



CUSTOMER TRAINING



TABLE OF CONTENTS

ABOUT TRAINING	4
Training Methodology	5
Delivery Formats Of Learning	6
Standard Training By Role.....	7
Available Add-On Training By Role.....	8
Lucernex Standard Training Courses – All Users	9
Lucernex Introduction	9
Lucernex Report Building	10
Lucernex Standard Training Courses – Lease Users.....	11
Lucernex Lease Principles.....	11
Lucernex Lease Configuration.....	12
Lucernex Equipment Contracts.....	13
Lucernex Lease Support Contact Exam	14
Lucernex Standard Training Courses – Lifecycle Users	15
Lucernex Lifecycle Principles	15
Lucernex Lifecycle Bidding	16
Lucernex Lifecycle Configuration	17
Lucernex Lifecycle Support Contact Exam	18
Lucernex Add-On Training Courses.....	19
Lucernex Equipment Contracts - Advanced	19
Lucernex Report Building - Advanced	20
Lucernex Lease Workshop.....	21
Lucernex Lifecycle Workshop.....	22

One On One Q&A Session With Product Trainer	23
Training Timeline.....	24
Additional Products	25

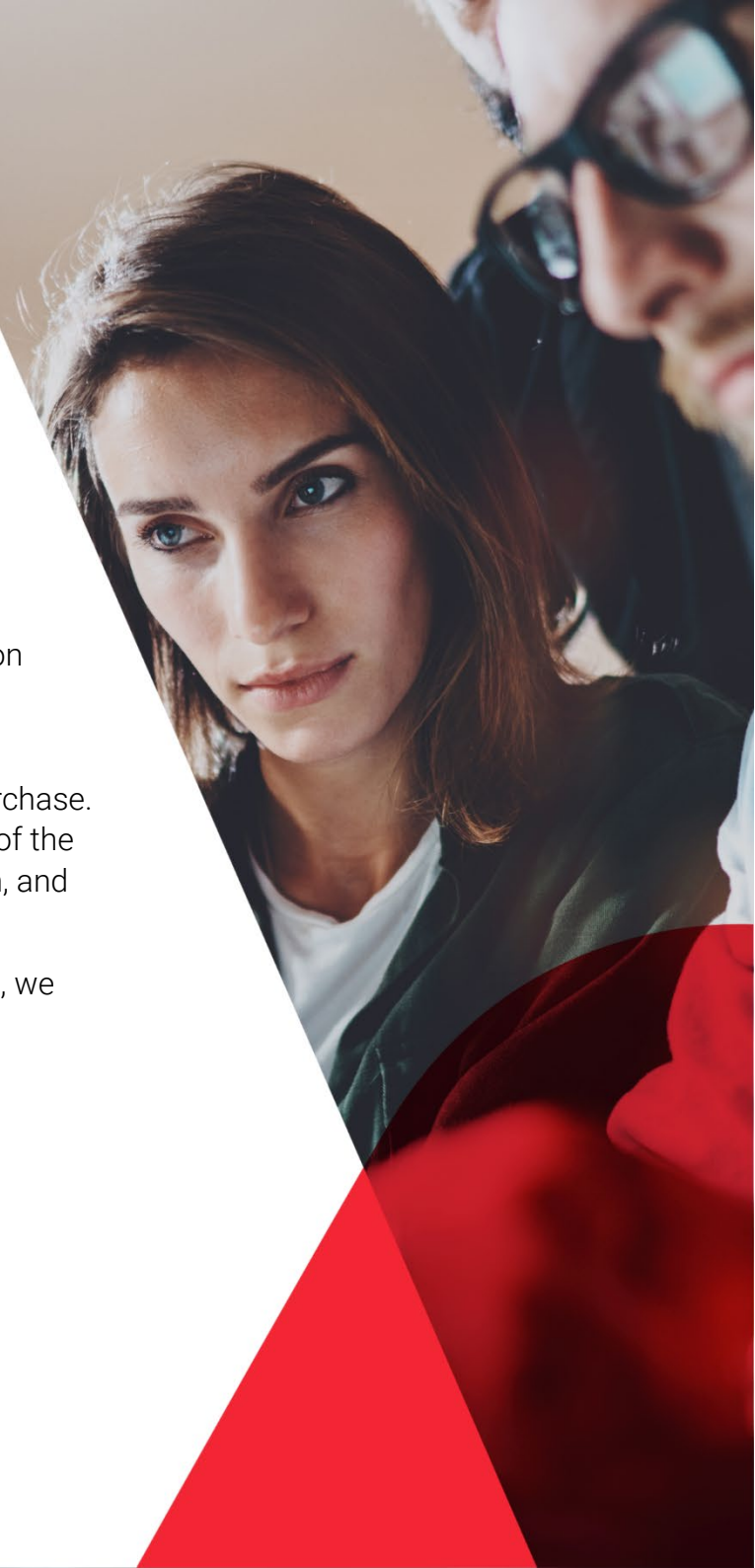
ABOUT TRAINING

Accruent Academy believes that helping your users understand our software's capabilities to quickly become proficient in the new systems is the key to your success. This takes serious training. The success of a major software application deployment or upgrade has a direct correlation with the thoroughness of the training provided. Accruent Academy is the solution to add value to the digital transformation occurring in your organization and enable your users to get the most out of their Accruent software.

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 world-class training solutions standard with your Lucernex software purchase. Instead of purchasing separate training courses, a set of training licenses will be included as a part of the software product, increasing training access and leading to faster enablement, higher user adoption, and greater software ROI.

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

Our training courses will give your organization the expertise needed to utilize and maintain our products and are aligned with the different phases of the implementation process.

Our standard training portfolio contains the training needed to ensure your end users, system administrators, and support contacts have the knowledge and skills necessary to get the most out of your Lucernex software.

The standard training courses include online eLearning courses as well as a targeted MicroLearning with content presented through demonstration videos, animated lectures, interactive text and graphics, and practice software simulations.

For additional in-depth training Accruent Academy also offers Add-On courses that can be purchased to supplement and expand on the provided standard training. Add-Ons include instructor led training, both virtual and in-person, with an expert Lucernex Product Trainer.

To successfully adopt new solutions and ensure maximum product satisfaction, it is essential that training addresses the needs of your users. Custom training solutions can be developed to tailor the learning experience to your specific users and business processes. Each custom training project begins with a Training Needs Analysis workshop. This is conducted together with your core project team to understand the training requirements of your organization and develop a Training Plan to meet those unique requirements. 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.



DELIVERY FORMATS OF LEARNING

eLEARNING



Accruent's online learning environment – the Accruent Academy Learning Center – is web-based so you can access your training anywhere. Learners can register and connect from anywhere in the world to access their training content at any point in time.

All online training courses contain interactive eLearning modules to learn about the software, simulated exercises for real-time application practice, and knowledge checks to ensure content comprehension. Training completion information can be viewed and exported through reporting, by the assigned training coordinator.

INSTRUCTOR LED TRAINING

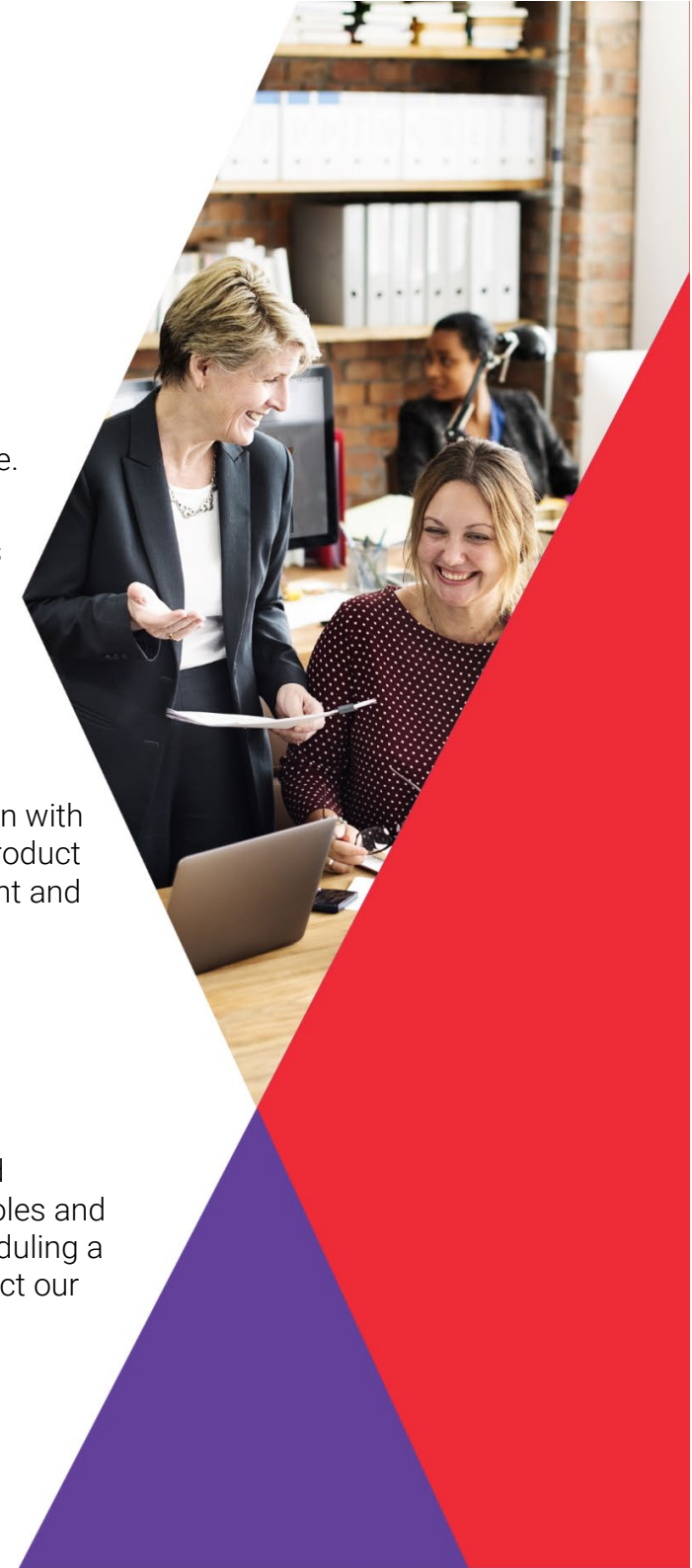


Virtual instructor led courses are also offered to combine the benefits of live instruction with the flexibility of online learning. These courses are led by our highly skilled Lucernex Product Trainers. The classes allow for a maximum of 10 attendees to ensure high engagement and personal attention. In person sessions are also available at the customers location.

CUSTOM-BUILT TRAINING



Accruent has its own training department with highly experienced Product Trainers and eLearning Developers. We offer custom training courses tailored to the different user roles and unique business processes 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.



STANDARD TRAINING BY ROLE – INCLUDED

Accruent Academy provides standard Lucernex training courses included with your software contract for 25 users per customer account. These standard training courses are organized into Learning Paths by user role, so users can focus their learning on the courses that are most applicable to their position. The following Learning Paths are defined for Lease and Lifecycle users. More detailed information on all courses is provided in subsequent sections. Additional standard training users can be purchased, as needed.

Course	Format	Role			
		Lease End User	Lease Support Contact	Lifecycle End User	Lifecycle Support Contact
Introduction	eLearning	x	x	x	x
Lease Principles	eLearning	x	x		
Report Builder	eLearning	x	x	x	x
Equipment Contracts	eLearning	x	x		
Lease Configuration	eLearning		x		
Lifecycle Principles	eLearning			x	x
Lifecycle Configuration	eLearning				x
Lifecycle Bidding	eLearning			x	x
Lease Support Contact Exam	eLearning		x		
Lifecycle Support Contact Exam	eLearning				x
Spreadsheet Imports Microlearning	eLearning	x	x	x	x

AVAILABLE ADD-ON TRAINING BY ROLE

Accruent Academy also offers additional training courses for purchase via Accruent Academy or Statement of Work (SOW). More detailed information on all courses is provided in subsequent sections.

Course	Format	Role			
		Lease End User	Lease Support Contact	Lifecycle End User	Lifecycle Support Contact
Equipment Contracts - Advanced	Virtual Instructor Led	x	x		
Report Builder – Advanced	Virtual Instructor Led	x	x	x	x
Lease Workshop	Virtual Instructor Led	x	x		
Lifecycle Workshop	Virtual Instructor Led			x	x
General Product Q&A Session	Virtual Instructor Led	x	x	x	x

LUCERNEX STANDARD TRAINING COURSES – ALL USERS

Accruent Academy offers the following standard training courses for all Lucernex users, included with the software contract.

LUCERNEX INTRODUCTION

Length

25 min

Training Type

eLearning modules

Course Overview

The Lucernex Introduction training will 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 customers. The training explains the components of each module and demonstrates their uses.

Course Objectives

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

Key Tasks: Interpreting what each module is used for, explaining how records are related in Lucernex, searching for records, customizing your User Dashboard

Course Topics

- Lucernex Overview
- Entity Overview
- Basic Navigation
- Dashboard and Configuration

Course Audience

- All Lucernex users

LUCERNEX REPORT BUILDING

Length

2 Hours

Training Type

eLearning modules

Course Overview

The Lucernex Report Building training is a deep dive for Lucernex users 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. This training is a combination of animated lectures, videos, interactive simulated exercises, and knowledge checks.

Course Objectives

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

Key Tasks: Finding reports in the system, explaining the different standard report options, interpreting the Report Builder interface, organizing reports, and managing security privileges

Course Topics

- Report Navigation
- Understanding Tables
 - Lowest-Level Table Reporting
 - Foreign Key Fields
- Report Builder Interface
- Report Basics
 - Report Types
 - View Types
 - Report Building
 - Global Report Templates
- Report Administration
 - Dashboard Reports
 - Scheduled Jobs
 - Security Settings

Course Audience

- All Lucernex Users

LUCERNEX STANDARD TRAINING COURSES – LEASE USERS

The Accruent Academy offers the following standard training courses for Lucernex Lease users, included with the software purchase or renewal.

LUCERNEX LEASE PRINCIPLES

Length

4 hours

Training Type

eLearning modules

Course Overview

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

Course Objectives

- Input and maintain reliable data in the system
- Employ standard functionalities for Lease Administration and Lease Accounting
- Feel confident with the daily use of Lucernex

Key Tasks: Capturing lease data, executing payment, and accounting processes, managing pertinent documents

Course Topics

- Lifecycle Overview
- Abstract Information
- Transactions
- Recurring Expenses
- Recoveries
- Percentage Rent
- Alternate Rent and Offsets
- Allowances, Security Deposits, and Receipts
- Accruals
- Accounting Information
- Document Viewer

Course Audience

- Lucernex Lease End User
- Lucernex Lease Support Contacts

LUCERNEX LEASE CONFIGURATION

Length

3 hours

Training Type

eLearning modules

Course Overview

The Lucernex Lease Configuration training provides the System Administrators an overview of all administrative functionalities pertinent to the Lucernex Contracts Module. This training is a combination of animated lectures, videos, interactive simulated exercises, and knowledge checks.

Course Objectives

- Manage and maintain the configuration of a company's Lucernex firm
- Navigate and use the system administrative functionalities
- Feel confident and self-sufficient when working with the System Administrator Dashboard

Key Tasks: Managing Lucernex members and security privileges, creating new records, organizing document management processes, maintaining the user interface

Course Topics

- Real Estate Lifecycle Overview
- Member Administration
- Entity Creation
- Folders
- Pages
- Data Fields
- Financial Settings

Course Audience

- Lucernex Lease Support Contacts

LUCERNEX EQUIPMENT CONTRACTS

Length

2 Hours

Training Type

eLearning modules

Course Overview

The Lucernex Equipment Contracts training provides Lucernex users a basic overview of all components in the Lucernex Equipment Contracts Module. This training builds upon the Lease Principles concepts as it pertains to equipment leases. This training is a combination of animated lectures, videos, interactive simulated exercises, and knowledge checks.

Course Objectives

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

Key Tasks: Capturing asset-level data, executing payment, and accounting processes, managing pertinent documents

Course Topics

- Equipment Contract Overview
- Equipment Contract and Asset Setup
- Equipment Payment Schedules
- Equipment Payment Processes
- Equipment Accounting Schedules

Course Audience

- Lucernex Lease End Users
- Lucernex Lease Support Contacts

LUCERNEX LEASE SUPPORT CONTACT EXAM

Length

2 hours

Training Type

Exam

Course Overview

The Lucernex Lease Support Contact 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 preparation materials are included.

Exam Objectives

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

Exam Topics

- Lease Principles
- Lease Configuration
- Equipment Contracts
- Report Builder

Exam Audience

- Lucernex Lease Support Contacts

LUCERNEX STANDARD TRAINING COURSES – LIFECYCLE USERS

The Accruent Academy offers the following standard training courses for Lucernex Lifecycle users.

LUCERNEX LIFECYCLE PRINCIPLES

Length

4 hours

Training Type

eLearning modules

Course Overview

This course guides Lucernex users through the fundamentals of the Lifecycle sub-modules. It explores the Lifecycle functionalities as they pertain primarily to the Projects Module. However, many features are applicable in the other Lucernex modules and are executed similarly. This training is a combination of animated lectures, videos, interactive simulated exercises, and knowledge checks.

Course Objectives

- Explain the purpose and use for each Lifecycle sub-module
- Input and maintain reliable data in Lucernex
- Identify the impact of the high configurability in the Lifecycle sub-modules

Key Tasks: Inputting budget information, creating and maintaining schedules, capture data using forms, execute processes through workflows

Course Topics

- Lifecycle Overview
- Budgets
- Schedules
- Forms
- Workflows

Course Audience

- Lucernex Lifecycle End Users
- Lucernex Lifecycle Support Contacts

LUCERNEX LIFECYCLE BIDDING

Length

3 Hours

Training Type

eLearning modules

Course Overview

This course guides Lucernex users through the different user roles within the Bidding sub-module in Lucernex. It demonstrates the bidding configurations set by System Administrators as well as highlights the responsibilities of the Bid Managers and Bidders. This training is a combination of animated lectures, videos, interactive simulated exercises, and knowledge checks.

Course Objectives

- Explain the purpose and function of the Bidding sub-module in Lucernex
- Identify the various user roles within the Bidding sub-module
- Explain how to configure the Bid Packages, Summary Pages and Security settings necessary for Bidding
- Define the Bid Manger responsibilities and explain their purpose
- Demonstrate who to execute bidding as a Bidder

Key Tasks: Setting up and managing the Bidding sub-module, Managing the Bidding process within Lucernex, Submitting Bids in Lucernex

Course Topics

- Introduction to the Bidding Sub-Module
- Bidding Roles
- Bidding Configurations
- Bid Manager Responsibilities
- How-to Submit Bids

Course Audience

- Lucernex Lifecycle End Users
- Lucernex Lifecycle Support Contacts

LUCERNEX LIFECYCLE CONFIGURATION

Length

3 hours

Training Type

eLearning modules

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 animated lectures, videos, interactive simulated exercises, and knowledge checks.

Course Objectives

- Manage and maintain the configuration of the company's Lucernex firm
- Navigate and use the system administrative functionalities
- Feel confident and self-sufficient when working with the System Administrator Dashboard

Key Tasks: Managing Lucernex members and security privileges, creating new records, organizing document management processes, maintaining the user interface, implementing, and executing processes through workflows

Course Topics

- Real Estate Lifecycle Overview
- Member Administration
- Entity Creation
- Folders
- Pages
- Data Fields
- Budgets
- Schedules
- Forms
- Workflows

Course Audience

- Lucernex Lifecycle Advanced End Users
- Lucernex Lifecycle Support Contacts

LUCERNEX LIFECYCLE SUPPORT CONTACT EXAM

Length

2 hours

Training Type

Exam

Course Overview

The Lucernex Lifecycle Support Contact 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 preparation materials are included.

Exam Objectives

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

Exam Topics

- Lifecycle Principles
- Lifecycle Configuration
- Lifecycle Workshop

Exam Audience

- Lucernex Lifecycle Support Contacts

LUCERNEX ADD-ON TRAINING COURSES

The Accruent Academy offers the following Add-on training courses for Lucernex users. These can be purchased through Accruent Academy or a statement of work.

LUCERNEX EQUIPMENT CONTRACTS - ADVANCED

Length

4 Hours

Training Type

Virtual Classroom

Course Overview

The Lucernex Equipment Contracts – Advanced is a virtual instructor led training that provides Lucernex Lease users more detail and hands-on activities on all components in the Equipment Contracts Module of Lucernex. This training builds upon the standard Equipment Contracts course.

Course Objectives

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

Key Tasks: Capturing asset-level data manually and through importing, executing payment and accounting processes at the asset-level

Course Topics

- Equipment Contract Overview
- Equipment Contract Setup
- Assigning Assets to Equipment Contracts
- Equipment Payment Schedules
- Rent Processes
- Accounting Schedules

Course Audience

- Lucernex Lease Advanced Users

LUCERNEX REPORT BUILDING - ADVANCED

Length

4 Hours

Training Type

Virtual Classroom

Course Overview

The Lucernex Report Building - Advanced training is a virtual instructor led training that provides a deep dive for Lucernex users to have a better understanding of the reporting tool and database tables through hands-on practice. This is an advanced course intended for those users that are familiar with the software and actively need to create reports.

Course Objectives

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

Key Tasks: Creating one of each report type, managing reporting organization and security, creating automation and summary page shortcuts

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

Course Audience

- Lucernex Advanced Users

LUCERNEX LEASE WORKSHOP

Length

2 days or 4 sessions, 4 hours each

Training Type

Virtual Classroom

Course Overview

The Lucernex Lease Workshop is a virtual instructor led training that provides the opportunity for hands-on practice with the software and builds on the standard Lucernex Lease courses. 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
- Navigate and use configuration options
- Feel confident with configuring and maintaining their Lucernex firm

Key Tasks: Interpreting standard functionalities and identifying configurable areas, Implementing, and executing payment and accounting processes, Maintaining the user interface

Course Topics

- Contract Abstraction
- Payment Information
- Accounting Information
- Member Administration
- UI Configuration

Course Audience

- Lucernex Lease Advanced Users

LUCERNEX LIFECYCLE WORKSHOP

Length

3 days or 5 sessions, 4.5 hours each

Training Type

Virtual Classroom

Course Overview

The Lucernex Lifecycle Workshop is a virtual instructor led training 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
- Identify configuration options
- Feel confident with configuring and maintaining their Lucernex firm

Key Tasks: Maintaining the user interface, managing Lucernex users and security privileges, implementing, and executing processes through workflows

Course Topics

- User Dashboard
- Member Administration
- Setup Wizard
- UI Configuration
- Document Management
- Budgets
- Schedules
- Custom Lists
- Forms
- Workflows
- Reporting

Course Audience

- Lucernex Lifecycle Advanced Users

ONE ON ONE Q&A SESSION WITH PRODUCT TRAINER

Length

2 hours

Training Type

Virtual Classroom

Course Overview

This is a one-on-one session with an experienced product trainer, providing learners the ability to ask questions on Lucernex topics.

Course Objectives

- Answer questions regarding Lucernex Lease and Lifecycle products

Course Topics

- Topics to be reviewed will depend on the questions asked during the session

Course Audience

- All Lucernex Lease and Lifecycle Users

RECOMMENDED TIMELINE

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 during your implementation project. Following is an example recommended timeline for training during the implementation project.

	LEASE			LIFECYCLE		
PHASE	Lease End User	Lease Advanced End User	Lease Support Contact	Lifecycle End User	Lifecycle Advanced End User	Lifecycle Support Contact
Kick off			Lucernex Introduction		Lucernex Introduction	Lucernex Introduction
Discovery			Lucernex Lease Principles		Lucernex Lifecycle Principles	Lucernex Lifecycle Principles
CRP #1			Lucernex Lease Configuration Lucernex Equipment Contract		Lucernex Lifecycle Configuration	Lucernex Lifecycle Configuration
CRP #2					Lucernex Bidding	Lucernex Bidding
CRP #3	Lucernex Introduction Lucernex Lease Principles	Lucernex Introduction Lucernex Lease Principles Lucernex Equipment Contracts Lucernex Report Building	Lucernex Report Building	Lucernex Introduction Lucernex Lifecycle Principles	Lucernex Report Building	Lucernex Report Building
UAT			Lucernex Lease Support Contact exam			Lucernex Lifecycle Support Contact Exam
Go Live						

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
- Lucernex Lifecycle Principles

MICROLEARNINGS

Accruent Academy offers MicroLearnings as an economical option for semi-customized training. A MicroLearning is our standard bite-size learning content which focuses on a specific topic or task, approximately 4-6 minutes in duration. MicroLearnings include text, screen shots, video demonstrations and a quiz. This is a targeted micro training option that allows your organization to focus on a feature or process that will have the most impact on your business.

MicroLearnings can be customized to your organization's branding and the content can be recorded on your Accruent software environment. They are delivered in SCORM or AICC format that can be loaded into your organization's Learning Management System or placed in a shared location for access. MicroLearnings can be purchased in packs of 5, 7, 10, 15, and 20.

TECHTALKS

Accruent Academy offers TechTalks that cover technical concepts and tasks that are valuable to share with the Accruent learner community. TechTalks are delivered virtually by our expert Product Trainers and typically last 45 minutes to an hour. Each TechTalk is recorded and made available in Accruent Academy for reference, to those who attend.

CUSTOM BUILT

Lucernex Custom Training

We can provide training tailored to your environment, built from a collaboration between our training team 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 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 and MicroLearnings 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 multiple languages.

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 your organization and develop a Training Plan to meet those requirements.

Training Needs Analysis 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
- Part 3 – 1 remote session of 1 hour to review the plan and follow-up steps

- Part 4 – Signoff and planning

ON DEMAND

Training On-site

Lucernex Instructor Led Classroom Training – Standard or Customized

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 configuration. Accruent makes this easier by allowing you to train users at your location, or remotely 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. Reach out to the Accruent Academy Team (Training@accruent.com) for more options.



Please contact the Accruent Academy at Training@accruent.com 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.