

## HOW TO Assign or Delete FOAPALs/Assign or Delete Badge IDs associated to Users (uPrint)

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The Assign or Delete FOAPALs and uPrint card Badge IDs associated to Users menu allows the Key Financial Contact and uPrint Administrator(s) to:

1. **Assign FOAPALs**, that are within their Org jurisdiction, to Academic Staff and Administrative and Support Staff, and Casuals (non-student) or Externals (contract staff) who have a McGill ID number, for uPrint charges.
2. **Assign uPrint cards (Badge IDs)** to Casuals (non-student) or Externals (contract staff), who have a McGill Username, for uPrint charges.

Changes made using this menu (assigning/deleting/updating) will only **come into effect after the next data update period**. These occur daily (Monday to Friday, excluding holidays) at 6am, 10am, 1pm and 4pm.

*Note:* When the Key Financial Contact and uPrint Administrator(s) (*if applicable*) is **temporarily absent and a FOAPAL needs to be assigned** to a User, send your request to [itsupport@mcgill.ca](mailto:itsupport@mcgill.ca).

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### How to assign a FOAPAL to Academic Staff, Administrative and Support Staff and Casuals (non-student) or Externals (contract staff) who have a McGill ID number

**For Research Grants, please note the following:** You must have the **written authorization (email/memo)** of the Principal Investigator **prior** to assigning a FOAPAL through this menu. This authorization must be kept for a minimum of 7 years in the event of an audit.

1. Log in to [Minerva](#).
2. Go to the **Finance (Fund) Administration** menu.
3. Select the **uPrint Campus Printing** menu option.
4. Click on **Assign or Delete FOAPALs / Assign or Delete Badge IDs associated to Users**.

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McGill ID  Click the magnifier icon to search for a person. If nothing happens, you may already have

List

Fund Code  Click the magnifier icon to search for a code. If nothing happens, you may already have

Use the up/down arrows to re-order the display sequence. Use to edit or to delete.

**Tag Default Fund Organization Account Program Activity Location Term Date Order Action**

5. Enter the 9 digit ID number in the **McGill ID** field. Click on the magnifying glass icon if the McGill ID is not known.
6. Enter the 6 digit code in the **Fund Code** field.  
**Note:** A drop down list appears if you have access to less than 100 funds; otherwise a magnifying glass icon will appear.
7. Click on the **Assign FOAPAL** button.
8. By default, the **Fund** you entered in the previous screen along with the appropriate **Organization, Account and Program codes** will be displayed. These cannot be changed.

**Add a FOAPAL record**

- You may change Activity and Location codes, as required
- The default Activity code is '000000' - Unassigned Activity
- The default Location code is '000000' - Unassigned Location
- A user can assign a tag of up to 6 characters that is meaningful to them in order to easily identify the FOAPAL on the Xerox screen.
- There can only be one default FOAPAL
- The format of termination date is 'DD-MON-YYYY'

Click the magnifier symbol to search for a code. If nothing happens, you may already have an active Code Search window. Alt-tab to retrieve it.

|                         |                                     |                              |
|-------------------------|-------------------------------------|------------------------------|
| <b>Fund</b>             | 123456                              | Financial Services           |
| <b>Organization</b>     | 00123                               | Financial Services           |
| <b>Account</b>          | 700016                              | Photocopying (Cost Per Copy) |
| <b>Program</b>          | 1212                                | Support Serv. Finance        |
| <b>Activity</b>         | <input type="text" value="000000"/> | Unassigned Activity          |
| <b>Location</b>         | <input type="text" value="000000"/> | Unassigned Location          |
| <b>Default FOAPAL?</b>  | <input type="checkbox"/>            |                              |
| <b>Tag</b>              | <input type="text"/>                |                              |
| <b>Termination Date</b> | <input type="text"/>                |                              |

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9. You have the option to enter **Activity and Location codes**. If your Unit does not use these, leave as is - a series of six zeros '000000'.
10. If you would like this FOAPAL to be set up as the default for uPrint charges, check the **Default FOAPAL** box.  
*Note:* There can only be one default FOAPAL.
11. In the **Tag** field, you may enter any combination of characters (alphabetic and/or numeric) that will help to identify the FOAPAL to charge on the uPrint device Account screen. If left blank, the Fund-Activity-Location set of codes for the FOAPAL string will be displayed. No other textual description will appear on the uPrint device Account screen to identify the FOAPALs assigned to the user's profile.
12. If needed, enter a **Termination date** in the format "DD-MON-YYYY" or use the calendar icon.  
*Note:* If you decide to enter a termination date, the user may not be able to print/copy on any uPrint device after that date.
13. If Activity and Location codes were entered, and you would like to see the descriptions associated to the codes before submitting the form, click the **Refresh** button. Clicking the **Cancel** button will bring you back to the main screen of this menu option and the FOAPAL will not be assigned to the user's profile.
14. Click the **Submit** button.
  - You will return to the main screen of this menu option and the following message will appear under the Fund Code field - "The FOAPAL record was successfully added".
  - A summary table of all assigned FOAPALs will be displayed.  
*Note:* Once a FOAPAL has been assigned to a user, the changes will only appear on the device's Account screen after the next data update period. These occur daily (Monday to Friday, excluding holidays) at 6am, 10am, 1pm and 4pm.

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### How to assign a uPrint Card Badge ID to users who do not have a McGill ID card

**Note:** A Badge ID is not required for regular academic staff and administrative and support staff. This applies only to **Active casual staff or externals (contract staff)** who have been assigned a McGill Username but do not have a McGill Staff ID card. They may be associated with a uPrint card for quick access to the uPrint devices.

Note: A FOAPAL must first be assigned to a person before a uPrint card Badge ID may be assigned. Follow the steps above. Once a FOAPAL is assigned, follow these steps:

1. Enter the 9 digit ID number in the **McGill ID** field. Click on the magnifying glass icon if the McGill ID is not known.

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2. Click the **List** button.

A summary table of all assigned FOAPALs will be displayed and further down a summary table of all assigned uPrint card Badge IDs will be displayed..

3. Enter the **uPrint card Badge ID** in the field.

*Note: The uPrint Badge ID corresponds to the first six digits of the numerical sequence that appears on the back of the card.*



### Assign a uPrint Badge ID to an individual

Active casual staff or externals (contract staff) who have been assigned a [McGill Username](#) but do not have a Badge ID can be assigned. Once a Badge ID has been associated with a person, it will only be usable for that person.

uPrint card Badge ID

Use to edit or to revoke.

| uPrint card Badge ID | Date Assigned | Password Waived | Last Updated by | Action |
|----------------------|---------------|-----------------|-----------------|--------|
|----------------------|---------------|-----------------|-----------------|--------|

4. Click the **Assign Badge ID** button.
5. On the next screen, choose whether or not to waive the password by selecting the radio button under the desired action. Selecting "PSWD Waived" means that there will be no prompt to enter a password when swiping the card at any uPrint device.

### Update the Badge ID information

You can choose whether or not the users of the uPrint card have their passwords **Waived**.

uPrint card Badge ID 256663  
Date Assigned 11-Sep-2013 14:28

PSWD Not Waived  PSWD Waived

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- Click the **Submit** button.

*Note: Once a Badge ID has been associated with a user, it will only be usable after the next data update period. These occur daily (Monday to Friday, excluding holidays) at 6am, 10am, 1pm and 4pm.*

### How to view/update/delete FOAPALs assigned to Users

- Enter the 9 digit ID number in the **McGill ID** field.
- Click the **LIST** button.  
A summary table of all assigned FOAPALs will be displayed.

McGill ID  Click the magnifier icon to search for a person. If nothing happens, you may already have an active Person Search window. Alt-tab to retrieve it.

Fund Code  Click the magnifier icon to search for a code. If nothing happens, you may already have an active Code Search window. Alt-tab to retrieve it.

Summary of FOAPAL Information for: 123456789 - Jane Doe  
Use the up/down arrows to re-order the display sequence. Use to edit or to delete.

| Tag | Default | Fund                         | Organization                | Account                                | Program                       | Activity            | Location                       | Term Date | Order | Action |
|-----|---------|------------------------------|-----------------------------|--|-------------------------------|---------------------|--------------------------------|-----------|-------|--------|
| FN1 | Y       | 123456<br>Financial Services | 00123<br>Financial Services | 700015<br>Photocopying (Cost Per Copy) | 4104<br>Support Serv. Finance | 000034<br>Help Desk | 118796<br>Rm 303 Durocher 3465 |           |       |        |

- Use the **icons** (under the **Order** and **Action** columns) to make changes. See the table below for further explanations:

| Field Name     | Explanation  |
|----------------|--|
| <b>Tag</b>     | Created when a FOAPAL is assigned to a user - used to help identify the FOAPAL to charge on the uPrint device Account screen.<br>If no "Tag" was entered when the record was created, the Fund-Activity-Location set of codes for the FOAPAL string will be displayed.<br><b>To make changes, use the edit icon.</b>                                   |
| <b>Default</b> | "Y" indicates that this is the default FOAPAL assigned to the user for uPrint charges.<br>There can only be one default FOAPAL.<br><b>To make changes, use the edit icon.</b><br>When multiple FOAPALs are assigned to a user, <b>the default FOAPAL will always be charged unless another FOAPAL is selected on the uPrint device Account screen.</b> |

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|                                    |  |
|------------------------------------|--|
| <b>Fund, Organization, Program</b> | <p>Organizaition and Program are default codes associated to each Fund. These codes cannot be changed.</p> <p><b>If the Fund should no longer be assigned to the user, use the delete icon</b> - keep in mind that a user that is not associated with any FOAPAL may not be able to print, copy, nor scan-to-email on any uPrint device.</p>   |
| <b>Account</b>                     | <p>Account code 700016 Photocopying (Cost Per Copy) will always be displayed - this code cannot be changed.</p>  |
| <b>Activity</b>                    | <p>Unless specified when the record was created, the default Activity code is 000000 Unassigned Activity.</p> <p><b>To make changes, use the edit icon.</b></p>  |
| <b>Location</b>                    | <p>Unless specified when the record was created, the default Location code is 000000 Unassigned Location.</p> <p><b>To make changes, use the edit icon.</b></p>  |
| <b>Term Date</b>                   | <p>If no termination date was selected when the record was created, this field remains blank.</p> <p>If a termination date was entered, it will be displayed - the user may not be able to print/copy on any uPrint device after that date.</p> <p><b>To make changes, use the edit icon.</b></p>  |
| <b>Order</b>                       | <p>Allows you to re-order the display sequence of the FOAPALs to appear on the uPrint device Account screen.</p> <p>Only four (4) FOAPALs appear on the uPrint device Account screen without the need to scroll.</p> <p>Click on the <b>up/down arrows next to the FOAPAL string to change the order</b> - FOAPALs will appear in the exact sequence you see in this list.</p>   |
| <b>Action</b>                      | <p><b>Edit icon:</b> Allows you to change Activity and Location codes, check/uncheck the flag for Default FOAPAL, change the assigned Tag, and change the Termination Date.</p> <ul style="list-style-type: none"> <li>○ Click on the <b>Edit</b> icon to make changes.</li> <li>○ If Activity and Location codes were changed, and you would like to see the descriptions associated to the codes before saving, click the <b>Refresh</b> button.</li> <li>○ Click on <b>Save</b> when all changes have been made. You will return to the main screen of this menu option and the following message will appear under the Fund Code field - "The FOAPAL record was successfully changed".</li> </ul> <p><i>Note: Once a FOAPAL has been updated, the change will only</i></p> |

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|  | <p><i>appear on the device's Account screen after the next data update period. These occur daily (Monday to Friday, excluding holidays) at 6am, 10am, 1pm and 4pm.</i></p> <ul style="list-style-type: none"><li>○ Clicking the <b>Cancel</b> button will bring you back to the main screen of this menu option and no changes will have been saved.</li></ul> <p><b>Delete icon:</b> Allows you to delete a FOAPAL assigned to an User. Keep in mind that a user that is not associated with any FOAPAL may not be able to print, copy, nor scan-to-email on any uPrint device.</p> <ul style="list-style-type: none"><li>○ Click on the <b>Delete</b> icon.</li><li>○ Click the <b>Delete FOAPAL</b> button to remove the record. You will return to the main screen of this menu option and the FOAPAL will no longer appear in the summary table of all assigned FOAPALs.</li></ul> <p><i>Note: Once a FOAPAL has been deleted, the change will only appear on the device's Account screen after the next data update period. These occur daily (Monday to Friday, excluding holidays) at 6am, 10am, 1pm and 4pm.</i></p> <ul style="list-style-type: none"><li>○ Clicking the <b>Cancel</b> button will bring you back to the main screen of this menu option and no changes will have been made.</li></ul> |
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## How to view/update/delete Badge IDs assigned to Users

1. Enter the 9 digit ID number in the **McGill ID** field.
2. Click the **LIST** button.

A summary table of all assigned FOAPALs will be displayed and further down a summary table of all assigned uPrint card Badge IDs will be displayed.

Assign a uPrint Badge ID to an individual

Active casual staff or externals (contract staff) who have been assigned a [McGill Username](#) but do not have a Badge ID can be assigned. Once a Badge ID has been associated with a person, it will only be usable by that person.

uPrint card Badge ID

uPrint card Badge ID Information for:

Use to edit or to revoke.

| uPrint card Badge ID | Date Assigned     | Password Waived | Last Updated by | Action |
|----------------------|-------------------|-----------------|-----------------|--------|
| 256663               | 11-Sep-2013 14:28 | Y               |                 |        |

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3. Use the **icons** (under the **Action** column) to make changes. See the table below for further explanations:

| <i>Field Name</i>      | <i>Explanation</i>  |
|------------------------|---|
| <b>Password Waived</b> | <p>"Y" indicates that that there will be <u>no prompt</u> to enter a password when swiping the card at any uPrint device.</p> <p>If the field is blank, it indicates that the option "PSWD Not Waived" was selected when assigning the uPrint card.</p> <p><b>To make changes, use the edit icon.</b></p>   |
| <b>Action</b>          | <p><b>Edit</b> icon: Allows you to choose whether or not to waive the password by selecting the radio button under the desired action.</p> <ul style="list-style-type: none"> <li>○ Click on the <b>Edit</b> icon to make changes.</li> <li>○ Click the <b>Submit</b> button when changes have been made. You will return to the main screen of this menu option.</li> </ul> <p><i>Note: Changes to uPrint card Badge IDs will only come into effect after the next data update period. These occur daily (Monday to Friday, excluding holidays) at 6am, 10am, 1pm and 4pm.</i></p> <ul style="list-style-type: none"> <li>○ Clicking the <b>Cancel</b> button will bring you back to the main screen of this menu option and no changes will have been saved.</li> </ul> <p><b>Revoke</b> icon: Allows you to remove the association of the uPrint card to the User. Keep in mind that a uPrint card that is not associated with any User may not be used to print, copy, nor scan-to-email on any uPrint device.</p> <ul style="list-style-type: none"> <li>○ Click on the <b>Revoke</b> icon.</li> <li>○ Click the <b>Submit</b> button when changes have been made. You will return to the main screen of this menu option.</li> </ul> <p><i>Note: Changes to uPrint card Badge IDs will only come into effect after the next data update period. These occur daily (Monday to Friday, excluding holidays) at 6am, 10am, 1pm and 4pm.</i></p> <ul style="list-style-type: none"> <li>○ Clicking the <b>Cancel</b> button will bring you back to the main screen of this menu option and no changes will have been saved.</li> </ul> |