



CalTABS Survey Results

1. How often do you use the CalTABS System?

Use	Response Total	Response Percent
Daily	3	4%
Once a week	5	7%
Once a month	53	77%
Less than once a month	8	12%
Total	69	100%

2. How would you describe your experience navigating CalTABS?

Experience	Response Total	Response Percent
Hard to navigate	5	7%
Somewhat hard	11	16%
Somewhat easy to use	35	51%
Very easy to use	17	25%
Total	68	100%

3. Is the CalTABS System Useful?

Useful	Response Total	Response Percent
Not useful	5	7%
Somewhat useful	11	16%
Useful	35	52%
Very useful	16	24%
Total	67	100%

4. Is the CalTABS system an improvement from the prior monthly invoice delivery process (paper/mail)?

CalTABS Improvement	Response Total	Response Percent
YES	54	81%
NO	13	19%
Total	67	100%



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5. Have you used the on-line “Help” feature within CalTABS?

Used “Help” feature	Response Total	Response Percent
YES	16	24%
NO	50	76%
Total	66	100%

6. How useful is the on-line “Help” feature?

Help Feature	Response Total	Response Percent
Not useful	5	8%
Have not used this feature	42	70%
Somewhat useful	10	17%
Very useful	3	5%
Total	60	100%

7. Are the Invoice Detail Reports useful?

Inv Detail Useful	Response Total	Response Percent
YES	60	90%
NO	7	10%
Total	67	100%

8. Which Invoice Detail report format do you use?

Invoice Format	Response Total	Response Percent
PDF	50	76%
Excel	16	24%
Total	66	100%

9. If you were asked to change something in CalTABS what would you change?

Comment	Response
It's time consuming to download our invoices, so I would like to see a more efficient and expedient method for accessing our invoices.	The invoice summary and invoice detail by account code are published each month. Will explore alternatives for easier access.
Include the CalSTARS billing system invoices also.	The CalSTARS invoices are currently mailed to CalSTARS customers. OTech will be exploring the possibility of



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	including the CalSTARS invoices into the CalTABS system.
The item count (quantity) in some of the data is incorrect, e.g., Quantity vs. rate is reversed on CGEN circuits.	Enhancements to the billing source system are currently underway and this requirement has been identified to correct the quantity times rate for Network services.
Minor point, but if the title of the report could be displayed as the actual month (such as May 2013) rather than 2013-06 for example, on the published reports menu, that would be helpful.	The published reports folder name and YEAR-MO (2013-06) are generated by the system and cannot be modified at this time.
Include all the invoices for the agencies, not just some.	The invoices are presented based on your level of access. If you need access to view all of the invoices for your agency, submit a request to have your access changed to: ciobilling@state.ca.gov and we can modify your access to add other invoices that you need to view.
I print the detailed reports for my managers and it is not easy to determine which detailed reports correspond to our invoice. The detailed reports are listed by their codes but for at least one of our line items, the codes on the invoice do not match the codes in the detailed reports. Perhaps it would be easier if only the detailed reports that are listed on the invoice were available to choose from.	A comprehensive list of the Invoice Detail reports is available from the online Help feature within CalTABS under Report References
I would like to be able to run ad hoc reports on just my specific account codes. Admittedly, this may be a user training issue on my part!	For invoice detail reports the following parameters can be used to view all of your account codes; set the Account Code length of 15 in the Account Code Level:
<p>1) Output to xlsx rather than xls when exporting to Excel because of cell limitation.</p> <p>2) More field options when creating reports.</p>	<p>1). xlsx is not supported in the current version of the billing software product.</p> <p>2) The current options are standard fields that are programmed by the manufacturer. The parameter screen is for all customers to see, the screen must stay standard (no specific changes for specific customers. Any possible changes will need to be researched to determine if it can be programmed (system changes).</p>



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It would be nice to have a CGEN migrated fees in a separated listing.	The CGEN detail is available from “Run Reports”, Invoice Detail Reports, T700E CGEN Detail (Excel).
Maybe list invoices under its related group, instead on lumping all available invoices under one group. For example: Calftxfzx contains invoices for both invoices for customer with ID codes FTX and FZX.	The user id is assigned based on which invoices you need to view. Please contact ciobilling@state.ca.gov with your request.
The system should be able to quickly give a user access to multiple billing codes if needed, and it should be flexible enough to regenerate old invoices.	The way the system is set up (manufacturer design); users can see various groups of invoices when the user id/security is set up. This only works for future invoices. Invoices are generated only once; however, if a user requests access to more billing codes, historical invoice data can be provided upon request by sending an email to ciobilling@state.ca.gov .
Enhance reporting capability	We are working on adding more reporting features. Please send an e-mail to ciobilling@state.ca.gov and provide more detail.
For the C100E CPU detail report to have time of job runs.	Job time is not available for the billing software product.
I would like to be able to run all of the reports by account code. Right now only the INV103P report is by account code. I would like to be able to run say the M100P report by account code. Right now I have to specify the exact account codes to get them to page correctly.	The invoice detail reports are designed to be able to be produced for a specific account code or all account codes that you have defined. A generic parameter can be used to get all of your account codes by Invoice Detail report; enter your customer id as the account code and you will get all account codes: For Example: Starting Account Code: ZZX123456 Ending Account Code: ZZX123456 Set the Account Code to length of 15

10. Do you require any information that is not currently provided in CalTABS? Please provide the information that would be useful to you.

Comment	Response
Do a follow-up training session. One geared to the students questions now that we have used this system for a while.	Will seek customer interest and provide CalTABS training sessions as needed.



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Occasionally I need more details on my bill's line items. For example: training charges on my invoice could use actual attendee names.	The detail reports are intended to provide detail on a specific charge. For example, the detail for Training Charges is included in the X301 Debit/Credit detail report and it normally includes the student name. If you need additional detail, please contact us at ciobilling@state.ca.gov for more detail.
I would like to and from date for each month	The billing month is shown on the invoice summary. The detail reports list the billing date as appropriate. Please e-mail ciobilling@state.ca.gov if you have any questions.
The detail reports should include more detail about the service provided.	For a detailed service description, please review the Service Catalog for more detail about the service provided.
Definition of account structure	Please refer to the online 'Help' feature, under 'Report References'; Account Code Structure is defined in this document.
Billing broken out by location; credits within the account code that is being credited.	Debit/Credit detail for the month is located in the X301 Debit/Credit detail report.
I would like the ability to get the invoices in the same format like we got the printed reports. Summary, detail and then all of the detail information (server, VPN, etc. details by account code) by account code.	The invoice format and amount of detail is the same. The Invoice Summary and Invoice Detail by Account Code are available from the 'Published Reports'. All other detail reports are available from 'Run Reports' for a specific month.