

eMaint Boot Camp Training

System Administration

Agenda is subject to change.



- 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: Inside Out eMaint- Setting Up Your Account

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 ● Filters ● Sidebar Options (Recently Viewed, Wall, Explorer) ● Creation of Records: Assets and Contacts ● Mass Changes
10:00am - 10:30am	Break/Hands-On
10:30am - 11:30am	User Administration and Administrator Features <ul style="list-style-type: none"> ● User Types & Setting Up User Rights ● Table names ● Copying User Roles ● Changing Usernames and Passwords ● Remove & Recovering Deleted Records
11:30am - 11:45am	Hands-On
11:45am - 1:00pm	Lunch
1:00pm - 1:45pm	Data Importing & Exporting <ul style="list-style-type: none"> ● Reviewing Spreadsheets ● Importing New Records vs Updating Existing Records ● Exporting Data ● Importing Best Practice/Preventing Errors
1:45pm - 2:30pm	Form Design <ul style="list-style-type: none"> ● Overview of Form Design ● Creating New Fields ● Editing Existing Fields ● Rearranging Fields ● Managing Columns

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	<ul style="list-style-type: none"> • Lookup Creation • Data Dictionary Tips and Tricks (Checkboxes, Hidden Fields, Tool Tips etc.)
2:30pm - 2:45pm	Break/ Hands-On
2:45pm - 3:30pm	Workflow Manager <ul style="list-style-type: none"> • WorkFlow Email Template • Workflow Creation & Configuration • Rules, Conditions & Actions • Creation of Useful Workflows
3:30pm - 4:00pm	Break/ Hands-On
4:00pm - 4:30pm	Q&A

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Day 2: Account Dive-In

9:00am - 9:15am	Introduction - Agenda Review
9:15am - 10:15am	Work Orders and PM Schedule Basics <ul style="list-style-type: none"> • Work Order Request Methods • Work Request Approvals • Work Order Process • WO Group Close Out/Print Out • Basic PM Set-Up • PM Generation (Manual)
10:15am - 10:30am	Break/Hands-On
10:30am - 11:30am	Inventory Management Introduction <ul style="list-style-type: none"> • Creation of Parts Record • Associating Suppliers to Parts • Making Adjustments to Inventory
11:30am - 11:45am	Hands-On
11:45am - 1:00pm	Lunch
1:00pm - 1:45pm	Introduction to MX Mobile <ul style="list-style-type: none"> • Overview of MX Mobile Interface • Searching for Records • Managing Work Orders and Inventory

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1:45pm - 2:30pm	Interactive Plans <ul style="list-style-type: none"> • Creating a New Interactive plan • Uploading Map Image • Adding Mapping Points • Pop up Preview vs. Side-Bar Preview • Adding Interactive Map Lookups
2:30pm - 2:45pm	Break/ Hands-On
2:45pm - 3:30pm	eMaint Messenger <ul style="list-style-type: none"> • Enabling eMaint Messenger • Channels Vs Direct Messages • Image Upload • Linking Records to Messages • Offline Messaging • Modifying Status
3:30pm - 4:00pm	Break/ Hands-On
4:00pm - 4:30pm	Q&A

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Day 3: Managing Your Data

9:00am - 9:15am	Introduction - Agenda Review
9:15am - 10:30am	eMaint Resource Overview <ul style="list-style-type: none"> • Accessing eMaint University • User Roles in eMaint University • Assigning Courses • Assigning Learning Paths • eMaint University Reports • eMaint Certification • Success Portal • Submitting Ideas • Support Options • eMaint Training Services
10:30am - 10:45am	Break/Hands-On

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10:45am - 11:30am	<p>Managing Document Storage</p> <ul style="list-style-type: none"> • Key features • X4 Document Storage File Formats • Document Storage Access • Adding Folders to Document Storage • Uploading Files to Document Storage • Adding Images and Files to Records • Resizing Images for Record or List view
11:30am - 11:45am	Hands-On
11:45am - 1:00pm	Lunch
1:00pm - 2:00pm	<p>Administrator Settings</p> <ul style="list-style-type: none"> • Defining all administrator Settings <ul style="list-style-type: none"> -General System Settings -Time Zones, Currency, Languages, Security -Work Order, PM, Inventory settings -Email Preferences
2:00pm - 2:15pm	Break/ Hands-On
2:15pm - 3:00pm	<p>Basic Reporting</p> <ul style="list-style-type: none"> • Report List • Creation Of Reports • Setting Up Auto-Generated Reports • Report Creation (Properties, Columns, Filters, and Sorting) • Group Band
3:00pm - 3:30pm	<p>Defining Advanced Reporting features</p> <ul style="list-style-type: none"> • Joining Tables • Advanced Filters • Grouping Feature • Creating Calculated Fields • Graphs and Instruments • Dashboard Tabs, Properties, and Widgets
3:30pm - 4:00pm	What's new in eMaint?
4:00pm - 4:30pm	Q&A

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