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**Subject:** update for Finance TIPS and Trainers  
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Hello Finance TIPS and Trainers,

The change management team has been working hard preparing for training (as I'm sure you are too), and we have some updates for you. If you have questions about any of this, we have an optional Campus Working Group/TIP and Trainer meeting on Tuesday afternoon to answer any and all questions.

### **Materials on SharePoint**

We are putting both PDF and Word versions of the training guides on SharePoint, along with the instructor notes, PowerPoints, and practice booklets. You can find the materials here (they are being added all this week):

[Instructor Materials on SharePoint](#)

*Note: Be sure to use Internet Explorer to go to SharePoint.*

### **Getting Printed Materials**

Please send your requests for printed materials to Stephanie Ellis ([sfellis@email.unc.edu](mailto:sfellis@email.unc.edu)), our Training Logistics Coordinator. The print shop would like a week's notice, but if you have your training schedule done and can send us a spreadsheet of sessions and number of attendees for each, that would really help us plan. We are using an internal print shop, and while they are great to work with, they are not as large as external print shops. We will need to prioritize the printing by class date.

### **Training Environment and Generic IDs**

If you have your list of generic training IDs from the Training Fundamentals class, the first one on the list is now functional (type it in as all lowercase letters). You can sign on with the password [redacted]. So the way you sign in is to first sign on as yourself in the single sign-on window, and then sign in with the generic ID.

We are working hard to test these IDs and work through the glitches this week, and then to make all the copies of the IDs you need. If you have the chance to test your ID and let me know if you find problems, that would be a help.

### **Updated Training Schedules**

We have added locations and times to the training schedules, plus the following paragraphs talk about some updates to training schedules. You can find updated training schedules here:

[Training Schedules on SharePoint](#)

### **Kenan Center for Some Sessions First Two Weeks of August**

When the project date changed, some of the classrooms at the Center for School Leadership were booked when we needed them. So we have booked Kenan Center (by the Kenan-Flagler Business School) for two weeks in August. Only some of the training will be in Kenan—check your training schedules to see if any of yours are.

A note about parking at Kenan: Kenan does not have free parking, so please plan to use alternate transportation for those training sessions.

### **Reporting Information Sessions**

There's been a change in strategy for reporting, and InfoPorte will be the tool we use to deliver all reporting for campus. (As a reminder, the training for reporting will be delivered through self-paced computer-based training.) With this change in mind, we have restructured the large-venue demos to be focused on InfoPorte, and we have combined them to introduce both HR and Finance reporting. The dates for the new large venue reporting demos are here:

<http://ccinfo.unc.edu/training/live-demos/>

### **Managing Budgets for MOU Leads**

We will send an announcement for sign-ups for this class to MOU leads this week.

### **Managing Workflow and Approvers Class**

After talking with the team who is configuring workflow, we decided that rather than a class, we really needed a two-hour working session to allow MOU leads to review the workflow set up for their units and to make changes if needed. So we have restructured to offer a two-hour session for MOU leads to do that—and the session will be run by the workflow team. We'll be publishing the sessions in ABC Signup this week, and will send an invitation for signups to the MOU leads.

### **Capital Improvements Class**

For those of you who had the Projects for Construction Audiences class on your calendar, this class has been removed. The audience for this part of ConnectCarolina is a very small one, and this training will be handled informally.

### **Computer-Based Training (CBT) Website and CBT Prerequisites**

The website that will allow us to give you access to the computer-based training is ready to go—as soon as we have CBTs on it, we will add the link to the training page on the ccinfo.unc.edu website and will let you know it's there. The prerequisite CBTs are in the final stages—we are recording the voice narration and we expect them to be posted by the end of this week.

If you really want to get the prerequisites out there sooner—feel free to use the recorded webinars here instead. We are not tracking who takes the prerequisites, and the content is very similar (although the CBTs will function better as training): <http://ccinfo.unc.edu/about/webinars/>

Okay, I know that was a long update—thank you for hanging in there. I hope to see you Tuesday afternoon at the optional meeting.

--Anita



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