

EPM Live Fusion Boot Camp Prerequisites

- Applicable to:** EPM Live 2013, Version 5.x
- Location:** EPM Live by Upland Office
2382 Faraday Avenue, Suite 200
Carlsbad, CA 92008
- Dates:** Monday, March 7 – Friday, March 11, 2016
Offered as Three Sessions (Attend one, some, or all):
Session 1 - End User: March 7 - 8
Session 2 - Reporting Deep Dive: March 9
Session 3 - Admin Essentials: March 10 - 11

Welcome to Boot Camp Registration!

The EPM Live Fusion Boot Camp is coming soon! We are very excited and looking forward to training with you in Carlsbad! To make sure you are all set and prepared when you get there – please review the items below!!

Note: Your hotel registration is NOT included in your Boot Camp registration. Hotel information is included on the Boot Camp registration site.

Hands-On Training Checklist

There will be lots of "hands-on" training during this Boot Camp - so if you'd like to participate (and we're sure you do!) then please review this checklist! Please be sure to bring the following with you to the Boot Camp:

- Very important – bring your **computer!!**
- Bring the **power cord** for your computer – and remember the appropriate international adapter, if applicable!
- An **external mouse** for easier and faster navigation on your computer.
- Have "**Admin Rights**" on your computer, should you need to update browser settings, etc.
- Web browsers:
 - Preferred: Internet Explorer (version 11 is preferred)
 - Firefox/Chrome (for Windows)
- Microsoft **Excel** 2010 or 2013 installed.
- **Silverlight** installed.
- **Microsoft Project** 2010 or 2013 installed. This is only needed if your organization has or plans to use Microsoft Project for schedule planning.
 - **EPM Live Project Publisher** (only if you have Microsoft Project installed) - Link to download instructions & zip file:



<http://upland.screenstepslive.com/s/EPMLive2013/m/UserGuide/l/147706-how-do-i-install-the-project-publisher-for-microsoft-project>

- Ability to **access your email** during Boot Camp (via the web, not via VPN/Citrix). This is not for doing your work email – this is because we have some features during training that will trigger notification emails and we want you to be able to see them.
- Bring your **business card** to share with new people you meet.

Knowledge Prerequisites (Session-Specific – see below)

Sessions 1: There are no prerequisites for Session 1. Just, come ready to learn & have fun!

Sessions 2 &/or 3: It is important to have strong End User knowledge of EPM Live. This may be via experience in EPM Live and/or previous training.

EPM Live 2013 End User Knowledge Prerequisites **

** These are applicable as prep for Sessions 2 & 3. If you attend Session 1 of the Fusion Boot Camp, you will meet the prerequisite requirements for Sessions 2 & 3.

You must complete the EPM Live End User training. We have the end user courses available into a recommended Learning Path in Upland University. Please be sure that you have completed the following courses from the Learning Path: **EPM Live 2013 Admins - Part 1**. Beyond just passing the exams, it is very important that you understand *how to use EPM Live*. This will greatly increase your success at the Boot Camp.

- Access to Upland University is required in order to complete the End User training. If you don't already have access, we will provide you with a 90-day complimentary enrollment. We will verify your enrollment access once Boot Camp registration is complete.
- Essential Courses (or corresponding use knowledge):
 - GS100 – Getting Started with EPM Live
 - EU150 – Navigating the EPM Live Site Collection
 - PM200 – Creating a Project Item and Building a Project Team
 - PM205 – Using the Online Planner to Create and Manage Projects
 - PM210 – Using Microsoft Project to Create and Manage Projects
 - KB211 – The KanBan Planner
 - PM213 – Creating and Managing Workspaces
 - PM214 - Managing Workspace Lists and Libraries
 - TM215 – Using Team Collaboration Tools for Productivity
 - TM220 – Using My Work for Managing and Statusing Work
 - TM225 – Using Timesheets for Capturing Time on Work and Non-Work Items
 - RM300 – Using Resource Management Tools within EPM Live
 - RP305 – Building and Managing Resource Plans Using the Project Resource Planning App



RP310 – Managing Resource Commitments Using the Project Resource Planning App

CP315 – Building and Managing Cost Plans Using the Project Cost Planning App

CP320 – Analyzing Cost Data Using the Project Cost Planning App

RP325 – Using Resource Negotiations within the Project Resource Planning App

OP350 – Using the Project Optimizer App

AG405 – Using the Agile Software Development App

RA500 – Working with Reports

- We will follow up with you directly to assess your status & progress for boot camp readiness prior to the Fusion Boot Camp.

SharePoint 2013 Knowledge Recommendations

As EPM Live is a tool built on the the SharePoint platform, SharePoint skills are beneficial. By having an understanding of the follows concepts & skills, you will be able to more quickly apply that understanding to EPM Live's Admin concepts & features.

- Here's a summary of some examples of the main SharePoint Admin skills recommended:
 - Using/Adding/Editing/Removing lists & libraries
 - Understanding of List Settings page
 - Navigating/Adding/Editing/Removing list & library views
 - Adding/Editing/Removing permissions & groups – understand the SharePoint security model & concepts
 - Understanding concepts of sites, pages, lists, libraries, hierarchy, navigation
 - Understanding of the SharePoint Admin functions (the options & links on the SharePoint Site Settings page)
- Here's a good example of some SharePoint training videos available online by Lynda.com: [click here](#).

Registration Questionnaire

We want to know our audience ahead of time! Please be prepared to provide the following information when you register:

- Are you an existing customer?
- What is your role with regards to the EPM Live solution and in your organization (SP Admin, EPM Live Admin, Project Manager, etc.)?
- Are you hosted as EPM Live Online/SaaS solution or do you host EPM Live on-premise?
- If you are hosted by EPM Live, please provide your Site Collection URL.
- What version of the EPM Live solution are you using now? If you're on-premise and unsure, you can verify the version of your solution files from within SharePoint Central Admin. If you're hosted online and unsure, let us know and we'll help you find this information.



What to Wear

As the agenda indicates, the days will be long – starting at 8:30 AM and going until 5:00 each day! As to what you should wear – it's really up to you! The instructor will be dressed in business casual attire – but you are welcome to dress more causal. And yes, you can even wear jeans if you want! You will be sitting a lot – so dress comfortably so you can roll up your sleeves and work hard!! Since the conference room will be air-conditioned and on the cooler side – we do suggest bringing a light jacket or sweater.

Meals

As part of your Boot Camp registration – your lunch will be provided every day! We will also have coffee, tea, water, and snacks available!! Yum!

If you are staying at the Marriott Residence Inn, your breakfast is also included. Dinner is NOT included. You can venture out to the surrounding area to enjoy some of the fine dining in the Carlsbad area! When you check-in at the hotel, ask them for a list of the restaurants within the area!

Questions?

Please join us **Friday, February 26, 2016 at 10:00 AM US Pacific** for our Boot Camp Prep web meeting. We will review any questions you have as you prepare for the Boot Camp. After you register for the Boot Camp, we'll email you the calendar invitation and GoToMeeting details.

EPM Live End User Training Questions: Attend one of the scheduled QA900 sessions ahead of time. The QA900 sessions are posted on Upland University. Go to the *Register for Courses* section and click on the *Citrix Trainings* tab. You may also post any questions in our Community Forum.

If you have any questions that were not answered above, please contact the training department at epmtraining@uplandsoftware.com. We look forward to seeing you in March for the Fusion Boot Camp!