

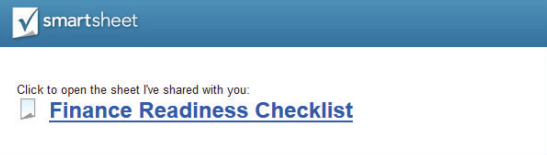
Signing in for the First Time

The Readiness Checklist tool runs on Smartsheet. Smartsheet is similar to Excel, but requires no prior experience with Excel.

To gain access to your checklists, the Change Management team will share a sheet with you. Once a sheet is shared, you will receive an email from Smartsheet with a link to that sheet.

The first time a sheet is shared with you, you will need to create a Smartsheet account. Click the link in the email from Smartsheet and you will be prompted to create a password. Enter your chosen password and click **Continue** to view your sheets.

You will receive an email when a sheet is shared with you. Click the link to view the sheet.



Using Smartsheet

Action	Owner	Target Date	Status	Notes
FINANCE				
Ongoing				
5 Months Before Go-Live				
Post train-the-trainer classes so that campus trainers and TIPs can register	ConnectCarolina Change Mgmt	04/01/14		
Book facilities for school/division-delivered training	Campus Trainer	05/01/14	0%	
Meet with Change Management Team to prepare ABCSignup, the training registration tool, to meet your school/division's needs	TIP, Campus Trainer, Change Management	05/01/14	25%	
Develop a plan for offering make-up sessions, for when training participants have to miss a class unexpectedly	TIP, Campus Trainer	05/01/14	50%	
Post Change Management-delivered classes on ABCSignup (the training registration tool)	Change Management	05/01/14	75%	
Make and communicate a plan for staff vacations during training and go-live	MOU Lead	05/01/14	100%	
Work with internal staff who are getting departmental systems ready to interface with ConnectCarolina to ensure that the file is tested.	MOU Lead	05/01/14		
Refresh list of ConnectCarolina users that was prepared in 2013.	MOU Lead	05/01/14		
4 Months Before Go-Live				
3 Months Before Go-Live				
2 Months Before Go-Live				
1 Month Before Go-Live				
By Go-Live				
ADD MORE ACTIONS				
ADD MORE ACTIONS				

View suggested tasks to prepare for ConnectCarolina go-live.

Feel free to edit and add action owners.

Add notes or comments for your own use.

Click to share sheet - see page 2 for details.

If needed, you can attach files to an action.

Use the discussion column to chat about actions.

If the Change Management team changes a task, it will be flagged here for a few weeks.

These are shared tasks, so you can't change them. But if you think something needs to be changed, email anita_collins@unc.edu.

Drop down lets you set a status towards completion.

Suggested target dates.

Add your own actions. These are not shared with others.

Sharing a Sheet

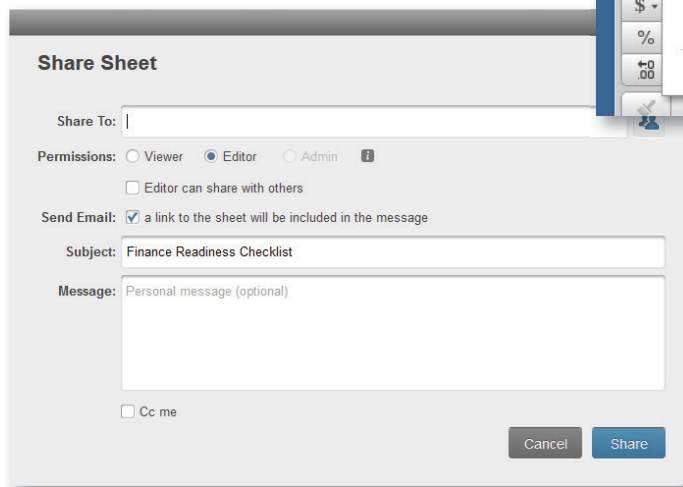
To share a sheet with a colleague, click the document button at the top left and select **Share**. Enter your colleague's email address and select an appropriate level of permission:

Editor (may share): Can make changes to the sheet and share the sheet with others.

Editor (may not share): Can make changes to the sheet but may not share the sheet with others.

Viewer: Cannot make changes to or share a sheet.

Add a personal message, if you wish, then click on the **Share** button.



Share Sheet

Share To: |

Permissions: Viewer Editor Admin ⓘ

Editor can share with others

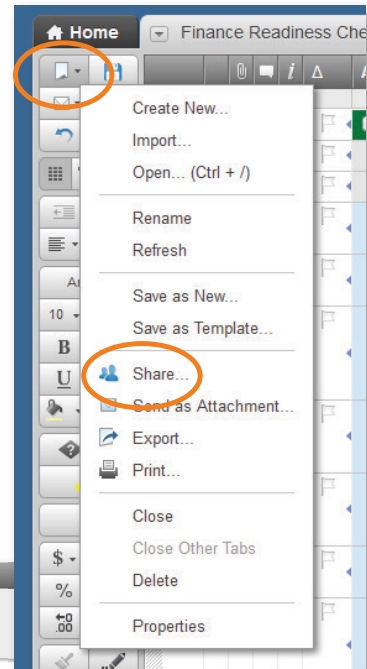
Send Email: a link to the sheet will be included in the message

Subject: Finance Readiness Checklist

Message: Personal message (optional)

Cc me

Cancel Share



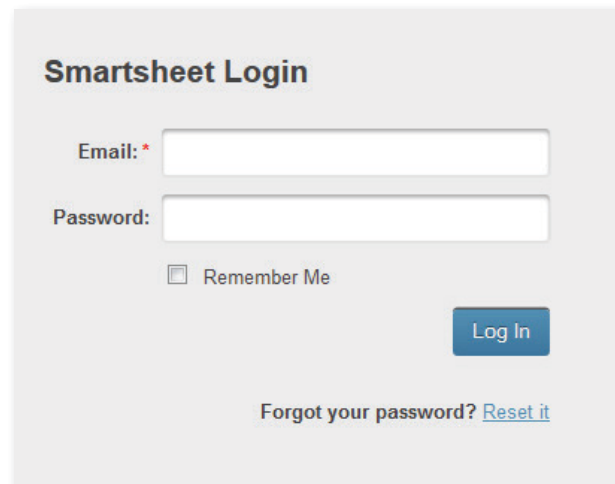
Collaborating

Multiple users can edit a sheet at the same time. SmartSheet provides notification messages when a sheet is being viewed by one or more other users, and will prompt you to refresh a sheet any time another user updates a sheet you are currently viewing.

Logging In

Once you have created your account after receiving a shared sheet, access your sheets anytime by going to <http://www.smartsheet.com> and logging in using your email address and password.

You can also access your sheets from the Go-Live tab on the <http://ccinfo.unc.edu> website.



Smartsheet Login

Email: *

Password:

Remember Me

Log In

Forgot your password? [Reset it](#)