



Frequently Asked Questions (FAQ) for Tableau Customer Dashboard

Q: What DAS data is being reporting in this dashboard?

A: All the consumption data that is supplied by DAS IT service areas and approved by the Office of Finance is reported on through the Tableau Customer Dashboard. Most non-IT DAS services have been or are actively being integrated into the Costing and Billing System (CABS) following the Phase II release, such as Fleet Management or State Printing.

Q: How current is the data in these dashboards?

A: All consumption data in the dashboards are current up through the previous day. The data is refreshed at 10:00 PM to capture that days' worth of activity.

Q: How do I login to the dashboard?

A: Going through MyOhio.gov, login using your State issued ID and password, then select the four, gray squares in the top, right-hand corner. Under Tableau Enterprise, click on Launch App. In the new tab that opens, enter your SOUID again. Finally, select DAS Fiscal. If you are not able to login, please contact the Customer Service Center (CSC) at csc@ohio.gov or call (614) 644-6860 detailing who requires access including your SOUID.

Once your access is set up and you are logged in, select your agency from the dropdown. If you do not see your agency OAKS designation, please contact the Customer Service Center (CSC) at csc@ohio.gov or call (614) 644- 6860 so it can be made available to you.

Q: What is the difference between the Customer Dashboard and the Customer Invoice Dashboard?

A: The Customer Dashboard is a high-level view of the units and charges incurred related to the consumption of DAS rated services. While it is possible to get more detailed information via drilldowns, it does not contain as many attributes as the Customer Invoice Dashboard.

The Customer Invoice Dashboard provides a similar functionality as the backup that accompanies each DAS invoice and appended to the accounts payable voucher in OAKS. However, it can act as a central repository of all these invoices. This can allow for more direct comparisons between invoices or allow for more detailed reviews without having multiple files open.

Q: Why does the dashboard reflect usage with an invoice number that is not in OAKS?

A: There is an additional approval step following the CABS invoicing process before invoicing data is completed in OAKS. This can cause temporary differences between the two systems that can persist for up to three business days.

Although rare, there may be instances where a refund is owed for an incorrect charge. DAS makes every attempt to credit incorrect invoices before payment is made.

Q: How do I limit the scope of the report to display more specific information?

A: Utilizing the filters will allow you to locate specific consumption data more easily. For example, filtering by Class "AIX" will show all the AIX related OIT services. Using the Billing Frequency filter



can allow you to see the annual, quarterly, or monthly services or all of them at once.

Q: Is there a way to see additional details for a specific invoice?

A: Yes. Under the Customer Detail table, you can drilldown into the details that make up the charges that were generated through CABS.

Q: Where can I view the actual invoice related to these charges.

A: You can view any of the invoices that are referenced in the dashboard by going into OAKS FIN or OAKS Financials. OBM Shared Services will append to your Accounts Payable voucher a PDF version of your invoice and the document breaking out the charges within two business days. If there are no attachments, please contact the Customer Service Center (CSC) at csc@ohio.gov or call (614) 644-6860.

Q: Can I export the information from this dashboard?

A: Yes. You have the option to export either the dashboard itself or the data populating the dashboard.

Clicking on the Download button in the top, right corner of the gray command ribbon while in the dashboard view and selecting the option the suits your needs will enable you to export the dashboard. Under the Customer Details table, click on the Customer AdSeqT. This will take you to the drilldown of the entire dataset for you as a customer. Make sure you have selected any of the cells in the Tableau drilldown view. Then click on the Download button in top, right corner of the gray command ribbon. Finally, select the export option that suits your needs.

Q: Why is there a break in the trend lines, then they continue in a different color?

A: This dashboard view includes projections for periods that have yet to happen. The break in the trend line is where the actuals stop, and the projections start. The change in colors denotes which line is representative of actuals and which is representative of projections.

Q: How are the projections calculated?

A: Tableau is calculating these projections based on your consumption as reported by the DAS service areas and charges as of the previous day using a moving average. This includes capturing calculations that utilized previous fiscal year's rates. As more data is populated, this average will adjust based off the most recently available data. Any variance to consumption or revisions to established rate amounts will impact the projections.

Q: Where can I locate more information or additional resources?

A: DAS publishes resources at das.ohio.gov/rates to provide you with communications regarding the release of this Tableau Customer Dashboard, the approval of new rates and/or services, and other helpful links. These FAQ will be available in addition to a link to the dashboard.

Q: How do I notify you of concerns including billing issues or questions on the data I am seeing?



A: Please contact the Customer Service Center (CSC) at csc@ohio.gov or call (614) 644-6860. Agencies are expected to notify the Office of Finance of any usage disputes within 30 days of the charges being invoiced through OAKS. All discrepancies will be reviewed by the service area providing the service and the Office of Finance to determine action required.