

# **EPSi Training Sign Up - GUIDE**

EFFECTIVE JANUARY 1, 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, <u>click</u> on the Quick Link tile named Centralized Training Registration





## **Centralized Training Registration**

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



 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 <u>clicking</u> the corresponding blue **Enroll** button to the right of the course name.

		Q 💌 <sup>2</sup> 🕑 📃
EPSI CENTRALIZED TRAINING (LIVE)		
Catalog > <u>Client Training</u> > EPSi Centralized Training (Live)	X	Alphabetical 👻
Course Name	Type Rating	
Advanced Budgeting & Product/vity	Instructor Led Course	Enroll
Advanced Costing Methods	Instructor Led Course	Enroll
Advanced PLA	Instructor Led Course	Enroll

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

	۹	×2	٢	≡
EPSI CENTRALIZED TRAINING (LIVE)				
Catalog > Client Training > EPSI Centralized Training (Live)	Alphabe	rtical	•	≣
Course Name Type Rating	_			
Advanced Budgeting & Productivity	1	Choose	Session	:
Advanced Costing Methods Instructor Led Course	1	Eni	roll	:
Advanced PLA Instructor Led Course		Eni	roll	:



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

		ୟ ⊠² 🕑 📃
Advanced B Instructor Led Course Course Content	audgeting & Productivity	<
This advanced course conta product knowledge based o Session(s)	ins 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 in porticatory is required before enrollment in this course.	Not Started
MAY 2022 10	Advanced Budgeting & Productivity 10:00 AM - 1:00 PM (CDT) Instructor: Joins Bastics: David Smith Leastor: Zoon - Intro Stratadecision zoomua/98860026317exet-SNRUWYL07eRVHwdHest2FEWT20UT02	Tags Product Line Analysis (PLA)
	Enroll	
Class Size:	30	
Seats Remaining:	30	
Starts:	May 10, 2022 10:00 AM CDT	
Ends:	May 11, 2022 100 PM CDT	
	▲	
JULY 2022	Advanced Budgeting & Productivity 10:00 AM - 1:00 PM (CDT) Instructor: John Beatrice Creas Cammil Leasting: Zoon - <u>http://kitadackinn.wormus/Beads0178177.evd/s1/DadBN/00/jl/ww0RM00Bis/11.54NUT09</u> Enroll	
	Ettor	
	•	

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

		Q 🛯 🔹
Advanced B Instructor Led Course	Budgeting & Productivity	€ ₹
This advanced course conta product knowledge based o Session(s)	ains variable budgeting, productivity, forecasting, variance analysis, deduction modeling and fielible 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 on job history is required before enrolment in this course.	Not Started
MAY 2022 10	Advanced Budgeting & Productivity 10:00 AM - 1:00 PM (CDT) Instructor: John Bastrice David Smith Leadfor: Zoon - http://diasis.ion.com/uk/BBSSI028437cadeSsNRUW/ICZeBN/wadHist2259VT10UT08	Tags Product Line Analysis (PLA)
Class Sizer	Enroll *	
Seats Remaining:	50 50	
Starts:	May 10. 2022 10:00 AM CDT	
Ends	May 11, 2022 1:00 PM CDT	
лику 2022 12	Advanced Budgeting & Productivity 10:00 AM -1:00 PM (CDT) Instructor: John Bastrice Cruss Cammil Leastor: Zoon - <u>Estructoristadedistion zoon us/Nede6001677-oud-UD-scRA009(Jues/Red/Lide)UT00</u> Enroll	



10. The system may "spin/think" for a few seconds, then a new screen named 'My Session' will appear.

	ର 💌 🗈 📃
Advanced Budgeting & Productivity	
Course Contant	
This advanced course contains variable budgeting, productivity, forecasting, variance analysis, deduction modeling and fieldble 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 involved based on job history is required before enrolment in this course.	Not Started
My Session	( 0% )
MAY 2022       Advanced Budgeting & Productivity         10       10:00 AM - 1:00 PM (con)	Tags Product Line Analysis (PLA)
Add to Calendar Change Session Cancel Session	
Nativities         Juin Bearing David Smith           Case Stree         30	
0 10:00 AM - 1:00 PM (KDT) 100 10	
Location         Xoon - <u>https://titaldockion.com.up/6885600.941Poud-5xHkUW/0102-0Wtud-Had7FW/T0UT09</u> Starts:         May 10 20221000 AM CDT	
Ends May 11, 2022 100 PM CDT	

- 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.* 
      - In fact, each session runs over the course of 2 days for a <u>TOTAL duration of 6</u> hours or 3 hours per day.
      - 2. Each Tuesday and each Wednesday, class <u>begins</u> at 10 am and each day <u>ends</u> 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.

	ର 🕿 🛛 📃
Advanced Budgeting & Productivity	<
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
My Session	0%
Advanced Budgeting & Productivity 10 Advanced Budgeting & Productivity 10 Advanced Budgeting & Productivity 10 Concel Session Cancel Sessi	Tags Product Line Analysis (PLA)
МАУ 2022 10:00 АМ - 1:00 РМ (сол)	
Location         Zoom - <u>https://kitatalestiikus.zoomus/MBRSB028437.pwgt=SkN02N.02zRVAkadHikubFRWTD0/T02</u> Starts:         May 10.2022 100.0 Ak CDT           Ends:         May 11, 2022 100 PM CDT	

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

AJIIison Jeter <stlwilson@sbcglobal.net> To Allison Jeter</stlwilson@sbcglobal.net>	
Advanced Budgeting & Productivity - Advanced Budgeting & Productivity.ics 3 KB	
and a second	
From: Strata Training < <u>noreplytraining@stratadecision.com</u> > 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 <a href="https://stratadecision.zoom.us/j/98856102843?pwd=SkNKUWV1L0ZpRVNwdHlkd2FRWTJ0UT09">https://stratadecision.zoom.us/j/98856102843?pwd=SkNKUWV1L0ZpRVNwdHlkd2FRWTJ0UT09</a>

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



- 13. Closer to the class date, your instructor will email you the class materials.
- 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.

	ର 😒	٢	
MY COURSES			
<i>A</i>	Date Enrolled	÷	
Ciert Training	1 Subcateg	ory(s)	•



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

	Q	∞² (		
MY COURSES				
F	Date Enrol	led	•	
Client Training	1Su	ocategory(s)	•	

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

	Q 🛛	8		
CLIENT TRAINING				
Ms:Course > Client Training	Date Enrollec	•	- 1	#
EPSI Centralized Training (Lve)				

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.

