

Departmental Monthly Billing Reporting Guide

This guide will provide step-by-step instructions for retrieving Departmental Billing information from the new on-line Billing System.

It is important to understand the terminology within the application therefore a list of definitions are as follows:

Non-Usage : Equipment rentals and One-time charges

Usage : Long Distance charges

Toll : North America calling area

Overseas : International calling area

Service Number: Extension number or Call Code number

Throughout this guide you will see functionality provided by Interactive Reporting.

Interactive Reporting is used to manipulate data to suit your needs. We will only touch upon a few items of functionality that will enable you to gather basic information relevant to a Monthly Department Bill.

If you wish to delve into more thorough aspects of Interactive Reporting, we can provide you with a guide, provided by our product supplier, in which you can self-study.

[The Voice Services staff has not received any training beyond what is presented in this guide]

Expense accounts will look different than previously shown. These Expense Account numbers come directly from Banner Finance. The new format is:

100000-555-1400-5555

Fund: **100000**

Org: **555**

Program:**1400**

Activity [if applicable]: **5555**

The Account number is shown within the reports as the **Subcode**:

712000 & 713000 [example]

Monthly Rental Charges are now **Pro-Rated**. If there was an install in the middle of the month you will only be charged from the date the service was installed

A Summary Subscriber is created for each department. All generic equipment charges [fax machine & Interac line, main lines, courtesy phones, lab phone] will be charged directly to the department through the Summary Subscriber as they are not associated with a specific user. The **Summary Subscriber** will show with a user name of the department acronym.

Subscriber ID	Name	Subscriber Group
2088133	CCS/TEL	Summary Subscriber
4334071	Kimmel, Les A	Campus
4490399	Lefebvre, Richard	Campus

The Sections in this Guide are as follows:

Non-Usage [equipment rentals & one-time charges]

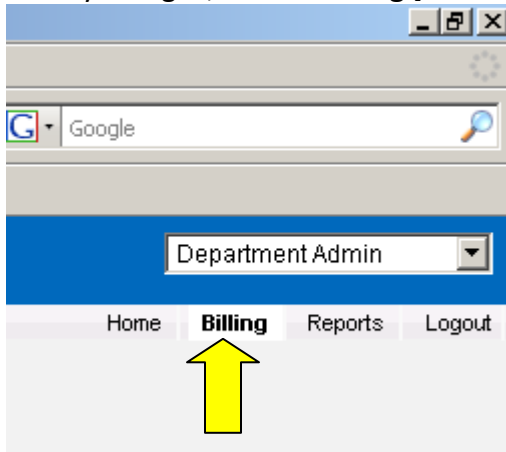
Usage [long distance]

Summary of Departmental Account Charges

Individual Billing

Miscellaneous [Recurring & One-Time Charges tabs, Multi-Department Reports]

Once you log in, choose **Billing** [located in the upper right hand corner]



Click **Search**.

Then choose the bill you want to view by clicking on the blue colored **Billing Date**.

[You will be able to view previous months]

A screenshot of the 'Department Billing' interface. The page title is 'Department Billing'. There are three tabs: 'Department Billing' (selected), 'Recurring Charges', and 'One Time Charges'. Below the tabs is a 'List' section with a search bar and a 'Create Multi-Department BillRepo' button. The main content area is titled 'DEPARTMENT BILLING' and contains a 'QuickSearch' section with 'Billing Date' and 'Banner Department' dropdowns. Below this is a table with columns: 'Billing Date', 'Banner Department', and 'Department Name'. The first row in the table has a blue background for the 'Billing Date' cell, which contains the text '28-FEB-2010'. A yellow arrow points to this cell from below.

Billing Date	Banner Department	Department Name
28-FEB-2010	CCS	Computing & Communication Services

Non-Usage

Go to: **Department Billing**> [your department bill for current month]>**Non-Usage Charges**

Non-Usage refers to all the Equipment rentals and One-Time charges.

Click on **Search** if no data shows when you go to the **Non-Usage** tab.

This displays many columns of information.

We recommend that you run a report from the **Interactive Reporting** icon to filter out unnecessary information.

Click **Interactive Reporting** icon [multi-colored box]

NON-USAGE CHARGES Saved Search All (preferred) Manage | Save

Billing Date 28-FEB-2019 Department CCS/TEL Department Name CCS: Telephones

Quick Search

Charge Category (all) Service Number

Expense Account

Subscriber ID First Name MI Last Name

1 - 161 Display 250 per page

Charge Category	Charge Code	Description	Amount	Quantity	Total	Service Number	Location	Subscriber ID	Name	Work Order	Bill Note	Expense Account
Recurring Charges	LINE_0	ONS	10.04	1	10.04	0594		2088133	CCS/TEL			100000-555-1400
Recurring Charges	LINE_0	ONS	10.04	1	10.04	0595		2088133	CCS/TEL			100000-555-1400
Recurring Charges	LINE_0	ONS	10.04	1	10.04	0596		2088133	CCS/TEL			100000-555-1400
Recurring Charges	ANAL_0_2554	2554	0.52	1	0.52	0720		2088133	CCS/TEL			100000-555-1400
Recurring Charges	LINE_ONS	ONS	10.04	1	10.04	0720		2088133	CCS/TEL			100000-555-1400

Click on the **GEAR** icon for a drop down list.
Choose **Select Columns**.

BILLHIST CHARGE

Instructions

Rows 15 Go

1 - 15

ITEM DESCRIPTION	TOTAL AMOUNT	SERVICE NUMBER	LIST
2500	.52	1539	0-555-1400
2554	.52	0720	0-555-1400
2554	.52	0721	0-555-1400
2554	.52	1194	0-555-1400
2554	.52	2121	0-555-1400
2554	1.04	1359	0-555-1400
2554	.52	1258	0-555-1400
2554	.52	1151	0-555-1400
2554	.52	8482	0-555-1400
2554	.52	1691	0-555-1400
2554	.52	1688	0-555-1400
2554	.52	1673	0-555-1400
2554	.52	1659	0-555-1400
2554	.52	1324	0-555-1400
2554	.52	1238	0-555-1400

1 - 15

- Select Columns
- Filter
- Sort
- Control Break
- Highlight
- Compute
- Aggregate
- Chart
- Save Report
- Reset
- Help
- Download

We recommend that you choose the columns to Display in Report as shown in the snapshot, as these are columns that are relevant to what you are trying to accomplish. Use the **arrow** keys to move items between boxes or you can double click the item to move it to the other box.

Once chosen, click **Apply**

BILLHIST CHARGE

Instructions

Rows 15 Go

Select Columns

Do Not Display

- CHARGE_CATEGORY_CODE
- CHARGE_CODE
- CHARGE_AMOUNT
- QUANTITY
- DISPLAY_LOCATION
- SUBSCRIBER_ID
- WORK_ORDER
- BILL_NOTE

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Display in Report

- ITEM_DESCRIPTION
- TOTAL_AMOUNT
- SERVICE_NUMBER
- LIST_DISPLAY_NAME
- EXPENSE_ACCOUNT_NUMBER

Cancel Apply

1 - 15

ITEM DESCRIPTION	TOTAL AMOUNT	SERVICE NUMBER	LIST DISPLAY NAME	EXPENSE ACCOUNT NUMBER
2500	.52	1539	CCS/TEL	100000-555-1400
2554	.52	0720	CCS/TEL	100000-555-1400

Just the columns you selected will be displayed.

BILLHIST CHARGE

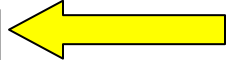
[+ Instructions](#)

Rows

1 - 15

ITEM DESCRIPTION	TOTAL AMOUNT	SERVICE NUMBER	LIST DISPLAY NAME	EXPENSE ACCOUNT NUMBER
2500	.52	1539	CCS/TEL	100000-555-1400
2554	.52	0720	CCS/TEL	100000-555-1400
2554	.52	0721	CCS/TEL	100000-555-1400
2554	.52	1194	CCS/TEL	100000-555-1400
2554	.52	2121	CCS/TEL	100000-555-1400
2554	1.04	1359	CCS/TEL	100000-555-1400
2554	.52	1258	CCS/TEL	100000-555-1400
2554	.52	1151	CCS/TEL	100000-555-1400
2554	.52	8482	CCS/TEL	100000-555-1400
2554	.52	1691	CCS/TEL	100000-555-1400
2554	.52	1688	CCS/TEL	100000-555-1400
2554	.52	1673	CCS/TEL	100000-555-1400
2554	.52	1659	CCS/TEL	100000-555-1400
2554	.52	1324	CCS/TEL	100000-555-1400
2554	.52	1238	CCS/TEL	100000-555-1400

1 - 15



Choose the **GEAR** icon again and this time choose **Save Report**.
Give your report a name [eg. equipment rentals, phone charges] and click **Apply**.

The screenshot shows a report titled "BILLHIST CHARGE" with a table of data. The table has columns for ITEM DESCRIPTION, TOTAL AMOUNT, SERVICE NUMBER, and LIST NUMBER. A yellow arrow points to the gear icon in the top right corner of the report area. A dropdown menu is open, showing various options: Select Columns, Filter, Sort, Control Break, Highlight, Compute, Aggregate, Chart, Save Report (highlighted with a yellow arrow), Reset, Help, and Download.

ITEM DESCRIPTION	TOTAL AMOUNT	SERVICE NUMBER	LIST NUMBER
2554	.52	1069	00-555-1400
2554	.52	1142	00-555-1400
2554	.52	1400	00-555-1400
2554	.52	2021	00-555-1400
2554	.52	1201	00-555-1400
2554	.52	4291	00-555-1400
2554	.52	8242	00-555-1400
2554	.52	4295	00-555-1400
470	4	3728	00-555-1400
470	4	1338	00-555-1400
470	4	8932	00-555-1400
470	4	2506	00-555-1400
470	4	3129	00-555-1400
470	4	8348	00-555-1400
470	4	5564	00-555-1400

Now that the report is saved, it can be used **each** time you are creating reports by just choosing the **Saved Report**.

BILLHIST CHARGE

[+ Instructions](#)

Rows

Working Report **Equipment**

Saved Report = "Equipment" Filtered Report

1 - 15

ITEM DESCRIPTION	TOTAL AMOUNT	SERVICE NUMBER	LIST DISPLAY NAME	EXPENSE ACCOUNT NUMBER
2500	.52	1539	CCS/TEL	100000-555-1400
2554	.52	0720	CCS/TEL	100000-555-1400
2554	.52	0721	CCS/TEL	100000-555-1400
2554	.52	1121	CCS/TEL	100000-555-1400

Choose the **GEAR** icon once again and this time choose **Download**.

BILLHIST CHARGE

[Instructions](#)

1 - 15

Rows

ITEM DESCRIPTION	TOTAL AMOUNT	SERVICE NUMBER	LIST	T NUMBER
2500	.52	1539		0-555-1400
2554	.52	0720		0-555-1400
2554	.52	0721		0-555-1400
2554	.52	1194		0-555-1400
2554	.52	2121		0-555-1400
2554	1.04	1359		0-555-1400
2554	.52	1258		0-555-1400
2554	.52	1151		0-555-1400
2554	.52	8482		0-555-1400
2554	.52	1691		0-555-1400
2554	.52	1688		0-555-1400
2554	.52	1673		0-555-1400
2554	.52	1659		0-555-1400
2554	.52	1324		0-555-1400
2554	.52	1238		0-555-1400

1 - 15

- Select Columns
- Filter
- Sort
- Control Break
- Highlight
- Compute
- Aggregate
- Chart
- Save Report
- Reset
- Help
- Download**

The following **Download** box will appear.
Click on the **Excel** icon.

BILLHIST CHARGE

+ Instructions

Rows 15 Go

Download
Choose report download format:

Click

CSV

Cancel


1 - 15

ITEM DESCRIPTION	TOTAL AMOUNT	SERVICE NUMBER	LIST DISPLAY NAME	EXPENSE ACCOUNT NUMBER
2500	.52	1539	CCS/TEL	100000-555-1400
2554	.52	0720	CCS/TEL	100000-555-1400
2554	.52	0721	CCS/TEL	100000-555-1400
2554	.52	1194	CCS/TEL	100000-555-1400

You will be given an option to **Open** or **Save** the report.
Choose **open** to view the report or **save** to download the report to your PC.

Opening interactive_report.csv

You have chosen to open

 **interactive_report.csv**
which is a: Microsoft Office Excel Comma Separated Values File
from: <http://ccsbilling.carleton.ca>

What should Firefox do with this file?

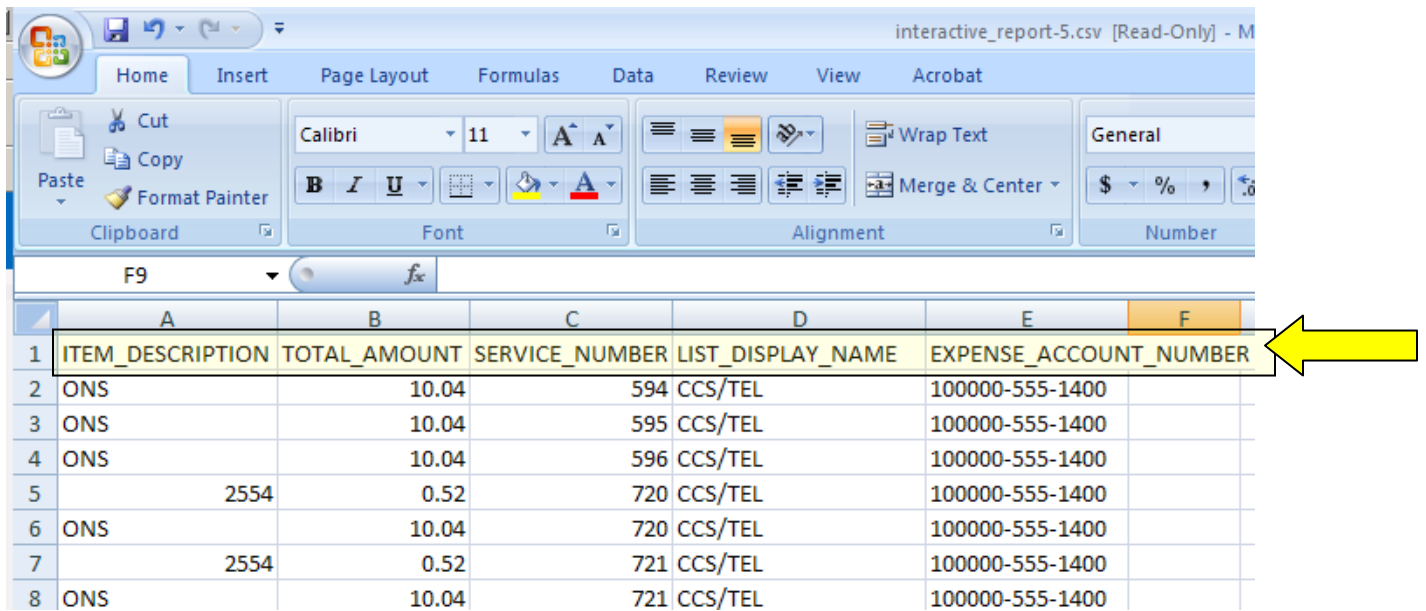
Open with: Microsoft Office Excel (default)

Save File

Do this automatically for files like this from now on.

OK Cancel

The information will be displayed in an **Excel CSV Spreadsheet** based on the columns you have chosen.

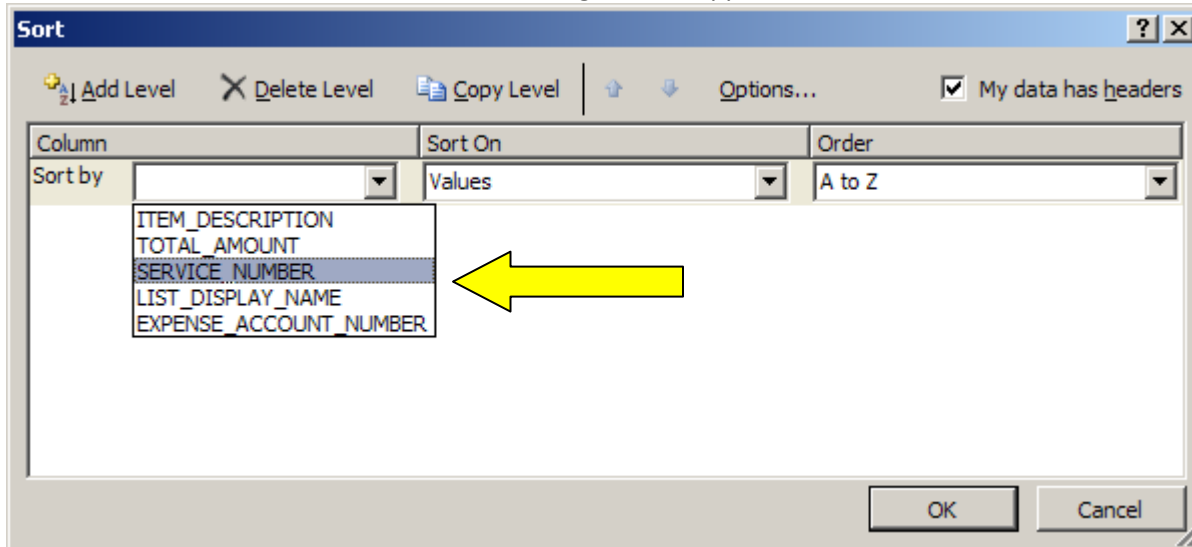


	A	B	C	D	E	F
1	ITEM_DESCRIPTION	TOTAL_AMOUNT	SERVICE_NUMBER	LIST_DISPLAY_NAME	EXPENSE_ACCOUNT_NUMBER	
2	ONS	10.04	594	CCS/TEL	100000-555-1400	
3	ONS	10.04	595	CCS/TEL	100000-555-1400	
4	ONS	10.04	596	CCS/TEL	100000-555-1400	
5	2554	0.52	720	CCS/TEL	100000-555-1400	
6	ONS	10.04	720	CCS/TEL	100000-555-1400	
7	2554	0.52	721	CCS/TEL	100000-555-1400	
8	ONS	10.04	721	CCS/TEL	100000-555-1400	

We recommend that you sort your columns by **Service Number**.

This way you will see all related charges for a specific extension number and person.

From menu choose **Data > sort** and the following box will appear. Select **service number** & click **O.K**



Sort

My data has headers

Column	Sort On	Order
Sort by	Values	A to Z

ITEM_DESCRIPTION
 TOTAL_AMOUNT
SERVICE_NUMBER
 LIST_DISPLAY_NAME
 EXPENSE_ACCOUNT_NUMBER

Usage

Go to: Department Billing > [department bill] > usage charges

Usage refers to **Long Distance**

Click on **Search** if no data shows when you go to the **Usage Charges** section.
 This displays many columns of information. We recommend filtering out the **local** calls.
 Click on the **Select** button.

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DAWNILLABAUGH Home Billing R

Department Billing > CCS Computing & Communication Services > Usage Charges ← Long Distance

Department Billing | Recurring Charges | One Time Charges

Summary | Summary By Account | Individual Bills | Non-Usage Charges | Usage Charges

Usage Subtype (all) Select Service Number

Expense Account First Name Last Name

1 - 250 (NEXT PAGE) Display 250 rows per page

Connect Date	Service Number	Units	UOM	Usage Subtype	Usage Detail	Amount Billed	Location	Subscriber ID	Name	Expense Account
03-FEB-2010 14:54:00	0492	1:52	min.	local	0492 to 613-564-0006 (OTTAWAHULL, ON)	0.00		7233789	CCS	100000-555-1400
03-FEB-2010 14:54:00	0492	0:44	min.	local	0492 to 613-564-0006 (OTTAWAHULL, ON)	0.00		7233789	CCS	100000-555-1400
03-FEB-2010 15:13:00	0492	0:44	min.	local	0492 to 613-564-0006 (OTTAWAHULL, ON)	0.00		7233789	CCS	100000-555-1400
03-FEB-2010 15:23:00	0492	2:07	min.	local	0492 to 613-225-2529 (OTTAWAHULL, ON)	0.00		7233789	CCS	100000-555-1400

Choose the types of calls you want to have visible as a default when you go to the **Usage Charges** tab.
 The recommended are: **Directory Assisted**, **Toll** (North America), **Overseas** (International). Optional are: **Toll-Free** and **Local**. To choose multiple types, hold down the **“Control”** button on your keyboard while clicking on all your choices.
 Once you have selected all your preferred usage types, click **O.K.**

DAWNILLABAUGH

Department Billing > CCS Computing & Communication Services > Usage Charges

Department Billing | Recurring Charges | One Time Charges

Summary | Summary By Account | Individual Bills | Non-Usage Charges | Usage Charges

Usage Subtype (all) Select Service Number

Expense Account

1 - 250 (NEXT PAGE) Display 250 rows per page

Connect Date	Service Number	Units	UOM	Usage Subtype	Usage Detail	Amount Billed	Location	Subscriber ID	Name	Expense Account
03-FEB-2010 14:54:00	0492	1:52	min.	Local	0492 to 613-564-0006 (OTTAWAHULL, ON)	0.00		7233789	CCS	100000-555-1400
03-FEB-2010 14:54:00	0492	0:44	min.	Local	0492 to 613-564-0006 (OTTAWAHULL, ON)	0.00		7233789	CCS	100000-555-1400
03-FEB-2010 15:13:00	0492	0:44	min.	Local	0492 to 613-564-0006 (OTTAWAHULL, ON)	0.00		7233789	CCS	100000-555-1400
03-FEB-2010 15:23:00	0492	2:07	min.	Local	0492 to 613-225-2529 (OTTAWAHULL, ON)	0.00		7233789	CCS	100000-555-1400
03-FEB-2010 15:23:00	0492	0:50	min.	Local	0492 to 613-225-2529 (OTTAWAHULL, ON)	0.00		7233789	CCS	100000-555-1400
03-FEB-2010 15:13:00	0492	10:25	min.	Local	0492 to 613-225-2529 (OTTAWAHULL, ON)	0.00		7233789	CCS	100000-555-1400
04-FEB-2010 11:12:00	0505	0:43	min.	Local	0505 to 613-225-2529 (OTTAWAHULL, ON)	0.00		7233789	CCS	100000-555-1400

Select Usage Subtype(s)

Ok O.K. Cancel

- 900 Access
- 911 Access
- Calling Card
- Cellular
- Collect Calls
- Data
- Directory Assisted
- Equal Access
- Incoming
- Incoming 800
- Information (311)
- Local
- Manual
- Multimedia Messaging Service
- Multimedia Messaging Service - Internal

We now want to save your chosen Types as a **Default Search**.
 Click on **Save**, beside the **Saved Search** drop down. It will bring up a box for you to give it a **Title & Description**.
 Click the **Make Preferred** box, and click **Save**.

DAWNILLABAUGH

Department Billing > CCS Computing & Communication Services > Usage Charges

Department Billing | Recurring Charges | One Time Charges

Summary | Summary By Account | Individual Bills | Non-Usage Charges | Usage Charges

Usage Charges

Saved Search [] Manage | Save

Billing Date 28-FEB-2010 Banner Department CCS Department Name Computing & Communication Services

Quick Search

Usage Subtype (5 values selected) Service Number

Expense Account

1 - 250 Display 250 rows per page

Connect Date	Service Number	Units	UOM	Usage Subtype	Usage Detail
03-FEB-2010 14:54:00	0492	1:52	min.	Local	0492 to
03-FEB-2010 14:54:00	0492	0:44	min.	Local	0492 to
03-FEB-2010 15:13:00	0492	0:44	min.	Local	0492 to
03-FEB-2010 15:23:00	0492	2:07	min.	Local	0492 to

Save Search dialog box:

* Title Charge Types

Description Toll, Toll-Free, Overseas, Directory Assisted

Make Preferred

Save Cancel

You will see that the data is now filtered by your selection.
 We will now create a report by **clicking the Interactive Report** icon. [multi-colored box]
 This is a multi-step process: choose columns, filters, save report and download.

DAWNILLABAUGH

Department Billing > CCS Computing & Communication Services > Usage Charges

Department Billing | Recurring Charges | One Time Charges

Summary | Summary By Account | Individual Bills | Non-Usage Charges | Usage Charges

Usage Charges

Saved Search Charge Types (preferred) Manage | Save

Billing Date 28-FEB-2010 Banner Department CCS Department Name Computing & Communication Services

Quick Search

Usage Subtype (5 values selected) Service Number

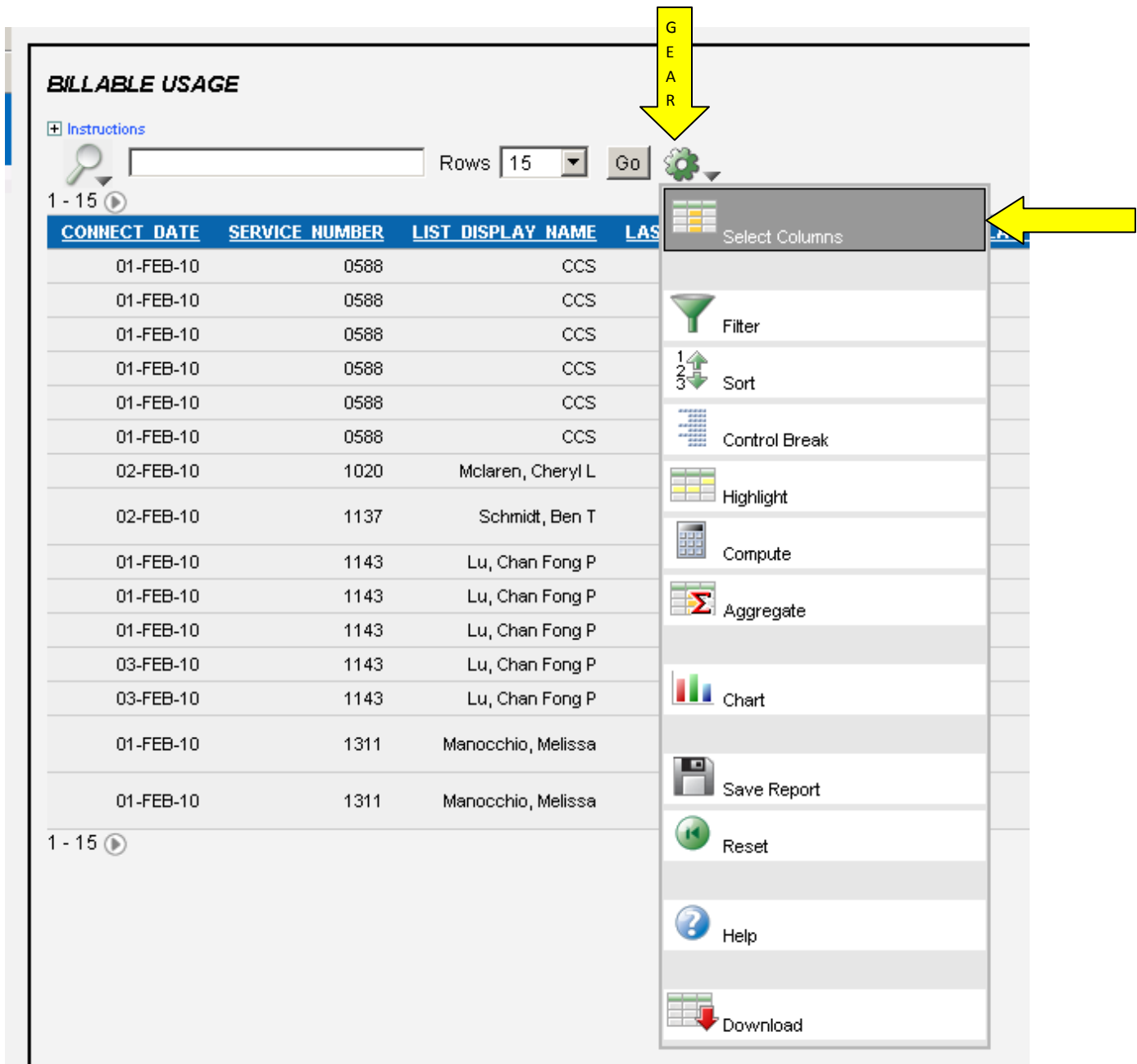
Expense Account

1 - 85 Display 250 rows per page

Connect Date	Service Number	Units	UOM	Usage Subtype	Usage Detail
01-FEB-2010 11:39:00	0588	0:38	min.	Toll Free	0588 to 888-542-2623
01-FEB-2010 11:43:00	0588	0:39	min.	Toll Free	0588 to 888-542-2623
01-FEB-2010 11:43:00	0588	2:12	min.	Toll Free	0588 to 888-542-2623
01-FEB-2010 11:39:00	0588	0:42	min.	Toll Free	0588 to 888-542-2623
01-FEB-2010 11:40:00	0588	0:38	min.	Toll Free	0588 to 888-542-2623
01-FEB-2010 11:40:00	0588	0:42	min.	Toll Free	0588 to 888-542-2623
02-FEB-2010 09:02:00	1020	3:02	min.	Toll Free	1020 to 800-216-0888
02-FEB-2010 15:52:00	1137	1:24	min.	Toll	1137 to 416-202-0026 (TORONTO, ON)

Interactive Report icon (multi-colored box) with an arrow pointing to it.

Click on the **GEAR** icon.
Choose **Select Columns**



BILLABLE USAGE

Instructions

Rows 15 Go

1 - 15

CONNECT DATE	SERVICE NUMBER	LIST DISPLAY NAME	LAS
01-FEB-10	0588	CCS	
01-FEB-10	0588	CCS	
01-FEB-10	0588	CCS	
01-FEB-10	0588	CCS	
01-FEB-10	0588	CCS	
01-FEB-10	0588	CCS	
02-FEB-10	1020	Mclaren, Cheryl L	
02-FEB-10	1137	Schmidt, Ben T	
01-FEB-10	1143	Lu, Chan Fong P	
01-FEB-10	1143	Lu, Chan Fong P	
01-FEB-10	1143	Lu, Chan Fong P	
03-FEB-10	1143	Lu, Chan Fong P	
03-FEB-10	1143	Lu, Chan Fong P	
01-FEB-10	1311	Manocchio, Melissa	
01-FEB-10	1311	Manocchio, Melissa	

1 - 15

- Select Columns
- Filter
- Sort
- Control Break
- Highlight
- Compute
- Aggregate
- Chart
- Save Report
- Reset
- Help
- Download

We recommend that you choose the columns shown below in the **Display in Report** box. Use the **Arrows** to move the items over to the **Do Not Display** box or you can double click on the item to move over to the other box. Click **Apply**.

BILLABLE USAGE

Instructions

Rows 15 Go

Select Columns

Do Not Display

DISPLAY_LOCATION
SUBSCRIBER_ID

Display in Report

CONNECT_DATE
SERVICE_NUMBER
DISPLAY_UNITS
DISPLAY_UNIT_TYPE
USAGE_SUBTYPE_NAME
USAGE_DETAIL
AMOUNT_BILLED
LIST_DISPLAY_NAME
LAST_NAME_2
EXPENSE_ACCOUNT

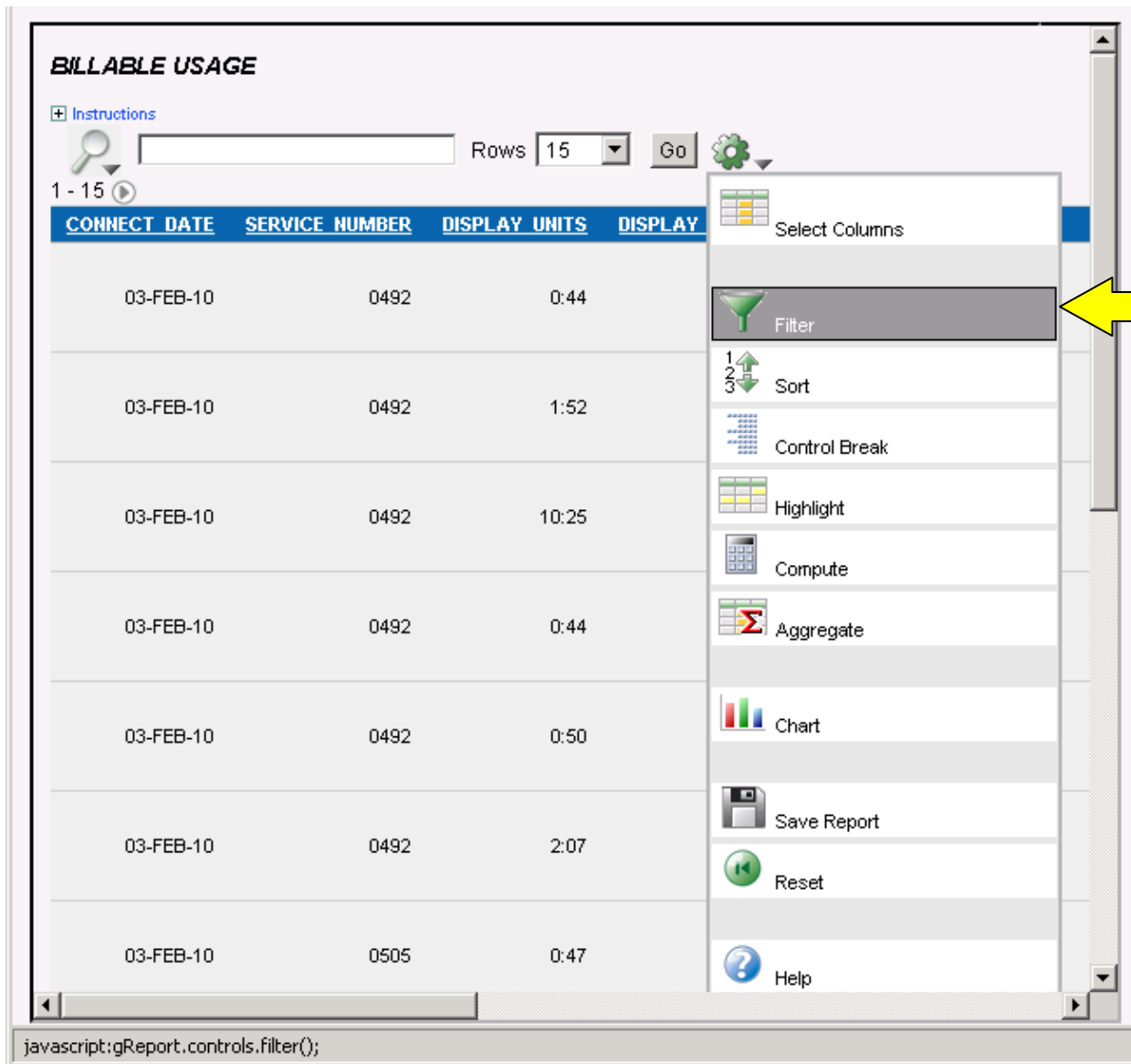
MOVE

Cancel Apply

1 - 15

CONNECT_DATE	SERVICE NUMBER	LIST DISPLAY NAME	LAST NAME 2	DISPLAY UNITS
01-FEB-10	0588	CCS	CCS	0.4
01-FEB-10	0588	CCS	CCS	0.36

Choose the **GEAR** icon again and choose **Filter**.



The screenshot displays a report titled "BILLABLE USAGE". At the top left, there is a search icon, a text input field, and a "Rows" dropdown menu set to "15". A "Go" button and a gear icon are also present. Below the search area, the text "1 - 15" is shown. The main content is a table with the following columns: "CONNECT DATE", "SERVICE NUMBER", "DISPLAY UNITS", and "DISPLAY". The table contains eight rows of data. A context menu is open on the right side of the table, listing various actions: "Select Columns", "Filter", "Sort", "Control Break", "Highlight", "Compute", "Aggregate", "Chart", "Save Report", "Reset", and "Help". A yellow arrow points to the "Filter" option in the menu. At the bottom of the report viewer, the JavaScript code "javascript:gReport.controls.filter();" is visible.

CONNECT DATE	SERVICE NUMBER	DISPLAY UNITS	DISPLAY
03-FEB-10	0492	0:44	
03-FEB-10	0492	1:52	
03-FEB-10	0492	10:25	
03-FEB-10	0492	0:44	
03-FEB-10	0492	0:50	
03-FEB-10	0492	2:07	
03-FEB-10	0505	0:47	

```
javascript:gReport.controls.filter();
```


This **Filter** is going to take away all the **Local** calls.

In the **Column**, **Operator** and **Expression** drop-downs, select the choices shown below;

USAGE_SUBTYPE_NAME * **does not contain** * **local**

Click **Apply**.

BILLABLE USAGE

+ Instructions

Rows 15 Go

Filter

Column Operator Expression

USAGE_SUBTYPE_NAME does not contain local

Cancel Apply

1 - 15

CONNECT DATE	SERVICE NUMBER	DISPLAY UNITS	DISPLAY UNIT TYPE	USAGE SUBTYPE NAME
01-FEB-10	0588	0:42	min.	Toll Free
01-FEB-10	0588	0:38	min.	Toll Free
01-FEB-10	0588	0:42	min.	Toll Free


Choose the **GEAR** icon again and select **Save Report**.


Saving the report allows you to use it each time you view the data with a click of a button.


Save the report and give it a name [eg. Long Distance Feb 2010]. Choose the **GEAR** icon once more and select **Download**.

BILLABLE USAGE


+ Instructions

SEARCH [] Rows 15 Go 

USAGE_SUBTYPE_NAME does not contain 'local' 

1 - 15 

CONNECT DATE	SERVICE NUMBER	DISPLAY UNITS	DISPLAY
01-FEB-10	0588	0:42	
01-FEB-10	0588	0:38	
01-FEB-10	0588	0:42	
01-FEB-10	0588	0:38	
01-FEB-10	0588	2:12	
01-FEB-10	0588	0:39	
02-FEB-10	1020	3:02	
02-FEB-10	1137	1:24	
01-FEB-10	1143	5:09	
01-FEB-10	1143	2:14	
01-FEB-10	1143	1:54	
03-FEB-10	1143	1:43	
03-FEB-10	1143	10:44	
01-FEB-10	1311	1:30	
01-FEB-10	1311	6:01	

1 - 15 

Select Columns

Filter

Sort

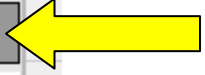
Control Break

Highlight

Compute


Aggregate

Chart

Save Report 

Reset

Help

Download 

A box will appear that will show an **Excel** icon.

Click on the **Excel** icon.

A box will appear that will give you an option to Open or Save the report.

Choose **open** to view the report or **save** to download it to your PC.

BILLABLE USAGE

+ Instructions

Rows 15 Go

Download

Choose report download format:

CSV

Cancel

USAGE_SUBTYPE_NAME does not contain 'local'

1 - 15

CONNECT_DATE	SERVICE_NUMBER	DISPLAY_UNITS	DISPLAY_UNIT_TYPE	USAG
01-FEB-10	0588	0:42	min.	
01-FEB-10	0588	0:38	min.	
01-FEB-10	0588	0:42	min.	
01-FEB-10	0588	0:38	min.	
01-FEB-10	0588	2:12	min.	

The report will be saved as a **Excel CSV** spreadsheet

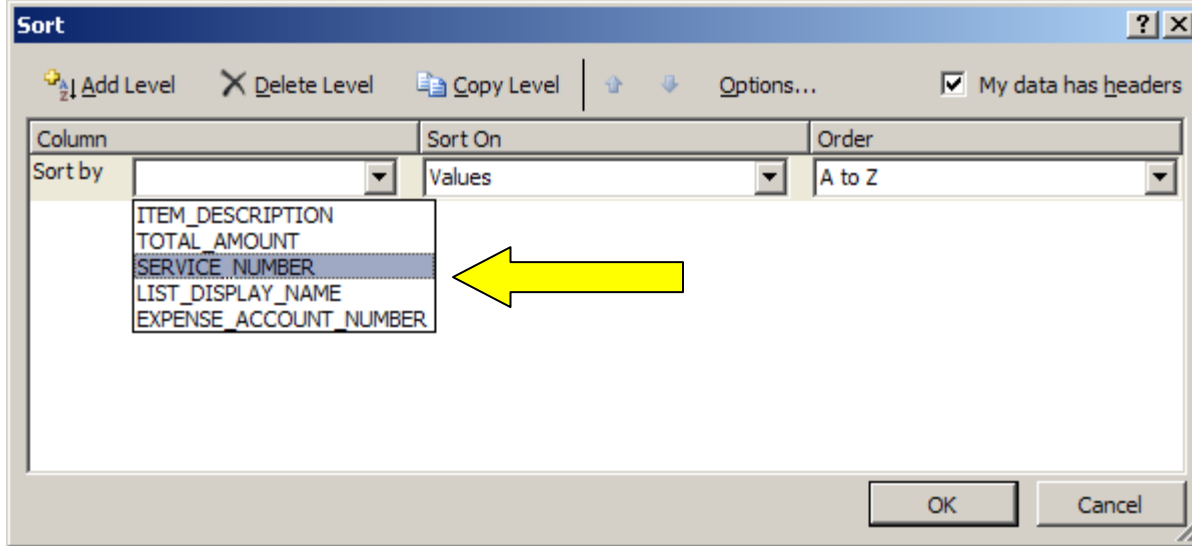
interactive_report-3.csv [Read-Only] - Microsoft Excel

CONNECT_DATE	SERVICE_NUMBER	DISPLAY_UNITS	DISPLAY_UNIT	USAGE_SUBTY	USAGE_DETAIL	AMOUNT	LIST_DISPLAY_NAME	LAST_NAME_2	EXPENSE_ACCOUNT
1-Feb-10	588	0:42 min.		Toll Free	0588 to 888-542-2623	0	CCS	CCS	100000-555-1400
1-Feb-10	588	0:38 min.		Toll Free	0588 to 888-542-2623	0	CCS	CCS	100000-555-1400
1-Feb-10	588	0:42 min.		Toll Free	0588 to 888-542-2623	0	CCS	CCS	100000-555-1400
1-Feb-10	588	0:38 min.		Toll Free	0588 to 888-542-2623	0	CCS	CCS	100000-555-1400
1-Feb-10	588	2:12 min.		Toll Free	0588 to 888-542-2623	0	CCS	CCS	100000-555-1400
1-Feb-10	588	0:39 min.		Toll Free	0588 to 888-542-2623	0	CCS	CCS	100000-555-1400
2-Feb-10	1020	3:02 min.		Toll Free	1020 to 800-216-0888	0	Mclaren, Cheryl L	Mclaren	100000-555-1400
2-Feb-10	1137	1:24 min.		Toll	1137 to 416-202-0026 (TOF	0.28	Schmidt, Ben T	Schmidt	100000-555-1400

We recommend that you sort your columns by **Service Number**.

This way you will see all related charges for a specific extension number and person.

From the **menu** choose **Data > Sort** and the following box will appear. Select **service number** & click **O.K.**



Summary by Account

Choose **Summary by Account** to view totals for all **Expense Accounts** assigned to your Department and the total charges for each account..

Department Billing > CCS/TEL CCS: Telephones > Summary by Account

Department Billing | Recurring Charges | One Time Charges

Summary | Summary By Account | Summary | Usage Charges | Usage Charges

SEARCH

SUMMARY BY ACCOUNT Sa

Billing Date 28-FEB-2010 Banner Department CCS/TEL Department Name CCS:
Expense Account Charge

1 - 4 Display rows per page

Expense Account	Accounts	Usage Subtype	Total
100000-555-1400	Recurring Charges		1,187.99
100000-555-1400	Usage	Local	0.00
100000-555-1400	Usage	Toll	8.60
100000-555-1400	Usage	Toll Free	0.00

1 - 4

Individual Bills

To view a specific individual's charges, or to create a PDF report that can be sent, select **Individual Bills**. Click **Search** to see all users in your department. Then select the specific individual by clicking on the **blue Subscriber I.D.**

PINNACLE

DAWDILLABAUGH

Department Billing > CCS/TEL CCS: Telephones > Individual Bills

Department Billing | Recurring Charges | One Time Charges

Summary | Summary By Account | **Individual Bills** | Non-Usage Charges | Usage Charges

Search Search

INDIVIDUAL BILLS Saved Se

Billing Date 28-FEB-2010 Banner Department CCS/TEL Department Name CCS: Teleph

Subscriber ID First Name MI Last Name

1 - 8 Display rows per page

Subscriber ID	Name	Subscriber Group	Cost Center	Current Char
2088133	CCS/TEL	Campus		96
4334071	il, Les A	Campus		:
4490399	Lefebvre, Richard	Campus		:

A **Bill Summary** will show all **Charges** related to that individual as well as the **Expense Accounts**.
 Choose the **View Report** button to create a PDF bill of the individual, that you can **Save** to your PC.
 [local calls will show in the report]

PINNACLE

DAWNDILLABAUGH

Department Billing > CCS/TEL CCS: Telephones > Individual Bills > Dillabaugh, Dawn

Department Billing | Recurring Charges | One Time Charges

Summary | Non-Usage | Usage

View Report **Create PDF**

BILL SUMMARY

Billing Date 28-FEB-2010 Billing Cycle Monthly
 Name Dawn Dillabaugh Subscriber ID 6143472 Banner ID 1007
 Current Charges Due 21.00 Total Amount Due 21.00 Payment Due 31-M

Summary Of Charges

Category ^	Usage Subtype	Total Amount	Total Charge Records
Recurring Charges	-	21.00	1
Usage	Local	0.00	3
Usage	Toll Free	0.00	2

Summary Of Charges By Account

Expense Account Number ^	Category	Usage Subtype	Total Amount	Total
100000-555-1400	Recurring Charges	-	21.00	
100000-555-1400	Usage	Local	0.00	
100000-555-1400	Usage	Toll Free	0.00	

PDF of Individual Bill

PINNACLE Subscriber Bill

PAETEC Communications Management Suite 10-Mar-2010 11:01:24 am

Bill To Dept: CCS: Telephones

Service: 3838 Extension

Usage Detail

Toll Free

DATE	TIME	USAGE DETAIL	UNITS (MIN.)	BILLED
02-Feb-2010	8:30 am	3838 to 800-501-9979	70:23	0.00
03-Feb-2010	8:31 am	3838 to 800-501-9979	111:51	0.00
Total Toll Free: (2)			182:14	0.00

You may also view **Non-Usage & Usage** details for an Individual user.
 From the **Individual Bills** sub menu choose **Non-Usage** and click **search**.

Department Billing > CCS/TEL CCS: Telephones > Individual Bills > Dillabaugh, Dawn > Non-Usage

Department Billing | **Recurring Charges** | One Time Charges

Summary | **Non-Usage** | Equipment & One-time

NON-USAGE CHARGES Saved Search All

Billing Date 28-FEB-2010 **Billing Cycle** Monthly
Name Dawn Dillabaugh **Subscriber ID** 6143472 **Banner ID** 100755139
Current Charges Due 21.00 **Total Amount Due** 21.00 **Payment Due** 31-MAR-2010

Quick Search

Charge Category (all) **Service** (all)

Expense Account

1 - 1 Display 15 rows per page

Charge Category	Charge Code	Description	Amount	Quantity	Total	Service Num
Recurring Charges	VOIP_5340	5340 VOIP Set	21.00	1	21.00	3838

From the **Individual Bills** sub menu choose **Usage** and click **search**.

Department Billing > CCS/TEL CCS: Telephones > Individual Bills > Dillabaugh, Dawn > Usage

Department Billing | Recurring Charges | **One Time Charges**

Summary | Non-Usage | **Usage** | Long Distance

USAGE Saved Search

Billing Date 28-FEB-2010 **Billing Cycle** Monthly
Name Dawn Dillabaugh **Subscriber ID** 6143472 **Banner ID** 100755139
Current Charges Due 21.00 **Total Amount Due** 21.00 **Payment Due** 31-MAR-2010

Quick Search

Service Number

Account Number

1 - 5 Display 15 rows per page

Connect Date	Service Number	Units	UOM	Usage Subtype	Us
02-FEB-2010 08:30:00	3838	70:23	min.	Toll Free	3838 to 800-501-4
03-FEB-2010 08:31:00	3838	111:51	min.	Toll Free	3838 to 800-501-4
03-FEB-2010 14:28:00	3838	1:25	min.	Local	3838 to 612-727-7

Miscellaneous

The **Recurring Charges** and **One Time Charges** tabs are not specific to a monthly bill.

The **Recurring Charges** section will show all current rental equipment and the full monthly charge rate for each item.

One Time Charges section provides a view of all One Time Charges ever applied to your department.

The screenshot shows the PINNACLE software interface for Department Billing. At the top, the user name 'DAWNDILLABAUGH' is displayed. Below this, the 'Department Billing' section contains three tabs: 'Department Billing', 'Recurring Charges', and 'One Time Charges'. A yellow arrow points to the 'One Time Charges' tab. Below the tabs is a toolbar with various icons (search, back, forward, help, add, print, refresh, close) and buttons for 'Search' and 'Create Multi-Depe'. The main content area is titled 'DEPARTMENT BILLING' and includes a 'Quick Search' section with a 'Billing Date' range selector and a 'Banner Department' dropdown menu currently set to 'CCS'.

Reports Output

Multi-Department Bill Reports

If you administer more than one department, you can create **one** bill that includes all your departments. Choose **Department Billing** tab.

Put a **check** beside each department that you want in the report.

DEPARTMENT BILLING

Quick Search

Billing Date [] - []

Banner Department [] Department Name []

1 - 125 Display 250 rows per page

<input type="checkbox"/>	Billing Date	Banner Department	Department Name	Di
<input checked="" type="checkbox"/>	28-FEB-2010	ADMISS	Admissions Services	DEI
<input checked="" type="checkbox"/>	28-FEB-2010	ADVANCE	University Advancement	DEI
<input checked="" type="checkbox"/>	28-FEB-2010	AFR STUD	African Studies	DEI

A pop-up window will appear that will let you choose to include **Detailed** information by putting a **Check** in the box beside **Show Subscriber Detail** , or just **Summary** information.

Give your report a **Name** and click **O.K**

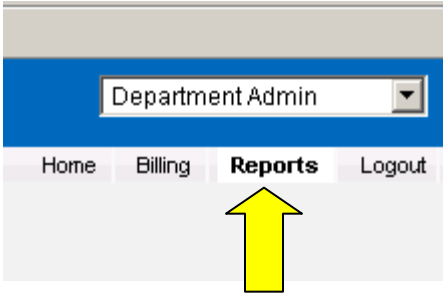
Create a single report containing multiple departmental bill reports

Report Output Name: Multi-Department Bill

Show Subscriber Detail: Detailed

Ok Cancel

To view the **Multi-Department Bill** report, choose the **Reports** section from the upper right hand side of the screen.



This section will provide a tab called **Outputs**.

Click on the **Output Name** of the report you just created.

A pop-up window will show the report and you will have an option to **Save** the report as a **PDF** file to your PC.

Outputs

Outputs

List

Search Delete Checked Hide Checked

OUTPUTS Saved Search

Quick Search

Output Name multi Date Run -

Report Name Run By Only Hidden Yes

1 - 11

			Output Name	Report Name	Run By	Date Run
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Multi-Department Bill	Department Bill - Multiple	DAVNDILLABAUGH	12-MAR-2010 09:47 AM
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Multi-Department Bill	Department Bill - Multiple	DAVNDILLABAUGH	12-MAR-2010 07:51 AM

A pop-up window will show the report where you will have an option to **Save** the report as a **PDF** file to your PC.



PINNACLE
Departmental Bill
 Communications Management Suite
 12-Mar-2010 9:47:42 am

DEPARTMENT: ADMISS **Admissions Services**
BILLING DATE: 28-Feb-2010

Subscriber-Account Overview

SUBSCRIBER (NAME & ID)	ACCOUNT	TOTAL	RECURRING	ONE TIME	USAGE	TAX	OTHER
------------------------	---------	-------	-----------	----------	-------	-----	-------