

## HOW TO USE E~PRINT

### *What is e~Print?*

e~Print is an Internet-native application providing institutions with a way to securely and quickly distribute reports to users across the institution or around the world. e~Print uses a Web browser and free Adobe Reader to view and search reports.

### *Who is using e~Print to distribute reports?*

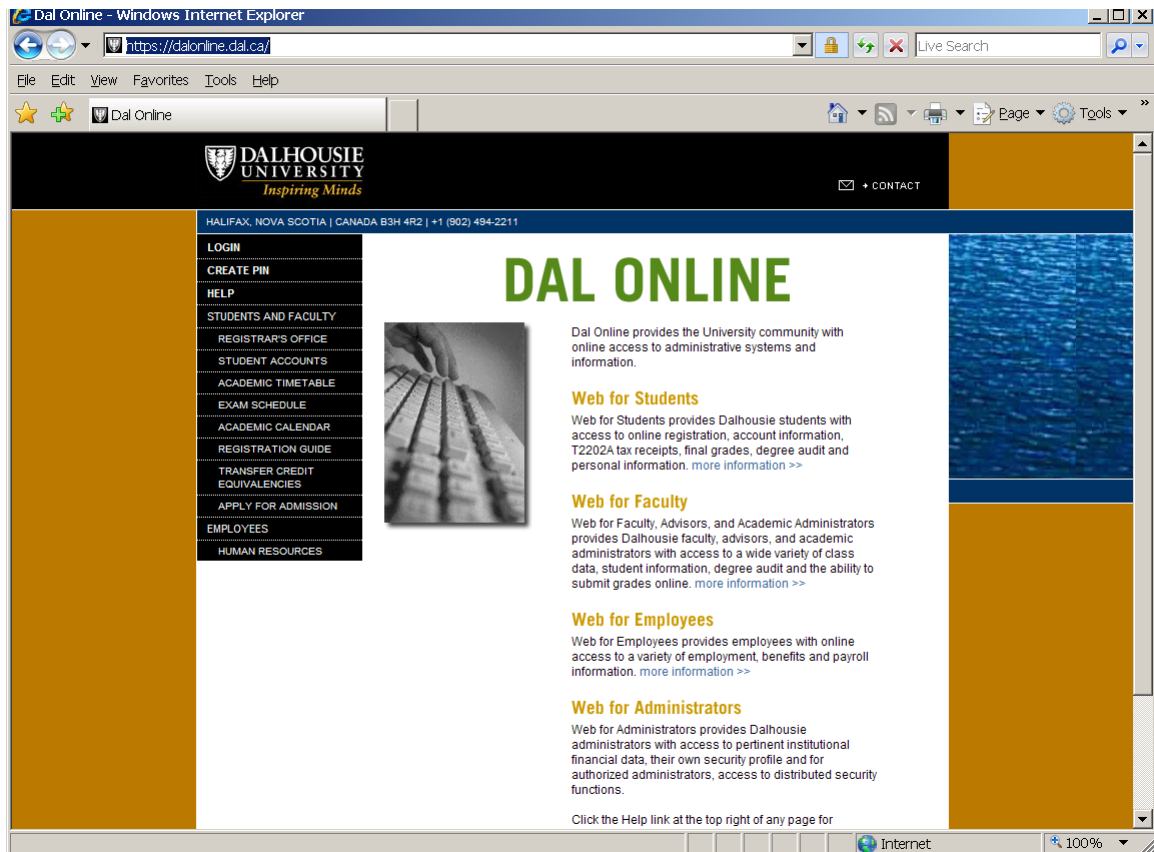
Currently, Financial Services is the only department distributing their monthly financial reports through this software. In future, other administrative departments may begin to use e~Print to distributed their reports.

### *What software do you need on your workstation to get started?*

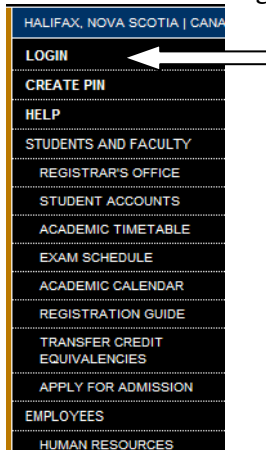
- Current Web Brower  
Microsoft Internet Explorer 4.0 or higher
- Adobe Reader  
Download the latest version from [www.adobe.com](http://www.adobe.com) if you currently do not have this program installed on your workstation.

*How do you log into e~Print?*

1. Open an internet browser
2. Go to Dal Online <https://dalonline.dal.ca/>. Suggestion: the end user should bookmark this URL for future access.



3. Click on Login



4. Enter your Dalhousie ID and PIN and click "Login".

The screenshot shows a Windows Internet Explorer browser window titled "Dalhousie Online: User Login". The address bar displays the URL "https://dalonline.dal.ca/PROD/twbkwbis.P\_WWWLogin". The page features the Dalhousie University logo and the text "DAL ONLINE" in a large, bold font. Below this, there is a "User Login" section with instructions: "Please enter your Dalhousie ID (B00xxxxx) and your Personal Identification Number (PIN), then click Login. When you are finished, please Exit and close your browser to protect your privacy." There are links for "Don't have a PIN?" and "Forgotten your PIN?". Below the instructions are input fields for "Dalhousie ID:" and "PIN:", followed by "Login" and "Forgot PIN?" buttons. A status bar at the bottom indicates "RELEASE: 7.3".

Dalhousie Online: User Login - Windows Internet Explorer

https://dalonline.dal.ca/PROD/twbkwbis.P\_WWWLogin

File Edit View Favorites Tools Help

Dalhousie Online: User Login

**DALHOUSIE UNIVERSITY**  
Inspiring Minds

**DAL ONLINE**

HELP | EXIT

### User Login

Please enter your Dalhousie ID (B00xxxxx) and your Personal Identification Number (PIN), then click Login. When you are finished, please Exit and close your browser to protect your privacy.

**Don't have a PIN?** First-time students, faculty, and staff can create their initial PIN using the [Create PIN form](#).

**Forgotten your PIN?** Enter your Dalhousie ID and then click the "Forgot PIN?" button.

Dalhousie ID:

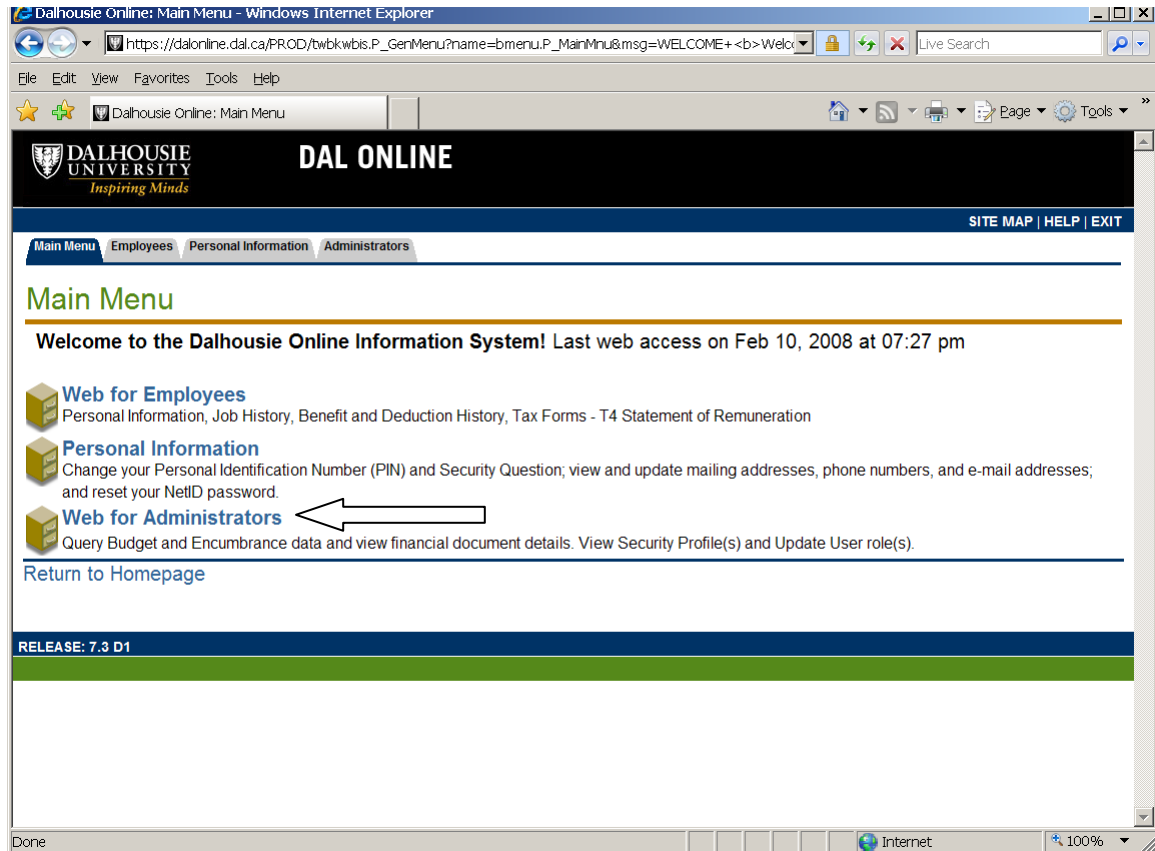
PIN:

Login Forgot PIN?

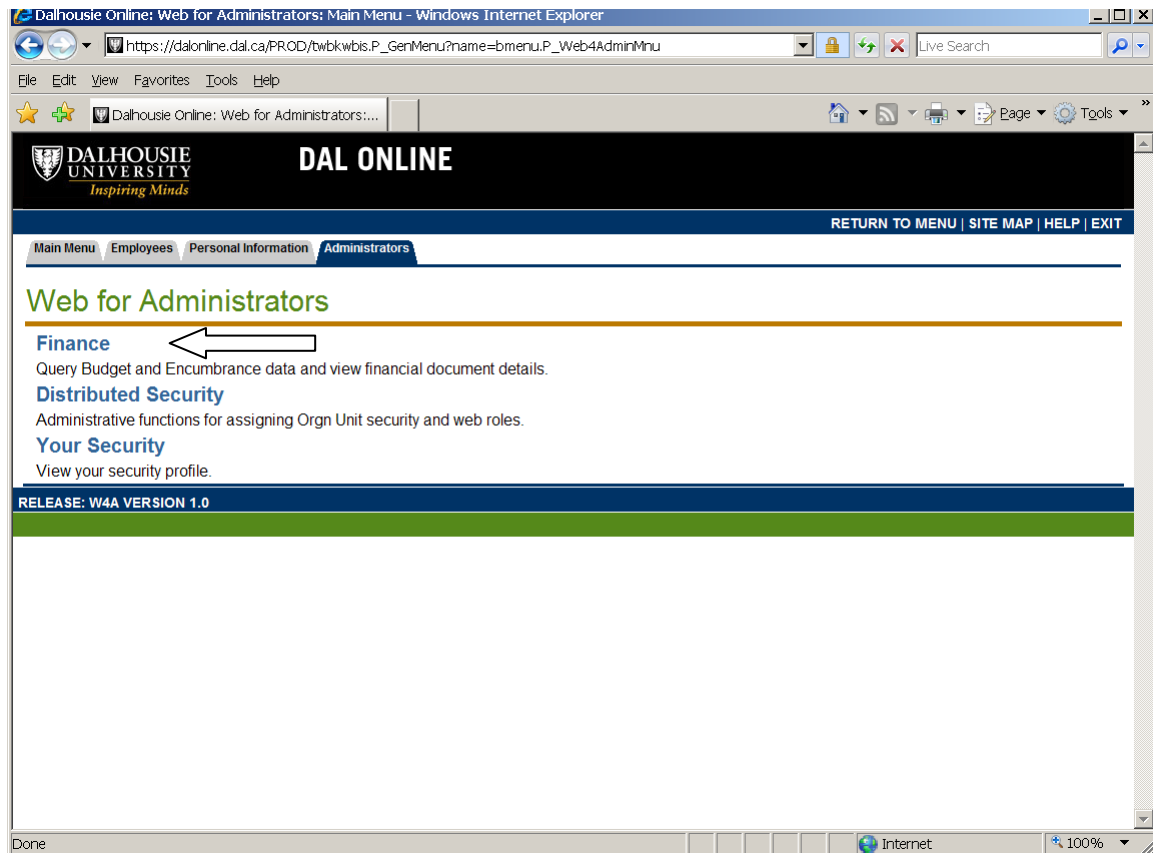
RELEASE: 7.3

Internet 100%

5. On the Main Menu, click on Web for Administrators.



6. Click on Finance



7. Click on ePrint Repository.

Finance Self-Serve - Windows Internet Explorer

https://dalonline.dal.ca/PROD/twbkwbis.P\_GenMenu?name=bmenu.P\_Web4AdminFSSMnu

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**DAL ONLINE**

WEB FOR ADMINISTRATORS | SITE MAP | HELP | EXIT

Main Menu | Employees | Personal Information | Administrators

## Finance Self-Serve

**Budget Queries**  
View all financial information by fund/organization and account.

**Encumbrance Query**  
View purchase order details by fund/organization and account.

**Salary Encumbrance Query**  
View salary encumbrance details by fund/organization and employee. *For Research only (4xxxx-5xxxx)*

**View Document**  
View document details by document number.

**e~Print Repository** ←

**Finance Home Page**

**Email Financial Services**

Budget Queries | Encumbrance Query | Requisition | View Document | Finance Home page | Email Financial Services

RELEASE: 7.2

Done Internet 100%

8. e~Print will then open.

e~Print

**Select Report from Repository Banner Finance PROD**

Banner Finance PROD Repository

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[Repository Message is Available](#)

**Banner Finance PROD**

Report	Description	Latest Date
FWRADRE	Revenue & Expense by Orgn-Capital, Ann. Givings & Endowment	Wed May 02, 2007 09:55am
FWRODAD	Transaction Detail-Operating, Capital, Ann. Givings & Endow.	Wed May 02, 2007 09:52am
FWRODPI	Transaction Detail - Research & Special Purpose	Wed May 02, 2007 09:52am
FWROFRS	Revenue & Expense - Senior Administrator Summary - Operating	Wed May 02, 2007 09:54am
FWROFRU	Revenue & Expense by Orgn - Operating	Wed May 02, 2007 09:53am
FWRPIRE	Revenue & Expense by Orgn - Research & Special Purpose	Wed May 02, 2007 09:55am
FWRUNST	Unit Status Report - Research, Special Purpose & Endowment	Wed May 02, 2007 09:56am
PWRHFRB	Payroll Hours & Fringe Benefits	Mon May 14, 2007 10:29am

### *What are Repository Messages?*

These are messages that Finance has set up to notify you of important messages related to your monthly reports.

Click on the blue text “Repository Message Available”.



A separate window will open to display the message. Once you have read the message, click on the X in the top right-hand corner of the message box. This will close the screen. If the message box does not open, it may be because you have “Popup Blocker” on under your Internet Tools.

The screenshot shows the Banner Finance PROD Repository web interface. A message box is open in the center, displaying the text: "April's monthly financial reports are now available in E~Print." The message box has a title bar with the URL "https://kil-ept-1.ucis.dal.ca/cgi-bin/getme...".

The background interface includes a header with the "ePrint" logo, the title "Select Report from Repository Banner Finance PROD", and the Dalhousie University logo. Below the header, there is a table of reports with columns for "Report", "Description", and "Latest Date".

Report	Description	Latest Date
PDF TEXT FWRADRE	Revenue & Expense	Wed May 02, 2007 09:55am
PDF TEXT FWRODAD	Transaction Data	Wed May 02, 2007 09:52am
PDF TEXT FWRODPI	Transaction Data	Wed May 02, 2007 09:52am
PDF TEXT FWROFRS	Revenue & Expense	Wed May 02, 2007 09:54am
PDF TEXT FWROFRU	Revenue & Expense	Wed May 02, 2007 09:53am
PDF TEXT FWRPIRE	Revenue & Expense	Wed May 02, 2007 09:55am
PDF TEXT FWRUNST	Unit Status Report - Research, Special Purpose & Endowment	Wed May 02, 2007 09:56am
PDF TEXT PWRHFRB	Payroll Hours & Fringe Benefits	Mon May 14, 2007 10:29am

*Icons in e~Print and what do they mean:*



Retrieve a PDF file to view in Adobe Reader



Download the TXT version of a report



“Drill down” for detail (See Report List)



Use a page key to pick pages (Search Report)




To perform the above functions, click once on the icon.




## Reports

When you first log into e~Print, you will be provided with a list of all the e~Print reports that are in the selected repository. This screen will display the most recently saved version of the reports. Depending on your security level, all or a few of these reports will be available to you for viewing.

From this screen you can do the following:


1. View the latest report to be saved to e~Print - 
2. Save the latest report as a .txt extension which then be opened in excel or view the report in PFE format - 
3. Drill-down to look at previous reports that have been saved in e~Print - 




**Select Report from Repository Banner Finance PROD**  
 About e~Print | FAQ

























Banner Finance PROD Repository  
 lrt

Help | Logout




 [Repository Message is Available](#)

**Banner Finance PROD**

	Report	Description	Latest Date
  	FWRADRE	Revenue & Expense by Orgn-Capital, Ann. Givings & Endowment	Wed May 02, 2007 09:55am
  	FWRODAD	Transaction Detail-Operating, Capital, Ann. Givings & Endow.	Wed May 02, 2007 09:52am
  	FWRODPI	Transaction Detail - Research & Special Purpose	Wed May 02, 2007 09:52am
  	FWROFRS	Revenue & Expense - Senior Administrator Summary - Operating	Wed May 02, 2007 09:54am
  	FWROFRU	Revenue & Expense by Orgn - Operating	Wed May 02, 2007 09:53am
  	FWRPIRE	Revenue & Expense by Orgn - Research & Special Purpose	Wed May 02, 2007 09:55am
  	FWRUNST	Unit Status Report - Research, Special Purpose & Endowment	Wed May 02, 2007 09:56am
  	PWRHFRB	Payroll Hours & Fringe Benefits	Mon May 14, 2007 10:29am


E~Print only allows the user access to the orgn codes that has been set up for them. If their orgn code does not appear on the report, you will receive the following message.



**No Pages**  
 About e~Print | FAQ

Banner Finance PROD Repository  
 lrt

No Help | Logout




**Banner Finance PROD**

There are no pages for you to view on this report.  
 If you think this is an error, contact your e~Print administrator. Otherwise, return to e~Print and select another report.

## Report List “Drilling Down” to Select a Report




When you “drill down” in a report, you will get a list of all the instances of this report that has been saved in e~Print. The order of the reports is with the most recent at the top of the list and the oldest report at the bottom.











**Report Detail: FWRODPI**  
About e~Print | FAQ


Banner Finance PROD Repository  
lrB  
Help | Logout



**Banner Finance PROD : FWRODPI**

	Title	Date
PDF TEXT 	Organization Detail Activity From 01-APR-2007 To 30-APR-2007	Wed May 02, 2007 09:52am
PDF TEXT 	Organization Detail Activity From 01-APR-2006 To 31-MAR-2007	Thu Apr 05, 2007 1:05pm
PDF TEXT 	Organization Detail Activity From 01-FEB-2007 To 28-FEB-2007	Thu Mar 01, 2007 11:51am
PDF TEXT 	Organization Detail Activity From 01-JAN-2007 To 31-JAN-2007	Thu Feb 01, 2007 09:35am
PDF TEXT 	Organization Detail Activity From 01-DEC-2006 To 31-DEC-2006	Thu Jan 04, 2007 09:27am
PDF TEXT 	Organization Detail Activity From 01-NOV-2006 To 30-NOV-2006	Fri Dec 01, 2006 09:35am
PDF TEXT 	Organization Detail Activity From 01-OCT-2006 To 31-OCT-2006	Wed Nov 01, 2006 2:45pm
PDF TEXT 	Organization Detail Activity From 01-APR-2006 To 30-SEP-2006	Mon Oct 02, 2006 10:37am

Organization Detail Activity From 01-APR-2007 To 30-APR-2007 - Wed May 02, 2007 09:52am ▼



## Search Report

### How to search for specific orgn?



There are three methods to search for organization codes in e~Print.

1. Manually picking one or multiple orgn codes.
2. Search for a specific orgn.
3. Search for a consecutive range.



By clicking on the within the report detail screen,

**Report Detail: FWRODPI**  
About e~Print | FAQ

Banner Finance PROD Repository  
lr8  
Help | Logout

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**Banner Finance PROD : FWRODPI**

	Title	Date
PDF TEXT	Organization Detail Activity From 01-APR-2007 To 30-APR-2007	Wed May 02, 2007 09:52am
PDF TEXT	Organization Detail Activity From 01-APR-2006 To 31-MAR-2007	Thu Apr 05, 2007 1:05pm
PDF TEXT	Organization Detail Activity From 01-FEB-2007 To 28-FEB-2007	Thu Mar 01, 2007 11:51am
PDF TEXT	Organization Detail Activity From 01-JAN-2007 To 31-JAN-2007	Thu Feb 01, 2007 09:35am
PDF TEXT	Organization Detail Activity From 01-DEC-2006 To 31-DEC-2006	Thu Jan 04, 2007 09:27am
PDF TEXT	Organization Detail Activity From 01-NOV-2006 To 30-NOV-2006	Fri Dec 01, 2006 09:35am
PDF TEXT	Organization Detail Activity From 01-OCT-2006 To 31-OCT-2006	Wed Nov 01, 2006 2:45pm
PDF TEXT	Organization Detail Activity From 01-APR-2006 To 30-SEP-2006	Mon Oct 02, 2006 10:37am

Organization Detail Activity From 01-APR-2007 To 30-APR-2007 - Wed May 02, 2007 09:52am

the following screen will appear.

Index: Account

Pick values manually

Pick Values Manually

GO

Provide a specific value

Search:

GO

Indicate a range of values

Range:  to

GO

In order to search, one of these three search options must be used to search for organization code(s).

1. Manually picking one or multiple orgn codes. The only orgn codes that will be available to you to pick from are the orgn codes that are set up under your security.

**Choose Orgn**

Banner Finance PROD Repository  
In

About e~Print | FAQ Help | Logout

**Banner Finance PROD : FWRODPI : Pick Pages : Orgn**

<input type="checkbox"/> 4	<input type="checkbox"/> 4	<input type="checkbox"/> 4	<input type="checkbox"/> 4
<input type="checkbox"/> 4	<input checked="" type="checkbox"/> 4	<input type="checkbox"/> 4	<input checked="" type="checkbox"/> 4
<input type="checkbox"/> 4	<input checked="" type="checkbox"/> 4	<input type="checkbox"/> 4	<input type="checkbox"/> 4
<input type="checkbox"/> 4	<input type="checkbox"/> 4	<input type="checkbox"/> 4	<input type="checkbox"/> 4
<input checked="" type="checkbox"/> 4	<input type="checkbox"/> 4	<input checked="" type="checkbox"/> 4	<input type="checkbox"/> 4
<input type="checkbox"/> 4	<input type="checkbox"/> 4	<input type="checkbox"/> 4	<input type="checkbox"/> 4
<input type="checkbox"/> 4	<input type="checkbox"/> 4	<input type="checkbox"/> 4	<input type="checkbox"/> 4

GO Next

Get the Report

- Place a check mark in the box beside the orgn code that you wish to view.
- At least one check mark must be placed in a box in order to search.
- A Next button is only available if the number of orgns that you have access to is greater than what you see on screen. If this is the case, a box with a GO button is available for you to enter the orgn code and go directly to that check box.
- Once you have all the orgns picked that you want to view, click on “Get the Report”.
- The screen below will appear to confirm these are the values that have been chosen.

**Selected Orgn Values**

Banner Finance PROD Repository  
In

About e~Print | FAQ Help | Logout

**Banner Finance PROD : FWRODPI : Pick Pages : Orgn : Values**



"4"	"4"	"4"	"4"
"4"	"4"	"4"	"4"

PDF TEXT

- Click on the to pull up the report in Adobe or to download information into a TXT document.

2. Search for a specific orgn.

- Type in the orgn
- Click GO

	<b>Search FWRODPI (Thu Mar 01, 2007)</b> <small>About e~Print   FAQ</small>	<small>Banner Finance PROD Repository lr</small> <small>Help   Logout</small>	
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**Banner Finance PROD : FWRODPI : Pick Pages**


<b>Page Key: Orgn</b>	
Pick Values Manually <input type="button" value="GO"/>	Search: <input type="text" value="4XXXX"/> <input type="button" value="GO"/>
Range: <input type="text"/> to <input type="text"/> <input type="button" value="GO"/>	

- The screen below will appear to confirm these are the values that have been chosen.

	<b>Selected Orgn Values</b> <small>About e~Print   FAQ</small>	<small>Banner Finance PROD Repository lr</small> <small>Help   Logout</small>	
---	---	--	---


**Banner Finance PROD : FWRODPI : Pick Pages : Orgn : Values**

"4XXXX "			
 			

- Click on the  to pull up the report in Adobe or  to download information into a TXT document.


### 3. Search for a consecutive range.

- Enter a range of orgn codes in the from/to fields.
- Click on GO



**Search FWRODPI (Thu Mar 01, 2007)**  
About e~Print | FAQ

Banner Finance PROD Repository  
lr870030  
Help | Logout



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**Banner Finance PROD : FWRODPI : Pick Pages**

**Page Key: Orgn**

Pick Values Manually


GO

Search:

GO


Range:  to  GO

- The screen below will appear to confirm these are the values that have been chosen.



**Selected Orgn Values**  
About e~Print | FAQ

Banner Finance PROD Repository  
lr  
Help | Logout







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**Banner Finance PROD : FWRODPI : Pick Pages : Orgn : Values**

"4"	"4"	"4"	"4"
"4"	"4"	"4"	"4"
"4"	"4"	"4"	"4"
"4"	"4"	"4"	"4"
"4"	"4"	"4"	"4"
"4"	"4"	"4"	"4"
"4"	"4"	"4"	"4"

Next

- Click on the  to pull up the report in Adobe or  to download information into a TXT document.

## e~Print's Navigation Bar

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



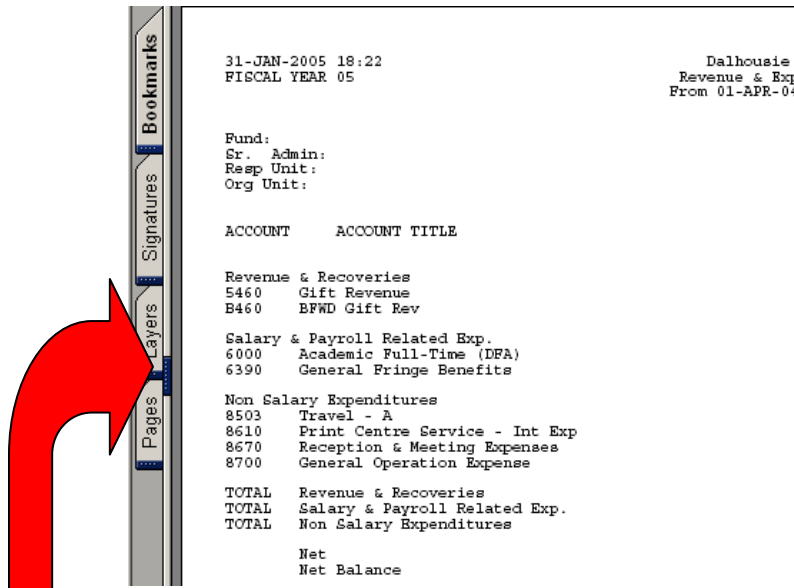
To move around e~Print, the user should use the navigation bar in e~Print and not the browser navigation bar (eg. Back button)

In the above example,

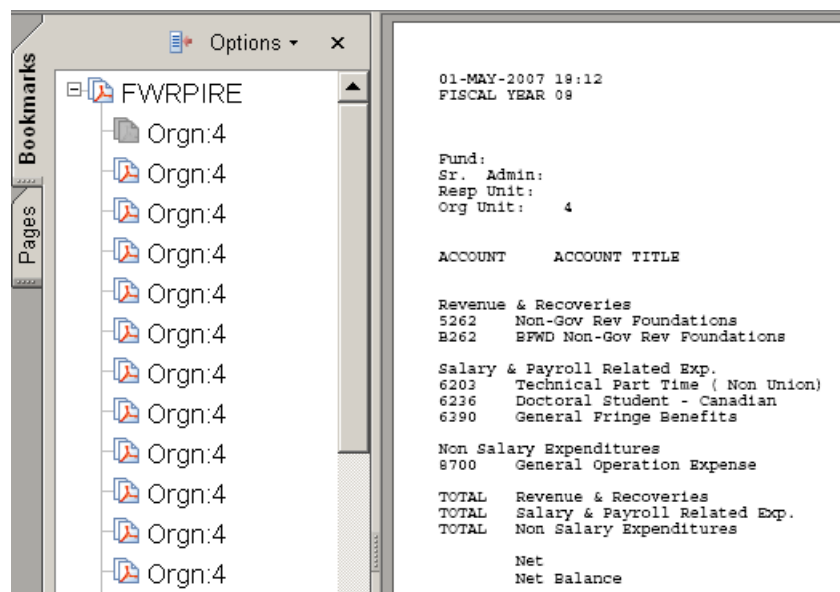
- If you wanted to go to the list of all the reports available in the repository, click on Banner Finance DEVL.
- If you wanted to go to the list of all FWRODAD reports available in the repository, click on FWRODAD.

## Viewing and Printing a Report

- When the PDF report is opened, the Adobe Reader's navigation pane will be hidden, and the report will be displayed in full screen-width format.



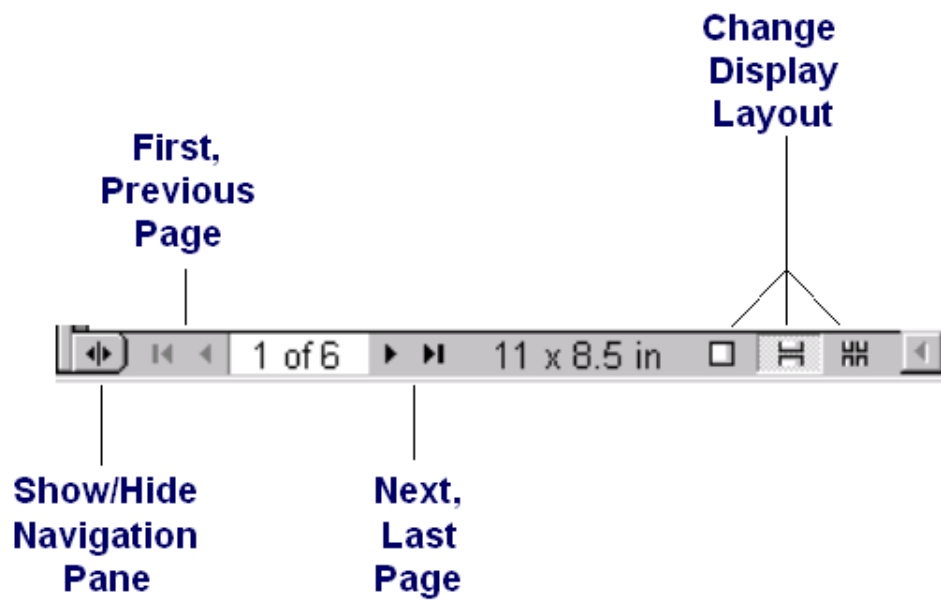
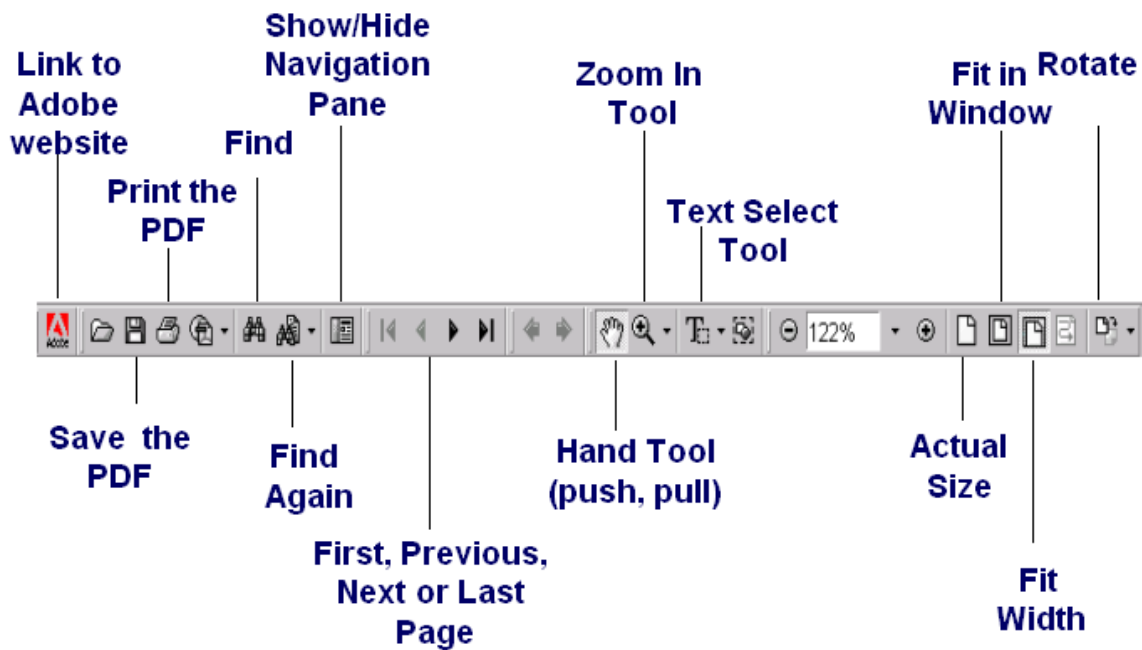
- Move your cursor over the small blue vertical space between the report and the tabs (see where the red arrow is pointing).
- The cursor should change to be two vertical lines with an arrow pointing horizontal outward from each line.
- When you see this change in the cursor, left click and drag the box to the right.
- This will open up your bookmarks screen.



- From this list, you can click on the orgn and go directly to the report.

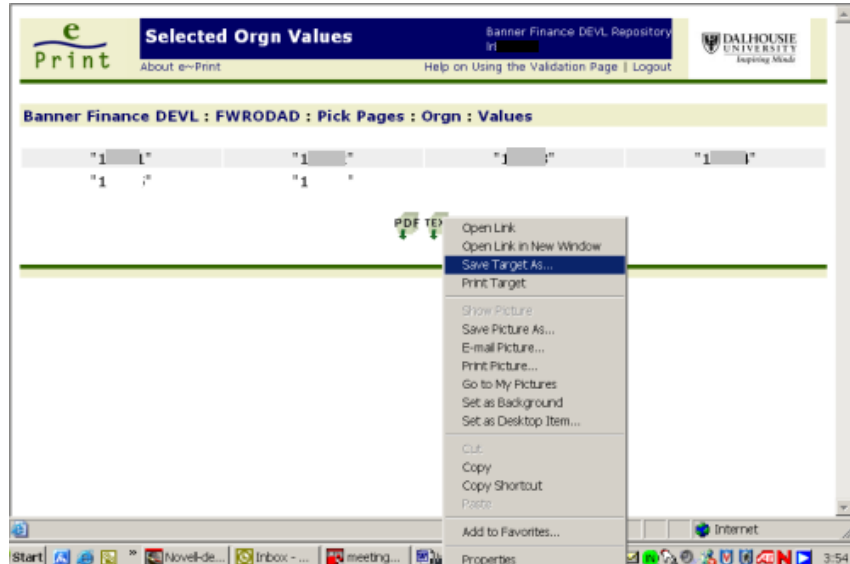


## Using Adobe Reader's Tools

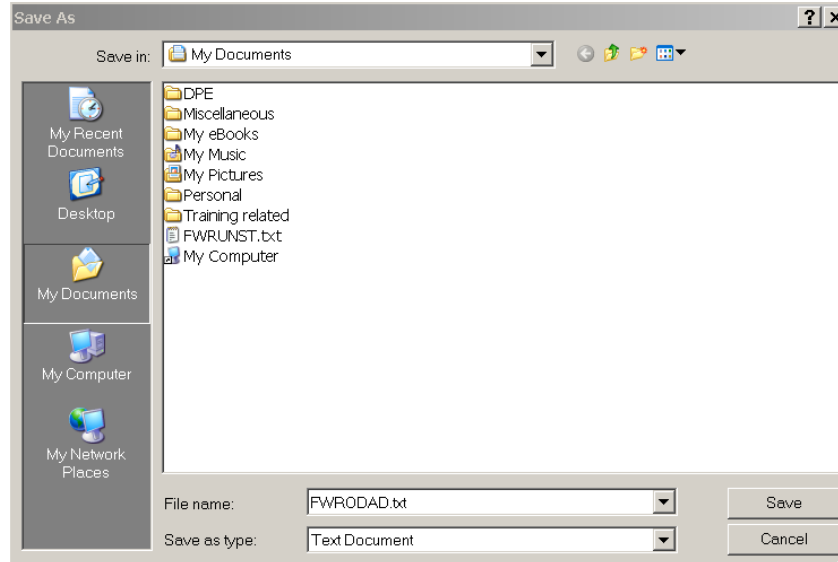


*How do I download/open TXT file in PFE?*

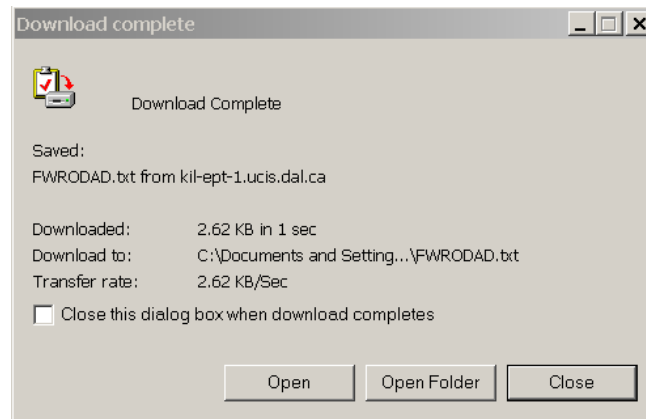
1. Right click on the TEXT icon
2. Select "Save Target As..."



3. Save the file to the correct path. The file will be saved with a .txt extension.



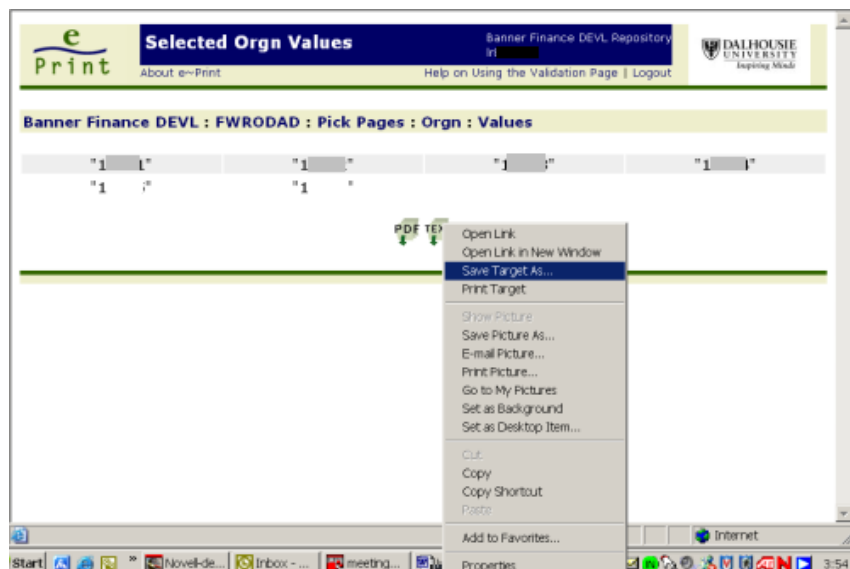
4. Click Close once the file has been downloaded




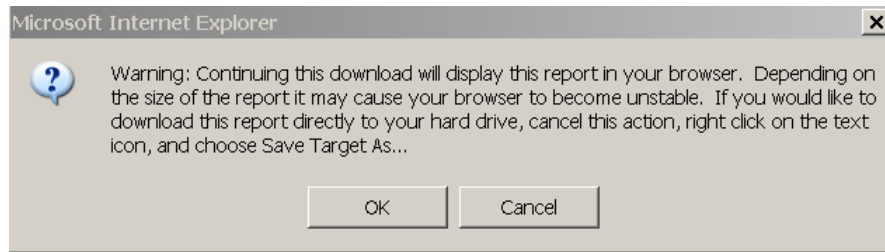
5. Open PFE
6. Open the file you just saved.

*How do I download TXT to excel?*

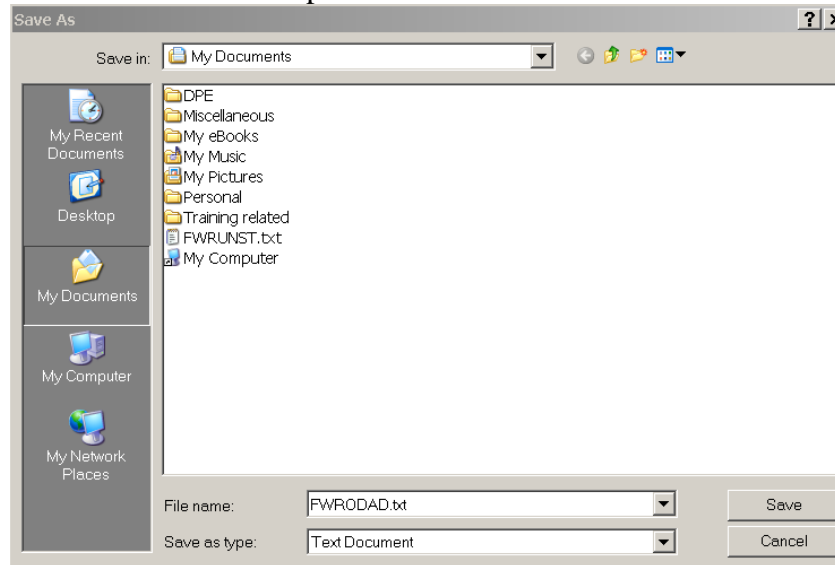
7. Right click on the TEXT icon
8. Select "Save Target As..."



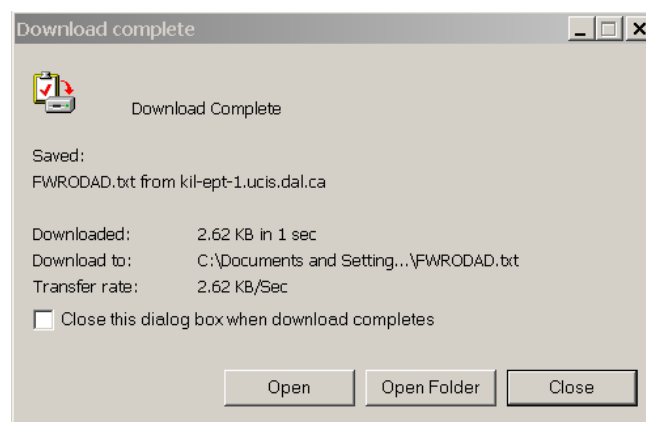
9. If you get the following message, you left clicked on the text icon . You need to right click to get the Save Target As... option.



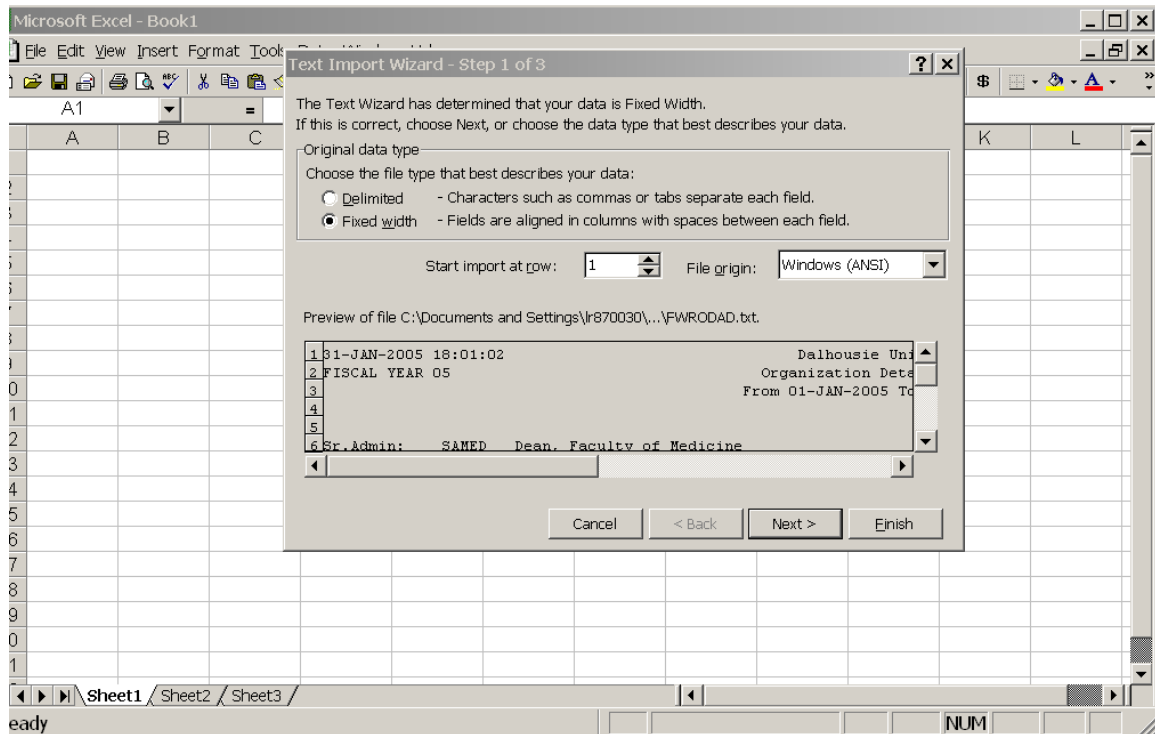
10. Save the file to the correct path. The file will be saved with a .txt extension.



11. Click Close once the file has been downloaded



12. Open Excel  
 13. Open the file you just saved. Remember to change the Files of type to All Files (\*.\*), otherwise you will not see files with the .txt extension.  
 14. The text import wizard will appear. It will be set for "Fixed width".



15. Click Finish. The information in the report will automatically populate excel.
16. You can now save the file with an .xls extension and use the information in excel.

*Is there any help on-line?*

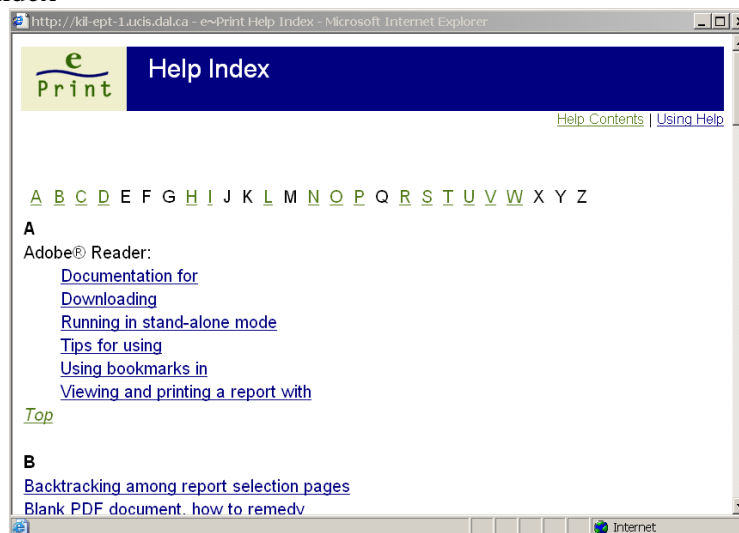
Yes. At the top of the screen, you will see Help on the Repository List.



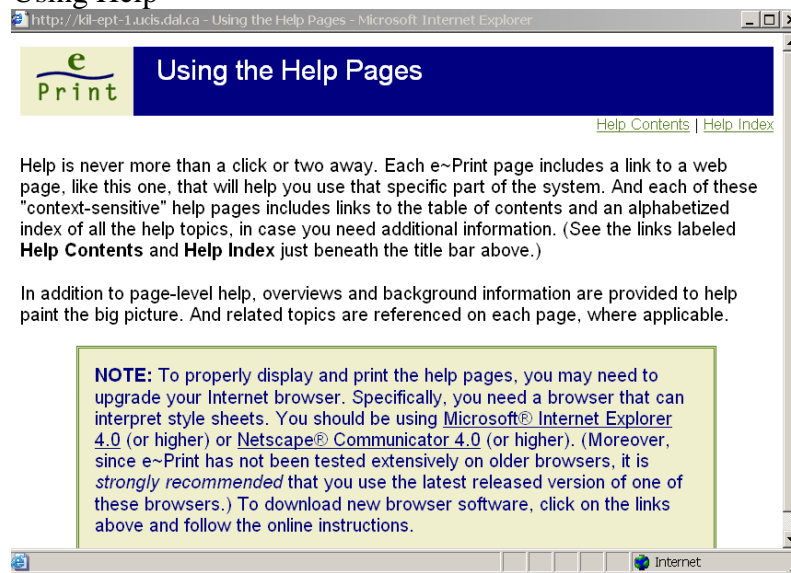
- Click on “Help on the Repository List.”
- A second window will open up with three types of help
  - Help Contents



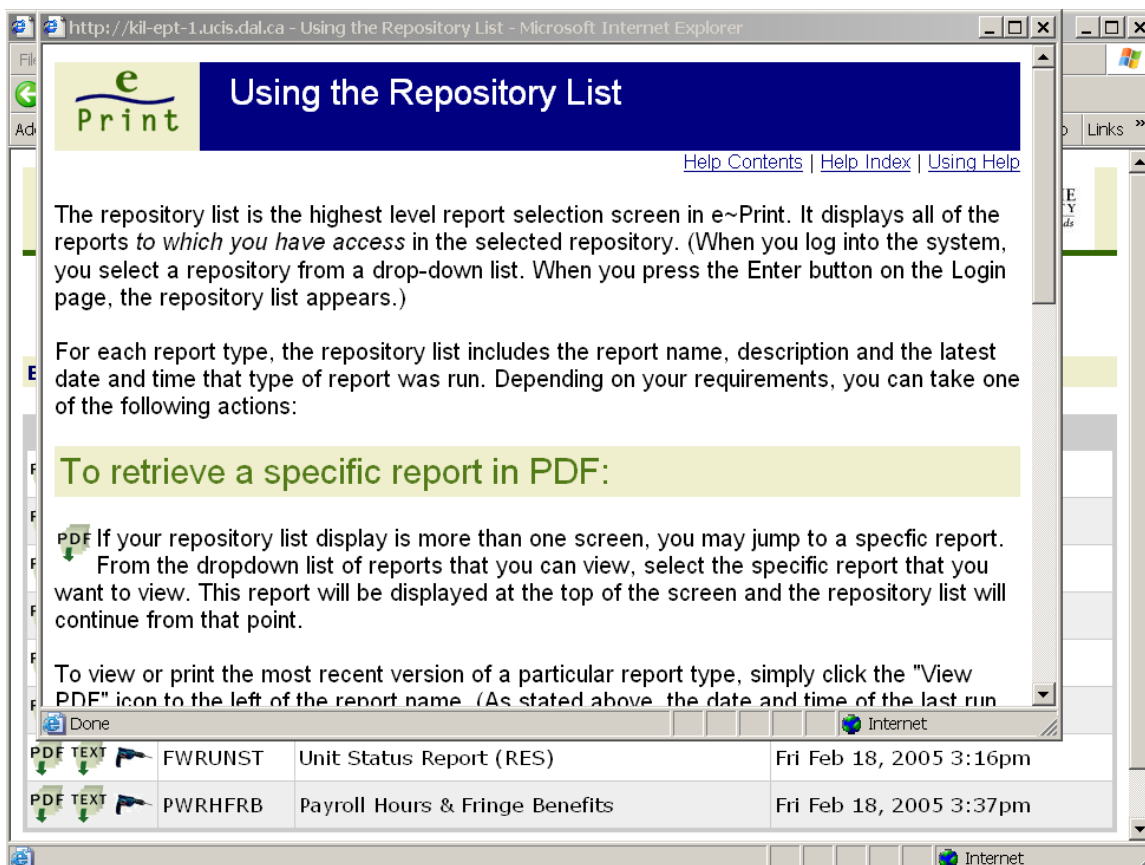
- Help Index



## ○ Using Help



Depending on the screen you are on when you click on Help, the help file that opens will explain the screen you are on.



### *How do I logout of e~Print?*



- Click the Logout link in the top, right-hand corner of any page.
- Log out if your browser will remain open.
- Automatically logout when you close the browser.