York University

Introduction to eReports

Self-training Manual

Introduction to eReports Table of Contents

Course Objective

This self-training course is designed for anyone involved with obtaining, developing and/or analyzing financial, human resources, telecom or other reports available through the eReports application.

The focus of this session will be on the navigation, searching and print/export features of the eReports application.

During this training session, participants will focus on:

- Access and security
- Understanding the system requirements
- Navigating through the eReports application
- Running reports
- Reading reports
- Searching within reports
- Exporting and printing reports

This course will *not* teach you how to understand financial reports or finance procedures. For this we recommend that you follow up with the Finance Division course "eReports for Advanced Users" (E2RP20) and/or "eReports for Researchers" (FNERP1).

Access and Security

To access data and reports in the eReports system, you need to have a **Passport York account,** and to have been granted eReports access privileges to the types of eReports that you need.

Passport York

If you do not already have a Passport York account, you may obtain one by following the instructions located at:

www.yorku.ca/computing/facultystaff/accounts/

If you have questions about obtaining a Passport York account, please direct them to the Client Services Helpdesk:

(416) 736-5800 or on-campus x55800
askit@yorku.ca

Access Privileges

Once you have a Passport York account, your manager or Finance Officer or Executive Officer should submit a request to establish your eReports access. They will need to provide:

- Your Passport York username
- A list of the cost centres and/or reports that you need
- Specify whether the requested reports are for Finance and/or Human Resources

Each eReports user will only be able to see the reports that he/she is allowed to access.

For funds 100, 200 and 300 it is necessary to provide the requested access level i.e.: Basic, Intermediate or Advanced.

For Funds 400 and 500 access, request must come from the cost centre manager or Research Accounting. No one else can make requests for Funds 400 and 500.

For Fund 600 requests must come from the cost centre manager. Finance will get additional approval from the Treasury Department before setting up access.

Depending on the type of eReports access required, the request is forwarded to Finance, Human Resources or Advancement Services.

Problems with your eReports data or reports should be reported to Client Services helpdesk (askit@yorku.ca).

Getting Started

eReports Log In Page

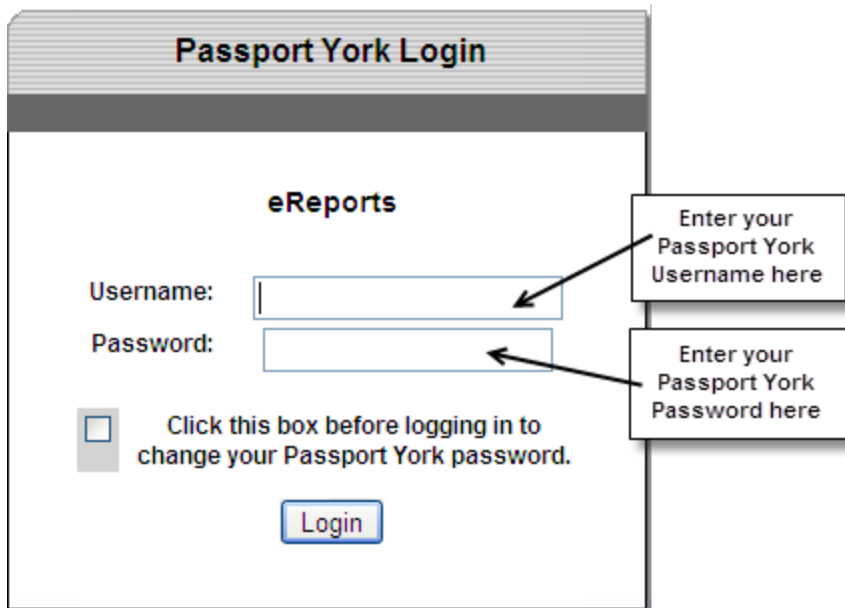**Step 1:** Once you are granted eReports access, click on the link below:

https://ereports.uit.yorku.ca/ereports/

This will direct you to the eReports log in page.

Step 2: Review the options on the eReports log in page.

Step 3: Click on the [LOGIN NOW ▸] button. This will direct you to eReports Production log in page:

Step 4: Enter your Passport York username and password

Step 5: Click on the [Login] button to log into eReports home page. Then, you can start working with eReports.

Remember to Log Out

To ensure confidentiality and security, and to avoid leaving your eReports session "hanging", you should always log out properly.

Locate the **Logout** button in the upper-right hand corner of the window. Clicking this button will log you out of eReports securely.

Navigate Within eReports

The Home Page & Menu Tabs

When you first login to eReports, you will see the **Home** page. The home page contains announcements for all reporting systems in eReports.

Above the Announcements section is the eReports **menu bar**.

The menu bar appears as a row of **tabs** leading to specific areas of the eReports system: Home, Human Resources, Finance, Search, etc.

- You can only see the tabs for the areas of the eReports system that you are allowed to access.

- A tab can have subcategories or **subtabs**; these will appear in the row below the main tabs when you are in that part of the system.

- The tab for the area you are in is displayed as black text on a grey background. The subtab for the subcategory you are in is displayed as black text on a white background.

The Finance Tab

When you click on the Finance tab a row of *subtabs* appears underneath the tab: e.g., Financial Management, Purchases & Payables. You can only view or access these tabs if you have appropriate security access.

Each subtab page has a similar layout: **Reports**, **Help**, and **Related Links** on the left, and **Cost Centres / Financial Rollups' Account Balances** on the right hand side of each page.

The lists of Cost Centres / Financial Rollups' Account Balances provide a quick summary without having to open individual Statement of Operations (SOP) reports. These are grouped based on the purpose defined by the Fund (e.g. Operating, Ancillary, and Research Funds).

Reports are **updated daily at night;** the Balance Available amounts show true balances as of the previous working day.

Please follow the steps below to open the **Statement of Operations** for that Financial Rollup or Cost Centre under one of the **Balance Available** links.

Step 1: Click on the **Finance** tab.
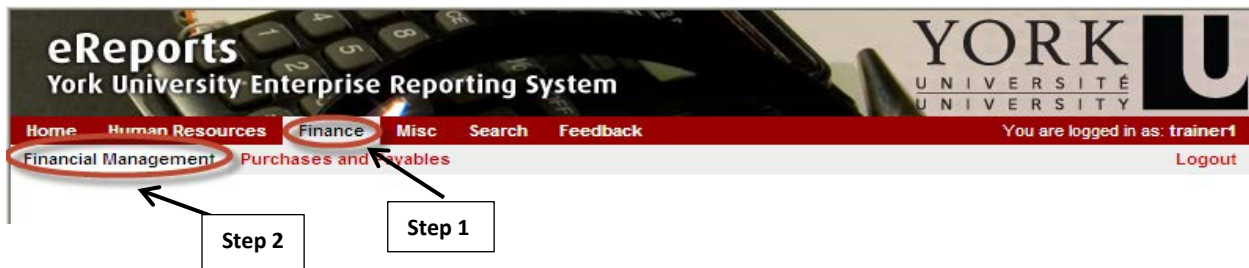
Step 2: Click on the **Financial Management** subtab.

Step 3: Click on the **Balance Available** link of **Division of VP Finance & Administration** in **Operating Fund** section.

A new window/tab for the **Statement of Operations** for financial rollup, **Division of VP Finance & Administration**, for **Operating Fund** will pop up.

Information Console - [SOP Node Summary Fund 23] - Windows Internet Explorer

https://ereports.uit.yorku.ca/ereports/iportal/activePortal/viewer/viewframeset.jsp?__executableid=812080000100&id=5109&connectionHandle=bAq%2by9HJrv6%2bA9

File   Edit   View   Favorites   Tools   Help

Convert   ▾   Select

Information Console - [SOP Node Summary Fund 23]

Index | ◀◀ | ◀ | ▶ | ▶▶ | Goto | Page 1 of 117 | 100% ▾ | Search | Export/Print | Close

STATEMENT OF OPERATIONS

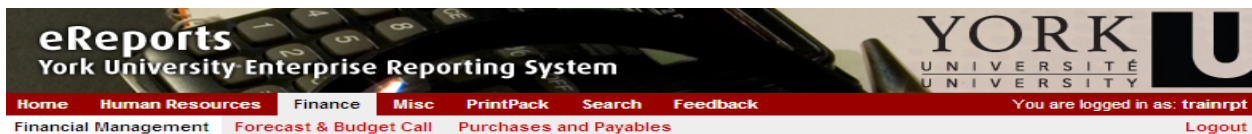Fund Code: 200 | For the Period Ended: 31-Oct-12 | Run Date/Time: 2/26/2013 8:11:24 PM
Fiscal Year: 2013

VP Finance & Administration   Click here to exclude Salary Commitment Amounts

Current Month Actual	Account Description	Account#	Annual Budget	Current YTD Actual	Current YTD Commitment	Total (Act+Commit)	Budget to YTD Total Var	% Remaining	Prior YTD Total
	Revenue								
257.25	ECR Maintenance Recovery	090500	-	257.25	-	257.25	257.25	0%	-
257.25	**Total External Cost Recoveries**		-	257.25	-	257.25	257.25	0%	-
-	ICR Sales+Supplies-Intrdprtmnt	032600	-	7,942.20	-	7,942.20	7,942.20	0%	-
-	ICR Salaries-Support	032900	55,319.44	-	-	-	(55,319.44)	0%	-
1,098.00	ICR Workstudy Recoveries	033150	3,294.00	1,098.00	-	1,098.00	(2,196.00)	0%	-
-	ICR Benefits-Support	033300	12,170.23	-	-	-	(12,170.23)	0%	-
-	ICR Overhead	034020	89,267.40	-	-	-	(89,267.40)	0%	-
1,098.00	**Total Internal Cost Recoveries**		160,051.07	9,040.20	-	9,040.20	(151,010.87)	0%	-
-	Transfer from Capital - Fund 7	092500	1,098,000.00	-	-	-	(1,098,000.00)	0%	-
-	Transfer from Ancillary-Fund 3	092600	1,244,400.00	-	-	-	(1,244,400.00)	0%	-
-	**Total Other Revenue**		2,342,400.00	-	-	-	(2,342,400.00)	0%	-
(241.42)	InYear OTO to/fr GI/Com	099500	370,392.00	(241.42)	-	(241.42)	(370,633.42)	0%	-
-	InYear OTO to/fr OtherDept	099911	(2,066,146.86)	-	-	-	2,066,146.86	0%	-
-	InYear OTO to/fr WinFac/Dept	099912	(985,272.00)	-	-	-	985,272.00	0%	-
(241.42)	**Total OTO Budget Allocations**		(2,681,026.86)	(241.42)	-	(241.42)	2,680,785.44	0%	-
-	Initial CutBase fr 20 to Com	099010	2,110,503.78	2,110,503.78	-	2,110,503.78	-	0%	2,052,880.82
-	Initial Non-CutBase fr20 toCom	099011	732,000.00	732,000.00	-	732,000.00	-	0%	-
965.69	InYear Cut Base to/fr GI/Com	099100	-	965.69	-	965.69	965.69	0%	5,872.33
-	Base Cut	099101	(68,590.98)	(68,591.35)	-	(68,591.35)	(0.37)	0%	(39,544.10)
-	InYear CutBase to/fr OtherDept	099110	-	-	-	-	-	0%	78,760.27
-	InYear NonCutBase to/fr GI/Com	099111	-	-	-	-	-	0%	732,000.00
965.69	**Total Base Budget Allocations**		2,773,912.80	2,774,878.12	-	2,774,878.12	965.32	0%	2,829,969.32
724.27	**Total Central Allocations**		92,885.94	2,774,636.70	-	2,774,636.70	2,681,750.76	2,887%	2,829,969.32
2,079.52	**Total Revenue**		2,595,337.01	2,783,934.15	-	2,783,934.15	188,597.14	7%	2,829,969.32
	Expenses								
29,611.10	Sal Ft Acad Yufae Prob/Ten	101200	113,773.30	67,866.59	45,906.65	113,773.24	0.06	0%	45,906.59
29,611.10	**Total Faculty - Admin Salaries**		113,773.30	67,866.59	45,906.65	113,773.24	0.06	0%	45,906.59
5,922.22	Ben Ft Acad Yufae	201200	22,754.95	13,573.30	9,181.48	22,754.78	0.18	0%	9,181.30
5,922.22	**Total Faculty - Admin Benefits**		22,754.95	13,573.30	9,181.48	22,754.78	0.18	0%	9,181.30

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Step 4: Click the ⊠ icon on the Navigation Toolbar at the top of the screen to return to the Financial Management page.

💡 On the real eReports server you may not see the same menu items as in the example above. You will only see those areas that you are allowed to use based on your eReports access profile.

Browse for Reports

Each subtab lists the available reports for that area on the left of the page. You will find different reports under Financial Management than you find under Purchases and Payables.

Please follow the steps below to start the process of generating a particular report. (For more on how to use the report *criteria selection page*, see *Running Reports* on page 15 in this manual.)

Subtab 1: Click on **Finance** tab ⇨ **Financial Management** subtab, the Financial Management page is displayed.

A list of the reports available on the Financial Management page is displayed.

Subtab 2: Click on **Finance** tab ⇨ **Purchases and Payables** subtab, the Purchases and Payables page is displayed.

A list of the reports available on the Purchases and Payables page is displayed.

Search for Reports

If you experience difficulties in finding the report you need by browsing the lists of reports, you can search for it by using the Search page.

Click on the **Search** tab and type a search term (e.g., a few letters from the report title) into the text box, then click the "Search" button.
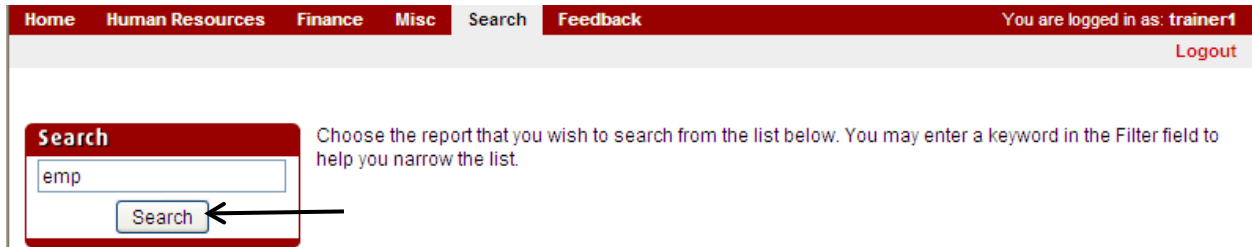
A list of report names that match your search term will appear. The search results will indicate the page on which the report appears by its tab and subtab name.

Please follow the steps below to search for the report you wish to view. (For more on how to use the report *criteria selection page*, see *Running Reports* on page 13 in this manual.)

Step 1: Click on the **Search** tab.

**Step 2:** Type **emp** in the Search box, then click the **Search** button.

Lists of all reports with "emp" in the title are displayed.

Search Results for: emp

Finance: Financial Management
  Employee and Institutional Advances

Human Resources: Personnel
  Employee Job Detail
  Employee Listing by Department
  Employee Personal Data

Running Reports

After you click a report link, a *criteria selection page* will appear asking you to filter the report to get exactly the information you need. The following example shows how to run multi-criteria report:
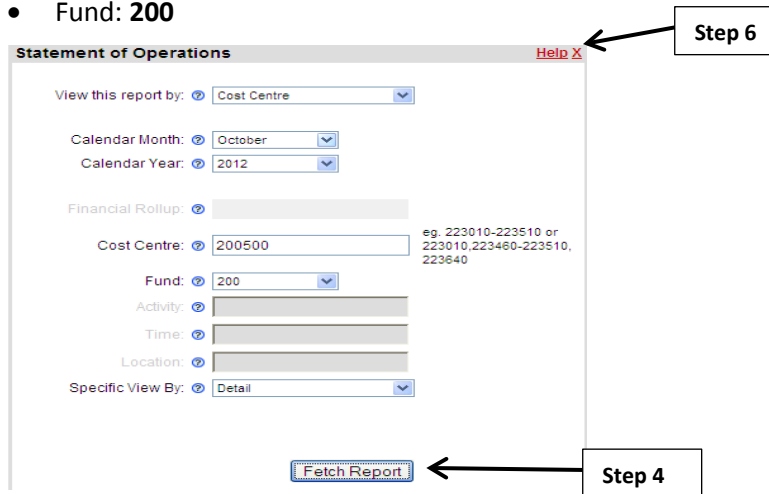
Run a Multiple-Criteria Report
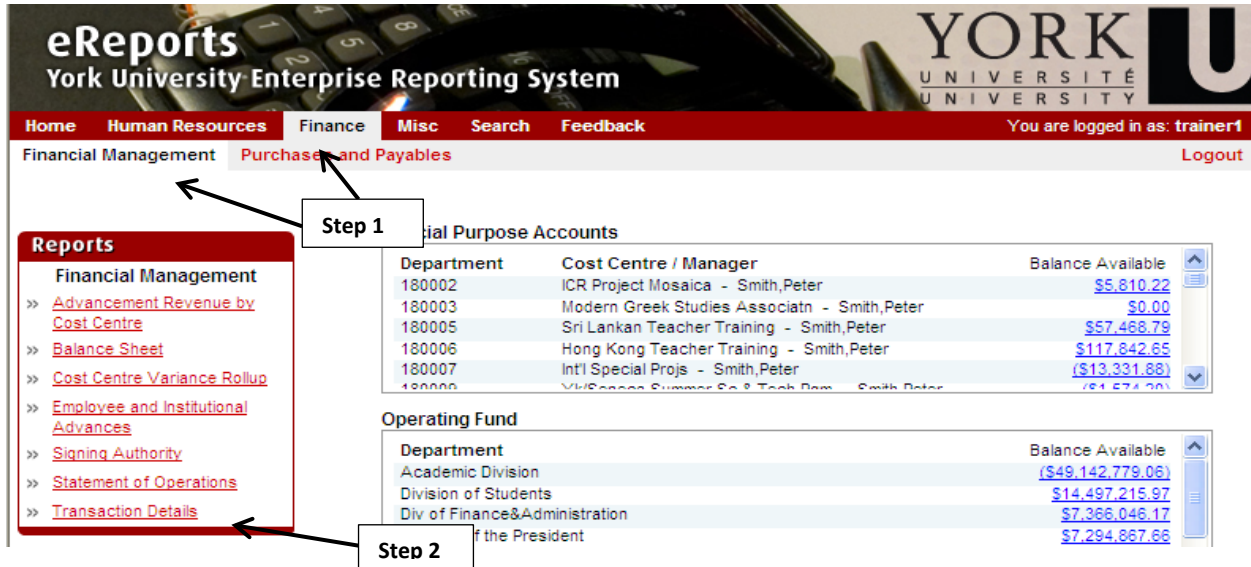
Step 1: Click on **Finance** tab ⇨ **Financial Management** subtab.

Step 2: Click the **Statement of Operations** report link to load the Statement of Operations report criteria page.

Step 3: Select your criteria in the criteria page as follows:

- View this report by: **Cost Centre**
- Calendar Month: **October**
- Calendar Year: **2012**
- Cost Centre: **200500**
- Fund: **200**

Step 4: Click the **Fetch Report** button to load a Statement of Operations based on all of the chosen criteria.

Step 5

Step 5: Click the ⊠ button on the Navigation Toolbar to close the Statement of Operations report window.

Step 6: Click the *X* on the criteria page to close the criteria page to return to the Finance Financial Management main page.

Reading Reports

When you are viewing a report you will find a toolbar at the top of the window. This toolbar allows you to navigate page-by-page through the report, go to a specific page, browse the report's index, search within the report, export all or part of the report to a PDF file, and close the report.

> *If the eReports toolbar becomes distorted, press the **Refresh** button on your browser's toolbar.*
>
> *If a long report is loading, you may see **Page 1 of +** on the toolbar until all of the pages have loaded.*

Move Page-by-Page

Step 1: Click **Finance** tab ⇨ **Purchases and Payables** subtab.

Step 2: Click the **Purchase Order Status** report link to load the criteria page for the Purchase Order Status report.

Step 3: Select **200** in the **Fund** field (leave the Cost Centre field empty) to enter a fund criterion for all cost centres.

Step 4: Click the **Fetch Report** button to load a large Purchase Order Status report.

Step 5: Click [navigation icons] to move one page back and forth, or to the first or last page in the report.

Step 6: Type **25** into the Page box and click **Goto** button [Goto Page 25 of 311] to display page 25 of the report.

Zoom In & Out

Zooming in and out of a report makes it easier to view specific sections of a report or an entire report page. The scaling range is from 25% to 400%.
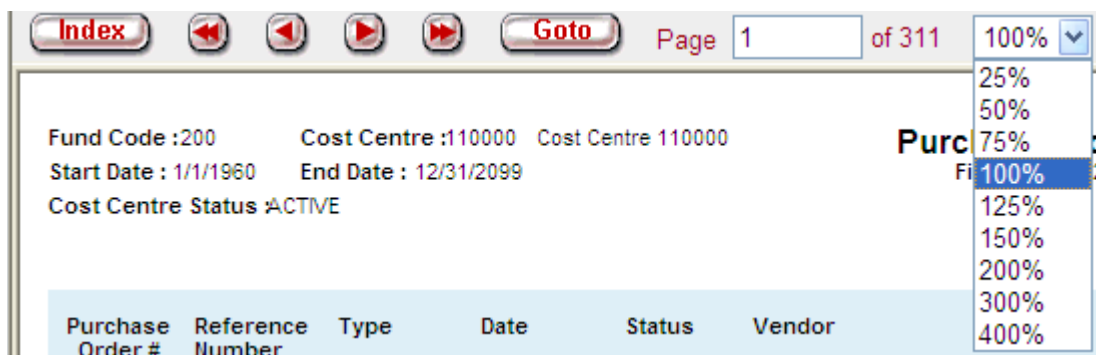
Please follow the steps below to zoom in and out using the Purchase Order Status report you generated in the previous section.

Step 1: Click the drop-down arrow on zoom box and select 200% to scale the current report and all subsequent reports

Step 2: Click the drop-down arrow on zoom box and select 100% to set the magnification back to 100% for all subsequent reports

Step 3: Click the [X] button on the navigation toolbar to close the Purchase Order Status report.

Use the Index

Reports typically contain a generated index, which appears in a pane to the left of the report. You can view the index with sections collapsed or expanded to show the level of detail you want.

Please follow the steps below to use the index to navigate detailed levels of the report.

Step 1: Load the Statement of Operations report for cost centre 200500 by following steps 1 - 4 in pages 13 – 14.

Step 2: Click the [Index] button to open the Index pane.

Step 3: Click the twisty ▷ next to an index entry to expand to show all cost centres with that range.

Step 4: Click the [Index] button to close the Index pane.

Follow Hyperlinks

Some reports contain hyperlinks to allow users to move from the current report to a related report. Hyperlinks are blue and underlined, and the cursor changes to a small hand when you point at them. Not all reports include hyperlinks.

Please follow the steps below to move from current report to a related report using hyperlinks using the Statement of Operations report for cost centre 200500 generated in the previous section.

Step 1: From Statement of Operations (SOP)**,** click on the hyperlink in the **Current Month Actual** column for account **099500** (i.e. $2,997.17) to load the Transaction Detail report for the month of October 2012 related to account **099500** and cost centre **200500**.

Information Console - [SOP CC Summary Fund 23] - Windows Internet Explorer

https://ereports.uit.yorku.ca/ereports/iportal/activePortal/viewer/viewframeset.jsp?__vp=EREPORTS&locale=en_US&id=5110&connectionHandle=bAq%2by9HJrv6%2bA

File   Edit   View   Favorites   Tools   Help

Convert   ▼   Select

Information Console - [SOP CC Summary Fund 23]

Index   Goto   Page 1   of 3   100%   Search   Export/Print

STATEMENT OF OPERATIONS

Fund Code: 200   Cost Centre: 200500   Cost Centre 200500
Start Date: 1/1/1960   End Date: 12/31/2099
Cost Centre Status: ACTIVE   HST Rebate Rate: 73%

For the Period Ended: 31-Oct-12
Fiscal Year: 2013

Run Date/Time: 2/26/2013 8:21:12 PM
Manager: Smith, Peter
Location: Scott Library
Department: 10400   Dept 10400

Click here to exclude Salary Commitment Amounts

Current Month Actual	Account Description	Account#	Annual Budget	Current YTD Actual	Commitment	Total (Act+Commit)	Budget to YTD Total Var	% Remaining	Prior YTD Total
	Revenue								
(2,997.17)	InYear OTO to/fr GI/Com	099500	(2,969.88)	(2,997.17)	-	(2,997.17)	(27.28)	1%	-
(2,997.17)	**Total OTO Budget Allocations**		(2,969.88)	(2,997.17)	-	(2,997.17)	(27.28)	1%	-
-	Initial CutBase fr 20 to Com	099010	85,759.66	85,759.66	-	85,759.66	-	0%	75,503.60
11,988.67	InYear Cut Base to/fr GI/Com	099100	-	11,988.67	-	11,988.67	11,988.67	0%	-
-	Base Cut	099101	(2,787.18)	(2,787.18)	-	(2,787.18)	-	0%	(1,698.97)
11,988.67	**Total Base Budget Allocations**		82,972.48	94,961.15	-	94,961.15	11,988.67	14%	73,804.63
8,991.50	**Total Central Allocations**		80,002.60	91,963.98	-	91,963.98	11,961.39	15%	73,804.63
8,991.50	**Total Revenue**		80,002.60	91,963.98	-	91,963.98	11,961.39	15%	73,804.63
	Expenses								
5,042.57	Sal Ft Support Staff-CPM	140000	59,179.30	30,255.43	30,255.76	60,511.19	(1,331.88)	0%	29,589.65
40,458.06	Sal Ft Support Yusa	140100	461,214.09	225,770.21	242,507.93	468,278.14	(7,064.08)	0%	223,426.35
-	Sal Overtime Yusa	158100	2,928.00	672.81	-	672.81	2,255.19	77%	582.91
11,808.82	Sal-Staff-N/PermPT<24.5YUSA2	162800	131,760.00	17,808.68	-	17,808.68	113,951.32	86%	22,207.73
-	Wages -Clerical Casuals - Sum	163300	73,200.00	63,578.07	-	63,578.07	9,621.93	13%	78,306.21
-	Wages-NonClerical	163400	-	-	-	-	-	0%	298.25
-	YUTA Salary	164000	-	1,010.00	-	1,010.00	(1,010.00)	0%	3,285.93
-	YUTA Agency Fees	164001	951.60	133.22	-	133.22	818.38	86%	471.17
57,309.45	**Total Support Staff - Salaries**		729,232.99	339,228.42	272,763.69	611,992.11	117,240.86	16%	358,168.20
1,109.37	Ben Ft Support Staff CPM	240000	13,019.45	6,656.21	6,656.08	13,312.29	(292.84)	0%	6,509.73
11,125.95	Ben Ft Support Staff Yusa	240100	126,833.88	62,086.70	66,689.59	128,776.29	(1,942.41)	0%	61,442.23
-	Benefits Overtime Yusa	258100	805.20	185.03	-	185.03	620.17	77%	160.30
1,181.03	Ben-Staff-N/PermPT<24HrYUSA	262800	13,176.00	1,781.20	-	1,781.20	11,394.80	86%	2,221.08
-	Ben Cler'l Casuals Summer	263300	7,320.00	6,358.39	-	6,358.39	961.61	13%	7,831.32
-	Benefits-NonClericalCasuals-Su	263400	-	-	-	-	-	0%	76.65
-	Benefits - YUTA	264000	-	101.00	-	101.00	(101.00)	0%	328.59
13,416.35	**Total Support Staff - Benefits**		161,154.53	77,168.53	73,345.67	150,514.20	10,640.33	7%	78,569.90
70,725.80	**Total Support Staff Salary & Benefit**		890,387.52	416,396.95	346,109.36	762,506.31	127,881.19	14%	436,738.10
70,725.80	**Total Total Salaries and Benefits**		890,387.52	416,396.95	346,109.36	762,506.31	127,881.19	14%	436,738.10

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Step 2: Transaction Details Report can now be retrieved to show the Transaction Amount of $2,997.17 in Account 099500 incurred in current month indicated in the Statement of Operations (i.e. Current Month Actual column).

Step 3: Click the ⬅ button to return to the original Statement of Operations report.

Step 4: Click the ✖ button on the navigation toolbar to close the Statement of Operations report.

Searching Within a Report

Set Up Search Fields

Step 1: Load the Purchase Order Status report for fund 200 by following steps 1 - 4 in pages 19 – 20.

Step 2: Click on the **Search** button to load the Search pane.

Step 3: Click the data for the following fields in the Report to enter the fields into the search screen.

- Cost Centre
- Cost Centre Name
- Cost Centre Effective Status
- PO Number
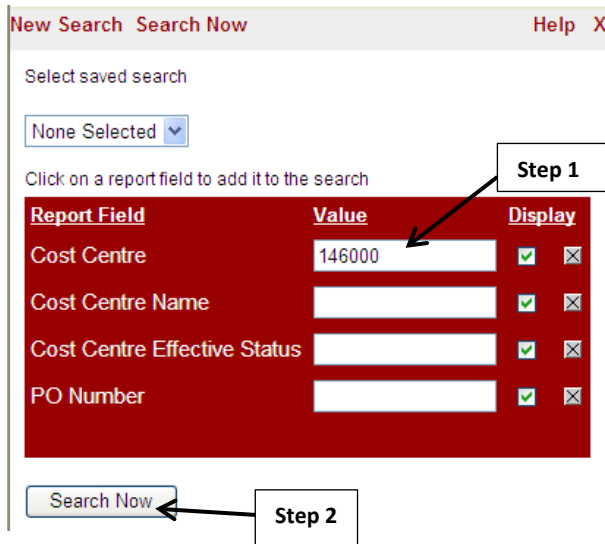
To locate **searchable fields** in the report, you can move your cursor over the data contained in fields within the report. If the cursor turns into a pointing hand icon 🖑, you can search on that field.

Click on the data to insert its **field label** into the search frame. If you click on data in the same field again, that field will be *removed* from the Search pane.

Step 4: Click on and drag the vertical grey bar that separates the Search pane from the Report pane to resize the Search pane so that you can see all of the items in it.

Enter Criteria & Conduct a Search

Step 1: Type **146000** into the Value field for Cost Centre to enter a criterion for the Cost Centre.

Step 2: Click the **Search Now** button to return the entries for Cost Centre 146000.

Smart Search found 6 matches.

Results 1 - 6

Cost Centre	Cost Centre Name	Cost Centre Effective Status	PO Number
146000	Cost Centre 146000	ACTIVE	1200053141
146000	Cost Centre 146000	ACTIVE	1200053342
146000	Cost Centre 146000	ACTIVE	1300051716
146000	Cost Centre 146000	ACTIVE	1300054646
146000	Cost Centre 146000	ACTIVE	P00001117
146000	Cost Centre 146000	ACTIVE	P00001546

Step 3: Click on the link for **PO Number 1200053141** in the search results to go to the page in the report which contains that data.

Fund Code :200   Cost Centre :146000   Cost Centre 146000

Start Date : 1/1/1960   End Date : 12/31/2099

Cost Centre Status :ACTIVE

Purchase Order Status

Fiscal Year : 2013

Purchase Order #	Reference Number	Type	Date	Status	Vendor	Chng Order Num	Last Voucher Date
1200053141	1310492500	Project	2011-07-15	Dispatched	Vendor 1200053141	0	2012-01-03
1200053342	1308256000	Project	2011-08-26	Dispatched	Vendor 1200053342	4	2012-11-21
1300051716		Blanket	2012-05-09	Dispatched	Vendor 1300051716	0	2012-10-09
1300054646	1344954223	General	2012-08-21	Dispatched	Vendor 1300054646	0	2012-08-29
P00001117	33922960	General	2012-11-05	Dispatched	Vendor P00001117	0	2012-11-06
P00001546	35069932	General	2012-11-28	Dispatched	Vendor P00001546	0	

Start a New Search

New Search   Step 2   Help

Smart Search found 6 matches.

Results 1 - 6

Cost Centre	Cost Centre Name	Cost Centre Effective Status	PO Number
146000	Cost Centre 146000	ACTIVE	1200053141
146000	Cost Centre 146000	ACTIVE	1200053342
146000	Cost Centre 146000	ACTIVE	1300051716
146000	Cost Centre 146000	ACTIVE	1300054646
146000	Cost Centre 146000	ACTIVE	P00001117
146000	Cost Centre 146000	ACTIVE	P00001546

Results 1 - 6

New Search   Step 1

Analyze Results

Step 1: Click the   New Search   button at the bottom of the search pane to return to the original search screen.

Step 2: Click the   New Search   link at the top of the search pane to remove all of the fields and criteria to begin a new search.

Use Search Expressions

Step 1: Click on any data in the following fields to enter the fields into the search pane.

- Cost Centre
- Vendor Name
- PO Number
- PO Amount

Step 2: Type the following in the Value field for the Vendor Name: ***19***.

Step 3: Click the [Search Now] button to returns all vendor names with "19" anywhere in the name.

Step 4: Click the [New Search] button at the bottom of the search pane to return to the original search screen.

Step 5: Select the text in the Vendor Name field and press **Delete**.

Step 6: In the report, click on data anywhere in the Date field in the Purchase Order Status report to add the date field to the search window.

Step 7: Type the following into the PO Date field: **"2012-05-15".**

Hyphens normally have a special meaning in a search. Include the quotation marks to treat the hyphens as regular text**.**

Step 8: Click the Search Now button.

Step 9: Try the same search again but without the quotation marks around the date. What happens?

Without the quotation marks, eReports treats the date as an attempt to search for a range of values, and your search has no valid results.

The two tables below illustrate frequently used operators and wildcards in search expressions, examples and returned values when using the combinations of operators and wildcards.

Operators		Example	Matches
=	Equal to. *By default,= is implied; it may be left out.*	=MR1500 MR1500	MR1500
>	Greater than, or alphabetically after	>100 >A	101,102,103 B,C etc.
<	Less than, or alphabetically before	<100 <C	1,2,3…99 A,B
>=	Greater than or equal to	>=100 >=A	100,101,102 etc. A,B,C etc.
<=	Less than or equal to	<=3 <=C	1,2,3 A,B,C
-	Range of values. *A hyphen separates the upper and lower limits of a range.*	1-3 A-C	1,2,3 A,B,C
,	Or. *The comma separates two distinct values.*	1,3 A,B	1, 3 A,B
!	Not	!1	All values *except* 1

Expressions start with a symbol called an **operator** that tells eReports how to compare the data in the report to the values in your search expression. If there is no operator entered, the equals sign is assumed.

Wildcard Characters		Example	Matches
?	Matches any one alphanumeric character	M?1680	MR1680, MS1680
*	Matches any number of alphanumeric characters	3M*	3MA100, 3M200
#	Matches any number (0-9)	MS##90	MS0190, MS1390 *(but not MSAB90)*

Expressions may also include **wildcards**: special characters that stand in for letters or numbers in positions where you don't know the character you need to match. For example, the expression "=Thom*" in a last name field will find all names that begin with the letters Thom followed by zero or more characters: Thom, Thomas, Thompson and Thomson.

Remove or Hide Search Fields

To **remove a field** from the Search, click the ☒ button under the Display column.

You may wish to use some fields in order to get the results you want, but not display the result in each line of the search results—to hide the column but still use the criteria, click on the checkbox ☑ under the Display column. In the example below, the Cost Centre criterion will be used to conduct the search, but the Cost Centre number will *not* be repeated in each row of the search results.

Report Field	Value	Display	
Cost Centre	146000	☐	☒
PO Number		☑	☒
PO Amount	>=2000	☑	☒
PO Date		☑	☒

Search Multiple Fields

When searching on multiple fields, the implication is that you are searching for all criteria: an AND search. The search above looks for two criteria: **cost centre 146000**, and **PO amounts greater than or equal to $2000**. Only data that matches *both* criteria will be returned.

Please follow the steps below to search for data with multiple criteria.

Step 1: Click the [New Search] button to return to the search criteria screen.

Step 2: Click ☒ under the **Display** column for the **Vendor Name** field to remove **Vendor Name** from search criteria.
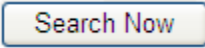
Click on a report field to add it to the search

Report Field	Value	Display	
Cost Centre	146000	☑	☒
Vendor Name		☑	☒
PO Number		☑	☒
PO Amount	>=2000	☑	☒
PO Date	2012-05-15	☑	☒

Step 4

Step 2

Step 5

Step 3

[Search Now]

Step 6

Step 3: Select the data in the **PO Date** field and press **Delete**.

Step 4: Type **146000** in the **Cost Centre** value field.

**Step 5:** Type **>=2000** in the **PO Amount** value field.

Step 6: Click the [Search Now] button to search for POs with the given criteria.

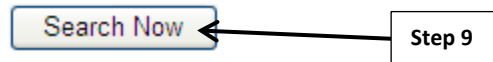**Step 7:** Click the [New Search] button to return to the search criteria screen.

Results 1 - 4

Cost Centre	PO Number	PO Amount	PO Date
146000	1200053141	115802.40	2011-07-15
146000	1200053342	46106.16	2011-08-26
146000	1300051716	12407.40	2012-05-09
146000	1300054646	115802.40	2012-08-21

Results 1 - 4

[New Search] ← **Step 7**

[Analyze Results]
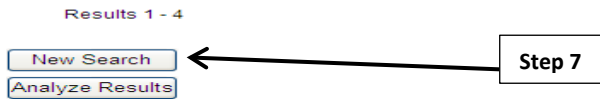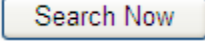
Step 8: Uncheck the Cost Centre field ☑.

Click on a report field to add it to the search

Report Field	Value	Display
Cost Centre	146000	☐ ☒
PO Number		☑ ☒
PO Amount	>=2000	☑ ☒
PO Date		☑ ☒

[Search Now] ← **Step 9**

Step 9: Click the [Search Now] button to conducts the same search but does not display the cost centre in each row.

Smart Search found 4 matches.

Results 1 - 4

PO Number   PO Amount   PO Date

1200053141   115802.40   2011-07-15
1200053342   46106.16   2011-08-26
1300051716   12407.40   2012-05-09
1300054646   115802.40   2012-08-21

Results 1 - 4

New Search

Analyze Results

Export Search Results
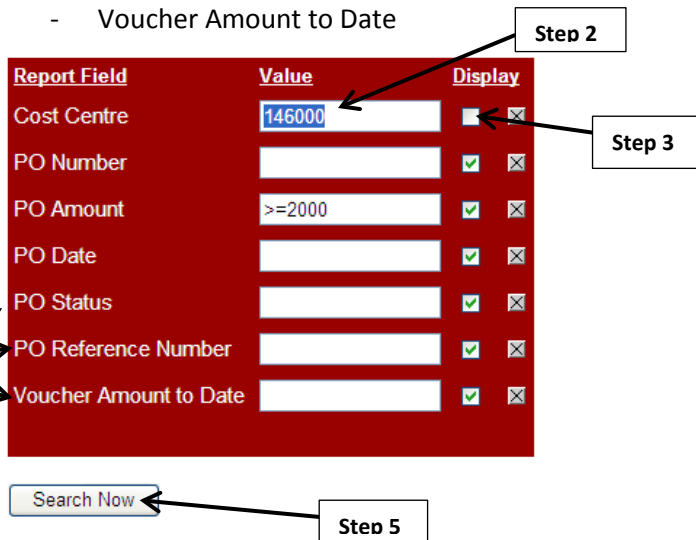
Step 1: Click the ⟨ New Search ⟩ button to return to the search criteria screen.

Step 2: Select the data in the **Cost Centre** field and press **Delete**.

Step 3: Click the Display checkbox 🗹 for the **Cost Centre** field.

Step 4: Add the following three more report fields to the search pane:

-   Status
-   Reference Number
-   Voucher Amount to Date
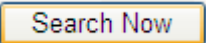
Report Field	Value	Display	
Cost Centre	146000	☐	☒
PO Number		☑	☒
PO Amount	>=2000	☑	☒
PO Date		☑	☒
PO Status		☑	☒
PO Reference Number		☑	☒
Voucher Amount to Date		☑	☒

Step 2

Step 3

Step 4

Search Now

Step 5

Step 5: Click the ⟨ Search Now ⟩ button to conduct the search.

Step 6: Scroll to the bottom of the search results.

| 110450 | P00000738 | 15980.15 | 2012-10-10 | Dispatched | 33058047 |

Results 1 - 20 **>>Next**

New Search

Analyze Results   Step 7

Download search results as: Step 8
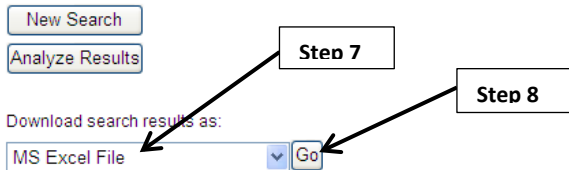
MS Excel File   Go

Step 7: Verify that **MS Excel File** is selected under "Download search results as:"

Step 8: Click on **Go** button to open the File Download dialogue

File Download

Do you want to open or save this file?

Name: Purchase Order Status.xls   Step 9
Type: Microsoft Excel Worksheet
From: **ereports.uit.yorku.ca**

Open   Save   Cancel

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?
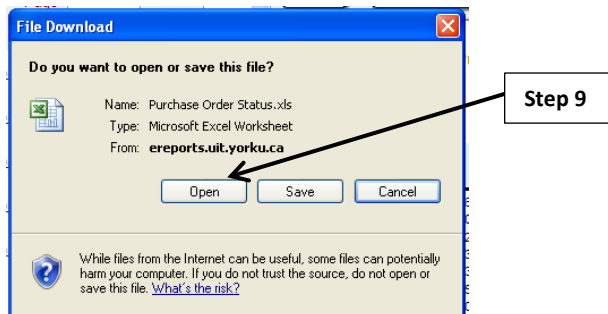
Step 9: Click the **Open** button to open the search results in Excel.

Cost Centre	PO Number	PO Amount	PO Date	PO Status	PO Reference Number	Voucher Amount to Date
110000	1200053638	7544.56	2011-11-21	Dispatched	1321555716	6982.47
110000	1200054098	27233.22	2012-04-09	Dispatched	1331730029	19032.64
110001	1300054210	3398.76	2012-05-15	Dispatched	1337001372	2654.22
110001	1300054380	4686.32	2012-06-25	Dispatched	1337001372	4686.33
110001	1300054381	2776.78	2012-06-25	Dispatched	1337001372	2677.42
110001	1300054513	6526.74	2012-07-27	Dispatched	1337001372	3913.55
110001	1300054526	6892.72	2012-07-31	Complete	1337001372	0.00
110001	1300055950	6892.72	2012-11-26	Dispatched	1337001372	4110.42
110070	1300054501	3093.41	2012-07-26	Dispatched		0.00

Data can now be analyzed by using all functions available in Excel spreadsheet format.

Step 10: Click on the Search button on the navigation toolbar to close the search window.

Exporting and Printing Reports

Exporting and Printing Reports

Step 1: Load the Purchase Order Status report for fund 200 by following steps 1 - 4 in pages 19 – 20.

Step 2: Click the ⟨**Export/Print**⟩ button on the report navigation bar to open the Export/Print options dialog box.
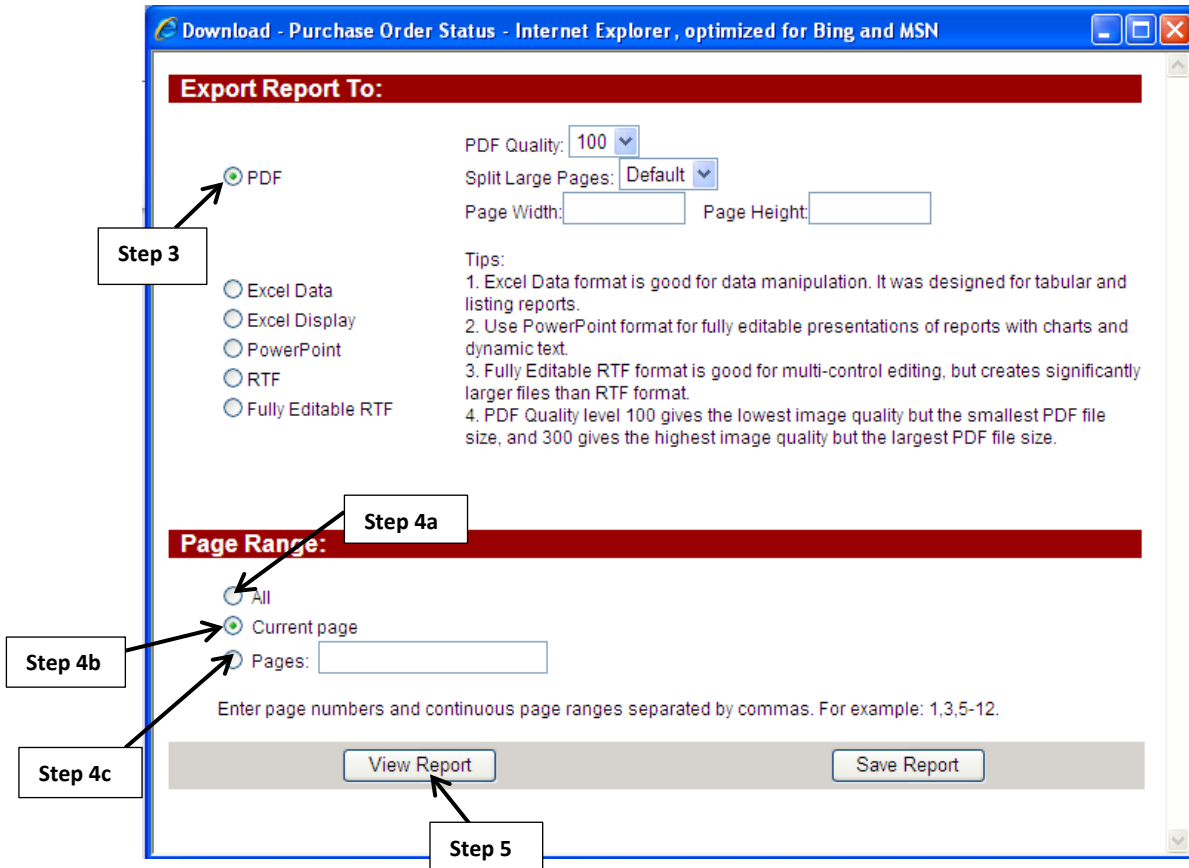
Step 3: Click the radio button for the **PDF** option under the section **Export Report To:**

Step 4: Select a **Page Range**

   a. Click the **All** radio button to allow for all pages to be entered for printing
   b. Click the **Current page** radio button to allow for current page to be entered for printing
   c. Click the **Pages** radio button and type **1-2** in the **Pages** box to allow for page **1-2** to be entered for printing

Step 5: Click the **View Report** button to load the PDF file into a web browser window

Step 6: Report can now be saved into PDF file as soft-copy or print as hard-copy for record keeping purpose.

Step 7: Close the browser window to return to the Pint/Export window in eReports.

PrintPacks

If you have to generate very large reports or many reports at once, you may want to look into the PrintPack application within eReports. PrintPacks that you request are processed 4 times per day:

1) 12:15PM,
2) 2:30PM,
3) 4:45PM,
4) 8:00PM.
The reports are returned in PDF format suitable for saving or printing.

Five report types are available as PrintPacks: Statement of Operations, Transaction Details, Internal Grant, Allocation Bridging Summary and Telecommunications Details. PrintPack reports are automatically collated by Cost Centre.

If you cannot see the PrintPack tab in your own eReports navigation bar, it means that you haven't been granted access to this feature yet. Please send your request to askit@yorku.ca through your manager or Financial Officer or Executive Officer.

Request a PrintPack

Use the PrintPack tab on the main navigation bar to open the PrintPack page. Fill in the options on the left to indicate the Month, Year, Fund, and reports that you want to package. It's also a good idea to give your PrintPack a specific name. When done, click the **Submit Request** button.

Now wait! The PrintPack request will be placed in a queue. Normally, PrintPacks are ready on the next business day.
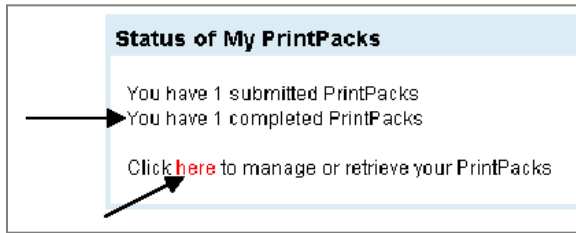
Retrieve a PrintPack

On the right side of the PrintPack page you'll find a Status window that summarizes the current status of your submissions: how many jobs have been submitted (i.e., are pending), and how many are completed and ready to retrieve.

To see more detail or to retrieve completed jobs, click on the "here" link in the status window.

Manage My PrintPacks window will appear with the details of your completed and pending jobs. The example below shows one job ready for retrieval and one that has been submitted but not yet completed.

- You can **Delete** completed jobs or **Cancel** pending ones.

- Click on the magnifying glass 🔍 to view the details of the PrintPack job.

- Click **Download** to retrieve the PDF file for completed PrintPack jobs.