SDC Invoices

Computing & Storage Services
Network Services
Voice Services

Tivoli Usage and Accounting Manager (TUAM) Instructions

State of Oregon – State Data Center

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Logging into your SDC Invoice for Computing & Storage (AID), Network Services (AIN) and Voice Services (AIT)

To log into your SDC Invoices (TUAM), open your web browser and enter the *URL* in the **Address** bar.

The URL for the SDC invoice is: https://billing.sdc.state.or.us

Note: The TUAM website has been moved to a secure and encrypted site. Make sure you update old bookmarks so that they read HTTPS.

Report List Not Displaying

TUAM is best viewed if you are running Internet Explorer (IE) version 7.0 or earlier. If you are running IE 8.0, go to the tools menu in IE 8.0, click "Compatibility View" (not Compatibility View Settings). This will turn the setting off by default and should allow you to view the TUAM invoices & reports.

Changing Your Password

Your TUAM administrator assigns user IDs and passwords using the TUAM Server Administrator program. If the **Change Password** check box is present on the Login page, you can change your password as follows:

1. Click Login to open the Login page
2. Type your user ID and current password
3. Select the **Change Password** check box and then click **LOGIN**
4. On the Change Password Page, type a new password in the **New Password** box and then type it again in the **Confirm New Password** box. The password is alphanumeric and case-sensitive and can be a maximum of 16 characters.
5. Click **Chance Password** to change the password.
6. A message will appear saying "Your password has been changed!"
7. Click **Continue** to return to the home page.

Logging into TUAM

1. Click **Login**
2. Enter your User id and password then click **Login**.
3. If the logon information is correct then you should see a *Login Successful* message and a welcome message on your screen.

`Welcome Pat Smith, you are currently signed on as DASXX00.`

Logging Off

Click **Logout** to enable one user to log off and another to log on during the same session. The home page opens with the prompt:

`Not currently signed in, please click Login to begin.`

Running Reports (Viewing your Monthly Invoice and Detail Information)

This section provides the steps for running a report

To run a report

1. Point to **Reports → Run Reports**. The report page opens displaying reports categorized by groups.
   - ⊞ Invoices
   - ⊞ SDC Detail Reports
   - ⊞ Account Reports
   - ⊞ Crosstab Reports
   - ⊞ Resource Detail
   - ⊞ Trend
   - ⊞ Variance Reports
2. To expand the groups, click ⊞ next to the report group that contains the report that you want to run. The following are the most common reports that you will use:
   - a **Payable Invoice – Network Services (AIN)**
   - b **Payable Invoice – Voice Services (AIT)**
   - c **Payable Invoice – Computing Services (AID)**
   - d **Account Level Report**
   - e **SDC Detail Reports**
3. Click on the name of the report that you want to run.
4. If the report requires parameters (i.e. Report Period, Report Year, Starting/Ending Account Codes, etc), enter the parameters on the parameters page and then click **OK** to generate the report.

Instructions for running the commonly used reports

Payable Invoice—view the monthly invoice for payment

- a Go to **Reports→Run Reports→Invoices**
- b Click on the desired **Payable Invoice** link (Network, Voice or Computer)
  - i **Starting Account Code:** Click on the dropdown menu and select your agency
  - ii **Ending Account Code:** Click on the dropdown menu and select your agency
  - iii **Year:** 2011 or select the current calendar year
  - iv **Period:** select the number that represents the month you are running.

1 = JANUARY	7 = JULY
2 = FEBRUARY	8 = AUGUST
3 = MARCH	9 = SEPTEMBER
4 = APRIL	10 = OCTOBER
5 = MAY	11 = NOVEMBER
6 = JUNE	12 = DECEMBER

- c Click on the **OK** button
- d The selected **Payable Invoice** will appear and now you can drill down to get the detail information *(see Drilling Down in Reports).*

Account Level Report—viewing the information by service areas and account code levels

- **a** Go to **Reports→Run Reports→Account Reports→Account Level Report**

A parameters page appears…

- **b** **Account Code Level:** Click on the dropdown menu and select one of the following
  - **i** Agency, length 10 – this shows the account code at the agency number level
  - **ii** ServiceArea, length 15 – this shows the account code with the agency number plus service area (e.g., MF001, DS001, VS001, NS001)
  - **iii** CustomerCode, length 25 – this shows the account code with agency number, service area, and customer code
  - **iv** CostCenter, length 45 – this show the account code with agency number, service area, customer code, and cost center.
- **c** **Starting Account Code:** Click on the dropdown menu and select your agency
- **d** **Ending Account Code:** Click on the dropdown menu and select your agency
- **e** **Invoice Number:** 1 (this report is not an invoice, but this field is included in the report
- **f** **Set the Date Range**: If you want to view information for the prior month, you can select **Last Month** and this will fill in the dates in the **From/To** fields. If you are viewing information that is prior to the last month, select **Custom** and fill in the **From/to** fields as follows:
  - **i** **From:** Click on the calendar and select the first day of the month you want to view
  - **ii** **To:** Click on the calendar and select the last day of the month you want to view.
- **g** Click on the **OK** button
- **h** The **Account Level Report** will appear. You will see a list to the left of the screen called the **Document Map** and to the right you will see the report detail. This report will allow you to drill down on the units just like the Payable invoices. *(See Drilling Down in Reports).*

SDC Detail Reports—these reports were created for the Voice and Network detail and each of these reports were created with preselected identifiers.

- **a** Go to **Reports→Run Reports→SDC Detail Reports**
  - **i** **Custom Detail By Identifier**—this report allows you to see all charges by a specific identifier. The most commonly used identifiers for this report are BILLING_NBR, COST_CENTER or ACCOUNT_CODE.
    1. **Set the Date Range:** Custom
    2. **From:** Click on the calendar and select the first day of the month you want to view
    3. **To:** Click on the calendar and select the last day of the month you want to view.
    4. **Start Value:** This is the starting value for a range of information. If you want to pull all phone numbers that start with 503, then you would enter 503 in this field. If you leave this field blank then you pull all the data for the selected identifier.
    5. **End Value:** This is the ending value for a range of information. Continuing with the starting value example, you would enter 503 in this field. If you leave this field blank then you pull all the data for the selected identifier.
    6. **Identifier:** Billing_NBR or COST_CENTER or ACCOUNT_CODE

Once you have pulled this report you will be able to drill down on the units to get more detailed information. (See Drilling Down in Reports, page 7).

i **Detail – Voice/Network Reports**—listed are the identifiers that have been preselected for each report. These reports correspond to the line items that displays on the Voice and Network invoices.

1 **Detail - Network Circuit Charges**
   a. Account_Code
   b. Billing_Nbr
   c. USOC
   d. Quantity
   e. UnitCost

2 **Detail - Network Other Charges and Credits**
   a. Account_Code
   b. TSO
   c. ChargeDate
   d. Billing_Nbr
   e. Description

3 **Detail - Voice Labor Services Charges**
   a. Account_Code
   b. Billing_Nbr
   c. TSO
   d. USOC
   e. Quantity

4 **Detail - Voice Out of State Charges**
   a. Account_Code
   b. Billing_NBR
   c. Call_DateTime
   d. Called_NBR
   e. Call_Duration

5 **Detail - Voice Directory Assistance Charges**
   a. Account_Code
   b. Billing_NBR
   c. Call_DateTime
   d. Called_NBR
   e. Call_Duration

6 **Detail - Voice Calling Card Charges**
   a. Account_Code
   b. Billing_NBR
   c. Call_DateTime
   d. Called_NBR
   e. Call_Duration

7 **Detail - Voice Toll Collect Charges**
   a. Account_Code
   b. Billing_Nbr
   c. Call_DateTime
   d. Called_Nbr
   e. Call_Duration

8 **Detail - Voice Conference Call Charges**
   a. Account_Code
   b. Billing_Nbr
   c. Call_DateTime
   d. Called_Nbr
   e. Call_Duration

9 **Detail - Voice Directory Listing Charges**
   a. Account_Code
   b. Billing_Nbr
   c. Call_DateTime
   d. Called_Nbr
   e. Call_Duration

10 Detail - Voice Flat Rate Billing Charges
   a. Account_Code
   b. Billing_Nbr
   c. InstallDate
   d. USOC
   e. Quantity

11 Detail - Voice In State Charges
   a. Account_Code
   b. Billing_Nbr
   c. Call_DateTime
   d. Called_Nbr
   e. Call_Duration

12 Detail - Voice International Call Charges
   a. Account_Code
   b. Billing_Nbr
   c. Call_DateTime
   d. Called_Nbr
   e. Call_Duration

13 Detail - Voice Megacom 800 Charges
   a. Account_Code
   b. Billing_Nbr
   c. Call_DateTime
   d. CallType
   e. Call_Duration

14 Detail - Voice Other Charges and Credits
   a. Account_Code
   b. Billing_Nbr
   c. ChargeDate
   d. TSO
   e. Description

15 Detail - Voice Preventative Maintenance Charges
   a. Account_Code
   b. Billing_Nbr
   c. TSO
   d. InstallDate
   e. USOC

16 Detail - Voice Readyline Charges
   a. Account_Code
   b. Billing_Nbr
   c. Call_DateTime
   d. CallType
   e. Call_Duration

17 Detail - Voice SDN Long Distance Charges
   a. Account_Code
   b. Billing_Nbr
   c. Call_DateTime
   d. Called_Nbr
   e. Call_Duration

18 Detail - Voice Station Equipment Charges
   a. Account_Code
   b. Billing_Nbr
   c. TSO
   d. USOC
   e. Quantity

19 Detail - Voice Telephone Company Charges
   a. Account_Code
   b. Billing_Nbr
   c. Call_DateTime
   d. Calling_Nbr
   e. Call_Duration

20 Detail – Voice Toll DDD Charges
   a. Account_Code
   b. Billing_Nbr
   c. Call_DateTime
   d. Calling_Nbr
   e. Call_Duration

ii Running the preselected identifier reports—click on the desired report link in TUAM.

iii Select the following parameters.

1. **Starting Account Code:** Click on the dropdown menu and select your starting agency number
2. **Ending Account Code:** Click on the dropdown menu and select your agency
3. **Year:** 2011 or select the current calendar year
4. **Period:** select the number that represents the month you are running.

1 = JANUARY	7 = JULY
2 = FEBRUARY	8 = AUGUST
3 = MARCH	9 = SEPTEMBER
4 = APRIL	10 = OCTOBER
5 = MAY	11 = NOVEMBER
6 = JUNE	12 = DECEMBER

iv Click on the **OK** button

Drilling Down in Reports

For certain items in a report, you can drill down to view information specific to that item or you can drill down to generate a separate report for the item. For example, in invoices, you can drill down on *resource units* to open a report that breaks out the units by *identifier*. Your selection will determine how the report is sorted and totaled.

Note • *Try using different identifiers to select the information that best suits your needs.*

The icon becomes a hand when you point to an item that enables you to drill down to another report.

To drill down in a report

1. Whenever your cursor/pointer is over the usage in the **UNITS** column it turns into a hand. This means that you can drill down to view additional detailed information. Hover the cursor over the units on a selected line item in the report and double-click.

2. A separate window will appear and parameters will need to be set for the report first. Here are some examples of the identifiers that could be used, but not limited to:

COMPUTING & STORAGE IDENTIFIERS	
SERVICE	IDENTIFIER
Disaster Recovery	PLATFORM SERVICECODE ACCOUNT_CODE SERVERNAME APPLNAME SERVERBILLINGGROUP NOTES
Distributed Servers – Floor Space (Sq ft) **Distributed Servers – Appliance** **Distributed Servers – Physical Local** **Distributed Servers – Physical Remote** **Distributed Servers – Virtual Local** **Distributed Servers – Vender Owned** **Distributed Servers – Virtual Remote** **Distributed Servers – zLinux Hosting Fee**	PLATFORM SERVICECODE ACCOUNT_CODE SERVERNAME APPLNAME SERVERBILLINGGROUP
Disk Storage Mainframe Disk (MB/Day)	ACCOUNT_CODE DSN_ACCOUNT_CODE_1 (returns 1st 4digits of dataset name) DSN_ACCOUNT_CODE_2
Disk Storage Tier 1 (GB) **Disk Storage Tier 2 (GB)** **Disk Storage Tier 3 (GB)**	PLATFORM SERVICECODE ACCOUNT_CODE SERVERNAME APPLNAME
ISeries Midrange Servers – Support **ISeries Midrange Servers – Standard**	PLATFORM SERVICECODE ACCOUNT_CODE SERVERNAME APPLNAME SERVERBILLINGGROUP
Mainframe Batch CPU Minutes	ACCOUNT_CODE RACF_USER_ID JOBNAME
Mainframe CICS CPU Minutes	USERID TRANSACTION ID
Mainframe DAS ROSCOE CPU Minutes	ACCOUNT_CODE

Mainframe DB2 CPU Minutes	ACCOUNT_CODE PLAN_NAME AUTHORIZATION_ID
Mainframe TSO CPU Minutes	ACCOUNT_CODE RACF_USER_ID
PSeries Midrange Servers – Standard **PSeries Midrange Servers – Non-Standard** **PSeries Midrange Servers – Support**	PLATFORM SERVICECODE ACCOUNT_CODE SERVERNAME APPLNAME SERVERBILLINGGROUP
Tape Storage Mainframe (MB/Day)	ACCOUNT_CODE ACCOUNT_1
Tape Storage Tier 4 (GB)	PLATFORM SERVICECODE ACCOUNT_CODE SERVERNAME APPLNAME
PASS THROUGH/CHARGEBACK/ADJUSTMENTS	
Disk Storage Hardware Pass Through **Distributed Servers Hardware Pass Through** **ISeries Midrange Hardware Pass Through** **Mainframe Hardware Pass Through** **PSeries Midrange Hardware Pass Through**	PLATFORM SERVICECODE ACCOUNT_CODE SERVERNAME APPLNAME SERVERBILLINGGROUP NOTES
Disk Storage Software Pass Through **Distributed Servers Software Pass Through** **ISeries Midrange Software Pass Through** **Mainframe Software Pass Through** **PSeries Midrange Software Pass Through**	PLATFORM SERVICECODE ACCOUNT_CODE SERVERNAME APPLNAME SERVERBILLINGGROUP NOTES
Distributed Servers Professional Services Chargeback **Mainframe Professional Services Chargeback** **PSeries Midrange Professional Services Chargeback**	ACCOUNT_CODE DESCRIPTION
Disk Storage Labor Chargeback **Distributed Servers Labor Chargeback** **ISeries Midrange Labor Chargeback** **Mainframe Labor Chargeback** **PSeries Midrange Labor Chargeback** **Security Labor Chargeback** **System Architecture Labor Chargeback**	ACCOUNT_CODE DESCRIPTION
Any line item with “Adjustment” in the title	ACCOUNT_CODE DESCRIPTION

NETWORK SERVICES IDENTIFIERS	
SERVICE	**IDENTIFIER**
Network Circuit Charges	ACCOUNT_CODE BILLING_NBR USOC QUANTITY UNITCOST
Network Other Charges and Credits	ACCOUNT_CODE TSO CHARGEDATE BILLING_NBR DESCRIPTION

VOICE SERVICES IDENTIFIERS	
SERVICE	**IDENTIFIER**
Voice – Calling Card Charges	ACCOUNT_CODE BILLING_NBR CALL_DATETIME CALLED_NBR CALL_DURATION
Voice – Conference Service Charges	ACCOUNT_CODE BILLING_NBR CALL_DATETIME CALLED_NBR CALL_DURATION
Voice – Directory Assistance Charges	ACCOUNT_CODE BILLING_NBR CALL_DATETIME CALLED_NBR CALL_DURATION
Voice – Flat Rate Billing Charges	ACCOUNT_CODE BILLING_NBR INSTALLDATE USOC QUANTITY
Voice – In State Charges	ACCOUNT_CODE BILLING_NBR CALL_DATETIME CALLED_NBR CALL_DURATION
Voice – Labor Services Charges	ACCOUNT_CODE BILLING_NBR TSO USOC QUANTITY
Voice – Megacom 800 Charges	ACCOUNT_CODE BILLING_NBR CALL_DATETIME CALL_DURATION
Voice – Other Charges and Credits	ACCOUNT_CODE BILLING_NBR CHARGEDATE TSO DESCRIPTION
Voice – Out of State Charges	ACCOUNT_CODE BILLING_NBR CALL_DATETIME CALLED_NBR CALL_DURATION
Voice – Preventative Maintenance Charges	ACCOUNT_CODE BILLING_NBR TSO INSTALLDATE USOC
Voice – Readyline Charges	ACCOUNT_CODE BILLING_NBR CALL_DATETIME CALL_DURATION
Voice – SDN Long Distance Charges	ACCOUNT_CODE BILLING_NBR CALL_DATETIME CALLED_NBR CALL_DURATION
Voice – Station Equipment Charges	ACCOUNT_CODE BILLING_NBR

	TSO USOC QUANTITY
Voice - Toll Collect Charges	ACCOUNT_CODE BILLING_NBR CALL_DATETIME CALLED_NBR CALL_DURATION
Voice - Toll DDD Charges	ACCOUNT_CODE BILLING_NBR CALL_DATETIME CALLED_NBR CALL_DURATION
Voice - Toll International Charges	ACCOUNT_CODE BILLING_NBR CALL_DATETIME CALLED_NBR CALL_DURATION
Voice – Telephone Company Charges	ACCOUNT_CODE BILLING_NBR CALL_DATETIME CALLED_NBR CALL_DURATION

3 If you run a report and realize that you do not have the right information, click on **Return** at the top of the screen to take you back to the parameters page. You can enter in different identifiers.

To drill down to another report:

1 Place the cursor on the appropriate item in the report. For example, an account code or resource units.

2 Click the item. Depending upon item that you pick, the report either appears in the same browser window or in a separate window. If the report opens in a separate window, the parameters page for the report appears first.

Closing the Drill Down View

To close the drill down view in a report:

Click the close button ☒ in the upper-right corner of the browser or click **Return** to go back to the parameters page, then click **Cancel** on the parameters page and this will prompt a dialog box asking if you would like to close the window.

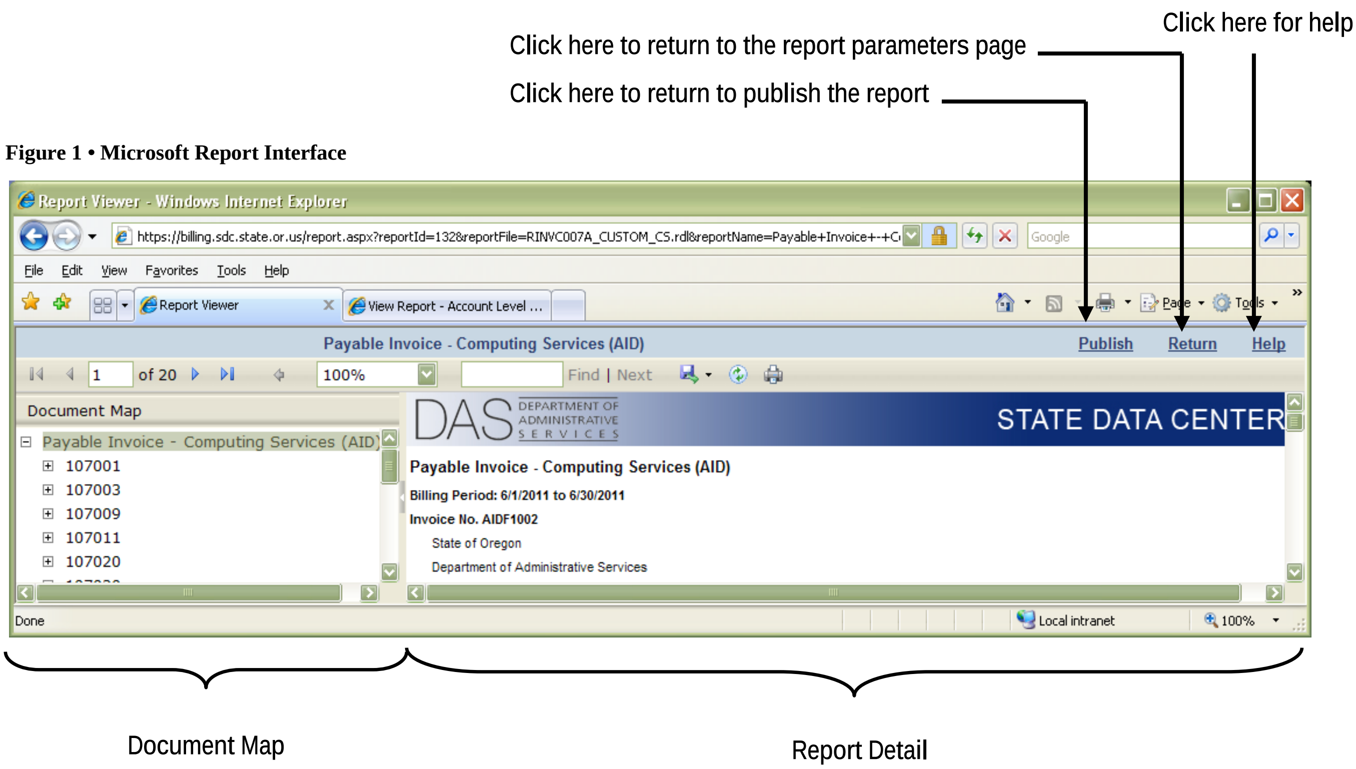
Working with the Report Interface

This section describes how to navigate and use reports. Except where noted, the information in this section is applicable to all report types.

Using the Reporting Toolbar

Figure 1 provides an introduction to the Microsoft reporting interface used with the TUAM application. The use of the interface, including how to use the toolbar, is discussed in the following sections.

Figure 1 • Microsoft Report Interface



Printing/Exporting a Report/Invoice

To print the Payable invoice or other reports in TUAM, click on the export icon and select PDF. This will open the invoice into a pdf application, such as, Acrobat or ECopy. Once this is open in the pdf application, you will need to follow the normal procedure for printing documents for the particular pdf application you are using.

If you want to export data into an Excel spreadsheet, select EXCEL in the drop-down menu and click on the EXPORT link.

Note • *Always use the PDF option on the report toolbar. If you use the print command in the File menu on your browser, it will not print properly.*

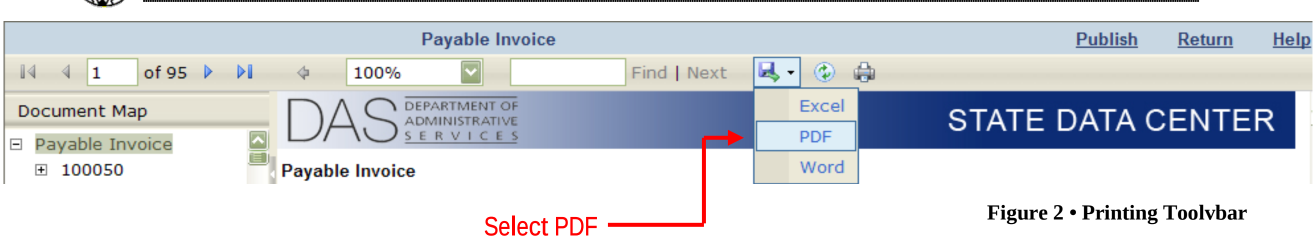
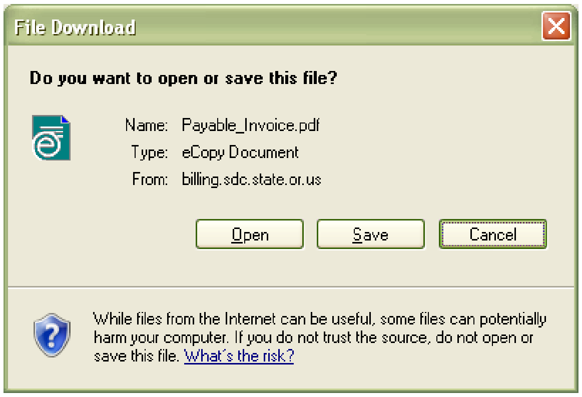


Figure 2 • Printing Toolvbar

A dialog box will appear prompting to open, save or cancel. Select OPEN or SAVE.



Navigating a Report

To navigate through the pages of the report, click the page arrows or type a page number.

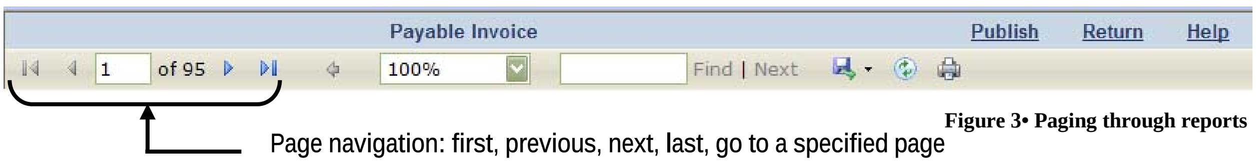


Figure 3• Paging through reports

Zooming In or Out

To enlarge or shrink the size of the information displayed, click the drop-down menu and select the size you want the information to display.

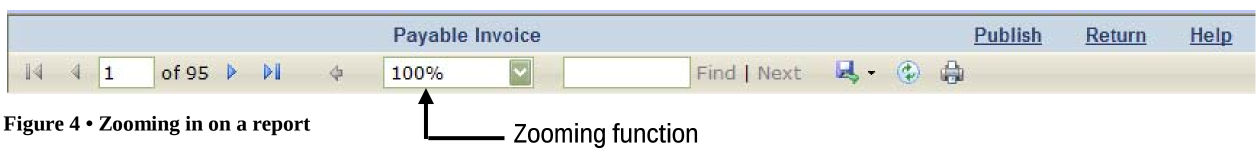


Figure 4 • Zooming in on a report

Searching Text in a Report

To search for text in the TUAM reports, type the text that you want to search and then click Find. To do an "find next" function, click Next.

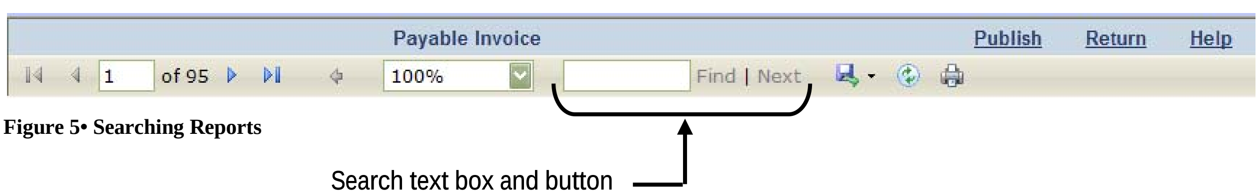


Figure 5• Searching Reports

Working with Favorite Reports

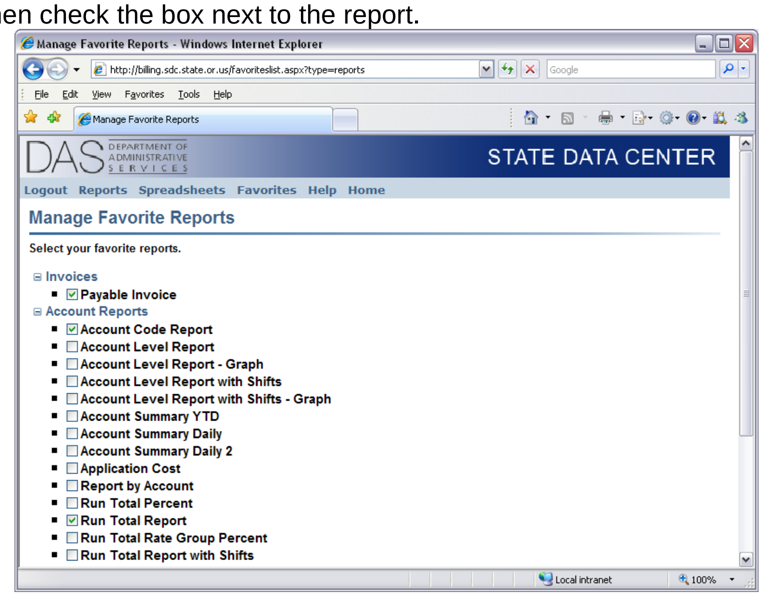
You can designate reports as favorite reports. This feature enables you to easily access favorite reports from the Favorites page or from shortcuts in the left frame of the home page.

Note • *Although you can designate multiple reports as favorites, only the first five reports that you add as favorites will appear on the home page.*

To add a report as a favorite

1 Click **Favorites → Manage Favorite Reports**

2 On the *Manage Favorite Reports* page, expand the report group that contains the report that you want, and then check the box next to the report.



3 Click Save.

The report is designated as a favorite.

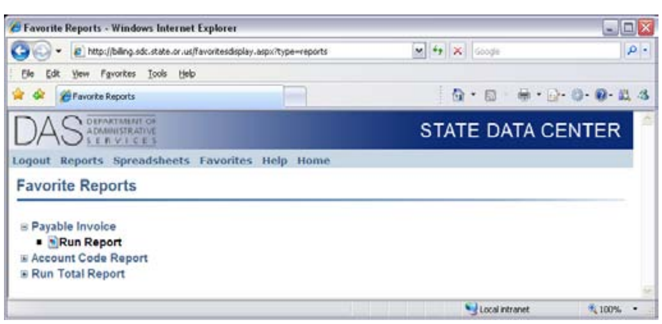
To access and run your Favorite reports go to:

1 Reports→Favorite Reports

2 Click the ⊞ next to the report you want to run

3 Click on ▪ **Run Report**

4 Then following the instructions for selecting parameters.



Contact Information

TUAM access

Email sdc-billing@state.or.us

TUAM password reset

Email sdc-billing@state.or.us

Voice (AIT)/Network(AIN) billing questions

Email sdc-billing@state.or.us
Or call 503-378-6926

Voice (AIT)/Network(AIN) cost center changes

Email sdc-billing@state.or.us

Computing & Storage (AID) billing quesitons

Email sdc.servicedesk@state.or.us.

SDC Rates and Service Catalog

http://www.oregon.gov/DAS/SDC/rates.shtml