

HOW TO Assign or Delete FOAPALs and uPrint card Badge IDs associated to Resource Accounts (uPrint)

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

1. **Assign FOAPALs**, that are within their Org jurisdiction, to Resource Accounts for uPrint charges.
2. **Assign uPrint cards (Badge ID)** to Resource Accounts 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 Resource Account, send your request to itsupport@mcgill.ca.*

How to assign a FOAPAL to a Resource Account AND how to assign a Resource Account to a uPrint Card Badge ID

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 and uPrint card Badge IDs associated to Resource Accounts**.

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McGill Username Click the magnifying glass icon 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.

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 Resource Account in the **McGill Username** field. Click on the magnifying glass icon if the Resource Account is not known.
6. If you have **already assigned a FOAPAL** to the Resource Account and **need to assign a uPrint card** to the entered Resource Account, click the **List** button and skip to [Step 16](#).
7. 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.
8. Click on the **Assign FOAPAL** button.
9. 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.

Fund	123456	Financial Services
Organization	00123	Financial Services
Account	700016	Photocopying (Cost Per Copy)
Program	1212	Support Serv. Finance
Activity	<input type="text" value="000000"/>	Unassigned Activity
Location	<input type="text" value="000000"/>	Unassigned Location

Default FOAPAL?

Tag

Termination Date



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10. 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'.
11. 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.
12. 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 resource account.
13. 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 resource account may not be used to print/copy on any uPrint device after that date.
14. 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 resource account.
15. 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 resource account, 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.
16. **Continue with the steps below to assign a uPrint card to a Resource Account.**
17. 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.



A FOAPAL must first be assigned to a Resource Account before a uPrint card Badge ID can be assigned. Once a Badge ID has been associated with a resource account, it will only be usable after the next data update period.

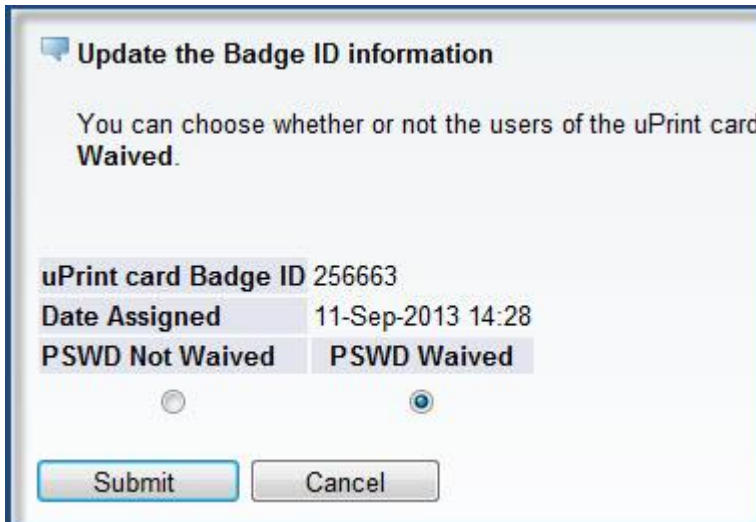
uPrint card Badge ID

Use  to edit or  to revoke.

uPrint card Badge ID	Date Assigned	Password Waived	Last Updated by	Action
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18. Click the **Assign Badge ID** button.
19. 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
Waived.

uPrint card Badge ID 256663
Date Assigned 11-Sep-2013 14:28
PSWD Not Waived PSWD Waived

Submit Cancel

20. Click the **Submit** button.
Note: Once a Badge ID has been associated with a Resource Account, 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.

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How to view/update/delete FOAPALs assigned to a Resource Account

1. Enter the Resource Account in the **McGill Username** field.
2. Click the **LIST** button.
A summary table of all assigned FOAPALs will be displayed.

McGill Username: casual.fs@mcgill.ca

Fund Code: [Search]

Assign FOAPAL

✓ The FOAPAL record was successfully added.

Summary of FOAPAL Information for: casual.fs@mcgill.ca
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
TEST	Y	123456	00123	700016	4104	000000	000000			
		Financial Services Financial Services		Photocopying (Cost Per Copy)	Support. Serv. Finance	Unassigned Activity	Unassigned Location			
TEST2		123456	00123	700016	4104	000574	000000			
		Financial Services Financial Services		Photocopying (Cost Per Copy)	Support. Serv. Finance	Casuals (Aht)	Unassigned Location			

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

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

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Fund, Organization, Program	<p>Organizaition and Program are default codes associated to each Fund. These codes cannot be changed.</p> <p>If the Fund should no longer be assigned to the resource account, use the delete icon - keep in mind that a resource account that is not associated with any FOAPAL may not be used to print, copy, nor scan-to-email on any uPrint device.</p>
Account	<p>Account code 700016 Photocopying (Cost Per Copy) will always be displayed - this code cannot be changed.</p>
Activity	<p>Unless specified when the record was created, the default Activity code is 000000 Unassigned Activity.</p> <p>To make changes, use the edit icon.</p>
Location	<p>Unless specified when the record was created, the default Location code is 000000 Unassigned Location.</p> <p>To make changes, use the edit icon.</p>
Term Date	<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 resource account may not be used to print/copy on any uPrint device after that date.</p> <p>To make changes, use the edit icon.</p>
Order	<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 up/down arrows next to the FOAPAL string to change the order - FOAPALs will appear in the exact sequence you see in this list.</p>
Action	<p>Edit icon: 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"> ○ Click on the Edit icon to make changes. ○ If Activity and Location codes were changed, and you would like to see the descriptions associated to the codes before saving, click the Refresh button. ○ Click on Save when all changes have been made. You will return to the main screen of this menu option and the following

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	<p>message will appear under the Fund Code field - "The FOAPAL record was successfully changed".</p> <p><i>Note: Once a FOAPAL has been updated, 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">○ Clicking the Cancel button will bring you back to the main screen of this menu option and no changes will have been saved. <p>Delete icon: Allows you to delete a FOAPAL assigned to the Resource Account. Keep in mind that a resource account that is not associated with any FOAPAL may not be used to print, copy, nor scan-to-email on any uPrint device.</p> <ul style="list-style-type: none">○ Click on the Delete icon.○ Click the Delete FOAPAL 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. <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">○ Clicking the Cancel button will bring you back to the main screen of this menu option and no changes will have been made.
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How to view/update/delete Badge IDs assigned to a Resource Account

1. Enter the Resource Account in the **McGill Username** 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.

A FOAPAL must first be assigned to a Resource Account before a uPrint card Badge ID can be assigned. Once a Badge ID has been associated with a resource account, it will only be usable after the next data update period.

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
256660	27-Jan-2012 14:03	Y	<input type="text"/>	

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

Field Name	Explanation
Password Waived	"Y" indicates that there will be <u>no prompt</u> to enter a password when swiping the card at any uPrint device. If the field is blank, it indicates that the option "PSWD Not Waived" was selected when assigning the uPrint card to the Resource Account. To make changes, use the edit icon.
Action	Edit icon: Allows you to choose whether or not to waive the password by selecting the radio button under the desired action. <ul style="list-style-type: none"> o Click on the Edit icon to make changes. o Click the Submit button when changes have been made. You will return to the main screen of this menu option. <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>

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- Clicking the **Cancel** button will bring you back to the main screen of this menu option and no changes will have been saved.

Revoke icon: Allows you to remove the association of the uPrint card to the Resource Account. Keep in mind that a uPrint card that is not associated with any Resource Account/User may not be used to print, copy, nor scan-to-email on any uPrint device.

- Click on the **Revoke** icon.
- Click the **Submit** button when changes have been made. You will return to the main screen of this menu option.

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.

- Clicking the **Cancel** button will bring you back to the main screen of this menu option and no changes will have been saved.