

## Avantis.PRO Enterprise Asset Management Training (January 2019 - December 2019)

This document provides the course schedule and fees for the Avantis.PRO Enterprise Asset Management (EAM) training classes covering the period of January 2019 through December 2019. The course descriptions, learning objectives, prerequisites and target audience for each course are provided later in this document as well as information about the on-line registration process.

### Course times

Unless otherwise indicated, all instructor-led classes at one of the training centers run from 8:30 a.m. to 4:30 p.m. local time. Lunch is provided for courses held at one of our Training Centers.

Virtual classes are scheduled to run from 9:00 a.m. – 5:00 p.m. Eastern Time. Three 30-minute breaks are scheduled throughout the course of the day.

Webinars are scheduled to begin at 10:00 a.m. Eastern Time.

### Course locations

Avantis.PRO EAM courses are offered at two different locations for the January 2019 – December 2019 period for those willing to travel, along with an option for attending a virtual class.

Burlington, ON	Lake Forest Learning Center	Virtual Training /Instructor-Led Webinar
1450 Appleby Line Burlington, ON L7L 6V1 Canada  Phone Number: 800-420-1681 Reception Hours: 8:30 – 4:30PM	26541 Rancho Parkway South Lake Forest, CA 92630 USA  Phone Number: 866-998-7246 Reception Hours: 7:30 – 4:30PM	Taken from your home or office. Requires a web browser connection and possibly a telephone connection for the audio portion.

### Course materials

Course materials are included in the registration fee. Participants registering for a virtual training session will be provided with a link to a pdf of the training materials a few days prior to the start of the course.

**NOTE:** There are no materials for Instructor-Led Webinars.

## Course schedule

By Course				
Course	Location	Duration	Start Date	End Date
Avantis.PRO EAM Foundation	Virtual	1 day	16-Jan-19	16-Jan-19
	Virtual	1 day	15-May-19	15-May-19
	Virtual	1 day	22-Oct-19	22-Oct-19
Avantis.PRO EAM Overview	Burlington	5 days	15-July-19	19-July-19
	Burlington	5 days	18-Nov-19	22-Nov-19
Avantis.PRO EAM Cabinet Customization	Virtual	1 day	17-Jan-19	17-Jan-19
	Virtual	1 day	17-Apr-19	17-Apr-19
	Virtual	1 day	24-Oct-19	24-Oct-19
Data Pilot	Instructor-Led Webinar	2 hrs.	7-Feb-19	7-Feb-19
			21-Aug-19	21-Aug-19
			28-Nov-19	28-Nov-19
VIP Mobile Maintenance Overview	Instructor-Led Webinar	2 hrs.	25-Apr-19	25-Apr-19
			6-June-19	6-June-19
			10-Dec-19	10-Dec-19
Avantis.PRO EAM Approvals	Virtual	2 days	12-Feb-19	13-Feb-19
	Virtual	2 days	30-Oct-19	31-Oct-19
Avantis.PRO EAM Maintenance	Virtual	4 days	12-Mar-19	15-Mar-19
	Burlington, ON	4 days	7-May-19	10-May-19
	Lake Forest, CA	4 days	13-Aug-19	16-Aug-19
	Burlington, ON	4 days	3-Dec-19	6-Dec-19

Course	Location	Duration	Start Date	End Date
Avantis.PRO EAM Inventory	Virtual Burlington, ON Lake Forest, CA	2 days	25-Mar-19	26-Mar-19
		2 days	10-Jun-19	11-Jun-19
		2 days	7-Oct-19	8-Oct-19
Avantis.PRO EAM Procurement	Virtual Burlington, ON Lake Forest, CA	3 days	27-Mar-19	29-Mar-19
		3 days	12-Jun-19	14-Jun-19
		3 days	9-Oct-19	11-Oct-19
Crystal Reports Training for Avantis.PRO EAM	Burlington, ON	5 days	22-Jul-19	26-Jul-19
Condition Management	e-Learning	75 min	On Demand	
Avantis.PRO EAM Web Client Forms Designer	e-Learning	60 min	On Demand	
Avantis.PRO EAM Introduction to Web Client	e-Learning	60 min	On Demand	
Configuring Repairable Spares for Avantis.PRO EAM	e-Learning	45 min	On Demand	
Avantis.PRO EAM Web Client Introduction and Navigation	e-Learning	30 min	On Demand	
Avantis.PRO EAM Web Client Dashboards & Add-Ons	e-Learning	30 min	On Demand	
Avantis.PRO EAM Web Client Cabinet Designer	e-Learning	30 min	On Demand	

## Course Fees

The following table shows the fees for each course. Note that the fee for instructor-led courses is in the currency of the country where the course is being delivered. The fee for virtual instructor-led and instructor-led webinars is in US dollars.

The fee for the virtual instructor-led courses reflects an additional cost to cover the provision of individual links to the training database through Skytap. This extra cost is usually more than offset by the savings in travel-related costs. Taxes at the rate of 13% are applied to the courses held in Burlington.

Course Fee				
Name of Course	Duration	Instructor-Led Training Courses		Virtual Instructor-Led (VILT) Training Courses
		Burlington	Lake Forest	
Avantis.PRO EAM Approvals	2 days	Not offered	Not offered	\$US 1,200
Avantis.PRO EAM Cabinet Customization	1 day	Not offered	Not offered	\$US 600
Avantis.PRO EAM Foundation	1 day	Not offered	Not offered	\$US 600
Avantis.PRO EAM Inventory	2 days	\$CDN 1,050	\$US 1,050	\$US 1,200
Avantis.PRO EAM Maintenance	4 days	\$CDN 2,100	\$US 2,100	\$US 2,350
Avantis.PRO EAM Procurement	3 days	\$CDN 1,575	\$US 1,575	\$US 1,775
Avantis.PRO EAM Overview	5 days	\$CDN 2,625	Not offered	Not offered
Crystal Reports Training for Avantis.PRO EAM	5 days	\$CDN 2,625	Not offered	Not offered

Course Fee				
Name of Course	Duration	Instructor-Led Webinars	eLearning (web-based)	
Avantis.PRO EAM Web Client Introduction & Navigation	30 minutes	Not offered	FREE	
Avantis.PRO EAM Web Client Forms Designer	60 minutes	Not offered	FREE	
Avantis.PRO EAM Web Client Cabinet Designer	30 minutes	Not offered	FREE	
Avantis.PRO EAM Web Client Dashboards & Add-Ons	30 minutes	Not offered	FREE	
Avantis.PRO EAM Introduction to Web Client	60 minutes	Not offered	FREE	
DataPilot	2 hrs.	\$US 170	Not offered	
VIP Mobile Maintenance Overview	2 hrs.	\$US 170	Not offered	
Configuring Repairable Spares for Avantis.PRO EAM	45 minutes	Not offered	FREE	
Condition Management	75 minutes	Not offered	FREE	

## Course registration process

Registration is completed through an on-line registration site. Each registrant needs to access the Software Training Services web-site and enter the required information. You will not be able to register if the course is full for the available spaces.

To view the calendar and/or register for a class:

1. Paste <https://sw.aveva.com/training/avantis> into your web browser.
2. Click the **Register Now** button to find out the course offerings and specific information about each course.
3. Click the **Details & Availability** button for the applicable course to see the course outline, a list of the locations, dates and cost.
4. Click the **Add to Cart** button to access the registration screen.

5. Complete the registrant information.

**NOTE:** If this is your first time using the registration system you will be prompted for Student information. This information is used for Student Records. If you have previously registered for an Enterprise Asset Management class, follow the 2<sup>nd</sup> prompt that provides a link to the login screen.

6. Record the payment information.

**NOTE:** To complete your registration, you must provide payment information. There are three payment options: purchase order, credit card or the use of a Customer First (CFIRST) seat.

Once you have completed the registration process you will receive an email confirmation of your registration.

To complete your registration, you must provide payment information. There are three payment options: purchase order, credit card or use of a Customer First (CFIRST) seat for qualifying registrants.

**Purchase order payment option:**

- Type the purchase order number in the ‘purchase order number’ field. If you don’t have the PO number available, type ‘PO’ in the field. The purchase order must be received before you attend the course.
- When creating the purchase order:
  - Reference the course fee excluding taxes on an individual PO line and add ‘plus applicable taxes’ to the bottom of the PO. There are no taxes for courses held in the US.
  - Ensure that the PO indicates the location at which the training will be provided (Burlington, Lake Forest, Virtual or Webinar). This determines the tax rate that applies. All registrations from the same company for the same location can be on the same purchase order even if they cover different courses.
  - When the PO covers multiple registrations, it should detail the individuals and the courses involved.
  - Email a copy of the PO to [training@avantis.net](mailto:training@avantis.net).

The following chart has the PO vendor information for **Instructor-led (ILT) courses** held at either the Burlington, ON or Lake Forest, CA training facilities.

ILT Course held in	Purchase Order Vendor	Currency / Taxes
Canada	Schneider Electric Software Canada Inc. 49 Quarry Park Blvd SE Calgary, AB Canada T2C 5H9	CAN \$  13% HST tax applies
United States	AVEVA Software, LLC 26561 Rancho Parkway South Lake Forest, CA USA 92630	US \$  No taxes

The following chart has the PO vendor information for **Virtual Instructor-Led (VILT) courses** and **Instructor-Led Webinars** regardless of the location of the registrant.

Purchase Order Vendor for a VILT course	Currency / Taxes
AVEVA Software, LLC 26561 Rancho Parkway South Lake Forest, CA USA 92630	US \$  No taxes

**Credit card option:**

The following table explains the basic steps to follow when paying by credit card for an Instructor-led training course.

Credit Card Payment Procedures for an Instructor-Led Training Course		
ILT Course Location	Currency / Taxes	Procedures
United States	US \$ / No taxes	Enter the credit card information directly into the registration site. This will be processed through PayPal.
Canada	CAN \$ / 13% HST added	Enter 'credit card' or 'CC' in the purchase order number field. We will contact you by telephone for the credit card information.

The following table explains the basic steps to follow when paying by credit card for a VILT courses and Instructor-Led Webinars.

Credit Card Payment Procedures for a Virtual Instructor-Led Training Course and Webinars	
Currency / Taxes	Procedures
US \$ / No taxes	Enter the credit card information directly into the registration site. This will be processed through PayPal.

**CFIRST seat option:**

Record **CFIRST** in the purchase order number field. This will be validated by the Customer First program and you will be contacted if there are any issues.



## **Class cancellation by AVEVA**

It is recommended that you do not make travel arrangements for an ILT class until 2 weeks prior to the start of the course. AVEVA reserves the right to cancel classes up to two weeks prior to the start of the class based on course registration level.

## **Cancelling your registration**

If your plans change and you cannot attend as scheduled, be sure to notify us as soon as possible at [training@avantis.net](mailto:training@avantis.net) so that we can free up your spot for another person wanting to take the course.

Class sizes are limited so tuition charges are refunded ONLY if cancellation notice is received by the training department through [training@avantis.net](mailto:training@avantis.net) at least two weeks prior to the first day of class. If cancellation is made less than two weeks before the date of the class, a service charge of 50% of the tuition may be assessed. Those failing to attend the class without cancellation notice prior to the class will be liable for the full cost of the course.



# Avantis.PRO EAM Maintenance

## Course Description

The Enterprise Asset Management Maintenance course is a 4-day, instructor-led class designed to provide a fundamental understanding of the core maintenance-related features and functionality. The course combines lectures, discussions and hands-on labs to supply and reinforce the knowledge necessary to use the Enterprise Asset Management Maintenance application to create and manage entities, to initiate, plan and track maintenance activities, and to create and trigger preventive maintenance programs on critical assets. It also covers other basic functions such as the creation and use of standard activity lists, the recording of time cards, statistic readings and equipment activities, as well as the closing of work orders.

## Learning objectives

Upon completion of this course, you will be able to:

- Create entity records
- Create warranty records
- Create standard activity listings
- Create standard procedure / safety records
- Create work requests
- Create emergency work orders
- Create and plan work orders with tasks, trades, parts, activities and standard procedures/safety
- Create and plan preventive maintenance (PM) programs with tasks, trades, parts, activities and standard procedures/safety
- Link PM tasks with entities and define elapsed time, statistic-based triggering frequencies and relational triggering links
- Trigger PM programs
- Create trades and maintain trade rates
- Create schedules and add both trade availability and work
- Initiate material fulfillment requests (pick lists and requisitions)
- Monitor material availability
- Record, post and correct time cards
- Record and post statistic readings including initial life-to-date readings, regular readings and corrections
- Record meter replacement readings
- Record equipment activity records
- Record basic equipment failure information
- Close work orders

- Monitor open work and maintenance history
- Introduction to the isolation process (LOTO) functionality
- Configure key maintenance-related lists and business policies

### **Audience**

- New users of EAM requiring a generic knowledge of the core maintenance functionality
- Existing users of EAM maintenance who lack formal product application training and require a better understanding of the functionality
- Core team members responsible for configuring the EAM software to reflect maintenance-related processes

### **Prerequisites**

- Some experience in navigating the Enterprise Asset Management software and in using cabinets to find records
- Familiarity with a corporate maintenance environment

# Avantis.PRO EAM Inventory

## Course Description

The Enterprise Asset Management Inventory course is a 2-day, instructor-led (in-person or virtual) class designed to provide a fundamental understanding of the core MRO inventory-related features and functionality. The course combines lectures, discussions and hands-on labs to supply and reinforce the knowledge necessary to use the EAM Inventory application to: create and manage item records, replenish MRO inventory parts, issue and receive parts, perform cycle counts, adjust inventory balances and transfer parts between storerooms.

## Learning objectives

Upon completion of this course, you will be able to:

- Create item records
- Create purchase catalog items from item records
- Define storeroom information including bin locations and replenishment settings
- Generate replenishment reports
- Create requisitions
- Record receipt transactions and returns to vendor
- Record issue transactions and returns to stock
- Record receipt and issue transactions for serialized inventory
- Manage pick lists and put them into a logical picking sequence
- Issue MRO parts with or without the use of a pick list
- Adjust inventory balances and/or valuations
- Reclassify items
- Generate cycle count sheets, record inventory counts and update item balances
- Record opportunity counts
- Transfer items between storerooms
- Create standard parts lists
- Analyze inventory part usage
- Monitor material availability through open purchase orders
- Configure key inventory-related value lists and business policies

## Audience

- New users of EAM requiring a generic knowledge of the core inventory functionality
- Existing users of the EAM Inventory application who lack formal training and require a better understanding of the functionality



- Core team members / power users responsible for configuring / adjusting the EAM software to reflect an organization's inventory-related processes

### **Prerequisites**

- Some experience in navigating the EAM application and in using cabinets to find records
- Familiarity with the corporate inventory processes

# Avantis.PRO EAM Procurement

## Course Description

The Enterprise Asset Management Procurement course is a 3-day, instructor-led class designed to provide a fundamental understanding of the core procurement-related features and functionality. The course combines lectures, discussions and hands-on labs to supply and reinforce the knowledge necessary to use EAM Procurement to: create and maintain vendor records, purchase catalog items and vendor resource records. It also covers the creation and processing of requisitions, purchase orders and invoices.

## Learning objectives

Upon completion of this course, you will be able to:

- Create vendor records
- Create purchase catalog items
- Create vendor resources
- Create / review / process requisitions
- Create purchase orders
- Set up multi-delivery PO lines
- Manage purchase order changes (both tracked and non-tracked)
- Create and manage contracts
- Manage contract changes
- Analyze material usage
- Define and manage request for quotations
- Monitor vendor performance
- Create and define performance report cards
- Manage the expediting of purchase orders and track open commitments
- Understand the receiving process and the impact on the Received-not-invoiced (RNI) account balance
- Enter, balance, post and correct PO-related invoices
- Enter and post miscellaneous invoices
- Configure key procurement-related value lists and business policies

## Audience

- New users of EAM requiring a generic knowledge of the core procurement functionality
- Existing users of the EAM Procurement application who lack formal training and require a better understanding of the functionality



- Core team members / power users responsible for configuring / adjusting the EAM software to reflect procurement-related processes

### **Prerequisites**

- Some experience in navigating the EAM software and in using cabinets to find records
- Familiarity with the corporate procurement processes

# Avantis.PRO EAM Foundation

## Course Description

The Enterprise Asset Management Foundation course is a 1-day, instructor-led (in-person or virtual) class designed to provide a solid understanding of the configurable features available for tailoring the EAM software to meet client-specific business processes. The course combines lectures, discussions and hands-on labs to supply and reinforce the knowledge necessary to perform various set up activities including: multi-site environments, employee records, security profiles, desktops, business policies, value lists, categories, add-ons and basic notifications. It also includes a discussion on the way that the EAM software tracks G/L segments and generates G/L account transactions.

## Learning Objectives

Upon completion of this course, you will be able to:

- Understand the implications of multi-site functionality across the application
- Set up multiple sites
- Create employee records
- Create security profiles
- Create desktops
- Create categories
- Adjust business policies and define object numbering rules and default account numbers
- Create add-on fields
- Set up key system-wide value lists
- Modify message severity and content
- Understand the chart of accounts, the GL tracking options and the generation of GL account transactions

## Audience

- Core team members responsible for the initial configuration of EAM
- Functional power users who require a deeper understanding of the underlying configuration
- Designated EAM System Administrators responsible for maintaining the system configuration

## Prerequisites

- An understanding of the corporate environment and business processes as they relate to at least one of the following functional areas: maintenance, inventory or procurement
- Basic EAM navigation skills are a benefit but not a requirement

**NOTE:** Technical skills are NOT a requirement

# Avantis.PRO EAM Overview

## Course description

The Avantis.PRO EAM Overview course is a 5-day, instructor-led class designed to introduce the Avantis.PRO Enterprise Asset Management (EAM) application and the role it can play in helping to manage the maintenance of equipment and improve equipment uptime. The course covers concepts encountered throughout Avantis.PRO EAM, foundational configuration functions such as sites, value lists and security profiles. The course also covers the core functionality available through the Maintenance, Inventory and Procurement modules and introduces some of the other supporting functions that are available. This course does not provide hands-on training, although computers\* will be provided so that participants can follow along during product demonstration.

## Learning objectives

Upon completion of this course, you will be able to:

- Define foundational configuration
- Define an entity record
- Describe the use and function of a work request
- Define and plan a work order with tasks, requirements and supporting documents
- Define a preventive maintenance (PM) program
- Describe the setup of various PM task triggering link options
- Work with PM forecasting and PM Trigger
- Work with Maintenance transactions
- Identify work order closing activities
- Define the use and purpose of the Item record
- Work with various Inventory transactions
- Work with and define Procurement master files
- Describe the use and function of a requisition
- Describe the use and function of a purchase order

## Audience

- Individuals requiring an understanding of key functionality and use of the Avantis.PRO EAM application

## Prerequisites

- Basic navigation skills



# Avantis.PRO EAM Cabinet Customization

## Course Description

The Enterprise Asset Management Customization course is a 1-day, instructor-led (in-person or virtual) class designed to provide the knowledge and skills required to modify existing cabinets/views and to create new ones. In addition to defining filters, columns and sorting order criteria, participants will also learn how to create special types of cabinet views (grouping, summary, averages) and how to deal with challenges in views that include different levels of the entity hierarchy and/or different cost groups. Participants will also have an opportunity to work on a view of their own choosing.

## Learning Objectives

Upon completion of this course, you will be able to:

- Understand the impact of an expanded vertex when creating / modifying cabinets
- Understand the vertex structure for the following object types: entity, work request, work order, work order task, PM job, PM task, item record, inventory transactions, labor transaction, purchase order, purchase order line, vendor
- Copy an existing cabinet and create a cabinet from scratch
- Create new cabinet views
- Define cabinet and view level filters
- Define prompted filters
- Define columns to be displayed and the column names
- Define the default sorting order for cabinet views
- Create cabinet views that group the displayed results
- Create summary cabinet views
- Create cabinet views that display averages
- Create cabinet views that display results from different levels of the entity hierarchy or by cost group
- Make a new cabinet available to end-users by adding it to a desktop

## Audience

- Core team members responsible for the initial configuration of the EAM software
- Functional power users who have a responsibility for creating custom cabinets/views
- EAM System Administrators



## Prerequisites

- An understanding of the corporate environment and business processes as they relate to at least one of the following functional areas: maintenance, inventory or procurement
- Familiarity with at least one of the functional areas of the EAM software: maintenance, inventory or procurement

**NOTE:** Technical skills are NOT a requirement

# Crystal Reports Training for Avantis.PRO EAM

## Course Description

The EAM Crystal Reports Training course is a 5-day, instructor-led in-person class designed to cover a wide range of introductory and intermediate level design and implementation concepts relating to the use of Crystal Reports in conjunction with the EAM software. The course combines lectures, discussions and hands-on labs to supply and reinforce the knowledge necessary to set up the design environment, understand the database fundamentals, use Crystal Reports specific design concepts and tools, understand special functions, formulas and report deployment techniques used in the EAM application and gain an understanding of the data schema of the EAM database. The course also provides time for the instructor and students to work on one or more reports of interest to the class from the design stage through to deployment.

## Learning Objectives

Upon completion of this course, you will be able to:

- Set up the report development environment including the data source connections, registry settings and designer preferences
- Understand the EAM Report Viewer versus Crystal Reports Designer
- Locate the file locations of built-in versus custom reports
- Understand the report development cycle
- Understand various Crystal Reports design concepts such as working with tables, field controls, formatting, formula composition, data sorting, grouping, filtering and other data-shaping techniques
- Understand special EAM report functions and formulas
- Understand and work with standard object reports, report object reports, cabinet report functionality and the reporting on EAM add-ons
- Understand the table structure of the EAM database
- Apply the design cycle for a custom report from design through deployment

## Audience

- Individuals assigned the responsibility for creating/maintaining custom reports using the Crystal Reports Designer application

## Prerequisites

- Familiarity with the Crystal Reports Designer application
- Familiarity with at least one of the functional areas (Maintenance, Inventory or Procurement) of the EAM software
- Familiarity with basic system administration functions in the EAM software
- An understanding of the specific business reporting requirements for at least one of the functional areas

# Avantis.PRO EAM Approvals

## Course Description

The Enterprise Asset Management Approvals course is a 2-day, instructor-led (in-person or virtual) class designed to provide a solid understanding of the configuration and use of the EAM Approvals module. This course covers the use of configurable features within the Approvals module, the setup required in EAM to support approvals, the creation of different types of approval routes including the supporting cabinet views, the use of the Approval InBox (web browser option) and the maintenance of substitute approvers.

## Learning Objectives:

On completion of this course, you will be able to:

- Define the policies within the EAM Approvals module
- Change related business policies, employee records and trades in the EAM core product to support approvals
- Create custom cabinet views for use with approval routes
- Define the following types of routes:
  - Auto-approval routes
  - Employee hierarchy-driven approval routes
  - Linear, multi-level, value-based approval routes
  - Routes that include the need for concurrent approvers
  - Routes using a role responsibility rather than a named approver
- Use the Approval InBox to:
  - Approve
  - Reject
  - Forward
  - Hold
  - Defer
- Define a substitute approver
- Review the approval history of a document

## **Audience**

- Core team members and/or System Administrators responsible for the initial configuration and/or ongoing maintenance of approval routes using the EAM Approvals module

## **Prerequisites**

- An understanding of the corporate environment and approval routing processes
- Basic EAM navigation skills and familiarity with the use of the EAM software for at least one of the following functional areas: Maintenance, Inventory, Procurement
- Completion of the EAM Cabinet Customization course or familiarity with the steps for creating a custom cabinet / cabinet view

**NOTE:** Technical skills are NOT a requirement

# Avantis.PRO EAM Web Client Introduction and Navigation

## Course Description

The Enterprise Asset Management Web Client Introduction is an EAM eLearning course that introduces the new web based Release 6. The course is designed to provide a solid understanding of the web client workspace structure and its many features.

## Learning objectives

Upon completion of this course, you will be able to:

- Navigate the workspace structure
- Work with the workspace
  - Display your workspace
  - Define settings using the User Management menu
  - Navigate with tabs
  - Work with your Favorites List
    - **NOTE:** As of R6.0.2, Favorites is renamed to Bookmarks
  - Work with Recently Viewed List
  - Access Online Help
  - End an Avantis.PRO session
- Work with objects – Forms
  - Explain the form layout
  - Work with Actions
  - Link Attachments
  - Work with the OLE Canvas View
  - Work with selector cabinets
- Work with the cabinet viewer
  - Access a cabinet
  - Explain how cabinets are structured
  - Describe the icons on a cabinet
    - **NOTE:** As of R6.0.2, Modify icon for cabinets is renamed to Cabinet Settings
  - Define filters
  - Select cabinet menus

- Modify and save a cabinet layout
- Work with cabinet actions
- Create a favorites Link
- Work with Dashboards
- Launch data using hyperlinks
- Use the cabinet linking feature
- Export a cabinet view to Excel and to PDF
- Demonstrate the use of the Entity Hierarchy Link

### **Audience**

- New users of EAM Release 6.0 and higher

### **Prerequisites**

- None



# Avantis.PRO EAM Client Forms Designer

## Course Description

The Enterprise Asset Management Web Client Forms Designer course is a 60-minute eLearning course that provides the knowledge and skills required to create and update custom object forms to fit your company's specific needs. This course combines lecture and demonstration to explain the configuration features of the forms designer.

## Learning objectives

Upon completion of this course, you will be able to:

- Create a Form
  - Add general information
  - Set security
  - Add tabs
    - Add and modify columns
    - Add cabinet views
    - Add predefined UIs
    - Add URL links
  - Add actions permitted for the form
  - Set cabinet parameters
- Use the Actions button on the Browse Tree
  - View attribute details
  - Add and modify rules
  - Add and modify actions
  - Work with forms
  - Add calculated attributes
  - Manage data models

## Audience

- Core team members and System Administrators responsible for the configuration and/or ongoing maintenance of custom forms

## Prerequisites

- EAM Web Client Introduction and Navigation

# Avantis.PRO EAM Introduction to Web Client

## Course Description

The Introduction to Avantis.PRO Web Client course is a 60-minute eLearning course designed to introduce Web Client. In this course you will be introduced to the features and flexibility of Web Client and how this can benefit users. This course combines lecture and demonstration to explain Web Client.

## Learning Objectives

Upon completion of this course, you will be able to:

- Identify the characteristics of the Web Client as they relate to
  - Dashboard
  - Workspace
  - Cabinet
  - Form
  - Object
  - Help
- Understand how the Web Client benefits users

## Audience

- New users of Avantis.PRO Release 6.0 and higher or Classic users interested in upgrading to the Web Client

## Prerequisites

- None

# Avantis.PRO EAM Web Client Cabinet Designer

## Course Description

The Enterprise Asset Management Web Client Cabinet Designer course is a 30-minute eLearning course that provides the knowledge and skills required for updating and creating custom cabinets and cabinet views in EAM R6 Web. This course explains what Cabinet Designer is, how to create, edit and delete cabinets, and demonstrates how to set up rules.

## Learning objectives

Upon completion of this course, you will be able to:

- Understand the Cabinet Designer
- Work with the Cabinet Designer
  - Create a custom cabinet
  - Understand the Cabinet Designer Layout
  - Use the Browse Tree
  - Edit a custom cabinet
  - Edit a view in a cabinet
  - Set up Color and Email Rules
  - View Results in the Cabinet Viewer

## Audience

- Core team members and System Administrators responsible for the configuration and/or ongoing maintenance of custom cabinets

## Prerequisites

- EAM Web Client Introduction and Navigation

# Avantis.PRO EAM Web Client Dashboards & Add-Ons

## Course Description

The Web Client Dashboards and Add-Ons course is a 30-minute eLearning course that provides the knowledge and skills required for creating and updating Dashboards as well as creating Add-Ons and applying them on Forms. The course explains what a Dashboard and Add-Ons are, how they are utilized, how they are created and edited, as well as displayed.

## Learning Objectives

- Describe the use of a Dashboard
- Define Cabinet Data for Dashboard
- Implement a Dashboard
- Create a 3-Panel Display
- Create a Dashboard Count
- Describe the use of Add-Ons
- Create Add-On Data Model
- Link Add-On to Object Form

## Target Audience

- Core team members and System Administrators responsible for the configuration and/or ongoing maintenance of Dashboards and Add-Ons

## Prerequisites

- Avantis.PRO Web Client Cabinet Designer eLearning course or Avantis.PRO Web Client Form Designer eLearning course

# Configuring Repairable Spares for Avantis.PRO EAM

## Course Description

Configuring Repairable Spares is an EAM eLearning course that describes the steps to configure repairable spares in Enterprise Asset Management. The course is designed to provide an understanding of how EAM can be configured to manage repairable spares. The course combines both lecture and demo to explain the different options for managing repairable spares in the EAM software and to outline the configuration required for each option.

## Learning Objectives:

On completion of this course, you will be able to:

- Describe a repairable spare
- Define the different options available for managing repairable spares
- Configure Enterprise Asset Management to manage repairable spares
- Describe the business flow for a repair
- Discuss the decisions that must be made

## Audience

- Core team members responsible for managing and tracking repairable spares

## Prerequisites

- An understanding of the corporate environment as it pertains to repairable spares
- Basic EAM navigation skills and familiarity with the use of the EAM software in at least one of the following functional areas: Maintenance, Inventory

# VIP Mobile Maintenance Overview

## Course description

The VIP Mobile Maintenance course is a 2-hour, instructor-led class designed to provide an overview of the maintenance-related features and functionality in VIP Mobile. The course combines lecture and demonstration to supply and reinforce the knowledge necessary to use VIP Mobile to track and complete task activities, record statistic readings and time cards with picture attachments. It also covers other basic functions such as viewing entity history and the creation of follow up work requests and work orders.

## Learning Objectives:

On completion of this course, you will be able to:

- View work order and entity information
- Perform task activities
- Record statistic readings
- Enter timecards
- Create and attach picture attachments
- Create follow up work requests
- Create work orders

## Audience

- New users of VIP Mobile requiring knowledge of the handheld functionality

## Prerequisites

- None

# DataPilot

## Course Description

The DataPilot Overview course is a 2-hour, instructor-led class designed to provide an overview of the features and functionality in DataPilot. The class combines lecture and demonstration to supply and reinforce the knowledge necessary to use DataPilot to build Excel spreadsheets for creating new objects and making mass changes to existing EAM objects. It also covers other basic functions such as the creation of Enterprise Asset Management add-ons, transactions, value lists and category values.

## Learning Objectives:

On completion of this course, you will be able to:

- Create a new object
- Update an existing object
- Create an add-on
- Add values to a value lists
- Add category values
- Create transactions
- Update un-posted transactions
- Post transactions
- Use cabinets for data cleanse
- Troubleshoot spreadsheet messages

## Audience

- New users of DataPilot requiring knowledge of the core functionality
- Existing users of DataPilot who lack formal product training and require a better understanding of the functionality
- Core team members responsible for configuring the EAM software to understand and leverage the benefit of DataPilot

## Prerequisites

- Some experience in navigating the EAM software and in using cabinets to find records

# Condition Management

## Course Description

The Condition Management course combines both lecture and demo to explain the basic use of the Condition Management tool and to outline the different configuration options that are available for bridging the gap between selected plant floor devices that are measuring the status of a piece of equipment and your Enterprise Asset Management software.

## Learning Objectives:

On completion of this course, you will be able to:

- Explain the purpose, structure, concepts and some key benefits of the Condition Management application
- Explain the purpose and use of the Controller, Monitor Service and Administrator programs
- Use the Configurator program to set up basic associations between plant floor device readings and the EAM
- Work with the Client Screens program

## Audience

- Planners, Schedulers and Maintenance Supervisors
- Key individuals in the Operations and IT Organization
- New and existing users of Condition Management

## Prerequisites

- An understanding of your EAM system and business processes