

“How To” Save Customized View

Access to the RDMS is restricted and only granted by request. To request access to RDMS reports, see the [RDMS Access Instructions](#).

Purpose

If the default parameters for a report do not meet your needs, you can **save a customized version** in your “My content” folder with a set of defaults personalized for your needs.

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

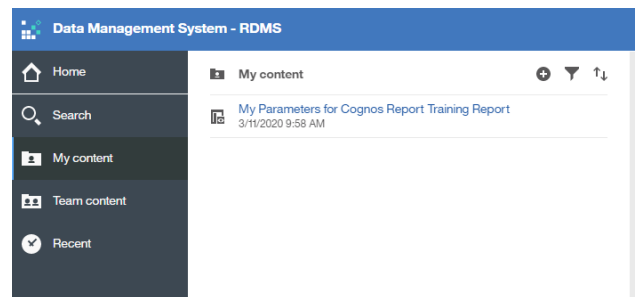
5. Execute report using the set of parameters you wish to save

SAVE


6. Click the **save (disk)** icon
 - a. Click “**save as report view**”
 - b. Click “**my content**” icon (folder with one person)
 - c. Choose the appropriate **folder** to save the customized report in *or*
 - i. Click the “+” icon to create a new folder
 - ii. Enter **title** of new folder
 - iii. Click **new folder**
 - d. Enter the **name of your customized report** in the “save as:” free text field
 - e. Click “**save**”

OPEN

7. Open saved report
 - a. Click “**my content**”
 - b. Click on the saved **report name**



Save as

 My content Choose "My content" folder here

There's nothing in this folder.

Destination: My content

Save as: Enter report name here