

CenterStone<sup>CS</sup>

eCenterOne

Operations  
Management  
Curriculum

CenterStone Software, Inc.  
239 South St.  
Hopkinton, MA 01748  
Telephone 508-435-1510  
Fax 508-435-1518

The software and subscription service described in this booklet is furnished under a license and subscription agreement and may be used only in accordance with the terms of those agreements.

All Rights Reserved

This publication and the software and subscription service it describes are protected by copyright and all rights are reserved. No part of this publication, the software or subscription service may be reproduced or transmitted by any means or in any form, without prior consent in writing from Centerstone Software, Inc.

THE INFORMATION IN THIS INSTRUCTIONAL DEMONSTRATION HAS BEEN CAREFULLY CHECKED AND IS BELIEVED TO BE ACCURATE. HOWEVER, CENTERSTONE SOFTWARE, INC. ASSUMES NO RESPONSIBILITY FOR ANY INACCURACIES, ERRORS OR OMISSIONS THAT MAY BE CONTAINED IN THIS INSTRUCTIONAL DEMONSTRATION. IN NO EVENT WILL CENTERSTONE SOFTWARE, INC. BE LIABLE FOR DIRECT, INDIRECT, SPECIAL, INCIDENTAL OR CONSEQUENTIAL DAMAGES RESULTING FROM ANY DEFECT OR OMISSION IN THIS INSTRUCTIONAL DEMONSTRATION, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

In the interest of continued product development, Centerstone Software, Inc. reserves the right to make improvements in this instructional demonstration and the products and services it describes at any time, without notice or obligation.

Centerstone™, e-Center One® and APPLIED FMS™ are the trademarks of Centerstone Software, Inc. WebEx® is a registered trademark of WebEx Communications, Inc. and Java® is a registered trademark of Sun Microsystems, Inc. Other brand and product names are trademarks and/or registered trademarks of their respective holders.

# Table of Contents

<b>Introduction .....</b>	<b>1</b>
<b>Training Objectives.....</b>	<b>1</b>
<b>Audience and Locations.....</b>	<b>1</b>
<b>Training Environment .....</b>	<b>1</b>
<b>Evaluation Strategy .....</b>	<b>2</b>
<b>Curriculum .....</b>	<b>Error! Bookmark not defined.</b>

## Curriculum

---

### Introduction

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

- Facility Planner

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. (Optional)
- 

## 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 Operations Management course that the Centerstone Educational Services team has identified as necessary for training for the (client name) team

## Value Propositions

- ❑ Provides users with a thorough, but flexible means to enter, track and report on the costs and progress of work orders within your company.
  - Included within this process is the ability to enter, track and report on service requests and preventative maintenance schedules within your company.

## Duration of Track

- ❑ 8 Hours

## Roles Covered by Track

- ❑ Facility Managers
- ❑ Facility Coordinators

8:00-9:00 am

Topic	Time
<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 -10:00 am	<b>Defining Operations Management Value Tables</b>	<b>60 Minutes</b>
	<ul style="list-style-type: none"> <li>▪ Creating/Updating a Service Request Status</li> <li>▪ Creating/Updating a Work Order Status</li> <li>▪ Creating Service Request Priorities</li> <li>▪ Creating Work Order Numbering</li> <li>▪ Creating Work Order Categories</li> <li>▪ Creating Work Order Job Types</li> <li>▪ Creating a Service Center</li> <li>▪ Creating an Expense Type</li> <li>▪ Creating a Billing Code</li> <li>▪ Creating a Service Code</li> <li>▪ Creating a Material Type</li> <li>▪ Creating Material Definitions</li> <li>▪ Creating Material Units of Measure</li> <li>▪ Creating a Project Type</li> <li>▪ Creating a Contact Type</li> <li>▪ Creating a Vendor Type</li> <li>▪ Adding Labor Service Providers               <ul style="list-style-type: none"> <li>○ Vendors</li> <li>○ Contacts</li> <li>○ Internal Resources</li> </ul> </li> </ul>	
10:00 am - 10:15 am	<b>Break</b>	<b>15 Minutes</b>
10:15 am – 11:15 am	<b>Service Requests</b>	<b>60 Minutes</b>
	<ul style="list-style-type: none"> <li>▪ Creating a Service Request (Not Mandatory)</li> <li>▪ Associating a Structural Unit to a Service Request</li> <li>▪ Associating Assets to a Service Request</li> <li>▪ Associating Employee (HR) Records to a Service Request</li> <li>▪ Associating Notes to a Service Request</li> <li>▪ Associating Electronic Files (documents) to a Service Request</li> <li>▪ Submitting a Service Request/Creating a Work Order from a Service Request</li> </ul>	

11:15 am – 2:00 pm (Lunch 1-2)	<b>Work Orders</b>	<b>1 hr 45 minutes</b>
	<ul style="list-style-type: none"> <li>▪ Viewing Work Orders (Created from an Approved Service Request)</li> <li>▪ Creating a Work Order (Work Order &gt; Attributes tab)</li> <li>▪ Associating Structural Units to a Work Order</li> <li>▪ Associating Assets to a Work Order</li> <li>▪ Associating Employee Records to a Work Order</li> <li>▪ Associating Labor Costs to a Work Order</li> <li>▪ Associating Material Costs to a Work Order</li> <li>▪ Associating Documents to a Work Order</li> <li>▪ Associating Tasks (Nested work order) to a Work Order</li> <li>▪ Associating Business Units to a Work Order               <ul style="list-style-type: none"> <li>○ Allows you to associate “charge back” percentages</li> </ul> </li> </ul>	
2:00 pm – 2:15 pm	Break	<b>15 Minutes</b>
2:15 pm – 3:00 pm	<b>Preventative Maintenance</b>	<b>45 Minutes</b>
	<ul style="list-style-type: none"> <li>▪ Creating a Preventative Maintenance Schedule</li> <li>▪ Creating a Preventative Maintenance Template</li> </ul>	
3:00 pm – 3:30 pm	<b>Templates</b>	<b>30 Minutes</b>
	<ul style="list-style-type: none"> <li>▪ Creating a Work Order Template</li> <li>▪ Creating an Email Template (Under SetUp)</li> </ul>	
3:30 pm – 4:30 pm	<b>Reports</b>	<b>60 Minutes</b>

- Service Requests by
  - Assets
  - Buildings
  - Floors
  - Sites
  
- Work Orders by
  - Asset Category
  - Assets
  - Assets and Buildings
  - Assets and Floors
  - Assets and Sites
  - Buildings
  - Contacts
  - Floors
  - Human Resource
  - Internal Labor
  - Sites
  - Vendors

4:30 pm – 5:00 pm

**Review and Wrap-Up**

**30 Minutes**

- Question and Answer Session
  - Complete Evaluations
-

