Contents

Overview

WaTech uses Apptio to provide customers with summary and detailed reports on billed services. While we can't create custom reports for each customer, your feedback helps us improve existing reports and develop useful new ones.

Providing feedback

Submit feedback, requests, or suggestions through the WaTech Support Center at: support@watech.wa.gov (Ask for routing to the WaTech Billing Group)

System Availability

Apptio is available **24/7**, except for occasional weekend maintenance. We notify users of planned changes **one week in advance**.

If Apptio is unexpectedly unavailable and no maintenance notice was issued, report the issue to the **WaTech Support Center** at: support@watech.wa.gov.

System Requirements

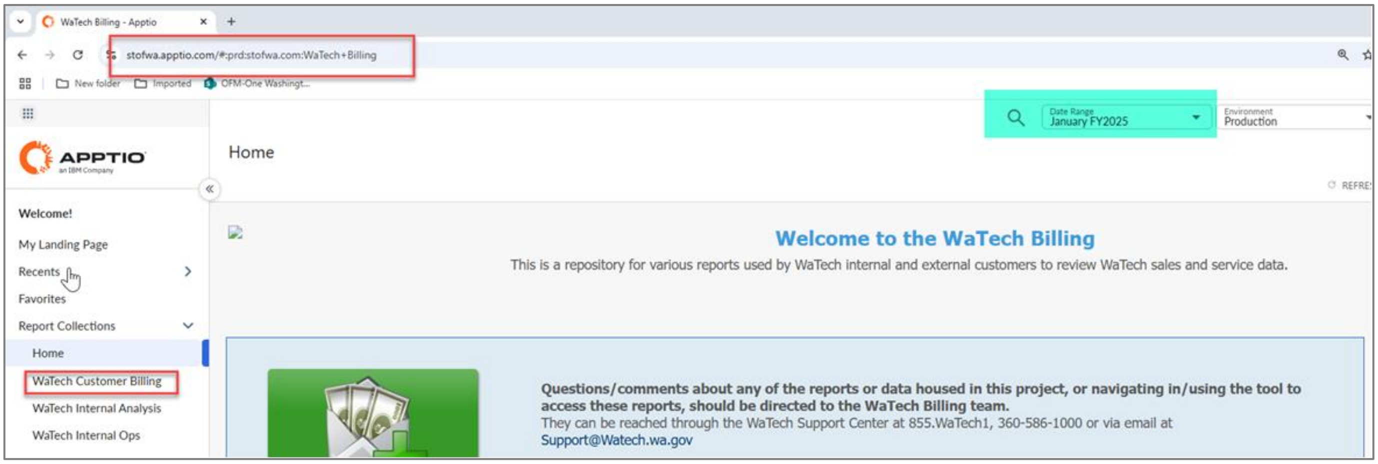
To use Apptio, you need:

- ✓ **An internet connection**
- ✓ **A supported browser** (Chrome, Edge, Firefox; some configurations may be required)
- ✓ **A valid Apptio URL**
- ✓ **A user ID**

Logging In to Apptio

1. **Access the login page**: https://stofwa.apptio.com/#:prd:stofwa.com:WaTech+Billing
2. **Enter your email** (this is your username).
3. **Authenticate**:
    - **Single Sign-On users**: Select your authentication method via **Active Directory**.
    - **Non-Single Sign-On users**: Enter your email and password.

Navigating Apptio Reports



Selecting a Product

- WaTech customers should select **WaTech Billing** for detailed billing reports.
- Once selected, Apptio will remember your choice.

Finding Reports

- Reports are categorized by business needs on the **WaTech Billing homepage**.
- Monthly billing data is available **within three business days** after the first workday of the month.

Selecting a Date Range

- Apptio uses **fiscal years** (not calendar years).
- To view a specific period, use the **drop-down menu** next to the Home field.
- Example: **September FY2018 = 09/01/2017 – 09/30/2017**
  - **Jan–June**: Calendar year = Fiscal year
  - **July–Dec**: Calendar year = Fiscal year - 1

✓ **Check the calendar settings each time you use Apptio** to ensure accurate data.

Using Reports in Apptio

Navigating Reports

- Click on a **report name** to open it.
- The **active report** is highlighted with an **orange line**.

Viewing More Reports

- If your screen limits the number of reports displayed, use the **dropdown menu** to see additional options.

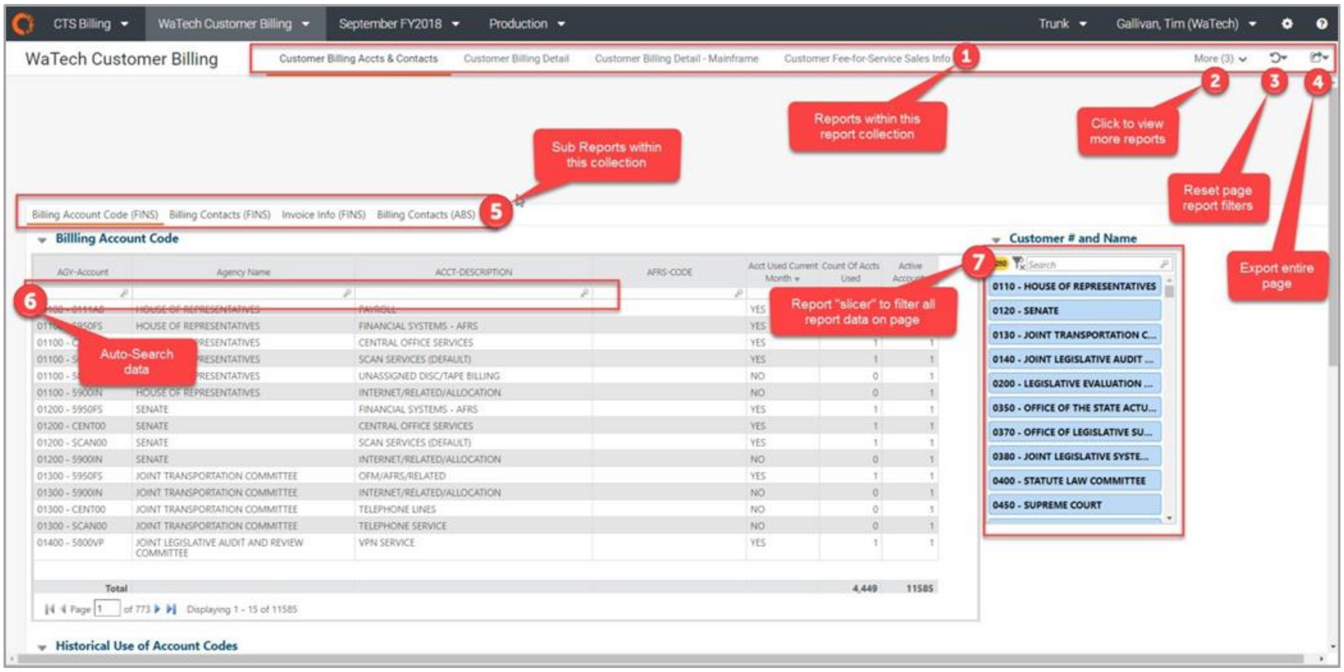
Filtering Data

- Reset all filters using the **"Clear Filters"** option.
- Use **Slicers** to filter data by category (e.g., date, department).
- Select multiple values with **Shift + Click** (for a range) or **Ctrl + Click** (for individual selections).

Sorting and Searching Data

- Click a **column header** to sort data.
- Use **"Show Unique Values"** to see distinct entries.
- Use **!BLANK or !phrase** to filter out data.
- Use **=phrase** to filter for specific case-sensitive values.

Exporting and Sharing Reports



- **Export data to Excel** or email reports to others.
- Use the **filtering options** before exporting to limit large data sets.
- Reports with multiple sub-reports will be exported as separate tabs in Excel.

Navigating and Using Apptio Reports

Viewing Reports

After selecting a report collection (e.g., WaTech Customer Billing), the application toolbar displays all available reports. Click on a report name to open it. The active report is highlighted with an orange line under the title.

Viewing Additional Reports ("More" Option)

Depending on your screen size, not all reports may be visible at once. A dropdown menu will indicate how many additional reports are available within the collection.

Filtering and Exporting Data

Resetting Filters

Use the Clear Filters option in the dropdown menu to remove all applied filters and reset the page view.

Exporting Data

- Download report data in Excel format or send it via email.
- Since reports may contain large datasets, use filters before exporting to refine results.

Sub-Reports and Navigation

Using Sub-Reports (Tabs)

- Some reports contain sub-reports for viewing related data within a single page.
- Navigate between sub-reports by clicking the tabs at the top.
- The active sub-report is highlighted with an orange line under its name.
- Use the dropdown carrot to export only the sub-report you are currently viewing.

Auto Search & Slicers

- Auto Search: Filters applied will remain active until removed, so be sure to reset filters if needed.
- Slicers:
  - Click a slicer box to filter data.
  - Shift + Click to select multiple contiguous values.
  - Ctrl + Click to select multiple non-contiguous values.
  - Click the Reset to Default icon to clear slicer selections.
- Note: Slicers are limited to 250 values—use the search box to refine results.

Sorting and Formatting Reports

Sorting Data

- Click a column header or right-click in the filter field below a column to sort data.
- Choose ascending or descending order from the pop-up menu.

- The Show Values option displays the number of occurrences of each value in the column.

Filtering Data

- To filter out blank fields, use: !BLANK
- To exclude a specific value, use: !value
- To search for an exact value, use: =value (case-sensitive).

Formatting and Freezing Columns

- Right-click a column header to adjust formatting:
  - Freeze Columns: Moves selected columns to the left for easy reference.
  - Background Color: Customize column highlights.
  - Column Width: Adjust for better readability.
- Unfreeze a column by right-clicking and selecting "Unfreeze Column".

Exporting Apptio Reports

Exporting Data

- Click the gray down arrow in the top left of a table to choose an export format.
- Use the export options in the top right of the report to export all report tables into a single spreadsheet.

Exporting Multi-Tab Reports

- Each table in a report will appear as a separate tab in Excel.
- Example:
  - Tab 1 has two tables → Exports as two separate tabs in Excel.
  - Tab 2 has one table and a chart → The table is exported, but the chart appears as a data table.

Common Reports for WaTech Customers

Report Name	Purpose
Customer Billing Accounts & Contacts	Shows invoice contacts and fee-for-service totals.
Customer Billing Detail	Displays detailed service purchases (VPN, email, etc.).
Mainframe Billing Detail	Breaks down mainframe-related charges.
Customer Sales History	Provides a history of purchases and credits.
Fee-for-Service Sales Info	Includes billing summaries, service trends, and detailed data.

More details are available in the full Apptio report list.

Report Equivalencies

This table is a crosswalk of the reports currently available from FINS or the Customer Datasets to the report name inside Apptio.

FINS Report (Short Name)	FINS Report (Long Name)	Apptio Report	Customer Dataset	Notes How to create similar in APPTIO
ADABA-PR	IBM01155-ADABA-PR ADABAS METERING SUMMARYPRODUCTION SUMMARY BY ACCOUNT	Customer Billing Detail – Mainframe (ADABAS tab)		
AP	B155F024-AP ACCT PRORATION REPORT OF DISTRORIGINAL ACCOUNT AND AMOUNT AND DISTRIBUTION			
B1	B1 CUSTOMER INVOICE FACE COPY ORIGINAL INVOICE FOR CUSTOMER FILES	On the Invoice Info (FINS) tabof Customer Billing Accts & Contacts report		
B1-R	-B1-R CUSTOMER INVOICE			

	REMIT COPYCUSTOMER INVOICE--WITH INVOICE #			
B2	B155F009-B2 ACCOUNT TOTALS BY SUB AGENCYLIKE A TABLE OF CONTENTS--LISTS ONLY ACCTS W/CHGS	Customer Sales History		Select Agency SubAcct, type in Agency #, then select in order AcctID, Acct Name, AFRS, and click Acct ID column to sort
B4	B155F009-B4 SERV OFFRNG TOTALS BY SUB AGCYSUMMARIZES DOLLARS BY SERVICE OFFERINGS	Customer Sales History		Select Agency SubAcct,type in Agency #, then selectin order SO Number-Name, and click column to sort
BI202	IBM01155- BI202 DISK UTILIZATION	Customer Billing Detail – Mainframe (DASD Storage tab)		
BI55A-PR	IBM01155-BI55A-PR CICS UTILIZATION PRODUCTION	Customer Billing Detail – Mainframe (CICS tab)		
D4	B155F009-D4 SERV OFFRNG TOTAL BY ACCT IDINCL DETAIL OF ADJUSTS	Customer Fee-for-Service Sales Info under Agency Billing tab, using Agency Billing (Fee for Service) table	D4	
LTS-100	BLRPT001-LTS-100 LTS DETAIL BILLING REPORT PHONE INVENTORY DETAIL BILLING --BY PHONE LINES	Customer Billing Detail (Phone Lines tab)	Includes three datasets (LTSINV; LTSADJ; LTSORD)	
LTS-200	BLRPT001-LTS-200 LTS LOCATION TOTAL REPORT TELEPHONE INVENTORY LOCATION TOTALS - LINES BY LOC			
LTS-300	BLRPT001-LTS-300 CENTRAL OFFICE/PBX TOTALS PHONE INVENTORY BY CENTRALOFFICE/PBX			
LTS-400	BLRPT001-LTS-400			

	PHONE INVENTORY ACCT UNIT TOTPHONE INVENTORY/VOICE SUMMARIZED BY ACCOUNT			
Apptio Handbook Revised December 2021	XM1COB02-SLD100 SWITCHED LD CALL DETAIL SWITCHED LONG DISTANCE CALLDETAIL W/O TAX	Customer Billing Detail (Switched Long Distance tab) NOTE: This report does not include DSHS data	SLDCALL	
	XM1COB02-SLD200 SWITCHED LD ACCOUNT SUMMARY SWITCHED LONG DISTANCE ACCOUNT SUMMARY W/TAX	Customer Sales History		Select Agency SubAcct, type in Agency #, then select in order CC Number 3321, AcctID, and click Acct ID column to sort
	XM1COB02-SLD300 SWITCHED LD MONTHLY USAGE SUMM SWITCHED LONG DISTANCE MONTHLY USAGE SUMMARY			
	M6746155-TOLL-1 PHONE CALLS NOT MADE ON SCAN DETAIL OF TOLL CALLS NOT MADE ON SCAN (ON USWTAPE)	Customer Billing Detail (Tolltab) NOTE: This report does not include DSHS data	TOLLCALL	
	M6746155-TOLL-2 SUMMARY TOLL REPORT BY ACCT SUMMARY OF TOLL CALLS BY ACCT			
	DM0COB01-TRAN-100 WAN SERVICES DETAIL BILLINGREPORT - CIRCUIT NUMBER	Customer Billing Detail (Network tab) Only Non-allocated Data Network or Wireless customers NOTE: network inventory, including allocated	WAN	

		customers, is contained on Customer Network Services Inventory report		
	DM0COB01-TRAN-200 WAN SERVICES LOCATION TOTALS WAN SERVICES BILLING BY LOCATION			

Billing Reports Available Via Apptio or Customer Dataset Only

There are some reports that are available only through Apptio or the Customer Dataset.

CONFCALL	Available through CDS and APPTIO only
VPN user detail	Available through APPTIO only

Billing Reports Available by Customer Dataset (CDS) Only

There are some reports that are available only through Apptio or the Customer Dataset.

SLDINV	SLDINV is only available to Telecommunication Coordinator in paper or through CDS.

INTERNAL Customers/Providers of WaTech Services: Most Used Reports

Report Name	Intended Use	Notes/Limitations
Group 1 WaTech Colocation WaTech Active Directory WaTech Email WaTech Fee-For- Service WaTech Hosting & Cloud WaTech Listserv WaTech MDM WaTech Skype WaTech Storage WaTech Web Hosting & URL Redirect WaTech eGov WaTech Network Billing WaTech VPN WaTech Wireless	Reports in group 1 are used by service owners to identify potential billing problems with data sent prior to invoicing the customer. Reports in both group 1 and 2 are used by service owners to understand trends in each service area and in production of the agency performance dashboard.	Each report in group 1 is based off data provided to billing on the 18th of the month for the billing period (16th of prior month thru 15th of current) by the service area. Each report in group 2 is based off data returned to us from the billing process (that runs on the 1st workday of each month).
Customer Fee-for-Service Sales Info		This report is filled with miscellaneous and redundant items; we are actively reviewing it for improvement or elimination.
WaTech CICS Transaction Usage OverTime	Allows for tracking of usage of various CICS transactions by service areas to gain insight as systems are decommissioned.	CICS transactions can be grouped into a particular category; at present categories are limited to WaTech internal billing
WaTech Internal Sales	Two tabs primarily used by Budget Staff to prepare internal JVs for internal sales and allocation distributions. Two tabs used by WaTech cost center owners to track who in WaTech is buying	
WaTech Performance Measures	Used for production of WaTech public dashboard	

WaTech Data Center – SDC Enclosure Reports	Used to track enclosures in the SDC	Some components of the report are secured/visible to WaTech users only.
WaTech Mainframe CPU Utilization	Used for production of WaTech public dashboard	

Reports Not Listed

Reports not listed on either the external or internal users' most interest/use' tables are under review to determine if they are needed/useful.

Change Management & Notifications

- WaTech continually improves Apptio reports based on user feedback.
- Updates are communicated via two distribution lists:
    - **Internal WaTech Apptio Users** (for WaTech staff)
    - **External WaTech Apptio Users** (for customers)

Leaving your organization? Notify WaTech to remove you from the list via email to: **support@WaTech.wa.gov** (Ask for routing to the WaTech Billing Group)

Contacts

- **Billing questions:** watechbillingsupport@watech.wa.gov
- **Application access & Cost Transparency**: tbmprogram@ocio.wa.gov
- **General inquiries:** support@WaTech.wa.gov (Ask for routing to the WaTech Billing Group)