Running a Client Inventory report (CS003):

All Services and Item Details reports show data for all services that have been ordered, searchable without specifying a period name (billing month and year).

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 recommended browser. 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_(CS003) All Services and Item Details – Hospital using the Open button.
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
It is important to pick at least one **ITS Work Order Status** (ex. In Service, Complete,...)

- **In Service** (active – billing)
- **Complete** (canceled – will bill up until the cancel date)
- **Released** (new order not In Service waiting to be provisioned)

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.

Note:
**Transaction Quantity** may be a dollar amount where there is upload or custom billing otherwise it is the number of units for a bill code ordered or returned.

**Transaction Type**: show an issue and return of quantity