AGENDA
Monday, October 10 – Training Day

LIFT 22 the strata users summit

	StrataJazz				EPSi	
	Analytics	**Decision Support**	**Advanced Planning**		**Advanced Costing Methods**	**Advanced Budgeting & Productivity**
	Track 1	Track 2	Track 3	Track 4	Track 5	Track 6
Intended For	*New/Live Clients*	*New Clients*	*New Clients*	*New Clients*	*Live Clients*	*Live Clients*
8:00 – 8:45am	Breakfast					
9:00 – 9:30am	Welcome Session					
10:00am – 12:00pm	Advanced Analytics – Data Visualization	Costing Level 1	MR Certification	OnePlan Certification	Advanced Costing	Advanced Budgeting
12:00 – 1:00pm	Lunch					
1:00 – 5:00pm	Advanced Analytics – Data Visualization Continued	Costing Level 1 Continued	MR Certification Continued	OnePlan Certification Continued	Advanced Costing Continued	Advanced Budgeting Continued
Certification	Yes	Yes	Yes	Yes	No	No
CPE	Yes	Yes	Yes	Yes	Yes	Yes

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Advanced Analytics – Data Visualizations (6 CPE Credits)

Understand the fundamentals needed to be an effective and independent administrator of your organization's Advanced Analytics Dashboards. Following successful certification in this course, the expectation is that you can handle essential build, maintenance and troubleshooting tasks related to Advanced Analytics.

Learning Objectives

- Analyze the data and information needed for your reporting needs
- Understand basic widgets, filters and data marts for your reporting needs

Costing Level 1 (6 CPE Credits)

Understand what Cost Accounting is and the basic processes and configuration steps needed to be an effective and independent administrator of the Cost Accounting module of Decision Support. Following successful certification in this class, the expectation is that you are able to handle fundamental build, maintenance and troubleshooting tasks.

Learning Objectives

- Define cost accounting
- Configure dimensions for costing and configure, update and maintain a cost model

Management Reporting Certification (6 CPE Credits)

Determine all the tools and processes you need to maintain and roll over the Management Reporting module, in addition to confidently educating and supporting other users of the module in your organization.

Learning Objectives

- Navigate scorecards, entering commentary on metrics and updating role assignments in Security Center
- Configure and maintain dimensions and update and maintain settings in System Center

One Plan Budgeting Certification (6 CPE Credits)

Determine all the tools and processes you need to maintain and roll over the OnePlan® Budgeting module, in addition to confidently educating and supporting other users of the module in your organization.

Learning Objectives

- Complete a budget as a manager, better understanding the approval process for a budget, updating your budget settings at a system level and entity level, changing the departmental budget targets and finalizing your budget
- Run reports to aid the budget process

Advanced Costing Methods (6 CPE Credits)

Understand the utilization and rationale of various advanced costing methodologies and learn how to appropriately apply these methods within the EPSi Costing product to address your organization's business needs. Advanced methodologies include Variable Charge Costing (VCC) and Product Line Costing.

Learning Objectives

- Successfully utilize table assignments and table flags to make the monthly cost process less frustrating and time–consuming
- Employ Product Line & Variable Charge Costing methodologies within your organization, with step–by–step instructions and best practices

Advanced Budgeting (6 CPE Credits)

Learn about variable budgeting, productivity, forecasting, variance analysis, deduction modeling and flexible budgeting in this course, with an additional introduction to Strategic Product Budgeting.

Learning Objectives

- Develop a successful plan before establishing a budget
- Conduct the proper maintenance and set up of a Rolling Forecast, Variable Budget and Key Performance Indicators

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