



# Contents

| Overview                                    |
|---|
| System Availability                         |
| System Requirements                         |
| Logging In to Apptio                        |
| Navigating Apptio Reports4                  |
| Selecting a Product                         |
| Finding Reports4                            |
| Selecting a Date Range4                     |
| Using Reports in Apptio5                    |
| Navigating Reports5                         |
| Viewing More Reports5                       |
| Filtering Data5                             |
| Sorting and Searching Data5                 |
| Exporting and Sharing Reports6              |
| Navigating and Using Apptio Reports6        |
| Viewing Reports6                            |
| Viewing Additional Reports ("More" Option)6 |
| Filtering and Exporting Data7               |
| Resetting Filters7                          |
| Exporting Data7                             |
| Using Sub-Reports (Tabs)7                   |
| Auto Search & Slicers7                      |
| Sorting Data7                               |
| Filtering Data                              |
| Formatting and Freezing Columns8            |
| Exporting Data8                             |
| Exporting Multi-Tab Reports8                |



## Apptio Guide

| Common Reports for WaTech Customers                               | 9    |
|---|------|
| Report Equivalencies  | 9    |
| Billing Reports Available Via Apptio or Customer Dataset Only     | . 12 |
| Billing Reports Available by Customer Dataset (CDS) Only          | . 12 |
| NTERNAL Customers/Providers of WaTech Services: Most Used Reports | . 13 |
| Reports Not Listed  | . 14 |
| Change Management & Notifications                                 | . 14 |
| Contacts  | . 14 |



## 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: <u>https://stofwa.apptio.com/#:prd:stofwa.com:WaTech+Billing</u>
- 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

| O WaTech Billing - Apptio | × +                                 |  |         |
|---------------------------|-------------------------------------|--|---------|
| ← → C S stofwa.apptio.c   | :om/#:prd:stofwa.com:WaTech+Billing |  | QÍ      |
| BB New folder D Imported  | OFM-One Washingt                    |  |         |
| ш                         |                                     | Q Date Range  Protocoment Production Production  |         |
|                           | Home                                |  |         |
| an IBM Company            | «                                   |  | C REFRE |
| Welcome!                  | Υ                                   |  |         |
| My Landing Page           |                                     | Welcome to the WaTech Billing  |         |
| Recents fr >              |                                     | This is a repository for various reports used by WaTech internal and external customers to review WaTech sales and service data.   |         |
| Favorites                 |                                     |  |         |
| Report Collections V      |                                     |  | _       |
| Home                      |                                     |  |         |
| Watech Internal Analysis  |                                     | Questions/comments about any of the reports or data housed in this project, or navigating in/using the tool to<br>access these reports, should be directed to the WaTech Billing team. |         |
| WaTech Internal Ops       |                                     | They can be reached through the WaTech Support Center at 855.WaTech1, 360-586-1000 or via email at<br>Support@Watech.wa.gov  |         |

### 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**

| CTS Billing    | WaTech Customer Billing   | <ul> <li>September FY2018 - Produ</li> </ul> | tion 👻           |                              |           |                               |                 | Trunk 👻 Gallivan, Ti            | im (WaTech) 👻 🔹                     |
|----------------|---|--|------------------|------------------------------|-----------|-------------------------------|-----------------|---------------------------------|-------------------------------------|
| WaTech Cus     | tomer Billing Cust  | omer Billing Accts & Contacts Customer Bil   | ing Detail       | Customer Billing Detail - Mo | inframe C | ustomer Fee-for-Serv          | ice Sales Info  |                                 | More (3) 🐱 🏷                        |
|                |   | 6  | Sub Re<br>this c | ports within<br>ollection    |           | Reports with<br>report coller | n this<br>ction | Click to view more reports      | 2 3<br>Reset page<br>report filters |
| - Billing Acc  | ount Code   | Kenne (rinks) - bining contacts (riss)       |                  |                              |           |                               |                 | Customer # and Name             |                                     |
| AGV-Account    | Agency Name   | ACCT-DESCRIPTION                             |                  | AFRS-CODE                    | Acct Used | Current Count Of Accts        | Active          | 7 💌 🍢 Search 🖉                  | Export entit                        |
|                | P   | 8  |                  |                              | P         | + Used                        | Acces           | 0110 - HOUSE OF REPRESENTATIVES | page                                |
| 100-0111AD     | HOUSE OF REPRESENTATIVES  | PAVROLL                                      | ~                |                              | YES       | Report "slicer" to            | filter all      | 0120 - SENATE                   |                                     |
| 0110 5950FS    | HOUSE OF REPRESENTATIVES  | FINANCIAL SYSTEMS - AFRS                     |                  |                              | YES       | report data on                | page            |                                 |                                     |
| 01100 - 0      | RESENTATIVES  | CENTRAL OFFICE SERVICES                      |                  |                              | YES       | 1                             | 1               | 0130 - JOINT TRANSPORTATION C   |                                     |
| 01100 - 5 Aut  | o-Search RESENTATIVES   | SCAN SERVICES (DEFAULT)                      |                  |                              | YES       | 1                             | .1              | 0140 - JOINT LEGISLATIVE AUDIT  |                                     |
| 01100 - 5      | RESENTATIVES  | UNASSIGNED DISC/TAPE BILLING                 |                  |                              | NO        | 0                             | 3               | 0200 - LEGISLATIVE EVALUATION   |                                     |
| 01100 - 5900IN | HOUSE OF REPRESENTATIVES  | INTERNET/RELATED/ALLOCATION                  |                  |                              | NO        | 0                             | 1               |                                 |                                     |
| 01200 - 5950FS | SENATE  | FINANCIAL SYSTEMS - AFRS                     |                  |                              | YES       | 1                             | 1               | 0350 - OFFICE OF THE STATE ACTU |                                     |
| 01200 - CENTOD | SENATE  | CENTRAL OFFICE SERVICES                      |                  |                              | YES       | 1                             |                 | 0370 - OFFICE OF LEGISLATIVE SU |                                     |
| 01200 - SCAN00 | SENATE  | SCAN SERVICES (DEFAULT)                      |                  |                              | YES       | 1                             | 1               |                                 |                                     |
| 01200 - 5900IN | SENATE  | INTERNET/RELATED/ALLOCATION                  |                  |                              | NO        | 0                             | 1               | 0380 - JOINT LEGISLATIVE SYSTE  |                                     |
| 01300 - 5950FS | JOINT TRANSPORTATION COMMITTEE                                    | OFM/AFRS/RELATED                             |                  |                              | YE5       | 1                             | 1               | 0400 - STATUTE LAW COMMITTEE    |                                     |
| 01300 - 5900IN | JOINT TRANSPORTATION COMMITTEE                                    | INTERNET/RELATED/ALLOCATION                  |                  |                              | NO        | 0                             | 1               |                                 |                                     |
| 01300 - CENT00 | JOINT TRANSPORTATION COMMITTEE                                    | TELEPHONE UNES                               |                  |                              | NO        | 0                             | 1               | 0450 - SUPREME COURT            |                                     |
| 01300 - SCAN00 | JOINT TRANSPORTATION COMMITTEE                                    | TELEPHONE SERVICE                            |                  |                              | NO        | 0                             | 1               |                                 |                                     |
| 01400 - 5800VP | JOINT LEGISLATIVE AUDIT AND REVIEW<br>COMMITTEE                   | VPN SERVICE                                  |                  |                              | YES       | 1                             | .1              |                                 |                                     |
| Tot            | at  |  |                  |                              |           | 4,449                         | 11585           |                                 |                                     |
| 14 4 Page 1    | of 773 > > Displaying 1 - 15 of 11585                             |  |                  |                              |           |                               |                 |                                 |                                     |
| Tot            | at<br>of 773  IDisplaying 1 - 15 of 11585<br>ise of Account Codes |  |                  |                              |           | 4,449                         | 11585           |                                 |                                     |

- 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:
  - $\circ$  Tab 1 has two tables → Exports as two separate tabs in Excel.
  - Tab 2 has one table and a chart  $\rightarrow$  The table is exported, but the chart appears as a data table.



### **Common Reports for WaTech Customers**

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



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



|  | PHONE INVENTORY<br>ACCT UNIT TOTPHONE<br>INVENTORY/VOICE<br>SUMMARIZED BY<br>ACCOUNT                           |  |          |   |
|--|--|--|----------|---|
| Apptio<br>Handbook<br>Revised<br>December 2021 | XM1COB02-SLD100<br>SWITCHED LD CALL<br>DETAIL SWITCHED<br>LONG DISTANCE<br>CALLDETAIL W/O TAX                  | Customer Billing<br>Detail (Switched<br>Long Distance<br>tab)<br>NOTE: This report<br>does not include<br>DSHS data  | SLDCALL  |   |
|  | XM1COB02-SLD200<br>SWITCHED LD<br>ACCOUNT SUMMARY<br>SWITCHED LONG<br>DISTANCE ACCOUNT<br>SUMMARY W/TAX        | Customer Sales<br>History  |          | Select Agency SubAcct,<br>type in Agency #, then<br>select in order CC<br>Number 3321, AcctID,<br>and click Acct ID<br>column to sort |
|  | XM1COB02-SLD300<br>SWITCHED LD<br>MONTHLY USAGE<br>SUMM SWITCHED<br>LONG DISTANCE<br>MONTHLY USAGE<br>SUMMARY  |  |          |   |
|  | M6746155-TOLL-1<br>PHONE CALLS NOT<br>MADE ON SCAN DETAIL<br>OF TOLL CALLS NOT<br>MADE ON SCAN (ON<br>USWTAPE) | Customer Billing<br>Detail (Tolltab)<br>NOTE: This report<br>does not include<br>DSHS data   | TOLLCALL |   |
|  | M6746155-TOLL-2<br>SUMMARY TOLL<br>REPORT BY ACCT<br>SUMMARY OF TOLL<br>CALLS BY ACCT                          |  |          |   |
|  | DM0COB01-TRAN-100<br>WAN SERVICES DETAIL<br>BILLINGREPORT -<br>CIRCUIT NUMBER                                  | Customer Billing<br>Detail (Network<br>tab)<br>Only Non-<br>allocated Data<br>Network or<br>Wireless<br>customers<br>NOTE: network<br>inventory,<br>including<br>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                  | Reports in group 1 are used by   | Each report in group 1 is based |
| WaTech Colocation        | service owners to identify       | off data provided to billing on |
| WaTech Active Directory  | potential billing problems with  | the 18th of the month for the   |
| WaTech Email             | data sent prior to invoicing the | billing period (16th of prior   |
| WaTech Fee-For- Service  | customer.                        | month thru 15th of current) by  |
| WaTech Hosting & Cloud   |                                  | the service area.               |
| WaTech Listserv          | Reports in both group 1 and 2    |                                 |
| WaTech MDM               | are used by service owners to    | Each report in group 2 is based |
| WaTech Skype             | understand trends in each        | off data returned to us from    |
| WaTech Storage           | service area and in production   | the billing process (that runs  |
| WaTech Web Hosting & URL | of the agency performance        | on the 1st workday of each      |
| Redirect                 | dashboard.                       | month).                         |
| WaTech eGov              |                                  |                                 |
| WaTech Network Billing   |                                  |                                 |
| WaTech VPN               |                                  |                                 |
| WaTech Wireless          |                                  |                                 |
|                          |                                  | This report is filled with      |
| Customer Fee-for-Service |                                  | miscellaneousand redundant      |
| Sales Info               |                                  | items; we are actively          |
|                          |                                  | reviewing it for improvement or |
|                          |                                  | elimination.                    |
|                          | Allows for tracking of usage of  | CICS transactions can be        |
| WaTech CICS Transaction  | various CICS transactions by     | grouped into a particular       |
|                          | service areas to gain insight as | category; at present            |
|                          | systems are decommissioned       | categories are limited to       |
|                          |                                  | WaTech internal billing         |
|                          | Two tabs primarily used by       |                                 |
|                          | Budget Staff to prepare          |                                 |
|                          | internal JVs for internal sales  |                                 |
| WaTech Internal Sales    | and allocation distributions.    |                                 |
|                          | Two tabs used by WaTech cost     |                                 |
|                          | center owners to track who in    |                                 |
|                          | WaTech is buying                 |                                 |
| WaTechPerformance        | Used for production of           |                                 |
| Measures                 | WaTech public dashboard          |                                 |



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