

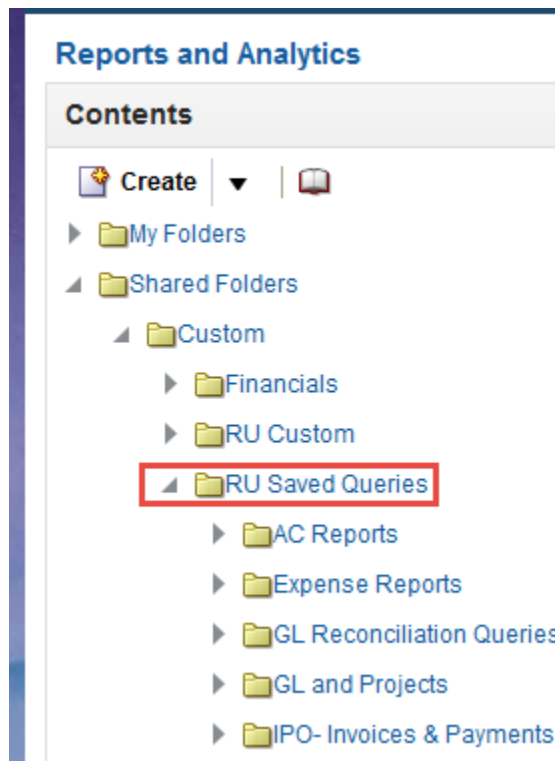


OVERVIEW

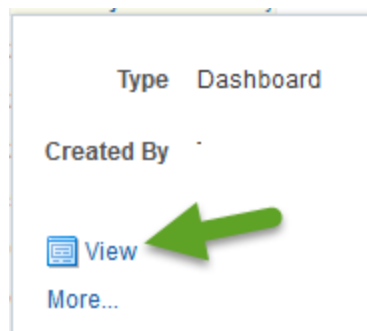
This job aid details how to run the OTBI Saved Queries reports. Make sure you have completed all your report desktop settings before running the queries.

RU SAVED QUERIES

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



3. Select one of the queries. As an example, under the GL and Projects folder, select **RU Saved Query number 202- Project Summary** will provide Revenue, Costs and Net Balance for Projects by month. Click on the **query name** and select **View**.





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

Search 202 - Projects Summary x

Award Name

Project Number

Period Name

Project Organization

5. The query results display. You can export the report to excel by selecting the **Export link** on the bottom left of the report.

Search 202 - Projects Summary x

Project Summary

Award Name	Project Name	Project Number	Project Organization	Invoice Amount	Revenue Amount	Cost	Net Balance	Current Budget Cost	Task Name	Task Number	Accounting Period Name
	280758-Biochem Micro Service Revenue Account	201140	33050201528		1,283.45		1,283.45		ADMINISTRATION	201	APR-17
					0.00		0.00				MAY-17

Return - Export

- PDF
- Excel
- Powerpoint
- Web Archive (.mht)
- Data



6. The Excel **Auto Sum** formula can be added to see the total Revenue, Cost and Net Balance.

	A	B	C	D	E	F	G	H	I	J
1	Non-Sponsored Project Rev and Costs									
2										
3	Project Name	Project Number	Project Organization	Calendar Month Code	Invoice Amount	Task Name	Task Number	Revenue Amount	Cost	Net Balance
4	289010-Snyder Farm Center	202584	33057258069	2016 / 09		289010-Snyder Farm Center	200	541,712.60	266.78	541,445.82
5				2016 / 10		289010-Snyder Farm Center	200	545,199.10	2,958.63	542,240.47
6				2016 / 11		289010-Snyder Farm Center	200	-536,910.20	2,984.21	-539,894.41
7				2016 / 12		289010-Snyder Farm Center	200	0.00	9,588.05	-9,588.05
8				2017 / 01		289010-Snyder Farm Center	200	31,118.17	47,665.63	-16,547.46
9				2017 / 02		289010-Snyder Farm Center	200	523.00	2,938.69	-2,415.69
10								581,642.67	66,401.99	515,240.68
11										