## 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

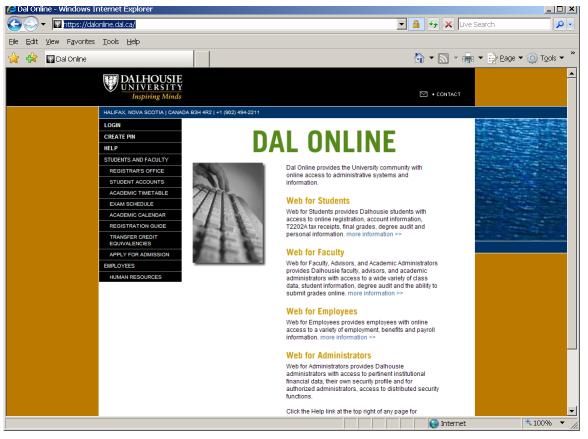
Microsoft Internet Explorer 4.0 or higher

Adobe Reader

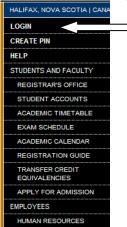
Download the latest version from <u>www.adobe.com</u> if you currently do not have this program installed on your workstation.

### How do you log into e~Print?

- 1. Open an internet browser
- 2. Go to Dal Online <u>https://dalonline.dal.ca/</u>. 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".

🕼 Dalhousie Online: User Login - Windows Internet Explorer		<u> </u>
COO V Mhttps://dalonline.dal.ca/PROD/twbk.wbis.P_WWWLogin	🕶 🔒 🔸 🗙 Live Search	<b>P</b> •
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😭 🎲 🔟 Dalhousie Online: User Login	🏠 🕶 🔝 👻 🖶 👻 Eage 🕶 🍥	T <u>o</u> ols ▼ "
DALHOUSIE UNIVERSITY Inspiring Minds		<u> </u>
	HELP	EXIT
User Login		
Please enter your Dalhousie ID (B00xxxxx) and your Personal Identification Number (PIN), then click Login. your browser to protect your privacy.	When you are finished, please Exit and c	lose
Don't have a PIN? First-time students, faculty, and staff can create their initial PIN using the Create PIN for	n.	
Forgotten your PIN? Enter your Dalhousie ID and then click the "Forgot PIN?" button.		
Dalhousie ID:		
PIN:		
Login Forgot PIN?		
RELEASE: 7.3		
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5. On the Main Menu, click on Web for Administrators.

🖉 Dalhousie Online: Main Menu - Windows Internet Explorer
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😭 🛧 🔟 Dalhousie Online: Main Menu
DALHOUSIE UNIVERSITY Inspiring Minds
SITE MAP   HELP   EXIT
Main Menu Employees Personal Information Administrators
Main Menu
Welcome to the Dalhousie Online Information System! Last web access on Feb 10, 2008 at 07:27 pm
<ul> <li>Web for Employees Personal Information, Job History, Benefit and Deduction History, Tax Forms - T4 Statement of Remuneration</li> <li>Personal Information Change your Personal Identification Number (PIN) and Security Question; view and update mailing addresses, phone numbers, and e-mail addresses; and reset your NetID password.</li> <li>Web for Administrators Query Budget and Encumbrance data and view financial document details. View Security Profile(s) and Update User role(s).</li> <li>Return to Homepage</li> </ul>
RELEASE: 7.3 D1
Done

6. Click on Finance

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DALHOUSIE DAL ONLINE				*
		RETURN TO MENU   SITE MAP	HELP   EXIT	
Main Menu Employees Personal Information Administrators				
Web for Administrators				
Finance Query Budget and Encumbrance data and view financial document details. Distributed Security Administrative functions for assigning Orgn Unit security and web roles.				
Your Security				
View your security profile.				
RELEASE: W4A VERSION 1.0				
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7. Click on ePrint Repository.

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Eile Edit View Favorites Tools Help		
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v	NEB 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 p	age Email Financial Services	
RELEASE: 7.2		-
J Done	Internet	₹ 100% ▼

**8.** e~Print will then open.

Print	PRO		ROD
		Repository Message is Available	
Banner Fina	nce 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?

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

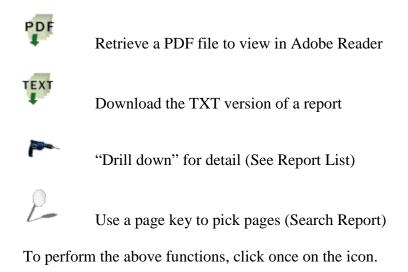
Click on the blue text "Repository Message Available".



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.

Print	PRO About e	e∼Print   FAQ	https://kil-ept-1.ucis.dal.ca/cgi-bin/getme		Help	)   Logout	Inspiring Minds
			April's monthly financial reports are now available in E~Print.				
anner Fina	ance PROD						
	<u>Report</u>	Description				Latest Da	<u>te</u>
DF TEXT	FWRADRE	Revenue & Exper		1	t	Wed May 0	2, 2007 09:55am
	FWRODAD	Transaction Deta				Wed May 0	2, 2007 09:52am
	FWRODPI	Transaction Deta				Wed May 0	2, 2007 09:52am
	FWROFRS	Revenue & Exper		6	g	Wed May 0	2, 2007 09:54am
DF TEXT	FWROFRU	Revenue & Exper				Wed May 0	2, 2007 09:53am
	FWRPIRE	Revenue & Exper	🗿 Done 🛛 🔒 💼 Internet	-		Wed May 0	2, 2007 09:55am
DF TEXT	FWRUNST	Unit Status Repo	rt - Research, Special Purpose & Endown	nent		Wed May 0	2, 2007 09:56am
DF TEXT	PWRHFRB	Payroll Hours & F	ringe Benefits			Mon May 14	4, 2007 10:29am

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



#### 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  $\P$
- 2. Save the latest report as a .txt extension which then be opened in excel or view the

PDF

report in PFE format -

**Banner Finance PROD** 

3. Drill-down to look at previous reports that have been saved in e~Print -

 
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 Select Report from Repository Banner Finance Banner Finance PROD Repository Ir
 Banner Finance PROD Repository Ir
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 Banner Finance PROD Repository
 Banner Finance PROD Repository
 Banner Finance PROD Repository
 Banner Finance PROD

### Repository Message is Available

	Report	Description	Latest Date
PDF TEXT	FWRADRE	Revenue & Expense by Orgn-Capital, Ann. Givings & Endowment	Wed May 02, 2007 09:55am
PDF TEXT	FWRODAD	Transaction Detail-Operating, Capital, Ann. Givings & Endow.	Wed May 02, 2007 09:52am
PDF TEXT	FWRODPI	Transaction Detail - Research & Special Purpose	Wed May 02, 2007 09:52am
PDF TEXT	FWROFRS	Revenue & Expense - Senior Administrator Summary - Operating	Wed May 02, 2007 09:54am
PDF TEXT	FWROFRU	Revenue & Expense by Orgn - Operating	Wed May 02, 2007 09:53am
PDF TEXT	FWRPIRE	Revenue & Expense by Orgn - Research & Special Purpose	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

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.

Print	No Pages	Banner Finan Irŧ	ce PROD Repository	DALHOUSIE UNIVERSITY Inspiring Minds
Print	About e~Print   FAQ		No Help   Logout	inspiring Minds
Banner Finan	ice PROD			
	There	are no pages for you to view on this report.		
If you thin		e~Print administrator. Otherwise, return to		t another report.

## Report List "Drilling Down" to Select a Report

Para.

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	Banner Finance PROD Repository Ir8	DALHOUSIE UNIVERSITY
rint	About e~Print   FAQ	Help   Logout	Inspiring Minds
inner Fina	nce PROD : FWRODPI		
	Title	Date	
DE TEXT	Organization Detail Activity From 01-APR-2007 To 30-APR-2007	Wed May 02, 2	007 09:52am
DE TEXT	Organization Detail Activity From 01-APR-2006 To 31-MAR-2003	7 Thu Apr 05, 20	07 1:05pm
DE TEXT	Organization Detail Activity From 01-FEB-2007 To 28-FEB-2007	Thu Mar 01, 20	07 11:51am
DE TEXT	Organization Detail Activity From 01-JAN-2007 To 31-JAN-2007	Thu Feb 01, 20	07 09:35am
DE TEXT	Organization Detail Activity From 01-DEC-2006 To 31-DEC-2006	6 Thu Jan 04, 20	07 09:27am
DE TEXT	Organization Detail Activity From 01-NOV-2006 To 30-NOV-200	6 Fri Dec 01, 200	)6 09:35am
	Organization Detail Activity From 01-OCT-2006 To 31-OCT-2006	5 Wed Nov 01, 2	006 2:45pm
	Organization Detail Activity From 01-APR-2006 To 30-SEP-2006	5 Mon Oct 02, 20	06 10:37am

# 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.

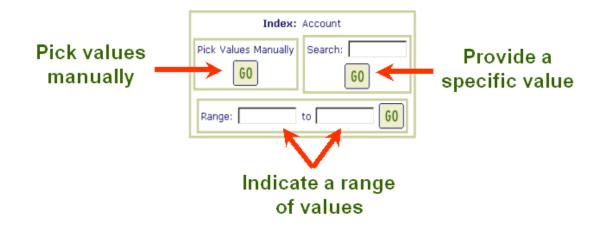
By clicking on the *b* within the report detail screen,

e	Report Detail: FWRODPI	Banner Finance PROD Repository Ir8	DALHOUSIE	
Print	About e~Print   FAQ	Help   Logout	Inspiring Minds	

Banner Finance PROD : FWRODPI

Title		Date
PDF TEXT 🥭 Organi	zation Detail Activity From 01-APR-2007 To 30-APR-2007	Wed May 02, 2007 09:52am
PDF TEXT 🖉 Organi	zation Detail Activity From 01-APR-2006 To 31-MAR-2007	Thu Apr 05, 2007 1:05pm
PDF TEXT 🥭 Organi	zation Detail Activity From 01-FEB-2007 To 28-FEB-2007	Thu Mar 01, 2007 11:51am
	zation Detail Activity From 01-JAN-2007 To 31-JAN-2007	Thu Feb 01, 2007 09:35am
PDF TEXT 🥭 Organi	zation Detail Activity From 01-DEC-2006 To 31-DEC-2006	Thu Jan 04, 2007 09:27am
PDF TEXT 🖉 Organi	zation Detail Activity From 01-NOV-2006 To 30-NOV-2006	Fri Dec 01, 2006 09:35am
PDF TEXT 🥭 Organi	zation Detail Activity From 01-OCT-2006 To 31-OCT-2006	Wed Nov 01, 2006 2:45pm
	zation 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, 20	007 09:52am 💌 Next

the following screen will appear.



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.

Print	Choose Orgn		Banner Finance PROD Repository	DALHOUSIE UNIVERSITY			
Print	About e~Print   FAQ		Help   Logout	Inspiring Minds			
Banner Finance	Banner Finance PROD : FWRODPI : Pick Pages : Orgn						
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		GO	Nex	t <sup>2</sup>			
		💭 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.

e	Selected Orgn Values	Banner Finance F In	
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Banner Finance	PROD : FWRODPI : Pick Pages : Orgn : \	/alues	
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	c on the <b>PPF</b> to pull up the rep	TEXT	
Click	c on the 🐺 to pull up the rep	ort in Adobe or 🔻	to download information
into a	a TXT document.		

- 2. Search for a specific orgn.
  - Type in the orgn
    Click GO

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Banner Finance	PROD : FWRODPI : P	_			
		Page Ke Pick Values Manually 60	Search: 4XXXX G0	]	
		Range:	to 60		

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

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Banner Finance	PROD : FWRODPI : Pick Pages : Orgn : Values		
"4XXX	χ "		
	PDF TEXT		
	to pull up the report in Add	obe or to downlo	oad information

- 3. Search for a consecutive range.
- > Enter a range of orgn codes in the from/to fields.
- ➢ Click on GO

Print	Search FWRODPI	(Thu Mar 01, 200	<b>)7)</b> Bann Ir870	er Finance PROD Repository 330 Help   Logout	DALHOUSIE UNIVERSITY Inspiring Minds
Banner Finance	PROD : FWRODPI : Pic	- Page Key	y: Orgn Search: 60		
	L				

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

e rint	Selected Orgn Values			B	anner Finance PF	OD Repository	DALHOUSIE	
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nner Financo	e PROD : FWROD	PI:Pick Pages:	Orgn : Value	es				
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"4	;"	"4 "		"4			4 ····································	
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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

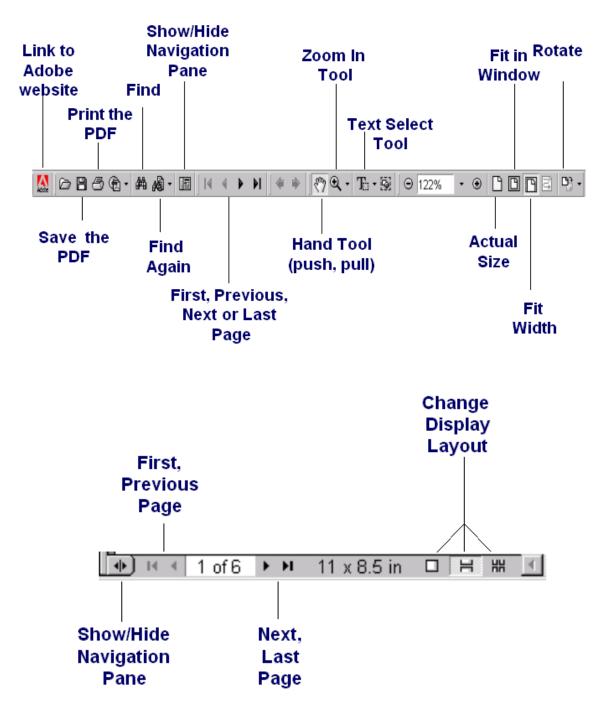
When the PDF report is opened, the Adobe Reader's navigation pane will be hidden, and the report will be displayed in full screen-width format.

Bookmarks	31-JAN-2005 18:22 FISCAL YEAR 05	Dalhousie Revenue & Exp. From 01-APR-04
	Fund: Sr. Admin:	
( m	Resp Unit:	
ture	Org Unit:	
Signatures	ACCOUNT ACCOUNT TITLE	
	Revenue & Recoveries	
a a a a a a a a a a a a a a a a a a a	5460 Gift Revenue B460 BFWD Gift Rev	
Laye	Salary & Payroll Related Exp. 6000 Academic Full-Time (DFA) 6390 General Fringe Benefits	
a la	Non Salary Expenditures	
ages	8503 Travel - A 8610 Print Centre Service - Int Exp	
L L L	8670 Reception & Meeting Expenses	
	8700 General Operation Expense	
	TOTAL Revenue & Recoveries	
	TOTAL Salary & Payroll Related Exp. TOTAL Non Salary Expenditures	
	Net	
	Net Balance	

- 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.

s	📴 Options 🗸	×	
Bookmarks	□ 📭 FWRPIRE		01-MAY-2007 18:12 FISCAL YEAR 08
ooki	- Orgn:4		
8	-🔁 Orgn:4		Fund: Sr. Admin: Resp Unit:
es	-🔁 Orgn:4		Org Unit: 4
Pages	-🔁 Orgn:4		ACCOUNT ACCOUNT TITLE
	-🔁 Orgn:4		Revenue & Recoveries
	-🔁 Orgn:4		5262 Non-Gov Rev Foundations B262 BFWD Non-Gov Rev Foundations
	-🔁 Orgn:4		Salary & Payroll Related Exp. 6203 Technical Part Time ( Non Union)
	-🔁 Orgn:4		6236 Doctoral Student - Canadian 6390 General Fringe Benefits
	-🔁 Orgn:4		Non Salary Expenditures 8700 General Operation Expense
	-🔁 Orgn:4		TOTAL Revenue & Recoveries
	-🔁 Orgn:4		TOTAL Salary & Payroll Related Exp. TOTAL Non Salary Expenditures
	- 🔁 Orgn:4	100	Net Net Balance

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?

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

e	Selected	Orgn Value	25	Banner Finance DEVL R	UNIVERSITY
Print	About e~Print			Help on Using the Validation Page	Logout Expiring Minds
apper Finar			k Pages :	Orgn : Values	
anner rina	ICE DEVE. IN	RODAD . PR	A rayes .	orgin. Values	
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				Go to My Pictures Set as Background	
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al (3) 🚳 💌	» Manual da	🔯 Inbox 🛛	meeting [5	Dia Properties	

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

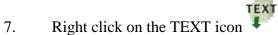
Save As					? ×
Save in:	🗎 My Documents		•	G 🤌 📂 🛄 🗸	
My Recent Documents Desktop My Documents My Computer My Network Places	DPE Miscellaneous My eBooks My Pusic Personal Training related FWRUNST.txt My Computer				
	File name:	FWRODAD.txt		•	Save
	Save as type:	Text Document		•	Cancel

Click Close once the file has been downloaded 4.

Download complete			_ 🗆 🗙
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Downloaded: 2.	52 KB in 1 sec		
Download to: C:	\Documents and Sett	ting\FWRODAD.txt	
Transfer rate: 2.	52 KB/Sec		
🔲 Close this dialog bo	x when download co	Impletes	
	Open	Open Folder	Close

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

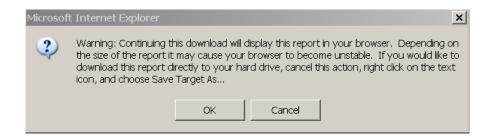
How do I download TXT to excel?



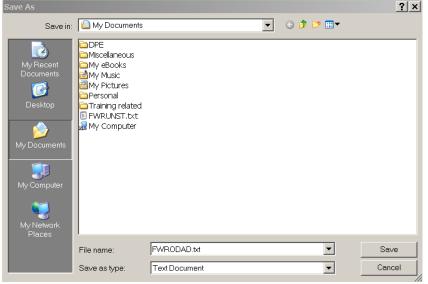
Select "Save Target As..." 8.

Banner Finance DEVL : FWRODAD : Pick Pages : Orgn : Values         "1 i" i" in New Window Open Link in Ne	e Print	Selected Orgn Values			Banner Finance DEVL In on Using the Validation Pa	DALHOUSIE UNIVERSITY Impiring Minds	
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Cipen Link in New Window Swe Target As Print Target Sive Picture As E-mail Picture As E-mail Picture Gio to My Pictures Set as Background Set as Desktop Item Club Copy Copy Shortout Picter	-	-			*1 ;"	"1 )"	
Add to Favorites			-	PDF TE	Open Link in New Window Save Target AS Print Target Show Potter Save Picture Save Picture Save Picture Save Picture So to My Pictures Set as Background Set as Desktop Item Cut Copy Copy Copy Shortout		-
art 🔝 🥌 🔯 * 💽 Novel-de 🔯 Inbox 📲 meeting 🖏 Properties 🛛 🖬 😡 🕲 🕲 🕲 🕼 🔍 🕅	1			100	Add to Favorites		3:

If you get the following message, you left clicked on the text icon You need to right click to get the S 9. 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".

Microsoft Excel - Book1	
Ble Edit View Insert Format Took Text Import Wizard - Step 1 of 3	_ & ×
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- Click Finish. The information in the report will automatically populate excel. You can now save the file with an .xls extension and use the information in 15.
- 16. excel.

## Is there any help on-line?

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

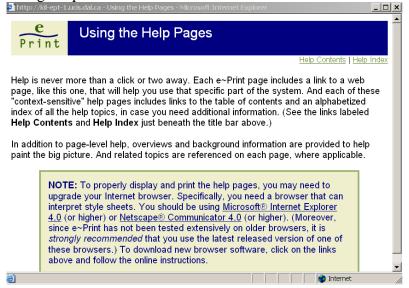
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Print	About e~Print   FAQ	Help   Logout	

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

o Help

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What You'll	Need to Get Started	
Logging Inte	o e~Print	
Selecting a	Report:	
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Using the	e Repository List	
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#### o 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.

Ø	🎒 http://kil-ept-1.ucis.dal.ca	- Using the Repository List - Microsoft Internet Explorer					
Fil C Ad	Usi	ng the Repository List	▲ N > Links ≫				
	<u>Help Contents   Help Index   Using Help</u> The repository list is the highest level report selection screen in e~Print. It displays all of the reports <i>to which you have access</i> in the selected repository. (When you log into the system, you select a repository from a drop-down list. When you press the Enter button on the Login page, the repository list appears.)						
E	<ul> <li>For each report type, the repository list includes the report name, description and the latest date and time that type of report was run. Depending on your requirements, you can take one of the following actions:</li> <li>To retrieve a specific report in PDF:</li> </ul>						
	PDF If your repository list display is more than one screen, you may jump to a specific report. From the dropdown list of reports that you can view, select the specific report that you want to view. This report will be displayed at the top of the screen and the repository list will continue from that point. To view or print the most recent version of a particular report type, simply click the "View PDF" icon to the left of the report name. (As stated above, the date and time of the last run.						
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	FWRUNST	Unit Status Report (RES)	Fri Feb 18, 2005 3:16pm				
	POF TEXT PWRHFRB	Payroll Hours & Fringe Benefits	Fri Feb 18, 2005 3:37pm				
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## 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.