

Welcome



Accessing Your Banner Reports

▶ Objective

Show e~Print users how to select, retrieve, view, save, and print e~Print reports from their browsers.

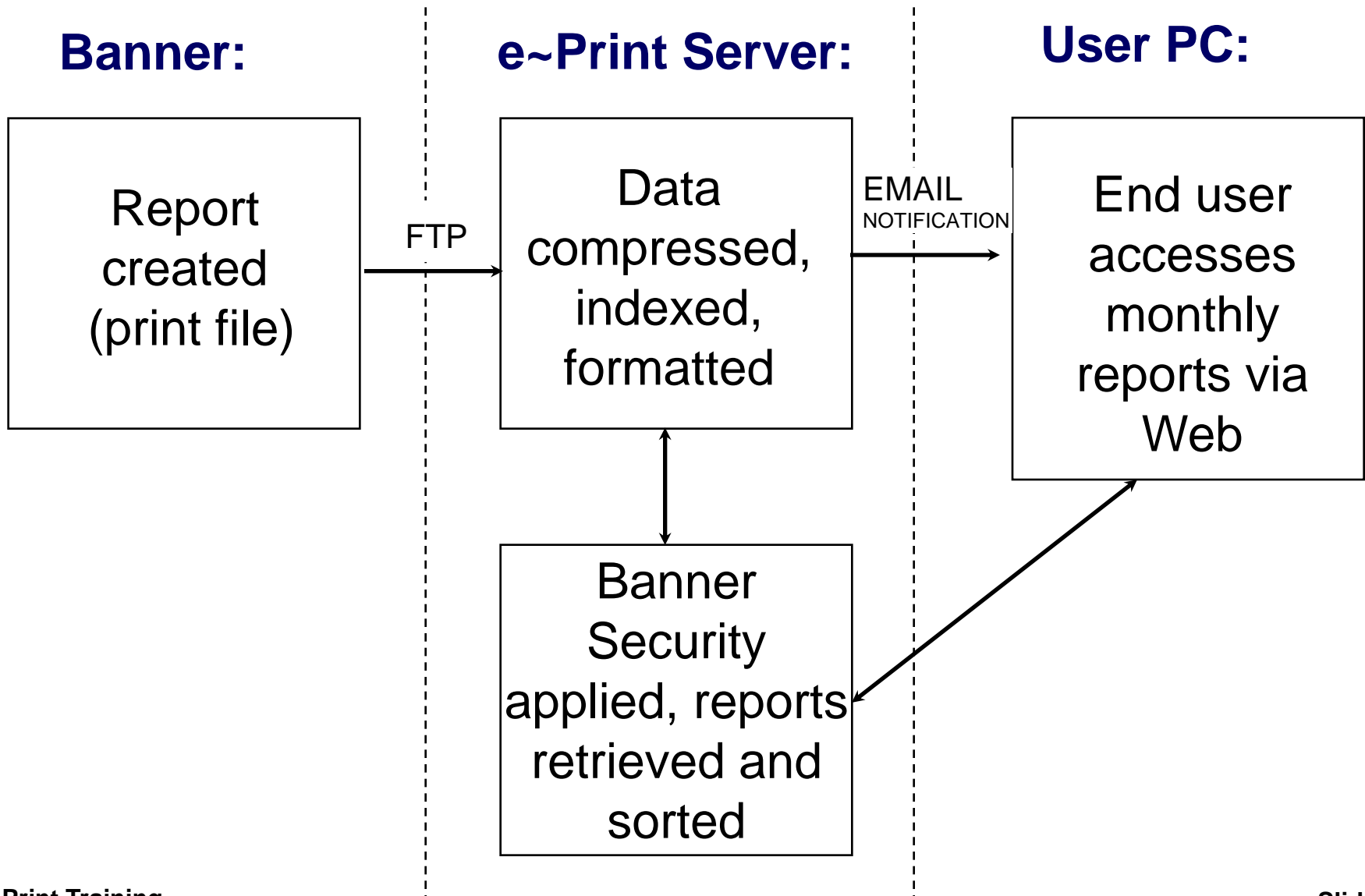
▶ Intended Use

Self-Training
Guided Training Sessions

▶ Time Required

20 minutes

- ▶ **System Overview/Security**
- ▶ **Prerequisites**
- ▶ **Using e~Print Help**
- ▶ **Logging Into e~Print**
- ▶ **Selecting a Report**
- ▶ **Viewing/Printing a Report**
- ▶ **Using Adobe Acrobat reader**
- ▶ **Logging Out of e~Print**
- ▶ **Tips/Troubleshooting**



▶ **Banner System Account**

If you don't already have a Banner UserID, see "Getting a Banner UserID" located on the IST Banner web site

▶ **Current Web Browser**

Microsoft® Internet Explorer 4.0 or higher
Netscape® Communicator 4.0 or higher

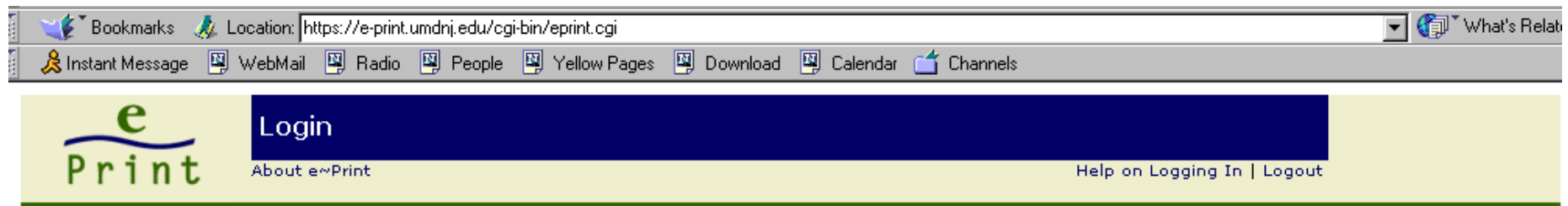
▶ **Adobe Acrobat® Reader**

You should already have this on your PC. If not, download the latest version (free) from *www.adobe.com*
Run within your browser or run in a separate window

► To access your e-Print reports using Netscape, type into the Location box:

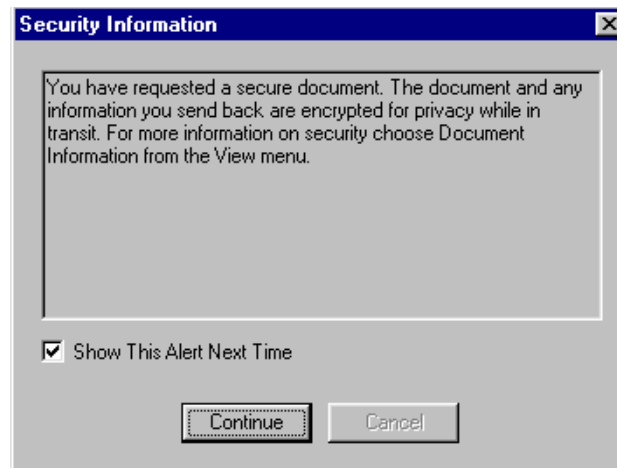
https://e-print.umdnc.edu

Please note it's https, not just http!



User ID:	<input type="text"/>
Password:	<input type="password"/>
Repository:	<input type="text" value="PROD 1 Finance"/>
<input type="button" value="Enter"/>	

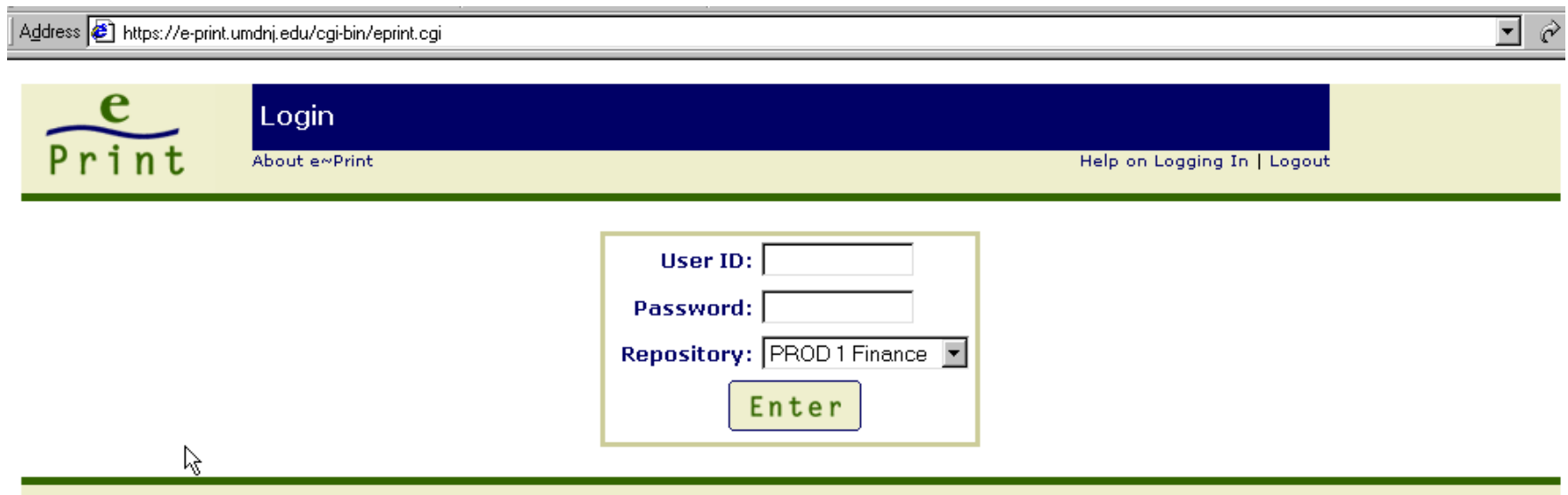
► The first time you log in using Netscape, you'll get the message box pictured below. This verifies that our site is secure! You can unclick the *Show This Alert Next Time* checkbox if you don't want to view this message again. Then click *Continue*.





► To access your e-Print reports using Internet Explorer, type into the Address box:


https://e-print.umdnc.edu

Please note it's https, not just http!

A screenshot of an Internet Explorer browser window showing the e~Print login page. The address bar contains the URL 'https://e-print.umdnc.edu/cgi-bin/eprint.cgi'. The page header includes the e~Print logo, a 'Login' button, and links for 'About e~Print', 'Help on Logging In', and 'Logout'. The main content area features a login form with fields for 'User ID', 'Password', and 'Repository' (set to 'PROD 1 Finance'), and an 'Enter' button.

Address  https://e-print.umdnc.edu/cgi-bin/eprint.cgi

 **Login** [About e~Print](#) [Help on Logging In](#) | [Logout](#)


User ID:
Password:
Repository: 




- ▶ **Every page (even login page) has a link to context-sensitive Help.**
- ▶ **Every Help page has a link to:**
 - Contents Page**
 - Alphabetized Index**
 - Related Topics**

An Example of Help

The picture below is an example of the extensive Help screens that can be found in e~Print. All e~Print screens have a context-sensitive Help link (see previous slide). Once inside Help, you can see the entire Help contents, or view the Help index.

A screenshot of a help page titled 'Using the Report List'. The page has a blue header with the e~Print logo on the left and the title 'Using the Report List' in white. Below the header, there are three underlined links: 'Help Contents', 'Help Index', and 'Using Help'. The main content area contains two paragraphs of text. The first paragraph explains that the report list is the second level of report selection. The second paragraph describes how report instances are listed in chronological order. At the bottom, there is a highlighted green box with the text 'To retrieve a particular instance of a report in PDF:'. Two red arrows point from the text above to the 'Help Contents' and 'Help Index' links in the screenshot.

 **Using the Report List**

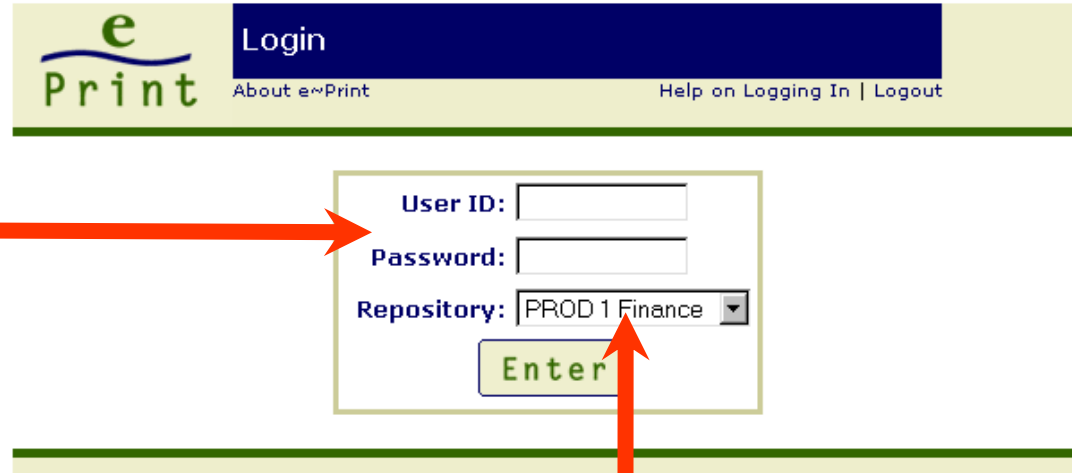
[Help Contents](#) | [Help Index](#) | [Using Help](#)

The report list is the second level of report selection screen in e~Print. This page appears when you select the "See Report List" icon next to a report type on the [repository list](#). It displays all of the instances of that particular report that are on file in the system.

The report instances are listed in chronological order, from the most recent to the oldest versions. For each run, the report list includes the report title and the date and time it was run on the mainframe. Depending on your requirements and the report parameters, you may be able to take one of the following actions:

To retrieve a particular instance of a report in PDF:

1. Key in your Banner User ID and password.












The screenshot shows the e~Print login interface. At the top left is the e~Print logo. To its right is a dark blue header with the word "Login" in white. Below the header, there are two links: "About e~Print" and "Help on Logging In | Logout". The main login area contains three input fields: "User ID:" with an empty text box, "Password:" with an empty text box, and "Repository:" with a dropdown menu showing "PROD 1 Finance". Below these fields is a green "Enter" button. A red arrow points from the "User ID" text in the first step to the User ID input field. Another red arrow points from the "Enter" button to the second step.


2. The correct repository will default in.
3. Click Enter.

Using the Repository List

► The repository list displays all of the reports to which you have access in the selected repository. (When you log into the system, you selected a repository from a drop-down list. When you press the Enter button on the Login page, the repository list appears.) For each report type, the repository list includes the report name, description and the latest date and time that type of report was run.

Report	Description	Latest Date
PDF TEXT 	FGRACCI Account Index Report	Fri Jul 06, 2001 1:00pm
PDF TEXT 	FGRACTH Account Hierarchy Report	Fri Jul 06, 2001 1:00pm
PDF TEXT 	FGRFNDH Fund Hierarchy Report	Fri Jul 06, 2001 1:00pm
PDF TEXT 	FGRLOCH Location Hierarchy Report	Fri Jul 06, 2001 1:01pm
PDF TEXT 	FGRORGH Organizational Hierarchy Report	Fri Jul 06, 2001 1:01pm
PDF TEXT 	FGRPRGH Program Hierarchy Report	Fri Jul 06, 2001 1:02pm
PDF TEXT DATA 	FYR112R Budget Status Report	Wed Jun 20, 2001 3:32pm
PDF TEXT 	FYRGRNT Budget Status Report	Wed Jun 20, 2001 4:24pm





Click here to see a drop-down list of all reports

Click here to see the next page of reports

Use the Icons as a Guide

**Simply
point-
and-
click
to...**



Click on this icon to view (or print) the most recent version of a report in PDF format (Acrobat Reader)



Click on this icon to download the TXT version of a report to your computer (you can import text files to Excel using the Text import Wizard)



Click on this icon to download the CSV (comma separated values) version of a report. Excel will directly open CSV files (not all reports will have this option)

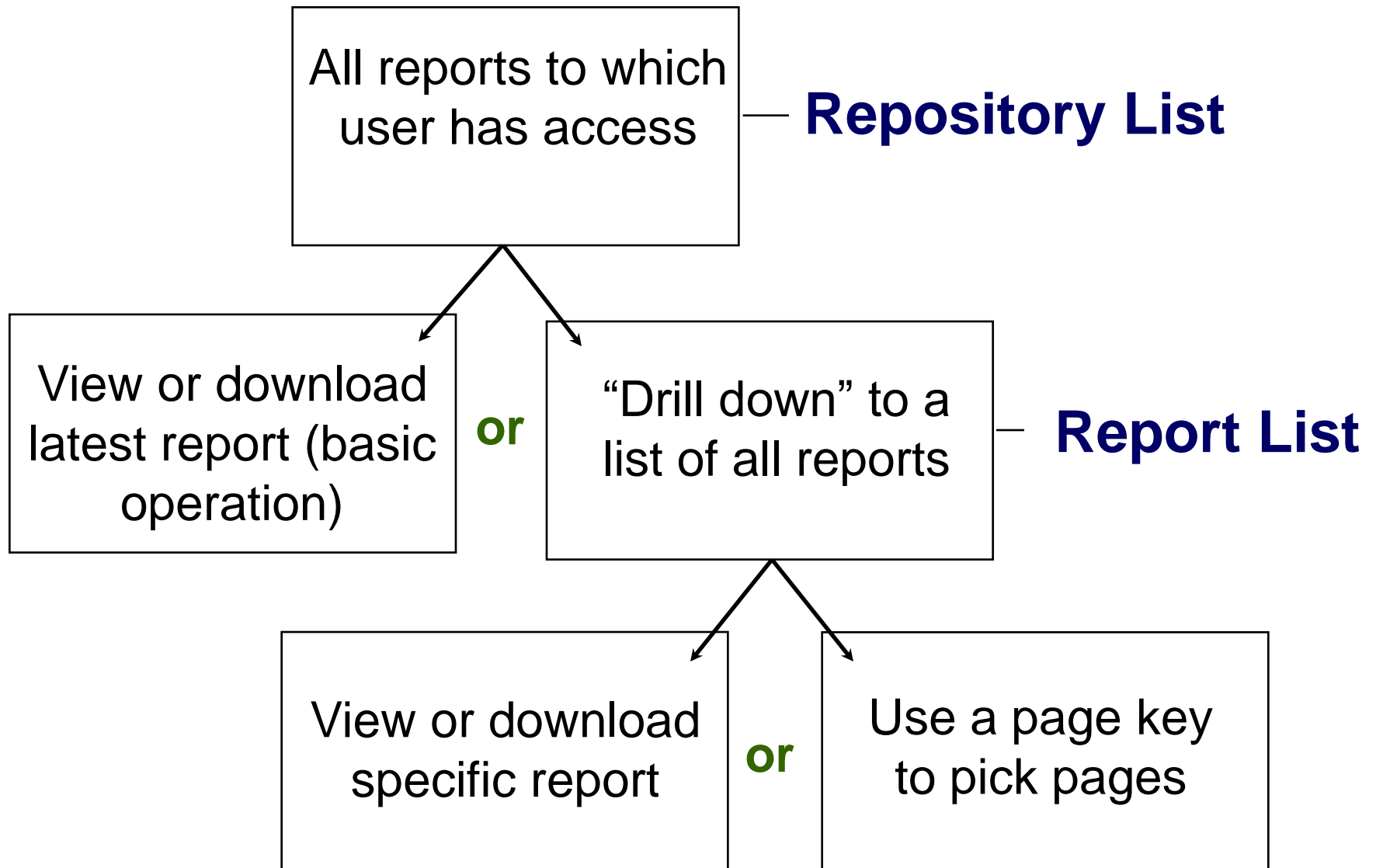


“Drill down” (used for accessing older versions of reports or when there are multiple versions of a monthly report)



Use a page key to pick pages (Search Report) or if you want to use a page key to save select information from a report

“Drilling Down” to Select a Report



- ▶ Lists all of the reports on file for the selected report type.

Mark : FYRFSMR

	Title	Date
  	FINANCIAL STATEMENT MANAGEMENT REPORT AS OF 31-JUL-2001 Current Year Purchase Order Activity	Fri Aug 10, 2001 6:58pm
  	FINANCIAL STATEMENT MANAGEMENT REPORT AS OF 31-JUL-2001 Current Year Purchase Order Activity	Wed Aug 08, 2001 10:39am

Using a Page Key

- ▶ If the “Search Report” (looking glass) icon appears, you can select a page key and then...

Select a page key to choose from

The screenshot shows a search report interface with three main sections. At the top, there is a 'Page Key:' label with a dropdown menu showing 'Orgn' selected. Below this are two boxes. The left box is titled 'Pick Values Manually' and contains a 'GO' button. The right box contains a dropdown menu with 'Orgn' and 'Fund' options, and a 'GO' button. At the bottom, there is a 'Range:' label followed by two input fields and a 'GO' button. Red arrows point from the text labels to these elements: one from 'Select a page key to choose from' to the 'Page Key' dropdown, one from 'Pick values manually' to the 'Pick Values Manually' box, and one from 'Provide a specific value' to the 'GO' button in the right box. A blue arrow points from the 'Range' section to the 'Indicate a range of values' text.

Pick values manually

Indicate a range of values

Provide a specific value

(Use 1 of these options.)

Click the checkboxes next to the values you want to select.

Choose Fund Mark Repository dambrol
About e~Print Help on Selecting Page Key Values | Logout

Mark : FYR112R : Pick Pages : Fund

<input checked="" type="checkbox"/> RA1503	<input type="checkbox"/> RA1734	<input type="checkbox"/> RA1893	<input type="checkbox"/> RA1943
<input type="checkbox"/> RA1510	<input type="checkbox"/> RA1774	<input type="checkbox"/> RA1903	<input type="checkbox"/> RA1945
<input type="checkbox"/> RA1571	<input type="checkbox"/> RA1775	<input type="checkbox"/> RA1906	<input type="checkbox"/> RA1966
<input type="checkbox"/> RA1600	<input type="checkbox"/> RA1787	<input type="checkbox"/> RA1925	<input type="checkbox"/> RA1973
<input type="checkbox"/> RA1617	<input type="checkbox"/> RA1847	<input checked="" type="checkbox"/> RA1927	<input type="checkbox"/> RA1974
<input type="checkbox"/> RA1637	<input type="checkbox"/> RA1848	<input type="checkbox"/> RA1931	<input type="checkbox"/> RA1975
<input type="checkbox"/> RA1643	<input type="checkbox"/> RA1861	<input type="checkbox"/> RA1939	<input checked="" type="checkbox"/> RA1984



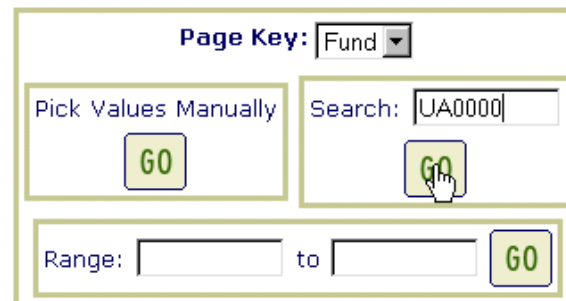
Get the Report

You can skip to a specific value.

Navigation buttons

Click the icon after making your selections.

- ▶ To provide a specific value for the page key, type in a value in the “Search” field and click GO. If the value is on file, the validation page will be displayed. (The validation page is described later in the training session.) If the search value is not on file, an error message will appear and you can try again.

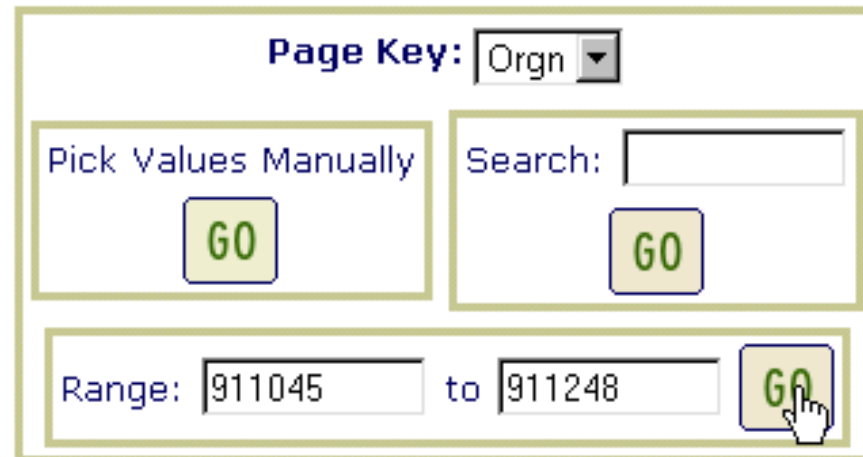


The screenshot shows a web interface for selecting page keys. At the top, there is a dropdown menu labeled "Page Key:" with "Fund" selected. Below this are three main sections:

- Pick Values Manually:** A box containing a green "GO" button.
- Search:** A text input field containing "UA0000" and a green "GO" button with a mouse cursor hovering over it.
- Range:** A section with two empty text input fields separated by "to", followed by a green "GO" button.

Selecting A Range of Values

- ▶ To select a range of values, key in the beginning and ending values and click GO. If the range contains valid values, e~Print will display a validation page (the validation page is described later in the training session). If not, an error message will appear.

A screenshot of the e~Print interface showing the 'Range' selection process. At the top, there is a 'Page Key:' label followed by a dropdown menu with 'Orgn' selected. Below this, there are two boxes: 'Pick Values Manually' with a 'GO' button, and 'Search:' with an empty text box and a 'GO' button. At the bottom, there is a 'Range:' label followed by two text boxes containing '911045' and '911248', with 'to' between them, and a 'GO' button with a mouse cursor hovering over it.

Page Key:

Pick Values Manually

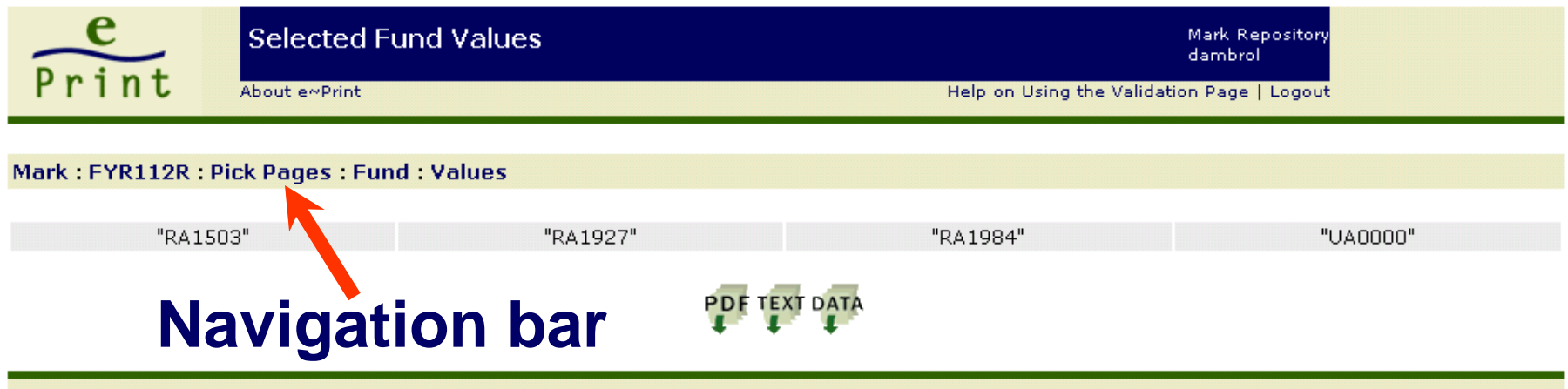
Search:

Range: to

- ▶ **Displays selected page key values.**

If satisfied with your selections, click the “PDF” (View PDF), “TEXT” (Download Text) or “DATA” (Download CSV) icon. To backtrack and change your selections, use the navigation bar (click on Pick Pages).

- ▶ **Validation page does not appear if no page key was used.**



Selected Fund Values

Mark Repository
dambrol

About e~Print Help on Using the Validation Page | Logout

Mark : FYR112R : Pick Pages : Fund : Values

"RA1503"	"RA1927"	"RA1984"	"UA0000"
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PDF TEXT DATA

Navigation bar

- Provides a shortcut to previous pages. Click a section to return to that page.

Repository List

Report List

Search Report (Pick Pages)

Page Key Values

Validation Page

PROD 1 Finance : FYR112R : Pick Pages : Orgn : Values

▶ Viewing a PDF report:

You can use Adobe Acrobat® Reader's view buttons, or use the View menu to adjust how the report will be displayed.



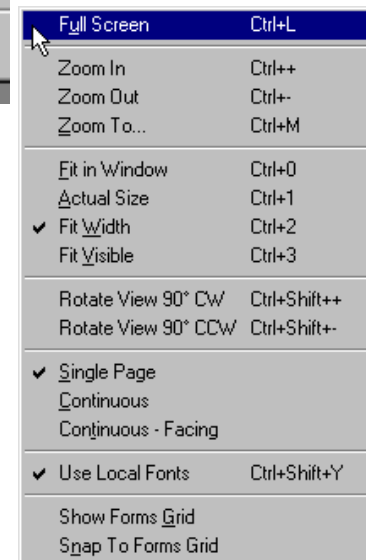
▶ Printing or Saving a PDF report:

WITHIN Adobe Reader, use the Save or Print icons, or the File menu.

▶ Viewing/Hiding the Navigation Pane:

Click on the icon to view or hide the Navigation pane, which contains all the bookmarks for that report.

▶ Consult Adobe Acrobat® Reader's Help and e~Print's Help for more detail.

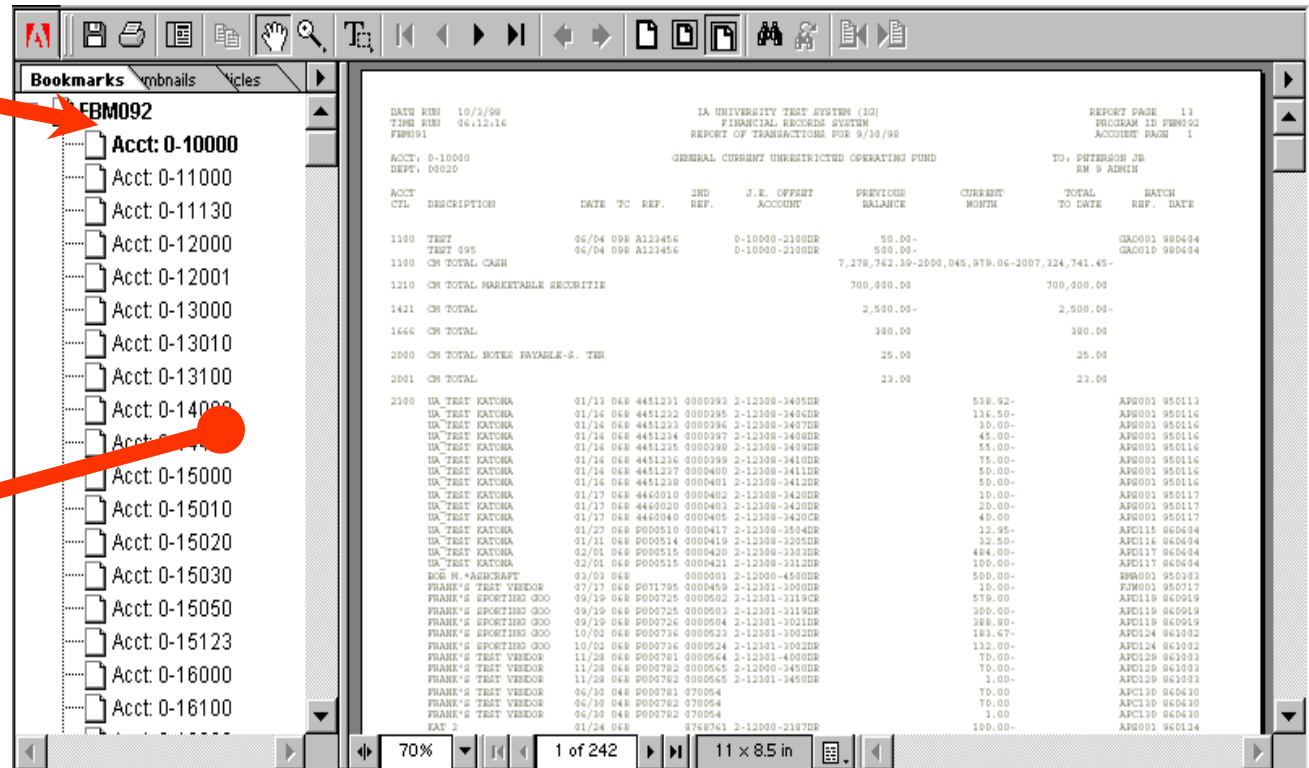


Navigation
Pane icon

Bookmarks correspond to page key values

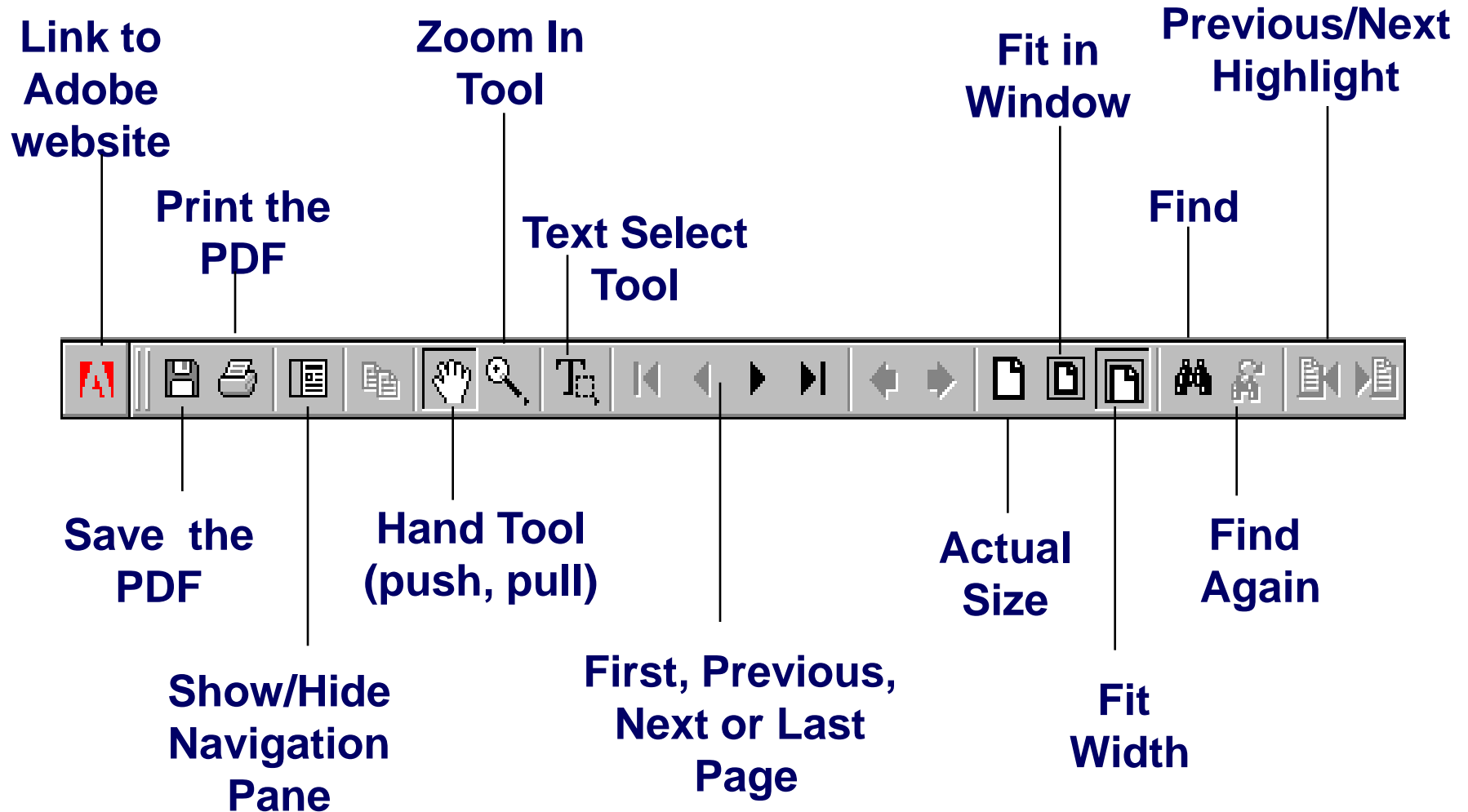
Acrobat® Reader's Navigation Pane

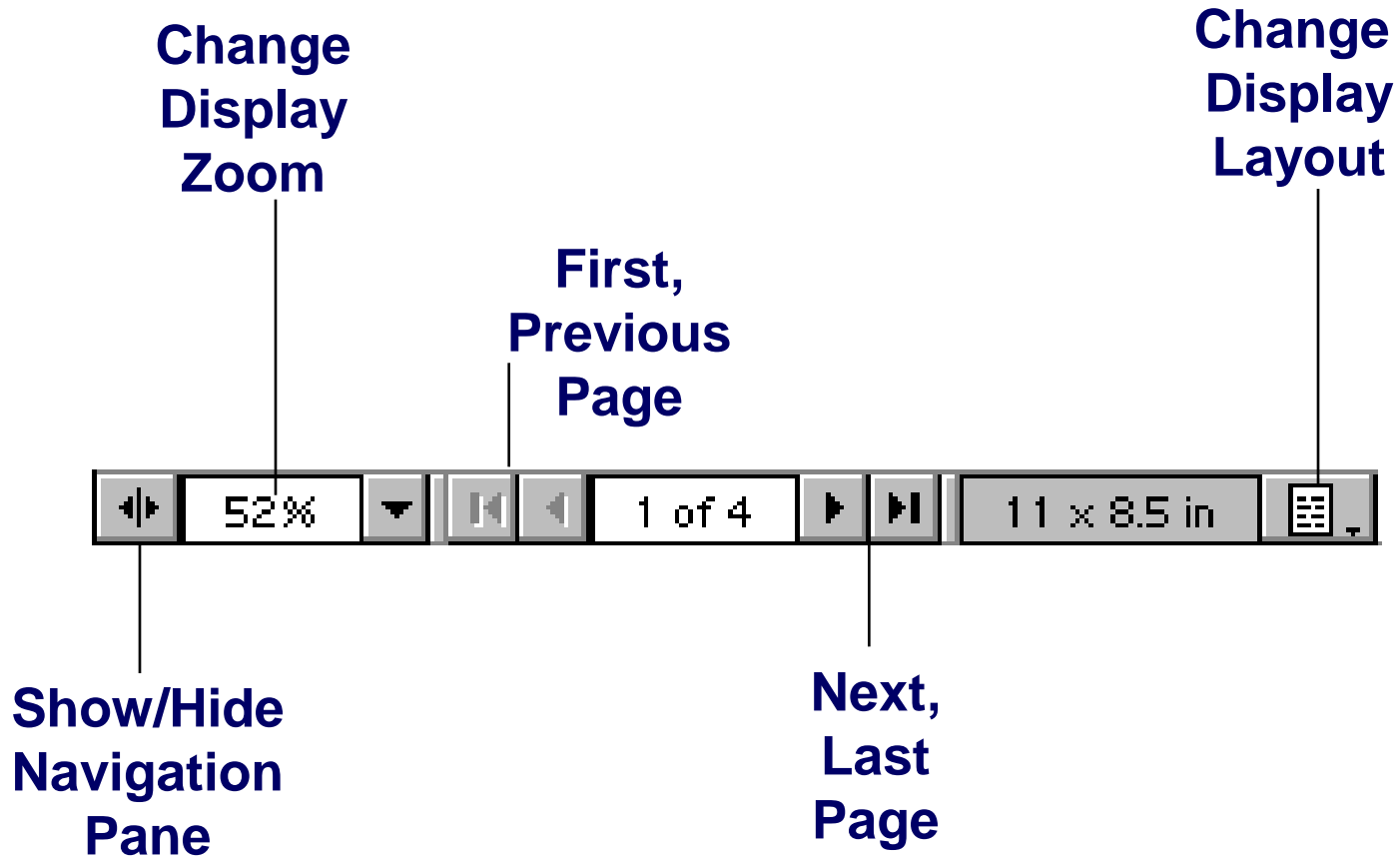
Toolbar buttons

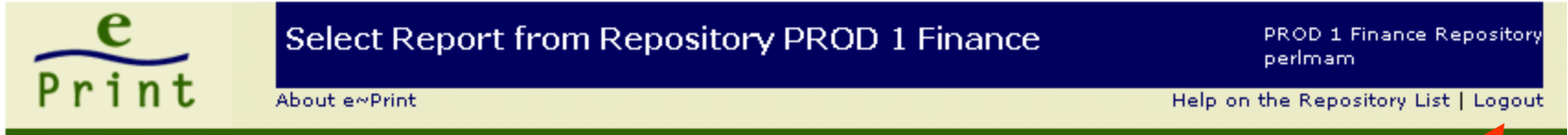


Toolbar buttons

Using Acrobat® Reader's Tools (1 of 2)







- ▶ Click the *Logout* link in the top, right-hand corner of any page, if your browser will remain open.
- ▶ You will logout automatically when you close your browser.

- ▶ **To avoid display problems when using Microsoft® Internet Explorer, configure Adobe Acrobat® Reader to run outside your browser (see next slide).**

- ▶ **To download a text file using Microsoft® Internet Explorer, right-click the “Download Text” icon and select *Save Target As*. With Netscape® Navigator, use the primary mouse button (usually the left mouse button).**

- ▶ **1. Open a report using the steps outlined previously.**
- ▶ **2. Open the General Preferences dialog of Acrobat Reader.**

Click the right-facing arrow at the top of the right-hand side of the application's viewing area; then select Preferences from the menu.

NOTE: When using Microsoft® Internet Explorer to retrieve a PDF file, sometimes the window appears blank. If this happens, try clicking the Refresh button, which should cause Acrobat® Reader and the PDF file to both appear on the screen. Then you can click the arrow and open the Preferences dialog, as described above.

- ▶ **3. Turn off the web browser integration feature.**

De-select (clear) the "Web Browser Integration" checkbox at the bottom of the dialog and click the OK button.

The next time you download an e~Print report as PDF, a "File Download" dialog will appear. To open the report in Acrobat® Reader, select the option button that reads "Open this file from its current location." (If you don't want the dialog box to appear each time you download PDF, de-select the "Always ask..." checkbox.) Then click the OK button. Acrobat Reader will open in a stand-alone capacity with the selected report in context.



Questions?

Call the IST Service Center at 3-3200

- or -

Contact Your Business or Grants Manager