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ABOUT TRAINING

Accruent Academy believes that helping your users understand our software’s capabilities is the key to your success. In this catalog, you will find all the essential information on how to train the users in your organization to become in-house experts, with technical knowledge to use, manage and maintain your Lucernex solution.

Accruent Academy delivers both standard and custom-built, Instructor-Led, eLearning and MicroLearning training courses for all Lucernex users. Helping users work efficiently not only ensures confidence and accelerates adoption, but also increases your time to value.

An experienced Lucernex Product Trainer leads the virtual classroom, as well as blended and on-site learning sessions. Most training courses end with a knowledge check to verify understanding of the material. Throughout the courses, you can monitor and track the growing performance.

Whether you are new to Lucernex software, part of an implementation team or an experienced user, we have continuous training that will benefit you and your organization.
TRAINING METHODOLOGY

Training courses are aligned with the different phases of the implementation process and will give your organization the expertise that it needs to utilize and maintain our products.

To successfully adopt new solutions and ensure maximum product satisfaction, it is essential that training addresses the needs of your users. A Training Needs Analysis Workshop can be conducted together with your core project team to understand the training requirements of the organization and develop a Training Plan to meet those requirements. The customized Training Plan will include training curriculum, Learning Management System setup, the exact duration of courses and planning for the courses.

For our new users, the timing of training delivery is imperative to a successful implementation. We will provide you with a foundational knowledge of Lucernex and introduce you to the potential Lucernex has for improving your current processes. We aim to better equip you for the decision-making and inevitable discussions that take place in your Discovery and CRP sessions. Your Training Plan will be aligned with your implementation timeline and will serve to supplement the on-the-job training you will receive throughout your project.
DEVELOPMENT FORMATS OF LEARNING

ELEARNING
Accruent’s online learning environment — the Accruent Academy Learning Center — is web-based and can be accessed online with an internet connection. Attendees can register and connect from anywhere in the world and access all training content at any point in time.

All online curricula contain interactive eLearning modules to learn content, simulated exercises for real-time application practice, and knowledge checks to ensure content comprehension. Training completion information can be extracted through reporting, by the assigned training coordinator, and uploaded into your HR system.

INSTRUCTOR LED TRAINING
Accruent classroom training courses are conducted in Austin, Texas, USA, and Hoofddorp, the Netherlands, as well as the customer’s site upon request. The classes allow for a maximum of 10 attendees to ensure high engagement and personal attention.

Attendees are required to bring their laptops. Content is delivered via classroom presentation, and Accruent’s cloud-based virtual machine is used to conduct hands-on exercises in the software.

CUSTOM-BUILT TRAINING
Accruent has its own training department with highly experienced Product Trainers and eLearning developers. We offer custom training courses for different users in your organization. Our team begins this process by scheduling a meeting with you to ensure we are aware of and meet any training needs. Please contact our team if you would like to know more about our custom-built training possibilities.
LUCERNEX CONTRACTS TRAINING PACKAGES

The Accruent Academy offers multiple types of product training via classroom and eLearning format, both standard and custom-built, for Lucernex Contracts users. We offer these courses through learning packages that contain training courses specific to the associated user role.

The following training packages are available for the different roles in your organization:

LEASE END USER

The Lease End User training package is for Lease Administrators and Lease Accountants that use Lucernex daily and are functional users who are mainly responsible for inputting and maintaining the integrity of their data. These users will gain a basic understanding of how Lucernex accommodates the day-to-day functions of a Lease Administrator. The training package contains 3 eLearning courses:

- Lucernex Getting Started
- Lucernex Introduction
- Lucernex Lease Principles

LEASE ADVANCED END USER

The Lease Advanced End User training package is for all Lease Administrators and Lease Accountants that may be daily functional users of Lucernex and are also responsible for asset management and report building for their company. In addition to the day-to-day knowledge of an End User, these users will gain further understanding of asset tracking in the Equipment Contracts module, and the foundations for building and maintaining reports in their system.

The training package contains 3 eLearning courses and 2 virtual classroom sessions. We offer extra learning in this package through MicroLearnings:

- Lucernex Getting Started
- Lucernex Introduction
- Lucernex Lease Principles
- Lucernex Equipment Contracts
- Lucernex Report Building
- Extra Learning:
  - 4 MicroLearnings
LEASE SUPPORT CONTACT

The Lease Support Contact training package is for users that will need to fulfill the certification requirement to become the support contact for their company. These users are the main point of contact for the Accruent Support team and are expected to serve as an internal resource to assist their users with functional and administrative needs. This training package will provide all the operational knowledge for end-users, as well as the technical expertise needed for a system administrator. Support contacts will receive hands-on training through our workshop to adequately prepare them for the certification exam.

The training package contains 4 eLearning courses, 2 virtual classroom sessions, 1 classroom session and an exam. We offer extra learning in this package through MicroLearnings, Tech Talks and help sessions for exam preparation.

- Lucernex Getting Started
- Lucernex Introduction
- Lucernex Lease Configuration
- Lucernex Lease Principles
- Lucernex Equipment Contracts
- Lucernex Report Building
- Lucernex Lease Workshop (Austin, TX)
- Lease Support Certification Exam
- Extra Learning:
  - 4 MicroLearnings
  - Tech Talks
  - Exam Prep Help Sessions

LEASE IT ADMINISTRATOR

The Lease IT Administrator training package is for users that will be internal resources to assist with functional and administrative needs. This training package will provide all the operational knowledge for end-users, as well as, the technical expertise needed for a system administrator.

The training package contains 3 eLearning courses:

- Lucernex Getting Started
- Lucernex Introduction
- Lucernex Lease Configuration
UPGRADE TO SUPPORT CONTACT

The Lease Upgrade to Support Contact training package is for live customers who are replacing an existing certified support contact. This training package will provide all the technical knowledge needed for a system administrator and assumes the person has advanced end user level experience. This package contains hands-on training through our workshop to adequately prepare for the certification exam.

The training package contains an eLearning course, 1 classroom session, and a certification exam. We offer extra learning in this package through Tech Talks and help sessions for exam preparation.

- Lucernex Lease Configuration
- Lucernex Lease Workshop (Austin, TX)
- Lease Support Certification Exam
- Extra Learning:
  - Tech Talks
  - Exam Prep Help Sessions
# Contracts

<table>
<thead>
<tr>
<th>Audience</th>
<th>LEASE END USER</th>
<th>LEASE ADVANCED END USER</th>
<th>LEASE SUPPORT CONTACT</th>
<th>IT ADMIN</th>
<th>UPGRADE TO SUPPORT CONTACT*</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>AUDIENCE</strong></td>
<td>Lease Administrators, Lease Accountants</td>
<td>Lease Administrators, Lease Accountants</td>
<td>Designated Support Contacts</td>
<td>IT Team Members, System Administrators</td>
<td>Live customer is replacing Support Contact</td>
</tr>
<tr>
<td><strong>ELEARNING</strong></td>
<td>Lucernex Getting Started, Lucernex Introduction</td>
<td>Lucernex Getting Started, Lucernex Introduction</td>
<td>Lucernex Getting Started, Lucernex Introduction</td>
<td>Lucernex Getting Started, Lucernex Introduction</td>
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<td><strong>CLASSROOM</strong>**</td>
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<td>Lucernex Lease Workshop, Lucernex Lifecycle Workshop</td>
<td>Lucernex Lease Workshop, Lucernex Lifecycle Workshop</td>
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<td>Lucernex Lease Workshop, Lucernex Lifecycle Workshop</td>
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<td><strong>EXTRAS</strong>*</td>
<td>4 MicroLearnings</td>
<td>4 MicroLearnings, Tech Talks and Exam Prep Help Sessions</td>
<td>-</td>
<td>-</td>
<td>Tech Talks and Exam Prep Help Sessions</td>
</tr>
</tbody>
</table>

* The “Upgrade to Support Contact” package is only available for users with a Lease Advanced End User package.
** The “Lucernex Lease Workshop” has a duration of 2 days & the “Lucernex Lifecycle Workshops” has a duration of 3 days.
*** MicroLearning is our standard bite-size learning content which focuses on a specific topic. The duration is between 1-6 minutes.
LUCERNEX CONTRACTS TRAINING COURSES

Below you can find a description of all our Lucernex Contracts Training courses within the described packages above.

GETTING STARTED

Length
15 min

Training Type
eLearning video

Course Overview
These short in-product videos, available to every user of Lucernex from the Global Toolbar, demonstrate the basics of using Lucernex upon your initial login to the software.

Course Topics
- Login Information
- Basic Navigation
- Dashboard and Configuration
LUCERNEX INTRODUCTION

Length 25 min

Training Type eLearning module

Course Overview
The Lucernex Introduction training will guide all Lucernex users through the concepts of Lucernex as a full lifecycle solution. It includes a short overview to review the different modules available for Lifecycle and Lease Administration customers. The training explains the components of each module and demonstrates its uses.

Course Objectives
• Identify the different modules available for Lifecycle and Lease Administration customers
• Explain the components of each module and demonstrate their uses
• Explain basic entity navigation, entity search, and User Dashboard configuration

Course Topics
• Lucernex Overview
• Entity Overview
• Basic Navigation
• Dashboard and Configuration
LUCERNEX LEASE CONFIGURATION

Length: 3 hours
Training Type: eLearning module

Course Overview
The Lucernex Lease Configuration training provides the dedicated Lucernex Support Contacts and IT Administrators a basic overview of all administrative functionalities pertinent to the Contracts Module of Lucernex. This training is a combination of recorded lectures, videos, interactive simulated exercises and knowledge checks.

Course Objectives
- Manage and maintain the configuration of a company’s Lucernex firm
- Understand the system administrative functionalities
- Feel confident and self-sufficient when working with the System Administrator Dashboard

Course Topics
- Real Estate Lifecycle Overview
- Member Administration
- Entity Creation
- Folders
- Pages
- Data Fields
LUCERNEX LEASE PRINCIPLES

Length
4 hours

Training Type
eLearning modules

Course Overview
The Lucernex Lease Principles training provides daily Lucernex users and Support Contacts a basic overview of all components in the Contracts Module of Lucernex. This training is a combination of recorded lectures, videos, interactive simulated exercises and knowledge checks.

Course Objectives
• Learn to input and maintain reliable data in the system
• Understand standard functionalities for Lease Administration and Lease Accounting
• Feel confident with the daily use of Lucernex

Course Topics
• Lifecycle Overview
• Abstract Information
• Payment Information
  o Transactions
  o Recurring Expenses
  o Setup Wizard
  o Recoveries
  o Percentage Rent
  o Alternate Rent and Offsets
  o Allowances, Security Deposits, and Receipts
  o Accruals
• Accounting Information
• Document Viewer
• Reporting
LUCERNEX EQUIPMENT CONTRACTS

Length
3.5 Hours

Training Type
Virtual Classroom

Course Overview
The Lucernex Equipment Contracts training provides Advanced Lucernex users and Support Contacts a basic overview of all components in the Equipment Contracts Module of Lucernex. This training builds upon the Lease Principles concepts as it pertains to equipment leases.

Course Objectives
- Learn to input and maintain reliable data in the system
- Understand standard functionalities for Lease Administration and Lease Accounting related to equipment leases.
- Feel confident with the daily use of Lucernex

Course Topics
- Equipment Contract Overview
- Equipment Contract Setup
- Assigning Assets to Equipment Contracts
- Equipment Payment Schedules
- Rent Processes
- Accounting Schedules
LUCERNEX REPORT BUILDING

Length
4.5 Hours

Training Type
Virtual Classroom

Course overview
The Lucernex Report Building training is a deep dive for Advanced Lucernex users and Support Contacts to have a better understanding of the reporting tool and database tables. This is an advanced course intended for those users that are familiar with the software and actively need to create reports.

Course objectives
- Understand database table relationships in terms of report building
- Explain and demonstrate the different types of reports supported by Lucernex
- Feel confident independently creating reports

Course Topics
- Introduction
  - Report Navigation
  - Global Reports
- Understanding Tables
- Report Basics
  - Report Types
  - Output Types
- Report Building
- Report Administration
  - Folder Structure
  - Security Privileges
  - Scheduled Jobs
  - Dashboard Reports
  - Report Buttons
LUCERNEX LEASE WORKSHOP

Length
2 days

Training Type
Classroom

Course Overview
The Lucernex Lease Workshop training covers the basic system administrative responsibilities of a Support Contact. This training is an in-person training that provides the opportunity for hands-on practice with the software and assumes prerequisite courses are completed. There are guided and independent functional lease scenarios and a configuration demonstration to complete.

Course Objectives
- Learn to troubleshoot and resolve issues to support their end-users
- Understand configuration options
- Feel confident with configuring and maintaining their Lucernex firm

Course Topics
- Contract Abstraction
  - Setup Wizards
- Payment Information
  - Recurring Expenses
  - Transactions
  - Rent Processes
  - Alternate Rent
  - Scheduled Offsets
  - Recoveries
  - Percentage Rent
- Accruals
- Accounting Information
- Persons
  - Employers vs Vendors
- Members and Contacts
- Membership and Security
- UI Configuration
  - Data Fields
    - Global vs Firm Fields
    - Custom Lists
  - Page Layouts
    - Sub-pages
    - Summary Pages
    - List Layouts
    - Setup Pages
- Folders and Binders
- Reporting
**LUCERNEX LEASE SUPPORT CERTIFICATION EXAM**

**Length**
2 hours

**Training Type**
Exam

**Course Overview**
The Lucernex Lease Support Certification Exam tests that the Support Contact has the level of knowledge needed to perform the basic system administrative activities required to support end users and configure and maintain their Lucernex firm.

**Exam Objectives**
- Certify that the designated Support Contact has the knowledge necessary to perform the role

**Exam Topics**
- Lease Principles
- Lease Configuration
- Lease Workshop
LUCERNEX LIFECYCLE TRAINING PACKAGES

The Accruent Academy offers different types of product training via classroom and eLearning format, both standard and custom-built, for the Lucernex Lifecycle users. We offer these courses through learning packages that contain the training courses that apply to the associated user role.

The following training packages are available for the different roles in your organization:

LUCERNEX LIFECYCLE ADVANCED END USER

The Lifecycle Advanced End User training package is for advanced Lucernex users that will need to be familiar with the configuration of their Lucernex firm. These users will have a key role in the maintenance of their Lucernex role and be highly involved throughout the implementation project.

The training package contains 3 eLearning courses and 1 virtual classroom session. We offer extra learning in this package through MicroLearnings.

- Lucernex Getting Started
- Lucernex Introduction
- Lucernex Lifecycle Configuration
- Lucernex Report Building
- Extra Learning:
  - 4 MicroLearnings
LUCERNEX LIFECYCLE SUPPORT CONTACT

The Lifecycle Support Contact training package is for users that will need to fulfill the certification requirement to become the support contact for their company. These users are the main point of contact for the Accruent Support team and are expected to serve as an internal resource to assist their users with functional and administrative needs. This training package will provide all the operational knowledge for end-users, as well as the technical expertise needed for a system administrator. Support contacts will receive hands-on training through our workshop to adequately prepare them for the certification exam.

The training package contains 3 eLearning courses, 1 virtual classroom session, 1 classroom session, and an exam. We offer extra learning in this package through MicroLearnings, Tech Talks and help sessions for exam preparation.

- Lucernex Getting Started
- Lucernex Introduction
- Lucernex Lifecycle Configuration
- Lucernex Report Building
- Lucernex Lifecycle Workshop (Austin, TX)
- Lease Support Certification Exam
- Extra Learning:
  - 4 MicroLearnings
  - Tech Talks
  - Exam Prep Help Sessions
LUCERNEX UPGRADE TO SUPPORT CONTACT

The Lifecycle Upgrade to Support Contact training package is for live customers who are replacing an existing certified support contact. This training package will provide all the technical knowledge needed for a system administrator and assumes the person has advanced end user level experience. This package contains hands-on training through our workshop, to adequately prepare for the certification exam.

The training package contains an eLearning course, 1 classroom session and a certification exam. We offer extra learning in this package through Tech Talks and help sessions for exam preparation.

- Lucernex Lifecycle Workshop (Austin, TX)
- Lifecycle Support Certification Exam
- Extra Learning:
  - Tech Talks
  - Exam Prep Help Sessions
# LIFECYCLE

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<thead>
<tr>
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<th>Lifecycle Advanced Users</th>
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<td>Extras</td>
<td>4 MicroLearnings</td>
<td>4 MicroLearnings, Tech Talks and Exam Prep Help Sessions</td>
<td>Tech Talks and Exam Prep Help Sessions</td>
</tr>
</tbody>
</table>

* The "Upgrade to Support Contact" package is only available for users with a Lifecycle Advanced End User package.

** The "Lucernex Lease Workshop" has a duration of 2 days & the "Lucernex Lifecycle Workshops" has a duration of 3 days.

*** MicroLearning is our standard bite-size learning content which focuses on a specific topic. The duration is between 1-6 minutes.
LUCERNEX LIFECYCLE TRAINING COURSES

Below you can find a description of all our Lucernex Lifecycle Training courses within the described packages above.

LUCERNEX LIFECYCLE CONFIGURATION

<table>
<thead>
<tr>
<th>Length</th>
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<tbody>
<tr>
<td>Training Type</td>
<td>eLearning modules</td>
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Course Overview
The Lucernex Lifecycle Configuration training provides advanced Lucernex users and Support Contacts a basic overview of all administrative functionalities pertinent to the Lifecycle Modules in Lucernex. This training is a combination of lecture videos, interactive simulated exercises and knowledge checks.

Course Objectives
- Manage and maintain the configuration of the company’s Lucernex firm
- Understand the system administrative functionalities
- Feel confident and self-sufficient when working with the System Administrator Dashboard

Course Topics
- Real Estate Lifecycle Overview
- Member Administration
- Entity Creation
- Folders
- Pages
- Data Fields
LUCERNEX REPORT BUILDING

Length 4.5 Hours  
Training Type Virtual Classroom

Course overview
The Lucernex Report Building training is a deep dive for Advanced Lucernex users and Support Contacts to have a better understanding of the reporting tool and database tables. This is an advanced course intended for those users that are familiar with the software and actively need to create reports.

Course objectives
- Understand database table relationships in terms of report building
- Explain and demonstrate the different types of reports supported by Lucernex
- Feel confident independently creating reports

Course Topics
- Introduction
  - Report Navigation
  - Global Reports
- Understanding Tables
- Report Basics
  - Report Types
  - Output Types
- Report Building
- Report Administration
  - Folder Structure
  - Security Privileges
  - Scheduled Jobs
  - Dashboard Reports
  - Report Buttons
LUCERNEX LIFECYCLE WORKSHOP

Length
3 days

Training Type
Classroom

Course Overview
The Lucernex Lifecycle Workshop training covers the basics system administrative responsibilities of a Support Contact. This training is an in-person training that provides the opportunity for hands-on practice with the software. There are guided and independent functional lease scenarios and a configuration demonstration to complete.

Course Objectives
• Learn to troubleshoot and resolve issues to support their end users
• Understand configuration options
• Feel confident with configuring and maintaining their Lucernex firm

Course Topics
• User Dashboard
• Persons
  o Employers vs Vendors
  o Members and Contacts
  o Membership and Security
• Setup Wizard
• UI Configuration
  o Data Fields
    ▪ Global vs Firm Fields
    ▪ Custom Lists
  o Page Layouts

  ▪ Sub-pages
  ▪ Summary Pages
  ▪ List Layouts
  ▪ Setup Pages
  o Folders and Binders
  o Budget Templates
  o Schedule Templates
    ▪ Milestone Templates
  o Custom Lists
  o Forms
  o Workflows
• Reporting
LUCERNEX LIFECYCLE SUPPORT CERTIFICATION EXAM

Length  
2 hours

Training Type  
Exam

Course Overview
The Lucernex Lifecycle Support Exam tests that the Support Contact has the level of knowledge needed to perform the basic system administrative activities required to support end users and configure and maintain their Lucernex firm.

Exam Objectives
- Certify that the designated Support Contact has the knowledge necessary to perform the role

Exam Topics
- Lifecycle Configuration
- Lifecycle Workshop
# Training Timeline

For our new users, the timing of training delivery is imperative to a successful implementation. We will provide you with a foundational knowledge of Lucernex and introduce you to the potential Lucernex has for improving your current processes. We aim to better equip you for the decision-making and inevitable discussions that take place in your Discovery and CRP sessions. Your Training Plan will be aligned with your implementation timeline and will serve to supplement the on-the-job training you will receive throughout your project. Following is an example recommended timeline for training during the implementation project.

<table>
<thead>
<tr>
<th>PHASE</th>
<th>Contracts</th>
<th>Lifecycle</th>
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<td>Lease Advanced End User</td>
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<tr>
<td>Kick off</td>
<td>Lucernex Introduction</td>
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<td>Discovery</td>
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<td>Lucernex Equipment Contract</td>
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<td>CRP #2</td>
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<td>Lucernex Lease Principles</td>
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<td>CRP #3</td>
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</tr>
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</table>
ADDITIONAL PRODUCTS

ELEARNING FILES

Lucernex eLearning file delivery

When customers are already using an internal Learning Management System (LMS), Accruent Academy can deliver our standard eLearning files to upload into our customer’s LMS to be used to train an unlimited amount of end users. The approved courses are offered in SCORM or AICC format.

Available training courses for this option:

- Lucernex Introduction Course
- Lucernex Lease Principles

CUSTOM BUILT

Lucernex Custom Training

We can provide training tailored to your environment, built from a collaboration between our Product Trainers and your Subject-matter Expert. The provided deliverables are eLearning files that can be uploaded into your LMS system, or classroom materials that can be reused for future training sessions.

Lucernex Training Needs Analysis Workshop

A Lucernex Training Needs Analysis Workshop can be conducted together with your core project team to understand the training requirements of the organization and develop a Training Plan to meet those requirements. This Training Plan includes the training details per training course: i.e., training curriculum, Learning Management System setup, the duration of courses and planning for the courses.
ADDITIONAL PRODUCTS

Workshop Structure

- Part 1 – One-hour remote session for introduction, information and planning for Training Needs Analysis Workshop
- Part 2 – Up to 4 remote sessions of 2 hours conducting the training needs analysis. This could also be done on-site in 1 day (Note that this excludes associated travel costs.)
- Part 3 – 1 remote session of 1 hour to review the plan and follow-up steps
- Part 4 – Signoff and planning

Lucernex Custom End User Training Courses via eLearning

When training groups of users in multiple locations or larger groups, we recommend training via eLearning courses. When customers are already using an internal Learning Management System (LMS), Accruent Academy proposes to create customized eLearning courses that can be uploaded and used within the customers LMS.

Multiple training courses can be developed to accommodate all applicable training groups. Accruent Academy develops customized eLearning training courses using professional authoring tools. A highly knowledgeable Product Trainer will write the content for your course in collaboration with a Subject-matter Expert. Afterward, a highly experienced eLearning developer will develop a customized course in your branding and aligned with your business processes. The courses are delivered in SCORM or AICC format. When other languages are required, you can choose to subtitle or fully narrate the eLearning courses in the multiple languages.
ON DEMAND

Training On-site

Lucernex Instructor Led Classroom Training – Standard or Customized
The Accruent Academy offers training that provides individual attention while you learn about the new system. Since the Lucernex solution can be customized to your business processes, it is important to receive training on your specific system. Accruent makes this easier by allowing you to train users at your location using your configuration.

The Accruent Academy provides classroom training using either standard or custom-built course materials to train your users. The recommended number of attendees for this class is between 3 and 6. Registration is limited to 10 attendees per class for one Product Trainer. Ask our Sales Advisor: Olaf Nilssen (olaf.nilssen@accruent.com) for more options.
TRAINING CALENDAR

2020

LUCERNEX TRAINING RELEASE CALENDAR

January

February

March

April

May

June

July

August

September

October

November

December

Current courses:
- Lucernex ILT | Lease Workshop
- Lucernex ILT | Lifecycle Workshop
- Lucernex ILT | Exam Prep Help Session (Lease and Lifecycle)
- Lucernex (V)ILT | Equipment
- Lucernex (V)ILT | Report building

Legacy courses:
- Lucernex ILT | Lease Admin (retiring after Q2)
- Lucernex ILT | System Administrator (retiring after Q1)

Holiday
Please contact the Accruent Academy for more information on Lucernex Training

Catalog Disclosure

The online catalog is converted to a PDF and published once a year. All information in the published and PDF versions of the catalog is correct at the time of publication. However, Accruent Academy reserves the right to change its policies or course offerings at any time.