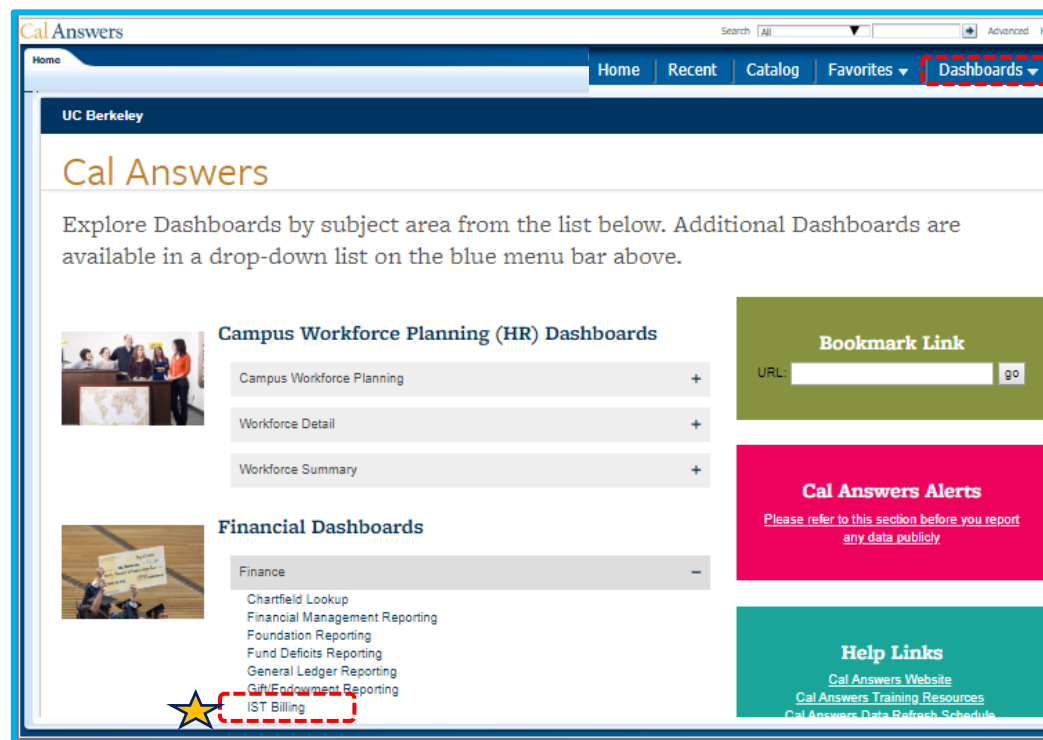


The **Cal Answers IST Billing** dashboard enables approved Cal Answers Finance users to view the monthly "recharged" (charged for the cost of providing the service) for certain services provided by Information Systems & Technology (IST). This dashboard provides the basis for these charges. Some are based on usage, others are recurring monthly charges and some are one-time charges for a particular service.

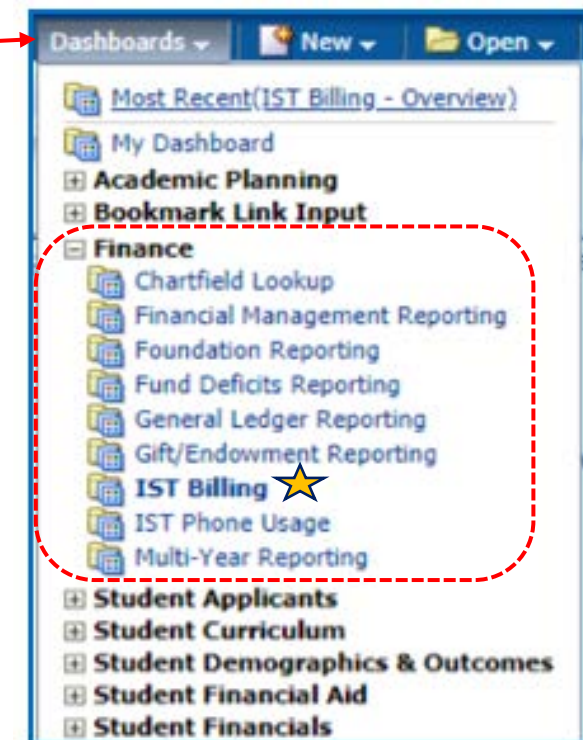
Approved **IST Billing** users will have access to campus-wide, global data sourced from Pinnacle (loaded monthly) and displayed in accounting (credit/debit) signage similar to the BAIRS Financials reports. Prompted filter values persist between the three IST Billing report tabs.

### Accessing the Cal Answers IST Billing Dashboard

1. Go to [calanswers.berkeley.edu](http://calanswers.berkeley.edu) to log into the Cal Answers tool. Chrome or Firefox are the recommended browsers.
2. Click on the **Log in** link on the Cal Answers home page and when prompted enter your CalNet ID and passphrase. This will take you to the Home page of the Cal Answers application.
3. From the **Financial Dashboards** section, click on **Finance** and then select **IST Billing**.

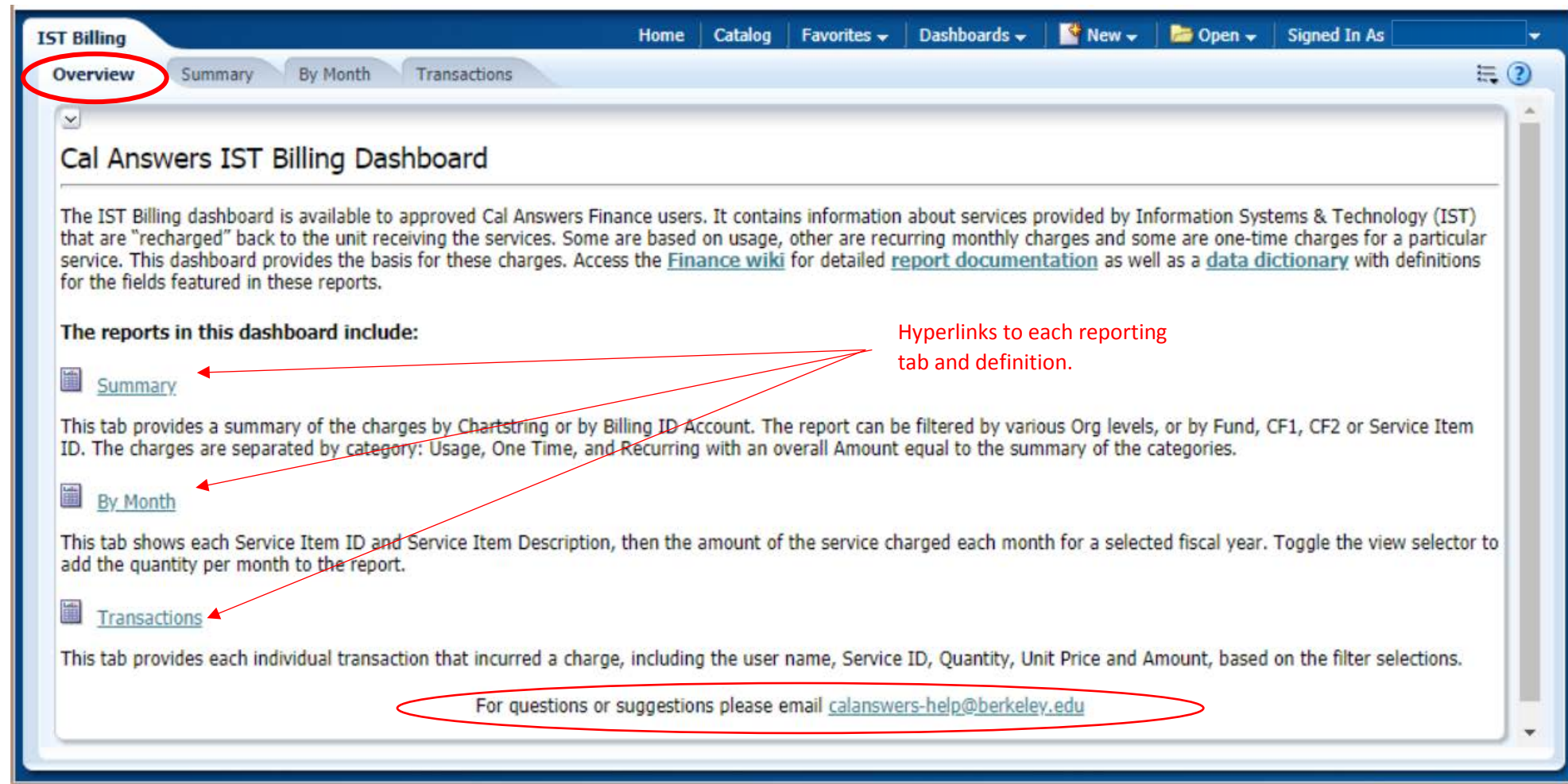


Note: **IST Billing** dashboard is also available from the Cal Answers **Dashboards** dropdown blue toolbar.



### 1. Overview Tab

The Overview tab is the starting point for the dashboard. It includes links to the reporting tabs, as well as descriptions of each tab. It also includes links to the **Finance Wiki** which provides Cal Answers Financials [IST Billing documentation](#) and a [data dictionary](#) for the filters and columns in the dashboard. It also includes the contact email for the help desk: [calanswers-help@berkeley.edu](mailto:calanswers-help@berkeley.edu)



2. Summary Report

The **Summary Report** tab provides a summary of charges by Chartstring or by Billing ID Account. The report also includes both the Service IDs and Service Item IDs and can be filtered by various Org levels, Funds, CF1, CF2 or Service Item IDs. The charges are categorized by Usage, One Time, and Recurring, and includes a total under Amount. When working with the filters, remove the dash in the **Dept ID- Desc** field.

When working with the filters, remove the - dash from the Dept ID- Desc field.

Choose from two views of data:

- By Billing ID Account
- By Chartstring

Toggle the view selector to include the quantity along with the amount per month to the report.

Select **Summary** prompts and then click **Apply** to retrieve data.

Right-click in data table, select **Include** column and one of the two *Includable* columns.

Billing ID Account	Chartstring	Service Id	Service Item Id	Usage	One Time	Recurring	Amount
<b>Report Total</b>				<b>\$16.56</b>	<b>\$1,139.62</b>	<b>\$7,673.56</b>	<b>\$8,829.74</b>
ACD VOICE MAIL			IF	\$0.00	\$0.00	\$3.00	\$3.00
ACD VOICE MAIL			MAINTPBX	\$0.00	\$0.00	\$4.00	\$4.00
ACD VOICE MAIL			RXCDL	\$0.00	\$0.00	\$16.24	\$16.24
ACD VOICE MAIL			TNAC	\$0.00	\$0.00	\$4.95	\$4.95
ACD VOICE MAIL			VMUM	\$0.00	\$0.00	\$4.50	\$4.50
<b>ACD VOICE MAIL Total</b>				<b>\$0.00</b>	<b>\$0.00</b>	<b>\$32.69</b>	<b>\$32.69</b>

Like your filtered and/or edited table report view?

Create a **Saved Customization** to apply again and again.

3. By Month Report

The **By Month Report** displays the **Service Item ID** and **Service Item Description** along with the amount of the service charged for each month of a selected fiscal year and filtered Org level. The **Service ID** may be included. View options allow you to toggle between displaying the **Amount** or the **Quantity and Amount per month** to the report.

Choose from two views of report data:

- Amount
- Quantity and Amount

Select **By Month** prompts and then click **Apply** to retrieve data.

CalAnswers

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IST Billing

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Overview Summary By Month Transactions

Fiscal Year 2018

Org Level3 --Select Value--

Fund Code --Select Value--

Org Level4 --Select Value--

Fund - Desc --Select Value--

Org Level5 --Select Value--

Chartfield 1 --Select Value--

Org Level6 --Select Value--

Chartfield 2 --Select Value--

Dept ID - Desc

Service Item ID --Select Value--

Dept ID --Select Value--

Apply Reset

Choose the view Amount

Service Item Id	Service Item Description	01 - Jul	02 - Aug	03 - Sep	04 - Oct	05 - Nov	06 - Dec	07 - Jan	08 - Feb	09 - Mar	10 - Apr	11 - May	12 - Jun	Total for the Year
Report Total		\$6,938.22	\$7,770.33	\$6,984.66	\$6,998.50	\$6,948.06	\$7,137.45	\$7,974.09	\$7,265.99	\$7,180.97	\$6,451.52	\$6,477.27	\$6,874.71	\$85,001.77
		\$90.05	\$5.18	\$8.14	\$13.84	\$6.24	\$4.66	\$6.62	\$154.58	\$5.00	\$6.45	\$43.77	\$17.72	\$362.25
1MBLS	Measured Rate Business Serv Line Shari	\$21.24	\$21.24	\$21.24	\$21.24	\$21.24	\$21.24	\$21.24	\$21.24	\$21.24	\$21.24	\$21.24	\$21.24	\$254.88
1MBSL	Business ISDN	\$71.58	\$71.58	\$71.58	\$71.58	\$71.58	\$71.58	\$71.58	\$71.58	\$71.58	\$71.58	\$71.58	\$71.58	\$858.96
ACDPBXALN	ACD PBX Agent Log-in	\$211.12	\$211.12	\$211.12	\$211.12	\$211.12	\$211.12	\$211.12	\$211.12	\$211.12	\$211.12	\$211.12	\$211.12	\$2,533.44

Choose the view Quantity and Amount

Service Item Id	Service Item Description	01 - Jul	02 - Aug	03 - Sep	04 - Oct	05 - Nov	06 - Dec	07 - Jan	08 - Feb	09 - Mar	10 - Apr	11 - May	12 - Jun
Report Total		\$6,938.22 5,037	\$7,770.33 5,084	\$6,984.66 4,906	\$6,998.50 4,997	\$6,948.06 5,288	\$7,137.45 5,915	\$7,974.09 6,198	\$7,265.99 6,169	\$7,180.97 5,797	\$6,451.52 920	\$6,477.27 934	\$6,874.71 966
		\$90.05 69	\$5.18 72	\$8.14 83	\$13.84 80	\$6.24 80	\$4.66 67	\$6.62 78	\$154.58 80	\$5.00 79	\$6.45 82	\$43.77 86	\$17.72 85
1MBLS	Measured Rate Business Serv Line Shari	\$21.24 2	\$21.24 2	\$21.24 2	\$21.24 2	\$21.24 2	\$21.24 2	\$21.24 2	\$21.24 2	\$21.24 2	\$21.24 2	\$21.24 2	\$21.24 2
1MBSL	Business ISDN	\$71.58 2	\$71.58 2	\$71.58 2	\$71.58 2	\$71.58 2	\$71.58 2	\$71.58 2	\$71.58 2	\$71.58 2	\$71.58 2	\$71.58 2	\$71.58 2
ACDPBXALN	ACD PBX Agent Log-in	\$211.12 13	\$211.12 13	\$211.12 13	\$211.12 13	\$211.12 13	\$211.12 13	\$211.12 13	\$211.12 13	\$211.12 13	\$211.12 13	\$211.12 13	\$211.12 13
ACDPBXANTS	ACD PBX Announcements	\$438.48 27	\$438.48 27	\$438.48 27	\$438.48 27	\$438.48 27	\$438.48 27	\$438.48 27	\$438.48 27	\$438.48 27	\$438.48 27	\$438.48 27	\$438.48 27

Rows 1 - 25

Print - Export

Blue arrows under the data table allow you to page down the rows or up the rows of the data table. Click the double sided arrow to display all rows of available data.



### 4. Transactions Report

The **Transactions report** displays each individual transaction that incurred a charge, including the chartstring, user name, Service ID, Quantity, Unit Price and Amount. Month and Fiscal Year are required filters and data can be pulled for one or multiple months in a single year.

The screenshot shows the IST Billing interface with the 'Transactions' tab selected. The 'Fiscal Year' is set to 2018 and 'Fiscal Month' is 01 - Jul. The 'Apply' button is highlighted. A red arrow points to the 'Apply' button with the text: 'Select Transaction prompts and then click Apply to retrieve data.'

On the left, a red arrow points to the 'Include column' option in the 'Includable Fields' menu with the text: 'Right click in data table -> Include column to display a list of Transaction report includable fields to customize report. Complete list of includable fields available in the [Wiki](#).'

At the bottom, a red arrow points to the 'Print' link with the text: 'Click the **Print** link and select **Printable PDF** for printing or **Printable HTML** for viewing and printing from your browser with additional formatting options.'

Another red arrow points to the 'Export' link with the text: 'Click the **Export** link to send the data to Excel. Select **Excel** format to download formatted data. Select **Data->CSV** format to download raw data.'

Account	Fund	Dept ID	Pro	CF1	CF2	Document Id	User Name	Service Id	Service Item Description	Frequency	Quantity	Unit Rate	Amount
<b>Report Total</b>													<b>\$8,829.74</b>
56011									Drupal Hosting-Basic	Recurring	1.00	\$20.00	\$20.00
56011									Drupal Hosting-Basic	Recurring	1.00	\$20.00	\$20.00
56011									AS-Consulting	One-Time Charge	1.00	\$82.00	\$82.00
56011									AS-Consulting	One-Time Charge	1.00	\$82.00	\$82.00
56011									AS-Consulting	One-Time Charge	1.00	\$82.00	\$82.00
56011									AS-Consulting	One-Time Charge	1.00	\$82.00	\$82.00
56011									Drupal Hosting-Basic	Recurring	1.00	\$20.00	\$20.00
56011									Drupal Hosting-Basic	Recurring	1.00	\$20.00	\$20.00
56011									IS-VM Additional RAM	Recurring	1.00	\$5.00	\$5.00
56011									IS-VM Base	Recurring	1.00	\$20.00	\$20.00
56011									IS-VM Storage Performance Tier	Recurring	42.00	\$0.19	\$7.98
56011									IS-WIN-StandardSupport Pkg	Recurring	1.00	\$100.00	\$100.00
56011									IS-WIN-System Admin Hourly Consulting	One-Time Charge	1.00	\$90.00	\$90.00
56011									DS-DB-Database Oracle Server Pkg	Recurring	1.00	\$332.00	\$332.00
56011									Calweb Farm Hosting Service	Recurring	1.00	\$90.00	\$90.00
56011									IS-WIN-CalShare Storage	Recurring	15.00	\$1.00	\$15.00
56011									IS-WIN-CalShare Website	Recurring	1.00	\$53.00	\$53.00
56011									IS-WIN-CalShare Storage	Recurring	1.00	\$1.00	\$1.00
56011									IS-WIN-CalShare Website	Recurring	1.00	\$53.00	\$53.00
56011									AS-Consulting	One-Time Charge	1.00	\$82.00	\$82.00