Banner ePrint User Guide

Release 4.0
July 2009

SUNGARD HIGHER EDUCATION

Trademark, Publishing Statement and Copyright Notice

SunGard or its subsidiaries in the U.S. and other countries is the owner of numerous marks, including “SunGard,” the SunGard logo, “Banner,” “PowerCAMPUS,” “Advance,” “Luminis,” “fsaATLAS,” “DegreeWorks,” “SEVIS Connection,” “SmartCall,” “PocketRecruiter,” “UDC,” and “Unified Digital Campus.” Other names and marks used in this material are owned by third parties.

© 2007-2009 SunGard. All rights reserved.

Contains confidential and proprietary information of SunGard and its subsidiaries. Use of these materials is limited to SunGard Higher Education licensees, and is subject to the terms and conditions of one or more written license agreements between SunGard Higher Education and the licensee in question.

In preparing and providing this publication, SunGard Higher Education is not rendering legal, accounting, or other similar professional services. SunGard Higher Education makes no claims that an institution's use of this publication or the software for which it is provided will insure compliance with applicable federal or state laws, rules, or regulations. Each organization should seek legal, accounting and other similar professional services from competent providers of the organization’s own choosing.

Prepared by: SunGard Higher Education

4 Country View Road
Malvern, Pennsylvania 19355
United States of America
(800) 522 - 4827

Customer Support Center Website

http://connect.sungardhe.com

Documentation Feedback

http://education.sungardhe.com/survey/documentation.html

Distribution Services E-mail Address

distserv@sungardhe.com

Revision History Log

Publication Date	Summary
July 2009	New version that supports Banner ePrint 4.0 software.

Think Before You Print.

Contents

Chapter 1 Getting Started

Overview **1-1**

Requirements **1-1**

Browsers 1-2

Report Readers 1-2

Chapter 2 Basic Tasks

Log on to ePrint **2-1**

Change Repositories **2-2**

Access ePrint Help **2-2**

Access Your Reports **2-2**

View Reports **2-3**

View a Current Report 2-4

View All Available Report Versions 2-4

Search a Report 2-4

Log Out of ePrint **2-6**

Chapter 3 Using My ePrint

Configure Report Groups 3-1
Reorder Search Settings 3-2
Set List Length 3-2

Troubleshooting

1 Getting Started

Banner ePrint is a web-based system designed to distribute reports securely and quickly to authorized recipients. Using a web browser, authorized users can view reports in a user-friendly format.

Banner ePrint was developed to provide a faster, safer, and more efficient solution for the process of printing and distributing reports. It handles all of the processing, from input of the formatted report file to the receipt of that report by the end-user. Reports are delivered electronically in a choice of formats that the recipient can view, search, and save. The recipient can print all or selected portions of the report. Some reports can be formatted so that the data can be imported seamlessly into a spreadsheet.

Overview

A report file is created by either the application system or a report generating application and sent to the ePrint application. When ePrint receives the report from the computer, it can perform the following processes:

- Data compressing, indexing, and formatting based on report rules defined by the ePrint administrator
- E-mail user notification that the report is available

Using built-in security, ePrint determines what reports and which pages of a report the user is authorized to access. Different pages of a report might be accessible to different users.

Reports can be viewed online, copied to CD or DVD, or routed to a printer. This allows reports to be available to authorized personnel from any work location. The electronic format of ePrint reports allows the user to execute search and analysis functions.

Depending on the policies of your institution, you might be able to view current and prior versions of the same report for trend analysis and planning.

Requirements

Banner ePrint users need the following software.

- A supported internet browser to login to Banner ePrint

- A reader that can open documents in PDF or text format

Your institution's technical support team should be able to assist you if you require help in setting up your computer.

Browsers

Banner ePrint can be accessed through a number of different standard web browsers. Below is a list of some of the compatible browsers.

- Microsoft® Internet Explorer
- Mozilla® Firefox
- Opera®
- Apple® Safari

Your ePrint administrator or SunGard Higher Education Client Services representative can give you a list of web browsers and version levels currently supported by Banner ePrint.

Report Readers

Acrobat Reader® is the recommended tool for use with ePrint.

To install the latest version of the free Acrobat Reader, go to `http://getadobe.com/reader`

2 Basic Tasks

This chapter provides the steps for following basic Banner ePrint tasks:

- "Log on to ePrint" on page 2-1
- "Change Repositories" on page 2-2
- "Access ePrint Help" on page 2-2
- "Access Your Reports" on page 2-2
- "View Reports" on page 2-3
- "Log Out of ePrint" on page 2-6

Log on to ePrint

If your system uses Shared Signon (SSO), you can log into Banner ePrint via another system. In this case, the system goes to your report repository without a separate ePrint login.

Once you are authorized to use ePrint, your system administrator will set up your account and send you the following information:

- User ID
- Password
- ePrint login page web address (URL)

1. Access the Banner ePrint login page.
2. If the **System Message is Available** link is displayed, click the link to view the message.
3. Enter your user ID and password in the appropriate fields.
4. Select the appropriate repository from the **Repositories** drop-down list.
5. Click **Enter**.

Change Repositories

If you have access to more than one repository, you may change the repository you are viewing at any time.

1. Select **Change Repository** in the top right corner of the page. A Change to box appears with a drop-down list.

2. Choose the repository you wish to view from the drop-down list. You will only be able to view repositories to which you have access.

3. Select **Go.**

Access ePrint Help

If you require assistance using Banner ePrint, you can click the **Help** link in the top right corner of any ePrint page. When you click the **Help** link, the system opens a context-sensitive topic with information about the page from which you accessed the help.

In addition, each ePrint Help page provides the following links.

- **Help Contents** displays the help system's table of contents.
- **Help Index** displays the help system's index.
- **Using Help** displays a page explaining how to use the help system.
- Related Topics, a list at the bottom of most help pages, contains a list of links that will display information about topics related to the current one.

Access Your Reports

A repository is a directory containing a folder for each report. Within each folder there can be multiple iterations of a report with different creation dates. The **Latest Date** column displays the date and time the report was created or processed by ePrint. Within the repository, you can select either the current version of the report, or you can "drill down" to see all available versions of that report.

Once you log in to Banner ePrint, your user ID and current repository are shown on the title bar. There are other useful links on the title bar. From any page you can select **About ePrint**, **FAQ**, **Change Password, Change Repository, Help** or **Logout**.

Tip

The first time you log on, you might want to go through the online tutorial, which you can access by clicking the **Help** link.

You can sort the items in your repository list by the **Report** column or the **Latest Date** column by clicking on the column title in the column heading. Repeated clicks will cause the list to toggle between ascending and descending sort orders.

If you have more than seven reports, you can page through the list by clicking “next” or use the drop-down list at the bottom of the page, which allows you to scroll through all the reports and select the report by name.

Note

If the **Repository Message is Available** link is displayed, you can click the link to view the message.

View Reports

Once you have logged on to ePrint, the system displays a list of all the reports within the current repository that you are authorized to view. The format of the report you sent to ePrint will determine how you may view the report.

The following formats are used for text-based reports:

- PDF — Adobe Portable Document Format (.PDF), viewed with Acrobat Reader
- TEXT — standard text format (.txt), which can be read using your default text editor

Tip

To see another report, return to the report selection page. If you are currently viewing a PDF report within the browser, click the browser's **Back** button. If you are outside the browser, close the Acrobat Reader window.

The following formats might be used depending on the report:

- HTML — standard HTML format viewed within your browser
- DOC — word processing document format

- PPT — Microsoft PowerPoint format
- RTF — Rich Text Format document typically read by any word processor
- DATA — comma-separated value format that can be imported into Microsoft Excel
- XLS — Microsoft Excel spreadsheet format

Detailed information about each of these report options is available in the online help, which you can access by clicking the **Help** link on any page.

View a Current Report

You can view the current version of a report or old versions.

The easiest way to access the current version is to click the icon for the format in which you want to view the report.

View All Available Report Versions

To view a list of available versions of a report, click See Report List . When the list of all versions is displayed, click the appropriate format icon for the version you want to view.

Search a Report

Some reports have "page keys", which are user-defined indexes to each page of the report. Page keys vary by report and can include such items as organization, account, division, department, and fund. They allow you to enter "search criteria" so that the pages displayed include only the information you specify. If page keys have been defined for a report, a Search Report icon is displayed next to the title along with the report format icons.

1. Click Search Report for the desired report.

   The system displays the Pick Pages page.

2. Select the desired option from the drop-down menu in the **Page Key** field.

3. If you want to specify manually the values for which pages are to be displayed, continue as follows.

   3.1. Click **Go** in the Pick Values Manually section.

   The system displays the Choose page.

   3.2. Select the checkbox for each value you want to include.

   3.3. Click Get the Report .

   The system displays the Values page.

   3.4. Click the icon for the format in which you want to view the report.

   The system displays the report in your selected format.

4. If you want to search for the values for which pages are to be displayed, continue as follows.

   4.1. Enter the desired value in the **Search** field.

Note

To assist in your search, wildcards can be used. % is the wildcard indicator. You are limited to two wildcards per search. Each wildcard represents one or more characters. For example, if you enter *%son*, results could include *Carson*, *Emerson*, *Harrison*, *Ison*, *Mason*, and so on.

   4.1. Click **Go** in the Search section.

   The system displays the Values page.

   4.2. Click the icon for the format in which you want to view the report.

   The system displays the report in your selected format.

5. If you want to specify a range of values for which pages are to be displayed, continue as follows.

   5.1. Enter the first value in the range in the first of the **Range** fields.

   5.1. Enter the last value in the range in the second of the **Range** fields.

   5.1. Click **Go** in the Search section.

   The system displays the Values page.

   5.2. Click the icon for the format in which you want to view the report.

   The system displays the report in your selected format.

6. If you want to select a different report, return to the main menu by clicking on the repository name link on the navigation bar near the top of the ePrint page.

7. If you want to save your current setting for future use, enter an identifer on the validation page. This identifier will be saved for future use with this report and page key. To use this setting in the future, from the Select Values page, select the identifier for the options you would like and click **Go**. To adjust the order of the entries in the drop-down list, refer to “Reorder Search Settings” in My ePrint.

Log Out of ePrint

If you do not log out before you leave the ePrint pages, the system will automatically log you out when you exit the browser. For security reasons, you should log out of ePrint if your browser will remain open and you will be leaving your computer unattended.

1. If you are viewing a PDF file within the browser, click the browser’s **Back** button to return to the ePrint report selection page.

   If you are viewing a PDF file outside the browser, close the Acrobat Reader window to return to ePrint.

2. Click the **Logout** link in the top right corner of the page.

   The system displays the Login page.

3 Using My ePrint

Using the My ePrint function, you can customize the way you interact with Banner ePrint. You can determine how many reports you view on a page, customize the order of your search settings, and group reports in various ways for ease of use.

To open My ePrint, click the link at the top of the page. The link is located next to the *About Banner ePrint* and *FAQ* links.

There are three main tab functions:

- Configure Report Groups
- Reorder Search Settings
- Set List Length

Configure Report Groups

The Configure Report Groups area provides three function tabs: Create Groups, Modify Groups, and Reorder Groups.

Create Groups

The Create Groups tab allows you to assemble your accessible reports into work-related groups. Working with the list of reports that are available to you, highlight those reports that you would like to group, and use the right arrow button to “move” them to the Selected reports area. You can also adjust the display order of the reports within the group. Select a report and use the up/down buttons to reorder its position. Reports can appear in more than one group.

You can speed the process of creating a group by using an existing group as your starting point. Select your reference group from the *Copy this group* drop-down list.

Supply an identifier for the group of reports and save your entry. The group name will appear as the tab name with your repository list page.

Modify Groups

Once your groups are created, you can adjust them from time to time as needed. You can change the name of the report group by updating the Group Name field. You can add or remove reports using the same procedure with which you created the group, and you can adjust the order in which to display the reports.

You can also set a report group to be your default group, a subset of the reports in the repository that you wish to see when you first log in to Banner ePrint. Select the desired group and click **Default**. To remove a default setting from a group, select the group and click **Default**. Click **Save** to save your changes.

Remember that you can always view the entire list of reports by selecting the repository name from the navigation bar.

Reorder Groups

Once you have defined multiple groups, you can adjust the order in which the tabs display. Select the group whose display position you wish to adjust and use the up and down arrows to modify the order to your preference.

Reorder Search Settings

Use this tab to reorder the drop-down list of your saved search settings for a given report and the page key within that report. Select the report and the page key from the list of reports for which you have saved search settings. Using the up and down button, select a setting name and position it in the order that you prefer. This creates the drop-down list of settings that display when you perform the Pick Pages function of the report. Click **Save** to save your changes.

Set List Length

You can set the number if reports to include in your list of viewable reports. You can set up to eight reports. Click **Save** to save your changes.

Troubleshooting

This section provides tips for responding to some situations that may arise while you're using Banner ePrint.

- "Downloading Takes Me to Login" on page T-1
- "Large Spreadsheets" on page T-1
- "Locked User ID" on page T-1
- "No Reports to View in the Repository" on page T-1
- "Reports with No Pages" on page T-2
- "Viewing "My" Reports" on page T-2
- "Viewing Large Reports" on page T-2
- "Warning — Page Expired" on page T-2

Downloading Takes Me to Login

If you try to download a report but the system displays the login page instead, check the following in your browser:

- Your browser must be set to accept cookies.
- Your security setting should not be higher than *Medium*.

Large Spreadsheets

When using the CSV (comma-separated value) feature of ePrint, you might encounter a problem if the selected output exceeds 65,536 lines. (This is a Microsoft Excel limit.) The only workaround is to split the report. SunGard Higher Education recommends that institutions use Value-Based Security (VBS) to limit the number of pages that can be viewed so that users using this function do not encounter this problem.

Locked User ID

When logging in, enter your user ID and password carefully. If you repeatedly enter an incorrect password, your account might become locked. To regain access to ePrint, contact your system administrator and request that your account be unlocked.

No Reports to View in the Repository

When you first log into a repository, you may see a message that informs you that there are no reports to view in that repository. There is nothing wrong with your

system, it simply means that there are not any reports available. It could be that reports which were there previously have been deleted or archived.

Reports with No Pages

If you have access to a report but there is no relevant data, the system displays the message: *There are no pages for you to view on this report. If you think this is an error, contact your ePrint administrator. Otherwise, return to ePrint and select another report.* This will occur when a report is controlled by Value-Based Security (VBS). For example, there might be pages for the report for one month, but the next month has no activity; in this case, there are no pages to view for the second month.

Viewing "My" Reports

If there are reports you think you should be able to view but they do not appear in the repository, contact your manager for authorization to view additional reports. Your ePrint administrator can remove from your repository any reports you no longer need.

Viewing Large Reports

While you are attempting to view very large reports inside the browser window, your browser might lock up. ePrint will warn you when this is about to occur. Follow the onscreen instructions to download the report to your hard drive. The downloaded file can be viewed outside the browser window.

You can also use the navigation bar to return to the report list and select the Search Report to access the Page Keys page, which allows you to enter "search criteria" so that the pages displayed include only the information you specify. Refer to "Search a Report" on page 2-4 for information about using this feature.

Warning — Page Expired

If the error *Warning — Page Expired* message is displayed when you are viewing a report, it is because Internet Explorer (IE) is set to create this warning message as a security precaution. To eliminate this message, take the following action:

1. From the IE toolbar, select Tools > Internet Options.
2. Select the Advanced tab.
3. Scroll to the Security section.
4. Clear the **Do not save encrypted pages to disk** checkbox.