Basic Tutorials
Session 1 – Set it Up! (time: 5 minutes)

Assumptions

1. Your organization has only one "Plant" (= premises) where most or all of the assets you maintain are located. This can be each factory your company has, each restaurant you maintain or each building whose equipment you service.

2. Your organization has only one maintenance unit or department responsible for receiving and processing all maintenance job requests.

Notes

1. If you have more than one plant then replicate the steps described on the "Configure your Plant" section below.

2. Your default installation comes with a default plant (called "Plant 1") and a default maintenance department (called "MTC").

3. We will only edit the plant information and leave the department as is. You can edit the department information at a later stage.

Proceed as Follows

- **Configure your Profile:** go to "Logged in as …" → "My Profile" on the top right of the screen. Select the "User Profile" tab on the "User Settings" page and set the information there.

- **Configure your Plant:** go to "Logged in as …" → "Modules" and select the "Organization/ Plant/ Department" link. Select "Plant 1" from the drop down menu and let the information load.

  - Change the information under the "General Settings" section and click "Save". The page will reload.

  - Select the plant you edited and change the "Plant Currency" if needed. Click "Save" at the bottom of the "Financial Settings" section (do not set the labor rates at this moment.) The page will reload.

- **Invite your Users:** go to "Logged in as…" → "Modules" and select the "Users" link.

  - If you are just starting out with the professional version, you will have user quota available. If you are not using the professional

version, skip the next steps.

- Enter the new user email address and leave all other options as they are. Click "Invite".

- These new users will receive an email with registration instructions to join your organization's account.

Status after Session 1

You have setup the organizational structure of your company.

Coming Next

Setup your asset structure.
 Unique solution ID: #1001
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