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Logging In

On the web, using Mozilla Firefox, at url: IT.UNH.EDU, scroll over to the menu to Telephones; next select Telecom Account Access in the list of displayed choices.

Select Telecom Account Access in the displayed choices.
On the **Telecom Account Access** screen, select **Login to your Department Account**

Note: The **User Name** and **Password** at the **PINNACLE** LOGIN screen is your UNH User Name (UNH IT ID) and password. If you have a problem using your UNH IT ID and you have confirmed with **Telecom** you have authorized access to the Telecommunications Department Online Account Access, please called 2-4242 or get [Help with your Username](https://IT.UNH.EDU) from IT.UNH.EDU.
Select Menu

Select **Services** menu

Select tab **Services**

Select Interactive Reporting icon

Screen automatically reports columns and services
**Rows** displayed automatically on screen is 15

Select **drop down arrow** and select the number of rows you want to see displayed on screen.
Reporting Options

**Gear drop down arrow** – use to view report options.

**Select Columns** – information displayed on report.

**Filter** – what items do you want reported or do not want reported.

**Save Report** - presents Name field to save a name to the report created with the ability to recall the named report for future use.

**Download** - presents ability to save report results to your computer for further use, such as analysis.
Create a Service Interactive Report

The **Gear drop down arrow** is used to select reporting options. For this report we will use the reporting options: **Select Columns**, **Filter**, **Save Report**, and **Download**. We want to know who have active **Authorization Codes** (Long Distance Authorization Code).

**Assign Filters**

The assigned filters used in this will report will be assigned_end_date is null (blank field) and Service_Type_Code is Authorization Code.

![DEPT SVC SUB LOC](image)

**Add First Filter**

Select **Gear drop down arrow**, Select **Filter**
Select the **Column**, using the **Gear drop down arrow, Service_Type_Code**. In the Column field you may start typing **serv** and the selection will bring you to the closest column name to the information you began typing.

![Filter](image)

Select the **Operator**

![Operator](image)

Two Operators used in this report:

- equals
- is null which means the field does not contain any information

Note: the Operator **in** allows you to select more than one expression
Select Expression using drop down arrow – find and select **Authorization Code** and select **Apply**. By selecting **Apply**, you accept the filter you’ve created in the report.

Add Second Filter

Select **Filter**, select column **ASSIGN_END_DATE**, select Operator **is null**, select **Apply**.

Report Filters
Select Columns to Display in Report

After adding filters, the report contains all columns automatically.

Selecting Gear drop down arrow, 🛠️

Select Columns by highlighting column, selecting left or right arrows to move or remove columns from Do Not Display and Display in Report.
Explanation of Arrows

**Arrows** pointing to the left will add the highlighted column removes columns to **Do Not Display in Report**. A single arrow pointing left moves highlight column(s) to the left; a single arrow pointing right moves highlighted column(s) to the right. Double arrows redirect all columns either to the left – **Do Not Display** or to the right – **Display in Report**.

![Arrows pointing left and right](image)

**Arrows** pointing up or down indicates selected column moved up or down in the displayed position in the report. An Arrow with the line at the top or bottom moves the selected field to the first position or last position of the displayed report.

![Arrows pointing up and down](image)
Recommended report columns

Subscriber_ID, First_name, Last_name, Department_Number, Service_Type_Code, Service_Number, Assigned_Start_Date, Building_Code, Building_Name, Floor_name, Room_name, Jack_name

Screen shot below show columns selected to Display in Report.
Note Report Results

If satisfied with columns and report information, save this report for future use.

Save Report to Recall Later

The information in report is real-time information from the database.

Select **Gear drop down arrow**, 

Select report option **Save Report**
Under Save Report – enter a **Name** and select **Apply** to save.

After saving the report, note the new report Tabs

At this point, you could log out of the application, log back in, find your report under menu **Services, Services** tab and select the **Interactive Reporting** icon.

The Working Report tab will have no filters assigned after logging out.
Downloading report as output

Select **Gear drop down arrow**, ☀️

Select **Download** in report option. You may need to use scroll bar and/or enlarge screen to see Download choice which is the last option in Report Options.

At Download screen, select Excel looking icon down arrow CSV
In the **Opening_interactive_report.csv** dialog box – Select **Open with Microsoft Excel** and select **OK**.
Excel will open with the name **interactive_report.csv**. If you place your cursor above row 1 and before Column A then move your cursor between rows B and C changing the cursor to double headed arrow, you can expand all column 1 headers.

On the open Excel csv report, select **File, Save As** – note file path saving location. Change location if necessary.

```
Computer ➤ Win7 (C:) ➤ Users ➤ kjc ➤ Desktop ➤
```

**Next, Save as Type**: select Excel Workbook (.xls, .xlsx) and enter a **File Name**
Select Save

```
File name: Authorization Codes Active
Save as type: Excel Workbook (*.xlsx)
```

Authors: Jaus, Kaye
Tags: Add a tag
Title: Add a title

Save Thumbnail

Tools

Save
Create a different report from existing report

Select **Authorization Code** report

Select **Gear box drop down**,

Select **Save Report** type a **new name**

New report name

Select **Apply**
On the report you just created

Select **Service_Type_Code**, change **Operator** from = to in

Next in **Expression** field delete Authorization Code by backspacing or highlighting and hitting delete. Then using the dropdown Expression arrow, select Ethernet, select Voice and click cursor to close drop down Expression selection.

Select **Apply**
Note new report tab and filter change.

Apply the new filter to the report Voice-Ethernet by

Selecting the Gear drop down arrow, 🔄

Select reporting option Save Report

Select Apply
Creating a Recurring Charges Interactive Report

For this report we will use the reporting options: Select Columns, Filter, Save Report, and Download. We want to know to know the active recurring charge code, the charge name, the service number assigned to the charge, the assigned entity, the subscriber id used to track the charge, the location if a location exists, the expense account, and the recurring amount.

Select Department Billing menu

Select tab Recurring Charges

Select Interactive Reporting icon

Screen automatically reports columns and services
Select Filter

Select the **Gear drop down arrow** and select Filter.

![Gear drop down arrow](image)

The assigned filter for this will report will be **Remove Date** is null (null means blank).

Select the **Column**, using the **Gear drop down arrow**, start typing **Remove** accept **Remove Date** and the Operator is null (blank) and select **Apply**. In the Column field you may start typing **remove** and the selection will bring you to the closest column name to the information you began typing.

![Filter](image)
Select Columns to Display in Report

Select **Gear drop down arrow**, [Image]

**Select Columns** to be displayed in report.

![Select Columns](Image)
Send all columns to **Do Not Display** by selecting **double arrows to the left**

```
<table>
<thead>
<tr>
<th>Do Not Display</th>
<th>Display in Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>RECURRING_CHARGE_ID</td>
<td></td>
</tr>
<tr>
<td>CHARGE_CODE</td>
<td></td>
</tr>
<tr>
<td>RECURRING_TOTAL</td>
<td></td>
</tr>
<tr>
<td>ASSIGN_DATE</td>
<td></td>
</tr>
<tr>
<td>DEPARTMENT_NUMBER</td>
<td></td>
</tr>
<tr>
<td>DEPARTMENT_ID</td>
<td></td>
</tr>
<tr>
<td>EXPENSE_ACCOUNT_NUMBER</td>
<td></td>
</tr>
<tr>
<td>SERVICE_NUMBER</td>
<td></td>
</tr>
<tr>
<td>DISPLAY_LOCATION</td>
<td></td>
</tr>
<tr>
<td>USER_DEFINED_ID</td>
<td></td>
</tr>
<tr>
<td>LIST_DISPLAY_NAME</td>
<td></td>
</tr>
<tr>
<td>ACTIVE</td>
<td></td>
</tr>
<tr>
<td>Subscriber Id</td>
<td></td>
</tr>
<tr>
<td>Charge Name</td>
<td></td>
</tr>
<tr>
<td>Recurring Charge Name</td>
<td></td>
</tr>
<tr>
<td>Display Charge Name</td>
<td></td>
</tr>
<tr>
<td>Custom Charge Code</td>
<td></td>
</tr>
<tr>
<td>Quantity</td>
<td></td>
</tr>
<tr>
<td>Recurring Amount</td>
<td></td>
</tr>
<tr>
<td>Assign Prorate</td>
<td></td>
</tr>
</tbody>
</table>
```
Place cursor inside Do not Display and click to highlight column to display in report then select single arrow to right. This report display Department_Number, Subscriber_id, List_Display_name, Service_Number, Expense_account_number, Assign_Date, Charge_Code, Charge Name, Display Charge Name, Quantity, Recurring Amount, and Recurring_total. We also want to move the columns to the location we want to see them in the report by using the up and down arrows. Finally, select **Apply**.

Report displayed information
Save Report for future reference.

Select Columns

Filter

Sort

Control Break

Highlight

Compute

Aggregate

Chart

Save Report

Reset

Help

Download

Name: Recurring
Saving csv as Excel
Note the file saved location, File Name and Save as Type when saving your download.