

Tricks and Tips - Tech

Dell Hardware Service Call – Available 24/7:

1. Before you contact Dell or UAN please check the following:
 - Confirm electrical outlets, circuit breakers, battery backup are working.
 - Check for loose or disconnected cables.
2. Contact Dell Technical Support when there is hardware failure. Examples:
 - Computer does not startup properly.
 - Monitor does not function properly.
 - Printer is not recognized by computer, failure to display ready state, or frequent paper jams.
 - CD/DVD drive does not function properly – read and/or write errors.

Please Note: Dell 2350dn printer might be replaced with 2360dn newer model.

3. Locate your hardware service tag number. Comprised of numbers and letters, example GC12Y3. *In some cases Dell might ask for Express Service Code – comprised of numbers only.*
 - a. Desktop the service tag number is located on the top front panel.
 - b. Laptop the service tag number is located on the cover.
 - c. Printer the service tag number is located on the rear panel.

Reminder: An upgraded warranty was purchased for the hardware. The upgrade warranty is for next day service. The warranty also allows for an onsite technician for any repairs which you do not feel comfortable in performing.

4. Two options to contacting Dell Hardware Support

Reminder: Before contacting Dell you should be near your computer or printer to perform diagnostics.

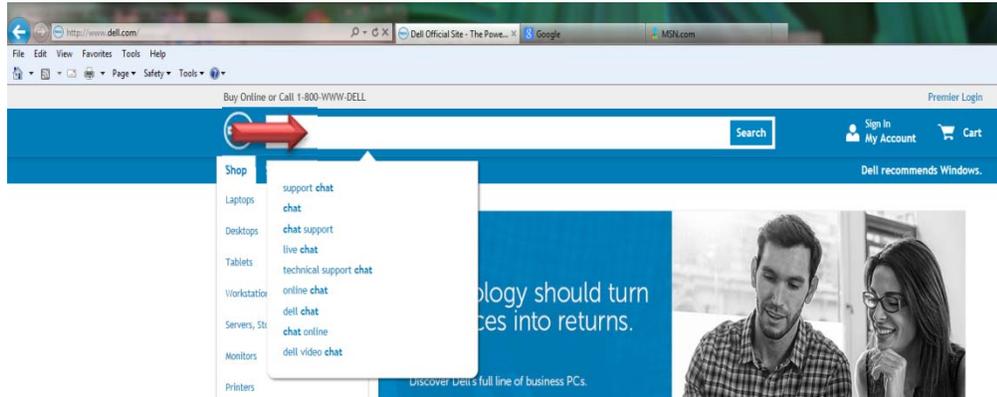
Option 1: Phone

- a. Call 1-866-516-3115
- b. Press or say 2 to start process.
- c. Follow easy prompts using phone pad and/or voice.
- d. When communicating with the Dell representative, when asked “*Who is the owner of the hardware?*” you will say, “**Ohio Auditor of State, Uniform Accounting Network**”
Please Note: *Important to properly identify yourself or service could be denied.*
- e. They may want to confirm your personal info.
- f. Ask for the Dell Service Request Number (your case number) assigned to this incident for future reference.

Option 2: Chat – must have internet access.

- a. You can use a mobile device like tablet or smartphone, and/or available computer.
NOTE: Dell might run diagnostics on UAN computer if it's operational.
- b. <http://www.dell.com/>

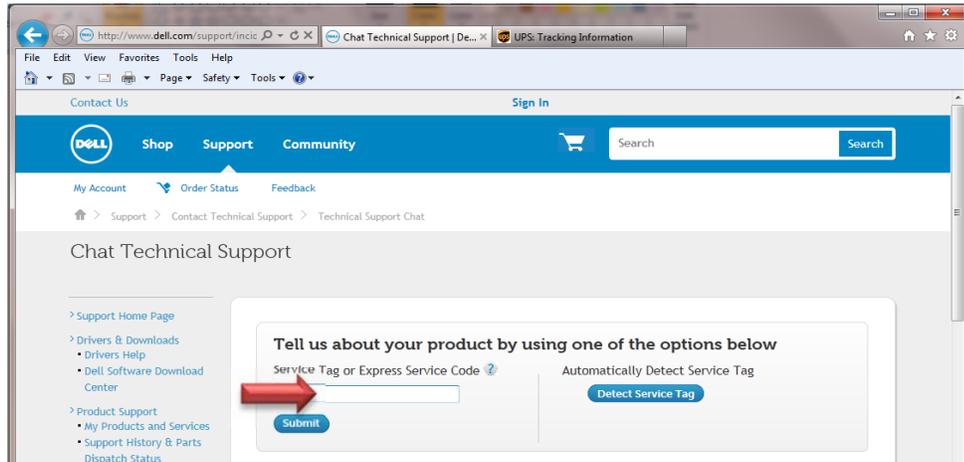
c. Type: chat in search window.



d. Click Search.

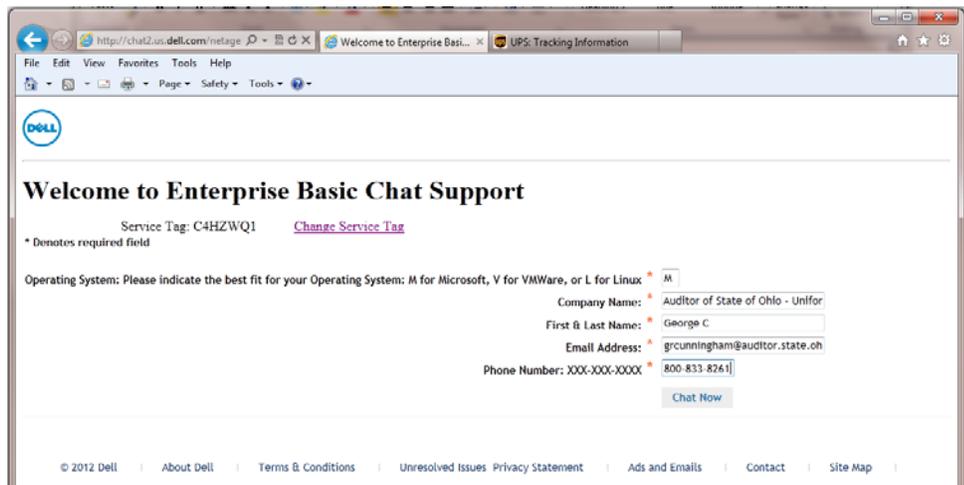
e. Click Technical Support Chat.

f. You will see screen to enter Service Tag and/or Express Service Code.



g. Click Submit.

h. Wait for Welcome screen.



i. Enter Company Name: **Ohio Auditor of State, Uniform Accounting Network**

Please Note: Important to properly identify yourself or service could be denied.

j. Enter required information and describe hardware problems.

k. Click Chat Now.

l. Wait for Dell representative greeting.

m. Type your responses to their questions, hit Enter to send.

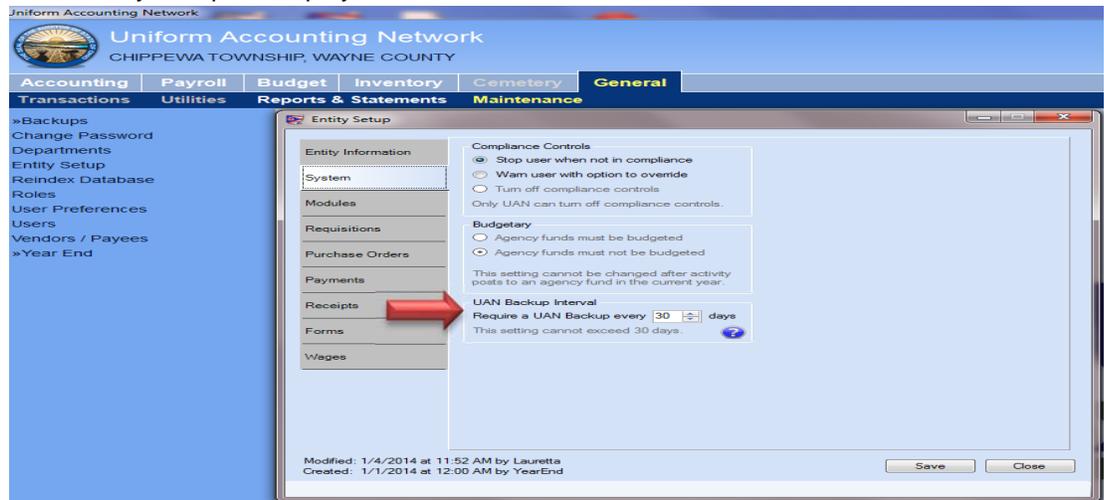
- n. When parts and/or repair person is dispatched, please give your street address and phone numbers.
- o. When session is finished, Dell will send copy to your email address for your records.

UAN Backups:

1. Perform UAN Application and My Documents backups frequently.
 - a. Whenever changes occur in these areas.
 - b. Prior Software backup captures Prior Years, Cemetery, and Minutes activity. You should perform this backup at least once using large capacity media.
2. Backups can be performed on several media types:
 - a. Recommended: CD-R, DVD-R, USB flash and/or external drives.
 - b. Avoid CD-RW and DVD-RW. You could overwrite and lose previous data.
 - c. When using disc media, designate new backup for that month and label accordingly. Example: UAN Backup for August 2014. Repeat for each month of the year, etc.
 - d. You don't want all your eggs in one basket!
 - e. Retain weekly backup copies offsite in safe place for emergency purposes.
3. Perform backups often and keep a second backup off site in a secure location.

Reminder: You can never backup too much! Better often than less to avoid potential data loss due to hardware failure or circumstances beyond your control! The UAN application requirement of once a month/every 30 days is a minimum, but you can backup anytime and as many times as you want.

4. How to set backup notification – default is 30 days
 - a. Sign into UAN
 - b. Click “General” tab.
 - c. Click “Maintenance” tab.
 - d. Click “Entity Setup” to display screen.



- e. Click “System”
- f. Go to UAN Backup Interval.
- g. Select number of days.

Frequently Asked Questions:

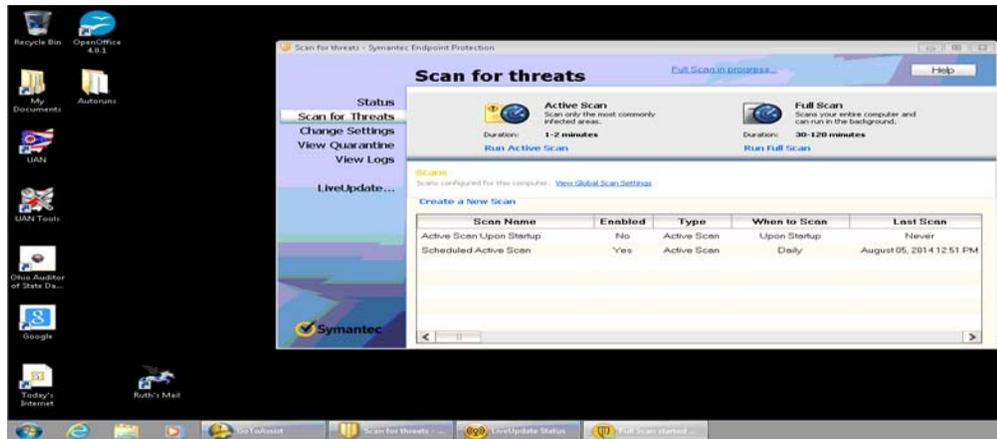
1. Unable to UAN backup? Who should I contact for help?
 - a. When blank CD and/or DVD fails, then use USB flash or external drive. Select appropriate media device option.

- b. Contact UAN Technical Support when these fail to allow backup completion.
2. Paper is pulling from the wrong tray? Who should I contact for help?
 - a. Please contact the Uniform Accounting Network. UAN has detail instructions posted on our website (UANLink) at: https://uanlink.ohioauditor.gov/pdf/hardware-software_resources/Reset_Printer_Tray_instructions.pdf
 - b. Or, UAN can also assist you over the phone.
3. I found some entertaining 'free' software e.g. PC Cleaner, games...etc. Can I install it?
 - a. Some software comes with strings attached e.g. virus, malware, spyware, Trojans, worms, and annoying popups
 - b. In extreme cases, the client's computer must be reimaged (erased) and data reloaded from last backup performed.
 - c. Do not install free or purchased software unless you consult with UAN and submit letter requesting approval letter
4. Can I install aftermarket software and/or hardware?
 - a. Do not install free or purchased software and/or hardware unless you consult with UAN and submit letter requesting approval letter.
5. Can I install Google Chrome, and/or Mozilla Firefox?
 - a. Yes, and you do not need UAN's approval to install it.
6. I'm receiving a message asking me to update my Adobe application. Should I allow the update? Which updates should I allow?
 - a. Microsoft Office and Windows
 - b. Adobe
 - c. Symantec or your brand of choice (Antivirus)
 - d. Java
 - e. When in doubt, contact UAN.
7. How do I know if my system has a virus?
 - a. Run an antivirus scan (full scan).
 - b. UAN has detail instructions posted on our website (UANLink) at: https://uanlink.ohioauditor.gov/pdf/hardware-software_resources/Symantec_Install_and_Live_Update_Instructions.pdf
 - c. You will see the following screens:





d.



e.

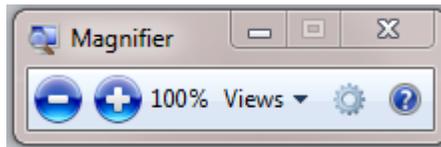
8. What should I do if my system has a virus?
 - a. Contact UAN Technical Support immediately!

9. I would like to network my printer. Do I need a wireless card? Can I connect it to a router?
 - a. You can connect printer to router when slots are available using an Ethernet cable.
 - b. Contact UAN Technical Support for assistance when needed.

10. How do I network the UAN application for multi-users?
 - a. UAN application can be networked and allows for multi users. We commend if your interest in implementing a network and would like some guidance to please call us. There are many types of networks and cost can vary, so we can point you a direction that meets your needs and help prevent you from buying more than what you need.

11. If I move my desktop to a new location, what do I need to do?
 - a. Perform a UAN, My Documents, and Prior Software backups.
 - b. Turn off and unplug computer, monitor, and attached printer.
 - c. Mark (label or photograph) and/or disconnect cables when necessary.
 - d. Notify your insurance company, if the hardware is a change of address.

12. Can I change my screen resolutions?
 - a. It's recommended you **do not** change default screen resolution settings from 1920 x 1080, as these might adversely UAN application not displaying screens correctly, example, missing fields, etc.
 - b. You can use "Magnifier Glass".
 - c. Start Button > All Programs > Accessories > Ease of Access > Magnifier

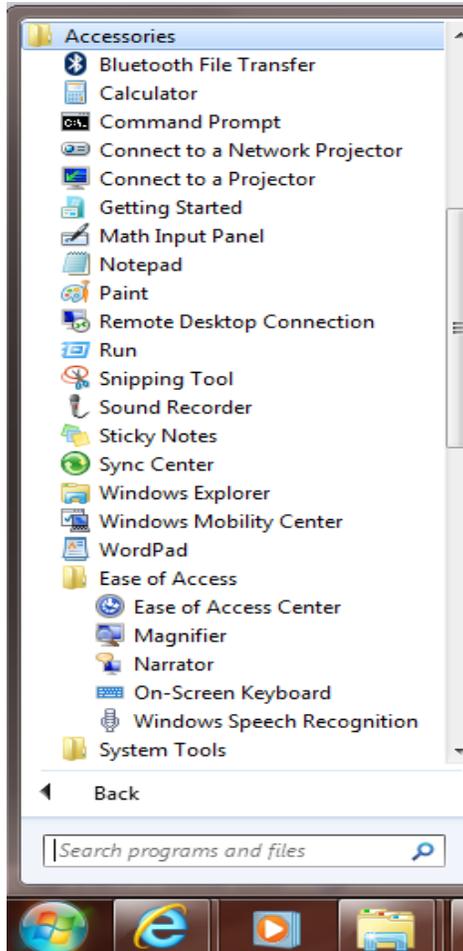


- d. You will see:
- e. Select magnification level using negative and plus buttons.
- f. Move cursor to area to improve readability.

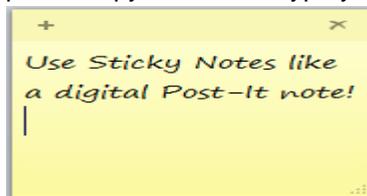


- g. You can toggle Magnifier from taskbar with this icon:
- h. You can Right click or use "X" to close.

13. Additional features located under Start -> All Programs -> Accessories:



- a. **Sticky Notes** - allows you to post notes on desktop. Right-click to change color, cut, paste, copy, or delete. Type your message.



- b. **Snipping Tool** - is a screen shooting utility. It can take screenshots of an open window, rectangular areas, a free-form area, or the entire screen. Snips can then be annotated using a mouse or a tablet, stored as an image file (PNG, GIF, or JPEG file) or e-mailed.

Tricks and Tips - Application

Screen Navigation

1. Visual Glossary
 - a. Use the Visual Glossary to get to know the layout and terminology of the UAN Accounting Software Program.
2. Sorting by Heading
 - a. Clicking on a Heading sorts the list view by that Heading field.
3. Changing the Year
 - a. Prior Years 2012 and before exist outside of UAN. Prior Years 2013 and onward exist within UAN through a dropdown selection.
 - b. However, previous Year End reports can be found in General → Reports & Statements → Year End.
4. Using the Filters, Sorting and Options Tab in Reporting
 - a. The Filters and Sorting Tab are a great way to bring more contexts to report by limiting report data. E.G. only showing one account type instead of all account types.
 - b. Options change the look and the feel of a report.
5. Data Selection Shortcuts
 - a. Ctrl-U Selects data from that point upward.
 - b. Ctrl-D Selects data from that point downward
 - c. Using Select All can also Clear All.
6. Using Hot Keys
 - a. The Alt key in combination with the underlined letter in an Action Button can take the place of using the mouse to click.
7. Using the Keyboard to Navigate UAN
 - a. Tab and the arrow keys are still available to navigate through UAN without a mouse.
8. Arrow over Blue Question Marks, Yellow Caution Signs and Red Exclamation Points
 - a. Moving the Arrow mouse cursor over Blue Question Mark items, Yellow Caution Signs and Red Exclamation Points can provide answers

Reports

1. Advanced Screen Navigation – Using the screen to help with reporting
 - a. Use UAN Screens instead of Reporting for quick answers. e.g. showing just advertising for all funds.
2. Using Search
 - a. Use the Search Icon at the top right of the screen area to find specific items or narrow data down.
 - b. Process – using the utility screen search to narrow down for reporting. Demo.
3. Using FAQ'S, Help, the UANLink and AOS Internet Shortcuts
 - a. FAQ's (bottom left of the UAN screen) and "Need Help?" (top right of the UAN screen) are great places to start with to find answers when UAN Support is not available.
 - b. There are shortcuts to the UANLink and AOS websites
4. Using System Utilities and UAN Tools

- a. System Utilities and UAN Tools provide access to great tools to add to the fiscal officer toolbox.
5. Using Training
- a. The Training environment lets you use your own data to practice and become comfortable with actions in UAN.
 - b. Found in UAN Tools

GENERAL

1. Users and Roles in UAN
 - a. Users is anyone with separate access to enter UAN. Roles put limits on the UAN access of a User.
 - b. General --> Maintenance --> Users and General --> Maintenance --> Roles.
2. Reset Users Default Password
 - a. A User with Administrative rights can reset the Default Password for any other User.
 - b. General --> Maintenance --> Users
3. Using User Preferences
 - a. User Preferences changes the everyday look and feel of UAN.
 - b. General --> Maintenance --> User Preferences.
4. Compliance Report & Compliance Controls
 - a. The Compliance Report will show if there were any Compliance Overrides. This is typically highly scrutinized during an Audit. You can fix it now but you won't be able to fix it in the next year.
 - b. Proper settings can help eliminate/limit Compliance Violations.
 - c. General → Maintenance → Entity Setup, System Tab.
5. Options for Printing a Financial Worksheet
 - a. There are many ways to change the way a Budget Financial Worksheet when you select the Print action button.
 - b. Budget --> Transactions --> Financial Worksheets

PAYROLL

1. Options for Printing Wages
 - a. Some Warrant and Voucher printing options are only available when Printing Wages.
2. Using the Withholding Editor for a quick "snapshot"
 - a. The Withholding Editor can provide "At a Glance" information about your entity's Withholding setup.
 - b. Payroll → Maintenance → Withholdings Editor
3. Using Additional Information
 - a. Additional Information can be used to supplement or replace going into physical files.
 - b. Payroll → Maintenance → Additional Information
4. Using the Payroll Utilities
 - a. Try using the utilities to see how they work before you need them.
 - b. Payroll → Utilities
5. Recording Adjustments versus Data Entry Line
 - a. Use the adjustments area and not the new entry area.