

# eMaint Boot Camp Training

## NEW USER TRAINING



Agenda is subject to change.

### Day 1: Work Order Management

8:30am - 9:00am	Introduction / Agenda Review
9:00am - 10:30am	<b>Navigating eMaint CMMS</b> <ul style="list-style-type: none"><li>● Understanding X4 Tabs, Tables and Features</li><li>● Managing the list view, filtering for Records and Saving Filters</li><li>● Understanding the Sidebar (Recent Items, Wall and Explorer)</li><li>● Creating Records in X4</li></ul>
10:30am - 11:00am	Hands-On Activity & Break
11:00am - 12:30pm	<b>Work Order Management</b> <ul style="list-style-type: none"><li>● Work Order Overview and Process</li><li>● Adding Work Orders - Work Order Record Detail View</li><li>● Work Request - Creation &amp; Approval</li><li>● Work Order Assignment, Charges and Close-Out</li></ul>
12:30pm - 1:30pm	Lunch Break
1:30pm - 2:30pm	<b>Work Order Management Cont'd.</b> <ul style="list-style-type: none"><li>● Work Order Related Tables</li><li>● Printing, Emailing and Signing Off on Work Orders</li><li>● Work Order Group Closeout and Group Printout</li></ul>
2:30pm - 3:00pm	Hands-On Activity & Break
3:00pm - 4:30pm	<b>Scheduler &amp; Custom Filters</b> <ul style="list-style-type: none"><li>● Understanding the Scheduler Tab</li><li>● Adding an Assignment to a Work Order through the Scheduler</li><li>● Re-assign Work Orders to Other Contacts</li><li>● Scheduler Settings and Creating Custom Filters</li></ul>
4:30pm - 5:00pm	Hands-On Activity & Recap

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## Day 2: Preventive Maintenance & Inventory

8:30am - 9:00am	Previous Day Recap & Agenda Review
9:00am - 10:30am	<b>PM Management</b> <ul style="list-style-type: none"><li>● Creating and understanding Calendar-Based PMs</li><li>● PM Tasks and Task Procedures</li><li>● Auto and manual PM generation</li><li>● Creating and understanding Meter-Based PM Schedules</li></ul>
10:30am - 11:00am	Hands-On Activity & Break
11:00am - 12:30pm	<b>PM Management Cont'd.</b> <ul style="list-style-type: none"><li>● Adding Meter Readings</li><li>● Copying PMs to multiple Assets and doing Mass Changes to PMs</li><li>● Advanced PM configuration: Skipping Days/Suppressing PMs/PM Nesting</li></ul>
12:30pm - 1:30pm	Lunch Break
1:30pm - 3:00pm	<b>Inventory Management</b> <ul style="list-style-type: none"><li>● Inventory Control Settings</li><li>● Creating Part Records and Associating Suppliers with Parts</li><li>● Part Adjustments, Viewing Inventory History and Barcode/QR code Labels</li><li>● Using the "Asset Related Parts" Feature (Bill of Materials)</li><li>● Issuing Parts to Work Orders</li><li>● Parts Requirements and PM Allocation</li><li>● Additional Inventory Feature: Parts Kitting</li></ul>
3:00pm - 3:30pm	Hands-On Activity & Break
3:30pm - 4:30pm	<b>Purchase Orders</b> <ul style="list-style-type: none"><li>● Creating a New Purchase Order and Adding Line Items to POs.</li><li>● Printing and Emailing POs</li><li>● Receiving Line Items</li><li>● How to create a PO through the Parts Re-order list</li></ul>
4:30pm - 5:00pm	Hands-On Activity & Break

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### Day 3: Reporting & System Administration

8:30am - 9:00am	Previous Day Recap & Agenda Review
9:00am - 10:30am	<b>Reports &amp; Dashboards</b> <ul style="list-style-type: none"><li>● Reporting overview and simple reports</li><li>● Filtering, Sorting and Group Band</li><li>● Joining tables</li><li>● Group By and Functions</li></ul>
10:30am - 11:00am	Hands-On Activity & Break
11:00am - 12:30pm	<b>Reports &amp; Dashboards Cont'd.</b> <ul style="list-style-type: none"><li>● Configuring reports as Graphs and Instruments</li><li>● Auto generating reports and the "Top X" function</li><li>● Dashboard Usage, Dashboard Examples and Creating Dashboard Tabs</li></ul>
12:30pm - 1:30pm	Lunch Break
1:30pm - 3:00pm	<b>Form Design and Document Storage</b> <ul style="list-style-type: none"><li>● Configuring Forms, Adding Existing Fields, Creating a New Field and Rearranging Fields on the Form</li><li>● Field Types, Properties and Extending Fields' lengths.</li><li>● Creating a New Form</li><li>● Document Storage Access, X4 Document Location and Creating Folders</li><li>● Uploading Single and Multiple Records, Adding Images and Files to Records</li><li>● Creating Document Fields and Previewing Files</li></ul>
3:00pm - 3:15pm	Break
3:15pm - 4:00pm	<b>eMaint MX Mobile</b> <ul style="list-style-type: none"><li>● MX Mobile overview</li><li>● WO Request creation and approval</li><li>● "My Work Orders" List and signing on/off WOs</li><li>● Adding Images into WOs and WO Requests</li><li>● Inventory: Making adjustments/Issuing parts/scanning barcodes</li><li>● Configuring Mobile Forms</li></ul>
4:00pm - 4:30pm	<b>Data Import and Data Export</b> <ul style="list-style-type: none"><li>● Preparing Spreadsheet and Importing New Data</li><li>● Restoring a Table (Undoing an Import)</li><li>● Exporting Data from X4</li></ul>
4:30pm - 5:00pm	Discussion / Q&A Session