



UNIVERSITY HOSPITAL
Newark, New Jersey

Welcome



**Accessing Your
Banner ePrint Reports**



Introduction

- **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

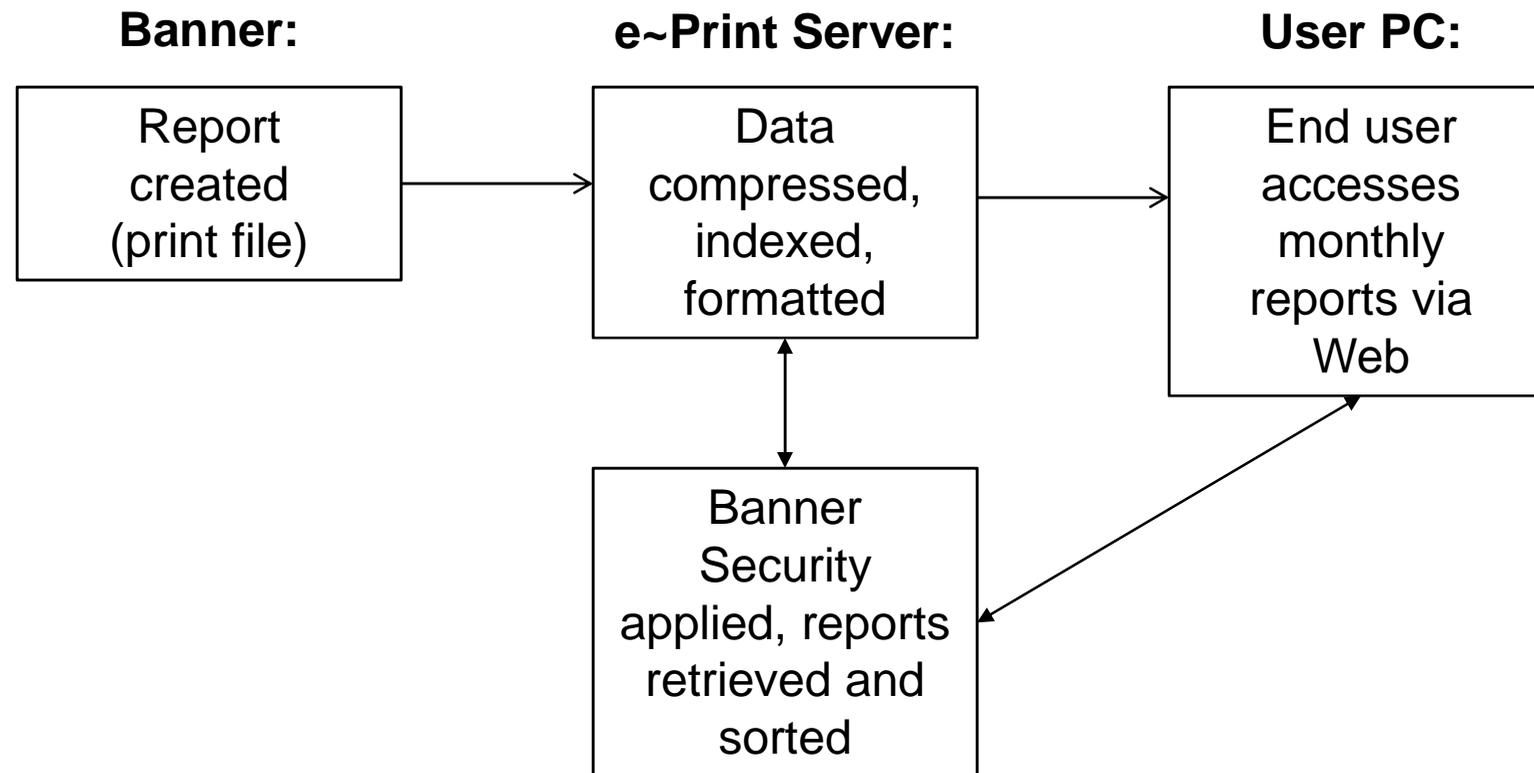


Agenda

- 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



System Overview





What You'll Need to Get Started

- Banner Finance System Account
 - If you don't already have a Banner UserID, see "Getting a Banner UserID" located on the Rutgers OIT Banner web site.
 - You should have Finance Query or Departmental Administrator role to take utmost advantage of reports
- Current Web Browser
 - Microsoft® Internet Explorer 8 or higher
 - Firefox, Chrome or Safari (all self-updating)
- 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



Accessing e~Print

- To access your e-Print reports, type into the Address box:
`https://e-print.umdnj.edu`
 - Please note it's https, not just http!
- Make sure you have selected the correct repository
- You can also change the repository after you log in:

Login

About Banner ePrint | FAQ

User ID:

Password:

Repository:

Enter

Current Repository is: UH PROD 1 Finance

Change to:

Go

- PROD 1 Finance
- PROD 1 HR/PR Reports
- PROD 2 Finance
- PROD 3 Finance-PY Rpts
- PROD Human Resources
- PROD 1 EPAF
- PROD 1 UnivHosp
- Financial Aid Prod 1
- PROD 1 Student
- UH PROD 2 Finance
- UH PROD 1 HR/PR Reports



Remember to Use e~Print Help!



- Every page (even login page) has a link to context-sensitive Help, Frequently Asked Questions (FAQs) and Logout.
- Every Help page has a link to:
 - Help Contents Page
 - Alphabetized Index
 - Using Help





Logging Into e~Print

- Type in your *Banner* User ID and password.
- Make sure to select the correct repository.
- Click Enter.

Banner ePrint Login dambrol

About Banner ePrint | FAQ Change Repository | Help | Logout

! dambrol has been logged off

User ID: dambrol
Password: ●●●●●●●●
Repository: UH PROD 1 Finance

Enter

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Using the Repository List

- **The repository list displays all of the reports to which you have access in the selected repository.**
- **For each report type, the repository list includes:**
 - Report name
 - Report description
 - Latest date and time the report was run.



Using the Repository List (cont)

	Report	Description	Latest Date
	FGRACCI	Account Index Report	Thu Nov 13, 2014 10:48am
	FGRACTH	Account Hierarchy Report	Thu Nov 13, 2014 10:48am
	FGRFNDH	Fund Hierarchy Report	Thu Nov 13, 2014 10:49am
	FGRLOCH	Location Hierarchy Report	Thu Nov 13, 2014 10:49am
	FGRODTA	Organization Detail Activity	Thu Nov 13, 2014 11:38am
	FGRORGH	Organization Hierarchy Report	Thu Nov 13, 2014 10:50am
	FGRPRGH	Program Hierarchy Report	Thu Nov 13, 2014 10:50am
	FYR112R	Budget Status Report	Thu Nov 13, 2014 12:51pm

This shows you the last time this report was run

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

Click here to see the next page of reports



Using the e-Print Icons

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 CSV (comma separated values) version of a report. Excel will directly open CSV files (not all reports will have this option)



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



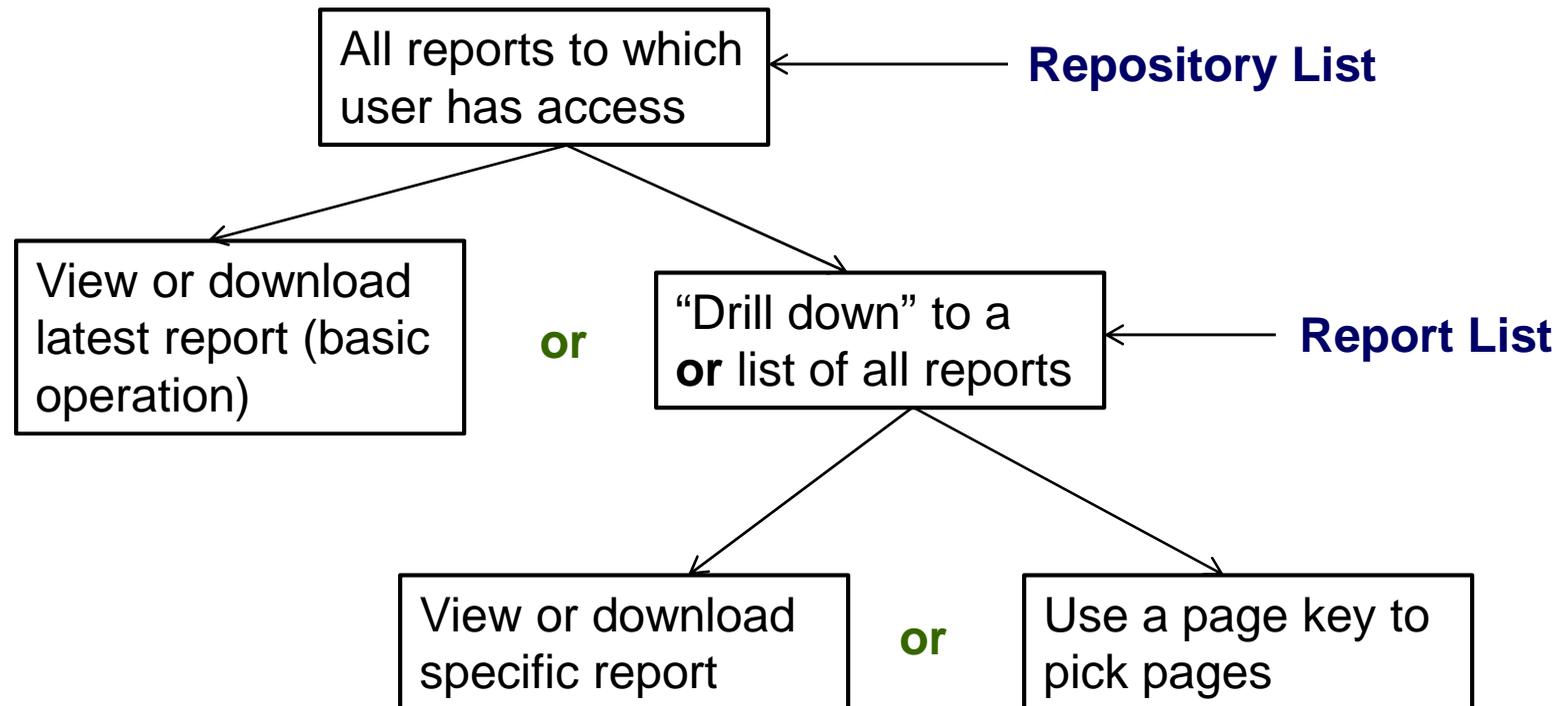
“Drill down” (used for accessing older versions of reports or when there are multiple versions of a monthly report)



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





Using the “Drill” Icon to View Reports

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

UH PROD 1 Finance

Report	Description	Latest Date
	FGRODTA Organization Detail Activity	Thu Nov 13, 2014 11:38am

UH PROD 1 Finance : FGRODTA

Title	Date
Organization Detail Activity From 01-SEP-2014 To 30-SEP-2014	Thu Nov 13, 2014 11:38am
Organization Detail Activity From 01-AUG-2014 To 31-AUG-2014	Wed Nov 12, 2014 2:56pm
Organization Detail Activity From 01-JUL-2014 To 31-JUL-2014	Fri Oct 31, 2014 07:40am
Organization Detail Activity From 01-MAY-2014 To 31-MAY-2014	Thu Jul 10, 2014 3:29pm
Organization Detail Activity From 01-APR-2014 To 30-APR-2014	Sat May 31, 2014 3:50pm
Organization Detail Activity From 01-MAR-2014 To 31-MAR-2014	Tue Apr 29, 2014 6:34pm
Organization Detail Activity From 01-FEB-2014 To 28-FEB-2014	Wed Apr 09, 2014 8:18pm
Organization Detail Activity From 01-JAN-2014 To 31-JAN-2014	Thu Mar 06, 2014 9:29pm

Organization Detail Activity From 01-SEP-2014 To 30-SEP-2014 - Thu Nov 13, 2014 11:38am Next



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 interface with three main sections. The top section is titled 'Page Key:' and has a dropdown menu with 'Orgn' selected and 'Fund' as an alternative option. Below this is a 'Search:' input field and a 'Go' button. The middle section is titled 'Pick Values Manually' and contains a 'Go' button. The bottom section is titled 'Range:' and has two input fields separated by 'to', followed by a 'Go' button. Red arrows point from the text labels to these three sections.

Pick values manually

Indicate a range of values

Provide a specific value

(Use 1 of these options.)



Selecting Page Key Values Manually

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

Banner ePrint Choose Orgn UH PROD 1 Finance Repository dambrol

About Banner ePrint | FAQ | My ePrint Change Repository | Help | Logout

UH PROD 1 Finance : FYR112R : Pick Pages : Orgn

<input type="checkbox"/> 201178	<input type="checkbox"/> 201191	<input type="checkbox"/> 201198	<input type="checkbox"/> 201220
<input type="checkbox"/> 201179	<input type="checkbox"/> 201192	<input checked="" type="checkbox"/> 201201	<input type="checkbox"/> 201221
<input type="checkbox"/> 201180	<input type="checkbox"/> 201193	<input type="checkbox"/> 201203	<input type="checkbox"/> 201225
<input type="checkbox"/> 201182	<input type="checkbox"/> 201194	<input type="checkbox"/> 201206	<input checked="" type="checkbox"/> 201226
<input type="checkbox"/> 201183	<input type="checkbox"/> 201195	<input type="checkbox"/> 201211	<input type="checkbox"/> 201227
<input type="checkbox"/> 201185	<input type="checkbox"/> 201196	<input type="checkbox"/> 201214	<input type="checkbox"/> 201228
<input type="checkbox"/> 201189	<input type="checkbox"/> 201197	<input type="checkbox"/> 201217	<input type="checkbox"/> 201229

 Get the Report

You can skip to a specific value.

Click the icon after making your selections.

Navigation buttons



Selecting A Specific Value

- 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.

Page Key: Orgn ▾

Pick Values Manually

Search: 201226

Range: to



Selecting A Specific Value (pg 2)

- To select a range of values, type 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 the range has no valid values, an error message will appear.

Page Key: Orgn ▼

Pick Values Manually

Search:

Range: to



Selecting A Range of Values

- To select a range of values, key in the beginning and ending values and click GO.

Page Key: Org

Pick Values Manually Search:

Range: to

- If the range contains valid values, e~Print will display a validation page
- If not, an error message will appear.



Using The Validation Page

- **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.**

UH PROD 1 Finance : FYR112R : Pick Pages : Orgn : Values			
"201226"	"201227"	"201228"	"201229"
"201250"	"201253"	"201254"	"201255"

Navigation bar



Viewing and Printing a Report

- **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.**



Using Acrobat® Reader

Toolbar buttons

Bookmarks correspond to page key Values (in this case, orgs)

Acrobat® Reader's Navigation Pane; click on a value to go directly to that page

The screenshot shows the Adobe Acrobat Reader interface. The toolbar at the top includes icons for file operations, navigation, and zooming, with a zoom level of 59.3%. The Bookmarks pane on the left lists various organizational units (orgs) under the folder 'FGRODTA'. The main window displays a financial report table with columns for TRANS DATE, TRANS TYPE, DOCUMENT NUMBER, DOCUMENT REF #, DESCRIPTION, ACCOUNT/FUND, BUDGET ACTIVITY, TRANSACTION ACTIVITY, ENCUMBRANCE ACTIVITY, and CMT TYP.

TRANS DATE	TRANS TYPE	DOCUMENT NUMBER	DOCUMENT REF #	DESCRIPTION	ACCOUNT/FUND	BUDGET ACTIVITY	TRANSACTION ACTIVITY	ENCUMBRANCE ACTIVITY	CMT TYP
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301		207.00		U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301		207.00		U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301		48.60		U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301			-48.60	U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301			-207.00	U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301			106.47	U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301			-936.63	U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301		959.63		U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301			-312.21	U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301		321.21		U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301		1,352.12		U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301			-1,329.12	U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301			-749.34	U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301		749.34		U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301		338.21		U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301			-312.21	U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301		749.34		U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301			-749.34	U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301		312.21		U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301			-312.21	U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301		305.61		U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301			-282.61	U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301		578.22		U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301			-565.22	U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301		624.42		U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301			-886.08	U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301		886.08		U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301			-256.66	U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301		256.66		U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301			-624.42	U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301			-565.22	U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301		606.22		U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301			-1,069.46	U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301		1,069.46		U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301			374.67	U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301			-374.67	U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301		443.04		U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301			-443.04	U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301		312.21		U
09/18/2014	INRI	I00CB20C	D0744226	Hollister Inc	701301			-312.21	U



Logging Out of e~Print

Banner ePrint

Selected Org Values

UH PROD 1 Finance Repository
dambrol

About Banner ePrint | FAQ | My ePrint

Change Repository | Help | Logout

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



Tips/Troubleshooting

- **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*.**



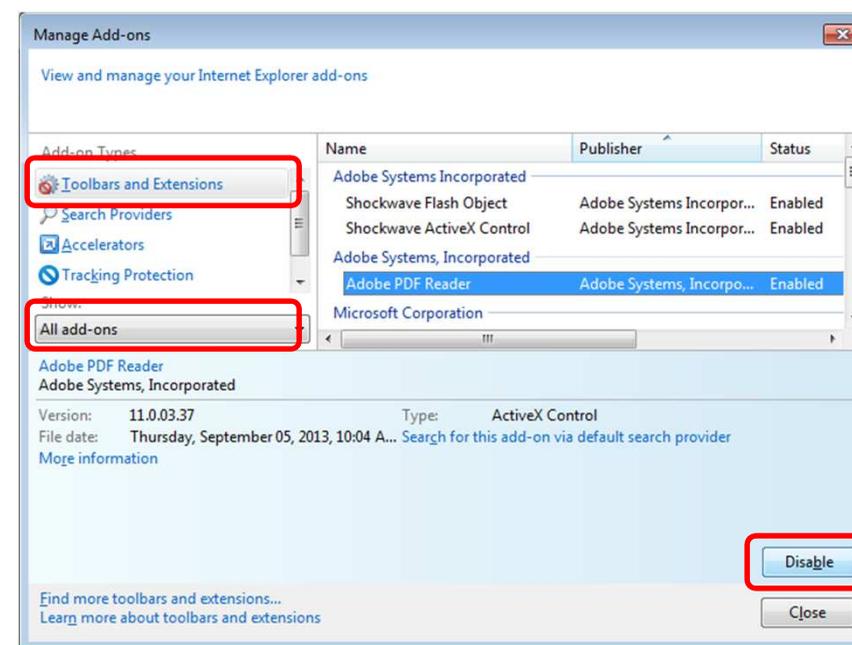
Using Acrobat® Reader in a Separate Window

Internet Explorer:

1. Open Internet Explorer, and choose Tools > Manage Add-ons.
2. Under Add-on Types, select Toolbars And Extensions.
3. In the Show menu, select All Add-ons.
4. In the list of add-ons, select Adobe PDF Reader.
Note: If you do not see the Adobe PDF Reader add-on, try the other options on the menu. For example, on some systems, the add-on appears when you select Run Without Permission.
5. Click the Enable or Disable button (it toggles depending on the status of the selected add-on):

Enable sets the Adobe PDF Reader add-on to open PDFs in the browser.

Disable turns off the add-on so it does not open PDFs in the browser.





Banner/MarketPlace Links

- Banner INB Log-In:
 - <https://baninb.rbhs.rutgers.edu/> (please note NEW web address)
- ePrint:
 - Click on above link, then click on ePrint report server. Use your BANNER username and password to log in
- Banner Self-Service:
 - Log in to the portal (my.uhnj.org), find the Self-Service area, and click on Finance then click



Banner/MarketPlace Links

- Controller' Report Library:
 - https://access.uhnj.org/Citrix/XenApp_UHNJ_Int/auth/login.aspx (please note that you must have requested access via the Service Center [3-3200])
- MarketPlace Cheat Sheets:
 - http://rbhs.rutgers.edu/ca/ist/ist_training/banner_marketplace.shtml



Banner Finance Forms pg 1

Form Name	7- Letter Naming Convention	Highlights of the Form
Check Payment History Form	FAICHKH	Summary information about check transactions.
Invoice/Credit Memo Query Form	FAINVE	Detailed information about a specific invoice or credit.
Vendor Invoice Query Form	FAIVINV	Allows you to look up UH document numbers (PO etc) if you only know a vendor invoice number.
Vendor Detail History Form	FAIVNDH	List of vendor invoices, credit memos, and payment transactions.
Budget Availability Status Form	FGIBAVL	Query the budget availability for a selected fund, organization, account and program combination.
Executive Summary Form	FGIBDSR	Summary of operating ledger budget information organized by account.
Organization Budget Status Form	FGIBDST	Detailed budget information, listed by account, for any combination of fund, organization, account, and program.
Organization Budget Summary Form	FGIBSUM	Summarized budget information, listed by category, for any combination of fund, organization, account, and program.
Document Retrieval Inquiry Form	FGIDOCR	Online query for all transactions posted by the system, including journal vouchers.



Banner Finance Forms pg 2

Form Name	7- Letter Naming Convention	Highlights of the Form
Purchase Order Activity Detail Form	FWIENC D	Displays all transactions posted against an encumbrance.
Open Purchase Orders by Vendor	FPIOPOV	Provides an online display of PO s sorted by vendor.
Organizational Encumbrance List	FGIOENC	Displays an online list of all open encumbrances for organizations.
Detail Transaction Activity Form	FGITRND	Detailed list of all transactions by fund and org. Used to analyze specific activity to an account.
Document History Form	FOIDOCH	Provides status and history of purchasing and payment documents.
Open Purchase Orders by FOAPAL Form	FPIOPOF	Provides a display of open PO s sorted by a combination of fund, organization, account, program, and activity.
Purchase/Change Order Query Form	FPIPURR	Used to look up detail information for existing purchase orders. Also used to find info to complete Order Modification Form in MarketPlace.