# ACCRUENT academy

# MERIDIAN

# 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 Meridian solution.

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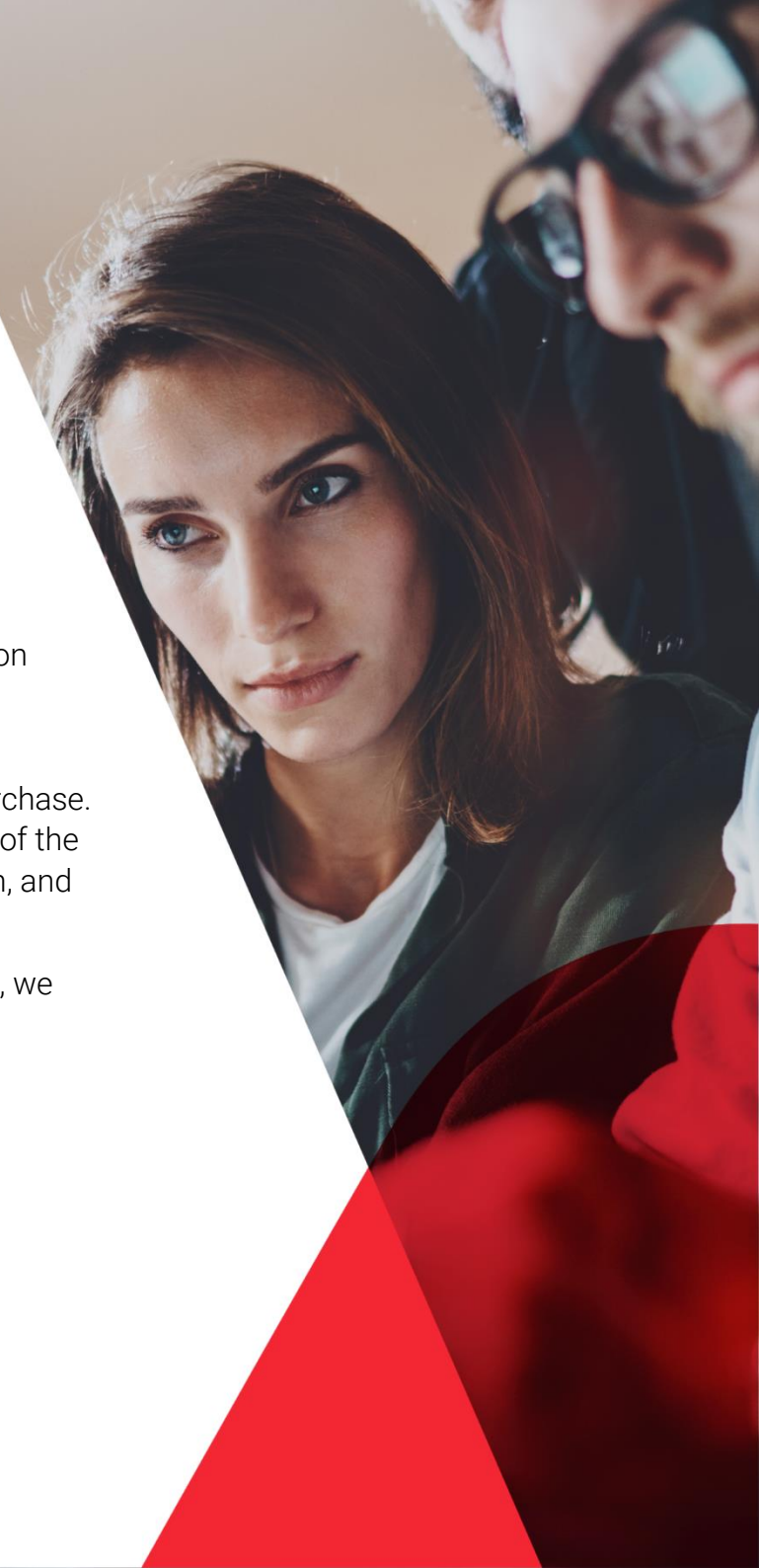
# TRAINING METHODOLOGY

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 Meridian 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 Meridian 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 Meridian 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 location.

## CUSTOM-BUILT TRAINING
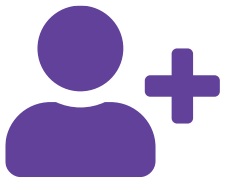
Accruent has its own training department with highly experienced Product Trainers and eLearning Developers. We offer custom training courses tailored to the different user roles and unique business processes in your organization. Our team begins this process by scheduling a meeting with you to ensure 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.
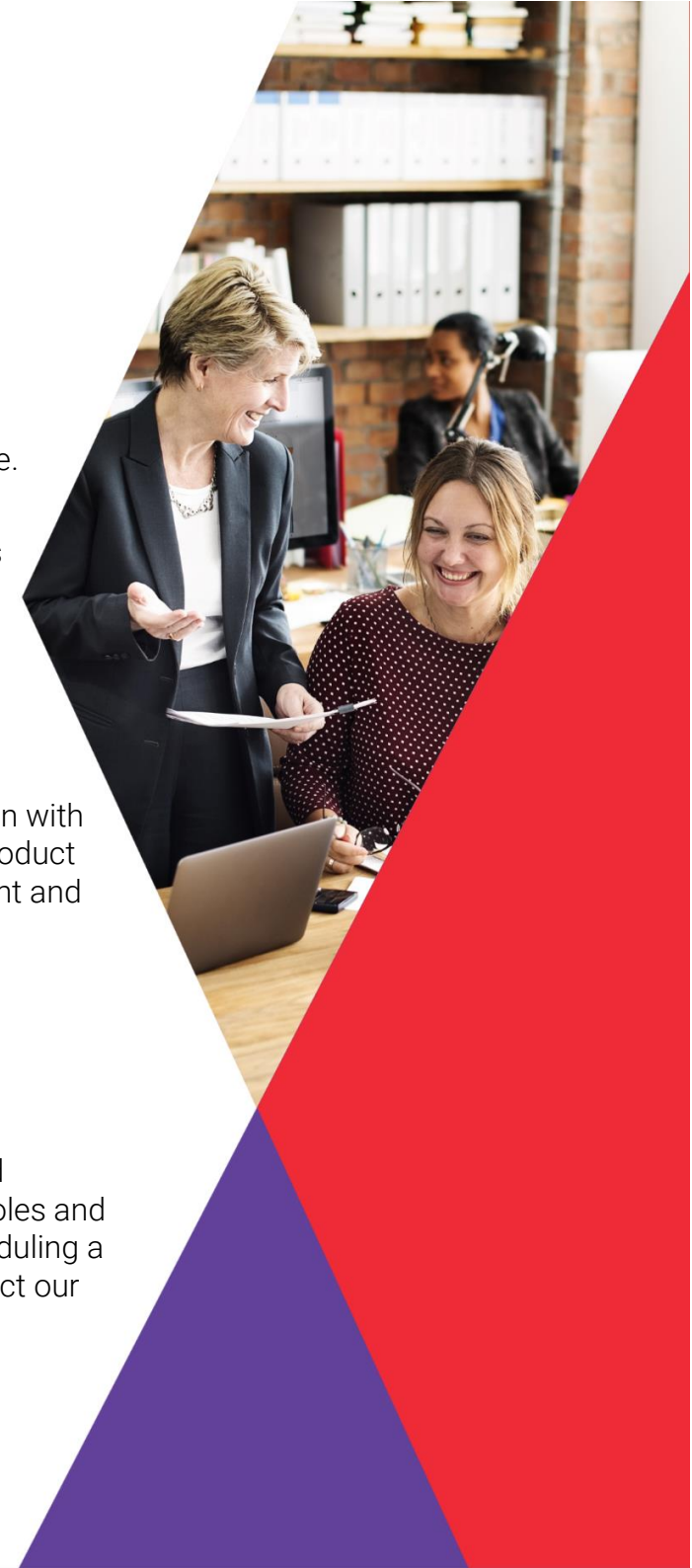
## STANDARD TRAINING BY ROLE – INCLUDED

Accruent Academy provides standard Meridian 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 Meridian Server and Cloud users.  More detailed information on all courses is provided in subsequent sections.  Additional standard training users can be purchased, as needed.

| Course | Format | Role | | | | |
|---|---|---|---|---|---|---|
| | | Server End–User | Server Support Admin | Server Business Admin | Cloud End–User | Cloud Admin |
| Server Fundamentals | eLearning | R | R | R | | |
| Server Explorer End-User | eLearning | R | R | R | | |
| Server Power End-User | eLearning | R | R | R | | |
| Server Support Admin | eLearning | | R | | | |
| Server Business Admin | eLearning | | | R | | |
| Server Portal Administrator | eLearning | | O | O | | |
| Server Support Admin Exam | Exam | | R | | | |
| Server Business Admin Exam | Exam | | | R | | |
| Cloud Fundamentals | eLearning | | | | R | R |
| Cloud End-User | eLearning | | | | R | R |
| Cloud Administrator | eLearning | | | | | R |
| Cloud Administrator Exam | Exam | | | | | R |
| Meridian Portal End-User | eLearning | O | O | O | O | O |
| Meridian Mobile | eLearning | O | O | O | O | O |

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

## 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 | | | | |
|---|---|---|---|---|---|---|
| | | Server End-User | Server Support Admin | Server Business Admin | Cloud End-User | Cloud Admin |
| Q&A Session with Product Trainer | Virtual Instructor-Led | x | x | x | x | x |
| Server System Admin | Virtual Instructor-Led | | x | x | | |
| Cloud End-User | Virtual Instructor-Led | | | | x | x |
| Server End-User | Virtual Instructor-Led | x | x | x | | |

# MERIDIAN STANDARD TRAINING COURSES – SERVER USERS

The Accruent Academy offers the following standard training courses for Meridian Server Users, included in the software purchase.

## SERVER FUNDAMENTALS

**Length**
30 min

**Training Type**
eLearning modules

### Course Overview
This training is meant for the Meridian Server End-User and the Implementation Team members. The training contains eLearning modules that explain the key concepts and theory needed to get started with Meridian Server.

### Course Objectives
- Explain the concepts of Meridian Server
- Explain the use of the different Meridian clients

### Course Topics
- Meridian Administration
- Managing your Meridian Server Environment
- Distributing Documentation at large in your company
- Document Exchange with External Parties
- Cloud Analytics

### Course Audience
- Meridian Server Implementation Project Team
- All Meridian Server End-Users

## SERVER EXPLORER END-USER

**Length**
1 hour

**Training Type**
eLearning modules

**Course Overview**
This training course provides the knowledge and skills required to use all standard functionality of Meridian Server Explorer. The training course contains different modules, interactive simulated exercises, and knowledge checks to ensure you know everything you need to know to use Meridian Server Explorer.

**Course Objectives**
- Be able to search, view, print documents
- Use the Meridian Explorer views successfully

**Key tasks:** Viewing Documents

**Course Topics**
- Explorer Interface
- Using Document View and Searching
- Viewing Documents and Comments
- Document Actions
- Collections and Packages
- Projects
- Tag Views
- Import Packages

**Course Audience**
- Document Viewers
- Maintenance workers

## SERVER POWER END-USER

**Length**
2 hours

**Training Type**
eLearning modules

### Course Overview
This training course provides the knowledge and skills required to use all standard functionality of the Meridian Server Power client. The training contains different modules, recorded lectures, and interactive simulated exercises to ensure you know everything you need to know to use Meridian Server Power.

### Course Objectives
- Work with documents, both existing and newly created
- Participate in Meridian workflow processes
- Explain how Meridian helps with concurrent engineering
- Demonstrate the relationships between documents and assets

**Key tasks:** Viewing, Creating, Editing, Approving Documents, and Sending documents to Meridian Portal

### Course Topics
- Basic Navigation
- Accessing Existing Documents
- Working with Documents
- Workflow and Managed Change
- Advanced Actions
- Concurrent Engineering
- Create a Project Copy
- Release to Master
- Project Workflow
- Asset Management
- Managing Links

### Course Audience
- Meridian Server Implementation Project Team
- Engineers, Creators, and Editors
- Approvers

## SERVER SUPPORT ADMINISTRATOR

**Length**
2 hours

**Training Type**
eLearning modules

### Course Overview

This in-depth training provides the knowledge and skills required to ensure successful maintenance of your Meridian Server Environment. The training focuses on the functionality used by administrators, including license and user management, backups, and all applicable day-to-day maintenance activities.

This training course is aimed at system administrators and/or application managers and will facilitate the installation, setup, and maintenance of the Meridian Server solution for your organization. Upon completion, access to Accruent's Self-Service Center is granted to create support cases in the customer portal. Cases will be handled by the Accruent Support department.

### Course Objectives

- Manage key areas of the server to support vault health
- Perform regular maintenance such as backups to maintain an operational system
- Consult system logs
- Maintain an Explorer repository
- Manage Publisher jobs

**Key tasks:** Configuring, Maintaining, Installing, and Applying System Settings

### Course Topics

- Accruent Customer Portal
- Pre-Installation tasks
- Installation
- Post- Installation Tasks
- Migration Scenarios
- Vault Management
- User Management

- System Logging
- Configuring Renditions
- Asset Management
- Synchronizing Meridian to Explorer
- Publisher
- Import / Export Options

### Course Audience

- System Administrators and Business Administrators

## SERVER SUPPORT ADMINISTRATOR EXAM

**Length**
2 hours

**Training Type**
Exam

**Course Overview**
The Meridian Server Support Administrator 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 Meridian implementation.

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

**Exam Topics**
- Meridian Server Fundamentals
- Meridian Server Power End-User
- Meridian Server Explorer End-User
- Meridian Server Portal End-User
- Meridian Support Administration

**Exam Audience**
- Meridian users that will act as Support Contacts

## SERVER BUSINESS ADMINISTRATOR

**Length**
6 hours

**Training Type**
eLearning modules

### Course Overview

This in-depth training provides the knowledge and skills required to use all standard functionalities of the Configurator of Meridian Server. The training focuses on the functionality used by business administrators, including simple configuration changes, updates to system values, and applicable day-to-day maintenance activities.

This training course is aimed at system administrators and/or application managers and will facilitate the maintaining of the configuration options of the Meridian Server solution for your organization. Upon completion, access to Accruent's Self-Service Center is granted to create support cases in the customer portal. Cases will be handled by the Accruent Support department.

### Course Objectives
- Navigate the Meridian Configurator to view all the settings of a Meridian configuration
- Use the Meridian Configurator to modify an existing Meridian configuration
- Configure an Explorer repository for document consumption
- Support your end-users

**Key tasks:** Configuring, Maintaining, and Applying System Settings

### Course Topics
- Accruent Customer Portal
- Fundamental Configurations
- Advanced Configurations
- Quality of Life Configurations
- Configuring Renditions

- Asset Management
- Introduction to Explorer
- Explorer Views
- Publisher
- Import / Export Options

### Course Audience
- System Administrators
- Business Administrators

## SERVER BUSINESS ADMINISTRATOR EXAM

**Length**
2 hours

**Training Type**
Exam

### Course Overview
The Meridian Server Business Administrator 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 Meridian Server implementation.

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

### Exam Topics
- Meridian Server Fundamentals
- Meridian Server Power End-User
- Meridian Server Explorer End-User
- Meridian Server Portal End-User
- Meridian Business Administration

### Exam Audience
- Meridian users that will act as Support Contacts

## SERVER PORTAL ADMINISTRATOR

**Length**
1 hour

**Training Type**
eLearning modules

**Course Overview**
The training course provides an overview of all the features and functions of Meridian Portal administration. This training ensures successful use of the Meridian Portal environment within your organization while connected to your Meridian Server environment. The training contains different eLearning modules for explaining the key concepts of Meridian Portal functionality at the administration level and how to manage your various Meridian Portal projects.

**Course Objectives**
- Manage general Meridian Portal settings
- Manage the Meridian Portal project repositories
- Manage Meridian Portal users and their roles

**Key tasks:** Configuring, Maintaining, and Applying System Settings

**Course Topics**
- Logging in to Meridian Portal
- Configuring Meridian Portal settings
- Managing Meridian Portal project repositories

**Course Audience**
- System Administrators
- Business Administrators

# MERIDIAN STANDARD TRAINING COURSES – CLOUD USERS

The Accruent Academy offers the following standard training courses for Meridian Cloud Users, included in the software purchase.

## CLOUD FUNDAMENTALS

**Length**
0.5 hour

**Training Type**
eLearning modules

**Course Overview**
This training is meant for the Meridian Cloud End-User and the Administration Team members. The training contains eLearning modules that explain the key concepts and theory needed to get started with Meridian Cloud.

**Course Objectives**
- Introduce the concepts of Meridian Cloud
- Explain the use of the different Meridian clients

**Course Topics**
- Meridian Concepts and the Landing Page
- Key Concepts of Meridian Power
- Key Concepts of Meridian Explorer
- Key Concepts of Meridian Portal
- Key Concepts of Meridian Cloud Analytics

**Course Audience**
- Cloud Implementation Project Team
- Cloud End-Users
- External contractors

## CLOUD END-USER

**Length**
2 hours

**Training Type**
eLearning modules

**Course Overview**
The training course provides the knowledge and skills required to work with Meridian Cloud. This training ensures successful use of the Meridian Cloud environment within your organization. The training contains different eLearning modules explaining how to use all aspects of Meridian Cloud on a day-to-day basis.

**Course Objectives**
- Explain and demonstrate the various functionalities of all the Meridian Cloud clients

**Course Topics**
- Accessing Existing Documents
- Working with Documents and Concurrent Engineering
- Workflows
- Working with Assets
- Using Explorer
- Maintenance Connection Integration
- Meridian Cloud for Life Sciences: End-User

**Key tasks:** Editing, Approving, and Collaborating in Meridian Cloud

**Course Audience**
- Cloud End-Users
- External contractors

## CLOUD ADMINISTRATOR

**Length**
2 hours

**Training Type**
eLearning modules

### Course Overview
The training course provides the knowledge and skills required to manage your Meridian Cloud environment, including configuring System Settings, User Groups, and applying security settings for your organization. The training contains different eLearning modules and hands-on exercises to gain in-depth knowledge of Meridian Cloud and its configuration.

### Course Objectives
- Explain the concepts of Meridian Cloud
- Manage the users connected to the Meridian Cloud tenancy for all clients
- Configure Meridian Cloud settings
- Manage Meridian Portal project repositories

**Key tasks:** Configuring System Settings, Configuring Metadata Quality, Configuring Meridian Portal and Power connection, Managing User Groups and applying security settings, Installing Application Integration

### Course Topics
- Meridian Cloud Overview
- Deploying Meridian Cloud
- Configuring Meridian Cloud
- Managing Portal Project Repositories
- Watermarks and eSignatures
- Meridian Cloud for Life Sciences: Cloud Admin

### Course Audience
- Cloud Administrators
- Business Administrators

## CLOUD ADMINISTRATOR EXAM

**Length**
1 hour

**Training Type**
Exam

**Course Overview**
The Meridian Cloud Administrator 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 Meridian Cloud implementation.

**Exam Topics**
- Meridian Cloud Overview
- Deploying Meridian Cloud
- Configuring Meridian Cloud
- Meridian Portal Overview
- Managing Portal Project Repositories

**Exam Audience**
- Cloud Administrators
- Business Administrators

# MERIDIAN STANDARD TRAINING COURSES – CLOUD OR SERVER USERS

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

## MERIDIAN PORTAL END-USER

**Length**
1 hour

**Training Type**
eLearning modules

### Course Overview
This training provides the knowledge and skills required to use all standard functionality of Meridian Portal. The training contains different modules, interactive simulated exercises, and knowledge checks to ensure you know everything you need to collaborate with external users using Meridian Portal.

### Course Objectives
- Explain the concept of Meridian Portal and why you would use it
- Send and receive documents to/from contractors
- Participate in a review cycle

**Key tasks:** Exchanging documents with external parties, routing documents through workflow for review and approval, downloading and uploading documents as an external party

### Course Topics
- Logging in for the first time
- Working with Projects Repositories
- Working with Review Packages
- Working with Quick Shares
- Viewing Documents

### Course Audience
- Collaborating End-Users
- External contractors

**ALL**

## MERIDIAN MOBILE

**Length**
30 minutes

**Training Type**
eLearning modules

**Course Overview**

This training will cover the Meridian Mobile client. After this course, Meridian end-users will be able to demonstrate how to download and log in to the Meridian Mobile application and explain how to use the Mobile application.

**Course Objectives**
- Download the Mobile application
- Log on to the Mobile application
- Demonstrate how to use the Mobile application

**Key tasks:**  Downloading Mobile application, Logging into Mobile application, navigating within the application, Locating documents within application

**Course Topics**
- Downloading and logging on to Meridian Mobile
- Using Meridian Mobile

**Course Audience**
- End-Users
- System Administrators

# MERIDIAN ADD-ON TRAINING COURSES

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

## Q&A SESSION WITH PRODUCT TRAINER

**Length**
2 hours

**Training Type**
Virtual Classroom

**Course Overview**
This is a group session (up to 5 people) or a one-on one session with an experienced product trainer, providing learners the ability to ask questions on Meridian topics.  Initial question list to be provided by attendees, prior to the session.

**Course Objectives**
- Answer questions regarding Meridian Server or Meridian Cloud

**Course Topics:** Topics to be reviewed will depend on questions asked during the session but may include some or all the listed topics.
- Meridian Server
- Meridian Cloud

**Course Audience**
- All Meridian Server and Cloud Users

## SERVER SYSTEM ADMIN – INSTRUCTOR–LED

**Length**
16 Hours

**Training Type**
Virtual Classroom or onsite, up to 10 people

**Course Overview**

This course is perfect for Admins who prefer completing their training with our Meridian Product Trainer rather than through the self-paced eLearning modules. The Server System Admin Instructor-Led training combines the knowledge from both the Support and Business Admin eLearning courses to provide the skills and understanding required to maintain your Meridian Server Environment.

**Course Objectives**
- Manage key areas of the server to support vault health
- Perform regular maintenance such as backups
- Consult system logs
- Maintain an Explorer repository
- Navigate the Meridian Configurator
- Use the Meridian Configurator
- Configure an Explorer repository
- Support your end-users
- Manage rendition generation from configuration to supporting errors

**Key Tasks:** Configuring, Maintaining, Installing, and Applying System Settings

**Course Topics**
- Accruent Customer Portal
- Pre-Installation tasks
- Installation
- Post- Installation Tasks
- Migration Scenarios
- Vault Management
- User Management
- System Logging
- Fundamental Configuration
- Advanced Configuration
- Quality of Life Configurations
- Configuring Renditions
- Asset Management
- Introduction to Explorer
- Synchronizing Meridian to Explorer
- Explorer Views
- Publisher
- Import / Export Options

**Course Audience**
- System Administrators

## MERIDIAN CLOUD END-USER – INSTRUCTOR-LED

**Length**
9 hours over multiple sessions for each Meridian client

**Training Type**
Virtual Instructor-Led or onsite; up to 10 people

**Course Overview**
This course is perfect for Meridian Cloud users who prefer completing their training with our Meridian Product Trainer rather than through the self-paced eLearning modules. This virtual classroom training builds on the standard Cloud End-User eLearning courses, providing more detail, live demonstrations, and instructor Q&A on day-to-day activities.

**Course Objectives**
- Explain and demonstrate the various functionalities of all the Meridian Cloud clients

**Course Topics**
- What is Meridian Cloud?
- Using Meridian PowerWeb
- Using Meridian Explorer
- Using Meridian Portal
- Using other clients

**Key tasks:** Editing, Approving, and Collaborating in Meridian Cloud

**Course Audience**
- Cloud End-Users
- Cloud Admins
- External contractors
- Implementation Team

## SERVER END-USER – INSTRUCTOR-LED

**Length**
8 hours over multiple sessions for each Meridian client

**Training Type**
 Virtual Instructor-Led or onsite, up to 10 people

**Course Overview**
This course is perfect for Server End-Users who prefer completing their training with our Meridian Product Trainer rather than through the self-paced eLearning modules. This virtual classroom training builds on the standard Server End-User eLearning courses, providing more detail, live demonstrations, and instructor Q&A on day-to-day activities.

**Course Objectives**
- Explain and demonstrate the various functionalities of all the Meridian Server clients

**Course Topics**
- Using Meridian PowerWeb
- Using Meridian Explorer
- Using Meridian Portal

**Course Audience**
- Meridian Server Implementation Project Team
- Engineers, Creators, and Editors
- Approvers
- Document Viewers
- Maintenance workers
- Collaborating End-Users
- External contractors

## ADDITIONAL PRODUCTS

### eLEARNING FILES

#### Meridian eLearning file delivery

If 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. These files can be used to train an unlimited number of end-users. The approved courses are offered in SCORM or AICC format.

Available training courses for this option:

- Server Power End-User
- Server Explorer End-User
- Cloud End-User (includes Portal)
- Portal End-User

### MICROLEARNING

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.

## 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 30 minutes. Each TechTalk is recorded and made available in Accruent Academy for reference, to those who attend.

## CUSTOM BUILT

### Meridian Training Needs Analysis Workshop

A Meridian 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

### Meridian 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.

### Meridian 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.

## ON-DEMAND

### Meridian Instructor-Led Classroom Training – Standard or Customized

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