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.

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

5. After you enter your parameters click the **Apply** button to run the report.
6. The report opens in excel. You can export the report to excel by selecting the Export link on the bottom left of the report.

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>Project Organization</th>
<th>Project Type</th>
<th>Project Number</th>
<th>Source Reference</th>
<th>Task Number</th>
<th>Task Name</th>
</tr>
</thead>
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<td>All</td>
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<td>53050201528</td>
<td>200</td>
<td>ARESTY FUNDS</td>
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</tbody>
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