

# e~Print User Guide

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# Contents



## **Chapter 1 Getting Started**

<b>Overview</b> . . . . .	<b>.1-1</b>
<b>Requirements</b> . . . . .	<b>.1-2</b>
Browsers . . . . .	.1-2
Report Readers . . . . .	.1-2

## **Chapter 2 Basic Tasks**

<b>Log on to e~Print</b> . . . . .	<b>.2-1</b>
<b>Access e~Print Help</b> . . . . .	<b>.2-2</b>
<b>Access Your Reports</b> . . . . .	<b>.2-2</b>
<b>View Reports</b> . . . . .	<b>.2-3</b>
View a Current Report . . . . .	.2-3
View All Available Report Versions. . . . .	.2-4
Search a Report . . . . .	.2-4
<b>Log Out of e~Print</b> . . . . .	<b>.2-5</b>

## **Chapter 3 Troubleshooting**



# 1

# Getting Started



e~Print 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.

e~Print 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.

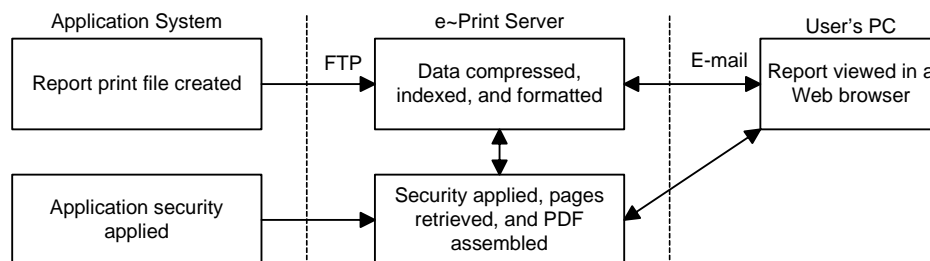
## Overview

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

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

Using built-in security, e~Print 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.

This data flow is shown in the following illustration.



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 e~Print 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

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e~Print users need the following items on their computers:

- A supported internet browser to login to e~Print
- 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

e~Print can be accessed using a standard web browser such as:

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

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

## Report Readers

Acrobat Reader® is the recommended tool for use with e~Print.

To install the latest version of the free Acrobat Reader, go to <http://www.adobe.com/products/acrobat/readstep.html>.



This chapter provides the steps for following basic e~Print tasks:

- “Log on to e~Print” on page 2-1
- “Access e~Print Help” on page 2-2
- “Access Your Reports” on page 2-2
- “View Reports” on page 2-3
- “Log Out of e~Print” on page 2-5

## Log on to e~Print

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

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

- User ID
  - Password
  - e~Print login page web address (URL)
1. Access the e~Print 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** pulldown list.
  5. Click **Enter**.

### Note

If you need to change repositories after you have logged in, you must log out and then log in again selecting a different repository. ■

## Access e~Print Help

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If you require assistance using e~Print, you can click the **Help** link in the top right corner of any e~Print 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 e~Print 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

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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 e~Print. 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 e~Print, 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 e~Print**, **FAQ**, **Help** or **Logout**.



### Tip

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.



### Tip

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



### Tip

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



### 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.

# View Reports

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Once you have logged on to e~Print, 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 e~Print 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.


### Tip

If the report has a Search Report icon , you can click it to display the Pick Pages page, which is explained in \_\_\_\_.

## 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 pulldown menu in the **Page Key** field.

### Note


If only one option has been defined for this report, the **Page Key** field is not displayed.

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 e~Print page.

## Log Out of e~Print

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If you do not log out before you leave the e~Print pages, the system will automatically log you out when you exit the browser. For security reasons, you should log out of e~Print 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 e~Print report selection page.

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

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

The system displays the Login page.

If desired, you can login again, selecting the same or a different repository.



This section provides the following troubleshooting tips:

- “Downloading Takes Me to Login” on page 3-1
- “Large Spreadsheets” on page 3-1
- “Locked User ID” on page 3-1
- “Reports with No Pages” on page 3-2
- “Viewing “My” Reports” on page 3-2
- “Viewing Large Reports” on page 3-2
- “Warning — Page Expired” on page 3-2

## 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 e~Print, 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 e~Print, contact your system administrator and request that your account be unlocked.

## 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 e~Print administrator. Otherwise, return to e~Print and select another report.* This can 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 do not appear in the repository, contact your manager for authorization to view additional reports. Your e~Print administrator can remove from your repository any reports you no longer need.

## Viewing Large Reports

While trying to view very large reports inside the browser window, your browser might lock up. e~Print 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.