

eMaint Boot Camp Training

X5 Beyond the Basics

Agenda is subject to change.



Day 1: Introduction to eMaint X5

8:30 am - 9:00 am	Introduction & Agenda Review
9:30 am - 10:30 am	Introduction to X5 <ul style="list-style-type: none"> ● Overview of X5 Key features ● Logging in ● Profile Settings ● General System Navigation ● Introduction to X5 Tabs & List Views
10:30 am - 10:45 am	Break
10:45 am - 11:00 am	Hands-On Exercises
11:00 am - 11:30 am	X5 Terminology, System Structure & Data Structure <ul style="list-style-type: none"> ● System Structure (Entities vs References) ● Data Structure (Explorer Setup) ● Creation of Records ● Asset Hierarchy ● Assets & Related Tables / Contacts & Related Tables
11:30 am - 12:30 pm	WO Management (Level 1) <ul style="list-style-type: none"> ● Work order process ● How to create WOs ● Adding charges ● Completing and closing WOs
12:30 pm - 1:30 pm	Lunch
1:30 pm - 1:45 pm	Hands-On Exercises
1:45 pm - 2:30 pm	Work Request Process <ul style="list-style-type: none"> ● WO Request process (requester user vs request link) ● Creating WO requests from QR codes
2:30 pm - 2:45 pm	Hands-On Exercises
2:45 pm - 3:00 pm	Break
3:00 pm - 3:45 pm	PM Management - Level 1 (Calendar Based PMs)

	<ul style="list-style-type: none"> ● Single Asset PMs ● Multiple Asset PMs (Single PM schedule with Multiple Assets, each with their own generation dates > Different WOs) ● Multiple Asset PMs (PMs for Parent Assets - Rounds) ● PM Generation ● PM Nesting ● PM Suppression
3:45 pm - 4:00 pm	Break
4:00 - 4:30 pm	Hands-On Exercises / Q&A

Day 2: Beyond the Basics (Inventory & Barcoding, Work Orders & PMs)

8:30 am - 8:45 am	Agenda Review
8:45 am - 9:30 am	Inventory Management & Purchasing <ul style="list-style-type: none"> ● Creation of Parts Record ● Defining Suppliers ● Part Location/ Stock Item setup ● Making Adjustments to Inventory ● Purchase Order Creation ● Receiving Parts
9:30 am - 9:45 am	Hands-On Exercises
9:45 am - 10:30 am	Barcoding in eMaint <ul style="list-style-type: none"> ● Overview of Barcoding in eMaint ● Overview of Barcode Devices and Barcoding Apps
10:30 am - 10:45 am	Break
10:45 am - 11:30 am	Work Order Management (Level 2) <ul style="list-style-type: none"> ● Follow up WOs ● Demonstration of WO Related Tables ● Setup WO List & Explorer to Manage WOs ● Defining Columns ● Setting Up Filters on the listview ● Projects
11:30 am - 12:00 pm	Hands-On Exercises
12:00 pm - 1:00 pm	Lunch
1:00 pm - 1:30 pm	Task Library <ul style="list-style-type: none"> ● Building your Task Library ● Task Procedures > PM Procedures > WO Procedures
1:30 - 1:45 pm	Hands-On Exercises
1:45 pm - 2:30 pm	Meter Based PMs & Meter Readings <ul style="list-style-type: none"> ● Single Asset PMs (Single and multiple Meter types) ● Meter Type Setup (References) ● Asset Meter Setup (Asset Record)

	<ul style="list-style-type: none"> ● Overview on Meter Based PMs ● Enter Meter Readings (Manual and Import) ● Setting Up Filters on listview/ Explorer Setup
2:30 pm - 2:45 pm	Break
2:45 pm - 3:00 pm	Hands-On Exercises
3:00 pm - 3:30 pm	Calendar & Scheduler <ul style="list-style-type: none"> ● Overview of Calendars and its Relationship with Records ● Overview of X5 Scheduler
3:30 pm - 4:15 pm	Introduction to Reporting <ul style="list-style-type: none"> ● Basics of Report Creation: Table selection, Output Columns, Filter setup, Sorting Records, etc
4:15 pm - 4:30 pm	Q&A

Day 3: Beyond the Basics (System Administration)

8:30 am - 8:45 am	Agenda Review
8:45 am - 9:45 am	Administrative Features/User Management <ul style="list-style-type: none"> ● Overview of Account Settings ● Sites, Cultures & Currencies ● User Permissions & User Roles
9:45 am - 10:00 am	Break
10:00 am - 11:00 am	Form Design <ul style="list-style-type: none"> ● Overview of Form Design in X5 (Entities, Forms and References) <u>Forms</u> <ul style="list-style-type: none"> ● Creating New Fields & Editing Existing Fields ● Rearranging fields on the Form ● System Translations ● Managing Columns on List View ● Managing Documents and creating Document Fields <u>References & Entities</u> <ul style="list-style-type: none"> ● Creating New References & creating Lookup fields ● Creating Brand new entities
11:00 am - 11:30 am	Hands-On Exercises
11:30 am - 12:00 pm	X5 Training and Networking Tools <u>eMaint University</u> <ul style="list-style-type: none"> ● Navigating eMaint University (Tabs and Buttons) ● The different roles ● Courses and Modules Assigning Courses to Other Users <u>Success Portal</u> <ul style="list-style-type: none"> ● Navigating the Portal and accessing articles ● Idea Portal ● Support Tickets
12:00 pm - 1:00 pm	Lunch

1:00 pm - 2:00 pm	Rules & Email Templates <ul style="list-style-type: none"> ● Rules Setup (Send Email Notifications & Auto-populate fields) ● Creating Email Templates
2:00 pm - 2:15 pm	Hands-On Exercises
2:15 pm - 3:00 pm	Data Import & Export <ul style="list-style-type: none"> ● Import Data Overview ● Spreadsheet prep & Data Import in X5 (Contacts & Assets) ● Rotating Shifts with Data Import ● Data Export
3:00 pm - 3:15 pm	Break
3:15 pm - 4:15 pm	Advanced Reporting, Graphs & Dashboards <ul style="list-style-type: none"> ● Auto Generating Reports ● Advanced Filters ● Joining Tables in a Report ● Grouping Feature ● Building your Dashboards (Dashboard 2.0 - Alpha)
4:15 pm - 4:30 pm	Hands-On Exercises / Q&A