Stanford University

UIT SHC BI Reporting

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 <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

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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.**

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My Folders My Folders Shared Folders		9	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 ▼			
Components DMR	monny mponents IR :Payroll-Benefits Systen S Reports IT S Clients IT S Internal Data Model rrkgroup	9	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-Ben		٩	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 ▼			
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			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 ▼			
		È	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 ▼			
		Ē	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_(CS003) All Services and Item Details - Hospital

1. All search prompts are case sensitive.

2. Use a semicolon as separator when entering multiple values.

3. Search prompts with no drop-down arrow can take only one value at a time, i.e. no multiple values can be entered.

4. Export results in Tab Delimited or PDF format (excel is not a valid format).



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