



CUSTOMER TRAINING



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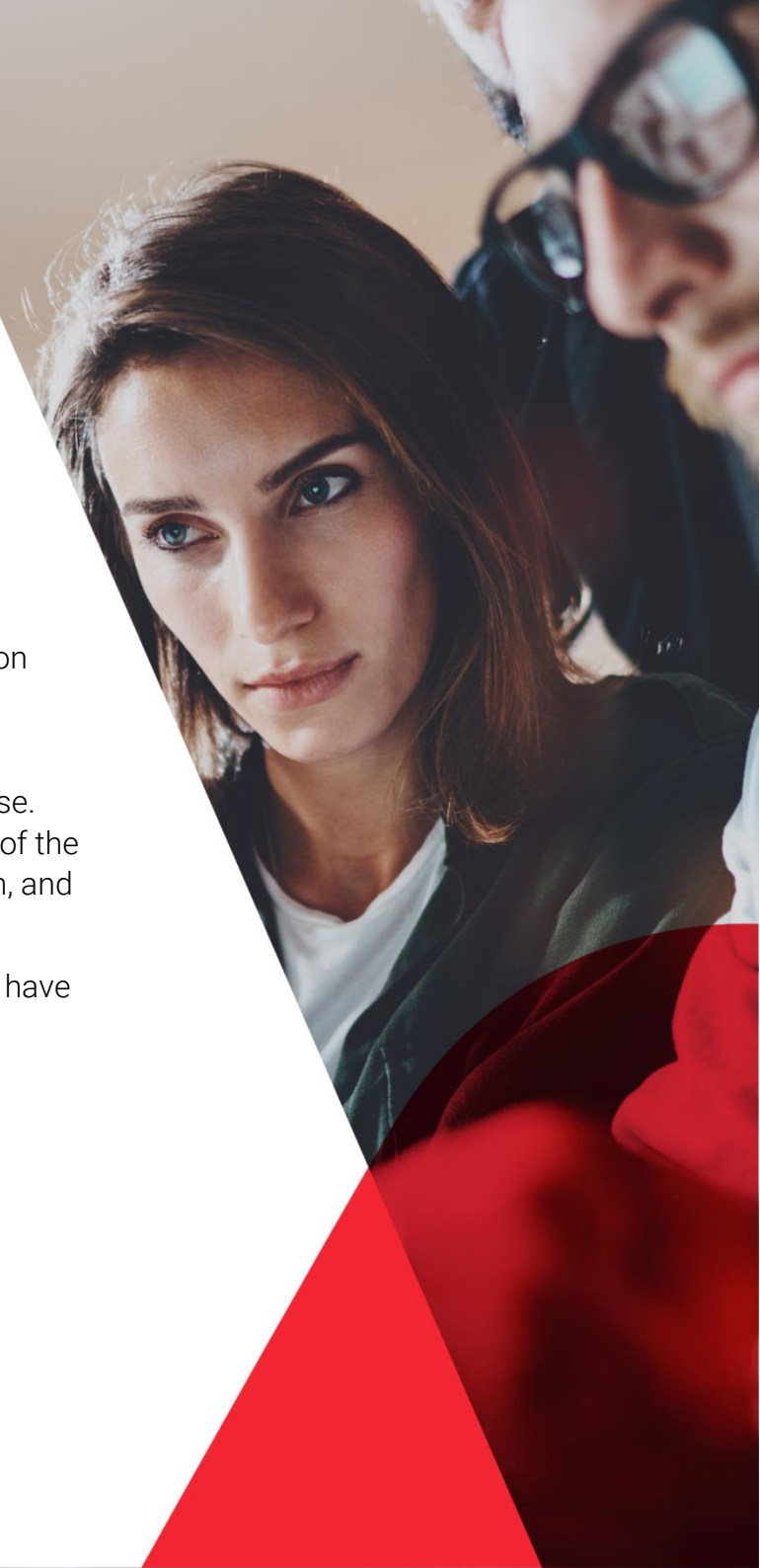
ABOUT TRAINING

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 EMS solution.

Accruent Academy delivers world-class training solutions standard with your EMS 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 EMS software, part of an implementation team, or an experienced user, we have continuous training that will benefit you and your organization.



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 EMS 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 customer's 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 EMS training courses included with your software contract. 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 various types of Expert Users using both EMS Workplace and EMS Campus, Technical Users using both EMS Workplace and EMS Campus, and Higher Education specific to EMS Campus products. More detailed information on all courses is provided in subsequent sections. Additional standard training users can be purchased as needed.

Course	Format	Role				
		System Admin	Reservationist	Service Provider	Technical User	Higher Education
Reservationist I	eLearning	R	R		O	R
Reservationist II	eLearning	R	R			R
Reservationist III	eLearning	R	R			R
Administering EMS: Configuration Basics	eLearning	R			O	R
How End Users Use EMS Web App	eLearning	R	R	O	O	R
How End Users Use EMS for Outlook	eLearning	O	O		O	O
How End Users Use EMS for Google	eLearning	O	O		O	O
Direct Spaces	eLearning	O	O		O	O
Administering Everyday User Applications	eLearning	R			O	R
Service Provider Operation	eLearning	O	O	R		O
Administering Services	eLearning	O		O		O
Using EMS for Invoicing	eLearning	O	O			O
Administering Pricing and Billing	eLearning	O				O
Global Settings and Permissions	eLearning	R				O
Publishing Maintaining Course Schedule	eLearning					R
Optimization of Course Schedule	eLearning					O
Campus Planning Interface	eLearning					O
Final Exam Scheduling	eLearning					O
Academic Administration	eLearning					R

R = Required course for base knowledge of EMS O = Optional course for additional EMS functionality

AVAILABLE ADD-ON TRAINING BY ROLE

Accruent Academy also offers these additional training courses for purchase via Accruent Academy or Statement of Work (SOW).

Course	Format	Role				
		System Admin	Reservationist	Service Provider	Technical User	Higher Ed
EMS Configuration Series	Virtual Instructor-Led	X				X
EMS Reservationist Series	Virtual Instructor-Led	X	X			X

TRAINING COURSE DESCRIPTIONS

RESERVATIONIST I

Length

3 hours

Training Type

eLearning modules

Course Overview

The EMS Reservationist I course will guide EMS Admin users through the most popular tools in the Desktop Client for making simple reservations, searching for reservations, and running common reports. It includes a short overview to review the main functions of the reservationist role in EMS. The training explains the components of each module and demonstrates their uses.

Course Objectives

- Compare the different ways to create a simple reservation using tools such as the Book and Reservation Wizard
- Explain the various ways to search for existing reservations
- Use visitor management tools to add, check-in and view visitors
- Explain basic editing tools and methods for basic changes to bookings in the Desktop Client

Key Tasks: Interpreting the most popular tools in EMS for making and editing simple reservations, explaining how to search for existing reservations, complete visitor management tasks, run basic operational reports

Course Topics

- EMS reservationist function overview
- Navigating the Book and Reservation Wizard to make simple reservations
- Browsing Reservation Information: Browser, Calendar, Groups
- Edit basic reservation and booking details
- Visitor management
- Run common reports

Course Audience

- Expert User – System Admin
- Expert User – Reservationist
- Technical User

RESERVATIONIST II

Length

2 Hours

Training Type

eLearning modules

Course overview

The EMS Reservationist II training offers more in-depth training on various tools in EMS for making and managing complex reservations. This course is designed for admins who are responsible for approving everyday user reservation requests, adding and managing services, editing existing reservations, and using advanced search tools to find future and previous reservation data.

Course objectives

- Use the Dashboard and Navigator to approve incoming reservations from the Web App
- Identify the various tools for editing single bookings, multiple bookings, and reservation details
- Add and edit service orders on bookings
- Explain how to use advanced search functions to find current and previous reservation data
- Understand the different types of reports available in EMS and best practices for running and saving report formats
- Describe how to use the Query Builder to create custom reports

Key Tasks: Approve single and recurring reservation requests from Everyday Users, add and edit service orders, use the Browser and Calendar to run advanced searches, navigate through the EMS reporting hierarchy to pull various reports, and learn how to create custom reports with the Query Builder

Course Topics

- Approve reservation requests
- Edit reservation and booking details
- Add services
- Use advanced search functions
- Run additional reports and create custom reports

Course Audience

- Expert User – System Admin
- Expert User – Reservationist

RESERVATIONIST III

Length

1.5 Hours

Training Type

eLearning modules

Course overview

The EMS Reservationist III training is a deep dive for EMS admin users to have a better understanding of the various workflow tools for event planners in EMS. This is an advanced course intended for users that are familiar with the software and actively need to make complex reservations, make many edits to reservations, manage communications to end users, and run operational reports.

Course objectives

- Demonstrate how to send confirmation reports and contracts for reservations and bookings, including effective use of Messages, User Defined Fields, Attachments, and Agenda categories
- Compare various workflow tools to assist event planners such as Reminders, Comments, and Group browser options
- Describe the various features of the Dashboard and its use
- Feel confident creating operational reports and create automated reports

Key Tasks: Manage complex reservations using workflow tools, Modify and send confirmation reports and contracts, manage Group reservations, use the Dashboard functions, run and automate operational reports.

Course Topics

- Overview of Event Planner role
- Create complex reservations
- Using messages
- Utilizing comments and reminders
- Utilizing User Defined Fields
- Configure and send confirmation reports
- Use advanced group browser functions
- Configure and use the Dashboard
- Automate reports

Course Audience

- Expert User – System Admin
- Expert User – Reservationist

ADMINISTERING EMS: CONFIGURATION BASICS

Length

2 Hours

Training Type

eLearning modules

Course Overview

The Administering EMS: Configuration Basics course will provide an EMS Admin with a toolbox of configuration knowledge to create and edit buildings, rooms, notifications, everyday user application settings, and more. This course is designed for system admin users who have full access to modify and create new configuration settings in EMS.

Course Objectives

- Employ best practices for room properties settings for different types of space in EMS
- Feel confident creating and editing buildings and rooms with corresponding room properties
- Configure notification rules, user-defined fields, and other workflow settings for various types of users in EMS
- Manage everyday user application settings and permissions for your EMS environment

Key Tasks: Configure Facilities data, configure notification rules, configure user-defined fields, configure pricing for rooms and services, configure everyday user applications, utilize configuration data to run and save reports for administrative use

Course Topics

- Configuring Facilities
- Configure Pricing
- Configure Building, Room and Reservation UDF's
- Configure Notifications
- Group Notification Rules
- Configuring Everyday User Process Templates and User Security
- Automated Reports

Course Audience

- Expert User – System Admin

SERVICE PROVIDER OPERATIONS

Length

1.5 hours

Training Type

eLearning modules

Course Overview

The Service Provider Operation course is designed to give service providers a toolbox to add, edit, cancel, and manage all phases of service order requests. This course reviews how to manage resource requests in both EMS Everyday User applications and the Desktop client, including basic reporting for service providers.

Course Objectives

- Show how to add, edit and cancel service requests in EMS Web App and EMS for Outlook
- Demonstrate how to add, edit and cancel services to single and multi-booking reservations in the Desktop Client
- Use the Manage Services tool to find, approve and review service requests
- Outline and describe the most popular reports in EMS for service provider daily operations and analysis

Key Tasks: Add, Edit and Cancel service requests in Everyday User Applications and the Desktop Client, Utilize Manage Services Tool, Run reporting to assist in daily operations and to analyze operations

Course Topics

- Define a service provider
- Add, edit, and cancel service requests in everyday user applications
- Add, edit, and cancel services in the Desktop Client
- View service requests in the Manage Services tool
- Approve and change the state of service requests as an administrator
- Run Operational reports for Service Providers
- Analyze operations with Statistical Reports

Course Audience

- Expert User – System Admin
- Expert User – Service Provider

ADMINISTERING SERVICES

Length

2 hours

Training Type

eLearning modules

Course Overview

The Administering Services training course will give an overview of various configuration elements in EMS to support a variety of service orders and requests. This course will review the basics of Category and Resource configuration, as well as review operational tools such as notifications and automated reports to support service provider operations.

Course Objectives

- Identify the best Category type and options for configuring new services
- Demonstrate the ability to configure individual resources with features such as inventory, excluded rooms, everyday user settings, selections, and groupings.
- Configure Services Notification Rules to help manage service workflows
- Configure Group Notification Rules to help streamline services information with EMS end users
- Run and Automate services reports
- Configure desktop client user security templates and explain how to assign permissions to admin users in EMS

Key Tasks: Configure categories and resources, configure services settings for Everyday Users, configure notifications and automated reports for service providers

Course Topics

- Configure Categories
- Configure Resources
- Configure Service User Defined Fields
- Configure Notifications
- Configure Group Notifications
- Configure Everyday User Process Templates with Services
- Configure User Security for Service Providers
- Automated Reports

Course Audience

- Expert User – System Admin
- Expert User – Service Provider

ADMINISTERING EVERYDAY USER APPLICATIONS

Length

45 minutes

Training Type

eLearning modules

Course Overview

This training course will walk through the two most important parts of managing the Everyday User experience in EMS - Security Templates and Process Templates. This course will review how to manage what menu options everyday users see in the Web App and EMS for Outlook, as well as review how to configure process templates to help apply various business rules for your spaces in EMS.

Course Objectives

- Define the purpose of Security and Process Templates and explain how they are assigned to users
- Explain the various roles in Security Templates that you can make available to Everyday Users to increase visibility into your spaces
- Show how to create and edit Process Templates for self-serve and managed space for Everyday Users
- Explain the role of all tabs in Process Template configuration, including booking rules, defaults, parameters and status options.

Key Tasks: Create/Edit process templates, Create/edit security templates, assign process templates and security templates to users

Course Topics

- Security Template Tab
 - Roles Tab
 - Set Booking Details Display Fields
 - Delegation
 - Assign security templates to Everyday Users
 - Other tabs
- Process Template tab
 - Booking Rules tab
 - Rooms tab
 - Categories tab
 - Parameters tab
 - Other tabs

Course Audience

Expert User – System Admin

HOW END USERS USE EMS FOR GOOGLE

Length

25 minutes

Training Type

eLearning modules

Course Overview

This training course will review the functionality of the EMS for Google Calendar integration. This course is designed for Expert users to understand how Everyday Users can use EMS for Google to book rooms directly from their Google Calendar. The training will explain important considerations for admin users managing bookings in EMS that originate from EMS for Google Calendar.

Course Objectives

- Show how to create single and recurring bookings using EMS for Google Calendar to add a room to existing Gcal appointments
- Explain the various ways users can edit and cancel reservations made with EMS for Google
- Describe the limitations and considerations Desktop Client users should have when editing bookings that originated in EMS for Google

Key Tasks: Create a booking using EMS for Google Calendar, edit bookings made in EMS for Google Calendar, Review considerations for EMS for Google Calendar

Course Topics

- Introduction to EMS for Google Calendar
- Creating Single and Recurring Bookings
- Editing and/or Canceling Bookings
- User Preferences
- Managing Gsuite Bookings in the DTC

Course Audience

- Expert User – System Admin
- Expert User – Reservationist
- Technical User

HOW END USERS USE EMS FOR OUTLOOK

Length

25 minutes

Training Type

eLearning modules

Course Overview

This training course will show you how end users will use EMS for Outlook to reserve and edit rooms and services within the EMS for Outlook add-in. This course will also review considerations for Desktop Client users who manage Outlook bookings made by end-users.

Course Objectives

- Explain how end users can use the EMS for Outlook add-in to simply add rooms and services to existing Outlook appointments
- Identify the best practices for end-users who use EMS for Outlook to book video conferences, services, single and recurring meetings
- Show how to use optional features in the EMS for Outlook add-in such as delegation, filtering, and user defaults
- Describe considerations for editing bookings in the desktop client that originated from EMS for Outlook

Key Tasks: Create, edit, and cancel EMS room bookings in Outlook, use services in EMS for Outlook, manage EMS for Outlook appointments

Course Topics

- Intro to EMS for Outlook
- Create a Simple Outlook Appointment and Reserve a Room
- Create a Recurring Meeting without Services
- Create a Recurring Appointment with Services
- Creating a Video Conference Appointment
- Editing Reservation Details, Bookings, and/or Services
- Canceling Outlook Events with Room Bookings
- Delegation and EMS for Outlook
- User Defaults
- Managing EMS for Outlook Bookings in the Desktop Client

Course Audience

- Expert User – System Admin
- Expert User – Reservationist
- Technical User

DIRECT SPACES

Length

50 minutes

Training Type

eLearning modules

Course Overview

This training course will review the key setup and configuration components to use the EMS Direct Spaces mobile application. This course will show how users can use Direct spaces to book a room, edit reservations, and highlight the main features of the application.

Course Objectives

- Describe the current workflows that Direct Spaces is used to support.
- Describe how to access and log in to the EMS Direct Spaces app.
- Demonstrate how to create, modify and cancel a reservation from Direct Spaces.
- Demonstrate how to extend a booking, end a booking early, and check-in for a current booking.
- Demonstrate how to use Browse functions, delegation, QR codes and floorplan options in Direct Spaces.

Key Tasks: Install and log in to Direct Spaces, Create/edit/cancel EMS room bookings in Direct Spaces, use browse features, delegation, QR codes, floorplan and personalization options in Direct Spaces

Course Topics

- Intro to Direct Spaces
- Installation and Configuration
- Personalization options
- Create a Reservation
- Modify a booking
- Edit a reservation
- Browse People and Locations
- Additional Features: Delegation, QR codes and Floorplans

Course Audience

- Expert User – System Admin
- Expert User – Reservationist
- Technical User
- Higher Education

HOW END USERS USE FOR EMS WEB APP

Length

25 Minutes

Training Type

eLearning modules

Course Overview

This training course will show you how end users will use the EMS Web App to create and edit room reservations and service requests. This course will also explore how EMS for Web App reservations interact with EMS for Outlook and/or EMS for Google and will review how users can use additional Web App features to see room and event availability in EMS.

Course Objectives

- Explain how end users can use the EMS Web App to create, edit and cancel single and recurring room reservations
- Show how end users can request, edit, and cancel services in the Web App
- Show how to use optional features in the EMS Web App such as browse features, delegation, and user preferences
- Describe considerations for editing bookings in the desktop client that originated from the EMS Web App

Key Tasks: Create single and multi-booking reservations in the Web App, edit reservations, add/edit services, identify Browse features in the Web App

Course Topics

- Intro to the EMS Web App
- Create a Simple Reservation
- Create a Recurring Booking with Exchange/Google and services
- Create a Video Conference Reservation
- Editing/Canceling Reservations, Bookings and Services
- User Preferences
- Browse Features within the Web App
- Managing Web App Bookings in the Desktop Client

Course Audience

- Expert User – System Admin
- Expert User – Reservationist

GLOBAL SETTINGS AND PERMISSIONS

Length

1 Hour

Training Type

eLearning modules

Course Overview

This training course will provide System Administrators of EMS with a knowledge base of various data and user maintenance tools and an overview of how to edit and set key global settings in EMS. This course is designed for System Administrators of EMS who have full Administrator access.

Course Objectives

- Explain how to manage Desktop Client accounts and settings with User Templates
- Identify the Key Parameter settings in EMS and show how to edit Parameter Settings
- Show how to use all tools under the Tools menu in the System Administration Menu to edit reservation, workflow, and data maintenance options in EMS
- Show where to find global email settings and view Registration information.

Key Tasks: Edit key system parameters, create Expert User accounts and user templates, show how to use System Administration tools

Course Topics

- Expert User Permissions and Templates
- System Parameters
- Reservation and Workflow Administrative Tools
- Data Maintenance Administrative Tools

Course Audience

- Expert User – System Admin

ADMINISTERING PRICING AND BILLING

Length

1 hour

Training Type

eLearning modules

Course Overview

This course will show how to configure the EMS Billing and Pricing Module which tracks revenue sales for Rooms, Resources, and specific sales groups or departments. Learn how to create pricing plans and rate schedules that allow you to charge and track revenue for rooms and resources in EMS. This course will also walk through all other necessary configuration that is needed to create invoices and track revenue in EMS.

Course Objectives

- Complete necessary billing configuration in EMS to capture individual transactions for rooms, resources, and specific sales groups or departments.
- Complete necessary billing configuration in EMS to generate invoices directly from the system by creating Rate Schedules and Pricing Plans.
- Describe all optional billing configuration elements in EMS to determine which billing elements are needed in your organization.

Key Tasks: Configure Pricing plans and Rate Schedules, Configure calculations, revenue accounts, Billing reference numbers, key billing parameters

Course Topics

- Configure Rate Schedules and Pricing Plans
- Billing Configuration

Course Audience

- EMS System Administrators, Expert User Higher Ed

USING EMS FOR INVOICING

Length

45 minutes

Training Type

eLearning modules

Course Overview

This course will walk you through the entire invoicing cycle in EMS. Learn how to create a reservation with pricing, apply pre-payments and deposits, generate invoices, apply payments after invoicing, and key reports to help manage invoicing and billing in EMS.

Course Objectives

- Create a reservation with costs and edit pricing information on a reservation.
- Show how to apply deposits and pre-payments to a reservation with costs prior to invoicing.
- Show how to preview, generate, and finalize invoices on single reservations and for multiple reservations in batch invoicing.
- Show how to apply post-invoice payments and adjustments.
- Describe the key tools and reports in EMS that are used to help manage the invoicing lifecycle.

Key Tasks: Add pricing details to a reservation, generate invoices, track pre-invoice and post-invoice payments on a reservation with billing, generate billing reports

Course Topics

- Creating Reservations with pricing
- Applying deposits and pre-payments
- Invoicing
- Post invoice transactions and reporting

Course Audience

- EMS System Administrators, Reservationists

PUBLISHING AND MAINTAINING THE COURSE SCHEDULE

Length

1 hour

Training Type

eLearning Modules

Course Overview

This training course will show how to Publish a term in EMS from an integrated SIS in a publish-only workflow. This course will first show how to synchronize course data from the SIS and publish a term in EMS. After publishing, this course will also show how to find and edit course data with various academic tools in EMS. Various options for synchronizing course changes from the SIS or EMS will also be reviewed.

Course Objectives

- Explain how to Synchronize course data from the SIS to EMS, and how to publish course data into EMS as reservations and bookings.
- Show how to process various course changes in a post-published EMS term such as cancelled, new, and changed courses.
- Identify the various academic tools such as the Academic Book, Reservation Book, and Search for Rooms tool to help maintain course data.

Key Tasks: Create and Synchronize a term, publish a term, process post-publish changes to a term, and use academic tools in EMS to search for course data

Course Topics

- Creating and Synchronizing Terms
- Publishing a Term
- Processing SIS Changes
- Additional Academic Planning Tools

Course Audience

- Expert User – Higher Education

OPTIMIZATION OF THE COURSE SCHEDULE

Length

1 hour

Training Type

eLearning Modules

Course Overview

Learn how to use optimization to assign rooms to courses based on preferences and availability for an academic term. The optimization workflow allows EMS to build an optimal room schedule for a term by assigning rooms in EMS rather than in the SIS. This course will review how to set preferences, run optimization scenarios, publishing the most favorable scenario, and how to resolve any course conflicts post-publish.

Course Objectives

- Show how to create and synchronize a term in EMS to prepare for preferences
- Explain what types of preferences can be set for courses and demonstrate how to apply preferences
- Create and run an optimization scenario to find the best result for course assignment based on preferences
- Publish an optimized term in EMS

Key Tasks: Synchronize a term, set various preferences for courses, run optimization scenarios with various weights, assign rooms to unassigned courses, publish an optimized term in EMS

Course Topics

- Preparing for Set Preferences/Optimization
- Applying Preferences and Requirements
- Creating and Running an Optimization Scenario
- Resolve Room Assignments
- Publishing an Academic Term Utilizing Optimization

Course Audience

- Expert User – Higher Education

CAMPUS PLANNING INTERFACE

Length

30 minutes

Training Type

eLearning Modules

Course Overview

This training course will review the web-based Campus Planning Interface as a tool to set preferences for course optimization, review course schedule information, and communicate changes to the academic scheduling team. This course will review how to find course information, create/edit/cancel courses, and review important reports to help in academic scheduling.

Course Objectives

- Explain the function of the Campus Planning Interface as a tool to communicate course information and preferences to the academic scheduling team.
- Show how to submit schedule change requests, including new, changed, or canceled courses.
- Run reports that are helpful to view and filter academic course information.
- Show how to set preferences for single and multiple courses.

Key Tasks: Find courses using the Academic Browser and Course Navigator, collect new, changed, and canceled courses, set course preferences, run academic reports

Course Topics

- Defining the Campus Planning Interface
- Accessing the Campus Planning Interface
- Using the Campus Planning Interface to Support Define & Edit Mode
- Using CPI to Support Set Preferences Mode
- Post-Publish Options
- Additional Reports

Course Audience

- Expert User – Higher Education

FINAL EXAM SCHEDULING

Length

1 hour

Training Type

eLearning Modules

Course Overview

This course will review all steps of the Final Exam Scheduling process. This process is used to automate the assignment of a final exam booking for each course meeting pattern based on the published template that your organization uses. Learn how to use this scheduling process to make the exam date, time, and location very clear for each course.

Course Objectives

- Prepare for exams by creating a block-booking and ensuring that the template for the term has been configured.
- Address all exam requirements and exceptions such as courses that are meeting together for exams, courses that require a special room for an exam, courses that are having no exam, and so on.
- Publish the exam session and resolve any conflicts or exceptions.
- Run final exam reports that will assist you in analyzing the exam settings and communicating the final schedule.

Key Tasks: Create a Final Exam Template, Indicate Exam settings, Create and Publish an Exam session, Run Exam settings and schedule reports

Course Topics

- Overview of Final Exam Scheduling Process
- Preparing for Final Exams
- Publishing a Final Exam Session
- Running Final Exam Reports

Course Audience

- Expert User – Higher Education

ACADEMIC ADMINISTRATION

Length

1 hour

Training Type

eLearning Modules

Course Overview

Prior to pulling course data from an SIS into EMS to create reservations, various elements of configuration must be completed in EMS to correctly pull data from your SIS. This course will review the steps to properly synchronize information from your SIS and review configuration related to your Academic Planning module. This involves synching facility data, course subjects, instructors, event types, domains, terms and more between your SIS and EMS. This course will also review how to manage user permissions for various academic planning roles.

Course Objectives

- Show how to synchronize all facilities and campus data from the SIS to EMS.
- Show how to configure domains, academic units, and other necessary academic configurations to support the academic planning process.
- Create user templates and user permissions for various academic user types involved in the academic planning process.

Key Tasks: Synchronize facility and course information from the SIS, complete key academic EMS configuration, create user templates for academic admins of EMS

Course Topics

- Defining Academic Synchronization and Core Configuration
- Facility Data Synchronization
- Additional Academic Synchronization
- Configuring Domains and Academic Units
- Configuring Additional Academic Info
- User Account Management

Course Audience

- Expert User – System Admin

EMS ADD-ON TRAINING COURSES

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

EMS CONFIGURATION SERIES – INSTRUCTOR-LED

Length

9 Hours (6 1.5-hour sessions)

Training Type

Virtual Classroom up to 10 people

Course Overview

This series of instructor-led virtual sessions will walk you through the key configuration elements of EMS. This course is recommended for System Administrators of EMS who have configuration access and are looking to learn about various configuration settings in EMS that can help optimize your space and resource scheduling. These sessions will build upon each other, and it is recommended to take each session in order.

Course Objectives

- Configure Buildings and Rooms with necessary facilities information that users can use to easily search for and locate a room.
- Configure messages, special dates, notification rules, statuses, user-defined fields, and more workflow-oriented configuration items in EMS that help users monitor the lifecycle of a reservation.
- Configure categories and resources for any kind of service that can be added to a reservation within your organization to EMS.
- Configure Rate Schedules and Pricing Plans that enable your organization to charge for and track revenue for room costs and resource costs.
- Configure Everyday user Process Templates and security templates to get the most out of your everyday user applications, and configure other options in the web app that will help end-users navigate the web app.
- Identify key parameters in EMS that will help optimize the system for your organization and manage desktop client user permissions with templates.

Course Sessions

1. Facilities configuration

- Configure a building
- Configure a room
- Areas/Views
- Building Hours and Special Dates
- Room Types, setup types, features, and floors

2. Administration and other configuration

- Other Folder
 - Event types, group types
 - Reminder/comment types
 - Messages
 - User Defined Fields
 - Reservation Sources
 - Cancel Reasons
- Administration folder
 - Notification Rules
 - Statuses
 - Reservation Wizard Templates

3. Resource configuration

- Category configuration - Review all category types and options to use states
- Resource configuration - Review options for groupings, selections, inventory, and more

4. Pricing and billing

- Pricing plans
- Rate Schedules
- Other billing items: PO/billing numbers, calculations, accounts, and payment types

5. Everyday User applications

- Process Templates
- Security Templates
- Intents
- Help Text and personalization options in the web app

6. System Administration

- Key Parameters
- User Templates
- Create/edit a User
- Edit tools

Course Audience

- EMS System Administrators

EMS RESERVATIONIST SERIES – INSTRUCTOR-LED

Length

7.5 Hours (3 2.5-hour sessions)

Training Type

Virtual Classroom up to 10 people

Course Overview

This series of virtual instructor-led sessions will walk you through all steps to create, edit and manage reservations as a desktop client user in EMS. These courses build sequentially on each other and must be taken as a series. This course is recommended for new reservationists at your organization who are new to EMS, or for seasoned EMS users who want to ensure they are making and editing reservations in the most effective way possible.

Course Objectives

- Create a simple reservation in EMS using various tools, including the book, wizard, and groups tool.
- Create a recurring and complex reservation in EMS with services.
- Generate a confirmation report for a whole series or one single booking.
- Edit both single or multiple bookings details such as location, time, group information, and other bookings details.
- Add and edit services on a single booking or multiple bookings at once.
- Use the Dashboard to manage booking approvals, notification rules, and other alerts.
- Quickly find a booking in EMS with limited information using various search tools.
- Show how to run a report in EMS, and how to automate report delivery.

Course Sessions

1. Book a meeting

- Review the book
- Review the wizard
- Create a simple reservation
- Create a recurring reservation

2. Book complex meetings and edit meetings

- Book a meeting with services
- Detailed look at the navigator

- Change booking and reservation details for single and recurring meetings
- Generate a confirmation

3. The Dashboard and Search tools

- Dashboard overview
- Calendar and Browser
- Groups tool
- Run a report

Course Audience

- EMS System Administrators, Reservationists

ADDITIONAL PRODUCTS

ELEARNING FILES

EMS 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:

- Reservationist I
- Reservationist II
- Reservationist III
- Service Provider Operations
- How End Users use EMS for Google
- How End Users use EMS for Outlook
- How End Users use EMS for Web App

MICROLEARNINGS

Accruent Academy offers MicroLearnings as an economical option for semi-customized training. A MicroLearning is our standard bite-size learning content that focuses on a specific topic or task, approximately 5-10 minutes in duration. MicroLearnings include text, screenshots, 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.

CUSTOM BUILT

EMS 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 or classroom materials that can be reused for future training sessions.

EMS 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 to 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.

EMS Training Needs Analysis Workshop

An EMS 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.

ON-DEMAND

Training On-site

EMS Instructor-Led Classroom Training – Standard or Customized

Accruent Academy offers training that provides individual attention while you learn about the new system. Since the EMS 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 10. 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 EMS Training

Catalog Disclosure

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