UBC Information Technology

Pinnacle - DVA Manual - Phone Orders
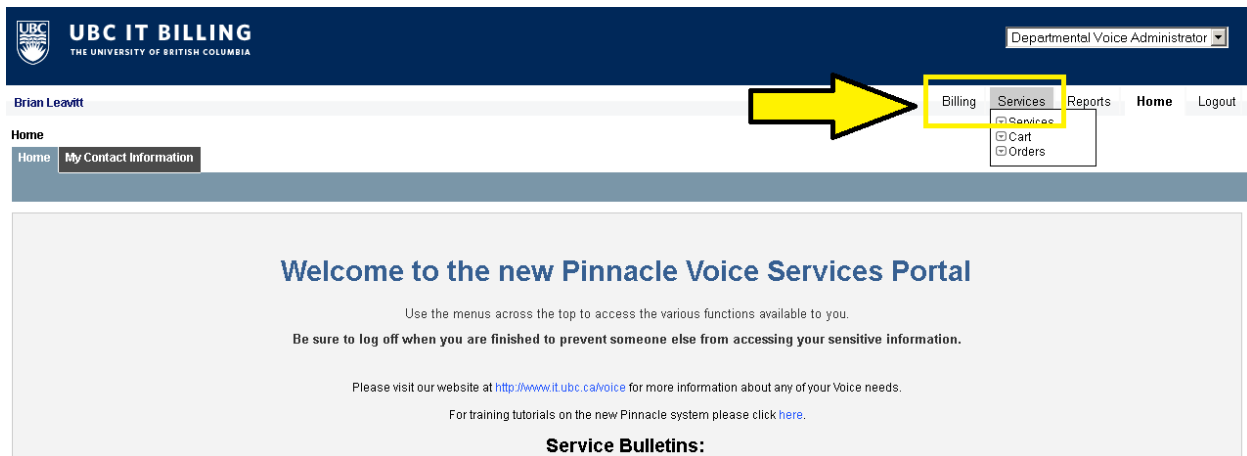
Part 1: Welcome to Pinnacle!

Hi there!

You are now a Departmental Voice Administrator (DVA) and have been granted access to the Pinnacle Portal, where you can **look up phone bills** and **place phone orders** on behalf of your department.

Let's get started. To access the Pinnacle Portal:

- Go to http://billing.it.ubc.ca
- Log-in with your **CWL username and password**.

You will see a screen that looks like this:

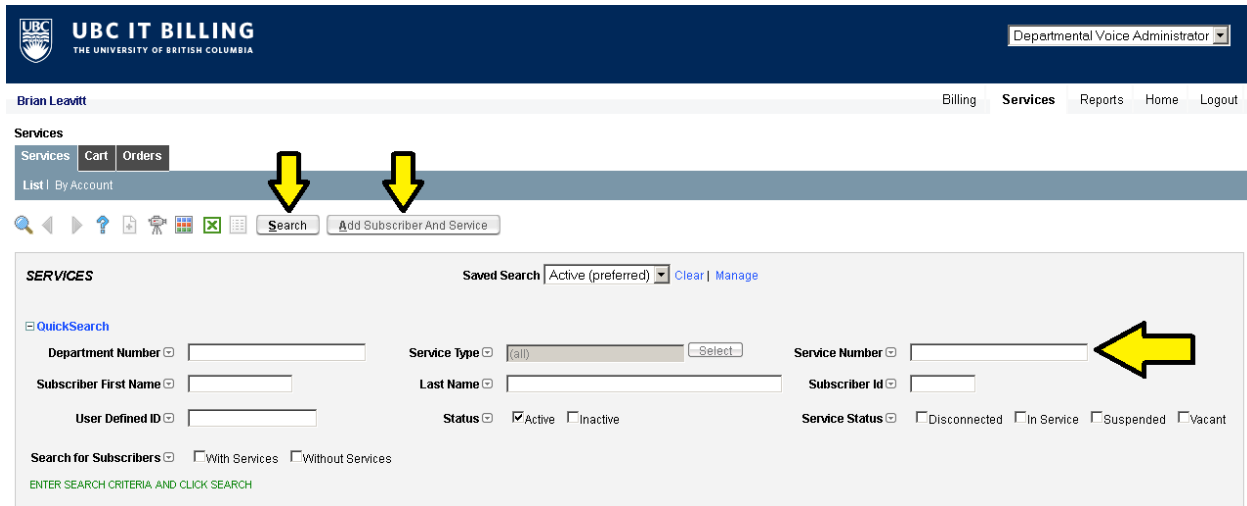In the top right of the screen, you will see two links: **'Billing'** and **'Services'**.

- To look up phone bills click on '**Billing**'.
- To place phone orders click on '**Services**'.

Would you like to **look up phone bills** or **place a phone order**?

Part 2: Placing Phone Orders

Now that you have logged into Pinnacle with your CWL account and clicked on 'Services' in the top right, you are ready to place a phone order.

You will see a screen that looks like this:

You can **place phone orders** in several ways. The most common methods are:

- You can leave all the fields blank and click on '**Search**' to display a list of all the services you have access to change.
- You can enter the 10 digit phone number of the **service you wish to change, disconnect, or move** in the '**Service Number**' box and then click on '**Search**'. Please note that it must be the full 10 digit number, with no spaces or extra characters. For example: '6048222008' would look up 604-822-2008.
- If you wish to **add a new service AND a new subscriber**, for example a new employee in a new position, click on '**Add Subscriber And Service**'.
- If you wish to **add a new service to an existing subscriber**, you can search for their current 10 digit phone number in the '**Service Number**' box, or you can enter their first and/or last names in the '**Subscriber First Name**' and '**Last Name**' boxes.

Would you like to **change, move, disconnect, or add a service to an existing subscriber** or **order a new service for a new subscriber**?

Part 2a: Changing, Adding, Disconnecting, or Moving Services for Existing Subscribers

Now that you have searched for the subscriber you wish to change, you will see a screen that looks like this:

Click on the blue highlighted phone number for the subscriber you wish to change listed under the 'Service' column. You will then be taken to a screen that looks like this:
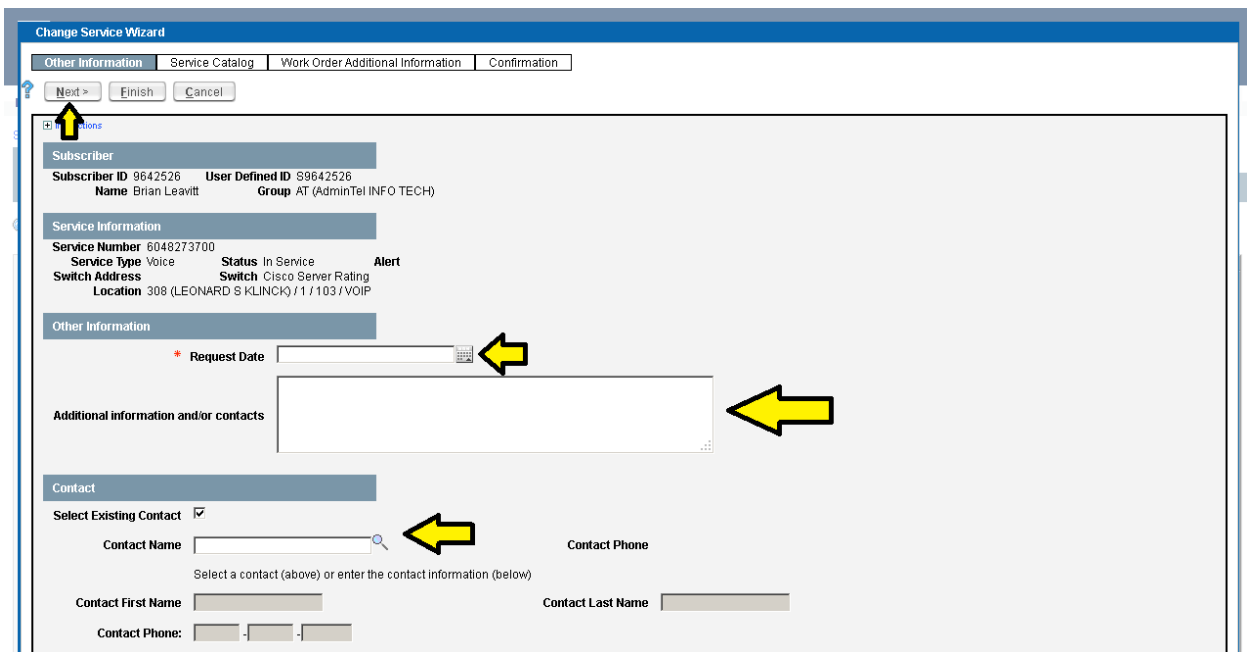
From this screen you can:

- Add a Cisco Personal Directory (VoIP speed dial)
- Add a Long Distance Authorization Number (PBN) to an existing subscriber
- Add a new service to an existing subscriber
- Add an extension to an existing line
- Add voicemail
- Change a subscriber and call display (caller ID) name
- Change Speedchart (billing) information for a service
- Disable long distance
- Disconnect a service
- Enable long distance
- Move a line (or report a VoIP phone move)
- Remove voicemail
- Reset a voicemail password (PIN)

Add a Cisco Personal Directory (VoIP Speed Dial)
Add a Long Distance Authorization Number (PBN) to an existing subscriber
Add Voice Mail
Reset a Voice Mail Password (PIN)

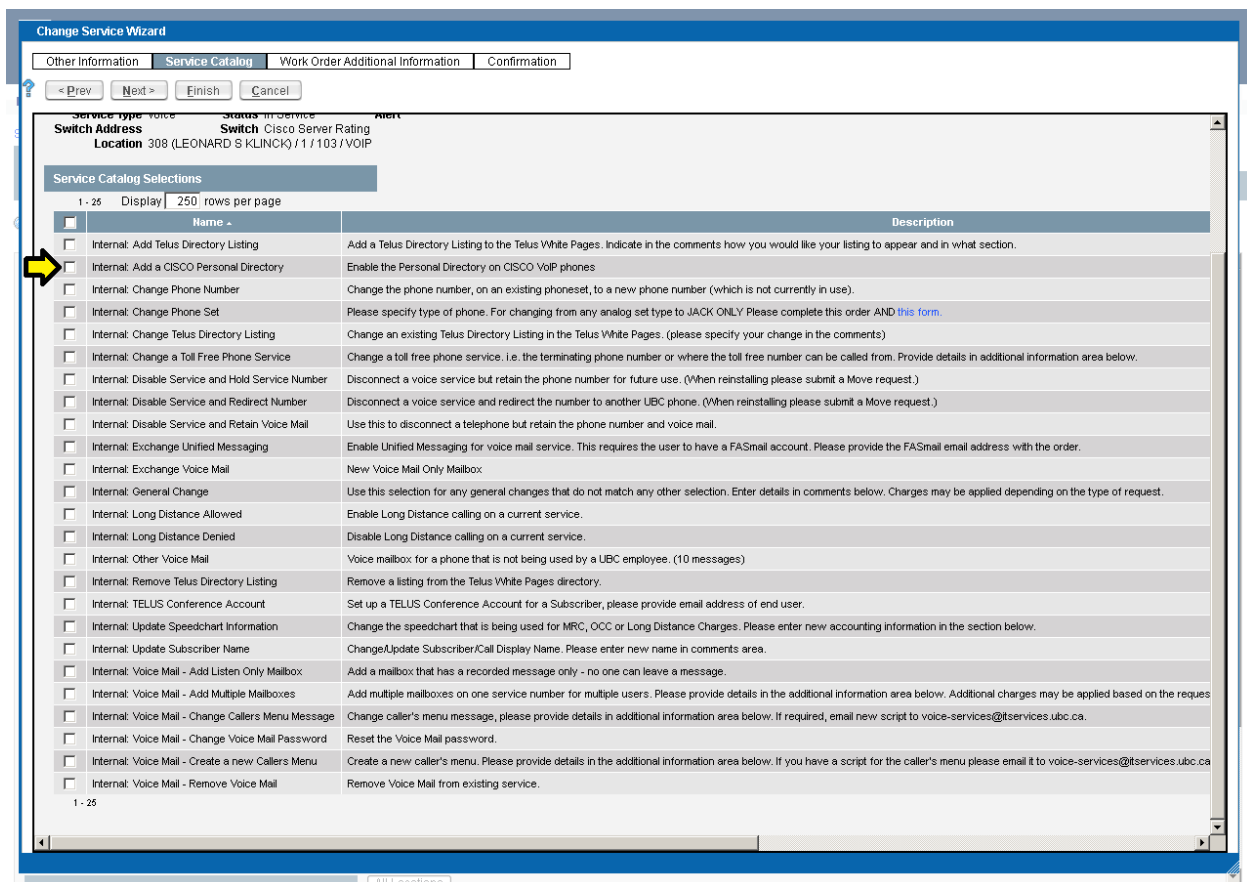From this screen: **click on 'Change Service'**.

You will now see this screen:

You will need to:

1. Enter the '**Request Date**' – the ideal date you wish the change to occur (actual completion date depends on complexity of request and current volume of requests).
2. Describe the request in the '**Additional information and/or contacts**' box, and also **include the email address you wish to be contacted at** and the **email address of the subscriber where the login and/or password information should be sent**. Describing the request in this box helps to speed up the process for the Voice Team.
3. Fill in your contact information (not the subscribers) if it is not already filled in automatically in the '**Contact**' section.
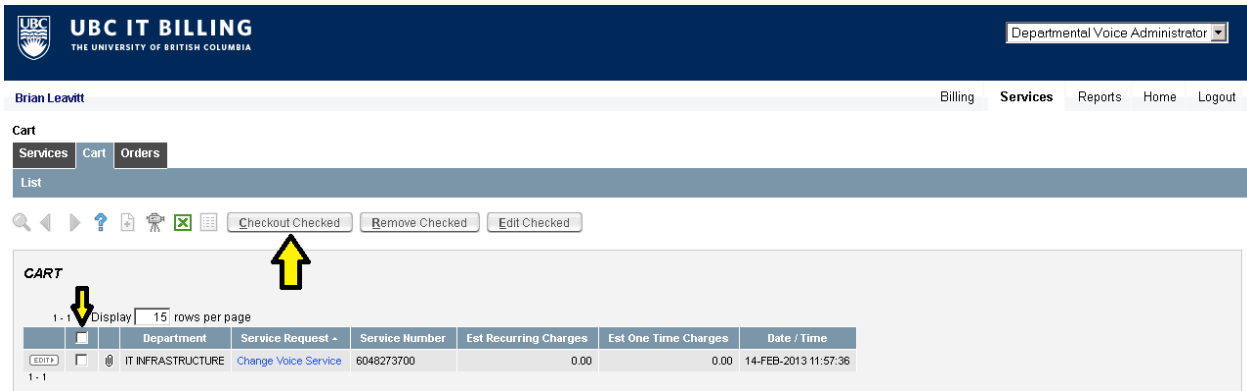4. Click '**Next**'.

You will now see this screen:

In order to view all the service catalog selections, go to the box under 'Service Catalog Selections that says 'Display xxx rows per page' and change the xxx (by default set to 15) to 250, and click on a blank part of the page to refresh the screen.
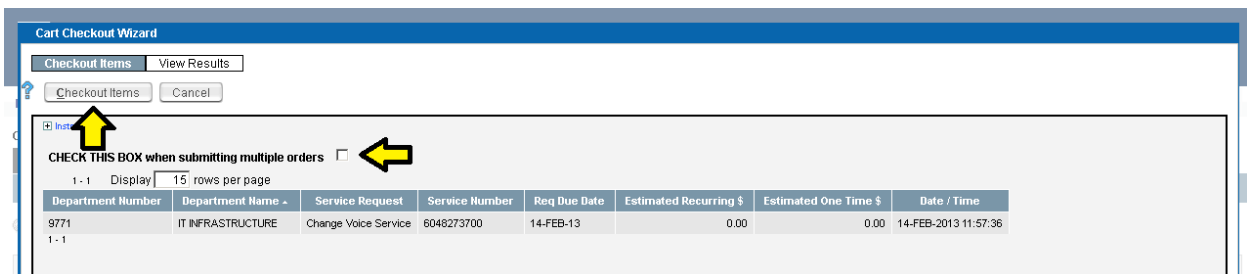
1. Place a check in the box next to:
    a. '**Internal: Voice Mail – Change Voice Mail Password**' to reset a Voice Mail password (PIN).
    b. '**Internal: Add a CISCO Personal Directory**' to enable the Cisco Personal Directory (VoIP speed dial).
2. Click '**Finish**' at the top of the screen.
3. If there are no errors, you will be taken back to the subscriber information page.
4. If you have more orders to place, click on '**Services**' and search for the next service you wish to change. If you are done submitting orders, **click on 'Cart'** at the top of the screen.

You will now see this screen:

1. **Place a check** in the box next to each order you wish to submit.
2. **Click 'Checkout Checked'.**

You will now see this screen:

1. If you have more than one order to submit, **place a check in the box next to 'CHECK THIS BOX when submitting multiple orders'**.
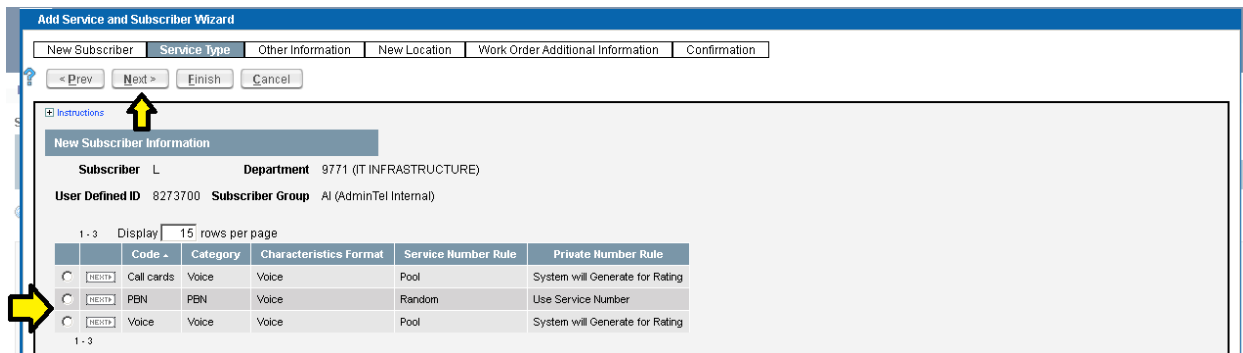2. **Click on 'Checkout Items'**.

Congratulations, you are done! – Click here to go back to Placing Phone Orders.

Add a New Service to an Existing Subscriber

From this screen: **click on 'Add'** and then a new menu will open, from there **click on 'Add Service to Subscriber'**.
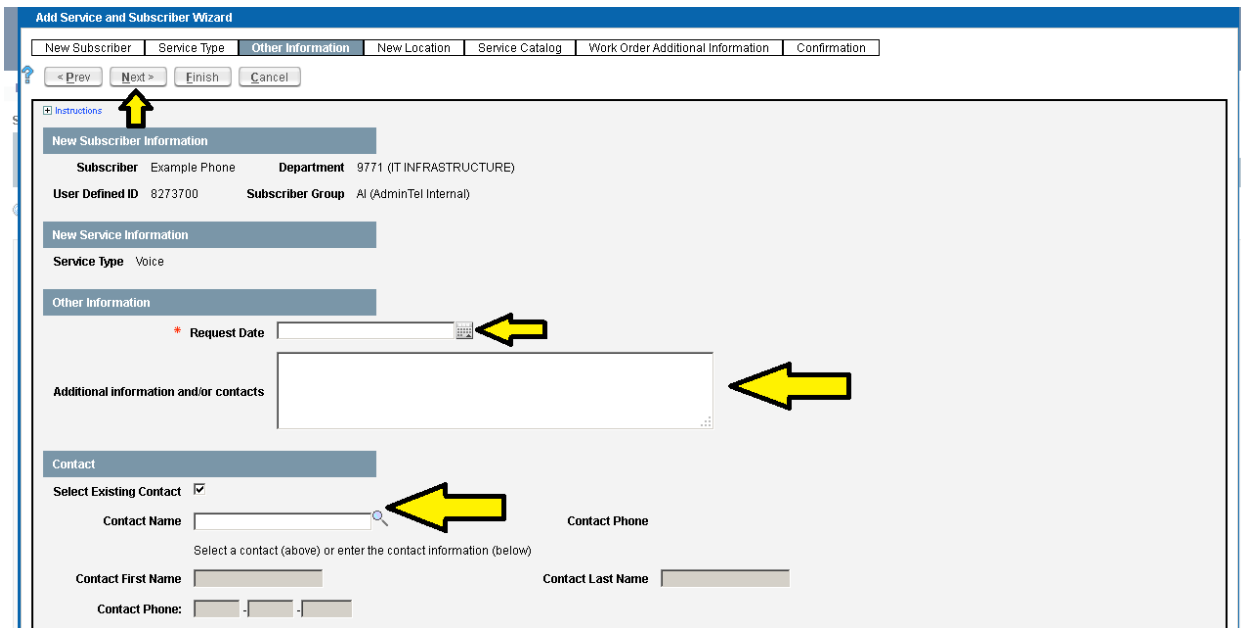
You will now see the following screen:

- If you are adding a new phone service, put a check in circle to the left of '**Voice**'.
- If you are adding a Long Distance Authorization Code (aka PBN), put a check in the circle to the left of '**PBN**'.
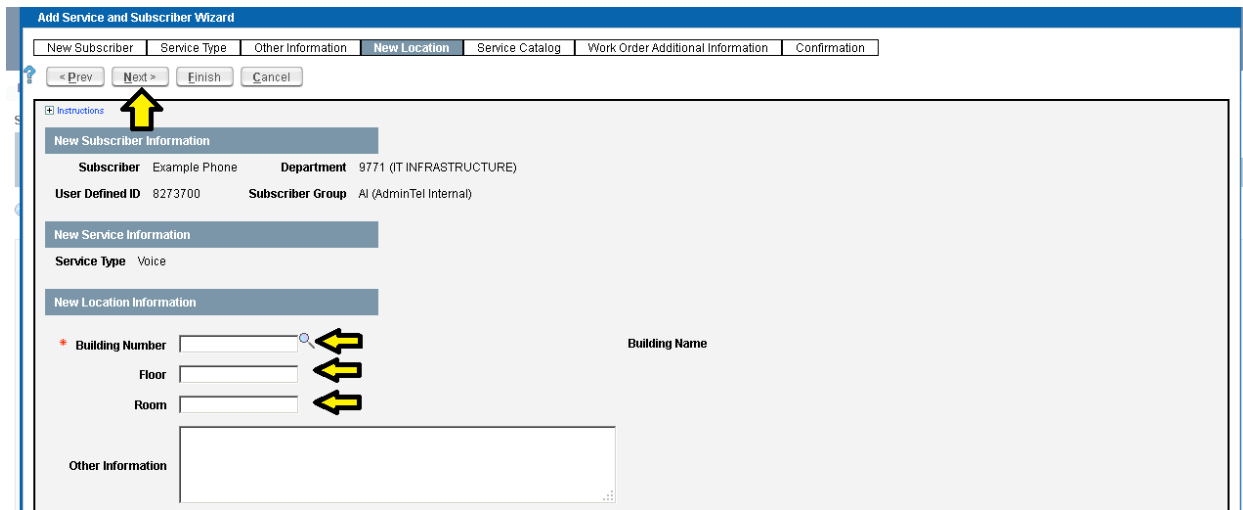
Click '**Next**'.

You will now see the following screen:

You will need to:

1. Enter the '**Request Date**' – the ideal date you wish the service to be active (actual completion date depends on complexity of request and current volume of requests).
2. Describe the request in the '**Additional information and/or contacts**' box, including a brief description of the jack location in the room if it is for a new phone line, and **also include the email address you wish to be contacted** at. If you are also adding a Voice Mail box, please also include the user's email address in this section. Describing the request in this box helps to speed up the process for the Voice Team.
3. Fill in your contact information (not the subscribers) if it is not already filled in automatically in the '**Contact**' section.
4. Click '**Next**'.

You will now see this screen:

You will need to:

1. Enter the '**Building Number**'. If you do not know the building number, you can click on the 'magnifier' to the right of the text box to look up the building number. Once you have entered the building number, the building name will be automatically filled in.
2. Enter the '**Floor**' number, for example '3'.
3. Enter the '**Room**' number. If the room does not have a number, enter the name, for example 'Lobby'.
4. Click '**Next**'.

You will now see this screen:

In order to view all the service catalog selections, go to the box under 'Service Catalog Selections that says 'Display xxx rows per page' and change the xxx (by default set to 15) to 250, and click on a blank part of the page to refresh the screen.

1. If you wish to order:
   a. A new Basic Service for a regular UBC employee, place a check in the box next to '**Internal: Employee Basic Service**'.
   b. A new Enhanced Service for a regular UBC employee, place a check in the box next to '**Internal: Employee Enhanced Service**'.
   c. A new Multiline Service for a regular UBC employee, place a check in the box next to '**Internal: Employee Multiline Service**'.
   d. A new Jack Only Service for a regular UBC employee (for someone using their own phone set), place a check in the box next to '**Internal: Employee Jack Only Service**'.
   e. A new fax, modem, elevator, alarm, or other similar service, place a check next to '**Internal: Other Jack Only Service**'.
   f. A new Long Distance Authorization Code (aka PBN), place a check next to '**Internal: New PBN**'.
   g. A new line for a non-employee, such as contractors, conference/meeting rooms, classrooms, etc., select one of the '**Internal: Other Basic/Enhanced/Multiline/Jack Only Service**' offerings as appropriate.
2. If you wish to add Voice Mail to the new service, also put a check in the box next to '**Internal: Exchange Voice Mail**'.
3. You can **find more information about service offerings** at the UBC IT AdminTel website. http://www.it.ubc.ca/service_catalogue/internet_telephone/facultystaffphoneservice/admintel/cost_admintel.html
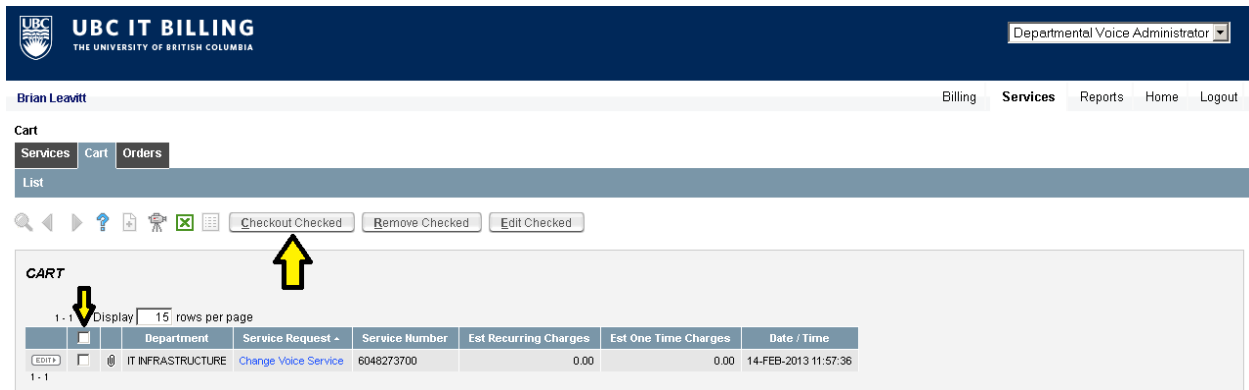4. Click '**Next**' at the top of the screen.

You will now see this screen:

- New services require **Speedchart** information for billing. Please fill in (**all entries are required**):
    - o '**MRC Speedchart**' – Recurring charges
    - o '**OCC Speedchart**' – One time charges
    - o '**Long Dist Y/N?**' – Should outgoing long distance be allowed, Y/N?
    - o '**Toll Speedchart**' – Long distance charges
    - o '**Email Address**' – The subscribers email address, if there is not one, use your own
    - o '**CWL Login**' – This is pending future implementation, please leave blank for now.
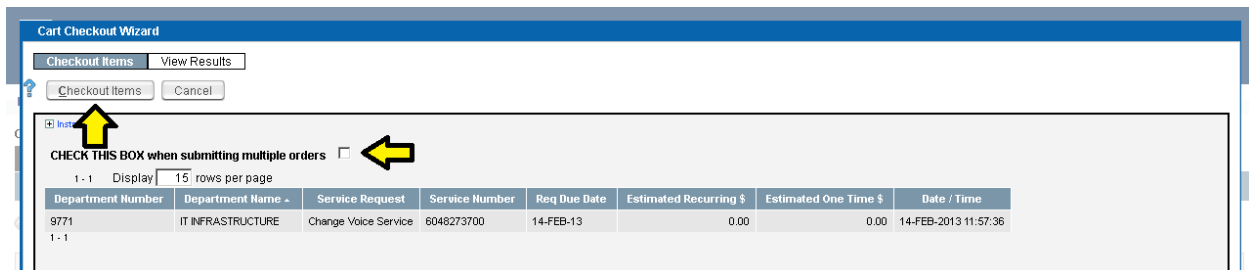
- Click '**Next**'.

- You will now see a page summarizing all the information you have entered. Please look it over and then click '**Finish**'.
- If there are no errors, you will be taken back to the '**Services**' page.
- If you have more orders to place, click on click on 'Add Subscriber And Service' or search for the next service you wish to change. If you are done submitting orders, **click on 'Cart'** at the top of the screen.

You will now see this screen:

1. **Place a check** in the box next to each order you wish to submit.
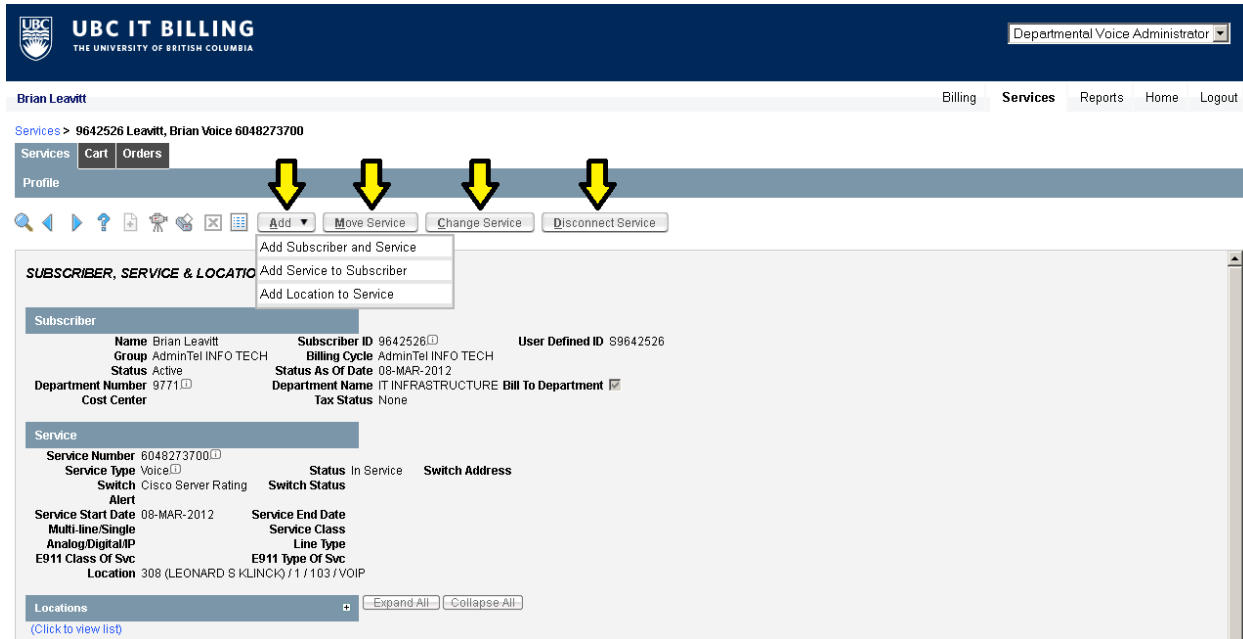2. **Click 'Checkout Checked'.**

You will now see this screen:

1. If you have more than one order to submit, **place a check in the box next to 'CHECK THIS BOX when submitting multiple orders'**.
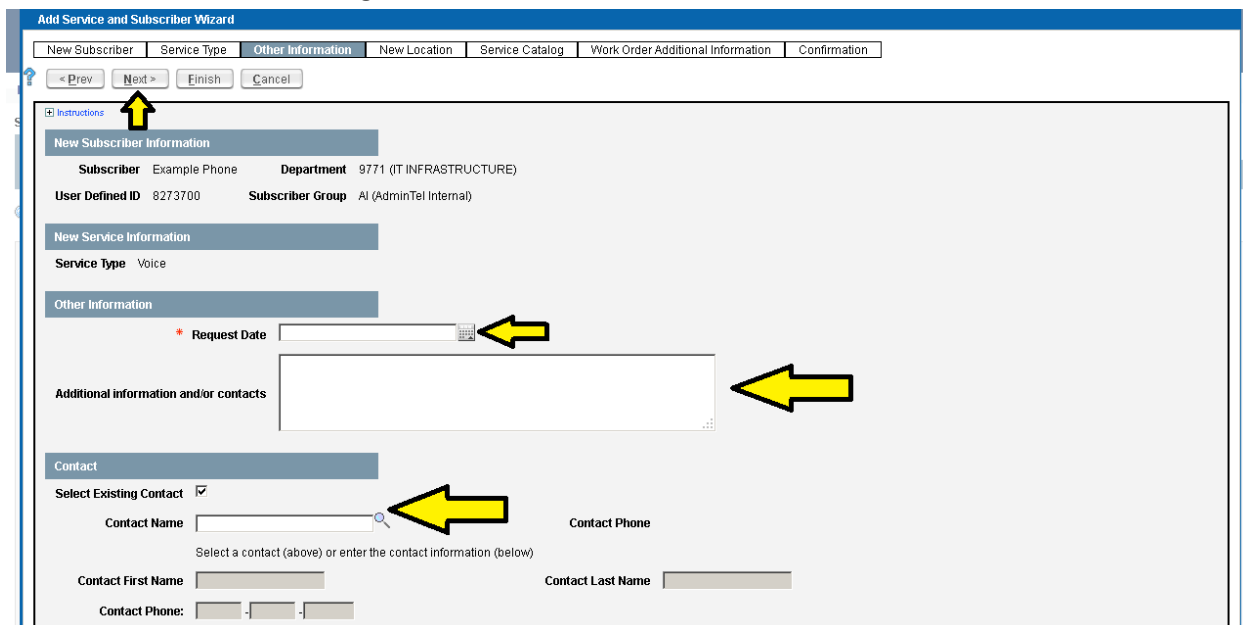2. **Click on 'Checkout Items'**.

Congratulations, you are done! – Click here to go back to Placing Phone Orders.

Add an Extension to an Existing Line

From this screen: **click on 'Add'** and then a new menu will open, from there **click on 'Add Location to Service'**.

You will now see the following screen:

You will need to:

1. Enter the '**Request Date**' – the ideal date you wish the service to be active (actual completion date depends on complexity of request and current volume of requests).

2. Describe the request in the '**Additional information and/or contacts**' box, including a brief description of the jack location in the room if it is for a new phone line, and **also include the email address you wish to be contacted** at. Describing the request in this box helps to speed up the process for the Voice Team.

3. Fill in your contact information (not the subscribers) if it is not already filled in automatically in the '**Contact**' section.

4. Click '**Next**'.

You will now see this screen:

You will need to enter the location for the new phone set. **Please note: the new location must be within the same building and on the same floor**. This is to ensure the 911 location service works correctly.

1. Enter the '**Building Number**'. The building number will be the same as the current location, so you can check it by looking at the 'Location' information under 'Service Information'. Once you have entered the building number, the building name will be automatically filled in.

2. Enter the '**Floor**' number, for example '3'.

3. Enter the '**Room**' number. If the room does not have a number, enter the name, for example 'Lobby'.

4. In the '**Other Information**' mention what extension this is. For example, if there is only one current phone set, and this is the second, put 'E1' meaning it is the first extension. If it will be the third total phone, put 'E2', and so on.

5. Click '**Next**'.

You will now see this screen:

In order to view all the service catalog selections, go to the box under 'Service Catalog Selections that says 'Display xxx rows per page' and change the xxx (by default set to 15) to 250, and click on a blank part of the page to refresh the screen.

- To add a location (extension) to an existing service, place a check in the box next to: '**Internal: Add an Additional Location**'.
- Click '**Next**' at the top of the screen.

You will now see this screen:

- New locations require **Speedchart** information for billing. Please fill in (**all entries are required**):
  - o '**MRC Speedchart**' – Recurring charges
  - o '**OCC Speedchart**' – One time charges
  - o '**Long Dist Y/N?**' – Should outgoing long distance be allowed, Y/N? Note – must be the same as the main line
  - o '**Toll Speedchart**' – Long distance charges
  - o '**Email Address**' – The subscribers email address, if there is not one, use your own
  - o '**CWL Login**' – This is pending future implementation, please leave blank for now.
- Click '**Next**'.

- You will now see a page summarizing all the information you have entered. Please look it over and then click '**Finish**'.
- If there are no errors, you will be taken back to the '**Services**' page.
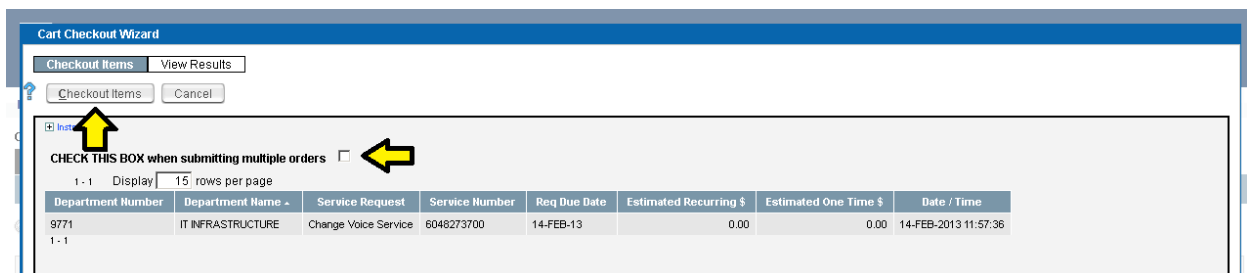- If you have more orders to place, click on click on 'Add Subscriber And Service' or search for the next service you wish to change. If you are done submitting orders, **click on 'Cart'** at the top of the screen.

You will now see this screen:

1. **Place a check** in the box next to each order you wish to submit.
2. **Click 'Checkout Checked'.**

You will now see this screen:

1. If you have more than one order to submit, **place a check in the box next to 'CHECK THIS BOX when submitting multiple orders'**.
2. **Click on 'Checkout Items'**.

Congratulations, you are done! – Click here to go back to Placing Phone Orders.

Change a subscriber and call display (caller ID) name
Change Speedchart (billing) information for a service
Disable long distance
Enable long distance
Remove voicemail

From this screen: **click on 'Change Service'**.

You will now see this screen:

You will need to:

1. Enter the '**Request Date**' – the ideal date you wish the change to occur (actual completion date depends on complexity of request and current volume of requests).
2. **Describe the request** in the '**Additional information and/or contacts**' box, and also **include the email address you wish to be contacted at**. Describing the request in this box helps to speed up the process for the Voice Team.
   a. If you are updating a name, be sure to include the new name here.
   b. If you are updating a Speedchart, be sure to include it here.
3. Fill in your contact information (not the subscribers) if it is not already filled in automatically in the '**Contact**' section.
4. Click '**Next**'.

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You will now see this screen:

In order to view all the service catalog selections, go to the box under 'Service Catalog Selections that says 'Display xxx rows per page' and change the xxx (by default set to 15) to 250, and click on a blank part of the page to refresh the screen.

1. Place a check in the box next to:
   a. '**Internal: Update Subscriber Name**' to change the subscriber and call display (caller ID) name. Note: you should have entered the name you wish to change it to in the '**Additional information and/or contacts**' box in the previous step.
   b. '**Internal: Update Speedchart Information**' to change the Speedchart (billing) information.
   c. '**Internal: Long Distance Allowed**' to enable long distance calling.
   d. '**Internal: Long Distance Denied**' to disable long distance calling.
   e. '**Internal: Voice Mail – Remove Voice Mail**' to remove a Voice Mail box. Please note: this will delete all messages currently in the Voice Mail box.
2. Click '**Finish**' at the top of the screen.
3. If there are no errors, you will be taken back to the subscriber information page.
4. If you have more orders to place, click on '**Services**' and search for the next service you wish to change. If you are done submitting orders, **click on 'Cart'** at the top of the screen.

You will now see this screen:

1. **Place a check** in the box next to each order you wish to submit.
2. **Click 'Checkout Checked'.**

You will now see this screen:

1. If you have more than one order to submit, **place a check in the box next to 'CHECK THIS BOX when submitting multiple orders'**.
2. **Click on 'Checkout Items'**.

Congratulations, you are done! – Click here to go back to Placing Phone Orders.

Disconnect a Service

From this screen: **click on 'Disconnect Service'**.

You will now see this screen:

You will need to:

1. Enter the '**Request Date**' – the date you wish the service to be disconnected on (actual completion date depends on complexity of request and current volume of requests).

2. **Describe the request** in the '**Additional information and/or contacts**' box, and also **include the email address you wish to be contacted at**. Describing the request in this box helps to speed up the process for the Voice Team.
3. Fill in your contact information (not the subscribers) if it is not already filled in automatically in the '**Contact**' section.
4. Click '**Next**'.

You will now see this screen:

In order to view all the service catalog selections, go to the box under 'Service Catalog Selections that says 'Display xxx rows per page' and change the xxx (by default set to 15) to 250, and click on a blank part of the page to refresh the screen.

1. Place a check in the box next to:
    a. '**Internal: Disconnect Additional Location**' to disconnect an extension.
    b. '**Internal: Disconnect Voice Service**' to disconnect a phone service.
2. Click '**Finish**' at the top of the screen.
3. If there are no errors, you will be taken back to the subscriber information page.
4. If you have more orders to place, click on '**Services**' and search for the next service you wish to change. If you are done submitting orders, **click on 'Cart'** at the top of the screen.

You will now see this screen:

1. **Place a check** in the box next to each order you wish to submit.
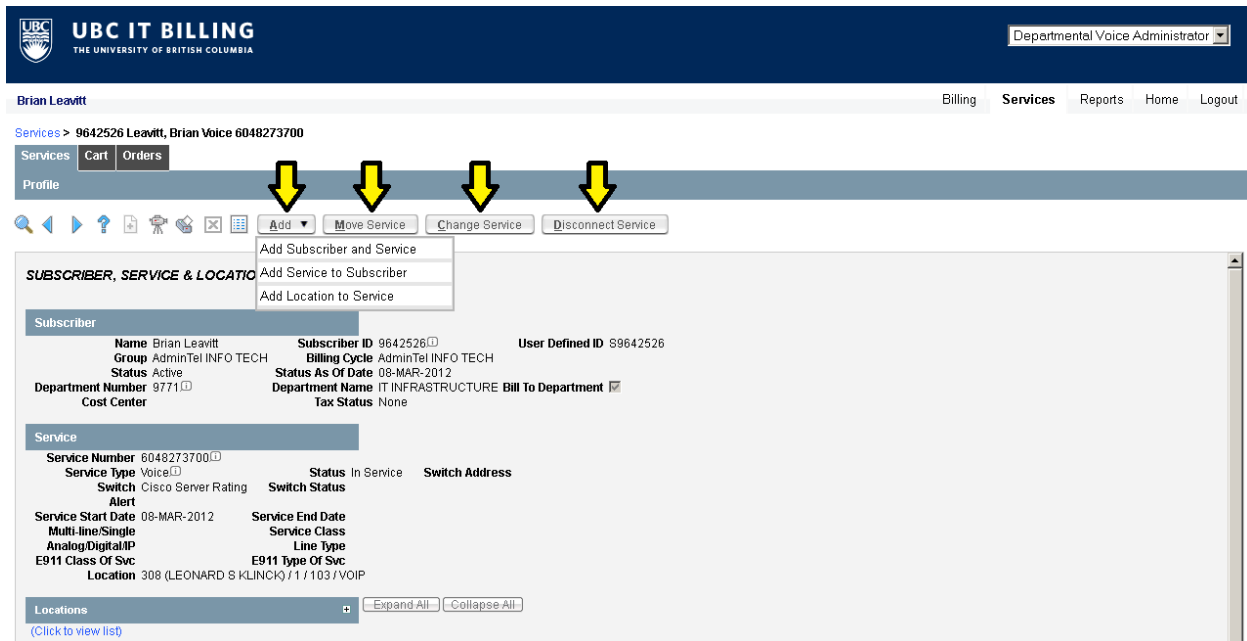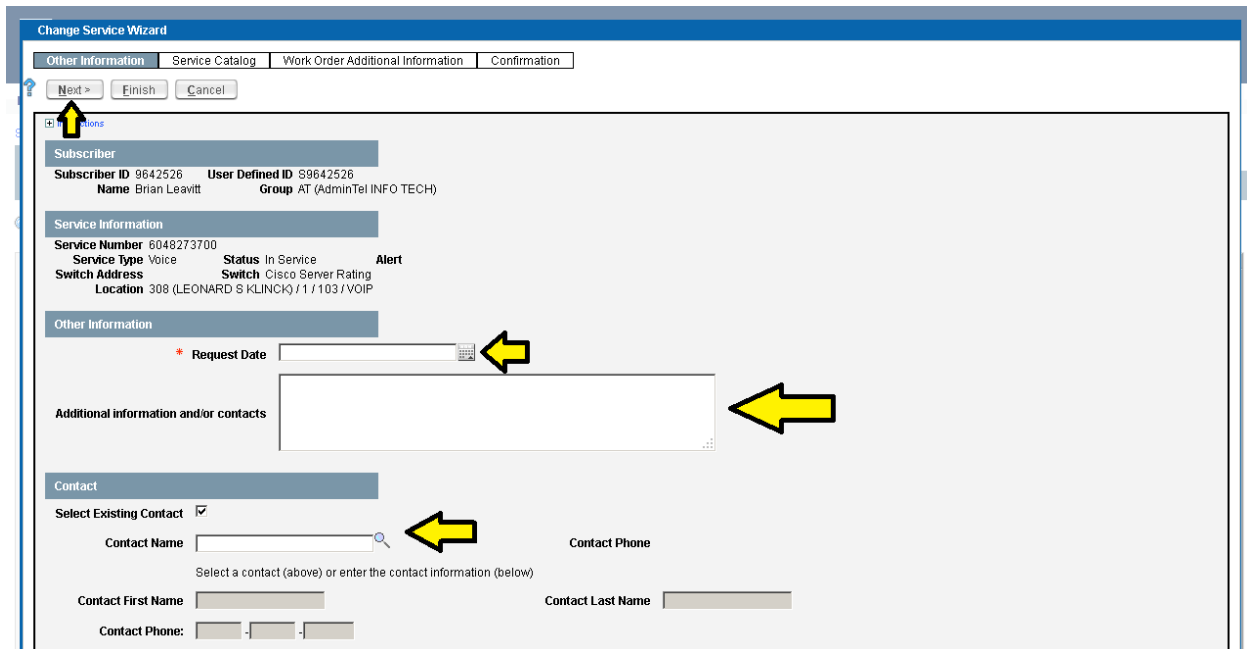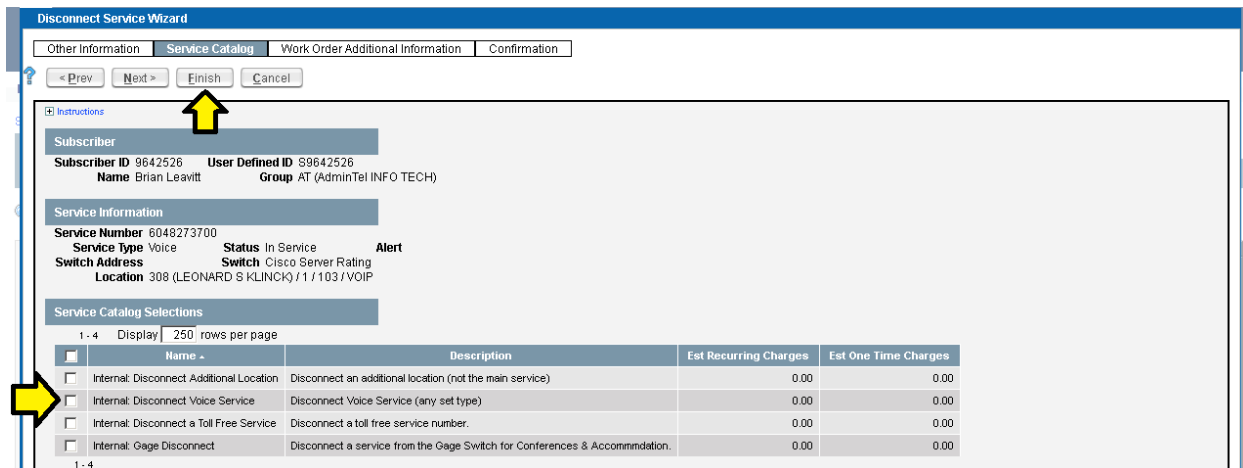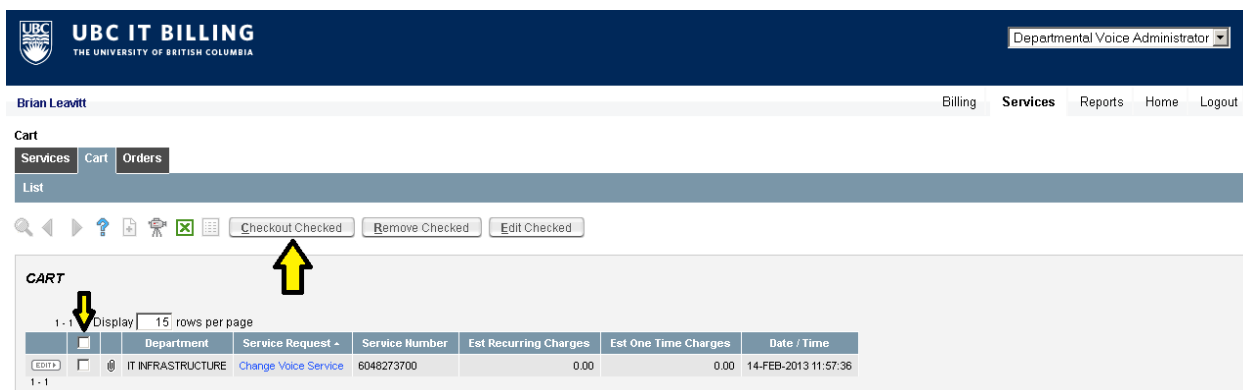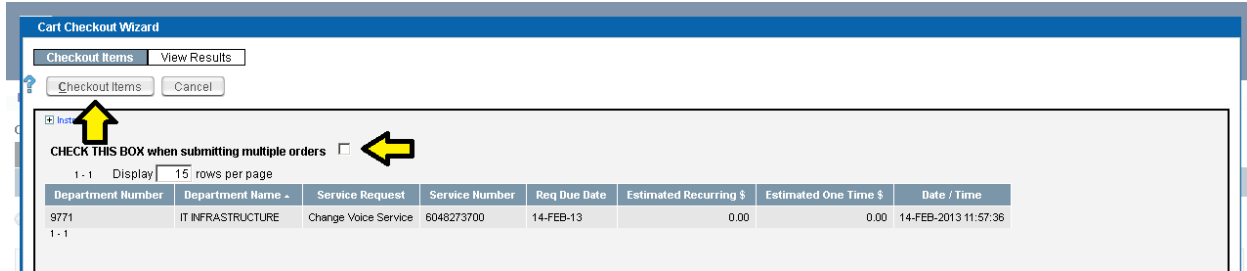2. **Click 'Checkout Checked'.**

You will now see this screen:

1. If you have more than one order to submit, **place a check in the box next to 'CHECK THIS BOX when submitting multiple orders'**.
2. **Click on 'Checkout Items'.**

Congratulations, you are done! – Click here to go back to Placing Phone Orders.
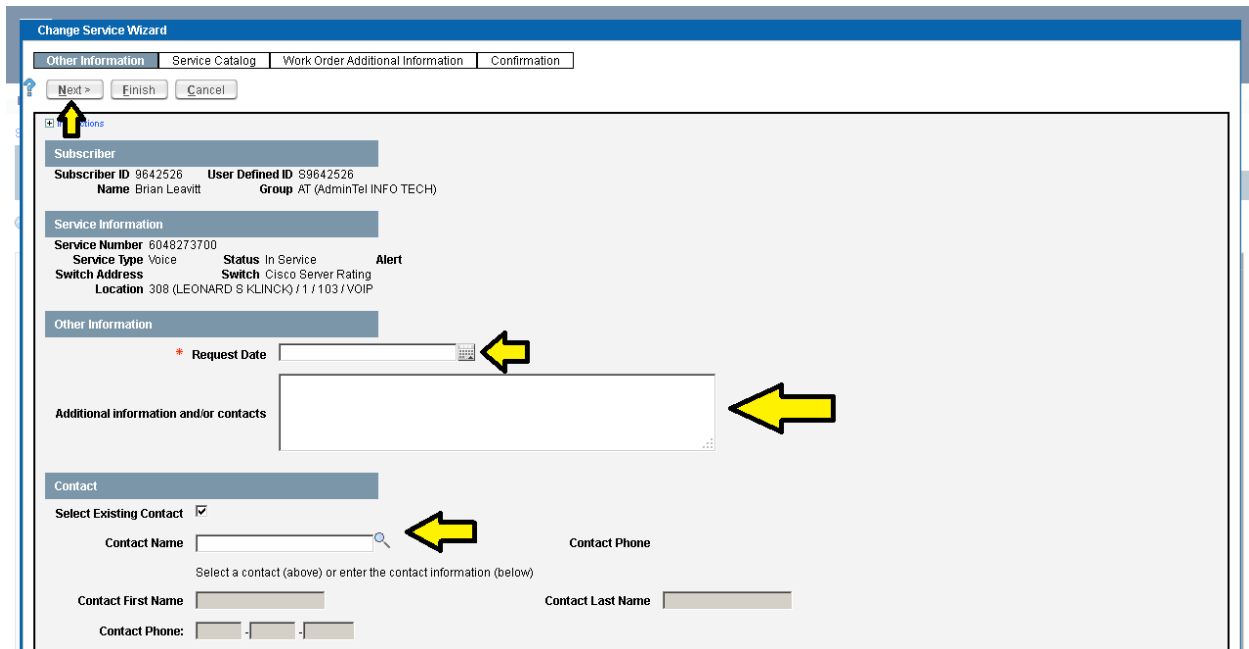
Move a Line (or Report a VoIP Phone Move)

From this screen: **click on 'Move Service'**.

You will now see this screen:

You will need to:

1. Enter the '**Request Date**' – the date you wish the service to be moved on (actual completion date depends on complexity of request and current volume of requests). If it is a VoIP phone set

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==move, you may instruct the user to move the phone themselves, however please submit the move order before they move the phone so that we are able to keep the emergency 911 location information up to date==.

2.   **Describe the request** in the '**Additional information and/or contacts**' box, for example where the phone is currently, and where it is moving to, and also **include the email address you wish to be contacted at**. Describing the request in this box helps to speed up the process for the Voice Team.

3.   Fill in your contact information (not the subscribers) if it is not already filled in automatically in the '**Contact**' section.

4.   Click '**Next**'.

You will now see this screen:

You will need to enter the new location where the phone set is to be moved.

1.   Enter the '**Building Number**'. If you do not know the building number, you can click on the 'magnifier' to the right of the text box to look up the building number. Once you have entered the building number, the building name will be automatically filled in.

2.   Enter the '**Floor**' number, for example '3'.

3.   Enter the '**Room**' number. If the room does not have a number, enter the name, for example 'Lobby'.

Click '**Next**'.

You will now see this screen:

In order to view all the service catalog selections, go to the box under 'Service Catalog Selections that says 'Display xxx rows per page' and change the xxx (by default set to 15) to 250, and click on a blank part of the page to refresh the screen.

1. Place a check in the box next to:
   a. '**Internal: Move Jack Only or Single Line Service**' to move a jack only or single line service.
   b. '**Internal: Move Multiline Service**' to move a multiline phone service.
   c. '**Internal: Move VOIP Phone Service**' to report a VoIP phone set move.
2. Click '**Finish**' at the top of the screen.
3. If there are no errors, you will be taken back to the subscriber information page.
4. If you have more orders to place, click on '**Services**' and search for the next service you wish to change. If you are done submitting orders, **click on 'Cart'** at the top of the screen.

You will now see this screen:

3. **Place a check** in the box next to each order you wish to submit.

4. **Click 'Checkout Checked'.**

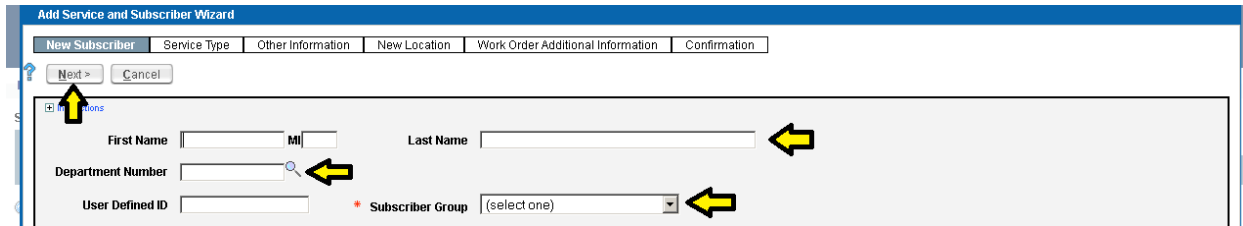You will now see this screen:

3. If you have more than one order to submit, **place a check in the box next to 'CHECK THIS BOX when submitting multiple orders'**.
4. **Click on 'Checkout Items'**.

Congratulations, you are done! **– Click here to go back to Placing Phone Orders.**
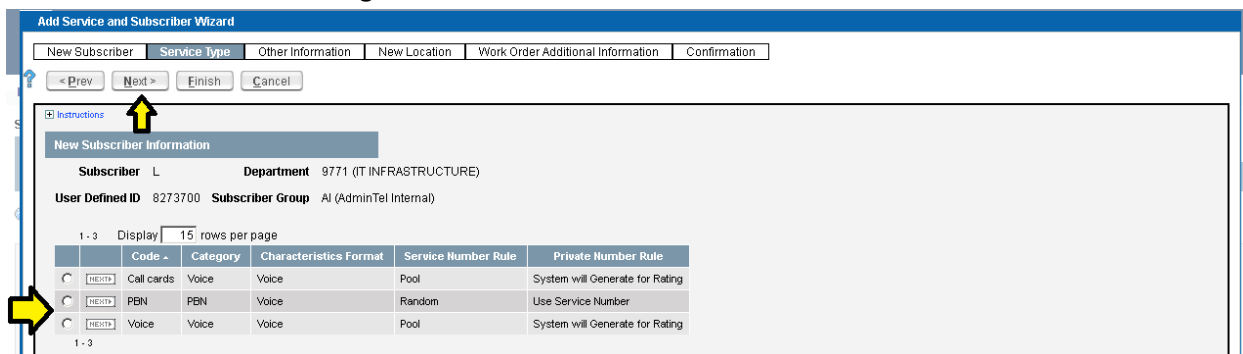
Part 2b: Order a New Service for a New Subscriber

If you wish to **add a new service AND a new subscriber**, for example a new employee in a new position, **click on 'Add Subscriber And Service'** at the top of the '**Services**' page. After you have clicked on the button, the following screen will appear:

1. Fill out the fields on the screen. The **required** fields are:
    a. Last Name
    b. Department Number (You can search for the department number by clicking on the 'magnifier' icon to the right of the 'Department Number' box
    c. Subscriber Group (For regular UBC employees it is 'AI – AdminTel Internal')
2. First Name is optional. Note that the combination of First Name and Last Name will be the Caller Display (call id)
3. User Defined ID is optional and may be left blank, we recommend using the 7 digit phone number, for example 8273700 if the number is 604.827.3700
4. Click '**Next**'.

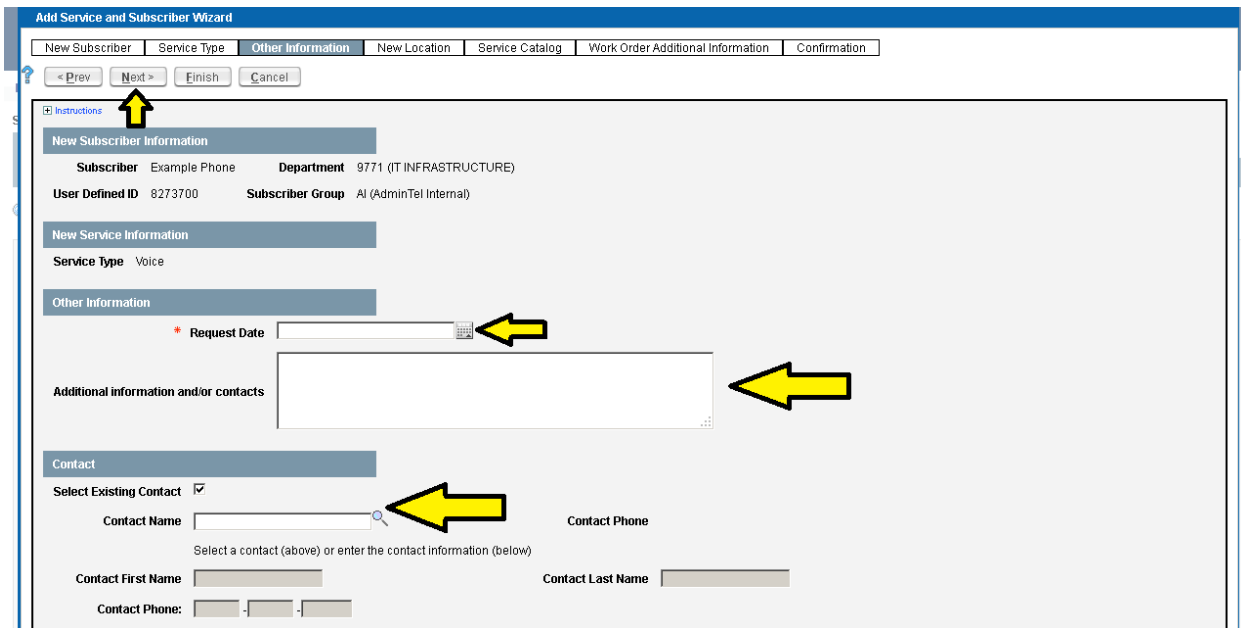You will now see the following screen:

- If you are adding a new phone service, put a check in circle to the left of '**Voice**'.
- If you are adding a Long Distance Authorization Code (aka PBN), put a check in the circle to the left of '**PBN**'.

Click '**Next**'.

You will now see the following screen:

You will need to:

1. Enter the '**Request Date**' – the ideal date you wish the service to be active (actual completion date depends on complexity of request and current volume of requests).
2. Describe the request in the '**Additional information and/or contacts**' box, including a brief description of the jack location in the room if it is for a new phone line, and **also include the email address you wish to be contacted** at. If you are also adding a Voice Mail box to the new service, please also include the user's email address in this section. Describing the request in this box helps to speed up the process for the Voice Team.
3. Fill in your contact information (not the subscribers) if it is not already filled in automatically in the '**Contact**' section.
4. Click '**Next**'.

You will now see this screen:

You will need to:

1. Enter the '**Building Number**'. If you do not know the building number, you can click on the 'magnifier' to the right of the text box to look up the building number. Once you have entered the building number, the building name will be automatically filled in.
2. Enter the '**Floor**' number, for example '3'.
3. Enter the '**Room**' number. If the room does not have a number, enter the name, for example 'Lobby'.
4. Click '**Next**'.

You will now see this screen:

In order to view all the service catalog selections, go to the box under 'Service Catalog Selections that says 'Display xxx rows per page' and change the xxx (by default set to 15) to 250, and click on a blank part of the page to refresh the screen.

1. If you wish to order:
    a. A new Basic Service for a regular UBC employee, place a check in the box next to '**Internal: Employee Basic Service**'.
    b. A new Enhanced Service for a regular UBC employee, place a check in the box next to '**Internal: Employee Enhanced Service**'.
    c. A new Multiline Service for a regular UBC employee, place a check in the box next to '**Internal: Employee Multiline Service**'.
    d. A new Jack Only Service for a regular UBC employee (for someone using their own phone set), place a check in the box next to '**Internal: Employee Jack Only Service**'.
    e. A new fax, modem, elevator, alarm, or other similar service, place a check next to '**Internal: Other Jack Only Service**'.
    f. A new Long Distance Authorization Code (aka PBN), place a check next to '**Internal: New PBN**'.
    g. A new line for a non-employee, such as contractors, conference/meeting rooms, classrooms, etc., select one of the '**Internal: Other Basic/Enhanced/Multiline/Jack Only Service**' offerings as appropriate.
2. If you wish to add Voice Mail to the new service, also put a check in the box next to '**Internal: Exchange Voice Mail**'.
3. You can **find more information about service offerings** at the UBC IT AdminTel website. http://www.it.ubc.ca/service_catalogue/internet_telephone/facultystaffphoneservice/admintel/cost_admintel.html
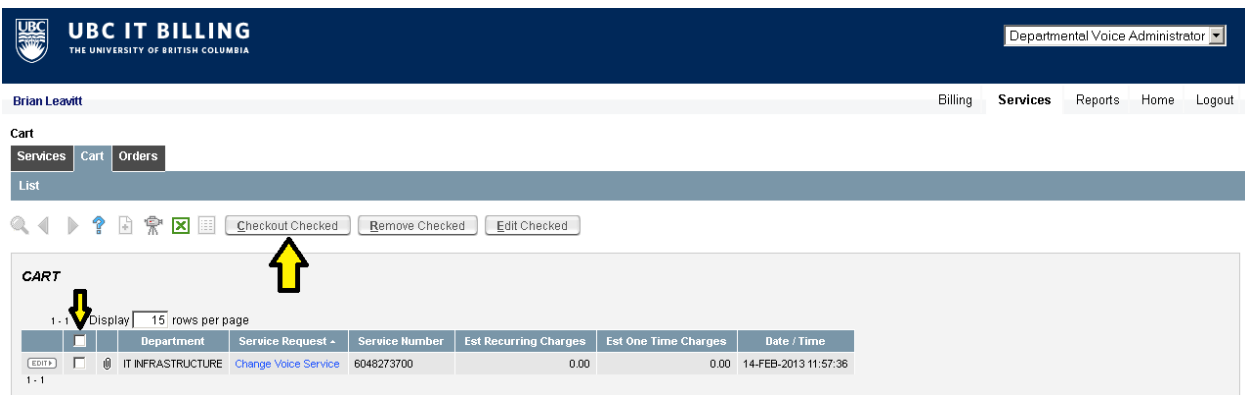4. Click '**Next**' at the top of the screen.
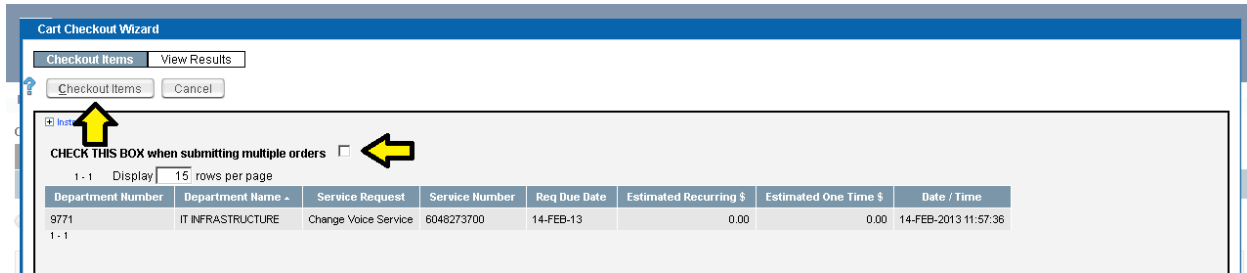
You will now see this screen:

- New services require **Speedchart** information for billing. Please fill in (**all entries are required**):
  - ○ '**MRC Speedchart**' – Recurring charges
  - ○ '**OCC Speedchart**' – One time charges
  - ○ '**Long Dist Y/N?**' – Should outgoing long distance be allowed, Y/N?
  - ○ '**Toll Speedchart**' – Long distance charges
  - ○ '**Email Address**' – The subscribers email address, if there is not one, use your own
  - ○ '**CWL Login**' – This is pending future implementation, please leave blank for now.
- Click '**Next**'.
- You will now see a page summarizing all the information you have entered. Please look it over and then click '**Finish**'.
- If there are no errors, you will be taken back to the '**Services**' page.
- If you have more orders to place, click on click on 'Add Subscriber And Service' or search for the next service you wish to change. If you are done submitting orders, **click on 'Cart'** at the top of the screen.

You will now see this screen:

1. **Place a check** in the box next to each order you wish to submit.
2. **Click 'Checkout Checked'.**

You will now see this screen:

Cart Checkout Wizard

Checkout Items | View Results

Checkout Items | Cancel

CHECK THIS BOX when submitting multiple orders ☐

1 - 1   Display [15] rows per page

Department Number	Department Name ▲	Service Request	Service Number	Req Due Date	Estimated Recurring $	Estimated One Time $	Date / Time
9771	IT INFRASTRUCTURE	Change Voice Service	6048273700	14-FEB-13	0.00	0.00	14-FEB-2013 11:57:36

1 - 1

1. If you have more than one order to submit, **place a check in the box next to 'CHECK THIS BOX when submitting multiple orders'**.
2. **Click on 'Checkout Items'**.

Congratulations, you are done! – Click here to go back to Placing Phone Orders.