# Report Distribution Tool (RDT) Upgrade

The Report Distribution Tool (RDT) is going through a technical upgrade which will result in four new features.

This job aid is intended to highlight **only** the new features that will be available once the Report Distribution Tool (RDT) upgrade takes place. The new features that are being covered in this job aid include:

### The Refresh Button

- The ability to refresh the RDT is now available.
- By clicking the refresh button users will have the ability to view reports that are being archived, without first having to log out and back in.

### Enterprise Folders

- Users will be able to filter the reports they want to view.
- Users will be able to create their own folders similar to Windows Explorer to store your reports.

### Emailing of Reports

- Users will now have the ability to email any of the reports they have access to in the tool.

### Selecting Multiple Reports

- Users can now select multiple reports for printing or downloading.

An explanation of new and existing buttons and navigation tools is also included at the end of this job aid.

***NOTE: Once the upgrade takes place, users will need to update any favorites to the Report Distribution Tool as the path will change.***

## The Refresh Button

The Refresh button allows users to refresh the RDT automatically from within the application.

Refreshing the RDT lets users access the RDT database for any reports that have been run and archived during their active session. Users ***are no longer required to log out and back in*** to the RDT in order to refresh their view.

## Enterprise Folders

Enterprise folders allow users to create their own folders to separate out just the reports they want to view. Enterprise folders can be used:

1. To filter reports that are accessed on a regular basis to have them all organized in one location **OR**
2. To filter reports that are accessed only occasionally to avoid having to remember the navigation

**Note**: *When Enterprise folders are created, they are saved locally on the user's C drive by default. As a result, if a user accesses the RDT from a different system after creating Enterprise folders, they **will not** see them on the second system.*

***Caution:*** *Enterprise Folders are not available to Mac Users.*

***Tip:*** *For users that may use multiple systems on a regular basis, users can click on the Preferences icon/button within the RDT and change the Enterprise Folder location from local C to a network location. If you need help with changing this setting, contact your Help Desk.*

The following is a description of the icons/buttons associated with Enterprise Folders:

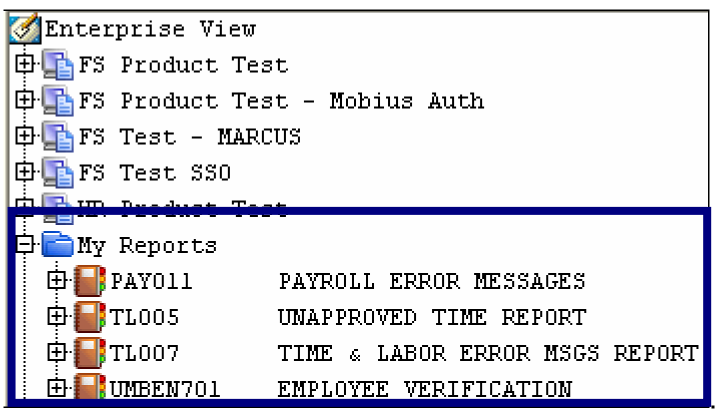
**Create an Enterprise Folder.** Click on this icon/button to create an Enterprise Folder. This folder can be renamed as needed. Subfolders can also be created much like Windows Explorer. (Enterprise view musty be selected to use this feature. See example below)

**Delete Enterprise Folder or Content.** Click on this icon/button to delete either the selected Enterprise Folder or selected file(s) within a folder.

**Copy Content to Enterprise Folder.** Click on this icon/button to add content to the selected Enterprise Folder.

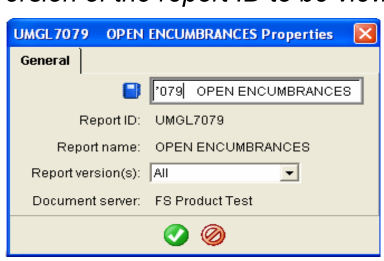
**The Move Content Icon.** Click on this icon/button to move content from one Enterprise Folder to another.

**Example:**




In the above example an Enterprise Folder called "My Reports" has been created and populated with specific reports unique to the user's needs. Additional Enterprise Folders could also be created to further organize reports as needed.

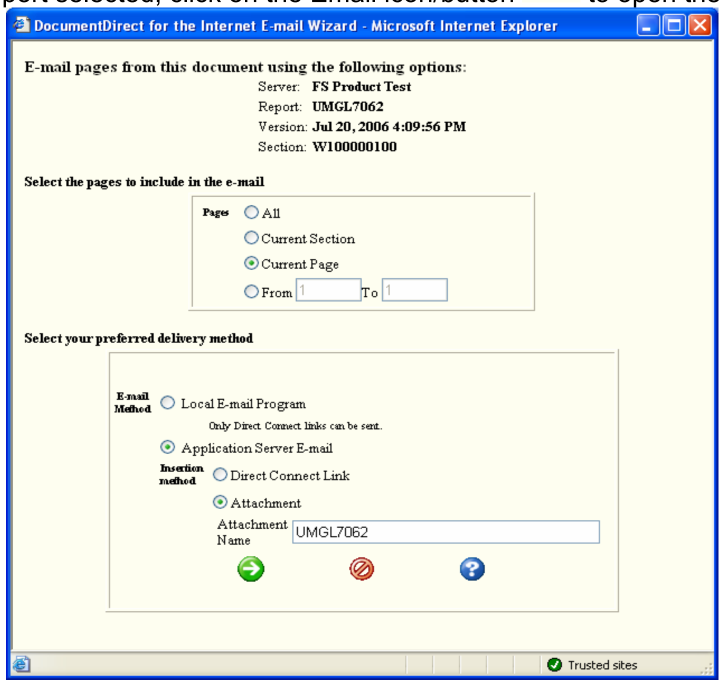
***Note:*** *Users can also right click on the content within an Enterprise Folder and (1) change the report title and/or (2) specify the version of the report ID to be viewed.*



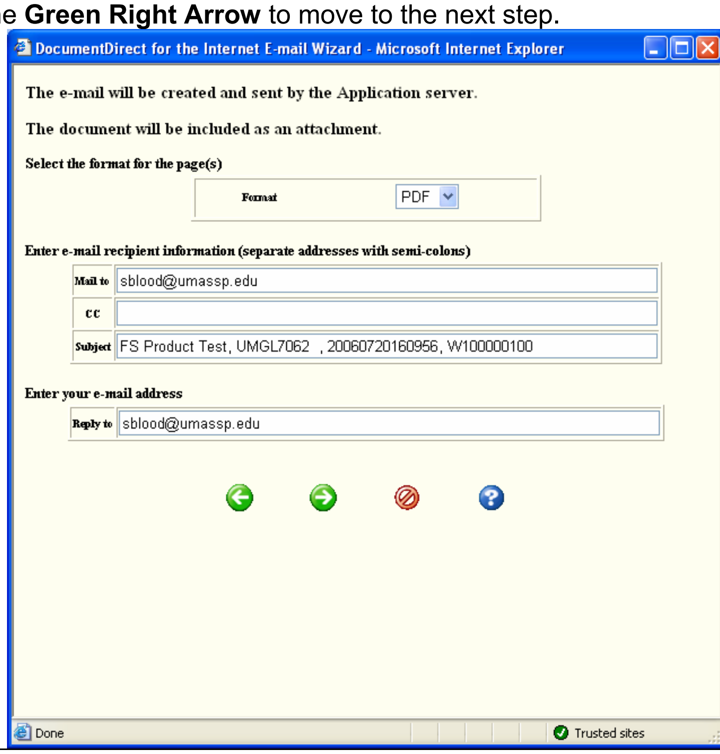
## Emailing Reports

Users will now have the ability to email any of the reports they have access to in the tool.

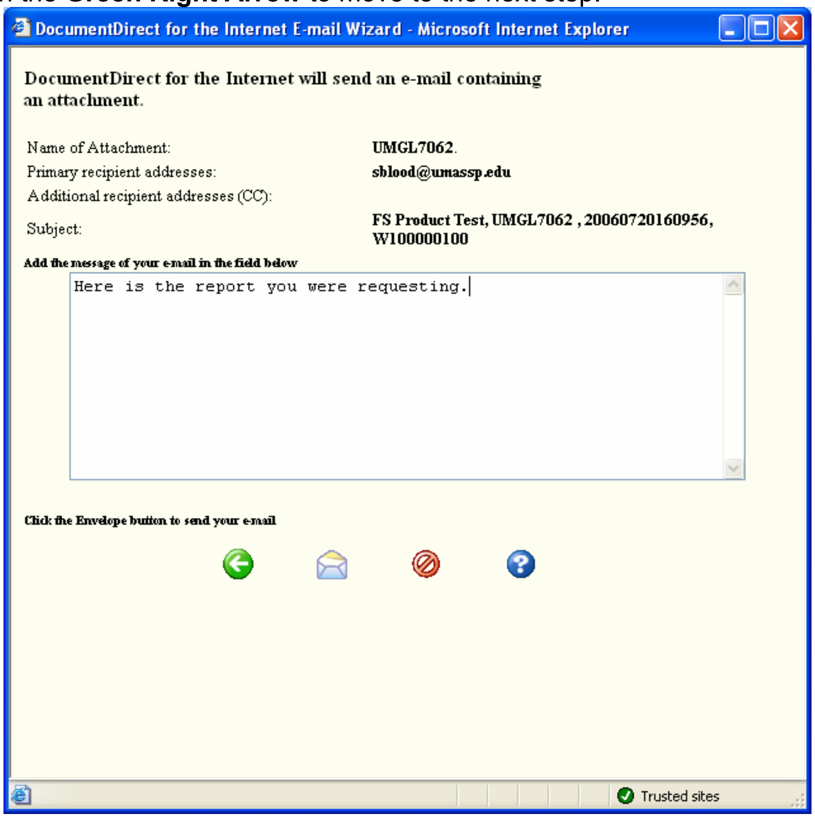
1. With the report selected, click on the Email icon/button to open the email wizard.




2. Specify the **pages** to be sent and the **delivery method**.
3. Click on the **Green Right Arrow** to move to the next step.



4. Specify the **format** for the report to be sent in.
5. Enter the **email address(es)** of the recipient(s). ***Note:*** *Full addresses should be entered separated by semicolons.*
6. Click on the **Green Right Arrow** to move to the next step.




7. Enter a **message** as needed.
8. Click the **Email** icon/button to send

***Note:*** *Users must be mindful of any attachment size restrictions that may be in place at each campus so as not to cause load issues for the mail server.*

***Note:*** *This method of emailing does not go through the campus mail server. As a result, a record of the message being sent will not appear in the sender's email.*

***Tip:*** *In order to keep a record of reports sent, email the report to yourself first and then forward the message from you email client from there.*

## Selecting Multiple Reports

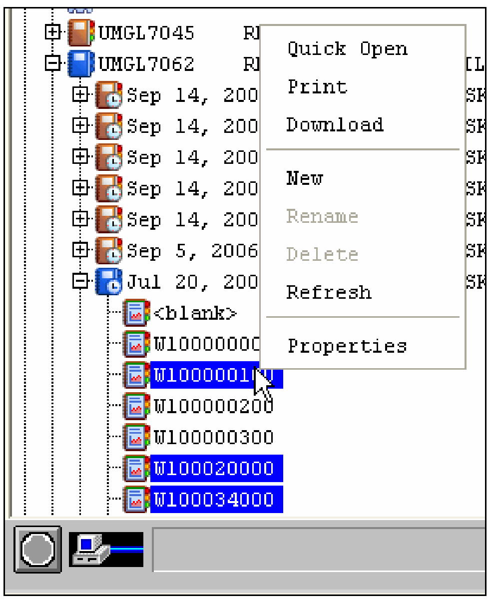
Users can now select multiple reports for printing or downloading.

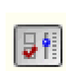
By using Windows type commands (**Mouse Click + Ctrl key**), multiple reports or sections can be selected for **Quick Open, Printing, or Download**

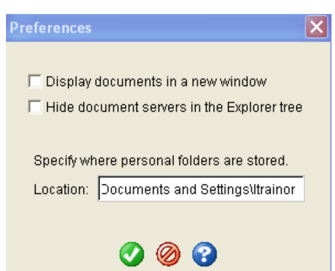
1. Simply click on the first report to be selected. Hold down the **Ctrl key** and click on the second report, etc.
2. Once all of the reports have been selected, click on the appropriate icon/button to **Quick Open**  **, Print**  **or Download**  the reports.

*__Note:__ Selecting the Print option brings up a pop up menu. To avoid problems with Printing, users should add __*.umassadmin.net__ to the trusted sites for pop ups within your internet browser. Contact the helpdesk for help if needed.*

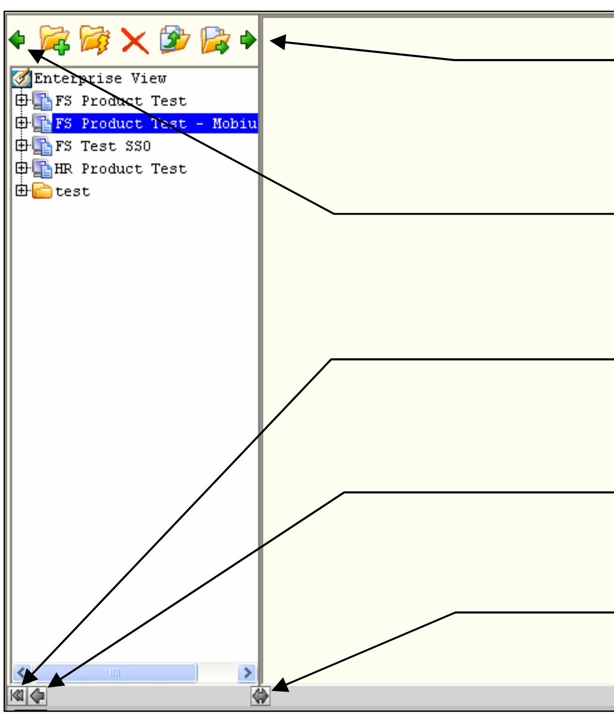
***Tip:*** You *can also right click with the reports highlighted to get the same options as shown below*




***Tip:*** *Click on the __Preferences Icon__*  *to change how reports are opened. Once opened, select the "Display documents in a new window" checkbox to have reports opened in separate windows.*



| Icon and Navigation Descriptions | |
|---|---|
| | **The Refresh Icon.** Allows users access the RDT database for any reports that have been run and archived during their active session. Users ***are no longer required to log out and back in*** to the RDT in order to refresh their view. |
| | **The Create Enterprise Folder Icon.** Click on this icon/button to create an Enterprise Folder. This folder can be renamed as needed. Subfolders can also be created much like Windows Explorer. (see example below) |
| | **The Quick Open Icon.** Click on this icon/button to open selected report(s). |
| | **The Delete Enterprise Folder or Content Icon.** Click on this icon/button to delete either the selected Enterprise Folder or selected file(s) within a folder. |
| | **The Copy Content Icon.** Click on this icon/button to add content to the selected Enterprise Folder. |
| | **The Move Content Icon.** Click on this icon/button to move content from one Enterprise Folder to another. |
| | **The Print Icon.** Click on this icon/button to printer selected report(s). |
| | **The Download Icon.** Click on this icon/button to download selected report(s). |
| | **The Search Icon.** Click on this icon/button to search for specific content/reports. |
| | **The Preferences Icon.** Click on this icon/button to change basic user preferences (location of enterprise folders and change how reports are viewed.) |
| | **The Help Icon.** Click on this icon/button to access the help feature of the application. |




Click here to scroll right to see additional icons

Click here to scroll left to see additional icons

Click here to hide the navigation window

Click here to narrow the navigation window.

Click here to resize the Navigation window.