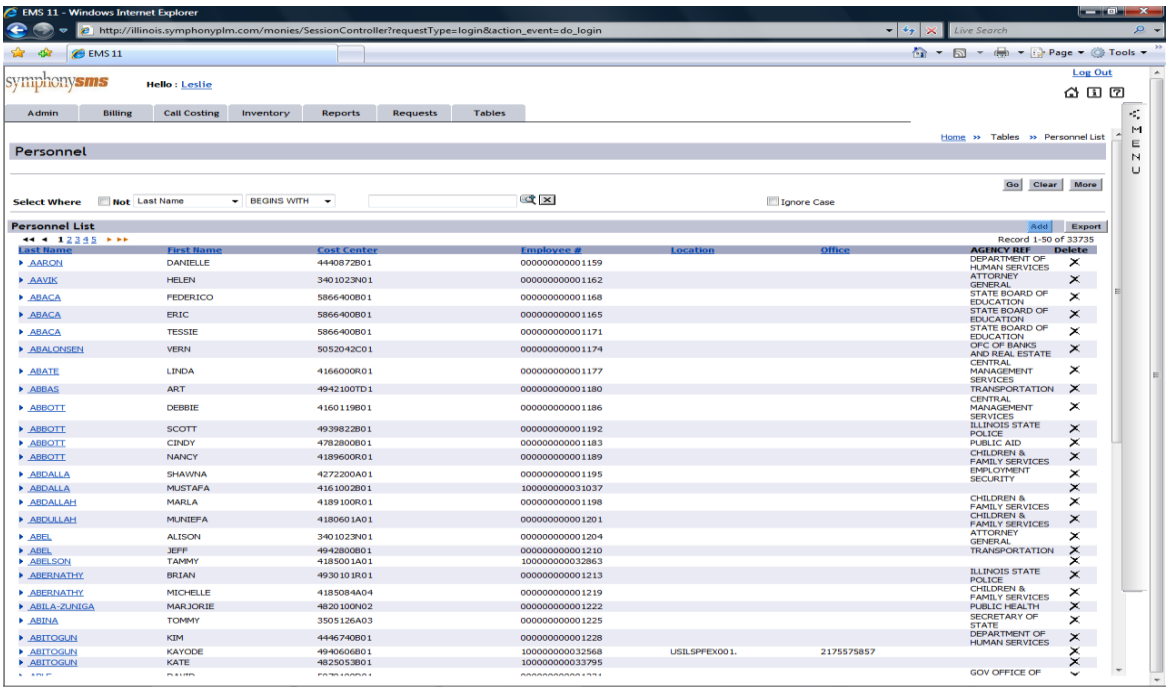
To add someone to the personnel table, follow the steps listed below:

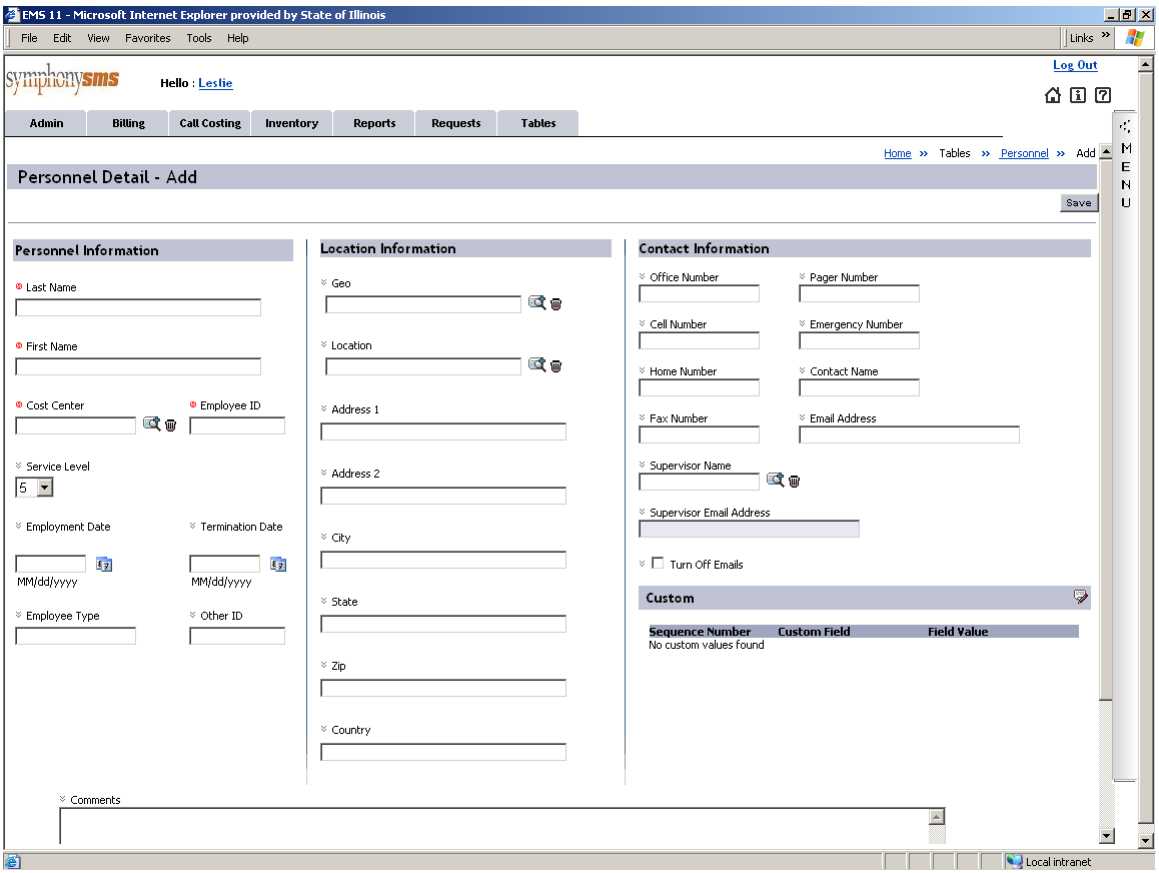
Step 1 Click on the **Tables menu**.

Step 2 In the **Tables** drop down, click on **Personnel**.



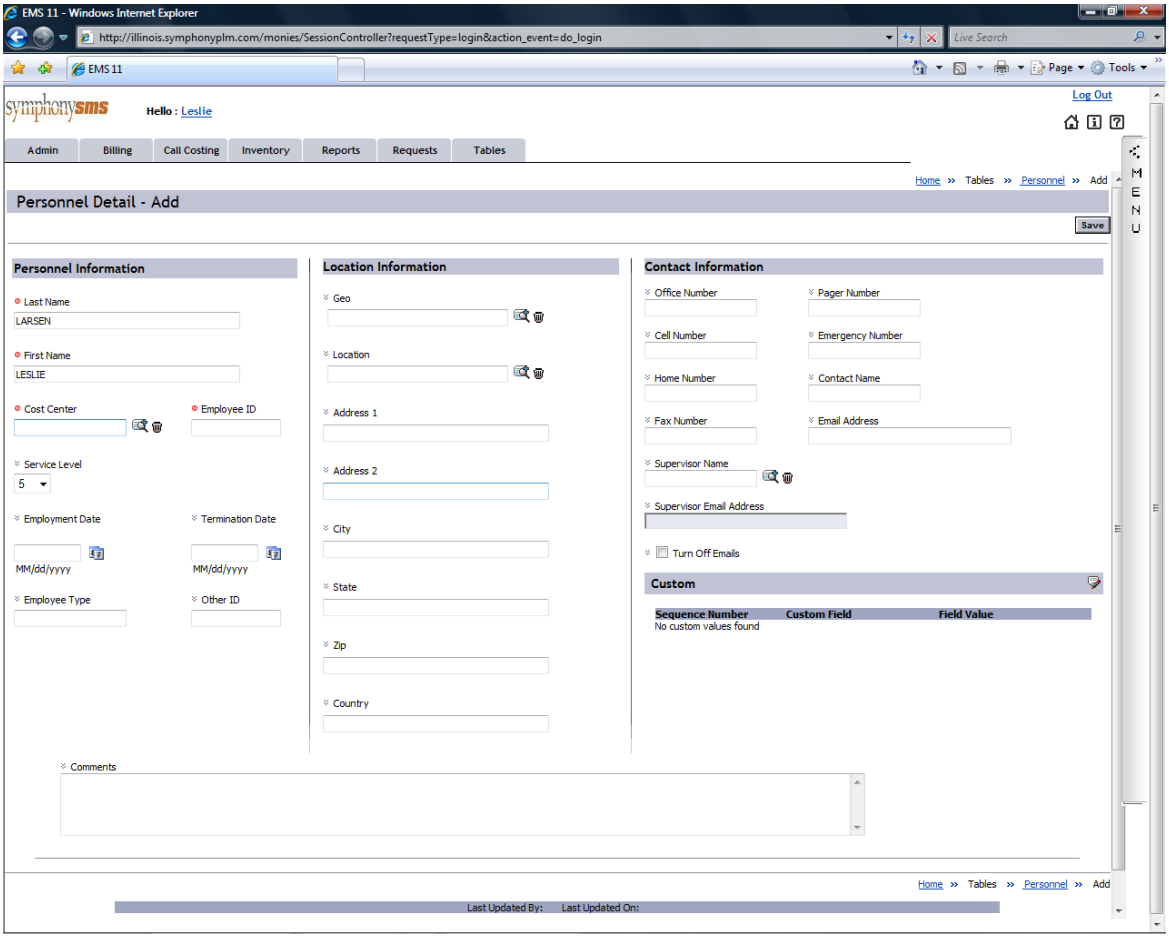
Step 3 Click on the ADD button on the right side right next to export button.



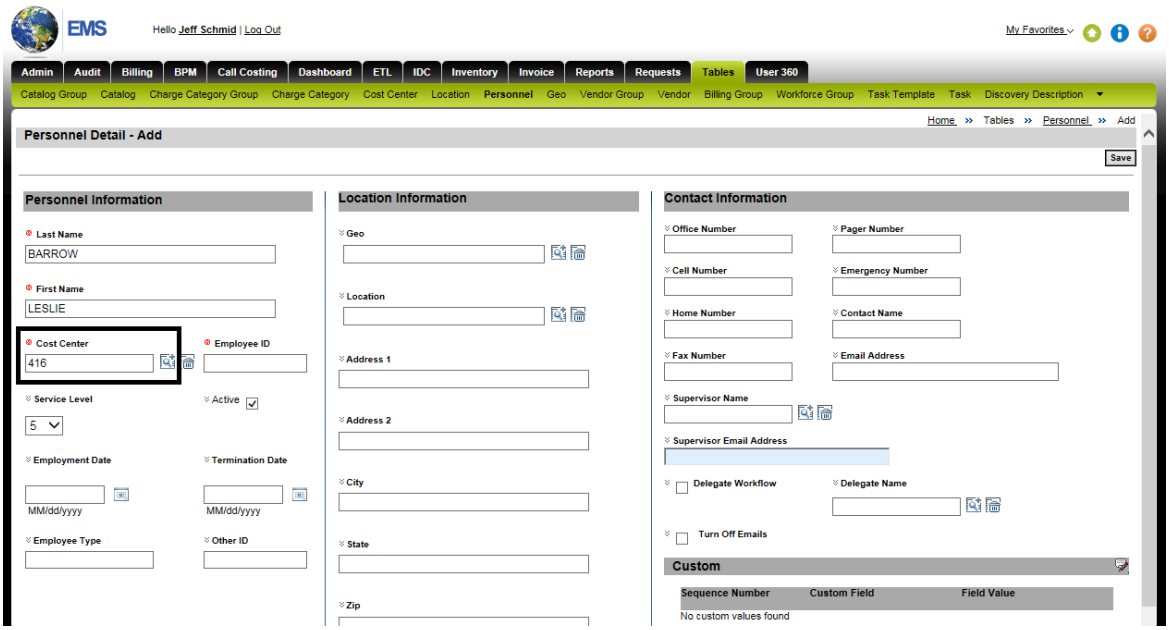


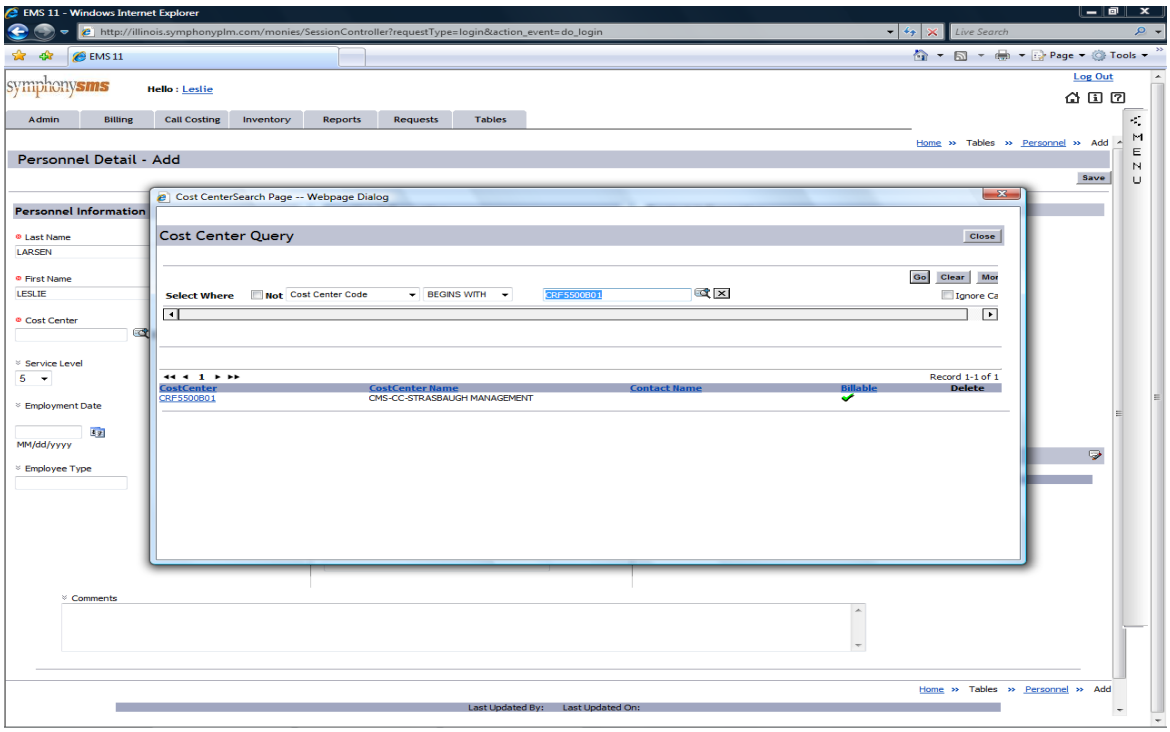
Step 4 Begin adding the person's name by populating the following fields:

- ✓ Last Name
- ✓ First Name
- ✓ Cost Center – refer to Step 5 for further instructions
- ✓ Employee ID – system generated



Step 5 To add Cost Center code click on the blank field associated to the Cost Center. Enter the first 3 alpha/numeric characters into this field.
Note: Only required to populate with first 3 characters of Cost Center Code. This shows what agency the person entered in Personnel table is assigned to.





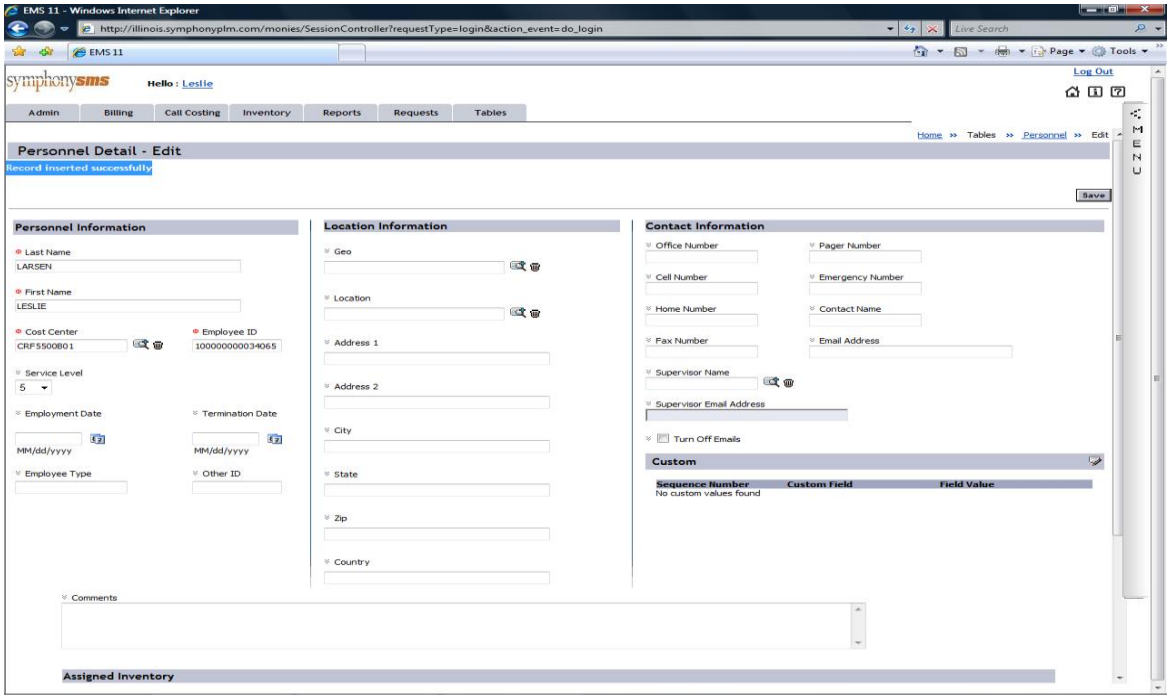
Step 6 After all fields have been populated click the SAVE button in the top right corner of the page.

- After you click on the SAVE, you will receive one of two messages.

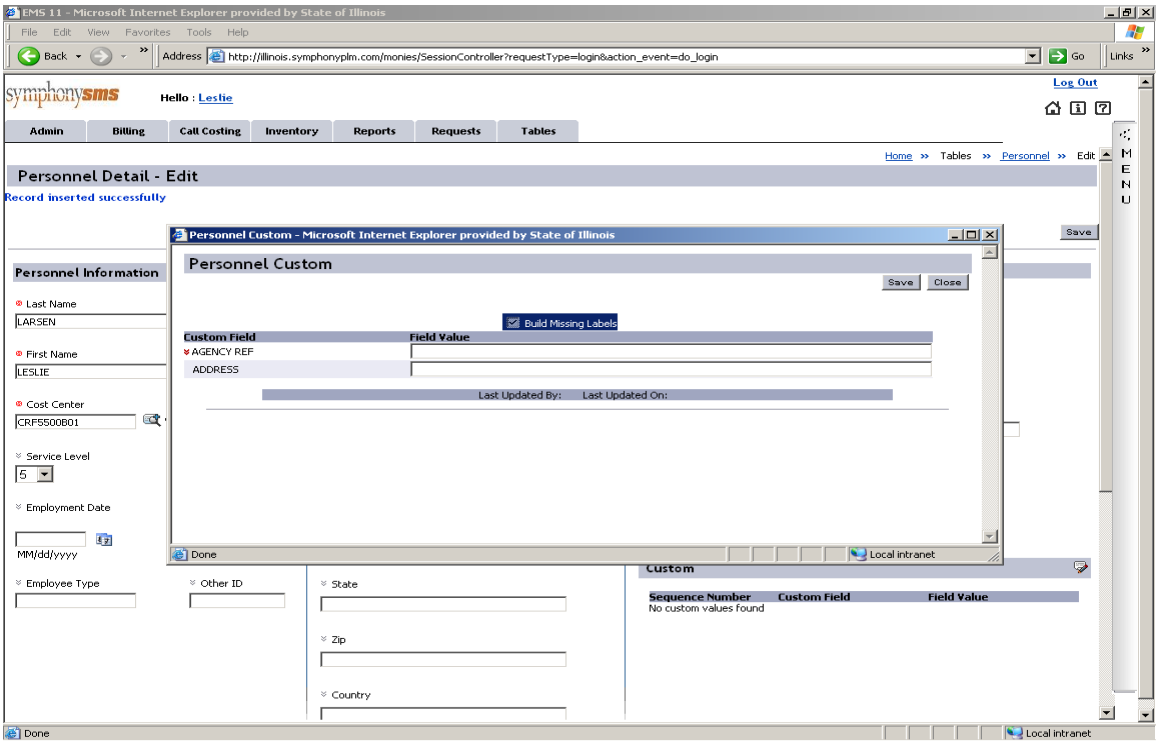
  Record updated successfully

  Error Found

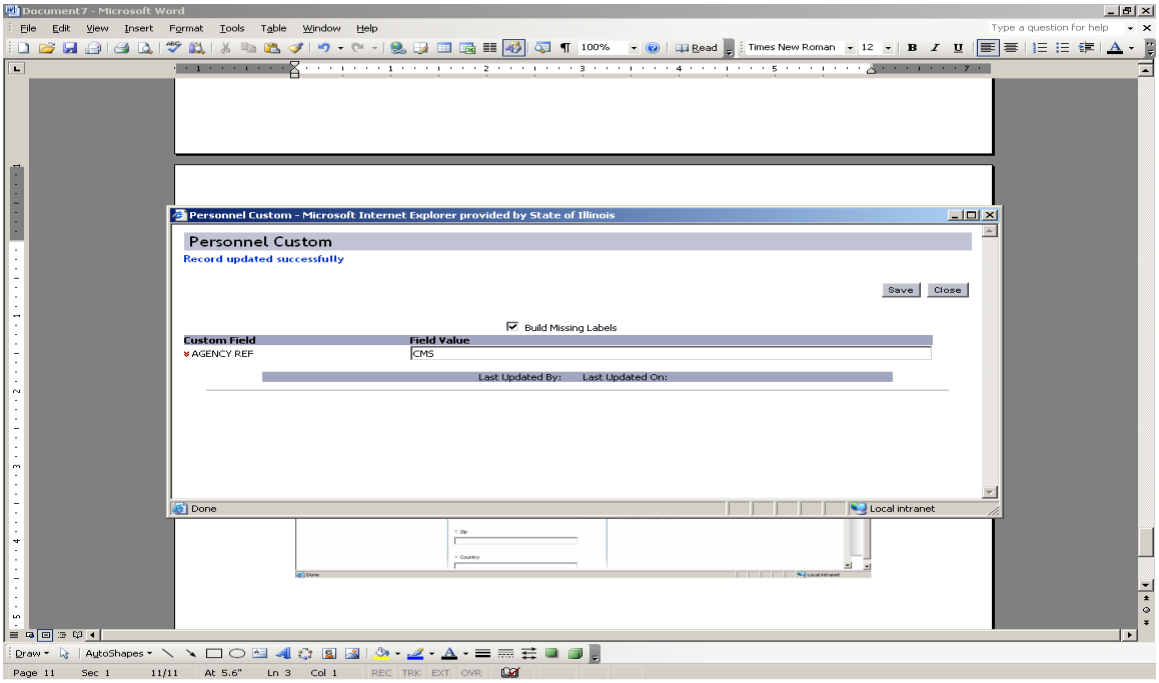
  If an error was found you will receive an explanation of the error.



Step 7 Click on the Custom section by clicking on the edit button on the right corner of the Custom section.



Step 8 Click on the Build Missing Labels box **Build Missing Labels**. This will show the custom labels. In the **AGENCY REF** Custom label put the agency name.



Step 9 Click the **Save** button in the top right corner of the page. After page displays **Record updated successfully** then click on **Close** button.

- After you click on the SAVE, you will receive one of two messages.
  Record updated successfully
  Error Found
  If an error was found you will receive an explanation of the error.

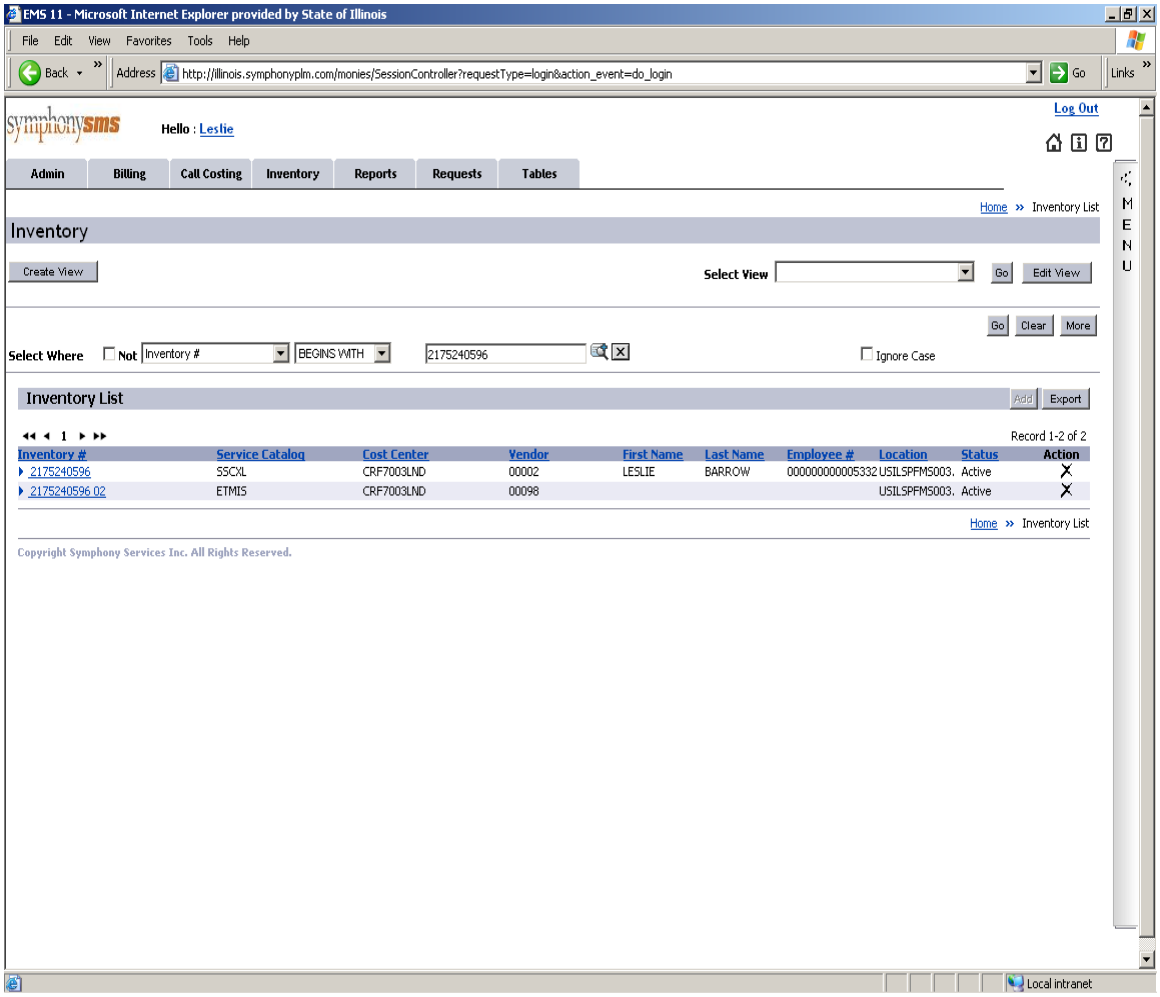
OPEN SR VERIFICATION

Before any changes are made to inventory items please follow the steps below to verify that there are no open Service Requests (SR's):

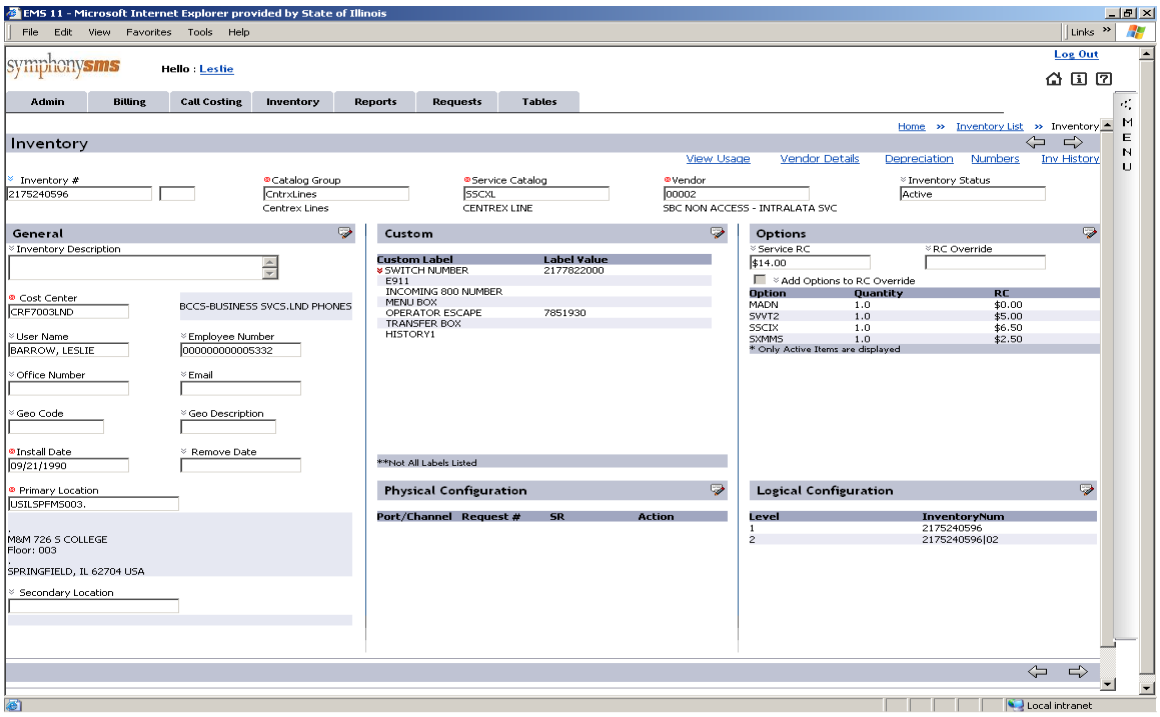
Step 1 Click on the Inventory menu

Step 2 In the Inventory drop down, click the Inventory Search option

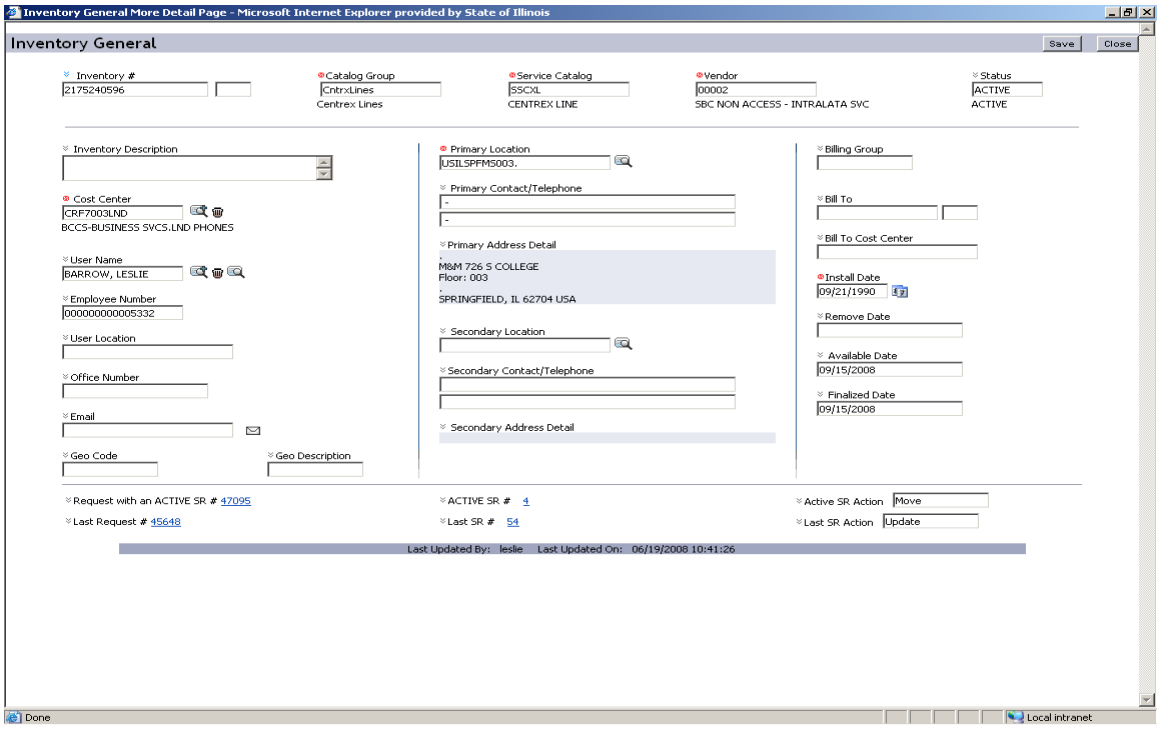
Step 3 Enter the inventory number that needs to be up dated



Step 4 Click on the inventory number

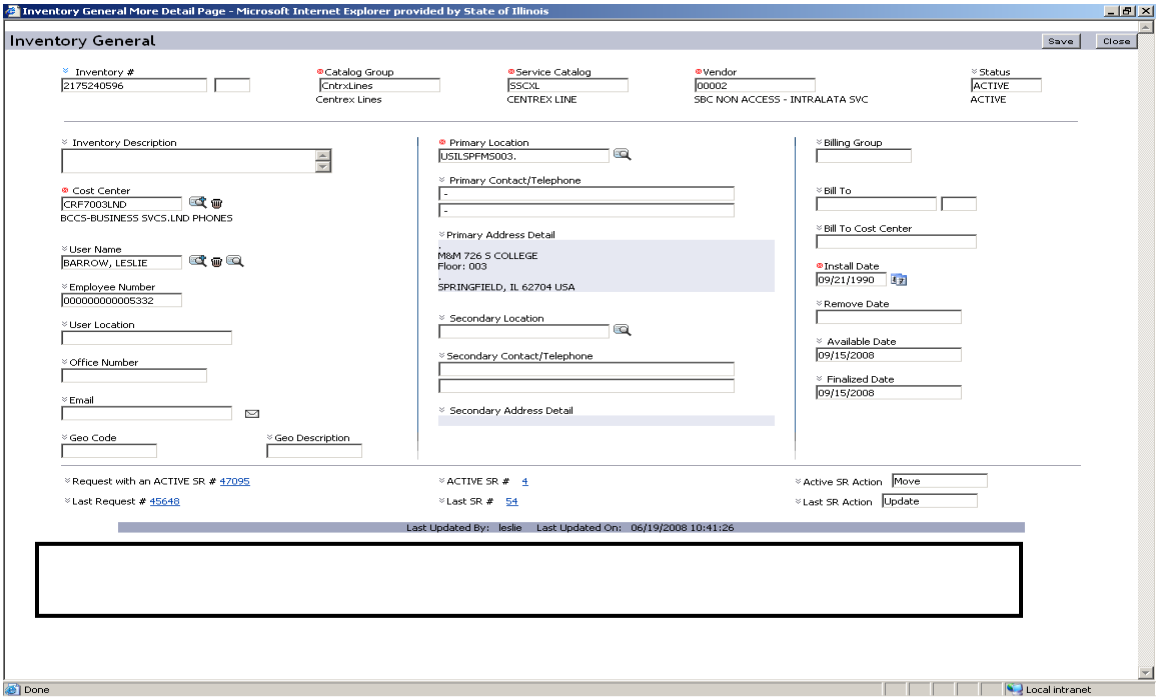


Step 5 Click on the General section by clicking on the edit button on the right corner of the General section.



Step 6 Scroll to the bottom portion of the General section and check for any open SR's at this time. If there is information present as seen in the screen shot below please click on

the **"Request with an ACTIVE SR" or "ACTIVE SR #"** hyperlinks to see the status of the associated SR.

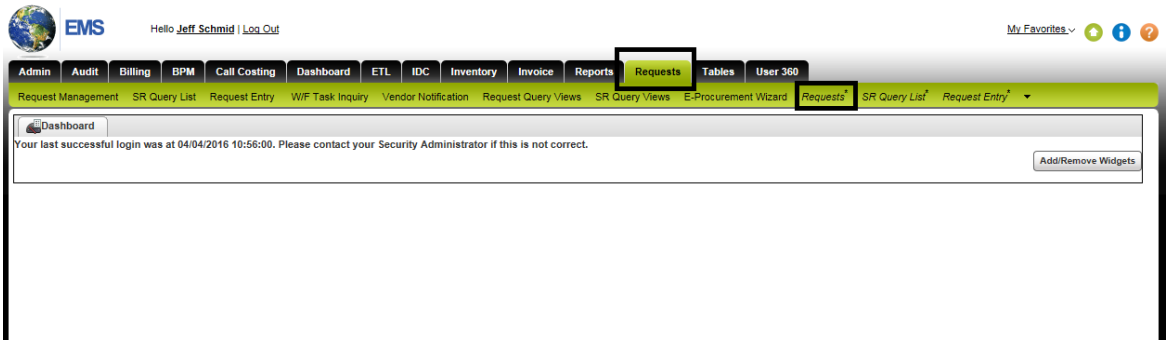


- ✓ ***Important:*** **If an ACTIVE SR's is present then it is important to wait until the SR has been finalized so that any changes you make are not changed when the SR is finalized.**
- ✓ **You can check with the Analyst to verify when the Request and/or SR(s) are to be finalized.**

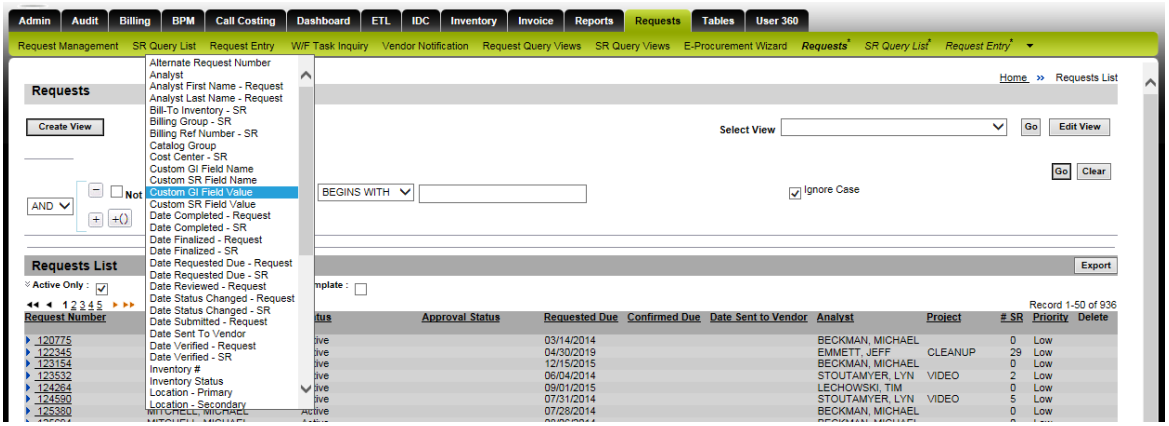
REQUEST FOLDER FOR TSR VERIFICATION

Step 1 Click on the Request menu

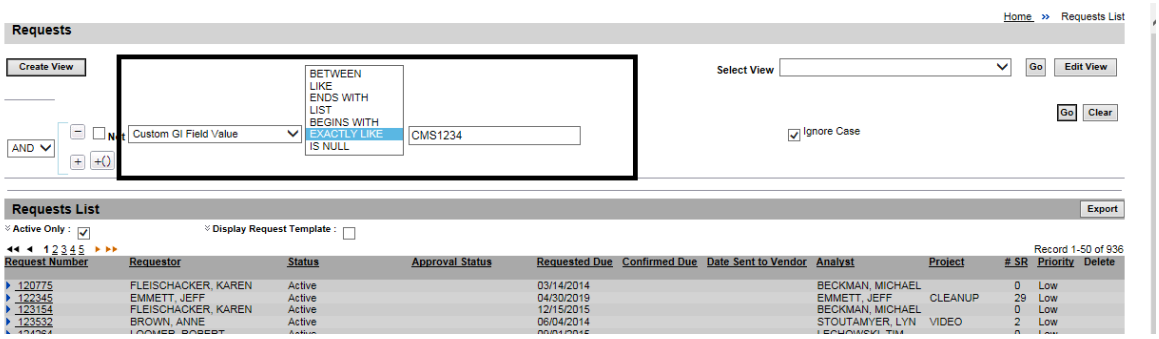
Step 2 In the Request drop down, click the Request* Search option



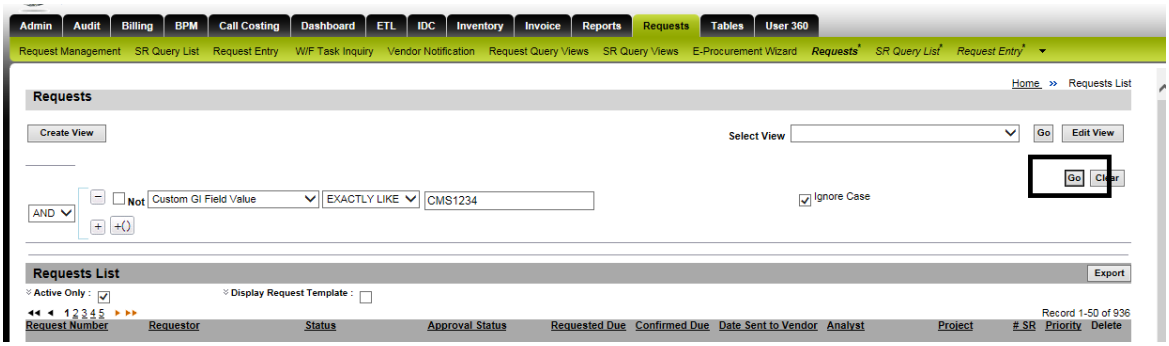
Step 3 In the Search option field (defaults to Analyst First Name – Request) click on dropdown and select the search criteria of **Custom GI Field**.



Step 4 Select **Exactly Like** from the Search Criteria dropdown. Then enter the Agency Control number in the blank field.
Note: Control number information is agency specific

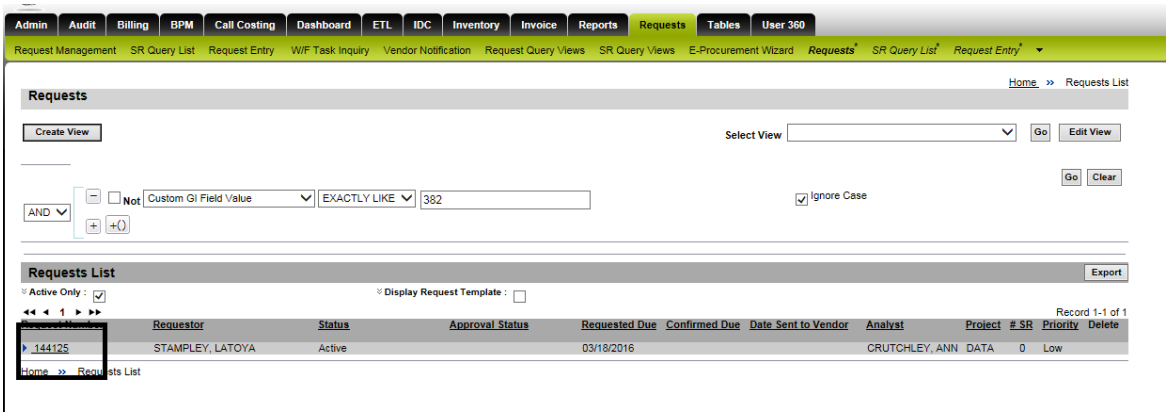


Step 5 Click on **Go button**



You will get the EMS11 Request number that has been assigned to your Telecom Form.

Click on the **hyperlink** to review the Request and the status of the request
Note: If you do not see a **Request number** after clicking on the **Go** button then try unchecking the Active Only box "**Active Only :** ☑ ". EMS11 defaults to Active only


Admin
Audit
Billing
BPM
Call Costing
Dashboard
ETL
IDC
Inventory
Invoice
Reports
Requests
Tables
User 360
Request Management
SR Query List
Request Entry
W/F Task Inquiry
Vendor Notification
Request Query Views
SR Query Views
E-Procurement Wizard
Requests*
SR Query List*
Request Entry*
Home » Requests List
Requests
Create View
Select View
Go
Edit View
Go
Clear
AND
Not
Custom GI Field Value
EXACTLY LIKE
382
Ignore Case
Requests List
Export
Active Only :
Display Request Template :
Record 1-1 of 1
Requestor
Status
Approval Status
Requested Due
Confirmed Due
Date Sent to Vendor
Analyst
Project
SR
Priority
Delete
144125
STAMPLEY, LATOYA
Active
03/18/2016
CRUTCHLEY, ANN
DATA
0
Low
Home » Requests List