

# Work Orders & PMs + Reports and Dashboards



*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	<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 Interface</li> <li>▪ Profile Settings</li> <li>▪ General System Navigation</li> <li>▪ Introduction to X5 Tabs and List Views</li> </ul>
10:00am – 10:15am	<b>Break / Hands-On</b>
10:15am – 11:00am	<b>Introduction to Work Order Management (Level 1)</b> <ul style="list-style-type: none"> <li>▪ Work Order Process</li> <li>▪ How to Create Work Orders</li> <li>▪ Adding Charges</li> <li>▪ Completing and Closing Work Orders</li> </ul>
11:00am – 11:30am	<b>Introduction to Scheduled Work Orders / Preventative Maintenance (PMs)</b> <ul style="list-style-type: none"> <li>▪ Event Types: Preventative Maintenance, Inspection Round, External Trigger</li> <li>▪ PM set up: Triggers, Details, and Work Order Templates</li> <li>▪ PM Generation (Manual)</li> </ul>



[www.emaint.com](http://www.emaint.com) (239) 494-8928

# Work Orders & PMs + Reports and Dashboards



*Agenda is subject to change.*

11:30am -11:45am	<b>Group Activity</b>
11:45am – 1:00pm	<b>LUNCH</b>
1:00pm – 1:45pm	<b>Introduction to Inventory</b> <ul style="list-style-type: none"> <li>▪ Creation of Parts Records</li> <li>▪ Defining Suppliers</li> <li>▪ Part Location / Stock Item Setup</li> <li>▪ Adjusting Inventory</li> <li>▪ Parts Reorder List</li> </ul>
1:45pm – 2:00pm	<b>Break / Hands-On</b>
2:00pm – 2:45pm	<b>Scheduler in eMaint X5</b> <ul style="list-style-type: none"> <li>▪ Overview of Calendars and their Relationship with Records</li> <li>▪ Overview of X5 Scheduler</li> <li>▪ Assignments From and To Fields</li> <li>▪ Views and Calendar Selection</li> <li>▪ Assigning Unassigned Work and Publishing</li> <li>▪ Reassigning Work, Moving Work Orders to New Dates, Adjusting Times for Work Orders.</li> </ul>
2:45pm – 3:30pm	<b>Group Activity / Test Your Knowledge</b>
3:30pm – 3:45pm	<b>Break / Hands-On</b>
3:45pm – 4:30pm	<b>Q&amp;A</b>



# Work Orders & PMs + Reports and Dashboards



*Agenda is subject to change.*

## • Day 2: Work Management in eMaint X5

9:00am – 9:15am	Introduction – Agenda Review
9:15am – 10:00am	<b>Work Request Process</b> <ul style="list-style-type: none"> <li>▪ Requester Account / User</li> <li>▪ Request Link</li> <li>▪ Creating Work Order Requests from QR Codes</li> </ul>
10:00am – 10:15am	Break / Hands-On
10:15am – 11:00am	<b>Task Library</b> <ul style="list-style-type: none"> <li>▪ Task Procedure Types</li> <li>▪ Building your Task Library <ul style="list-style-type: none"> <li>Reordering Tasks</li> <li>Task Labor</li> <li>Task Parts</li> </ul> </li> <li>▪ Task Procedures &gt; PM Procedures &gt; WO Procedures</li> </ul>
11:00am – 11:30am	<b>Work Order Management (Level 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 list view</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> <li>▪ Adding Tasks to Work Orders</li> </ul>
11:45am – 1:00pm	Lunch



# Work Orders & PMs + Reports and Dashboards



*Agenda is subject to change.*

1:00pm – 1:45pm	<b>Work Order Management (Level 3) – Multi Asset Work Orders</b> <ul style="list-style-type: none"> <li>▪ Setting Up Parent / Child Relationships</li> <li>▪ Basic Pass-Fail Multi-Asset Work Orders (all have same procedures)</li> <li>▪ Using Parent /Children in Inspection Rounds and Preventative Maintenance Scheduled Work Orders.</li> </ul>
1:45pm – 2:00pm	Break / Hands-On
2:00pm – 2:45pm	<b>WO Management on X5 Using a Tablet / Fluke Mobile</b> <ul style="list-style-type: none"> <li>▪ Overview of Fluke Mobile Interface</li> <li>▪ Work Order Management – Mine and All Work Orders List</li> <li>▪ Assets</li> <li>▪ Work Requests</li> <li>▪ Online Help Guide</li> <li>▪ X5 Tablet Experience</li> </ul>
2:45pm – 3:30pm	<b>Group Activity / Test Your Knowledge</b>
3:30pm – 3:45pm	Break / Hands-On
3:45pm – 4:30pm	<b>Q&amp;A</b>

# Work Orders & PMs + Reports and Dashboards



*Agenda is subject to change.*

## • Day 3: PM Management in eMaint X5

9:00am – 9:15am	Introduction – Agenda Review
9:15am – 10:00am	<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 list view/ Explorer Setup</li> </ul>
10:00am – 10:15am	Break
10:15am – 11:00am	<b>PM Management (Lvl 3) – Advanced Topics</b> <ul style="list-style-type: none"> <li>Generate Future Scheduled Work Orders</li> <li>Meter Based Scheduled Work Order Nesting</li> <li>Audit Trail</li> <li>Stats and Reports at the Asset Level</li> </ul>
11:00am – 11:30am	<b>Condition Monitoring</b>
11:45am – 1:00pm	LUNCH



# Work Orders & PMs + Reports and Dashboards



*Agenda is subject to change.*

1:00pm – 1:45pm	<b>Building the Perfect Work Order Template</b> <ul style="list-style-type: none"> <li>▪ Overview of Form Design in X5 (Entities, Forms and References)</li> <li>▪ Understanding References</li> <li>▪ Creating New Fields &amp; Editing Existing Fields</li> <li>▪ Rearranging fields on the Form</li> <li>▪ System Translations</li> <li>▪ Multimedia Fields for inline play of media</li> <li>▪ Electronic Signature</li> </ul>
1:45pm – 2:00pm	Break / Hands-On
2:00pm – 2:45pm	<b>Reporting in X5</b> <ul style="list-style-type: none"> <li>▪ Basics of Report Creation</li> <li>▪ Entity Selection</li> <li>▪ Output Columns</li> <li>▪ Filter Setup</li> <li>▪ Sorting Records</li> </ul>
2:45pm – 3:30pm	<b>Group Activity / Test Your Knowledge</b>
3:30pm – 3:45pm	Break / Hands-On
3:45pm – 4:30pm	<b>Q&amp;A</b>

# Work Orders & PMs + Reports and Dashboards



*Agenda is subject to change.*

## Reports and Dashboards in eMaint X5

9:00am – 9:15am	Introduction – Agenda Review
9:15am – 10:00am	<b>Reporting in X5</b> <ul style="list-style-type: none"> <li>▪ Basics of Report Creation</li> <li>▪ Entity Selection</li> <li>▪ Output Columns</li> <li>▪ Filter Setup</li> <li>▪ Sorting Records</li> </ul>
10:00am – 10:15am	Break / Hands-On
10:15am – 11:00am	<b>Advanced Reporting and Preparing Data for Graphs</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> </ul>
11:00am – 11:30am	<b>Setting up Basic Dashboards 1.0</b> <ul style="list-style-type: none"> <li>▪ Links</li> <li>▪ Reports</li> <li>▪ Output Types: Box, Cards, Chart, Map, Table</li> <li>▪ Graph Types: Bar, Doughnut, Line, Pie, Polar Area, Radar</li> </ul>
11:45am – 1:00pm	Lunch



# Work Orders & PMs + Reports and Dashboards



*Agenda is subject to change.*

1:00pm – 1:45pm	<b>Setting up Basic Dashboards 2.0</b> <ul style="list-style-type: none"> <li>▪ New Dashboard Creation</li> <li>▪ Binding Data to Dashboard</li> <li>▪ Basic Grid Report</li> <li>▪ Resizing</li> <li>▪ Conditional Formatting</li> <li>▪ Converting to Other Types</li> </ul>
1:45pm – 2:00pm	Break / Hands-On
2:00pm – 2:45pm	<b>Setting up Advanced Dashboards 2.0 - Advanced Graphs</b> <ul style="list-style-type: none"> <li>▪ Two Column</li> <li>▪ Stacked</li> <li>▪ Pareto</li> <li>▪ Interactivity: Drill Downs</li> </ul>
2:45pm – 3:30pm	<b>Group Activity / Test Your Knowledge</b>
3:30pm – 3:45pm	Break / Hands-On
3:45pm – 4:30pm	<b>Q&amp;A</b>