

EPSi Training Sign Up - GUIDE

EFFECTIVE JANUARY 1, 2022, UPDATED 7/11/2022

Enrolling in Courses

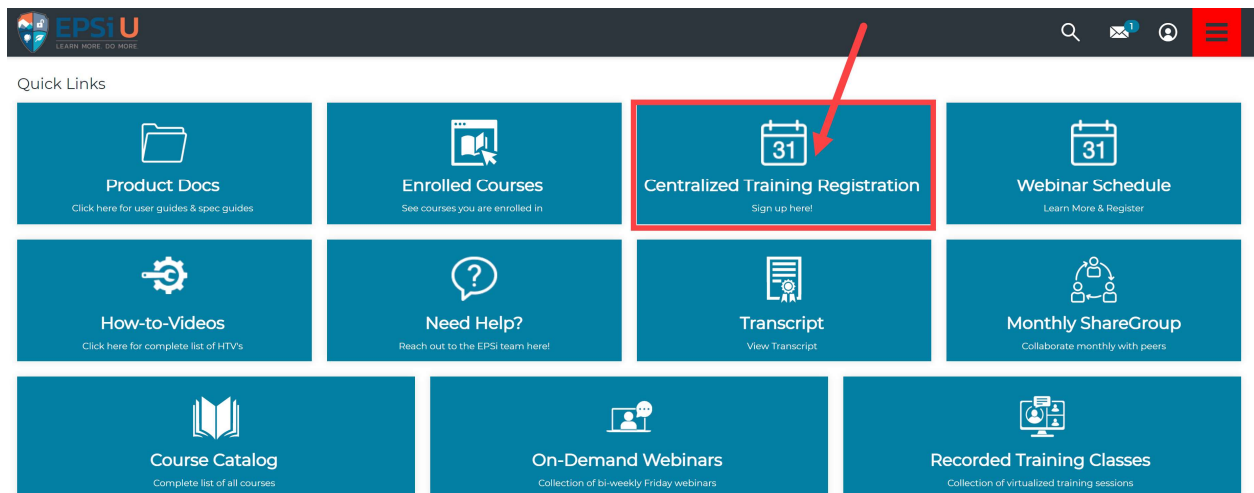
****If you don't have access to EPSi University yet, you can request access by filling out this [FORM](#).**

Access EPSi University

1. Log in to EPSi U at training.stratadecision.com with your username and password
2. If you need a username and password or if you have forgotten your username or password, fill out this [FORM](#)

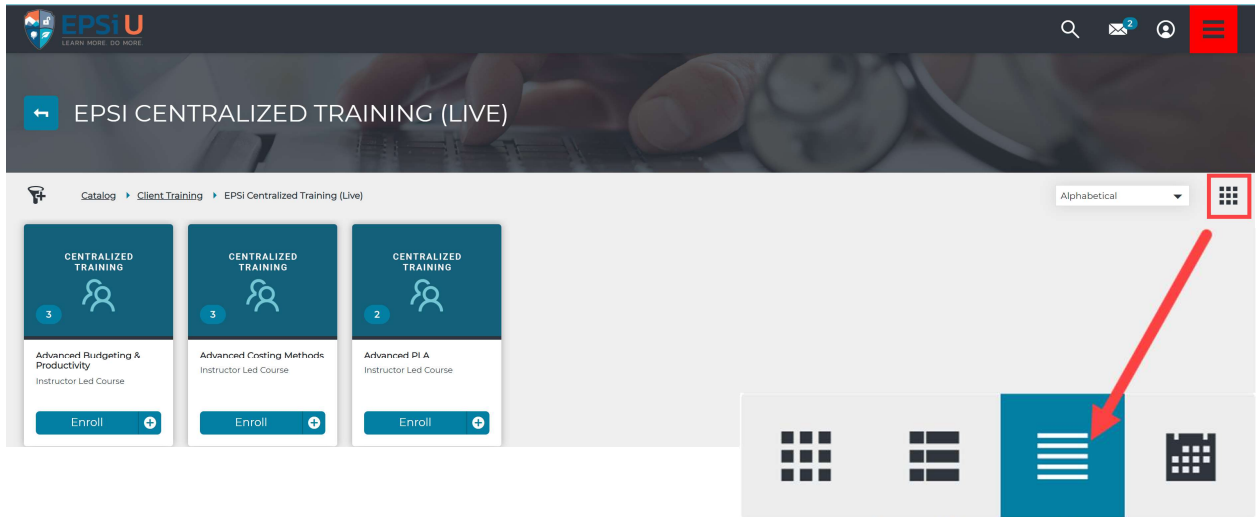
Access EPSi University

3. Once inside **EPSi U**, click on the Quick Link tile named **Centralized Training Registration**

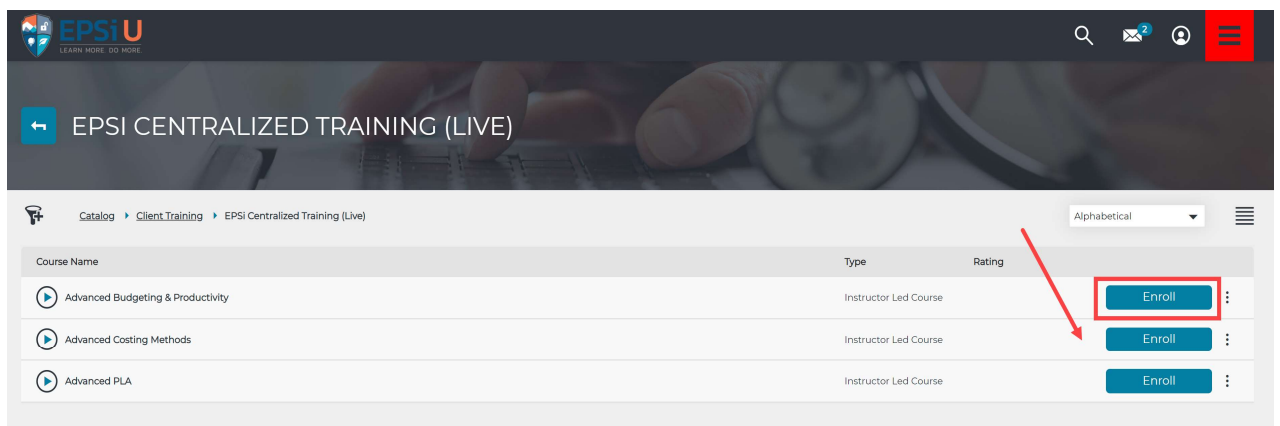


Centralized Training Registration

4. The **EPSi Centralized Training (Live)** page will open.
5. **TIP:** From the EPSi Centralized Training page, click the **'Rubik's Cube'** button in the right-hand corner and set the view to **list view** (if it's not already set) so you can more easily view the dates for each class and session.

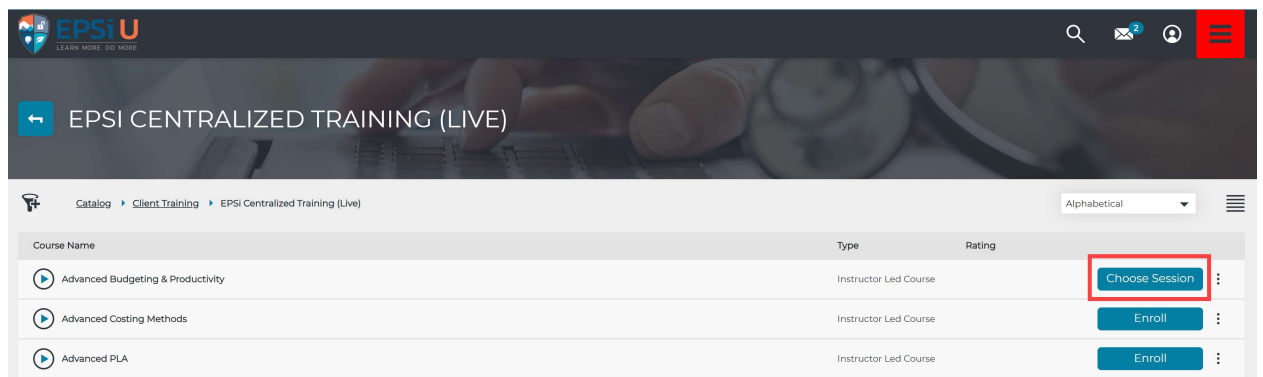


6. Select the course you'd like to sign up for by clicking the corresponding blue **Enroll** button to the right of the course name.

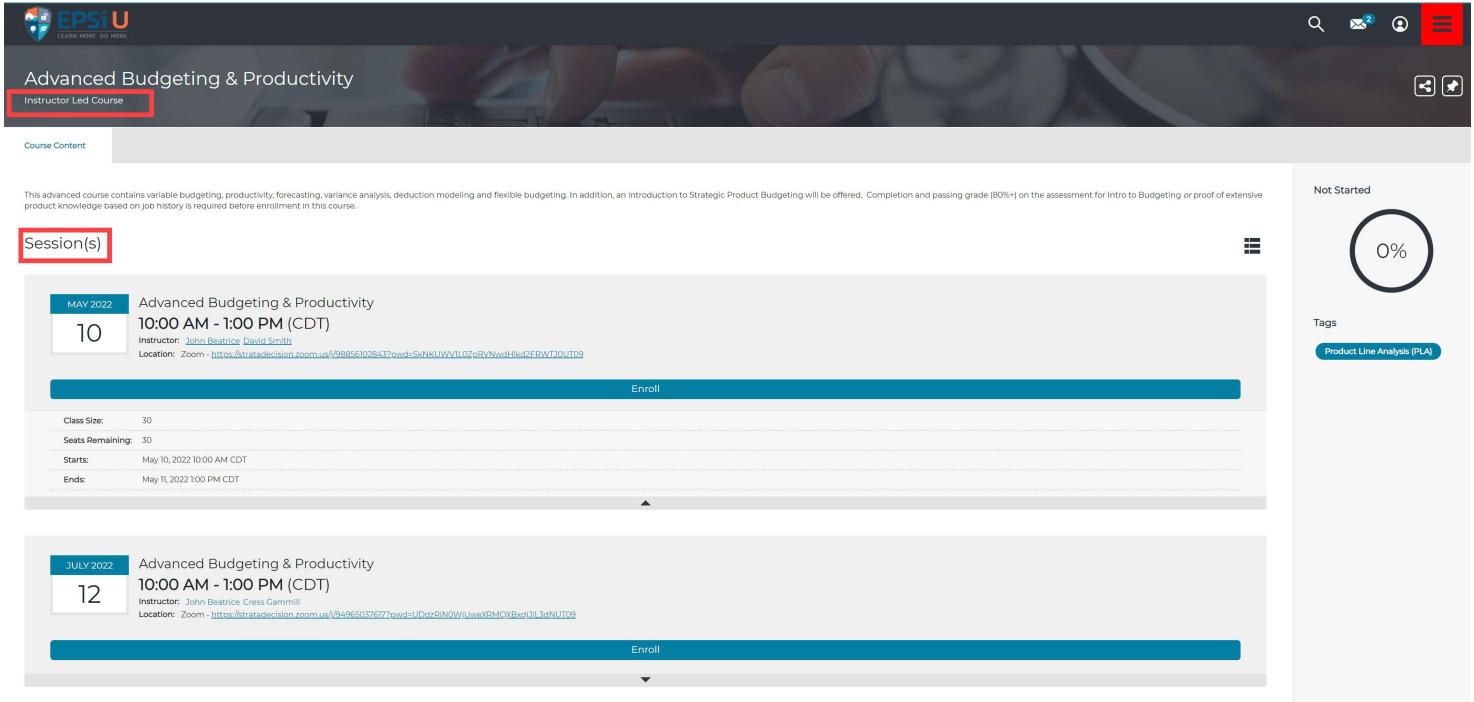


7. After you 'Enroll' in the course, the blue button will change to **Choose Session**. Click the blue button named **Choose Session**.

NOTE: If you do not 'Choose Session' your registration will not be complete and you will not have received a class confirmation email that contains the calendar invite and Zoom information.



- Next, the name of the 'Instructor Led Course' that you selected previously will pop up with several course **session(s)** choices.



The screenshot shows the Strata course page for 'Advanced Budgeting & Productivity'. The page is divided into a header, a main content area, and a right sidebar. The header includes the EPSiU logo and navigation icons. The main content area has a 'Course Content' section with a 'Session(s)' link highlighted. Below this, there are two course sessions listed for May 2022 and July 2022. Each session has a date, time, instructor, and location. A long blue 'Enroll' button is present for each session. The right sidebar shows a 'Not Started' status with a 0% progress indicator and a 'Product Line Analysis (PLA)' tag.

Course Content

Session(s)

MAY 2022 Advanced Budgeting & Productivity
10 10:00 AM - 1:00 PM (CDT)
 Instructor: John Beatrice David Smith
 Location: Zoom - <https://stratadecision.zoom.us/j/28856107845?pwd=SkNkUWVlOTc0bWVxallldjZFRVFTQ0U0R0>
 Enroll

Class Size: 30
 Seats Remaining: 30
 Starts: May 10, 2022 10:00 AM CDT
 Ends: May 11, 2022 1:00 PM CDT

JULY 2022 Advanced Budgeting & Productivity
12 10:00 AM - 1:00 PM (CDT)
 Instructor: John Beatrice Cress Gamhill
 Location: Zoom - <https://stratadecision.zoom.us/j/24965037077?pwd=UDcxRlN0WUJlbnRBM0xRbWJlL3pNUT09>
 Enroll

Not Started
 0%

Tags
 Product Line Analysis (PLA)

- Choose the course 'session' by selecting the long blue button in the middle of your screen named **Enroll**.

This advanced course contains variable budgeting, productivity, forecasting, variance analysis, deduction modeling and flexible budgeting. In addition, an introduction to Strategic Product Budgeting will be offered. Completion and passing grade (80%+) on the assessment for Intro to Budgeting or proof of extensive product knowledge based on job history is required before enrollment in this course.

Session(s)

MAY 2022
10

Advanced Budgeting & Productivity
10:00 AM - 1:00 PM (CDT)
Instructor: [John Beatrice](#) [David Smith](#)
Location: Zoom - <https://stratadecision.zoom.us/j/988563028637?pwd=SkNkUWVlOZqRVNwdHhkdFpWTjZOUU09>

Enroll

Class Size: 30
Seats Remaining: 30
Starts: May 10, 2022 10:00 AM CDT
Ends: May 11, 2022 1:00 PM CDT

JULY 2022
12

Advanced Budgeting & Productivity
10:00 AM - 1:00 PM (CDT)
Instructor: [John Beatrice](#) [Cress Gammill](#)
Location: Zoom - <https://stratadecision.zoom.us/j/9a0650376377?pwd=UjBwRmNlOWUjLWpXMDVhYXUjLTU3dHNUIT09>

Enroll

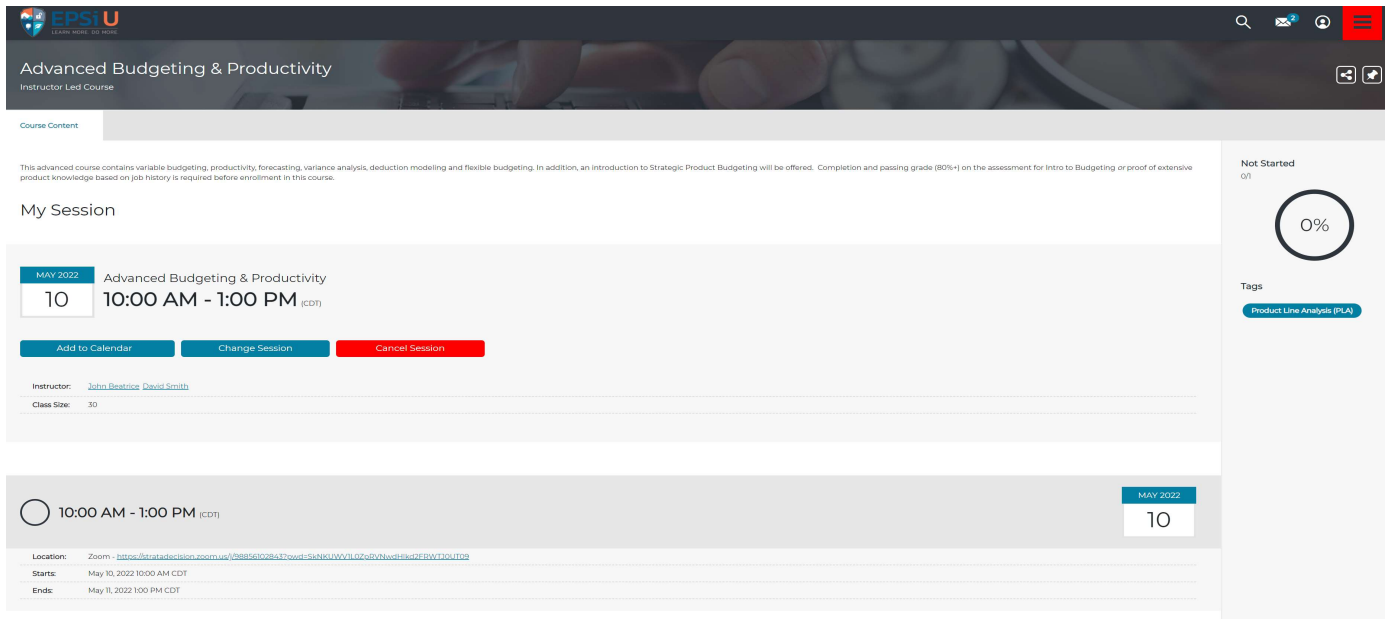
Not Started

0%

Tags

Product Line Analysis (PLA)


10. The system may “spin/think” for a few seconds, then a new screen named **‘My Session’** will appear. The system will automatically send you an email confirmation, calendar invite and Zoom invitation. If you do not receive this information via email this mean that you have not yet chosen a session. Please go back to step #9 and chose the appropriate session.



The screenshot displays the 'My Session' interface. At the top, the EPSTU logo and course title 'Advanced Budgeting & Productivity' are visible. Below this, a 'Course Content' section provides a brief description of the course. The main 'My Session' area shows the date 'MAY 2022' and '10' for the session date, with the time '10:00 AM - 1:00 PM (CDT)'. Three buttons are present: 'Add to Calendar' (blue), 'Change Session' (blue), and 'Cancel Session' (red). Below these, the instructor names 'John Beal' and 'David Smith' are listed, along with a class size of 30. A Zoom link is provided for the session. On the right side, a 'Not Started' status indicator shows '0%' completion, and a tag for 'Product Line Analysis (PLA)' is visible.





11. The **My Session** window displays the following information:

- a. Three buttons to:
 - i. **‘Add to Calendar’**
 1. **CLICK THIS BLUE BUTTON** to add the training session to your calendar system, i.e., Outlook
 - ii. **‘Change Session’**
 1. This blue button can be used to switch to another training date session if available
 - iii. **‘Cancel Session’**
 1. This red button can be used if you made a mistake or can no longer attend the training session
- b. Instructor name(s)
- c. Class size
- d. **Zoom link information**
 - i. The same Zoom link will be used for the entire session, for both Tuesday & Wednesday classes



Advanced Budgeting & Productivity

Instructor Led Course

Course Content

This advanced course contains variable budgeting, productivity, forecasting, variance analysis, deduction modeling and flexible budgeting. In addition, an Introduction to Strategic Product Budgeting will be offered. Completion and passing grade (80%+) on the assessment for Intro to Budgeting or proof of extensive product knowledge based on job history is required before enrollment in this course.

My Session

MAY 2022

10

Advanced Budgeting & Productivity

10:00 AM - 1:00 PM (CDT)

Add to Calendar

Change Session

Cancel Session

Instructor: [John Beatrice](#) [David Smith](#)

Class Size: 30

10:00 AM - 1:00 PM (CDT)

MAY 2022

10

Location: Zoom - <https://stratadecision.zoom.us/j/98856102843?pwd=SkhKdWVlO2o2bVNmNndHdkZlF5WTJOUlU9>

Starts: May 10, 2022 10:00 AM CDT

Ends: May 11, 2022 1:00 PM CDT

Not Started

0%

Tags

Product Line Analysis (PLA)

e. Class start and end date and time

- i. **NOTE:** Due to system limitations it “appears” that the session begins at 10 am and continues through the next day at 1:00 pm for *27 hours*. *This is incorrect.*
 1. In fact, **each session runs over the course of 2 days** for a **TOTAL duration of 6 hours or 3 hours per day.**
 2. Each Tuesday and each Wednesday, class **begins at 10 am** and each day **ends at 1 pm**
 3. The **same Zoom link will be used for the entire session**, for both days.
- ii. **NOTE:** The system is defaulted to **CENTRAL TIME ZONE**, but when you ‘Add to Calendar’ the time will then be *adjusted* to your calendar’s personal time zone.

12. Finally, an email will automatically be generated and forwarded to your email address that was established in your EPSi U profile. This email will also contain a link to **'Add to Calendar'** or an **.ics attachment**

Fwd: Advanced Budgeting & Productivity



Allison Jeter <stlwilson@sbcglobal.net>
To: Allison Jeter



From: Strata Training <noreplytraining@stratadecision.com>
Date: January 7, 2022 at 4:07:57 PM CST
To: STLWILSON@sbcglobal.net
Subject: Advanced Budgeting & Productivity

Hello epsi test - client,

You've enrolled in the **Advanced Budgeting & Productivity** session for the **Advanced Budgeting & Productivity** course.

- Instructor(s): **David Smith, John Beatrice**
- Start Date/Time: **05/10/2022 at 10:00:00 AM**
- Location: **Zoom** <https://stratadecision.zoom.us/j/98856102843?pwd=SkNKUWV1LOZpRVNwdHlkZ2FRWTJ0UT09>

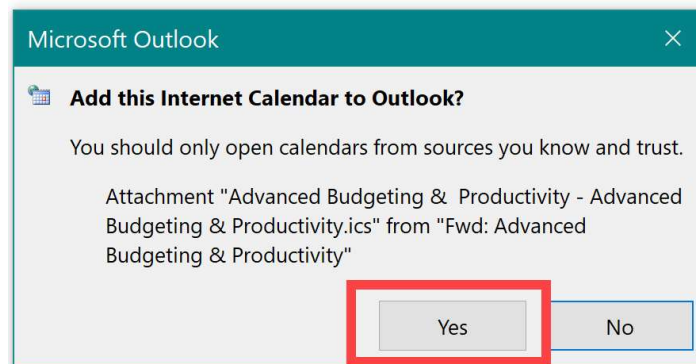
You should automatically receive the calendar invite for this class. Reach out to epsiu.help@stratadecision.com if you did not receive the invite or have any other questions about this course.

Happy training!

EPSi University Team @ Strata

Note: This is a system generated email. Please do not reply to this email.

- a. If you receive an **.ics Attachment**, you must click on it and open it, a pop up will appear asking if you would like to add this Internet Calendar to Outlook or whatever calendar program your organization uses. **Click yes** to add it to your



calendar

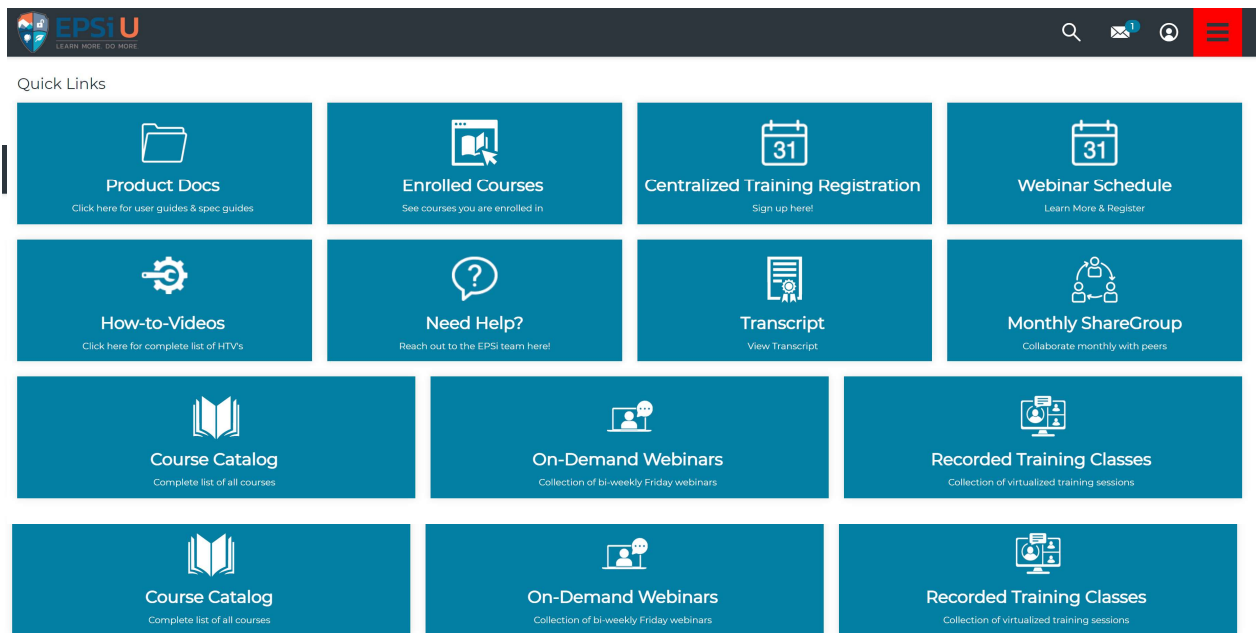
- b. Note: If you do not receive a confirmation email. Please go back to Step #9 and chose a session.

13. Closer to the class date, you will be able to download the class materials from within the details of the enrolled course (see page 8 for instructions)

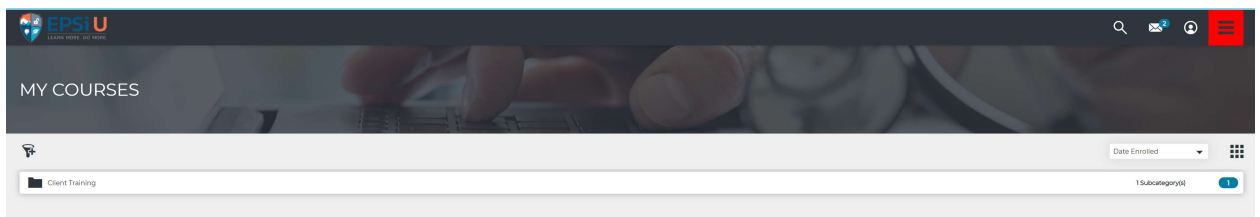
14. If you encounter any issues, email epsiu.help@stratadecision.com
15. Lastly, once you've completed the class, you'll automatically be enrolled in a curriculum which includes the assessment, which you then have two months to finish.

Enrolled Courses

16. In addition to the email sent in #12, you may also refer back to the **main dashboard** of EPSi U to the Quick Link tile named **Enrolled Courses**.

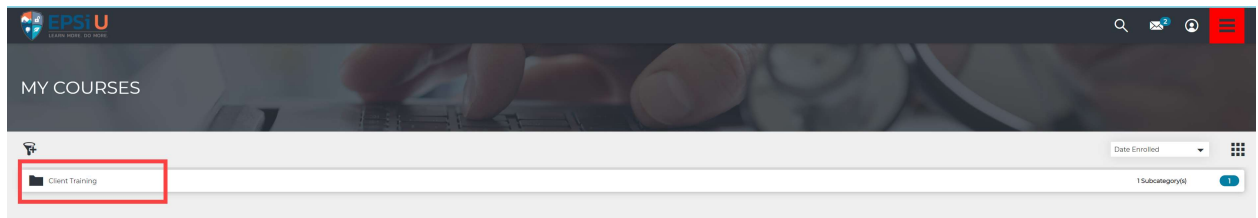


17. Click the tile **Enrolled Courses**.

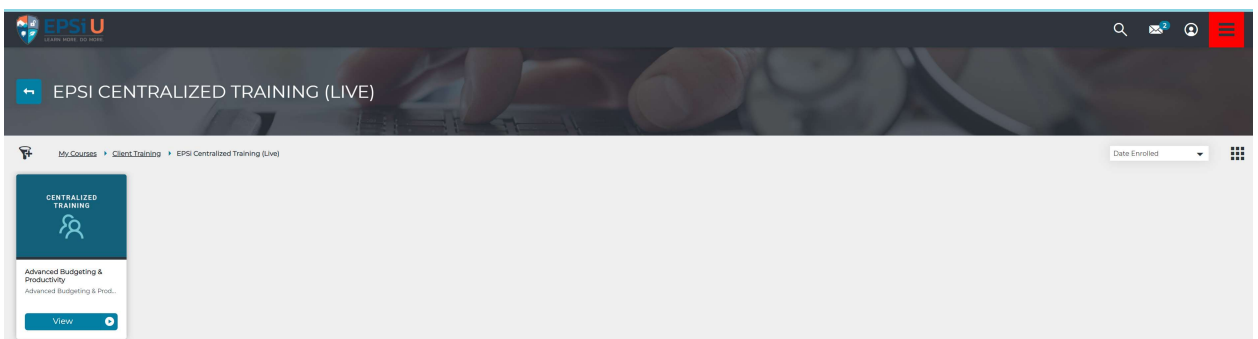
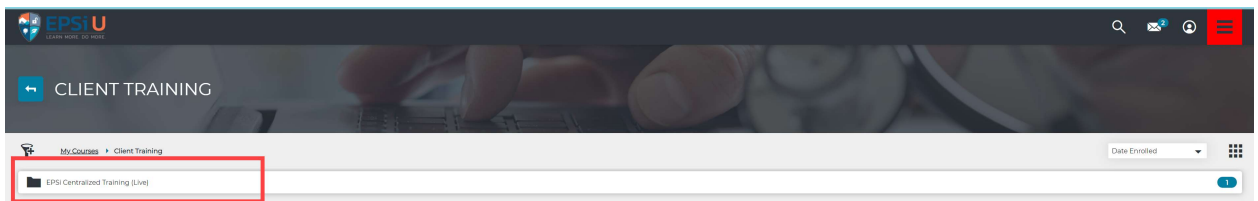


18. The **My Courses** page will appear listing folders of all of the courses that you are currently enrolled in.

19. Click the folder named **Client Training**

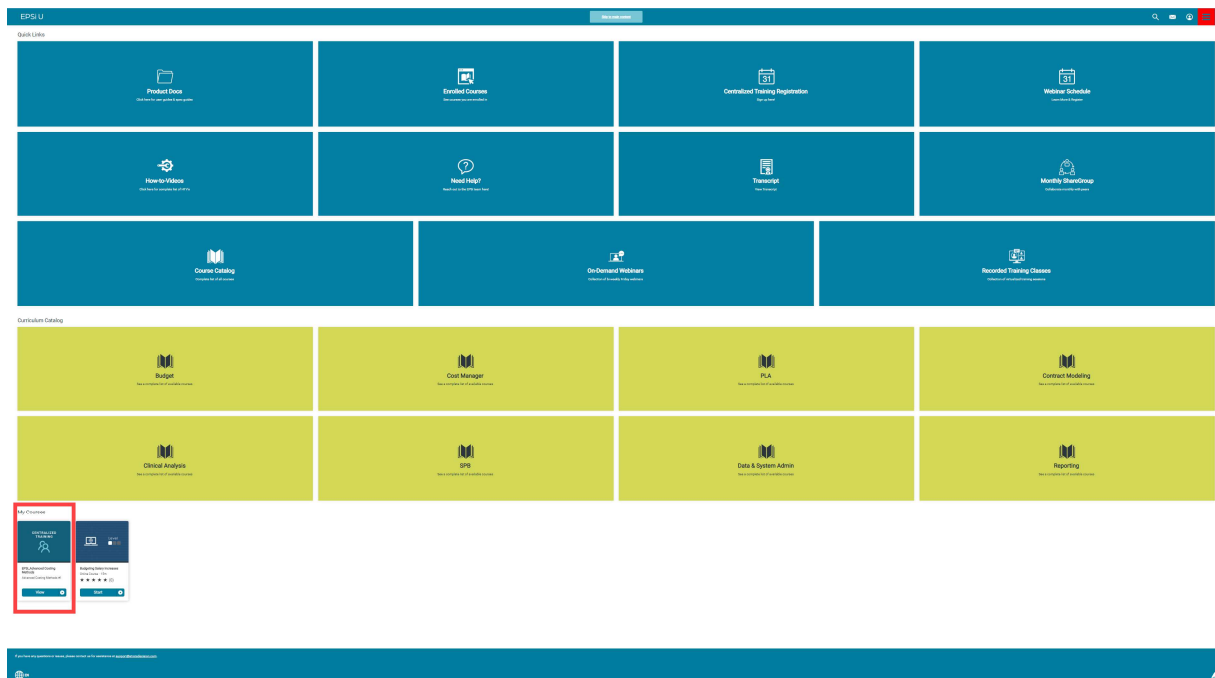


20. Next, click the folder Client Training will open a subfolder named **EPSi Centralized Training (Live)**

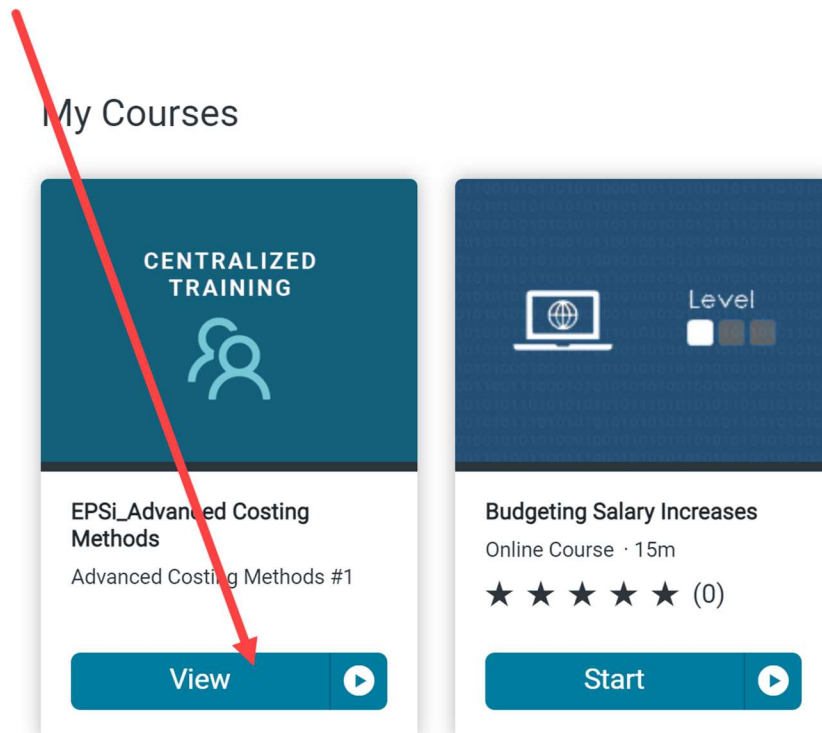


21. All of the EPSi Centralized Trainings that you are enrolled in will be displayed. If you click the blue **View** button for each separate class, the **My Session** window displays the details of the session described in line i #11 above. Please click onto the blue button to access the class details which includes add to calendar, change or cancel the session, and to obtain training documentation.

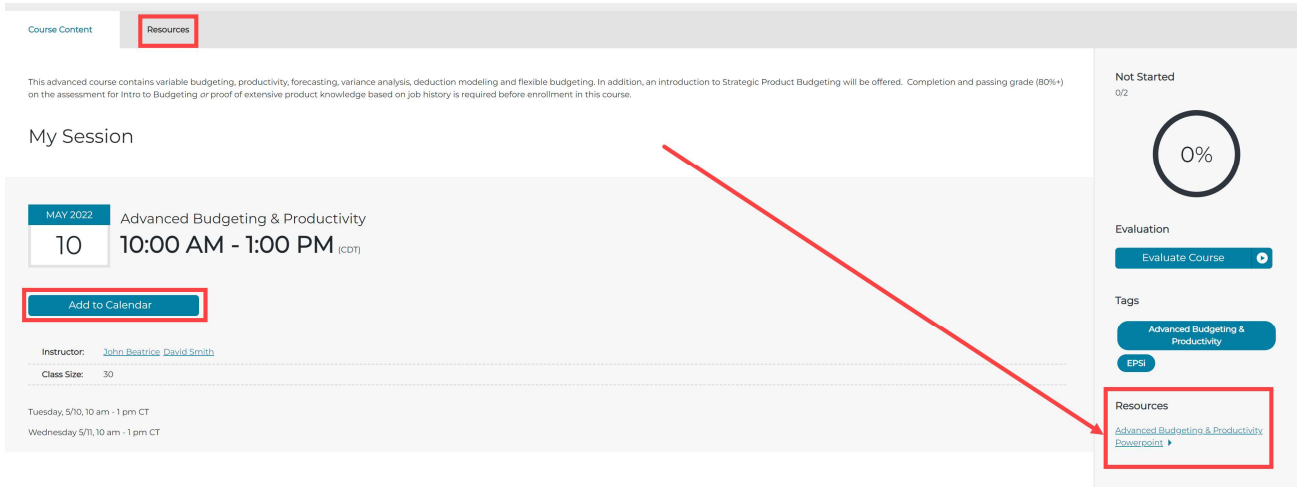
Alternatively, you can also view the active courses to which you are enrolled from the main EPSi U Dashboard under the 'My Courses' ribbon.



Please click on the blue 'view' button on one of the courses listed under 'My Courses' to obtain session details.



Session details include Add to Calendar, Change or Cancel the session, Course Evaluation, and to obtain training 'Resources' such as PowerPoints and other related documentation.



The screenshot shows the 'Resources' tab selected in the top navigation bar. The main content area displays session details for 'Advanced Budgeting & Productivity' on May 10, 2022, from 10:00 AM to 1:00 PM. A red box highlights the 'Add to Calendar' button. To the right, a sidebar shows the course progress as 'Not Started' (0/2) with a 0% completion circle. Below this, there is an 'Evaluate Course' button and tags for 'Advanced Budgeting & Productivity' and 'EPSi'. At the bottom of the sidebar, a red box highlights the 'Resources' section, which contains a link to 'Advanced Budgeting & Productivity Powerpoint'. A red arrow points from the 'Add to Calendar' button to the 'Resources' link.

Once you click on the link for the resources, a new browser tab will open to give you the ability to download the PDF or print a physical copy for notes.

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