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 <u>training.stratadecision.com</u> 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 <u>FORM</u>

Access EPSi University

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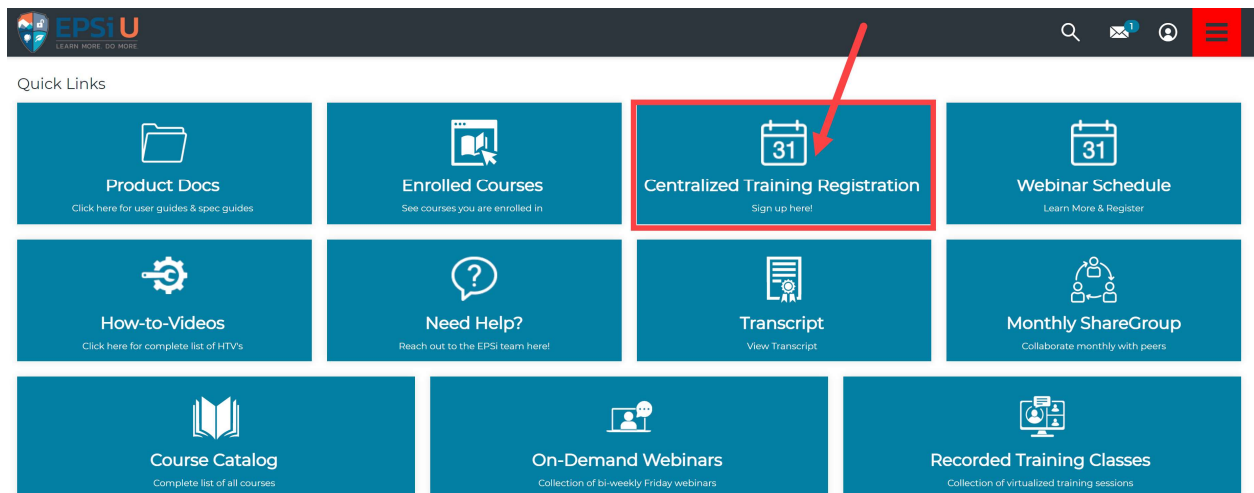

Centralized Training Registration

4. The **EPSi Centralized Training (Live)** page will open.

5. **TIP:** From the EPSI Centralized Training page, <u>click</u> the **'Rubik's Cube'** button in the right-hand corner and <u>set</u> the view to **list view** (if it's not already set) so you can more easily view the dates for each class and session.
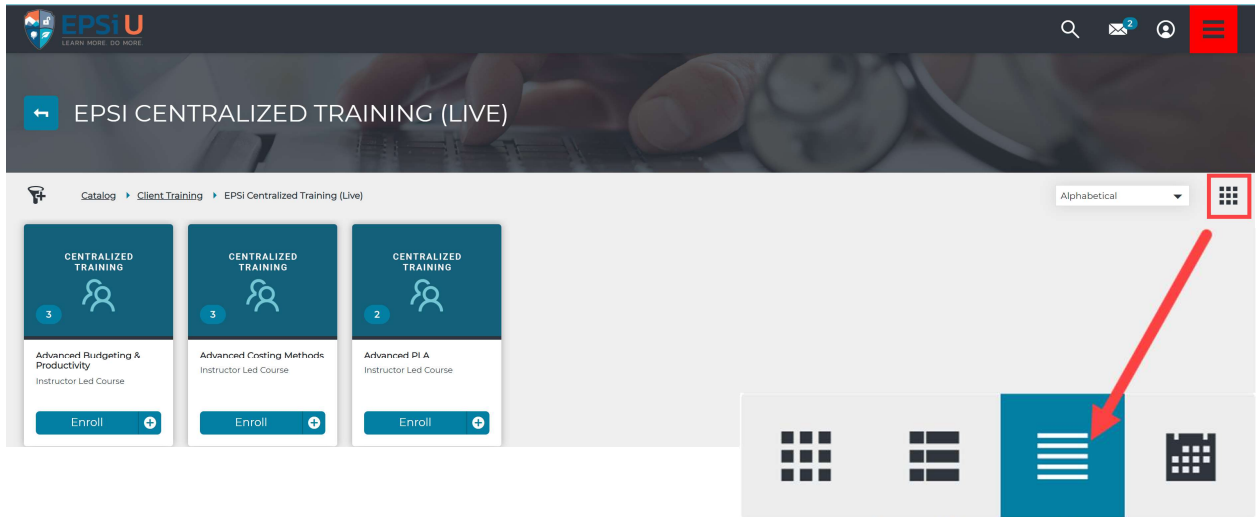
6. Select the course you'd like to sign up for by clicking the corresponding blue **Enroll** button to the right of the course name.
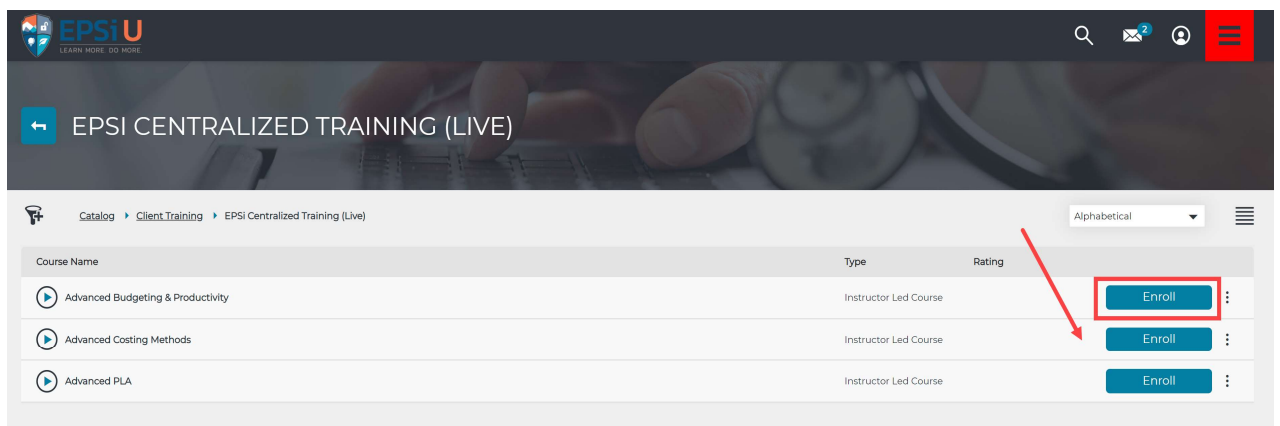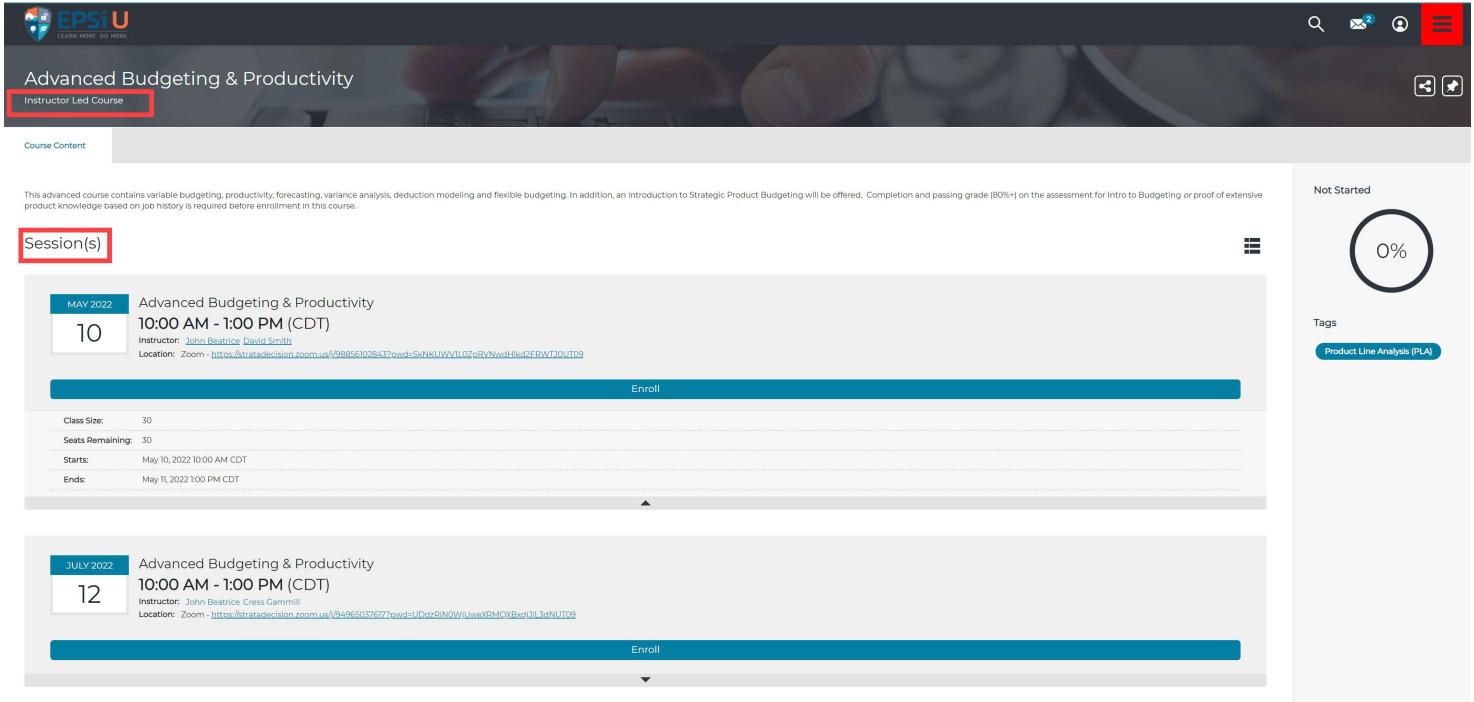

7. After you 'Enroll' in the course, the blue button will change to **Choose Session**. Click the blue button named **Choose Session**.

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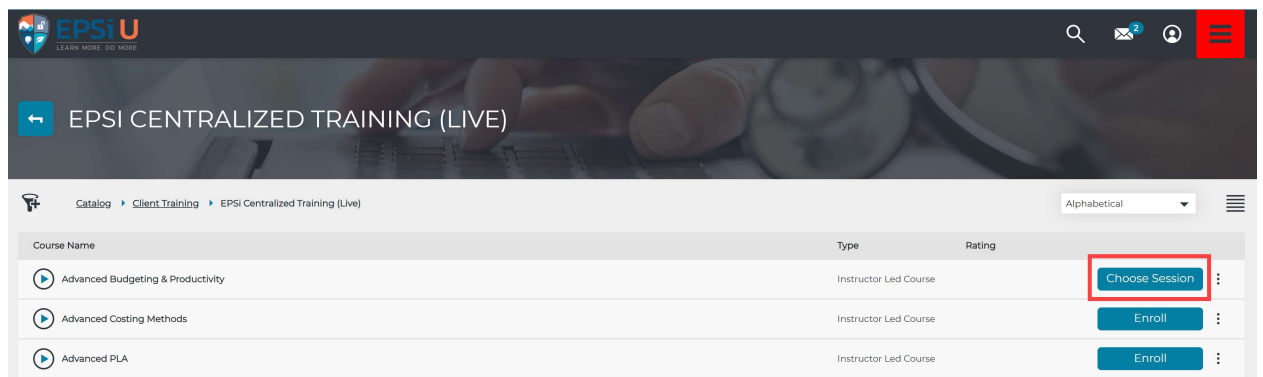
8. Next, the name of the 'Instructor Led Course' that you selected previously will pop up with several course **session(s)** choices.

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

EPSi U
LEARN MORE. DO MORE.

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.

Not Started

0%

Tags

Product Line Analysis (PLA)

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/98856102843?pwd=SkNKUWV1L0ZpRVNwdHlkd2FRWTJ0UT09

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/94965037617?pwd=UDdzRlN0WjUweXRMQXBxdjJiL3dNUT09

Enroll

▼

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.

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

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 <u>automatically be generated</u> 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

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

Advanced Budgeting & Productivity - Advanced Budgeting & Productivity.ics
3 KB

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=SkNKUWV1L0ZpRVNwdHlkd2FRWTJ0UT09

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. C<u>lick yes</u> to add it to your
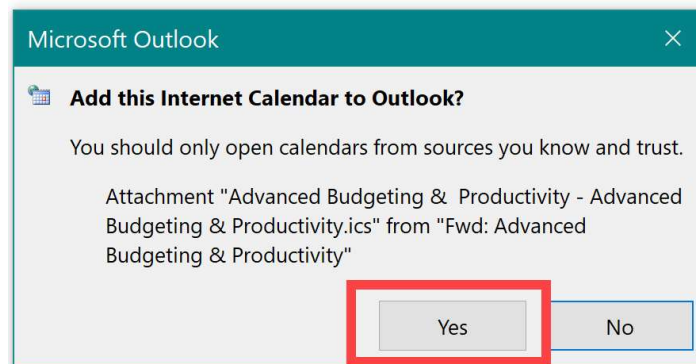
calendar

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**.
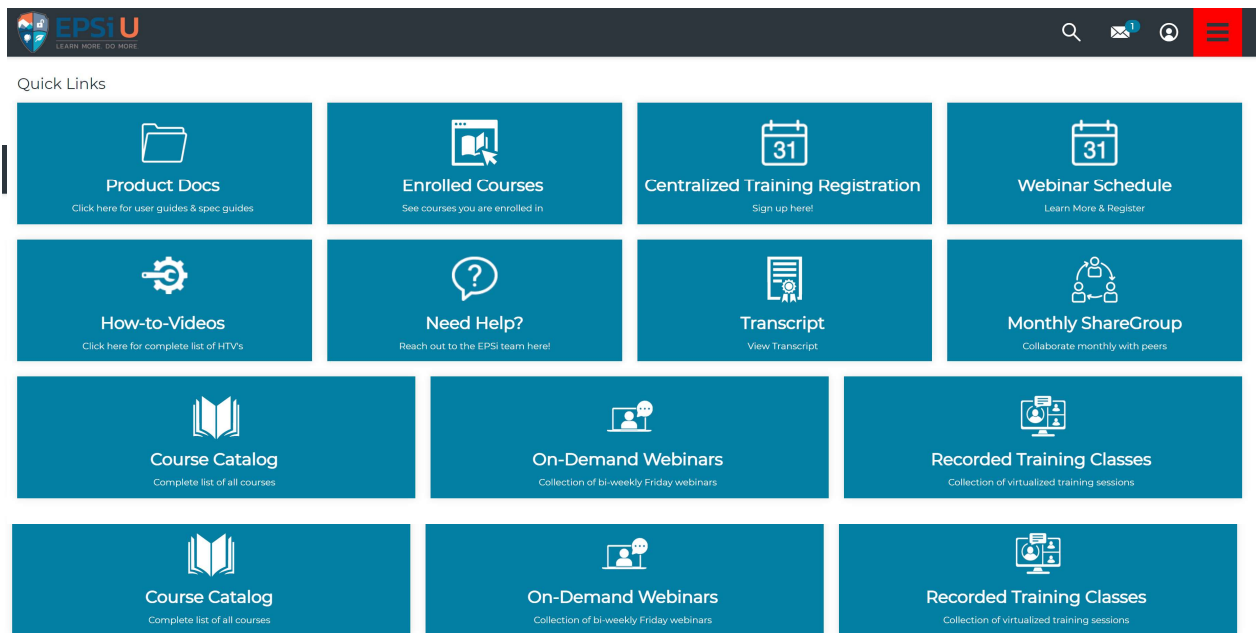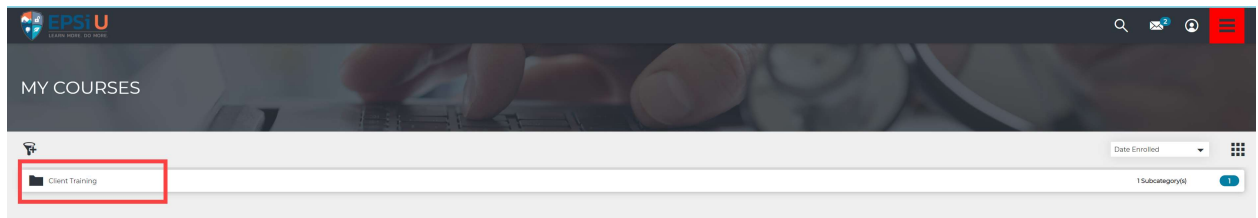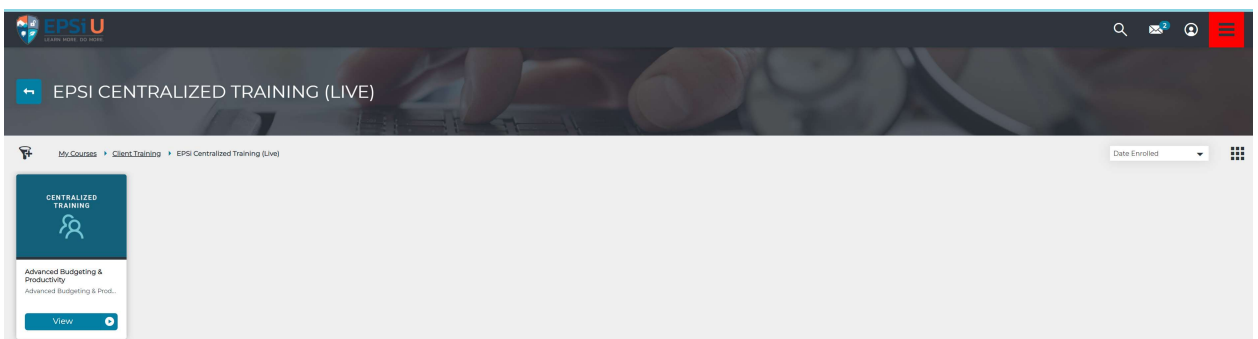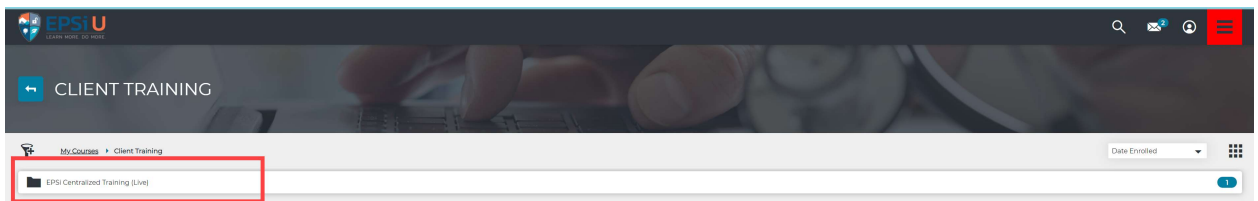

17. Click the tile **Enrolled Courses**.
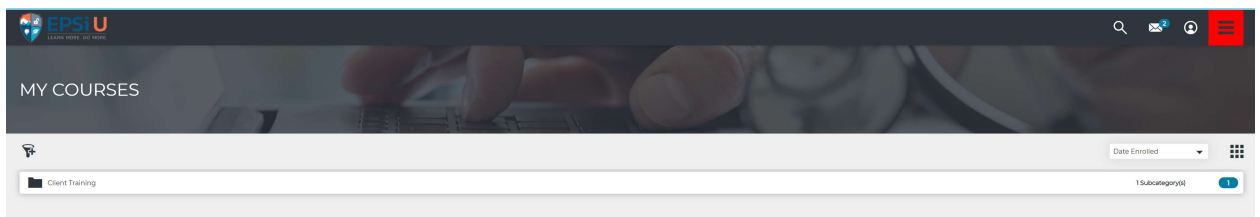
18. The **My Courses** page will appear listing folders of all of the courses that you are currently enrolled in.

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.
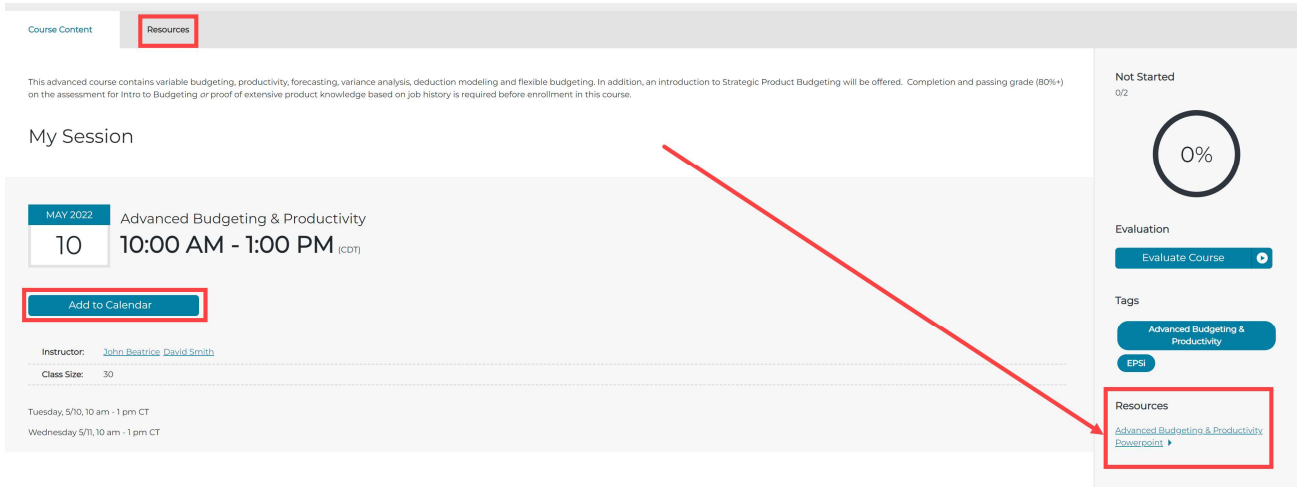
Alternatively, you can also view the active courses to which you are enrolled from the main EPSi U Dashboard under the 'My Courses' ribbon.
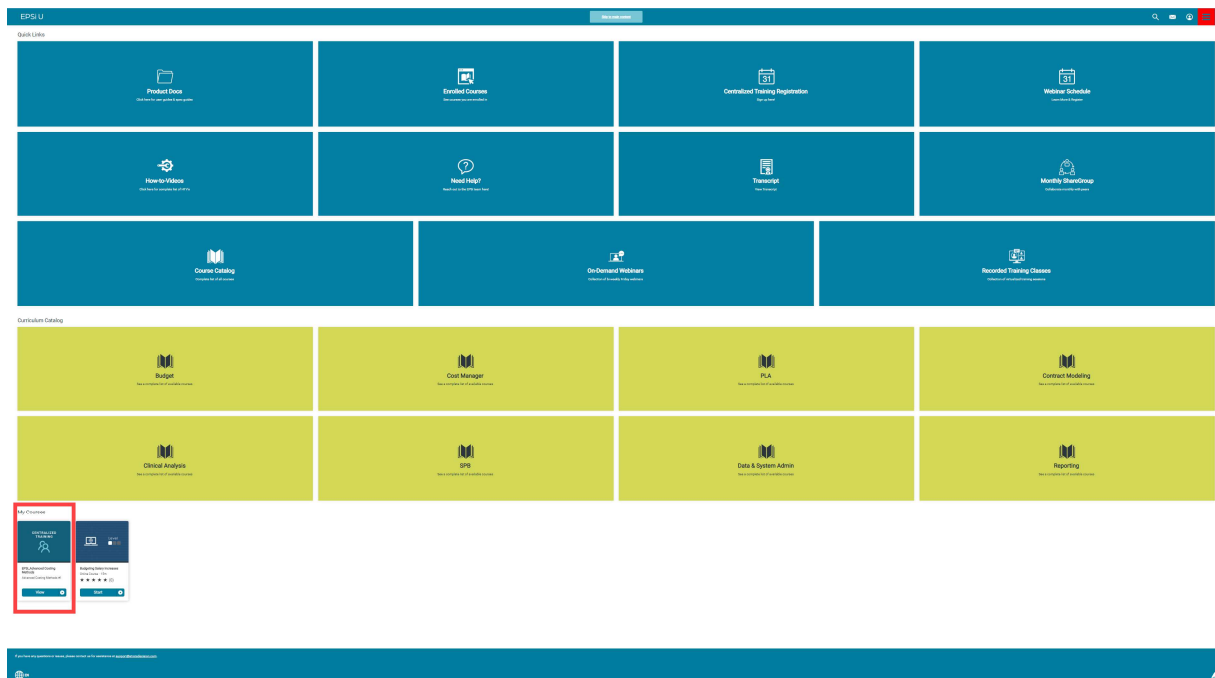
Please click on the blue 'view' button on one of the courses listed under 'My Courses' to obtain session details.
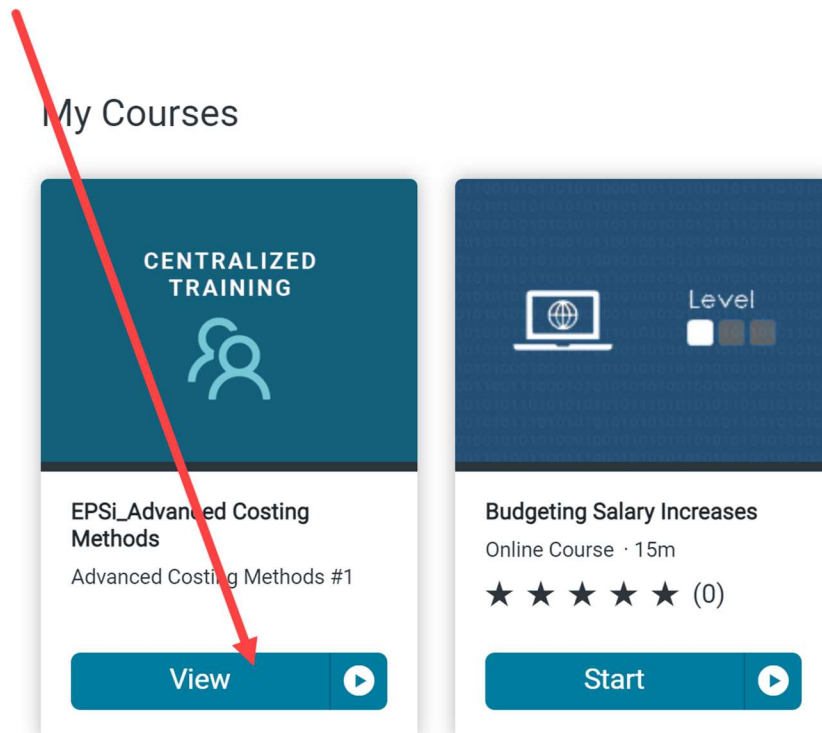
Session details include Add to Calendar, Change or Cancel the session, Course Evaluation, and to obtain training 'Resources' such as PowerPoints and other related documentation.

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