

eMaint Boot Camp Training

X5 SYSTEM ADMINISTRATION

Agenda is subject to change.

bootcamps.emaint.com



To accommodate attendees in different time zones, our remote bootcamps start at 9:00am EST. These are the start and end times in 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: 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">• Overview of X5 Interface• Profile Settings• General System Navigation• Rearranging and resizing the columns on the list view Sorting records on the list view <ul style="list-style-type: none">• Filtering Records on the List view• Saving Filters• Starring Records• History Panel• Toggling Left Menu
10:00am - 10:30am	Break/Hands-On
10:30am - 11:30am	User Administration and Administrator Features <ul style="list-style-type: none">• Account Settings Overview• Sites Creating Groups Creating Sites <ul style="list-style-type: none">• Cultures and Currencies• Understanding User Roles and User List User Roles Applying Roles to Users
11:30am - 11:45am	Hands-On



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11:45am - 1:00pm	Lunch
1:00pm - 1:45pm	<p>X5 Terminology, System Structure & Data Structure</p> <ul style="list-style-type: none"> • X5 Terminology • System Structure (Entities and References) • Entity <p>Entity Types, Scopes, & Behaviors Managing References</p> <ul style="list-style-type: none"> • Configuring the Explorer
1:45pm - 2:30pm	<p>Form Design</p> <ul style="list-style-type: none"> • Form Design Overview • Field Creation and Field Settings • Configuring Your Forms <p>Adding existing fields to a form</p> <ul style="list-style-type: none"> • Understanding "References" (Lookups) • Electronic Signature
2:30pm - 2:45pm	Break/ Hands-On
2:45pm - 3:30pm	<p>Data Importing & Exporting</p> <ul style="list-style-type: none"> • Preparing Spreadsheet • Importing Data • Exporting Data and Updating Existing Records
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	<p>Work Orders and PM Schedule Basics</p> <ul style="list-style-type: none"> • Work Order Process • How to Create Work Orders • Adding Charges • Completing and Closing Work Orders <p>Scheduled Work Orders</p> <ul style="list-style-type: none"> • Single Asset – Calendar and Meter Based • PM Generation • PM Nesting • PM Suppression
10:15am - 10:30am	Break/Hands-On
10:30am - 11:30am	<p>Inventory Management Introduction</p> <ul style="list-style-type: none"> • Creating Parts • Part Location / Stock Item Setup • Defining Suppliers • Adjusting Inventory • Viewing Inventory History • Audit Trail
11:30am - 11:45am	Hands-On
11:45am - 1:00pm	Lunch
1:00pm - 1:45pm	<p>Going Paperless</p> <ul style="list-style-type: none"> • Barcodes • QR Codes • Printable Labels
1:45pm - 2:30pm	<p>Introduction to Fluke Mobile</p> <ul style="list-style-type: none"> • Overview • Work Orders • Assets • Work Requests
2:30pm - 2:45pm	Break/ Hands-On



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2:45pm - 3:30pm	<p>Workflows & Email Templates</p> <ul style="list-style-type: none"> • Navigating and Understanding the Workflows Feature • Workflow Overview • Creating Workflows • Creating Email Templates <p>Adding template to a workflow</p>
3:30pm - 4:00pm	Break/ Hands-On
4:00pm - 4:30pm	Q&A

Day 3: Managing Your Data

9:00am - 9:15am	Introduction - Agenda Review
9:15am - 10:00am	<p>eMaint Resource Overview</p> <ul style="list-style-type: none"> • WalkMe In-App Training • Accessing eMaint University • Customer Success Portal • Submitting Help Tickets
10:00am - 10:30am	Break/Hands-On
10:30am - 11:00am	<p>Interactive Plans and Visual Templates</p> <ul style="list-style-type: none"> • Creating Interactive Plans • Setting Color filters for Assets and Parts
11:00am - 11:45am	<p>Account Settings</p> <ul style="list-style-type: none"> • Security • Branding • Calendars • Scheduled Reports • Scheduler • E - Signature
11:45am - 1:00pm	Lunch
1:00pm - 1:45pm	Hands - On



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1:45pm - 2:30pm	<p>Introduction to Reporting</p> <ul style="list-style-type: none">• Understanding the Report Module in X5• Table Selection, Output Columns, Filter Setup, Sorting Records
2:30pm - 2:45pm	Break/Hands-On
3:00pm - 3:30pm	<p>Advanced Reporting, Graphs and Dashboards</p> <ul style="list-style-type: none">• Auto Generating Reports• Advanced Filters• Joining Entities in a Report• Grouping Feature• Building your Dashboard
3:30pm - 4:00pm	Break / Hands – On / What is new in eMaint?
4:00pm - 4:30pm	Q&A



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