

**State of Ohio: Next Generation Telephony Service (NGTS)**  
**Technical Assessment Workbook – Phone Profile Tab Instructions**

This document is intended to provide an explanation and guidance to the person responsible for completing the CBTS Technical Assessment Workbook Phone Profile spreadsheet. After reading these instructions, if you still need assistance to complete the spreadsheet, **contact CBTS or ACG** at (614)562-0716.

Column	Column Name	Column Description / Completion Instructions
The information that you will enter in Columns A through AM, describes the current state of the Agency's telephony system:		
A	Last name	Enter the user's last name. If the phone is located in a conference room, hoteling station (shared desk/cubicle), break room/kitchen, lobby, etc., enter "n/a."
B	First name	Enter the user's first name. If the phone is located in a conference room, hoteling station (shared desk/cubicle), break room/kitchen, lobby, etc., enter "n/a."
C	Employee / Contractor / Other	All staff should be entered as "Employee." "Other" should be used to designate conference rooms, hoteling stations (shared desks/cubicles), break rooms/kitchens, lobby phones, etc. "Contractor" is not likely to be used.
D	Email Address	Enter the user's email address. This will be in your agency's standard format, e.g.: <a href="mailto:firstname.lastname@agency.ohio.gov">firstname.lastname@agency.ohio.gov</a>  If the phone is located in an "other" area (conference room, shared desk/cubicle, break room/kitchen, lobby, etc.), enter "n/a."
E	Cost Center	<b><i>(Optional based on agency's need)</i></b>  Employees and other locations with a phone are assigned to Cost Centers. Enter the Cost Center to be charged. If you do not know the cost center to which an employee or other location with a phone has been assigned, check with your section's finance manager or section chief's admin.
F	OAKS ID	<b><i>(Optional based on agency's need)</i></b>  Enter the agency's OAKS ID
G	Agency	Enter for every employee and other location, the agency's name abbreviation; the abbreviation should match existing entries in the TSR system.
H	Section/Department/ Division	Enter the user's business unit /functional group, e.g. Charitable Law, Communications, Employment Law, Taxation, etc.
I	Desk/Office Location/ Floor	Enter the floor on which the user's or other location's phone is located. Examples: Floor 1, Floor 23
J	Address Line 1	Enter the physical street address where the user's or other location's phone is located. Use the format: street number, pre-street direction, if any, street name, street suffix, and post –street direction, if any. Example: 150 E Gay St

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K	Address Line 2	If the physical address where the user's or other location's phone is located has a secondary address indicator (e.g. Floor, Suite, Unit, Room, Department, etc.), enter it here. Examples: Floor 23, Suite 1340, Unit 18
L	City/Town	Enter the name of the city or town for the physical address where the user's or other location's phone is located (e.g. Columbus, London, Richfield, etc.).
M	Zip Code	Enter the 5-digit zip code for the physical address where the user's or other location's phone is located, e.g. 43215, 43140, 44286, etc.
N	eRate Eligible	<b>- Select from dropdown -</b> If your agency is eRate eligible, select 'Yes' from the dropdown list. If you are not sure, check with your finance section
O	if eRate is Yes please provide your Funding Request Number (FRN)	Enter the eRate Funding Request Number (FRN)
P	Existing Ten Digit DID*/Telephone Number (*Direct Inward Dialing)	Enter the user's or other location's complete 10-digit phone number, starting with the area code. Use the format 555-555-5555. <b>Notes: Do not include Secondary or Phantom line numbers as they will no longer be used after transition.</b>  <b>Do not leave blank, if requesting a new number (not converting an existing one) enter 'New'.</b>
Q	Billing Telephone Number	This is the master station number, and must match / correspond to all Centrex numbers being requested for porting to NGTS. If Master Station # does not match, then a separate TSR request must be submitted to have AT&T change the numbers as appropriate.
R	Class of Service	<b>- Select from dropdown -</b> Select the appropriate Class of Service setting for each phone number being converted. COS0 = 911 dialing only (e.g. lobby phone) COS1 = On system dialing + COS0 (e.g. break rooms) COS2 = Local dialing + COS1 (e.g. lobby, break room) COS3 = Long distance dialing + COS2 (e.g. typical for most) COS4 = Intl dialing + COS3 (e.g for those allowed to call intl.) COS5 = Phone with no dialing restrictions or controls
S	Current Device Type	<b>- Select from dropdown -</b> Indicate whether the user's current phone or the location's current phone or other device is a physical phone (desk phone), conference phone, fax machine, or modem.

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T	Cordless Phone? Yes/No	- <b>Select from dropdown</b> -  Indicate whether the user's current phone or the location's current phone is cordless. If the phone is cordless, enter "Yes"; otherwise, enter "No."
U	Wall Mount Used? Yes/No	- <b>Select from dropdown</b> -  Indicate whether the user's or other location's current phone, fax machine or modem is plugged into a wall mounted phone jack. If the device is plugged into a wall mounted phone jack, enter "Yes"; otherwise, enter "No."
V	Existing Location/ Jack/Number	For phones designated as "Other" in Column C, enter a description of the phone's location by entering "conference room", "hoteling station" (shared desk/cubicle), "break room/kitchen", "lobby", etc.
W	Centrex Line? Yes / No	- <b>Select from dropdown</b> -  Indicate whether the user's or other location's current phone is a Centrex service phone (i.e. not an Avaya phone). If the user's or other location's phone is a Centrex, enter "Yes"; otherwise, enter "No."
X	Outbound Caller ID Blocking Used?	- <b>Select from dropdown</b> -  Indicate whether the user's or other location's current phone uses outbound caller ID blocking. If the user's or other location's phone uses outbound caller ID blocking, enter "Yes"; otherwise, enter "No."
Y	Do any Services Require Authorization Codes? If So, List Requirements	If users are required to obtain Authorization Codes prior to utilizing service(s) offered via a phone, fax machine or modem, briefly explain the billing accommodations that need to be arranged. <b>This is generally used for authorizing long distance calls. Calling language / translation line does NOT require this.</b>
Z	List Intercom Group Member Numbers Used?	If the user's or other location's phone has been included in an intercom group, enter the number used. Example: 5-5555
AA	Add-on Module For Additional Buttons Needed?	- <b>Select from dropdown</b> -  Add-on modules (i.e. sidecar, build-out, etc.) generally exist at front desk phones or with admin assistant phones, these enable the ability to see the status of many lines at once.  Enter "Yes" for all administrative employees who need to see the status of other persons' lines. Enter "No" for every other employee and location.
AB	List Lines Monitored Below (Busy Lamp Field)	Use this box to enter the line numbers that need to appear on the add-on module for status monitoring.

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AC	Multiple Appearance Directory Number? (MADN) Yes/No	- <b>Select from dropdown</b> - If another line appears on the user's phone, select "Yes"; otherwise, select "No."
AD	List All Other Secondary, Phantom, DID, Extension Numbers	Enter the secondary number here
AE	Voicemail Zero Out Option to be used? Yes / No	- <b>Select from dropdown</b> - Select 'yes' for all users who have zero-out option in their voicemail greeting.
AF	List the number you would like the Zero out option for	Enter the number to which the voice mail zero out should forward
AG	Call Monitoring or Recording Used? Yes/No	- <b>Select from dropdown</b> - If the user's or other location's phone has been set up for monitoring or recording the phone calls, enter "Yes"; otherwise, enter "No." This is likely to be 'no' for all users.
AH	Phone Model You Would Like to Order	Enter the phone model number for the type of phone the user will be getting (e.g. 6941, 8945, etc.)
AI	Number of Side Cars?(for models 8961, 9951, 9971)	If an add-on module was indicated in column AA, enter the number of modules this user will be getting
AJ	Hunt Group Lead Number(s)?	In a hunt group, the caller hears the busy tone only when all lines (not just the dialed number) are busy. Callers dial or are forwarded to the lead number. Enter the current hunt group lead number(s) for the user's or other location's phone. If none, enter "n/a."
AK	Member of Which Call Pick Up Group?	If the user's or other location's phone is currently a member of a call pick up group, enter the name or other designation that identifies the call pick up group.
AL	Located In Call Center or ACD/UCD Group? Yes/No	- <b>Select from dropdown</b> - If the user's or other location's phone is currently part of an ACD/UCD (automated call distribution) group (i.e. the user receives customer calls based on a next available agent methodology /call center), enter "Yes"; otherwise, enter "No."
AM	Computer Telephony Integration? Yes/No	- <b>Select from dropdown</b> - Select 'yes' or 'no' for all users. This is likely to be 'No' for most

The information that will be entered in Columns AO through AU, describes the future state of the AGO's telephony, after completion of the Telephony Migration Project:

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AO	Basic, Enhanced, Misc. or Analog Phone Profile	<p><b>- Select from dropdown -</b></p> <p>For most users, select '<b>Basic</b>' or '<b>Enhanced</b>' based on agency directive for user types.</p> <p>Select, <b>Misc Phone</b>, for hall/lobby/break room, emergency phones</p> <p>Select, <b>Analog Line</b>, for fax machine numbers</p> <p>Select, <b>Reserved Number</b>, for numbers that are being retained for future use, but not porting over to the service.</p>
AP	Desk Phone, Remote User (VPN), Automatic Call Distributor/Auto Attendant (ACD)?	<p><b>- Select from dropdown -</b></p> <p>For most users select '<b>Desk Phone</b>', Remote VPN users select '<b>VPN</b>', For users who login from multiple phones select '<b>Remote</b>' for members of a call center ACD select '<b>ACD</b>' for fax machines, select '<b>Analog</b>'</p>
AQ	Telephone Number To Be Ported? Yes/New	<p><b>- Select from dropdown -</b></p> <p>Select "<b>Yes</b>" for most employee and location. Selecting, yes, indicates that the existing phone number will be retained and transferred to the new service provider. Selecting '<b>New</b>' indicates a request for a new number (not porting over an existing number)</p>
AR	Video Capability Required on Phone Endpoint? Yes/No	<p><b>- Select from dropdown -</b></p> <p>Select "Yes" for every employee with 'Enhanced' profile in column AO</p>
AS	Remarks	<p>If the user is a Section Chief, enter "Section Chief." If the user's phone number is the general phone number assigned to the section, enter "Admin." Otherwise, enter "Employee."</p>
AT	Special Billing Requirements	<p>Enter any special billing requirements, like billing codes</p>
AU	Special Circumstances	<p>Enter any other special comments / requirements</p>