This guide contains information for the end user on how to use the RDS Web version of the University of Miami’s Report Distribution System (RDS). While this guide is not comprehensive, it attempts to address those issues with which most end users will be faced when manipulating reports in this environment.

If you have questions about material covered in this guide, contact the RDS Staff at rds.it@miami.edu.
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Introduction

Report Distribution System (RDS) is an application that distributes reports from the University’s mainframe computer to users through their web browser. RDS will contain most of the reports currently produced by Information Technology. Reports will be on-line for different lengths of time based on University Policy and departmental needs. Information on RDS is considered confidential. The reports stored through RDS are managed by the Data Custodian for the various Application areas. Issues related to the report themselves should be directed to the appropriate Data Custodian.

There are two methods of access to RDS.

(1) The first is the RDS Web, which is accessed using Internet Explorer version 7.0 or higher. There is no charge for access, software license or maintenance. No installation is needed for this application. This type of access will allow viewing and printing of reports.

(2) The second is the EOS Thin Client, which is accessed using Internet Explorer version 7.0 or higher. There is a one-time fee of $200 per user, covering the cost of the software license, and an annual fee of $50 for maintenance. No installation is needed for this application. In addition to viewing and printing of reports, this type of access will allow emailing, downloading and transformation of reports.

Sign-Up for RDS

Requesting access to RDS Web requires that you complete one of two access forms. The first, RDS FRS Access Form will provide access to financial reports. The second, RDS General Access Form will provide access to non-financial reports. These forms may be obtained by clicking on the Forms and Guides page.

On the RDS FRS Access Form, complete all required fields. Select the reports you are requesting and enter the department, sub-department or account number on the form. If you are replacing someone and require access to their historical reports, enter the person’s full name and user ID. Mail the completed form to the Controller’s Office, UM Gables One Tower, Suite 150, LOC 2912. You can also fax the form to (305) 284-4850.

On the RDS General Access Form, complete all required fields. Add a page with a list of reports you are requesting. Include the form number and report description. For a complete list of RDS reports, click on Reports on RDS page. Mail the completed form to Information LifeCycle Services, Ungar 138, LOC 2915. You can also fax the form to (305) 284-2840.
Getting Started

Accessing the RDS Web Site
You should have received your Welcome to Report Distribution System (RDS) confirmation email with your user ID and instructions on how to create your new password. To access the RDS Web Site, launch your web browser and enter http://www.miami.edu/rds. This will open the RDS Home page.
Change your password

1. On the RDS Home page, scroll down to the Get Help section.

2. Click on Change Password. This will take you to the RDS Password Change Form.

3. Enter your User ID
4. Press the <TAB> key to move to the **Old Password** field. Enter the old password. If this is your first time logging in, the default password is the last 4 digits of your SSN followed by the first two letters of your last name. Otherwise, use your previously created password.

5. Press the <TAB> key to move to the **New Password** field. **NOTE: The new password must be at least four characters but not more than eight characters in length.**

6. Press the <TAB> key to move to the **Verify Password** field. Re-enter the password you created in step 5.

7. Click on the Change button to submit the changes.

8. Once the password was successfully changed, you will get a confirmation page as shown below.

![Confirmation Page](image)

9. To Login to RDS, Click on the **LOGIN** button on the confirmation page.

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**Reset your Password**

Contact IT Support Center at (305) 284-6565, option 5 to reset your password.
Login to RDS
Once you have created a password, you can login to Report Distribution System.

1. On the RDS Home page, click on RDS LOGIN.
2. This will open the Connection login window.
3. Enter your User ID.
4. Press <TAB> key to go the Password field. Enter your new password and click OK.
5. RDS will now load your report list.
Invalid Login Credentials Supplied

1. If you enter an incorrect User ID and Password more than three (3) times, the system will display the Error 401 message as shown below.

2. If you enter a valid User ID and Password but were not granted access to the RDS, the system will display the Error 1002 message as shown below.
Using RDS

Accessing the Report List
The report list will display the reports you have access to, with the last report showing on the bottom of the list. Report access is granted according to the information you supplied on your RDS Access form. Your RDS screen will resemble the following (report names will differ based on your individual access).

Each report is listed with an icon and six columns of information.

1. The first column gives you the **REPORT NAME**. This is the name assigned to the report when the form was created.

2. The second column is the **FORM NUMBER** – The form number consists of four characters. The first two characters represent the type of report. In this example, “TC” represents Telecom. The second two characters are a simple number designation, so as to differentiate between the various “TC” types of reports. The form number was assigned before reports are loaded into RDS.

3. The Third Column provides the report status:
   - 📚 **Restore archived report** – indicate archive reports that must be restored before viewing and printing.
   - ⭐️ **Active report** - indicates active reports that are available for viewing and printing.
   - 🗑️ **Print report** - allows you to print a report.
4. The Fourth Column **REPORT DESCRIPTION** provides a brief description of the report. This information was entered when the form was created.
5. The fifth column (**# PAGES-DATE**) provides the number of pages for the report.
6. The sixth column provides the date the report was generated. Since reports are generated multiple times daily, the column indicates the date and time generated.

**Navigating in the Report List**

Navigating through the report list is done by making a selection from the menu in the upper right hand of the screen.

- **FILTER**: Click to display the RDS Report Filter
- **PREVIOUS**: Click to view the last seen page of reports.
- **REVERSE**: Click to reverse the order of reports in your list.
- **LOGOUT**: Click to Logout from the RDS secure site.
Using the Report Filter

The filter option allows you to filter your Report List according to your specifications. You may use any of the available fields:

1. **RDS Form ID**: The four-character name found in the ‘Form’ column of the report list.
2. **Report Name**: The JCL name of the report as it appears in the ‘Report Name’ column of the report list.
3. Select a date in the **From Date** and the **To Date** boxes.
4. **Report Status**: Select the appropriate indicator.
   a. **Online**: all active reports that matches your filter criteria
   b. **Archived**: only reports in archived status that matches your filter criteria.
   c. **Restored**: only reports restored from archived that match your filter criteria.

For simplicity, when creating a filter enter the Form ID (e.g., TCA2) and keep the other fields default.

Once you have defined your filter criteria, click on the **Filter** button. To change your filter criteria, click on the **Clear** button to reset the fields. You may return to your Report List by clicking on the **Return to List** button.
Restoring Archived Reports
If a report has been archived, it cannot be viewed without being restored. The report name will be displayed in black and a red arrow will appear next to the form number.

To restore an archived report:

1. Click on the red arrow for the archived report you wish to restore.
2. You should get a RDS Window with message “Your request has been submitted”. Click OK to return to your report list.

The restore cycle runs **every hour on the half hour**. After you submitted your restore request, check RDS within two hours for your restored report.
**Viewing Reports**

To view a report, move the mouse pointer to the report you wish to view and click the left mouse button.

When the report opens, only the first page of the report will be visible. To view the entire report, enter 1 in the **STARTING PAGE** field and 9999 in the **# PAGES** field and click on Submit.

**Searching Reports**

Use the Search option on the menu bar to search for a specific word, part of a word or phrase within the particular report you are viewing.

Use the **BACK TO LIST** option on the menu bar to return to your Report List. You can also use your browser navigation back arrow to return to your Report List.
Printing Reports

It is not recommended that you print your reports directly from the web browser. The coding used to publish information on the internet does not recognize the pre-established page breaks within the RDS reports. As a result, the formatting of the printed reports may not match what is being displayed on the screen.

Local Printing

RDS has a feature that will allow users to print directly to a network printer. It requires that you have access to a network printer with a static IP address, no copy codes assigned and postscript language installed. To setup Local Printing, complete the RDS Local Printer Worksheet, which is located on the Forms and Guides page. Email the completed worksheet to the RDS Staff at rds.it@miami.edu or fax to (305) 284-2840.

Once the Local Printing setup is complete, you can print your reports from RDS.

1. Click on the printer icon next to your report.
2. The RDS EOS window will appear.
3. The local printer name is already set. DO NOT CHANGE.
4. Choose your desired page range (e.g. 1-4 or 8) or no range.
5. Click on Submit button.
6. You should get a confirmation window with the message “Your request has been submitted”. Click OK to return to your report list.
Printing using Notepad
You can also copy, paste and print your reports using Notepad. Although there are a few more steps to this procedure, it provides clear output.

1. Open the report containing the data you wish to print. To load the entire report, enter 1 in the STARTING PAGE field and 9999 in the # PAGES field and click Submit.
2. Hold down the <CTRL> and <A> keys to highlight the report information.

3. Hold down the <CTRL> and <C> keys to copy the report information.
4. Open Notepad. You should have a blank page on your screen.
5. Hold down the <CTRL> and <V> keys to paste the report information.
6. From the menu, choose Format then select Font. Change the font to Courier New, font style to Regular, and Size to 8 or 9 and click OK.
7. To print your document, hold down the <CTRL> and <P> keys. The will display the print dialog.
8. Click on Preferences.
9. For orientation, select Landscape and click OK.
10. Click on the Print icon.
11. To save your document, hold down the <CTRL> and <S> keys. This will display the save dialog.
12. Choose the location to save your file, enter a name and click on Save.

Transferring Report Data to Excel
If you need to perform calculations or reorganize the report data, you must transfer the data into an Excel worksheet. To transfer your data:

1. Open the report containing the data you wish to transfer. To load the entire report, enter 1 in the STARTING PAGE field and 9999 in the # PAGES field and click Submit.
2. Hold down the <CTRL> and <A> keys to highlight the report information.
3. Hold down the <CTRL> and <C> keys to copy the report information.
4. Open Notepad. You should have a blank page on the screen.
5. Hold down the <CTRL> and <V> keys to paste the report information.
6. To save your document, hold down the <CTRL> and <S> keys. This will display the save dialog.
7. Choose the location to save your file, enter a name and click on Save.
8. Open Excel. You should have a blank worksheet on the screen.
9. From the Office Button, choose Open. From the Files of type list, choose Text Files and locate the saved file. Click Open.
10. Follow the instructions on the Text Import Wizard. For Step 1, choose the file type that best describes your data. For Step 2, set your column breaks. Add or remove break lines in the data preview window.
11. Click Finish button on the import wizard. Your report data will be placed in an Excel worksheet.
12. To resize the worksheet click on the gray box directly above the row number 1 and directly to the left of column letter A. The entire worksheet will be highlighted.
13. Click on the Home tab. In the Cells group, click on Format. Scroll down the list and choose AutoFit Column Width. Your worksheet will be resized to fit the data in the cells.
14. From the Office Button, Choose Save As and select Excel Worksheet.
15. Choose the location to save your file, enter a name and click Save.
RDS Essentials

Security
The Report Distribution System resides on a secure web server within the University of Miami. For this reason, certain security requirements must be met in order to gain access to reports within the web based environment.

To gain access to reports on RDS, you must:

1. Possess a RACF security profile. This is a two-part profile that consists of a User ID and Password.
2. Possess a RDS profile. This will be created when you request access to RDS.
3. Have access to a web browser.

If you do not currently have a RACF security profile, items 1 & 2 can be completed simultaneously. If you currently have a RACF security profile, complete item 2 for access to RDS.

Web Browsers
The University of Miami currently supports the use of Internet Explorer. Using other browsers such as Mozilla Firefox or Google Chrome to access RDS will not produce the same results as Internet Explorer. We recommend using Internet Explorer 7.0 or higher.

Passwords
The security system used for Report Distribution will require a password change every ninety days. The system will also remember your previously used passwords. You will be unable to repeat the same passwords.