



## User Guide

December 01, 2010

### **Note:**

**Comprehensive IT Goods and Services - Online Bill Access Application will replace Direct Bill – Online Bill Access Application. This user guide is a working document, and is being updated to reflect all the changes.**

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## I. Comprehensive IT Goods And Services - Online Bill Access Introduction

### A. Overview of Application:

Starting with the January 2006 billing period (first bill produced in Feb 06), VITA Direct Billing Services (IAT) Bill will be replaced by the Comprehensive IT Goods and Services Bill.

Currently VITA is billing in-scope agencies for direct costs of IT Goods & Services and IT Payroll Services provided. Each agency's bill is based on payments made by VITA towards IT Goods & Services procured and costs incurred for IT Payroll Services for a particular Agency.

VITA will be entering into "Memorandum of Understanding (MOU)" with each agency. MOU rates will be based on Direct Bill personnel costs, travel, training and other overhead costs. MOU fees will be phased-in to replace the IT Payroll service charges when an agency signs an MOU. Agencies will continue to receive IT Payroll service charges until an MOU is signed.

VITA Comprehensive IT Goods & Services application uses the procurement data entered by the Agency in eVa, Virginia's statewide e-procurement application and the payroll data from CIPPS, Statewide Payroll and Leave System to prepare the data required for "VITA Comprehensive IT Goods & Services Bill". This data will be used to generate the VITA Comprehensive IT Goods & Services IAT, the IT Goods & Services Invoice Detail Report and the IT Payroll Invoice Detail Report.

VITA Customers and Agencies can access VITA Comprehensive IT Goods & Services IAT and Invoice Detail Reports online through the Comprehensive IT Goods & Services - Online Bill Access Application.

### B. Description:

Comprehensive IT Goods & Services - Online Bill Access Application is an internet application which can be accessed by VITA customer billing contacts and other designated personnel to view, and download VITA Comprehensive IT Goods & Services IAT and Invoice Detail Reports.

Starting with the January - 06 Billing period (first bill produced in Feb 06), VITA Comprehensive IT Goods & Services (IAT) Bill and Invoice Detail Reports will be available online for the customers to access. Comprehensive IT Goods and Services Bill will include charges for the following items:

- ☐☐IT Goods & Services (including Invoice Detail Report)

- ☐☐IT Payroll Services (including Invoice Detail Report) **or** Memorandum of Understanding (MOU) Fees

**Note:** MOU fees will be phased-in to replace the IT Payroll service charges when an agency signs an MOU. Agencies will continue to receive IT Payroll service charges until an MOU is signed.

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In the future, the Comprehensive IT Goods and Services Bill will also include:

- Miscellaneous charges that are currently billed through the Miscellaneous Billing Application
- IT Investment Management (ITIM) Fees for Higher Education
- IT Security Management (ITSM) Fees

Implementation date for these new items is to be determined.

- VITA Comprehensive IT Goods & Services (IAT) Bill will be available in Adobe PDF (.pdf) format.
- IT Goods and Services Invoice Detail Report and IT Payroll Invoice Detail Report will be available in Adobe PDF (.pdf) format and in Comma Delimited (.csv) format.

## C. Application Functionality

Comprehensive IT Goods & Services – Online Bill Access will replace the Current Direct Billing Services - Online Bill Access Application. Comprehensive IT Goods & Services – Online Bill Access is an internet application which can be accessed by VITA customer billing contacts and other designated personnel to view, and download VITA Comprehensive IT Goods & Services IAT and Invoice Detail Reports.

Depending on the access privileges granted to the user Comprehensive IT Goods & Services - Online Bill Access Application provides the following functionality:

1. VITA Identity Manager (VIM) based user access (Secured Access)
2. Role based user privileges (Access to single or multiple agency / customer information).
3. Comprehensive IT Goods & Services IAT and Invoice Detail Reports, online presentation to agencies / customers.
4. Search for Bills (Comprehensive IT Goods & Services Bill IAT's, Invoice Details Reports and previous Direct Bill IAT's and Invoice Detail Reports)
5. View and Sort Search Results.
6. View and Download Comprehensive IT Goods & Services Bill IAT's, Invoice Details Reports and previous Direct Bill IAT and Invoice Detail Reports.
7. Online instructions, online help resources, and links to other useful resources.

Comprehensive IT Goods & Services - Online Bill Access Application consists of the following screens:

1. Log In
2. Bill Browser
3. Help
4. Log Off

## II. How to Access Comprehensive IT Goods & Services - Online Bill Access Application

### A. Business Overview Of Access

Access to Comprehensive IT Goods & Services - Online Bill Access is controlled and is based on the user access privileges. There are several different types of access.

Depending upon user role, access is provided to:

1. Single Agency or Multiple Agency or All Agencies
2. Access to Comprehensive IT Goods & Services Bill IAT and Invoice detail reports in Adobe PDF (.pdf) format
3. Access to Invoice detail reports in Comma Delimited (.csv) format

### Role based user privileges

User access to agency information, VITA Comprehensive IT Goods & Services Bills (IAT) and Invoice Detail Reports is controlled and is based on the user role. User role and access privileges are as follows:

1. Access to agency / customer information.
  - a. User with access to single agency will be able to access only bills of the agency for which they have been given access.
  - b. User with access to multiple agencies will be able to access bills of all the agencies for which they have been given access. User can view one agency data at a time and have the following options to select from:
    - i. Option to display agency/customer list by name or by number.
    - ii. Dropdown box with list of agencies / customers for which user is given access.
2. View and Download Comprehensive IT Goods & Services IAT and Invoice Detail Reports.
  - a. Bill Receivers will have access to the following:
    - i. View and Download Comprehensive IT Goods & Services IAT's in Adobe PDF (.pdf) format.
    - ii. View and Download Invoice Detail Reports in Adobe PDF (.pdf) format and Comma Delimited (.csv) format.
  - b. Bill Reviewers will have access to only Adobe PDF (.pdf) files.
    - i. View and Download Comprehensive IT Goods & Services IAT's in Adobe PDF (.pdf) format.
    - ii. View and Download Invoice Detail Reports in Adobe PDF (.pdf) format.

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- iii. Invoice Detail Reports in Comma Delimited (.csv) format are not available.
- c. Administrative Role (for example: VITA Billing Staff)
  - iii. Access to all agencies.
  - iv. View and Download Comprehensive IT Goods & Services IAT's in Adobe PDF (.pdf) format.
  - v. View and Download Invoice Detail Reports in Adobe PDF (.pdf) format and Comma Delimited (.csv) format.

### **B. Log On Procedure, How To Get Access: Accessing the Comprehensive IT Goods & Services - Online Bill Access Application**

A VITA Identity Manager (VIM) Account is required to access the Comprehensive IT Goods & Services - Online Bill Access Application. Once a VIM Account has been established, and access to Comprehensive IT Goods & Services - Online Bill Access has been granted, you are able to log into Comprehensive IT Goods & Services - Online Bill Access with your VIM Account user ID and password.

The Comprehensive IT Goods & Services - Online Bill Access Application login page can be found at the following URL: <http://www.vita.virginia.gov/services/busServe/onlineBilling.cfm>

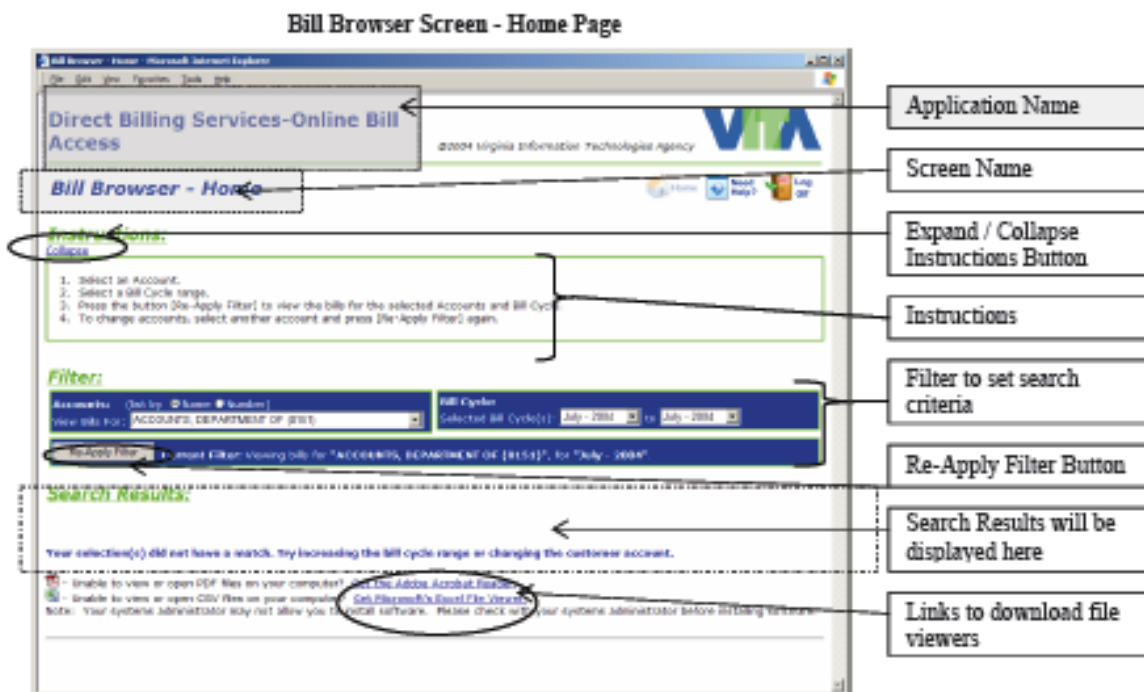
To request access, click the “Request Access” icon. This will take you to the VITA Identity Manager website. Follow the steps there to create your account, request access to Online Bill Access and other applications serviced by VITA Identity Manager.

If you already have a VIM account, you only need to click the “Login” icon in the upper right of the of the VIM toolbar.



## III. How to use Comprehensive IT Goods & Services - Online Bill Access Application – Bill Browser

Bill Browser screen will be displayed when users log on to the Comprehensive IT Goods & Services Online Bill Access Application. Bill Browser screen is the home page of Comprehensive IT Goods & Services - Online Bill Access Application.



### A. Screen Description Bill Browser Screen is divided into 3 main sections:

a. The top portion of the Bill Browser Screen provides onscreen instruction on how to use the Bill Browser

#### 1. Instructions

- Online Instructions on how to use the Bill Browser.
- **Expand / Collapse** link.
  - o Click on the **Expand** link to expand and view the instructions alternatively
  - o Click on the **Collapse** link to hide the instructions.



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- b. The middle portion of the Bill Browser Screen displays the name of the agency / customer, whose data is being displayed, and a provision to select the Bill Cycle Dates.

### 1. Filter

- Filter allows the user to set a search criteria:
  - o **Accounts** (Agency Name): Dropdown box with single agency / customer number is displayed. Only the agency / customer for which the user is given access is displayed in the Dropdown box
  - o **Bill Cycle Date**: Two Dropdown boxes are provided to select a bill cycle range
  - o **Re-apply filter** button is displayed

**Note:** For users with access to multiple agencies / customers the dropdown box lists names of all the agencies / customers for which the user is given access. Users can select and search one agency's bills at a time.

### 2. Search Results

- Search results are displayed in a table with the following column headings:
  - o View / Download Bill column
  - o File Type
  - o Bill Cycle
  - o Bill Name
  - o Invoice Date
- Bills per page: Select the number from the dropdown box to set the number of bills to be displayed in the search results table.
- Sort Search Results: Search results are sortable by
  - o Bill Cycle
  - o Bill Name
  - o Invoice Date

c. Bottom portion:

### 1. Tips and Helpful Links

- Comments, Tips:
  - o Comments and tips on Search results are provided for users references
- Download links:
  - o Users who do not have Acrobat Reader and Microsoft Excel installed can access the download site using these links
    - ☐ [Get the Adobe Acrobat Reader.](#)
    - ☐ [Get File Viewers for Microsoft Excel and Word.](#)
  - o Links to download Adobe Acrobat Reader and Microsoft Excel file Viewer are also provided on Bill Browser Screen.

### B. Using the Application's Functionality

#### 1. Set Search Filter Users can select search criteria using the following options:

- **Accounts:** (list by Name Number)

Users can select the radio button under the “Accounts list by” option to sort the agency / customer listing in the dropdown box either by agency name or by agency number

- **Agency / Customer Number**

Users can select the agency / customer using the dropdown box.

Only the Agency / Customer number for which the user is given access is displayed in the dropdown box.

**Note:** For users with access to multiple agencies / customers, the dropdown box lists names of all the agencies / customers for which the user is given access.

User can select and search for one agency's bill at a time.

- **Bill Cycle Date**

Users can select Bill cycle date using the two dropdown boxes provided to select a bill cycle range.

By default the two dropdown boxes display latest bill cycle date.

- **Re-Apply Filter**

User can click on the “**Re-Apply Filter**” Button to apply the selected search criteria.

The current filter settings are displayed next to **Re-Apply Filter** Button for user's reference.




## Search Results Table

Search results are displayed in a table with the following table headings

- **View / Download Bill column**

 **VIEW** and  **DOWNLOAD** are displayed on each row of the Search results.






Click on  **VIEW** to open and view the file.

 Click **DOWNLOAD** to download and save the file.

**Note:** Behavior of these buttons may vary for non-standard web browsers.

- **File Type**


The appropriate icon for any given file will be displayed in **File Type** column:

Adobe  PDF (.pdf)  
Microsoft Excel  XLS (.xls)  
Microsoft Word  DOC (.doc)  
Comma Delimited  CSV (.csv)  
Notepad/WordPad  TXT (.txt)

**Note:** Access to Adobe PDF (.pdf) format files and Comma Delimited CSV (.csv) file depends on the user role and user privileges.

**Note 2: Viewers for all files types are usually installed on the client computers, but can be found here if needed:**

- ☐ [Get the Adobe Acrobat Reader.](#)
- ☐ [Get File Viewers for Microsoft Excel and Word](#)

- **Bill Cycle** displays the Bill Cycle date and the Bill Period ID.
  - Standard Billing Cycle and Special Billing Cycle are also identified for user reference.
  - Bill Cycle is displayed in Month – Year – Bill Period ID format.
  - Bill Period 1 is the Standard Bill cycle
  -  Information icon is displayed next to the Bill Cycles label (Column heading). User can click on the icon to read more information on Bill Cycles.
  - By default search results are sorted on Bill Cycle date and are displayed in reverse chronological order.
- **Bill Name** displays the name of the bill or report that is referenced in that row.

Depending on user roles the following bill names will be displayed:

  - Comprehensive IT Goods & Services IAT (.pdf)
  - IT Goods and Services Invoice Reports (.pdf)
  - IT Goods and Services Invoice Data (.csv)
  - IT Payroll Invoice Reports (.pdf)
  - IT Payroll Invoice Data (.csv)
- **Invoice Date** displays the Invoice Date. Invoice Detail Reports
  - Rows will display the same Invoice date as their respective IAT.
  - Invoice Date on the IAT will match the Invoice Date displayed.

### 3. Sort Search Results

Users have the option to sort displayed search results. Search results can be sorted based on the following options:

- Bill Cycle
- Bill Name
- Invoice Date

**Note:** Filter will be re-applied every time you sort the search results.

- Click on the **Bill Cycle** label to sort search results by Bill Cycle.

Search Results will be sorted by Bill Cycle ID in the reverse chronological order (for example, September 2004, August 2004, July 2004, etc.). This is also the default search result sort.

- Click on the **Bill Name** label to sort search results by bill name.

Search Results will be sorted by bill name. This sort will be helpful to list all Comprehensive IT Goods & Services Bill IAT's, all IT Goods & Services Reports etc., together.

- Click on the **Invoice Date** label to sort search results by Invoice Date.

Search Results will be sorted by Invoice Date in the reverse chronological order.

### 4. View and/or Download Comprehensive IT Goods & Services Bill IAT, Invoice Detail Reports

The user has the option to view individual files (IAT or Invoice Details). Users will be able to access bills and reports that are displayed in the Search results table.

Depending on the user's role, the search results table on Bill Browser Screen will display the Comprehensive IT Goods & Services IAT in Adobe PDF (.pdf) format and Invoice Detail Reports in Adobe PDF (.pdf) format and Comma delimited (.csv) format.

Users can View and/or Download Comprehensive IT Goods & Services Bill IAT, and Invoice Detail Reports.

**Note:** Behavior of these buttons may vary for non-standard web browsers.

#### View Files

- User is required to specify the Search Criteria in one or more available Search Criteria fields and click on the **Re-Apply filter** to view search results.
- Review search results and identify the file (IAT or Invoice Detail Report) to view.
- Click on the **View** icon to view the respective file.

(Users can also click on the row to view that particular file)

a. If the associated file is a Adobe PDF (.pdf) file:

- File will be displayed in a separate browser window.

**Note:** If you are not able to open the file, Adobe Acrobat Reader is required to view an Adobe PDF (.pdf) format file. Link to download Adobe Acrobat Reader is available on the Bill Browser screen. Please check with your systems administrator before installing software.

b. If the associated file is a Comma Delimited (.csv) file:

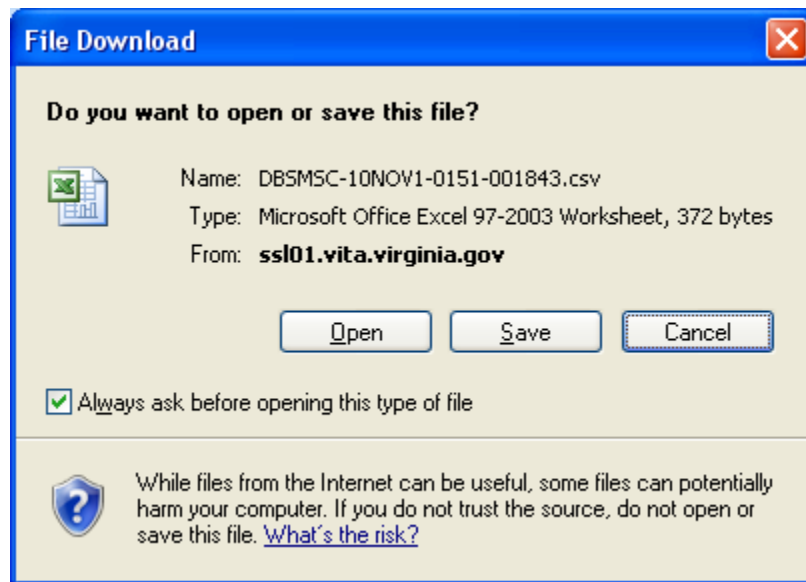
- File Download window will appear. In this window the user will be able to select from the following options:

?? **Open:** to open the Software Data file and View the Data.

?? **Save:** to save the Software Data file.

?? **Cancel:** to cancel the file download action.






- Click on Open Button of the File Download window to open the file.
  - File will be displayed in a separate browser window.
    - The downloaded file will be in Excel (.xls) format.
- Note:** If you are not able to open the file, Microsoft's Excel File Viewer is required to view a Comma Delimited (.csv) format file. Link to download Microsoft's Excel File Viewer is available on the Bill Browser screen. Please check with your systems administrator before installing software.

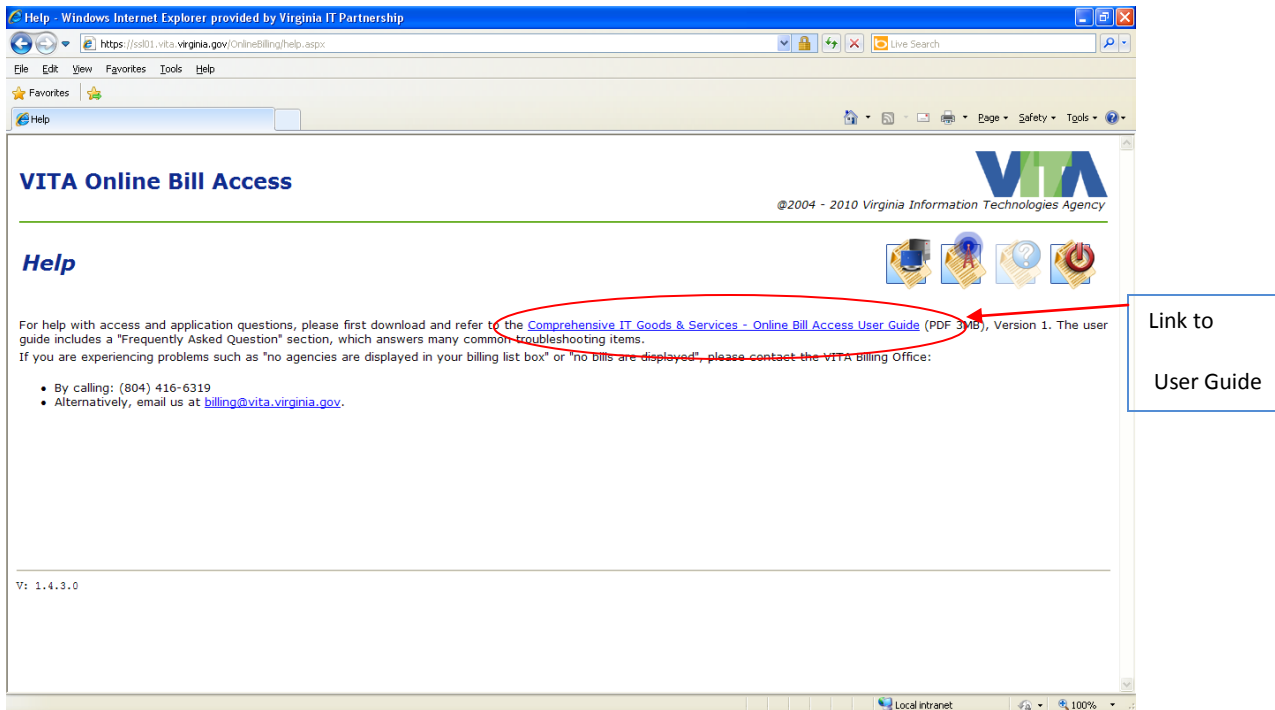
### Other options

- Click on Save Button of the File Download window to save the file.  
(Note you can also save the file from the "File Menu" if you opened it for viewing)
- Click on Cancel Button of the File Download window to cancel the View action.

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## IV. Help

- Click the Help icon  on top right corner of each of the application screens to access the Comprehensive IT Goods & Services - Online Bill Access Application Help screen.
- Help Screen will appear. See screen shot below



- Follow the instructions on the Help page to access additional help resources on Comprehensive IT Goods & Services - Online Bill Access Application.

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### **A. FAQ's**

#### **Q: I am able to see only bills for Agency number 00XXX.**

A: Access to Comprehensive IT Goods & Services - Online Bill Access application is restricted. User can only view bills of agencies for which they have been given access.

#### **Q: No bills present for a Billing Cycle?**

A: Following message will be displayed "Your selection(s) did not have a match. Try increasing the bill cycle range or changing the customer account". Invoices for any billing cycle are generated only if there are any billable transactions during that billing period.

#### **Q: I don't get an e-mail regularly?**

A: E-mails are sent to a Billing Contact (Bill Receiver and Bill Reviewer) only if an invoice is generated for a particular billing cycle. You will not receive an e-mail if there is no invoice for your agency in a particular billing cycle.

#### **Q: Only Adobe PDF (.pdf) files are displayed.**

A: User access to bills and reports is based on user role.

Bill Receivers have access to Comprehensive IT Goods & Services Bill IAT's in Adobe PDF (.pdf) file format and to Invoice Detail Reports in Adobe PDF (.pdf) file format and Comma delimited (.csv) file format.

Bill Reviewers have access to Comprehensive IT Goods & Services Bill IAT's and Invoice Detail Reports in Adobe PDF (.pdf) file format only. Invoice Detail Reports in Comma delimited (.csv) file format are not available for Bill Reviewers.

#### **Q: I am unable to view Adobe PDF (.pdf) files on your computer?**

A: Adobe Acrobat reader is required for view the Adobe PDF (.pdf) file. Links to download Adobe Acrobat reader are provided on Bill Browser Screen.

#### **Q: I am unable to view or open CSV files on your computer?**

A: Microsoft's Excel File Viewer is required to view comma delimited (.csv) files. Links to download Microsoft's Excel File Viewer are provided on Bill Browser Screen.

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### **Q: What are CSV files?**

A: A comma-separated values file, known as a CSV file, is a type of data format in which each piece of data is separated by a comma. This is a popular format for transferring data from one application to another, because most database systems are able to import and export comma-delimited data.

For example, data pulled from a database and represented in comma-delimited format looks something like the following. Each column value is separated by a comma from the next column's value and each row starts a new line. (Source: [www.pcwebopedia.com](http://www.pcwebopedia.com))

### **Q: I don't see Invoice Detail Reports for my Comprehensive IT Goods & Services Bill IAT for the May month bill cycle.**

A: Invoice Detail reports are generated for all the line items on the Comprehensive IT Goods & Services Bill IAT. Invoice Detail reports are generated only for the line items present on the Comprehensive IT Goods & Services IAT, giving detail supporting information for each line item on the Comprehensive IT Goods & Services Bill IAT. Invoice Detail reports are not generated for Adjustment entries (emergency credits and debits)

### **Q: We have procured IT Goods and Services and the item is not shown on the IAT?**

A: Customers will be invoiced only after the payment is made by VITA to the vendors.

### **Q: Descriptions on Invoice Detail Reports are wrong?**

A: Comprehensive IT Goods & Services application utilizes the eVa data entered by the customers, and the descriptions on Invoice Detail Reports are the same as entered by the customers. Please verify the same with your procurement department.

### **Q: Do I have to have a VIM account to access the Comprehensive IT Goods & Services – Online Bill Access Application?**

A: Yes, a VIM account is required to access the Comprehensive IT Goods & Services – Online Bill Access Application. Details to get a VIM user ID and password are provided on page 9 of this user guide. Current Direct Bill access Id and password can be used to access the Online Bill.

### **Q: We want to add a new billing contact (Bill receiver / Bill Reviewer)?**

A: Adding or changing a billing contact can be done using the Comprehensive Billing Services Contact Maintenance Form. Use the submit button at the bottom of the form to e-mail the request to VITA Billing Department. (Email address: [Billing@vita.virginia.gov](mailto:Billing@vita.virginia.gov)).

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### **Q: Where can I find the Billing Contact Maintenance From?**

A: Billing Contact Maintenance From can be accessed online @

[http://www.vita.virginia.gov/misforms/forms/vitadbs\\_bcc.cfm](http://www.vita.virginia.gov/misforms/forms/vitadbs_bcc.cfm)

### **Q: Whom should I contact regarding technical issues like:**

- Can't get access to Comprehensive IT Goods & Services – Online Bill Access Application.
- Password is not working.
- Bill don't display, unable to open bills

A: For all technical issues please contact the VITA Customer Care Center:

- Inside the Richmond Metro Area: 804-786-3932
- Outside the Richmond Metro Area: 1-866-637-8482
- Alternatively, email us at [vccc@vita.virginia.gov](mailto:vccc@vita.virginia.gov). Note: All tickets received through email are automatically assigned a low priority.

### **Q: Whom should I contact regarding Business / Billing Detail issues like:**

- Wrong agency shows up
- PO shows up; didn't order. Application uses eVA. First verify within eVA and with agency personnel that order did not originate from agency.
- Questions on payroll information, IT Goods and Services information, etc.?

A: For all Business / Billing Detail issues please contact the VITA Customer Care Center:

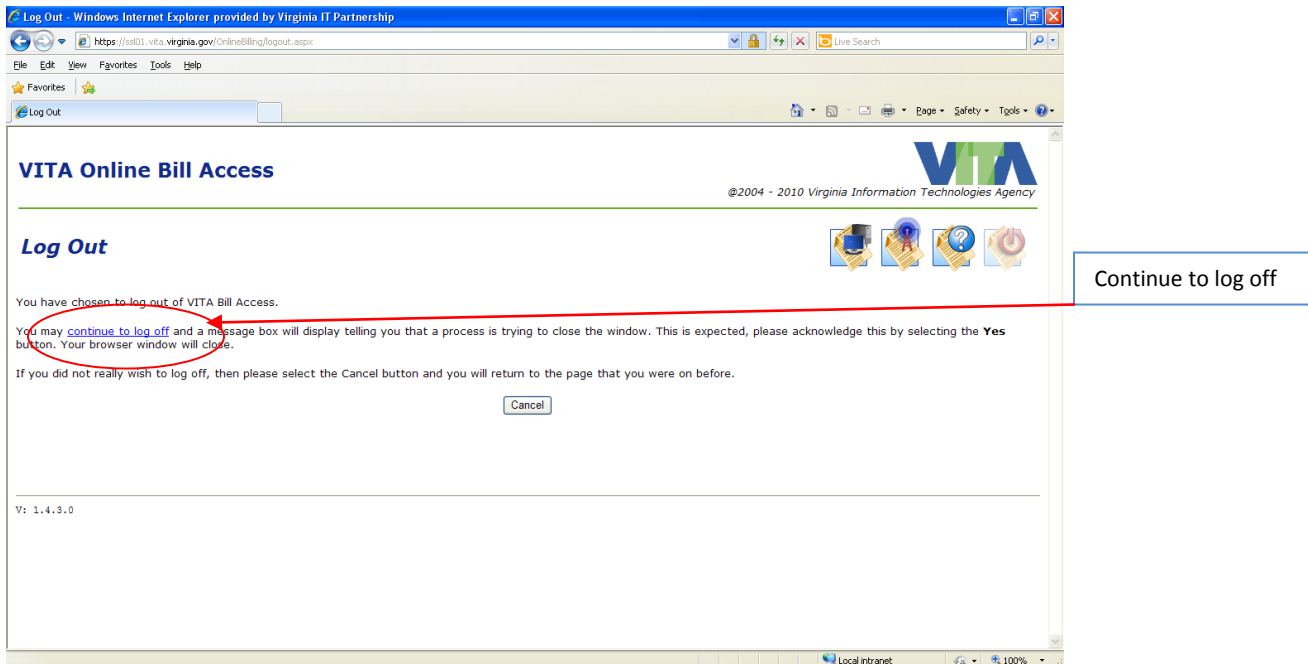
- Inside the Richmond Metro Area: 804-786-3932
- Outside the Richmond Metro Area: 1-866-637-8482
- Alternatively, email us at [vccc@vita.virginia.gov](mailto:vccc@vita.virginia.gov). Note: All tickets received through email are automatically assigned a low priority

### **Q: Why are our purchases not reflected in the current month IAT's?**

A: Agencies will be billed only after the payment is made by VITA to the vendors. Vendor payments are made after verifying the purchase order, vendor invoice and the agency receiver. A three way match is required in VITA's financial system to release the vendor payment.

### V. Log Out

- Click on the Log Off icon available on top right corner of each of the application screens to access the Log Out screen and to log out of the Comprehensive IT Goods & Services - Online Bill Access Application.
- Log Out Screen will appear. See screen shot below.

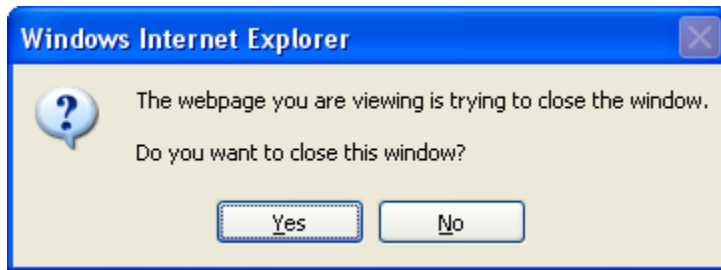


- Follow the instructions on the Log Out page to Log Out of the Comprehensive IT Goods & Services - Online Bill Access Application.
- Click on continue to log off link to continue the Log Off process.

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- A message box will be displayed with the following message
- “The web page you are viewing is trying to close the window, do you want to close this window?”



- Click on Yes to log off from the Comprehensive IT Goods & Services - Online Bill Access Application
- Click on No to remain on the Log Off page of the Comprehensive IT Goods & Services - Online Bill Access Application
- If you did not wish to log off, click on the Cancel button and you will return to the previous page that you were on before.