

OIT Business Office
Billing Support Services
Service Usage Management
System
(SUMS)

- * Description of SUMS
- * Goals of SUMS
- * Training Objectives
- * Requesting Access
- * System Requirements
- * How to Access SUMS
- * Report Hierarchy

* SUMS Training Agenda

- * Running Reports
- * Saving and Exporting Reports
- * Support
- * Helpful Hints

* SUMS Training Agenda (continued)

- * SUMS is a web-based usage and billing system that provides on-line user access to service usage information.
- * The information is the same that you have received in the past in hard copy format.
- * Detail on unit costs and usage data is shown with a drill down.
- * There are many report options that can be saved or printed to the user's desktop.

* **Description of Service Usage Management System**

- * To provide on-line access to usage data at the summary and detail level.
- * Allow users the ability to see data on a daily basis.
- * Allow users the ability to track individual usage costs and make comparisons to prior months, years, etc.
- * Allow users the ability to plan costs by maintaining historical data.

* Goals of Service Usage Management System

- * How to Log-In to SUMS

- * How to select reports

- * How to navigate views within the reports

- * How to save reports

- * **Training Objectives**

* Requesting Access

- * Each agency has been asked to identify one individual who would be the access manager for the agency. This individual will be the contact person with the billing unit.
- * There is a form on the web to add, change or delete agency user information. (link)
- * The completed form may be e-mailed to Billing Support Services from the user agency's access manager.
- * The requests will be processed and confirmed via email.

*** To request access to SUMS**

Service Usage Management System (SUMS)

Request to Add/Delete/Change Access

In order to access SUMS each individual must be granted access by the user agency and the OIT Billing Services Unit. To gain access, please complete the following information:

Agency:
Full Name:
User ID:

This is the user Standard Sign-On (ex: first.lastname@das.ohio.gov)

Email :
Phone:
Title:
Group:

(Five digit OAKS Number: example DAS01)

Check One: Add a new user/ Change Information/ Delete a user

/ /

Approved by User Agency Access Administrator:

Name: Title:
Phone Number: Email:

Email completed form to Chris Wells @ christopher.wells@das.ohio.gov. You will be notified by email when the person is added/changed/deleted from access to the system.

* Accessing SUMS

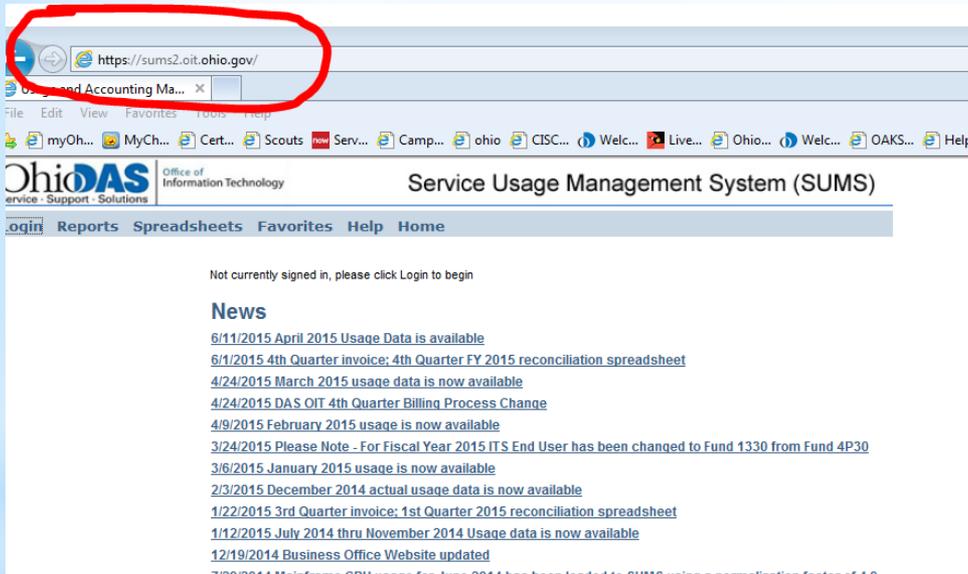
- * Internet Explorer versions 7 and 8
- * Access authorized through OIT Business Office, Billing Support Services

* System Requirements



Gaining Access to SUMS

<https://sums2.oit.ohio.gov/>
/



Login to SUMS using the using Internet explorer within the Ohio Network

<https://sums2.oit.ohio.gov/>

There is also a link on the DAS/OIT website for SUMS.

- * This is where the Billing Services Office will announce the availability of the current monthly invoice
- * Provide links to information that will aid in the use of the Service Usage Management System
- * Announce new releases of reports, etc.

* NEWS

- * Hover your mouse over “Reports”
- * Move the mouse down to “Run Reports” and left click



Get to the log in screen

* Login to SUMS

User ID will be your Active Directory (Single Sign On a) ID and password .
You will enter ODNNT\and your State User ID. (This is your email name.)

https://sums2.oit.ohio.gov/login.aspx?ReturnUrl=%2freportlist.a

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Service

Login Reports Spreadsheets Favorites Help Home

Login

User ID

Password

Login

Enter your SUMS UserID

Enter your SUMS Password

* Logout of SUMS

The screenshot shows the Service Usage Management System (SUMS) web application. The browser address bar displays <https://sums1.oit.ohio.gov/default.aspx>. The page header includes the OhioDAS logo and the text "Office of Information Technology" and "Service Usage Management System (SUMS)". A navigation menu at the top contains "Logout", "Reports", "Spreadsheets", "Favorites", and "Help Home". The "Logout" link is circled in red. Below the navigation menu, a welcome message reads: "Welcome Melinda Hurst, you are currently signed on as m.hurst." A "News" section follows, listing various updates with dates and details about CPU usage data being loaded to SUMS. A "Favorite List" sidebar is visible on the left, containing a bar chart and text about chargeback information. At the bottom of the page, a red arrow points from the "Logout" link to the text "Click to end session". The Windows taskbar at the bottom shows several open applications, including "Usage and Account...", "Document1 - Mic...", "Sent Items - Mel...", and "SUMSTraining - ...". The system clock in the bottom right corner shows "2:02 PM 6/24/2014".

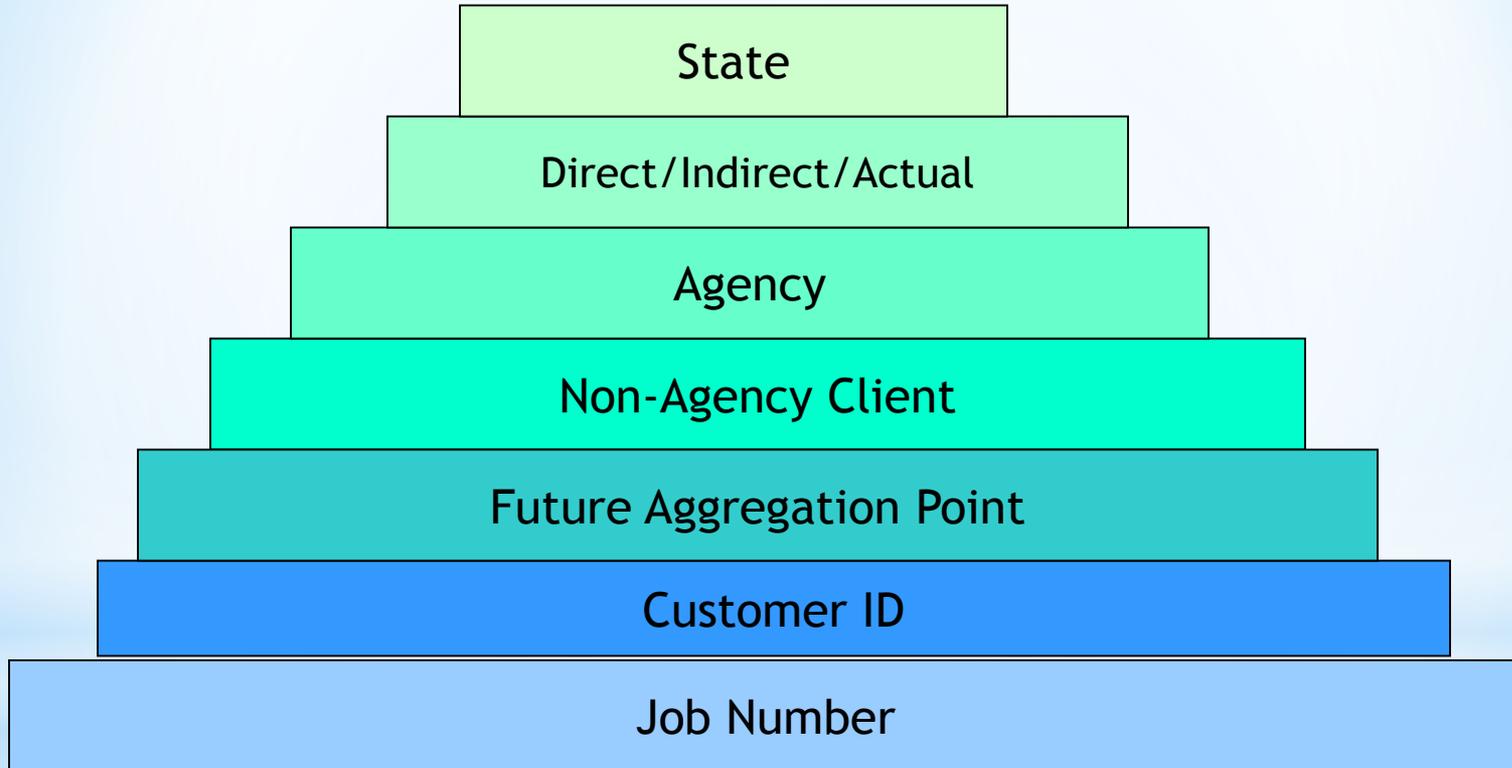
* Report Hierarchy

How the data is presented in the Service Usage Management System

- * All data has been organized based on a unique reporting hierarchy, based on the State of Ohio financial codes.
- * This hierarchy allows the user to request reports at high levels (summary information) or at the detail level down to the job number.
- * You can specify the level of account data you wish to return as a parameter for each report.

* Report Hierarchy

* State Of Ohio Aggregation Hierarchy



Sample Account code: OH.DIR.DAS01.00000000.0000.C420.CS4241

- * Level 1 - The 2 digit code to denote Ohio
- * Level 2 - A 3 digit code used to identify a direct, indirect, or actual usage cost.
- * **Level 3** - Is the 5 digit OAKS number used to identify the state agency.
- * Level 4 - For non-state agency clients who have access to their invoice data.
- * Level 5 - Position holder for future needs
- * **Level 6** - Customer ID - A four digit number controlled by the user agency.
- * **Level 7** - Job Number - The alpha/numeric six digit code used to track specific costs.

Report Hierarchy Description

*The account code for the Administrative Services would be:

OH.USE.DAS01.00000000.0000.C301.CS0301 Computer Usage Actual Usage

* **Sample Account Code**

- * State agencies can only see their data. When a state agency is entering account data to run a report, the account code will start with:
- * OH.USE.XXXXX
- * The XXXXX is the five digit OAKS number assigned to the agency.

* **Sample Agency Account
Code**

* Account Code Structure

The Account Code Structure (ACS) is a string of alpha-numeric characters that has been organized based on the State of Ohio financial codes.

The ACS allows the user to request reports at both a summary and/or detail level. A user can specify the level of detail for each report.

The financial codes are separated using a <per.iod> into the following categories: State, Type, Agency/Non-Agency, Future Aggregation Point,

Customer ID, and Job Number. Each of these items and a sample breakdown are below:

Sample Account Code: OH.DIR.DAS01.00000000.0000.C420.CS4241.0000000000

State	Type	Agency	Non-Agency Client	Aggregation	Customer ID	Job Number
OH	DIR	DAS01	0000000	0000	C420	CS4241

State: This code "OH" represents the State of Ohio.

Type: This field represents the type of invoice that was issued. There will be one of three codes in this field. They are defined below:

- DIR: this code indicates the invoice amounts.
- USE: this code is used to report actual consumption coinciding with the invoiced amount.
- EXC: this code represents that the invoice is an "Exchange" bill. DAS/OIT has made an agreement with the Customer to exchange a type of service for equipment transferred or purchased. This is accomplished utilizing a Memorandum of Understanding.

* Sample Invoice Below



Office of
Information Technology

Intrastate Invoice

OAKS Vendor ID: DAS01

ISTV Cross Reference: DASB

Payable to:

Treasurer of State
DAS Finance – Room 4060
30 E Broad Street,
Columbus, Ohio 43215-3414

DAS - Custom Invoice with Job Number - Detail

Invoice Number : 144P30C39003

Date Range: 3/1/2014 to 3/31/2014

Computer Usage billing questions: Melinda Hurst (614) 644-3149
MARCS billing questions: Deanna Moore (614) 644-0589

OH.DIR.DAS01.00000000.0000.C390.777347

Department of Administrative Services

Attn: [REDACTED]

30 E Broad St., 39th Floor
Columbus, OH 43215

	<u>Units</u>	<u>Rate</u>	<u>Charge</u>
ITS END-USER SUPPORT	59.00	210.0000	12,390.00
ITS END-USER LIMITED USE CONTRACTORS	434.00	135.0000	58,590.00
INFORMATION TECHNOLOGY SERVICES			70,980.00

Total for: OH.DIR.DAS01.00000000.0000.C390.777347 70,980.00

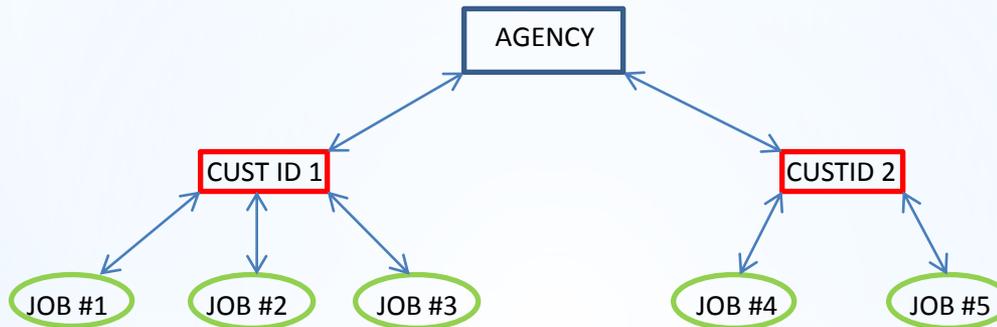
Invoice Total 70,980.00

State	Type	Agency	Non-Agency Client	Aggregation	Customer ID	Job Number
OH	DIR	DAS01	0000000	0000	C390	777347

AGENCY STRUCTURE SETUP

Overview: DAS/OIT invoices are billed at the Customer ID (CUSTID) level. This allows an agency to separate funding and/or costs within their established divisions/sections/offices/programs/systems, etc. Once the CUSTID is established, that division/section/office/programs/systems, etc., may establish a further breakdown of the costs by job number, i.e., accounting lines, cost pools, special projects, etc. These are at the discretion of the agency and DAS/OIT will accommodate your requests.

Description:



Customer ID: A distinct number assigned to each agency with defining parameters for a specific address. An agency may have multiple customer IDs.

Job Number: This field has alpha and/or numeric codes used by an assigned Customer ID so the customer may easily track costs by funding source, i.e., special projects, etc.

* Invoice number structure

- * Fiscal Year (2 digits)
- * DAS OIT Fund billing the agency (4 digits)
- * Customer Number (4 digits)
- * Month of the invoice (2 digits)

151330100210

FY15

DAS Fund 1330

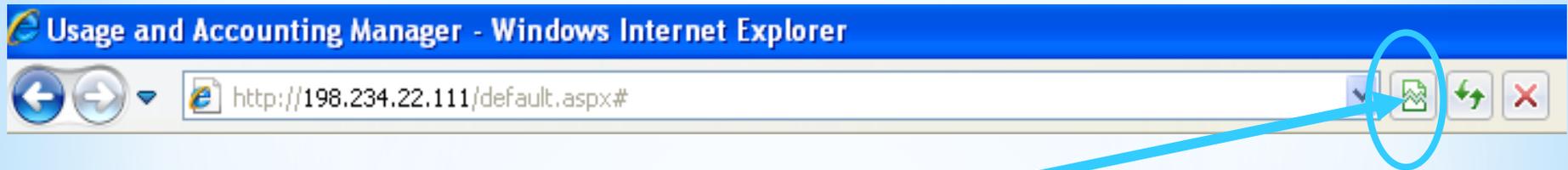
Customer 1002

October (Q2)

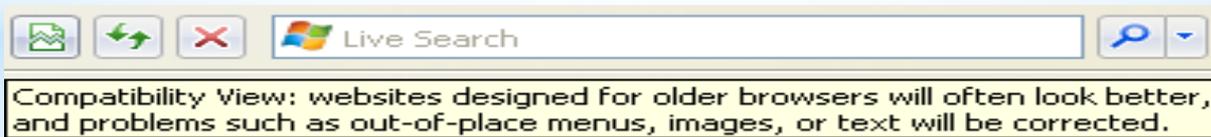
* Service Usage Management System

Running Reports

To correct the compatibility setting, go the IE address bar



Click on the box with the broken page and a text box appears. This will correct the viewing issue



* Opening “run reports” will show a menu of report topics

https://sums2.oit.ohio.gov/reportlist.aspx?type=reports

Run Reports

File Edit View Favorites Tools Help

myOh... MyCh... Cert... Scouts Serv... Camp... ohio CISC... Welc... Live... Ohio... Welc... OAKS...

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Service Usage Management System (SUMS)

Logout Reports Spreadsheets Favorites Help Home

Run Reports

- ⊕ OIT Standard
- ⊕ Invoices
- ⊕ Account Reports
- ⊕ Top Usage Reports
- ⊕ Variance Reports
- ⊕ Trend
- ⊕ Resource Detail
- ⊕ Other
- ⊕ Custom
- ⊕ Unassigned Reports

* OIT Standard Reports

* **Report List**

Run Reports

OIT Standard

- DAS Customer Invoice
- Infrastructure Invoice with Job Number
- DAS 2290 Invoice – Governance and Acquisitions
- MARCS Invoice
- Infrastructure Invoice
- DAS 4P30 Invoice – DAS ITS
- DAS 2290 Job Number Invoice – Governance and Acquisitions
- DAS 5C20 Job Number Invoice - MARCS
- DAS 1330 Job Number Invoice – Infrastructure Services
- DAS 4P30 Job Number Invoice – DAS ITS
- Usage – Infrastructure Services
- Detailed Billing Report
- Run Total Invoice
- Service Usage YTD
- Summary Crosstab - Charges
- Summary Crosstab - Usage
- Run Total Percent
- Monthly Cost by Service group
- Monthly Usage by Service
- Weekly Crosstab - Charges
- Weekly Crosstab - Usage
- Monthly Crosstab - Charges
- Monthly Crosstab - Usage
- Top 10 Bar Graph
- Top 10 Pie Chart
- Cost Trend by Rate
- Application Cost

*Service Usage Management System

Invoices

DAS Customer Invoice

Select parameters

Starting Account Code Custom

Ending Account Code Custom

Set the Date Range

From 

To 

Select:

The Account
Code Level

The range of Account
Codes

The Date Range

* Expand at arrows for a menu of selections

Account Code Level	State, length 2	of
Starting Account Code	State, length 2	of
Ending Account Code	Direct/Indirect, length 6	of
Invoice Number	Agency, length 12	
Set the Date Range	Non-Agency Client, length 21	
From	Future Aggregation Point, length 26	
	Customer ID, length 31	
	Job Number, length 38	
	Master Station(Voice), length 49	

Set the Date Range	Previous Period	
From	All	
	Current Period	
To	Previous Period	
	Fiscal Year	
	Fiscal Year-to-Date	
	Previous Fiscal Year	
	Previous Fiscal Year-to-Date	
	This Month	
	This Month-to-Date	
	Last Month	
	Current Year	
	Current Year-to-Date	
	Previous Year	
	Today	
	Yesterday	
	This Week	

Date range may be selected from drop down or calendar or typed

DAS - Custom Invoice

Invoice Number : 144P30039006
Date Range: 6/1/2014 to 6/30/2014
Computer Usage billing questions: Melinda Hurst (614) 644-3149
MARCIS billing questions: Deanna Moore (614) 644-0589
OH.DIR.DAS01.00000000.0000.0390 - GSD/OPF Multiple Facilities

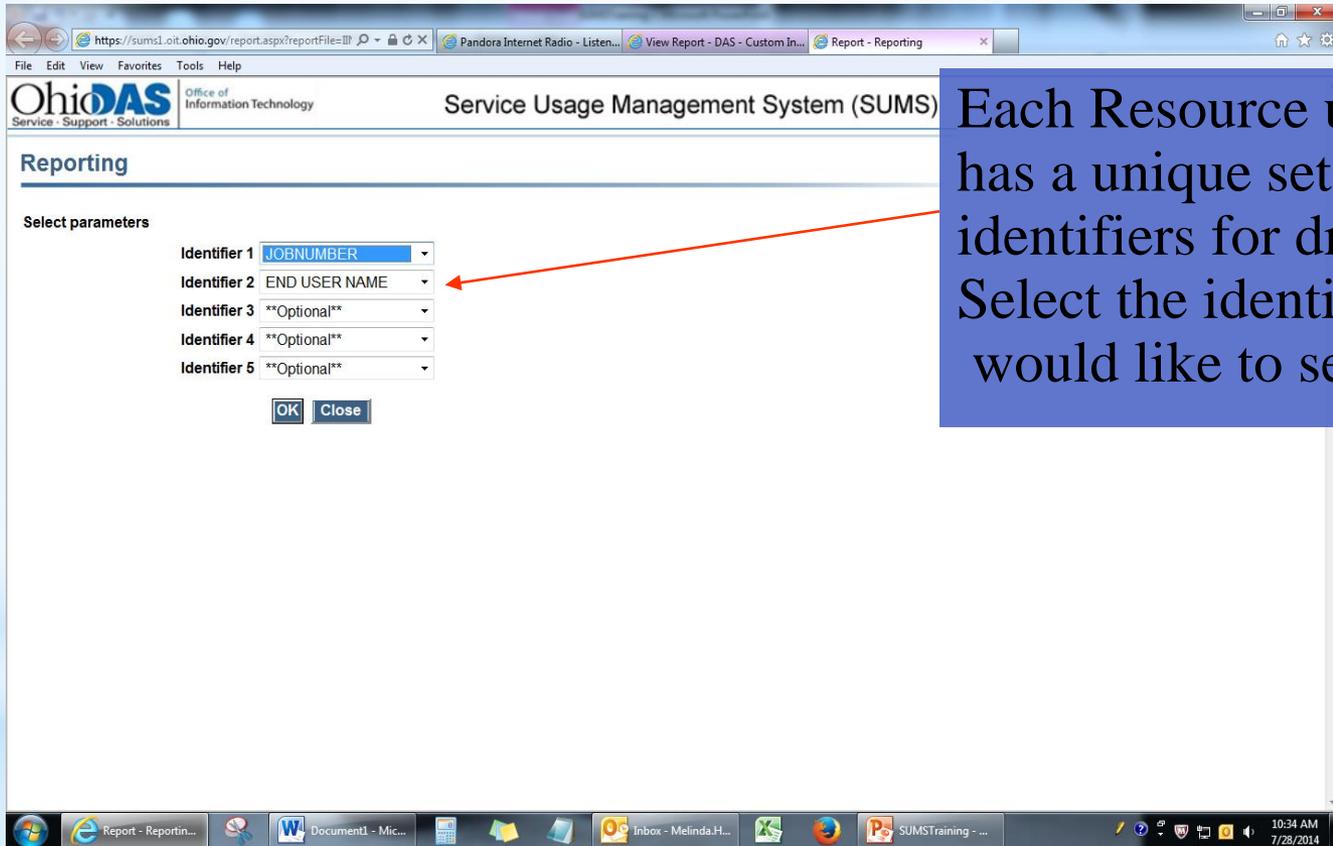
GSD/Facilities
Attn: Accounts Payable
4200 Surface Road
Columbus, OH 43228

	Units	Rate	Charge
ITS END-USER SUPPORT	10.00	210.0000	2,100.00
ITS END-USER LIMITED USE CONTRACTORS	3.00	135.0000	405.00
INFORMATION TECHNOLOGY SERVICES			2,505.00
Total for: OH.DIR.DAS01.00000000.0000.0390 - GSD/OPF Multiple Facilities			2,505.00

Run On: Monday, July 28, 2014 Page: 1

Click on units to drill down for additional detail

* Example of using the identifiers for specific information.



Each Resource unit billed has a unique set of identifiers for drill down. Select the identifiers you would like to see.

Document Map

- Reporting
 - 777289
 - 777355

OhioDAS Office of Information Technology
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Intrastate Invoice

Payable to:
Treasurer of State
DAS Finance – Room 4060
30 E Broad Street,
Columbus, Ohio 43215-3414

OAKS Vendor ID: DAS01
ISTV Cross Reference: DASB

Invoice Detail

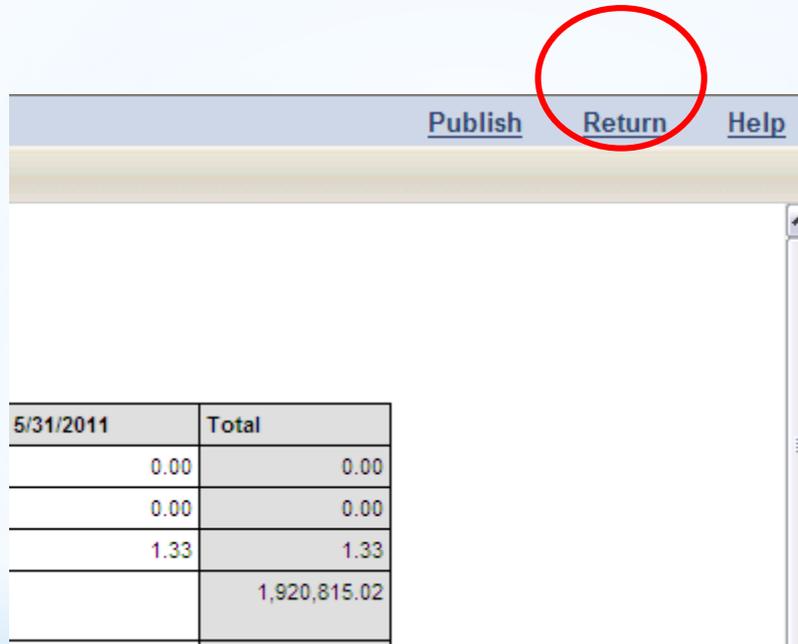
OH.DIR.DAS01.00000000.0000.0390
ITS END-USER SUPPORT
Billing Period: 6/1/2014 to 6/30/2014
JOBNUMBER

END USER NAME	
777289	
TOPPINGS, CLAUDE E	1.00
777289	1.00
777355	2.00
GAYLORD, LYNN	1.00
HASEMEYER, MARK	1.00
JOHNSON, DAISY	1.00
Mitchell, Alisa	1.00
Ritterbeck, Patricia	1.00
SZMANIA, RUTH	1.00
WALLACE, RACHAEL	1.00
777355	9.00
Total	10.00

Run On: Monday, July 28, 2014

Page 1 of 1

- * When you leave a report, always use the Return Key, never use the back arrow.



The screenshot shows a web application interface. At the top, there is a navigation bar with three buttons: "Publish", "Return", and "Help". The "Return" button is circled in red. Below the navigation bar is a table with two columns: "5/31/2011" and "Total". The table contains four rows of data.

5/31/2011	Total
0.00	0.00
0.00	0.00
1.33	1.33
	1,920,815.02

*Service Usage Management System

Account Reports

* Crosstab Reports

Report List - Microsoft Internet Explorer

Address <http://167.210.164.12/reportlist.aspx?type=reports>

Usage and Accounting Manager

Logout Reports Spreadsheets Favorites

Reports

- [-] Invoices
- [-] Account Reports
 - [-] Account Summary YTD
 - [-] Account Summary Daily
 - [-] Account Summary Daily 2
 - [-] Summary Crosstab - Charges
 - [-] Summary Crosstab 2 - Charges
 - [-] Summary Crosstab - Usage
 - [-] Summary Crosstab 2 - Usage
 - [-] Daily Crosstab - Charges
 - [-] Daily Crosstab - Usage
 - [-] **Weekly Crosstab - Charges**
 - [-] **Weekly Crosstab - Usage**
 - [-] Monthly Crosstab - Charges
 - [-] Monthly Crosstab - Usage
- [-] Top Usage Reports
- [-] Variance Reports
- [-] Trend
- [-] Resource Detail
- [-] Other

Weekly Crosstab reports display usage and/or charges by Client by week.

Define the Accounts to be displayed

Define the days to be included in the report

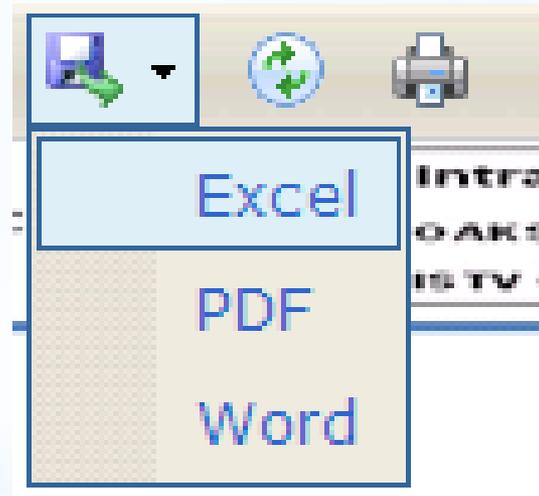
Weekly Crosstab - Charges
 Lowest Possible Account - Highest Possible Account
 Date Range: 6/1/2014 to 6/30/2014

	6/1/2014	6/8/2014	6/15/2014	6/22/2014	6/29/2014	
OH.DIR.ACC01 - The Accountancy Board - OAKS ID ACC01	OHIO GOV BACKBONE CONNECTION				191.07	
	INTERNET BANDWIDTH PASS-THROUGH				5.00	
	LAN CONNECTIVITY SERVICES				531.90	
	EXCHANGE/OUTLOOK MAIL SERVICES BASIC/CORE (300MB)				45.00	
	EXCHANGE/OUTLOOK MAILBOX STORAGE ABOVE 1 GB				3.85	
	SHARED FILE AND PRINT SERVICES	3.45				
	ITS APPLICATION PROGRAMMING					232.00
	ITS DESKTOP SERVICES					744.00
	Account Total	3.45			0.01	1,752.82
	OH.DIR.ADJ01 - The Adjutant Generals Office - OAKS ID ADJ01	MAINFRAME CICS CPU	0.02			0.01
MAINFRAME CICS REGION CPU					0.01	
SECURE AUTHENTICATION SERVICES					40.00	
Account Total		0.02			0.01	40.01
OH.DIR.AGE01 - Department Of Aging - OAKS ID AGE01	RELEASE AND PERMIT FEE 4th Quarter FY14				340.07	
	APPLICATION INTEGRATION SERVICES - END POINTS	3,660.61				
	APPLICATION INTEGRATION SERVICES - MESSAGES	2,190.99				
	APPLICATION INTEGRATION SERVICES - KB	3,466.67				
	MAINFRAME CICS CPU	0.13	0.03		0.42	0.04

* Service Usage Management Reports

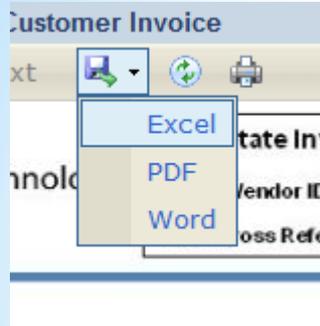
Saving and Exporting Reports

- * The menu bar allows you to export, refresh or save the report selected.



Select the format which you want the report saved and click.

* Saying Reports



Reports can be saved in PDF, Excel or Word formats.

Do you want to open or save DAS Customer Invoice.pdf from sums2.oit.ohio.gov?

Open

Save

Cancel

x

Click “Save” or “Open”.

- * Each category within the menu of reports can be expanded to view individual reports.
- * Invoice reports can be used for drill down based on units only.
- * Account Reports contain the crosstab series, reports which are useful for validation and analysis.
- * Top Usage and Variance reports key on dollar amounts so will not return effective results if no rates have been applied to the usage.
- * Trend Reports have versions which track dollars and versions which track usage. The usage is shown across a calendar year.
- * Resource Detail reports offer the user limited ad hoc reports using parameter driven queries. Results are presented in a predefined format.

* Reports overview

* Most Frequently Accessed Reports

* Invoice report

- * To view usage at the job number level

* Monthly Crosstab - Charges or Usage

- * Display charges or usage by month across time period requested

* Support Process

Staff in the Billing Support Services Unit will be the first responder to questions about the information on SUMS.

You can call the unit or send a question via email or submit a question via csc@ohio.gov

For questions on SUMS, you can call or email one of the following:

csc@ohio.gov

614-644-6860 or 877-644-6860

* Support Contact
information

- * Your user sign-on and password will be the standard sign-on to your system.
- * If there is a plus sign, a hand or if the item is highlighted in blue, you can drill down to a lower level of detail.
- * Once you click to start a report, do not re-click. Wait until the report has appeared to proceed.
- * Reports are listed by period, not month, for the fiscal year. Period 1 is July, Period 12 is June.

* Helpful Hints for Using SUMS