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

![Tools icon](image1)

2. Click the Reports and Analytics icon

![Reports and Analytics](image2)

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

![Custom menu](image1.png)

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

![RU Custom menu](image2.png)
6. Click the triangle to expand the **Reports** menu

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

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

5. Click **Search**

6. Select **your project number** from the list of values
7. Click the **OK** button

![Image of search dialog box with OK and Cancel buttons]

8. Click the **Apply** button

![Image of ORACLE Business Intelligence interface with 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

<table>
<thead>
<tr>
<th>Project Number</th>
<th>Project Owning Org</th>
<th>Project Name</th>
<th>Source Reference</th>
<th>Task Number</th>
<th>Task Name</th>
<th>Project Manager</th>
<th>Location</th>
<th>Location Code/Description</th>
<th>Fund Type</th>
<th>Fund Type Code/Description</th>
<th>Business Line</th>
<th>Business Line Code/Description</th>
<th>Activity</th>
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