

# iMaint® Training Catalog

Contact your Account Manager to check course availability or enroll. Or, contact our corporate headquarters:  
 1-877-304-0431 (U.S. & Canada) sales@dpsi.com

**ON-SITE COURSES: one- or two-day courses must be purchased in combination with another training course, for a minimum of three consecutive days on-site. Students will use the User Guide, System Administrator Guide, or supplied training guide.**

	Length	At Your Site	At DPSI	Web-Based
<b>COURSES</b>				
<b>iMaint Implementation Assessment &amp; Project Planning Consultation</b>	3 days	✓	x	x
Our experienced Consultant will work with you and your team to identify the most critical areas affecting your maintenance organization, ensuring that you get the most out of iMaint and maximize the return on your investment. We will discuss the characteristics of a successful Enterprise Asset Management (EAM) system, define how to use iMaint in the most efficient manner, and develop a roadmap for implementation and improvement. You will gain a good understanding of how iMaint can automate processes for Work Orders, Inventory Control, Purchase Requisitions and Purchase Orders at your site.				
<b>iMaint Administrator Workshop</b>	4 days	✓*	x	x
This workshop will help your iMaint administrator establish site defaults for personnel, general ledger accounts, inventory, purchasing, and work orders. This will “kick start” your iMaint project and provide a structured method of implementation for the personnel involved with iMaint. At the conclusion of the workshop, you will understand how to modify basic system settings, create user groups, Form Designer, create new users, and have a good understanding of the iMaint process for work orders, inventory control, and purchasing. * You can add a day and the DPSI Project Manager will help your database administrator install and configure iMaint on your SQL Server database.				
<b>Working with iMaint</b>	5 days	✓	✓	x
This overview and introduction to the iMaint environment uses a working model of a populated iMaint installation. This hands-on workshop introduces students to all primary modules of iMaint. Students will learn how to develop a model maintenance program and understand iMaint functionality. They will build new master records and create a functional system that they will use throughout the class, culminating in management reports that illustrate the results of their input.				
<b>Working with iMaint Dashboard</b>	2 days	✓	✓	x
This class covers the real-time visual information that the Dashboard module allows your company to capture and display to assist in making timely business decisions. Presentations, demonstrations and hands-on exercises develop your understanding and abilities to use dashboards to their highest level.				
<b>Software Audit and Data Evaluation</b>	5 days	✓	x	x
DPSI’s expert consultant will evaluate in detail how you are currently utilizing iMaint or iMaint Fleet. An evaluation of the most critical areas affecting your maintenance organization, to ensure that you maximize the return on your investment, is part of the Audit. When we find areas that can be improved, we will work with you to get better results with less effort, and offer ideas on how to get the most out of your software and make your maintenance operations run smoother.				
<b>Working with iMaint Mobile</b>	1 day	✓	x	x
The iMaint Mobile add-on extends the capabilities of iMaint to a handheld computer. Go paperless by downloading Work Orders and Physical Inventory count lists, entering Work Order details and counts, and uploading the data back into iMaint. Your iMaint Administrative Training program can be augmented with this one-day program, giving you the tools needed to successfully gain the most value from iMaint Mobile.				

	Length	At Your Site	At DPSI	Web-Based
<b>COURSES</b>				
<b>Working with iMaint Integrator</b>	2 days	✓	x	x
The iMaint Integrator allows you to establish communication between iMaint and other applications. Data can be shared using industry-standard formats, including XML, SQL Server, Excel, Access and text-delimited files. The course covers setting up and scheduling data transfers, file and database options, selecting data in iMaint, data mapping and more. <b>**On-site training is 3 days and includes assistance with implementation and initial data mapping.</b>				
<b>iMaint Advanced Workshop</b>	3 days	✓	x	x
This three-day course uses hands-on exercises to teach students the basic elements of the iMaint architecture, how to effectively use the tools available in iMaint Admin, the power of Status Codes, Resource Allocation, and a brief introduction to the iMaint Integrator and ActiveReports.				
<b>Working with iMaint ActiveReports</b>	2 days	✓	✓	✓
Through presentations, demonstrations, and hands-on exercises, this course introduces you to iMaint ActiveReports, and guides you to safely tailor existing reports and create basic reports. The course covers iMaint relational database design and table structure and how to use iMaint ActiveReports. Employing a hands-on approach, students build and run reports on an iMaint database. Participants are asked to submit requests and reports that they would like to see edited or created.				
<b>The Power of iMaint Codes</b>	2 days	✓	x	x
Codes are one of the most underused, yet most powerful, iMaint features. They enable you to categorize failures, solutions, delays, problems, downtime or any activity in a consistent manner. There are many types of Codes and you control how they're defined and used. This course will be very interactive and the content will be tailored to the needs of participants.				
<b>PMC to iMaint Workshop</b>	5 days	✓	x	x
Converting from PMC to iMaint is a simple process. DPSI provides a utility to automatically move your data from PMC into iMaint while this five-day workshop will provide instruction on the differences between PMC and iMaint and provide a solid foundation for using iMaint. Students will learn the terminology of iMaint, how to set up Users, creation of custom navigation and tab suppression trees, how to make field label changes, and establishing site options. You will also learn about the enhancements of many of your favorite features such as the advanced scheduling methods, costing without charging to a work order, and tracking of components or serialized parts.				
<b>Working with Work Orders and Scheduling</b>	3 days	✓	✓	✓
Develop a solid understanding of Work Order and Scheduling modules and how your organization can best put them to use. Topics will include Work Order "building blocks", assigning parts and labor to a Work Order, optimal iMaint site setup, documenting and reporting on completed work, generating Work Orders from a schedule, managing labor resources, work types, work Codes, on-demand Work Orders, scheduling and more.				
<b>Working with Purchasing and Inventory</b>	2 days	✓	✓	✓
Learn how to best use the Purchasing and Inventory modules of iMaint. Course topics will include warehouses and parts locations, optimal iMaint site setup, part master information, inventory adjustments, reporting on parts, suppliers and manufacturers, warranty providers, creating purchase requisitions and purchase orders, part naming conventions and more.				
<b>Establishing Key Performance Indicators (KPIs) and Root Cause Analysis (RCA) in iMaint</b>	2 days	✓	x	x
<p><i>Day 1: KPIs.</i> Using industry standard metrics, you'll learn how to create and track KPIs in iMaint. Then you can decide what needs to be tracked for your company. <i>Day 2: Root Cause Analysis.</i> Why does equipment fail and how do you find out the cause of the problem? Before starting a Root Cause Analysis program, you must capture accurate data. This session will review the information needed to get you on your way to using Root Cause Analysis and iMaint as tools to accomplish this.</p>				

	Length	At Your Site	At DPSI	Web-Based
<b>COURSES</b>				
<b>Working with iMaint Form Designer</b>	<b>2 days</b>	✓	x	x
<p>The Form Designer allows you to customize and simplify iMaint for users who do not need the full functionality of the iMaint system. Learn how to customize forms in iMaint and understand of how the table structures are related to customizing forms. The course also explains how to implement a custom form by using custom navigation trees, security permissions and importing/exporting forms within iMaint.</p>				

### iMaint Fleet Courses

<b>FleetMaint to iMaint Fleet Workshop</b>	<b>5 days</b>	✓	x	x
<p>Converting from FleetMaint to iMaint Fleet is a simple process. DPSI provides a utility to automatically convert your data, while this five-day workshop will teach you the differences between the products and provide a solid foundation for using iMaint Fleet. Students will learn the terminology of iMaint Fleet, User setup, creation of custom navigation and tab suppression trees, changing field labels, and establishing Site options. You'll also learn about enhancements to many of your favorite features such as advanced scheduling methods, costing without charging to a work order, and fuel tracking.</p>				

## Web-Based Training and Consulting

With remote Web-based training, you simply need a computer with Internet access and a telephone for calling a toll-free conference line. Login to a secure website, and you'll have a real-time view of our Instructor's computer screen. You can even allow the Instructor to remotely control your computer. This will not be a one-way session—you'll gain hands-on experience with your software, converse with your Trainer and ask questions. Several people can take part at one computer for the price of a single login. Students can also be at multiple computers; a separate login is needed for each computer used.

**Web-based courses and consulting must be booked in blocks of at least 3 hours. To meet this minimum, you can mix-and-match courses, choose a custom curriculum, or combine courses and consulting.**

### CUSTOMIZED TRAINING AND CONSULTING

#### 100% Personalized to Your Specific Needs

We'll discuss your needs and objectives, then create sessions that deliver what you need. Tell us what you want from your iMaint system, and we'll show you how to make it happen. Not sure what you want from iMaint? We can help you set goals that make sense for your organization. Whether the need is big or small, our expert Consultants and Instructors can help.

*The courses below will be adapted by your Instructor to best fit the needs of the students.*

### HIGH-LEVEL OVERVIEWS

#### Getting Started

##### Deciding What You Want iMaint to Do for You

Discuss goals & objectives • Smart Coding • Suggested order for data entry

**4 hours**

##### Navigation and How to Use iMaint

Login and iMaint menu • Help and other resources • Search and display records • Form content and grids

**2 hours**

##### Admin

Creating users • Creating navigation trees • Tab suppression • Corporate tree setup • Label changes

**3 hours**

##### Setup

Creating business addresses • Financial periods • Resource defaults • Work Order defaults • Inventory defaults

**3 hours**

##### Utilities

Error and activity Logs • User configuration • Delete assets • Status change logs • Asset location change logs • Meter logs • User-defined fields • Period-end processing • VMRS import

**3 hours**

#### Building Blocks

##### Understanding Additional Information

Buildings • Departments • Countries • States • Currency • Address types • Contact types • Meter types • Work types • Tools • Other costs • Miscellaneous costs • Priority • Reasons • Attachments

**1 hour**

##### Codes and Code Types Overview

Asset codes • Procedure codes • Work Order codes • Generating a Work Request via codes

**2 hours**

##### Understanding Status Codes

Work Orders • Purchase Orders • User profiles • Assets • Parts • Components • Tools • Tasks • Procedures • Projects • Schedules • Contacts

**2 hours**

##### General Ledger

Site Financial Setup • General Ledger accounts • Using General Ledgers on Work Orders • Using General Ledgers on Purchase Orders • Viewing cost transactions

**2 hours**

##### Employees

Contact types • Crafts • Shifts • Pay types • Labor grades

**1 hour**

##### Customers

Internal customers • External customers • Customers on Work Orders

**1 hour**

	Length
<b>Projects</b> Setting up projects • Status • Applying estimates • Applying charges	<b>1 hour</b>
<b>Procedures and Tasks</b> Creating procedures and procedure types • Creating tasks libraries • Using codes with procedures	<b>1 hour</b>
<b>Working With iMaint</b>	
<b>Assets / Units</b> Assets • Asset types • Asset locations • Asset groups • Lines • Other costs • Meter update • Meter rollover • Meter types • Code types and codes • Warranty types • Priority • Customers • User-defined fields	<b>2 hours</b>
<b>Quick Work Orders</b> Procedure and tasks overview • Priority • Work types • Problem types • Code types and codes overview • Misc. costs overview • Resource overview • Parts overview	<b>2 hours</b>
<b>Full Process Work Orders</b> Work types • Priority • Problem types • Customers • Procedure and tasks overview • Code types and codes overview • Misc. costs overview • Resource overview • Parts overview • Tool overview • Work Order status • User-defined Fields	<b>3 hours</b>
<b>Scheduling</b> Work types • Asset overview • Procedure overview • Scheduling methods • Generate Proof • Review Proof • Create Work Orders • Print Work Orders • Clear Proof • Calendar lockout	<b>2 hours</b>
<b>Work Requests</b> Creating requests • View/process requests • Display requests • Request alert • Problem level • Problem types • Setting up alert levels	<b>2 hours</b>
<b>Inventory</b> Quick Parts • Parts • Part class • Warehouses • Reorder Methods • Adjustments • Vendors • Manufacturers • Warranty types • Warranty providers • Physical Inventory	<b>6 hours</b>
<b>Purchasing</b> Purchase requests • Generate/review Proof • Purchase Orders • Receiving Orders • Common carriers • Payment terms • Vendors	<b>3 hours</b>
<b>Fuel</b> Fuel entry–manual • Fuel receipts–manual • Fuel transfers–manual • Fuel Master • Setup–import • Move to iMaint–import • Review data–import • Apply data–import	<b>1 hour</b>
<b>Reports / Graphs</b> Reports • Graphs • Categories	<b>1 hour</b>
	Length
<b>ADVANCED TOPICS</b>	
<b>Resource Allocation</b> Shifts • Resource availability • Status Codes • Assigning resources to Work Orders	<b>3 hours</b>
<b>Batch Work Order Completion</b> Selecting Work Orders • Applying parts, labor & miscellaneous costs • Completing Work Orders	<b>1 hour</b>
<b>Physical Inventory</b> Selecting parts • Applying counts • Reconciliation	<b>1 hour</b>
<b>Scheduling</b> Review of current practices • Setting up schedules • Working with scheduling • Advanced scheduling methods • Auto-generation of Work Orders through Work Order completion	<b>6 hours</b>
<b>Work Orders</b> Review of current practices • Setting up corrective and emergency Work Orders • Working with corrective and emergency Work Orders • Reports generated from data you're collecting	<b>6 hours</b>
<b>Inventory</b> Review of current practices • Setting up inventory • Working with inventory • Physical inventory	<b>6 hours</b>

<b>Purchasing</b>	<b>6 hours</b>
Review of current practices • Setting up and working with inventory • Purchase Requests • Auto Generation • Purchasing process • Blanket Purchase Orders	

<b>Web-Based Courses</b>	<b>Length</b>
<b>SPECIALIZED TOPICS</b>	
<b>Setting Up Fleets</b>	<b>6 hours</b>
Course will guide you through all elements of your fleet implementation. This includes any elements unique to your specific fleet operation such as VMRS codes, user-defined fields, unit type fueling configurations, naming conventions, Fueling, interfaces to GasBoy and other fueling software, and any other Fleet specific type of setup.	
<b>Web Purchase Requester Module</b>	<b>3 hours</b>
This session guides you through setup and configuration of this module, which allows anyone with Web access to submit purchase requests.	
<b>Web Work Requester Module</b>	<b>3 hours</b>
This session guides you through setup and configuration of this module, which allows anyone with Web access to submit internal work requests.	