Mainframe Billing System
User Guide

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Overview

VITA is implementing its Mainframe Billing System with IBM's Smart Cloud Cost Management (SCCM) product. This product features online presentation of billing reports in many formats, delivery of reports by email, and extensive reporting capabilities to allow end users to select and view data for analysis. The goal is to make this a paperless system and to provide a tool for end users to access summary and detailed billing data. Customers will receive invoices by email and will have the option to log on to a billing portal to view additional details of their bill. Reports can be generated on demand using criteria selected by the user, such as accounts and date ranges.

SCCM uses a sophisticated reporting system known as Cognos which has capabilities beyond the needs of the typical customer to review their bill. This document doesn't attempt to describe every feature of Cognos reporting, but describes the main features that are likely to be useful for reviewing the bill.

Monthly Mainframe Bill

Emailed Invoices

Bills for mainframe services are produced monthly. Early each month the billing data for the previous month is processed and the bills are generated. Customer contacts will receive an email with their invoice attached. The invoice shows summarized usage, rates, and charges for each mainframe resource consumed during the prior month.

Contacts

Contacts are individuals who want to receive the emailed invoice for their agency or organization. One customer contact is designated as the Invoice Contact, whose name appears on the invoice and is responsible for bill payment. There can be multiple contacts per customer.

To become a billing contact, submit the form at
http://vita2.virginia.gov/MISFORMS/forms/VITACSBR_BCDCC.cfm.

Contacts may also be billing portal users, although this is not required. Contacts may simply receive the emailed invoice, or choose to have online access to view details of their bill.

Billing Portal Users

For customers that want to see additional details of their bill a link to the billing portal is provided in the email with the invoice. Click on the link to go to the logon screen for the billing portal. To request access to the billing portal, see the instructions below.

Accessing the Billing Portal

Requesting Access

Use of the billing portal is optional. Some customers may elect to just receive an emailed invoice each month. Customers that want to do more detailed analysis of their bill can request access to the billing portal.

To request access to the billing portal go to http://vita2.virginia.gov/services/busServe/MainframeSvcsBilling.cfm.   Users who are not Commonwealth of Virginia employees must register with the VITA Identity Management (VIM) system before requesting access to the billing application (COV employees are already registered). Once registered, logon to VIM and request access to the ‘Mainframe Services Billing’ application.

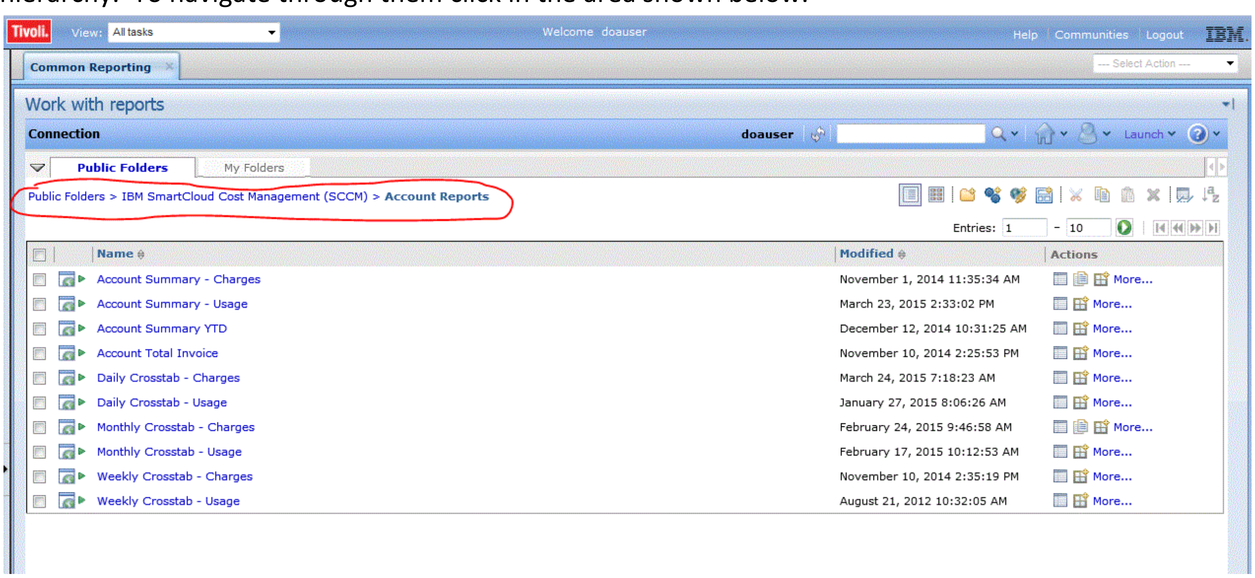
Logging On

The billing portal is accessed at https://sccm.ess.vita.virginia.gov:16313/ibm/console/. Customers that have a COV network account will use their credentials for that account. External (non-COV) users will use the email address and password they registered through the VITA Identity Management system.

The Reporting System

Navigating the Report Folders

Once logged in to the portal expand the ‘Report’ entry and click on ‘Common Reporting’, then ‘Smart Cloud Cost Management (SCCM). This starts the reporting system.   The report folders are arranged in a hierarchy. To navigate through them click in the area shown below.

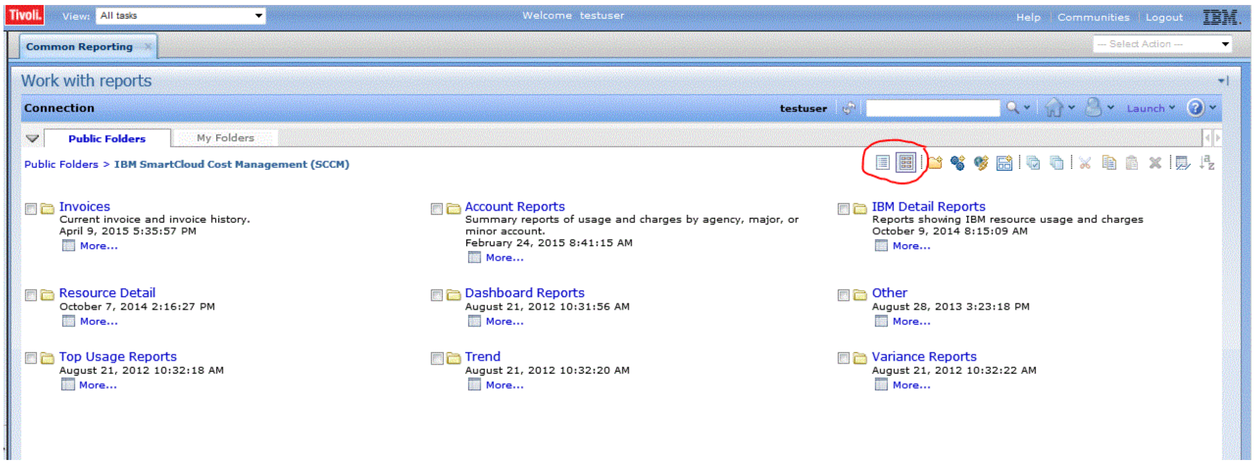


Public folders and My folders

There is a tab for 'Public Folders' and 'My Folders'. Customers can view and run reports in the 'Public Folders' area. They can save report output or create bookmarks to favorite reports in the 'My Folders' area.

List vs. Summary View

The icon shown below is used to toggle between a list and summary view. The list view presents the folders and reports with descriptions for novice users. Once familiar with the reporting system, users may prefer the more compact summary view. The list view is shown below.



Viewing and Running Reports

On-demand reports

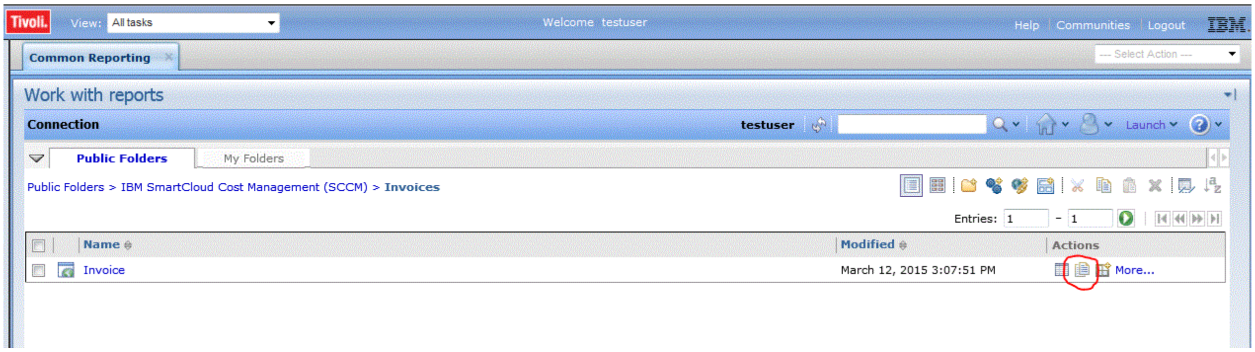
Most reports will be run by users as needed. A green arrow next to the report name indicates that the report is run on demand. When the user clicks on the report name, a parameter form is presented allowing the user to specify selection criteria for the data to be included in the report, such as specific accounts or date ranges.

View-only reports

Some reports will be view-only which is indicated by the absence of a green arrow next to the report name. To view these reports, simply click on the report name to display the most recent version of the report.

Viewing Previous Versions of Reports

Past copies of some reports, such as invoices, are archived to provide a history for the user. To view these reports click on the icon shown below. This will display a drop-down list with a date/time selection, and below it a link to the most recent version of the report. From the drop-down list, select the date of the report you want to view. Billing reports are usually produced within the first few days of the month and contain data for the previous month.



Selecting a Delivery Method

Some reports will take some time to run, especially if they display many pages of detailed data. You will receive a message like this:

> "Your report is running.
> Instead of waiting, you can select a delivery method to run the report in the background.
> Select a delivery method".

Click on 'Select a delivery method' and then select one of the options. The report will continue running in background, and your session will be freed.

- 'Save Report' – Although this option can be selected, it does not work for customers as they do not have the necessary permissions.
- 'Save As Report View' saves the output of the report to 'My folders'. You must select 'My folders' as the destination. You cannot save to the 'Public folders' area.
- 'Email Report' allows you to email the output to any email address. See additional details under 'Saving and Emailing Reports'.

Changing the Output Format of a Report

Once a report is displayed, you can select a different output format. Most reports can be rendered in HTML, PDF, XML, Excel, or comma-delimited formats. To select a format, click on the icon shown below, then select the format you want. PDF is a good format for hard-copy reports to be printed or saved. The comma-delimited format strips out all formatting and presents the raw data in a spreadsheet. This format is especially useful for data analysis.

Saving and Emailing Reports

While viewing a report, click on 'Keep This Version' and choose one of the following options.

Email Report – Choose this option to email the report. Enter the recipients email address and choose either of the following options:

- Include a link to the report – Sends an email with a link to the report. The recipient must logon to view the report. Choose this option for large reports that may get blocked by email filters.
- Attach the report – Sends the report as an attachment. Keep in mind that large reports may get blocked by some email systems.

Save as Report View – Saves the output of the report. You must choose 'My folders' as the location. You cannot save to the 'Public folders' area.

Report Parameters

Most reports are run as needed by the user. A prompt page appears which may contain the following parameters. There is a quirk in the prompt page and it may appear with the 'Finish' button disabled. If this happens, you may need to change the parameters several times to get the 'Finish' button to enable.

Account Structure

There are two account structures in use. Most customers will use the default Mainframe account structure.

Mainframe Account structure

The mainframe accounts codes are 10 characters long. The first 3 characters are an agency abbreviation, the next 2 characters are the major account, and the last 5 characters are the minor account. Many reports can be run at several levels of summary, from agency totals to major or minor account totals.

Standard Account structure

This account structure is useful to VITA Financial staff and users who support multiple customer agencies. Reports are produced at an agency summary level. The first 5 characters of this account structure are the agency number. This is followed by a 1-character 'resource group' which is a code indicating the type of services billed. Currently there is only 1 code in use which is 'C' for 'Computer Services' or mainframe services. This is followed by a 15-character reserved field, 'activity code', which is not in use at this time.

Account Code Level

Select the level of summary for the report, from Agency to Major or Minor Account.

Account Ranges

You can select a specific account or range of accounts to include in the report. By default, the lowest to highest possible accounts for the user are selected. Users are restricted to data for the agency or agencies they support.

To select a specific range of accounts, select 'custom' from the dropdown list and enter the beginning and ending accounts in the fields to the right.

Date Ranges

Select from the options in the 'select desired date range for report' dropdown list. This will populate the start and end date fields for all options except 'Date Range'. **Do not alter the Starting Date and Ending Date fields unless you have selected 'Date Range'. Otherwise, the report may give erroneous results.**

Starting Date

Select a starting date if 'Date Range' was selected.

Ending Date

Select an ending date if 'Date Range' was selected.

Rate Groups

To reduce the amount of data in the report, you can select a rate group, for example 'IBM Prime CPU Time', 'IBM Tape Storage', etc.

Display Options

This option is not in use.

Invoices

Invoice Attached to Email

Within the first few days of the month, customer contacts will receive an email with an attached invoice for mainframe services provided in the prior month. Customers can simply view their charges in the attached invoice or click on the link in the email to log on to the billing portal for additional details of their bill. Copies of invoices are also stored in the billing portal with 'drilldowns' to view details of resource usage.

Current Invoice

Current and past invoices are stored in the billing portal to be viewed by users. To view the most recent invoice navigate to the 'Invoices' folder, and click on the 'Invoice' report.

Invoice Drilldowns

The invoice contains blue hypertext links for each resource billed, and for each category of usage. In order to use the drilldowns, you must log on and open the invoice in the 'Invoices' folder. To view details of the usage, click on the hypertext, then select one or more identifiers to list in the report. For example, for batch jobs you might list job name, start date, and time. Run times can be lengthy if multiple identifiers are selected. This report shows only usage, not charges.

Invoice history

To view previous invoices open the 'Invoices' folder. Click on the icon for viewing previous versions of reports (see 'Viewing Previous Version of Reports' in this document). This will display a screen with a dropdown list containing dates and a link to the current invoice with the invoice number next to it. To see previous invoices, select a date from the dropdown list. Note that the invoice number is displayed with each copy of the invoice. It contains the agency number, year, and month of the invoice and is useful in for finding an invoice.

Account Reports

This folder contains reports showing resource usage and charges at an account summary level. These reports give the 'big picture' and are useful for financial analysis. The user can select the level of summary by agency, major, or minor accounts. Also, the date range can be selected.

IBM Detail Reports, Unisys Detail Reports

These folders contain reports showing detailed usage and charges for batch jobs, Adabas/Complete sessions, Mapper runs, etc. Most customers will not see the Unisys Detail reports folder.

Each report can be run using selection criteria such as accounts and date ranges. In addition, there is an optional field to limit the report to a selected job name, user id, etc. This field is case insensitive and uses the percent ('%') as a 'wildcard' character. For example, searching on job name 'XYZ%' would return all jobs with a job name beginning with 'XYZ'.

Other Reports

There are many other reports provided with the Smart Cloud Cost Management product that may be useful to the customer to give many different views of usage and charges. These include 'dashboard' reports, trending reports, a client (account) report, and variance reports. These reports are available within the SCCM report folders.

Query Studio Tool

For customers that want to do additional analysis of their bill, there is a 'Query Studio' tool that allows users to create simple ad hoc reports from the billing data. This tool can be enabled for individuals on request.