

eMaint Boot Camp Training

INVENTORY & PURCHASING



Agenda is subject to change.



Day 1: Introduction to Inventory Management

8:00am - 8:15am	Introduction - Agenda Review
8:15am - 9:15am	New User Intro <ul style="list-style-type: none">● Logging in● General System Navigation● Introduction to eMaint Tabs and Tables● List Views● Creation of Records: Assets and Contacts
9:15am - 9:45am	Hands-On Training
9:45am - 10:00am	Break
10:00am - 11:30am	Introduction to Work Orders & PM Schedules <ul style="list-style-type: none">● Work Order Process (WO entry, WO list, WO charges and WO Closeout)● Work Order Requests (Request Approval/Rejection)● Basic PM Set-Up● PM Parts Related Table● PM Generation (Manual)
11:30am - 12:15am	Hands-On Training
12:15pm - 1:15pm	Lunch
1:15pm - 2:45pm	Inventory Management <ul style="list-style-type: none">● Inventory Setup: Creating Part Records, Overview of Important Fields on the Parts Form & Using the Item Suppliers Table● Making Adjustments to Inventory● Using "Related Assets" Table (Bill of Materials)● WO Part Charges (Individual and/ or using "Add Quick" option)● Parts Reorder List● Allocating Parts to WO's● Inventory Settings
2:45pm - 3:00pm	Break
3:00pm - 3:30pm	Hands-On Training
3:30pm - 4:00pm	Additional Inventory Features <ul style="list-style-type: none">● Parts Kitting● Material Request
4:00pm - 4:30pm	Hands-On Training
4:30pm - 5:00pm	Q&A

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Day 2: Purchasing & Requisitioning

8:00am - 8:15am	Introduction / Agenda Review
8:15am - 9:45am	Purchasing <ul style="list-style-type: none">● Creating New POs● Adding Line Items to POs● Receiving Line Items● Importance of Item Suppliers Table● Purchasing Center
9:45am - 10:00am	Break
10:00am - 10:30	Hands-On Training
10:30am - 11:30am	Requisitioning Setup <ul style="list-style-type: none">● Creating Approval Groups● Adding Approval Group Users (Requisitioner and Approver)● Adding Accounts to the Groups● Setting Up User Permissions● Global Requisition Settings
11:30am - 12:00pm	Hands-On Training
12:00pm - 1:00pm	Lunch
1:00pm - 2:30pm	Requisitioning Process <ul style="list-style-type: none">● Setup Review● Requisition Process (Standard and Stock)● Creating and Submitting Requisitions● Requisition Approval● Turning Approved Requisitions into POs
2:30pm - 3:00pm	Hands-On Training
3:00pm - 3:15pm	Break
3:15pm - 3:30pm	Real Life Simulation <ul style="list-style-type: none">● Group activity that will simulate the Requisition process considering the different roles in the company
3:30pm - 4:30pm	Multi Inventory Location <ul style="list-style-type: none">● Process of activating Multi Inventory Location● Setting up new locations in the system● Creating Parts and defining on-hand amounts for each location● Inventory transactions (adjustments, WO charges & location transfers)● Reorder parts per location using the Stock Requisition system● Purchase Orders (Multi Inventory Location)
4:30pm - 5:00pm	Additional Inventory/Purchasing Features and Q&A



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	<ul style="list-style-type: none">● Inventory Methods● Punch out
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Day 3: MX Mobile & Barcoding

8:00am - 8:15am	Introduction / Agenda Review
8:15am - 10:15am	Reporting In eMaint CMMS <ul style="list-style-type: none">● Report List● Reviewing Existing Inventory & PO Reports● Inventory Labels Report● Creation of Reports (Properties, Columns, Filters and Sorting)● Joining Tables● Creation of Parts Usage Report● Inventory Value Widget & Valuation Report
10:15am - 10:30am	Break
10:30am - 11:00am	Hands-On Training
11:00am - 12:00pm	Inventory Data Import <ul style="list-style-type: none">● Preparing Spreadsheet & Importing Parts into eMaint● Associating Parts with Suppliers through Import● Making Parts Adjustments with the Data Import Tool● Importing Process for Accounts with Multi Inventory Location● Importing POs into the system
12:00pm - 1:00pm	Lunch
1:00pm - 1:30pm	Hands-On Training
1:30pm - 2:15pm	MX Mobile <ul style="list-style-type: none">● Overview of MX Mobile Interface● Searching for Records● Managing Inventory: Issuing Parts to WOs, Returning Parts to Inventory, Making Part Adjustments● Managing WO Charges● Embedding Images into WO Requests● Configuring MX Mobile Forms
2:15pm - 2:45pm	Hands-On Training
2:45pm - 3:00pm	Break
3:00pm - 3:45pm	Hardware & Barcoding (Experience Center Visit) <ul style="list-style-type: none">● Demonstration of Devices and Operating Systems● Discussion of Barcoding in eMaint● Barcode Devices and Barcoding Apps● Demonstration of eMaint Features with Different Devices
3:45pm - 4:30pm	Hands-On Training With Devices



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4:30pm - 5:00pm

Q&A