

# eMaint Boot Camp Training

## X5 Beyond the Basics

Agenda is subject to change.



### Things to know:

- In an effort to accommodate attendees in different time zones, our remote bootcamps start at **9:00 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:
  - Eastern: **9:00 am - 4:30 pm**
  - 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 X5

9:00am - 9:15am	<b>Introduction - Agenda Review</b>
9:15am - 10:00am	<b>Introduction to X5</b> <ul style="list-style-type: none"> <li>● Logging in</li> <li>● Overview of X5 Key features</li> <li>● Profile Settings</li> <li>● General System Navigation</li> <li>● Introduction to X5 Tabs &amp; List Views</li> </ul>
10:00am - 10:15am	<b>Break/ Hands-On</b>
10:15am - 11:00am	<b>X5 Terminology, System Structure &amp; Data Structure</b> <ul style="list-style-type: none"> <li>● System Structure (Entities vs References)</li> <li>● Data Structure (Explorer Setup)</li> <li>● Creation of Records</li> <li>● Asset Hierarchy</li> <li>● Assets &amp; Related Entities / Contacts &amp; Related Entities</li> </ul>
11:00am - 11:15am	<b>Break/ Hands-On</b>
11:15am - 12:30pm	<b>Work Order Management (Lvl 1)</b> <ul style="list-style-type: none"> <li>● Work order process</li> <li>● How to create WOs</li> <li>● Adding charges</li> <li>● Completing and closing WOs</li> </ul>
12:30pm - 12:45pm	<b>Hands-on</b>

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12:45pm - 2:00pm	<b>Lunch</b>
2:00pm - 2:45pm	<b>Work Request Process</b> <ul style="list-style-type: none"> <li>WO Request process (requester user vs request link)</li> <li>Creating WO requests from QR codes</li> </ul>
2:45pm - 3:30pm	<b>PM Management (Lvl 1) - Calendar Based PMs</b> <ul style="list-style-type: none"> <li>Single Asset PMs</li> <li>Multiple Asset PMs (Single PM schedule with Multiple Assets, each with their own generation dates &gt; Different WOs )</li> <li>Multiple Asset PMs (PMs for Parent Assets - Rounds)</li> <li>PM Generation</li> <li>PM Nesting</li> <li>PM Suppression</li> </ul>
3:30pm - 4:30pm	<b>Hands On/ Q&amp;A</b>



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

9:00am - 9:15am	<b>Introduction - Agenda Review</b>
9:15am - 10:00am	<b>Inventory Management &amp; Purchasing</b> <u>Inventory</u> <ul style="list-style-type: none"> <li>Creation of Parts Record</li> <li>Defining Suppliers</li> <li>Part Location/ Stock Item setup</li> <li>Making Adjustments to Inventory</li> </ul> <u>Purchasing</u> <ul style="list-style-type: none"> <li>Purchase Order Creation</li> <li>Overview Important Entities tied to the PO System (Supplier, Shipping addresses &amp; Tax Rates)</li> <li>Receiving Parts</li> </ul>
10:00am - 10:15am	<b>Break/ Hands-On</b>
10:15am - 11:00am	<b>Barcoding in eMaint</b> <ul style="list-style-type: none"> <li>Overview of Barcoding in eMaint</li> <li>Overview of Barcode Devices and Barcoding Apps</li> </ul>

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11:00am - 11:30am	<b>Hands on/Activity</b>
11:30am - 12:15pm	<b>Work Order Management (Lvl 2)</b> <ul style="list-style-type: none"> <li>The Assignments Tab (Reassigning WOs with Mass Change feature)</li> <li>Defining Columns</li> <li>Setting Up Useful Filters on the listview</li> <li>Setup WO List &amp; Explorer to Manage WOs</li> <li>Follow up WOs</li> <li>Demonstration of WO Related Entities</li> <li>Projects</li> </ul>
12:15pm -12:45pm	<b>Task Library</b> <ul style="list-style-type: none"> <li>Building your Task Library</li> <li>Task Procedures &gt; PM Procedures &gt; WO Procedures</li> </ul>
12:45pm - 2:00pm	<b>Lunch</b>
2:00pm - 2:45pm	<b>PM Management (Lvl 2) - Meter Based PMs &amp; Meter Readings</b> <ul style="list-style-type: none"> <li>Single Asset PMs (Single and multiple Meter types)</li> <li>Meter Type Setup (References)</li> <li>Asset Meter Setup (Asset Record)</li> <li>Overview on Meter Based PMs</li> <li>Enter Meter Readings (Manual and Import)</li> <li>Setting Up Filters on listview/ Explorer Setup</li> </ul>
2:45pm - 3:00pm	<b>Break/ Hands-On</b>
3:00pm-3:45pm	<b>Calendar &amp; Scheduler</b> <ul style="list-style-type: none"> <li>Overview of Calendars and its Relationship with Records</li> <li>Overview of X5 Scheduler</li> </ul>
3:45pm - 4:00pm	<b>Introduction to Reporting</b> <ul style="list-style-type: none"> <li>Basics of Report Creation: Entity selection, Output Columns, Filter setup, Sorting Records, etc</li> </ul>
4:00pm - 4:30pm	<b>Hands On/Q&amp;A</b>

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### Day 3: Beyond the Basics (System Administration)

9:00am - 9:15am	<b>Introduction - Agenda Review</b>
9:15am - 10:00am	<b>Administrative Features/User Management</b> <ul style="list-style-type: none"> <li>Overview of Account Settings</li> <li>Sites, Cultures &amp; Currencies</li> <li>User Permissions &amp; User Roles</li> </ul>
10:00am - 10:15am	<b>Break/ Hands-On</b>
10:15am - 11:00am	<b>Form Design</b> <ul style="list-style-type: none"> <li>Overview of Form Design in X5 (Entities, Forms and References)</li> </ul> <u>Forms</u> <ul style="list-style-type: none"> <li>Creating New Fields &amp; Editing Existing Fields</li> <li>Rearranging fields on the Form</li> <li>System Translations</li> <li>Managing Columns on List View</li> <li>Managing Documents and creating Document Fields</li> </ul> <u>References &amp; Entities</u> <ul style="list-style-type: none"> <li>Creating New References &amp; creating Lookup fields</li> <li>Creating Brand new entities</li> </ul>
11:00am - 11:30am	<b>Hands On/Activity</b>
11:30am - 12:15pm	<b>X5 Training and Networking Tools</b> <u>WalkMe In-App Training</u> <ul style="list-style-type: none"> <li>Overview of WalkMe feature</li> </ul> <u>eMaint University</u> <ul style="list-style-type: none"> <li>Navigating eMaint University (Tabs and Buttons)</li> <li>The different roles roles</li> <li>Courses and Modules Assigning Courses to Other Users</li> </ul> <u>Success Portal</u> <ul style="list-style-type: none"> <li>Navigating the Portal and accessing articles</li> <li>Idea Portal</li> <li>Support Tickets</li> </ul>
12:15pm -12:45pm	<b>Workflows &amp; Email Templates</b> <ul style="list-style-type: none"> <li>Workflow Setup (Send Email Notifications &amp; Auto-populate fields)</li> <li>Creating Email Templates</li> </ul>

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12:45pm - 2:00pm	<b>Lunch</b>
2:00pm - 2:45pm	<b>Data Import &amp; Export</b> <ul style="list-style-type: none"> <li>● Import Data Overview</li> <li>● Spreadsheet prep &amp; Data Import in X5 (Contacts &amp; Assets)</li> <li>● Rotating Shifts with Data Import</li> <li>● Data Export</li> </ul>
2:45pm - 3:00pm	<b>Break/ Hands-On</b>
3:00pm-3:45pm	<b>Advanced Reporting, Graphs &amp; Dashboards</b> <ul style="list-style-type: none"> <li>● Auto Generating Reports</li> <li>● Advanced Filters</li> <li>● Joining Entities in a Report</li> <li>● Grouping Feature</li> <li>● Building your Dashboards (Original Dashboard &amp; Dashboard 2.0)</li> </ul>
3:45pm - 4:30pm	<b>Hands On/Q&amp;A</b>