



EPM Add-In Bootcamp

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TruQua's EPM Add-in Boot-Camp will delve into the key components and features of the Excel EPM Add-in. Each participant will learn how to configure basic and advanced formatting, work with data manager packages, develop basic EPM extensions, perform trouble shooting, learn from real life implementation experiences and leverage a set of "best practices" to design and maintain high performing EPM Reports.

Each participant will be given a training environment in TruQua's SAP system to work through these labs. TruQua's EPM Add-in Bootcamp teaches from a problem-based approach leveraging real life like business cases. TruQua believes the best way to learn is for our attendees to get into the system to use the tools themselves and solve problems so they gain a deeper and more nuanced understanding, rather than simply listening to a lecture or follow a manual.

If the attendees are all from a single customer, TruQua can deliver a customer-specific environment for exercises prior (via backup and restore into the TruQua training system at least a week before the workshop) for an additional charge. This will allow attendees to work on an environment identical to their own for an extended period of time. The workshop will last for 3 days and can be conducted onsite or offsite. For onsite workshops, the client shall cover reasonable expenses.

TruQua EPM Add-In Bootcamp is available for all versions of the SAP BPC product including but not limited to the version for the Microsoft platform, version for SAP NetWeaver and on HANA (7.x and 10.x releases).



DAY 1		
Time	Topic	Type
8:30	Introduction / Breakfast	Presentation
9:30	Overview	Presentation
10:00	High Level Review (EPM Add-in)	Presentation
10:30	The connection concept	Presentation
11:00	Key Concepts	Presentation
11:30	EPM Ribbon / EPM Context / EPM Pane	Presentation
12:00	Basic Reporting	Presentation
12:30	Lunch	
1:30	Basic Reporting (Hands-on)	Lab
3:00	Navigation	Presentation
3:30	EPM Formulas	Presentation
4:00	EPM Member Formulas	Presentation
4:30	EPM Local Members	Presentation
5:00	Break	

DAY 2		
Time	Topic	Type
8:30	Active Member Recognition	Presentation
9:00	EPM Formulas / Active Member R	Lab
10:00	Data Reconciliation	Presentation
10:30	Data Reconciliation	Lab
11:30	EPM Planning Functions	Presentation
12:00	Drill-through	Presentation
12:30	Drill-through	Lab
1:00	Lunch	
2:00	Work Status	Presentation
2:30	Publishing	Presentation
3:00	Formatting - Dynamic Formatting	Presentation
3:30	Formatting	Lab
4:30	EPM Ribbon Extensions	Presentation
5:00	Break	

DAY 3		
Time	Topic	Type
8:30	EPM Extensions	Lab
10:00	Data Manager Packages	Presentation
10:30	Integrating VBA	Presentation
11:00	VBA and EPM	Lab
12:00	Troubleshooting	Presentation
12:30	Lunch	
1:30	Troubleshooting	Lab
3:00	Roll-out strategies and best practices	Presentation
3:30	EPM Unwired *Demo*	Presentation
4:00	Survey	
4:45	Break	Break

Day 1 - Detail

Attendees of this session will learn SAP EPM Add-in fundamentals and navigation elements as well as the underlying mechanics of the SAP BPC system, including:

- Understanding SAP EPM and BPC key concepts
- Learning the connection concept
- Using the EPM ribbon
- Leveraging the EPM pane
- Using the EPM context
- Building basic reports
- Using EPM formulas
- Learning about active member recognition
- Setting up local member formulas

Business scenarios and use cases will be provided to illustrate the technical concepts and topics, concluding with a hands-on lab exercise. The first lab exercise will consist of an end-to-end exercise where the participants will learn how to configure a new connection, understand and work with the various components that compose the EPM Add-in interface, learn the basic rules of report building and key features to get the most of your reports leveraging EPM functions.

Day 2 - Detail

Attendees of this session will learn advanced features of the EPM Add-in in addition to real life scenarios to reconcile data from different sources using EPM reports. The participants will explore advanced features like:

- Using active member recognition
- Working with EPM planning functions
- Using drill-through and drill-down
- Setting up and managing the work status
- Learning how to publish and distribute EPM templates
- Formatting EPM reports
- Learning about the customizations that the EPM add-in support

The session will include hands-on exercises to familiarize participants with the different advanced features that EPM provides.

Attendees of this session will learn how to customize the EPM ribbon, understand the key concepts and learn how to use data manager packages in addition to learn how to integrate VBA into EPM reports. Participants will also learn how to troubleshoot some of the most common issues that our customers face during implementation projects.

Delve into rollout strategies outlining best practices for implementation projects delivered by industry leading experts as well as the do's and don'ts when using the EPM Add-in.

Participants will explore advanced features like:

- Develop EPM ribbon extensions
- Use and set up data manager packages
- Integrate VBA inside of EPM reports
- Troubleshoot EPM issues
- Learn about leading practices to rollout the EPM Add-in to end users
- Learn the features and capabilities of SAP's mobility solution, EPM Unwired

The session will include hands-on exercises to familiarize participants with the different advanced features that EPM provides.



TruQua is built on the principle that customers deserve **right-sized solutions** through **true quality**. TruQua's name comes from the that principle - **True Quality**

Founded by **Scott Cairncross**, the former head of the SAP Enterprise Performance Management (EPM) Regional Implementation Group (RIG) for Americas and **David Dixon**, a former FI/CO Platinum Consultant at SAP

TruQua is an official **software & services partner** with software engineering expertise to integrate SAP with other solutions and bridge any SAP software gaps

Specialists in **software solutions, project implementations and deployment** strategies for:

- **SAP S/4HANA Finance**
- **SAP Central Finance**
- **SAP Group Reporting**
- **SAP Analytics Cloud**
- **SAP BPC**
- **SAP HANA**
- **SAP BusinessObjects**
- **SAP BW & BW/4HANA**
- **SAP PaPM (FS-PER)**
- **SAP Cloud Platform**
- **SAP Leonardo**
- **Machine Learning**
- **BlackLine**
- **Magnitude Solutions**
- **Vertex Solutions**

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