

Maximo Application Suite - Manage: Core Data Setup

Duration: 2 Days **Course Code: MAX4326G** **Delivery Method: Virtual Learning**

Overview:

This 1-day instructor led course provides students with an understanding of how to create a new Organization and Site in Maximo Manage and discuss the core options available in the Organizations application. They will also be able to create classifications and Location records. Students will learn about topics such as Multi-Organization strategy, GL Account setup and Organization Options. This course also has hands-on lab exercises using a Red Hat OpenShift Maximo Manage environment.

Virtual Learning

This interactive training can be taken from any location, your office or home and is delivered by a trainer. This training does not have any delegates in the class with the instructor, since all delegates are virtually connected. Virtual delegates do not travel to this course, Global Knowledge will send you all the information needed before the start of the course and you can test the logins.

Target Audience:

Consultants, System Administrators, Support, Sales, and Users

Objectives:

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| ■ After completing this course, you should be able to: | ■ Configure basic Organization Chart of Account settings |
| ■ Describe Multi-Org and Multi-Site strategy | ■ Create a Clearing account |
| ■ Plan new Organization and Site records | ■ Create Classification hierarchies |
| ■ Create Item and Company Sets | ■ Understand the usage of Locations |
| ■ Explain the usage of Organization options | ■ Create Location Systems |

Content:

Module 1: Core Data Setup Introduction

- Discuss the Initial data configuration
- Secondary Data Steps
- Overview of Users, People and Labor
- Define basic required data

Module 2: Initial Setup of a Manage System

- Terms and Conditions
- Database Setup
- Secondary Data and Database Setup

Module 3: Configure Organizations and Sites

- Maximo Data Levels
- Maximo Sets
- Maximo Multi Organization Configuration
- Maximo Multi Site Configuration

Module 4: Using Sets for Data Sharing

- Describe Maximo Data Sharing
- Describe Data sharing in a Multi-Organization environment
- Describe Organizations Currencies
- Describe Company and Item Sets

Module 5: GL Account Setup

- Describe Maximo GL Account Configuration
- Describe GL Account Components
- Describe Chart of Accounts for Maximo Organizations

Demonstration: Creating Organizations and Sites

Student Exercises: Lab 1 Creating an Organization

Module 6: Financial Accounts Overview

- Describe Maximo Financial Accounts Overview
- Describe Financial Periods
- Describe Organization Default Accounts
- Describe Resource Codes
- Describe Various Financial Account Settings

Module 7: Organization Options

- Describe Maximo Organization Options
- Describe Maximo Site Level Options
- Describe Maximo Work Order Options
- Describe Maximo Purchase Order Options

Module 8: Defining Classifications

- Describe Maximo Classifications Overview
- Describe Maximo Classification Use Case
- Describe Maximo Classification Setup
- Describe Maximo Classification Attributes

Demonstration: Creating Classifications

Student Exercises: Labs 2 Create Classifications

Module 9: Locations and Location Hierarchies

- Describe Maximo Location Definitions
- Describe Maximo Location
- Describe Maximo Systems
- Describe Maximo Location Setup

Demonstration: Creating Locations, Systems and Location Hierarchies

Student Exercises: Lab 3 - Creating Locations, Systems and Location Hierarchies

Additional Information:

Official course book provided to participants

Further Information:

For More information, or to book your course, please call us on Head Office 01189 123456 / Northern Office 0113 242 5931

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