The following procedures should be followed to create a report of monthly expenditures. A copy of the report, with attached receipts, is sent to the business office at the end of each month.

1. Log onto the SDG2** site, https://smartdata.jpmorgan.com/sdportal/home.view using your assigned User ID and password. (If you don’t remember your User ID or password, contact Bob Watson, via email or at x8488.)

2. Hover your cursor over the ‘REPORTS’ tab near the top of the screen.

3. Select ‘SCHEDULE REPORT’, the third item on the sub-menu.


5. On the ‘Entity’ page, be sure the ‘Account’ tab is selected (shows a white background)*

6. Enter your Last Name in the ‘Account Name’ field and select ‘SEARCH’

7. Your ‘found’ results will appear at the bottom of the screen. Select the correct account by clicking on your name in blue.

8. On the ‘Select Cost Allocation Scheme’ page, Rose-Hulman should already be selected, if not, select it and click on ‘NEXT’

9. Since no filters are needed, select ‘NEXT’ on the Filters page.

10. Leave the options page unchanged, except you must check ‘Include Splits’ if you want them to display in your report. Be sure your email address is correct, and hit ‘NEXT’

11. On the Frequency page, select the last option, ‘Reporting Cycle’ and use the drop down menu to select the report desired. Select ‘SAVE’.

12. Your job has now been submitted and within five minutes you will receive an email to your RHIT email address telling you your report is ready. Once the email arrives,

13. Your report is under the heading, REPORTS & DATA FILES in the top center of the page.

14. Left click on the report

15. When the yellow bar appears at the bottom of your screen, select ‘OPEN’ and your report should display. It may now be reviewed and/or printed.

*Those with access to multiple accounts may opt to select the ‘Account Group’ Tab and then use the search feature in steps 6 and 7 above. If you do this and your name displays as an account manager, when you follow the remaining steps you will print ALL reports you have access to within a single print job.

** Smart Data On Line Generation 2 is the proprietary software provided by JP Morgan Chase

Published: 11-6-13