eMaint Boot Camp Training

WM & PMs + Reports & Dashboards

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 eMaint CMMS

9:00am - 9:15am	Introduction - Agenda Review
9:15am - 10:00am	**New User Introduction** • Logging in • General System Navigation • Introduction to X4 Tabs and Tables • List Views • Creation of Records: Assets and Contacts
10:00am - 10:15am	Break/ Hands-On
10:15am - 11:00am	**Introduction to Work Order Management** • WO Entry • WO List View • WO Charges • Asset History
11:00am - 11:30am	**Introduction to PM Schedules** • Basic PM Set-Up • PM Generation (Manual)
11:30am - 11:45am	Group Activity/Hands-On
11:45am - 1:00pm	**Lunch**
1:00pm - 1:45pm	**Introduction to Inventory** • Creation of Parts Record • Important Fields on the Parts Form • Inventory Setup • Making Adjustments to Inventory
1:45pm - 2:00pm	Break/ Hands-On

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2:00pm - 2:45pm	**Scheduler & Custom Filters** • Viewing WO Assignments on Calendar View • Assigning Work Through Scheduler • Scheduler Settings • Work Orders on Calendar View • Custom Filter Setup (Contacts and WOs)
2:45pm - 3:00pm	Break/ Hands-On
3:00pm - 3:45pm	**Group Activity/Test your knowledge**
3:45pm - 4:30pm	**Q&A**

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Day 2: Work Order Management

9:00am - 9:15am	Introduction - Agenda Review
9:15am - 10:00am	**Work Order Request & Asset Reservation Request** • Work Order Requests (Requestor User x Approver) • Asset Reservation Process (Requestor User x Approver) • Request Account Settings
10:00am - 10:15am	Break/ Hands-On
10:15am - 11:00am	**Work Order Management (Level 2)** • WO Process Overview • Related Tables: Charges Review, Procedures, Assignments & Purchase (PO/WO Relationship) • WO Permit • Work Order Management Tools (Mass Change, Explorer setup. Group Close out, Group Print out.) • Work Order Account Settings
11:00am - 11:15am	Break/ Hands-On
11:15am-11:45am	**WO Management on MX Mobile and X4 Offline App** • 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
11:45am - 1:00pm	Lunch
1:00pm - 1:45am	**Group Activity/Test your knowledge**

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1:45pm - 2:00pm	**Projects** • Project Setup • Gantt Chart Configuration
2:00pm - 2:30pm	Break/ Hands-On
2:30pm - 3:00pm	**Condition Monitoring** • Learning the setup process • Creating monitor classes and points • Associating your classes and points with assets • Entering readings & Analyzing your data
3:30pm-4:00pm	**Group Activity/Test your knowledge**
4:00pm - 4:30pm	**Q&A**

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Day 3: PM Management

9:00am - 9:15am	Introduction - Agenda Review
9:15am - 10:00am	**Task Library** • Building your Task Library (the two methods) • Publishing Tasks • Task Procedures > PM Procedures > WO Procedures
10:00am - 10:15am	Break/ Hands-On
10:15am - 11:00am	**PM Management (Level 2)** • PM Setup Overview (Calendar based) • Nesting PMs • PM Suppression • PM Parts Allocation • PM Settings (Automatic Generation and Email Options)
11:00am - 11:15am	Break/ Hands-On
11:15am - 11:45am	**Meter Based PMs & Meter Readings** • Overview • Entry Options (Manual, Import, Mobile, Email and Cond. Monitoring) • Meter Manager
11:45am - 1:00pm	Lunch
1:00pm - 1:45pm	**Group Activity/Test your knowledge**
1:45pm - 2:30pm	**PM Management Tools** • Viewing Asset information on PM List / Explorer Setup • PM Manager Options: Filtering Records, Mass Change on PMs, PM

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	Due Date Manager, Next PM Date Adjustments & Annual PM Projection • PM Distribution
2:30pm - 3:00pm	Break/ Hands-On
3:00pm - 3:45pm	**Reporting in X4 (Work Order & PM Reports)** • Introduction to Reporting Module / Report Creation • Review of Existing WO and PM Reports • Group Banding • Creation of Useful WO and PM Reports: Open WOs by Employee, Upcoming PM Schedules, etc
3:45pm - 4:30pm	**Q&A/Group Activity/Test your knowledge**

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Day 4: Reports & Dashboards

9:00am - 9:15am	Introduction - Agenda Review
9:15am - 10:00am	**Report Creation (Beginner)** • Report List • Basics of Report Creation: Report Properties, Output Columns, Basic Filters, Sorting Records, Group Band
10:00am - 10:15am	Break/ Hands-On
10:15am - 11:00am	**Report Creation (Intermediate)** • Auto Generating Reports • Advanced Filters • Joining Tables in a Report • Grouping Feature • Report Functions • Top X Report Feature
11:00am - 11:30am	Hands-On
11:30am - 11:45am	**Group Activity/Test your knowledge**
11:45pm - 1:00pm	Lunch
1:00am - 1:30am	**Calculated Fields in Reports (Advanced)** • Definition and Basic Walk Through • Creation of Calculated Fields • Calculated Field Functions
1:30am - 1:45pm	Hands-on

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1:45pm - 2:45pm	**Graphs, Instruments & Dashboard (Expert)** • Graphs, Instruments & Dashboard (Expert) • Instrument Setup • Dashboard Tabs and Properties • Publishing Reports
2:45pm - 3:00pm	Break/ Hands-On
3:00pm - 4:30pm	**Additional Report Discussion** • Reports Q&A