

## Purpose/scope

With the October 2007 migration of the GL/FA system from a Management Information Systems (MIS) mainframe to a Medical Center (MC) IBM mainframe, GL/FA reports (other than those available within the eDog application) are available through the MC TRMS/Web application. In addition, files previously downloaded from the MIS mainframe through the use of the TSO application will be retrieved through TRMS/Web.

This document includes information on basic features within the TRMS/Web application; for more detailed information you may refer to the Help information available in TRMS/Web by clicking on the Help icon



*Document effective period:* October 22, 2007 until further notice

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## Requesting access to TRMS/Web and specific reports/files

To request access to TRMS/Web and/or specific reports or files, please contact the appropriate security liaison for your department: Medical Center (MC) – Mary Robinson; Office of Contract and Grant Accounting (OCGA) – Michelle Vazin; All others – Matthew McGlasson.

## Logging into TRMS/Web


1. Open your internet browser.
2. Access TRMS/Web at the following web address: <http://ifm45wp-trms-vm/TrmsWeb/>.
3. In the login box, enter your Medical Center RACF ID and related password (the same used to log into the GL/FA system) in the User Name and Password fields, respectively. Click OK.

## Viewing reports/files


There are two methods for accessing reports and files for viewing within TRMS/Web: you may retrieve a list of all reports to which you have access or you may filter the list to only certain reports.

### Retrieving a list of all reports/files to which a user has access

1. Log into TRMS/Web.

2. On the TRMS/Web main page, click the Browse Preview button (). A directory of all reports/files to which you have access will be returned. You may sort the listing by clicking one of the headers at the top of the directory window: Report ID, Cycle #, User ID, Group ID, Number of Lines, Number of Pages, Job Name, Job #, Date, Time, and Distribution Name. (**Note:** The message “Some requested records denied by security” appears at the bottom of the list when a user has access to only a subset of all reports available in TRMS/Web; since no GL/FA user has access to all GL/FA reports in TRMS/Web, this message is appropriate and does not indicate an error in a user’s access.)
3. To view a report/file in the browser, click on the applicable row. The report/file will open in a separate window.
4. To close a report/file, simply close the browser window.
5. To preview reports/files before opening them, click the Browse Preview button again. Click “Preview” at the beginning of the applicable row and a preview of the data within the report/file will be shown below the directory. Click elsewhere within the row to open the full report in a separate window.
6. To turn off the preview option, click the Browse Preview button.

### **Retrieving a filtered list of reports/files to which a user has access**





1. Log into TRMS/Web.
2. On the TRMS/Web main page, click the Filter button (). The Filter Reports page will be opened.
3. Enter in the applicable field, the header information on which you wish to filter (e.g., Start Date and/or End Date) and click OK. You must always enter your User ID and the Report ID, regardless of the other criteria on which you are filtering. A partial string may be used for filtering certain fields (e.g., entering “GL” in the Report ID field will return all reports/files with a Report ID beginning with “GL”).
4. A list of reports/files that meet the criteria selected will be displayed. Follow steps 3-6 in the previous section to view or preview a report/file.
5. To return to the Filter Reports page, click the Filter button on your browser.
6. The five most recent filters applied are saved in a list below the filter criteria; these filters are then used collectively as “OR” statements as the criteria to produce a current listing. This filter history, however, is only saved for as long as you are logged into TRMS/Web. (**Note:** If you wish to resume using the Browse Preview button to retrieve a list of all reports/files as described in the section above, you will first need to remove any criteria stored in history by clicking the Remove All button.)

### **Archived reports**


Only two cycles, or instances, of a particular report/file can be maintained in the current TRMS database at any one time. Therefore, when the third instance of a report/file has been posted to TRMS, the oldest one will be archived. Most reports/files are archived for 255 days; a select few reports may be archived only 45 days. To access an archived report/file through TRMS/Web, contact the Informatics Help Desk at 3-HELP, provide them with the Report ID and run date and ask them to return the archived report to the current database.

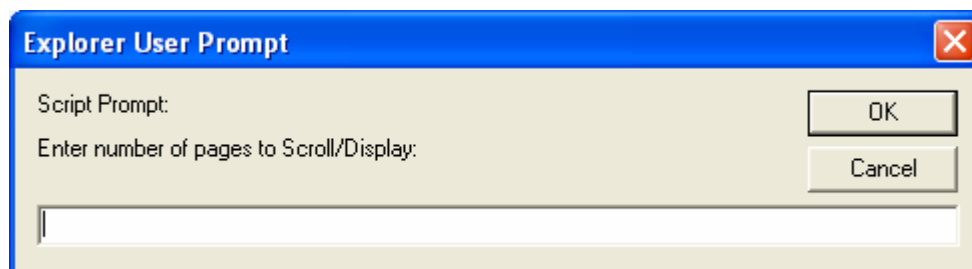
### **Setting number of pages**

When report/file is opened in TRMS/Web the default number of pages available in the browser window is up to 25. The total number of pages in the report may be found in the left side of the information bar at the bottom of the browser window (e.g., Page: 1 To 25 of 500).

To view additional sets of 25 pages you may use the arrow buttons at the top of the screen to select the next set of pages () , the previous set of pages () , the first set of pages () , or the last set of pages () .

You may also change the number of pages you want to see in each set by performing the following:

1. Click the Set Page Amount button () at the top of the window.
2. In the box below, enter the number of pages you want displayed in each page set (e.g., if you want the entire 500 pages of a report displayed, enter “500”):




**Note:** You will receive an error if you enter more than the number of pages in the report.


3. Click OK.

In the example above, you should now see “Page: 1 To 500 of 500” in the information bar.


## Converting reports to a PDF format

1. Open a report using the steps in Section D.
2. Set the number of pages you wish to display as per the steps in Section E above (TRMS will default to only converting to PDF only those number of pages defined as the set).
3. Click the Toggle HTML/PDF button () at the top of the window.
4. You may then use the selected Adobe Acrobat functions shown above the report to perform actions such as print the report or save it to a specified location.

## Printing reports/files

1. Open a report using the steps in Section D.
2. Click the Print This Report button () at the top of the window. (**Note:** If you click this button while still in the PDF view, you will get an error message that printing is not supported for the PDF format. Follow step 4 in Section G to print in the PDF format.)
3. In the Print Report window, select the number of pages to print (the page range to print defaults to the number of pages currently defined as the set) or All pages and the number of lines per page.
4. Click OK.
5. In the Windows Print dialog box, select the printer to which you wish to print, change any desired printer-specific settings (e.g., printing in landscape mode), and click Print.

## Downloading reports/files


1. Open a report using the steps in Section D.
2. Click the Download This Report Locally button () at the top of the window.
3. In the Download Report window, select the file format in which you wish to save the download. (**Note:** No reports or files have been currently formatted to allow for downloading in either the .csv or .xls formats.)
4. Select the number of pages to be downloaded (the page range defaults to the number of pages currently defined as the set) or All pages.
5. Click OK.
6. In the Windows Download File dialog box, select open to open the download in the related application (e.g., text files open in Notepad) or select save to save the download to a specified location.

**Note:** The following cautions related to downloading reports/files were noted in the TRMS/Web help information:


*There are also known issues when attempting to download large reports. When the user downloads a particular report, the report transfer may be hindered, or even interrupted, by a large amount of network traffic. To ensure a complete report download, the amount of lines for a report download should be limited or the report download should be attempted at a time when there is less network traffic.*

*There is also a known issue with attempting to download a report in HTML format and choosing the "Open this file from its current location" option instead of the "Save this file to disk" option. Due to the nature of the manner in which HTML pages are loaded into Internet Explorer, this option seems to lock the browser and never get freed. Microsoft has acknowledged that this is an Internet Explorer problem and will be fixed in a future service pack for Internet Explorer 6.0 or in a new release of Internet Explorer. So when a user is attempting to download a report in HTML format, they should always choose the "Save file to disk" option, then open the report from there.*

## Emailing reports/files

1. Open a report using the steps in Section D.
2. Click the Email This Report button () at the top of the window.
3. In the Email Report window, enter the To, From (delete the default address "Computer.Operations.CSA@internal.email.vanderbilt.edu") and, if applicable, BCC email addresses. If needed, enter text in the Subject and Message boxes.
4. Select the file format in which you wish to email the report/file. (**Note:** No reports or files have been currently formatted to allow for downloading in either the .csv or .xls formats. Also, if you select the URL Only file format, the recipient must have access to TRMS/Web and the related report to be able to view the report/file in TRMS/Web.)
5. Select the number of pages to be downloaded (the page range defaults to the number of pages currently displayed) or All pages.
6. Click OK.
7. Once the report/file has been sent, you will see a Sent Message Confirmation window. Click OK to return to the Email Report window or close to exit out of both the Sent Message Confirmation and Email Report windows

## Window Directory

The Window Directory feature is not available to GL/FA TRMS/Web users. If you click the Window Directory button () , you will receive an error message. Click OK to close the error message and then close the Window Directory window to return to your report/file.

## TRMS/Web assistance

For GL/FA-related TRMS/Web assistance other than accessing archived reports/files (see Section E above), please contact the Office of Financial Affairs at [ofa@vanderbilt.edu](mailto:ofa@vanderbilt.edu).