

eMaint Boot Camp Training

Overview of eMaint X5

Agenda is subject to change.



Day 1: eMaint X5 Work Management & PMs

8:00 am - 8:30 am	Introduction & Agenda Review
8:30 am - 9:45 am	X5 Interface & Navigation <ul style="list-style-type: none"> • Logging in • Profile Settings • System Structure (Entities vs References) • General System Navigation • Introduction to X5 Tabs & List Views • Creation of Records • Assets & Related Tables / Contacts & Related Tables
9:45 am - 10:00 am	Break
10:00 am - 10:30 am	Hands - On
10:30 am - 11:30 am	Work Order & WO Request Process <ul style="list-style-type: none"> • Work Order Process (Creating, Charging, Completing & Closing) • WO Request Process (Requester User vs Request Link) • Creating WO Requests from QR Codes
11:30 am - 12:00 pm	Hands - On
12:00 pm - 1:00 pm	Lunch
1:00 pm - 2:30 pm	PM Management <u>Calendar Based</u> <ul style="list-style-type: none"> • Single Asset PMs • Multiple Asset PMs (PMs for Parent Assets) <u>Meter Based</u> <ul style="list-style-type: none"> • Asset Meter Setup • Single Asset PMs (Single and multiple Meter types) • Meter Entry (Manual & Import)
2:30 pm - 2:45 pm	Break
2:45 pm - 3:15 pm	Hands - On

3:15 pm - 4:00 pm	Inventory Management <ul style="list-style-type: none"> • Creation of Parts Record • Defining Suppliers • Part Location/ Stock Item setup • Making Adjustments to Inventory
4:00 pm - 4:30 pm	Calendar & Scheduler <ul style="list-style-type: none"> • Overview of Calendars and its Relationship with Records • Overview of X5 Scheduler
4:30 pm - 5:00 pm	Q&A

Day 2: eMaint X5 System Administration

8:00 am - 8:15 am	Agenda Review
9:00 am - 9:30 am	Administrative Features/User Management <ul style="list-style-type: none"> • Overview of Account Settings • Sites, Cultures & Currencies • User Permissions & User Roles
9:30 am - 10:30 am	Form Design <ul style="list-style-type: none"> • Overview of Form Design in X5 (Entities, Forms and References) • Creating New Fields & Editing Existing Fields • Rearranging fields on the Form • System Translations • Managing Columns on List View • Managing Documents and creating Document Fields
10:30 am - 10:45 am	Break
10:45 am - 11:15 am	Hands - On
11:15 am - 12:00 pm	Rules & Email Templates <ul style="list-style-type: none"> • Rules Setup (Send Email Notifications & Auto-populate fields) • Creating Email Templates
12:00 pm - 1:00 pm	Lunch
1:00 pm - 1:30 pm	Hands - On
1:30 pm - 2:15 pm	Data Import & Export <ul style="list-style-type: none"> • Import Data Overview • Spreadsheet prep & Data Import in X5 (Contacts & Assets) • Rotating Shifts with Data Import • Meter Import • Data Export

2:15 pm - 2:45 pm	Hands - On
2:45 pm - 3:30 pm	Reports & Dashboards <ul style="list-style-type: none"> ● Report Creation ● Dashboards & Graphs
3:30 pm - 4:00 pm	Hands - On
4:00 pm - 4:30 pm	Additional X5 Features <ul style="list-style-type: none"> ● Projects ● Purchase Orders ● Interactive Maps
4:30 pm - 4:45 pm	eMaint University & Success Portal
4:45 pm - 5:00 pm	Q&A