

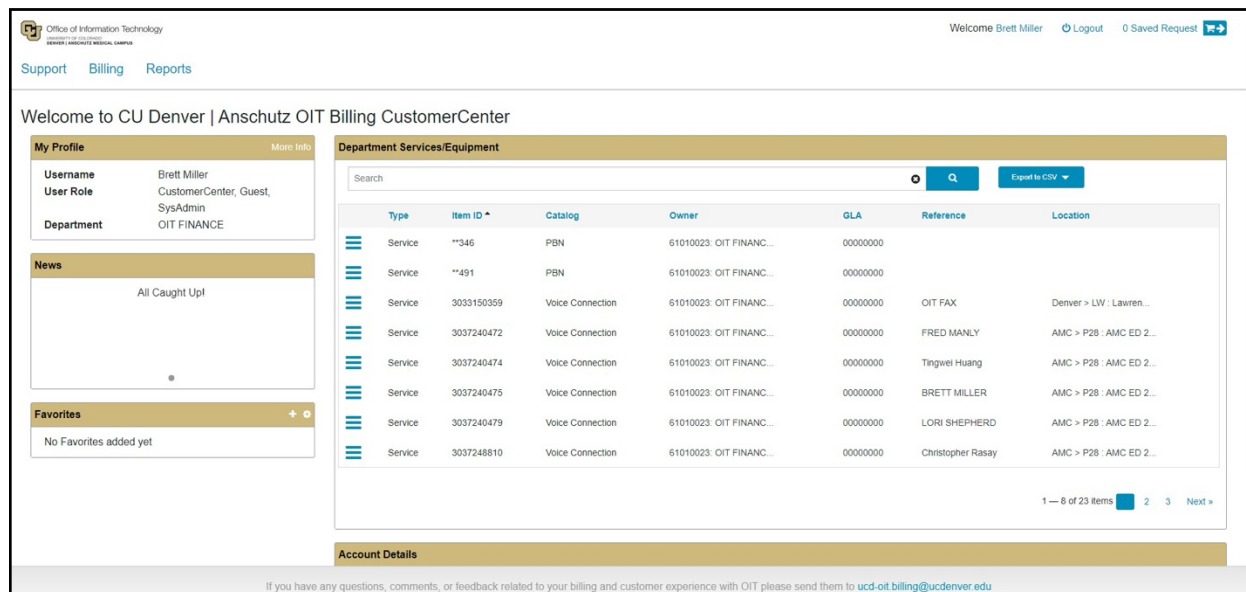
How-to-Guide: Using the ISS Billing Customer Center

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Accessing the Customer Center

1. Navigate to <http://billing.oit.ucdenver.edu/cc>
2. Enter your CU credentials when prompted by the CU Denver | Anschutz Web Login
3. The Customer Center home page can always be accessed by clicking the CU logo in the top-left corner



The screenshot shows the CU Denver | Anschutz OIT Billing Customer Center interface. The top navigation bar includes links for Support, Billing, and Reports. The main content area is divided into several sections:

- My Profile:** Displays user information for Brett Miller, including Username, User Role (CustomerCenter, Guest, SysAdmin), and Department (OIT FINANCE).
- News:** A section titled "All Caught Up!" with a placeholder for news items.
- Favorites:** A section titled "No Favorites added yet" with a placeholder for favorite items.
- Department Services/Equipment:** A table listing services and equipment. The table has columns for Type, Item ID, Catalog, Owner, GLA, Reference, and Location. It shows a list of services, including PBN, Voice Connection, and various equipment items.
- Account Details:** A section at the bottom of the main content area.

The bottom of the page includes a footer with contact information: "If you have any questions, comments, or feedback related to your billing and customer experience with OIT please send them to ucd-oit.billing@ucdenver.edu".

Viewing and Changing the Services in your Department

In the “Department Services/Equipment” widget you can view the active services for every SpeedType where you are designated as a coordinator.

- You can navigate through the list using the page numbers in the bottom right
- You can export the entire list to a csv using the “Export to CSV” button in the top right
- You can submit requests for individual services (see below):

Type	Item ID	Catalog	Owner	GLA	Reference	Location
Service	""346	PBN	61010023: OIT FINANC...	00000000		
Service	""491	PBN	61010023: OIT FINANC...	00000000		
Service	3033150359	Phone Line with a Handset Installed	61010023: OIT FINANC...	00000000	OIT FAX	LW : Lawrence Street...
Service	3037240472	Phone Line with a Handset Installed	61010023: OIT FINANC...	00000000	Fred Manly	P28 : AMC ED 2 North...
Service	3037240474	Phone Line with a Handset Installed	61010023: OIT FINANC...	00000000	Tingwei Huang	P28 : AMC ED 2 North...
Service	3037240475	Phone Line with a Handset Installed	61010023: OIT FINANC...	00000000	Brett Miller	P28 : AMC ED 2 North...
Service	3037240479	Phone Line with a Handset Installed	61010023: OIT FINANC...	00000000	Lori Shepherd	P28 : AMC ED 2 North...
Service	3037248810	Phone Line with a Handset Installed	61010023: OIT FINANC...	00000000	Christopher Rasay	P28 : AMC ED 2 North...

1. To begin a SpeedType Change Request or a Name Change Request for an individual service click on the blue hamburger icon on the far left for the service that you are trying to change
 - a. You can use the search bar at the top to filter your services using any keywords in the Department Services/Equipment table. E.g. search for “Voice” to see all voice services, a SpeedType to view all services under a specific SpeedType/Department, someone’s name to find their phone or pager service(s), etc.
2. Choose either SpeedType Change or Name Change from the menu that pops up to the left
3. Click “Create New Request” from the new menu that pops up
4. Click the “Saved Request” link in the top right of the screen (not shown in screenshot) to begin filling out the request
5. Proceed to the corresponding instructions below for the request that was chosen

Service Request – SpeedType Change

1. In the “Owner” field enter the current SpeedType for the Service OR use the magnifying glass to search for the current SpeedType for this service; there should only be 1 option available
2. The “Account” field should auto-populate with the current SpeedType for the service. If it does not then you must enter the current service SpeedType as you did in the owner field
3. Enter a short description identifying the new SpeedType for the service
4. Check the checkbox in the request header
5. Click the “Submit Selected Requests” button at the top of the page to submit the request
6. You will be redirected to a screen showing proof of your request submission
7. You can click the CU Logo in the top-left corner to go back to the home screen
8. If you want to check on the status of any outstanding requests, or view/search your request history there is a Menu option titled “Requests” in the top-left hand corner (under the logo) where you can view this information

The screenshot shows a web interface for submitting a service request. At the top, there are two buttons: "Submit Selected Requests" (green) and "Delete Selected Requests" (orange). A search bar labeled "Search Requests" is on the right. Below these, a request header shows a checked checkbox, the title "test ST change request", and a pencil icon for editing. The "Created Date" is "December 17th, 2021". The form fields are as follows:

- Urgency:** Low (dropdown)
- Who Owns This?:** Department (dropdown)
- Owner:** 61010023: OIT FINANCE (text field with a magnifying glass icon)
- Account:** 61010023 (text field)
- Description:** test ST change to 61001095 (text field)

Below the form is a section titled "Services (1)" with a dropdown arrow. At the bottom, there is a dashed box for attachments with the text "Drag Your Attachment Here or Click to upload" and a section for "New Charges" showing "Onetime: \$0.00" and "Recurring: \$0.00".

Numbered callouts in the image:

- 1: Points to the Owner field.
- 2: Points to the Account field.
- 3: Points to the Description field.
- 4: Points to the checkbox in the request header.
- 5: Points to the "Submit Selected Requests" button.

Additional Information:

- You can name the request by clicking the pencil icon in the header of each request
- You can delete a request by selecting the request (checkbox) and clicking the “Delete Selected Requests” button at the top of the page

Service Request – Name Change (Phone or Pager Services ONLY)

1. In the “Description” field enter the new name, as well as any clarifying details for the request:

The screenshot shows a web form for submitting a service request. At the top, there are two buttons: "Submit Selected Requests" (green) and "Delete Selected Requests" (orange). Below these is a search bar labeled "Search Requests". The main form area is titled "Request 1" and includes a checkbox to select the request. The form fields are: "Urgency" (set to Low), "Who Owns This?" (set to Department), "Owner" (set to P), "Account" (set to P), and "Description" (set to change name to test miller). The "Description" field is highlighted with a red box and labeled with a red "1". Below the form fields is a section for "Services (1)" with a dropdown arrow. At the bottom, there is a section for "New Charges" with "Onetime: \$0.00" and "Recurring: \$0.00".

2. Check the checkbox in the request header
3. Click the “Submit Selected Requests” button at the top of the page to submit the request
4. You will be redirected to a screen showing proof of your request submission
5. You can click the CU Logo in the top-left corner to go back to the home screen
6. If you want to check on the status of any outstanding requests, or view/search your request history there is a Menu option titled “Requests” in the top-left hand corner (under the logo) where you can see this information

Additional Information:

- You can name the request by clicking the pencil icon in the header of each request
- You can delete a request by selecting the request (checkbox) and clicking the “Delete Selected Requests” button at the top of the page

Submitting a Request for Many Changes via a File

If you are wanting to submit many changes at once (whether they are SpeedType changes, name changes, or both) it may be easiest to do so using the “Mass Change Request” form. You can access this form by clicking the “Support” heading in the top-left of the home page, then choose “Mass Change Request” from the drop-down list.

The screenshot shows the 'Mass Change Request' form in the Office of Information Technology portal. The form is titled 'Mass Change Request' and has a 'General Request' section. It includes a 'Subject' field (1) with the text 'change everything on 61010023 to 61001096', a 'Topic' dropdown menu (2) set to 'General Inquiry', and a 'Request Details' section (3) with the text 'see attached file'. Below these is an 'Optional Information' section with a file upload area (4) labeled 'Drag Your Attachment Here or Click to upload'. At the bottom, there are two buttons: 'Cancel' and 'Submit' (5), with a red arrow pointing to the 'Submit' button. The top of the page shows the user is logged in as 'Brett Miller' and has a 'Saved Request' button.

1. Enter a subject line summarizing the request
2. Leave the “Topic” as the default option (General Inquiry)
3. Enter any additional or clarifying information into the “Request Details” section
4. Attach an excel or pdf file that notates all requested changes
5. Click the “Submit” button to submit the request

Tracking Requests

To view/edit any submitted requests click the “Requests” header in the top-left of the home screen, then select “Request Tracking” from the drop-down menu. You will arrive at a screen that looks like this:

The screenshot shows the 'Request Tracking' page. At the top, there's a navigation bar with 'Support', 'Requests', 'Billing', and 'Reports'. The 'Requests' section is active. Below the navigation bar, the page title is 'Request Tracking'. There's a search bar with a magnifying glass icon and a button labeled 'Export to CSV'. Below the search bar, there are two tabs: 'Service Orders / Requests' (with a count of 1) and 'Incidents' (with a count of 0). The main content area displays a table with the following data:

Number	Type	Status	Items	Urgency	Description	Submitted Date	Approved/Denied
SR202100126	Service Request	Pending	001: Owner [3037240475 - Voice (Basic)]	Low	test ST change to 61001095		

At the bottom right of the table, there is a pagination control showing '1 — 1 of 1 items' and a blue button with a right arrow.

If a request has been completed the “Status” will change from “Pending” to “Completed”. You can drill into your request by clicking the row. When drilled into an individual request you can also cancel it by clicking the “Cancel Request” button in the top-right of the screen

Viewing Your Bill

To view your bill(s) click the “Billing” header in the top-left of the home screen, then select “View Bill” from the drop-down menu. You will arrive at a screen that looks like this:

The screenshot shows the 'View Bill' interface for the Office of Information Technology at the University of Colorado Denver | Anschutz Medical Campus. The date is 12/17/2021 13:12:51. There are three main filter sections: 'Bill Date Range' (October 16, 2021 - November 15, 2021), 'View bill by' (Charge Account), and 'Charge Account' (All). A 'Total Bill Amount' of \$924.27 is displayed. Below the filters are two tables: 'Charge Summary' and 'Charge Accounts'.

Charge Type	Quantity	Total
Physical Servers (Physical Servers)	43	\$197.77
Software Licenses (Software Licenses)	1	\$45.00
Voice (Voice)	29	\$681.50
Total		\$924.27

Account	Description	Total
61001095	OIT ADMINISTRATION	\$754.83
61010023	OIT FINANCE	\$169.44
Total		\$924.27

1. Use the “Bill Date Range” to select the month for which you want to view a bill.
2. Use the “View bill by” drop-down to select from 1 of 3 different views for your bill:
 - a. **“Charge Account” is the default view**, and the most similar to how statements have traditionally been presented. “Charge Account” refers to the SpeedType for charges. This view shows all charges that have been billed to the SpeedTypes that you have access to.
 - b. **“Owner”** is a similar view to “Charge Account”, albeit slightly different. An Owner in PCR-360 appears as SpeedType, but is more a departmental representation of a SpeedType. Services are assigned to Owners in the system, however, a charge (usually a phone move or change) can be billed to a SpeedType that is different from the Owner. You would use this drop-down option if you wish to view charges for services under one/all of the departmental owners that you have access to.
 - c. **“Billing Group”** refers to one of 3 entities: CU AMC | Denver, CU Medicine, or University of Colorado Hospital. If you manage SpeedTypes (or Cost Centers) that belong to more than one of these entities then you could use this option to separate the billing information accordingly.
3. The third drop-down menu will change based on what you selected in the “View bill by” drop- down in the previous step. If you are viewing by “Charge Account” then you can either view all SpeedTypes that you manage or you can enter/select a specific SpeedType from the “Charge Account” drop-down. The same goes for viewing by Owner and Billing Group. Use this drop- down to filter by individual owner/billing

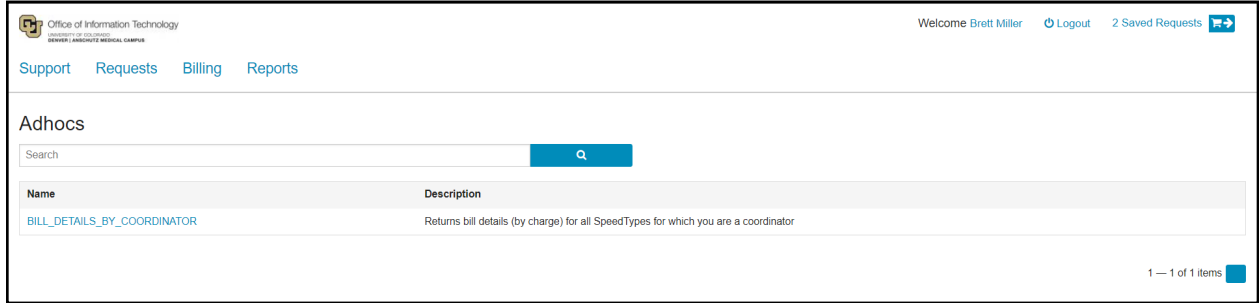
group.

Additional Information:

- You can export the bill to PDF or CSV using the buttons in the top-right of the screen

Ad Hoc Reporting

To view/download ad hoc reports that are available to you, click the “Reports” header in the top-left of the home screen, then select “Adhocs” from the drop-down menu. You will arrive at a screen that looks like this:



The screenshot shows a web application interface for the Office of Information Technology. The header includes the OIT logo, navigation links for Support, Requests, Billing, and Reports, and user information: Welcome Brett Miller, Logout, and 2 Saved Requests. The main section is titled 'Adhocs' and contains a search bar. Below the search bar is a table with one row. The table has two columns: Name and Description. The row contains the text 'BILL_DETAILS_BY_COORDINATOR' and 'Returns bill details (by charge) for all SpeedTypes for which you are a coordinator'. At the bottom right, it says '1 — 1 of 1 items'.

Name	Description
BILL_DETAILS_BY_COORDINATOR	Returns bill details (by charge) for all SpeedTypes for which you are a coordinator

All coordinators should have access to the report shown above:

BILL_DETAILS_BY_COORDINATOR. This report is most similar to the excel document that has traditionally been provided as part of the billing statement email. **NOTE:** The data in this report will only be from the most recent bill. If you require more comprehensive data then you will need to submit a request for a new ad hoc report, or we can provide the data to you outside of the reporting functionality in PCR-360.

If you have requested any additional ad hoc reports from OIT Billing then those would also show up in this list once the request has been fulfilled. Clicking on the link to the report will provide a table with the results and an option to download the report as a csv. You can also search for keywords in the report.