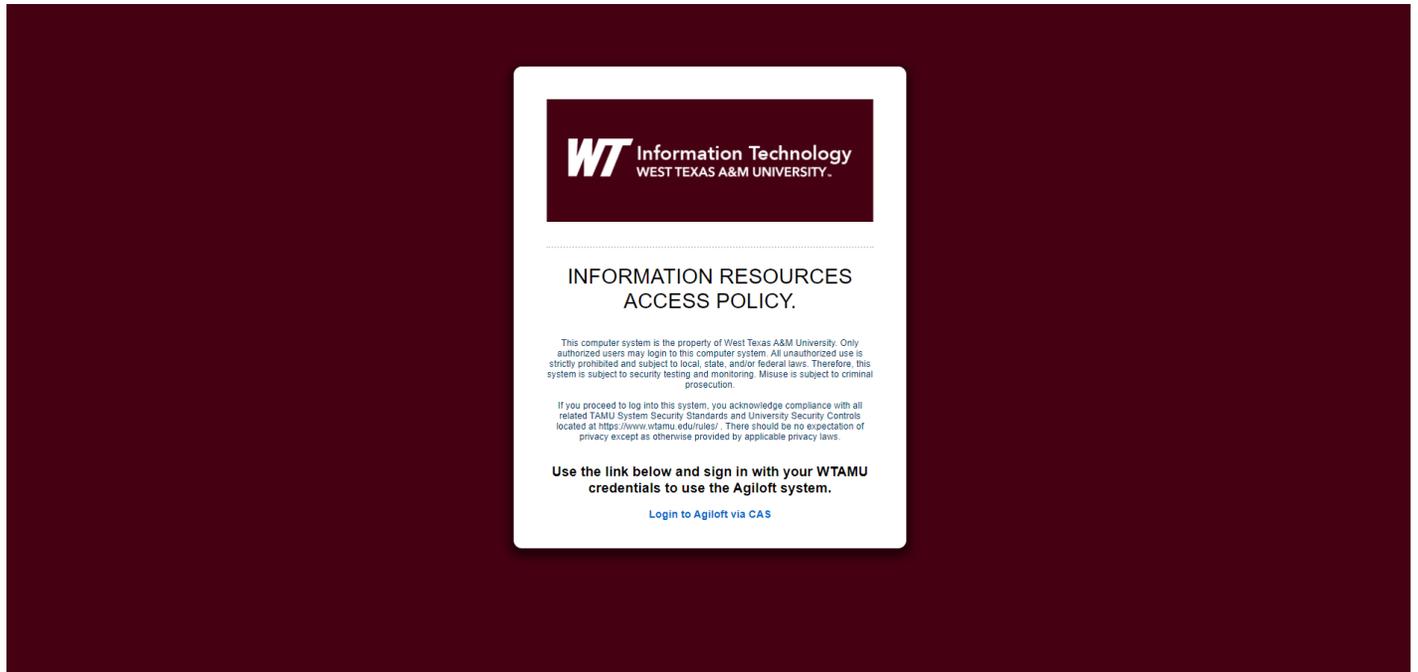
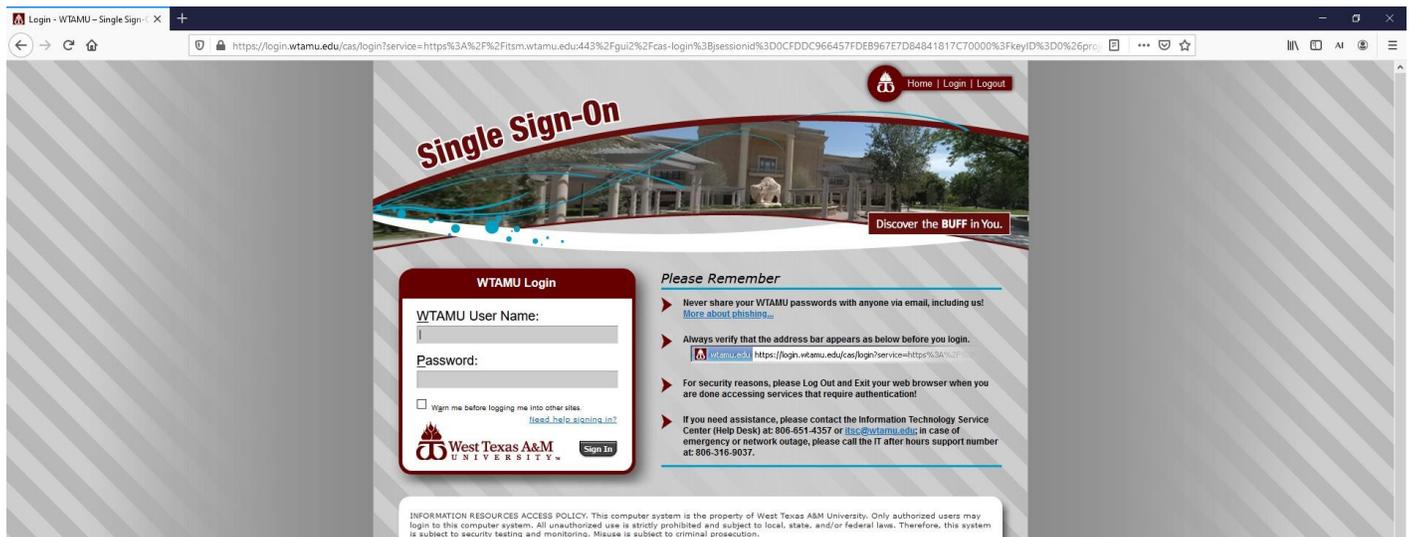


Annual Billing Corrections in Agiloft

Visit <https://itsm.wtamu.edu> (must be on campus or connected to VPN):



Choose 'Login to Agiloft via CAS'. Sign in normally via WTAMU Single Sign-On:



You will land on 1 of 2 different pages, depending on if you also use Agiloft for advanced functions, such as approving Change Requests, or approving Texas Administrative Code 213 Exceptions.

Basic User Workflow

If you see a screen similar to the one below, continue on through the instructions in order. If not, skip to the [Advanced User Workflow](#) below.

The screenshot shows the WTAMU Agiloft System home page. At the top left is the WT Information Technology logo. At the top right, the user is identified as 'User: bbuffalo' with a 'Logout' link. A navigation toolbar contains buttons for 'Home', 'New Request', 'New Incident', 'My Requests', 'My Incidents', 'My TAC213 Exception Requests', 'My Project Requests', and 'My Billing Corrections'. The main content area is titled 'Welcome to the WTAMU Agiloft System' and includes a sub-header: 'As an end user, you can create service requests, incidents, and review your items. Use the toolbar above to create a new request, or to view previously submitted requests.' Below this are four main action buttons: 'Submit Service Request' (with subtext 'Submit a new Service Request'), 'Submit Incident Request' (with subtext 'Submit a new Incident Request'), 'My Service Requests' (with subtext 'View your previously submitted service requests'), and 'My Incidents' (with subtext 'View your previously submitted incidents'). On the right side, there is a 'Quick Links' menu with categories: 'Employees' (with links for New Employee, Employee Department Transfer, Office Change Request), 'Networking/Telephone' (with links for Network Drop Request, Network Cable Request, Telephone Install, Telephone Conversion, Relocate Telephone Extension, Disconnect Telephone Extension), 'Accessibility' (with link for Texas Administrative Code 213 Exception Request), 'Billing Corrections' (with link for Billing Correction), and 'Projects' (with link for Project Request). A search bar is located at the top right of the main content area. At the bottom center, it says 'Powered by Agiloft'.

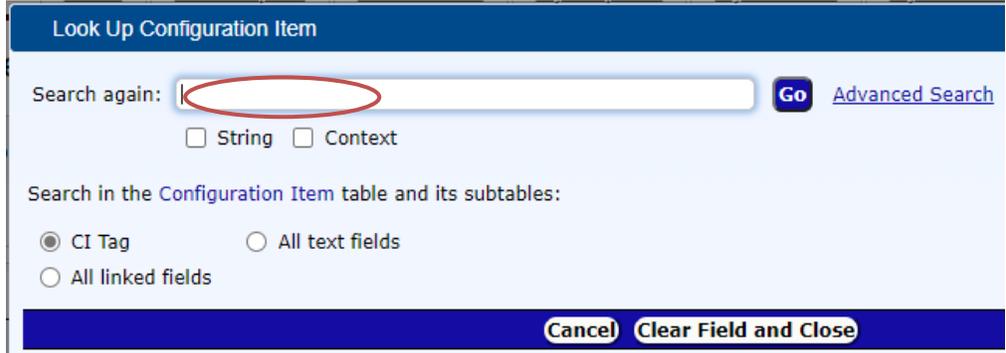
From the home page above, click on **Billing Corrections** on the *right-hand* Quick Links menu. You will be taken to a form to complete:

The screenshot shows the 'Submit a Billing Correction' form. At the top left is the WT Information Technology logo. At the top right, the user is identified as 'User: bbuffalo' with a 'Logout' link. A navigation toolbar contains buttons for 'Home', 'New Request', 'New Incident', 'My Requests', 'My Incidents', 'My TAC213 Exception Requests', 'My Project Requests', and 'My Billing Corrections'. The main content area is titled 'Submit a Billing Correction'. Below the title is a form header with 'Save' and 'Cancel' buttons, and the text 'Billing Corrections'. Below this is a field for 'ID: 218'. The form is divided into sections: 'Billing Change' (with expand/collapse arrows), 'Collapse All', and 'Contact Details' (with a dropdown arrow). The 'Contact Details' section contains the following information: 'Created By: Bucky Buffalo', 'Phone: 651-xxxx', 'Email: mreagan@mail.wtamu.edu', and 'Correction For: Choose one' (with a dropdown arrow).

Choose from the drop-down menu which the correction is for:

➤ **Device**

1. Enter the WT ID or click on  to search.
 - Enter WT number in field; click **Go**.



Look Up Configuration Item

Search again: **Go** [Advanced Search](#)

String Context

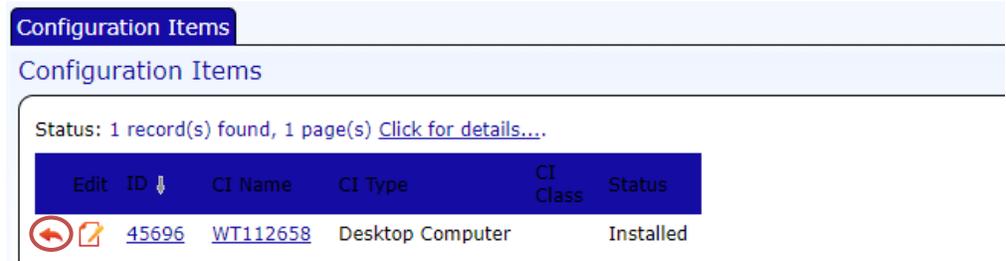
Search in the Configuration Item table and its subtables:

CI Tag All text fields

All linked fields

Cancel **Clear Field and Close**

- To select the **Device** entered in the search under the Configuration Items, click on the **back arrow**.



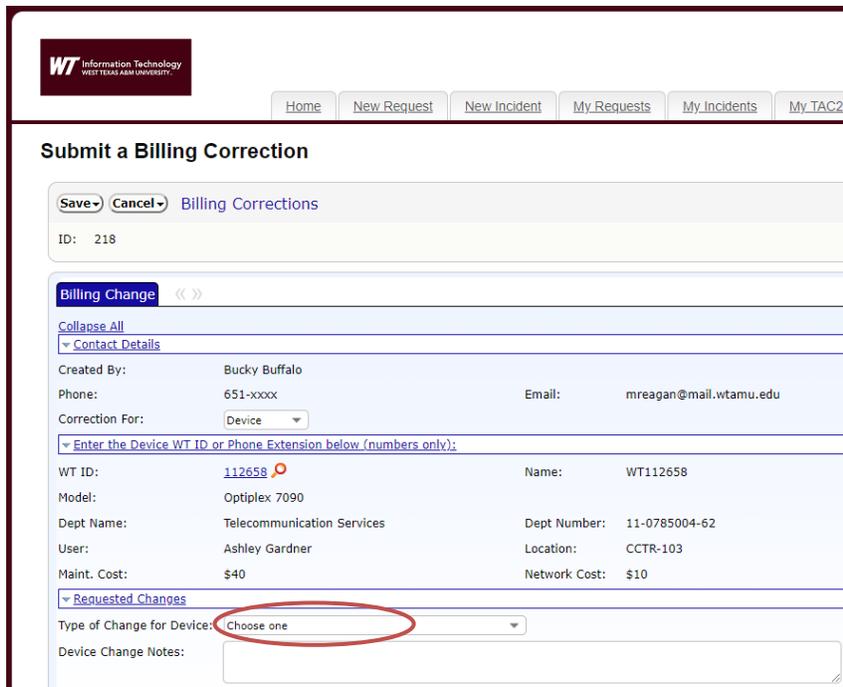
Configuration Items

Configuration Items

Status: 1 record(s) found, 1 page(s) [Click for details...](#)

Edit	ID ↓	CI Name	CI Type	CI Class	Status
	45696	WT112658	Desktop Computer		Installed

2. Select the **Type of Change for Device** from the drop-down menu and include as much information possible.



WT Information Technology
WEST TEXAS A&M UNIVERSITY

[Home](#) [New Request](#) [New Incident](#) [My Requests](#) [My Incidents](#) [My TAC21](#)

Submit a Billing Correction

Save **Cancel** Billing Corrections

ID: 218

Billing Change << >>

[Collapse All](#)

[Contact Details](#)

Created By: Bucky Buffalo
Phone: 651-xxxx Email: mreagan@mail.wtamu.edu

Correction For:

[Enter the Device WT ID or Phone Extension below \(numbers only\):](#)

WT ID: [112658](#)  Name: WT112658

Model: Optiplex 7090

Dept Name: Telecommunication Services Dept Number: 11-0785004-62

User: Ashley Gardner Location: CCTR-103

Maint. Cost: \$40 Network Cost: \$10

[Requested Changes](#)

Type of Change for Device:

Device Change Notes:

3. Press **Save** at the *top left corner* to ensure your request is processed. You're all done! You will receive an email confirmation from Agiloft soon.

The screenshot shows the 'Submit a Billing Correction' form. At the top left, there is a logo for 'WT Information Technology WEST TEXAS A&M UNIVERSITY'. Below the logo are navigation buttons: 'Home', 'New Request', 'New Incident', 'My Requests', and 'My Incidents'. The main heading is 'Submit a Billing Correction'. Below this, there are two buttons: 'Save' (circled in red) and 'Cancel'. To the right of these buttons is the text 'Billing Corrections'. Below that, the ID '218' is displayed. The form is divided into sections. The first section is 'Billing Change' with navigation arrows. Below it is a 'Collapse All' link and a 'Contact Details' section. The 'Contact Details' section contains the following information: 'Created By: Bucky Buffalo', 'Phone: 651-xxxx', 'Email: mreagan@mail.wtamu.edu', and 'Correction For: Device' (with a dropdown arrow).

➤ **Phone**

1. Enter **Phone Extension** in field.
2. Select the **Type of Change for Device** from the drop-down menu and include as much information possible.
3. Press **Save** at the *top left corner* to ensure your request is processed.

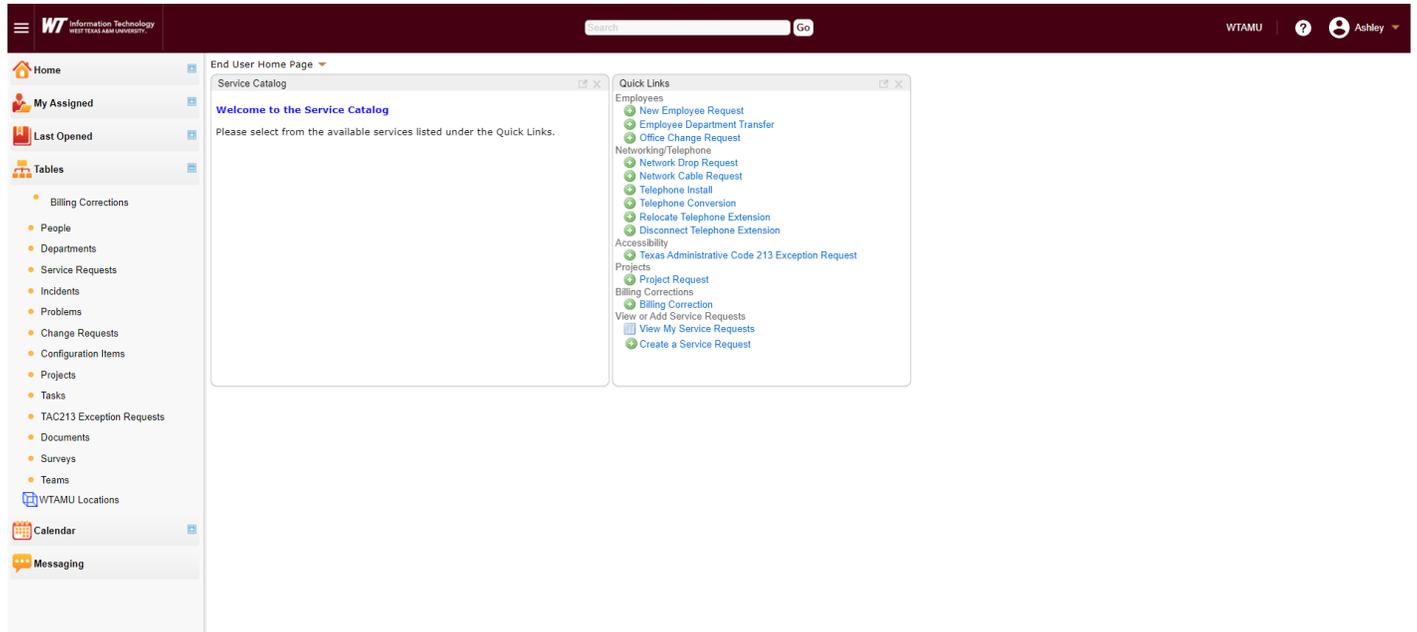
This screenshot shows the 'Submit a Billing Correction' form with additional fields. The 'Save' button is circled in red. The 'Correction For:' dropdown is set to 'Phone'. Below this, there is a link: 'Enter the Device WT ID or Phone Extension below (numbers only):'. The 'Phone Extension:' field is empty and circled in red. Below that is a 'Requested Changes' section. The 'Type of Change for Phone:' dropdown is set to 'Choose one' and is circled in red. The 'Phone Change Notes:' field is empty.

You're all done! You will receive an email confirmation from Agiloft soon.

--END OF BASIC USER WORKFLOW--

Advanced User Workflow

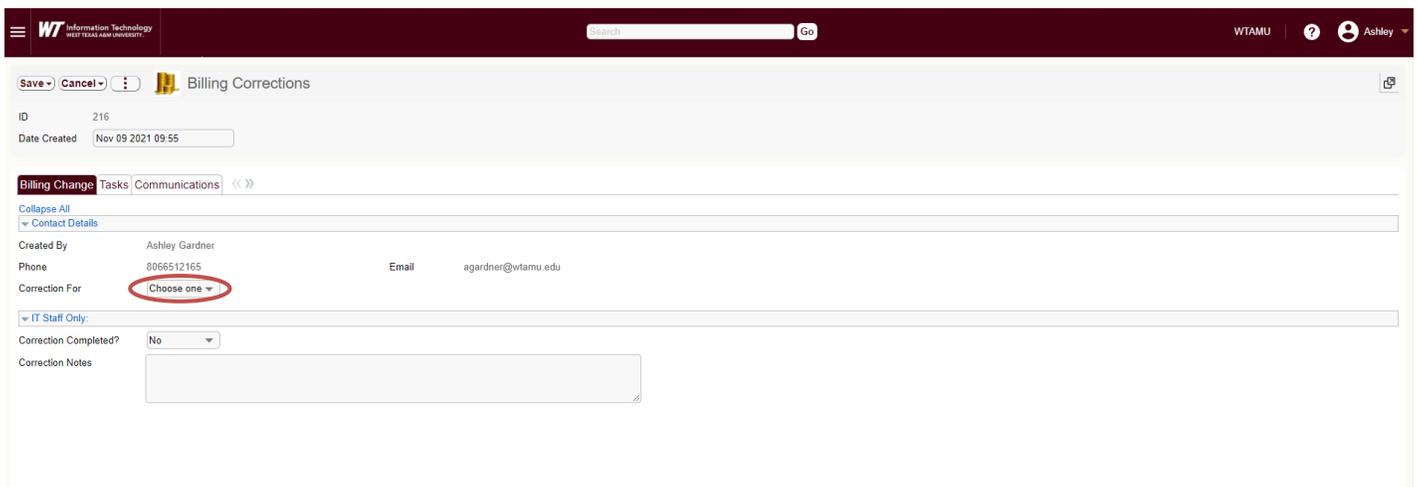
If you see a screen similar to the one below, continue on through the instructions in order.



Expand the 'Tables' menu at the bottom of the left-hand tree, if it is not already. Do this by clicking on the Plus sign icon to the right of Tables.

Scroll down and select the 'Billing Corrections' table by clicking on 'Billing Corrections'. Click on 'New' to create a new Correction Request.

You will be taken to the Billing Correction Form:

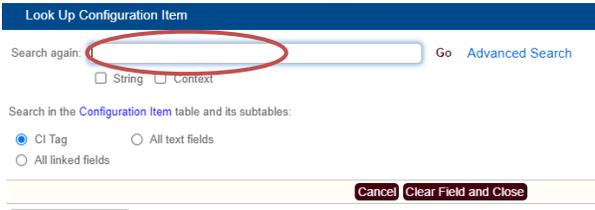


Choose from the drop-down menu if the correction is for:

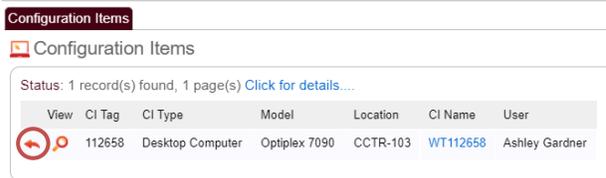
➤ **Device**

1. Enter the WT ID or click on  to search.

- Enter WT number in field; click **Go**.

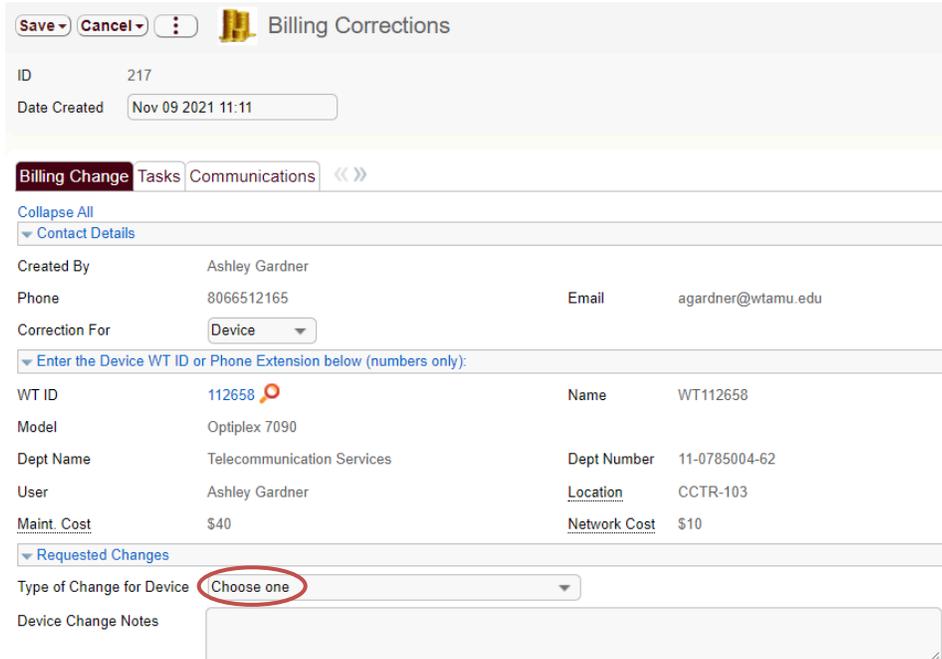


- To select the **Device** entered in the search under the Configuration Items, click on the **back arrow**.



View	CI Tag	CI Type	Model	Location	CI Name	User
	112658	Desktop Computer	Optiplex 7090	CCTR-103	WT112658	Ashley Gardner

2. Select the **Type of Change for Device** from the drop-down menu and include as much information possible.



Billing Corrections

ID: 217
Date Created: Nov 09 2021 11:11

Billing Change | Tasks | Communications

[Collapse All](#)
[Contact Details](#)

Created By: Ashley Gardner
Phone: 8066512165
Email: agardner@wtamu.edu

Correction For: **Device**

Enter the Device WT ID or Phone Extension below (numbers only):

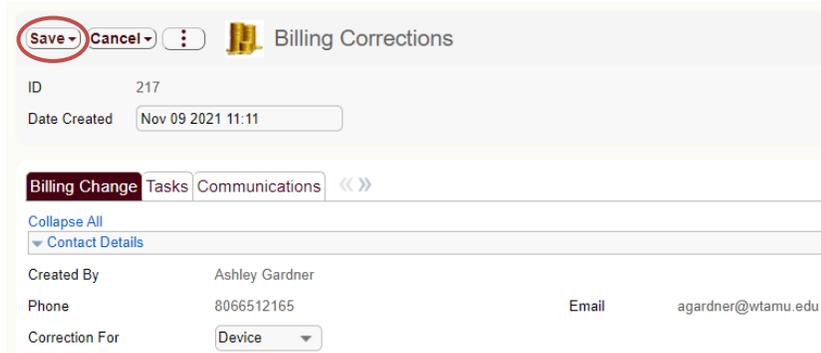
WT ID	112658 	Name	WT112658
Model	Optiplex 7090		
Dept Name	Telecommunication Services	Dept Number	11-0785004-62
User	Ashley Gardner	Location	CCTR-103
Maint. Cost	\$40	Network Cost	\$10

Requested Changes

Type of Change for Device: **Choose one**

Device Change Notes:

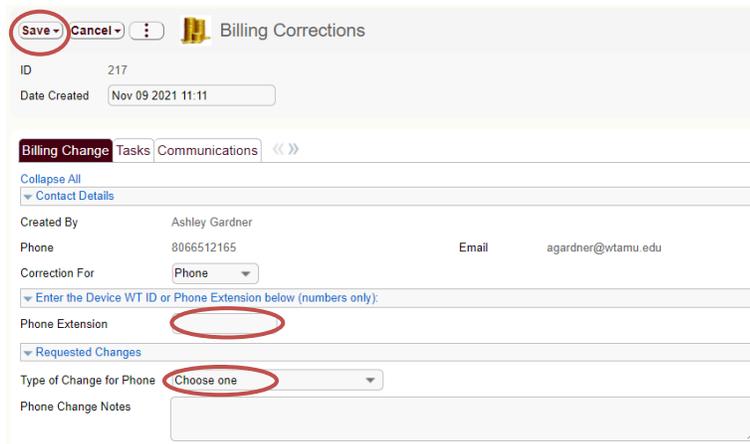
3. Press **Save** at the *top left corner* to ensure your request is processed. You're all done! You will receive an email confirmation from Agiloft soon.



The screenshot shows the top portion of a web form titled "Billing Corrections". At the top left, there are three buttons: "Save" (circled in red), "Cancel", and a menu icon. Below these are fields for "ID" (217) and "Date Created" (Nov 09 2021 11:11). A navigation bar contains "Billing Change" (highlighted), "Tasks", and "Communications". A "Collapse All" link and a "Contact Details" dropdown are visible. The form fields include "Created By" (Ashley Gardner), "Phone" (8066512165), "Email" (agardner@wtamu.edu), and "Correction For" (Device).

➤ **Phone**

4. Enter **Phone Extension** in field.
5. Select the **Type of Change for Device** from the drop-down menu and include as much information possible.
6. Press **Save** at the *top left corner* to ensure your request is processed.



This screenshot shows the same form as above, but with additional fields. The "Correction For" dropdown is now set to "Phone". Below it is a text field with the placeholder "Enter the Device WT ID or Phone Extension below (numbers only):". The "Phone Extension" field is circled in red. Below that is a "Requested Changes" dropdown, and the "Type of Change for Phone" dropdown is also circled in red, showing "Choose one". A "Phone Change Notes" text area is at the bottom.

You're all done! You will receive an email confirmation from Agiloft soon.

--END OF ADVANCED USER WORKFLOW--