

CenterStone<sup>CS</sup>

eCenterOne

Lease  
Management  
Curriculum

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## Curriculum

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### Introduction

The purpose of this document is to outline the Lease 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 Lease 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.

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### 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.

- Asset Managers

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.
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- 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 Lease Management course that the Centerstone Educational Services team has identified as necessary for training for the (client name) team.

## Value Proposition

- ❑ Provides users with the ability to facilitate and manage the lease administration process by defining and executing lease entities within eCenterOne.

## Duration of Track

- ❑ 7- 8 Hours

## Roles Covered by Track

- ❑ Lease Administrators

|                   | Topic   | Time              |
|-------------------|---|-------------------|
| 8:00-9:00 am      | <b>Navigating the eCenterOne Application</b> <ul style="list-style-type: none"> <li>▪ <u>Logging In</u></li> <li>▪ <u>Understanding the eCenterOne desktop</u> <ul style="list-style-type: none"> <li>○ Terminology</li> <li>○ Functionality</li> </ul> </li> <li>▪ <u>Search Functionality</u> <ul style="list-style-type: none"> <li>○ Basic Search</li> <li>○ Custom Search</li> </ul> </li> <li>▪ <u>Online Help</u> <ul style="list-style-type: none"> <li>○ Accessing help</li> </ul> </li> </ul> | <b>60 Minutes</b> |
| 9:00 am -10:30 am | <b>Defining Lease Management Value Tables</b>   | <b>90 Minutes</b> |

|                     |  |                           |
|---------------------|--|---------------------------|
|                     | <ul style="list-style-type: none"> <li>▪ Creating a Lease Status</li> <li>▪ Creating a Lease Type</li> <li>▪ Creating a Date Type</li> <li>▪ Creating a Clause Type</li> <li>▪ Creating a Contact Type</li> <li>▪ Creating a Payment Period Type</li> <li>▪ Creating an Expense Type</li> <li>▪ Creating an Expense Category</li> <li>▪ Creating a Payment Type</li> <li>▪ Creating an Operating Company</li> </ul>  |                           |
| 10:30 am – 10:45 am | <b>Break</b>   | <b>15 Minutes</b>         |
| 10:45 am – 2:30 pm  | <b>Lease Management</b>  | <b>2 Hours 45 Minutes</b> |
| 1 Hour lunch 12-1   |  |                           |
|                     | <ul style="list-style-type: none"> <li>▪ Finding a Lease Record</li> <li>▪ Creating a Lease</li> <li>▪ Associating Structural Units to a Lease</li> <li>▪ Associating Business Units to a Lease</li> <li>▪ Adding Critical Lease Dates</li> <li>▪ Adding Escalators to a Lease</li> <li>▪ Adding a Contact to a Lease</li> <li>▪ Adding a Clause to a Lease</li> <li>▪ Adding an Amendment to a Lease</li> <li>▪ Adding a Sublease to a Lease</li> <li>▪ Creating a Payment</li> <li>▪ Associating an Existing eCenterOne Document to a Lease</li> <li>▪ Adding a New Document to a Lease</li> <li>▪ Managing a Lease Document</li> <li>▪ Adding Notes to a Lease</li> </ul> |                           |
| 2:30 pm 2:45 pm     | <b>Break</b>   | <b>15 Minutes</b>         |
| 2:45 pm – 4:00 pm   | <b>Miscellaneous Reports</b>   | <b>60 Minutes</b>         |

4:00 pm – 4:30 pm

**Review and Wrap-Up**

**30 Minutes**

- Question and Answer Session
  - Complete Evaluations
-