

# MAXIMO APPLICATION SUITE - MANAGE: CORE DATA SETUP

Course Code: 821755

Learn how to create a new Organization and Site in Maximo Manage and discuss the core options available in the Organizations application.

This 2-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.

## What You'll Learn

After completing this course, you should be able to:

- Describe Multi-Org and Multi-Site strategy
- Plan new Organization and Site records
- Create Item and Company Sets
- Explain the usage of Organization options
- Configure basic Organization Chart of Account settings
- Create a Clearing account
- Create Classification hierarchies
- Understand the usage of Locations
- Create Location Systems

## Who Needs to Attend

Consultants, System Administrators, Support, Sales, and Users

# MAXIMO APPLICATION SUITE - MANAGE: CORE DATA SETUP

Course Code: 821755

CLASSROOM LIVE

\$2,470 CAD

2 Day

## Classroom Live Outline

### **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

### **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

### **Module 9: Locations and Location Hierarchies**

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

# MAXIMO APPLICATION SUITE - MANAGE: CORE DATA SETUP

Course Code: 821755

VIRTUAL CLASSROOM LIVE

\$2,470 CAD

2 Day

## Virtual Classroom Live Outline

### **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

### **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

### **Module 9: Locations and Location Hierarchies**

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

Jul 21 - 21, 2026 | 9:30 AM - 5:30 PM EDT

Aug 25 - 25, 2026 | 9:30 AM - 5:30 PM EST

Oct 20 - 20, 2026 | 9:30 AM - 5:30 PM EST

Dec 8 - 8, 2026 | 9:30 AM - 5:30 PM EST

# MAXIMO APPLICATION SUITE - MANAGE: CORE DATA SETUP

Course Code: 821755

ON-DEMAND

\$860 CAD

## On-Demand Outline

### **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

### **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

### **Module 9: Locations and Location Hierarchies**

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



# MAXIMO APPLICATION SUITE - MANAGE: CORE DATA SETUP

Course Code: 821755

PRIVATE GROUP TRAINING

2 Day

Visit us at [www.globalknowledge.com](http://www.globalknowledge.com) or call us at 1-866-716-6688.

Date created: 6/23/2026 6:26:39 PM

Copyright © 2026 Global Knowledge Training LLC. All Rights Reserved.