



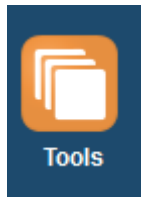
**OVERVIEW**

This job aid details the process for locating project segments using the Oracle Business Intelligence (BI) Publisher and exporting the report to Excel. You can use the report to locate project segments including Project Number, Project Name, Owning Organization (UDO), Task Number, Project Manager, Contract Number, etc.

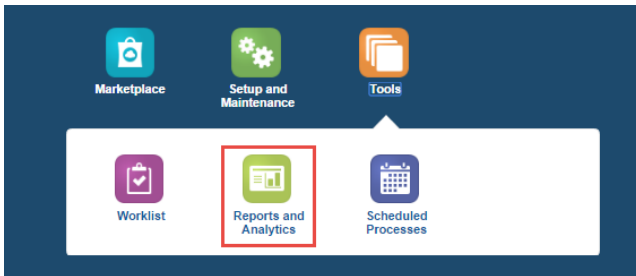
**NAVIGATING TO PGM REPORTS**

Use the following process to navigate to the Global Report folder:

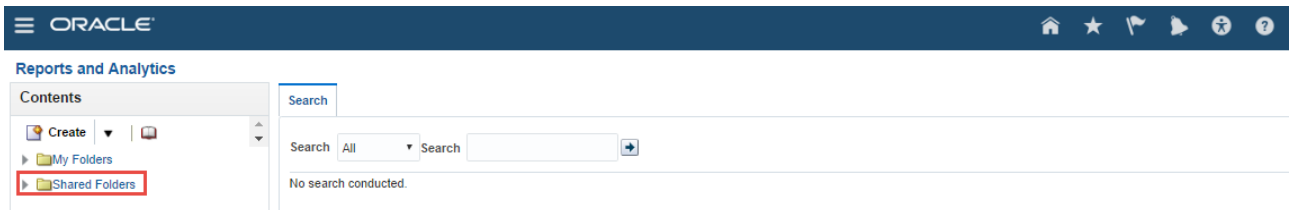
1. Click the **Tools** icon



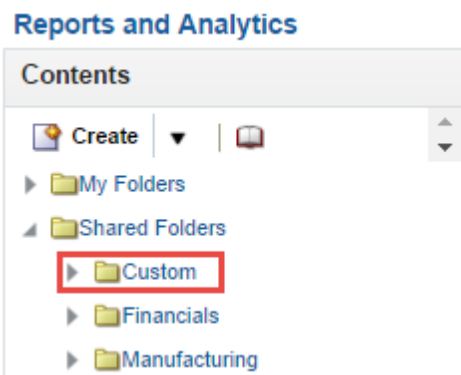
2. Click the **Reports and Analytics** icon



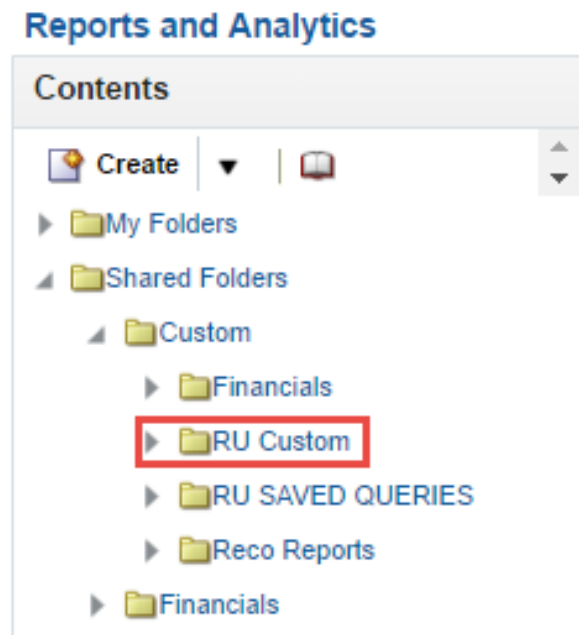
3. In the *Reports and Analytics* menu, click the triangle to expand the **Shared Folders** menu



4. Click the triangle to expand the **Custom** menu

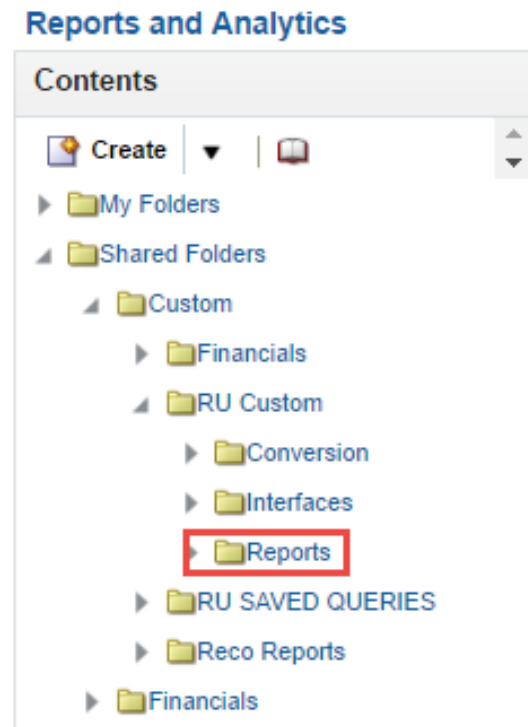


5. Click the triangle to expand the **RU Custom** menu

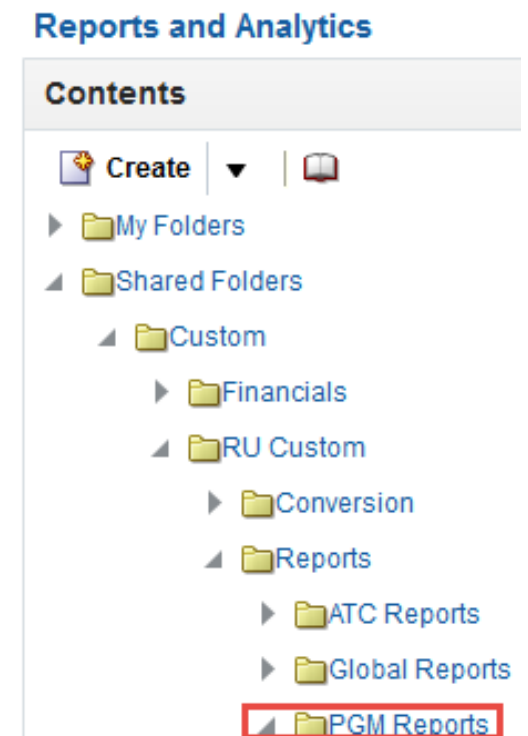




6. Click the triangle to expand the **Reports** menu



7. Click the triangle to expand the **PGM Reports** menu





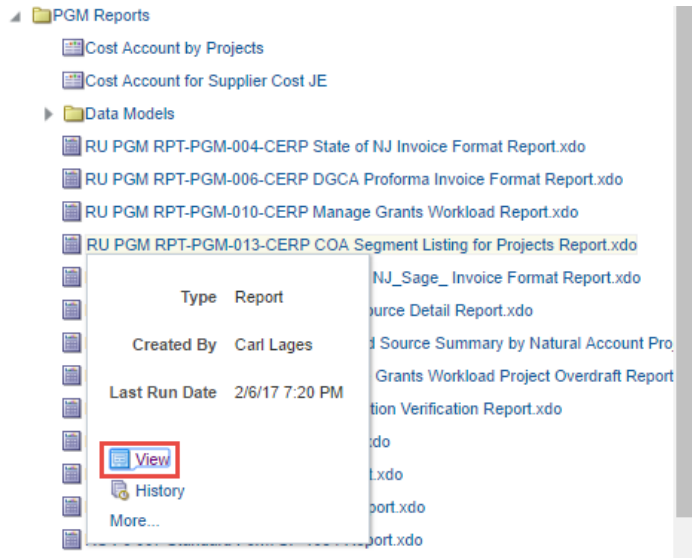
**RUNNING RU PGM RPT-PGM-013-CERP**

Use the Oracle Business Intelligence (BI) Publisher to run a report detailing project segment information.

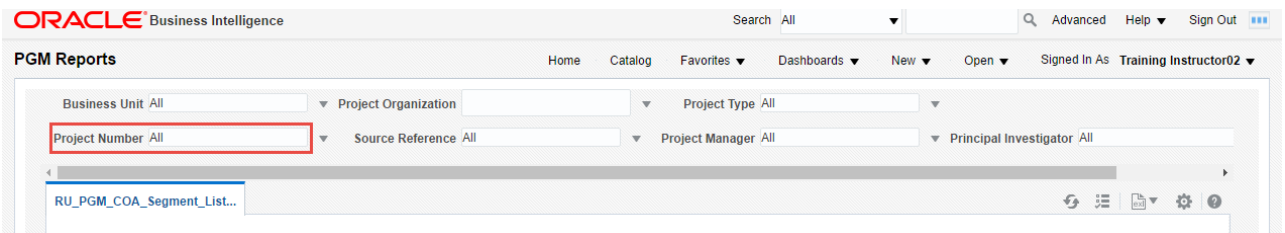
1. Select the hyperlink for **RU PJ 013 COA Segment Listing for Projects Report.xdo** to run the *COA Segment Listing for Projects* report

-  [RU PJ 003 Revenue Recognition Report.xdo](#)
-  [RU PJ 006 Standard Invoice Format Report.xdo](#)
-  [RU PJ 007 Standard Form SF-1034 Report.xdo](#)
-  [RU PJ 009 Sponsored Expenditure Report.xdo](#)
-  [RU PJ 010 Workload To DO List Report.xdo](#)
-  [RU PJ 013 COA Segment Listing for Projects Report.xdo](#)

2. Click **View** in the report pop-up window to open the *Oracle Business Intelligence Publisher*



3. Click in the **Project Number** field and select **Search** from the drop-down menu





4. Type your project number in the **Name** field

Search

Name Starts with ▼ 204041|

Search  Match Case

5. Click **Search**

Search

Name Starts with ▼ 204041|

Search  Match Case

6. Select **your project number** from the list of values

Search

Name Starts with ▼ 204041

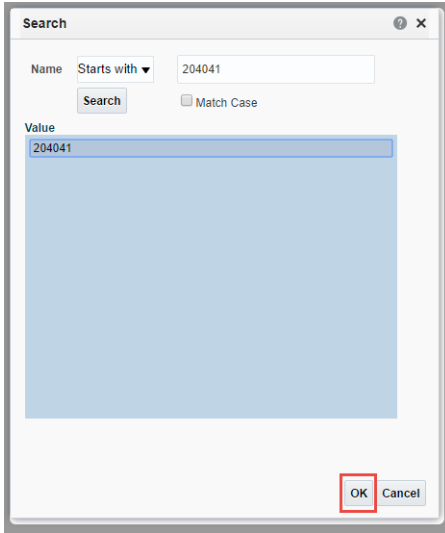
Search  Match Case

Value

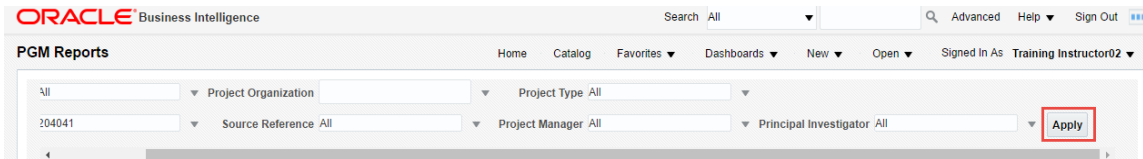
204041



7. Click the **OK** button



8. Click the **Apply** button



**Note:** You will need to use the scroll bar below the search parameters to locate the button.



## REVIEW REPORT RESULTS

You can review the results of your report in BI Publisher and export to Excel.

Columns available include: Project Number, Project Name, Project Owning Org, Source Reference, Task Number, Task Name, Project Manager, Location, Location Code/Description, Fund Type, Fund Type Code/Description, Business Line, Business Line Code/Description, Activity, Activity Code/Description, Contract Number, and Contract Name.

1. Click **OK** in the pop-up window to open the report in an Excel file
2. Review the results

<b>Segment Listing for Projects</b> <span style="float: right;">Date: 2017-02-01 3:59:47 PM Page 1 of 1</span>													
Business Unit	All												
Project Organization	Multiple												
Project Type	All												
Project Number	204041												
Source Reference	All												
Project Manager	All												
Principal Investigator	All												
Project Number	Project Name	Project Owning Org	Source Reference	Task Number	Task Name	Project	Location	Location Code Description	Fund Type	Fund Type Code Description	Business Line	Business Line Code Description	Activity
204041	FE2367-RSDM4 Promotional Items	74057453264	FE2367	200	FE2367-RSDM4 Promotional Items	Vincent Nacco	3380	Rutgers School of Dental Medicine	50	Unrestricted Internally Designated	3400	Other Separately Budgeted Research	0000
204041	FE2367-RSDM4 Promotional Items	74057453264	FE2367	200	FE2367-RSDM4 Promotional Items	Vincent Nacco	3380	Rutgers School of Dental Medicine	50	Unrestricted Internally Designated	3400	Other Separately Budgeted Research	0000