

**From:** [Collins, Anita Wright](#)  
**To:** [ConnectCarolina Finance TIPS and Trainers](#)  
**Cc:** [Arnold, Becky](#); [Kelly-Scholle, Janet](#); [Ulmer, Kirk Patrick](#); [Minter, Christopher M](#); [Patel, Reena Lalit](#); [Huggins, Kelleigh](#); [Sebik, Nicole](#); [Ryan, Timothy John](#); [Cadman, Cindy Lynn](#); [Harris, Allyson Cheryl](#); [Beller, Debra L](#)  
**Subject:** Update for TIPS and Trainers  
**Date:** Wednesday, August 20, 2014 6:19:55 PM

---

Hi Finance TIPS and trainers,

**IMPORTANT: Be Sure to Register Everyone for Classes by September 1**

Please be sure to register everyone for all your training classes by **September 1**. On September 1, the Security Team will pull everyone who is registered for training and perform the first part of the access process. So again, everyone who needs access to the system needs to be registered by September 1.

**Please Test Training IDs Before Class**

Before teaching your first class, please run through all the demos and practices in the class with one or two of your training IDs (the “student01” IDs). If you find any glitches, let me know and I’ll get them fixed. It’s also a good idea to ask your participants to sign in to the training environment in advance to see if they have the sign-on box:



If someone doesn’t have the sign-on box in class, you can sign on for them as a temporary workaround. Then send me the person’s Onyen, and I’ll get it fixed for future classes.

**CBT Signups**

Look for an email this week on how to register your attendees for computer-based training. We’ll send you a spreadsheet that asks you to enter names and PIDs, and then mark which courses each person needs to attend.

**Administering Workflow and Approvals Workshop**

We’ve added a third session of the Administering Workflow and Approvals workshop. Rather than a traditional class, this session is a hands-on workshop to let you view and update how workflow is configured for your organization, and let you change who approves transactions. If you will be administering workflow for your organization, you can sign up here: [Sign Up Here](#)

**Budgets Info**

Here are some notes from Nicole Sebik, our intrepid trainer of budgets and fund swaps and many other things:

**NO NEED TO CREATE BUDGETS FOR TRAINING**

Good news! All budget definitions in TRN have been set to “track without budget.” That means you will not get errors based on insufficient funds. That also means you don’t have to create budgets for your training classes. However, if you’re planning to use OSR funds in training, be sure to read the

next section.

FYI – You can still create errors for your classes to resolve by failing chartfield rules (using an SPA account on an EPA employee, for example) or combo-edit (incorrect Fund/Source combinations, for example).

### ARE YOU PLANNING TO USE OSR FUNDS DURING TRAINING?

In order for OSR budgets to pass budget checking, a “tweak” is required. If you are planning to use OSR funds for any of your training, email [Nicole Šebik](#) a list of the Project IDs you plan to use. She will update the budget controls. Nicole will do this in two rounds: Friday, 8/22 and Friday, 8/29.

### ADDING FAVORITES IN CONNECTCAROLINA

We confirmed today that adding an ePAR form as a favorite will produce errors (if not immediately, down the road). We continue to recommend that users create and use Favorites. In the case of ePAR forms, the best practice is to add the ePAR home page to your Favorites. Please share this information with those in your Funding Swaps/Lump Sum Payments classes.



.....

### Anita Collins

Change Management Senior Analyst, PMP  
919-843-3986

<http://ccinfo.unc.edu>

University of North Carolina at Chapel Hill  
211 Manning Dr., CB #3420  
Chapel Hill, NC 27599