



## OVERVIEW

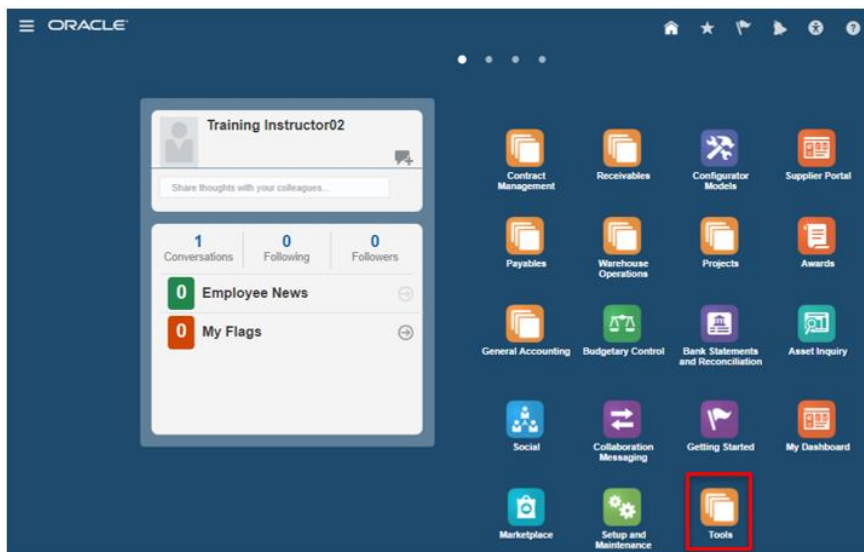
This job aid details the desk top setups that are needed for the RU Saved Inquiries and how to run the RU Saved Inquiries reports.

## UPDATING LEDGER CURRENCY SETTINGS

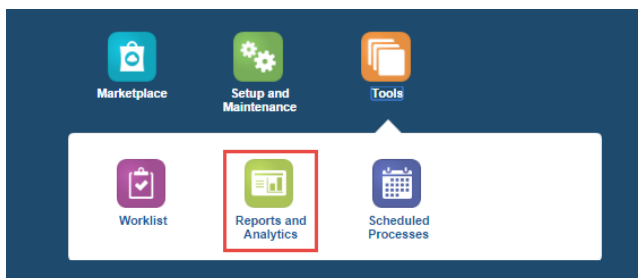
Use the following process to set up your desk top settings for RU Saved Inquiries.

Login to the **Financial Management System** with your NetID and password.

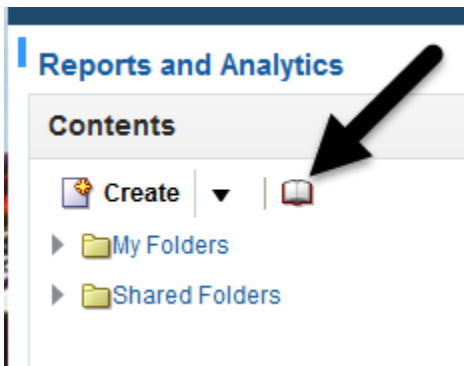
1. Click the **Tools** icon



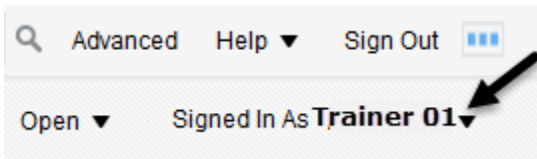
2. Click the **Reports and Analytics** icon



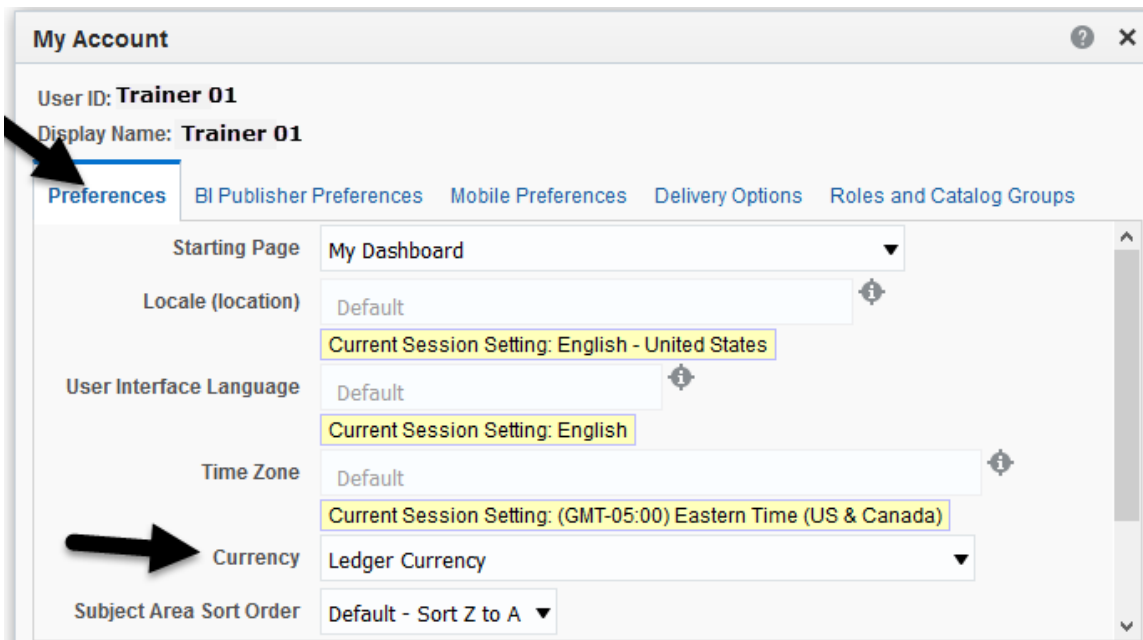
3. In Click the **Catalog** (📖) icon



4. On the right hand side use the drop down arrow next to your name to select **My Account**.



5. On the **Preferences** tab, select **Ledger Currency** using the drop down arrow in the Currency field. Click **OK**.



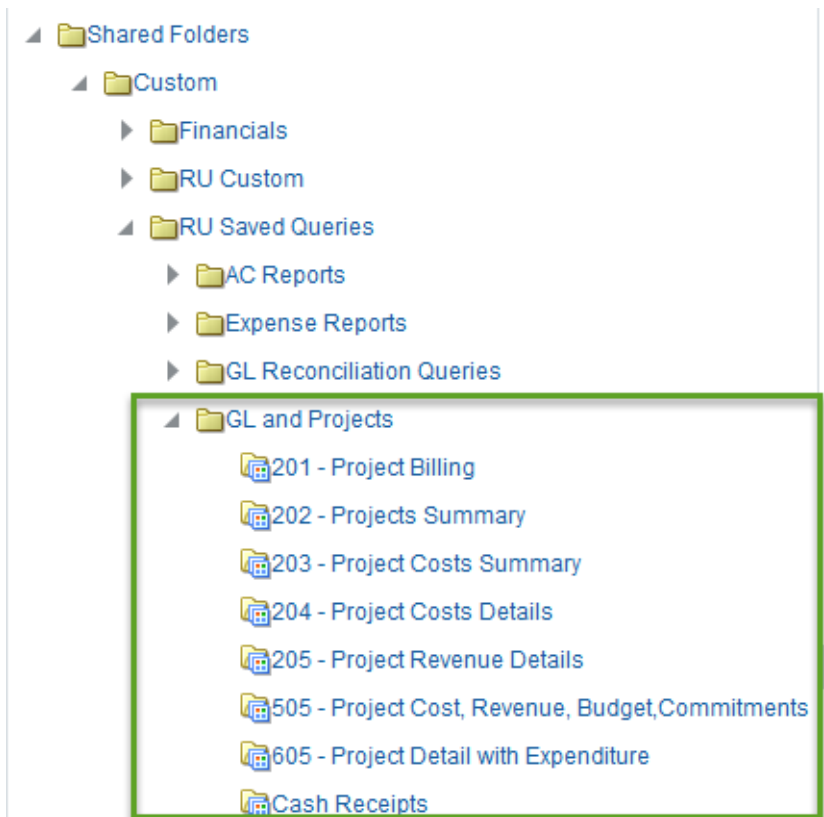
6. Logout of the Financial Management System, close your browser, and log back in.



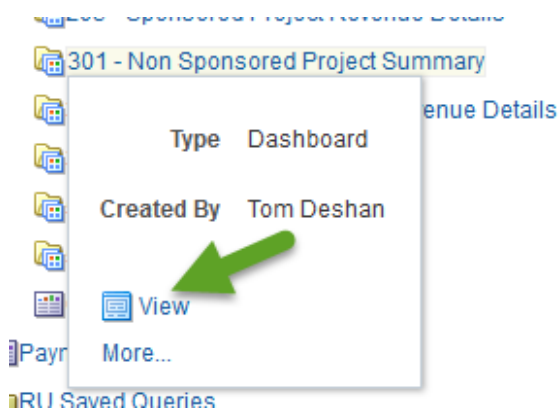
**RU SAVED QUERIES**

How to run RU Saved Inquires.

1. Log in to my.rutgers.edu and the Financial Management system.
2. Navigate to **Shared Folder>Custom>RU Saved Queries>GL and Projects** the relevant query and run it. Dollar amount data will be displayed.



3. **RU Saved Query number 202 Project Summary** will provided on Revenue, Costs and Net Balance for Projects by month. Click on the **query** and select **View**.



4. 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 report displays. 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. Add the **Auto Sum** formula to see the total Revenue, Cost and Net Balance.

Project Name	Project Number	Project Organization	Calendar Month Code	Invoice Amount	Task Name	Task Number	Revenue Amount	Cost	Net Balance
289010-Snyder Farm Center	202584	33057258069	2016 / 09		289010-Snyder Farm Center	200	541,712.60	266.78	541,445.82
			2016 / 10		289010-Snyder Farm Center	200	545,199.10	2,958.63	542,240.47
			2016 / 11		289010-Snyder Farm Center	200	-536,910.20	2,984.21	-539,894.41
			2016 / 12		289010-Snyder Farm Center	200	0.00	9,588.05	-9,588.05
			2017 / 01		289010-Snyder Farm Center	200	31,118.17	47,665.63	-16,547.46
			2017 / 02		289010-Snyder Farm Center	200	523.00	2,938.69	-2,415.69
							<b>581,642.67</b>	<b>66,401.99</b>	<b>515,240.68</b>