

eMaint Boot Camp Training

WM & PMs

Agenda is subject to change.



- **Bootcamp will run from 9:00AM CET until 4:30PM CET, but can finish earlier depending on number of attendees, questions, or trainer discretion.**



Day 1: Introduction to eMaint CMMS

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
10:00am - 10:30am	Work Order Request & Asset Reservation Request <ul style="list-style-type: none"> ● Work Order Requests (Requestor User x Approver) ● Asset Reservation Process (Requestor User x Approver) ● Request Account Settings
10:30am - 11:00am	Introduction to Work Order Management <ul style="list-style-type: none"> ● WO Entry ● WO List View ● WO Charges ● Asset History
11:00am - 11:30am	Work Order Management (Level 2) <ul style="list-style-type: none"> ● WO Process Overview ● Related Tables Review ● WO Permit ● Work Order Management Tools (Mass Change, Explorer setup. Group Close out, Group Print out.) ● Work Order Account Settings
11:30am - 11:45 am	Break
11:45pm - 12:15pm	Introduction to PM Schedules <ul style="list-style-type: none"> ● Basic PM Set-Up ● PM Generation (Manual)
12:15pm - 12:45pm	Introduction to Inventory <ul style="list-style-type: none"> ● Creation of Parts Record ● Important Fields on the Parts Form ● Inventory Setup

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	<ul style="list-style-type: none"> ● Making Adjustments to Inventory
12:45am - 1:15pm	Scheduler & Custom Filters <ul style="list-style-type: none"> ● Viewing WO Assignments on Calendar View ● Assigning Work Through Scheduler ● Scheduler Settings ● Work Orders on Calendar View ● Custom Filter Setup
12:15pm - 1:15pm	Lunch
1:15pm - 2:00pm	Introduction to Inventory <ul style="list-style-type: none"> ● Creation of Parts Record ● Important Fields on the Parts Form ● Inventory Setup ● Making Adjustments to Inventory
2:00pm - 2:30pm	Break/Hands-On
2:00pm - 2:45pm	Scheduler & Custom Filters <ul style="list-style-type: none"> ● Viewing WO Assignments on Calendar View ● Assigning Work Through Scheduler ● Scheduler Settings ● Work Orders on Calendar View <p>Custom Filter Setup</p>
	Projects <ul style="list-style-type: none"> ● Project Setup ● Gantt Chart Review
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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	<ul style="list-style-type: none"> Overview of Integration between X4 and Fluke Connect
3:15pm - 3:45pm	Hands-On
3:45pm - 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 <ul style="list-style-type: none"> 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) <ul style="list-style-type: none"> 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 <ul style="list-style-type: none"> 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 <ul style="list-style-type: none"> Viewing Asset information on PM List / Explorer Setup PM Manager Options: Filtering Records, Mass Change on PMs, PM Due Date Manager, Next PM Date Adjustments & Annual PM Projection PM Distribution
2:30pm - 2:45pm	Hands-On Training
2:45pm - 3:00pm	Break
3:00pm - 3:45pm	Reporting in X4 (Work Order & PM Reports)

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	<ul style="list-style-type: none"> • Introduction to Reporting Module / Report Creation • Review of Existing WO and PM Reports • Group Banding • Creation of Useful WO and PM Reports
3:45pm - 4:30pm	Q&A

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