Pinnacle Departmental Web Portal User's Guide

Open your browser
Supported Browsers as of 1/3/2006 include:

Windows Platform:
IE 5.5 or higher
FireFox 1.0.x
Mozilla 1.7.8
Netscapt 1.7.8

MAC OSX(10.3.x)
FireFox 1.0.x
Netscape 7.2
Mozilla 1.7.8

Pinnacle's Departmental Web Portal can be accessed by going to http://www.paetecasp.com/bu52 and selecting the option for DEPARTMENTAL PORTAL. (On some desktops, you will need to actually click on the label "Departmental Portal", not the little check box beside the label, so if selecting the icon doesn't work, click on the label.)

You will be presented with a login screen. You must enter your BU Kerberos Id and Password, and your RSA Secure ID number. Once authenticated you will be presented with the DEPARTMENTAL PORTAL. The top line of the screen will have the BU Logo on your left, followed by "DEPARTMENTAL PORTAL". Underneath this header you will see, "Welcome YOUR NAME". Through this portal you will be able to view information only for the departments for which you have been assigned as a contact.

On the top upper right of the portal page, you will see the functions available to you, as a departmental contact. These include:

Services
Reports
Maintenance
My Reports
Home
Help
Logout

The main function you will use initially is Reports. Reports will give you billing information, about the telecommunications services which are assigned and billed to your department .

REPORTS

From the REPORTS tab, you can access billing information in multiple formats. When you select the REPORTS tab, you will be presented with a web page with the following TABS:

Department Usage, Call Usage, and Analysis.
(In some cases where you are assigned as a Contact for specific Accounts for example 0-020-123-XXXXX, which might be for a grant or special project you will also see a tab labeled **"Account Usage")**

Department Usage:

The Departmental Usage report is a key element of the Web Portal. This report can be generated as HTML, EXCEL or PDF. It reflects all of the usage charges and assigned charges (monthly recurring and one time charges –MRC/OCC) for the individuals assigned to the departments you represent, and it breaks down the charges by account and sub code. The options for generating a Departmental Usage Report are based on the billing cycles for your departments. Only billing cycles that have been run and posted will be displayed.

When you select the Departmental Usage Report option, a list of billing cycles will be displayed. The list will include all of the billing cycles for each department for which you are a contact.

To run the Departmental Usage report you must do the following:

Select from the drop down list, the Department for which you want to run the report.
Select from the drop down list the Output Format (Excel, HTML or PDF)
Select the Bill Period (you need to click in the radio button next to each bill cycle, to select the bill period)
To get the Detail breakdown on all individual subscribers (includes all phone lines in the department) you **MUST** check off the box next to **INCLUDE INDIVIDUAL DETAIL**
Select from the drop down box the Report to Run (only option currently is the Departmental Usage report)
Once you have made all your selections, click on "'Click Here' to run report.

In some cases, you will then get a window that asks you to please be patient while the report runs. When the report is finished it may appear right in this window (depends on how your browser options are defined). If it does not appear right in the active window, then to view the report, you will need to select the "MY REPORTS" tab at the top of the Departmental Portal page.
This will bring you to a page with TABS that include 'REPORTING", "Settings" and "OUTPUT"
On the REPORTING Tab under the column heading of REPORT TITLE you should see

"Department Usage with Detail".
Click on this title – and you will be brought to an OUTPUTS tab – where all of the Department Usage reports you have run to date should be listed. (the date/time you ran the report is in the DATE column).
Find the report you just ran and CLICK on it to open it up, or you can RIGHT CLICK on the correct report to OPEN TARGET in a NEW WINDOW, SAVE TARGET to your C drive or PRINT the Document.

*** If, when you try to open the report and it has been run in ADOBE PDF format, and you get a BLANK screen, there is a FIX you can apply. To get the fix do the following:

For Version 4.0, 5.0 or 6.0 of ADOBE
Go to : http://www.adobe.com/support/techdocs/325875.html

For Version 7.0 of ADOBE
Go to: http://www.adobe.com/support/techdocs/328233.html

The top portion of the report is organized according to individual subscribers (Departmental Subscriber Summary section). The report also displays the subscriber usage by account and sub code, (Subscriber Summary for Acct x-xxx-xxx-xxxxx, and the total Account Summary for this account).

In the DEPARTMENTAL SUBSCRIBER SUMMARY, all the subscribers assigned to this unit/department are listed. Please note a subscriber could be a person, or it could be a service, such as a fax line or modem line, or alarm. Along with each subscriber, the report lists the charges for this particular subscriber for this bill period, broken down by

- Total Charges for the bill period
- Monthly Recurring Charges (MRC)
- One Time Charges (OCC)
- Toll Charges (inter and intrastate long distance charges)
- Local Charges

Following the Departmental Subscriber Summary, you will have a Subscriber Summary for each of the Accounts that roll up to this department. The information in the Subscriber Summary by Account is much the same as in the Departmental Subscriber Summary.

The next portion of the Departmental Usage Report (if you selected to Include Individual Detail) gives you the detail billing information for each 'subscriber' in your department. You will see the call detail about each subscriber's calls. You will see the following information:

- subscriber name,

- date and time of each call
- phone number from which the call is made
- Phone number to which the call is made,
- location of the called to number
- call duration
- charge for this call

Each phone line that is billed to your department will have a unique Subscriber ID with the service type of VOICE. All local calls are found under the classification Service: Voice. You will see a Subscriber ID (a 7 digit system generated number), followed by a label SERVICE: VOICE . For Service type of VOICE, the calls will be organized based upon the type of call that is made, i.e. Local calls, Directory Assistance calls, and depending upon the type of restrictions on the phone line you may see TOLL and International Calls (if the phone line has been set up for Unrestricted Access – meaning no ARS CODE is required to make Long Distance Calls).

Following the call detail – you will see the MRC charges (for equipment and billable features) that are assigned to this particular subscriber (which will be a phone line). If there were any work orders done on this particular service during the latest bill cycle, you will also see another section that details out the OneTime Charges and Credits (OCCs) associated with the Work Order for this service.

At the end of each subscriber's total charges you will see the Expense Summary – which gives you the total 0912 charges (for local and toll usage charges) and the 0911 charges (for fixed charges – equipment and work order related charges) for this subscriber.

Pinnacle identifies those calls that are made using an ARS code through the use of a Separate Service type "PBN". You can view the charges associated with calls made with your ARS code listed as a Subscriber ID (a 7 digit system generated number), followed by a subscribers name and then a SERVICE: PBN and a system generated reference number for the PBN (REF-XXXX). These REF-XXXX numbers are not the actual 5 digit BU provided ARS CODE, they are system generated labels that are displayed to protect the security of the actual ARS CODE number itself. The types of calls that are under this classification include Directory Assistance, Toll Calls and Overseas Calls. In the past, you would see your intrastate long distance calls tracked in terms of Message Units and Toll Charges. Pinnacle does not distinguish between intrastate and interstate toll calls, so they are all summarized as "Toll Calls".

If you want to send the detail on an individual subscriber's bill to that particular individual, you can easily do this by selecting the Output format of EXCEL. Once the report is run in EXCEL format, you will need to press the "MY Reports" tab at the top of the portal page. You will be presented with a page "Existing Report Output". You will see a line item, ' Departmental Usage with Detail (crystal)' followed by the date on which you ran the report . Right click on this item, and select 'Save Target As' to save the report and view it as an Excel spreadsheet. You can open the spreadsheet and copy and past the individual detail records into separate EXCEL worksheets – so that you can then either print the spreadsheets or email them to the appropriate individual subscribers.

Account Usage:
In any Department, there may be multiple Unit/Department/Source accounts to which telecommunication charges can be billed. (ex you may have multiple grant accounts used to charge services) The Account Usage Report lets you look at all charges from all telecommunications services that are being billed to a specific unit- department-source account. The account usage report will reflect all of the usage charges and assigned charges (monthly recurring and one time charges) only for billing cycles that have been run and posted.

To run an Account Usage report:

Select the Account for which you wish to run the report
Select the Output Format (Excel, HTML or PDF)
Select the Bill Period (you need to click in the radio button to select the bill period)
To get the Detail breakdown on all individual subscribers (includes all telecommunications services billing to this account) you MUST check off the box next to INCLUDE INDIVIDUAL DETAIL
Select the Report to Run (only option currently is the Account Usage report)
Once you have made all your selections, click on "'Click Here' to run report

In some cases, you will then get a window that asks you to please be patient while the report runs. When the report is finished it may appear right in this window (depends on how your browser options are defined).

If it does not appear right in the active window, then to view the report, you will need to select the "MY REPORTS" tab at the top of the Departmental Portal page.
This will bring you to a page with TABS that include 'REPORTING", "Settings" and "OUTPUT"
On the REPORTING Tab under the column heading of REPORT TITLE you should see "Department Usage with Detail".
Click on this title – and you will be brought to an OUTPUTS tab – where all of the Department Usage reports you have run to date should be listed. (the date/time you ran the report is in the DATE column).
Find the report you just ran and CLICK on it to open it up, or you can RIGHT CLICK on the correct report to OPEN TARGET in a NEW WINDOW, SAVE TARGET to your C drive or PRINT the Document.

In the ACCOUNT SUBSCRIBER SUMMARY, all the subscribers assigned to this unit/department are listed. Please note a subscriber could be a person, or it could be a service, such as a fax line or modem line, or alarm. Along with each subscriber, the report lists the charges for this particular subscriber for this bill period, broken down by

- Total Charges for the bill period
- Monthly Recurring Charges (MRC)
- One Time Charges (OCC)
- Toll Charges (inter and intrastate long distance charges)
- Local Charges

Following the Departmental Subscriber Summary, you will have an Expense SubCode Summary indicating the subcode to which these charges are billed. (ex. 0912 is for all Telecommunications Usage charges.

The next portion of the Account Usage Report gives you the detail billing information for each 'subscriber' in your department. You will see the call detail about each subscriber's calls. You will see the following information:

- Subscriber id and name
- date and time of each call
- phone number from which the call is made
- Phone number to which the call is made,
- location of the called to number
- call duration
- charge for this call

CALL USAGE

The Call Usage report displays all of the unbilled call activity for a particular department.. To create a Call Usage Report, select "Call Usage Report Embedded' in the drop down box and click on "Click Here " to run report.

Select the Output format (PDF only),
If you want to have detail on all subscribers, select TRUE for "Display Detail" drop down box
Select Start Date and End Date for the period for which you wish to see the Call Usage.
Click on RUN to have the report be generated.

To view the Call Usage Report you just ran, Select the "MY REPORTS" tab from the main "REPORTS" window of the portal. You will be presented with a listing of all the reports you have run listed by date. To view a particular report, right click on the report (in this case, the Call Usage Report Embedded for the date on which you ran the report) and select 'OPEN IN NEW WINDOW'.

In the report, you will first see **Call Usage Summary** section, giving you a summary of the duration of all calls made by all subscribers in your department in hours and minutes. It then breaks down the call minutes by call type: Toll, Local, International, Station to Station and 'Other' (basically directory assistance calls).

Next you will see the actual calls made by each subscriber in your department, including:

- Call Type
- Date and time of the call
- From number
- To number
- Call duration.

ANALYSIS

You can limit the scope of a Departmental Report by selecting the ANALYSIS tab. You can analyze invoiced charges over a particular time period for a given department. The ANALYSIS option allows you to selectively view what type of charges you want to see and what call types you want to look at.

To run an ANALYSIS, your must first select a Department
Select the OUTPUT format that you prefer (EXCEL, HTML or PDF)
Specify the Date Range over which you wish to run your analysis. (you can click on the little CALENDAR Icon  to select the dates, or you can enter them in the format MMDDYYY.)
Select the types of Charges you want to see (Usage, or Fixed Charges – Monthly or OCC)
Select one or more Usage Call Types (Use the CTRL or SHIFT key to select multiple usage types. Select "All" to select all types)

Click on the "RUN ANALYSIS" option.

You will be presented with a list of all subscribers assigned to the department. Check the subscribers for which you are running the report. If you want all subscribers included, just check the box labeled "Check/Uncheck ALL".

You will be presented with a review of the report criteria that you selected. To execute the report using this criteria, press the RUN button. Then Execute Report.

(In some cases you will see the screen say “DONE” down the bottom – but no report appears, so you may need to select the tab on the bottom of your screen for Pinnacle to have the report appear)

You will be presented with a report of all calls made by the selected subscribers during the time period you specified. They will be organized by charge type (Usage, Recurring Charges and One Time Charges), by date of the call. The information you will see includes:

Date and Time of Call
Duration of Call
Type of Call
From Number
To Number
Location called (city/state/country)
Charge for the call