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Confidentiality Statement:

This document is proprietary and confidential. No part of this document may be disclosed in any manner to a third party without the prior written consent of eMaint.
Introduction

At the highest level, eMaint approaches every initial implementation with the mindset that we are partnering with our clients to ensure their success. Thank you for choosing to partner with eMaint on your project. For us, the only acceptable outcome is a successful partnership.

This assessment worksheet is designed to provide you with the ability to document your desired future state, with eMaint CMMS as a partner and tool, as you resolve to become World Class in Maintenance and Operations.

Purpose and Goal

An initial implementation is just the starting point of bringing you onboard with eMaint CMMS and the organization as a whole. The immediate goal of this questionnaire is to determine what processes (current state of Maintenance / Operation), people, and data will be part of your eMaint CMMS implementation. As such, the primary focus will be on identifying and prioritizing immediate needs relative to your current state of Maintenance / Operations to get you up and running with eMaint CMMS.

The purpose of this questionnaire is to learn more about your current maintenance management activities and required improvements to help us identify the appropriate building blocks for a successful Initial Implementation. Please complete the questions below and return your results to your eMaint Customer Success Manager 48 business hours prior
to your scheduled welcome call.

1. Client Information
Please fill in the below information

Primary Contact Name: _________________________________________________________
Primary Contact Phone: _________________________________________________________

2. Client Project Team
Please fill in the names corresponding to each role below

Internal client ownership by the project team is critical to the success of your initial implementation. Allocating the correct resources now will ensure that you have the necessary people trained to manage your eMaint CMMS day-to-day. Please list your key contributors below (one person may fill multiple roles):

Project Manager: ____________________________________________________
Assist in making key decisions regarding the direction of the project including timeline, project scope, data conversion strategy, customization, and critical reporting. Central point of contact between your internal team and eMaint.

Decision Maker: ____________________________________________________
This individual will be responsible for overall project guidance, project performance metrics, project budget, reporting. Responsible for providing sign-off on the configuration and data conversion before Go-Live.

Project Lead: ____________________________________________________
Central point of contact for all communication and is your internal eMaint “expert”, having the best knowledge of how your specific system is configured, and how the software is designed to work. The role of Project Lead is ideally this person’s primary focus.

Process Design Team: ____________________________________________________
This team typically contains members from all divisions where the software will be utilized. This may involve decisions such as work order routing, which fields will be visible/required, and system standardization.

Technical Resources: ____________________________________________________
This group is responsible for managing the system environment, participating in integration requirements, and ideally can provide SQL scripting or HTML support as needed for system configuration.

Subject Matter Expert(s) (SME): _____________________________________________
The role of the SME is to provide the eMaint Team with information regarding people, process, and data related to the implementation. They are usually representatives of the future system users. The number of SMEs that client assigns to the project depends on internal roles.
### 3. Volume and Usage

**Please select the appropriate range for each category**

#### 3.1: What is the estimated number of users who will be using eMaint as:

<table>
<thead>
<tr>
<th>System Administrators: (Only One per Dataset)</th>
<th>Users:</th>
<th>Work Requesters:</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ 1-5</td>
<td>□ 1-5</td>
<td>□ 1-10</td>
</tr>
<tr>
<td>□ 6-15</td>
<td>□ 11-30</td>
<td>□ 31-100</td>
</tr>
<tr>
<td>□ 16-30</td>
<td>□ 31-100</td>
<td></td>
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<tr>
<td>□ 31-50</td>
<td>□ 101-500</td>
<td></td>
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<tr>
<td>□ &gt;50</td>
<td>□ &gt;500</td>
<td></td>
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</tbody>
</table>

#### 3.2: How many work orders would you estimate your company processes in a given month?

<table>
<thead>
<tr>
<th>Corrective Work Orders:</th>
<th>Scheduled (PM) Work Orders:</th>
<th>Number of Assets:</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ 0 to 250</td>
<td>□ 0 to 250</td>
<td>□ 0 to 250</td>
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<tr>
<td>□ 251 to 500</td>
<td>□ 251 to 500</td>
<td>□ 251 to 500</td>
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<tr>
<td>□ 501 to 1000</td>
<td>□ 501 to 1000</td>
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<tr>
<td>□ 1001 to 2500</td>
<td>□ 1001 to 2500</td>
<td>□ 1000 to 2500</td>
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<tr>
<td>□ 2501 to 5000</td>
<td>□ 2501 to 5000</td>
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<tr>
<td>□ 5000 +</td>
<td>□ 5000 +</td>
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</table>

#### 3.3: Can you indicate number of purchase requisitions and/or purchase orders in a given month?

<table>
<thead>
<tr>
<th>Requisitions:</th>
<th>Purchase Orders:</th>
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<tbody>
<tr>
<td>□ 0 to 250</td>
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<td>□ 2501 to 5000</td>
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<tr>
<td>□ 5000 +</td>
<td>□ 5000 +</td>
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</tbody>
</table>
3.4: What is the estimated number of individual part items (SKUs), total number of part items and valuation?

Number of SKUs: 
- 1-100
- 101-300
- 300-750
- >750

Total number of Part Items: 
- 1-250
- 251-500
- 501-1000
- >1000

Valuation:
- 50,000
- 75,000
- 150,000
- 500,000
- >750,000

4. Existing Approach

4.1: What works well with your current approach? (In terms of Asset Management, Work Management, Inventory Management, Purchasing Management)

4.2: What does not work well?
5. Existing Data Sources
Please select all that apply, and indicate source

5.1: Do you currently have a maintenance software application?

- Yes (please list): ____________________________________________________________
- No (please list current method of tracking existing data):
  __________________________

5.2: If you answered “No” above, check each selection below of data you currently track and indicate what format the data is stored in (spreadsheet, legacy system, stubby pencil & clipboard, etc.).

- Asset Locations/Equipment _________________
- Preventative Maintenance _________________
- Procedures / Tasks _________________
- Contract / Employee Information _________________
- Inventory/Parts History _________________
- Work Order History _________________
- Purchasing _________________
- Other: _________________
6. Software Goals

6.1: What are your primary objectives/drivers for implementing eMaint?

Please rank the below choices to indicate relative priority (1 – 14)

- Automate Preventive Maintenance
- Asset Locations / Equipment Hierarchy
- Streamline and/or Automate Workflow
- Contractor / Employee Information
- Capture Maintenance History
- Capture Maintenance Costs (labor and materials)
- Procedures / Tasks Library
- Inventory / Parts Lists (Bill of Materials)
- Increase visibility and accountability
- Manage Inventory Quantities
- Increase Overall Efficiency
- Establish a web request system for work orders
- Regulatory
- Other Business Driver: __________________________________________
7. Functional Usage

Please select all that apply

7.1: In order to streamline the Initial Implementation process, please indicate the Initial Focus of eMaint CMMS you plan to use:

- Asset Management
- Work Order Management
- Service Requester
- Preventative Maintenance Management
- Labor Management
- Inventory Management
- Purchasing
- Reporting
- Project Management
- Mobile Devices
- Other: ________________________________

7.2: Equipment Hierarchy:

Please provide a detailed listing of your current Equipment Hierarchy structure. If no current structure is deployed, please indicate the desired structure you wish to implement.

1. _________________ Top Tier
2. _________________ Second Tier
3. _________________ Third Tier
4. _________________ Fourth Tier
5. _________________ Fifth Tier
6. _________________ Sixth Tier
7. _________________ Seventh Tier
Example Hierarchy Structure:

```
Site ➔ Building
  ➔ Room
    ➔ Air Handling Unit
        ➔ AHU Pump
            ➔ Motor
                ➔ Electric Harness
```

7.3: Parts Management

Please provide answers to the following parts management questions

1. Do you currently have established storeroom(s) with identified locations?
   Please list number of stores, their names and example of your parts location nomenclature.

<table>
<thead>
<tr>
<th>Store Number</th>
<th>Store Name</th>
<th>Example of Parts Location Nomenclature</th>
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2. Do you currently cross-reference parts to assets? Do you wish to begin?
   ❑ Yes (please comment): ____________________________
   ❑ No (please comment): ____________________________

3. Do you currently cross-reference parts to PM Schedules? (PM Parts/Kits)
   ❑ Yes (please comment): ____________________________
   ❑ No (please comment): ____________________________

4. Do you use Reorder Point (min) and Reorder Quantity (max) set points for parts reordering?
5. Do you currently deploy and execute a Parts Kitting workflow? If so, please explain:
   ❑ Yes (please comment): _____________________________________________
   ❑ No (please comment): _____________________________________________

8. Reporting Goals

Please select all that apply and rank in order of priority 1-8

8.1: What will be your primary objectives for your eMaint CMMS reports?

❑ ___ Equipment Cost Tracking
❑ ___ Work History
❑ ___ Failure Analysis
❑ ___ Equipment Downtime
❑ ___ Maintenance Backlog
❑ ___ Completion Rates
❑ ___ Labor Cost / Productivity
❑ ___ Other: ________________________________

8.2: Do you have any required (e.g. compliance, regulatory, audit) reports that must be created prior to go-live? If so, please list below:


8.3: Immediate needs of KPI's and Metrics

Please provide examples of KPI and/or Metrics you desire to begin tracking upon immediate Initial Implementation

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9. Customization/Integration/Interface Considerations

Please select all that apply

**Note:** Services time is required to perform customizations, integrations or interfaces

9.1: Do you intend to apply Custom Configurations eMaint CMMS?

- [ ] Work Order/Purchase Order printout(s)
- [ ] Service Requester Customization
- [ ] Advanced Event-Based Automation (Workflows in eMaint CMMS)
- [ ] Advanced Reports, Charting and/or Key Performance Indicators (KPIs)
- [ ] Integration(s) to external system(s) (Accounting, ERP, etc.)
- [ ] PLC Interface
- [ ] New Interface/functionality (please describe)
- [ ] Other:__________________________________________
10. Training

10.1 Training Delivery

Please select the option that best reflects your preference

Note: In-person visits typically require 6-8 weeks advance notice and will incur travel expenses

- **Remote Training Only**: I prefer this training delivery and understand the following is typical as it relates to this method:
  - Utilizes phone and web conferencing tools (may require IT assistance)
  - Training sessions range between 1-2 hours
  - Small group meetings are most productive
  - Best for customers with smaller service balances and basic requirements

- **Combination Training**: I prefer this training delivery which includes a combination of remote and in-person training. I understand the following is typical as it relates to this method:

  **Remote training sessions:**
  - Range between 1-2 hours
  - Include Kick-Off, Project Status, and Data Migration meetings

  **In-person training sessions:**
  - Range between 2-4 days and will incur travel costs
  - Allow efficient interaction with larger groups
  - More effective for customers with higher service balances and advanced requirements
  - Best supports training coverage of Custom Configuration(s)
10.2. Training Approach

Please select the option that best reflects your preference.

Note: Internal ownership by the Project Team is critical to the success of the Initial Implementation. The Project Lead will become the eMaint “expert” and will have the best knowledge of your system configuration.

- **Train-The-Trainer**: I prefer this approach and understand the following is typical as it relates to this approach:
  - End-user training will be delivered by the Project Team
  - Allows purchased services to be focused upon configuration, design and “best practices”

- **Combination**: I prefer this approach which includes a combination of train-the-trainer and end-user training. I understand the following is typical as it relates to this approach:
  - Requires purchased services to be reserved and allocated for in-person training sessions
  - In person training must be booked 6-8 weeks in advance

10.3 Training Locations

If you anticipate that your Implementation Consultant will be visiting onsite for kick-off meetings and training, please respond to the below questions

- I anticipate the training will occur in a single location where we will gather our team together.
- I anticipate the training will occur in multiple locations where portions of our team are located (please list below):
11. Pre-Implementation On-site Assessment Requirements (if applicable)

Please provide answers to the following questions if a Pre-Implementation Assessment on-site engagement was purchased

Check-In Procedure for On-site?

PPE Requirements?

Whiteboards, Overhead Projectors and Internet Access (wireless)?

Please provide examples of existing Asset and Work Order information, reports, etc. from current Equipment Management Plan or CMMS (Spreadsheets, database copies, etc.)
12. Travel Recommendations

Please indicate your preferred travel options (if any)

12.1: Closest/Preferred Airport:

12.2: Distance to Training Location(s):

12.3: Hotels vendors commonly use:

13. Thank You

Thank you for taking the time to complete the above questions. These responses will assist your Implementation Consultant in identifying the appropriate building blocks for a successful implementation. The next step is to return this form to your eMaint contact. We look forward to working with you towards achieving your goals and furthering our partnership with your team.
Appendix

Information Technology Considerations

eMaint CMMS SaaS Client System Requirements

The only software needed to operate eMaint CMMS from your PC or Mac is a web browser. eMaint CMMS does not install any software on your computer. Below are some of the most commonly used web browsers confirmed to be suitable for use of eMaint CMMS:

- Chrome version 46.0.2490.86 m (Windows and Mac platforms)
- Safari version 9.0.1 (Mac platform)
- Firefox version 42 (Windows and Mac platforms)
- Internet Explorer version 11.0.25 (Windows platform) (Minimum of Version 9 Required)
- Internet Explorer version 5.2.3 (Mac platform)

Additional Notes:

- Minimum screen (monitor resolution requirements for eMaint: 1024 X 768
- JavaScript and cookies must be enabled
- It is strongly recommended that *.emaint.com be added as a trusted zone in the browser
- Adobe Acrobat Reader will be required to view some documents/reports
- The latest version of Adobe Flash Player is required for some areas of the system
- Be sure to check with the manufacturer of the web browser you intend to use to be sure that the client computer complies with all current minimum system requirements

eMaint CMMS Mobile (MX) Client System Requirements

eMaint MX Overview

X Mobile, the wireless version of eMaint’s CMMS solution, is a carefully-selected subset of features designed to allow technicians to access their CMMS in the palm of their hand. Designed to run on smartphones and tablets, it reduces the need for paperwork and frees technicians from their desktop computers.

Work Requests:

- Create work requests
- View and assign open work requests
- Approve or Reject work requests with reason codes

Work Order Management:

- Review, update, edit and close out your assigned work orders and PMs
- Track labor time and inventory usage on each work order
- Add miscellaneous charges to work orders

**Asset Lookup:**
- Access and view asset details
- Create work orders for assets
- Add parts charges directly to the asset

**Inventory Control**
- Issue Parts
- Receive Parts
- Return Parts
- Perform Physical Counts

**Meter Management**
- Enter Meter Readings for Assets (hours, miles, etc.)
- Reset and Adjust Meter Readings for Assets

Please [login to access eMaint University](http://mobile.emaint.com), and view the online training guide for MX Mobile.

**Hardware Options for MX Mobile**

MX Mobile may be used on any device that has a standard modern browser and access to the Internet. Example of mobile operating system with modern web browsers include: Windows Phone 7, Android, iPhone, HP Web OS and newer Blackberry Devices. Examples of device class that have performed well for customers using MX Mobile include, but are not necessarily limited to:

- Most phones running Google Android browsers
- Currently supported Apple iPhone and iPod Touch devices
- Motorola Solutions devices running Windows Mobile 6.5 or later
- Latest versions of Blackberry devices (touchscreen is recommended
- Most modern smartphones that support JavaScript and HTML 5

**Try eMaint’s MX Mobile Solution**

We invite you to try out our MX Mobile solution on your mobile device to ensure it is a good fit for your needs. This requires that you have a valid login/password for eMaint CMMS with sufficient user rights.

- MX Mobile Login URLs: [http://mobile.emaint.com](http://mobile.emaint.com) OR [http://m.emaint.com](http://m.emaint.com)
- Enter a valid eMaint User Login and Password
- Begin using the MX Mobile solution to view your assigned work orders, charge out parts and labor to work orders, close work orders, add work requests, etc.
Introduction
The purpose of this document is to provide technology departments visibility into the IP addresses and domain names used by eMaint CMMS for security planning purposes.

Domain Names
The current list of domain names used by eMaint products is below. It is highly recommended to allow the full *.emaint.com domain through your firewall and user’s Trusted Sites list. Over time we may add additional subdomains and accounts may be transitioned to a different subdomain of emaint.com.

Primary Account Servers DNS
- x3.emaint.com
- x31.emaint.com
- x32.emaint.com
- x33.emaint.com
- x34.emaint.com
- x35.emaint.com

Primary Account Servers IP Addresses

<table>
<thead>
<tr>
<th>Primary Account Servers IP Addresses</th>
</tr>
</thead>
<tbody>
<tr>
<td>72.32.3.125</td>
</tr>
<tr>
<td>72.32.25.218</td>
</tr>
<tr>
<td>72.32.3.121</td>
</tr>
<tr>
<td>72.32.25.216</td>
</tr>
</tbody>
</table>

Mail System Servers
The mail system domain is emaintx3app.com. Anything that generates an email in the system will send through this domain. The IP address for that server is 166.78.68.205

E-Learning Site
Our online learning site, eMaint University, is hosted under a domain different from emaint.com. You will need to allow this domain through your firewall for your users to have access to the text: http://emaintuniversity.litmos.com