Dave Yost • Auditor of State

TO: **UAN ACCOUNTING & PAYROLL USERS**

FROM: **UAN SUPPORT**

DATE: **AUGUST 31, 2012**

SUBJECT: **TRAINING CLASSES FOR NEW UAN ACCOUNTING & PAYROLL SOFTWARE**

You are receiving this memo because we have deemed that you are an Accounting & Payroll UAN user (currently using UAN version 16.1). If this is incorrect please contact UAN Support at 1-800-833-8261.

The new UAN Accounting & Payroll software will go live on January 1, 2013 for all Accounting & Payroll users. To aid you in the transition from the current UAN application to the new application UAN will be conducting training that will guide you through the new functionality and features of the application as well as prepare you for the data conversion. The training is available in several formats. The choice of the training format is yours and be assured that the content of the training will be identically independent of the presentation format selected.

The completion of this training is mandatory. The UAN version 2013.1 will not be sent to any entity that does not complete both the accounting and payroll training sessions.

While the new application training is being conducted UAN will be offering a method for you to ask UAN questions specific to the new application training. This knowledge base system, which will be accessible through the UANLink, will provide a means for UAN to share questions and answers to all UAN clients. UAN will not be identifying any detail on who submitted questions. Additional information on the knowledge base system will be forthcoming around October 15th.

The accounting and payroll modules will be taught independently and each will consist of approximately 7 hours of class time. There is no specific order to complete the sessions so you may take either the accounting or payroll session first. The following sections provide detail on the three training options, Self Study, On-line and Classroom, to aid you in deciding which format is best for you:

Self Study Training

- Self Study allows clients to learn the new software applications at their own pace and clients can set their own schedule.

- Those who participate in self study will be provided a DVD containing the identical training courses and a hardcopy of the identical training booklets used in class. The DVD will be able to be run on any windows based PC.

  Please note: *We will begin to mailing the self study training materials in late October.*

- Participants will be able to submit questions to UAN via the UANLink and will receive responses through the UANLink and e-mail. In addition, it will be a resource to review the questions from other clients and the answers from UAN. UAN will not be identifying who submitted questions.

Classroom Training

- Traditional classroom training will be held at the following location:

  UAN Training Room
  88 East Broad Street, 9th Floor
  Columbus, Ohio 43215
  (800) 833-8261
  http://uanlink.auditor.state.oh.us/pdf/uan_win_software/DirectionsUANTrainingCenterParkingHotelInformation.pdf.

- The full day sessions will be from 9:00 AM to 5:00 PM with a 1 hour lunch break. We will be available for an additional 1/2 hour (from 5:00 – 5:30) after the class concludes to address individual questions.

  Please note: *The accounting and payroll courses (for the traditional classroom and on-line training) will not have to be taken on consecutive days; meaning that you will be able to, for example, participate in the accounting course in October and not take the payroll course until December if you choose.*

On-Line Training

- On-line training will be conduct over the internet.

- The content and material will be identical to the traditional classroom training; however the method to perform exercises will be slightly different.

- The on-line training class is available for you to take anywhere you have a high speed internet connection, and the computer does not necessarily have to be your UAN computer (but it can be).

- For those entities that have not participated in a previous on-line session with UAN a microphone will be shipped to your entity at no charge, as a

microphone will be required. Instructions on how to connect to the online training will be provided once you are registered for class. Speakers are also required and all entities were provided with speakers as part of the UAN system.

- We will open each on-line session 1 hour prior to the beginning of the class. The purpose of this is to allow any attendee that has not previously participated in an on-line training class to verify your system is working correctly. UAN Tech Support will be available if problems are encountered. This verification only takes a couple of minutes so you are able to join any time during that hour.

- The full day sessions will be from 9:00 AM to 5:00 PM with a 1 hour lunch break. We will be available for an additional 1/2 hour (from 5:00 – 5:30) after the class concludes to address individual questions.

- Evening sessions are offered over the course of one week e.g. the courses will be taught over several days from 6:00 PM to 8:00 PM.

  Please note: *The accounting and payroll courses (for the traditional classroom and on-line training) will not have to be taken on consecutive days; meaning that you will be able to, for example, participate in the accounting course in October and not take the payroll course until December if you choose.*

  Please note: *Your training confirmation email will contain a link to access the on-line training, so please do not discard the email until the training course has been completed.*

Training Schedule

Please note: *The classroom and on-line training sessions have limited capacity. If multiple individuals from your entity will be attending the classroom training, you may be required share a computer.*

Please note: *Registration is first come first served so we recommend if you find a date that fits your schedule that you register for the course as early as possible. Sessions that are full will not appear when register for the classes.*

- The following two tables contain the schedules for the classroom and on-line sessions for the Accounting and Payroll courses. There are differences between the Accounting and Payroll schedules so please ensure that you are referring to the correct schedule.

ACCOUNTING

Classroom			On-line		
Date	**Day**	**Time**	**Date**	**Day**	**Time**
15-Oct	Monday	9:00 am - 5:00 pm	15-Oct	Monday	9:00 am - 5:00 pm
16-Oct	Tuesday	9:00 am - 5:00 pm	16-Oct	Tuesday	9:00 am - 5:00 pm
17-Oct	Wednesday	9:00 am - 5:00 pm	17-Oct	Wednesday	9:00 am - 5:00 pm
18-Oct	Thursday	9:00 am - 5:00 pm	18-Oct	Thursday	9:00 am - 5:00 pm
19-Oct	Friday	9:00 am - 5:00 pm	19-Oct	Friday	9:00 am - 5:00 pm
20-Oct	Saturday	9:00 am - 5:00 pm	20-Oct	Saturday	9:00 am - 5:00 pm
			Oct 15 - Oct 19	Evenings	6:00 pm - 8:00 pm
22-Oct	Monday	9:00 am - 5:00 pm	22-Oct	Monday	9:00 am - 5:00 pm
23-Oct	Tuesday	9:00 am - 5:00 pm	23-Oct	Tuesday	9:00 am - 5:00 pm
24-Oct	Wednesday	9:00 am - 5:00 pm	24-Oct	Wednesday	9:00 am - 5:00 pm
25-Oct	Thursday	9:00 am - 5:00 pm	25-Oct	Thursday	9:00 am - 5:00 pm
26-Oct	Friday	9:00 am - 5:00 pm	26-Oct	Friday	9:00 am - 5:00 pm
			Oct 22 - Oct 26	Evenings	6:00 pm - 8:00 pm
29-Oct	Monday	9:00 am - 5:00 pm	29-Oct	Monday	9:00 am - 5:00 pm
30-Oct	Tuesday	9:00 am - 5:00 pm	30-Oct	Tuesday	9:00 am - 5:00 pm
31-Oct	Wednesday	9:00 am - 5:00 pm	31-Oct	Wednesday	9:00 am - 5:00 pm
1-Nov	Thursday	9:00 am - 5:00 pm	1-Nov	Thursday	9:00 am - 5:00 pm
2-Nov	Friday	9:00 am - 5:00 pm	2-Nov	Friday	9:00 am - 5:00 pm
3-Nov	Saturday	9:00 am - 5:00 pm	3-Nov	Saturday	9:00 am - 5:00 pm
			Oct 29 - Nov 2	Evenings	6:00 pm - 8:00 pm
5-Nov	Monday	9:00 am - 5:00 pm	5-Nov	Monday	9:00 am - 5:00 pm
6-Nov	Tuesday	9:00 am - 5:00 pm	6-Nov	Tuesday	9:00 am - 5:00 pm
7-Nov	Wednesday	9:00 am - 5:00 pm	7-Nov	Wednesday	9:00 am - 5:00 pm
8-Nov	Thursday	9:00 am - 5:00 pm	8-Nov	Thursday	9:00 am - 5:00 pm
9-Nov	Friday	9:00 am - 5:00 pm	9-Nov	Friday	9:00 am - 5:00 pm
			Nov 5 - Nov 9	Evenings	6:00 pm - 8:00 pm
13-Nov	Tuesday	9:00 am - 5:00 pm	13-Nov	Tuesday	9:00 am - 5:00 pm
14-Nov	Wednesday	9:00 am - 5:00 pm	14-Nov	Wednesday	9:00 am - 5:00 pm
15-Nov	Thursday	9:00 am - 5:00 pm	15-Nov	Thursday	9:00 am - 5:00 pm
16-Nov	Friday	9:00 am - 5:00 pm	16-Nov	Friday	9:00 am - 5:00 pm
17-Nov	Saturday	9:00 am - 5:00 pm	17-Nov	Saturday	9:00 am - 5:00 pm
			Nov 13 - Nov 16	Evenings	6:00 pm - 8:30 pm
26-Nov	Monday	9:00 am - 5:00 pm	26-Nov	Monday	9:00 am - 5:00 pm
27-Nov	Tuesday	9:00 am - 5:00 pm	27-Nov	Tuesday	9:00 am - 5:00 pm
28-Nov	Wednesday	9:00 am - 5:00 pm	28-Nov	Wednesday	9:00 am - 5:00 pm
29-Nov	Thursday	9:00 am - 5:00 pm	29-Nov	Thursday	9:00 am - 5:00 pm
30-Nov	Friday	9:00 am - 5:00 pm	30-Nov	Friday	9:00 am - 5:00 pm
			Nov 26 - Nov 30	Evenings	6:00 pm - 8:00 pm
10-Dec	Monday	9:00 am - 5:00 pm	10-Dec	Monday	9:00 am - 5:00 pm
11-Dec	Tuesday	9:00 am - 5:00 pm	11-Dec	Tuesday	9:00 am - 5:00 pm
12-Dec	Wednesday	9:00 am - 5:00 pm	12-Dec	Wednesday	9:00 am - 5:00 pm
13-Dec	Thursday	9:00 am - 5:00 pm	13-Dec	Thursday	9:00 am - 5:00 pm
14-Dec	Friday	9:00 am - 5:00 pm	14-Dec	Friday	9:00 am - 5:00 pm
			Dec 10 - Dec 14	Evenings	6:00 pm - 8:00 pm

PAYROLL

Classroom			On-line		
Date	**Day**	**Time**	**Date**	**Day**	**Time**
15-Oct	Monday	9:00 am - 5:00 pm	15-Oct	Monday	9:00 am - 5:00 pm
16-Oct	Tuesday	9:00 am - 5:00 pm	16-Oct	Tuesday	9:00 am - 5:00 pm
17-Oct	Wednesday	9:00 am - 5:00 pm	17-Oct	Wednesday	9:00 am - 5:00 pm
18-Oct	Thursday	9:00 am - 5:00 pm	18-Oct	Thursday	9:00 am - 5:00 pm
19-Oct	Friday	9:00 am - 5:00 pm	19-Oct	Friday	9:00 am - 5:00 pm
			Oct 15 - Oct 19	Evenings	6:00 pm - 8:00 pm
22-Oct	Monday	9:00 am - 5:00 pm	22-Oct	Monday	9:00 am - 5:00 pm
23-Oct	Tuesday	9:00 am - 5:00 pm	23-Oct	Tuesday	9:00 am - 5:00 pm
24-Oct	Wednesday	9:00 am - 5:00 pm	24-Oct	Wednesday	9:00 am - 5:00 pm
25-Oct	Thursday	9:00 am - 5:00 pm	25-Oct	Thursday	9:00 am - 5:00 pm
26-Oct	Friday	9:00 am - 5:00 pm	26-Oct	Friday	9:00 am - 5:00 pm
27-Oct	Saturday	9:00 am - 5:00 pm	27-Oct	Saturday	9:00 am - 5:00 pm
			Oct 22 - Oct 26	Evenings	6:00 pm - 8:00 pm
29-Oct	Monday	9:00 am - 5:00 pm	29-Oct	Monday	9:00 am - 5:00 pm
30-Oct	Tuesday	9:00 am - 5:00 pm	30-Oct	Tuesday	9:00 am - 5:00 pm
31-Oct	Wednesday	9:00 am - 5:00 pm	31-Oct	Wednesday	9:00 am - 5:00 pm
1-Nov	Thursday	9:00 am - 5:00 pm	1-Nov	Thursday	9:00 am - 5:00 pm
2-Nov	Friday	9:00 am - 5:00 pm	2-Nov	Friday	9:00 am - 5:00 pm
			Oct 29 - Nov 2	Evenings	6:00 pm - 8:00 pm
5-Nov	Monday	9:00 am - 5:00 pm	5-Nov	Monday	9:00 am - 5:00 pm
6-Nov	Tuesday	9:00 am - 5:00 pm	6-Nov	Tuesday	9:00 am - 5:00 pm
7-Nov	Wednesday	9:00 am - 5:00 pm	7-Nov	Wednesday	9:00 am - 5:00 pm
8-Nov	Thursday	9:00 am - 5:00 pm	8-Nov	Thursday	9:00 am - 5:00 pm
9-Nov	Friday	9:00 am - 5:00 pm	9-Nov	Friday	9:00 am - 5:00 pm
10-Nov	Saturday	9:00 am - 5:00 pm	10-Nov	Saturday	9:00 am - 5:00 pm
			Nov 5 - Nov 9	Evenings	6:00 pm - 8:00 pm
13-Nov	Tuesday	9:00 am - 5:00 pm	13-Nov	Tuesday	9:00 am - 5:00 pm
14-Nov	Wednesday	9:00 am - 5:00 pm	14-Nov	Wednesday	9:00 am - 5:00 pm
15-Nov	Thursday	9:00 am - 5:00 pm	15-Nov	Thursday	9:00 am - 5:00 pm
16-Nov	Friday	9:00 am - 5:00 pm	16-Nov	Friday	9:00 am - 5:00 pm
			Nov 13 - Nov 16	Evenings	6:00 pm - 8:30 pm
26-Nov	Monday	9:00 am - 5:00 pm	26-Nov	Monday	9:00 am - 5:00 pm
27-Nov	Tuesday	9:00 am - 5:00 pm	27-Nov	Tuesday	9:00 am - 5:00 pm
28-Nov	Wednesday	9:00 am - 5:00 pm	28-Nov	Wednesday	9:00 am - 5:00 pm
29-Nov	Thursday	9:00 am - 5:00 pm	29-Nov	Thursday	9:00 am - 5:00 pm
30-Nov	Friday	9:00 am - 5:00 pm	30-Nov	Friday	9:00 am - 5:00 pm
1-Dec	Saturday	9:00 am - 5:00 pm	1-Dec	Saturday	9:00 am - 5:00 pm
			Nov 26 - Nov 30	Evenings	6:00 pm - 8:00 pm
10-Dec	Monday	9:00 am - 5:00 pm	10-Dec	Monday	9:00 am - 5:00 pm
11-Dec	Tuesday	9:00 am - 5:00 pm	11-Dec	Tuesday	9:00 am - 5:00 pm
12-Dec	Wednesday	9:00 am - 5:00 pm	12-Dec	Wednesday	9:00 am - 5:00 pm
13-Dec	Thursday	9:00 am - 5:00 pm	13-Dec	Thursday	9:00 am - 5:00 pm
14-Dec	Friday	9:00 am - 5:00 pm	14-Dec	Friday	9:00 am - 5:00 pm
			Dec 10 - Dec 14	Evenings	6:00 pm - 8:00 pm

How to Register

To register on-line, please perform the following steps:

> ***Please note:*** *When registering you must select* ***both*** *the accounting and payroll courses you wish to attend. For example you will not be able to register for accounting now and at a later time register for your payroll training course.*

Step #1: Click the following link: http://uanlink.auditor.state.oh.us/.

Step #2: Select 'Profile Login'.

Step #3: Enter your user name and password then click on 'Ok'. Your user name is your four digit UAN entity identification number. Your password is the five-digit Customer Number located on your Auditor of State invoice.

Step #4: Select 'New Software Training' link. You may receive a message asking if web site 'www.auditor.state.oh.us' is a trusted site, select 'Yes'.

Step #5: You will be presented with the 'UAN New Software Training Registration' screen. From this screen you are able to modify the address where training material will be sent for those choosing self study or an online session. You will also select your type of training. After entering the requested information, select Continue.

> ***Please note:*** *The address field will populate with your current address UAN has on file. If you change the default address, it will affect where the training material will be mailed but it will not permanently change the address which other correspondence e.g. software releases are mailed. If you need to permanently change your contact information please use the Update Entity Profile Information page located at the UANLink's Profile Login.*

> ***Please note:*** *The Training Type selected will be used for* ***both*** *training courses. For example if you select Classroom / On-line training you will register for a classroom or online session for both the accounting and payroll courses.*

Step #6: For those who selected 'Self Study' from Step #6, proceed to Step #8.

If you selected 'Classroom / Online Training' the next screen will be the 'Accounting Registration' screen. Enter the requested information and select the Classroom or Online accounting course you want to attend. The required fields are outline in red. The registration cannot be completed if any of the required

fields are left blank. After entering the required information and selecting an accounting course, select 'Continue'.

Step #7: From 'Payroll Registration' screen enter the requested information and select the Classroom or Online payroll course you want to attend. After entering the required information and selecting a payroll course, select 'Continue'.

Step #8: From the 'Registration Confirmation' screen verify that your contact information and course selections are correct. If the information is correct, select 'Submit'. If your contact information and/or course selection is incorrect, select 'Change'. The application will allow you to make any necessary revisions.

> ***Reminder:*** *After you select 'Submit' if you need to make a revision or cancel a course, you will need to contract the UAN Support Line for assistance.*

Step #9: Close the web page once you have successfully submitted your registration, a confirmation email will be delivered within 24 hours.

> ***Reminder:*** *If you registered for an online training class, please retain the confirmation email until you complete the training course. The confirmation email will contain a specific link for the course. Each course uses its own specific link.*