eMaint Boot Camp Training
Inventory & Purchasing

Agenda is subject to change.

Things to know:

- In an effort to accommodate attendees in different time zones, our remote bootcamps start at **9 am EST.**
- The duration of the training is seven and a half hours per day. These are the start and end times on your time zone:
  - Central: **8:00 am** - **3:30 pm**
  - Mountain: **7:00 am** - **2:30 pm**
  - Pacific: **6:00 am** - **1:30 pm**

📋 Day 1: Introduction to Inventory Management

Time	Topic
9:00am - 9:15am	Introduction - Agenda Review
9:15am - 10:15am	**New User Introduction** • Logging in • General System Navigation • Introduction to X4 Tabs and Tables • List Views • Creation of Records: Assets and Contacts
10:15am - 10:30am	Break/ Hands-On
10:30am - 11:30am	**Introduction to Work Orders & PM Schedules** • 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 - 11:45am	Hands-On
11:45am - 1:00pm	Lunch
1:00pm - 2:00pm	**Inventory Management** • Inventory Setup: Creating Part Records, Overview of Important Fields 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
2:00pm - 2:30pm	Hands-on
2:30pm - 3:15pm	**Additional Inventory Features** • Parts Kitting • Material Request
3:15pm - 4:00pm	**Group Activity/Test your knowledge/Q&A**

Day 2: Purchasing and Requisitioning

9:00am - 9:15am	Introduction - Agenda Review
9:15am - 10:15am	**Purchasing** • Creating New POs • Adding Line Items to POs • Receiving Line Items • Importance of Item Suppliers Table • Purchasing Center
10:15am - 10:30am	Break/ Hands-On
10:30am - 11:30am	**Requisitioning Setup** • Creating Approval Groups • Adding Approval Group Users (Requisitioner and Approver) • Adding Accounts to the Groups • Setting Up User Permissions • Global Requisition Settings
11:00am - 11:15am	Hands on
11:15am - 11:45am	Group Activity
11:45am - 1:00pm	Lunch
1:00pm -2:00pm	**Requisitioning Process** • Setup Review • Requisition Process (Standard and Stock) • Creating and Submitting Requisitions • Requisition Approval • Turning Approved Requisitions into POs
2:00pm - 2:15pm	Break/Hands-On
2:15pm - 3:15pm	**Multi-Inventory Location** • 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)

3:15pm - 4:00pm	Hands On/Q&A

📋 Day 3: MX Mobile and Barcoding

9:00am - 9:15am	Introduction - Agenda Review
9:15am - 10:15am	**Reporting In eMaint X4** • 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
10:15am - 10:30am	Break/ Hands-On
10:30am - 11:30am	**Inventory Data Import** • Preparing Spreadsheet & Importing Parts • 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
11:30am - 11:45am	**Group Activity/Test your knowledge**
11:45am - 1:00pm	Lunch
1:00pm - 2:00pm	**MX Mobile** • Overview of MX Mobile Interface • Searching for Records • Meter Manager • 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
2:00pm - 2:15pm	Break/ Hands-On
2:15pm - 3:15pm	**Hardware & Barcoding (Experience Center Visit)** - Demonstration of Devices and Operating Systems - Discussion of Barcoding in eMaint - Barcode Devices and Barcoding Apps - Demonstration of eMaint Features with Different Devices
3:15pm - 4:00pm	Hands-On/Q&A