



Accruent Academy – Maintenance Connection

Customer Training Catalog

May, 2019

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ABOUT THIS CATALOG

The Accruent Academy believes that helping users to understand the software's capabilities is the key to your success.

We provide robust training programs for Maintenance Connection customers to increase customer confidence in the product and accelerate user adoption to grow an organization's return on investment. The Accruent Academy trains users throughout an organization—from system administrators who need to become in-house experts with the technical knowledge to manage and maintain their solution, to end users who will utilize Maintenance Connection solutions for their daily tasks.

Our training is delivered through the [Accruent Academy Learning Center](#), providing users easy access. Attendees of our eLearning training courses can register and connect anytime, anywhere. Courses are updated each quarter to ensure users are up-to date with the latest features and functions.

eLearning

As our software has evolved to meet our customers' needs, so too has our approach to training. That is why we are making our training programs as accessible as we can through eLearning.



All online curriculums contain interactive eLearning modules with learning content, simulated exercises and knowledge checks to ensure content is learned. Throughout the courses, you can monitor and track the growing performance. All courses are update on a quarterly basis to ensure you are up to speed with the latest functions and features.

With the help of Accruent Academy, users are educated and ready to use Maintenance Connection in limited time.

Whether you are new to Maintenance Connection software, in implementation or an experienced user, we have a training that will benefit you. This catalog contains all course details and learning paths to enable you to start learning when it suits your busy schedule.

We wish you happy Learning!

-Accruent Academy Team



REGISTRATION AND SUBSCRIPTION

Accruent’s online learning environment; the “Accruent Academy Learning Center” is web-based and accessed through a software-based portal. Attendees can register and connect from everywhere in the world at any point in time to discover your learning journey.

Accruent Academy’s Maintenance Connection Training Subscriptions grants access on a per person basis, to all product training courses of Maintenance Connection for a period of one year, for \$ 395.

Within the Accruent Academy Learning Center you will be guided to find training courses you need. When ready to start your training, you can purchase your subscription in the Learning Center, through credit card or invoice request. After payment you can attend all eLearning courses.

If you are a previous user of Maintenance Connection University, please connect with your account manager, or contact us via training@accruent.com for a migration offer.

[Login to Accruent Academy](#)

YOUR LEARNING PATH

To prepare new Maintenance Connection Users, the Accruent Academy provides comprehensive training paths to establish your core team. Each training path can be completed on its own, however the prerequisite training path is recommended prior to taking other courses. While some of the courses within a training path are sequential, a course can also be completed on its own to allow for busy schedules.

The table below provides suitable learning paths for each role. Within the next chapters, the training paths are defined in more detail to help you construct your specific learning path.

Learning Paths:	Technician	Asset Manager	Planner/Project Manager	Manager/Data Analyst	System Administrator
MC Fundamentals	Required	Required	Required	Required	All required
MC Assets and Infrastructure	Required (based on role)	Required	Recommended		
MC Work Management	Required (based on role)	Recommended	Required		
MC Parts and Purchasing	Required (based on role)	Recommended	Recommended		
MC Reporting		Required	Required	Required	
MC Preventive Maintenance and Project Management			Required		
MC Express Courses	Required (based on role)	Required	Required		
MC Best Practices		Recommended	Recommended	Recommended	
MC System Administrator					

END USER TRAINING COURSES PER LEARNING PATH

MC Fundamentals Training Course

Learn the foundation and the fundamentals of Maintenance Connection with this course that covers the basics of the system. Get an overview of basic system usage including navigation, system layout, applications and modules.

Training Path Details



Delivery Type: eLearning

Courses: 1

Duration: 0.5 hour

Targeted Audience: All users of Maintenance Connection

Registration: [Accruent Academy Learning Center](#)

Training Outline

MC01 Maintenance Connection 101

Learn the foundation and the fundamentals of Maintenance Connection with this course that covers the basics of the system. Get an overview of basic system usage including navigation, system layout, applications and modules.

MC Assets and Infrastructure Training Course

Learn all aspects of the asset module of Maintenance Connection. From a thorough understanding of setting up the asset hierarchy, adding asset details and specifications, managing Asset status changes throughout their lifecycle in the various stages, to using configuring tools.

Training Path Details



Delivery Type: eLearning

Courses:

Duration:

Targeted Audience:

Registration: [Accruent Academy Learning Center](#)

Training Outline

A01 *Defining the Asset Hierarchy and Structure*

Learn the basics of the asset module of MC including setting up the asset hierarchy, defining structure, and best practices for naming conventions.

A02 *Overview of Asset Details and Tabs*

This session covers the importance of using asset details, including how to add images, use tabs and sub tabs effectively, and include attachments.

A03 *Managing Assets Using Classifications*

Review best practices for asset classifications including hierarchies, creation methods and simple update processes.

A04 *Asset Best Practices and Configuration Tools*

Learn the basics for various copy and paste methods, review the four asset configuration tools in MC and see the benefits of asset preferences.

A05 *Managing Asset Lifecycles*

This session covers asset status changes throughout their lifecycle and gives users examples of the various stages, including out-of-service, downtime, movement tracking and work order history.

A06 *Overview of Asset Specifications*

Explore the various ways to create asset specifications. Learn how to standardize and track all types of asset data including work order/asset relationships and reporting.

A07 *Best Practices for Asset Reporting*

Learn how asset data and setup affects reporting and see various reporting examples. Become a pro at asset reporting!

A08 *Using Asset Meters and User-Defined Fields*

This session will show you how to define the type of unit that should be associated with each meter. Learn how these readings will affect dependent/child records, and track meter history.

A09 *Exploring the Power of the New MC GIS Connector*

See how the New MC GIS connector can help public works and utilities companies manage their assets and infrastructure using the built-in integrated web-based GIS Viewer/Manager.

A10 *Asset Management and Security for Healthcare*

This session will show the various ways that security and data restrictions are integrated into Maintenance Connection to ensure that healthcare industry standards are met.

MC Work Management Training Course

Learn all aspects of the Work Order Management functions in Maintenance Connection from work order creation, view set-ups, assignments and the routing of work orders, to work order configuration, and time and cost tracking on work orders.

Training Path Details



Delivery Type: eLearning

Courses: 10

Duration:

Targeted Audience:

Registration: [Accruent Academy Learning Center](#)

Training Outline

W01 Basics of Work Order Management

Learn the basics of work orders including the different work order types and the components that are included like details, tabs and status changes.

W02 Overview of Work Order Creation

Explore the various ways to create work orders and send them via email to quickly generate them in the field.

W03 Service Requester Configuration

This session will provide an overview of the Service Requester Configuration Tool along with an in-depth look at each of the four configuration tabs.

W04 Creating Work Order Assignments

Learn how to assign work orders and manage assignments using various methods, including tabs view and calendar view.

W05 Work Order Routing

This session shows a typical work order process—including routing methods—that demonstrate various ways to track work orders.

W06 Standard / Enhanced Complete Close Setup

This session will provide overviews and examples of the complete/close functionality of work orders, including configuration of the standard/enhanced complete/close screen.

W07 Tracking Time and Costs on Work Orders

Learn how to incorporate labor and materials into work orders including estimates and actuals, tools, and other costs and tools.

W08 Rules Manager: Notifications and Alerts

This session explores the functionality of the Rules Manager and provides an overview of how to create and utilize notifications such as alerts, emails and texts.

W09 Work Order Management Tools

Learn how to make the most of work order management tools with this in-depth look at the actions available to interact with work orders such as controls/filters, labor calendars and status history. The Work Order Explorer and Work Order Matrix will also be discussed.

W10 Work Order Preferences

This session covers basic work order preferences and takes a closer look at the complete/close and Enhanced Complete Close preferences. Work order printout preferences and explorer/custom filter preferences will also be discussed.

MC Parts and Purchasing Training Course

Learn all aspects of the Parts and Purchasing functions in Maintenance Connection from part list configuration, to using the stockrooms and inventory management tools. In this course, we will also explain how to manage vendors to enable automatic ordering and purchase order creation. You will be provided with a thorough overview on managing purchase orders, including creation, approvals, receiving and invoicing, as well as configuring your inventory and purchase preference to make tasks easier and faster.

Training Path Details



Delivery Type: eLearning

Courses: 7

Duration:

Targeted Audience:

Registration: [Accruent Academy Learning Center](#)

Training Outline

P01 Master Parts List Configuration

Learn best practices for configuring the Inventory Module, including categories, naming conventions, vendors and cost rules.

P02 Managing Parts Using Stockrooms

This session will cover inventory configuration for stock rooms, including an overview of pricing, rotating parts, and Direct Issue vs. Stocked Inventory.

P03 Inventory Management Tools

Discuss how inventory associates with work orders and get hands on practice adjusting, counting and transferring inventory.

P04 Vendor Management

This session takes a look at vendor management and shows ways to properly set up vendors to enable automatic ordering and purchase order creation.

P05 Purchase Order Creation and Approval

This session covers best practices for purchase order creation, including manual and auto-generated options.

P06 Purchase Order Receiving and Invoicing

Gain a better understanding of how Maintenance Connection handles the receiving and invoicing process in the Purchase Order Module. Learn about RMAs and various other PO-related processes.

P07 Inventory and Purchasing Preferences

Many preferences exist for configuring and managing the PO screens and records. Gain a better understanding about unique configuration options to help optimize your application.

MC Reporting Training Course

Learn all aspects of the reporting functions in Maintenance Connection from understanding basic reporting functions like data building blocks and defining your criteria and desired data output, to the more advanced configuration of reports by connecting data relationships. You will also learn how to interpret data by equipping users with the knowledge to use pivot reports and set up emails containing configured reports for automatic distribution.

Training Path Details



Delivery Type: eLearning

Courses: 11

Duration:

Targeted Audience:

Registration: [Accruent Academy Learning Center](#)

Training Outline

R01 Basics of Reporting: Overview - Part 1

This session will discuss the different types of reports available, the basic building blocks of a report and their locations.

R02 Basics of Reporting: Overview - Part 2

Learn different methods for running reports and best practices for defining report criteria to receive desired results.

R03 Basics of Reporting: Report Setup - Part 1

This session will cover two steps in report setup: selecting the proper field list, and sorting and grouping your results.

R04 Basics of Reporting: Report Setup – Part 2

Learn the basics of chart creation and see tips and tricks available for reporting that you may not know.

R05 Intermediate Reporting: Report Configuration

This intermediate reporting session will discuss best practices for configuring reports, including data relationships and report criteria.

R06 Intermediate Reporting: Conditional Formatting

Learn how to create visual identifiers for your data and apply special formats to reports with conditional formatting.

R07 Intermediate Reporting: Smart Reports

Smart Reports are an extremely powerful feature of Maintenance Connection. Learn how to use smart reports with smart actions and criteria to create very efficient business processes.

R08 Intermediate Reporting: Email, Schedule and Export

This session will demonstrate how to share reports with others by covering options like frequency and formatting to ensure optimal end user results.

R09 Advanced Reporting: Custom Expressions and Criteria

Gain hands-on experience running advanced reports with commonly used custom expressions and see how fixed criteria can be used to place limitations on reports.

R10 Advanced Reporting: Report Setup and Summary Reports

This session will highlight two advanced reporting options: smart actions and custom group headers. Gain advanced reporting knowledge of summary reports which can be used to display aggregations of data such as sums, averages and counts.

R11 Pivot Reports

This session will show why pivot reports are effective to show data using two dimensions. Learn how to properly configure pivot reports and define fields to include the correct type of data..

MC Preventive Maintenance and Project Management Training Course

Learn all aspects of preventive maintenance and project management functions in Maintenance Connection from understanding the basic principles, to setting up both basic and complex procedures in MC. Once mastered, you will learn how to set up asset and preventive maintenance schedules, and how to use template for PM's. You will also learn about the related project management features to set up project plans, and how to monitor and track progress.

Training Path Details



Delivery Type: eLearning

Courses: 8

Duration:

Targeted Audience:

Registration: [Accruent Academy Learning Center](#)

Training Outline

PPP01 Overview of Preventive Maintenance

This session provides a basic overview of preventive maintenance by exploring the effects different tabs have on records and looking at general PM preferences.

PPP02 Basic Preventive Maintenance Procedures

Learn how to create simple procedures when generating preventive maintenance records. This session explores the basic tabs within the record.

PPP03 Complex Preventive Maintenance Procedures

Gain knowledge of more complex procedures in preventive maintenance records, like cloning, linking assets and adding images.

PPP04 Setting up Assets and Preventive Maintenance Schedules

This session takes a look at how the assets tab functions, and the fields and columns that can be selected when adding assets to a schedule.

PPP05 Creating Preventive Maintenance Schedules

Learn how to create preventive maintenance schedules and see examples of PMs with different procedure intervals, linking procedure tasks and automation.

PPP06 PM Generation Methods and Work Order Projections

See an overview of the differences between automatic and manual generation of preventive maintenance schedules and preview the Work Order Projections feature.

PPP07 Projects and Project Plans

This session discusses the ways that projects and project plans can be utilized by providing examples of how to generate a project plan.

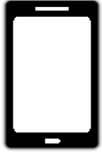
PPP08 PM Optimization and Efficiency

Learn how to optimize your PM Management with Maintenance Connection tools available to you like the PM Auditing and Consistency Toolkit, as well as the PM Completion Dashboard Suite.

MC Express Courses Training Course

Learn all aspects of Express, our mobile product module in Maintenance Connection, from Asset Management, to Work Order and Part Management, as well as System Administration of Express.

Training Path Details



Delivery Type: eLearning

Courses: 5

Duration:

Targeted Audience:

Registration: [Accruent Academy Learning Center](#)

Training Outline

EX01 Overview of MC Express

Learn the basic navigation of our mobile product MC Express and gain knowledge on how to filter lists and records, set permission rights and access for technicians, and set preferences for an intuitive interface.

EX02 Asset Management Through MC Express

This course will cover how to create and edit asset records in MC Express, navigate the Asset Hierarchy and List, the different asset pages, and unique asset features.

EX03 Work Order Management Through MC Express

This course will teach you how to create and edit work order records in MC express, navigate the work order lists and filtering options, and operate the different work order pages and features.

EX04 Parts Management Through MC Express

This course will cover how to create and edit part records in MC Express, navigate the part lists and filtering options, and view the different part pages and unique features.

EX05 System Administration Through MC Express

If you are a System Administrator for MC, it is important to know how to properly setup MC Express. Learn about the general user interface and device support for MC Express, as well as how to set up rights, restrictions and member access. You will also learn how to configure preferences for an optimum user interface.

MC Best Practices Training Course

Learn all our recommended best practices of Maintenance Connection from more extensive reporting and the usage of SQL database, to getting deeper insights into the Rules Manager, KPIs, Reports, the Database Job Scheduler and common SQL statements. You will also learn about work order and project management best practices, including the 7 methods for automation within different areas of MC.

Training Path Details



Delivery Type: eLearning

Courses: 5

Duration:

Targeted Audience:

Registration: [Accruent Academy Learning Center](#)

Training Outline

BP01 Best Practices for Reporting: 5 Examples

Learn five hands on examples of the best practices of reporting. This course will instruct you on creating days past due reports, projection reports, smart reports, summary reports and pivot reports.

BP02 Best Practices for SQL Scripting in MC

Learn the best practices, methods and areas to use SQL within Maintenance Connection. This course also includes instructions on using Rules Manager, KPIs, Reports, the Database Job Scheduler and examples of common SQL statements to use in MC.

BP03 Best Practices for PMs: 5 Examples

Learn five hands on examples of the best practices of PMs. In this course you will learn how to use attachments, create multi-asset PMs with multiple procedures and create a PM with follow-up PMs. You will also learn how create a Project Phase PM and manage PM schedules.

BP04 Best Practices for Work Order Management

Learn the best practices for managing work orders through advanced work order creation techniques, automatic assignments, streamlined data entry, various work order tools and more.

BP05 Best Practices for Automation

Learn seven hands-on examples of the best practices of automation within MC. This course will instruct you on how to use the Rules Manager to automate assignments and send out notifications. It also will teach you how to automate reports through email, auto-populate labor costs, automate PMs and use Smart Reports for updates.

SYSTEM ADMINISTRATOR TRAINING AND CERTIFICATION

MC System Administrator Training Course

This training course will facilitate management and configuration options to help set up and maintain Maintenance Connection for your organization. This training course is aimed at system administrators and/or application managers. Upon completion, access to our Self-Service Center is granted to create support cases in the portal. Cases will be handled by the Accruent Support department.

This training course must be completed by at least two system administrators or application managers.

Training Path Details



Delivery Type: eLearning

Courses: 8

Duration:

Targeted Audience:

Registration: [Accruent Academy Learning Center](#)

Coming Soon: Certification Exam in combination with the System Administrator Course

Training Outline

SA01 Document and File Management

This session discusses document and file management, including an overview of the documents module, attachment tabs and different document types.

SA02 User and Password Management Techniques

Learn about the different types of users in MC, how to create and approve them within the system and how use the Password Management Tool.

SA03 Overview of Access Groups

This session will define access groups, explain their relationship to member records and provide an overview of their functionality.

SA04 Managing KPIs and Dashboards

Explore Dashboard functionality and learn more about advanced features of key performance indicators like sharing and cloning.

SA05 Customizing the User Interface

This session discusses options available to certain administrators to customize the MC user interface—a process that can be useful to allow organizations the option to create interfaces to fit their business flow.

SA06 Human Resource Management

Learn about how to use Maintenance Connection to manage labor, training, hiring, reviews and other, general HR-related processes.

SA07 Rules Manager: Events and Notifications

Gain insights into the Rules Manager from a system administrator's perspective. Learn about database-level audit procedures and how to configure various complex automation rules.

SA08 MC v8.0 Overview and Release Notes

View the full MC v8.0 release notes.

**Maintenance Connection Software
Training**

May 2019

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