Training Courses FAQ

EPSi® Advanced Training

Frequently Asked Questions

Registration FAQ's

How do I sign up for EPSi's live, instructor-led, trainings?

Log in to EPSi University at training.stratadecision.com with your username and password. Once inside EPSi U, click on the **Quick Link** tile named **Centralized Training Registration**.

(For more detailed instruction, see the document located on the website HERE named *EPSi Training Sign Up GUIDE*)

I need a username and password for EPSi University, how can I request one?

Fill out this FORM

What if I can't make the class date posted, when is it offered again?

Each of the Advanced Trainings are offered once per quarter.

When are the next quarter's classes posted on the Strata website for EPSi Advanced Training?

- Q1 (January, February, March) Courses are posted the third Tuesday of November.
- Q2 (April, May, June) Courses are posted the third Tuesday of February.
- Q3 (July, August, September) Courses are posted the third Tuesday of May.
- Q4 (October, November, December) Courses are posted the third Tuesday of August

Will there be any other trainings beyond Advanced Budgeting, Advanced Costing Methods and Advanced Product Line Analysis (PLA) offered?

No, previously recorded training sessions and training materials from the past several years can be viewed on-demand in EPSi University. Once you are logged in, simply search by the product module in the search bar at the top. The search bar will appear once you click/hover over the magnifying glass icon in the upper right corner of the screen.

I am looking for a class that was offered last year (PLA Intensive, Budget Manager Intensive, Cost Manager Intensive, Clinical Insights, Contract Modeling, Strategic Product Budgeting, Data & System Administration, PLA Reporting or Benchmarking & Productivity) where or when can I sign up to attend this class?

All of the previous offerings from the past several years have all been recorded and can be consumed on-demand at EPSi University at training.stratadecision.com. Based on client feedback, our own internal resource constraints, and decreased class attendance, it appeared that we needed to update our class offerings. Based on our client's suggestions, we have determined that our users are craving new, more advanced, and less time-consuming instructor led training.

When does registration close?
Class **registration closes three days prior** to the date of the course, typically the Friday morning of the previous week. This is to ensure each participant has adequate time to obtain access to their TEST database/environment for class in order to practice in the training scenarios.

What is the cancellation policy?
Our training classes are in high demand; however, we understand that things come up. As a courtesy to our instructors and other attendees on the **waitlist**, please notify us ASAP at epsiu.help@stratadecision.com. In addition, please keep in mind that we reserve the right to cancel scheduled classes due to low enrollment or attendance.

How many people must be pre-registered for a scheduled class to occur? What is considered the class minimum enrollment number?
The class minimum enrollment number is 10 participants. If less than 10 have pre-registered, the training will be cancelled.

I just registered for training, but I received a notification that I have been _waitlist_ed. What does this mean?
The registration system's class maximum has been set at 30 participants, so when registration exceeds 30 you will automatically be placed on a **waitlist**. However, last minute cancellations can occur and those higher on the waitlist will take precedence. So please sign up early.

Pre-Requisite FAQs

Do I need to take the advanced training class before I take the assessment?
Yes, the class and assessment are part of a curriculum, one cannot be completed without the other. Taking the class is the first step, and then you can take the assessment.

Do I need to complete any pre-requisites before attending the advanced class?
Yes, It is required that attendees take the required pre-req course(s) on demand in EPSi University before taking any Advanced courses. In addition, the pre-req class assessment(s) must be passed with a grade of 80% or higher.

What are the pre-requisite classes for the Advanced EPSi trainings?
- Advanced Budget - Intro to Budget or Budget Manager Intensive
- Advanced Costing Methods - Intro to Cost or Cost Manager Intensive
- Advanced Product Line Analysis (PLA) - Intro to PLA or PLA Intensive

Is there a test for the pre-requisite classes?
Yes, and you must obtain an 80% or higher on this assessment

I have been using EPSi in my job every day for the past several years and I know the system well. Do I have to take the pre-requisites?
Exceptions to the pre-requisite requirement can be accommodated given proof of extensive product knowledge based on job history, please contact epsiu.help@stratadecision.com for details.

Other Common FAQs

How much do the various Advanced EPSi Centralized Trainings cost?

All EPSi centralized training courses, including the Advanced trainings are currently **free** of charge for EPSi users.

Are CPE credits offered like with StrataJazz training?

No, not at this time. Unlike with StrataJazz, EPSi training continues to be **free** of charge for EPSi users. In the future, If Strata decides to charge for EPSi training then we will *evaluate* offering CPE credits.

How do I make sure that I am prepared to participate in the Advanced Training(s)?

- Complete the required pre-requisite courses and pass the pre-requisite class assessment with a grade of 80% + **OR** obtain adequate proof of extensive product knowledge based on job history
- We recommend that you work only in your **TEST** environment to perform the course exercises and workshop activities on your own system and data, please work with your internal IT team to gain access PRIOR to class
- Dual monitors are recommended and helpful. If you do not have a dual monitor, a monitor large enough to split the screen will work
- We will be working with the EPSi product's most recent release to showcase our latest software enhancements. So, if your organization has not upgraded recently your system may not be fully capable of demonstrating the newest enhancements.

What is the '*Strata Support Portal*'? Is the Strata Support Portal different than EPSi University?

Yes, the Strata Support Portal it is different than EPSi U.

EPSi U is the learning management tool for the EPSi product. EPSi U is the place to go for EPSi software training and eLearning content. Click HERE to access EPSi University.

The **Strata Support Portal** (click HERE to access) is the centralized location for clients to:

- Submit Support tickets
- Review Knowledge Articles
- Contribute to the EPSi only Community Forum
- View Strata News & Announcements
- Review release notes
- View information on upcoming events
- Listen to previously recorded webinars & ShareGroup Meetings
- Interact with the EPSi Community
- Post questions to other EPSi users

I do not have access to the *Stata Support Portal*, how do I gain access?

Send the Strata Support team an email at support@stratadecison.com and request access to the portal.

How can I make sure that I am aware of EPSi related events and trainings at Strata?

Sign up for future communications and update your communication preferences at https://www.stratadecision.com/email-preferences/

What are the benefits of the Advanced Training classes?

The Advanced Training classes offer a comprehensive overview of the module you will work in on a day-to-day basis while providing hands-on system practice. Below are key benefits of obtaining Advanced Training certification.

1. Provide practical skills, processes, and tools for optimize one's ability
2. Offer real-life training examples that are applicable to a user's day-to-day tasks
3. Provide a small classroom training environment with experienced Strata staff members
4. A comprehensive training manual will be provided as part of the class, which can be used as an invaluable resource for reference year-to year to prepare for new financial processing cycles and changing system setup needs

For more information regarding EPSi training, email
epsiu.help@stratadecision.com