

EFP End User 2 day course

Please review [Pre-requisites](#) prior to the training.

This is a high paced **2 day course**. The **purpose** of the training is to provide you with knowledge and skills to use **EFP**.

You need to bring your own laptop to this course - see [Pre-requisites](#).

The **outcome** of the 2 day course:

- You are aware of how Epicor Financial Planner (EFP) works and how data flows within the system.
- You know how to use EFP for Financial Reporting and Budgeting.
- You know how to configure a basic Financial budget process in the product.
- You have knowledge of possible advanced uses/ configurations of budget and reporting processes.
- You have knowledge of possible advanced uses/ configurations of Business Rules.

Agenda

Training Day 1

Focus: EFP Overview and Reporting

Time	Subject
09:00 – 10:30:	EFP System overview <ul style="list-style-type: none"> * What can EFP do for you? * What is it and how does it work? * Flow of data through the system
10:30 – 13:00:	Publishing a pre-built report <ul style="list-style-type: none"> * Relation between Filters and Report Slicer
13:00 – 13:45:	Lunch
13:45 – 16:30:	Building a report using report template <ul style="list-style-type: none"> * Review report that is to be built and elements required to built report * Adding Columns * Adding Rows * Data Member Defintions * Property Filter * Current override Members * Expand Options * Time Periords and Offsets * Drill Report * Report options settings

Training Day 2

Focus: Budget Configuration and Process

Time	Subject
09:00 – 10:30:	Budget Process Configuration <ul style="list-style-type: none">* Stakeholders & Driver segments* Budget and Forecast Cycles* Input Schedules
10:30 – 13:00:	Configuring the Budget Process, part 1 <ul style="list-style-type: none">* The Admin menu* Input Schedules
13:00 – 13:45:	Lunch
13:45 – 15:00:	Configuring the Budget Process, part 2 <ul style="list-style-type: none">* Data Manager* Testing
15:00 – 16:30:	Modeler <ul style="list-style-type: none">* Database locks* Dimensions* Security

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