



## September 18-20, 2017 - Seattle, WA

Checkpoint is Maintenance Connection’s annual training seminar. With 2 days of class-based training coupled with great after hours VIP events and MC swag give aways, it’s one of the most unique and interactive ways to increase your Maintenance Connection skills!

Our goal for Checkpoint is that we enhance your current skills, explain new features and tools, and provide useful instruction on how to improve your efficiency and enhance your use of Maintenance Connection on a daily basis.

On the next page you’ll find a “pocket guide” of the agenda listed by track. Please refer to it when selecting sessions on our registration page - [checkpoint.maintenanceconnection.com](http://checkpoint.maintenanceconnection.com)

### Schedule Overview

**Monday, September 18** - please join us for a welcome reception from 5:00 - 8:00 PM at the Frolik Rooftop Bar at the Motif Hotel. Pre-register and grab some yummy drinks and appetizers.

#### TUESDAY, SEPT. 19

8:00 AM Breakfast  
 8:30 AM General Session  
 9:45 AM Break  
 10:15 AM Session 1  
 11:15 AM Break  
 11:30 AM Session 2  
 12:30 PM Lunch  
 1:45 PM Session 3  
 2:45 PM Break  
 3:00 PM Session 4  
 5:00 PM Customer Appreciation Event

#### WEDNESDAY, SEPT. 20

8:00 AM Industry Breakfast  
 9:00 AM Session 5  
 10:00 AM Break  
 10:15 AM Session 6  
 11:15 AM Break  
 11:30 AM Session 7  
 12:30 PM Lunch  
 1:45 PM Session 8  
 2:45 PM Break  
 3:00 PM Session 9  
 4:00 PM Sessions Conclude



**Registration Fees:**  
**Early: \$1350/pp**  
**Regular: \$1450/pp**  
**Groups: \$1250/pp**

[CLICK HERE TO REGISTER TODAY](#)

### Travel Information

**Motif Hotel**  
 1415 5th Ave  
 Seattle, WA 98101  
 Group Hotel Rate: \$219  
[Book Online](#) or Call  
 (855) 515-1144

### Airport Information

SEA- SeaTac  
 Approx. 30 min drive

### Transportation

Taxi: \$45.00  
 uberX: \$34-44  
 uberXL: \$50-66  
 UberSUV: \$65  
 SpeediShuttle -\$15.99

### Laptops:

Each attendee should have access to a laptop. Laptops are available to rent, but must be reserved in advance and will cost \$250 for the entire event.

### Onsite Support

The majority of our support team will be present at the event in order to help answer questions about the new techniques that you will be learning. Stop by anytime to refine your new skills

Track	Best Practices	Work Orders and Parts	Reporting	Assets & System Management	PMs, Procedures, and Projects
Recommended MC User Roles	Super Users	Beginner / Technician	Manager / Data Analyst	System Administrator	Planner / Scheduler
<b>General Session - Tues. 8:30-10:00</b>	<b>General Session / Keynote</b>				
<b>Session 1 – Tues. 10:15-11:15</b>	<b>BP01</b> Overview of Reporting Best Practices	<b>MC01</b> Maintenance Connection 101	<b>R01</b> Basics of Reporting: Overview Part 1	<b>MC v8.0</b> Overview of New Release and Updates	<b>PPP01</b> Overview of Preventive Maintenance
<b>Session 2 – Tues. 11:30-12: 30</b>	<b>BP01-W</b> Workshop for Reporting: Build 5 Must Have Reports and KPIs	<b>W01</b> Basics of Work Order Management	<b>R02</b> Basics of Reporting: Overview Part 2	<b>A03</b> Managing Assets Using Classifications	<b>PPP02</b> Overview of PM Procedures
<b>Lunch – Tues. 12:30-1:30</b>	<b>Lunch</b>				
<b>Session 3 – Tues. 1:45 - 2:45</b>	<b>BP01-W</b> Workshop for Reporting: Build 5 Must Have Reports and KPIs	<b>W02</b> Overview of Work Order Creation	<b>R03</b> Basics of Reporting: Report Setup Part 1	<b>A04</b> Asset Best Practices and Configuration Tools	<b>PPP02-W</b> Workshop for PM Procedures
<b>Session 4 – Tues. 3:00 - 4:00</b>	<b>BP02</b> SQL Scripting Best Practices	<b>W02-W</b> Workshop for Creating Work Orders and Assignments	<b>R04</b> Basics of Reporting: Report Setup Part 2	<b>A06</b> Overview of Asset Specifications	<b>PPP04</b> Setting Up Assets and PM Schedules
<b>Session 5 – Wed. 9:00 - 10:00</b>	<b>BP03</b> Overview of Preventive Maintenance Best Practices	<b>P05</b> Purchase Order Creation and Approval	<b>R05</b> Intermediate Reporting Report Configuration	<b>MC v8.0</b> Overview of New Release and Updates	<b>PPP05</b> Creating PM Schedules
<b>Session 6 – Wed. 10:15 - 11:15</b>	<b>BP03-W</b> Workshop for Preventive Maintenance: Learn 5 Best Practices for PMs	<b>EX03</b> Work Order Management Through MC Express	<b>R07</b> Intermediate Reporting Smart Reports	<b>SA04</b> Managing KPIs and Dashboards	<b>PPP05-W</b> Workshop for PM Schedules and Attaching Assets
<b>Session 7 – Wed. 11:30 - 12:30</b>	<b>BP04</b> Overview of Work Order Management Best Practices	<b>P02</b> Managing Parts Using Stockrooms	<b>R09</b> Advanced Reporting Custom Expressions and Criteria	<b>W09</b> Work Order Management Tools	<b>PPP06</b> PM Generation and WO Projections
<b>Lunch – Wed. 12:30-1:30</b>	<b>Lunch</b>				
<b>Session 8 – Wed. 1:45 - 2:45</b>	<b>BP05</b> Overview of Process Automation Best Practices	<b>W07</b> Tracking Time and Costs on Work Orders	<b>R10</b> Advanced Reporting: Report Setup and Summary Reports	<b>P01</b> Master Parts List Configuration	<b>PPP07</b> Projects and Project Plans
<b>Session 9 – Wed. 3:00 - 4: 00</b>	<b>BP05-W</b> Workshop for Automation Best Practices	<b>EX04</b> Parts Management Through MC Express	<b>R11</b> Advanced Reporting: Pivot Reports	<b>SA07</b> Rules Manager: Events and Notifications	<b>PPP08</b> PM Optimization and Efficiency

**Checkpoint Course Format:** We offer courses split into “track groups” or categories. Many of the courses are intended to be sequential and build upon each other, but do not necessarily have to be taken in order. You may choose from courses among different tracks to build your Checkpoint schedule.

## Best Practices Track – Sessions for Maintenance Connection “Super Users”

### **Session 1 - BP01 - Overview of Reporting Best Practices**

Learn about five reporting best practices. This course will instruct you on creating days past due reports, projection reports, smart reports, summary reports and pivot reports.

### **Session 2 - BP01-W - Workshop for Reporting: Build 5 Must Have Reports and KPIs**

Walk step-by-step through this hands-on workshop to help you build three to five “must have” advanced reports using summaries, joins and where statements, custom expressions and other advanced features as well as providing takeaways that will assist you back in the workplace.

### **Session 3 - BP01-W - Workshop for Reporting: Build 5 Must Have Reports and KPIs (REPEATED)**

Walk step-by-step through this hands-on workshop to help you build three to five “must have” advanced reports such as summaries, joins and where statements, custom expressions and more as well as providing takeaways to assist you.

### **Session 4 - BP02 - SQL Scripting Best Practices**

Learn the best practices of using SQL within Maintenance Connection. This course will instruct you on the best methods and areas to use SQL statements within MC. You will receive instruction on using SQL in Rules Manager, KPIs, Reports, the Database Job Scheduler and examples of common SQL statements to use in MC.

### **Session 5 - BP03 - Overview of Preventive Maintenance Best Practices**

Featuring best practices for PMs, this course teaches how to use Attachments, create a multiple Asset PM with Multiple Procedures, create a PM with follow-up PMs, create a Project Phase PM and how to best manage PM schedules.

### **Session 6 - BP03-W - Workshop for Preventive Maintenance: Learn 5 Best Practices for PMs**

This course is a step-by-step hands-on workshop to help you build three to five “must have” advanced PM schedules which include PMs with attachments, complex Procedures, multiple Assets and Project Plans as well as providing takeaways to assist you.

### **Session 7 - BP04 - Overview of Work Order Management Best Practices**

Receive in-depth instruction on the best practices related to 5 keys areas of Work Order management including workflow for new Work Orders, using Parts and Estimates, routing using Shops and Shifts, Complete/Close preferences, and schedule planning.

### **Session 8 BP05 - Overview of Process Automation Best Practices**

Learn seven hands on examples of the best practices of automation in MC. This course will instruct you on how to use the Rules Manager to automate assignments and send out notifications. It also will teach you how to automate reports through email, auto populate Labor costs, Automate PMs, send notification about part quantities, and use Smart Reports for updates.

### **Session 7 - BP05-W - Workshop for Automation Best Practices**

Hands-on best practices examples for automation in MC. Step-by-step instructions inform you on how to use the Rules Manager to automate assignments and send out notifications. It also will teach you how to automate reports through email, auto populate Labor costs, Automate PMs and use Smart Reports to quickly update information.

## Work Orders and Parts Track – Sessions for Maintenance Connection Beginners & Technicians

### **Session 1 - MC01 - Maintenance Connection 101**

Learn the foundation and the fundamentals of Maintenance Connection with this course that covers the basics of the system. Get an overview of basic system usage including navigation, system layout, applications and modules.

### **Session 2 - W01 - Basics of Work Order Management**

Learn the basics of work orders including the different work order types and the key components that make up a work order including basic and detailed information, and status changes, tasks, labor resources, parts, and tools.

### **Session 3 - W02 - Overview of Work Order Creation**

Explore the various ways to create or quickly generate work orders and send them into the field.

### **Session 4 - W02-W - Workshop for Creating Work Orders and Assignment**

Hands-on step-by-step instructions will guide you through work order creation in both the administrative and end user interfaces, how to assign labor to a work order, and entering numerous work orders using the Work Order Rapid Entry tool.

### **Session 5 - P05 - Purchase Order Creation and Approval**

This session covers best practices for purchase order creation including manual and auto-generated options.

### **Session 6 - EX03 - Work Order Management Through MC Express**

This course will teach you how to create and edit Work Order records in MC express, navigate the Work Order lists and filtering options, the different Work Order pages, as well as unique Work Order features.

### **Session 7- P02 - Managing Parts Using Stockrooms**

Learn how to create simple procedures when generating preventive maintenance records. This session explores the basic tabs within the record.

### **Session 8 - W07 - Tracking Time and Costs on Work Orders**

Learn how to incorporate labor and materials into work orders including estimates and actuals, tools, and other costs and Tools.

### **Session 9 - EX04 - Parts Management Through MC Express**

This course will cover how to create and edit Part records in MC Express, navigate the Part lists and filtering options, the different Part pages, as well as unique Part features.

## Reporting Track - Sessions for Maintenance Connection Managers /Data Analysts

### **Session 1 - R01 - Basics of Reporting: Overview Part 1**

This session will discuss the different types of reports available, the basic building blocks of a report, and where reports are located within the system.

### **Session 2 - R02 - Basics of Reporting: Overview Part 2**

Learn different methods for running reports and best practices for defining report criteria to receive desired results

### **Session 3 - R03 - Basics of Reporting: Report Setup Part 1**

This session will cover two steps in report setup: selecting the proper field list and sorting and grouping your results.

### **Session 4 - R04 - Basics of Reporting: Report Setup Part 2**

Learn the basics of chart creation and see tips and tricks available for reporting that you may not know.

### **Session 5 - R05 - Intermediate Reporting Report Configuration**

This intermediate reporting session will discuss best practices for configuring reports including data relationships and report criteria.

### **Session 6 - R07 - Intermediate Reporting Smart Reports**

Smart Reports are an extremely powerful feature of Maintenance Connection. Learn how to use smart reports with smart actions and criteria to create very efficient business processes.

### **Session 7 - R09 - Advanced Reporting Custom Expressions and Criteria**

Gain hands on experience running advanced reports with commonly used custom expressions, and see how fixed criteria can be used to place limitations on reports.

### **Session 8 - R10 - Advanced Reporting: Report Setup and Summary Reports**

This session will highlight two advanced reporting options: smart actions and custom group headers. Gain advanced reporting knowledge of Summary Reports which can be used to display aggregations of data such as sums, averages, and counts

### **Session 9 - R11 - Advanced Reporting: Pivot Reports**

This session will show why pivot reports are effective when you need to show data using two dimensions. Learn how to properly configure pivot reports and define fields to include the correct type of data is output.



## Assets & System Management Track - Sessions for Maintenance Connection System Administrators

### **Session 1 - MC v8.0 - Overview of New Release and Updates**

This course covers new features and enhancements, teaching how to best leverage the extensive new v8.0 features including Global Search, Assignment Time Tracking, setting the Next Schedule PM Date, Enhanced Barcode Support, Labor Change Manager, Rules Manager Escalation, Dynamic Report Criteria, and more!

### **Session 2 - A03 - Managing Assets Using Classifications**

Review best practices for asset classifications including hierarchies and creation methods, and review simple update processes.

### **Session 3 - A04 - Asset Best Practices and Configuration Tools**

Learn the basics for various copy and paste methods, review the four asset configuration tools in MC, and see the benefits of asset preferences.

### **Session 4 - A06 - Overview of Asset Specifications**

Explore the various ways to create asset specifications. Learn how to standardize and track all types of asset data including work order/asset relationships and reporting.

### **Session 5 - MC v8.0 - Overview of New Release and Updates**

This course covers new features and enhancements, teaching how to best leverage the extensive new v8.0 features including Global Search, Assignment Time Tracking, setting the Next Schedule PM Date, Enhanced Barcode Support, Labor Change Manager, Rules Manager Escalation, Dynamic Report Criteria, and more!

### **Session 6 - SA04 - Managing KPIs and Dashboards**

Explore Dashboard functionality and learn about more advanced features of key performance indicators like sharing and cloning.

### **Session 7 - W09 - Work Order Management Tools**

Learn how to make the most of work order management tools with this in depth look at the actions available to interact with work orders such as controls/filters, labor calendars, and status history. The Work Order Explorer and Work Order Matrix will also be discussed.

### **Session 8 - P01 - Master Parts List Configuration**

Learn best practices for configuring the Inventory Module including categories, naming conventions, vendors, and cost rules.

### **Session 9 - SA07 - Rules Manager: Events and Notifications**

Gain insights into the Rules Manager from a system administrator's perspective. Learn about database-level audit procedures and how to configure various complex automation rules.

## PMs, Procedures, and Projects Track - Sessions for Maintenance Connection Planners/ Schedulers

### **Session 1 - PPP01 - Overview of Preventive Maintenance**

This session provides a basic overview of preventive maintenance by exploring the effects different tabs have on records and looking at general PM preferences.

### **Session 2 - PPP02 - Overview of PM Procedures**

Learn how to create simple Procedures when generating preventive maintenance records. This session explores the basic tabs within the record.

### **Session 3 - PPP02-W - Workshop for PM Procedures**

Walk step-by-step through this hands-on workshop that gives you firsthand experience with procedures by linking assets using procedures, adding procedures directly to a work order, using them in preventive maintenance schedules, auto-assigning procedures based on problem codes, and using procedures in project planning.

### **Session 4 - PPP04 - Setting Up Assets and PM Schedules**

This session takes a look at how the assets tab functions and the fields and columns that can be selected when adding assets to a schedule.

### **Session 5 - PPP05 - Creating PM Schedules**

Learn how to create preventive maintenance schedules and see examples of PMs with different procedure intervals, linking procedure tasks, and automation.

### **Session 6 - PPP05-W - Workshop for PM Schedules and Attaching Assets**

Get deeper hands-on experience as you follow step-by-step instructions to learn the nuances of creating PMs with different procedure intervals, linking procedure tasks, and automation, as well as how to add and manage assets that are associated to a PM schedule.

### **Session 7 - PPP06 -PM Generation and WO Projections**

See an overview of the differences between automatic and manual generation of preventive maintenance schedules, and preview the Work Order Projections feature.

### **Session 8- PPP07 - Projects and Project Plans**

This session discusses the ways that projects and project plans can be utilized and provides an example of how to generate a project plan.

### **Session 9 - PPP08 - PM Optimization and Efficiency**

Learn how to optimize your PM Management with Maintenance Connection tools available to you like the PM Auditing and Consistency Toolkit, as well as the PM Completion Dashboard Suite.