

# How to Assign the End of Year Procedures Agenda

The content in this agenda will help you understand all of the end-of-year processes performed on Eagle.

1. From the **Assignments** tab click **New Assignment**.
2. Set the **Type** to Agenda and use “end of year” for the **Keyword** search.

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### Epicor Learning Center: Epicor Employees

Assignments

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- Employee Assignments
- New Assignment**
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#### New Assignment

Create an Assignment for any Employee or Group

Type: **Agenda** Keyword: **end of year**

Category: Accounting, Accounts Payable, Accounts Receivable, Advanced Receiving

Subcategory: Accounting Definitions, Accounts Payable, Accounts Receivable, Adding Items from Catalog

Role: Select Option RoadMap: Select Option

3. Click the link labeled End of Year Procedures.

Assignments

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#### New Assignment

Create an Assignment for any Employee or Group

Type: --All Types-- Keyword: end of year

Category: Accounting, Accounts Payable, Accounts Receivable, Advanced Receiving

Subcategory: Accounting Definitions, Accounts Payable, Accounts Receivable, Adding Items from Catalog

Role: Select Option RoadMap: Select Option

Type	Name	Description
Agenda	<a href="#">End of Year Procedures</a>	The content in this agenda will help you understand all of the end-of-year processes performed on Eagle. Pl instructions.

4. Select the **Employee** or **Group** of Employees.
5. **Override Existing Completion Status** if they have previously completed the Agenda.
6. Set the **Start Date** and **Due Date** for each course and test and press **Submit**.

**New Assignment**  
Create an Assignment for any Employee or Group

Fields marked with an asterisk(\*) are required.

Type: Agenda  
Name: End of Year Procedures

Please select the employee or group that will receive this assignment:

\* Employees: Stahr, Staci; Stamper, Jason; **Stanley, Kim**; Staples, Tony; Statler, Nancy

\* Groups: --Select Groups--; All Employees; ANALYTICS; AUTO: Sales; AW EAL NEW GROUP

**Override Existing Completion Status?**  
If you create an assignment for an employee who has previously completed the learning items (course, test, task), check and any that have previously been completed will not be reassigned.

Disable Alerts: --Select Alert--

Optional: Add e-mail addresses to copy on all assignment alerts.  
CC E-mail:

Copy first Start Date and Due Date to all assignments

Assignment #1 Course: End of Year Procedures Overview  
\* Start Date: 12/14/2017  
Due Date:

Assignment #2 Test: End of Year Procedures Overview Test  
\* Start Date: 12/14/2017  
Due Date:

7. You will receive a confirmation message stating that the assignment was created successfully.

**New Assignment**  
Create an Assignment for any Employee or Group

Your assignments have been successfully created. Assignees can view their assignments via the assignment option on the Learning Management System.

[Add another assignment](#)  
[Return to Training Assignments main menu](#)

8. The Courses and Tests will appear on the employee's Home Page and on the Assignments tab.

**My Training Assignments**

Course	<a href="#">End of Year Procedures Overview</a>	(Due: 01/02/2018)
Test	<a href="#">End of Year Procedures Overview Test</a>	(Due: 01/02/2018)
Course	<a href="#">Last Day of the Year Procedures</a>	(Due: 01/02/2018)
Test	<a href="#">Last Day of the Year Procedures Test</a>	(Due: 01/02/2018)
Course	<a href="#">First Day of the Year Procedures</a>	(Due: 01/02/2018)
Test	<a href="#">First Day of the Year Procedures Test</a>	(Due: 01/02/2018)
Course	<a href="#">Key End of Year Inventory Reports</a>	(Due: 01/02/2018)
Test	<a href="#">Key End of Year Inventory Reports Test</a>	(Due: 01/02/2018)
Course	<a href="#">Key End of Year Accounts Receivable Reports</a>	(Due: 01/02/2018)
Test	<a href="#">Key End of Year Accounts Receivable Reports Test</a>	(Due: 01/02/2018)

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Assignments  
Employee Assignments  
View Progress on Open Assignments for Any Employee

Employee: Stanley, Kim

[Add new assignment for this employee.](#)

View: [All Assignments](#) [Open Assignments](#) **Agendas**

Agenda Name

[End of Year Procedures](#)