



# QFM Express Training Courses

## September 2018

### Dynamic Forms for Mobile – 2.5 hours

- Creating a mobile dynamic form
- Layout options and field types
- Configuring forms in the workflow
- Reporting on mobile dynamic forms

### PPM and Asset Management – 2.5 hours

- Creating and maintaining equipment groups / models
- Creating and maintaining asset records
- Creating and maintaining asset groups
- Creating and updating PPM schedules
- Managing PPM schedules via the schedule planner

### Reporting and Dashboards – 2.5 hours

- Creating event history reports
- Creating and maintaining list report views
- Scheduling reports by email
- Creating dashboards and permissions
- Standard and custom widgets
- Using custom lists and calculated values

### Resource Scheduler and Mobile – 2.5 hours

- Understanding visit status and schedule status
- Assigning visits to an operative
- Creating custom Vviews
- Processing work orders through the mobile application
- Logging events through the mobile application
- Auto-allocation of visits

### Self-Service Wizard and Event Director – 2.5 hours

#### Part A – Self-Service Wizard

- Creating a Wizard structure
- Creating and managing FM event tiles
- Creating links to QFM pages and reports
- Scoping wizard tiles for specific user groups

#### Part B – Event Director

- Creating and maintaining views
- Filtering and processing single events
- Batch processing events
- Adding watches

### User and Access Administration – 2.5 hours

- Managing personnel records
- Understanding user classes and profiles
- General settings and user access rights
- Creating and managing QFM users
- Contractors and operatives as users
- Creating and managing workgroups
- Notification templates

