Lois

Training and Upskill

Modules

TOPIC/MODULE	CORE CONTENT	EST. TIME
System Configuration	Understanding of how access is assigned to users in the system and how this impacts the menu items and options available to users. Reference to client specific data included in the system (Hierarchy, Asset Categories, Lessors, Retail Calendar if applicable). Super User vs Normal User.	1.5–2hrs
Admin	Admin - users and lessor add/edit and delete, system parameters, system audit report.	
Lessees	Adding new lessees, divisions and subdivisions, extending access to users for the new lessees.	
Manual Add Lease & Workflow	Adding a lease manually in the system. Approval/rejection of the lease and associated emails generated. Lease status - active vs draft.	1.5–2hrs
Bulk Upload Leases & Workflow	Adding leases in bulk in the system using the template. Upload results file review and error message handling. Approval/rejection of the lease and associated emails generated. Adding documents and notes to the lease record.	
Lease Search and Edit, Running Reports	Lease status (draft, active, terminated) and other search options, lease search date sorting and export. Implications of lease status on edit options. Review of lease record tabs including audit trail, amortisation schedule, rentals, adding documents and notes. Accounting and standard report suite and report run parameters shown. IFRS 16 report run and tabs described as sample.	1hrs
In Life (Modifications) Changes – Manual	Applying in life changes to leases through the user interface, in life options described with a practical demo focused on in lifes most relevant to the client. Lease record audit trail and new amortisation schedule view. Undo of in lifes.	1–1.5hrs
In Life (Modifications) Changes – Bulk	Applying in life changes to leases using templates, in life options described with the practical demo focused on in lifes most relevant to the client. Email notifications indicating success or fail for ease. Lease record audit trail and new amortisation schedule view. Undo of in lifes.	

Quadrant®

TOPIC/MODULE	CORE CONTENT	EST. TIME
General Ledger User	Tagging leases to the ledger, extracting the journal csv file.	1–1.5hrs
General Ledger Admin	Ledger management, account code mapping, cost centre mapping, journal build, open and close periods.	
Month/year end process and reconciliation	Reconciliation process, in particular when there are back-dated in life changes.	1–1.5hrs
Notices	Distribution list setup - notices to go to individuals linked to end of lease notice date (31-90 days, 8-30 days, in next seven days).	1–1.5hrs
FX Table Management	Upload new rates, overwrite existing rate, export rates.	
IBR Table Management	IBR time buckets, populating template and uploading.	
IBR Benchmarking	Benchmark your IBR against 60,000 other data points stored in LOIS.	TBC
IBR Calculation	Best practice guidance on how to calculate your IBR accurately.	

Q&A recommended – allow for an additional 10 mins per 1 hour of training.
Reference to Zendesk Support materials will be made during training.

To find out more about LOIS training contact:
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