

# Pinnacle - DVA Manual - Phone Orders

---

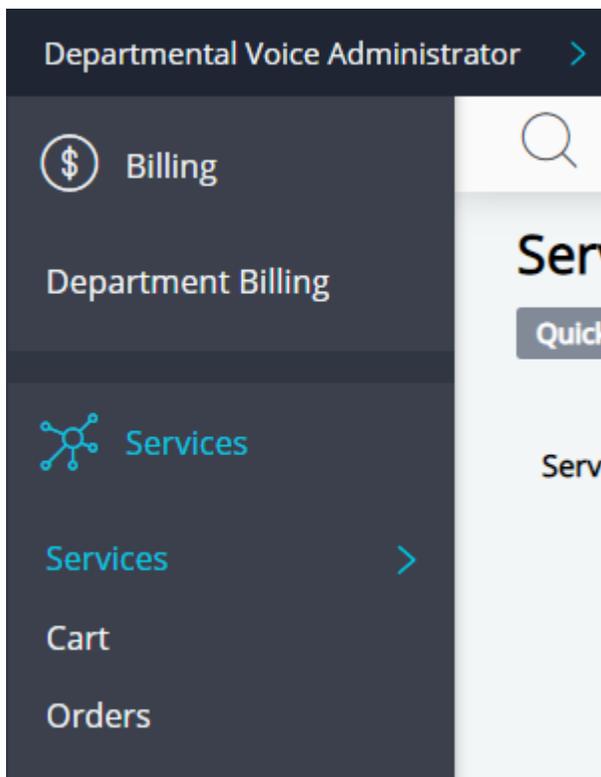
## Part 1: Welcome to Pinnacle!

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

**Services** Saved Search  [Clear](#) [Manage](#) [Save](#)

**Quick Search**

Department Number  Service Status  Disconnected  In Service  Suspended  Vacant  
 Service Number (no spaces/dashes)  6048221374 Service Type  (all) [Select](#)  
 Subscriber First Name  Subscriber Last Name   
 User Defined ID  Subscriber Status  Active  Inactive  
 Building Code  Building Name   
 Floor  Room

1 - 1 Rows Per Page  250

Department	Subscriber	Group	Service	Service Type	Switch	Service Status	Line Type	Location
1205 (CLASS NEAR E&REL STU)	<a href="#">MENKIS, RICHARD</a>	AdminTel Internal	6048221374	Voice	Cisco Server Rating	In Service		121-3 (BUCHANAN BLOCK C) / 2nd / C2

1 - 1

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:

[Add](#)
[Move Service](#)
[Change Service](#)
[Disconnect Service](#)

### Subscriber, Service and Location Details

Subscriber

Name	RICHARD MENKIS	Subscriber ID	6512725
		User Defined ID	8221374
Group	AdminTel Internal	Billing Cycle	AdminTel Internal
Status	Active	Status As Of Date	26-NOV-1999
Department Number	1205	Department Name	CLASS NEAR E&REL STU <a href="#">Bill To Department</a> <input checked="" type="checkbox"/>
Cost Center		Tax Status	None
Hierarchy Path			

**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'.**

**Subscriber, Service and Location Details**

**Subscriber**

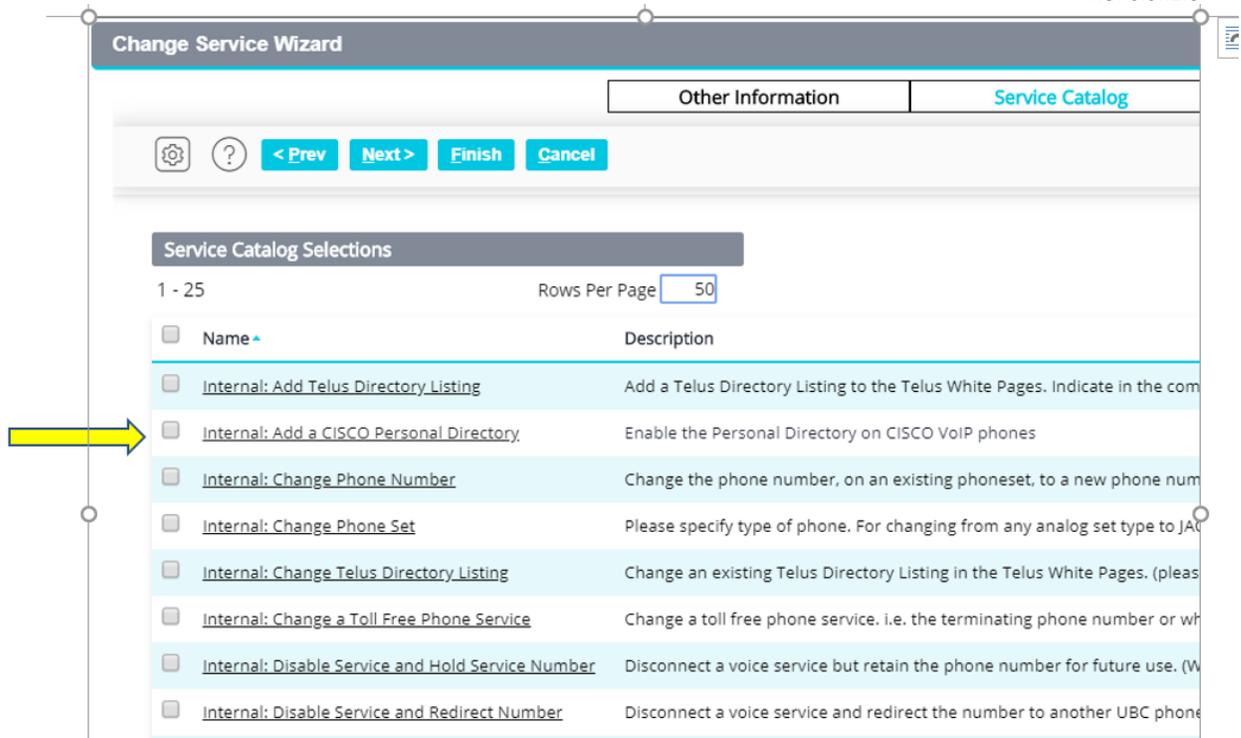
<b>Name</b> RICHARD MENKIS	<b>Subscriber ID</b> 6512725
<b>Group</b> AdminTel Internal	<b>User Defined ID</b> 8221374
<b>Status</b> Active	<b>Billing Cycle</b> AdminTel Internal
<b>Department Number</b> 1205	<b>Status As Of Date</b> 26-NOV-1999
<b>Cost Center</b>	<b>Department Name</b> CLASS NEAR E&REL STU <b>Bill To Department</b> <input checked="" type="checkbox"/>
<b>Hierarchy Path</b>	<b>Tax Status</b> None

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:

Administrator > Services > Cart

Submit Checked Remove Checked Edit Checked

### Cart

1 - 3 Rows Per Page 50

	Department	Service Request	Service Number	Est Recurring Charges	Est One Time Charges	Date / Time
<input checked="" type="checkbox"/>	CLASS NEAR E&REL STU	Change Voice Service	6048221374	0.00	0.00	28-APR-2020 15:31:19
<input checked="" type="checkbox"/>	CLASS NEAR E&REL STU	Change Voice Service	6048221374	0.00	0.00	28-APR-2020 15:32:30
<input type="checkbox"/>	CLASS NEAR E&REL STU	Change Voice Service	6048221374	0.00	0.00	28-APR-2020 15:30:15

1 - 3

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

You will now see this screen:

Cart Checkout Wizard

Checkout Items View Results

Checkout Items Cancel

Instructions

CHECK THIS BOX when submitting multiple orders

1 - 2 Rows Per Page 50

Department Number	Department Name	Service Request	Service Number	Req Due Date	Estimated Recurring Charges	Estimated One Time Charges	Date / Time
1205	CLASS NEAR E&REL STU	Change Voice Service	6048221374	21-APR-20	0.00	0.00	28-APR-2020 15:32:30
1205	CLASS NEAR E&REL STU	Change Voice Service	6048221374	21-APR-20	0.00	0.00	28-APR-2020 15:31:19

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 'CheckoutItems'.

**Congratulations, you are done! – [Click here to go back to Placing Phone Orders.](#)**



- Click 'Next'

. You will now see the following screen

**Add Service To Subscriber Wizard**

Service Type	Other Information	New Location
--------------	-------------------	--------------

**< Prev** **Next >** **Finish** **Cancel**

**New Service Information**

Service Type PBN

**Subscriber**

Subscriber ID 6512725      User Defined ID 8221374  
Name RICHARD MENKIS      Group AI (AdminTel Internal)

**Other Information**

Project

Requested Date  MDT

Any more information

**Contact**

Select Existing Contact

Contact

First Name

Last Name

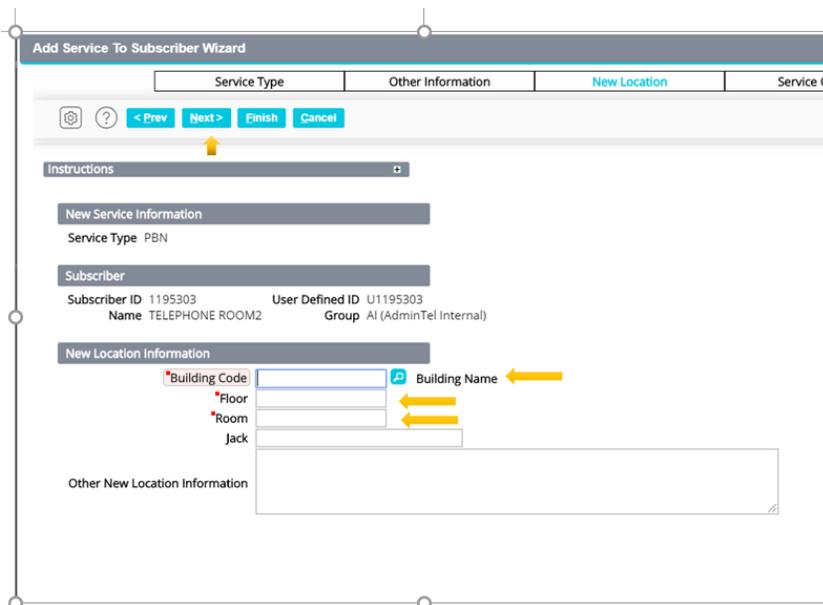
Primary Phone

Primary Email

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:

**Add Service To Subscriber Wizard**

Service Type | Other Information | New Location | **Service Catalog** | Work Order Additional Infor

< Prev **Next >** Finish Cancel

Instructions

**New Service Information**  
 Service Type PBN

**Subscriber**  
 Subscriber ID 1195303 User Defined ID U1195303  
 Name TELEPHONE ROOM2 Group AI (AdminTel Internal)

**New Location Information**  
 On Site Contact Information 301 / 301 / 3112 /

**Service Catalog Selections**  
 1 - 1 Rows Per Page 250

<input type="checkbox"/>	Name	Description	Est Recurring Charges	Est One Time Charges	Switch	Approval Required
<input type="checkbox"/>	Internal: New PBN	Add a new PBN (Personal Billing Number or Long Distance Authorization Code) for a subscriber.	0.00	0.00		Not Required

1 - 1

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’.**

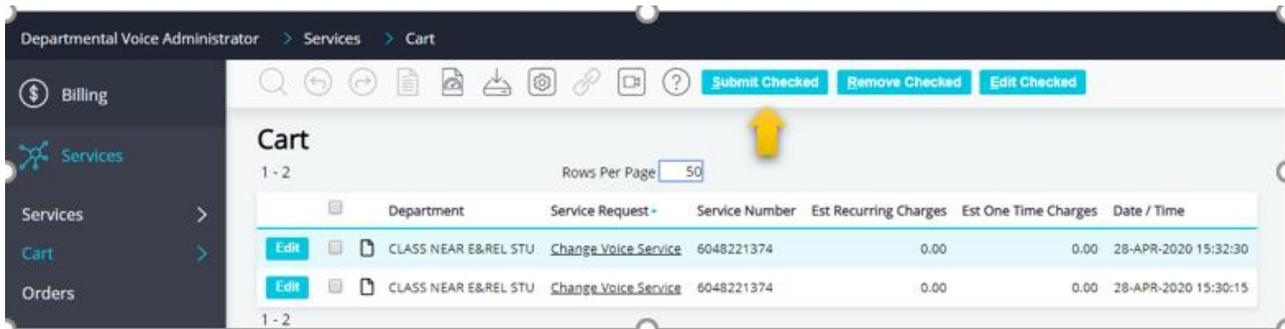
- g. A new line for a non-employee, such as contractors, conference/meeting rooms, classrooms, etc., select one of the **‘Internal: Other Basic/Enhanced/Multiline/Jack Only Service’** offerings as appropriate.
2. If you wish to add Voice Mail to the new service, also put a check in the box next to **‘Internal: 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](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’**.

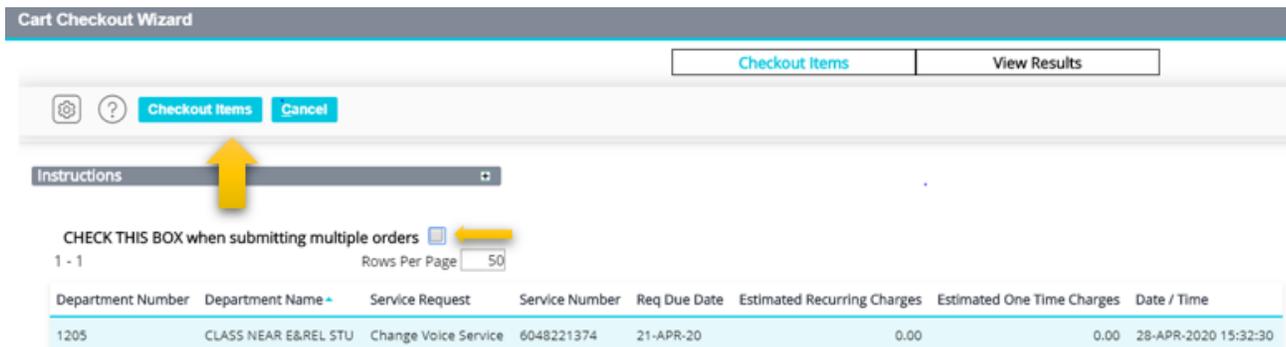
- You will now see a page summarizing all the information you have entered. Please look it over and then click **'Finish'**.
- If there are no errors, you will be taken back to the **'Services'** page.
- If you have more orders to place, click on 'Add Subscriber And Service' or search for the next service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

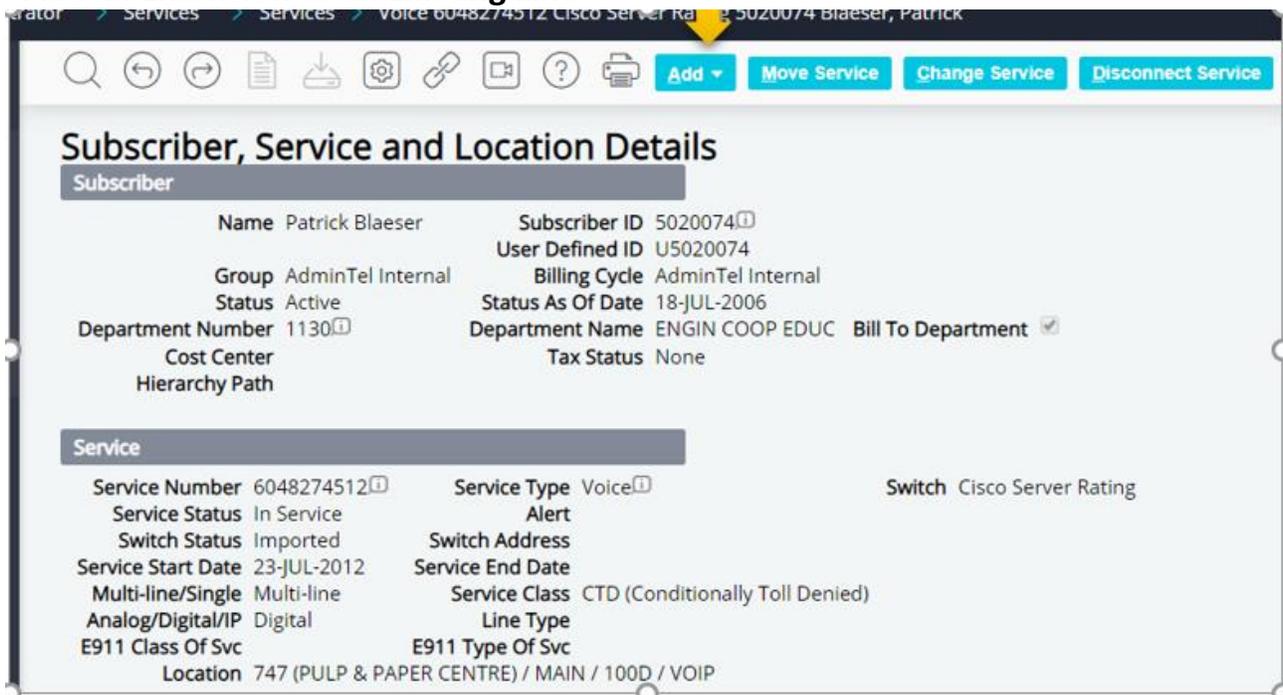
You will now see this screen:



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 'CheckoutItems'**.

**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:

Next >
Finish
Cancel

Subscriber

Subscriber ID 8343640
User Defined ID  
Name Stephanie Lee
Group AI (AdminTel Internal)

Service Information

Service Number 6048229641
Service Type Voice
Switch Cisco Server Rating  
Service Status In Service
Alert  
Switch Address  
Location 747 (PULP & PAPER CENTRE) / MAIN / 109 / VOIP

Other information

Project 
  
Requested Date 
MDT   
Any more information

Contact

Select Existing Contact   

\*Contact  
First Name   
Last Name   
Primary Phone   
Primary Email

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:

The screenshot shows a web-based form for entering phone order details. At the top, there are navigation buttons: '< Prev', 'Next >', 'Finish', and 'Cancel'. Below this is an 'Instructions' section. The main form is divided into several sections:

- Subscriber:** Subscriber ID 1618129, User Defined ID U1618129, Name Elaine Hu, Group AI (AdminTel Internal).
- Service Information:** Service Number 6048229643, Service Type Voice, Switch Cisco Server Rating, Service Status In Service, Alert, Switch Address, Location 747 (PULP & PAPER CENTRE) / MAIN / 109 / VOIP.
- New Location Information:** This section contains input fields for 'Building Code', 'Floor', 'Room', and 'Jack'. A 'Building Name' field is also present, which is populated automatically based on the 'Building Code'. Below these fields is a large text area for 'Other New Location Information'. Yellow arrows point to each of these input fields.

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:

Switch Address  
 Location 747 (PULP & PAPER CENTRE) / MAIN / 100D / VOIP

New Location Information  
 On Site Contact Information 301 / 2 / 234 /

Service Catalog Selections  
 1 - 21 Rows Per Page 250

Name	Description
<input type="checkbox"/> Internal: Add Telus Business (1B) Line or ISDN	Install a Telus Business (1B) Line or ISDN. Charge will come from Telus and will be added to the bill.
<input type="checkbox"/> Internal: Add Telus Directory Listing	Add a Telus Directory Listing to the Telus White Pages. Indicate in the comments how you want the listing.
<input type="checkbox"/> Internal: Add Toll Free Phone Number	Add a toll free phone number. Please provide phone line that this toll free number will be added to.
<input type="checkbox"/> Internal: Add WiTel set to an existing service	Add a WiTel set to an existing service. <a href="#">Click Here</a> to view details about the WiTel service.
<input checked="" type="checkbox"/> Internal: Add an Additional Location	Add an additional location to an existing service. Monthly charges vary depending on type of service.

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:

Instructions

New Subscriber Information  
 Subscriber gdonepud edon Department 1801 (FACULTY OF LAW)  
 Subscriber Group AI (AdminTel Internal)

New Service Information  
 Service Type Voice

New Location Information  
 On Site Contact Information 301 / 3 / 3112 /

Additional Information

\*MRC (Monthly Recurring Charges) Speedchart (Required for new services)

\*OCC (One Time Charges) Speedchart (Required for new services)

\*Long Distance (Y/N)? (Required for new services)

\*Toll (Long Distance Charges) Speedchart (Required for new services)

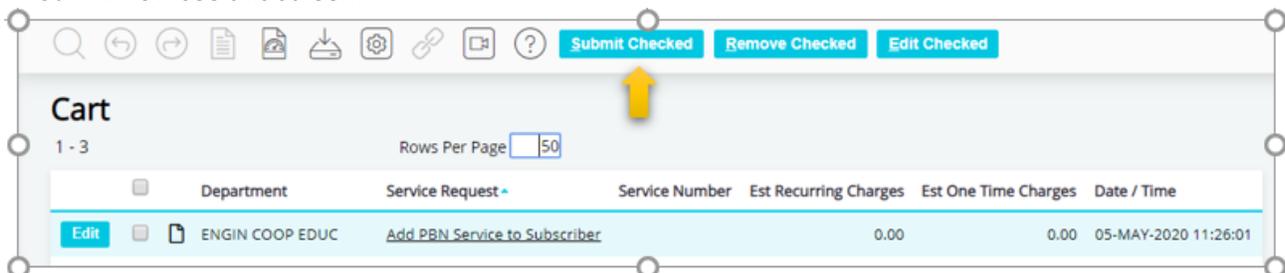
\*Subscriber's Email Address (Required for new services)

\*Service Use (select one) (Required for new services)

\*Subscriber's CWL ID or Employee ID (If the CWL ID or Employee ID are not available, please leave this field blank)

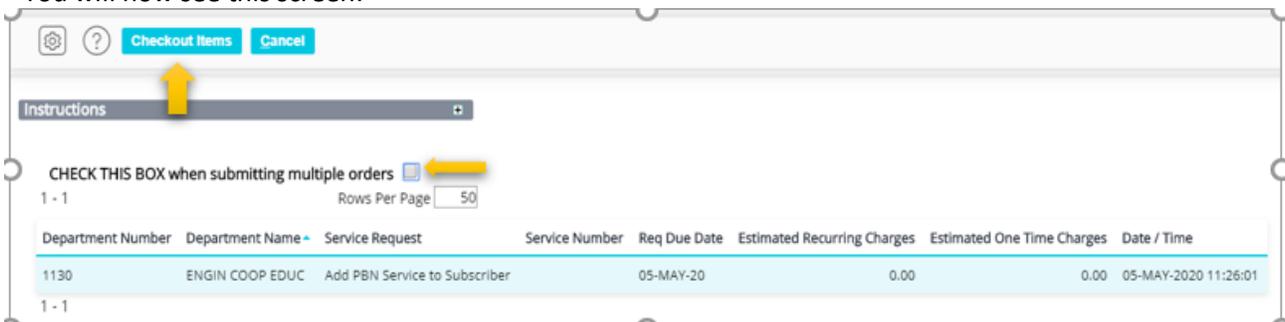
- New locations require **Speedchart** information for billing. Please fill in (**all entries are required**):
  - **'MRC Speedchart'** – Recurring charges
  - **'OCC Speedchart'** – One time charges
  - **'Long Dist Y/N?'** – Should outgoing long distance be allowed, Y/N? Note – must be the same as the main line
  - **'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 '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 'Submit 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 'CheckoutItems'**.

**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**



**Subscriber, Service and Location Details**

**Subscriber**

<b>Name</b> Elaine Hu	<b>Subscriber ID</b> 1618129	<b>User Defined ID</b> U1618129
<b>Group</b> AdminTel Internal	<b>Billing Cycle</b> AdminTel Internal	<b>Status As Of Date</b> 09-MAR-2007
<b>Status</b> Active	<b>Department Number</b> 1130	<b>Department Name</b> ENGIN COOP EDUC
<b>Department Number</b> 1130	<b>Department Name</b> ENGIN COOP EDUC	<b>Bill To Department</b> <input checked="" type="checkbox"/>
<b>Cost Center</b>	<b>Tax Status</b> None	
<b>Hierarchy Path</b>		

**Service**

<b>Service Number</b> 6048229643	<b>Service Type</b> Voice	<b>Switch</b> Cisco Server Rating
<b>Service Status</b> In Service	<b>Alert</b>	
<b>Switch Status</b> Imported	<b>Switch Address</b>	
<b>Service Start Date</b> 23-JUL-2012	<b>Service End Date</b>	
<b>Multi-line/Single</b> Multi-line	<b>Service Class</b> CTD (Conditionally Toll Denied)	
<b>Analog/Digital/IP</b> Digital	<b>Line Type</b>	
<b>E911 Class Of Svc</b>	<b>E911 Type Of Svc</b>	
<b>Location</b> 747 (PULP & PAPER CENTRE) / MAIN / 109 / VOIP		

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

**Change Service Wizard**

Other Information | Service Catalog | Work Or

Next > | Finish | Cancel

**Instructions**

**Subscriber**  
 Subscriber ID 1618129 User Defined ID U1618129  
 Name Elaine Hu Group AI (AdminTel Internal)

**Service Information**  
 Service Number 6048229643 Service Type Voice Switch Cisco Server Rating  
 Service Status In Service Alert  
 Switch Address  
 Location 747 (PULP & PAPER CENTRE) / MAIN / 109 / VOIP

**Other Information**  
 Project   
 Requested Date  MDT  
 Any more information

**Contact**  
 Select Existing Contact   
 Contact   
 First Name   
 Last Name

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'**.

Change Service Wizard

Other Information
Service Catalog

⚙️
?
< Prev
Next >
Finish
Cancel

**Name** Elaine HU      **Group** AI (Admin | Internal)

**Service Information**

**Service Number** 6048229643 **Service Type** Voice **Switch** Cisco Server Rating  
**Service Status** In Service      **Alert**  
**Switch Address**  
**Location** 747 (PULP & PAPER CENTRE) / MAIN / 109 / VOIP

**Service Catalog Selections**

1 - 25      Rows Per Page

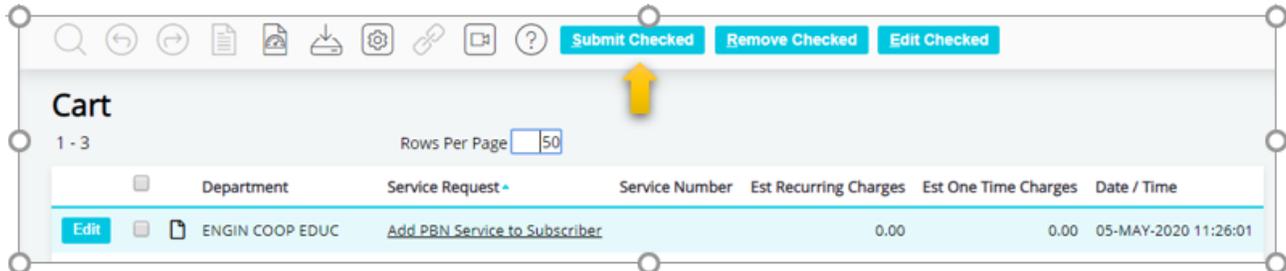
<input type="checkbox"/> Name	Description
<input type="checkbox"/> <a href="#">Internal: Add Telus Directory Listing</a>	Add a Telus Directory Listing to the Telus White Pages. Indicate in the c
<input type="checkbox"/> <a href="#">Internal: Add a CISCO Personal Directory</a>	Enable the Personal Directory on CISCO VoIP phones
<input type="checkbox"/> <a href="#">Internal: Change Phone Number</a>	Change the phone number, on an existing phoneset, to a new phone n
<input type="checkbox"/> <a href="#">Internal: Change Phone Set</a>	Please specify type of phone. For changing from any analog set type to
<input type="checkbox"/> <a href="#">Internal: Change Telus Directory Listing</a>	Change an existing Telus Directory Listing in the Telus White Pages. (pl
<input type="checkbox"/> <a href="#">Internal: Change a Toll Free Phone Service</a>	Change a toll free phone service. i.e. the terminating phone number or

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

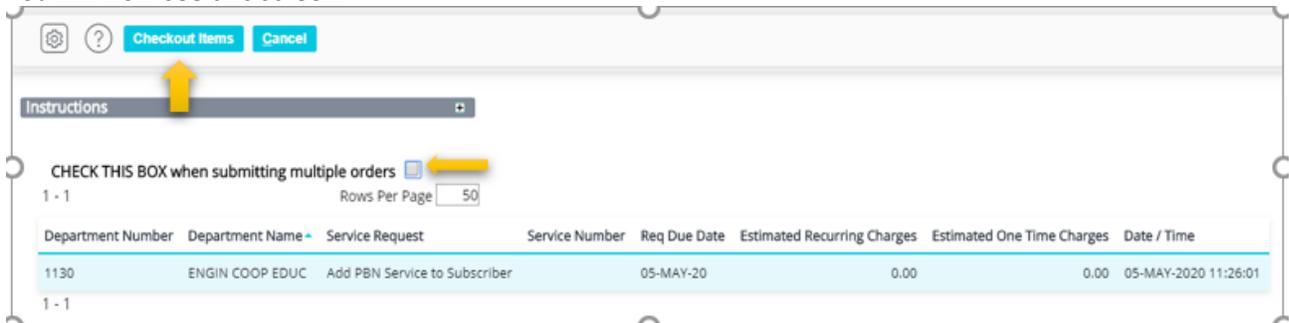
change. If you are done submitting orders, **click on 'Cart'** at the top of the screen.

You will now see this screen:



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

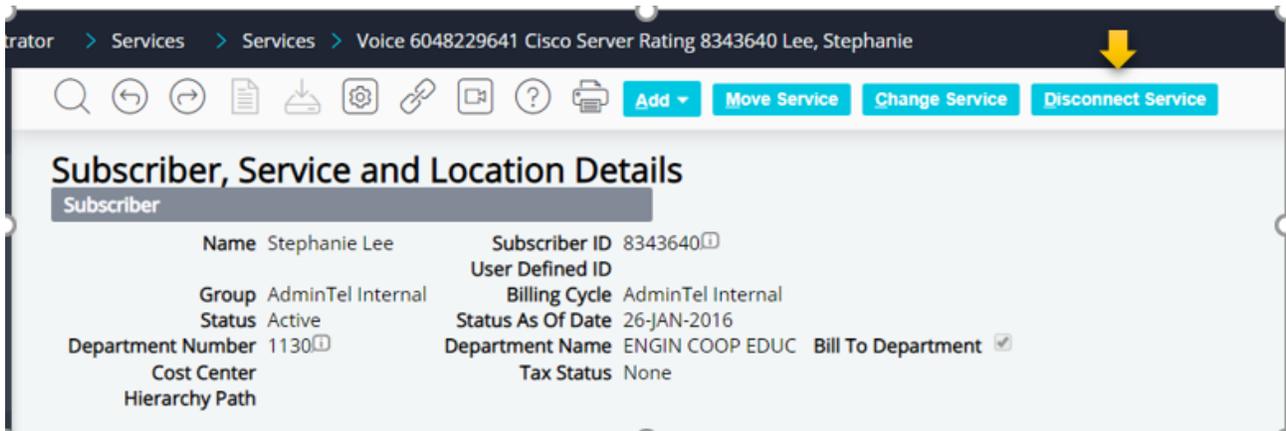
You will now see this screen:



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'.

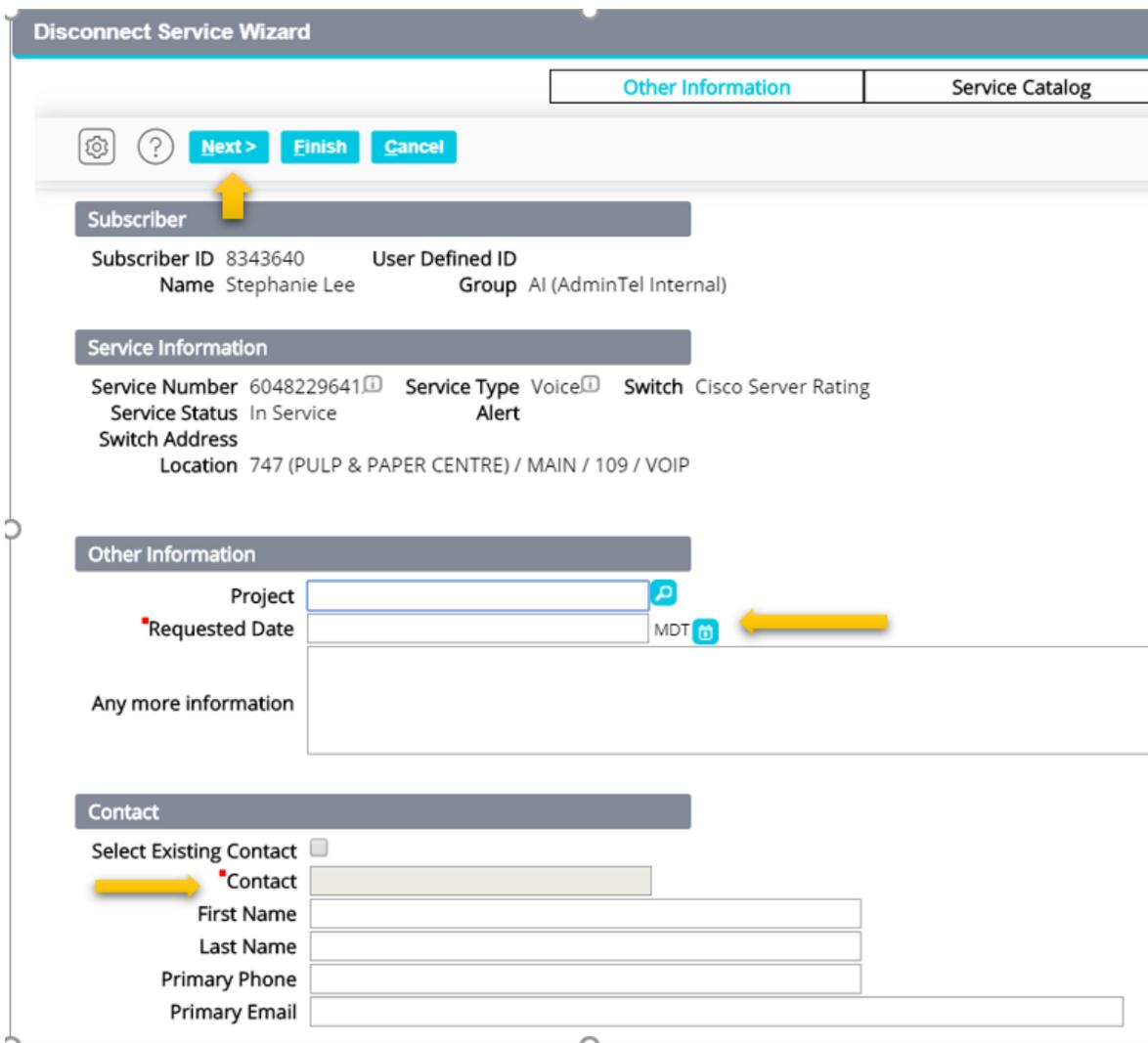
**Congratulations, you are done!** – [Click here to go back to Placing Phone Orders.](#)

## Disconnect a Service



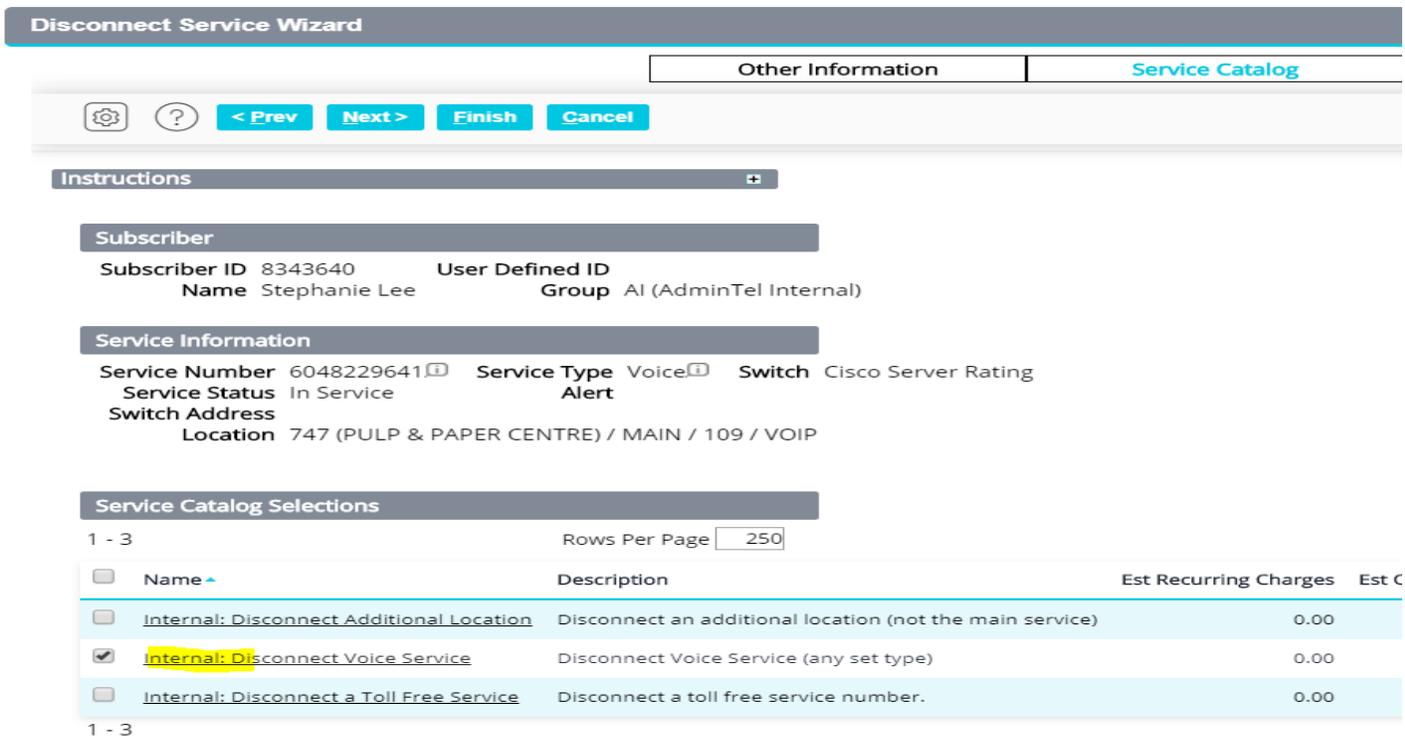
From this screen: **click on 'Disconnect Service'**.

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'**.



**Subscriber**

Subscriber ID 8343640      User Defined ID  
 Name Stephanie Lee      Group AI (AdminTel Internal)

**Service Information**

Service Number 6048229641      Service Type Voice      Switch Cisco Server Rating  
 Service Status In Service      Alert  
 Switch Address  
 Location 747 (PULP & PAPER CENTRE) / MAIN / 109 / VOIP

**Service Catalog Selections**

1 - 3      Rows Per Page 250

<input type="checkbox"/>	Name	Description	Est Recurring Charges	Est C
<input type="checkbox"/>	Internal: Disconnect Additional Location	Disconnect an additional location (not the main service)	0.00	
<input checked="" type="checkbox"/>	Internal: Disconnect Voice Service	Disconnect Voice Service (any set type)	0.00	
<input type="checkbox"/>	Internal: Disconnect a Toll Free Service	Disconnect a toll free service number.	0.00	

1 - 3

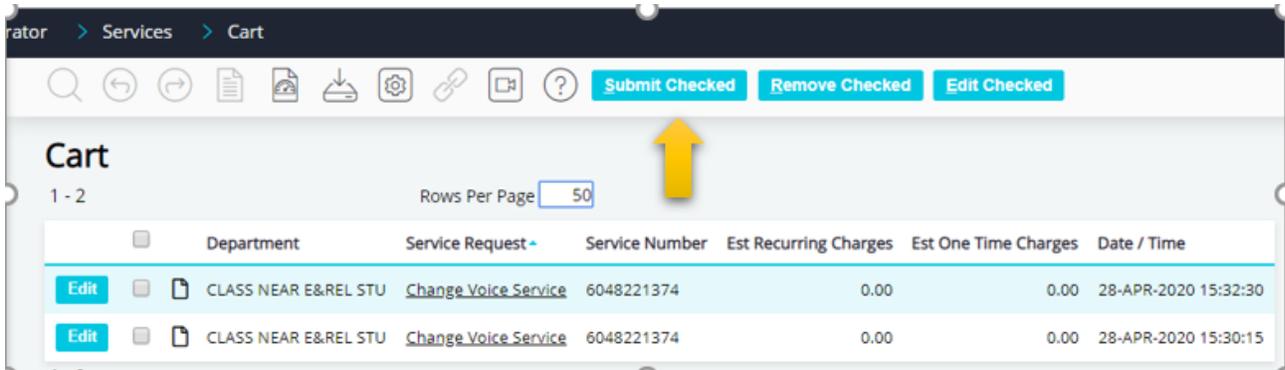
You will now see this screen:

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.

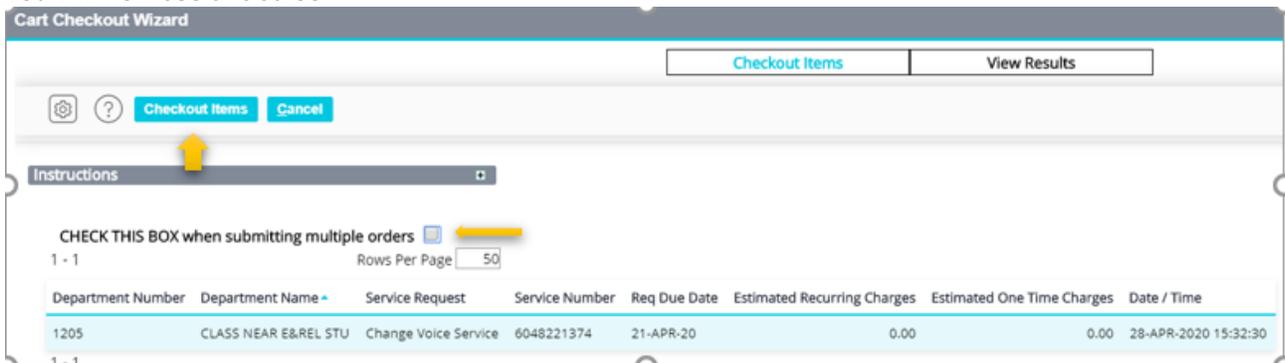
- If you have more orders to place, click on **'Services'** and search for the next service you wish to change. If you are done submitting orders, **click on 'Cart'** at the top of the screen.

You will now see this screen:



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

You will now see this screen:



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

**Congratulations, you are done!** – [Click here to go back to Placing Phone Orders.](#)

## Move a Line (or Report a VoIP Phone Move)

**Subscriber, Service and Location Details**

**Subscriber**

<b>Name</b>	Stephanie Lee	<b>Subscriber ID</b>	8343640
<b>Group</b>	AdminTel Internal	<b>User Defined ID</b>	
<b>Status</b>	Active	<b>Billing Cycle</b>	AdminTel Internal
<b>Department Number</b>	1130	<b>Status As Of Date</b>	26-JAN-2016
<b>Cost Center</b>		<b>Department Name</b>	ENGIN COOP EDUC
<b>Hierarchy Path</b>		<b>Bill To Department</b>	<input checked="" type="checkbox"/>
		<b>Tax Status</b>	None

**Service**

<b>Service Number</b>	6048229641	<b>Service Type</b>	Voice	<b>Switch</b>	Cisco Server Rating
<b>Service Status</b>	In Service		Alert		
<b>Switch Status</b>		<b>Switch Address</b>			
<b>Service Start Date</b>	26-JAN-2016	<b>Service End Date</b>			
<b>Multi-line/Single</b>		<b>Service Class</b>			
<b>Analog/Digital/IP</b>		<b>Line Type</b>			
<b>E911 Class Of Svc</b>		<b>E911 Type Of Svc</b>			
<b>Location</b>	747 (PULP & PAPER CENTRE) / MAIN / 109 / VOIP				

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

You will now see this screen:

**Move Service Wizard**

Other Information | New Location | Service Ca

Next > Cancel

Name E Line Hu Group AI (AdminTel Internal)

**Service Information**

<b>Service Number</b>	6048229643	<b>Service Type</b>	Voice	<b>Switch</b>	Cisco Server Rating
<b>Service Status</b>	In Service		Alert		
<b>Switch Address</b>					
<b>Location</b>	747 (PULP & PAPER CENTRE) / MAIN / 109 / VOIP				

**Other Information**

Project

Requested Date  MDT

Any more information

**Contact**

Select Existing Contact

Contact

First Name

Last Name

Primary Phone

Primary Email

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 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:

The screenshot shows the 'Move Service Wizard' interface. At the top, there are three tabs: 'Other Information', 'New Location' (which is selected), and 'Service Catalog'. Below the tabs are navigation buttons: '< Prev', 'Next >', 'Finish', and 'Cancel'. A yellow arrow points to the 'Next >' button. The main content area is divided into several sections:

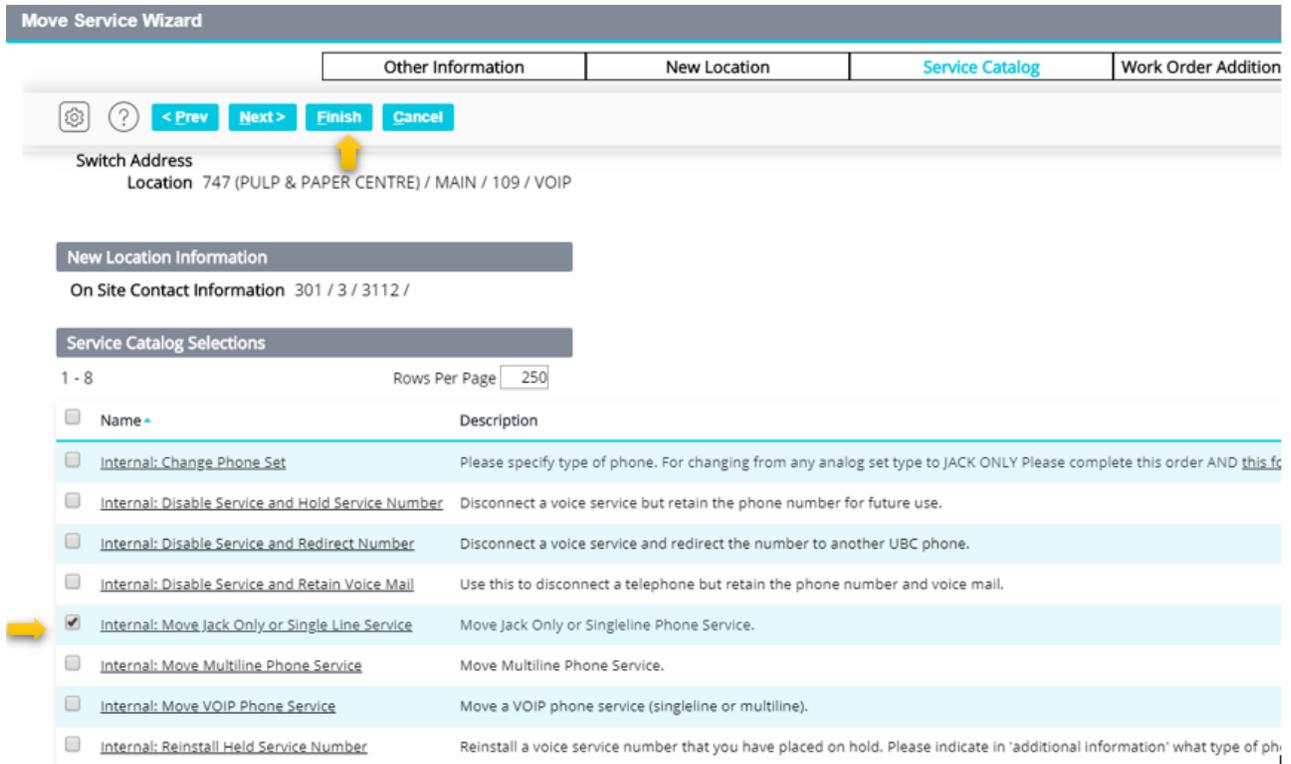
- Subscriber:** Subscriber ID 1618129, User Defined ID U1618129, Name Elaine Hu, Group AI (AdminTel Internal).
- Service Information:** Service Number 6048229643, Service Type Voice, Switch Cisco Server Rating, Service Status In Service, Alert, Switch Address Location 747 (PULP & PAPER CENTRE) / MAIN / 109 / VOIP.
- New Location Information:** This section contains input fields for 'Building Code', 'Floor', 'Room', and 'Jack'. A 'Building Name' field is also present. A yellow arrow points to the 'Building Code' field. Below these fields is a large text area for 'Other New Location Information', also indicated by a yellow arrow.

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

1. Enter the **'Building Code'**. 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:



**Move Service Wizard**

Other Information | New Location | **Service Catalog** | Work Order Addition

< Prev | **Next >** | Finish | Cancel

Switch Address  
 Location 747 (PULP & PAPER CENTRE) / MAIN / 109 / VOIP

**New Location Information**  
 On Site Contact Information 301 / 3 / 3112 /

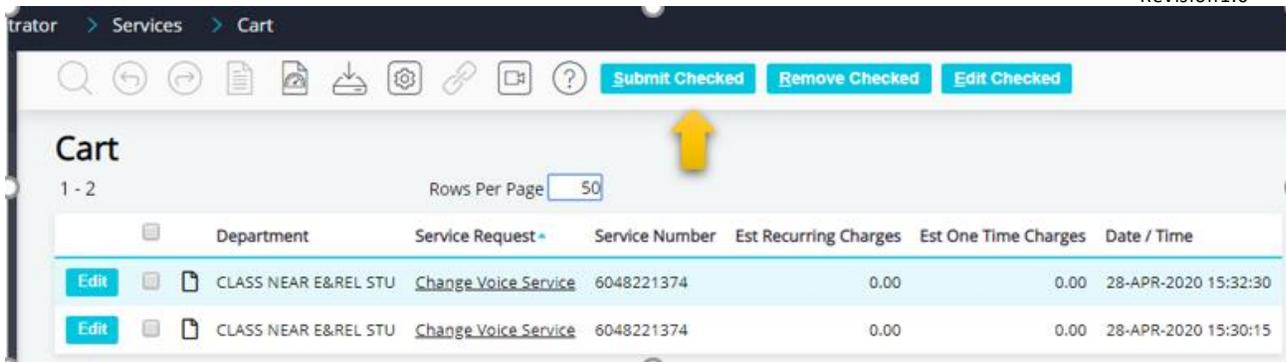
**Service Catalog Selections**  
 1 - 8 Rows Per Page 250

<input type="checkbox"/>	Name -	Description
<input type="checkbox"/>	<a href="#">Internal: Change Phone Set</a>	Please specify type of phone. For changing from any analog set type to JACK ONLY Please complete this order AND <a href="#">this fo</a>
<input type="checkbox"/>	<a href="#">Internal: Disable Service and Hold Service Number</a>	Disconnect a voice service but retain the phone number for future use.
<input type="checkbox"/>	<a href="#">Internal: Disable Service and Redirect Number</a>	Disconnect a voice service and redirect the number to another UBC phone.
<input type="checkbox"/>	<a href="#">Internal: Disable Service and Retain Voice Mail</a>	Use this to disconnect a telephone but retain the phone number and voice mail.
<input checked="" type="checkbox"/>	<a href="#">Internal: Move Jack Only or Single Line Service</a>	Move Jack Only or Singleline Phone Service.
<input type="checkbox"/>	<a href="#">Internal: Move Multiline Phone Service</a>	Move Multiline Phone Service.
<input type="checkbox"/>	<a href="#">Internal: Move VOIP Phone Service</a>	Move a VOIP phone service (singleline or multiline).
<input type="checkbox"/>	<a href="#">Internal: Reinstall Held Service Number</a>	Reinstall a voice service number that you have placed on hold. Please indicate in 'additional information' what type of ph

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.

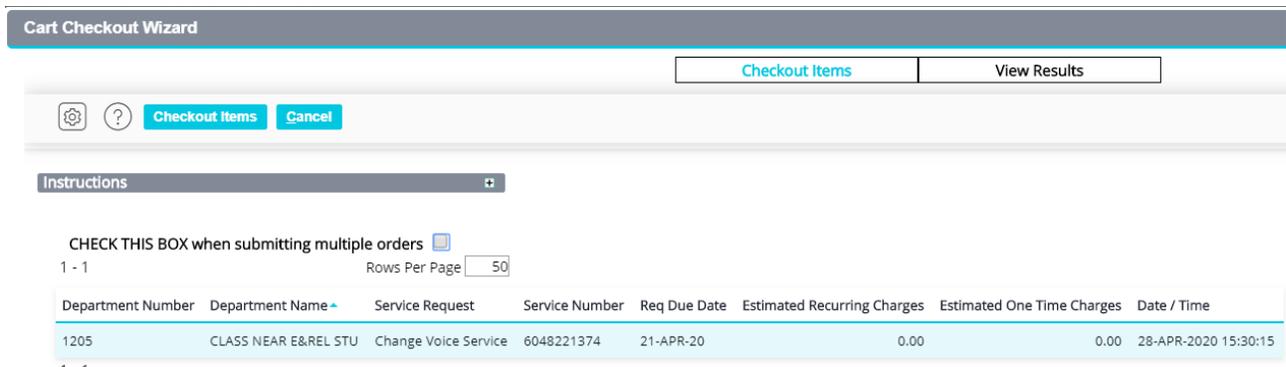
1. Place a check in the box next to:
  - a. **'Internal: Move Jack Only or Single Line Service'** to move a jack only or single line service.
  - b. **'Internal: Move Multiline Service'** to move a multi-line phone service.
  - c. **'Internal: Move VOIP Phone Service'** to report a VoIP phone set move.
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:



- Place a check in the box next to each order you wish to submit.
- Click 'Submit Checked'.

You will now see this screen:

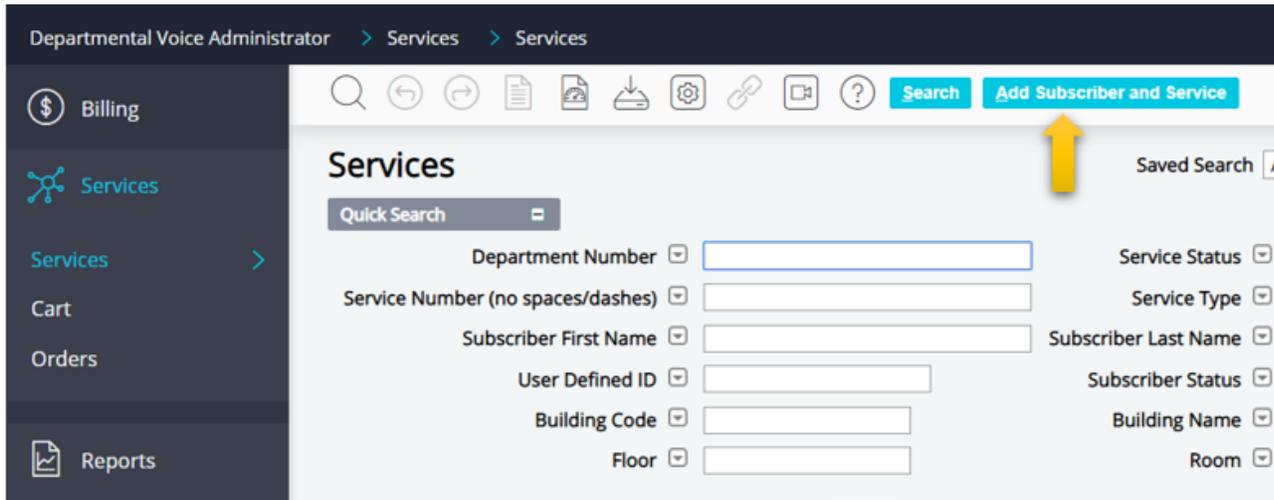


- If you have more than one order to submit, place a check in the box next to 'CHECK THIS BOX when submitting multiple orders'.
- Click on 'CheckoutItems'.

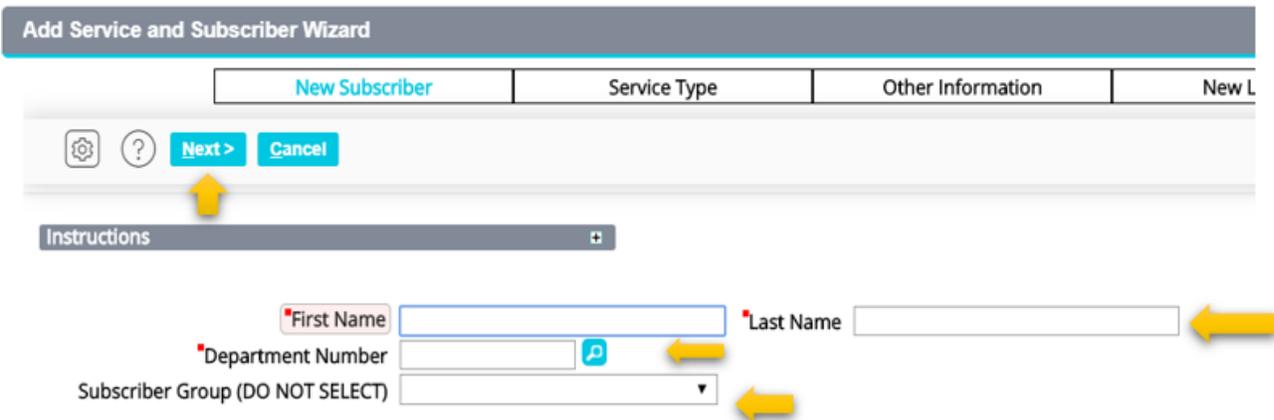
**Congratulations, you are done! – [Click here to go back to Placing Phone Orders.](#)**

## 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 (callid)
3. User Defined ID is optional and may be left blank, we recommend using the 7-digit phone



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:

**Add Service and Subscriber Wizard**

New Subscriber	Service Type	Other Information	New Location
Confirmation			

? < Prev Next > Finish Cancel

<input type="checkbox"/> Name	Description
<input type="checkbox"/> <a href="#">Internal: Add CISCO Personal Directory</a>	Enable the Personal Directory on CISCO VoIP phones.
<input type="checkbox"/> <a href="#">Internal: Add Telus Business (1B) Line or ISDN</a>	Install a Telus Business (1B) Line or ISDN. Charge will come from Telus and will be added to subscri
<input type="checkbox"/> <a href="#">Internal: Add Telus Directory Listing</a>	Add a Telus Directory Listing to the Telus White Pages. Indicate in the comments how you would like
<input type="checkbox"/> <a href="#">Internal: Add Toll Free Phone Number</a>	Add a toll free phone number. Please provide phone line that this toll free number will terminate c
<input type="checkbox"/> <a href="#">Internal: Add WiTel set to an existing service</a>	Add a WiTel set to an existing service. <a href="#">Click Here</a> to view details about the WiTel service.
<input type="checkbox"/> <a href="#">Internal: Add an Additional Location</a>	Add an additional location to an existing service. Monthly charges vary depending on type of phon
<input type="checkbox"/> <a href="#">Internal: Cisco VoIP Conference Phone</a>	Purchase a Cisco VoIP Conference Phone without additional speakers.
<input checked="" type="checkbox"/> <a href="#">Internal: Employee Basic Service</a>	Install a basic singleline phone for an employee, depending on availability and your location, this n
<input type="checkbox"/> <a href="#">Internal: Employee Enhanced Service</a>	Install a single line speaker phone for an employee, depending on availability and your location, th

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.

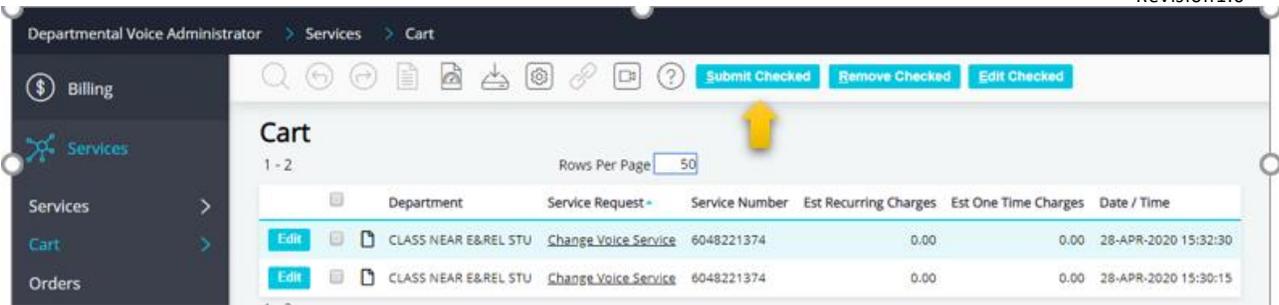
1. If you wish to order:
  - a. A new Basic Service for a regular UBC employee, place a check in the box next to **'Internal: Employee Basic Service'**.
  - b. A new Enhanced Service for a regular UBC employee, place a check in the box next to **'Internal: Employee Enhanced Service'**.
  - c. A new Multiline 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](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:

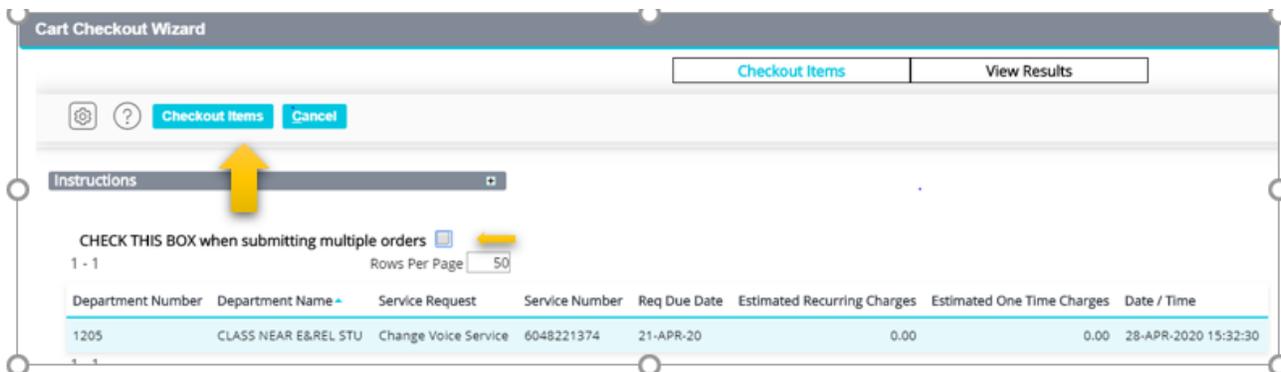
- New services require **Speedchart** information for billing. Please fill in (**all entries are required**):
  - 'MRC Speedchart' – Recurring charges
  - 'OCC Speedchart' – One time charges
  - 'Long Dist Y/N?' – Should outgoing long distance be allowed, Y/N?
  - 'Toll Speedchart' – Long distance charges
  - '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 '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 'Submit 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.](#)