Stanford University

UIT SHC BI Reporting

Running a Client Billing report (CB005):

Billing Detail reports provide information about services billed in previous months (updated once a month – final data is available after the Stanford University monthly financial close).

1. Go to Oracle BI

2. Your browser version is checked automatically. If it does not pass, please close the open browser and use a <u>recommended browser</u>. You will need to use your SUNet ID and password to login.

3. In the blue toolbar at the top right, click Catalog



4. In the Folders panel, double-click **Shared Folders** to expand it, then choose **ITS Reports.** Select **ITS Clients** and then the report **ITS_(CB005) Stanford Hospital Billing Detail** using the **Open button.**

Catalog				
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∡ Folders	. E1	Type All	▼ Sort Name A-Z ▼ □ Show More Details	
My Folders			ITS_(BI011) Wiring and Construction Billing Last Modified 5/31/2016 7:59:01 AM Owner svemp This report combines the W&C upload with the billing activity. Open More ▼	
Automy Components DMR		•	ITS_(BI027) Bill Code by Expenditure Period with Asset Group Last Modified 9/29/2016 2:37:29 PM Owner System Account Pivot table view of Item codes within Asset group and summarized billing amount by GL PERIOD. Open More ▼	
HR-Payroll-Benefits	s Systen	•	ITS_(CB001) University Billing Detail Last Modified 4/16/2021 9:56:52 PM Owner System Account Displays billing details by Expenditure Period including PTA, Budget Unit, Service Name, ijournal and associated work order details. Open More ▼	
ITS Internal		*	ITS_(CB005) Stanford Hospital Billing Detail Last Modified 7/9/2020 12:35:31 PM Owner System Account Open More ▼	
 Data Model Workgroup 		*	ITS_(CB006) Children's Hospital Billing Detail Last Modified 7/9/2020 12:35:24 PM Owner System Account Open More ▼	
		۲	ITS_(CS002) All Services and Item Details - University Last Modified 12/9/2021 12:52:46 PM Owner System Account Displays all services and item details for University clients (Inventory Report). Open More ▼	
		*	ITS_(CS003) All Services and Item Details - Hospital Last Modified 12/9/2021 12:53:03 PM Owner System Account All Services and Item Details for Stanford Healthcare Open More ▼	
		*	ITS_(CS004) All Services and Item Details - Children's Hospital Last Modified 12/9/2021 12:53:16 PM Owner System Account All Services and Item Details for the Stanford Children's Health Open More ▼	
			ITS_(LG001) Legacy Detail Non-Usage (ITS_BIII_03 Detail Non-Usage Excel) Last Modified 5/31/2016 7:58:54 AM Owner System Account Displays billing detail of non-usage data in Excel format Open More ▼	
			ITS_(LG002) Legacy Detail Usage (ITS_Bill_04 Detail Usage Excel) Last Modified 5/31/2016 7:58:54 AM Owner System Account Displays billing detail of usage data in Excel format Open More ▼	
			ITS_(LG003) Legacy Detail by ORG Non-Usage (ITS_BIII_05 Detail by ORG Non-Usage Excel) Last Modified 5/31/2016 7:58:54 AM Owner System Account Displays billing detail of non-usage data BY ORG in Excel format Open More ▼	
			ITS_(LG004) Legacy Detail by ORG Usage (ITS_Bill_06 Detail by ORG Usage Excel) Last Modified 5/31/2016 7:58:54 AM Owner System Account Displays billing detail of usage data BY ORG in Excel format Open More ▼	

5. Use the filter field arrows to limit your report. **Note: field names are case-sensitive – see examples.** Questions with an asterisk are required fields

 $Services \ Name-remember \ to \ include \ the \ corresponding \ "Adjustment" \ Service \ Name$

Cost Centers require the following prefixes:

HH – for Hospital

UH – UHA

VC – Tri Valley

ITS_(CB005) Stanford Hospital Billing Detail	
 Search prompts are case sensitive (examples represent case sensitive formatting) An asterisk * preceding a search prompt indicates a required field Use a semicolon as separator when entering multiple values in a single search prompt that has Search prompts without a drop-down arrow allow only one value at a time (multiple values cann Export results available only in a PDF or a Data Tab delimited format (Tab delimited format can be) 	a drop down arrow lot be entered) be saved as an Excel spreadsheet)
* Expenditure Period (e.g., FEB-2013) =Select Value	
Cost Center (e.g., HH12345) contains any	
Service Name (e.g., MOBILE DEVICE, VOICE,) =Select Value	
Service Number (e.g., ITS-6507251234) contains any	
Item Code (e.g., AT&T O, CONV FEE,) contains any	
Service Identifier 1 contains anySelect Value	
Service Identifier 2 contains anySelect Value	
Service Identifier 3 contains anySelect Value	
ijJournal Number (number only, e.g., 994756) contains anySelect Value	
	OK Reset ▼
Refresh - Copy	

6. Click **OK**. The report may take a few minutes to display.

7. To export the report, scroll to the bottom of the page and click **Export > Data > Choose Format**. The report downloads to your computer.