Phonebook Update Documentation

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RELATIONSHIP DIAGRAM

The new, updated phonebook is compiled from various data sources as depicted in the following diagram.
Internal Phonebook

- First Aid Listing
- Service Pages
- Department:
  - Phonebook
  - Description, Fax, Phone, Email, Web
  - Site Address

**Concept HR** is maintained by Human Resources.

**User Account Management** is maintained by the ITS Help Desk.

**Phonebook Maintenance** is maintained by individual departments, schools and divisions.
LOGGING ON

To get to the phonebook maintenance screen log into the staff landing page at https://www.waikato.ac.nz/landing/staff.shtml using your username and password.

Navigate to the IT Services section:

Click on the Phonebook Maintenance link.

Then select the appropriate link for updating information.
INTERNAL PHONEBOOK STAFF CONTACTS

This screen is used to maintain the contact details for individual staff members.

You can Insert, Modify or Remove contact details for the staff member.

Click the Staff Contacts link from the Internal Phonebook Homepage.

Retrieve the staff member that you require to update. To make your selection you can do one of the following:

- If you know the exact full name of the staff member or part of the staff member’s name (eg WELLS, J) enter it in the name field and then click the find button.

- If you don't know the staff name enter % in the field, click the find button and all the entries will be retrieved.
Internal Phonebook

Click the link of the staff member you wish to update.

<table>
<thead>
<tr>
<th>Name</th>
<th>Preferred Name</th>
<th>Department</th>
<th>Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>SMITH, JACQUELINE MIHARANGI</td>
<td>Jackie</td>
<td>Te Timatanga Hou</td>
<td>KaoMātauranga</td>
</tr>
<tr>
<td>SMITH, JAMIE TERRENCE</td>
<td>Jamie</td>
<td>WKS Public Relations</td>
<td>Casual</td>
</tr>
<tr>
<td>SMITH, JANICE EVELYN</td>
<td>Janice</td>
<td>Societies and Cultures</td>
<td>Administrative Secretary</td>
</tr>
</tbody>
</table>
You will notice that you are not able to modify a staff member’s name, position or department.

If a name is incorrectly spelt, or if a position title is wrong the Human Resource Management Division need to be notified. You can e-mail them at hrm@waikato.ac.nz. The e-mail requesting the change should come from the supervisor of the staff member in question. This will speed up the process.

The fields that you maintain in this screen are:

- Cell Phone Number (CP)
- Room Number (RM)
- Extension Number (EX)

The extension number needs to be recorded correctly so it appears as expected in the Phone Book.

- The length of the extension field is restricted to 12 characters.
- If there are multiple extension numbers, use a comma to separate them eg 6765,
4671

The extension contact type value can not be left blank as it identifies a person to be included in the phonebook. However, if there is no extension for the person, type Unknown in that field and the person will not be included in the phonebook. The other fields are optional, they don’t require any information.

- Fax Number (FX)
- Direct Line (PO)

The suggested format for Fax number and Direct line is as follows:

- Leading international STDs **should not** be entered eg. +64 or 64
- Ensure local STDs have a leading 0 eg. 07, 09
- The complete number should use spaces as the separator eg 07 544 3333
**Inserting New Contact Details**

Select a contact type from the dropdown list.

Tab across to the “value” field and type in the relevant information for the contact type you selected e.g. 6767 for an extension.

You can continue to tab to contact type again to select another contact type to insert if required.

Once you have finished adding all the contact details, hit the Save button to save your record.

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Once you hit the Save button you are returned back to the Staff Contacts page where you can search again for the next staff member you need to maintain.
Modifying Contact Details

Click on the value field/s of the contact type you want to modify.

The contact type cannot be changed but the value field can be modified.

Make your change and click on the Save button to save your change/s.

You have successfully completed your change and are returned to the Staff Contacts page.

Deleting Contact Details

To remove a contact you need to modify the contact type using the dropdown list and choose a blank contact type.

You do not need to remove what is in the value field, once you have selected the blank contact type and hit the save button, the contact will be removed completely.
INTERNAL PHONEBOOK STAFF ORDER

This screen is used to maintain the staff order (the order the staff are to be listed) for the Internal Phonebook.

Click the Staff Order link from the Internal Phonebook Homepage.

Retrieve the department that you require to update. To make your selection you can do any one of the following:

- If you know the Department code or part of the Department code eg IS, enter in the code and click the Find button.

- If you know the Phonebook Description or part of the Phonebook Description tab to the Phonebook Description field and enter it in e.g. Inform* and click the Find button.

- If you don’t know either the code or the description enter % in either field and all the entries will be returned
Click the link of the department you wish to update.
Internal Phonebook

The phonebook will list staff with the lowest order number first. Staff with the same order number, are listed alphabetically.

This screen enables you to change the order of the staff in your Department for the Phonebook. For example, you might want your Manager/Chairperson/Director to be at the top of your Department but their surname currently sees them at the bottom of your list.

The phonebook order defaults to 9999, this means the department is initially ordered alphabetically.

When changing the order leave some space between the numbers to allow for staff changes. For example, order in spaces of 5 or 10 (10, 15, 20) not (10, 11, 12). This will make it easier for you to maintain in the future as new staff arrive in your department.
To Change the Listing

- Click on the Order in Department field, this is the only field that can be modified.
- Change the order from 9999 to whatever is appropriate. In this example I have changed the Project Manager to be listed 3rd instead of 4th in the list by modifying the order number to be 210 which is higher than 110 (the person listed in second place).

Click the save button once the order has been changed to save your changes, you will be returned back to the Staff order main page.

You should return to the department to check the change has been correctly reflected in your list.
You can see below the project manager is now third in the list.

Select any another staff members you need to change.
Continue this process until you have the staff members for your department in the correct order for the Internal Phonebook.

You can use staff order to associate a secretary with their respective manager:

- Manager A = order 10
- Secretary to Manager A = order 15
- Manager B = order 20
- Secretary to Manager B = order 25

You can also use the same number to order staff. An example of this could be if you wanted to list all the staff members in your department who have the same positions. Giving the same order number to those positions will group them together, they will then order alphabetically within that group. See the example below where all the programmer/analysts are grouped together:

![Internal Phonebook Staff Order within Departments](image-url)
INTERNAL PHONEBOOK DEPARTMENT DATA

This is used to maintain information about your department for the Internal Phonebook.

The fields that you maintain in this screen are:

- Phonebook Description (40char)
- Phone Number (11 char)
- Fax Number (11 char)
- Web site address
- E-mail contact (32 char)

Click Department Data link from the Internal Phonebook Homepage.

To retrieve the department/s that you require to update, click on the Department Contacts and Rooms link.
Retrieve the department that you require to update. To make your selection you can do any one of the following:

- If you know the dept code or part of the dept code eg IS, enter it in the Department Code field and click the Find button
- If you know the Phonebook Description of the department (or part of the description e.g. Inform), enter it in the Phonebook Description field and click the Find button
- If you don’t know the code or the description enter % in either field and all the entries will be retrieved.
Click the link on the entry you wish to update.
It is not necessary for you to enter information in each of the fields. If you don’t have the information leave the field blank, it is not mandatory.

You will notice that the field called Formal Description is not accessible to you. This information is maintained in accordance with the Corporate Structure, if you have any queries about this data please contact the Vice Chancellor’s Office.

If you have the information available, you are able to update the following fields:

- **Phonebook Description (40char)**

The phonebook description is the description of your department that you want in the Internal Phonebook. Department names are taken from the Corporate structure and sometimes these are not ideal when looking up the department in the phonebook. This facility allows for the department name to be changed as per the example - ITS has been added to the beginning of Information Technology Services.
Internal Phonebook

- Phone Number (11 char)
- Fax Number (11 char)

Phone numbers and fax numbers need to be recorded correctly so they appear as expected in the Phone Book.
  - The length of the phone number and fax number fields is restricted to 11 characters.
  - Leading international STDs **should not** be entered eg. +64 or 64
  - Ensure local STDs have a leading 0 eg. 07, 09
  - The complete number should use spaces as the separator eg 07 544 3333

- Web site address
- E-mail contact (32 char)

- Room

You are able to add rooms that are relevant to your department, e.g. labs, instrument rooms, machine/Console Rooms.

To add a room, click the Add a Room button.

Enter the details for the room as follows:

- Room Name – e.g. Glasshouse, Molecular Bio Lab
- Room Number – the actual room number, you can use the lookup functionality if you need to.
Internal Phonebook

- Phone – The extension number for the room.
- Description – The type of room e.g. laboratory
- Order – used to order the rooms (Room order will default alphabetically).

Once your changes have been made click on the Save button to save your changes. You are taken back to the Department details you are maintaining.

Once you have completed all your changes to the department, click the save button to save your changes.

You have successfully completed your change/s and are returned to the Department Contacts and Rooms page where you can search again for the next Department you need to maintain.

**Cross Referencing**

Cross Referencing is used for those departments that are known as something other than the official phonebook description of the department.

For example ITS Waikato Print is known as Printery and also Waikato Print. By using the cross reference facility these alternatives can be entered and they will then have a cross reference to ITS Waikato Print e.g. Printery – see ITS Waikato Print

Click the Department Cross References link from the Department Data main page.
Retrieve the department that you require to update. To make your selection you can do any one of the following:

- If you know the dept code or part of the dept code eg IS, enter it in the Department Code field and click the Find button
- If you know the Phonebook Description of the department (or part of the description e.g. Inform), enter it in the Phonebook Description field and click the Find button
- If you don’t know the code or the description enter % in either field and all the entries will be retrieved.
Internal Phonebook

Enter the cross reference text you want in the phonebook and click on the Save button to save your changes.

You have successfully completed your change/s and are returned to the Department Cross reference page where you can search again for the next Department you need to maintain.

External Organisations

Click External Organisations link from the Department Data main page.
Retrieve the organisation that you require to update. To make your selection you can do any one of the following:

• If you know the organisation code or part of the organisation code eg UR, enter it in the Organisation Code field and click the Find button

• If you know the Phonebook Description of the organisation (or part of the description e.g. Uni), enter it in the Phonebook Description field and click the Find button

• If you don’t know the code or the description enter % in either field and all the entries will be retrieved.
Click the link of the organisation you wish to update.
Update the details and hit the save button when complete.
You have successfully completed your change/s and are returned to the Department External Organisations page where you can search again for the next external organisation you need to maintain.

**INTERNAL PHONEBOOK STAFF ROLES**

Staff Roles is used to enter an additional role a staff member may have. The role is not the official position of the staff member. For example a staff member may be a Justice of the Peace or a Chairperson.

Click Staff Roles link from the Internal Phonebook Homepage.

Retrieve the staff member that you require to update. To make your selection you can do one of the following:

- If you know the exact full name of the staff member or part of the staff member's name (eg WELLS, J) enter it in the name field and then click the find button.
- If you don't know the staff name enter % in the field, click the find button and all the entries will be retrieved.
Choose the department the role relates to from the dropdown list. (Note that if you want to enter a Justice of the Peace there is a department for Justice of the Peace).

The position ID will default to ROLE.

Enter the Position name e.g. Justice of the Peace

Enter the start date and the end date of the role.

If you have more than one role to enter for the person, repeat the process.
Once you have completed all the details, click on the Save button to save your changes. You have successfully completed your change/s and are returned to the Staff Roles main page where you can search again for the next staff member you need to maintain.

You should retrieve the staff member again via Staff Contacts link and ensure the new role for the staff member is assigned the appropriate contact details. Contact details from the main position the staff member holds do not automatically get loaded against the new role. It is also likely that the contact details are different for the new role you have added.

**Remove a Role**
To remove or end-date a role, set the end date to today’s date. Click the Save button to save your changes.

### INTERNAL PHONEBOOK EXTERNAL CONTRACTORS
External Contractors is used to enter a role a person may have but the person is not a staff member of the University of Waikato. For example staff for the University Rec Centre or the Creche.

Click External Contractors link from the Internal Phonebook Homepage.

Retrieve the external contractor that you require to update or insert. To make your selection you can do one of the following:

- If you know the exact full name of the contractor or part of the contractor’s name (eg WELLS, J) enter it in the name field and then click the find button.
- If you don’t know the contractor name enter % in the field, click the find button and all the entries will be retrieved.
You are shown a list and can see if the person is a current staff member or not. If the person you want to enter is a current staff member you should use Staff Roles rather than an External Contractor.

If the person you want to enter is not listed at all, then click on the Insert button to add a new contractor.
Enter the Contractor’s details as follows:

- Contractor name – this should be entered with the surname first followed by comma, space and then the first name.
- Title
- Department – choose the department the contractor will working for, from the dropdown list provided.
- Position ID – this will default to CONTRACT
- Position Name – enter the position name the contractor has for the department
- Start date – This will default to today, you can change this if required.
- End Date – This needs to be entered, a contractor will have an end-date for their position.

Once you have completed all the details, click the Save button to save your changes.

You have successfully completed your change/s and are returned to the External Contractors main page where you can search again for the next staff member you need to maintain.

You should retrieve the contractor again via Staff Contacts link and ensure the new contractor is assigned the appropriate contact details.
Remove a Contractor
To remove or end-date a contractor, set the end date to today’s date. Click the Save button to save your changes.
PHONEBOOK SERVICE PAGES

This screen is used to maintain information for the service pages of the Internal Phonebook.

The fields that you maintain in this screen are:

• Service Description

• Phone Number

Phone numbers need to be recorded correctly so they appear as expected in the Phone Book.

- Leading international STDs should not be entered eg. +64 or 64
- Ensure local STDs have a leading 0 eg. 07, 09
- The complete number should use spaces as the separator eg 07 544 3333

Click Service Pages link from the Internal Phonebook Homepage.
Retrieve the service that you require to update. To make your selection you can do any one of the following:

- If you know the description of the service or part of the description eg Academic, enter in the text and click the Find button.

- If you don’t know any of the text enter % in the field and all the entries will be retrieved.

Click the link of the entry you wish to update.
Modify the Service description and/or the phone number and click the save button.

You have successfully completed your change/s and are returned to the Service Pages main page where you can search again for the next service you need to maintain.

**Inserting a New Record**

To insert a new record in the service pages, first you should search for the service you want to add. This is to check the service you want to insert hasn’t already been entered and you are not duplicating the service entry.

Once you are sure it is not listed click the Insert button.

Enter the relevant information. Once your information is complete, click the save button.

You have successfully completed your change/s and are returned to the Service Pages main page where you can search again for the next service you need to maintain.
Deleting a Record

Retrieve the service you wish to delete and click the link of the service. To delete the record, click on the Delete button.

A popup box will appear which says Delete this service OK, or Cancel?

If you click on Cancel the record stays and you return to the same page, if you click on OK the record will be deleted and you are returned to the Service Pages main page.

Be sure the service is the one you want deleted.
APPENDIX 1 – Phonebook Help

The University of Waikato internal phonebook is generated entirely from data held in the University's Human Resources and Corporate databases. All information is dynamic and updated automatically from the University of Waikato databases on a daily basis. This ensures that the data is always current, accurate and easily maintained. If a staff member is missing from the Phonebook, it may be because-

- He/she is not a current staff member
- There is no phone number recorded against his/her name in the corporate database
- His/her current position is not recorded in the HR database
- His/her details have been added to the HR database since last night

As a Phonebook Updater, you are able to maintain Phonebook data for the departments you have been given access to-

- Staff contacts - rooms, extensions, cell phones
- Staff order - the order in which a staff member appears within a department
- Service Pages
- Department contacts - rooms, phone numbers, fax numbers, web addresses, email contacts

The following changes will need to be forwarded to the appropriate person-

- No username, Incorrect or multiple usernames - ITS Help Desk
- First Aid Pages - HR (Health & Safety Coordinator, ext 8039)
- Staff Position, name, title or department changes - HR Advisor
- Department name changes (40 character limit) - ITS Help Desk
- Department Structure - HR Director

If you require access to Internal Phonebook screens, please complete an ITS Further Privileges Application Form and send it to the ITS Help Desk.