Procedure Title: Obtain an Exchange Fax Service (EFS) Account
Document Number: 110204-P-900
Revision: 1.0
Process Owner: Kay Buck
Date: June 1, 2008

Table of Contents

1.0 Scope ........................................................................................................................................2
2.0 Procedures ...................................................................................................................................2
3.0 Process Flow Diagram ...........................................................................................................6
4.0 Reference Documents ...........................................................................................................9

<table>
<thead>
<tr>
<th>Date Changed</th>
<th>Revisions</th>
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1.0 Scope

Key Words and Definitions

<table>
<thead>
<tr>
<th>Word / Acronym</th>
<th>Definition</th>
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<tbody>
<tr>
<td>GENIFAX</td>
<td>Vendor OMTOOL’s name for Fax Server &amp; Service</td>
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<tr>
<td>DID</td>
<td>Direct Inward Dial - the number assigned for receiving incoming faxes to a user’s email account</td>
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<tr>
<td>EMS</td>
<td>Expense Management System - the telephone chargeback system used by DTI for cost recovery</td>
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Exchange Fax Service (EFS) is an adjunct feature of Microsoft Outlook that allows users to send and receive faxes via their email account. This process document explains what EFS is and how a customer subscribes to the service.

EFS is available to State Agencies who use the Exchange Network. EFS for outbound faxing is automatically provisioned when Exchange email accounts are established, however, the ability to receive faxes requires provisioning by the customer agency and DTI.

EFS is integrated with Outlook email to enable a user to send and receive faxes within their email account rather than using a separate, stand-alone fax machine. EFS has the potential of replacing fax machines and bringing faxing to an individual’s email for improved document management including online reading, storage and archiving. It uses the same security, authentication and protection as the Outlook account.

The process to obtain a new EFS account is triggered when an organization’s Information Security Officer (ISO) completes and submits the DTI Service Center Request Management ticket.

2.0 Procedures

2.1 A New EFS account

2.1.1 State Employee requests an EFS account (via their agency’s internal process).

2.1.1.1 Requestor Agency approves requests

2.1.2 Agency Information Security Officer (ISO) completes a request ticket in DTI Service Center with the required information including the agency’s EMS Cost Center.

2.1.3 ISO submits the Service Center request ticket.

2.1.4 Service Center automatically notifies:
2.1.4.1 Requestor and ISO receive an email indicating the request ticket has been received in Service Center with the Request ticket number and description.

2.1.4.2 DTI Telecommunication Section (Telecom) that a Service Center request ticket is in their queue.

2.1.5 Telecom retrieves the request ticket.

2.1.6 Telecom processes the request ticket and creates the EFS account.

2.1.7 Telecom updates the request ticket and forwards it in Service Center.

2.1.8 Service Center generates an email notice to DTI Fiscal that a request ticket is in the Fiscal queue.

2.1.9 Fiscal retrieves the request ticket and updates the requesting agency’s Expense Management System (EMS) account.

2.1.10 Fiscal completes request and closes the Service Center request ticket.

2.1.11 Service Center generates a notification to the requestor that the EFS account has been created. The Service Center notification includes directions to a web address with instructions and activation information. (Information for Bulk EFS accounts is included with the Service Center ticket as an attachment.)
2.2 Modify an Existing EFS account

2.2.1 State Employee requests a modification to an EFS account (via their agency’s internal process).

2.2.1.1 Requestor Agency approves requests for modification.

2.2.2 Agency Information Security Officer (ISO) completes a request ticket in DTI Service Center with the required information including the agency’s EMS Cost Center.

2.2.3 ISO submits the Service Center request ticket.

2.2.4 Service Center automatically notifies:

2.2.4.1 Requestor and ISO receive an email indicating the request ticket has been received in Service Center with the Request ticket number and description.

2.2.4.2 DTI Telecommunication Section (Telecom) that a Service Center request ticket is in their queue.

2.2.5 Telecom retrieves the request ticket.

2.2.6 Telecom processes the request ticket and modifies the EFS account.

2.2.7 Telecom updates the request ticket and forwards it in Service Center.

2.2.8 Service Center generates an email notice to DTI Fiscal that a request ticket is in the Fiscal queue.

2.2.9 Fiscal retrieves the request ticket and updates the requesting agency’s Expense Management System (EMS) account.

2.2.10 Fiscal completes request and closes the Service Center request ticket.

2.2.11 Service Center generates a notification to the requestor (ISO) that the EFS account has been modified.
2.3 Delete EFS account

2.3.1 State Employee requests to delete an EFS account (via their agency’s internal process).

2.3.2 Agency Information Security Officer (ISO) completes a request ticket to delete the account in DTI Service Center with the required information including the agency’s EMS Cost Center.

2.3.3 ISO submits the Service Center request ticket.

2.3.4 Service Center automatically notifies:

2.3.4.1 Requestor and ISO receive an email indicating the request ticket has been received in Service Center with the Request ticket number and description.

2.3.4.2 DTI Telecommunication Section (Telecom) that a Service Center request ticket is in their queue.

2.3.5 Telecom retrieves the request ticket.

2.3.6 Telecom processes the request ticket and removes the EFS account.

2.3.7 Service Center automatically notifies:

2.3.7.1 Requestor and ISO receive an email indicating that the EFS account has been deleted.

2.3.7.2 DTI Fiscal to change EMS to reflect deletion of EFS account.

2.3.8 Fiscal retrieves the request ticket and updates the requesting agency’s Expense Management System (EMS) account.

2.3.9 Fiscal completes request and closes the Service Center request ticket.

2.3.10 Service Center generates a notification to the requestor (ISO) that the EFS account has been deleted and EMS has been updated.
3.0 Process Flow Diagram

3.1 Procedure to Obtain a NEW Exchange Fax Service (EFS) Account

Steps

<table>
<thead>
<tr>
<th>2.1.1</th>
<th>Start</th>
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<tbody>
<tr>
<td></td>
<td>State Employee request an EFS account from their agency.</td>
</tr>
<tr>
<td></td>
<td>Agency Approves Request</td>
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</table>

| 2.1.2 | Agency ISO completes required information |

| 2.1.3 | Agency ISO submits the request ticket |

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<tr>
<th>2.1.4</th>
<th>Service Center notifies:</th>
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<tr>
<td></td>
<td>Requestor and requestor Agency ISO</td>
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<tr>
<td></td>
<td>DTI Telecom</td>
</tr>
<tr>
<td></td>
<td>Each receive an email notification</td>
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</tbody>
</table>

| 2.1.5 | Telecom retrieves the request ticket |

| 2.1.6 | Telecom processes the request ticket and creates the EFS account |

| 2.1.7 | Telecom Updates the ticket status in Service Center |

| 2.1.8 | Service Center generates email notice to DTI Fiscal that ticket is in Fiscal queue |

| 2.1.9 | Fiscal retrieves the request ticket and updates the requesting agency EMS account |

| 2.1.10 | Fiscal closes the Service Center Request ticket |

| 2.1.11 | Service Center generates an email notification to the requestor that EFS account has been created. Notification includes web address with instructions and activation information |

END
3.2 Procedure to Modify an Existing Exchange Fax Service (EFS) Account

2.2.0
Start

2.2.1
State Employee requests a modification to an existing EFS account, from their agency.

2.2.2
Agency ISO completes required information

2.2.3
Agency ISO submits the request ticket

2.2.4
Service Center notifies:
- Requestor and requestor Agency ISO
- DTI Telecom
Each receive an email notification

2.2.5
Telecom retrieves the request ticket

2.2.6
Telecom processes the request ticket and modifies the EFS account

2.2.7
Telecom updates the ticket status in Service Center

2.2.8
Service Center generates email notice to DTI Fiscal that ticket is in Fiscal queue

2.2.9
Fiscal retrieves the request ticket and updates the requesting agency EMS account

2.2.10
Fiscal closes the Service Center Request ticket

2.2.11
Service Center generates an email notification to the requestor/ISO that the EFS account has been modified

END
### 3.3 Procedure to DELETE an EFS Account

2.3.0 **Start**

2.3.1 **Agency ISO completes required information**

2.3.2 **Agency ISO submits the request ticket**

2.3.3 **Service Center notifies:**
- Requestor and requestor Agency ISO
- DTI Telecom
  Each receive an email notification

2.3.4 **Telecom retrieves the request ticket**

2.3.5 **Telecom processes the request ticket and removes the EFS account**

2.3.6 **Telecom Updates the ticket status in Service Center**

2.3.7 **End**

Service Center generates email notice to DTI Fiscal that ticket is in Fiscal queue

Fiscal retrieves the request ticket and updates the requesting agency EMS account

Fiscal closes the Service Center Request ticket

Service Center generates an email notification to the requestor that the EFS account has been deleted.
3.4 Chargeback methodology

Outbound Faxes:
Access to EFS is maintained by DTI and the associated costs are charged back to users based on actual fax usage as collected from the EFS server logs. The number of outgoing faxes is totaled and the agency is charged at the flat rate of 10¢ each, regardless of the length, connection time or number of pages. These are bulk-billed to the agency’s EMS Cost Center account monthly.

Inbound Faxes:
In order to receive an incoming fax, a DID line is required. Although there is no charge per incoming fax, there is a fee for the DID line which is 30¢ per DID. This cost is billed to the agency’s cost center on their monthly EMS statement from DTI Cost Recovery.

If a customer needs the detailed itemization of all faxes sent and/or received from a particular email account, contact the DTI Service Desk to make that request.

4.0 Reference Documents
4.1 “How To Use” Instructions are on the DTI Extranet Exchange Fax Service under “Desktop Faxing”