



# 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 Maintenance Connection solution.

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

Whether you are new to Maintenance Connection 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

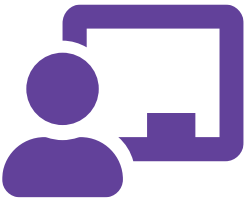
### ELEARNING



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.

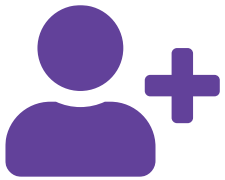
All online training courses contain interactive eLearning modules to learn about the software, simulated exercises for real-time application practice, and knowledge checks to ensure content comprehension. Training completion information can be viewed and exported through reporting, by the assigned training 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 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 Maintenance Connection 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. More detailed information on all courses is provided in subsequent sections.

Course	Format	Role				
		Supervisor	Technician	Purchasing Manager	Dispatch	System Admin
Fundamentals	eLearning	x	x	x	x	x
Assets & Infrastructure	eLearning	x	x		x	x
Work Order Management	eLearning	x	x		x	x
Preventive Maintenance & Project Management	eLearning	x				x
Parts and Purchasing	eLearning	x		x		x
MC Express	eLearning	x	x			x
Reporting	eLearning	x		x		x
End-User Certification Exam	Exam	x				x
System Administrator	eLearning					x
System Admin Certification Exam	Exam					x

Additionally, all users have access to the [Accruent Academy Video Library](#) which contains short instructional videos on many topics.

## AVAILABLE ADD-ON TRAINING BY ROLE

Accruent Academy 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	
		Maintenance Connection End User	Maintenance Connection System Admin
Maintenance Connection Standard Training*	Instructor-Led	x	x
Maintenance Connection Reporting Series	Instructor-Led	x	x

\* Also available in role-specific packages:

- System Administrator
- Product Lead/Supervisor
- Technician
- Purchasing Manager
- Dispatch

## MAINTENANCE CONNECTION STANDARD TRAINING COURSES – INCLUDED

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

### FUNDAMENTALS

#### Length

1 hour

#### Training Type

eLearning module

#### Course Overview

The Fundamentals Training Course will introduce you to the basics of Maintenance Connection. From logging in to navigation tools, this course will provide an overview of how to start using MC by discussing various applications, modules, pages, and records.

#### Course Objectives

- Identify how to log in and how to navigate to helpful resources.
- Navigate to different applications, modules, pages, and records.

**Key tasks:** Logging In, Basic Navigation, Accessing Resources

#### Course Topics

- Logging in Basics
- Home Page & User Interface
- Screen & Page Conventions
- Navigation Tools
- Accessing Resources

#### Course Audience

- System Administrators
- Site Administrators
- Maintenance Managers
- Maintenance Supervisors
- Technicians



## ASSETS AND INFRASTRUCTURE

### Length

1.5 hours

### Training Type

eLearning module

### Course Overview

The Assets and Infrastructure Training Course will introduce you to the purpose and identification of assets, various helpful functionalities about assets, and multiple areas within Maintenance Connection that deal with the settings and management of asset records.

### Course Objectives

- Navigate and use the Asset Hierarchy, Asset tabs and sections, and Asset association.
- Utilize various configurations and preferences to meet company needs.
- Create important Asset reports, meter readings, and UDFs.

**Key tasks:** Defining Asset Hierarchy Tree, Managing Specifications and Classifications, Understanding Asset Module.

### Course Topics

- Defining the Asset Hierarchy and Structure
- Overview of Asset Details and Tabs
- Managing Assets Using Classifications
- Configurations and Preferences
- Asset Reporting
- Managing Asset Life Cycles
- Overview of Asset Specifications
- Using Asset Meters and User Defined Fields

### Course Audience

- System Administrators
- Site Administrators
- Maintenance Managers
- Maintenance Supervisors

## WORK ORDER MANAGEMENT

### Length

2 hours

### Training Type

eLearning module

### Course Overview

The Work Order Management Training Course will introduce the purpose and functionality of work order pages, sections, fields, and creation methods. It will also go into detail on various notification options, preferences, and work order tools that can greatly benefit the management and process of your work orders within Maintenance Connection.

### Course Objectives

- Navigate the Work Order module tabs, sub-tabs, sections, and fields.
- Utilize various work order creation methods, management tools, and preferences.

**Key tasks:** Managing Tasks/Assignments/Time/Costs, Configuring the Service Requester, Understanding Work Orders Module, Setting up the Complete/Close Dialog.

### Course Topics

- Basics of Work Order Management
- Overview of Work Order Creation
- Work Order Tasks Management
- Work Order Assignments
- Work Order Routing
- Complete Close Dialog Setup
- Tracking Time and Costs on Work Orders
- Rules Manager Notifications and Alerts
- Service Requester Configuration
- Work Order Management Tools
- Work Order Preferences

### Course Audience

- System Administrators
- Site Administrators
- Maintenance Managers
- Maintenance Supervisors

## PARTS AND PURCHASING

### Length

1.5 hours

### Training Type

eLearning module

### Course Overview

The Parts and Purchasing Training Course will introduce all aspects of the Parts and Purchasing functions in Maintenance Connection. From part list configuration to using the stockrooms, to inventory management tools. This course 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, and configuring your inventory and purchase preference to make your tasks easier and faster. Routing of work orders, as well as mastering a thorough understanding of work order configuration, closing setups, and time and cost tracking on Work Orders.

### Course Objectives

- Define the components when configuring parts.
- Define the relationship between parts and stockrooms.
- Identify the various methods for generating purchase orders.

**Key tasks:** Managing Parts, Vendors, and Stock Rooms, Understanding Purchase Order Creation/Approval/Receiving/Invoicing, Understanding Inventory Tools and Preferences.

### Course Topics

- Master Parts List Configuration
- Managing Parts Using Stockrooms
- Inventory Management Tools
- Vendor Management
- Purchase Order Creation and Approval
- Purchase Order Receiving and Invoicing
- Inventory and Purchasing Preferences

### Course Audience

- System Administrators
- Site Administrators
- Maintenance Managers
- Maintenance Supervisors

## REPORTING

### Length

2 hours

### Training Type

eLearning module

### Course Overview

The Reporting Training Course is for Asset Managers, Project Managers, Data Analysts, and System Administrators. This training course will introduce users to essential reporting functions, like data building blocks and criteria, and the more advanced configuration setup of reports by connecting data relationships. Users will also learn how to interpret data by understanding pivot reports, and how to set up automatic emails containing your configured report for automatic distribution.

### Course Objectives

- Navigate and use the features for managing basic reports.
- Navigate and use the features for managing intermediate reports.
- Navigate and use the features for managing advanced reports.

**Key tasks:** Understanding Report Setup, Criteria, Custom Expressions, and Conditional Formatting, Understanding Pivot and Smart Reports

### Course Topics

- Basics of Reporting: Overview
- Basics of Reporting: Report Setup
- Intermediate Reporting: Report Configuration
- Intermediate Reporting: Conditional Formatting
- Intermediate Reporting: Smart Reports
- Intermediate Reporting: Email, Schedule, and Export
- Advanced Reporting: Custom Expressions and Criteria
- Advanced Reporting: Report Setup and Summary Reports
- Pivot Reports

### Course Audience

- System Administrators
- Site Administrators
- Maintenance Managers

## PREVENTIVE MAINTENANCE AND PROJECT MANAGEMENT

### Length

2 hours

### Training Type

eLearning module

### Course Overview

The Preventive Maintenance and Project Management Training Course will introduce all aspects of Preventive Maintenance and Project Management functions in Maintenance Connection. From understanding the basic principles, to setting up primary and complex procedures, the setup of asset and preventive maintenance schedules, and how to use those templates for PMs. You will also learn about the related project management features to set up your project plans, and how you can monitor and track progress.

### Course Objectives

- Create and manage procedures and preventive maintenance records.
- Utilize the features and tabs associated with preventive maintenance and project records.

**Key tasks:** Able to set up Simple & Complex Procedures, Creating and managing PM Schedules and Projects.

### Course Topics

- Overview of Preventive Maintenance
- Basic Preventive Maintenance Procedures
- Complex Preventive Maintenance Procedures
- Setting up Assets and PM Schedules
- Creating Preventive Maintenance Schedules
- PM Generation Methods and WO Projections
- Projects and Project Plans

### Course Audience

- System Administrators
- Site Administrators
- Maintenance Managers
- Maintenance Supervisors

## MC EXPRESS

### Length

1 hour

### Training Type

eLearning module

### Course Overview

The MC Express Training Course will introduce all aspects of MC Express, our mobile product module in Maintenance Connection. This course will cover how to manage assets, work orders, parts, and system administration features.

### Course Objectives

- Navigate to various areas of asset, work order, and part management.
- Navigate the user interface, administration settings
- Manage assets, work orders, and parts in MC Express

**Key tasks:** Navigating MC Express, utilizing all features when managing assets, work orders, and parts, and Understand MC Express preferences/rights.

### Course Topics

- Overview of MC Express
- Asset Management through MC Express
- Work Order Management through MC Express
- Part Management through MC Express
- System Administration for MC Express

### Course Audience

- Technicians
- System Administrators
- Site Administrators

## **MAINTENANCE CONNECTION END-USER CERTIFICATION EXAM**

### **Length**

2 hours

### **Training Type**

eLearning module

### **Course Overview**

The Maintenance Connection End-User Certification Exam will test that the user has the knowledge needed to perform the basic system activities required to support the organization's Maintenance Connection function. Prepare for the Exam using the Maintenance Connection Standard training World Class Academy courses.

### **Exam Topics**

- User and Password Management
- Functions of the Asset Module
- Work Order Processes
- Navigating MC Express
- Customizing the User Interface
- Preventive Maintenance Setup
- Ordering and Managing Inventory
- Basics of Reporting

### **Exam Audience**

- Maintenance Connection End-Users

# SYSTEM ADMINISTRATOR

## SYSTEM ADMINISTRATOR

### Length

2 hours

### Training Type

eLearning module

### Course Overview

The System Administrator Training Course will introduce you to the purpose and functionality of various system administration privileges and functionality. Each module will provide an overview of different beneficial options and tools to create efficiencies and structure for your company's needs.

### Course Objectives

- Navigate the various system admin tools and interfaces.
- Utilize various system admin tools within the MRO.
- Describe the purpose and effect of these various tools, modules, and system administration records.

**Key tasks:** Document Management, Understand Access Groups, Understand KPI configuration.

### Course Topics

- Document and File Management
- User and Password Management
- Overview of Access Groups
- Managing KPIs and Dashboards
- Customizing the User Interface
- Human Resource Management
- Rules Manager: Events and Notifications

### Course Audience

- System Administrators
- Site Administrators
- Maintenance Managers



## **SYSTEM ADMIN CERTIFICATION EXAM**

### **Length**

2 hours

### **Training Type**

eLearning module

### **Course Overview**

The Maintenance Connection System Certification Exam will test that the user has the knowledge needed to perform the basic system activities required to support the organization's Maintenance Connection function. Prepare for the Exam by completing the Maintenance Connection standard End-User courses and Exam, and the System Administrator course.

### **Exam Topics**

- Document and File Management
- User and Password Management
- Overview of Access Groups
- Managing KPIs and Dashboards
- Customizing the User Interface
- Human Resource Management
- Rules Manager: Events and Notifications

### **Exam Audience**

- System Administrators

## **MAINTENANCE CONNECTION ADD-ON TRAINING COURSES**

The Accruent Academy offers the following Add-On training for Maintenance Connection users. These can be purchased through Accruent Academy or a statement of work.

### **MAINTENANCE CONNECTION STANDARD - INSTRUCTOR-LED**

#### **Length**

16 hours

#### **Training Type**

Virtual Instructor-led or onsite

#### **Course Overview**

This instructor-led training course provides an overview of all the features and functions of Maintenance Connection to get you acclimated to your organization's system navigation, terminology, and potential. It covers the key concepts and processes of each of the main Maintenance Connection modules and includes hands-on exercises to reinforce the topics learned. This course is designed to prepare your team for your Maintenance Connection implementation or be used as a full product refresher for existing customers.

#### **Course Objectives**

##### **Maintenance Connection Fundamentals**

- Identify how to log in and navigate to helpful resources.
- Navigate to different applications, modules, pages, and records.
- Understand the different Help tools and forums available outside of the Academy

##### **Assets and Infrastructure**

- Navigate and use the Asset Hierarchy, Asset tabs and sections, and Asset association.
- Utilize various configurations and preferences to meet company needs.
- Create important Asset reports, meter readings, and UDFs.

##### **Work Management**

- Navigate the Work Order module tabs, sub-tabs, sections, and fields.
- Understand the process surrounding Work Order creation and management
- Identify different methods for creating work orders

**Parts and Purchasing**

- Define the components when configuring parts.
- Define the relationship between parts and stockrooms.
- Identify the process surrounding Purchase Order creation

**Reporting**

- Navigate and use the features for managing basic, intermediate, and advanced reports.
- Understand criteria selection and manipulation

**Preventive Maintenance and Project Management**

- Create and manage procedures and preventive maintenance records.
- Define the purpose and method for creating Projects

**MC Express**

- Navigate to various areas of asset, work order, and part management.
- Navigate the user interface, administration settings
- Manage assets, work orders, and parts in MC Express

**System Administrator**

- Navigate the various system admin tools and interfaces.
- Utilize various system admin tools within the MRO.
- Describe the purpose and effect of these various tools, modules, and system administration records.

**Course Audience**

- System Administrators
- Site Administrators
- Maintenance Managers

## **MAINTENANCE CONNECTION STANDARD – INSTRUCTOR-LED – ROLE-BASED PACKAGES**

### **Course Overview**

The Standard Maintenance Connection Instructor-Led course can also be purchased in role-based packages delivered virtually. We have several recommended packages and can also develop something specific to your requirements.

### **Recommended Packages**

#### **System Administrator (8 hours)**

- Maintenance Connection Fundamentals
- Reporting
- System Administrator

#### **Product Lead/Supervisor (12 Hours)**

- Maintenance Connection Fundamentals
- Assets and Infrastructure
- Work Management
- Parts and Purchasing
- Preventive Maintenance and Project Management
- MC Express
- Reporting
- System Administrator (Advanced Tools only)

#### **Technician (8 hours)**

- Maintenance Connection Fundamentals
- Assets and Infrastructure
- Work Management
- MC Express

#### **Purchasing Manager (5 hours)**

- Maintenance Connection Fundamentals
- Parts and Purchasing
- Reporting

#### **Dispatch (4 hours)**

- Maintenance Connection Fundamentals
- Work Management
- Assets and Infrastructure

## MAINTENANCE CONNECTION REPORTING SERIES – INSTRUCTOR-LED

### Length

11.5 hours

### Training Type

Virtual Instructor-led

### Course Overview

This series of 4 instructor-led training courses provide an in-depth look at all the features, functions, and real-life uses of the Maintenance Connection Reporter application. It covers the key processes for creating and managing your reports and includes hands-on exercises to reinforce the topics learned. This course is designed to instruct your administrators and reporters on the full scope of the Reporter application so data collected in everyday use of the system can be harnessed for greater organizational efficiency. The courses can be purchased individually or as a package. Minimum 5, maximum 10 participants per session.

Beginning Reporter	Intermediate Reporter	Advanced Reporter	KPIs and Dashboards
<p><b>Length:</b> 2.5 hours</p> <p><b>Course Objectives</b></p> <ul style="list-style-type: none"> <li>▪ Navigate the Reporter Application</li> <li>▪ Identify the basic capabilities of reports</li> <li>▪ Configure a basic report</li> </ul> <p><b>Course Topics</b></p> <ul style="list-style-type: none"> <li>▪ Accessing the Reporter</li> <li>▪ Reporter Interface</li> <li>▪ Types of Reports</li> <li>▪ Creating a Report</li> <li>▪ Choosing Report Criteria</li> <li>▪ Configuring the Report</li> <li>▪ Exporting Reports</li> </ul> <p><b>Course Audience</b></p> <ul style="list-style-type: none"> <li>▪ Any role that may interact with Reports</li> </ul>	<p><b>Length:</b> 3 hours</p> <p><b>Course Objectives</b></p> <ul style="list-style-type: none"> <li>▪ Identify the features and functions of the Report Setup window</li> <li>▪ Understand basic data relationships</li> <li>▪ Demonstrate style configurations</li> <li>▪ Explain fundamental Smart features</li> </ul> <p><b>Course Topics</b></p> <ul style="list-style-type: none"> <li>▪ Reporter Setup Navigation</li> <li>▪ Data Relationships</li> <li>▪ Style and Format Configuration.</li> <li>▪ Smart Report Functions</li> <li>▪ Smart Report Popups</li> </ul> <p><b>Course Audience</b></p> <ul style="list-style-type: none"> <li>▪ System Administrators, Super Users, Project Leads, or anyone whose role requires in-depth knowledge of Reporting</li> </ul>	<p><b>Length:</b> 4 hours</p> <p><b>Course Objectives</b></p> <ul style="list-style-type: none"> <li>▪ Perform advanced Setup functions, such as Joins, adjusting Fixed Criteria, and Custom Expressions</li> <li>▪ Configure a Summary Report</li> <li>▪ Configure a Pivot Report</li> </ul> <p><b>Course Topics</b></p> <ul style="list-style-type: none"> <li>▪ Custom Expressions</li> <li>▪ Modify Fixed Criteria</li> <li>▪ Adjust Table Joins</li> <li>▪ Editable Smart Reports</li> <li>▪ Summary Reports</li> <li>▪ Pivot Reports</li> </ul> <p><b>Course Audience</b></p> <ul style="list-style-type: none"> <li>▪ System Administrators, Super Users, Project Leads, or anyone whose role requires full knowledge of Reporting</li> </ul>	<p><b>Length:</b> 2 hours</p> <p><b>Course Objectives</b></p> <ul style="list-style-type: none"> <li>▪ Navigate the Dashboard</li> <li>▪ Identify the capabilities of KPIs</li> <li>▪ Demonstrate how KPIs and Reports overlap</li> </ul> <p><b>Course Topics</b></p> <ul style="list-style-type: none"> <li>▪ Overview of the Dashboard</li> <li>▪ Basics of KPI creation and understanding</li> <li>▪ KPIs in Reports</li> </ul> <p><b>Course Audience</b></p> <ul style="list-style-type: none"> <li>▪ System Administrators, Super Users, Project Leads, or anyone whose role requires in-depth knowledge of KPIs and Dashboards</li> </ul>

## **ADDITIONAL PRODUCTS**

### **eLEARNING FILES**

#### **Maintenance Connection 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 customers' LMS, to be used to train an unlimited amount of end users.

Available training courses for this option:

- Assets & Infrastructure
- Work Order Management
- Preventive Maintenance & Project Management
- Parts and Purchasing
- MC Express
- System Administrator
- Fundamentals
- Reporting

### **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****Maintenance Connection Custom Training**

We can provide training tailored to your environment, built from a collaboration between our Product Trainers and your Subject Matter Experts (SMEs). 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.

**Maintenance Connection Training Needs Analysis Workshop**

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

**Maintenance Connection Custom End User Training Course via eLearning**

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

Multiple training courses can be created to accommodate all applicable different training groups. Accruent Academy develops customized eLearning training courses using professional authoring tools, the "Articulate 360" suite. The courses are delivered in SCORM format. When other languages are required, you can choose to subtitle or completely narrate the eLearning courses.

**ON-DEMAND****Maintenance Connection Instructor-Led Classroom Training – Standard or Customized**

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

The Accruent Academy provides classroom training using 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](mailto:Training@accruent.com)) for more options.



**Please contact the Accruent Academy at [Training@accruent.com](mailto:Training@accruent.com) for more information on Maintenance Connection 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.