

Education Services

Summary of Offerings
eFront PEO/VC

Feb 13, 2020



Table of Contents

1. eLearning Programs	4
1.1.1. Online course fees	5
2. Certification.....	5
2.1. General features	5
2.1.1. Certification by module.....	5
2.1.2. Methodology	6
2.1.3. Target audience.....	6
2.2. Certification process	6
2.2.1. Initiation.....	6
2.2.2. Taking the certification exam.....	7
2.2.3. Issuing certificate.....	7
3. Appendix.....	9
3.1. Course description.....	9
3.1.1. Get started with eFront PEO/VC	9
3.1.2. eFront PEO/VC CRM.....	10
3.1.3. eFront PEO/VC Portfolio.....	11
3.1.4. eFront PEO/VC Fund-Investor	12
3.1.5. eFront PEO/VC Analytics	13
3.1.6. eFront PEO/VC Query Builder	14

1. Courses provided by Education Services








eFront provides online training on PEO/VC. The offerings provided are outlined in this document.

If you need a course which is not listed here, please, talk to your eFront point of contact.

To contact the Education Services team directly, please send an e-mail to education@efront.com.

Here is what we offer in a nutshell:

- Online courses covering all the core modules of eFront PEO/VC
- Each course has its own certification that is to be renewed every 2 years
- All the concepts and practices exposed in the training are based on the best practices
- The list of available courses with their format and duration is as follows:

Product	Course Name	Format	Estimated course duration (hours)
			eLearning
eFront PEO/VC	Get started with eFront PEO/VC		1
	eFront PEO/VC CRM		1
	eFront PEO/VC Portfolio		2
	eFront PEO/VC Fund-Investor		2
	eFront PEO/VC Analytics		2
	eFront PEO/VC Query Builder		2
			

1. eLearning Programs

eFront provides interactive eLearning courses authored in the latest release of Adobe Captivate. The courses are delivered as animated and narrated videos that explain how eFront applications work, accompanied with software demonstrations and interactive exercises which allow learners to practice their software skills.

The main characteristics of the eFront online courses are the following:

- **Relevant content** – important concepts are presented and explained, as well as hands-on ‘how to’ processes needed for mastering the application.
- **Interactivity** – learners are actively participating, rather than being passive observers. They are asked to complete a series of guided tasks throughout the course.
- **Strong business cases** – courses are rich in practical examples that help learners relate the presented concepts to the real-life needs of their organizations.

The eLearning courses are stand-alone courses that enable users to independently use essential features of eFront’s applications. They can be accessed through our Learning Management System (LMS). Our team will create the user account(s) and grant the access to the required eLearning course(s). Users can go through the courses at their own pace. They can also track their deadlines, progress, check the completed courses and grades.

Each course for eFront PEO/VC can be taken individually with no pre-requisites. However, if you don’t have any previous knowledge of the application, we recommend that you to go through the introductory course **Get Started with eFront PEO/VC** in order to become familiar with the basic objects and navigation through eFront PEO/VC.

1.1.1. Online course fees

The price of an eLearning course varies according to the complexity and the duration of the course. The access to a course is for a period of 6 months. The course price is per user.

Product	Course Name	Cost per user
eFront PEO/VC	Get started with eFront PEO/VC	100
	eFront PEO/VC CRM	300
	eFront PEO/VC Portfolio	500
	eFront PEO/VC Fund-Investor	500
	eFront PEO/VC Analytics	500
	eFront PEO/VC Query Builder	500

Discounts can be applied as follows:

Discounts to apply when the purchase order is greater than	Discount
20K	10%
40K	20%
60K	30%

2. Certification

As a result of eFront’s need to establish and maintain professional standards in the way our products are deployed, we have decided to launch a Certification program. This certification program will allow both eFront employees and third-party individuals such as our partners or customers to certify themselves on our software solutions.

2.1. General features

2.1.1. Certification by module

This certification program is managed at the module level within our products. Thus, allowing an individual to specialize in a particular solution. Each certification corresponds to a specific software version. In other words, as the product evolves it is possible that the certified individual will need to re-certify themselves on the module.

The certification program will continue to be enhanced with additional content supporting the certification on additional modules within our product catalog.

2.1.2. Methodology

The certification program is supported by our Learning Management System (LMS). An online certification exam is made available to confirm the requisite knowledge to be certified.

It is required to have completed an online course available within the eFront LMS in order to attempt certification on a module.

2.1.3. Target audience

As previously mentioned, the certification program is available to both eFront employees and external users of our software. For external users, the following must be considered:

- **eFront partners:** an up to date certification is required to achieve the status of Certified Partner.
- **eFront customers:** the certification program is optional but recommended to enforce knowledge of our products.

The certification is issued to the individual passing the certification exam and not to the employer of this individual. Therefore, the employer must meet the requirements at the employee level to maintain their certified status.

2.2. Certification process

2.2.1. Initiation

A certification is earned with the passing of the certification exam, this certification exam is available within our LMS. The LMS provides access to a variety of course material, some provide an opportunity for certification and some are for information/training purposes only. Therefore, the path to certification begins when the user is granted access to our LMS.

Note: a contract is required for any individual with intentions of obtaining certification. The required contract differs between our customers and partners:

- Customer: GTC
- Partner: Partnership Agreement

2.2.2. Taking the certification exam

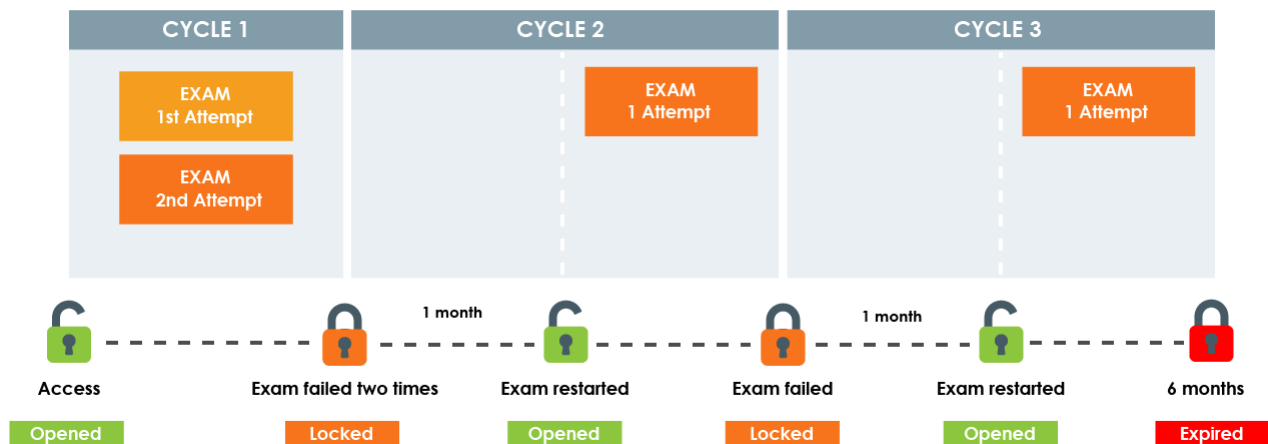
The certification exam is immediately made available to the user upon completion of certain online courses or classroom training. However, the users' failure of passing the exam could result in the locking of the certification exam. The behavior has been described below:

- **1st cycle:** the user will be given **two attempts** to pass the certification exam successfully. If the user is unable to pass the certification exam with these two attempts the certification exam will be locked for a period of 1 month.
- **2nd + cycle(s):** the user will be given **one attempt** to pass the certification exam successfully. If the user is unable to pass the certification exam, it will be locked for a period of 1 month.

The user will be allowed as many cycles as necessary within the 6-month period of access to the course in the LMS. Therefore, the longer the user requires to complete the course material the less time they have available to complete and successfully pass the corresponding certification exam.

Note: once completed the online course will always remain available throughout the entire 6-month period of access within the Learning History section on the LMS. The locking of the certification exam does not impact the access to the corresponding course material.

To illustrate the exam taking process and cycles, consider the illustration below:



2.2.3. Issuing certificate

The certificate provided upon the successful completion and passing of the certification exam is immediately made available within the LMS. The certificate itself is provided in a PDF format and is available for print/download. The certificate will provide the following information:

- Name of the certificate holder
- eFront module / course
- Software version
- Date of certification

If the user wishes to maintain a current certification they will be required to update their certification to correspond with the evolution of the software. If the course material remains unchanged between software versions, the certification can automatically be updated to the latest software version.

3. Appendix

3.1. Course description

3.1.1. Get started with eFront PEO/VC

INTRODUCTION OBJECTIVES AGENDA

By the end of this unit you should:

- Understand the positioning of eFront Invest.
- Understand the key features of eFront Invest.
- Know the different modules comprising eFront Invest.
- Be able to access the eFront Invest application.
- Know the different areas of the interface.
- Be able to navigate within the application using the interface options.
- Understand the purpose of data regions.
- Understand the organization of the main objects.

INTRODUCTION OBJECTIVES AGENDA

Section 1: Introduction to eFront PEO/VC

- Section 1.1: Introduction to eFront PEO/VC
- Section 1.2: Key features and benefits of eFront PEO/VC
- Section 1.3: Modules in eFront PEO/VC

Section 2: eFront PEO/VC User Interface

- Section 2.1: Logging in
- Section 2.2: The Homepage and General Navigation Options
- Section 2.3: Introduction to Navigating the Main Modules
- Section 2.4: Navigate Inside an Object

3.1.2. eFront PEO/VC CRM

INTRODUCTION

OBJECTIVES

AGENDA

By the end of this unit you should:

- Understand the basic concept of eFront PEO/VC CRM and how it connects to nearly all other areas of the application.
- Be able to navigate through the related interface areas and use the CRM features provided by eFront PEO/VC.
- Be able to create/manage contacts, and their respective tasks, notes, and activities.
- Be able to associate Contacts to other entities (Fund, Company, Investor, etc) in the system.

INTRODUCTION

OBJECTIVES

AGENDA

Section 1: Introduction

- Section 1.1: Introduction to eFront PEO/VC CRM

Section 2: Manage Contacts in eFront PEO/VC CRM

- Section 2.1: Contacts Management
- Section 2.2: Importing CRM Data from Excel

3.1.3. eFront PEO/VC Portfolio

INTRODUCTION

OBJECTIVES

AGENDA

By the end of this unit you should:

- Understand the basic concept of eFront PEO / VC Portfolio and its relationship to the Fund module.
- Be able to navigate through the related interface areas and use the Portfolio features provided by eFront PEO / VC.
- Be able to create new Portfolio Companies.
- Be able to manage the transaction history of your investment.
- Record ownership information via the Capitalization Table area.
- Track Static characteristics on the Profile Tab and Historical data points via the Report Card (KPI) screens.
- Understand the concept and features of Financial Statement data

INTRODUCTION

OBJECTIVES

AGENDA

Section 1: Introduction

- Section 1.1: Introduction to eFront PEO / VC Portfolio

Section 2: Manage Portfolio Investments in eFront PEO / VC - Part1

- Section 2.1: Navigation
- Section 2.2: Portfolio Management: Profile and Investment Transactions

Section 3: Manage Portfolio Investments in eFront PEO / VC - Part 2

- Section 3.1: Portfolio Management: Cap Tables, Financials, Report Cards, Board Members, and Securities
- Section 3.2: View of the Portfolio Schedule of Investments from a Fund
- Section 3.3: Overview of Portfolio Analysis Calculations

3.1.4. eFront PEO/VC Fund-Investor

INTRODUCTION

OBJECTIVES

AGENDA

By the end of this unit you should:

- Identify the basic concept of eFront PEO / VC Fund and Investor and the relationship between the two.
- Be able to navigate through the related interface areas and use the Investor and Fund features provided by eFront PEO / VC.
- Be able to create new Investors and Funds.
- Be able to manage the Attributes and Relationships as well as view other information from the Investor Profile.
- Identify the main functions of the Fund module such as Investor Relationships, Ratios, Transactions and Capital Accounts.
- Identify the basics of how to access the Trial Balance (GL).

INTRODUCTION

OBJECTIVES

AGENDA

Section 1: Introduction

- Section 1.1: Introduction to eFront PEO/VC Fund-Investor

Section 2: Manage Fund - Investor Modules and Functions in eFront PEO / VC

- Section 2.1: Investor Management
- Section 2.2: Fund Management

Section 3: eFront PEO/VC Fund-Investor Business Case

- Section 3.1: Business Case

3.1.5. eFront PEO/VC Analytics

INTRODUCTION

OBJECTIVES

AGENDA

By the end of this unit you should be able to:

- Identify the basic concept of eFront PEO/VC Analytics.
- Navigate through the related interface areas.
- Create new Scenarios for both Portfolio and Fund-Investor analysis.
- Update existing scenarios for changes in transaction events and new time periods.
- Identify the basic possibilities of configuring new calculations.

INTRODUCTION

OBJECTIVES

AGENDA

Section 1: Introduction

- Section 1.1: Introduction to eFront PEO/VC Analytics

Section 2: Analysis Setup and Features Review in eFront PEO/VC

- Section 2.1: Setting up and Managing Scenarios
- Section 2.2: Other Features
- Section 2.3: Analysis Configuration

Section 3: eFront PEO/VC Analytics Business Case

- Section 3.1: Practice Time

3.1.6. eFront PEO/VC Query Builder

INTRODUCTION

OBJECTIVES

AGENDA

By the end of this course you should be able to:

- Identify the basic concept of eFront PEO / VC Query Builder.
- Navigate through the related interface areas.
- Create new folders and queries.
- Identify where to find the data you are looking for when creating a query.
- Identify how you can use the information after a query is created.

INTRODUCTION

OBJECTIVES

AGENDA

Section 1: Introduction

- Section 1.1: Introduction to eFront PEO/VC Query Builder

Section 2: eFront PEO/VC Query Builder Setup and Features

- Section 2.1: Defining the Different Query Possibilities
- Section 2.2: Setting up and Managing Queries
- Section 2.3: Other Features

Section 3: eFront PEO/VC Query Builder Business Case

- Section 3.1: Practice Time