Requesting New Exchange Accounts

User Guide

University of Central Florida
CS&T Service Desk
**Table of Contents**

Requesting an Individual Account ........................................................................................................ 1
  Before Creating a Request ..................................................................................................................... 1
  Creating a Request ................................................................................................................................. 1
  Verifying Account Creation .................................................................................................................. 3

Requesting an Organizational Account .................................................................................................. 4
  Before Creating a Request ..................................................................................................................... 4
  Creating a Request ................................................................................................................................. 5
    Fill In New Account Information ....................................................................................................... 5
    Fill In Departmental Information (Required for all three types) ...................................................... 7
  Verifying Account Creation .................................................................................................................. 10

Viewing Account Requests ..................................................................................................................... 11
  Searching for a User eForm request ...................................................................................................... 11
  Searching for an Organizational eForm request .................................................................................. 13

Appendix A: FAQ ...................................................................................................................................... 15

Document Version Control ..................................................................................................................... 16
Requesting an Individual Account

As an ePAF Originator or IT Manager, you have been assigned the Exchange Requester role. This new role gives you the ability to request new Exchange accounts online.

If you do not have the Exchange Requester role, you will not have access to the Exchange eForm. In that case, please submit your new Exchange account request to your area’s ePAF originator (very often the person who processes your timesheet) or IT Manager.

If you have any questions about Exchange account requests, please contact the UCF Service Desk.

Before Creating a Request

Please gather the following information:
- EmplID of the individual who needs an Exchange account

Creating a Request

myUCF portal: Staff Applications>Campus Solutions>Main Menu>CS&T Custom>Exchange eForms Home Page

Once you are prepared, please sign in to the myUCF portal (www.my.ucf.edu), go to Staff Applications and then Campus Solutions. Select the Main Menu at the top of the screen, and then CS&T Custom and Exchange eForms Home Page.

For individual account requests, select Add User Account eForm.
Please enter the employee ID number in the **EmpID field** and then press the **Enter** key.

After pressing Enter, the First and Last name field will populate. Verify the employee’s name is listed correctly and then click on the **Submit** button.

- If the user’s name is not correct, please contact Human Resources (407-823-2771) to have their record corrected before requesting the account.

Once you click the Submit button, a message will appear asking “Submit this form?”. Click on the **Yes** button to submit the form.

The form may take several seconds to submit. Check the upper right-hand corner of the window for the progress indicator if you are uncertain if the form is being sent.

Once the form is submitted the Step 2 window will open. Verify that the status says, “**You have just AUTHORIZED this form.**” You can exit the eForm at this point.
Request Submitted E-mail:
Once you submit a request an e-mail is sent to your UCF e-mail account. This notice says that the request has been received and the account will be available the next business day for the new user.

Verifying Account Creation
The following business day the individual should access their new Exchange account.

Have them open a browser and go to http://webmail.ucf.edu
They should sign in to the NET domain with their NID and NID password.

Username: NET\NID
Password: NID Password

They should click on Options in the upper right hand corner of the window.
Click on Show All Options...
Requesting an Organizational Account

As an ePAF Originator or IT Manager, you have been assigned the Exchange Requester role. This new role gives you the ability to request new Exchange accounts online.

If you do not have the Exchange Requester role, you will not have access to the Exchange eForm. In that case, please submit your new Exchange account request to your area’s ePAF originator (very often the person who processes your timesheet) or IT Manager.

If you have any questions about Exchange account requests, please contact the UCF Service Desk.

Before Creating a Request
Please gather the following information before creating a request:

- Name of the account (alphanumeric, no spaces and no special characters).
  - Ex: cstawards
  - Organizational accounts are not to be used for individuals. UCF affiliated individuals should be processed with the Exchange Add User Account eForm. An individual who needs to become UCF affiliated, should go to https://publishing.ucf.edu/sites/itr/cst/Pages/ISOResources.aspx and submit the Account/Access/Termination Request Form.
- How the account should be listed in the Exchange Address Book. (no colons or semi-colons)
  - Ex: CS&T Awards Nominations
- Building Abbreviation and room number (if applicable)
- EmplID and phone number of authorized users for the account. Minimum of two and maximum of three users are allowed.
- Department name
- Department phone number.
Creating a Request
myUCF portal: Staff Applications>Campus Solutions>Main Menu>CS&T Custom>Exchange eForms Home Page

Once you are prepared, please sign in to the myUCF portal (www.my.ucf.edu), go to Staff Applications and then Campus Solutions. Select Main Menu, CS&T Custom and then Exchange eForms Home Page.

For an organizational e-mail account requests, select Add Organizational Account eForm.

Fill In New Account Information

Choose one the three Account Types: Departmental, Room or Equipment.

Departmental

To request a Departmental e-mail account, click on the button by Departmental.

In the Account ID requested field, type the name of the account. NOTE: Do not use spaces or special characters.

In the Exchange Address Book Display Name field, type in the how you wish the account to be listed. Note: Do not use colons or semi-colons.
Room

To request a Room account, click on the button by Room.

In the Building field, type the abbreviation of your building and then press the Enter key.
- Use all capitalized letters. ex: mh is not accepted but MH is.

In the Room Nbr field, select the correct room from the drop down box. The Account ID requested field will automatically populate with building and room number.

Select the correct Room Type from the drop down list.
- Collaborative Space
- Conference Room
- Meeting Room
Equipment

To request an Equipment account, select the button by Equipment.

In the Account ID requested field, type the name of the account. NOTE: Do not use spaces or special characters.

In the Exchange Address Book Display Name field, type in the how you wish the account to be listed. Note: Do not use colons or semi-colons.

Select the desired equipment type from the drop down menu.

- Golf Cart
- Other
- Phone
- Projector

Fill In Departmental Information (Required for all three types)

Please enter the employee ID number in the EmplID field and then press the Enter key. The First and Last name will populate. Verify the employee’s name is listed correctly. In the Office Phone field, type in the authorized user’s phone number.

- At least two users have to be responsible for the account, click the plus sign (+) on the right and add the employee ID of the other user(s). There can be a maximum of 3 users responsible for an account.
In the Department Name field, type your department’s name. In the Department Phone field, type your department’s phone number. Once you have verified that all the information is correct, please select Submit.

Select Yes to submit the form.

The form may take several seconds to submit. Check the upper right-hand corner of the window for the progress indicator if you are uncertain if the form is being sent.

The “Step 2 of 2: Form Submitted” page will open. It should say that you have just submitted the form. You can exit the eForm at this point.
Request Submitted E-mail:
Once you submit a request an e-mail is sent to your UCF e-mail account. This e-mail says that an approver will review the request and submit it.

Request Processed E-mail:
Within 2 business days the approver will process your request and a second e-mail will arrive. The e-mail should indicate that your request was approved and that the new account will be created within 2 business days of receiving the approval. The e-mail will also provide information about the new account.
Verifying Account Creation

Once the account owner has the gotten the password, they should access their new Exchange account.

Have them open a browser and go to http://webmail.ucf.edu

They should sign in to the NET domain with the organizational account ID and the password.

Username: NET\Account ID
Password: Password

They should click on Options in the upper right hand corner of the window.

Click on Show All Options...

The My Account tab will be open by default. Under General they will see their Display name. This is the name that will display in the Address book. They will also see their e-mail address <username>@ucf.edu.
Viewing Account Requests

Searching for a User eForm request

myUCF portal: Staff Applications>PeopleSoft SA/HR>Department Self Service>Exchange eForms Home Page

Once you are prepared, please sign in to the myUCF portal (www.my.ucf.edu), go to Staff Applications and then PeopleSoft SA/HR. Select Department Self Service and then Exchange eForms Home Page.

For an individual e-mail account requests, select View User Account eForm.

You can search by eForm ID, EmplID (of new user), Name (of new user), original operator (submitter) or by date.

Once you have filled in the information you want to search with, please select Search.

The ID number can be found on the request submitted and request processed e-mails.

First and Last Name will search for the name of the new Exchange user.

Original operator uses the PID of the person who submitted the request.
If the search returns a list, select the correct entry.

The eForm will open and you can verify details of the request using the information on Step 1 and Step 2 of the form.
Searching for an Organizational eForm request
myUCF portal: Staff Applications>PeopleSoft SA/HR>Department Self Service>Exchange eForms Home Page

Once you are prepared, please sign in to the myUCF portal (www.my.ucf.edu), go to Staff Applications and then PeopleSoft SA/HR. Select Department Self Service and then Exchange eForms Home Page.

For an organizational account requests, select View Organizational Account eForm.

You can search by eForm ID, organizational account name, original operator (submitter) or by date.

The ID number can be found on the request submitted and request processed e-mails.

Account ID requested is the organizational account name requested.

Original operator uses the PID of the person who submitted the request.

Once you have filled in the information you want to search with, please select Search.
If the search returns a list, select the correct entry.

The eForm will open and you can verify details of the request using the information on Step 1 and Step 2 of the form.
Appendix A: FAQ

What should I do when I get an error about the EmplID does not exist?

If you have a UCF affiliated individual who needs an account, please contact Human Resources or your ePAF originator to verify that the proper roles and relationships to the institution have been assigned to the user’s account.

An individual who needs to become UCF affiliated, should go [https://publishing.ucf.edu/sites/itr/cst/Pages/IsoResources.aspx](https://publishing.ucf.edu/sites/itr/cst/Pages/IsoResources.aspx) and submit the Account/Access/Termination Request Form.

My organizational account request was denied. What should I do next?
Please read the comments section of the e-mail that was sent to you. It should list why the account was denied. You can submit another eForm with the corrected information to have your account created. If there were no comments, please contact the UCF Service Desk at 407-823-5117 during regular business hours or e-mail servicedesk@ucf.edu regarding this situation.

I noticed a mistake on the request after I submitted it, how do I correct that mistake?
Please contact the UCF Service Desk at 407-823-5117 during regular business hours or e-mail servicedesk@ucf.edu and inform them about any corrections that need to be made.

How do I get an Exchange account for someone not working directly for UCF?
Requests for Exchange user accounts can only be made for individuals who are directly affiliated with UCF. To become affiliated with UCF, the individual will need to go [https://publishing.ucf.edu/sites/itr/cst/Pages/IsoResources.aspx](https://publishing.ucf.edu/sites/itr/cst/Pages/IsoResources.aspx) and submit the Account/Access/Termination Request Form. Once they have obtained permission and credentials for the use of University network, equipment, facilities and services an eForm request can be submitted for their Exchange account.
## Document Version Control

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Name</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>2/3/11</td>
<td>AP</td>
<td>Initial Release</td>
</tr>
</tbody>
</table>