BCCS
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PUBLICATION APPROVAL FORM

Publication Name(s): **Version #(s):**

EMS User Guide (4212015)

PROCESS, PROCEDURE, & STANDARD PUBLICATIONS

APPROVER	Print Name	Signature	Date
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Expense Management System

Expense Management System (EMS) is an integrated, web-based software application that provides organizations with the ability to manage their telecom inventory and expenses. The system automates order processing, asset management, billing, chargeback, vendor management, and invoice reconciliation for these services.

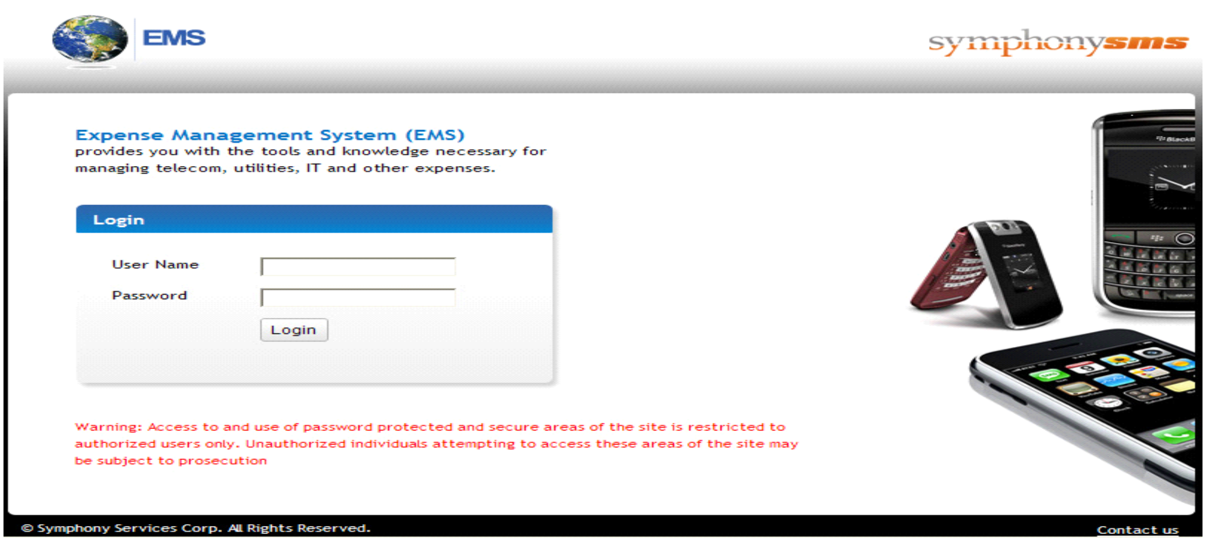
Logging In to EMS

To access EMS, you must have a valid user account. If you need clarifications pertaining to your user account, contact your System Administrator.

Note: If you are using the application for the first time after upgrading it, opening the application will take you directly to the Change Password page. Upon successful change of the password, the login page appears, and you must re-login using the new password.

To login to EMS:

1. In your Web browser, enter the URL as provided by your System Administrator.



The **EMS login** page appears.

Note: For future reference, it is recommended that you add this URL to the list of Favorites in your Web browser.

2. In the **User Name** field, enter your user account name. All user accounts are set up by your

System Administrator.

3. In the **Password** field, enter the password associated with the user account. Your password is case-sensitive and will be masked with asterisks (*) to ensure confidentiality.

4. Click **Login**.

Logging out of EMS

This section provides instructions on logging out of EMS.

To log out of EMS:

1. Click the **Logout** in the upper right corner of the page.

You are logged out of the application.

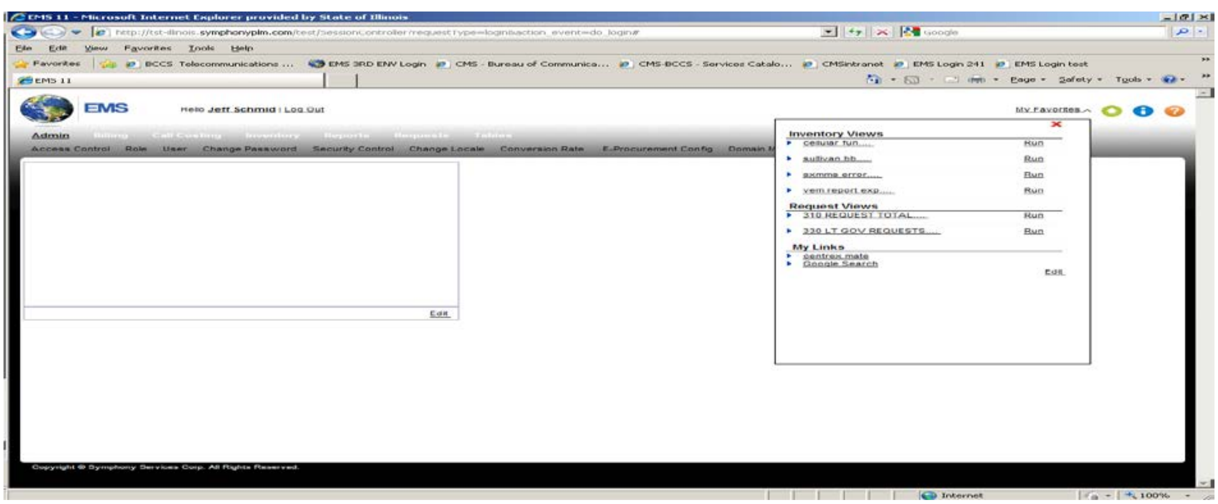
My Favorites

EMS enables you to view links to existing EMS reports and links to other URLs on clicking the My Favorites link.

- **Existing Report Links** - All the EMS Reports, for which the **Add to Dashboard** check box has been selected, will appear under the **My Favorites** link. The Reports will be grouped based on the Report Group it belongs.

  Note: You can execute a report with the default parameters and edit an existing report.

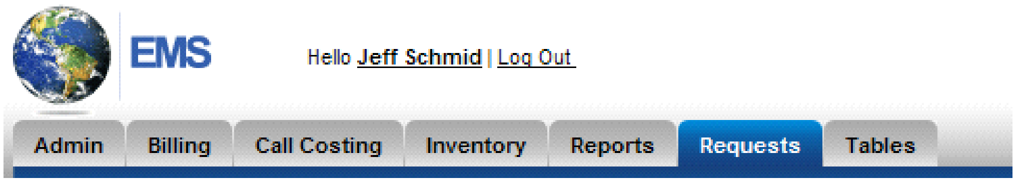
- **My Links -** You can include a list of URLs of other internet or intranet pages here. Click on these hyperlinks to navigate to the respective web pages from within the home page.



EMS Modules

- The words across the top of the represent “Modules” or areas of functionality in the system that the user has access to.

- ***Note:*** Depending on Security settings for assigned groups this determines which modules are available for access.



- **Admin** - Make updates to the Password
- **Billing** - The Billing module assists you in managing your telecommunications expenses.
- **Call Costing** - The Call Costing module is used to create or update "Switches"
- **Dashboard** - The Dashboard module allows you to create report templates specific to your need.
- **Inventory** - The Inventory module allows you to track both physical and logical inventory items that are issued or are to-be-issued to customers. The EMS application has standard build programs that input existing electronic data to build the inventory database. The Inventory module is used to track items like voice, data, wireless, pagers and network equipment, and allows you to manage all network components with one single centralized system.
- **Reports** - The Reports module includes a variety of report templates, which you can use to create reports that meet your specific needs.
- **Requests** - The Requests module provides features to place and track orders, make a specific request for a service and make enquiries on TASKS which show vendors assigned. When applicable, the resulting changes in inventory are processed automatically upon service request finalization.
- **Tables** - The Tables module provides user-defined information that is used throughout the EMS application. Be able to inquire into the Location, Cost Center, Catalog, Catalog Group, Vendor, and Personnel Tables.

Common Application Features

This section describes some of the common features that are available across the application.

Date Options

Most of the pages in the application contain a **Date Options** field, which allows you to define the date range. You can define Dates using either of the options listed below:

- By defining it manually
- By enabling the Calendar window

Defining it manually:

• Enter the date in the following format: mm/dd/yyyy.

Enabling the calendar window:

1. Click the **Calendar** icons corresponding to any date field.
   The **Calendar** window appears.

- Go back to previous years
- Go forward a year from current date
- Go back in months
- Go forward in months

2. Use the navigation buttons described below to select the relevant month and year. The navigation buttons appear on the top of the Calendar window.
3. Click on the relevant dates in the **Calendar**.
   The selected dates appear in the date field.

Icons

The EMS application contains the following icons that are used for various purposes

Icon	Icon Name	Purpose
	Calendar Icon	Enables you to select a date in the "MM/ DD/YYYY" format.
	Help Icon	Enables you to view the help topics relevant to the page.
	About Icon	Enables you to view the version of the software you currently have installed.
	Home Icon	Enables you to navigate directly to the EMS Home Page from any module or page of the application.
	Delete Icon	Enables you to delete records from the EMS repository.
	Attachment Icon	Enables you to view the attachments in the Home page.
	Search and Select	Enables you to search for a record from the repository and select it from a displayed list of records.
	Clear Selection	Enables you to clear or remove a selected value for a record.
	Expand	Enables you to expand a section in order to view or modify data.

Search Criteria Icons

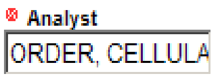
The search utility panel contains the following icons

Icon	Icon Name	Purpose
Search	Search Icon	Enables you to search the information from the EMS database based on the specified search criteria.
Clear	Clear Icon	Enables you to clear the values provided as filtering criteria.
More	More Icon	Enables you to specify additional parameters for search that are specific to your needs. For more information, see Filter Options and Operators.
	Ignore Case Icon	If the green circle is inside the gray circle, the application ignores the case sensitivity while fetching the records from the database. Click on the green circle, to leave only the gray circle and make the record search case-sensitive.

Mandatory Data for Saving Modules

There are portions in EMS that contain input fields that are mandatory for you to enter data to save or proceed to next module.

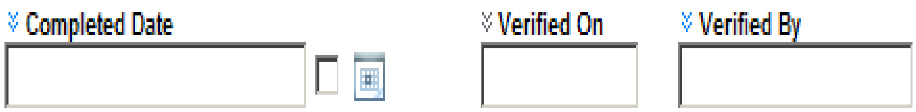
You can identify the mandatory fields with a red X at the beginning of the input field.
( ) **Mandatory Data** means that these fields are required before you can save the record.



Mandatory Data for Finalizing Request/SR Modules

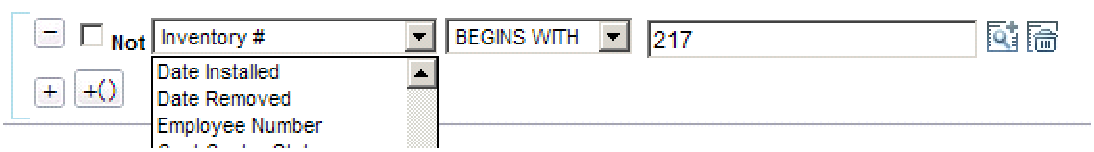
There are portions in EMS that contain input fields that are mandatory for you to enter data to finalize a Request or SR(s).

You can identify the mandatory fields with a blue arrow at the beginning of the input field.
( ) **Blue arrow** means that these fields are mandatory before you can finalize a Request or SR(s)



Suggestion Drop-Down

The Suggestion drop-downs in the EMS application prompts the available choices based on your input in a field.
For instance, when you begin to type in the inventory number field a number that begins with "2", the system prompts all of the available inventory numbers that contain the number "2". You can then select the relevant inventory in the Suggestion drop-down.



Icon Buttons:

Listed below are the navigation buttons and their definitions:

- **Edit icon** 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.
- Save **Save icon** to save the parameters of the page that you have defined.

- Export **Export icon** export the line items details to an excel sheet

- **View icon** to view and edit the details of the selected data.

- **Clear icon** clears the data previously selected in the box next to it.

  Ignore Case **Ignore Case** field helps with the speed the system performs a query search. Needs to be checked to search on upper case items

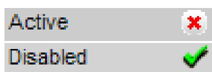
- **Go to the previous record**

- **Go to the next record**

- **Go to the beginning of the file**

- **Go to the end of the file**.

- ( ) **Mandatory Data** means that these fields are required before you can save the record.

- 

  shows the status of inventory

- Home » Requests List » **Requests** (breadcrumbs) these are page location designators located at top right and lower right side of page(s)

- The Previous ( ) and Next ( ) helps you navigate through the SR'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.

Using the Query Tool

There are some menus such as Inventory, Invoice, and Requests that contain a search utility. This search utility enables you to quickly locate the information based on your search criteria.

To search for specific information:

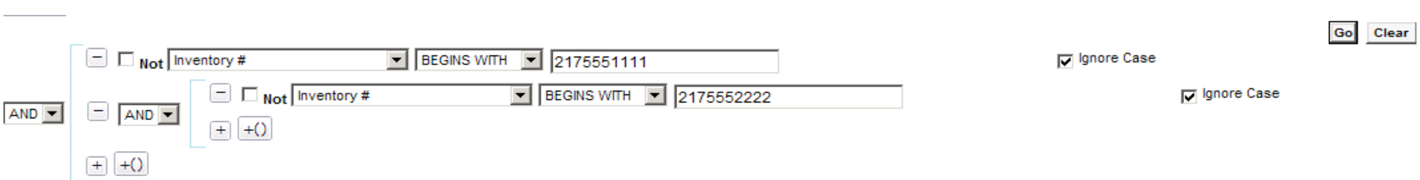
1. The **Search Utility** option appears in several list pages across the application:

2. The **Select Where** option has two fields. The first field is the Query field and the second field is the Constraint field. The options in the Constraint field vary based on the options selected in the Query field. This is explained in the examples given below:

   Operators provides list of operators based on which the data can be filtered depending on the option you select in the **Select Where** field.

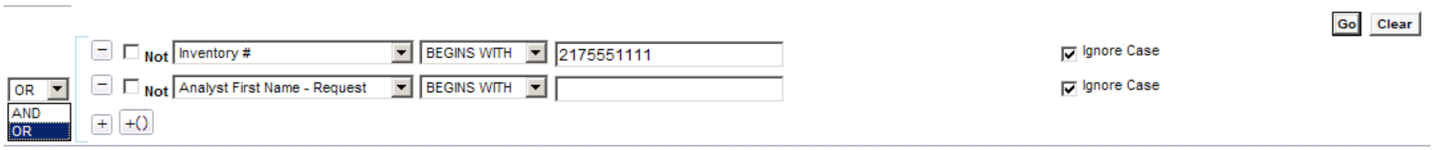
   The Operators field contains following options:
   - **BETWEEN** - Limits the data to the range that you specify in the **From** and **To** fields.
   - **> OR EQUAL** - Limits the data that is greater than or equal to the value you specify
   - **< OR EQUAL** - Limits the data that is less than or equal to the value you specify
   - **> THAN** - Limits the data that is greater than the value you specify
   - **< THAN -** Limits the data that is less than the value you specify
   - **EQUALS** - Limits the data that is equal to the value you specify
   - **LIKE** - Limits the data that is similar to the value that you specify
   - **ENDS WITH -** Limits the data that ends with the value you specify
   - **BEGINS WITH -** Limits the data that begins with the value you specify
   - **EXACTLY LIKE -** Limits the data that is exactly like the value that you specify
   - **LIST –** Allows one to search on multiple value**s.** When the pick helper is clicked, a pop-window appears. You can add valid records in this window and click **Save**.

   Note: ***Note:*** When using the list operator in the **List** pop-up window (appears when you click the pick helper), ensure you press Enter on your keyboard after each value. As there are no value separators, this step is mandatory.
3. The **Ignore Case** checkbox allows you to view all information irrespective of the upper case or lower case.
4. Click **Go** to initiate the search. The page is refreshed to display the information that matches the search criteria you have specified.
5. The & **More** button offers you the flexibility to specify additional parameters that are specific to your needs. This enables you to focus the search on just the information you need. ***Note:*** Select the check box before the **NOT** operator if you want to reverse the result of the search.
6. Nesting capability allows you to search on the same query types when using this functionality



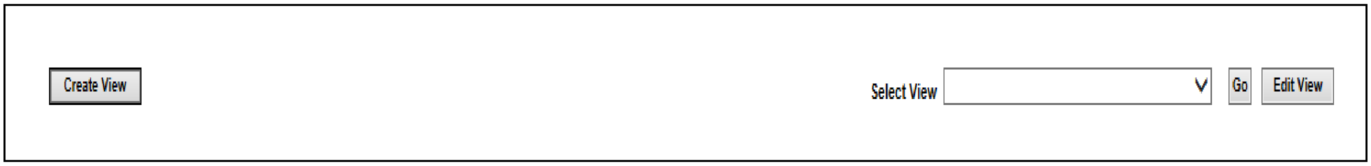
Nested Query Builder

The **AND** operator requires the results of the search criteria to be true for the combined expression to be true. If a record fails any of the tests, it is false. You can use the **OR** operator when you want to include records that pass only one of the two or more filters.



Advanced Query Builder

The Advanced Query Builder helps you to save your search queries. This feature appears under the Inventory and Requests modules.



To view your saved search

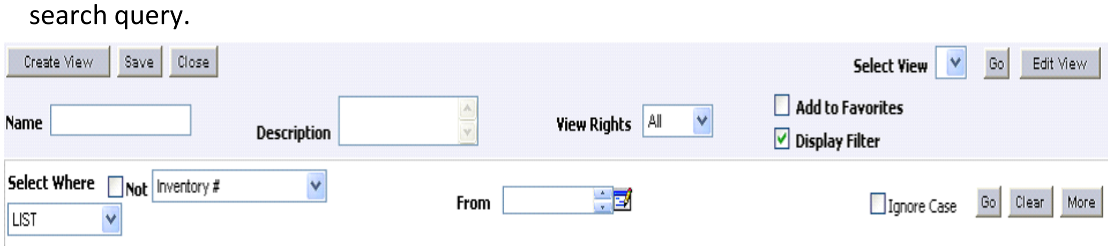
1. The **Advanced Query Builder** option appears in the following pages:
    - Inventory List page in the Inventory menu item
    - Active Invoice List, Balanced Invoice List, Approved Invoice List, Batch List, and Exception List pages in the Invoice menu item
    - Requests List page in the Requests menu item
2. In the **Select View** field, use the drop-down list to select the option for which you want to view details.
3. Click **Go**

Saving a Search Query

This section provide instructions on saving a search query

To save your search queries:

1. Once you have used the query tool to locate information, click **Create View** to save that search query.



2. In the **Name** field, enter a unique name to identify this saved search.
3. The **Description** field allows you to enter a description for the saved search.
4. Use the **View Rights** drop-down list to select the groups of users that will be granted permission for viewing the search query being configured. Options include:

- **All** - All users will be allowed to view this search query.
- **Owner** - Only the person creating the search query will be allowed to view this search query.
- **Role** - Users with the same role as the person creating the search query will be allowed to view this search query. This section provides instructions on saving a search query.

5. If you want this search query to appear on the Home page, click the **Add to Favorites** check box.
6. By default, the **Display Filter** check box is selected. If you do not want the Query Tool to be displayed, you can uncheck this check box.
7. Select the **Ignore Case** checkbox if you want to view all information irrespective of the upper case or lower case.
8. Click **Save**. All the parameters you defined are saved. The saved search is listed in the **Select View** drop-down list.

Editing a Saved Search

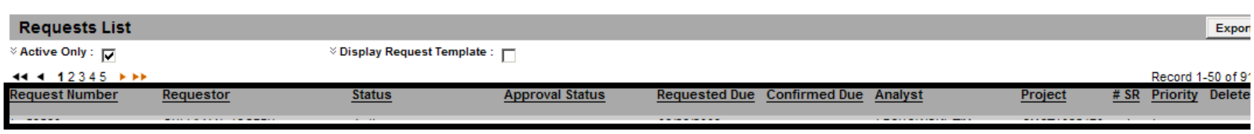
This section provides you instructions on editing a saved search.

To edit a saved search:

1. The **Advanced Query Builder** option appears in the following pages:
   - Inventory List page in the Inventory menu item
   - Active Invoice List, Balanced Invoice List, Approved Invoice List, Batch List, and Exception List pages in the Invoice menu item
   - Requests List page in the Requests menu item
2. In the **Select View f**ield, use the drop-down list to select the option for which you want to edit details.
3. Click **Edit View**. The page refreshes to display the result for the saved search.

Sort Feature

The Sort feature allows you to sort the data in the ascending or descending order. Each column header in all the List pages contains a hyperlink, which you can use to sort the data. When you click on a column header hyperlink, the data gets automatically sorted.



File Attachments (Requests Module)

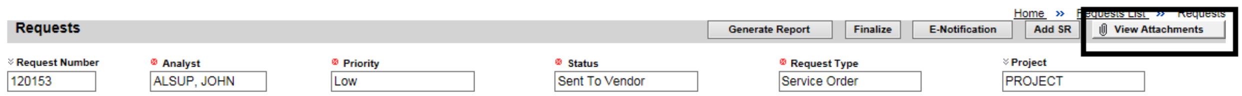
The Attachment feature helps you to attach any document/file, floor plan, etc. for particular request. The attachment can be emails that contain specific information, specific text files containing installation instructions, and other such details that would aid in the work being performed. Once attached, icon is displayed on the View Attachment button.
Note: The Attachment feature appears only for the Requests modules.

Viewing an Attachment

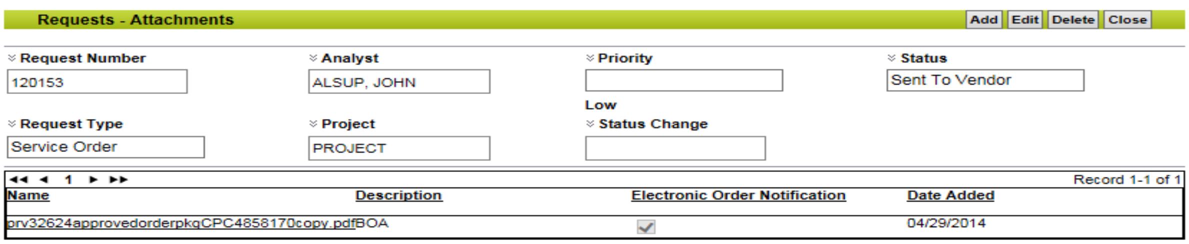
This section provides you instructions on viewing an attachment.

To view an attachment:

1. In the <**Requests**> page, click **View Attachment**.



2. The <**Request - Attachments**> window appears. This window displays all the attachments associated with the request. Click on attachment hyperlink to display attachment

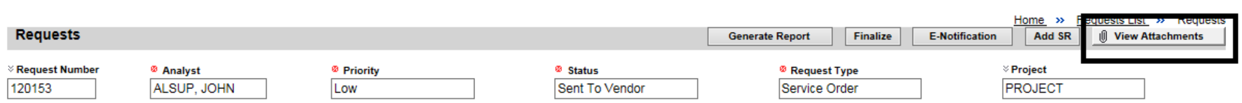


Adding an Attachment

This section provides you instructions on adding an attachment.

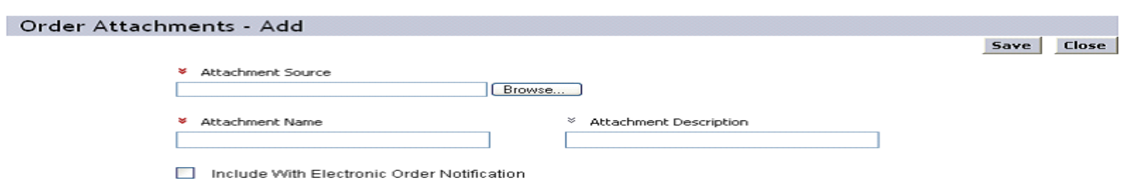
To add an attachment:

1. In the <**Requests**> page, click **View Attachment**. The **<Requests - Attachments>** window appears.



2. Click **Add**.

The <**Order Attachments - Add>** window appears.



3. In the **Attachment Source** field, use **Browse** to locate the file that has to be uploaded.
   Note: As all the files are stored in the same folder, ensure that the file name is unique for each attachment.
4. By default, the **Attachment Name** field displays the name of the attached file. Based on your requirements, you can choose to edit the attachment name.
   Note: Ensure that the **Attachment Name** is unique for each file.
5. In the **Description** field, enter the description for the attachment.
   Note: For attachments in the Requests module, select the **Include with Electronic Order**

Notification check box if you want to include this attachment in your Electronic Order Notification mail.

6. Click **Save**.
7. Click **Close**

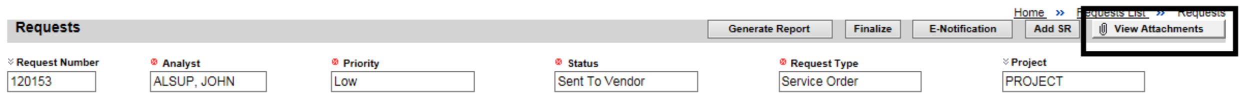
Note: After an attachment is added using the View Attachment button, an attachment icon is displayed on the View Attachment button.

Editing an Attachment

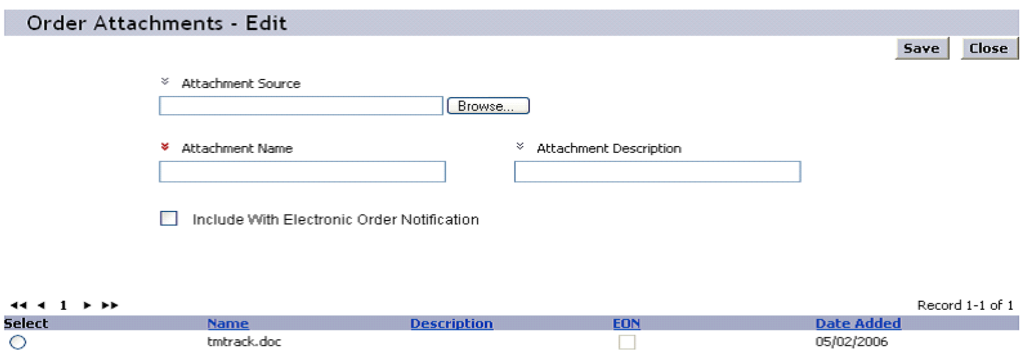
This section provides you instructions on editing an attachment.

To edit an attachment:

1. In the <**Requests**> page, click **View Attachment**. The <**Requests - Attachments**> window appears.



2. Click **Edit**. The <**Order Attachments - Edit**> window appears.



3. Select the radio button corresponding to the attachment you want to edit.

The **Attachment Name** and **Description** fields are populated with details associated with the selected attachment.

Note: You can use the Attachment Source field to replace the existing attachment with another file.

4. Click **Save**
5. Click **Close**

Deleting an Attachment

This section provides you instructions on deleting an attachment.

To delete an attachment:

1. In the <**Requests**> page, click **View Attachment**.
2. Click **Delete**.
   The <**Order Attachments - Delete**> window appears.
3. Select the checkbox corresponding to the attachment you want to delete.
   A confirmation prompt appears.
4. Click **OK** to continue.
   The attachment is deleted.

5. Click **Close**

Billing Module

Manual Charge Entry

Manual Charges are non-recurring charges that are applied against inventory items or Cost Centers.
These charges are manually entered through the Manual Charge Entry page to apply billing adjustments from a prior EOM Billing, applying vendor credits to specific Services, and/or assigning overhead charges.
These Manual Charges are created based on several selections on the Manual Charge Entry Detail page.

Viewing the Manual Charge Entry List (MCE#)

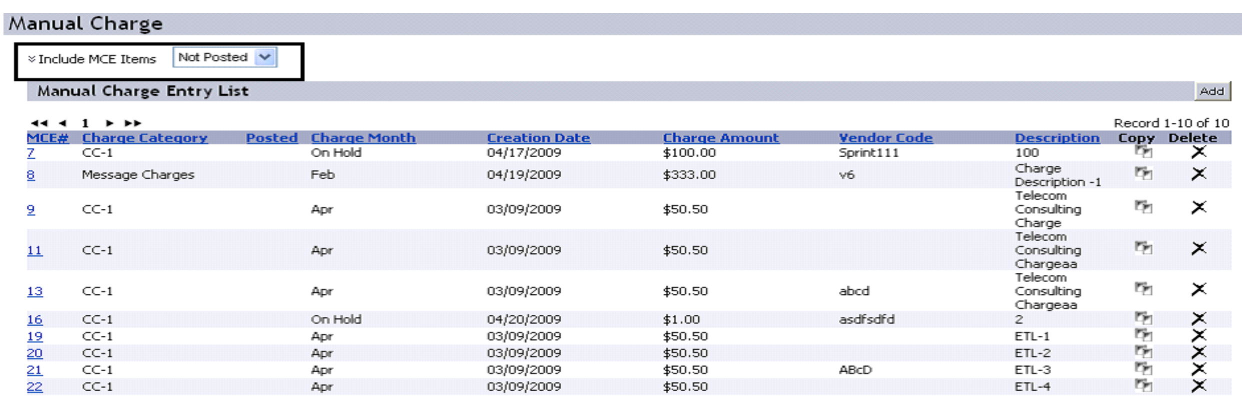
The Manual Charge Entry List page provides a list of all manual charge entries and the associated information. It provides information on the Manual Charge Entry number, Charge Category, the date the charge was Posted, Charge Month, Creation Date of the charge, Charge Amount, Charge Description.

The hyperlinks in the **MCE#** column provide a means to edit the Manual Charge Entry details.

To view the manual charge entry list:
1. Click the **Billing > Manual Charge**

Note: To see different stages of Manual Charges click on the drop down associated to the "Include MCE Items"

- **All –** See all Charges and Credits that have been processed
- **Not Posted –** Charges and Credits that have not been processed
- **Posted –** See only Charges and Credits that have been processed


Manual Charge
Include MCE Items Not Posted
Manual Charge Entry List
Add
1
Record 1-10 of 10

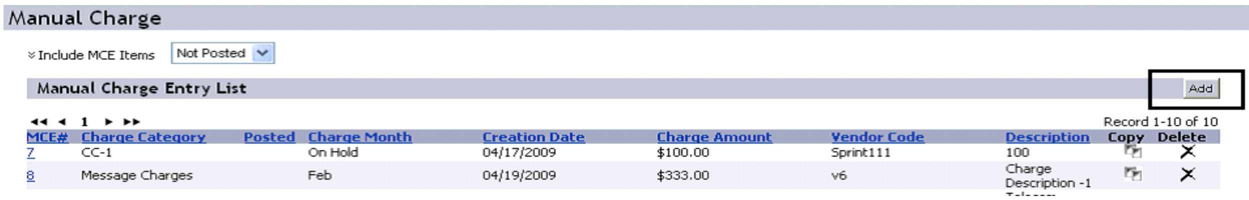
MCE#	Charge Category	Posted	Charge Month	Creation Date	Charge Amount	Vendor Code	Description	Copy	Delete
7	CC-1		On Hold	04/17/2009	$100.00	Sprint111	100		
8	Message Charges		Feb	04/19/2009	$333.00	v6	Charge Description -1		
9	CC-1		Apr	03/09/2009	$50.50		Telecom Consulting Charge		
11	CC-1		Apr	03/09/2009	$50.50		Telecom Consulting Chargeaa		
13	CC-1		Apr	03/09/2009	$50.50	abcd	Telecom Consulting Chargeaa		
16	CC-1		On Hold	04/20/2009	$1.00	asdfsdfd	2		
19	CC-1		Apr	03/09/2009	$50.50		ETL-1		
20	CC-1		Apr	03/09/2009	$50.50		ETL-2		
21	CC-1		Apr	03/09/2009	$50.50	ABcD	ETL-3		
22	CC-1		Apr	03/09/2009	$50.50		ETL-4		

Entering Manual Charge Details

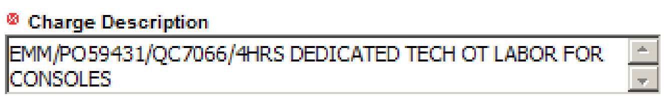
Manual Charges are created based on several selections on the Manual Charge Entry (MCE) Detail page. Based on the entries in this page, the Manual Charges are processed and transactions are created for the Billing, while the input transaction is updated with the “Posted” date.

To enter a manual charge:

1. Click the **Billing** > **Manual Charge**
2. Click **Add**

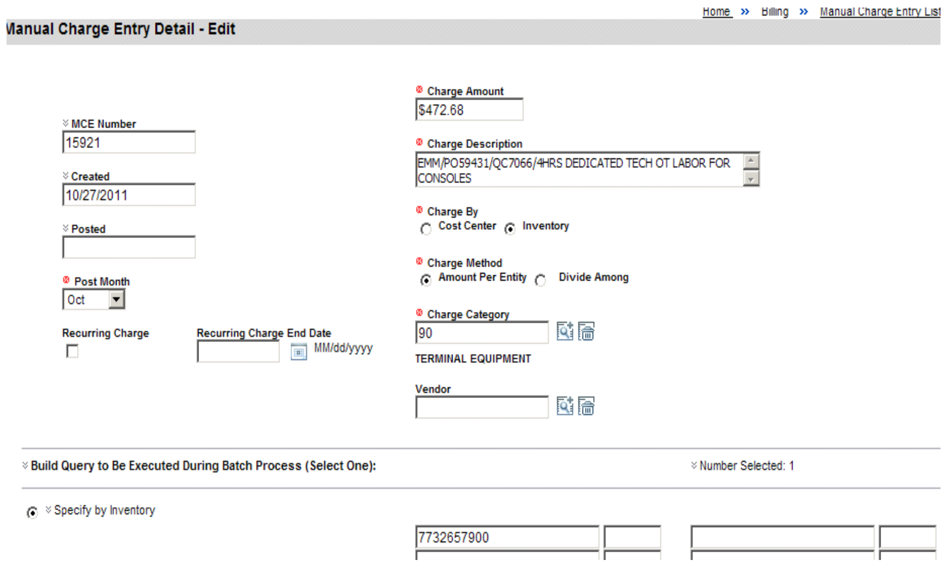


3. **Post Month** field, use the drop-down list to select the month in which this entry should be processed.
4. **Charge Amount** field, enter the amount that will be charged or credited to the cost center
5. In the **Charge Description** field, enter the following information
   - Analysts Initials
   - Request Number (if applicable)
   - Control Number (if applicable)
   - Description for the entry



6. **Charge By** field is used to indicate if the charges are by ***cost center*** or ***inventory item***
7. **Charge Methods** are used to determine how the charge should be broken out per inventory items.
   - **Amount per Entity.** This means that the amount entered in the charge amount is applied to each output billing transaction
   - **Divide Among.** This means that the amount entered in the charge amount will be divided by the number of records
8. **Charge Category** for billable charges or credits created by this manual charge entry

   Note: Can use the Search & Select icon ( ) to search on available Charge Categories



Editing Manual Charge Details

The manual charges that you enter are displayed in the Manual Charge Entry List page. You can click on the hyperlinks in the MCE Number column to edit the record.

To edit the manual charge entry parameters:

1. Click the **Billing > Manual Charge**.
   Note: This page allows you to edit any field associated with the manual charge entry.
2. Click **Save**. A message appears indicating that the record has been saved.
3. Click **Back**

Deleting Manual Charge Details

This section provides instructions for deleting a manual charge record.

To delete the manual charge parameters:

1. Click the **Billing** > **Manual Charge**.
2. In the **Delete** column, click on the delete sign corresponding to the manual charge entry that you want to delete.
3. The system deletes the manual charge entry and refreshes the page

Charge Summary

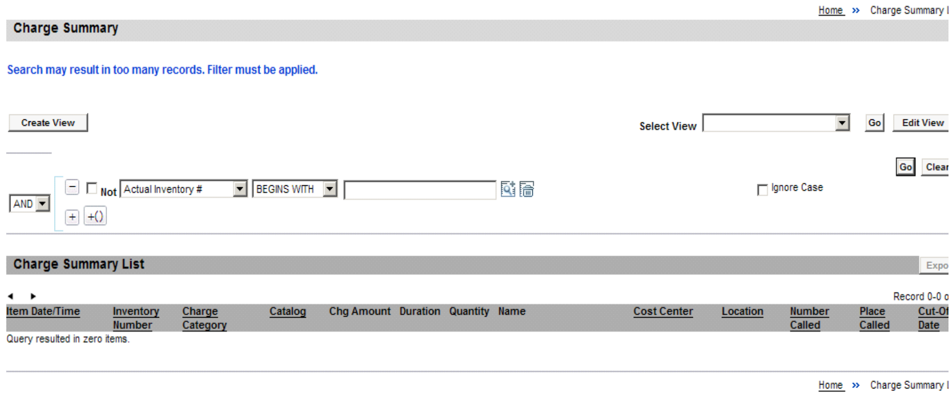
CRITICAL: ALWAYS UNCHECK THE IGNORE CASE BUTTON ON ALL QUERY SEARCHES WHEN WORKING IN CHARGE SUMMARY

The **Charge Summary** menu allows you to query records from the EMS database. You can click the hyperlinks in the Inventory Number column to edit any specific charge summary record. Based on your requirements, you can also export these charge summary records to an excel file.

Note: On opening the **Charge Summary List** page, no records are displayed by default. Instead, the message "**Search may result in too many records. Filter must be applied**' is displayed.

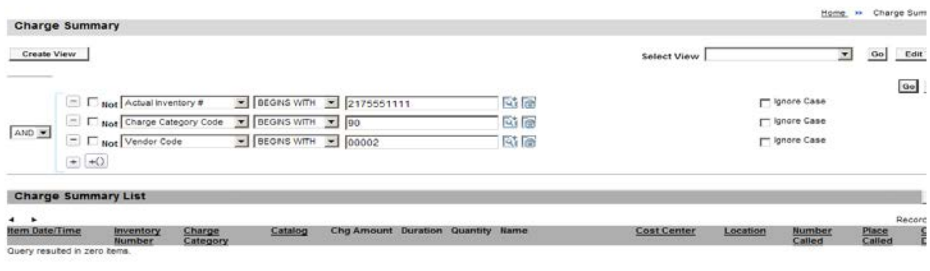
To view the charge summary list page:

1. Click **Billing > Charge Summary**



2. Enter the search criteria in the Select Where field(s)

   Note: If multiple search queries are needed make sure that the Ignore Case box is unchecked for each search query



3. Click **Go**

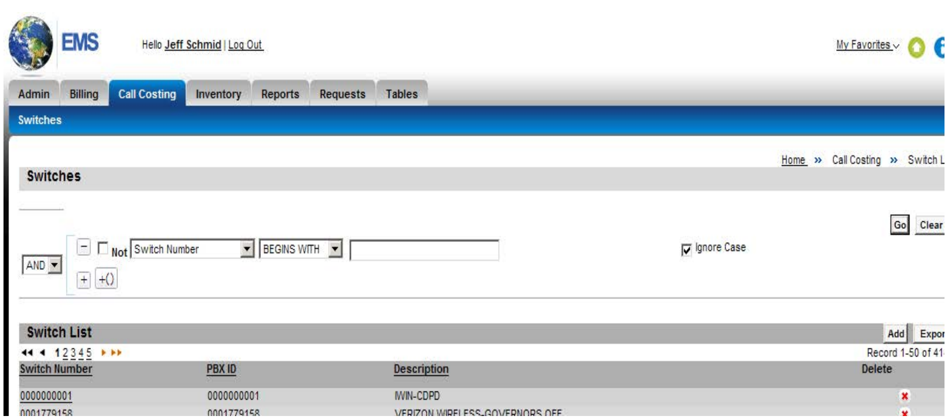
Call Costing Module

Inquiring or setting up a new Switch item

This procedure allows the user to Add a switch into EMS or inquire on existing switch item

Note: Before a Switch Custom label can be populated the switch number must exist in the Switch Database.

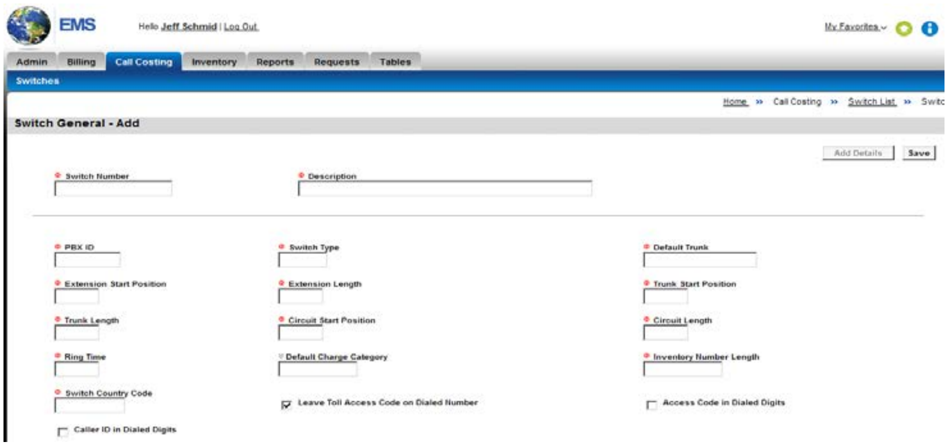
1. Click **Call Costing > Switches**



The **List Screen** will appear. You can use the **Select Where** search tool to look up a specific Switch Number

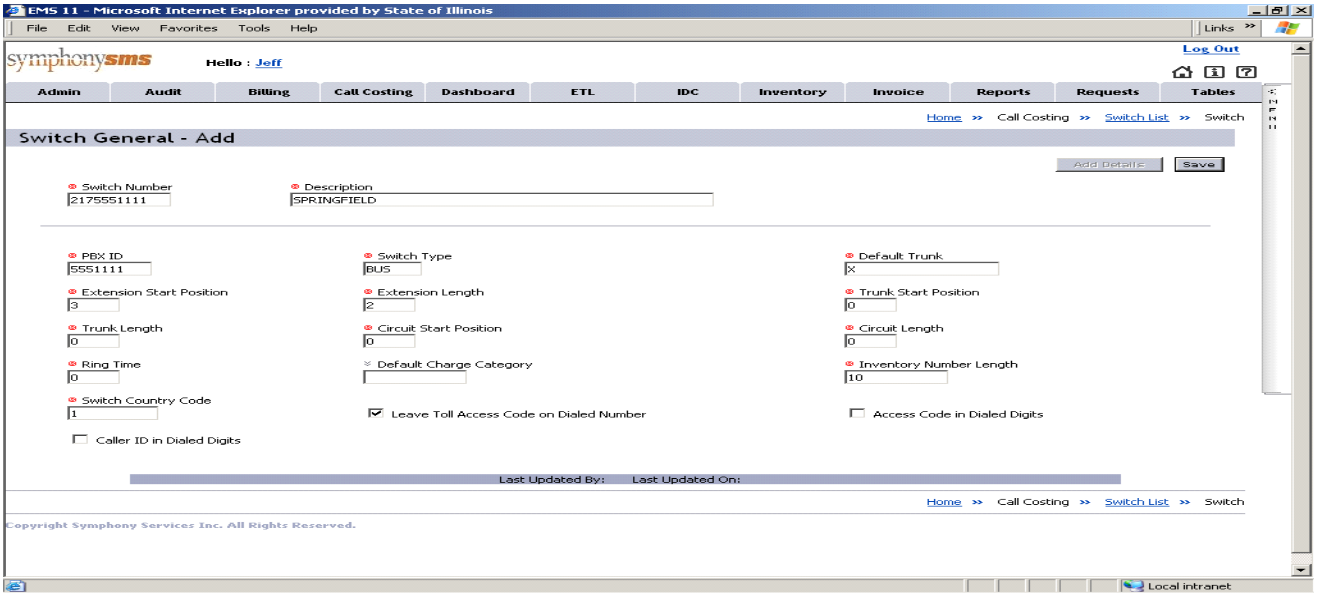
Note: There is no Query ability to determine if a switch number exists. You will have to list switch numbers in numerical order and search manually. You can arrange switch in numerical order by selecting the switch number in the column header. If does not exist continue to step 2.

2. Click on **Add** button



3. Populate each fields with information listed below. This will be done for all new switches.

Switch Number:	**Master Bill number**
Description:	**Agency, City**
PBX ID:	**Master Bill number (w/out area code)**
Switch Type:	**“BUS”**
Default Trunk:	**“X”**
Position:	**“3” = NON-CTX**
Extension Length:	**“2” = NON E911**
Trunk Start Position:	**“0”**
Trunk Length:	**“0”**
Circuit Start Position:	**“0”**
Circuit Length:	**“0”**
Ring Time:	**“0”**
Inventory Number Length	**“10”**
Switch Country Code	**“1”**
Default Charge Category:	**“blank”**
Special Rate Plan:	**“blank”**
Caller ID in Dialed Digits:	**“blank”**



4. Click **Save**

Inventory Module

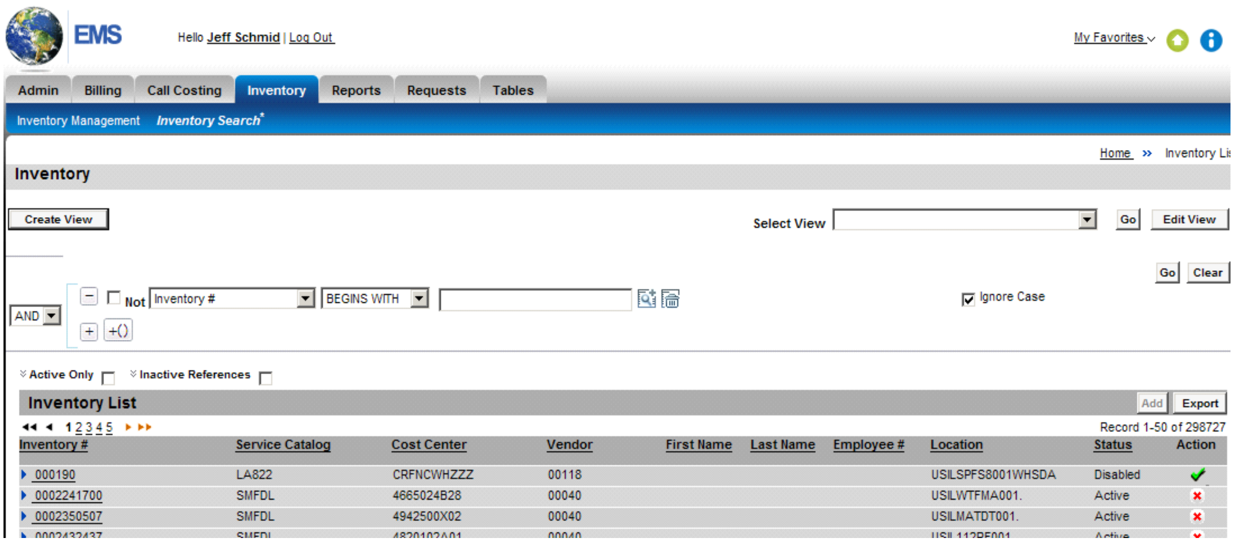
The **Inventory** module allows you to track items like voice, data, wireless, VoIP and network equipment, and manage all network components with one single centralized system. Service Orders automatically update the inventory thereby ensuring its accuracy.
Note: The values for these different frames are added, removed or edited in SR's which are built in a **Request.**

Viewing the Inventory List

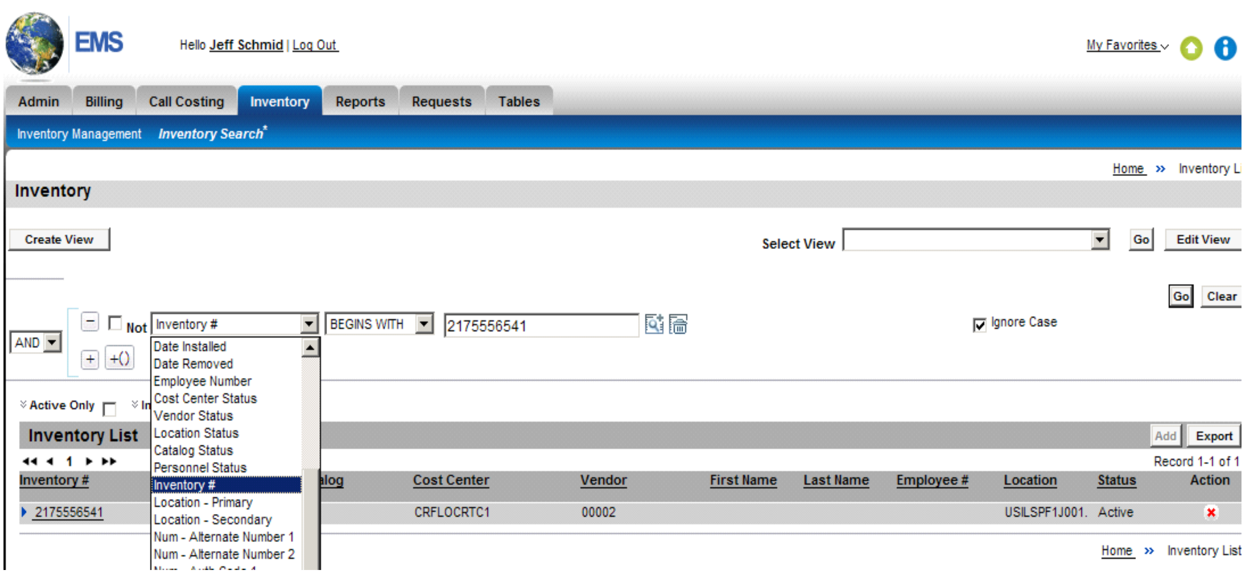
The **Inventory List** page displays all inventory items that have been added to the application. This page provides information on the inventory number, service catalog, cost center, first name, last name, location, and status of the inventory parameters that have been configured.

The hyperlinks in the Inventory Number column provide a means to view the inventory details

1. Click **Inventory > Inventory Search***
   This page lists out all the inventory items configured into the system. To narrow down the records listed on this page, you can use the query tool
   Note: By default, the Inventory # is in the search query. By using the More button (or) allows you to search on additional **Suggestion drop-downs**

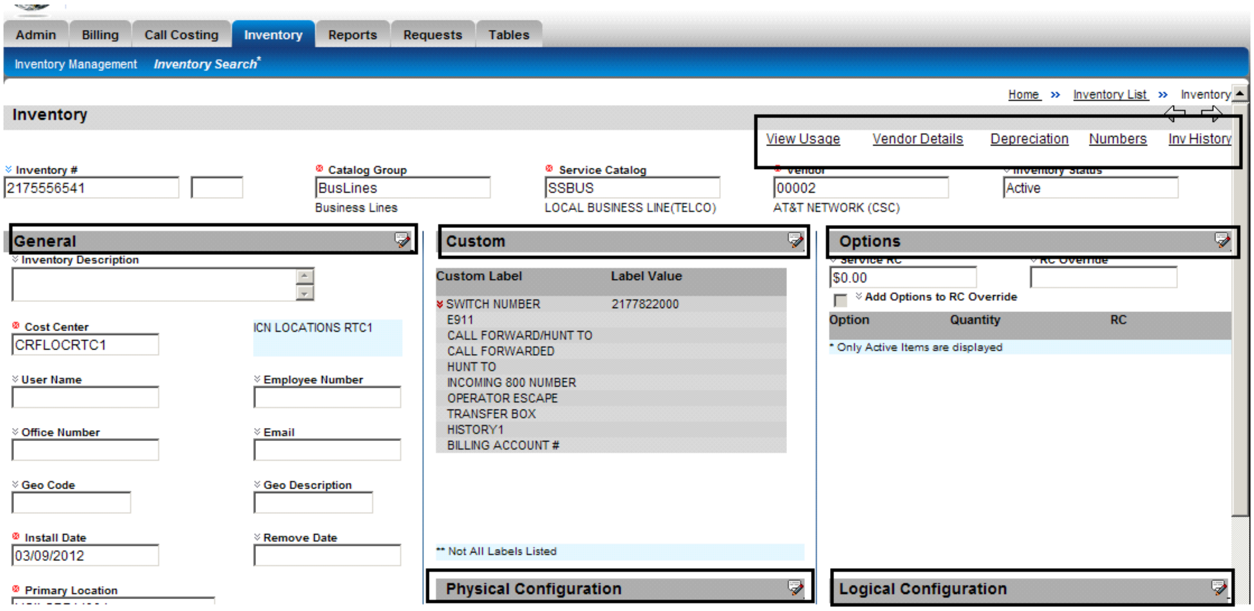


2. Click on Suggestion drop-downs to select search criteria
3. Enter search information in the query field



4. Click **Go**
This will provide you the inventory item(s) you are searching for. Click on the inventory hyperlink to obtain additional information that is unique to that inventory item.

- **Inventory General**
- **Inventory Custom**
- **Inventory Option**
- **Inventory Physical Configuration**
- **Inventory Logical Configuration**
- **Inventory History (hyperlink)**
- **View Usage (hyperlink)**



Inventory General

This section provides information on the inventory item that you selected from the **Inventory List** page.

To review the inventory general parameters:

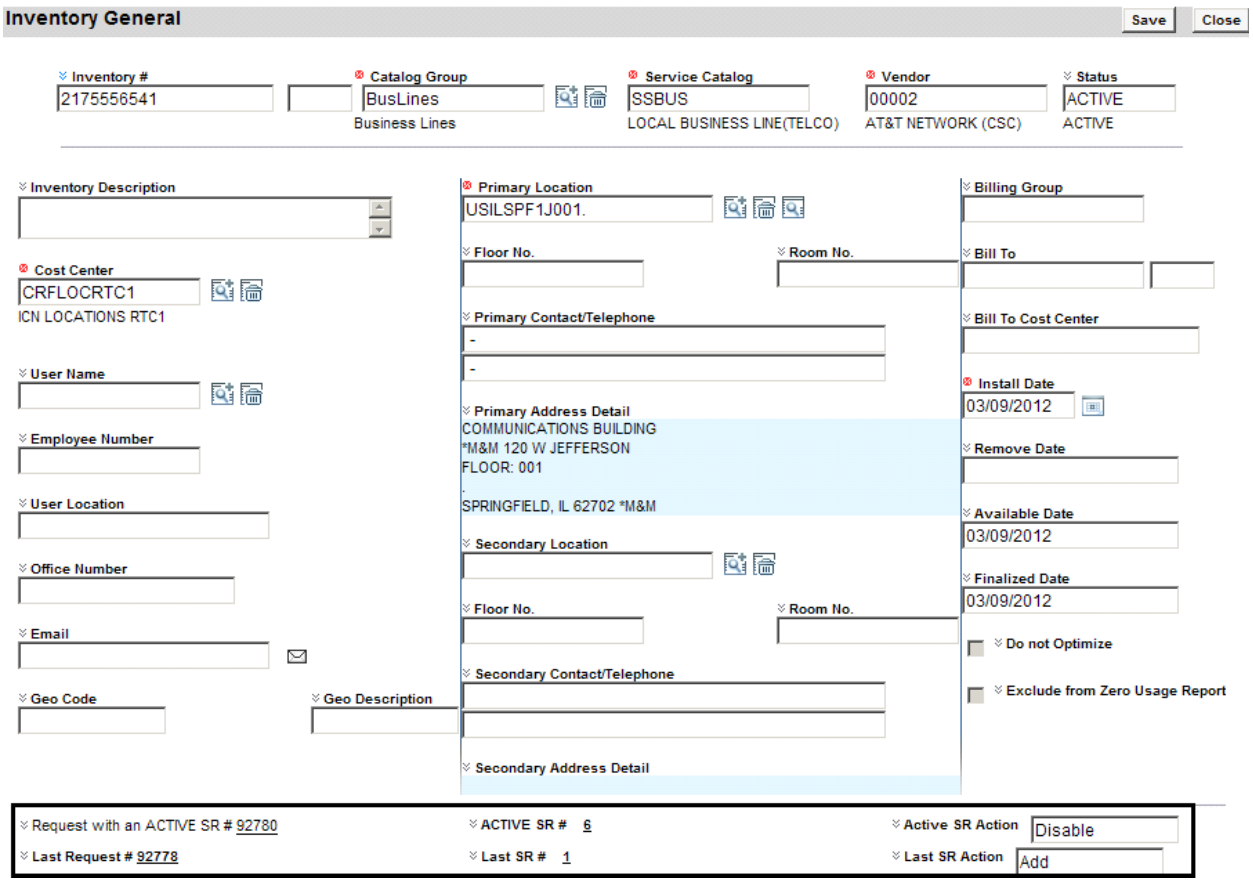
1. In the **Inventory** page, click on the **Edit** ( ) hyperlink in the **General** section

- **Inventory Description** field shows information related to this inventory item
- **Cost Center** field, shows billable cost center
- **User Name** field represents the name of the user associated with this inventory item
- **Primary Location** field represents the permanent location of the inventory item
  Note: Address information is pulled from what is assigned to the location code in the location database
- **Secondary Location** field represents the location used to specify the secondary location for the inventory item
- **Installed** field represents the date on which this inventory item was installed.
- **Removed** field represents the date on which this inventory item was disabled.
- **Available** field represents the date on which the status of this inventory item changed from disabled to available

Also provided in this module show any current or past Request / SR on the inventory item
Note: Provides hyperlink functionality to "view only" current/past Request and SR

- **Request with an ACTIVE SR#** provides a hyperlink to the most recent active request for this inventory item
- **Active SR#** provides a hyperlink to the most recent active SR (Service Request) for this inventory item.

- **Active SR Action** represents the most recent active SR action that was taken for this inventory item. This is a view-only field.
- **Last Request #** provides a hyperlink to the last finalized request for this inventory item.
- **Last SR #** provides a hyperlink to the last finalized SR (Service Request) for this inventory item.
- **Last SR Action** represents the last finalized SR action that was taken for this inventory item. This is a view-only field.

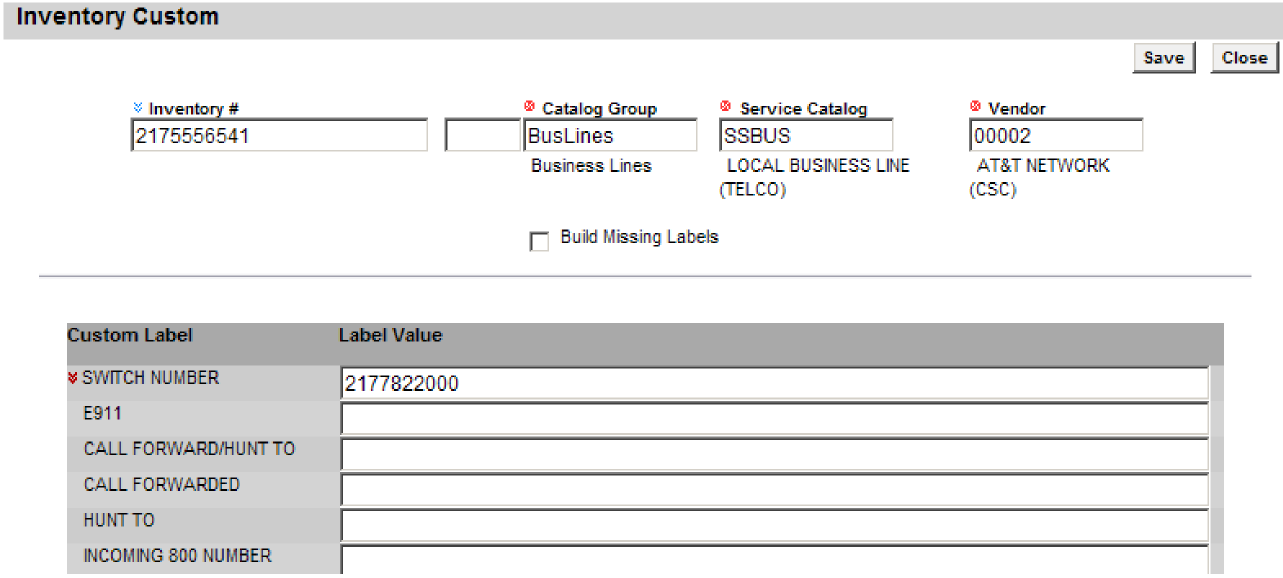


Inventory Custom

This section displays custom fields associated with the service catalog selected for the inventory item. These custom fields enable you to capture additional inventory data. A custom field consists of a label and a value. The types of custom fields available are text, amount, date, numeric, and comments.

To review the inventory custom fields:

1. In the **Inventory** page, click on the **Edit** ( ) hyperlink in the **Custom** section
   The **Inventory Custom** window appears. This window allows you to view the custom fields associated with this inventory.

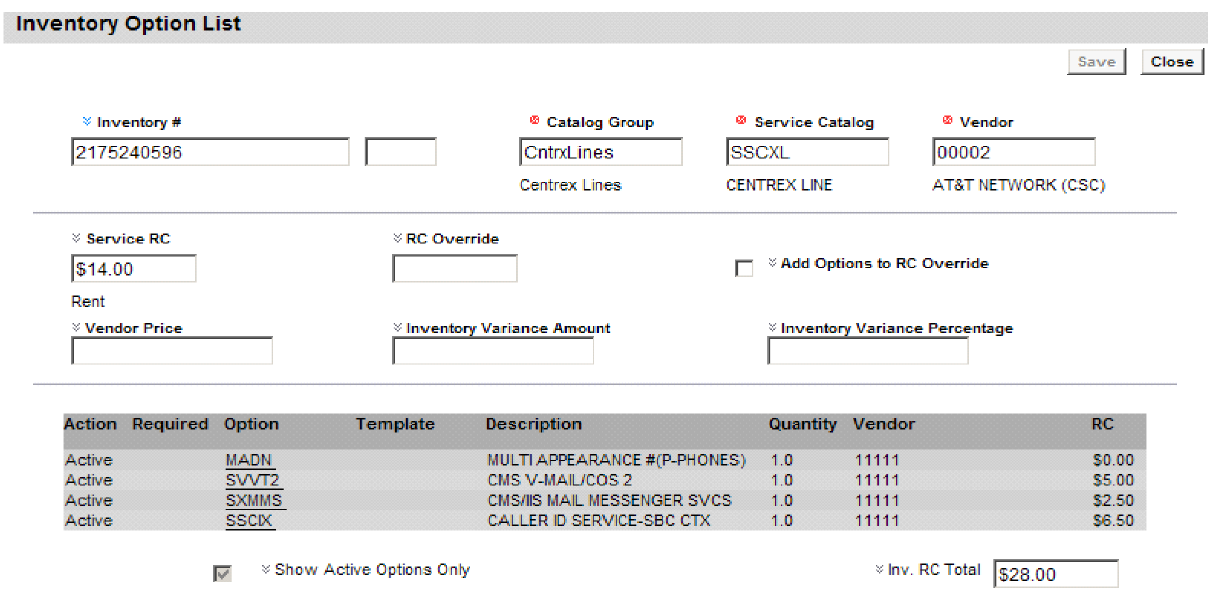


Inventory Option

Options are features, services, parts, or actions (i.e. labor hours) that are associated with the service catalog selected for the inventory item. The Options section enables you to view recurring charges for options related to the inventory item.

To review the inventory options parameters:

1. In the **Inventory** page, click on the **Edit** ( ) hyperlink in the **Option** section
   The **Inventory Option** window appears. This window allows you to view the Options that are associated with this inventory. These options can be informational use or have billing associated them. These option codes are assigned to the Service Catalog code.
   Note: Contact your system administrator if an option needs to be added to the Service code



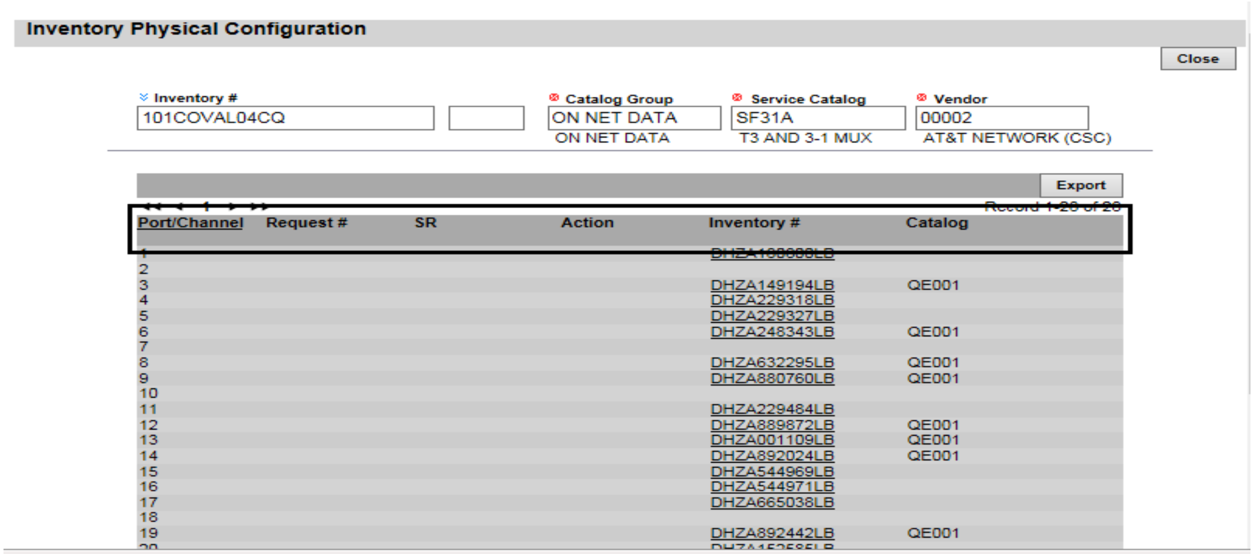
Inventory Physical Configuration

This section is set up to display a device (inventory item) and all channels, ports, inventory items, and so on that are connected to it.

Note: The physical configuration of inventory items is assigned in a **Request/SR action**.

To view the physical configuration of inventory items:

1. In the **Inventory** page, click on the **Edit** ( ) hyperlink in the **Physical Configuration** section The **Inventory Physical Configuration** window appears. This window allows you to view the Inventory that is associated with it.



- **Port or Channel** column lists the port records associated with the current inventory item specified on this window
- **Request #** column lists the request number for inventory items "attached" to the physical inventory item that is still part of an active SR
- **SR** column lists the SR number for inventory items "attached" to the physical inventory item that are still part of an SR that is yet to be finalized
- **Action** column lists the SR action associated with the SR and is displayed only if the request and SR number are also displayed
- **Inventory #** column lists the inventory item assigned to this port or channel.
- **Catalog** column lists the description of the service catalog

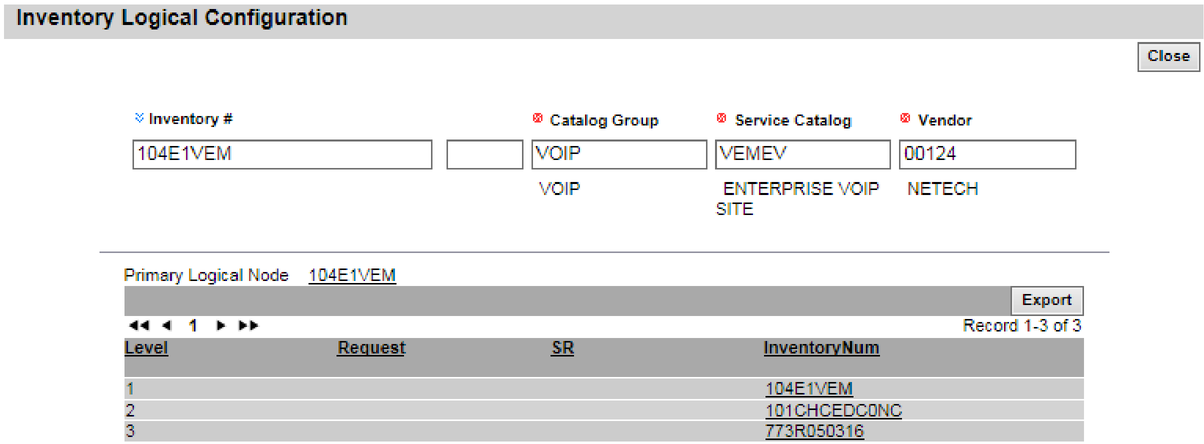
Inventory Logical Configuration

This section provides information on how a series of inventory items are logically connected together. In a logical connection, one part is assigned as the primary logical node (PLN) or top of the configuration. There can be only one PLN in a logical configuration. Also an inventory item can only be assigned to one logical configuration. There can be multiple levels within a Logical Configuration.

Note: The logical configuration of inventory items is defined through the **Requests** module.

To view the logical configuration of inventory items:

1. In the **Inventory** page, click on the **Edit** ( ) hyperlink in the **Logical Configuration** section. The **Inventory Logical Configuration** window appears.



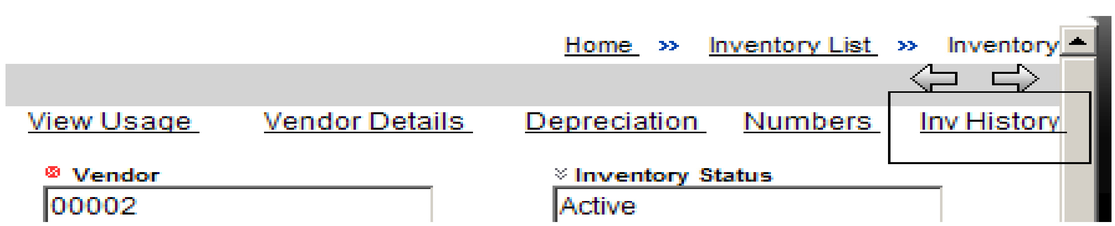
- **Level** column lists the levels associated with the PLN. These numbers are set when an inventory item is assigned or attached to another inventory item in the logical configuration.
- **Request** column lists the order numbers to which inventory items that are “attached” to the logical configuration and are assigned to an active Service Request. Inventory items can be connected together in a service request where all inventory items that are part of the logical configuration are in various service requests and not in inventory.
- **SR** column lists the inventory items "attached" to the logical configuration and which are still a part of an active SR. The associated Request number is also displayed.
- **Inventory Number** column lists the inventory item in the logical configuration.

Inventory History

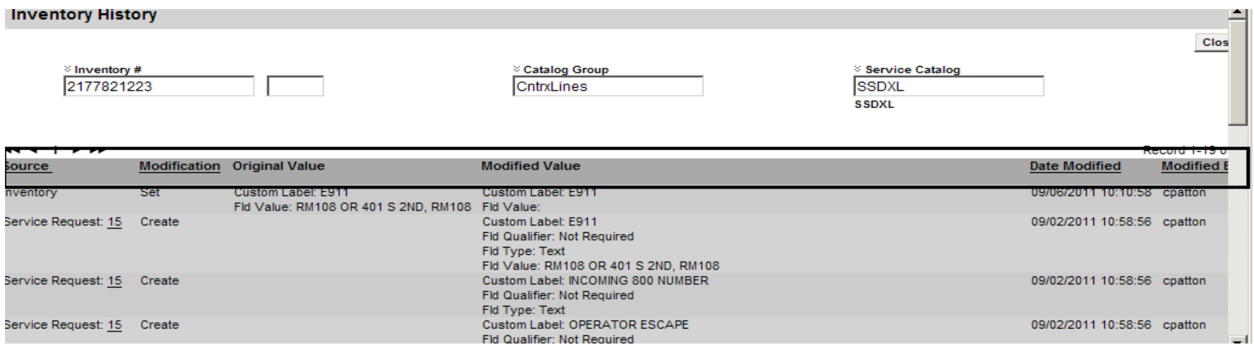
All actions performed on an inventory item are recorded by the system along with the date stamp and name of the user that made the change. As an inventory item undergoes a change due to some process or function, a history record is added to the inventory item history list. Inventory items modified through the Requests Module are also tracked through the Inventory History functionality. Again, if an ETL process adds, updates, or deletes any inventory records, the system registers these events as history records for the inventory item.

To view the inventory history:

1. In the **Inventory** page, click on the **Inv History** hyperlink. The **Inventory History** window appears.



- **Source** column lists the name of the module that affected the action on the inventory item
  Note: If the inventory item is modified through the Service Requests module, the corresponding SR number is provided as a hyperlink. Click on the hyperlink to view the details of the SR.
- **Modification** column lists the type of action performed on the inventory item.
- **Original Value** column lists the values that were assigned to the inventory item before it underwent a change.
- **Modified Value** column lists the new values that are assigned to the inventory item.
- **Date Modified** column lists the date when the action was performed on the inventory item.
- **Modified By** column lists the name of the user that performed the change the inventory item.



Request Management

The **Requests** menu item automates the job of placing and tracking Requests for equipment and services. Through the use of a centralized catalog, requests provide you control overall requests for service, internal pricing, vendor pricing, qualified vendors, and available options.

A Request consists of general information pertaining to all services and equipment in the Request, and Service Requests, which describe the individual pieces of equipment or services which make up the Request.

Adding a Request

1. Click **Requests > Request Entry***

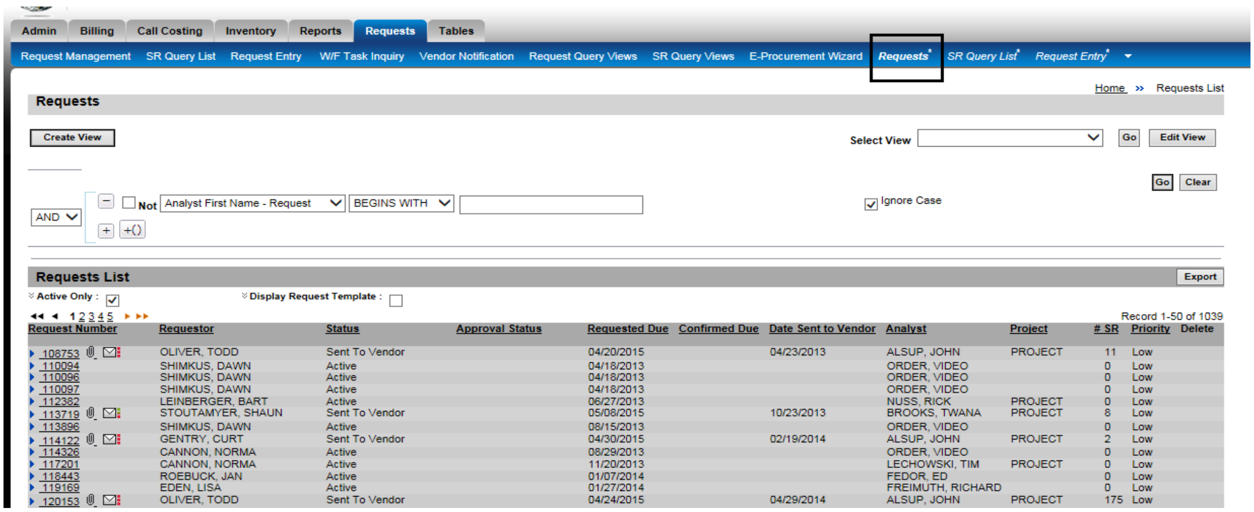
The Request Entry menu item is used to create the general information or “cover page” for a Request for service.   A Request can contain many Service Request (SR’s) pertaining to equipment and services. An SR can perform various functions for equipment’s or services such as install, disable, number change, relocate, change, reinstate, and so on that will be updated in the Inventory file.   No changes are made in inventory until the Request/SR is finalized.

Note: for Business Rules and Screener criteria refer to EMS Logger and Screener M&P (TC 020 v 1 Logger and Screener.pdf)

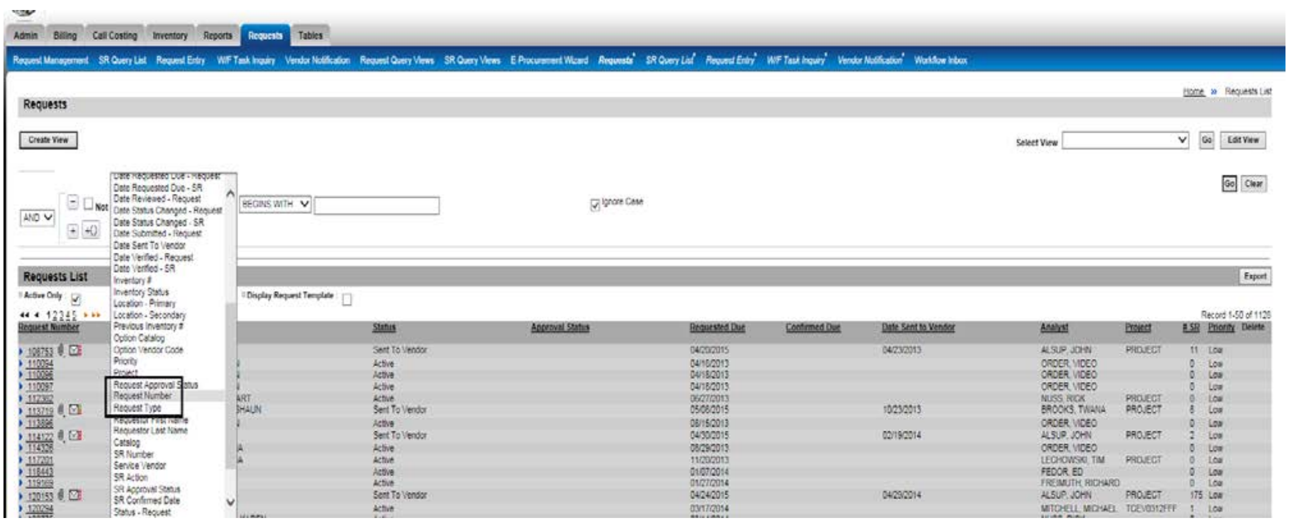
https://bccs.portal.illinois.gov/exec/centrep/cam/csctel/Pages/pm.aspx

Opening an existing Request

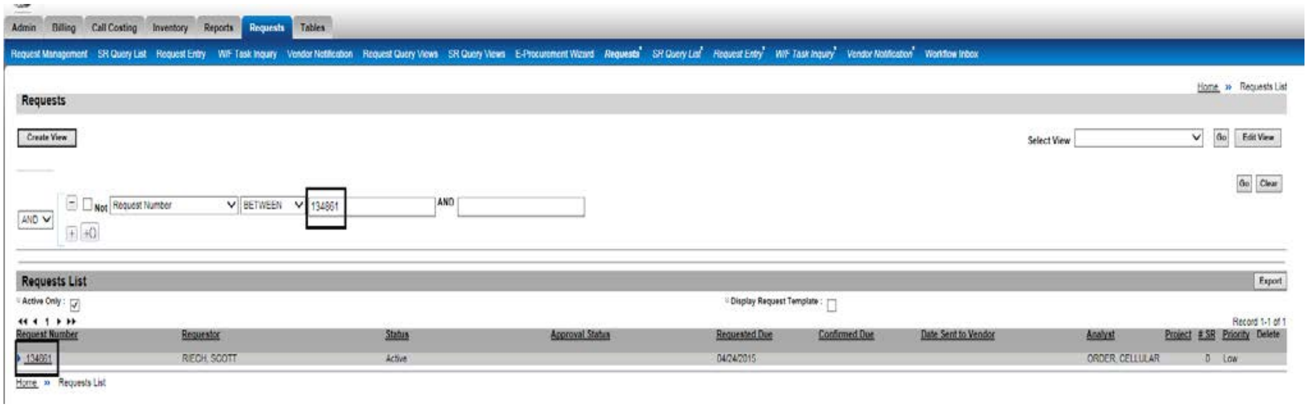
1. Click **Requests > Request***



2. Click on Suggestion drop-downs to select search criteria



3. Enter search information in the query field
   Note: Most cases the Request number will be entered in the query field
4. Click **Go**
5. Select the **Request number hyperlink** to go into request



Request Details

1. **Requests > Request* > Request Number hyperlink**

   NOTE: To be able to add, edit and/or research additional information it is required that you click on the **Edit** buttons (**)** located in the title of each section.

   General Section – The Request General section contains the stake holder details of a request. The Request General Section contains the following fields:

   Request # field is a sequential number, system-generated when the Request is saved.
   Analyst field specifies the name of the individual writing the Request
   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, Sent to Vendor, Reviewed, 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 project code for the project under which service or equipment is ordered.

   - Complete the project field using the Project Field Task Template, titled **Addendum 1** located on pp 45 & 46, at the end of this document

   Status Change field located in the Requests General portion, the date displayed in this field is system-generated after you click Save
   Requestor field is populated with the name of the person submitting the Telecom Request form

   - Search and Select button – to be used when populating this field. Directs you to the Personnel table when clicked on
   - removes data from field
   Add Button – to add Requestor to Personnel table
   - search and select button takes you to Personnel table to review requestor
   Query by Request button allows you to view a complete list of requests in the system for the same requestor.

   Phone field displays the requestor's office number after the Request has been saved.
   Note: This field displays a phone number only if the office number exists in the Personnel file.
   Request Description field is used for description about the Request, specifying specific work by vendor(s)

Requested Due field shows due date of work to be completed
Submitted field displays the date when the request was initially entered in the system and is system generated after the request has been saved
Alternate Request # Defines an alternate request number that the application uses while updating the request details using the corresponding ETLs (optional)
Locations Description field allows one to enter additional specific access requirement information where the service is to be installed, and/or any other pertinent information (i.e. security issues) ***Use only if needed***
NRC Cost Center specifies the cost center that must be billed for the non-recurring charges (NRC) or the one-time charges for all the SRs. If this field is not used, the recurring cost center is used for NRC charges. **Use only if billing needs to be separated from MRC costs**
MRC Cost Center specifies the cost center that must be billed for the monthly recurring charges (MRC) for all the SRs.
Note: The cost center is provided by the Telecom coordinator and must be valid
Although this is not a system-required field, it is required for provisioning. This field sets security for Telecom Coordinators to be able to see only their Requests.

Additional Buttons

Additional buttons on the **Requests General** page also provides the following additional functions:
Generate Report - Activated to generate a PDF file that contains details about the Request. This report contains information for a vendor or technician to complete the work on the request. For example, if an inventory has been moved to a different location, then the report will contain the old and new Primary and Secondary locations for that inventory.
Finalize - Activated to initiate the finalization process for a Request. The finalization process will close the request and update the inventory. The Request must first be Completed before it can be Finalized. When the Request is finalized, all the SRs contained in the request that are completed correctly will be finalized.
Note: The SR(s) that are not correct will generate an error message giving the reason for the error and placed into a "Completed" status so that the error(s) can be corrected.
E-Notification – when activated will send an email related to a Request to the vendor (see page 1234). The report generated is listed in the Request Prints menu under the Reports module.
Add SR – when activated this will allow one to generate an SR(s) that will be used to keep inventory up to date.
Note: can generate multiple SR's
Save – will save changes
Close – this will take you back to the Main Request screen that show all of the partitions

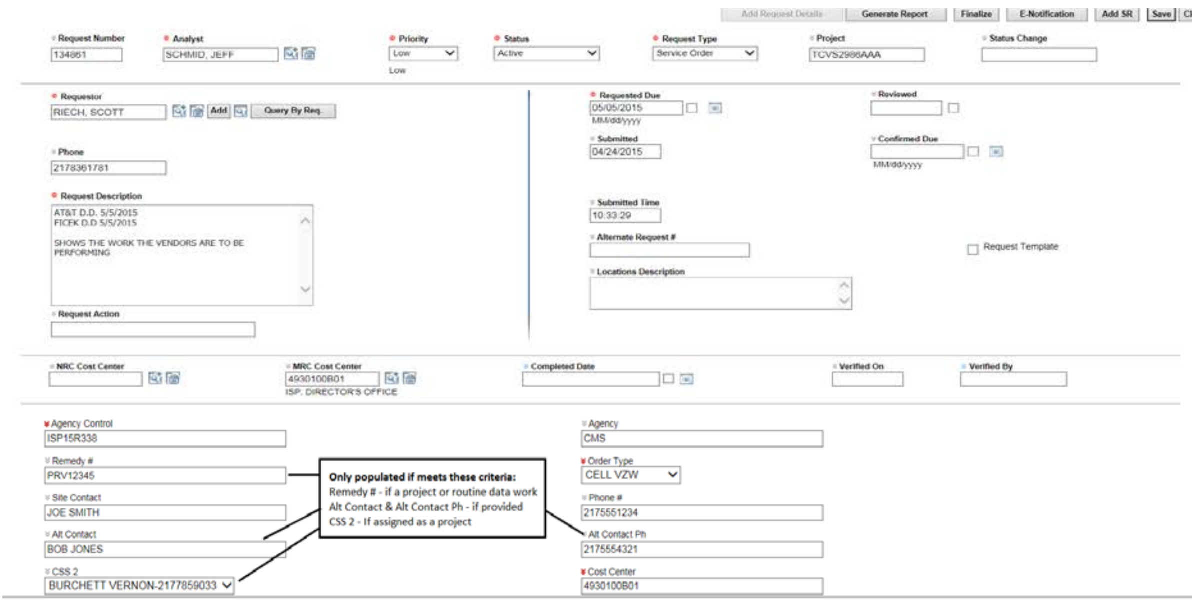
Note: Analyst working the orders - it is your responsibility to make sure these fields are correct. Please review it and correct it if needed. Some fields are populated by the Loggers.

Agency Control (if Logger did not add info) Alphanumeric characters only, drop any special characters (i.e. "/", "-", etc.)
Agency requesting the work
Remedy # ***(if one exists)*** will be entered as PRV#####

<u>Order Type</u> – *populated* with one of the following:

SPFLD DED	IWIN
CHGO DED	DATA
CELL	VIDEO
VOICE	VOIP

<u>Site Contact</u> and **<u>Phone #</u> *(if one exists)*** shows site contact name along with phone number
Note: This needs to be someone at the location the work is being performed
<u>Alt Contact</u> and **<u>Alt Contact Ph</u> *(if one exists)*** same rules as the Site Contact and Phone #
<u>CSS 2</u> *(if a project)* dropdown showing the CSS 2 who is the project manager
<u>Cost Center</u> field displays the Cost center code provided by the Agency Telecom Coordinator

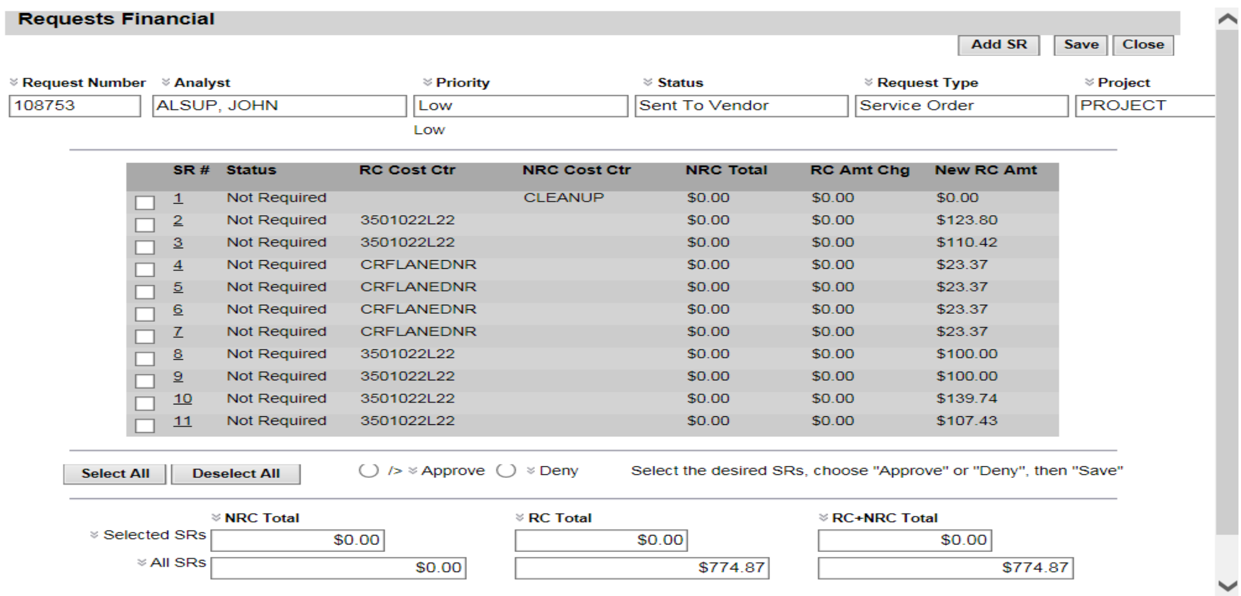


2. Click **Save** after all information has been entered **(**A message of "**Record updated successfully**" should appear)

<u>Financial Section</u> - The Financial section enables you to view and define estimates for the SRs.
Note: system generated when creating SR(s)
The Financial section contains the following fields:

<u>Estimate Description</u> - Provides an area to enter the description about the estimated cost associated with the request.
<u>Estimated Nonrecurring</u> - Specifies the one-time cost or the non-recurring cost estimate for the request.
<u>Estimated Recurring Cost</u> - Specifies the recurring cost estimate for the request.
<u>Total Estimated Cost</u> - Specifies the sum of the non-recurring and recurring costs estimate for the request.
<u>Approval Estimate Status</u> - Displays the status of the financial approval that has been sent to the approver. This field displays one of the following values based on the request status such as; Waiting Approval, Approved, and Denied.

SR List Grid - Displays the list of SRs associated with the request that can be financially approved or denied.
Selected SR's NRC Total - Displays the sum of the non recurring charges (NRC) charges for the selected SRs of a request.
Selected SR's RC Total - Displays the sum of recurring charges (RC) for the selected SRs. The application considers the total of all the charges on the SRs.
Selected SR's RC+NRC - Displays the sum of recurring and non-recurring amounts for the selected SRs.
All SRs NRC Total - Displays the sum of NRC charges for all the SRs associated with a request.
All SRs RC Total - Displays the sum of the recurring charges. .
All SRs RC+NRC Total - Displays the total of the New RC and NRC amounts for all the SRs in the service request.

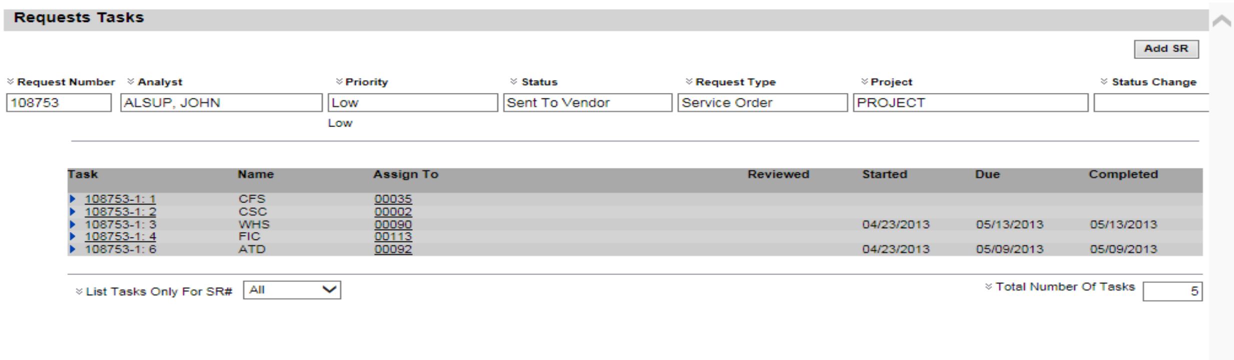


Tasks Section - The Tasks section enables you to assign all vendors associated to the work being performed and track their due dates to determine if work is completed on time

Tasks Section - All vendors will show that work in a particular telecom division. We are able to track all vendors involved on the order. Nothing will appear until the assigned TASKS Template is selected. After template is selected vendors will appear. At this time you select the vendors needed to perform the work and assign Start Date, Due Date and Completed Date (this is done when work has been completed)

Note: This task list is created on SR#1 as a General Supply SR action. Refer to TASKS M&P for instructions on how to create

https://bccs.portal.illinois.gov/exec/centrep/cam/csctel/Pages/pm.aspx



Requests Tasks

Add SR

Request Number	Analyst	Priority	Status	Request Type	Project	Status Change
108753	ALSUP, JOHN	Low	Sent To Vendor	Service Order	PROJECT	

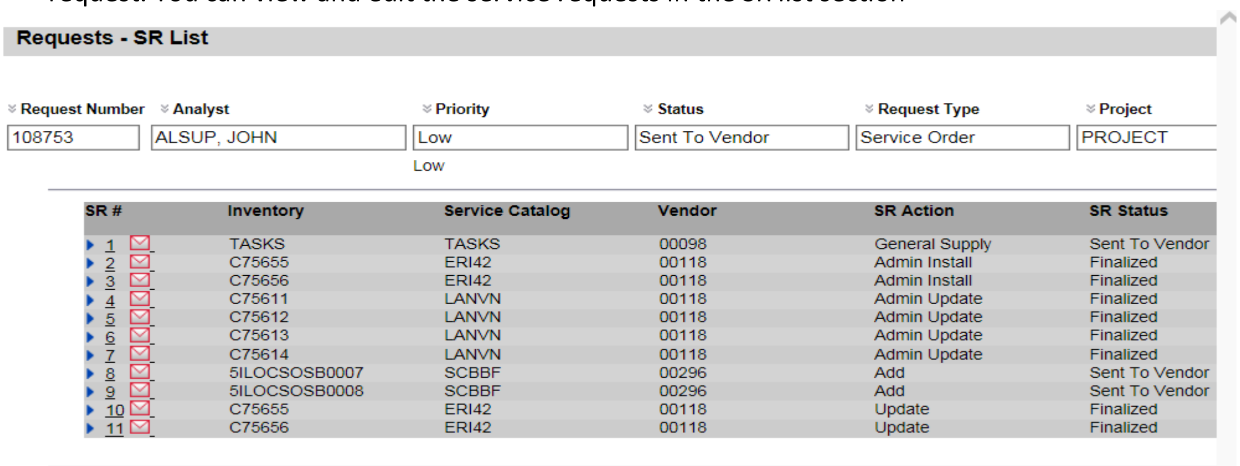
Low

Task	Name	Assign To	Reviewed	Started	Due	Completed
108753-1: 1	CFS	00035				
108753-1: 2	CSC	00002				
108753-1: 3	WHS	00090		04/23/2013	05/13/2013	05/13/2013
108753-1: 4	FIC	00113				
108753-1: 6	ATD	00092		04/23/2013	05/09/2013	05/09/2013

List Tasks Only For SR# All

Total Number Of Tasks 5

SR Lists portion – The SR List section provides a list of service requests that are associated with a request. You can view and edit the service requests in the SR list section



Requests - SR List

Request Number	Analyst	Priority	Status	Request Type	Project
108753	ALSUP, JOHN	Low	Sent To Vendor	Service Order	PROJECT

Low

SR #	Inventory	Service Catalog	Vendor	SR Action	SR Status
1	TASKS	TASKS	00098	General Supply	Sent To Vendor
2	C75655	ERI42	00118	Admin Install	Finalized
3	C75656	ERI42	00118	Admin Install	Finalized
4	C75611	LANVN	00118	Admin Update	Finalized
5	C75612	LANVN	00118	Admin Update	Finalized
6	C75613	LANVN	00118	Admin Update	Finalized
7	C75614	LANVN	00118	Admin Update	Finalized
8	5ILOCSOSB0007	SCBBF	00296	Add	Sent To Vendor
9	5ILOCSOSB0008	SCBBF	00296	Add	Sent To Vendor
10	C75655	ERI42	00118	Update	Finalized
11	C75656	ERI42	00118	Update	Finalized

Contacts Section - The Contact section enables you to provide the contact information for a request. You can select up to three contacts from the personnel records for a request.

The Contact section contains the following fields:

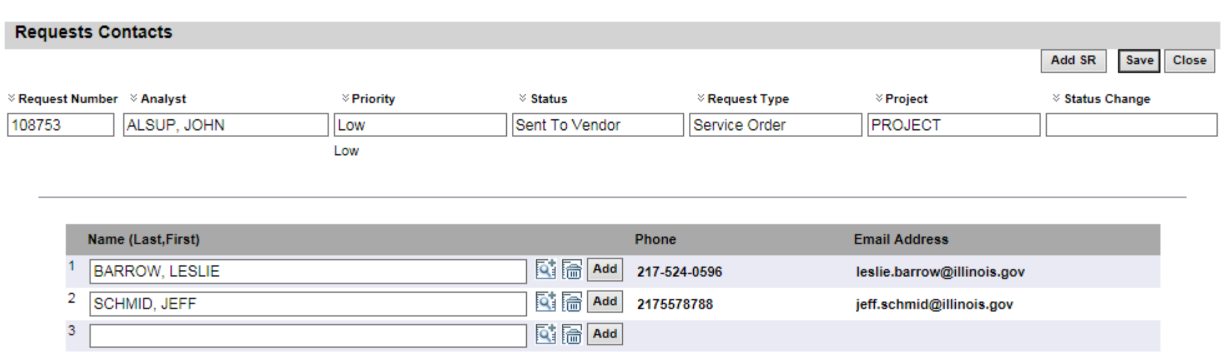
Name (Last, First) - Enables you enter the first and last names of the contact persons from the personnel records.

Note: Use the Add icon next to the Name (Last, First) field if you want to add a new contact directly.

***Phone** - Displays the contact number of the selected person.

***Email Address** - Displays the e-mail address of the selected person

Note: (*) Only displays if phone and email address is assigned in the Personnel Table



Requests Contacts

Add SR Save Close

Request Number	Analyst	Priority	Status	Request Type	Project	Status Change
108753	ALSUP, JOHN	Low	Sent To Vendor	Service Order	PROJECT	

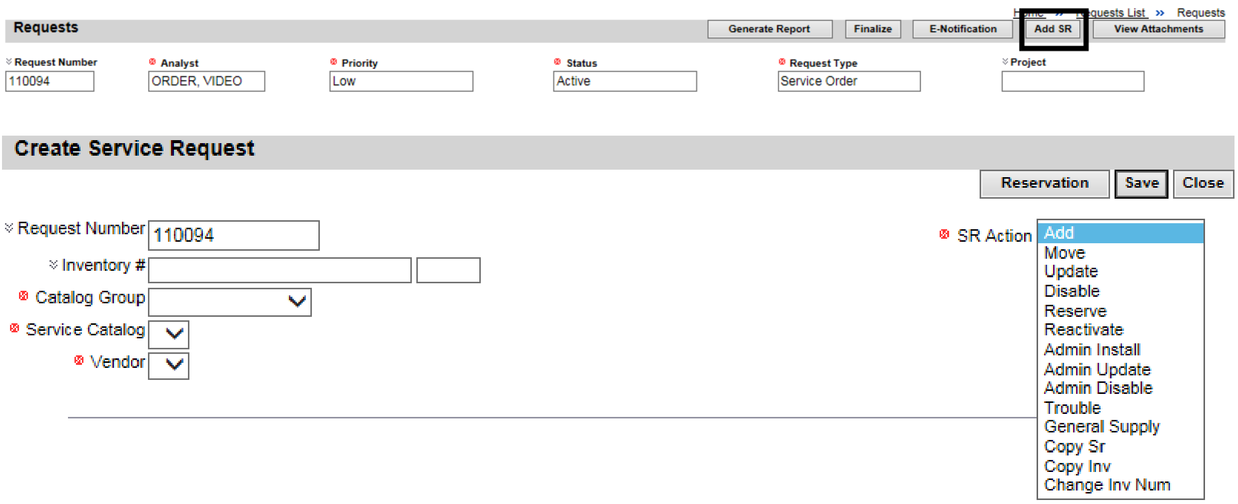
Low

	Name (Last,First)		Phone	Email Address
1	BARROW, LESLIE	Add	217-524-0596	leslie.barrow@illinois.gov
2	SCHMID, JEFF	Add	2175578788	jeff.schmid@illinois.gov
3		Add		

<u>Create Service Request (SR)</u> - The SR list page is the home page to manage and process service request in EMS. The SR List page displays the service requests associated with various requests. You build SR's based off of the work request from the Telecom Forms submitted by the Agency Telecom Coordinators. The work being done on assigned SR will only update inventory when the SR is finalized.

When all information has been entered in the Main Request sections you are ready to build your SR's

1. Click on Add SR button



In the Create Service Request list page, you can perform the following:

- **Add – This action is to be performed when installing a new service**
- **Move – This action is to be performed when moving active inventory to new location within same building or to new address**
- **Disable – This action is to be performed when the service is no longer needed**
- **Reactivate – This action is to be performed when disabled service needs to be placed back into an active status**
- **Admin Install - This action is to be performed when installing new service at no cost to the customer (Non-recurring charges only)**
- **Admin Update - This action is to be performed when changing information on active inventory records at no cost to the customer**
- **General Supply - This action is to be performed when building your TASKS SR and VEM records.**
  Note: This action will not update inventory. It is used for informational purposes only
- **Copy SR - This action will allow you to duplicate another SR and keep all information the same**

Note: Complete as many duplicate fields on Copied SR before performing this action

- **Change Inv Num This action is to be performed when inventory needs to be changed to different Inventory asset**

When ready to build your SR(s), please refer to the list of SR M&P's below. These M&P's will guide you through the process required for each type of work being performed

https://bccs.portal.illinois.gov/exec/centrep/cam/csctel/Pages/pm.aspx

Once the SR is built the SR can be assigned to one of the following status types throughout the Request process.

- **Active** – defaults to active when Request is first built
- **Sent To Vendor** – System changes when EON is sent
- **Voided** – manual change
- **On Hold** – manual change
- **Completed** – system changes when "**Completed Date**" and "**Verified By**" are populated in the **Service Requests – Customs section** and the **Save** button is activated or when the same fields (Completed Date and Verified By) are populated on the Main Request General Portion and the Save button is activated
- **Finalized –** system changes when "**Completed Date**" and "**Verified By**" are populated in the **Service Requests – Customs section** and the **Finalize** button is activated or when the same fields (Completed Date and Verified By) are populated on the Main Request General Portion and the Finalized button is activated

Electronic Order Notification

EMS enables you to send Electronic Order Notification (EON) e-mails to vendors. You can notify the vendors regarding the status of the service requests, analyst associated with the request, date on which the request was submitted, description of the service request, address, and so on.

Note: After the notification is sent, the status of the Request and SR(s) changes to Sent to Vendor.

Request Print page

- **General Information Only** – allows you to send only the Request General page
- **General Information and All SR's** – allows you to send both the Request General page and all SR's (default action)

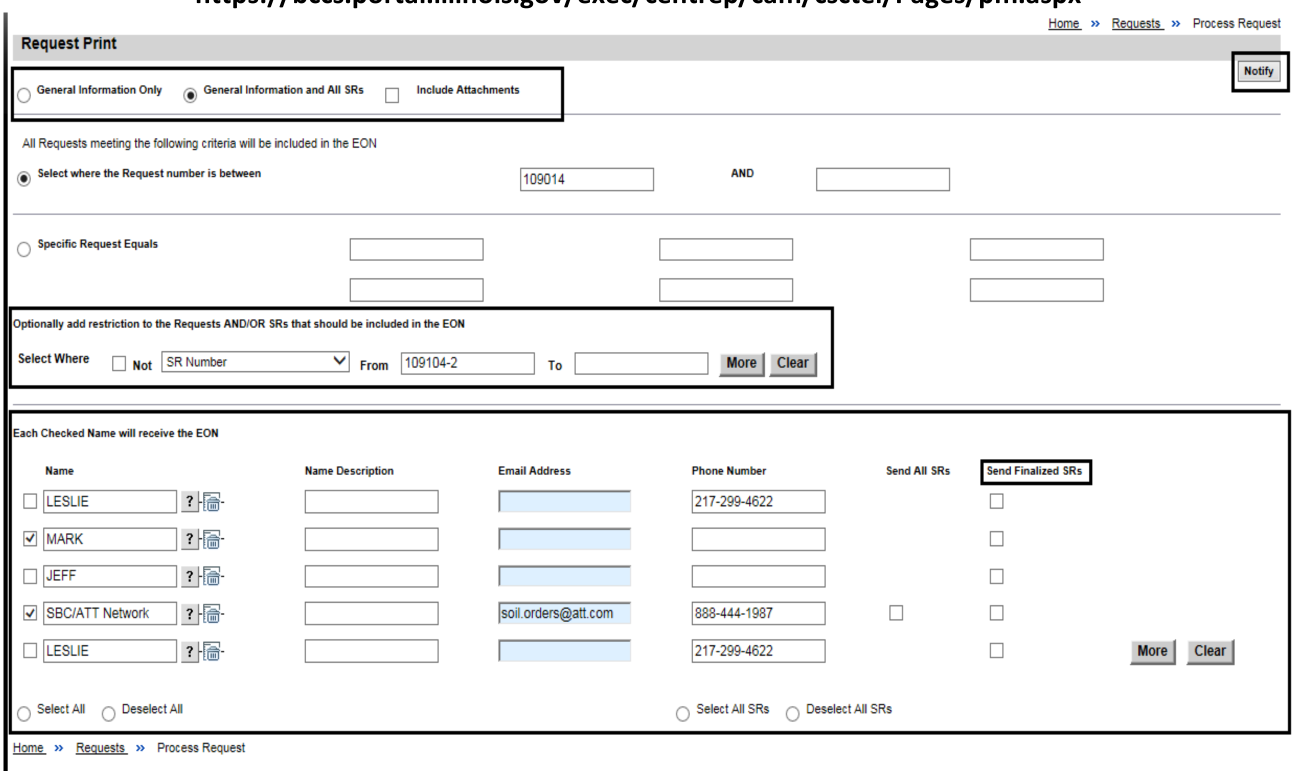
- **Include Attachments** – to be checked if there are assigned attachments that need to be provided
- **"Optionally add restriction to the Requests AND/OR SRs that should be included in the EON"** section – this allows you to designate with SR(s) will be sent to the recipient
- "**Each Checked Name will receive the EON**" section allows you to identify or add additional recipients that will receive the Request/SR(s)

  The following recipients will be identified at receiving Request/SR(s)
  - o **Requestor** – located on the Main Request general portion (will be checked by default)
  - o **Assigned Contacts** - located in the Contact section of the Main Request (those assigned to the Contacts section of the main request section)
  - o **Vendor** - located on the assigned SR(s) associated to the Main Request (will be checked by default)
  - o **User Name**- located in General section of assigned SR(s)
- **Send Finalized SR's**

  Will need to be checked if wanting the recipient to receive finalized SR(s)
- **Notify** button - Receive message "**Notification sent to vendor successfully**"

  Note: If there is no recipient checked then you will receive an error message.

https://bccs.portal.illinois.gov/exec/centrep/cam/csctel/Pages/pm.aspx



Finalize Request

The finalization process closes the request and updates the inventory in the EMS database. At the time of finalizing the request, the request can be in any state except 'Voided' state.

Conditions to finalize a request

The application finalizes the request only when the following conditions are met:

- The Vendors assigned to the TASKS SR have been assigned a completed date
- All pertinent information has been added to assigned SR(s).
- The Completed Date, Verified By and Verified On fields of the Request are updated.
- All vendor confirmation(s) have been received

To finalize a request, do the following:

Step 1 **Requests > Request***

Step 2 Select the Request for which you want to Finalize from Request List page.

Step 3 On the Main Request page, click on the **Edit** ( ) hyperlink in the **General** section

- The **General section** window appears

Step 4 Populate the **Completed Date** with the date work was completed and **Verified By** with analysts initials

Note: the Verified On field will systematically populate with the date the request and SR(s) was finalized

Step 5 Click the **Finalize** button - The application finalizes the request and assigned SR(s) if all the conditions are met.

Note: If one or more of these conditions is not met then you will receive an error message informing you of the error.

Error Found

The following error(s) have been detected:

- Error - Error in SR 115503-1, One or more Tasks has not been completed.

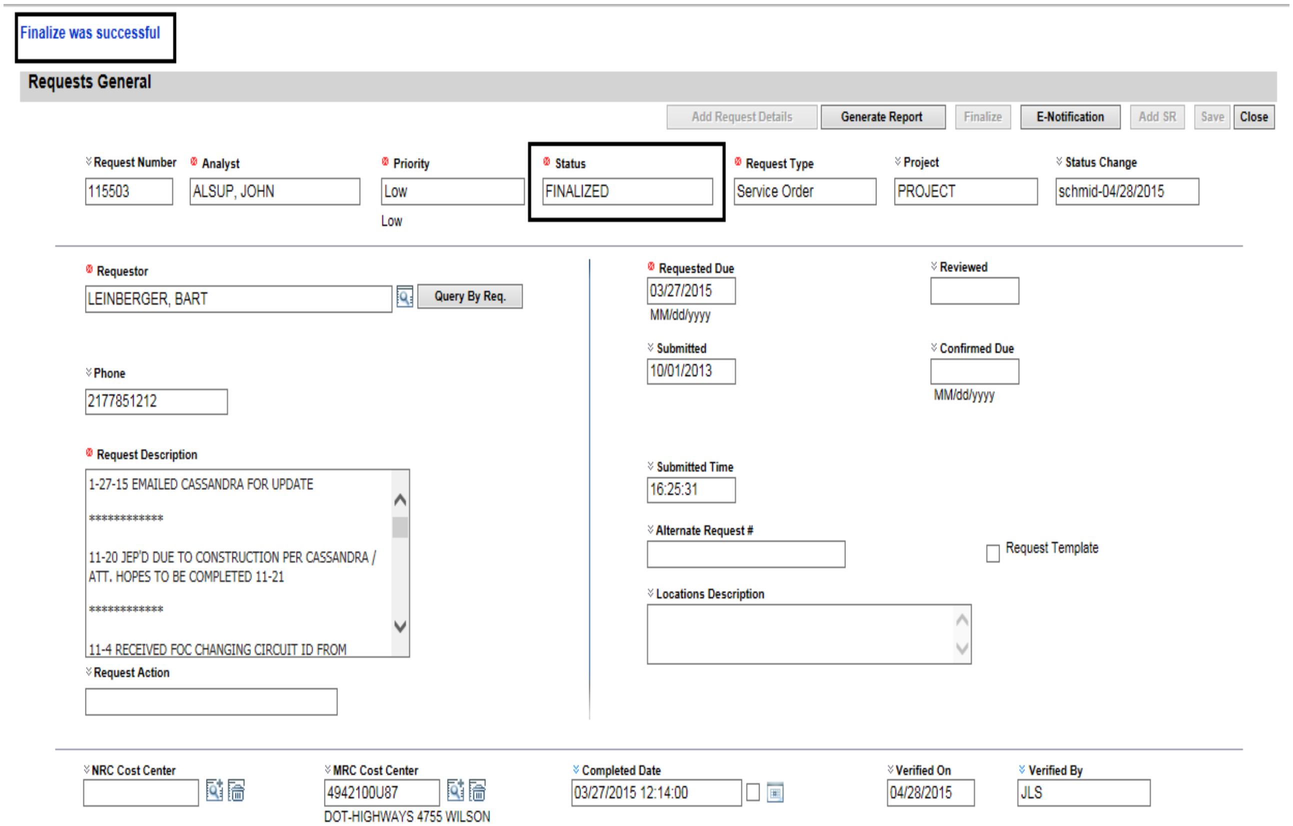
Requests General

Before you can correct the error(s) you will want to do the following process

- Remove the date in the **Completed Date** field
- Remove your initials in the **Verified By**
- Click the Save button.
  This will put the main Request back to an active status. Correct the Error(s)
- Repeat Step 3 thru Step 5

If all conditions have been met or you corrected the error(s) and repeated Steps 3-5 the Request will be assigned to a Finalize status.

Note: when Request and SR(s) are finalized no changes can be made. You can still produce reports and activate the EON process.

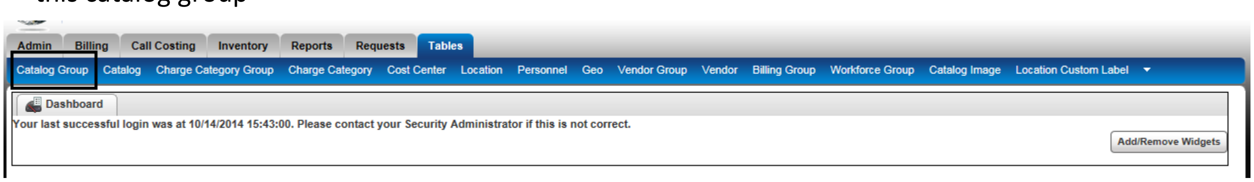


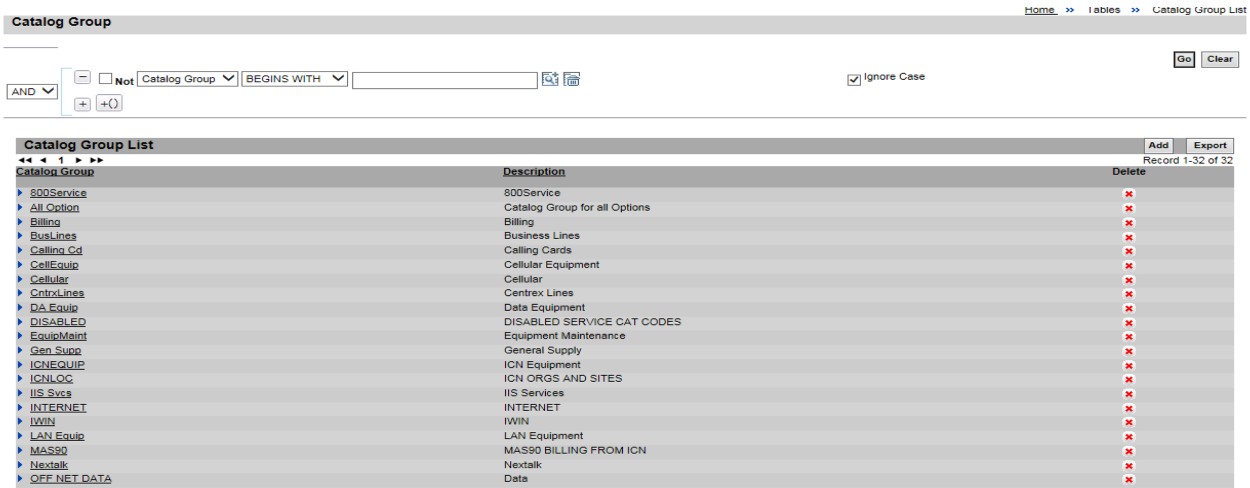
Managing Tables

The **Tables** module provides you with user-defined information that is used throughout EMS. These tables also enable the administrator to customize the lists and maintain support files. Through these tables, you can define cost centers, key personnel, locations, vendors, and catalogs.

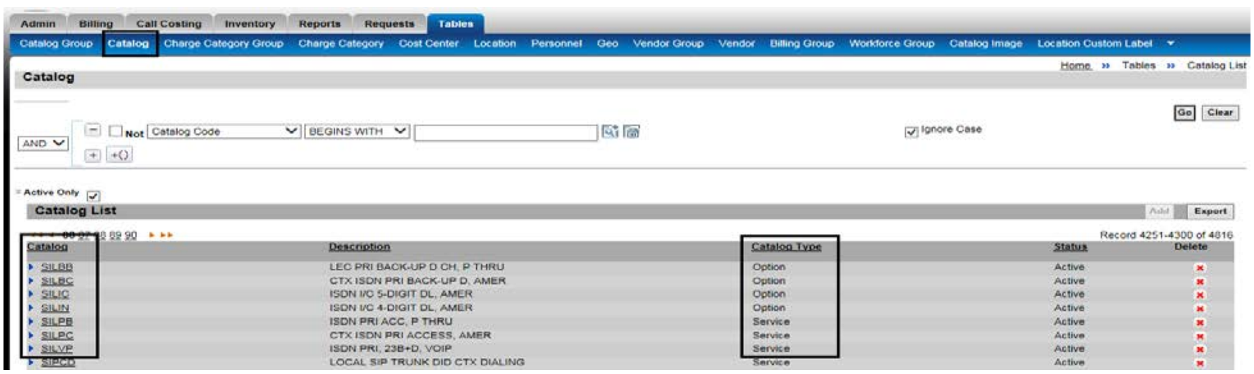
The **Tables** module contains all master files and records required by the application. This section includes the following topics:

Catalog Group – Catalog groups are used to group similar catalogs that have been defined through the Catalog menu item. It allows you to search on all assets that have a service catalog that is assigned to this catalog group

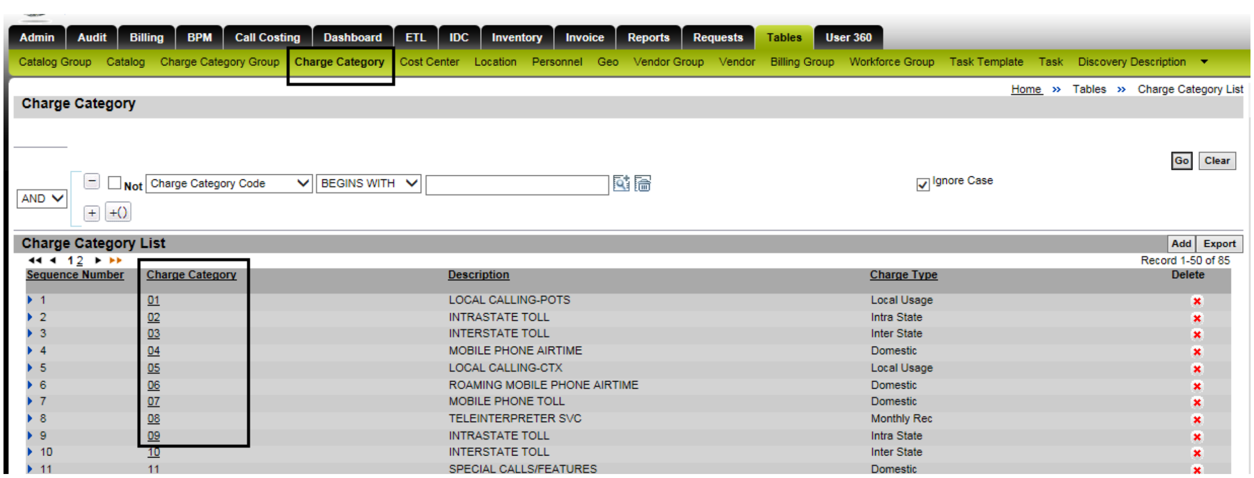




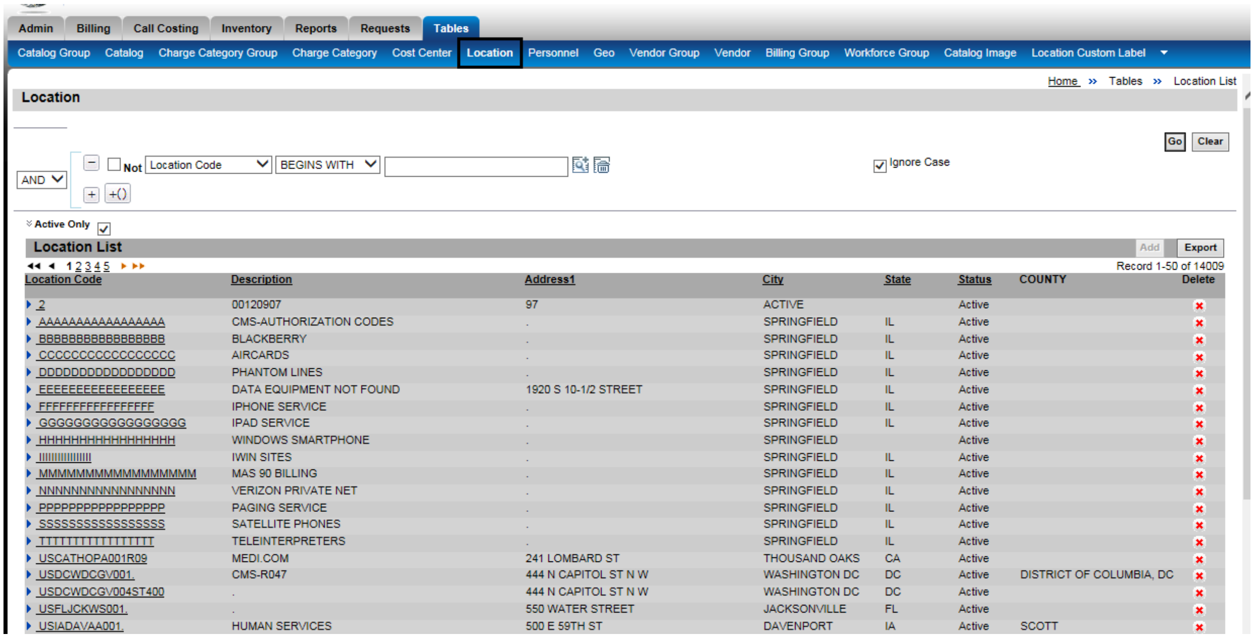
Catalog - Catalogs identify and categorize services, items and options (features and accessories) items. For example, a service catalog identifies types of services. All assets are assigned to a service catalog code and may also have and option(s) assigned to them.



Charge Category - Charge categories are used to identify the different types of charges that appear on invoices.

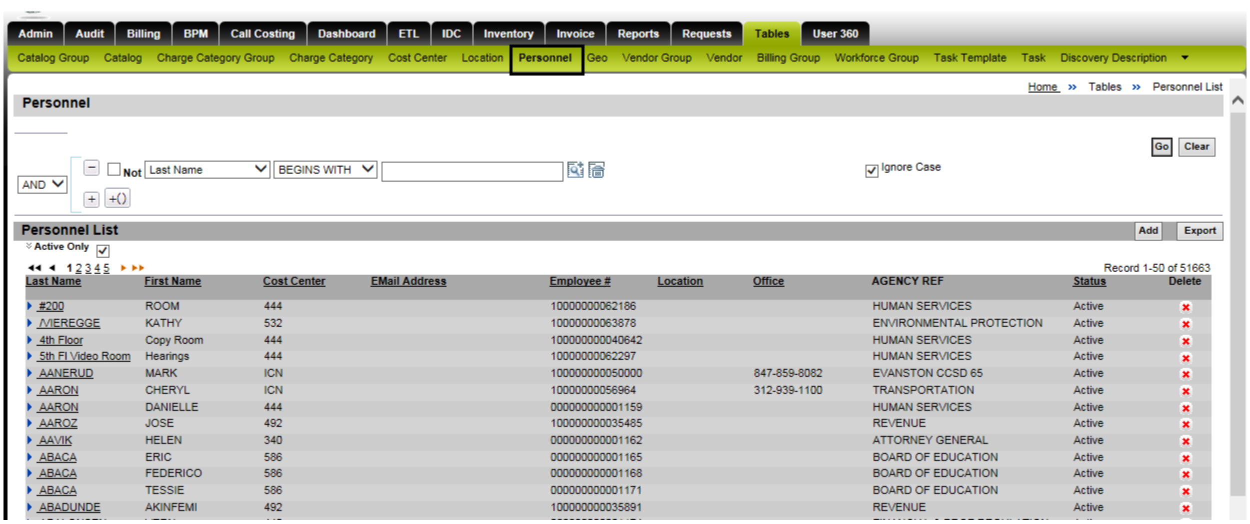


Location - The **Location** menu item allows you to enter location details for an inventory item. All assets are assigned with a Primary Location code and/or Secondary Location code. The Location code has to exist in the Location database to be assigned to a Primary or Secondary location code



Location Code	Description	Address1	City	State	Status	COUNTY	Delete
2	00120907	97	ACTIVE		Active		
AAAAAAAAAAAAAAAAA	CMS-AUTHORIZATION CODES	.	SPRINGFIELD	IL	Active		
BBBBBBBBBBBBBBBBB	BLACKBERRY	.	SPRINGFIELD	IL	Active		
CCCCCCCCCCCCCCCCC	AIRCARDS	.	SPRINGFIELD	IL	Active		
DDDDDDDDDDDDDDDDD	PHANTOM LINES	.	SPRINGFIELD	IL	Active		
EEEEEEEEEEEEEEEEE	DATA EQUIPMENT NOT FOUND	1920 S 10-1/2 STREET	SPRINGFIELD	IL	Active		
FFFFFFFFFFFFFFFFF	IPHONE SERVICE	.	SPRINGFIELD	IL	Active		
GGGGGGGGGGGGGGGGG	IPAD SERVICE	.	SPRINGFIELD	IL	Active		
HHHHHHHHHHHHHHHHH	WINDOWS SMARTPHONE	.	SPRINGFIELD		Active		
IIIIIIIIIIIIIIIII	IWIN SITES	.	SPRINGFIELD	IL	Active		
MMMMMMMMMMMMMMMMM	MAS 90 BILLING	.	SPRINGFIELD	IL	Active		
NNNNNNNNNNNNNNNNN	VERIZON PRIVATE NET	.	SPRINGFIELD	IL	Active		
PPPPPPPPPPPPPPPPP	PAGING SERVICE	.	SPRINGFIELD	IL	Active		
SSSSSSSSSSSSSSSSS	SATELLITE PHONES	.	SPRINGFIELD	IL	Active		
TTTTTTTTTTTTTTTTT	TELEINTERPRETERS	.	SPRINGFIELD	IL	Active		
USCATHOPA001R09	MEDI.COM	241 LOMBARD ST	THOUSAND OAKS	CA	Active		
USDCWDCGV001.	CMS-R047	444 N CAPITOL ST N W	WASHINGTON DC	DC	Active	DISTRICT OF COLUMBIA, DC	
USDCWDCGV004ST400	.	444 N CAPITOL ST N W	WASHINGTON DC	DC	Active		
USFLJCKWS001.	.	550 WATER STREET	JACKSONVILLE	FL	Active		
USIADAVAA001.	HUMAN SERVICES	500 E 59TH ST	DAVENPORT	IA	Active	SCOTT	

Personnel - The **Personnel** menu item allows you to enter details relevant to an employee or personnel. It is from the Personnel database that one assigns the User Name to an inventory asset



Last Name	First Name	Cost Center	EMail Address	Employee #	Location	Office	AGENCY REF	Status	Delete
#200	ROOM	444		1000000062186			HUMAN SERVICES	Active	
/VIEREGGE	KATHY	532		1000000063878			ENVIRONMENTAL PROTECTION	Active	
4th Floor	Copy Room	444		10000000040642			HUMAN SERVICES	Active	
5th Fl Video Room	Hearings	444		1000000062297			HUMAN SERVICES	Active	
AANERUD	MARK	ICN		10000000050000		847-859-8082	EVANSTON CCSD 65	Active	
AARON	CHERYL	ICN		1000000056964		312-939-1100	TRANSPORTATION	Active	
AARON	DANIELLE	444		00000000001159			HUMAN SERVICES	Active	
AAROZ	JOSE	492		10000000035485			REVENUE	Active	
AAVIK	HELEN	340		00000000001162			ATTORNEY GENERAL	Active	
ABACA	ERIC	586		00000000001165			BOARD OF EDUCATION	Active	
ABACA	FEDERICO	586		00000000001168			BOARD OF EDUCATION	Active	
ABACA	TESSIE	586		00000000001171			BOARD OF EDUCATION	Active	
ABADUNDE	AKINFEMI	492		10000000035891			REVENUE	Active	