

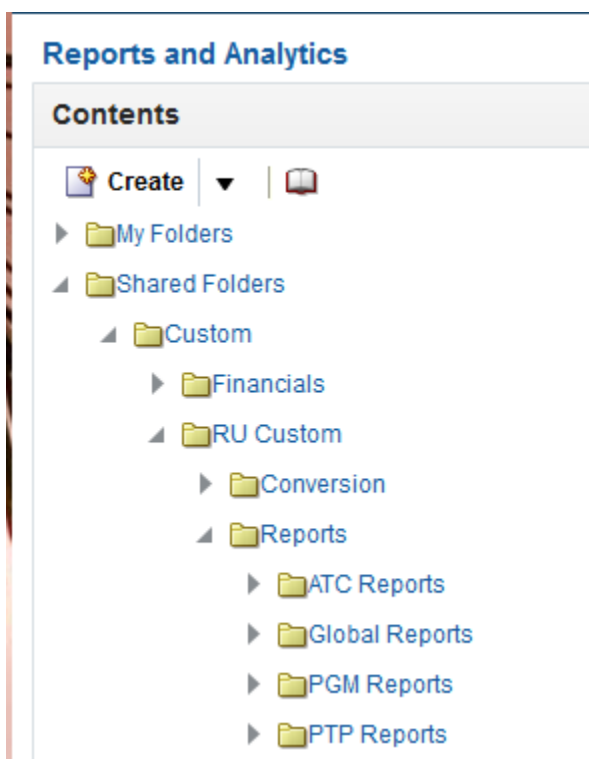


## OVERVIEW

This job aid details how to run the BI reports. Make sure you have completed all your report desktop settings before running the queries.

## RU CUSTOM/REPORTS

1. Log in to my.rutgers.edu and the Financial Management system.
2. Navigate to **Shared Folders>Custom>RU Custom>Reports**.

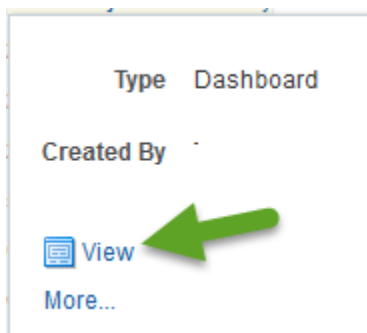


### Note:

- ATC Reports folder=General Ledger Reports
- Global Reports folder=Reports with Global Access
- PGM Reports=Sponsored and Non Sponsored Reports
- PTP Reports=Procurement Reports



3. Select one of the folders. As an example, **PGM Reports**. You can open one of the reports by clicking on the name and select **View**.



4. Enter the report parameters. For example, enter a **Project Number** or use the drop down arrow to search for one.

**PGM Reports**

Business Unit All  Project Organization

Project Number All  Source Reference All

If you search for the parameter ensure you highlight your search results and click **OK**.

**Search** ? ×

Name


Match Case

**Value**

5. After you enter your parameters click the **Apply** button to run the report.



- The report opens in excel You can export the report to excel by selecting the **Export link** on the bottom left of the report.

	A	B	C	D	E	F	G	H	I
1		<b>RU PJ 013 COA Segment Listing for Projects</b>							
2									
3									
4									
5									
6									
7									
8	Business Unit	: All							
9	Project Organization	: Multiple							
10	Project Type	: All							
11	Project Number	: 201140							
12	Source Reference	: All							
13	Project Manager	: All							
14	Principal Investigator	: All							
15									
16	<b>Project Number</b>	<b>Project Name</b>	<b>Project Owning Org</b>	<b>Source Reference</b>	<b>Task Number</b>	<b>Task Name</b>			
17	201140	280758-Biochem Micro Service Revenue Account	33050201528	280758	200	ARESTY FUNDS			