

Turning on Interactive Viewer

You can export a report without customizing it. However, if you wish to customize your report, you'll need to turn on Interactive Viewer. To turn on the viewer:

1. First, ensure you select **New Version** from the **Report Version** dropdown, add in your report parameters, then click **Fetch Report**.

2. *Optional:* Once your report opens, you may wish to select the **Raw data view** option. This may not be available for all reports.

Fiscal Year	Date	Account Description	Source	Journal / PO / Voucher ID	Journal Ref / Invoice #	PO Reference	Vendor / Reference	Budget Amount	Transaction Amount
Revenue Accounts									
033000		ICR Sal Wages							
2023	05/20/2022	ICR Sal Wages	BU	BU00833802	BU3024		BU3024	61,488.00	-
2023	04/28/2023	Tb KimK upgrade project	ULC	000081381			711130	-	(287.02)
Total - 033000 - ICR Sal Wages								61,488.00	(287.02)

3. **Enable Interactivity** by opening the **Main Menu** (hamburger icon in the top-left of your screen).
4. Click **Enable Interactivity**.

Fiscal Year	Account Type	Account	Account Description	Date	Transaction Line Description	Source				
2022	Expense	486600	Equip Computer-Under \$20,000	04/11/2022	1x laptop SR666160	ULC				
2022	Expense	486600	Equip Computer-Under \$20,000	04/11/2022	1x deck SR666160	ULC				
2022	Expense	240100	Ben Ft Support Staff Yusa	02/24/2022	Tb MileyC payment	ULC				
2022	Expense	140100	Sal Ft Support Staff Yusa	02/24/2022	Tb MileyC payment	ULC				
2022	Expense	455000	Computer Software-License Fee	04/28/2022	INC673314 SEP	ULC				
2022	Expense	455000	Computer Software-License Fee	04/28/2022	INC673318 Res Grad	ULC				
2022	Expense	455000	Computer Software-License Fee	04/28/2022	License Fee	ULC				
2022	Expense	455000	Computer Software-License Fee	04/28/2022	License Fee	ULC				
2022	Expense	455000	Computer Software-License Fee	04/28/2022	SMS xl	ULC				
2022	Expense	455000	Computer Software-License Fee	04/28/2022	INC629644 Science x2	ULC				
2022	Expense	455000	Computer Software-License Fee	04/28/2022	INC613201 HR x7	ULC				
200	230087	Demo 230087	Swift,Taylor	2023	Expense	140000	Sal Ft Support Staff-CPM	05/20/2022	Sal Ft Support Staff-CPM	BU


Exporting Content

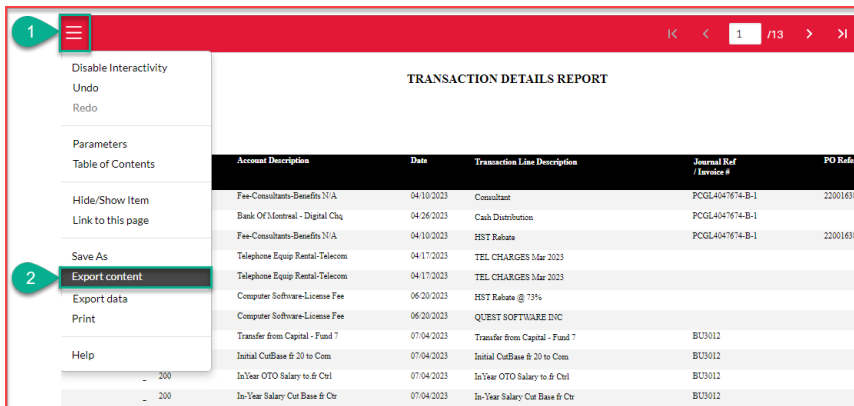
The **Exporting Content** option allows you to export your eReport into the following formats:

- Excel (XLSX)
- Macro-enabled Excel (XLSM)
- PDF
- PostScript (PS)
- PowerPoint (PPTX)
- Word (DOCX)
- XHTML

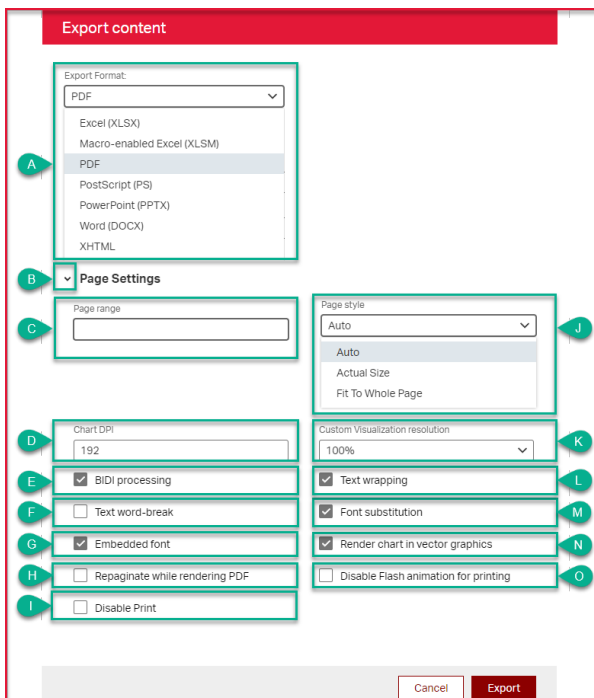
This feature enables you to archive, present and share reports with ease.

To export content:

1. Click the **Main Menu** icon  in the top-left corner of your report.
2. Choose the **Export content** option.



This will open the **Export content** window:



3. Follow the actions listed in the table below:

	Setting	Description	Action
a	Export Format	The dropdown menu where you select the desired format for the export, such as PDF, Excel, Word, etc.	Select PDF
b	Page Settings Dropdown	The dropdown menu where you select the desired format for the export, such as PDF, Excel, Word, etc.	Open the dropdown
c	Page range	This field is where you would specify which pages of the document you want to export or print. You can enter a single page number, a range (e.g., 1-5), or multiple separate ranges (e.g., 1-3, 5, 7-10).	Leave blank
d	Chart DPI	DPI stands for "dots per inch," and it's a measure of images' resolution, specifically for charts. A higher DPI means more dots per inch, translating to a higher-resolution, more detailed image.	Keep as is
e	BIDI processing	BIDI stands for bidirectional text. This option ensures that text containing both left-to-right (like English) and right-to-left (like Arabic or Hebrew) languages is processed correctly, maintaining the proper order and direction of the text within the document.	Keep checked
f	Text word-break	This setting controls how words are broken at the end of lines. If a word does not fit at the end of a line, it decides whether it should be hyphenated and continued on the next line, or moved to the following line.	Leave unchecked
g	Embedded font	This includes the fonts used in the document within the exported file. Embedding fonts ensures that the text will display with the correct typography, even if the viewing system does not install the same fonts.	Keep checked
h	Repaginate while rendering PDF	This option means that the pagination of the document will be recalculated, or "repaginated," during the PDF creation process. This can affect the layout and the flow of text and objects from one page to another.	Leave unchecked
i	Disable Print	This refers to a security setting that would prevent the resulting PDF from being printed out from a PDF reader.	Leave unchecked
j	Page style	This dropdown allows you to select the style or layout for the pages.	Set to "Auto"
k	Custom Visualization resolution	This dropdown would allow you to choose the resolution for visual elements like graphs or charts within the document. "100%" means that visualizations will be exported at their original size and quality.	Keep at 100%
l	Text wrapping	This allows text to flow or "wrap" around embedded objects or images rather than overlaying or ignoring them. It ensures	Keep checked

		that the text appears next to such elements in a visually appropriate manner.	
m	Font substitution	If the document uses fonts that are not embedded and are also not available on the system performing the export, this option allows the system to replace or substitute missing fonts with similar ones that are available.	Keep checked
n	Render chart in vector graphics	This ensures that any charts included in the document are exported as vector graphics, which retain high quality when scaled or printed, rather than as raster images, which can pixelate when enlarged.	Keep checked
o	Disable Flash animation for printing	This option would remove any Flash-based animations when the document is printed.	Keep unchecked

4. Click **Export**

Your PDF will look something like this:

TRANSACTION DETAILS REPORT											
Fund Code: 200 Date Range: 01/01/2023 to 06/30/2023 Cost Center: 230642, 230087											
Transaction Amount	Fund Code	Cost Centre Manager	Fiscal Year	Account	Account Description	Date	Transaction Line Description	Source	PO Reference	Vendor / Reference	Budget Amount
\$10,781.2	200	Swilt,Taylor	2023	197001	Fee-Consultants-Benefits N/A	04/10/2023	Consultant	AP	2200618944	The Walt Disney Compu	-
-	200	Swilt,Taylor	2023	000114	Bank Of Montreal -Digital Ch	04/26/2023	Cash Distribution	AP		The Walt Disney Compu	-
-\$10,781.2	200	Swilt,Taylor	2023	197001	Fee-Consultants-Benefits N/A	04/10/2023	HST Rebate	AP	2200618944	The Walt Disney Compu	-
-\$905.43	200	Swilt,Taylor	2023	467000	Telephone Equip-Rental-Telc	04/17/2023	TEL CHARGES Mar 2023	TEL		TEL	-
\$174.77	200	Swilt,Taylor	2023	467000	Telephone Equip-Rental-Telc	04/17/2023	TEL CHARGES Mar 2023	TEL		TEL	-
\$273.04	200	Swilt,Taylor	2024	455000	Computer Software-License F	06/20/2023	HST Rebate @ 73%	PUR		FERRY, MATT	-
-\$335.01	200	Swilt,Taylor	2024	455000	Computer Software-License F	06/20/2023	QUEST SOFTWARE INC	PUR		FERRY, MATT	-
\$3,989.02	200	Swilt,Taylor	2024	092500	Transfer from Capital - Fund 7	07/04/2023	Transfer from Capital- Fund 7	BU		BU0302	298,151.25
-	200	Swilt,Taylor	2024	099610	Initial CutBack # 20 to Com	07/04/2023	Initial CutBack # 20 to Com	BU		BU0302	377,949.47
-	200	Swilt,Taylor	2024	099504	In-Year OTD Salary to Fr Ch	07/04/2023	In-Year OTD Salary to Fr Ch	BU		BU0302	8674.34
-	200	Swilt,Taylor	2024	099505	In-Year Salary Cut Base # Cr	07/04/2023	In-Year Salary Cut Base # Cr	BU		BU0302	2,497.33
-	200	Swilt,Taylor	2024	099912	In-Year OTD to Fr W/InFacDep	07/04/2023	In-Year OTD to Fr W/InFacDep	BU		BU0302	585,600.00
-	200	Swilt,Taylor	2024	099912	In-Year OTD to Fr W/InFacDep	07/04/2023	In-Year OTD to Fr W/InFacDep	BU		BU0302	732,000.00
-	200	Swilt,Taylor	2024	099610	Initial CutBack # 20 to Com	07/04/2023	Initial CutBack # 20 to Com	BU		BU0302	407,648.20
-	200	Swilt,Taylor	2024	099504	In-Year OTD Salary to Fr Ch	07/04/2023	In-Year OTD Salary to Fr Ch	BU		BU0302	8,438.41
-	200	Swilt,Taylor	2024	099505	In-Year Salary Cut Base # Cr	07/04/2023	In-Year Salary Cut Base # Cr	BU		BU0302	10,356.85


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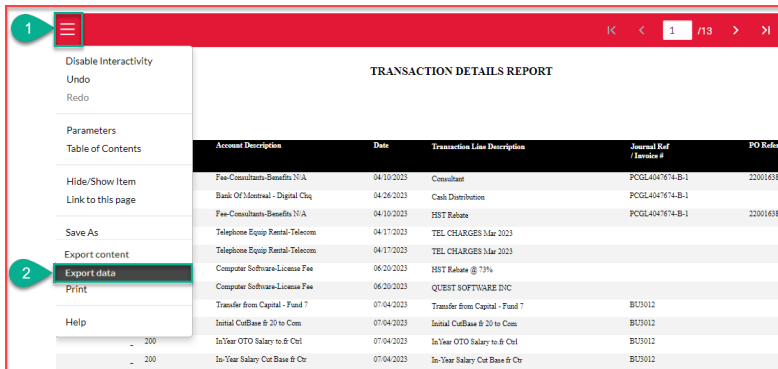
1: Click to view in Adobe.

Exporting Data

Exporting data is the cleanest way to move your report to Excel. It gives you control over what data gets moved and how it is formatted.

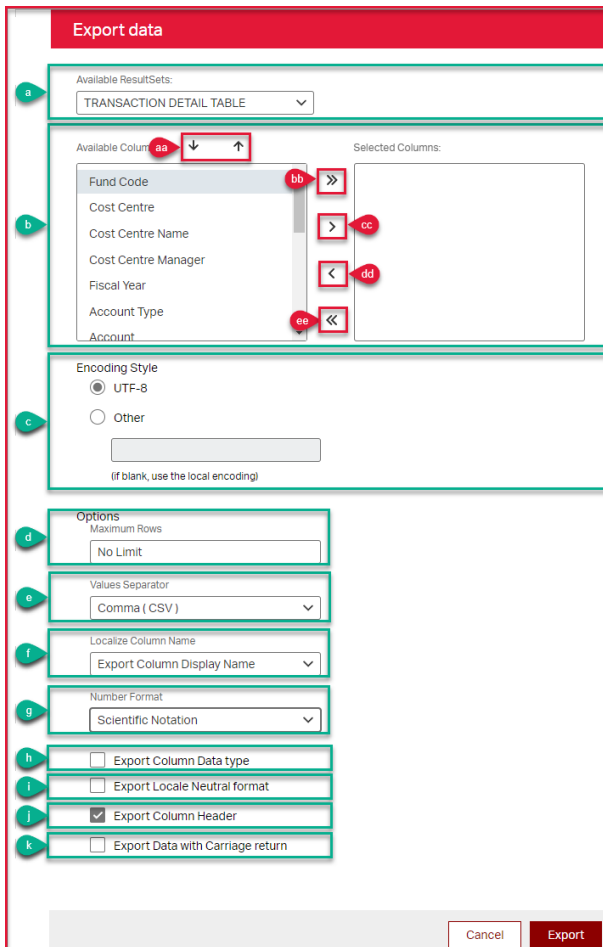
To export data:

1. Click the **Main Menu** icon  in the top-left corner of your report.
2. Choose the **Export data** option.



Account Description	Date	Transaction Line Description	Journal Ref / Invoice #	PO Reference
Fee-Consultants-Benefits 10/A	04/10/2023	Consultant	PCGL40474-B-1	220016384
Bank OF Montreal - Digital Chq	04/26/2023	Cash Distribution	PCGL40474-B-1	
Fee-Consultants-Benefits 10/A	04/10/2023	HST Rebate	PCGL40474-B-1	220016384
Telephone Equip Rental-Telecom	04/17/2023	TEL CHARGES Mar 2023		
Telephone Equip Rental-Telecom	04/17/2023	TEL CHARGES Mar 2023		
Computer Software-License Fee	06/20/2023	HST Rebate @ 73%		
Computer Software-License Fee	06/20/2023	QUEST SOFTWARE INC		
Transfer from Capital - Fund 7	07/04/2023	Transfer from Capital - Fund 7	BU7012	
Initial CntBase @ 20 to Com	07/04/2023	Initial CntBase @ 20 to Com	BU7012	
In-Year OTO Salary to @ Cnt	07/04/2023	In-Year OTO Salary to @ Cnt	BU7012	
In-Year Salary Cnt Base @ Chr	07/04/2023	In-Year Salary Cnt Base @ Chr	BU7012	

This will open the **Export content** window:



Export data

Available ResultSets:
TRANSACTION DETAIL TABLE

Available Columns: Fund Code, Cost Centre, Cost Centre Name, Cost Centre Manager, Fiscal Year, Account Type, Account

Selected Columns:

Encoding Style:
 UTF-8
 Other

Options:
Maximum Rows: No Limit
Values Separator: Comma (CSV)
Localize Column Name: Export Column Display Name
Number Format: Scientific Notation
 Export Column Data type
 Export Locale Neutral format
 Export Column Header
 Export Data with Carriage return

Cancel Export

3. Follow the actions listed in the table below:

	Setting	Description	Action
a	Available ResultSets	Dropdown to select the data set from which to export data.	Keep as is.
b	Available/Selected Columns	Interface to select the columns to be exported.	Select your desired columns using the Move One/All options listed below.
aa	Sort Alphabetically Ascending/Descending	Arrows to sort your columns by alphabetical order	Keep as is.
bb	Move All Right	Button to move all columns to the Selected list.	Use to select all columns for data export.
cc	Move One Right	Button to move the highlighted column to the Selected list.	Use to move individually selected columns for data export.
dd	Move One Left	Button to move the highlighted column back to the Available list.	Use to deselect an individually selected column from data export list.
ee	Move All Left	Button to move all columns back to the Available list.	Use to deselect all column from data export list.
c	Encoding Style	UTF-8 is a common encoding that includes a wide array of characters from various languages, while the "Other" option allows for different encodings.	Keep UTF-8 selected
d	Maximum Rows	Option to set a limit on the number of rows to be exported.	Keep No Limit selected
e	Values Separator	Dropdown to select the character for separating values in the export file.	Keep CSV selected
f	Localize Column Name	Dropdown to select how column names should be handled in the export.	Keep Export Column Display Name selected
g	Number Format	Dropdown to select the number format for the exported data.	Keep Scientific Notation selected
h	Export Column Data type	Checkbox to include the data type of each column in the export.	Leave unchecked
i	Export Locale Neutral format	Checkbox to ensure the exported data is in a locale-neutral format.	Leave unchecked

j	Export Column Header	Checkbox to include column headers in the exported file.	Keep checked.
k	Export Data with Carriage return	Checkbox to include a carriage return character at the end of each line in the exported file.	Leave unchecked

4. Click **Export**

Video Tutorial

Check out our video tutorial for a more detailed look into modifying columns using the new eReports:



Use the link if you have trouble accessing the video: <https://youtu.be/p56aBSnKyE>