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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 select the Financial Management System tile.
- 2. Select the double arrows and Shared Folders.

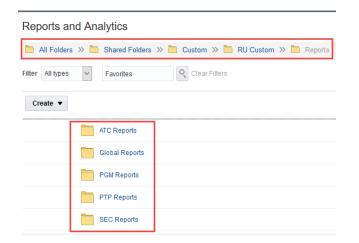
Reports and Analytics					
All Folders	»				
Filter All types	My Folders Shared Folders	Clear Filters			
Create v	-				

3. Select Custom>RU Custom.

Reports and Analytics							
i	All Folders ≫ 🛅 Shared Folders						
Filter	All types	~	Favorites	Q Clear Filters			
Cre	eate 🔻						
			Common Content				
-			Custom				

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4. Select one of the reports from the folders.



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
- SEC Reports=Security

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5. You Also can select Browse Catelog on the right hand side of the screen and navigate to you reports that way.

Browse Catalog					
Catalog					
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Folders					
My Folders					
Shared Folders					
Common Content					
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🕨 🚞 Functional Setup					
Higher Education					
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Procurement					
Projects					
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RU Custom					
Conversion					
Reports					
 ATC Reports Global Report 					
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PCM Paparte					
 PGM Reports PTP Reports 					

6. Select one of the folders. As an example, **PGM Reports.** You can open one of the reports by clicking on the name.

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7. Enter the report parameters. For example, enter a **Project Number** or use the drop down arrow to search for one.

Business Unit All		Project Organization	
Project Number All	•	Source Reference All	•

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

Search	@ ×		
Name	Starts wit	201140	
	Search	Match Case	
Value			
201140			

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

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1	RUTGERS		RU PJ 013	COA Segment	Listina fo	r Proiects
2				5	5	
3						
4						
5						
6						
7						
8	Business Unit : All					
9	Project Organization : Multiple					
0	Project Type : All					
1	Project Number : 201140					
2	Source Reference	: All				
L3	Project Manager	: All				
4	Principal Investigato	or : All				
15						
	Project Number	Project Name	Project Owning Org	Source Reference	Task Number	Task Name
16						
	201140	280758-Biochem	33050201528	280758	200	ARESTY
		Micro Service				FUNDS
17		Revenue Account				