

## Report Distribution Tool

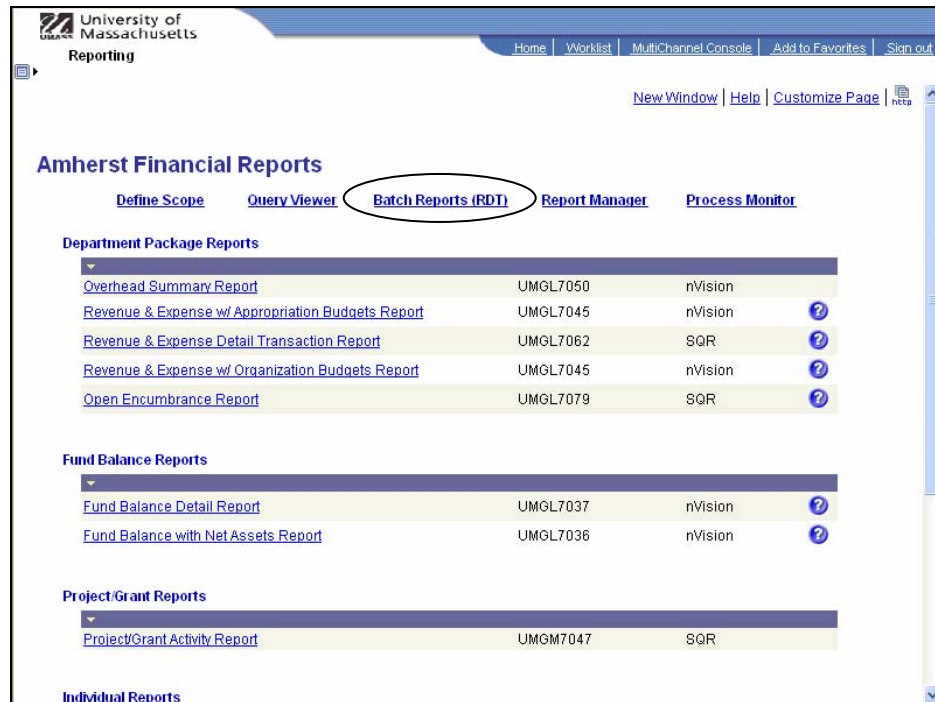


The Report Distribution Tool is where end users currently access reports. In e\*mpac Financials version 8.9 this tool will be where end users access batch reports only. This job aid is intended to inform the end user how to access their batch reports but most importantly how to access the Report Distribution Tool **within** the e\*mpac Financials application.

- Step 1.** Log into the e\*mpac Finance Application with your FIN Username and Password.

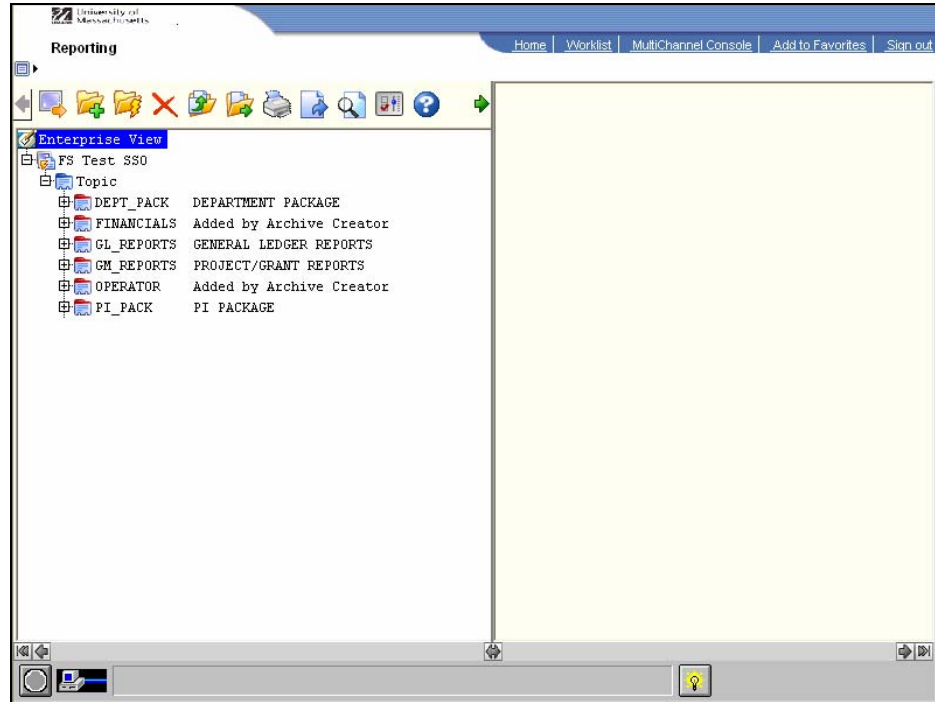


**Report Center → Grants (or Finance) → Batch Reports (RDT)**





Report Name	Report ID	System
Overhead Summary Report	UMGL7050	nVision
Revenue & Expense w/ Appropriation Budgets Report	UMGL7045	nVision
Revenue & Expense Detail Transaction Report	UMGL7062	SQR
Revenue & Expense w/ Organization Budgets Report	UMGL7045	nVision
Open Encumbrance Report	UMGL7079	SQR
Fund Balance Detail Report	UMGL7037	nVision
Fund Balance with Net Assets Report	UMGL7036	nVision
Project/Grant Activity Report	UMGM7047	SQR

- Step 2.** Click the [Batch Reports \(RDT\)](#) link.

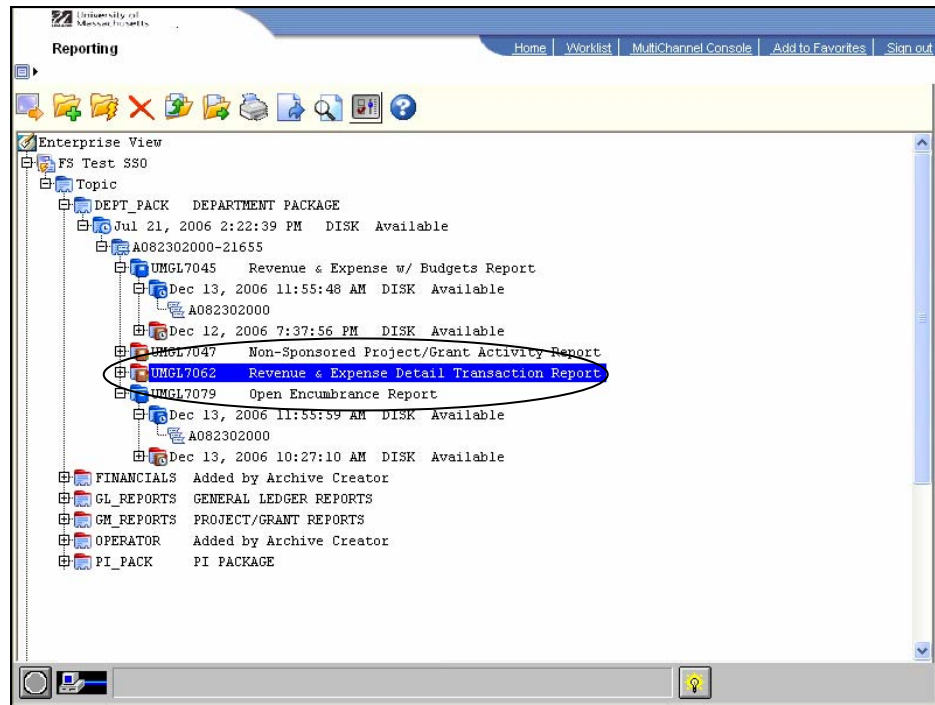



**Note:** The list of topics is similar to how the reports are currently organized. A new Topic Folder is the **PI Package** folder. This is where the PI and Decentral Grants managers will find the key reports for restricted grant projects.

- Step 3.** Open a Topic Folder by clicking the  next to the desired Topic Folder.
- Step 4.** Open the desired department or report by clicking the  next to the desired department or report.



**Note:** If there is only one report in a folder the report will open automatically. If there are multiple reports in a folder you will see a list of reports to choose. The reports will be timestamped and the most recent will be on the top of the list.



**Note:** After clicking on the report it will open in a separate window. You may find it necessary to resize the report when it first opens. You can do this by clicking the  as shown in the next screenshot.



DocumentDirect for the Internet Administrator - Microsoft Internet Explorer

University of Massachusetts  
Detail Transactions  
Business Unit: UMAMH  
From Period 11Fiscal Year 2006to Period11Fiscal Year2006

Department: A082302000 UM Ext OCM Bookstore  
Manager: Schrader,Robert  
FUND\_CODE: 21655 Umass Ext Trust

REVENUE

Account	Project/Grant	Prog	Class	Journal ID	Journal Date	SourceDescrip
All Revenues						
695000	General Income					
		000		CR0226023105/02/2006	CR	0000000
		000		CR0228612005/09/2006	CR	0000000
Account 695000 Total:						
Total Revenues						

PAYROLL

Journal

**End Procedure**

## The Refresh Button



The Refresh button introduced with the Report Distribution Tool upgrade will **NOT** be available in the Report Distribution Tool because the only reports that will be accessed will be batch reports. All User Executed reports will be retrieved through the **Report Manager** within the e\*mpac Financials application.

## 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 must 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.

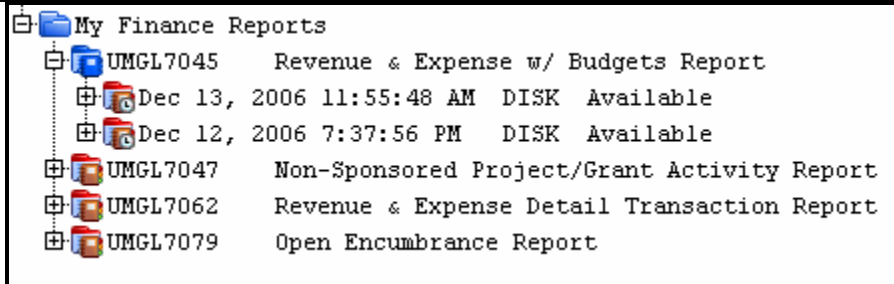


**Copy Content to Enterprise Folder.** Click on this icon/button to add content to the selected Enterprise Folder.



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

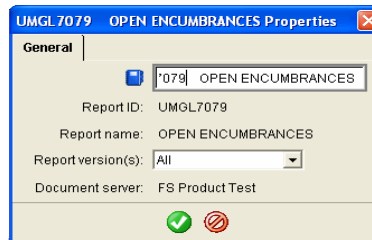
**Example:**



In the above example an Enterprise Folder called "My Finance 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 that use both FIN and HR will have separate locations to access Batch Reports post go-live.

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

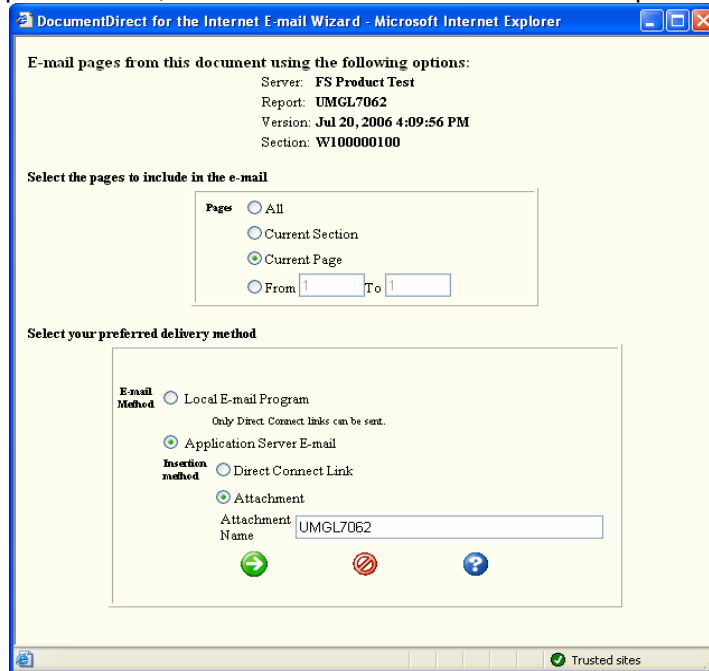


## Emailing Reports

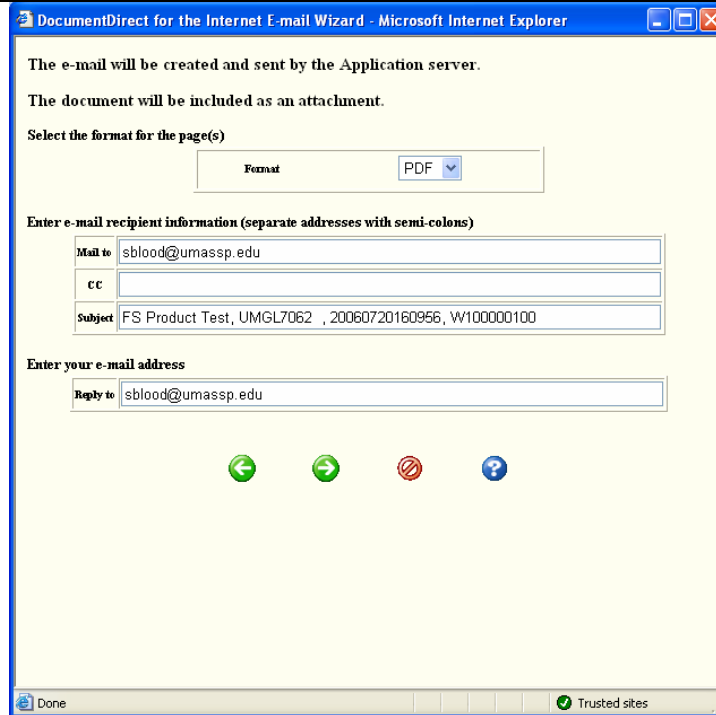


Users will now have the ability to email any of the reports they have access to in the tool.

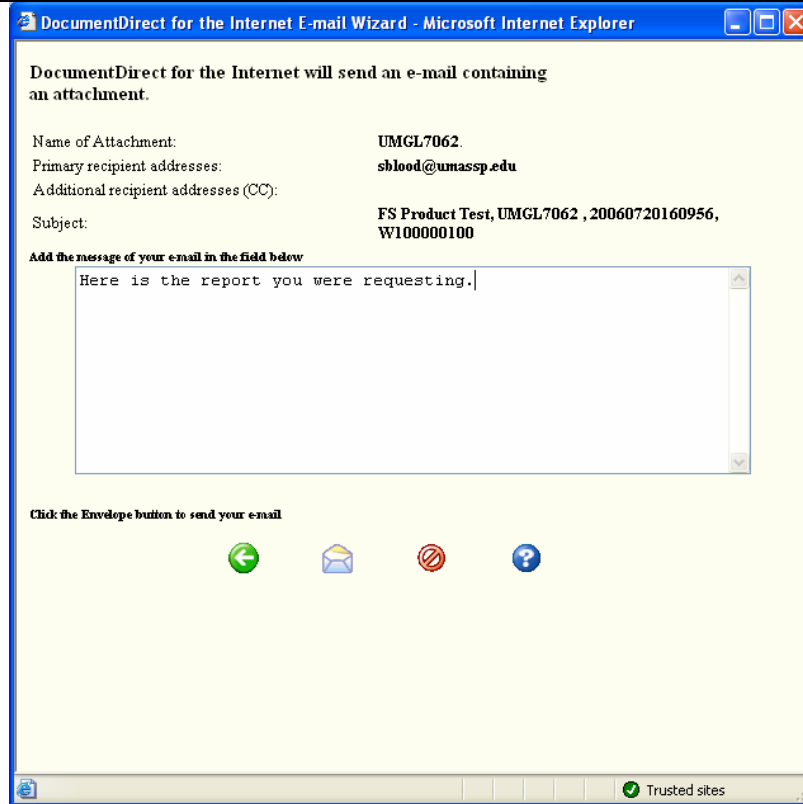
1. With the report selected, click on the Email icon/button  to open the email wizard.



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.

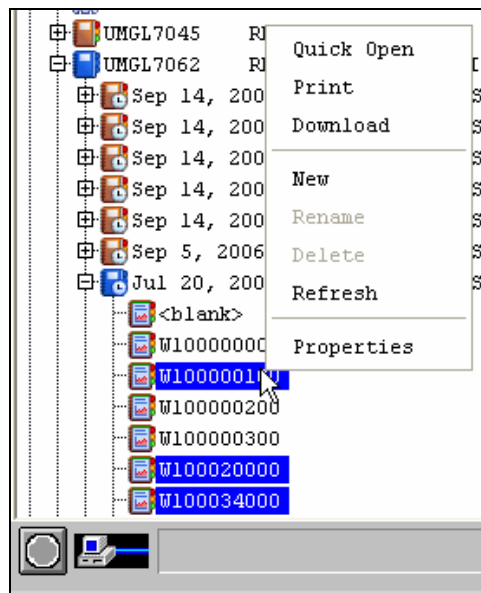
By using Windows type commands (**Mouse Click + Ctrl key**), multiple reports or sections can be selected for **Quick Open, Printing, or Download**


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**

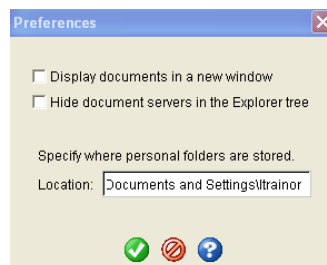
**Open**  , **Print**  or **Download**  the reports.











**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.



<b>Icon and Navigation Descriptions</b>	
	<b>The Create Enterprise Folder Icon.</b> 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)
	<b>The Quick Open Icon.</b> Click on this icon/button to open selected report(s).
	<b>The Delete Enterprise Folder or Content Icon.</b> Click on this icon/button to delete either the selected Enterprise Folder or selected file(s) within a folder.
	<b>The Copy Content Icon.</b> Click on this icon/button to add content to the selected Enterprise Folder.
	<b>The Move Content Icon.</b> Click on this icon/button to move content from one Enterprise Folder to another.
	<b>The Print Icon.</b> Click on this icon/button to printer selected report(s).
	<b>The Download Icon.</b> Click on this icon/button to download selected report(s).
	<b>The Search Icon.</b> Click on this icon/button to search for specific content/reports.
	<b>The Preferences Icon.</b> Click on this icon/button to change basic user preferences (location of enterprise folders and change how reports are viewed.)
	<b>The Help Icon.</b> Click on this icon/button to access the help feature of the application.



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<b>Last Edited Date</b>	<b>12/22/2006</b>
<b>Last Edited By</b>	<b>RB</b>