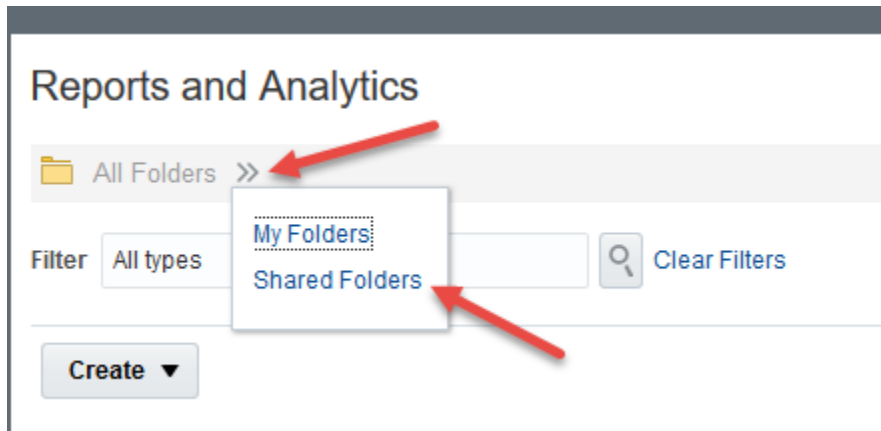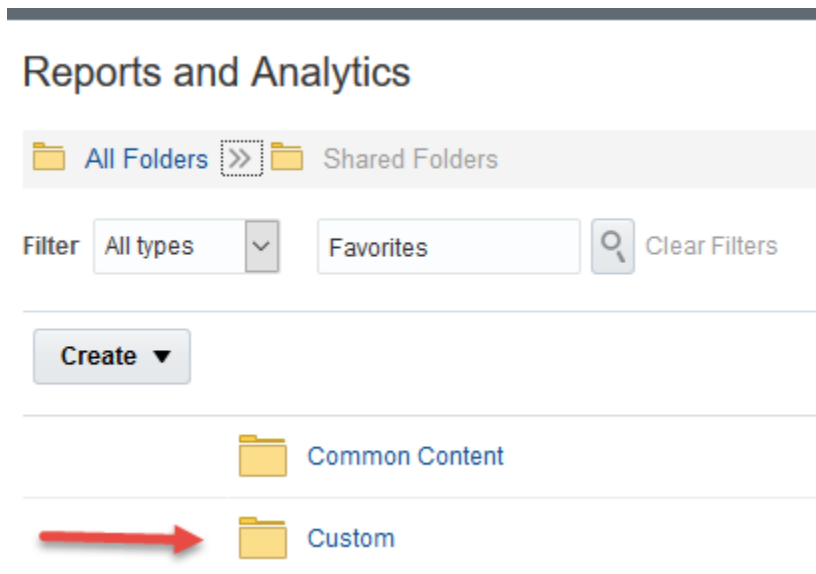# RUTGERS

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.
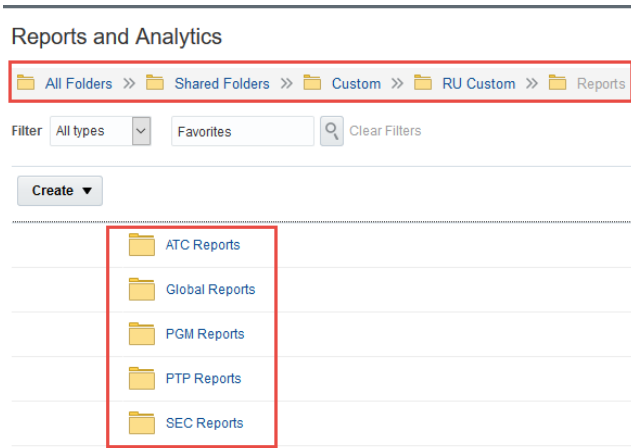
RU CUSTOM/REPORTS

1. Log in to my.rutgers.edu and select the Financial Management System tile.

2. Select the double arrows and **Shared Folders**.


3. Select **Custom>RU Custom**.

RUTGERS

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

5. You Also can select Browse Catelog on the right hand side of the screen and navigate to you reports that way.
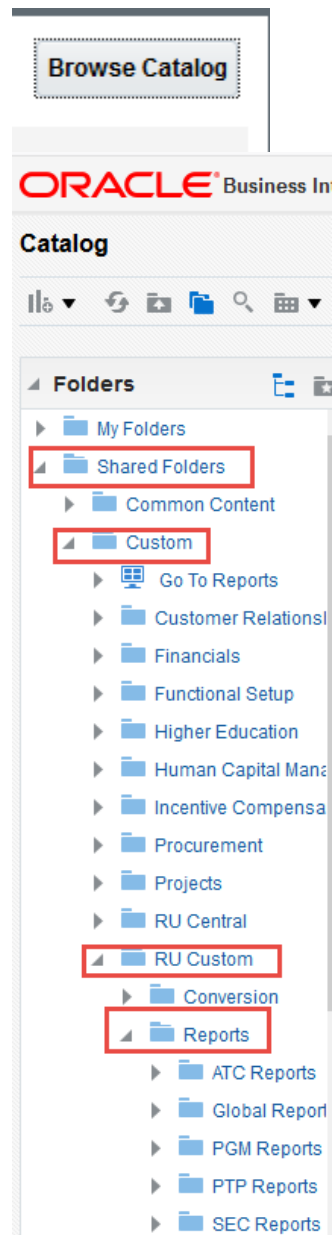
6. Select one of the folders. As an example**, PGM Reports.** You can open one of the reports by clicking on the name.

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

PGM Reports

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

RU_PJ_013_COA_Segment_L...

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

Search ? ✕

Name	Starts with ▼	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.

	A	B	C	D	E	F	G	H	I
1	RUTGERS				RU PJ 013 COA Segment Listing for Projects				
2									
3									
4									
5									
6									
7									
8	Business Unit	: All							
9	Project Organization	: Multiple							
10	Project Type	: All							
11	Project Number	: 201140							
12	Source Reference	: All							
13	Project Manager	: All							
14	Principal Investigator	: All							
15									
16	Project Number	Project Name		Project Owning Org	Source Reference	Task Number		Task Name	
17	201140	280758-Biochem Micro Service Revenue Account		33050201528	280758	200		ARESTY FUNDS	