Work Orders & PMs

Agenda is subject to change.

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: Introduction to eMaint X5

9:00am – 9:15am	Introduction – Agenda Review
9:15am – 10:00am	**Introduction to X5** ▪ Logging in ▪ Overview of X5 Interface ▪ Profile Settings ▪ General System Navigation ▪ Introduction to X5 Tabs and List Views
10:00am – 10:15am	Break / Hands-On
10:15am – 11:00am	**Introduction to Work Order Management (Level 1)** ▪ Work Order Process ▪ How to Create Work Orders ▪ Adding Charges ▪ Completing and Closing Work Orders

11:00am – 11:30am	**Introduction to Scheduled Work Orders / Preventative Maintenance (PMs)**
	▪ Event Types:
	   Preventative Maintenance, Inspection Round, External Trigger
	▪ PM set up:
	   Triggers, Details, and Work Order Templates
	▪ PM Generation (Manual)

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11:30am -11:45am	**Group Activity**
11:45am – 1:00pm	**LUNCH**
1:00pm – 1:45pm	**Introduction to Inventory** ▪ Creation of Parts Records ▪ Defining Suppliers ▪ Part Location / Stock Item Setup ▪ Adjusting Inventory ▪ Parts Reorder List
1:45pm – 2:00pm	Break / Hands-On
2:00pm – 2:45pm	**Scheduler in eMaint X5** ▪ Overview of Calendars and their Relationship with Records ▪ Overview of X5 Scheduler ▪ Assignments From and To Fields ▪ Views and Calendar Selection ▪ Assigning Unassigned Work and Publishing ▪ Reassigning Work, Moving Work Orders to New Dates, Adjusting Times for Work Orders.
2:45pm – 3:30pm	**Group Activity / Test Your Knowledge**
3:30pm – 3:45pm	Break / Hands-On
3:45pm – 4:30pm	**Q&A**

- Day 2: Work Management in eMaint X5

9:00am – 9:15am	Introduction – Agenda Review
9:15am – 10:00am	**Work Request Process** ■ Requester Account / User ■ Request Link ■ Creating Work Order Requests from QR Codes
10:00am – 10:15am	Break / Hands-On

10:15am – 11:00am	**Task Library**
	■ Task Procedure Types
	■ Building your Task Library
	    Reordering Tasks
	    Task Labor
	    Task Parts
	■ Task Procedures > PM Procedures > WO Procedures

11:00am – 11:30am	**Work Order Management (Level 2)** ■ The Assignments Tab (Reassigning WOs with Mass Change feature) ■ Defining Columns ■ Setting Up Useful Filters on the list view ■ Setup WO List & Explorer to Manage WOs ■ Follow up WOs ■ Demonstration of WO Related Entities ■ Projects ■ Adding Tasks to Work Orders
11:45am – 1:00pm	Lunch

1:00pm – 1:45pm	**Work Order Management (Level 3) – Multi Asset Work Orders** • **Setting Up Parent / Child Relationships** • **Basic Pass-Fail Multi-Asset Work Orders (all have same procedures)** • **Using Parent /Children in Inspection Rounds and Preventative Maintenance Scheduled Work Orders.**
1:45pm – 2:00pm	Break / Hands-On
2:00pm – 2:45pm	**WO Management on X5 Using a Tablet / Fluke Mobile** • Overview of Fluke Mobile Interface • Work Order Management – Mine and All Work Orders List • Assets • Work Requests • Online Help Guide • X5 Tablet Experience
2:45pm – 3:30pm	**Group Activity / Test Your Knowledge**
3:30pm – 3:45pm	Break / Hands-On
3:45pm – 4:30pm	**Q&A**

- Day 3: PM Management in eMaint X5

9:00am – 9:15am	Introduction – Agenda Review
9:15am – 10:00am	**PM Management (Lvl 2) - Meter Based PMs & Meter Readings** ▪ Single Asset PMs (Single and multiple Meter types) ▪ Meter Type Setup (References) ▪ Asset Meter Setup (Asset Record) ▪ Overview on Meter Based PMs ▪ Enter Meter Readings (Manual and Import) ▪ Setting Up Filters on list view/ Explorer Setup
10:00am – 10:15am	Break
10:15am – 11:00am	**PM Management (Lvl 3) – Advanced Topics** ▪ Generate Future Scheduled Work Orders ▪ Meter Based Scheduled Work Order Nesting ▪ Audit Trail ▪ Stats and Reports at the Asset Level
11:00am – 11:30am	**Condition Monitoring**
11:45am –1:00pm	LUNCH

1:00pm – 1:45pm	**Building the Perfect Work Order Template** ▪ Overview of Form Design in X5 (Entities, Forms and References) ▪ Understanding References ▪ Creating New Fields & Editing Existing Fields ▪ Rearranging fields on the Form ▪ System Translations ▪ Multimedia Fields for inline play of media ▪ Electronic Signature
1:45pm – 2:00pm	Break / Hands-On
2:00pm – 2:45pm	**Reporting in X5** ▪ Basics of Report Creation ▪ Entity Selection ▪ Output Columns ▪ Filter Setup ▪ Sorting Records
2:45pm – 3:30pm	**Group Activity / Test Your Knowledge**
3:30pm – 3:45pm	Break / Hands-On
3:45pm – 4:30pm	**Q&A**