



# EAM eLearning

*Instructor-led online Infor EAM software training*

EAM eLearning from SwainSmith is designed for companies on the move that want to get the most out of Infor EAM. With EAM eLearning, you get one-on-one training from Infor EAM certified instructors via a live virtual environment, on your schedule and at your pace. Learn to use Infor EAM like a pro—and find out how to maximize its value for your organization.

## Contents

<b>Program Overview</b> .....	2
EAM eLearning Curriculum .....	2
Empowering EAM Success .....	2
Certified EAM Professional Program.....	2
What Makes EAM eLearning a World-Class Program?.....	3
Five Reasons to Choose EAM eLearning.....	4
<b>Course Offerings</b> .....	5
Administration Track (9 modules).....	5
Asset Management Track (7 modules).....	6
Work Management Track (12 modules).....	7
MRO Supply Chain Track (5 modules) .....	10
Performance Management Track (5 modules).....	11

# PROGRAM OVERVIEW

## EAM eLearning Curriculum

SwainSmith's EAM eLearning curriculum is divided into five training tracks, each containing a number of focused course modules. Each module covers a specific area of Infor EAM functionality. Modules may be completed independently or as part of a longer track—whichever works best for you.

Together, the five tracks cover the entire EAM system, including core and advanced functionality. They also cover EAM best practices, industry conventions, and tips for maximizing the value of Infor EAM for your organization.

### Training Tracks

[Administration](#) (9 modules)

[Asset Management](#) (7 modules)

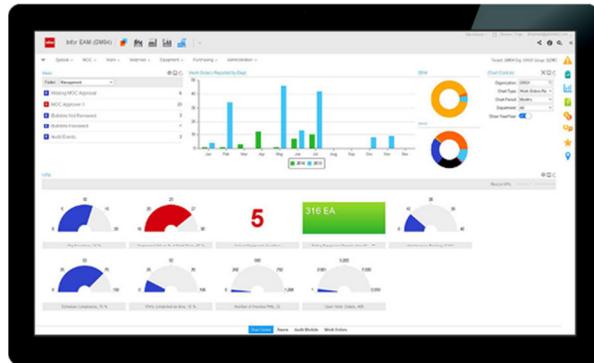
[Work Management](#) (12 modules)

[MRO Supply Chain](#) (5 modules)

[Performance Management](#) (5 modules)

## Empowering EAM Success

Our courses boost ROI on the Infor EAM system by helping you realize the software's untapped potential. Most EAM customers use less than 50% of the software's capabilities. Learn to use the EAM modules you already have—and find out how to implement new areas of EAM functionality.



## Certified EAM Professional Program

SwainSmith offers an EAM professional certificate through the EAM eLearning program. This formal recognition of achievement provides a way to boost your credentials and prove your EAM knowledge.

EAM eLearning participants who complete all 38 modules and successfully pass a final exam will receive a certificate with the title Certified EAM Professional. The certificate package includes a mailed hard copy, a digital copy in PDF format, and a digital seal that may be used on resumes and online profiles.

## What Makes EAM eLearning a World-Class Program?



### **Infor EAM certified instructors**

Our courses are taught by Infor EAM certified instructors with over 15 years of maintenance, storeroom, and procurement experience. They don't just teach you how to use the software: they teach you how to leverage its capabilities to improve your operation.



### **1:1 student-teacher ratio**

Each module is a one-on-one class with a certified EAM instructor. It's like a private coaching session for EAM. You're the only one in class, so you can ask questions, focus on the areas you're most interested in, and get individualized instruction from qualified EAM professionals.



### **Industry-accepted best practices**

Every module is founded on rock-solid best practices for asset management. Our instructors are Certified Maintenance and Reliability Professionals (CMRP), and every training track comes with best practice documentation, such as process flow maps and industry-accepted codes, that are yours to keep.



### **Live online classroom**

Courses are taught online by a live instructor using a live Infor EAM software environment. It's as good as being on site, except you don't have to pay travel costs. In addition, after each module, you will receive a digital recording of the session so you can go back and review whenever you want.

## Five Reasons to Choose EAM eLearning

### 1 Reduced Cost

Our program is significantly cheaper than on-site training because you don't have to pay consultant travel and lodging fees.

### 2 Convenience

No need to travel to a designated training location. Choose when and where to participate in training courses—whether at home or in the office.

### 3 Modular Design

Training content is provided in short, incremental modules, allowing you to learn what you need at your own pace.

### 4 Flexible Pricing

Training modules may be purchased individually, by track, or in customizable sets. Bulk discounts are available on purchases of multiple modules.

### 5 Full Coverage

Unlike other EAM training curricula, our eLearning program is designed to cover every area of Infor EAM functionality.

# COURSE OFFERINGS

## Administration Track (9 modules)

Take advantage of Infor EAM's flexibility by learning how to set up, customize, and manage your EAM system. The Administration Track will teach you how to configure the system, introduce you to Infor EAM's powerful tools for management, and give you an understanding of best practices for system design.

### **Asset Management Services**

Want to run maintenance as a business? Learn how to manage customer contracts, create invoices, and charge for time, materials, and labor costs. *(Note: This module is designed for maintenance organizations that operate as a business and charge clients for their work.)*

### **Audit Trails**

Make regulatory compliance easy by taking advantage of Infor EAM's comprehensive and flexible "audit trail" feature. Learn how to track changes to data, comments, and attributes for almost every table in the system.

### **Basic SQL**

Learn about the most commonly used EAM SQL statements, syntax, terms, and definitions.

### **Coding Structures**

Learn about industry-proven coding structures and naming conventions. See what best practice data sets look like. Discover the right kinds of codes to use for equipment classes and statuses, work order types and classes, equipment failures, technician delays, "how found" descriptions, and a variety of other information. *(Note: Each participant will receive a library of industry-accepted codes to take home.)*

### **Grid Development**

Learn how to build data grids. Discover how to easily compile, sort, view, and export data with joined tables.

### **Messenger Function**

Keep your personnel updated at all times by mastering Infor EAM's powerful messenger capabilities. Learn how to set up automatic e-mail notifications for predefined events, such as the submission of a requisition, completion of a work order, or receipt of a part.

### **Multi-Organization Support**

Learn how to use Infor EAM with a large, multi-site business. Discover how to manage multiple legal entities with one database, set up support for multiple currencies and languages, and apply security settings to determine user access across different regions or user groups.

### **System Configuration**

Learn how to set up users, user groups, menus, and dashboards. Discover best practices for system security and design. Learn how to make the system easy to use and easy to deploy.

### **Upload Utility**

Learn how to input large amounts of data into the system quickly, without the need for manual data entry, using Infor EAM's web-based upload utility.

## **Asset Management Track (7 modules)**

Control costs and extend asset life by learning how to manage your assets with Infor EAM. The Asset Management Track will teach you how to set up different types of assets in the EAM system, give you the skills to develop a structured equipment master, and get you started tracking costs, meters, claims, and other asset data.

### **Asset Hierarchy Management**

Make it easy for operators to create work requests and improve equipment costing. Learn how to track asset costs using a comprehensive, configured "family tree" that forms relationships between equipment, systems, and locations.

### **Asset Tracking**

Learn how to identify, track, locate, and analyze your physical assets. Maximize productivity and asset life by understanding how to compile and access asset

data (such as location, work history, warranties, claims, meters, permits, and bills of materials).

### **Equipment Configuration**

Speed up equipment database development efforts. Learn how to generate multiple equipment entries quickly and accurately using predefined templates for each type of equipment. Automate the process of creating entries for assets, positions, systems, and associated parts, meters, applicable warranties, and child equipment.

### **Linear Assets**

Learn how to set up and manage linear assets using reference details such as length, units of measure, and geographic coordinates. Learn how to write work orders against any point on or section of an asset by specifying to and from points.

### **Metering Function**

Learn how to associate meters with equipment. Discover how to set up the system so that metered usage values automatically flow down to selected asset components according to a user-defined hierarchy.

### **Repairable Spares**

Improve tracking of repairable spares by learning how to designate parts or equipment as “repairable.” Find out how to set up the system so that items designated for refurbishment are automatically placed in a “to be repaired” location when they are returned to the storeroom after a job.

### **Warranties & Warranty Claims**

Get your money back—and avoid invalidating your warranty—by using Infor EAM to track asset warranties and claims. Learn how to set up warranties in the system, automatically identify assets under warranty, and track all work orders having a potential claim.

## **Work Management Track (12 modules)**

Take charge of your maintenance operation by learning how to manage work with Infor EAM. The Work Management Track will teach you how to use the EAM system to

identify and control work, manage safety and inspections, plan and schedule more efficiently, implement preventive maintenance, and more.

### **Budget Management**

Control spend by learning how to set up budgets and use them to automatically capture, monitor, control, and analyze maintenance costs.

### **Call Center**

Learn how to manage incoming maintenance requests from a broad and diverse customer base. Empower your customer service representatives by putting all the information needed to handle maintenance requests at their fingertips.

### **Checklists**

Formalize inspections by learning how to break down task instructions into individual steps so that each step can be confirmed separately. Find out how to create checklists for any task on a work order or lockout/tagout (LOTO) procedure, and learn how to create follow-up work orders automatically for all flagged checklist items.

### **Inspection Management**

Start down the path of predictive maintenance by learning how set up inspection requirements, review condition information, and approve results. Discover how to automatically generate corrective work orders when an inspection result exceeds a preset limit.

### **Job Planning**

Improve maintenance planning by learning how to build a library of pre-planned jobs. Discover how to reduce maintenance planning time and mean time to repair (MTTR) through the use of standard work orders.

### **Microsoft Project Interface**

Improve scheduling and technician utilization by learning how to build a two-way interface between Infor EAM and Microsoft Project. This module will teach you how to automatically send work orders and personnel data to Project (for planning and scheduling purposes) and receive scheduling data from Project (for execution and tracking).

### **Preventive Maintenance**

Reduce reactive maintenance by taking advantage of Infor EAM's powerful PM features. Learn how to set up PM tasks based on a fixed date, flexible time period, or metered usage; how to incorporate routes with a task so that technicians can service multiple assets under a single work order; how to compensate for early or late work completion with automatic adjustments to PM schedules; and how to use maintenance patterns to handle nested PM work orders.

### **Project Management**

Learn how to track complex or simple projects from start to finish. Reduce the resources you spend on projects and improve capital planning by learning better ways to manage budgets, labor, and equipment.

### **Safety Management**

Improve safety by learning how to set up procedures for identifying and alleviating hazards. Then, learn how to allocate safety-related responsibilities to specific individuals to ensure that the correct actions are taken. Discover how Infor EAM can facilitate permitting and LOTO (lockout/tagout) procedures.

### **System Navigation**

Learn how to get around in the system. Speed up access to information by learning the best ways to navigate forms, search for records, and sort and filter data.

### **Work Identification & Control**

Learn how to manage all work performed on assets, from installing new equipment to issuing and completing maintenance work orders. Make the most of your resources by learning how to identify and control work management activities.

### **Work Scheduling**

Learn how to build and manage weekly and daily maintenance schedules. Discover how to improve maintenance labor utilization by managing who does the work and when they do it.

## MRO Supply Chain Track (5 modules)

Reduce MRO costs by learning how to manage inventory and procurement with Infor EAM. The MRO Supply Chain Track will teach you how to track spare parts and storeroom transactions, give you the skills to optimize stock levels and improve delivery times, and show you how to control the purchasing process using the EAM system.

### **Invoice Management**

Control spend and help ensure company payments are in order by learning how to create invoices and match them with POs and receipts. Find out how the req-to-check process works in Infor EAM. Discover ways to reduce unnecessary purchases and costs using procurement controls.

### **Materials Management**

Learn how to track storeroom receipts, issues, and returns. Reduce MRO costs by managing storeroom inventory with tools such as economic order quantity (EOQ), class calculations and assignments, and cycle counts. Discover how to improve material fill rates and reduce mean time to repair while lowering inventory costs.

### **MRO Materials Tracking**

Learn how to identify, name, classify, track, locate, and analyze your MRO materials. Maximize productivity and asset life by understanding how to develop a complete, accurate, and timely MRO materials master.

### **Purchasing Management**

Learn how to order parts, keep up with delivery times, and manage vendors. Discover the best ways to roll out requisition, routing, approval, and PO generation. Find out how to set up and manage contracts on materials with set pricing and terms. Learn how to reduce unnecessary purchases and costs using procurement controls.

### **Vendor Tracking**

Learn how to identify, name, classify, track, locate, and analyze your MRO vendors. Better understand who you buy from. Improve vendor performance and drive procurement costs by learning how to develop a complete, accurate, and timely MRO vendor master.

## Performance Management Track (5 modules)

Keep your business on track by learning how to monitor performance with Infor EAM. The Performance Management Track will show you how to take advantage of the EAM system's powerful reporting tools, introduce you to some key performance indicators, and teach you how to access data quickly using charts and inboxes.

### **Charts**

A picture speaks a thousand words. Learn how to set up charts to graphically display and trend performance measurements over time. Learn how to turn your EAM Start Center into an EAM Performance Dashboard.

### **Inboxes**

Access key data faster with EAM Start Center inboxes. Learn how to develop data filters to quickly pull the information you want to keep an eye on. Learn the basic SQL statements that simplify and speed system use and data access.

### **KPIs**

Monitor performance more closely by learning how to set up KPIs. Find out how to use graphic icons to measure KPIs without having to generate a report. Discover best practices for several of the most common and useful KPIs, including PM compliance and mean time between failures (MTBF).

### **Reports**

Get your hands on the information you need to drive your business. Learn how to use Infor EAM's many predefined reports for assets, materials, purchasing, schedules, work, budget analysis, projects, and commercial services.

### **Advanced Reports**

One size does not fit all. Learn how to use Infor EAM's Advanced Reporting module to create customized reports. Discover the basics of Cognos Workspace Advanced and Report Studio.

## About SwainSmith

SwainSmith, Inc., has been providing Infor EAM software solutions since 1997. As an official Infor EAM Channel Partner, SwainSmith helps companies solve their asset management challenges through a combination of Infor EAM solutions and industry-accepted best practices. To learn more about SwainSmith, please visit [SwainSmith.com](http://SwainSmith.com).

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