

# eMaint Boot Camp Training

## WORK MANAGEMENT & PMs



Agenda is subject to change.

### Day 1: Introduction to eMaint CMMS

8:00am - 8:15am	Introduction - Agenda Review
8:15am - 9:15am	<b>New User Introduction</b> <ul style="list-style-type: none"><li>● Logging in</li><li>● General System Navigation</li><li>● Introduction to eMaint Tabs and Tables</li><li>● List Views</li><li>● Creation of Records: Assets and Contacts</li></ul>
9:15am - 9:45am	Hands-On Training
9:45am - 10:00am	Break
10:00am - 10:45am	<b>Work Order Management Introduction</b> <ul style="list-style-type: none"><li>● WO Entry</li><li>● WO List View</li><li>● WO Charges</li></ul>
10:45am - 11:15am	Hands-On Training
11:15am - 12:00pm	<b>Introduction to PM Schedules</b> <ul style="list-style-type: none"><li>● Basic PM Set-Up</li><li>● PM Generation (Manual)</li><li>● Task Library</li></ul>
12:00pm - 1:00pm	Lunch
1:00pm - 1:30pm	Hands-On Training
1:30pm - 2:00pm	<b>Inventory Introduction</b> <ul style="list-style-type: none"><li>● Creation of Parts Record</li><li>● Important Fields on the Parts Form</li><li>● Inventory Setup</li><li>● Making Adjustments to Inventory</li></ul>
2:00pm - 2:30pm	Hands-On Training
2:30pm - 2:45pm	Break
2:45pm - 4:00pm	<b>Reporting Introduction</b> <ul style="list-style-type: none"><li>● Report List</li><li>● Creation of Reports (Properties, Columns, Filters and Sorting)</li></ul>
4:00pm - 4:30pm	Hands-On Training
4:30pm - 5:00pm	Q&A

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### Day 2: Work Order Management

8:00am - 8:15am	Introduction - Agenda Review
8:15am - 10:15am	<b>Work Order Management (Level 2)</b> <ul style="list-style-type: none"><li>● WO Process Overview</li><li>● Work Order Requests (Requestor User x Approver)</li><li>● Related Tables: Charges Review, Procedures, Assignments &amp; Purchase (PO/WO Relationship)</li><li>● WO Close out (Individual and Group Close Out)</li><li>● WO Print Manager</li><li>● WO Management on MX Mobile</li></ul>
10:15am - 10:30am	Break
10:30am - 11:00am	Hands-On Training
11:00am - 11:30am	<b>Projects</b> <ul style="list-style-type: none"><li>● Project Setup</li><li>● Gantt Chart Configuration</li></ul>
11:30am - 12:00pm	Hands-On Training
12:00pm - 1:00pm	Lunch
1:00pm - 2:00pm	<b>Scheduler &amp; Custom Filters</b> <ul style="list-style-type: none"><li>● Viewing WO Assignments on Calendar View</li><li>● Assigning Work Through Scheduler</li><li>● Scheduler Settings</li><li>● Work Orders on Calendar View</li><li>● Custom Filter Setup (Contacts and WOs)</li></ul>
2:00pm - 2:30pm	Hands-On Training
2:30pm - 3:30pm	<b>Work Management Reporting</b> <ul style="list-style-type: none"><li>● Reviewing Existing WO Reports</li><li>● Creation of Useful WO Reports: Top 10 Assets with the Most Charges, Total WO Charges by Employee in a Date Range &amp; Past Due Work Orders</li><li>● WO Dashboard Widgets: Sign On/Sign Off Wizard, Sign On Tracking &amp; My Open WOs</li></ul>
3:30pm - 3:45pm	Break
3:45pm - 4:15pm	Hands-On Training
4:15pm - 5:00pm	<b>Additional Work Management Features and Q&amp;A</b> <ul style="list-style-type: none"><li>● Time Card</li><li>● Condition Monitoring</li></ul>

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### Day 3: PM Management

8:00am - 8:15am	Introduction - Agenda Review
8:15am - 09:15am	<b>PM Management (Level 2)</b> <ul style="list-style-type: none"><li>● PM Setup Overview</li><li>● Important Fields on the PM Form (Nesting Fields, PM Suppression)</li><li>● PM Related Tables</li><li>● PM Settings (Automatic Generation and Email Options)</li><li>● Task Library (Group Task)</li><li>● PM Distribution</li></ul>
09:15am - 09:45am	Hands-On Training
9:45am - 10:00am	Break
10:00am - 10:45am	<b>Meter Based PMs &amp; Meter Readings</b> <ul style="list-style-type: none"><li>● Overview</li><li>● Entry Options (Manual, Import, Mobile, Email and Cond. Monitoring)</li><li>● Meter Manager</li></ul>
10:45am - 11:15am	Hands-On Training
11:15am - 12:00pm	<b>PM Manager Tools &amp; PM Route Manager</b> <ul style="list-style-type: none"><li>● PM Manager Options: Filtering Records, Mass Change on PMs, PM Due Date Manager, Next PM Date Adjustments &amp; Annual PM Projection</li><li>● Using PM Route Manager</li></ul>
12:00pm - 1:00pm	Lunch
1:00pm - 1:30pm	Hands-On Training
1:30pm - 2:00pm	<b>PM Management Workflows</b> <ul style="list-style-type: none"><li>● Send email to supervisor when Safety PM generates</li><li>● Fill out "Scheduled Date" automatically on PM WOs</li></ul>
2:00pm - 2:30pm	Hands-On Training
2:30pm - 2:45pm	Break
2:45pm - 3:45pm	<b>PM Management Reporting</b> <ul style="list-style-type: none"><li>● Reviewing Existing PM Reports</li><li>● Creating Useful PM Reports: Open PM WOs by Employee &amp; PM Completion (Completed On Time?)</li><li>● PM Work Projection Report (Dashboard Widget)</li></ul>
3:45pm - 4:15pm	Hands-On Training
4:15pm - 4:45pm	<b>Scheduler (PMs and Projections)</b> <ul style="list-style-type: none"><li>● PM Projection on Calendar View</li><li>● PM Projection Filter Settings</li></ul>
4:45pm - 5:00pm	Q&A

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