

eMaint Boot Camp Training

SYSTEM ADMINISTRATION



Agenda is subject to change.



Day 1: Introduction to System Administration

8:00am - 8:15am	Introduction - Agenda Review
8:15am - 9:45am	New User Intro <ul style="list-style-type: none">● Logging in● General System Navigation● Introduction to X4 Tabs, Tables and Features● List View Management (Saving Filters & Setting up Permanent Filters)● Creation of Records: Assets and Contacts● Explorer Setup
9:45am - 10:00am	Break
10:00am - 10:30am	Hands-On Training
10:30am - 12:00pm	Introduction to Work Orders and PM Schedules <ul style="list-style-type: none">● Work Order Process (WO entry, WO list, WO charges & WO Closeout)● Work Order Requests (Request Approval)● WO Group Close Out● Basic PM Set-Up● PM Generation (Manual)
12:15pm - 1:00pm	Lunch
1:00pm - 1:30pm	Hands-On Training
1:30pm - 2:30pm	Inventory Management Intro <ul style="list-style-type: none">● Creation of Parts Record● Associating Suppliers to Parts● Making Adjustments to Inventory
2:30pm - 2:45pm	Break
2:45pm - 4:00pm	User Administration and Administrator Features <ul style="list-style-type: none">● User Types & Setting Up User Rights● Table names● Copying Rights to other Users● Changing Usernames and Passwords● Remove Deleted Records● Recovering Deleted Records● User Statistics Report
4:00pm - 4:30pm	Introduction to MX Mobile <ul style="list-style-type: none">● Overview of MX Mobile Interface● Searching for Records● Managing Work Orders and Inventory
4:30pm - 5:00pm	Q&A



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Day 2: Account Settings & Customization

8:00am - 8:15am	Introduction - Agenda Review
8:15am - 9:45am	My Account <ul style="list-style-type: none"> ● Username/ Password Information ● Administrator System Settings ● Customizing Header and Footer of WO Print Out
9:45am - 10:00am	Break
10:00am - 11:30am	Form Design <ul style="list-style-type: none"> ● Overview of Form Design ● Creating New Fields & Editing Existing Fields ● Rearranging fields on the Form ● Changing the Appearance of Fields ● Managing Columns on List View ● Managing Document Storage and creating Document Fields ● Creating and Configuring MX Mobile Forms ● Creating New Related Tables
11:30am - 12:15pm	Hands On
12:15pm - 1:00pm	Lunch
1:00pm - 1:30pm	Lookup Creation <ul style="list-style-type: none"> ● Values Lookup ● Table Lookup (Using existing tables and Creating new Table): Drop-Down, Pop-Up, Drop-Down/Pop-Up Combo & List (Field Map Setup) ● Drill-Down Lookup Setup
1:30pm - 2:00pm	Hands-On Training
2:00pm - 3:00pm	Reporting With X4 <ul style="list-style-type: none"> ● Report List ● Creation of Reports (Properties, Columns, Filters and Sorting) ● Group Band
3:00pm - 3:15pm	Break
3:15pm - 3:45pm	Hands-On Training
3:45pm - 4:30pm	eMaint University (EU) <ul style="list-style-type: none"> ● Navigating eMaint University (Tabs and Buttons) ● The different roles roles ● Courses and Modules ● Assigning Courses to Other Users ● Access reports
4:30pm - 5:00pm	Q&A

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Day 3: Advanced Administrator Features

8:00am - 8:15am	Introduction / Agenda Review
8:15am - 9:45am	Workflow Manager <ul style="list-style-type: none">● Navigating the Workflow Manager● Workflow creation and Configuration● Rules, Conditions and Actions● Creation of Useful Workflows● Workflow Email Template
9:45am - 10:00am	Break
10:00am - 10:30am	Hands-On Training
10:30am - 11:30am	Data Dictionary <ul style="list-style-type: none">● Adding fields to the Close out Screen● Rearranging Fields on the closeout screen● Turning a True/False Field (Logic) into a Checkbox● Hiding Fields from Specific Users● Weblink Setup● Expanding Form Row● Adding Help Text
11:30pm - 12:00pm	Hands-On Training
12:00pm - 1:00pm	Lunch
1:00pm - 2:45pm	Advanced Reporting and Dashboard <ul style="list-style-type: none">● Setup Reports to be auto-generated● Joining Tables● Advanced Filters● Grouping feature● Creating Calculated fields● Graphs and Instruments● Publishing Reports● Dashboard Tabs, Properties and Widgets
2:45pm - 3:00pm	Break
3:00pm - 3:30pm	Hands-On Training
3:30pm - 4:00pm	Data Import and Data Export <ul style="list-style-type: none">● Reviewing Spreadsheets Before Importing● Importing New Records Into the System● Updating Existing Records● Exporting Data
4:00pm - 4:30pm	Hands-On Training
4:30pm - 5:00pm	Q&A



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