OTS Self Service Portal
Service Request User Guide

"Network/Telecom Project Request (OTS-16)"

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Prepared by:

Emily Shirley

Office of Technology Services

Division of Administration

State of Louisiana

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DOCUMENT HISTORY

Version	Date	Additions/Changes	Prepared/Reviewed By
1.0	07/18/2023	Initial submission.	Emily Shirley
1.1	07/15/2024	Updating document contents, adding screenshots, formatting.	Emily Shirley
1.1	08/13/2024	Updating links, formatting.	Emily Shirley
1.1	08/14/2024	Adding fields and field definitions.	Emily Shirley
1.1	08/16/2024	Updated Table of Contents and formatted table heading	D'Wanna Collins
1.2	10/03/2024	Editing field descriptions and screenshots to reflect form changes.	Emily Shirley
1.3	10/16/2024	Removing TC Approval group field definitions. Updated screenshot.	Emily Shirley
1.3	11/12/2024	Adjusting definitions to reflect changes.	Emily Shirley

GENERAL INFORMATION

The OTS Self Service Portal contains the Network/Telecom Project Request (OTS-16). The Network/Telecom Project Request (OTS-16) form is located under the Communication Services > Network Services category within the Service Catalog. This request is used to request a project or quote from the Network Services / Telecommunications team.

Descriptions of each field on the form as well as information regarding the visibility and requirement properties of each field are provided in this guide.

AUDIENCE

This guide is intended for Service Desk Analysts and Self Service Users who have a business need to submit a Network/Telecom Project Request (OTS-16) request.

PURPOSE

The purpose of this document is to provide a better understanding of the form and field values when submitting the Network/Telecom Project Request (OTS-16) request. Brief form screenshots and explanations are provided in this guide.

SCOPE

The Network/Telecom Project Request (OTS-16) form is designed to be used by Service Desk Analysts and Self Service Users to request a project from Network Services / Telecommunications. This guide is intended for those users who have a business need to submit this request in Ivanti.

RELATED DOCUMENTS

- Network_Telecom Project Request (OTS-16) - WF Diagram

ACCESSING THE OTS-16 REQUEST

1. Select the **Service Catalog** tab at the top of the page.

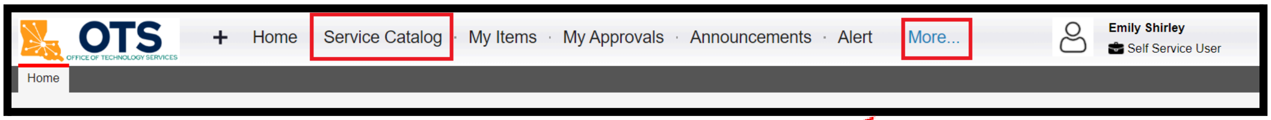

Figure 1. The Top Toolbar in Ivanti.

NOTE: If Service Catalog is not displayed, click **More**.

2. Locate the **Browse by Category** section on the left of the page within the Service Catalog.

3. Click **Communication Services > Network Services**.

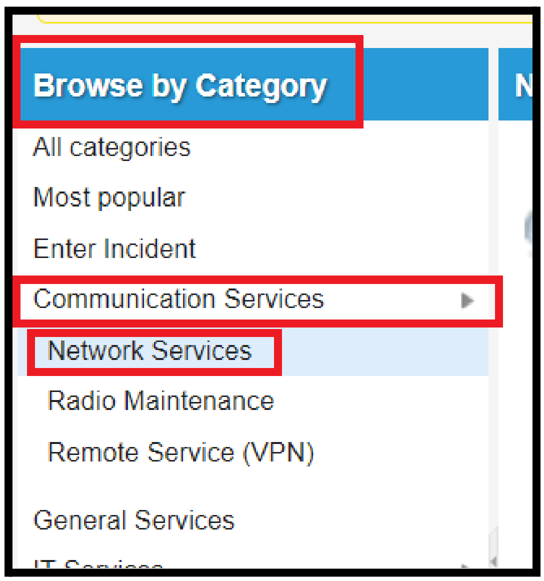

Figure 2. The category section within the Service Catalog.

4. Select the **Network/Telecom Project Request (OTS-16)** form.

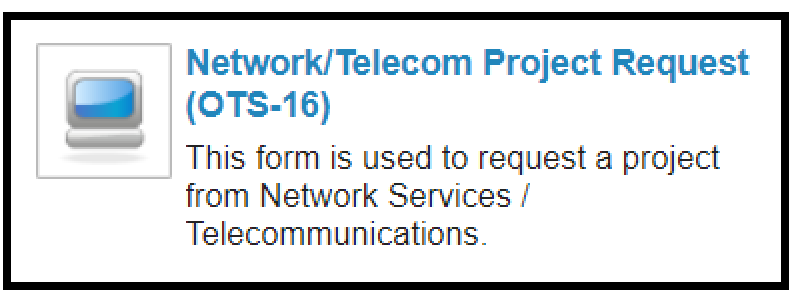

Figure 3. The Network/Telecom Project Request (OTS-16) tile in the Service Catalog.

REQUEST INFO PAGE

This page's purpose is to provide import information to the submitter of the request before they begin filling out the form. This page states the following:

"Please review this request carefully.

After it has been approved by the agency telecommunications coordinator (TC), this request will be locked and no modifications will be possible.

If you learn changes are needed after TC approval, please cancel this request and submit a new one."

Figure 4 below shows an example of the "Request Info" page.

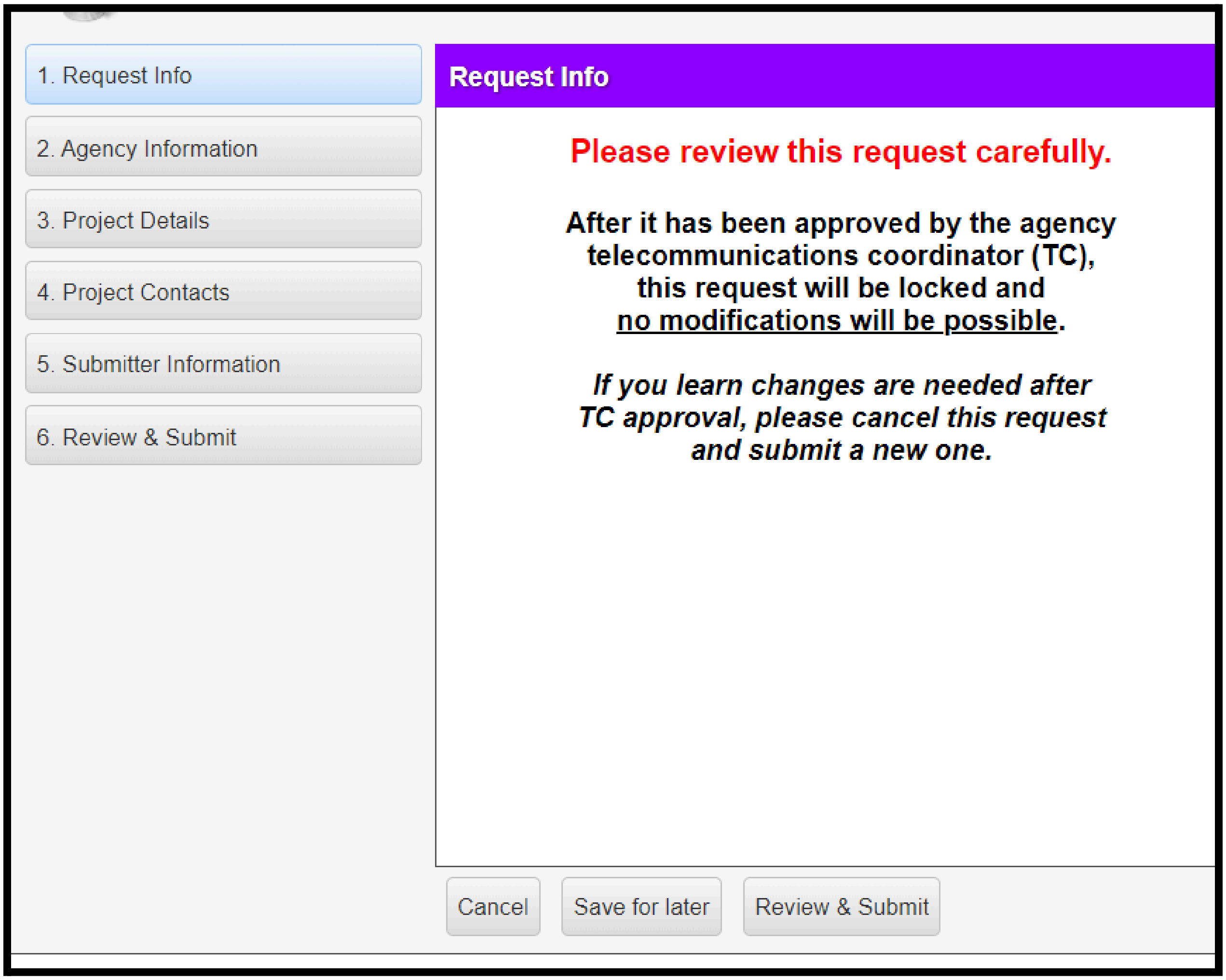

Figure 4. The Request Info page.

AGENCY INFORMATION PAGE

Figure 5 below shows an example of the "Agency Information" page.

Table 1 (page 8) gives definitions for each field on the "Agency Information" page as well as requirement and visibility properties.

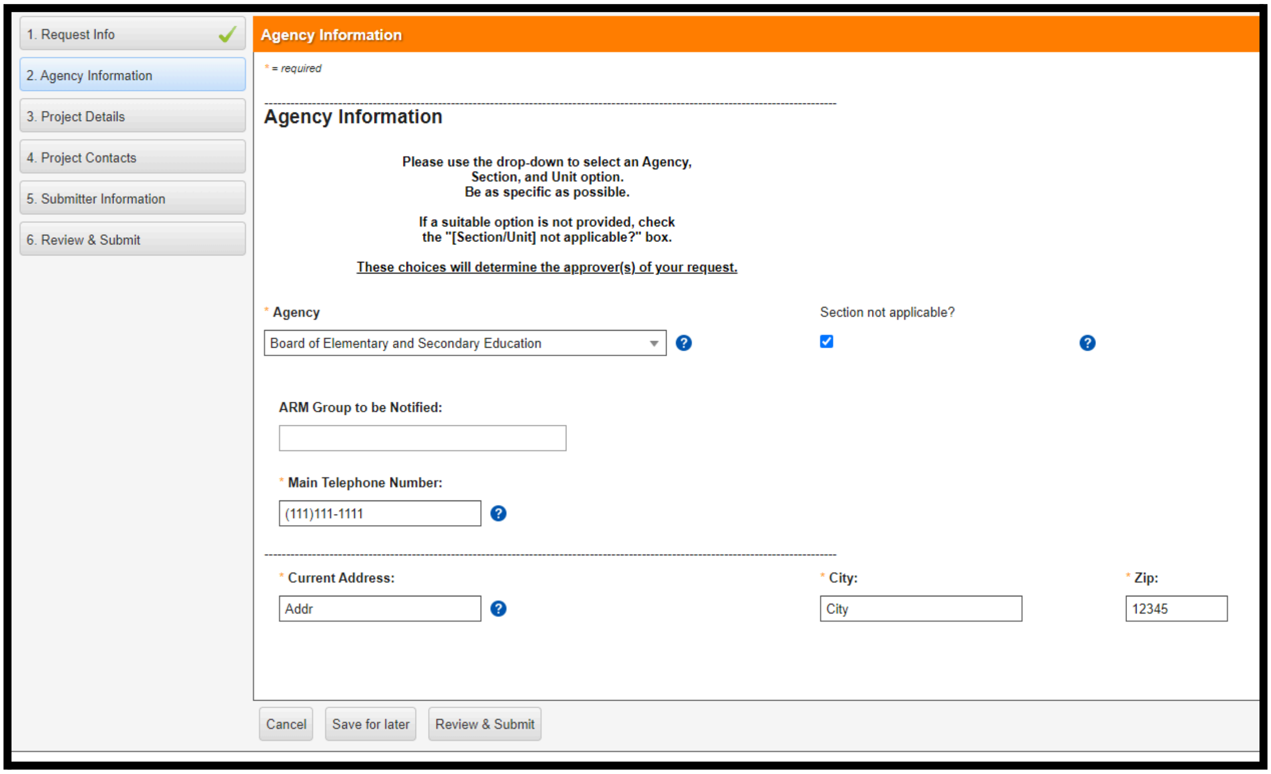

Figure 5. The Agency Information page.

FIELD DEFINITIONS - AGENCY INFORMATION PAGE

- All fields with an asterisk (*) are required.
- Fields marked with an exclamation point (!) are only visible after certain form selections during request submission.

Table 1. Agency Information page field definitions.

Field Name	Definition
* Agency	Select the requesting agency from the drop-down.
! Section not applicable?	! This field is visible if the selected Agency doesn't require a Section selection. Check this checkbox if the requesting Agency has no associated Section. *This checkbox can only be checked if no value exists within the **Section** field.
* ! Section	* ! This field is visible and required if the **Section not applicable?** field is unchecked. Select the requesting section from the drop-down.
! Unit not applicable?	! This field is visible if the selected Section doesn't require a Unit selection. Check this checkbox if the requesting Section has no associated Unit. *This checkbox can only be checked if no value exists within the **Unit** field.
* ! Unit	* ! This field is visible and required if the **Unit not applicable?** field is unchecked. Select the requesting unit from the drop-down.
ARM Group to be Notified	This field is automatically populated with the ARM group associated with the selected Agency/Section/Unit. *This field is only able to be edited by users within the OTS-EUC-VoiceOrders or OTS-DCO-LANET-NetworkSupport team.
* Main Telephone Number	Enter the best telephone number for the analysts to call if further information is needed regarding the request.

Table 1. Agency Information page field definitions.

Field Name	Definition
* Current Address	Enter the current address of the project. *If this is a relocation request, fields to identify the new location are located on another page in the form.
* City	Enter the current city of the project. *If this is a relocation request, fields to identify the new location are located on another page in the form.
* Zip	Enter the current zip code of the project. *If this is a relocation request, fields to identify the new location are located on another page in the form.

PROJECT DETAILS PAGE

Figures 6, 7, 8, and 9 below show an example of the "Project Details" page.

Table 2 (page 14) gives definitions for each field on the "Project Details" page as well as requirement and visibility properties.

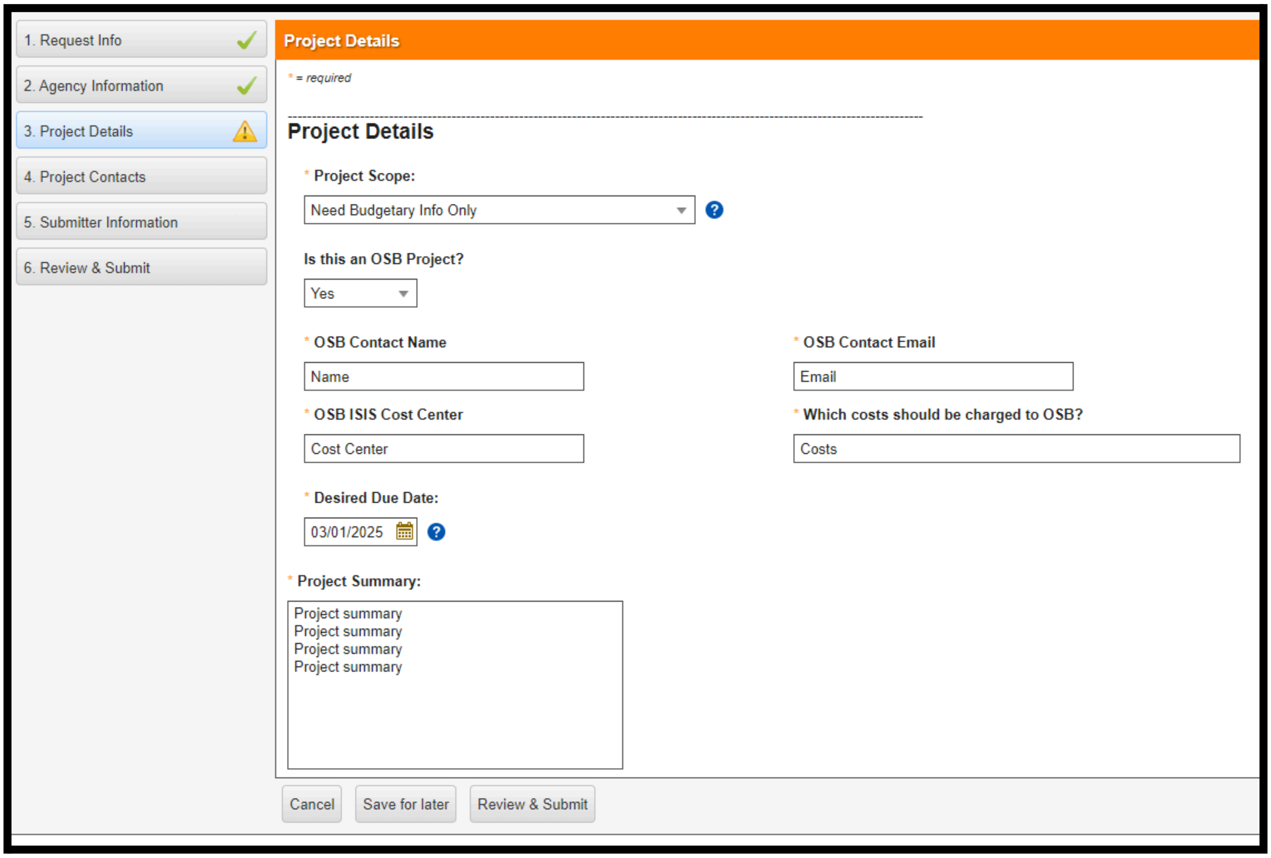

Figure 6. The beginning of the Project Details page.

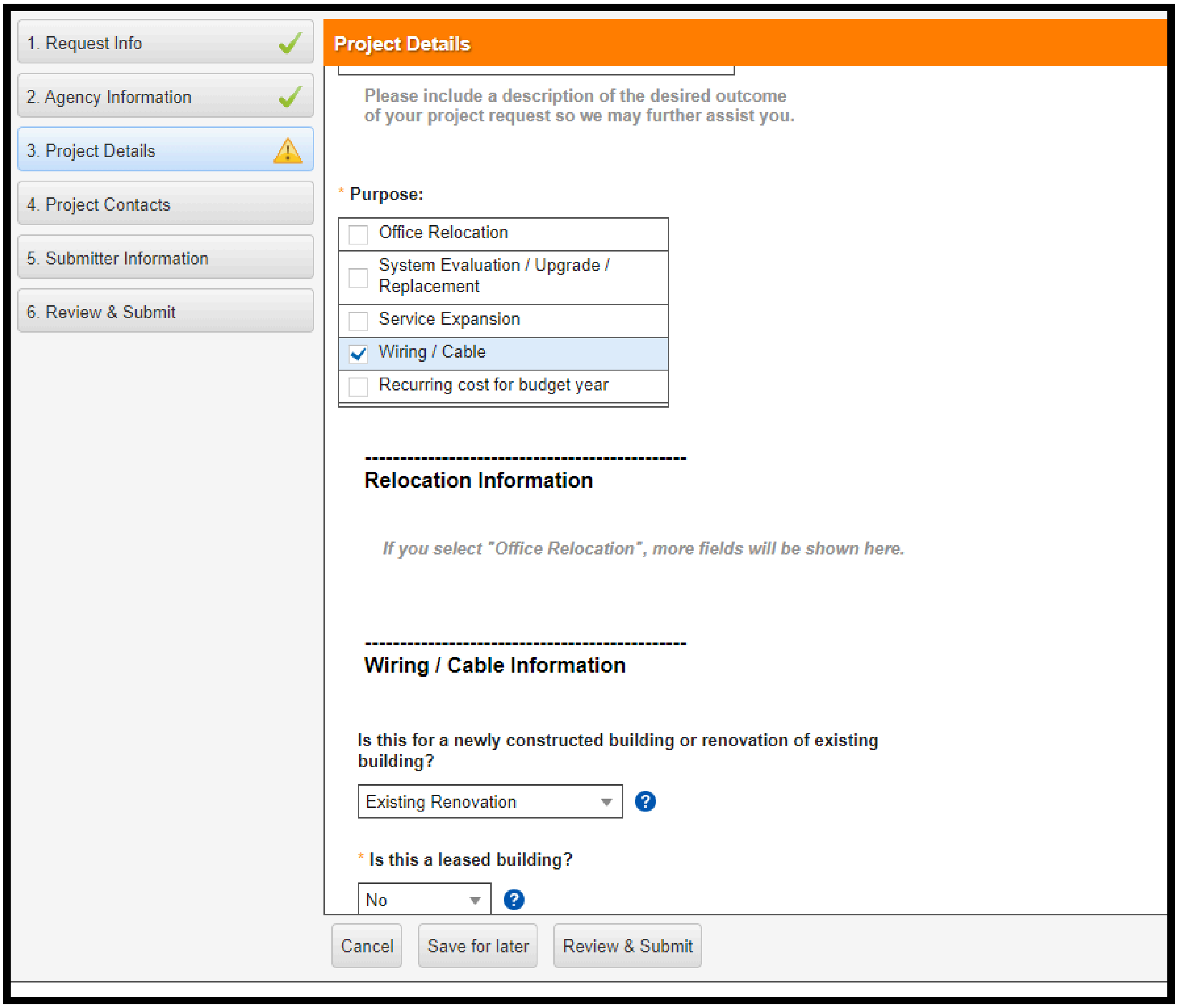

Figure 7. The top-middle of the Project Details page.

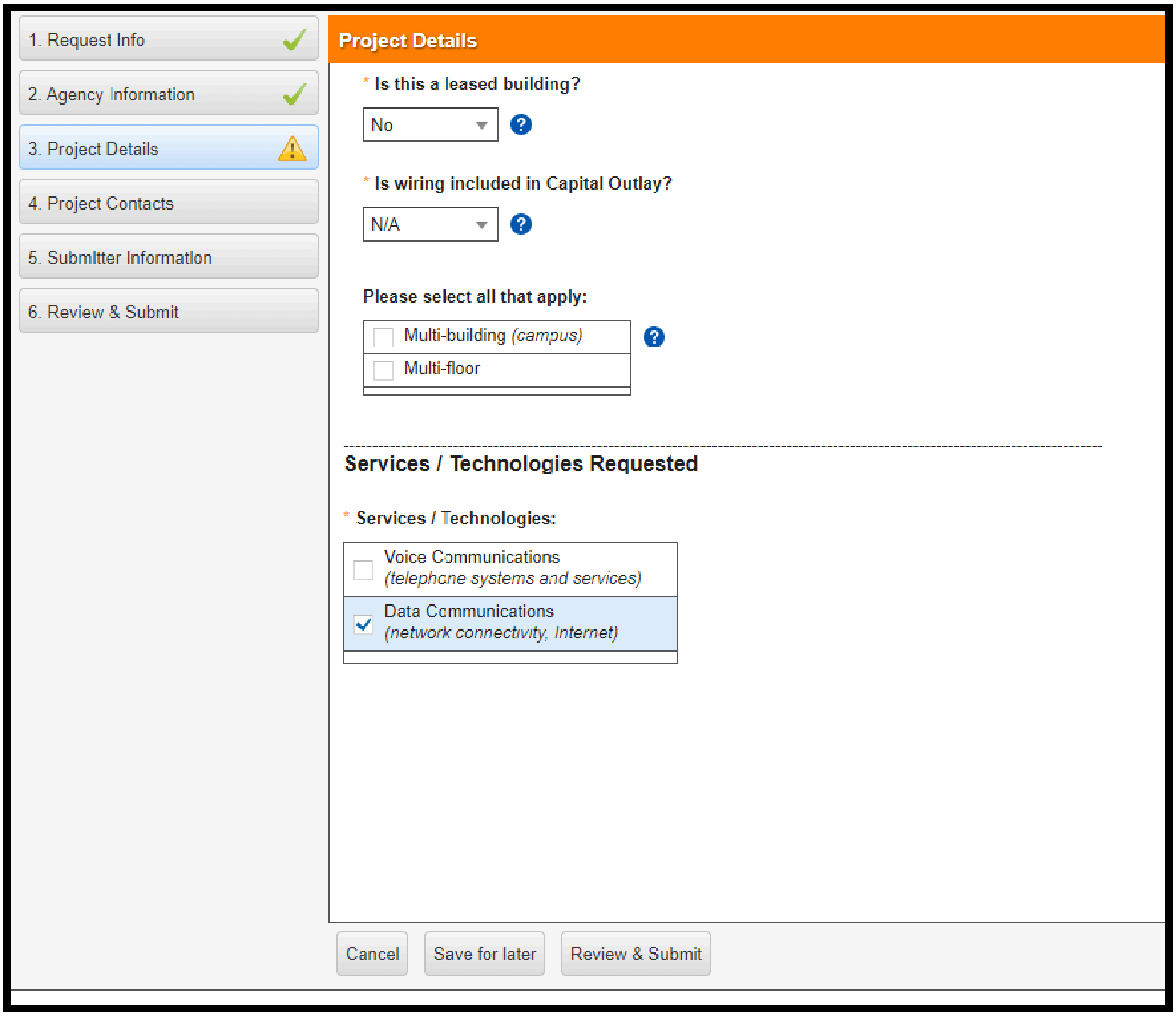

Figure 8. The bottom-middle of the Project Details page.

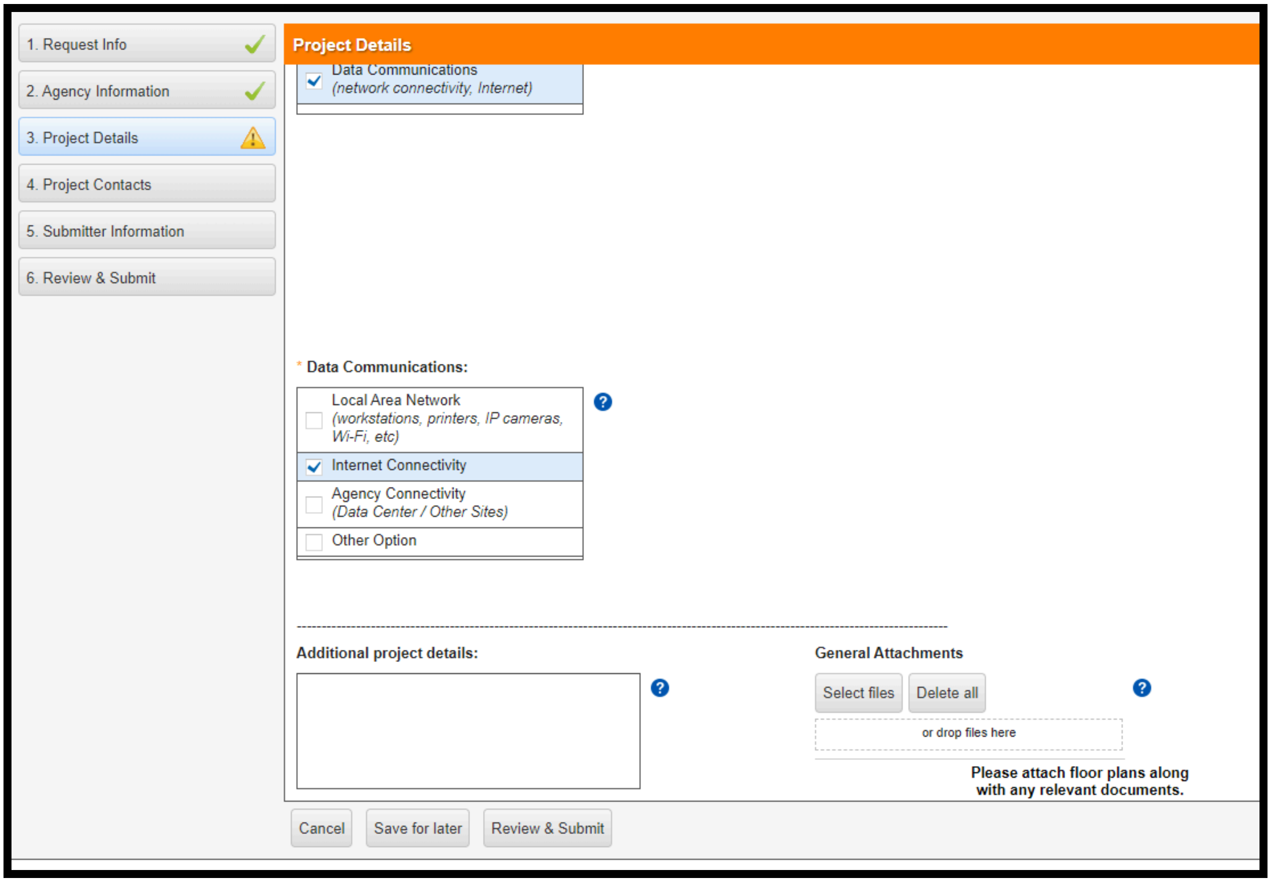

Figure 9. The end of the Project Details page.

FIELD DEFINITIONS - PROJECT DETAILS PAGE

- All fields with an asterisk (*) are required.
- Fields marked with an exclamation point (!) are only visible after certain form selections during request submission.

Table 2. Project Details page field definitions.

Field Name	Definition
* Project Scope:	Select whether only budget information is needed or if the project being requested is ready for implementation. This drop-down contains the following options: • Need Budgetary Info Only • Ready to Implement (after quote approval)
Is this an OSB Project?	Select "Yes" if this project is an OSB project. This is a Yes/No drop-down.
* ! OSB Contact Name	* ! This field is visible and required if "Yes" is selected for the **Is this an OSB Project?** field. Enter the OSB contact's name.
* ! OSB Contact Email	* ! This field is visible and required if "Yes" is selected for the **Is this an OSB Project?** field. Enter the OSB contact's email
* ! OSB ISIS Cost Center	* ! This field is visible and required if "Yes" is selected for the **Is this an OSB Project?** field. Enter the OSB ISIS cost center.
* ! Which costs should be charged to OSB?	* ! This field is visible and required if "Yes" is selected for the **Is this an OSB Project?** field. Enter the costs to be charged to OSB.
* Desired Due Date:	Select the desired due date of the project request.
* Project Summary:	Enter a summary of the project request to help the analysts understand your project.

OTS

Table 2. Project Details page field definitions.

Field Name	Definition
* Purpose:	Select one or more options to clarify the purpose of the project request. This drop-down contains the following options: • Office Relocation • System Evaluation / Upgrade / Replacement • Service Expansion • Wiring / Cable • Recurring cost for budget year
* ! Please specify budget year:	* ! This field is visible and required if "Recurring cost for budget year" is selected for the **Purpose** field. Specify the budget year in which the recurring cost is referring to.
* ! New Address:	* ! This field is visible and required if "Office Relocation" is selected for the **Purpose** field. Enter the new address the office is relocating to.
* ! New City:	* ! This field is visible and required if "Office Relocation" is selected for the **Purpose** field. Enter the new city the office is relocating to.
* ! New Zip:	* ! This field is visible and required if "Office Relocation" is selected for the **Purpose** field. Enter the new zip code the office is relocating to.
* ! Anticipated Occupancy Date:	* ! This field is visible and required if "Office Relocation" is selected for the **Purpose** field. Select the estimated occupancy date on which the office relocation will be completed.

Table 2. Project Details page field definitions.

Field Name	Definition
! Is this for a newly constructed building or renovation of existing building?	! This field is visible if "Wiring / Cable" is selected for the **Purpose** field. Select an option to specify whether the building is newly built / under construction or this project is due to the renovation of an existing building. This drop-down contains the following options: ● Existing Renovation ● Newly Constructed
* ! Is this a leased building?	* ! This field is visible and required if "Wiring / Cable" is selected for the **Purpose** field. Select "Yes" if the building in which the requested project is to be performed is a leased building. Otherwise, select "No". This is a Yes/No drop-down.
* ! Is wiring included in Capital Outlay?	* ! This field is visible and required if "No" is selected for the **Is this a leased building?** field. Select "Yes" if wiring is included in the Capital Outlay. Select "No" if wiring is not included in the Capital Outlay. Otherwise, select "N/A". This drop-down contains the following options: ● Yes ● No ● N/A
* ! Is wiring included in the lease specifications (RL2)?	* ! This field is visible and required if "Yes" is selected for the **Is this a leased building?** field. Select "Yes" if wiring is included in the lease specifications. Otherwise, select "No". This is a Yes/No drop-down.

Table 2. Project Details page field definitions.

Field Name	Definition
! Please attach a copy of the telecommunications section of the lease agreement.	* ! This field is visible if "Yes" is selected for the **Is wiring included in the lease specifications (RL2)?** field. Use this field to upload the telecommunications section of the lease agreement.
! Please select all that apply:	! This field is visible if "Wiring / Cable" is selected for the **Purpose** field. Select zero, one, or both options to specify the building's structure. This list contains the following options: ● Multi-building (campus) ● Multi-floor
* Services / Technologies:	Select one or both options to specify the services requested. This list contains the following options: ● Voice Communications *(telephone systems and services)* ● Data Communications (*network connectivity, Internet*)
* ! Voice Communications:	* ! This field is visible and required if "Voice Communications" is selected for the **Services / Technologies** field. Select one or many Voice options from the list that are being requested within this project. This list contains the following options: ● Key System ● PBX System ● Hosted Voice Service (HVS) ● Centrex ● Overhead Paging ● PRI ● SIP ● ACD/Contact Center ● Other Option

Table 2. Project Details page field definitions.

Field Name	Definition
* ! Please specify voice request:	* ! This field is visible and required if "Other Option" is selected within the **Voice Communications** field. Enter the Voice service that is being requested.
! Key System Details -	! These fields are visible if "Key System" is selected within the **Voice Communications** field.
! Existing Key System:	Enter the Key System currently in use prior to this project.
! Number of Key System end users:	Enter the current number of end users utilizing the existing Key System.
! Existing Voice Service:	Select the existing Voice service prior to this project. This drop-down contains the following options: • Analog • Business Lines • ISDN • PRI • SIP
! Existing Number of End Users:	Enter the current number of end users utilizing the existing Voice Service.

Table 2. Project Details page field definitions.

Field Name	Definition
! PBX System Details -	! These fields are visible if "PBX System" is selected within the **Voice Communications** field.
! Existing PBX System:	Enter the PBX System currently in use prior to this project.
! Number of PBX end users:	Enter the current number of end users utilizing the existing PBX System.
! Existing Voice Service:	Select the existing Voice service prior to this project. This drop-down contains the following options: • Analog • Business Lines • ISDN • PRI • SIP
! Existing Number of End Users:	Enter the current number of end users utilizing the existing Voice Service.

Table 2. Project Details page field definitions.

Field Name	Definition
! Hosted Voice Service (HVS) Details -	**!** The below fields are visible if "Hosted Voice Service (HVS)" is selected within the **Voice Communications** field.
! Is the agency currently using OTS HVS service at this or other locations?	Select "Yes" if the requesting agency is using OTS HVS at the location specified within the request or other locations. Otherwise, select "No".
! Number of existing end users:	Enter the current number of end users utilizing the existing OTS HVS.
! Existing Service:	**!** This field is visible if "No" is selected for the **Is the agency currently using OTS HVS service at this or other locations?** field. Select the existing Voice service prior to this project. This drop-down contains the following options: • Analog • Business Lines • ISDN • PRI • SIP
! Existing Number of End Users:	**!** This field is visible if "No" is selected for the **Is the agency currently using OTS HVS service at this or other locations?** field. Enter the current number of end users utilizing the existing Voice Service.
! Centrex Details -	**!** These fields are visible if "Centrex" is selected within the **Voice Communications** field.
! Number of Centrex end users:	Enter the current number of end users utilizing the existing Centrex System.
! Paging System Details -	**!** These fields are visible if "Overhead Paging" is selected within the **Voice Communications** field.
! Existing Paging System:	Enter the Paging System currently in use prior to this project.

Table 2. Project Details page field definitions.

Field Name	Definition
! PRI Existing System Details -	! These fields are visible if “PRI” is selected within the **Voice Communications** field.
! Existing Service:	Enter the PRI System currently in use prior to this project.
! Existing Number of End Users:	Enter the current number of end users utilizing the existing PRI System.
! SIP Existing System Details -	! These fields are visible if “SIP” is selected within the **Voice Communications** field.
! Existing Service:	Enter the SIP System currently in use prior to this project.
! Existing Number of End Users:	Enter the current number of end users utilizing the existing SIP System.
* ! Data Communications:	* ! This field is visible and required if “Data Communications” is selected for the **Services / Technologies** field. Select one or many Data options from the list that are being requested within this project. This list contains the following options: ● Local Area Network (workstations, printers, IP cameras, Wi-Fi, etc) ● Internet Connectivity ● Agency Connectivity (Data Center / Other Sites) ● Other Option
* ! Please specify data request:	* ! This field is visible and required if “Other Option” is selected for the **Data Communications** field. Enter the Data service that is being requested.
! How many wired connections are needed?	! This field is visible if “Local Area Network” is selected for the **Data Communications** field. Enter the number of wired connections being requested.

Table 2. Project Details page field definitions.

Field Name	Definition
Additional project details:	Enter any additional and relevant details regarding this project request.
General Attachments	Upload any additional and relevant files regarding this project request.

PROJECT CONTACTS PAGE

Figure 10 below shows an example of the "Project Contacts" page.

Table 3 (page 24) gives definitions for each field on the "Project Contacts" page as well as requirement and visibility properties.

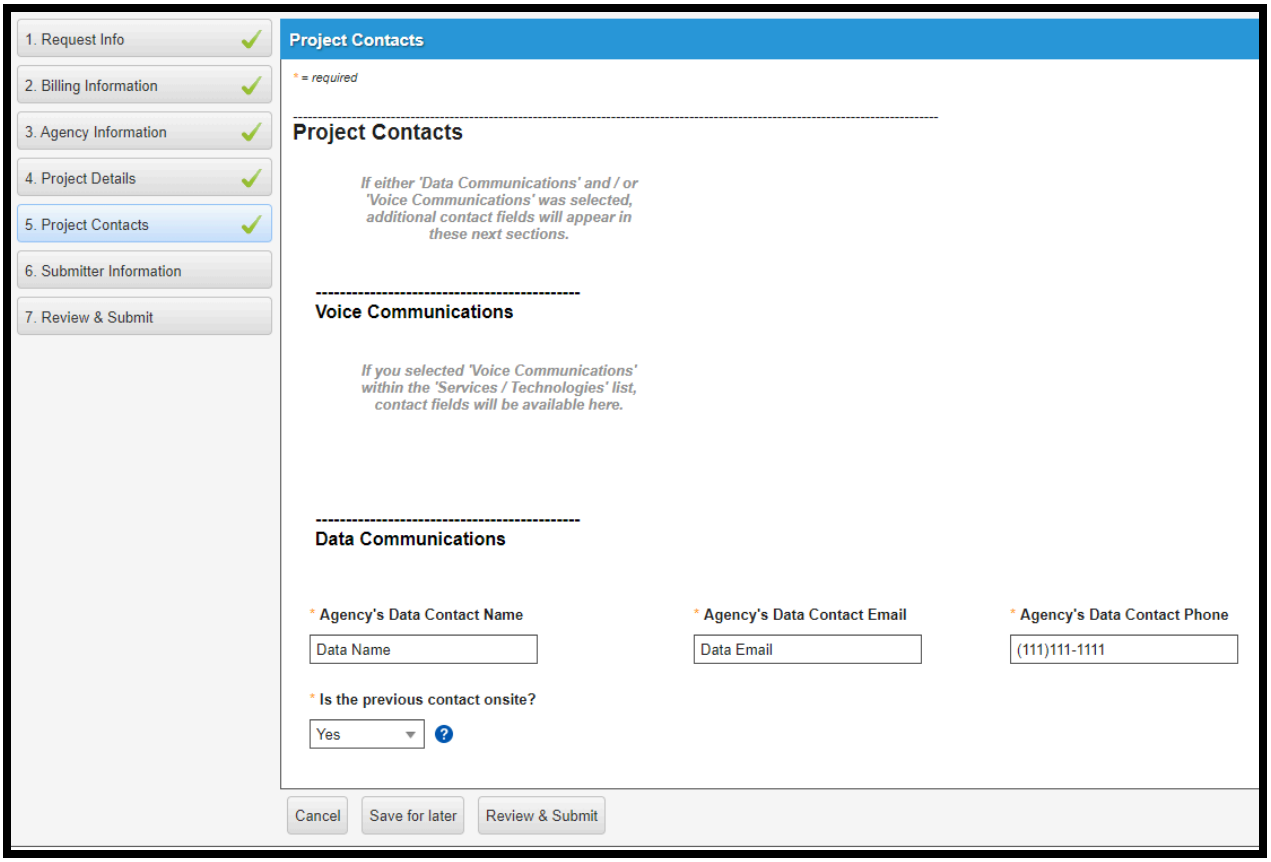

Figure 10. The Project Contacts page.

FIELD DEFINITIONS - PROJECT CONTACTS PAGE

- All fields with an asterisk (*) are required.
- Fields marked with an exclamation point (!) are only visible after certain form selections during request submission.

Table 3. Project Contacts page field definitions.

Field Name	Definition
* ! Agency's Voice Contact Name	* ! This field is visible and required if "Voice Communications" is selected for the **Services / Technologies** field. Enter the first and last name of the requesting agency's contact for the voice project request.
* ! Agency's Voice Contact Email	* ! This field is visible and required if "Voice Communications" is selected for the **Services / Technologies** field. Enter the email of the requesting agency's contact for the voice project request.
* ! Agency's Voice Contact Phone	* ! This field is visible and required if "Voice Communications" is selected for the **Services / Technologies** field. Enter the phone number of the requesting agency's contact for the voice project request.
* ! Is the previous contact onsite?	* ! This field is visible and required if "Voice Communications" is selected for the **Services / Technologies** field. Select "Yes" if the above voice contact is located on the project site. Otherwise, select "No".
* ! Onsite Voice Contact Name	* ! This field is visible and required if "No" is selected for the above **Is the previous contact onsite?** Field. Enter the first and last name of the on-site project contact for the voice project request.
* ! Onsite Voice Contact Email	* ! This field is visible and required if "No" is selected for the above **Is the previous contact onsite?** Field. Enter the email of the on-site project contact for the voice project request.

Table 3. Project Contacts page field definitions.

Field Name	Definition
* ! Onsite Voice Contact Phone	* ! This field is visible and required if "No" is selected for the above **Is the previous contact onsite?** Field. Enter the phone number of the on-site project contact for the voice project request.
* ! Agency's Data Contact Name	* ! This field is visible and required if "Data Communications" is selected for the **Services / Technologies** field. Enter the first and last name of the requesting agency's contact for the data project request.
* ! Agency's Data Contact Email	* ! This field is visible and required if "Data Communications" is selected for the **Services / Technologies** field. Enter the email of the requesting agency's contact for the data project request.
* ! Agency's Data Contact Phone	* ! This field is visible and required if "Data Communications" is selected for the **Services / Technologies** field. Enter the phone number of the requesting agency's contact for the data project request.
* ! Is the previous contact onsite?	* ! This field is visible and required if "Data Communications" is selected for the **Services / Technologies** field. Select "Yes" if the above data contact is located on the project site. Otherwise, select "No".
* ! Onsite Data Contact Name	* ! This field is visible and required if "No" is selected for the above **Is the previous contact onsite?** Field. Enter the first and last name of the on-site project contact for the data project request.

Table 3. Project Contacts page field definitions.

Field Name	Definition
* ! Onsite Data Contact Email	* ! This field is visible and required if "No" is selected for the above **Is the previous contact onsite?** Field. Enter the email of the on-site project contact for the voice project request.
* ! Onsite Data Contact Phone	* ! This field is visible and required if "No" is selected for the above **Is the previous contact onsite?** Field. Enter the phone number of the on-site project contact for the voice project request.

SUBMITTER INFORMATION PAGE

Figure 11 below shows an example of the "Submitter Information" page.

Table 4 (page 28) gives definitions for each field on the "Submitter Information" page as well as requirement and visibility properties.

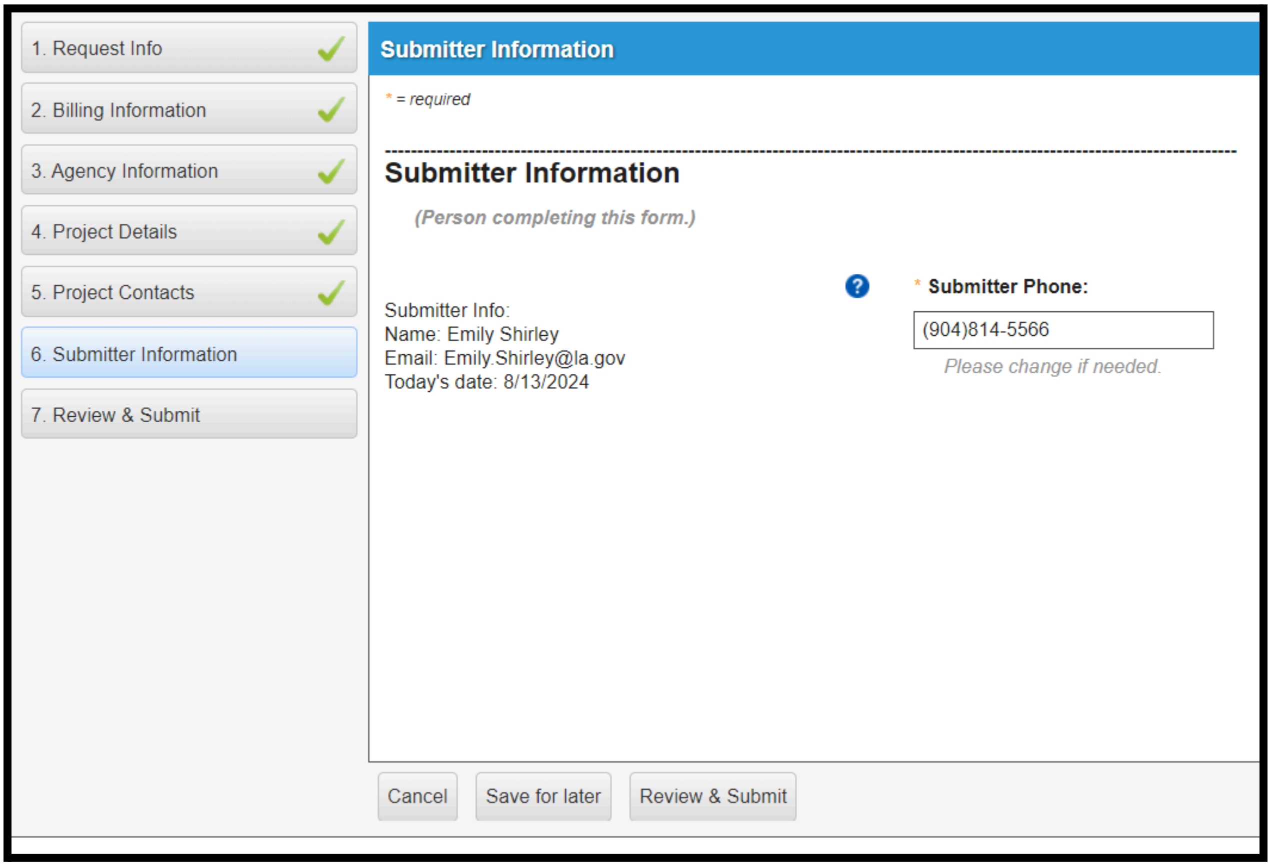

Figure 11. The Submitter Information page.

FIELD DEFINITIONS - SUBMITTER INFORMATION PAGE

- All fields with an asterisk (*) are required.
- Fields marked with an exclamation point (!) are only visible after certain form selections during request submission.

Table 4. Submitter Information page field definitions.

Field Name	Definition
Submitter Info:	This is a read-only field. This field automatically populates with the current user's name and email as well as the current date.
* Submitter Phone:	This field automatically populates with the current user's phone number, if stored within Ivanti. This field may be edited if needed.

GLOSSARY

Drop-down (form field) – This is a type of field found on Service Request forms. A single selection can be made from a predefined list.

Field Requirement Properties – Some Ivanti Service Requests have fields that are or are not required depending on previous field selections or values.

Field Visibility Properties - Some Ivanti Service Requests have fields that are or are not shown on the request form depending on previous field selections or values.

Home Page – The first page seen when logging into Ivanti. This page can also be accessed through the toolbar. It contains dashboards with various information based on your role or team in Ivanti.

List (form field) – This is a type of field found on Service Request forms. Multiple selections can be made from a predefined list.

Role – Each user in Ivanti can have one or more roles. The user's role that is chosen determines various access permissions of that user within the system.

Self Service User (role) / SSU – A role in Ivanti that determines various access permissions of the user within the system. SSU's are usually the ones who submit a request or approve a request.

Service Catalog – The workspace used to submit Service Requests in Ivanti.

Service Desk Analyst (role) / SDA - A role in Ivanti that determines various access permissions of the user within the system. SDA's are usually the ones who work on a request's resolution.

Top Toolbar – The top row of buttons in Ivanti. The button availability varies between roles.

Workflow - The back-end processing of an Ivanti Service Request. Responsible for automation such as emails, Approvals, and Task creation.

Workspace – Workspaces provide detailed, formatted pages in Ivanti that can be dedicated to one type of item (Task, Service Request, etc).