CenterStone

eCenterOne

Administrator Management Curriculum

CenterStone Software, Inc.

239 South St.

Hopkinton, MA 01748

Telephone 508-435-1510

Fax 508-435-1518

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Curriculum

Introduction

The purpose of this document is to outline the Administrator Management course for the eCenterOne application. This course Curriculum has been designed to assist you in scheduling the appropriate topics to be discussed during the upcoming Administrator Management Training session.

This document must be reviewed and approved by (client name) to ensure Centerstone Educational Services has created a Curriculum that will meet (client name) business needs.

Training Objectives

The high level training objectives for Centerstone Educational Services are to design a training program, which will meet (client name) business needs.

The key objectives have been designed to support the entire learning experience. The key objectives are:

- To design and deliver training to (client name) **at** (client site)
- Develop customized documentation which Includes: a Reference Guide, Classroom Guide, Instructor Guide and a Quick Reference Guide. After completing end user training Centerstone Educational Services will follow up with the main client contact to ensure the overall training experience was a success.
- Follow up will include a meeting (Onsite or via conference call) to receive feedback from the main client contact
- Included as part of the follow up will include a Centerstone Educational Services "Training Evaluation Summary" form to be completed by all end users who attended the training

Audience and Locations

The training program has been designed to encompass selected (client name) users. All of the roles from the list below will be trained on eCenterOne

- Application Administrator

Training will be delivered at the following site.

- (client name)

Training Environment

The success of the training session is paramount to the overall success of the Centerstone implementation. The following are the minimum environmental requirements required for a successful training session:

- Training facilities for the selected location accommodating 5-10 end users.

- Individual computers (desktop or laptop) for each end user
- Internet Access to accommodate the eCenterOne application
- Projector
- Flip Charts

Evaluation Strategy

The effectiveness and adequacy of the training program will be measured using several techniques. The measures resulting from the following techniques will be analyzed communicated to the client at the appropriate time.

- A Centerstone Educational Services training evaluation form will be distributed to **ALL** students following training. This will be used to determine the student's confidence with the course content, the instructor's ability and the quality of course documentation and training environment. The form will also include a list of additional courses, which can be requested by the client.
- A follow-up meeting will be scheduled for (tbd) following the training. This will be used to identify the clients overall satisfaction with the training and communication programs and to determine their current confidence with the system.
- Onsite - Assistance will be scheduled at the client site for approximately TBD following the training. (Client Option)

Approach to Delivery

This section outlines the approach for delivering (client name) training sessions. The course will follow the training agenda outlined in the next section. It will be delivered by a method called **Instructor Led Training**. This method uses the following two components:

1. Instructor Led Training

A Centerstone Educational Services instructor will guide the class through the topics described in the next section using independent exercises to reinforce learning. While the students are working on independent exercises, the Centerstone instructor will monitor their progress and assist when needed.

2. On Site Assistance (OSA)

Based on Centerstone's experience with other organizations, OSA is helpful to support and reinforce the lessons learned during training and to teach topics for smaller groups. Often users will ask questions in a one-on-one, desk side situation that they may not ask in class.

These visits will be constructed to reinforce learning and the instructor can ask the user to perform and demonstrate relevant basic system functionality. Questions asked of the student at the desk side can be uniform and an outline will be developed for the visits.

Curriculum

This section outlines the components for the Administration Management course that the Centerstone Educational Services team has identified as necessary for training for the (client name) team.

Value Proposition

- Provides users the ability to set up, manage and configure their company's eCenterOne application. The course also reviews in detail the User Management capability in the application.
- Assists Administrators in becoming familiar with how their companies can track information, label fields and forms in eCenterOne in the way that makes the most sense for their business and objectives.

Duration of Track

- 7-8 Hours

Roles Covered by Track

- Facilities Administrators

	Topic	Time
8:00-9:00 am	**Navigating the eCenterOne Application**	**60 Minutes**

	▪ <u>Logging In</u>
	▪ <u>Understanding the eCenterOne desktop</u>
	  o Terminology
	  o Functionality
	▪ <u>Search Functionality</u>
	  o Basic Search
	  o Custom Search
	▪ <u>Online Help</u>
	  o Accessing help	

9:00 am – 1:00 pm 15 Minute break 45 Minutes lunch	**Administrator Management (SetUp)**	**3 Hours**

- General
  - Managing Company Information
  - Defining Company Policies
  - Defining Default Label Types
  - Creating Address Regions
  - Defining Currencies
  - Creating SQL Commands
  - Creating Report Classifications
  - Creating Custom Search Definitions
  - Managing Dropdown lists
- Portfolios
  - Creating Portfolios
- Custom Attributes
  - Defining Custom Attributes
    - Sites
    - Buildings
    - Floors
    - Spaces
    - Zones
    - Measured Areas
    - Moves
    - Business Units
    - Human Resources
    - Lease
    - Operations Management
    - Project Management
- Structural Units
  - Creating Site Types
  - Creating Building Types
  - Creating Floor Types
  - Creating Space Function
  - Creating Space Type
  - Creating Space Status
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- Creating Space Sharing
- Creating Space Tenant
- Creating Space Grade Level
- Creating Zone Types
- Creating Measured Area Types
- Creating a Move Type
- Creating a Move Status
- Creating a Phase Type
- Creating a Phase Status

- Business Unit Types
  - Creating a Business Unit Type
- HR
  - Creating an HR Grade Level
  - Creating an HR Status
  - Creating an HR Employee Type
- Assets
  - Creating an Asset Manufacturer
  - Creating an Asset Relationship Type
  - Creating an Asset Status
- Leasing
  - Creating a Lease Status
  - Creating a Lease Type
  - Creating a Date Type
  - Creating a Clause Type
  - Creating a Contact Type
  - Creating a Period
  - Creating an Expense Type
  - Creating an Expense
  - Creating a Payment Type
  - Creating an Operating Company
- Operations Management
  - Creating a Service Request Status
  - Creating a Service Request Priority

- Creating Work Order Numbering
- Creating a Work Order Status
- Creating a Work Order Category
- Creating a Job Type
- Creating a Service Center
- Creating an Expense Type
- Defining a Billing Code
- Creating a Task Type
- Creating a Task Status
- Creating a Preventative Maintenance Type
- Creating a Service Code
- Creating Materials Type
- Creating Materials Definition
- Creating a Unit of Measure
- Creating an Operations Contact Type
- Creating an Operations Vendor Type
- Creating an Operations Project Type

- Project Management
  - Creating a Project Type
  - Creating a Project Priority
  - Creating a Project Status
  - Creating a Schedule Type
  - Creating a Schedule Status
  - Creating a Schedule Task Type
  - Creating a Schedule Task Status
  - Creating a Checklist Type
  - Creating a Checklist Status
  - Creating a Checklist Priority
  - Creating a Checklist Item Type
  - Creating a Checklist Assignment Status
  - Creating a Budget Status
  - Creating a Budget Type

- Creating a Budget Category
- Creating a Budget Heading Type
- Creating a Budget Line Item Type
- Creating a Budget Line Item Category
- Creating an Invoice Type

- Email Templates
  - Creating an Email Template
- Workflow
  - Creating Workflow

1:00 pm – 3:30 pm 15 Minutes break	**Administrator Management (User Management)**	**2.5 Hours**

- Users
  - Creating a User Profile
- Groups
  - Defining Functional Access
  - Defining Data Access
  - Creating a Dashboard
- Rules
  - Defining a User Management Rule
- User Management Role
  - Defining a User Management Role

3:30 pm – 4:00 pm	**Review and Wrap-Up**	**30 Minutes**

- Question and Answer Session
- Complete Evaluations