

eMaint Boot Camp Training

System Administration



Agenda is subject to change.

Day 1: Introduction to System Administration

8:00 am - 8:15 am	Introduction & Agenda Review
8:15 am - 9:45 am	New User Introduction <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
9:45 am - 10:00 am	Break
10:00 am - 10:30 am	Hands - On
10:30 am - 12:00 pm	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)
12:00 pm - 1:00 pm	Lunch
1:00 pm - 1:30 pm	Hands - On
1:30 pm - 2:30 pm	Inventory Management Introduction <ul style="list-style-type: none"> ● Creation of Parts Record ● Associating Suppliers to Parts ● Making Adjustments to Inventory
2:30 pm - 2:45 pm	Break
2:45 pm - 4:00 pm	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

	<ul style="list-style-type: none"> ● Remove Deleted Records ● Recovering Deleted Records ● User Statistics Report
4:00 pm - 4:30 pm	Introduction to MX Mobile <ul style="list-style-type: none"> ● Overview of MX Mobile Interface ● Searching for Records ● Managing Work Orders and Inventory
4:30 pm - 5:00 pm	Q&A

Day 2: Account Settings and Customization

8:00 am - 8:15 am	Introduction & Agenda Review
8:15 am - 9:45 am	My Account <ul style="list-style-type: none"> ● Username/ Password Information ● Administrator System Settings ● Customizing Header and Footer of WO Print Out
9:45 am - 10:00 am	Break
10:00 am - 11:30 am	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
11:30 am - 12:15 pm	Hands - On
12:15 pm - 1:00 pm	Lunch
1:00 pm - 1:30 pm	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
1:30 pm - 2:00 pm	Hands - On
2:00 pm - 3:00 pm	Reporting With X4 <ul style="list-style-type: none"> ● Report List

	<ul style="list-style-type: none"> • Creation of Reports (Properties, Columns, Filters and Sorting) • Group Band
3:00 pm - 3:15 pm	Break
3:15 pm - 3:45 pm	Hands - On
3:45 pm - 4:30 pm	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
4:30 pm - 5:00 pm	Q&A

Day 3: Advanced Administrator Features

8:00 am - 8:15 am	Introduction & Agenda Review
8:15 am - 9:45 am	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
9:45 am - 10:00 am	Break
10:00 am - 10:30 am	Hands - On
10:30 am - 11:30 am	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
11:30 am - 12:00 pm	Hands - On
12:00 pm - 1:00 pm	Lunch
1:00 pm - 2:45 pm	Advanced Reporting and Dashboard <ul style="list-style-type: none"> • Setup Reports to be auto-generated • Joining Tables

	<ul style="list-style-type: none"> ● Advanced Filters ● Grouping feature ● Creating Calculated fields ● Graphs and Instruments ● Publishing Reports ● Dashboard Tabs, Properties and Widgets
2:45 pm - 3:00 pm	Break
3:00 pm - 3:30 pm	Hands - On
3:30 pm - 4:00 pm	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
4:00 pm - 4:30 pm	Hands - On
4:30 pm - 5:00 pm	Q&A