Contents

Welcome!

Consolidated Technology Services (WaTech) is using Apptio as a way to provide customer access to summary and detail level reports of services billed to them.

We welcome your feedback on the reports as you view and use them. We cannot develop customized reports for each customer (we recognize your needs may vary), but your feedback will help guide us in improving existing and creating/maintaining the best set of reports and features to serve our broad customer base.

Requests, suggestions and feedback should come to us in the form of service request tickets through the WaTech Support Center at 855.928.3241 or 360.586.1000 or via email at support@WaTech.wa.gov. Please instruct the Support Center to route the request to the WaTech Billing Group.

System Availability

Other than occasional maintenance that takes place during weekend hours, the application is generally available 24x7. In the event of an application change, we utilize distribution lists to notify you a week in advance to ensure you have enough time to manage the change.

If you find the system to be unavailable when you try to access it and there is no notice of a maintenance window, please report this outage to the WaTech Support Center at 855.928.3241 or 360.586.1000 or via email at support@WaTech.wa.gov.

System Requirements

Apptio is a Software-as-a-Service application, provided over the internet. You will need:

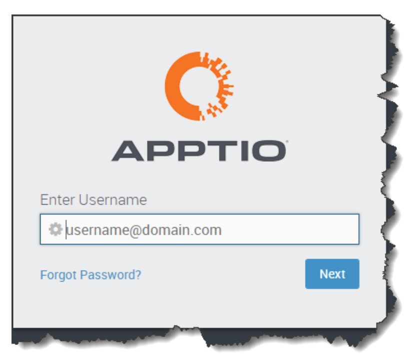
1. An active connection to the internet
2. A compatible and preferably up-to-date browser
   a. Apptio is compatible with IE, Firefox and Chrome however there may be some configuration changes necessary or other situations (such as standards within your office) that will impact your decision on which browser to use.
3. A URL (web address to find the State of WA Apptio instance)
4. A userid

System Access (Log-In Process)

When accessing the production URL, Apptio uses Frontdoor for both single sign on and explicit sign on. One way that you can access Apptio is to use the Frontdoor URL (https://frontdoor.apptio.com). Your username will always be your email, and Frontdoor will then prompt you to authenticate with single sign on **or** your username/password.

For all users, your login is your email address.

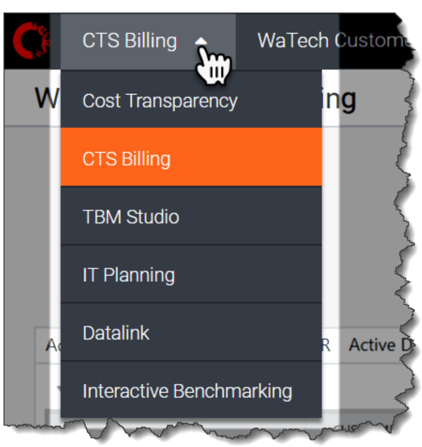
Logging in with your email will prompt you one of two ways:
1. If you are a **single sign on user**, you see prompt to select your authentication method using the Active Directory screen.
2. If you do not login with single sign on, you will need to enter your username and password.



NOTE: To update your password, click 'Forgot Password?' link located at the bottom of your login screen.

1. General Navigation

1.1 Navigating to a Project



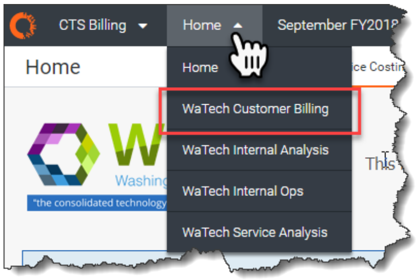
Apptio is used by several state agencies--each with their own 'project' inside Apptio. The project name is visible at the top left corner of the screen.

WaTech customers using the online reporting to view additional billing or inventory detail will need to be in the **CTS Billing** project.

Once you select this project the first time, you will not have to re-select unless you navigate to another project.

To navigate to a different project, click on the drop down option and choose another project.

1.2 CTS Billing Report Collections



This is a repository for the reports used by WaTech internal and external customers to review WaTech sales and service data.

On the CTS Billing home page, end users will be presented three buttons to group reports in a collection for each business need (see below for a list of reports available within each collection.)

You can also navigate to the report collections by using the drop-down option located at the top of the Apptio screen. (See image to the right.)

1.2.1 Customer Report Inventory (by Collection)

	Customer Billing Accts & Contacts Customer Billing Detail Customer Billing Detail – Mainframe Customer Fee-for-Service Sales Info Customer Network Services Inventory Customer Printed Reports Customer Sales History		WaTech Contracts, SLAs and Purchase Req. WaTech Asset Reports WaTech IT Resource Tower Data WaTech Telephony Customer Support WaTech Vendor Payments WaTech Fee-for-Service WaTech Internal Sales WaTech Performance Measures

1.2.2 WaTech Service Owner Report Inventory

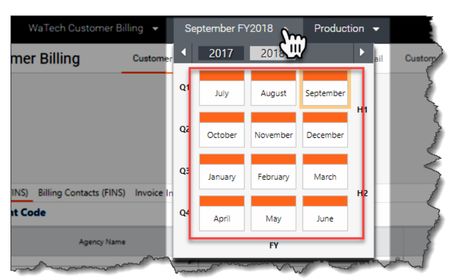
	**All the Service Analysis reports** WaTech Hosting & Cloud WaTech Storage WaTech VPN WaTech Wireless WaTech EGov WaTech Colocation WaTech Listserv WaTech MDM WaTech Skype	WaTech Web Hosting & URL Redirects WaTech Email WaTech Active Directory Enclosure Equipment Detail WaTech Data Center – Enclosure Reports WaTech CICS Transaction Usage Over Time WaTech Command Center Metrics WaTech Infra Decommission Status WaTech Mainframe CPU Utilization WaTech Tickets – CMS Call Increments WaTech Tickets – Support Ticket Trend

1.3 Data Availability / Timeliness

Generally, monthly billing data reports are available in the Production Apptio environment within three working days of the billing process completion (on first work day of each month).

1.4 Navigating to the Desired Time.

The Apptio calendar is a fiscal year -- not a calendar year.



The date/time period is located immediately to the right of the Home field at top center of screen. If you hover the mouse over a specific month, the calendar year information will display.

Example: September FY2018: 09/01/2017 – 09/30/2017

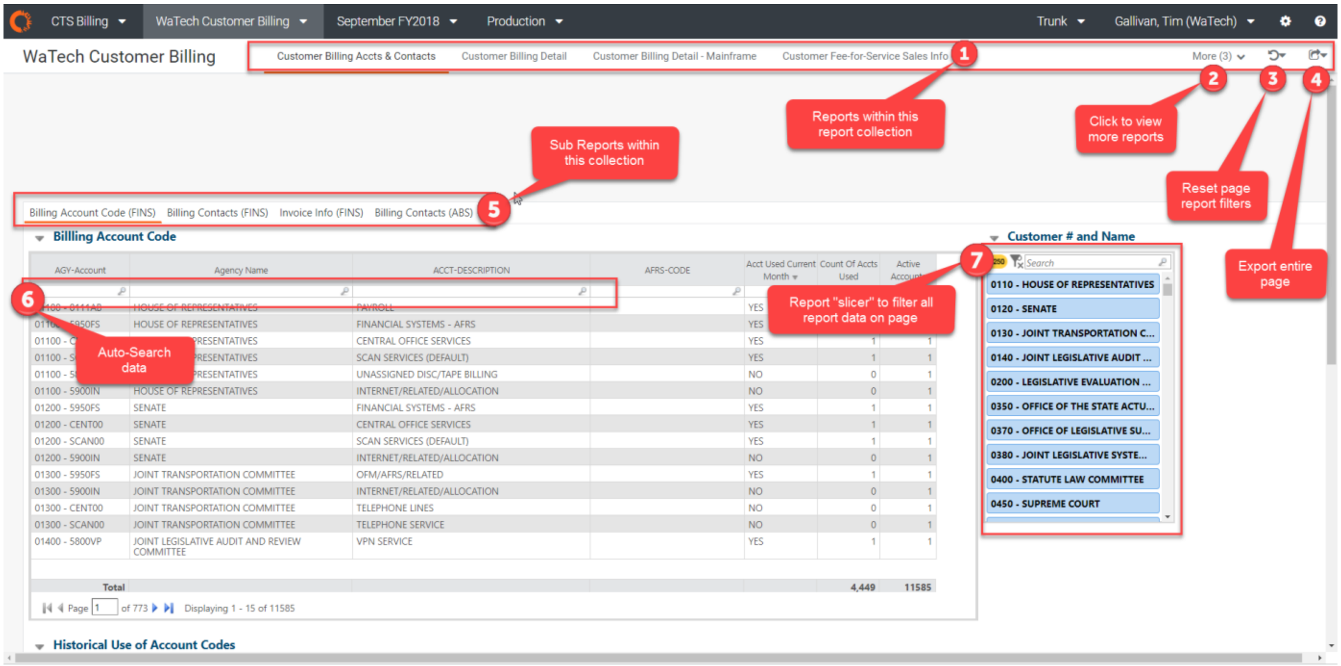
- If the month is January thru June, the calendar year = the fiscal year.
- If the month is July thru December, the calendar year = the fiscal year – 1.

Reminder: Be sure to check the 'calendar' each time you use APPTIO to ensure it is set to the month you want.

You can move forward and backward in time on the displayed calendar by utilizing the ◂ and ▸ arrows on either side of the date period, or by clicking on the date period and then on the month (and fiscal year) you wish to view.

2. Apptio Report Navigation

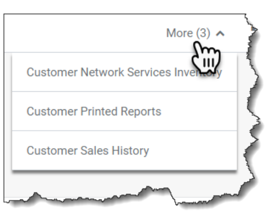
2.1 General Overview



2.2 Report Display

After selecting the collection of reports to be viewed (example is for WaTech Customer Billing), the application tool bar will present the **reports** within the report collection. You can navigate to any of these reports by clicking on the report name. The active report will have a highlighted orange line underneath the title.

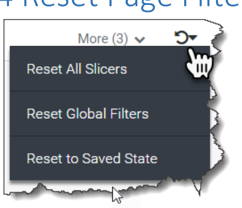
2.3 Report Number ("More" Option)



The number of reports displayed on your screen may differ depending on your screen resolution.

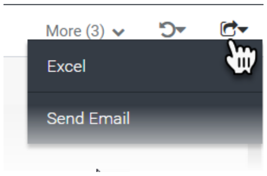
To assist, the application displays all the report names that can fit onto your page and provides a dropdown option to inform you of how many other reports are available within this collection.

2.4 Reset Page Filters



Apptio provides a clear filters dropdown option to assist end users reset all filters on the presented page.

2.5 Export Page Data



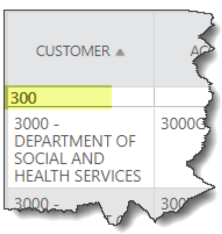
You can use the drop down option and download the data to excel; or use your native mail application to send the data to another user. Because the data set can be fairly large, we recommend using the filtering options within the report before you download or send the data to another person.

2.6 Sub Reports (Tabs)

Some reports were designed to have individual sub reports to assist end users in viewing similar data within a single page.

Similar to what you would see in Excel you can navigate to different sub reports by clicking on the individual 'tabs'. The active tab will have a highlighted orange line underneath the sub report name. (Similar to the report name within the collection.)

2.7 Auto Search



To find a specific value in one or more columns, enter the item you are searching for in the search row that appears immediately under the column header and above the table contents. You can enter partial words or numbers, and the table will filter by that value. You can use this feature on multiple columns on the table.

CAUTION: These filters will stay in place so be sure to remove them to see the full data. Screenshot below is example.

2.8 Slicers

Slicers are boxes that allow for selection of one or more filters to apply to all of the report components in a particular grouping on a particular screen.

To select a value in a slicer, simply click once on that value. It will turn dark blue indicating selection. To select more than one value, use the shift or control keys in addition to the single click (shift click will allow you to select a number of contiguous values in the slicer list, while control click will allow you to select non-contiguous values).

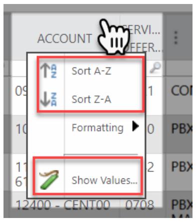
Many reports contain slicers that narrow the selection (example: you may be able to slice by agency name and by account code). If you were to select by agency name, the slicer for account code would automatically show you only those account codes belonging to that agency. To avoid confusion, filter from the first level and then try adding the other slicers.

To reset a single slicer so all values are shown, click on the filter with the reset to default icon  on the slicer.

NOTE: The slicers are limited to 250 values in a list – there are some lists with more values, so use the filter to narrow the search by typing the partial value in the search box of the slicer.

2.9 Useful Navigation and Options inside Any/All Apptio Reports

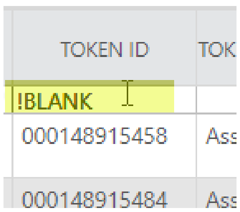
2.9.1 Sorting by column and show unique values



To sort a table by a particular column, click on the column header or right mouse click in the filter field just below. A pop-up window displays with sort options…select ascending or descending order.

Show Values provides listing of how many occurrences of each value in the column (this replaces the show unique/show duplicates option).

2.9.2 Search for BLANK, not EQUAL, or EQUAL



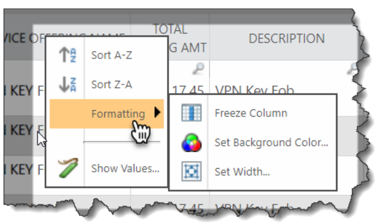
To search for blanks in a column or a value that is NOT equal, use the following syntax:

!BLANK or !0 or !phrase where the phrase is the item you want to filter OUT of the resulting dataset.

If searching for specific phrase, use =phrase … this is case sensitive, so if field is all caps use all caps

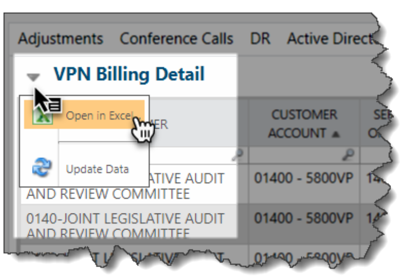
2.9.3 Formatting and Showing Unique and/or Duplicate Values

Click on the column header to diplay pop-up window with options for sorting the column, formatting, or showing values.



Formatting allows for freezing of columns, setting the background color or setting the width of column. When you ‘freeze’ a column on an Apptio report, that column will relocate to the first column of the table and indicate with a vertical bar that the column is frozen/separate from the rest of the report. You can freeze multiple columns--they will appear in the order ‘frozen’.   Unfreeze a column by right clicking and selecting ‘Unfreeze column’.

2.10 Exporting Data from Apptio Reports



You can easily export a single table or an entire report by using the export feature.

Within a tab, clicking the gray down arrow by the top left of table title displays window where you can select file type for export and format for export.

If you use the export options at the top of right of the report, you can export or e-mail all of the tables on all of the tabs inside the report to a single spreadsheet. (See “Export Page data” noted within the General Navigation section earlier in this document.

Each component table will appear on separate tab in the spreadsheet; this will not correlate one-to-one with the tab titles on the report, but rather with the individual components within the report.

Example: a report contains 2 tabs. Tab1 contains 2 tables, and Tab2 contains 1 table and a chart. The export to Excel would contain 1 tab for the first table on Tab1 of the report, 1 tab for the 2nd table on Tab1 of the report, and 1 tab for the only table on Tab2 of the report. The chart would not be exported as a chart, but rather as a table showing the data values that lie behind the chart.

3. Purchasers of WaTech Services: Reports of Most Use

Report Name	Intended Use	Notes/Limitations
Customer Billing Accts & Contacts	Shows Contact names associated with eStatement invoice delivery and FINS fee-for-service reports. Also shows FINS 'Invoice' report totals	
Customer Billing Detail	Shows customers the detail behind many of their fee-for-service purchases (e.g. the VPN tab shows which users have tokens or certificates, the Email tab shows mailboxes being billed, etc.)	Limited to fee-for-service related billings at present.
Customer Billing Detail – Mainframe	Shows customers detail behind their fee-for-service mainframe-related purchases such as CICS, Batch/TSO, etc.	Limited to fee-for-service related billings at present.
Customer Sales History	Report contains two tabs that allow the customer to search their fee-for-service history of purchases from WaTech or all of their purchase history from WaTech (inclusive of allocations, SLA/one-time purchases, etc.) One additional tab exists for Credits (not inclusive of Volume Discounts).	The data related to fee-for-service is available back to July FY2012 but for a few months gap. The data related to allocation billing is available back to JulyFY2016 which is the WaTech creation date.

4. 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 SUMMARY PRODUCTION SUMMARY BY ACCOUNT	Customer Billing Detail – Mainframe (ADABAS tab)		
AP	B155F024-AP ACCT PRORATION REPORT OF DISTR ORIGINAL ACCOUNT AND AMOUNT AND DISTRIBUTION			
B1	B1 CUSTOMER INVOICE FACE COPY ORIGINAL INVOICE FOR CUSTOMER FILES	On the Invoice Info (FINS) tab of Customer Billing Accts & Contacts report		
B1-R	-B1-R CUSTOMER INVOICE REMIT COPY CUSTOMER INVOICE--WITH INVOICE #			
B2	B155F009-B2 ACCOUNT TOTALS BY SUB AGENCY LIKE 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 AGCY SUMMARIZES DOLLARS BY SERVICE OFFERINGS	Customer Sales History		Select Agency SubAcct,type in Agency #, then select in 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 ID INCL 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 CENTRAL OFFICE/PBX			

LTS-400	BLRPT001-LTS-400 PHONE INVENTORY ACCT UNIT TOT PHONE INVENTORY/VOICE SUMMARIZED BY ACCOUNT			
SLD100	XM1COB02-SLD100 SWITCHED LD CALL DETAIL SWITCHED LONG DISTANCE CALL DETAIL W/O TAX	Customer Billing Detail (Switched Long Distance tab) NOTE: This report does not include DSHS data	SLDCALL	
SLD200	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
SLD300	XM1COB02-SLD300 SWITCHED LD MONTHLY USAGE SUMM SWITCHED LONG DISTANCE MONTHLY USAGE SUMMARY			
SLD400	XM1COB02-SLD400 SWITCHED LD ACCOUNT SUMMARY SWITCHED LONG DISTANCE ACCOUNT SUMMARY REPORT			
TOLL-1	M6746155-TOLL-1 PHONE CALLS NOT MADE ON SCAN DETAIL OF TOLL CALLS NOT MADE ON SCAN (ON USWTAPE)	Customer Billing Detail (Toll tab) NOTE: This report does not include DSHS data	TOLLCALL	
TOLL-2	M6746155-TOLL-2 SUMMARY TOLL REPORT BY ACCT SUMMARY OF TOLL CALLS BY ACCT			
TRAN-100	DM0COB01-TRAN-100 WAN SERVICES DETAIL BILLING REPORT - CIRCUIT NUMBER	Customer Billing Detail (Network tab) Only Non-allocated Data Network or Wireless customers NOTE: network inventory, including allocated customers, is contained on Customer Network Services Inventory report	WAN	
TRAN-200	DM0COB01-TRAN-200 WAN SERVICES LOCATION TOTALS WAN SERVICES BILLING BY LOCATION			

4.1 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

4.2 Billing Reports Available by Customer Dataset (CDS) Only

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

5. INTERNAL Customers/Providers of WaTech Services: Reports of Most Use

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 Group 2 • 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 a given 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 Over Time	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 systems and AFRS.
WaTech Asset Reports	Snapshot of assets in our Asset Management system	Updated with fresh data the 15th of each month.
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 their services or who they are buying from	
WaTech Contracts, SLAs and Purchase Requests	Snapshot of contracts in our Contracts database, SLAs and Purchase requests	Updated with fresh data the 2nd of each month.
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 by High Capacity Computing cost center manager to assess utilization trends.	

5.1 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.

6. Change Management

As noted above, we are hard at work trying to improve existing reports and create new reports that will best meet the needs of our customers, internal and external.

As we make changes, we want to keep you notified of them so we have created three distribution lists and we will add your email to the appropriate list(s) when you request an Apptio userid.

Similarly, if you are leaving your organization or assuming a different role and will no longer require Apptio access, please notify us by contacting us in the form of service request tickets through the WaTech Support Center at 855.WaTech1 or 360.586.1000 or via email at support@WaTech.wa.gov. Please instruct the Support Center to route the request to the WaTech Billing group.

The two distribution lists are:

- WaTech dl Internal WaTech Apptio Users – users inside WaTech
- WaTech dl External WaTech Apptio Users – WaTech customers who use reports in the CTS Apptio project

We will do our best to keep you informed without overwhelming you. Please let us know if we hit (or miss) the mark.

7. Additional questions

- For questions related to CTS Billing, contact watechbillingsupport@watech.wa.gov
- For questions related to application access or Cost Transparency, contact ociotbmprogram@ocio.wa.gov
- If you are not sure who to contact, open a support ticket by emailing Support@watech.wa.gov and instruct the Support Center to route the request to the WaTech Billing group.