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### UC Flex System Access Policy

Prior to the start of financials training, the UC Flex project team determined that proper training was essential for end users to be able to use the system efficiently and effectively, without compromising the integrity of the system and the data it contains. As such, individual course plans were carefully developed for each end user under the guidance of Supervisors and Business Administrators, and numerous training opportunities were offered for all end users, especially primary users, during the months of May and June. Frequent communications reminding end users of the need to attend training in order to gain access to the system and announcing open spaces and new offerings, have also been provided since the beginning of May.

On July 5, 2005, access to the new UC Flex system will **only** be granted to all end users who satisfy **both** of the following criteria:

1. You must have completed the **majority** of your primary courses listed on your individual course plan
2. You must have a current CUFS account OR have responded affirmatively to an e-mail requesting your acceptance of University Rule 3361:10-17-04: Conduct and Ethics: Use of University Resources, particularly the responsible use of information policy.

Before July 5th, all end users that have met these criteria will receive a confirmation that access has been granted, along with instructions on how to access UC Flex Financials. Likewise, all those that have not met these criteria will receive a notification that access has been denied.

End users that have been denied access and need to use the system must contact the person who approves access for your area (i.e. Supervisor, Business Administrator, etc.) That person must send an e-mail request to UC Flex Security ([ucflexsecure@ucmail.uc.edu](mailto:ucflexsecure@ucmail.uc.edu)) to initiate the process of establishing your role in the UC Flex system and scheduling any necessary system training.

In order to avoid any disruption to your work resulting from being unable to access the UC Flex system, you are urged to register for and attend the training courses identified on your individual course plan prior to July 5, 2005.

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### User Responsibility

As with all University business systems, responsibility for appropriate use is a condition for accessing and using the UC Flex Financials system. Auditor requirements and the adoption of best practices are designed to ensure the protection of individual rights and the interests of the institution. As such, each individual user is required to explicitly agree to University Rule 3361: 10-17-04: Conduct and Ethics: Use of University Resources (<http://www.uc.edu/ucit/itgenpolicy.html>). An excerpt of this is included below:

In accordance with University Rule 3361:10-17-04: Conduct and Ethics: Use of University Resources ( <http://www.uc.edu/ucit/itgenpolicy.html> ):

Members of the Faculty, Administration, Student Body, Volunteer Workers, and Staff are responsible for the appropriate use of University resources. Use of University resources in a manner inconsistent with this rule is a violation subject to disciplinary action.

(B) University Property, Facilities, and Services:

(3) All University computers shall be used solely for authorized academic, instructional, research, administrative or contract purposes. Any unauthorized use of computer resources and/or facilities shall constitute a violation of University policy and will subject the violator to University disciplinary action.

Further, all users of the University's information-technological resources must adhere to the Policy for Responsible Use of Information Technology at the University of Cincinnati (<http://www.uc.edu/ucit/itgenpolicy.html> ).

The user of this account shall be responsible for all activities of the account. This account is not transferable to any other individual, nor should the password be given to anyone else.

Those who do not have a current CUFS account were sent an e-mail asking them to indicate their acceptance of the above University rule by June 23, 2005. Your acceptance is required before being granted access to the UC Flex Financials system. If you do not have a current CUFS account and are an identified end user of the UC Flex Financials system, and you did not receive an e-mail, please send an e-mail to UC Flex Security (ucflexsecure@ucmail.uc.edu) immediately. Those who have a current CUFS account should review the above rule however, no further action is required.

## Printing in UC Flex

The following information is for printing from personal computers only. Although printing from Apple Macintosh computers is not supported by the vendor (SAP), those who are accessing UC Flex using the PC Simulator may be able to print using these processes.

If you are printing forms or reports using your default local or network Windows printer (with the printer appearing in UC Flex as "locl") and the form or report does not print correctly, it is recommended that you either gain access to a UC Flex **defined** printer, or try to print to a HP PCL5 or above compatible printer. If you continue to experience problems printing, please contact the UCit Help Desk on **556-HELP** (4357).

### Printing a Financials Report

1. Retrieve the report that you want to print from UC Flex.
2. Select your Windows default printer (appearing as "locl" in UC Flex) from the list of available printers.

**Note:** If a UC Flex **defined** printer is available to you, you may also print Financials Reports to that printer by selecting it from the list of available printers.

### Printing a Customized Form

The following is a list of customized forms:

- Sundry Gift/Non Gift Deposit
- Customer Invoice
- Customer Credit
- Internal Billings
- Goods Receipts (Receiver)
- Funds Reservations (Travel)

1. Select your department's UC Flex **defined** printer and print.

**Note 1:** To request access to a UC Flex defined printer, contact your IT Unit Coordinator or Business Administrator.


**Note 2:** Some customized forms can be printed using your Windows default printer (appearing as "locl" in UC Flex) however, the correct output can only be guaranteed on UC Flex **defined** printers.

## Printing All Other Forms

1. Select your Windows default printer (appearing as "locl" in UC Flex) and print.

**Note:** If the form does not print correctly, it is recommended that you either gain access to a UC Flex **defined** printer, or try to print to a HP PCL5 or above compatible printer. The correct output can only be guaranteed on UC Flex **defined** printers. If you continue to experience problems printing, please contact the UCit Help Desk on **556-HELP** (4357).

## Printing a UC Flex Application Screen

1. Click on the "Customizing of local layout" icon on the SAP menu bar. 
2. Select "Hardcopy" from the dropdown list.
3. The view on your screen will print to your Windows default printer (appearing as "locl" in UC Flex).

## Printing an SAP Help Screen

1. Click on Help on the SAP menu bar.
2. Select either "Application Help", "SAP Library" or "Glossary" or "UC Flex Help" from the dropdown list.
3. When you locate the information that you want to print, right-click on the page and select "Print" from the dropdown list.
4. Select your Windows default printer (appearing as "locl" in UC Flex) and print.

**Note:** Details for printing Business Warehouse (BW) Reports will be available in the coming weeks.

## Printing from home or while traveling

If you are working from home or are traveling and are connected to the UC network via VPN or UC Dial-up Access, you will be able to print to your UC Flex defined network printer. As a rule of thumb: if you can get into the network to use UC Flex, you will be able to print to a **defined network printer**.

If you experience any problems printing, please contact the UCit Help Desk on **556-HELP** (4357).

## Getting Started in UC Flex on July 5th

### How to Logon to UC Flex (beginning July 5th only)

All users will logon to the UC Flex system via the UC Flex Portal which is accessed by clicking on the following link: [www.ucflex.uc.edu](http://www.ucflex.uc.edu) or by typing it into your web browser (we suggest that you bookmark this site to save having to type in the URL each time you need to access the system). You will need the User ID and Password that you were given when you first attended UC Flex training. **Note that you will not be able to access the system until July 5.**

User ID: This is your University unique (6+2) address.

Password: The 8-digit password is the first 4 digits of your birthday (MMDD – insert a 0 to make four digits where applicable) + last 4 digits of SSN.

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### Changing Your UC Flex Password

You should change your UC Flex Password the **first time** that you logon to the UC Flex system (if you changed your password in the training sandbox, you will not need to change it again for 90 days). To change your password, logon to the system as above. Next, click on “**Personalize**” in the upper right-hand corner. You will be asked to enter your old password (the initial password that you used to logon to the system), followed by your new password, which must be a minimum of **5** characters. You will then need to confirm your new password by entering it again. When you have done this, press **Enter** on your keyboard. The message “Password was changed” should be displayed on the screen. Then click on **Close** and you will be returned to the portal home page.

More detailed information on how to logon to UC Flex and how to change your password can be found on the UC Flex Help web site at [www.ucflex.uc.edu/help](http://www.ucflex.uc.edu/help). On the left hand side of the help page, click on **Quick Reference Guides** then select **Using the UC Flex Production Portal**.

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### **Setting User Preferences**

On the first day that you use the UC Flex system, you need to set your user preferences. For instructions on how to set your user preferences, go to the UC Flex Help web site at [www.ucflex.uc.edu/help](http://www.ucflex.uc.edu/help). On the left hand side of the help page, click on **Quick Reference Guides** then select **Set User Preferences**.

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### **Need Help?**

While the UC Flex system contains an extensive online Help feature, from July 5, 2005, users will also be able to get help with questions or problems relating to the UC Flex Financials system from your IT Unit Coordinator or the UCit Help Desk, depending on the nature of the problem you are experiencing.

As is currently the case, your IT Unit Coordinator will be able to help you with basic level technical support including:

- assistance with SAP GUI installation
- basic support for the SAP GUI and Browser navigation
- printer installation
- UC Flex portal log on
- assistance with communicating technical and business problems to the UCit Help Desk
- password and login management.

If you do not have an IT Unit Coordinator, or your IT Unit Coordinator is unable to help you, or your problem is **business process** (i.e. transaction) related, you should call the UCit Help Desk on **556-HELP** (4357). The UCit Help Desk will try to resolve all UC Flex problems immediately. If they are unable to do so, a Trouble Ticket will be opened and the issue routed to the UC Flex Competency Center for prompt resolution.

**Note:** Please do not call the CUFS Hotline with UC Flex questions. These calls will be routed to the UCit Help Desk and thus delay your response.

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### Last Chance for Training Before Go-Live

Next week is the last week of UC Flex training before the July 5<sup>th</sup> Go-Live. There are many classes still open including P-Card Invoice Processing, Funds Reservation and Term Contract Release Order Processing. If you are designated a primary user in your office area and have not attended the training classes prescribed for you on your individual course plan, this is your last opportunity to attend training before the UC Flex go-live date. Please note that primary users who fail to attend a majority of the courses identified on their individual course plan will be denied access to the UC Flex system in accordance with the System Access Policy described earlier in this bulletin.

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### Training Scheduled at Clermont and RWC

The following courses are scheduled for campus staff at Clermont College and Raymond Walters College:

#### Clermont College:

Class:	Date:	Time:	Room:
P-Card Processing	June 22	9.30 – 11.30am	Educational Services Building, Room 210
P-Card Processing	June 22	1.00 – 3.00pm	
Funds Reservation	June 27	1.00 – 5.00pm	
UC Flex Display & Reporting	June 29	9.00 – 4.00pm	

#### RWC:

Class:	Date:	Time:	Room:
UC Flex Display & Reporting	June 28	9.00 – 4.00pm	112A Muntz

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### Last Chance to Practice Your UC Flex Skills Before Go-Live!

All UC Flex users who have attended at least one training course (other than the SAP Overview and Online Navigation courses) and have the SAP GUI installed on their computer are able to access the UC Flex Training sandbox at [www.ucflex.uc.edu/training](http://www.ucflex.uc.edu/training), to practice what they have learned. You will need the User ID and Password that you were given when you first attended training.

Please note that the training sandbox will be decommissioned at go-live in order to avoid any confusion as to what system a user is logged into. You are encouraged to explore the capabilities of the new UC Flex system in the training sandbox where there is no need to worry about making mistakes or changing data.

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### Q&A

Q: Do I need a UC Flex defined printer to print UC Flex reports?

A: No. UC Flex reports can be printed using your default Windows printer (which appears as “locl” in UC Flex).

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### Project Contact Information

We welcome your feedback! Questions, concerns and suggestions can be submitted via:

Dennis Yockey, UC Flex Functional Program Manager

E-mail: [dennis.yockey@uc.edu](mailto:dennis.yockey@uc.edu)

Telephone #: x65003

Jim Lewis, UC Flex Technical Program Manager

E-mail: [james.lewis@uc.edu](mailto:james.lewis@uc.edu)

Telephone #: x69035

UC Flex e-mail account: [ucflex@ucmail.uc.edu](mailto:ucflex@ucmail.uc.edu)

[We review this e-mail account regularly]

We urge you to stay informed!