



Accruent Academy – Lucernex Training

Customer Training Catalog

Dec. 3, 2018

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ABOUT TRAINING

Accruent Academy believes that helping your users to understand the software's capabilities is the key to your success. In this catalog you will find all the essential facts in an easy overview of how to train System and Lease Administrators in your organization to become in-house experts with the technical knowledge to manage and maintain your Lucernex solution.

Helping users to work efficiently does not only ensure confidence and accelerates adoption it also increases your time to value. Our training is provided through blended (eLearning and classroom) training or on-site courses.

Both blended and on-site sessions are led by a Lucernex software expert in (virtual) classroom setup. All training courses end with a certification exam to verify understanding of material. Throughout the courses, you can monitor and track the growing performance.

Whether you are new to Lucernex software, in implementation, or an experienced user, we have a training that will benefit you.

REGISTRATION

Accruent's online learning environment; the "Accruent Academy Learning Center" is web-based and accessed through a software-based portal. Attendees can register free of charge and connect from everywhere in the world at any point in time to start your learning journey.

Within the Accruent Academy Learning Center you will be guided to find training course you need. After selection of your training course you will be provided with the training dates, links to the virtual training session, thereafter you can attend the training in virtual classroom setup.

TRAINING COURSES AND DELIVERY TYPES

As our software has evolved to meet our customers' needs, so too has our approach to training. That's why we're making our training programs as accessible as we can. By offering our training via Blended Learning (eLearning and virtual classroom) and on-site classroom training options, you can find the delivery method that suits your teams' needs.

Blended Learning



Blended learning is the recommended approach for the training courses by using a combination of instructor led virtual classes and eLearning. Blended learning offers flexible time frames offering them the ability to learn at their own pace. Our Instructors bring in depth knowledge through virtual classroom sessions and our eLearning course supports the learner not only throughout these sessions but also in their day-to-day jobs.

Blended Learning is provided for the following training courses:

- Lucernex Lease Administrator Training Course

eLearning



Accruent’s online learning environment; the “Accruent Academy Learning Center” is web-based and accessed through a software-based portal.

All online curriculums contain interactive eLearning modules to learn content, simulated exercises and knowledge checks to ensure content is learned. Training completion can be extracted through reporting by the assigned training coordinator and uploaded into your HR system.

eLearning is provided for the following training courses:

- Lucernex Foundations for Lease Training Course
- Lucernex Fundamentals Training Course

Instructor-Led Training

All classroom courses are conducted via professional instructors from the Accruent Academy. The classes allow for a maximum of 1 to 10 ratio between trainer and attendees to ensure high engagement and attention.

- **Attendees are required to bring their own laptops.**

Accruent's traditional classroom training courses are conducted in the following format:



Virtual classroom via WebEx



Classroom on Accruent Premise;

[Accruent LLC, Texas](#)



**Classroom on-site;
on customer demand**

Instructor Led-Training is provided for the following training courses:

- Lucernex System Administrator Training Course
- Lucernex Lease Administrator Training Course
- Lucernex Equipment contracts Training Course
- Lucernex Report Building Training Course

TRAINING OFFERINGS FOR ADMINISTRATORS

Lucernex Lease Administrator Training Course

Lease Admin training is for daily Lucernex users and Support Contacts (super users) to receive a basic overview of all components in the Contracts Module of Lucernex. This training will be a combination of lecture videos through our LMS and in person hands-on practice with the software. There will be guided and independent lease scenarios to complete while at the Austin location.

Recommended delivery format:



Delivery Type: Blended Learning

Duration: 1.5 days classroom in Austin, Texas + 4-hour eLearning & certification

Targeted Audience: **Clients who purchased LX Contracts**

Lease Administrators, Support Contact(s), and Lease Accountants

Registration: [Accruent Academy Learning Center](#)

List Price: \$ 1,995 per person

Date	Seats Available
December 4-5, 2018	Closed
January 8-9, 2019	Open; Blended Learning
February 5-6, 2019	Open; Blended Learning
March 12-13, 2019	Open; Blended Learning
April 9-10, 2019	Open; Blended Learning

Training Outline

- Lifecycle Overview
- Abstract Information
 - Terms
 - Covenants
 - Responsibilities
 - Setup Wizards
- Payment Information
 - Transactions
 - Approving Payments
 - Recurring Expenses
 - Vendor Allocations
 - Generating Rent
 - Retro Payments
 - Alternate Rent
 - Scheduled Offsets
 - Allowances
 - Security Deposits
 - Receipts
- Percentage Rent
 - Breakpoints
 - Exclusions
 - Processing
- Recoveries
- Accruals
 - Expense Accruals
 - Accrual Transactions
 - Percentage Rent Accruals
- Accounting Information
 - ASC 842
 - IFRS 16
 - Capital Lease Test
 - Straight Line
 - Accounting Assumptions
 - Schedules
- Reporting
 - Global Reports
 - Creating a New Report

Lucernex Foundations for Lease

This class covers the basics of being a system administrator. Anyone responsible for the configuration of the firm or highly involved in an implementation should attend this class.

Recommended delivery format:



Delivery Type: eLearning

Duration: 4 hours

Targeted Audience: **Clients who purchased LX Contracts and/or LX Equipment Contracts**

Support Contact(s) and System Admins

Registration: [Accruent Academy Learning Center](#)

List Price: \$ 495 per person

Training Outline

- | | |
|---|---|
| <ul style="list-style-type: none"> • Real Estate Lifecycle Overview • Membership Administration <ul style="list-style-type: none"> ○ Employers ○ Members/Contacts ○ Security ○ Portfolio and Entity Membership • Folders <ul style="list-style-type: none"> ○ Templates ○ Documents ○ Binders | <ul style="list-style-type: none"> • Entity Creation • Pages <ul style="list-style-type: none"> ○ Subpages ○ Summary pages ○ List Layouts ○ Wizard Setup Pages ○ Map Pages • Fields <ul style="list-style-type: none"> ○ Entity Data Fields ○ Dropdowns ○ Custom Lists |
|---|---|

Lucernex System Administrator Training Course

This class covers the basics of being a system administrator. Anyone responsible for the configuration of the firm or highly involved in an implementation should attend this class.

Recommended delivery format:



Delivery Type: Instructor-Led; Classroom on Accruent Premise; [Accruent LLC, Texas](#)

Duration: 3 days + certification

Targeted Audience: **Clients who purchased LX Projects, LX Capital Projects, or LX Markets and Sites**

Registration: [Accruent Academy Learning Center](#)

List Price: \$1,750 per person

Date	Seats Available
January 22-24, 2019	Open
April 23-25, 2019	Open

Training Outline	
<ul style="list-style-type: none"> • Lifecycle Module Overview • Membership • Security • Templates <ul style="list-style-type: none"> ○ Budget Templates ○ Folder & Binder Templates ○ Schedule Templates ○ Milestone Templates 	<ul style="list-style-type: none"> • UI Configuration <ul style="list-style-type: none"> ○ Data Fields ○ Page Layouts ○ Wizards ○ Custom Lists ○ Forms ○ Workflows • Reporting

Lucernex Equipment Contracts Training Course

This training will cover the fundamentals of abstracting equipment leases and lease administration processes.



Delivery Type: Instructor-Led; Virtual classroom

Duration: 3.5 hours

Targeted Audience: **Clients who purchased LX Contracts and/or LX Equipment Contracts**

Lease Administrators, Support Contact(s), and Lease Accountants

Registration: [Accruent Academy Learning Center](#)

List Price: \$445 per person

Date	Seats Available
December 6, 2018	Closed
January 17, 2019	Open
February 7, 2019	Open
March 14, 2019	Open
April 11, 2019	Open

Training Outline	
<ul style="list-style-type: none"> • Equipment Lifecycle & Master Equipment Lease • Setting Up Equipment Contracts • Adding the Equipment • Equipment Payment Schedules <ul style="list-style-type: none"> ○ Payment Schedules ○ Option Amounts • Import Functionality 	<ul style="list-style-type: none"> • Rent Processes <ul style="list-style-type: none"> ○ Approving Schedules ○ Generate Rent ○ One Time Transactions ○ Approving Payments • ASC 842 <ul style="list-style-type: none"> ○ Equipment ASC 842 Test ○ Equipment ASC 842 Schedule ○ Job Logs

TRAINING OFFERINGS FOR END USERS

Lucernex Report Building Training Course

This report training will help users gain a deeper understanding of the report tools and the database tables. This is an **advanced** training is meant for all users who actively create reports.



Delivery Type: Instructor-Led; Virtual classroom

Duration: 4.5

Targeted Audience: **Any client who desires and advanced training on Report Building**

Support Contact(s) and Designated Report Builders

Registration: [Accruent Academy Learning Center](#)

List Price: \$545 per person

Date	Seats Available
February 21, 2019	Open
May 23, 2019	Open

Training Outline

- | | |
|--|---|
| <ul style="list-style-type: none"> • Report Navigation • Global Reports • Reporting Basics <ul style="list-style-type: none"> ○ Report Types ○ Output Types ○ Filtering Options | <ul style="list-style-type: none"> • Understanding Tables • Report Building • Report Administration <ul style="list-style-type: none"> ○ Folder Structure ○ Security Settings ○ Report Buttons |
|--|---|

Lucernex Fundamentals Training Course

This quick training course covers the basics of using Lucernex solutions and is available for every user of Lucernex software.



Delivery Type: Integrated within Lucernex product located within the Global Tools.

Duration: 15 minutes

List Price: Free of charge

Training Outline

- | | |
|---|--|
| <ul style="list-style-type: none"> • Login Information • Basic Navigation <ul style="list-style-type: none"> ○ Tab navigations ○ Search Features ○ Panel Navigation and Features ○ Portfolio Options | <ul style="list-style-type: none"> • User Dashboard <ul style="list-style-type: none"> ○ Navigating the User Dashboard ○ Creating a personalized dashboard |
|---|--|

INSTRUCTOR-LED TRAINING CONDITIONS AND PREREQUISITES

Registration, Payment and Training Assignment

Upon signing of this SOW, registration must be done in the Accruent Learning Center via this self-registration link: Payment can be done by credit card or per invoice. Accruent must have received the payment prior to the beginning of training. If payment is late, Accruent reserves the right to deny an attendee access to the training.

To receive the ordered training courses, we assign the training courses to the attendees directly in the “Accruent Academy Learning Center”

Group Size

In order to guarantee the quality of training, the maximum number of attendees per training session is 10 for 1 trainer and 20 for 2 trainers. **For scheduled trainings, the minimum number of attendees is 4.** Accruent reserves the right to cancel a class if a minimum number of participants have not confirmed three weeks prior to the start of the class.

Scheduling

All classes start at 9:00am and finish at 5:00pm local time unless indicated or agreed upon otherwise. There are two coffee breaks of 10 minutes and a 60-minute lunch break. Attendees arriving by plane are strongly advised to allow enough time between arrival at the airport and the start of class and the end of class and departure. Refer to Agenda given in Outlook Calendar invite for specific times.

Please do not book non-refundable travel expenses prior to receiving confirmation of class enrollment and confirmed class date/time per Terms above.

Language

All training sessions are conducted in English. Instructors with additional language capabilities are available; Dutch and French. Training materials are provided in English only, unless otherwise agreed upon and at additional costs.

Cancellation Policy

Cancellation of a training session must be done in writing and be received by the Lucernex Training team at Accruent. Should the Client (or Participant) wish to cancel their training session, they must do so within the **5 business days** of their registered training.

Failure to cancel before the timeframe listed above will result in clients paying Accruent 50% of the training session fees. Failure to attend the training without alerting Accruent will result in the client paying 100% of the training session fees.

To cancel, email lxtraining@accruent.com.

Hardware and Software

Attendees are required to bring a notebook PC to the training that meets the following minimum requirements:

- Username/password with administrative rights to the PC
- Power outlet adaptor suitable for the location of the training
- Microsoft Excel installed on the laptop

LOCATION

Accruent HQ is located in North Austin in the Domain. The Domain is an Austin experience filled with a wide variety of restaurants, stores, and artisan bars and is a great place to take in Austin’s culture.

Accruent
11500 Alterra Pkwy #110
Austin, TX 78758

Hotels

There are many hotels in the area. A few are listed below. Please confirm availability of shuttle to/from Accruent and the Shops at the Domain or other areas if you will not have a car, or plan to utilize taxis, uber, etc.

Hotel	Location	Perks
Home2 Suites by Hilton	2800 Esperanza Crossing	<ul style="list-style-type: none"> • Walking distance to office (8 mins) • Walking distance to restaurants and shops • Located 0.3 miles from the office • One of the newest hotels in the area • Hilton Rewards
Archer Hotel	3121 Palm Way	<ul style="list-style-type: none"> • New Luxe Boutique Hotel Located • 0.1 mile from office • Walking distance to shops and restaurants • New American farm-to-table Restaurant
Residence Inn Austin Northwest	11301 Burnet Road	<ul style="list-style-type: none"> • Walking distance to office • Free shuttle • Great for extended stays (kitchenette in room and social events) • Located 0.3 miles from office • Marriott Rewards
Aloft Austin at the Domain	11601 Domain Drive	<ul style="list-style-type: none"> • Walking distance to office • Free shuttle • Walking distance to restaurants and shops • Located 0.4 miles from office • Starwood preferred Guest Rewards

Airport

Austin–Bergstrom International Airport
 Address: 3600 Presidential Blvd, Austin, TX 78719

Lucernex Software Training

November 2018

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