4 Steps to EPM Training Success

*Please follow these steps before coming to EPM training. If done, EPM training can be a far richer experience.

STEP #1. EPM Access – Getting to the Main Menu

- Verify that you can properly access EPM and get to the EPM Main Menu.

STEP #2. Revenue & Expense Planning Input Template

- Verify that expected org’s & activities are appearing when using this template.
- Insert an activity and click “Display Data.” Did the data pull up as expected?
- Become familiar with the input columns (yellow cells) and template layout.

STEP #3. Required Reports

- Verify that proper org’s & activities are appearing when using the required reports.
- Insert an org or activity and “Display Data” within a report. Did the data pull up as expected?

STEP #4. Budget & Actual Reports

- Become familiar with the various reports available to assist you with your budgeting.

Instructions Above Visually Summarized

Come ready with any questions that may arise after following the above steps – Remember, you can refer to the EPM User Guide on the EPM website OBIA.UTAH.EDU/EPM in answering many EPM questions.