CUIT Pinnacle Billing System
Account Manager Training
Upgraded Version

Summer 2020
Agenda

- Overview of the Pinnacle Online Telecommunications Billing System
- Pinnacle System Terminology
- Pinnacle System Access Levels
- Access to Pinnacle System
  - Mozilla Firefox, Microsoft Edge or Internet Explorer 11 browser
  - DUO authentication and VPN connection required
- Account Manager Features
- Retrieving Monthly Recurring Charges
- Frequently Asked Questions
- Contact Us
CUIT Pinnacle System Overview

- The upgraded Pinnacle systems provides a modern user interface for the management of chargeback information for many CUIT services.
- Pinnacle allows Columbia Departmental Administrators to view monthly billing reports generated by the Billing System.
- Department Administrators and Administrative Coordinators need to request access thru ServiceNow or via email to askcuit@columbia.edu.
  - *Provide UNI and 7-digit department number(s) the user will need access to.*
## CUIT Pinnacle System Terminology

### Important Pinnacle Terms/Functions to Remember

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search</td>
<td>Click to retrieve information</td>
</tr>
<tr>
<td>Subscribers</td>
<td>Refers to users</td>
</tr>
<tr>
<td>Service Numbers</td>
<td>Refers to phone numbers</td>
</tr>
<tr>
<td>Recurring Charges</td>
<td>Refers to monthly and one-time charges (e.g. desk phone and mobile device purchase)</td>
</tr>
<tr>
<td>Usage Charges</td>
<td>Refers to usage charges (e.g. international call)</td>
</tr>
</tbody>
</table>
# CUIT Pinnacle System Access Levels

<table>
<thead>
<tr>
<th>Account Manager*</th>
<th>Department Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>For Account / Chartstring Searches</td>
<td>For Departmental Charge Searches</td>
</tr>
</tbody>
</table>

**NOTE:** We recommend using the Account Manager role when reconciling charges between Pinnacle and ARC.

## System Requirements

<table>
<thead>
<tr>
<th><strong>Web Browser</strong></th>
<th>Mozilla Firefox, Microsoft Edge, Internet Explorer v.11</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>DUO</strong></td>
<td>Multifactor Authentication Provider</td>
</tr>
<tr>
<td><strong>VPN</strong></td>
<td>Remote Access Service</td>
</tr>
</tbody>
</table>
Multifactor authentication (MFA) uses multiple proofs of identity to ensure you are authorized to access the service or resource that you are requesting.

- CUIT uses Duo as the MFA service to verify your identity for Columbia’s centralized applications. With Duo, you can use a mobile app, a text message or a phone call to authenticate.

- Most people use Duo via the mobile app, Duo Mobile, which runs on a variety of smartphones and tablets.

- Click here to set up and test Duo MFA
If you are remote or on an insecure (unencrypted) wireless networks on the Columbia campus, connection to the Columbia network can be accessed via VPN and Citrix.

- Install the Cisco AnyConnect app
  - Desktop/Laptop
    - Visit and log in to [vpn.cc.columbia.edu](http://vpn.cc.columbia.edu) to download the desktop client, then follow our step-by-step VPN installation instructions.
  - Mobile Device
    - Download and install the app from the Apple or Google Play Store. Enter vpn.cc.columbia.edu for the server name
Account Manager Features

- Account Manager role allows users to access Pinnacle reports by Account Number/Chartstring
- Reports generated from Account Manager role should reconcile against charges posted in ARC
- Provides itemized list of all unique accounts within a department, displaying different Projects, Initiatives, Segments, etc. billed during a particular month
CUIT Pinnacle System Upgrade:
Retrieving Monthly Recurring Charges

Access the Pinnacle website. Enter UNI & Password to Login
CUIT Pinnacle System Upgrade:
Retrieving Monthly Recurring Charges

Click to view and select Role
CUIT Pinnacle System Upgrade:

Retrieving Monthly Recurring Charges
CUIT Pinnacle System Upgrade:
Retrieving Monthly Recurring Charges

Click to view bills by account
CUIT Pinnacle System Upgrade:

Retrieving Monthly Recurring Charges

Click to view expanded menu
CUIT Pinnacle System Upgrade:

Retrieving Monthly Recurring Charges

Click to view monthly bills by account
CUIT Pinnacle System Upgrade:

Retrieving Monthly Recurring Charges

Default view varies depending upon user access
CUIT Pinnacle System Upgrade:

Retrieving Monthly Recurring Charges

Search monthly bills by billing date or chartstring/account number
Search by Billing Date
CUIT Pinnacle System Upgrade:

Retrieving Monthly Recurring Charges

Billing date search should be entered as 15-MON-YEAR
CUIT Pinnacle System Upgrade:
Retrieving Monthly Recurring Charges

Click to execute search
CUIT Pinnacle System Upgrade:
Retrieving Monthly Recurring Charges

Search populates monthly bills by billing date
Search by Account Number/Chartstring
CUIT Pinnacle System Upgrade: Retrieving Monthly Recurring Charges

Account number/chartstring can include all or a few of the components, separated by a wildcard “%” (e.g. enter %1234567% only or %1234567%GENRL%UR004672%)
CUIT Pinnacle System Upgrade:
Retrieving Monthly Recurring Charges

Click to execute search
CUIT Pinnacle System Upgrade:
Retrieving Monthly Recurring Charges

Search populates monthly bills by account number/chartstring
CUIT Pinnacle System Upgrade:
Retrieving Monthly Recurring Charges

After searching by either Billing Date or Account Number/Chartstring, click the system populated Billing Date to view the itemized monthly recurring charge information.
CUIT Pinnacle System Upgrade: Retrieving Monthly Recurring Charges

Account Billing Summary provides an overview of the recurring, one-time and usage charges incurred during the selected billing date.
“Breadcrumb”: Pinnacle leaves a trail of the selections leading the current view (in this case we are viewing the charges billed to COLUM--1234567-01-GENRL-UR004672-01-00000-00000000--200). Click one of these headings to return to the respective screen (e.g. Account Billing will display Account Billing Summary).

Recurring Charges: contains recurring and one-time charges incurred in this particular month; also referred to as non-usage charges.

Usage Charges: contains usage charges incurred in this particular month.

Totals: sum of recurring and usage charges incurred in this particular month.

NOTE: One-Time Charges: any one-time charges incurred during the month, would be listed here.
CUIT Pinnacle System Upgrade:

Retrieving Monthly Recurring Charges

View Report: Select to view charges in a PDF format

Account Billing*: Select to view charges in a CSV/Excel format *recommended

Retrieve monthly bills as a PDF or CSV/Excel Report
CUIT Pinnacle System Upgrade:
Retrieving Monthly Recurring Charges

View Report Search
CUIT Pinnacle System Upgrade:

Retrieving Monthly Recurring Charges

Click to generate the monthly bill as a PDF file
(note: this reporting option lists the itemized charges categorized in numerous ways, resulting in a repetition of services throughout the document and is not a duplication of charges)
CUIT Pinnacle System Upgrade:

Retrieving Monthly Recurring Charges
CUIT Pinnacle System Upgrade:
Retrieving Monthly Recurring Charges

<table>
<thead>
<tr>
<th>Category</th>
<th>Total Amount</th>
<th>Total Records</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recurring Charges</td>
<td>12,192.00</td>
<td>411</td>
</tr>
<tr>
<td>Usage</td>
<td>27.25</td>
<td>5000</td>
</tr>
</tbody>
</table>

**Totals**

<table>
<thead>
<tr>
<th>Total Amount</th>
<th>Total Records</th>
</tr>
</thead>
<tbody>
<tr>
<td>12,220.05</td>
<td>9480</td>
</tr>
</tbody>
</table>

Report generated as a PDF document.
CUIT Pinnacle System Upgrade:

Retrieving Monthly Recurring Charges

Account Billing Search
Select to view non-usage (recurring charges) for this particular month.
CUIT Pinnacle System Upgrade:

Retrieving Monthly Recurring Charges

Report populated
CUIT Pinnacle System Upgrade:
Retrieving Monthly Recurring Charges

- Use fields to narrow search
- Previous
- Next
- Export CSV/Excel
- Personalize
- "Breadcrumb"
- Report populated
- Toggle headers to sort in ascending or descending order
- Click “Next Page” to view additional rows or increase “Rows Per Page”
CUIT Pinnacle System Upgrade:

Retrieving Monthly Recurring Charges

Interactive Report generates an interactive web report providing customized filtering and sorting options.
CUIT Pinnacle System Upgrade:

Retrieving Monthly Recurring Charges

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CUIT Pinnacle System Upgrade:
Retrieving Monthly Recurring Charges

Select to download CSV/Excel spreadsheet

Press OK to open
CUIT Pinnacle System Upgrade:
Retrieving Monthly Recurring Charges

Itemized list of non-usage charges (recurring and one-time) incurred during this particular month
CUIT Pinnacle System Upgrade:

Retrieving Monthly Recurring Charges

Select to personalize columns

Press Edit Columns to change visibility

Press ← or → to move column

Press – or drag the column to left side panel to hide

Press to restore column position and visibility

Press to Save

Press to restore defaults
Select to view usage (all calling records including long distance dialing) for this particular month.
CUIT Pinnacle System Upgrade:

Retrieving Monthly Recurring Charges

Itemized list of usage charges incurred during this particular month.
**CUIT Pinnacle System Upgrade:**

**Retrieving Monthly Recurring Charges**

Select to download CSV/Excel spreadsheet

Press OK to open

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### Usage Charges

#### Billing Date: 11/3/2010

<table>
<thead>
<tr>
<th>Service Number</th>
<th>Usage Subtype</th>
<th>Usage Description</th>
<th>Usage Units</th>
<th>Usage Duration</th>
<th>Usage Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1234567-01-GENRL-UR004672-01-00000-00000000-200</td>
<td>Wireless Plans</td>
<td></td>
<td>3.96 GB</td>
<td>200 mins</td>
<td></td>
</tr>
</tbody>
</table>
CUIT Pinnacle System Upgrade:
Retrieving Monthly Recurring Charges

Itemized list of usage charges incurred during this particular month
CUIT Pinnacle System Upgrade:

Retrieving Monthly Recurring Charges

Use Breadcrumb to return to Account Billing screen listing all monthly bills
CUIT Pinnacle System Upgrade:

Retrieving Monthly Recurring Charges

Return to Account Billing screen
These menu options DO NOT yield the monthly recurring charges and therefore, should not be used at this time.
Frequently Asked Questions

- **How can I obtain access to Pinnacle?**
  
  *Access must be requested by the Departmental Administrator via ServiceNow by accessing the system or emailing askcuit@columbia.edu to generate a request. Please include UNI as well as the 7-digit department number(s) the user will need access to.*

- **How can I make changes to the monthly bill?**
  
  *All changes must be requested via the ServiceNow system.*

- **What if a charge does not belong to our department?**
  
  *Please submit a Billing Inquiry via ServiceNow as soon as possible. The turnaround time is generally 5-7 business days.*

- **Can I create a report for YTD charges?**
  
  *Unfortunately charges can only be accessed by month at this time.*

- **What is the Billing Cycle?**
  
  *Our billing cycle encompasses charges incurred from the 15th of the current month through the 14th of the following month (e.g. 15-JUL-2020 bill includes charges from the 15th of June through the 14th of July).*
Contact Us

ServiceNow

Website: https://columbia.service-now.com/
E-mail: askcuit@columbia.edu
CUIT Services: www.cuit.columbia.edu

- For billing questions, chartstring changes, Pinnacle access and training, please create a ticket in the CUIT ServiceNow instance
- To initiate service, request a service change or disconnection, please create a ticket in the CUIT ServiceNow instance