

eMaint Boot Camp Training

WORK MANAGEMENT & PMs
+ REPORTS & DASHBOARDS



Agenda is subject to change.

Day 1: Introduction to eMaint X4

8:00am - 8:30am	Introduction - Agenda Review
8:30am - 9:45am	New User Introduction <ul style="list-style-type: none">● Logging in● General System Navigation● Introduction to X4 Tabs and Tables● List Views● Creation of Records: Assets and Contacts
9:45am - 10:00am	Break
10:00am - 10:30am	Hands-On Training
10:30am - 11:30am	Introduction to Work Order Management <ul style="list-style-type: none">● WO Entry● WO List View● WO Charges● Asset History
11:30am - 12:00am	Hands-On Training
12:00pm - 1:00pm	Lunch
1:00pm - 1:45pm	Introduction to PM Schedules <ul style="list-style-type: none">● Basic PM Set-Up● PM Generation (Manual)
1:45pm - 2:15pm	Hands-On Training
2:15pm - 2:30pm	Break
2:30pm - 3:30pm	Introduction to Inventory <ul style="list-style-type: none">● Creation of Parts Record● Important Fields on the Parts Form● Inventory Setup● Making Adjustments to Inventory
3:15pm - 4:00pm	Hands-On Training
4:00pm - 4:30pm	Scheduler & Custom Filters <ul style="list-style-type: none">● Viewing WO Assignments on Calendar View● Assigning Work Through Scheduler● Scheduler Settings● Work Orders on Calendar View● Custom Filter Setup (Contacts and WOs)
4:30pm - 5:00pm	Hands-On Training / Q&A

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Day 2: Work Order Management

8:00am - 8:15am	Introduction - Agenda Review
8:15am - 9:15am	Work Order Request & Asset Reservation Request <ul style="list-style-type: none">● Work Order Requests (Requestor User x Approver)● Asset Reservation Process (Requestor User x Approver)● Request Account Settings
9:15am - 9:45am	Hands-On
9:45am - 10:00am	Break
10:00am - 11:30am	Work Order Management (Level 2) <ul style="list-style-type: none">● WO Process Overview● Related Tables: Charges Review, Procedures, Assignments & Purchase (PO/WO Relationship)● WO Permit● Work Order Management Tools (Mass Change, Explorer setup, Group Close out/Print)● Work Order Account Settings
11:30am - 12:00	Hands-On Training
12:00pm - 1:00pm	Lunch
1:00pm - 1:30pm	Projects <ul style="list-style-type: none">● Project Setup● Gantt Chart Configuration
1:30pm - 2:00pm	Hands-On
2:00am - 2:45am	WO Management on MX Mobile and X4 Offline App <ul style="list-style-type: none">● Overview of MX Mobile Interface● Searching for Records● Issuing Parts to WOs, Returning Parts to Inventory, Making Part Adjustments● Managing WO Charges● Embedding Images into WO Requests● Using X4 Offline App
2:45am - 3:00pm	Break
3:00pm - 3:30pm	Condition Monitoring <ul style="list-style-type: none">● Learning the setup process● Creating monitor classes and points● Associating your classes and points with assets● Entering readings● Analyzing your data
3:30pm - 4:00pm	Hands-On Training
4:00pm - 4:30pm	Additional Work Management Features and Q&A <ul style="list-style-type: none">● Sign-On/Sign Off Wizard● Vendor Portal



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Day 3: PM Management

8:00am - 8:15am	Introduction - Agenda Review
8:15am - 09:15am	PM Management (Level 2) <ul style="list-style-type: none">● PM Setup Overview (Calendar based)● Nesting PMs● PM Suppression● PM Parts Allocation● PM Settings (Automatic Generation and Email Options)
09:15am - 09:45am	Hands-On Training
9:45am - 10:00am	Break
10:00am - 10:30am	Task Library <ul style="list-style-type: none">● Building your Task Library (the two methods)● Publishing Tasks● Task Procedures > PM Procedures > WO Procedures
10:30am - 10:45am	Hands-On Training
10:45am - 11:30am	Meter Based PMs & Meter Readings <ul style="list-style-type: none">● Overview● Entry Options (Manual, Import, Mobile, Email and Cond. Monitoring)● Meter Manager
11:30am - 12:00pm	Hands-On Training
12:00pm - 1:00pm	Lunch
1:00pm - 1:45pm	PM Management Tools <ul style="list-style-type: none">● Viewing Asset information on PM List / Explorer Setup● PM Manager Options: Filtering Records, Mass Change on PMs, PM Due Date Manager, Next PM Date Adjustments & Annual PM Projection● PM Distribution● Using PM Route Manager
1:45pm - 2:15pm	Hands-On Training
2:15pm - 2:30pm	Break
2:30pm - 3:30pm	Reporting in X4 (Work Order & PM Reports) <ul style="list-style-type: none">● Introduction to Reporting Module / Report Creation● Review of Existing WO and PM Reports● Group Banding● Creation of Useful WO and PM Reports: Open WOs by Employee, Upcoming PM Schedules, etc
3:30pm - 4:00pm	Hands-On
4:00pm - 4:30pm	Additional PM Features and Q&A <ul style="list-style-type: none">● Condition Monitoring (CM Type) PM Schedules



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Day 4: Reports & Dashboards

8:00am - 8:15am	Introduction - Agenda Review
8:15am - 09:15am	Report Creation (Beginner) <ul style="list-style-type: none">● Report List● Basics of Report Creation: Report Properties, Output Columns, Basic Filters, Sorting Records, Group Band
09:15am - 09:45am	Hands-On Training
9:45am - 10:00am	Break
10:00am - 11:30am	Report Creation (Intermediate) <ul style="list-style-type: none">● Auto Generating Reports● Advanced Filters● Joining Tables in a Report● Grouping Feature● Report Functions● Top X Report Feature
11:30am - 12:00pm	Hands-On Training
12:00pm - 1:00pm	Lunch
1:00pm - 2:00pm	Calculated Fields in Reports (Advanced) <ul style="list-style-type: none">● Definition and Basic Walk Through● Creation of Calculated Fields● Calculated Field Functions● Using Advanced Filters With Calculated Fields
2:00pm - 2:30pm	Hands-On Training
2:30pm - 2:45pm	Break
2:45pm - 4:00pm	Graphs, Instruments & Dashboard (Expert) <ul style="list-style-type: none">● Graph Setup● Instrument Setup● Dashboard Tabs and Properties● Publishing Reports● Dashboard Widgets
4:00pm - 4:45pm	Hands-On Training
4:30pm - 5:00pm	Additional Report Discussion <ul style="list-style-type: none">● Reports Q&A● Review Specific Report Requirements● Report Recommendations