

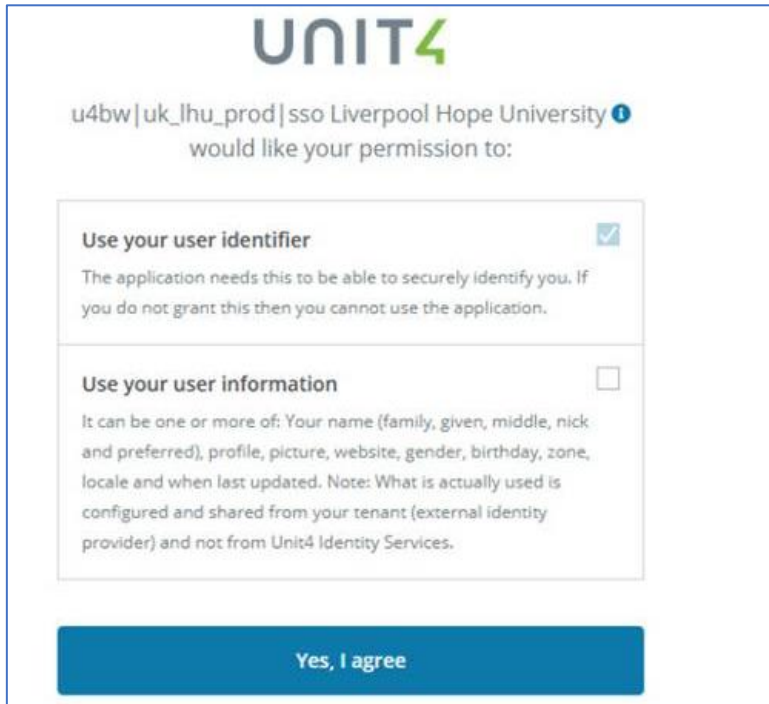
Accessing U4ERP

First Login

- Click the link below or copy and paste into your browser.

[Homescreen menu - Unit4 ERP](#)

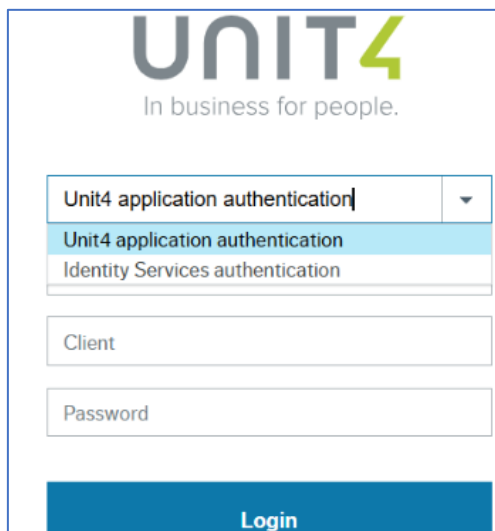
- Please be aware that when signing in for the first time, you will be greeted with the message below.
- This is required to allow the system to establish your account in the new cloud environment. Please select **both checkboxes** and click "**Yes, I agree**" to complete the sign-in process.



The image shows a permission screen from Unit4. At the top is the Unit4 logo. Below it, the text reads "u4bw|uk_lhu_prod|sso Liverpool Hope University" followed by an information icon. Below this, it says "would like your permission to:". There are two permission boxes. The first is "Use your user identifier" with a checked checkbox and a description: "The application needs this to be able to securely identify you. If you do not grant this then you cannot use the application." The second is "Use your user information" with an unchecked checkbox and a description: "It can be one or more of: Your name (family, given, middle, nick and preferred), profile, picture, website, gender, birthday, zone, locale and when last updated. Note: What is actually used is configured and shared from your tenant (external identity provider) and not from Unit4 Identity Services." At the bottom is a large blue button that says "Yes, I agree".

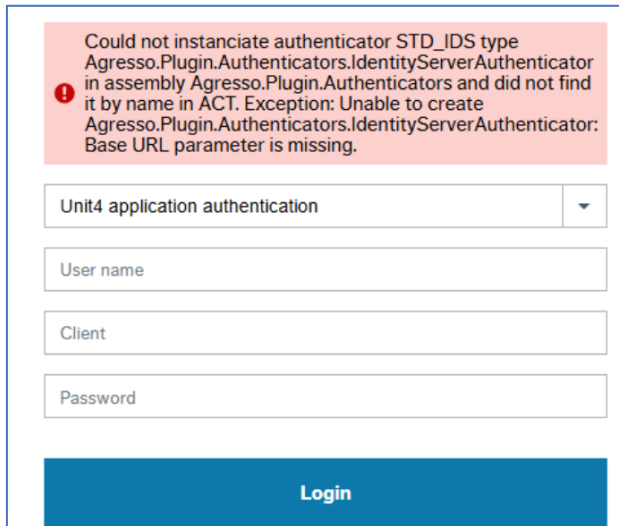
Problem Solving

- If the following screen appears select 'Identity Services Authentication' from the drop down.

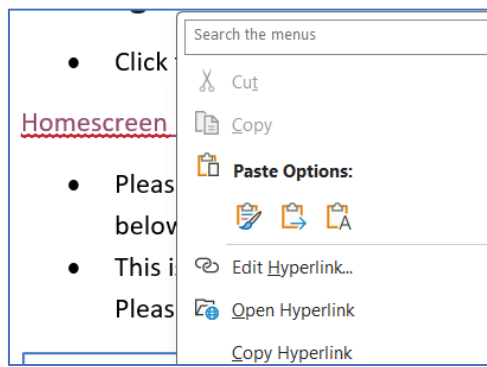


The image shows a login screen from Unit4. At the top is the Unit4 logo with the tagline "In business for people." Below this is a dropdown menu currently showing "Unit4 application authentication". The dropdown list is open, showing "Unit4 application authentication" and "Identity Services authentication". Below the dropdown are two input fields labeled "Client" and "Password". At the bottom is a large blue button that says "Login".

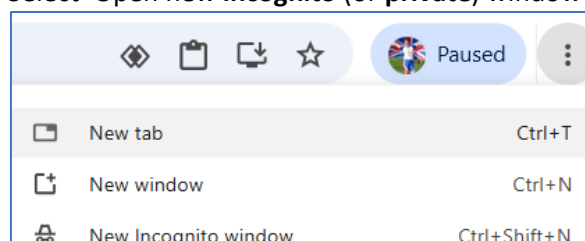
- If the following error appears, try opening the link in an incognito window.



- To open the link in an incognito window.
 - Right click on the link and select Open Hyperlink



- In the browser select the 3 dots (or three lines) in the top right corner
 - Select 'Open new **incognito** (or **private**) window'



- Paste the link into the browser and enter

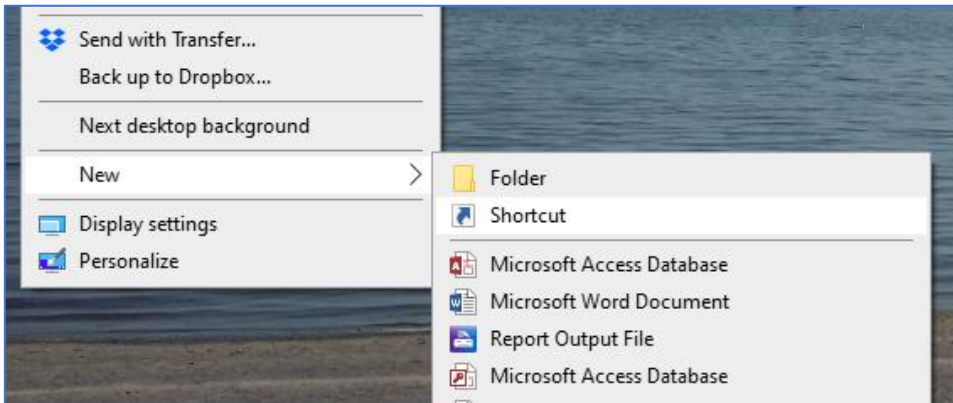
If you have issues logging in or have to use an incognito window please contact the Finance System Team financesystem@hope.ac.uk

Further guidance and support

- Further guidance and support can be found at
 - <https://www.hope.ac.uk/gateway/staff/stafffinance/financesystem-u4erpagresso/>

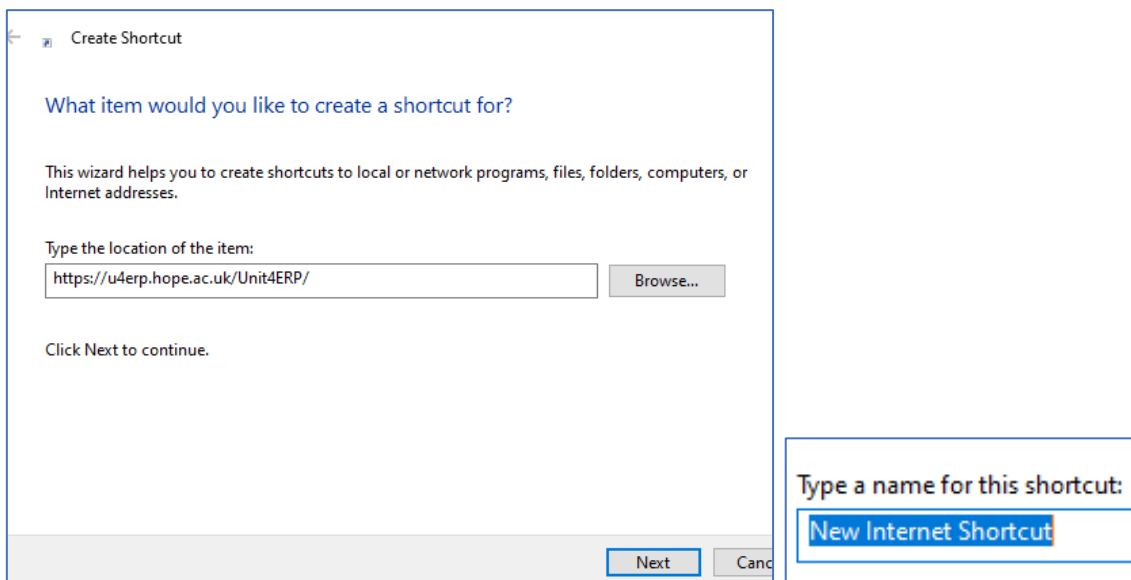
Creating a Desktop Shortcut to U4ERP Web.

- Right click over the desktop screen
- Select **New** and **Shortcut**

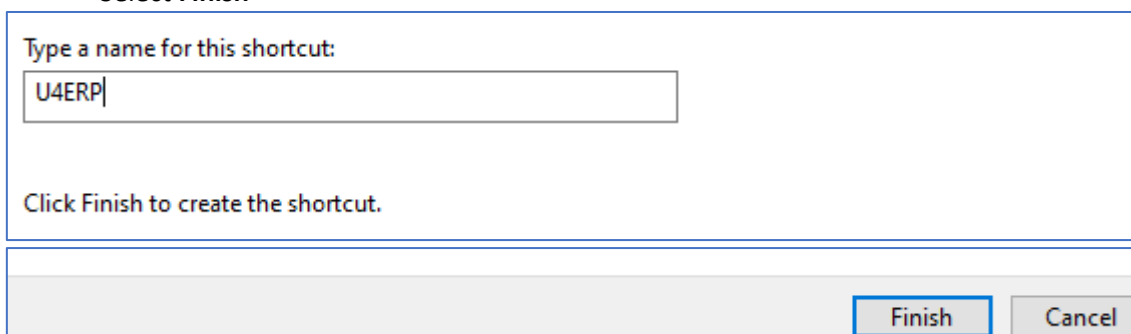


- Enter or paste the link into '**Type the location of the item:**'
- Select **Next**

Homescreen menu - Unit4 ERP



- Enter a name for the Icon into '**Type a name for this shortcut:**'
- Select **Finish**

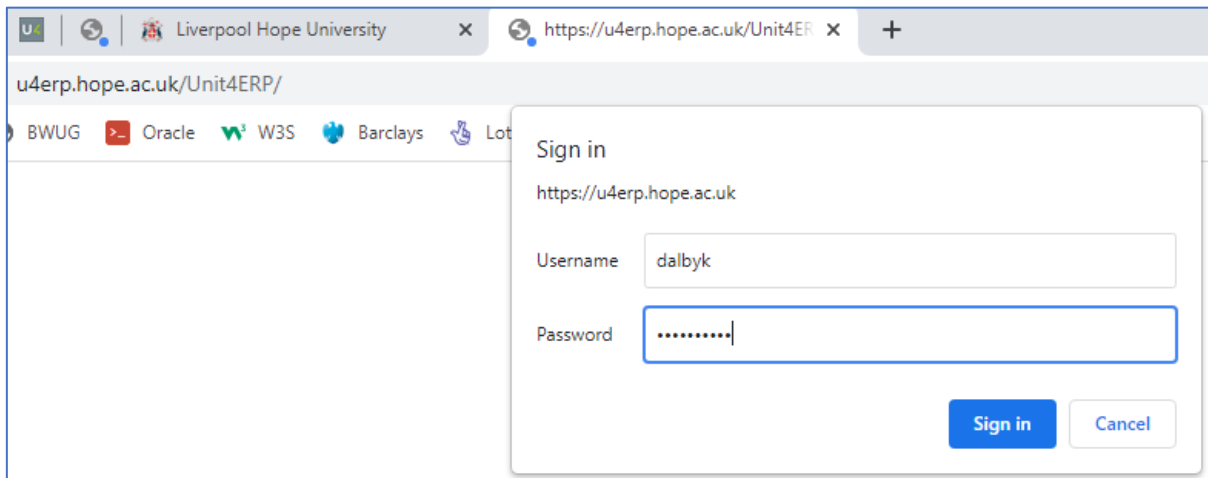


The icon will appear on the desktop but may look different depending on the default browser

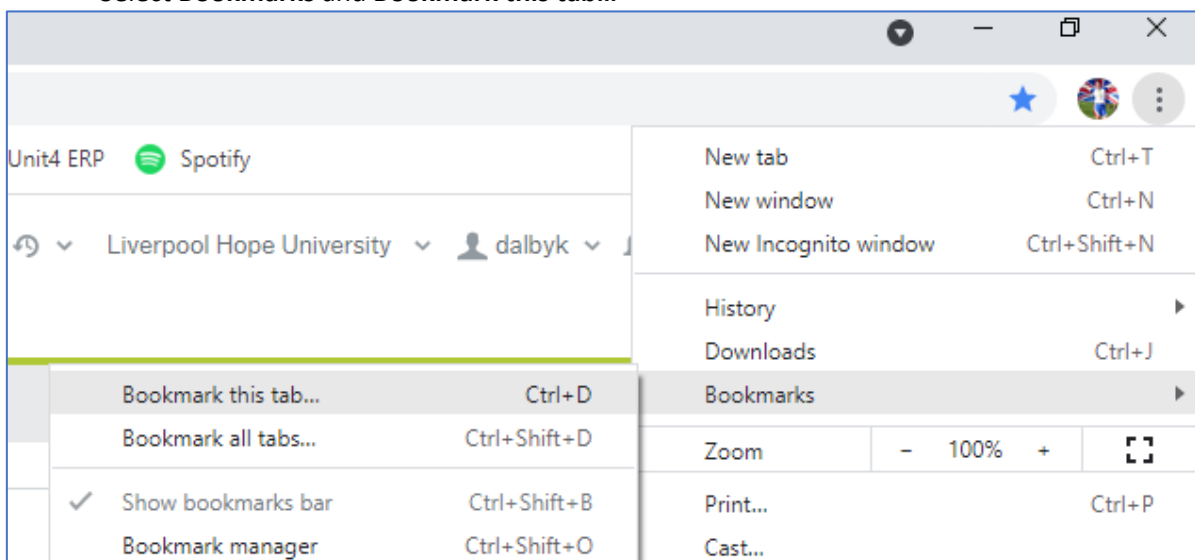


(Alternatively) Create a Bookmark for U4ERP Web.

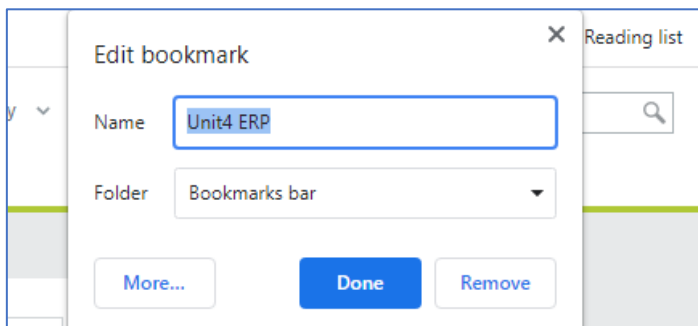
Enter the link into the browser and sign in
[Homescreen menu - Unit4 ERP](#)



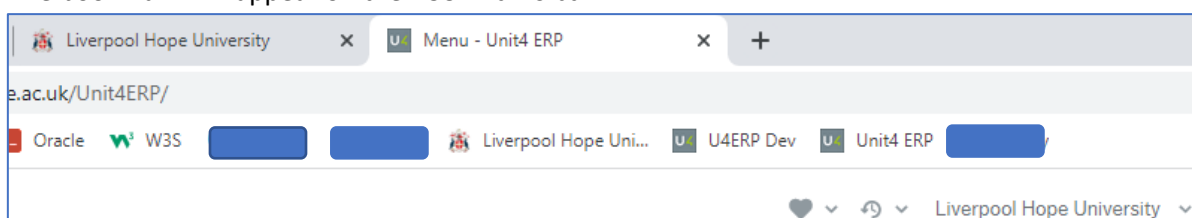
- Click in the three dots in the top right corner of the screen
- Select **Bookmarks** and **Bookmark this tab...**



Enter a name for the bookmark and select the **Folder 'Bookmarks bar'**

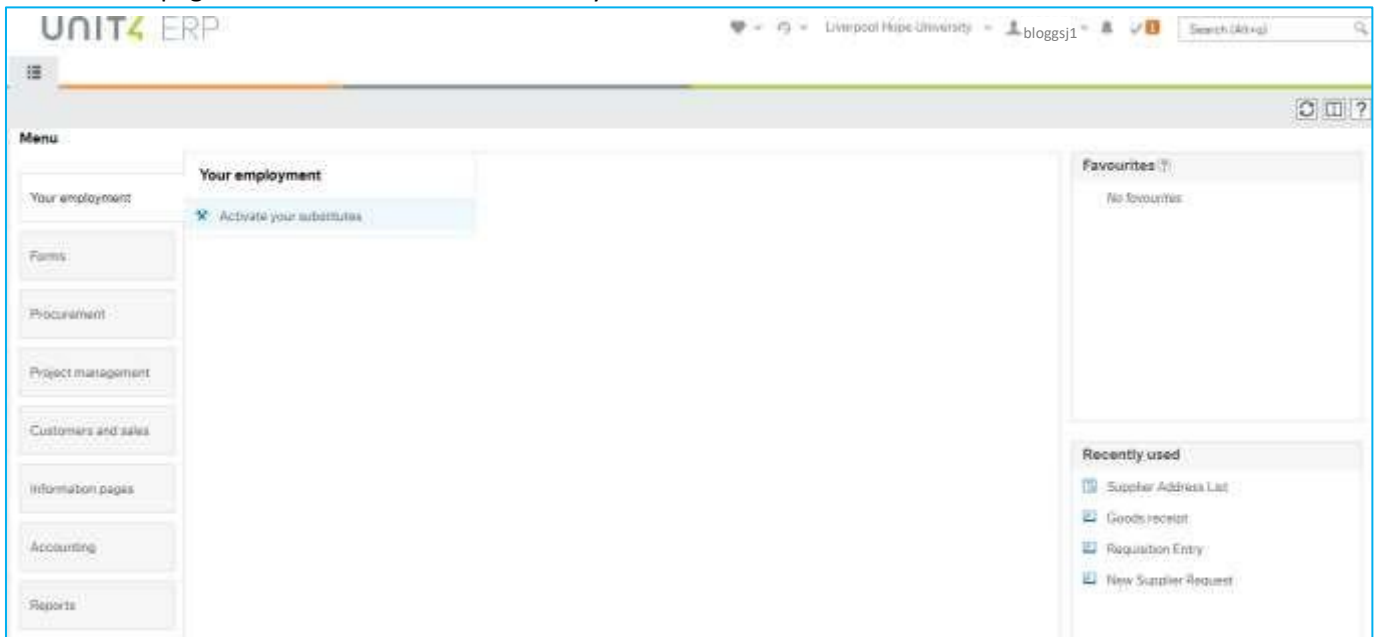


The bookmark will appear on the **Bookmarks bar**



Using Unit4

Your start page will look similar to this: but may have different menu items.



Top bar icons:



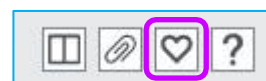
Favourites (also shown in the top box on the right-hand side of the screen)

Recently used screens (also shown in the bottom box on the right-hand side of the screen)

Tasks: the number indicates the number of tasks to be actioned, click to see list

Search function: enter relevant search / word to find windows

Items can be added to Favourites by clicking on *Add to Favourites* in the top right corner of any screen.



in the top right

Activate Substitutes

NOTE: This facility can only be used once a user has been assigned a substitute, or substitutes to select from. Please contact Karen Dalby (3867) to set this up.

Assigned substitutes will be shown in a list, along with available dates (often just a start date with no end date). A user can then select and activate one or more substitutes to receive their tasks for the period specified. The tasks continue to go to the original user also.

To assign a substitute

- Change the *Absence status* to 'I am currently out of the office'
- Enter the dates of absence.
- Tick one or more of the available substitutes

All tasks sent to you will also go to the selected substitutes during the absence period.

The screenshot shows a web application titled 'Activate your substitutes'. It contains two main sections: 'Substitute date range' and 'Substitutes'.

Substitute date range section:

- WF user: KD (Karen Dalby (KD))
- Absence status*: A dropdown menu with 'I am currently in the office' selected. An annotation points to this dropdown with the text: 'Change the Absence status to 'I am currently out of the office''.
- Absence date from: [Empty text box]
- Absence date to: [Empty text box]. An annotation points to this field with the text: 'Enter the dates of absence'.

Substitutes section:

- Show only valid substitutes: [Unchecked checkbox]
- A table with columns: Substitute, Valid from, Valid until.
- Row 1: Fred Smith, 10/11/2019, [Empty]. An annotation points to the 'Fred Smith' entry with the text: 'Tick one or more substitutes on the list'.
- Row 2: [Empty], [Empty], [Empty].

At the bottom of the 'Substitutes' section are 'Add' and 'Delete' buttons.

At the bottom of the entire form are 'Save', 'Clear', and 'Export' buttons.

Annotations also point to the 'Valid from' and 'Valid until' columns with the text: 'Dates substitutes are available from and to'.

Further guidance and support

- Further guidance and support can be found at
 - <https://www.hope.ac.uk/gateway/staff/stafffinance/financesystem-u4erpagresso/>