eMaint Boot Camp Training
INVENTORY & PURCHASING

Agenda is subject to change.

Day 1: Introduction to Inventory Management

8:00am - 8:15am	Introduction - Agenda Review
8:15am - 9:15am	**New User Intro** ● Logging in ● General System Navigation ● Introduction to X4 Tabs and Tables ● List Views ● Creation of Records: Assets and Contacts
9:15am - 9:45am	Hands-On Training
9:45am - 10:00am	Break
10:00am - 11:30am	**Introduction to Work Orders & PM Schedules** ● Work Order Process (WO entry, WO list, WO charges and WO Closeout) ● Work Order Requests (Request Approval/Rejection) ● Basic PM Set-Up ● PM Parts Related Table ● PM Generation (Manual)
11:30am - 12:15am	Hands-On Training
12:15pm - 1:15pm	Lunch
1:15pm - 2:45pm	**Inventory Management** ● Inventory Setup: Creating Part Records, Overview of Important Fields on the Parts Form & Using the Item Suppliers Table ● Making Adjustments to Inventory ● Using "Related Assets" Table (Bill of Materials) ● WO Part Charges (Individual and/ or using "Add Quick" option) ● Parts Reorder List ● Allocating Parts to WO's ● Inventory Settings
2:45pm - 3:00pm	Break
3:00pm - 3:30pm	Hands-On Training
3:30pm - 4:00pm	**Additional Inventory Features** ● Parts Kitting ● Material Request
4:00pm - 4:30pm	Hands-On Training
4:30pm - 5:00pm	Q&A

Day 2: Purchasing & Requisitioning

8:00am - 8:15am	Introduction / Agenda Review
8:15am - 9:45am	**Purchasing** • Creating New POs • Adding Line Items to POs • Receiving Line Items • Importance of Item Suppliers Table • Purchasing Center
9:45am - 10:00am	Break
10:00am - 10:30	Hands-On Training
10:30am - 11:30am	**Requisitioning Setup** • Creating Approval Groups • Adding Approval Group Users (Requisitioner and Approver) • Adding Accounts to the Groups • Setting Up User Permissions • Global Requisition Settings
11:30am - 12:00pm	Hands-On Training
12:00pm - 1:00pm	Lunch
1:00pm - 2:30pm	**Requisitioning Process** • Setup Review • Requisition Process (Standard and Stock) • Creating and Submitting Requisitions • Requisition Approval • Turning Approved Requisitions into POs
2:30pm - 3:00pm	Hands-On Training
3:00pm - 3:15pm	Break
3:15pm - 3:30pm	**Real Life Simulation** • Group activity that will simulate the Requisition process considering the different roles in the company
3:30pm - 4:30pm	**Multi Inventory Location** • Process of activating Multi Inventory Location • Setting up new locations in the system • Creating Parts and defining on-hand amounts for each location • Inventory transactions (adjustments, WO charges & location transfers) • Reorder parts per location using the Stock Requisition system • Purchase Orders (Multi Inventory Location)
4:30pm - 5:00pm	**Additional Inventory/Purchasing Features and Q&A**

	- Inventory Methods - Punch out

Day 3: MX Mobile & Barcoding

8:00am - 8:15am	Introduction / Agenda Review
8:15am - 10:15am	**Reporting In eMaint X4** - Report List - Reviewing Existing Inventory & PO Reports - Inventory Labels Report - Creation of Reports (Properties, Columns, Filters and Sorting) - Joining Tables - Creation of Parts Usage Report - Inventory Value Widget & Valuation Report
10:15am - 10:30am	Break
10:30am - 11:00am	Hands-On Training
11:00am - 12:00pm	**Inventory Data Import** - Preparing Spreadsheet & Importing Parts - Associating Parts with Suppliers through Import - Making Parts Adjustments with the Data Import Tool - Importing Process for Accounts with Multi Inventory Location - Importing POs into the system
12:00pm - 1:00pm	Lunch
1:00pm - 1:30pm	Hands-On Training
1:30pm - 2:15pm	**MX Mobile** - Overview of MX Mobile Interface - Searching for Records - Managing Inventory: Issuing Parts to WOs, Returning Parts to Inventory, Making Part Adjustments - Managing WO Charges - Embedding Images into WO Requests - Configuring MX Mobile Forms
2:15pm - 2:45pm	Hands-On Training
2:45pm - 3:00pm	Break
3:00pm - 3:45pm	**Hardware & Barcoding (Experience Center Visit)** - Demonstration of Devices and Operating Systems - Discussion of Barcoding in eMaint - Barcode Devices and Barcoding Apps - Demonstration of eMaint Features with Different Devices
3:45pm - 4:30pm	Hands-On Training With Devices

4:30pm - 5:00pm	Q&A