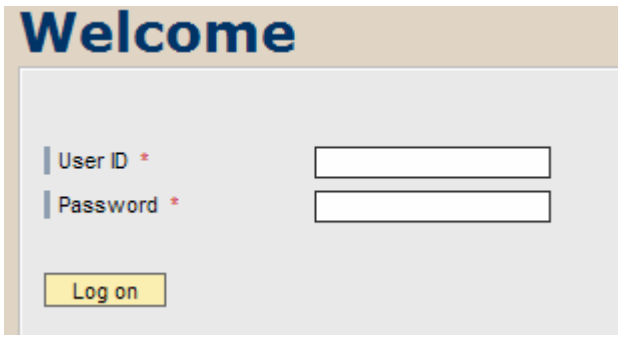

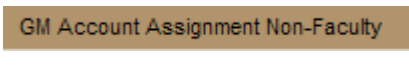

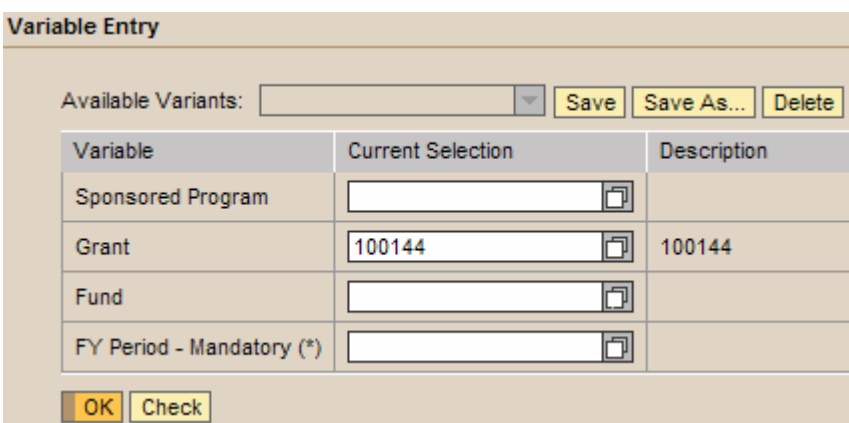
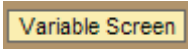




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Beginning Steps	
Enter the OnePurdue Portal	https://erp-portal-prd.itap.purdue.edu/irj/portal
Log into the Portal	<p>Enter your Career Account Login and Password and press Enter or click Log on button.</p> 
Portal Navigation	
Once in the OnePurdue portal, to get into the GM AIMS Non-Faculty Application, click the following buttons:	
Click 	Takes you to the AIMS page within the portal
Click 	Takes you to the first variable screen within the GM AIMS Non-Faculty application
Variable Screens - Basic Navigation	
Variable screens allow users to enter values that limit the results that will be returned in the queries.	
<p>Once a variable screen is complete, the chosen values will appear in the description fields to the right of the selection boxes.</p> <p>Mandatory fields on variable screens are indicated by a (*) next to the variable field, as shown on the FY Period field on the screen to the right.</p> <p>Once all desired values have been entered into the variable screen, user can click  to execute query.</p>	<p>All variable screens in AIMS look similar to the one shown below.</p> 
<p>At any point if you wish to return to the variable screen for a report, click the Variable Screen button.</p>	



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Variable Screens - Selecting Variable Values

If the user needs to search for the desired value(s) in the variable screen, the following steps should be followed.

Click the button next to the input box to open a selection dialog.



Once the selection dialog is open, can choose single values or value ranges, depending on the variable.

Show tool:

Show view:

All

Can also search for a value using search functionality. To change to search mode, on the Show View dropdown box, choose Search.

Show tool:

Show view:

All

Most variables will allow you to search by either text or key using the dropdown next to the variable name.

In most cases, text allows you to search for a name or description, while key allows you to search for a number value. For example, a Key would be "41010000" while the text value would be "N.S.F."

Search

Fund:

Maximum

Once key or text have been selected, enter as much information as possible.

To aid in searching, enter * at the beginning and/or end of the value that you wish to search for. This increases your chances of getting the appropriate value(s) returned.

To ensure that all possible values are searched, it is imperative that the maximum box is increased beyond the default of 1000.

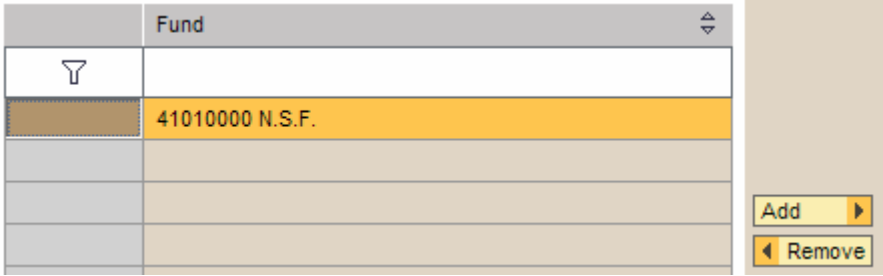
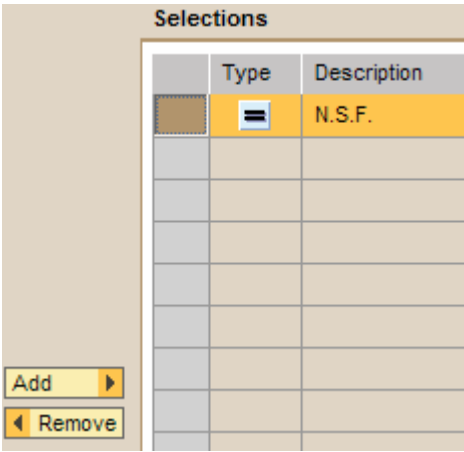



When desired value is entered

Fund:

Maximum



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<p>and maximum increased, click Search to return values meeting the criteria.</p>	
<p>Once returned values are shown, click the gray box to the left of the desired value to highlight the choice, then click the Add button to add the value to your selections box.</p> <p>Repeat this process until all desired values are selected.</p>	
<p>To remove a value from the selection box, click the gray box to the left of the desired value in the Selections box to highlight the choice, then click the Remove button to remove the value from your Selections box.</p>	
<p>Once all desired values are selected, click OK to return to the variable screen.</p>	
<p>Searching For PI or CoPI Names</p>	
<p>To search for PI or CoPI Names, follow the steps below.</p>	
<p>Open the search box on the Account Assignment Variable Screen next to the PI Name or CoPI Name field.</p>	<p>Click  to the right of the PI Name or CoPI Name field.</p>
<p>Increase Maximum number from 1000 to 999999999. This will enable you to search the entire list of names, rather than just the first 1000 entries.</p>	<p>Maximum <input type="text" value="999999999"/></p>
<p>In the box to the right of the funnel, enter the last name of the staff/faculty member that you are searching for. Enter an * after the last name for a higher probability of returning the</p>	<p> <input type="text" value="JONES*"/></p>



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correct values.

Note: This particular field is case sensitive, so be sure to enter the proper case to increase your chance of returning the correct results. The proper case is all caps. For example, JONES* is a valid entry.

After you have entered the desired search value, click the



to begin search.

Once returned values are shown, click the gray box to the left of the desired value to highlight the choice, then click the **Add** button to add the value to your selections box.

	JONES*
<input type="checkbox"/>	JONES, DON
<input checked="" type="checkbox"/>	JONES, JAMES

Repeat this process until all desired values are selected.

Once all desired values are selected, click **OK** to return to the variable screen.



Variable Screens - Creating Variants

To save variable values as a variant for future use, follow the steps below.

Once all desired values are entered into the variable screen, click **Save As...** to save variable values as variant.

Enter a description for your variant.

Do not enter a technical name unless you are a BW Super User.

The variants that you create are available for your use only.

If you wish to create a global variant, please contact your

Save Variant

Save Variant

Description:

Technical Name:

OK **Cancel**



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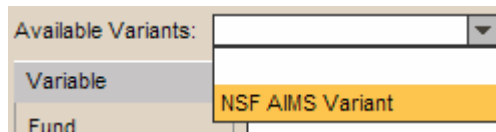
area's BW Super User.

Once all Description is entered, click **OK** to return to the variable screen.

To use your variant, click the dropdown next to Available Variants on the Variable Screen to view the available choices.

Select the variant that you would like to use. This will automatically populate the variable values that are stored in that variant.

Click **OK** to process the query with the values from the variant.



Query Jumps

In the BEx tools, to “drill through” from query to query, you will execute what is called a jump. To get to the jumps, follow the steps below.

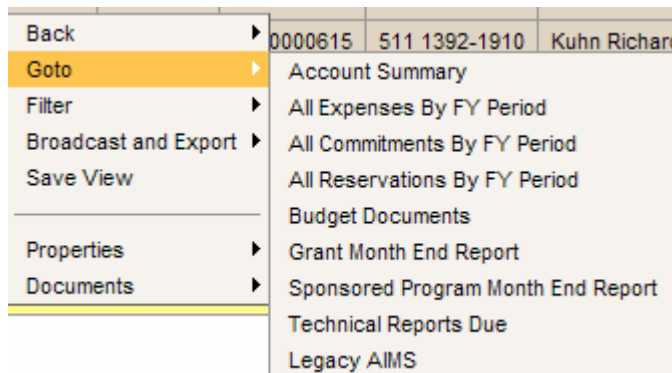
To move from one query to another in AIMS, make sure your cursor is a hand and not an arrow on the data that you wish to jump from, then right click on your mouse and you will get a drop down menu.



Once you get the drop down menu, you can select the report that you would like to jump to.

Click the report that you would like to see. A new window will open up with the selected report.

Note: For some jumps, you will be prompted with a new variable screen, however, on many jumps, there are variables automatically passed behind the scenes. It is important to be on the proper column within the report that you are jumping from in order to get the desired





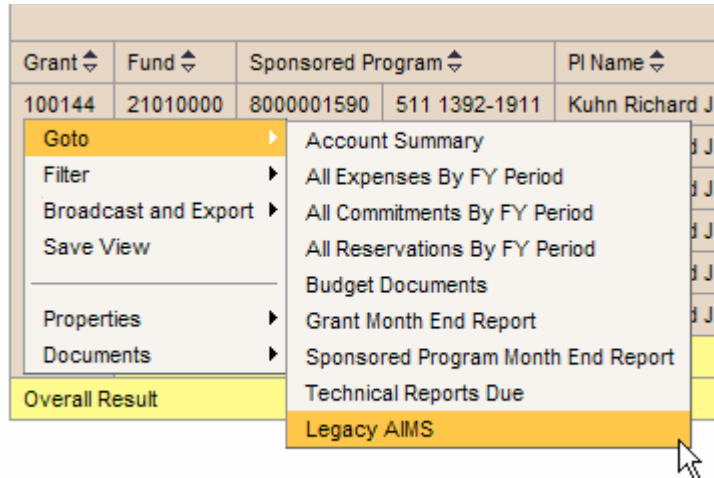
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results on the query that you are jumping to.

The link to Legacy AIMS will take you to the expense transaction details that posted prior to 2/1/07, as well as the Payroll and Travel transaction details that post from 2/1/07 through the HR release of OnePurdue. The navigation within this report is point-and-click, similar to the old AIMS application.

Once you drill down within Legacy AIMS, to get back a page, use your backspace button.

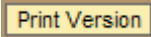
To get back to OnePurdue AIMS from Legacy AIMS, close the window.



Printing a Report

To print a report from AIMS, follow the steps below.

Click the Print Version button.

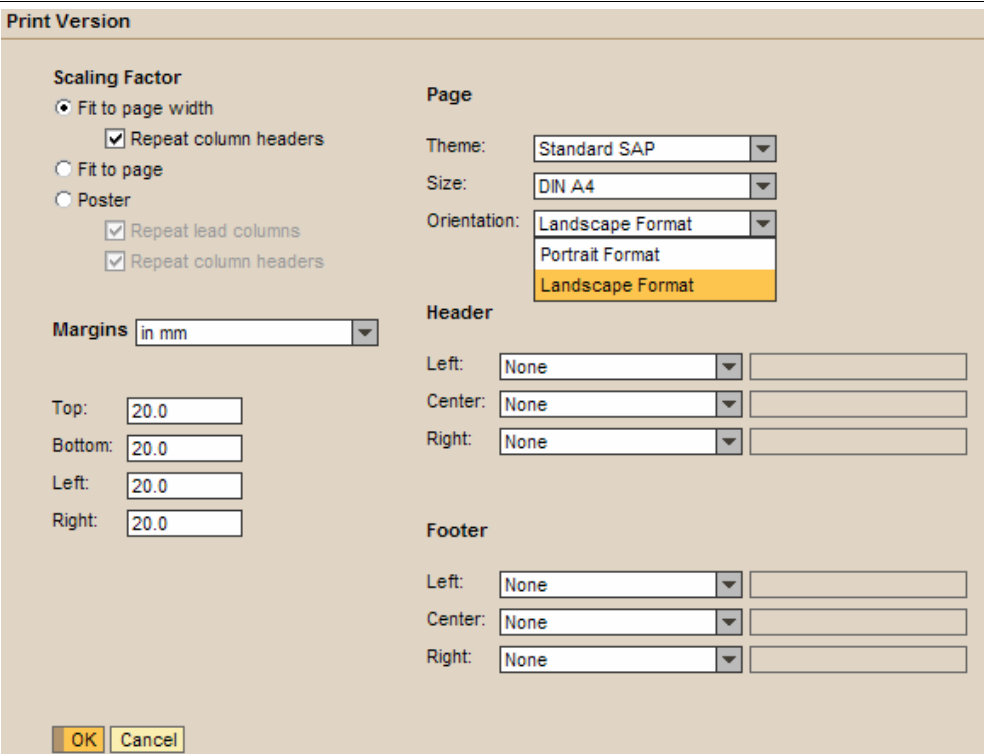


In the Print Version dialog box, change the Orientation to Landscape Format.

You can also add Headers and Footers to the report here.

Margins can also be adjusted from this dialog box.

Once all selections are complete, click **OK**. This will generate a PDF file that you can print and/or save.



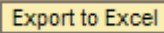


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Exporting a Report to Excel

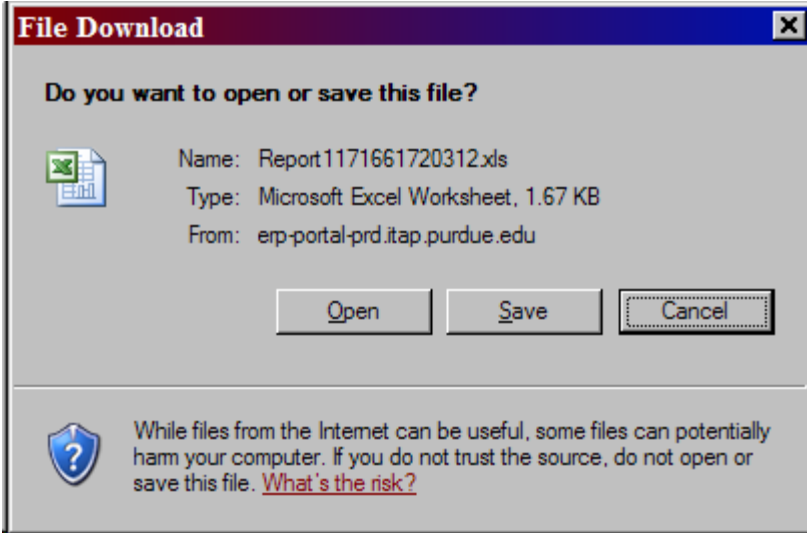
To export a report to an Excel file, follow the steps below.

Click the Export to Excel button.



A dialog box will open allowing you to Open or Save the Excel file.

Note: If the results are too large for Excel, you will receive an "Out of Memory Error".





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Broadcasting a Report

The BEx tools allow for Broadcasting functionality. Broadcasting allows a user to send, or broadcast, a report or a link to a report to one or many other users.

To broadcast a report, follow the steps below.

Click the Send button.

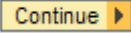


The Broadcasting Wizard box will open.

You can choose the output format here.

Note: Please remember the University's data policies when using the broadcast functionality.

The default and preferred format is an Online Link to Current Data. This will email a link to the user, who must log into the portal to view the data. All other formats do not require the recipient to log in to view the data.

Once the desired Output Format is selected, click  to go to the next screen in the Broadcasting Wizard.

Broadcasting Wizard

Step 1 From 2: Determine Basic Settings

Here you choose how you want to distribute the document and in what format it is to be created. To exit the wizard and call the broadcaster, click [here](#)

Output Format:

- MHTML
- XML (MS Excel)
- HTML
- Online Link to Current Data**
- PDF

Buttons:



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The second page in the Broadcasting Wizard allows you to enter the email address(es) of the person or groups that will receive the link or the data. You can enter any valid email address in the E-Mail Addresses line.

You should enter a subject to the message on the Subject line.

Select the Importance of the email in the Importance box. The default is Medium.

You can also add any additional information that the recipient should know in the Contents box.

Once all desired information is entered, click **Execute** to send the message.

You can also Cancel the message by clicking **Cancel** or go back to the previous screen in the Wizard by clicking **Back**.

Broadcasting Wizard

Step 2 From 2: Enter E-Mail Message

Specify the e-mail addresses of the recipients and maintain texts for the subject line and body of the e-mail. You can then execute the broadcast setting here or continue with the wizard in order to schedule the setting. To exit the wizard and call the broadcaster, click [here](#)

E-Mail Addresses:

Subject:

Importance: **Medium**

Contents:

Cancel **Back** **Continue** **Execute**

Additional Navigation

Sorting	To sort within a report, click the next to the column that you wish to sort. Clicking multiple times will change the sort between ascending and descending.
Removing a Column from Display	To remove a column from the display, click on the column header of the column you wish to remove and drag it until you see . Once the X appears, release your mouse button. The query will refresh itself and the column will no longer appear during that session. To get the column back into the display, exit and re-enter the GM AIMS Non-Faculty application.
Rearranging Columns	To rearrange columns within a report, click on the column header that you wish to move and drag it to the left or right of the column header of where you wish to move the column. Once you see the in the position where you would like to move the column, release your mouse.