Risk Services Data Management System (RDMS)

"How To"

Export Report

Access to the RDMS is restricted and only granted by request. To request access to RDMS reports, see the RDMS Access Instructions.

Purpose

RDMS users may **create PDF outputs**, in addition to the online version of the reports. Depending on your permission level, you may also **create Excel outputs**. Please note that when selecting this option on a report containing sensitive information, it is the user's responsibility to safeguard the data. When in doubt, do not download sensitive data items.

Instructions

LOGIN

- 1. Go to URL https://dms.ucop.edu/dmscognos
- 2. Select your location from the dropdown
- 3. Click "next"
- 4. Login using your credentials and any location-specific multi-factor authentication steps

RUN REPORT

5. Execute report using the set of parameters you wish to export

EXPORT

- 6. Export to PDF
 - a. Click the downward "run" arrow
 - b. Click "Run PDF" to export data as a PDF

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- c. Click the download icon to download the document
- d. Click the print icon to print the document

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7. Export to Excel

- a. Click the downward "run" arrow
- b. "Run Excel" to export data as an Excel spreadsheet
- c. Open the file from your default "download" section

Note: This process may look slightly different depending on your browser and operating system. For Windows users, a pop-up will appear at the bottom of your screen

i. Click the file to open it directly in Excel

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8. Return to the online report

- a. Click the downward "run" arrow
- b. Click "Run HTML"

As a reminder, sharing is subject to UC security policies for sensitive data. Refer to applicable guidance and policies at your location about exporting and sharing sensitive data.

