

# ASSETWORLD:21

## MISSION / POSSIBLE

## A DAPT / EXCEED

April 19<sup>th</sup> - 22<sup>nd</sup>

### PRE-CONFERENCE TRAINING SCHEDULE:

Friday, April 9th: Pre-Conference Orientation

| Start (Central) | End (Central) | Session / Activity         | Platform  |
|-----------------|---------------|----------------------------|-----------|
| 12:00 PM        | 1:00 PM       | Pre-Conference Orientation | Attendify |

Monday, April 12th - Thursday, April 15th: Pre-Conference Training

| Start (Central) | End (Central) | Session / Activity  | Platform        |
|-----------------|---------------|---|-----------------|
| 12:00 PM        | 1:15 PM       | <b>Training Courses (choose one)</b> <ul style="list-style-type: none"> <li>• “Foundation / Beginner” Training</li> <li>• “Work Lifecycle / Intermediate” Training</li> <li>• “Advanced Business Automation” Certification</li> <li>• “ReADY Request” Certification</li> </ul> <b>Lecture (All together by class)</b> | Attendify       |
| 1:15 PM         | 2:00 PM       | <b>Training Workshops</b><br>(Breakout in Groups of 5-10)   | Microsoft Teams |
| 2:00 PM         | 2:15 PM       | Break   |                 |
| 2:15 PM         | 3:30 PM       | <b>Key Concepts</b>   | Attendify       |
| 3:30 PM         | 4:00 PM       | <b>Training Workshops (Cont’d)</b>  | Microsoft Teams |
| 4:00 PM         | 5:00 PM       | <b>Networking (Tues. &amp; Thurs. Only)</b>   | Wonder          |

*\*This schedule is preliminary and subject to change. (3/4/21)*

# Course: “Foundation / Beginner Training” - Pg. 1 of 3

**Course Description:**

A focus on our solutions and how you can leverage them to make your organization as successful as possible. Our true foundations course filled with the items you need to know to effectively set a vision and begin to use ReADY, AiM, and Go.

**Designed For:**

Any employee, manager, or leader who wants to learn the essential elements at the heart of our solutions.

| Topic Name  | Learning Outcomes  | Products/ Features   |
|---|--|--|
| <p><b>Periodic Table of AssetWorks</b></p>            | <p><b>Reviews the fundamentals of each product family, including navigation, controls, WorkDesks, queries &amp; more.</b></p> <ul style="list-style-type: none"> <li>• Understand how the product families support and work with each other.</li> <li>• Learn about screen controls, options, and viewers within each.</li> <li>• Practice running basic and advanced queries, and data exports.</li> <li>• Learn how to set up an AiM WorkDesk.</li> <li>• Learn about AiM content management.</li> </ul>   | <ul style="list-style-type: none"> <li>• AiM</li> <li>• ReADY</li> <li>• Go</li> </ul>   |
| <p><b>Key Concepts</b></p>                            | <p><b>Reviews, explains, and offers best practices when setting up the essential hierarchies within AiM including Location, Organization, Project/Work Order/Phase, Work Classification, and Capital Project Type.</b></p> <ul style="list-style-type: none"> <li>• Understand the key hierarchies leveraged within each solution.</li> <li>• Understand the key personas using each solution.</li> </ul>  | <ul style="list-style-type: none"> <li>• AiM</li> <li>• Go</li> <li>• ReADY</li> </ul>   |
| <p><b>How important are Assets?</b></p>               | <p><b>We will provide you with the educational content on everything asset, why you should have an Asset Czar and provide some examples from the original asset workshop.</b></p> <ul style="list-style-type: none"> <li>• Understand what an Asset is to AssetWorks</li> <li>• Understand the types of Assets and the types of Asset Profile Screens</li> <li>• Understand the importance of tracking the maintenance and condition of assets.</li> </ul>   | <ul style="list-style-type: none"> <li>• Master Asset Profile</li> <li>• Work Order / Phase</li> <li>• Assessment and Needs Analysis</li> <li>• Go Asset Management</li> </ul> |
| <p><b>How to administer your Asset inventory?</b></p> | <p><b>Reviews the solutions available to administer your Asset Inventory including Go AM, AssetSync, and AiM.</b></p> <ul style="list-style-type: none"> <li>• The learner will be able to configure Asset Basics in AiM.</li> <li>• The learner will have a basic understanding of the use of Go Asset Management and how it is used to add and update their Asset Inventory.</li> <li>• The learner will have completed a basic Asset.</li> <li>• Given a properly constructed AssetSync data sheet, the learner should be familiar with using AssetSync to import data into AiM.</li> </ul> | <ul style="list-style-type: none"> <li>• Master Asset Profile / Asset Group / Asset Basics (AiM)</li> <li>• Go Asset Management (Go AM)</li> <li>• AssetSync</li> </ul>        |

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# Course: “Foundation / Beginner Training” - Pg. 2 of 3

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| Topic Name                                    | Learning Outcomes   | Products/ Features  |
|---|---|---|
| <p><b>Why location data is important?</b></p> | <p><b>Where is a powerful data point? Where is this asset located? Where are my resources being allocated? Where SHOULD they be allocated? Let's discuss the importance of a strong Real Estate and Property implementation and how it feeds so many of the other goals you want to accomplish.</b></p> <ul style="list-style-type: none"> <li>• Understand where location information is used.</li> <li>• Learn about space management, indirect cost recovery, and the features found within AiM used to support this.</li> <li>• Become familiar with the Space Viewer and ReADY Space.</li> </ul> | <ul style="list-style-type: none"> <li>• Region/Facility/ Property/Location</li> <li>• AiMCAD</li> <li>• Space Management</li> <li>• ReADY Space</li> </ul> |
| <p><b>How to request work?</b></p>            | <p><b>This class focuses on how to request work from our different products (ReADY Request, AiM Customer Request, and Go Follow-up Work) and the associated personas involved. Default configuration and codes (Problem Codes, Assignment Defaults, Zone defaults, Work Codes) will also be discussed.</b></p> <ul style="list-style-type: none"> <li>• Familiarize the user with ReADY Request search/submit/approve.</li> <li>• Familiarize the user with AiM CR and CR Approve.</li> <li>• Discuss Go Follow-Up Work.</li> </ul>   | <ul style="list-style-type: none"> <li>• ReADY Request</li> <li>• AiM Customer Request</li> <li>• Go Follow-Up Work</li> </ul>                              |
| <p><b>How to create work orders?</b></p>      | <p><b>This class introduces the core concepts required to create a work request. Work Orders, Phases, Shops, Problem Codes, Work Codes, Priority, Status.</b></p> <ul style="list-style-type: none"> <li>• Understand the Work Order/Phase screen and the concepts required to create a Work Order.</li> <li>• Discuss quick work orders, default values, and ready request.</li> </ul>   | <ul style="list-style-type: none"> <li>• AiM Work Management</li> <li>• Property Defaults, Zone Defaults, Problem Codes</li> <li>• ReADY Request</li> </ul> |
| <p><b>What is a Work Code?</b></p>            | <p><b>What is a work code and why is it so important to AssetWorks? Let's discuss this essential classification feature and the functionality which can be unlocked if used properly.</b></p> <ul style="list-style-type: none"> <li>• Understand the design intent behind Work Codes.</li> <li>• Understand the different features which a work code can affect.</li> <li>• Discuss Quick Start Work Codes.</li> </ul>   | <ul style="list-style-type: none"> <li>• AiM Work Management</li> <li>• AiM Preventive Maintenance</li> <li>• Go WM</li> </ul>                              |

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# Course: “Foundation / Beginner Training” - Pg. 3 of 3

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| Topic Name                           | Learning Outcomes  | Products/Features  |
|--------------------------------------|--|--|
| How to administer PM?                | <p><b>Reviews the primary features involved with executing Preventive Maintenance. Learn how to schedule and execute through PM standards and Templates.</b></p> <ul style="list-style-type: none"> <li>• Discuss the difference between preventive and corrective maintenance</li> <li>• Learner will understand the different strategic pieces of Preventive Maintenance and why these are important.</li> <li>• Discuss the different frequency and generation types.</li> <li>• Learn how to generate PM WOs using the PM Generator screen.</li> </ul> | <ul style="list-style-type: none"> <li>• PM Standards, Checkpoints, and Meters</li> <li>• PM Template</li> <li>• PM Generator</li> <li>• PM WOs</li> </ul>   |
| Execution of Work                    | <p><b>Reviews the many ways we can execute on AiM work orders. Both AiM and Go examples will be highlighted.</b></p> <ul style="list-style-type: none"> <li>• Review with learners the different ways work can be executed and tracked using both AiM and Go WM.</li> </ul>  | <ul style="list-style-type: none"> <li>• Daily Assignments</li> <li>• Go WM</li> </ul>   |
| How to request material or services? | <p><b>Learn the different ways materials and/or services may be requested from the inventory management/purchasing department.</b></p> <ul style="list-style-type: none"> <li>• Review the different ways materials may be requested.</li> <li>• Understand the primary functions of Go Inventory vs. Receiving vs. Purchasing.</li> </ul>   | <ul style="list-style-type: none"> <li>• AiM Purchase Request</li> <li>• AiM Purchase Generator</li> <li>• AiM Purchase/Receive/Disbursement/Invoice</li> <li>• Go Inventory</li> <li>• Go Purchasing</li> <li>• Go Receiving</li> </ul> |
| Communicating with the Customer      | <p><b>Leveraging the numerous ways you can communicate your customers can only improve customer satisfaction. Let's have a discussion regarding some of the opportunities you may not be taking full advantage of yet.</b></p> <ul style="list-style-type: none"> <li>• Review with learners key concepts/features within AiM, ReADY, and Go which improve customer understanding of the progress of their work.</li> </ul>  | <ul style="list-style-type: none"> <li>• Comment Stream</li> <li>• Notes Log</li> <li>• Status Notification Templates</li> <li>• Workflow Notification Templates</li> <li>• Surveys</li> </ul>   |

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