

eMaint Boot Camp Training

System Administration



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 System Administration

9:00am - 9:15am	Introduction - Agenda Review
9:15am - 10:00am	New User Introduction <ul style="list-style-type: none"> ● Logging in ● General System Navigation ● Introduction to X4 Tabs and Tables ● List Views ● Creation of Records: Assets and Contacts ● Explorer Setup
10:00am - 10:30am	Break/ Hands-On
10:30am - 11:30am	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)
11:30am - 11:45am	Hands-On
11:45am - 1:00pm	Lunch
1:00pm - 1:15pm	Group Activity/Test your knowledge
1:15pm - 1:45pm	Inventory Management Introduction <ul style="list-style-type: none"> ● Creation of Parts Record ● Associating Suppliers to Parts ● Making Adjustments to Inventory
1:45pm - 2:00pm	Hands-on
2:00pm - 2:15pm	Break

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2:15pm - 3:00pm	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 • Remove Deleted Records • Recovering Deleted Records
3:00pm - 3:15pm	Break/ Hands-On
3:15pm - 3:45pm	Introduction to MX Mobile <ul style="list-style-type: none"> • Overview of MX Mobile Interface • Searching for Records • Managing Work Orders and Inventory
3:45pm - 4:30pm	Q&A

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Day 2: Account Settings and Customization

9:00am - 9:15am	Introduction - Agenda Review
9:15am - 10:15am	My Account <ul style="list-style-type: none"> • Username/ Password Information • Administrator System Settings • Customizing Header and Footer of WO Print Out
10:15am - 10:30am	Break/ Hands-On
10:30am - 11:00am	Group Activity/Test your knowledge
11:00am - 11:45am	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 • Lookup Creation
11:45am - 1:00pm	Lunch
1:00pm - 1:15pm	Hands-On
1:15pm - 2:15pm	Reporting With X4 <ul style="list-style-type: none"> • Report List • Creation of Reports (Properties, Columns, Filters and Sorting)

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	<ul style="list-style-type: none"> • Group Band
2:15pm-2:30pm	Break/ Hands-On
2:30pm - 3:30pm	Advanced Reporting and Dashboard <ul style="list-style-type: none"> • Setup Reports to be auto-generated • Joining Tables • Advanced Filters • Grouping feature • Creating Calculated fields • Graphs and Instruments • Dashboard Tabs, Properties and Widgets
3:30pm - 3:45pm	Break/ Hands-On
3:45pm - 4:15pm	eMaint University (eU) <ul style="list-style-type: none"> • Navigating eMaint University (Tabs and Buttons) • The different roles • Courses and Modules
4:15pm - 4:30pm	Group Activity/Test your knowledge/Q&A

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Day 3: Advanced Administrator Features

9:00am - 9:15am	Introduction - Agenda Review
9:15am - 10:00am	Workflow Manager <ul style="list-style-type: none"> • Navigating the Workflow Manager • Workflow creation and Configuration • Rules, Conditions and Actions • Workflow Email Template
10:00am - 10:45am	Break/ Hands-On
10:45am - 11:45am	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
11:45am - 1:00pm	Lunch
1:00pm - 1:30pm	Hands-On

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1:30pm - 2:30pm	Data Import and Data Export <ul style="list-style-type: none">• Reviewing Spreadsheets Before Importing• Importing New Records Into the System• Exporting Data
02:30pm - 02:45pm	Break/ Hands-On
3:00pm - 3:30pm	Group Activity/Test your knowledge
3:30pm - 4:30pm	Q&A/Support

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