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# Turning on Interactive Viewer

Before you begin applying conditions and formatting, ensure you turn on the **Interactive 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
2023	05/20/2022	ICR Sal-Wages	BU	BU00833802	BU3024		BU3024	61,488.00	-
2023	04/28/2023	T&M KinK upgrade project	ULC	0000847381			771130	-	(287.02)
<b>Total - 033000 - ICR Sal-Wages</b>								<b>61,488.00</b>	<b>(287.02)</b>

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

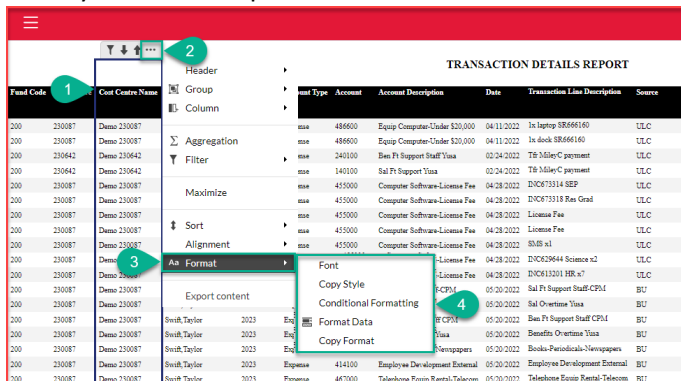
4. Click **Enable Interactivity**.

Manager	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 dock SR666160	ULC
	2022	Expense	240100	Ben Ft Support Staff Yusa	02/24/2022	T&M MileY payment	ULC
	2022	Expense	140100	Sal Ft Support Staff Yusa	02/24/2022	T&M MileY 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 x1	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
	2023	Expense	140000	Sal Ft Support Staff-CPM	05/20/2022	Sal Ft Support Staff-CPM	BU

## Formatting Options

In this section, we will cover all the different formatting options. Before you begin, ensure you've followed the steps [to turn on the interactive viewer](#):

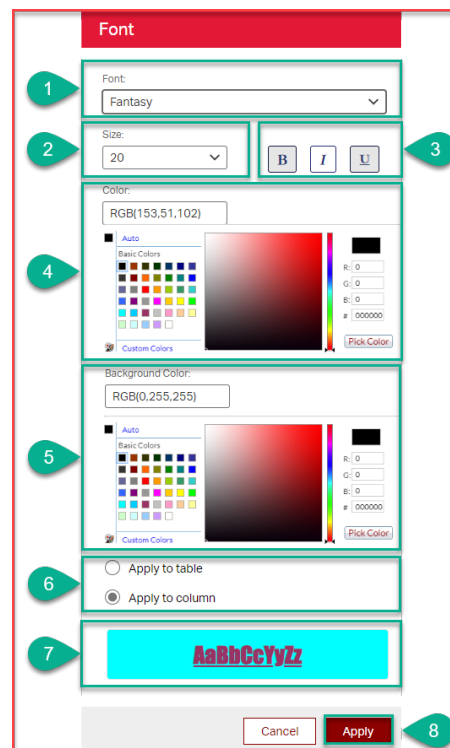
1. Select a column.
2. Click the **ellipsis** icon (...) from the interactive viewer menu.
3. Open the **Format** dropdown.
4. Select your **Format** option.



## Font

Selecting the **Font** option will open the **Font Window**, allowing you to edit a column or the entire table:

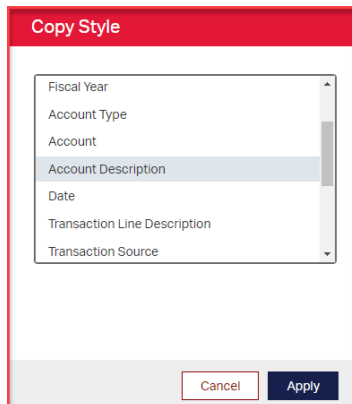
1. **Font**: allows you to choose a font from a dropdown of dozens of options.
2. **Size**: allows you to customize the font size of your column or table.
3. **B/I/U**: the bold, italic, and underline options work much as they do in Word or Excel, allowing you to enhance the text of your column or table.
4. **Colour**: allows you to change the font colour
5. **Background Colour**: allows you to change the cell colour. Remember to keep accessibility in mind when choosing colours.
6. **Apply to Table/Column**: **Apply to Column** allows you to apply your desired font changes to the selected column. **Apply to table** applies the changes to the entire table.
7. **Preview**: generates a preview of how your changes will appear.
8. **Apply**: allows you to apply your changes to your column or table.



## Copy Style

**Copy Style** allows you to copy the format changes of one column and apply them to another, which is helpful if you want several columns to stand out without formatting the entire table or repeating manual steps.

1. Select a previously-formatted column; if the selected column has no custom formatting, you won't have anything to copy.
2. Select **Copy Style** from the **Format** dropdown.
3. Select the column(s) you'd like to apply your copied format to. You can hold **Shift** or **CTRL** to select multiple columns at one time.
4. Click **Apply**.

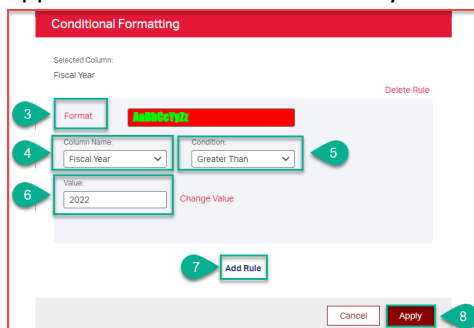


The 'TRANSACTION DETAILS REPORT' table shows columns for Fund Code, Cust Centre, Cust Centre Name, Cust Centre Manager, Fiscal Year, Account Type, Account, Account Description, Date, and Transaction Line Description. The 'Account Description' column is highlighted in red, and the 'Cust Centre Name' column is highlighted in blue. The 'Account Description' column contains text like 'Equin Computer-Under \$20,000' and 'Computer Software-License Fee'.

## Conditional Formatting

eReports' **Conditional Formatting** works much the same way it does in MS Excel.

1. Select any column to open the **Interactive Viewer** menu.
2. Select **Conditional Formatting** from the **Format** dropdown.
3. Click **Format** to open the **Font** window. This is how you will add the formatting that will be applied to the values that meet your chosen condition.



4. **Column Name:** allows you to select the column you wish to apply the conditional formatting to.
5. **Condition:** enables you to select the condition to apply to your column.
6. **Value:** allows you to type in the value or criteria your condition will be applied to.
7. **Add Rule:** You can use the **Add Rule** button to add another conditional formatting rule.
8. **Apply:** will apply the conditional formatting to your column.

## Format Data

Format Data allows you to format numerical data into recognized formats like dates, percentages, etc. To format a column's data:

1. **Select a data column;** the feature won't work if you select a text column like **Cost Manager**.
2. Select **Format Data**.
3. **Format Number as:** allows you to select the number format you'd like to apply to your data column. For this example, we are choosing **Currency**.
4. **Symbol:** is unique to **Currency**; it asks you to choose which currency symbol you wish to apply to your column.  
**NOTE: This won't automatically calculate the exchange rate of the selected currency.**
5. **Symbol position:** also unique to currency, it allows you to select if you'd prefer the currency symbol to appear before or after the value.
6. **Decimal Places:** allows you to select how many decimal places your value will show.
7. **Use 1000s Separator:** allows you to choose whether your values will be comma-separated by 1000s. e.g., **1300.34** vs **1,300.34**.
- 8.
9. **Negative numbers:** allows you to choose whether negative numbers will be presented in parentheses or prefixed with a negative "-" symbol.
10. **Apply:** applies your formatting to the selected column.

Number column format

Format Number as:  
Currency  
Unformatted  
General Number  
Currency  
Fixed  
Percent  
Scientific  
Custom

Symbol:  
CA\$

Symbol Position:  
Before

Decimal Places:  
8

Use 1000s Separator

Negative Numbers:  
-1234.56  
-1234.56  
(1234.56)

Apply

## Copy Format

This feature allows you to copy a data format from one column to another or even multiple columns. Complete the [Format Data](#) section above for this example.

1. **Select a data column** with a data format already applied to it; the feature won't work if you select a text column like **Cost Manager**.
2. Select **Copy Data** from the **Format** dropdown.
3. Select the column(s) you'd like to apply the copied data to.
4. Click **Apply**.

Copy Format

Fiscal Year  
Transaction Amount

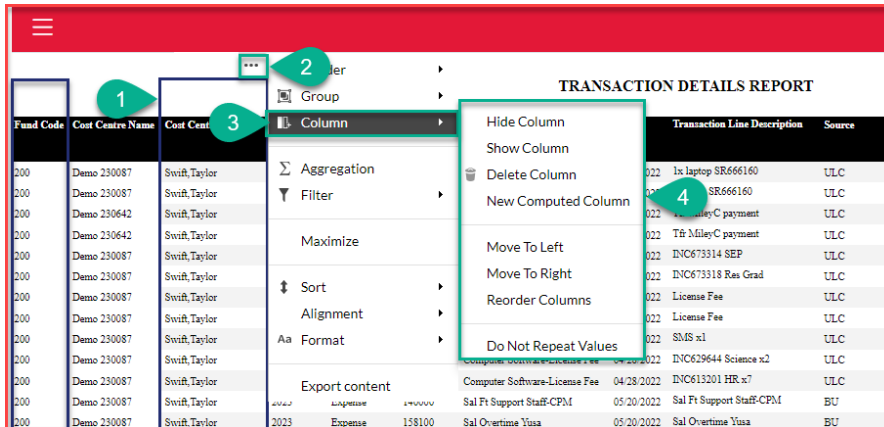
Cancel Apply

## Column Options

This section will cover all the different options for editing columns. Before you begin, ensure you've followed the steps above [to turn on the interactive viewer](#):

Once interactivity is turned on:

1. Select a column.
2. Click the **ellipsis** icon (...) from the interactive viewer menu.
3. Open the **Format** dropdown.
4. Choose a formatting option.



## Hide Columns

Allows you to hide columns in a report. This can help reduce the complexity of a report by removing extraneous data.

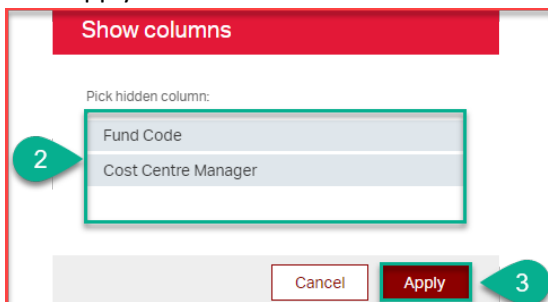
1. In this example, we'll select the **Fund Code** and **Cost Center** columns. You can select multiple columns by holding **CTRL** and clicking those columns.
2. Then select the **Hide Column** option to hide all the selected columns.

## Unhide Columns (Show Columns)

The **Show Column** feature will show/unhide your report's hidden columns.

To unhide columns:

1. Select any column and choose the **Show Column** option under **Column**.
2. On the **Show Columns** window, select the columns you want to unhide. You can select multiple by holding **Shift** or **CTRL** while you click.
3. Click **Apply**



## Delete Column

Deleting columns allows you to delete a column from your report. Note this will only delete it on your opened copy of the report—it will not delete the data from the eReports database.

To delete column(s):

1. Select the column(s) you want to delete. You can select multiple by holding **CTRL** while you click.
2. Choose the **Delete column** option from the **Column** dropdown in the interactive viewer menu.
3. Click **Continue**.

Your column(s) are now deleted. You can immediately click **Undo** from the main menu to re-add the columns.

## New Computed Column

This feature allows you to add new columns to your report. This powerful feature enables custom functions, much like Excel. In our example, we will forecast an inflation rate of 1.04%.

To add a custom Computed Column:

1. Select the column adjacent to where you want to add the computed column.
2. Select the **New Computed Column** option under **Column**.
3. In the **Column Label** field, type the name of your computed column. We are using "**Inflation**" in this example.
4. Select your desired category from the **Select Category** list; we are selecting **Math**.
5. In the **Select Function** list, click a function. To type an expression, click the **Advanced** category.
  - a. Information about your chosen function will appear below.
6. In the **Enter Expression** field, type your custom expression:
  - a. Reference any column using a square bracket "[" followed by the column's name.
  - b. Select a column; we are choosing **Transaction Amount**.
  - c. Next, add the multiplication symbol "\*" followed by the value **1.04**.
7. Click **Apply**.

The screenshot shows the 'New Computed Column' dialog box with the following fields and options:

- Column Label:** Inflation (Callout 3)
- Select Category:** Math (Callout 4)
- Select Function:** Advanced... (Callout 5)
- Enter Expression:** [TRANSACTION\_AMOUNT] \* 1.04 (Callout 6)
- Buttons:** Cancel, Apply (Callout 7)

A red arrow points to the 'Advanced...' option with the text: 'This option enables you to customize a function expression.'

Below the 'Enter Expression' field, a list of available columns is shown:

- [TRANSACTION\_DATE] - Date
- [TRANSACTION\_SOURCE] - Transaction Source
- [TRANSACTION\_AMOUNT] - Transaction Amount
- [TRANSACTION\_ID] - Journal / PO /oucher ID

## Move To Left/Right

This feature allows you to move a column to the left or the right of its current position.

To move a column:

1. Select the column you want to move.
2. Choose the **Move to Left** or **Right** to move the selected column in your desired direction.

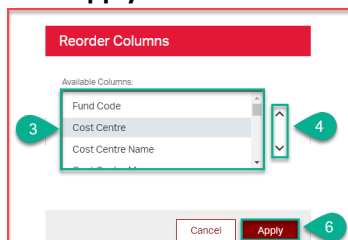
For more complex moves involving multiple columns, use the [Reorder Columns](#) option below.

## Reorder Columns

This feature allows you to rearrange multiple columns with only a few clicks.

To reorder columns:

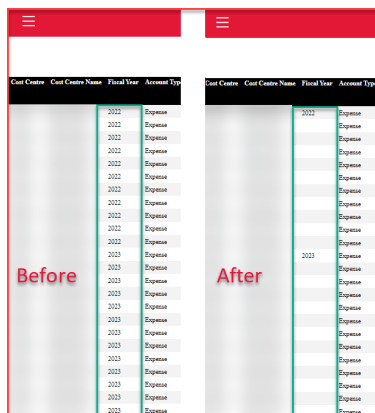
1. Select any column.
2. Choose the **Reorder column** option from the **Column** dropdown in the interactive viewer menu.
3. Select the column you'd like to move from the **Available Columns** list.
4. Use the up and down arrow keys to reorder the column as desired.
5. Repeat steps 2 & 3 as necessary.
6. Click **Apply**.



## Do Not Repeat Values

The **Do not Repeat Values** feature will remove any repeating values in a column, replacing them with blank cells instead.

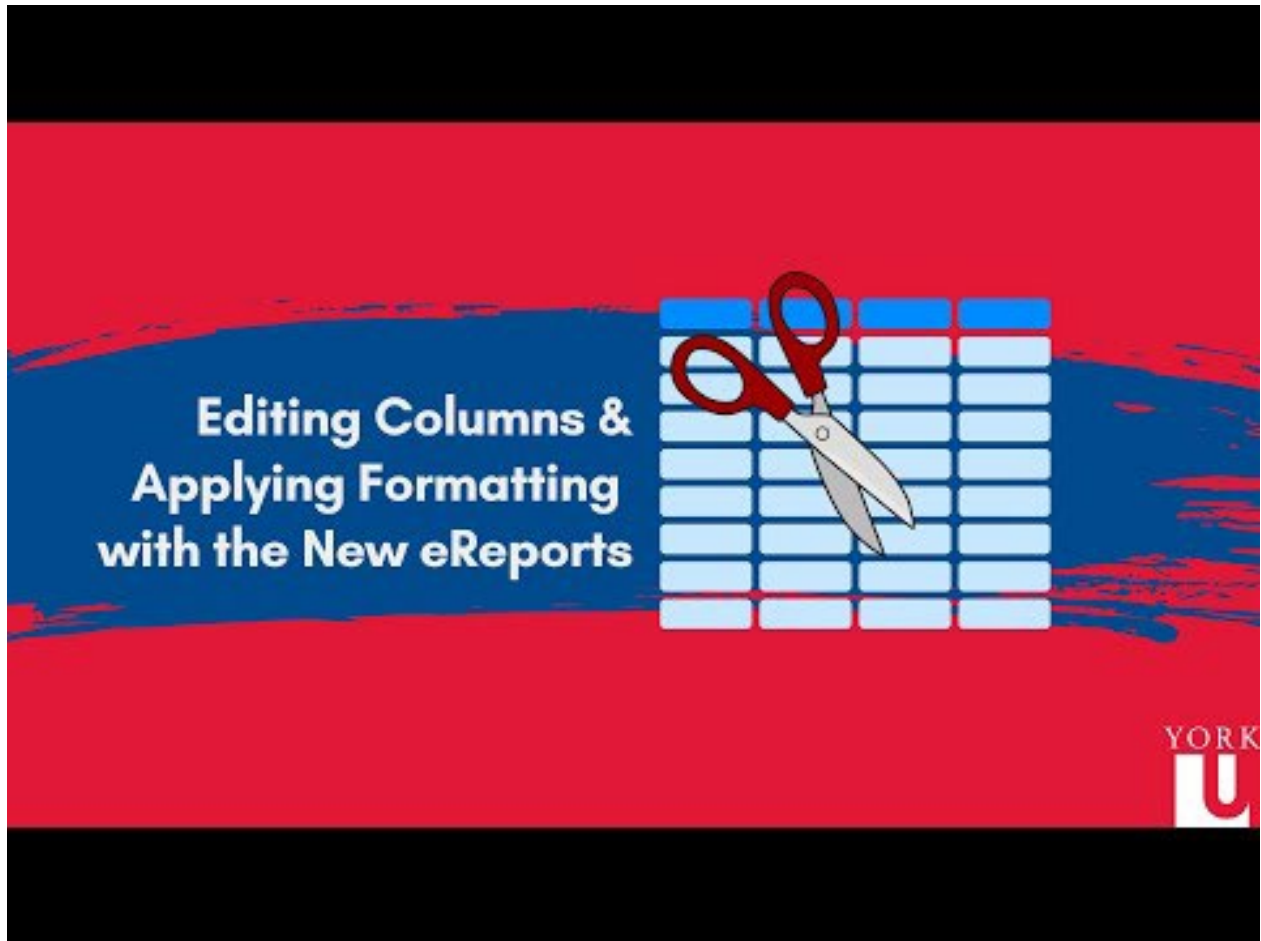
1. Select any column with repeating values.
2. Choose the **Do Not Repeat Values** option from the **Column** dropdown in the interactive viewer menu.





## 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://www.youtube.com/watch?v=gq1MkYrTS\\_E](https://www.youtube.com/watch?v=gq1MkYrTS_E).