

Part 2.0: Preventive Maintenance Setup

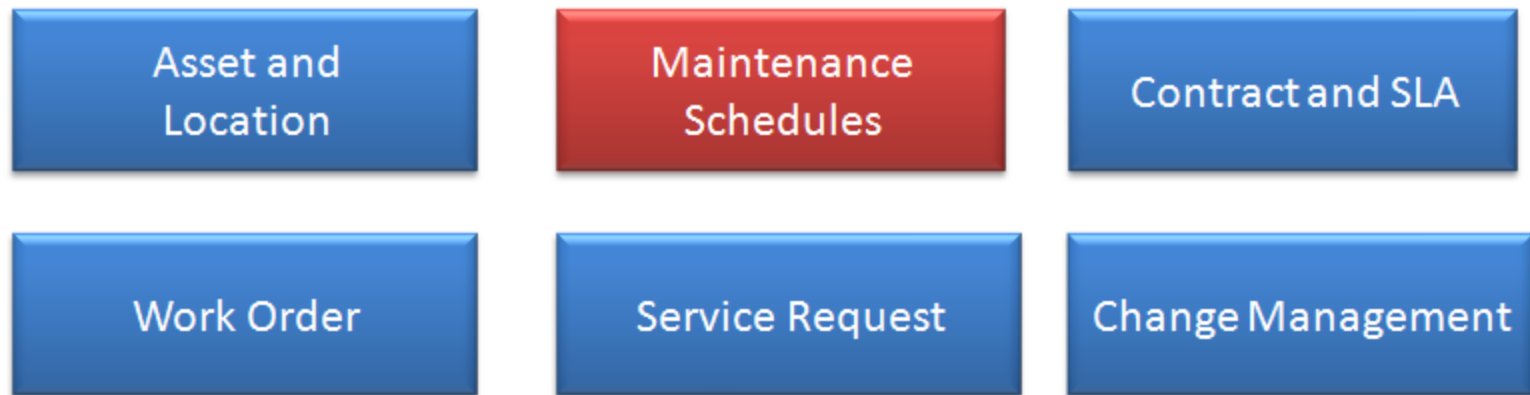
Calem Enterprise Training

Austin, Texas

Spring, 2017

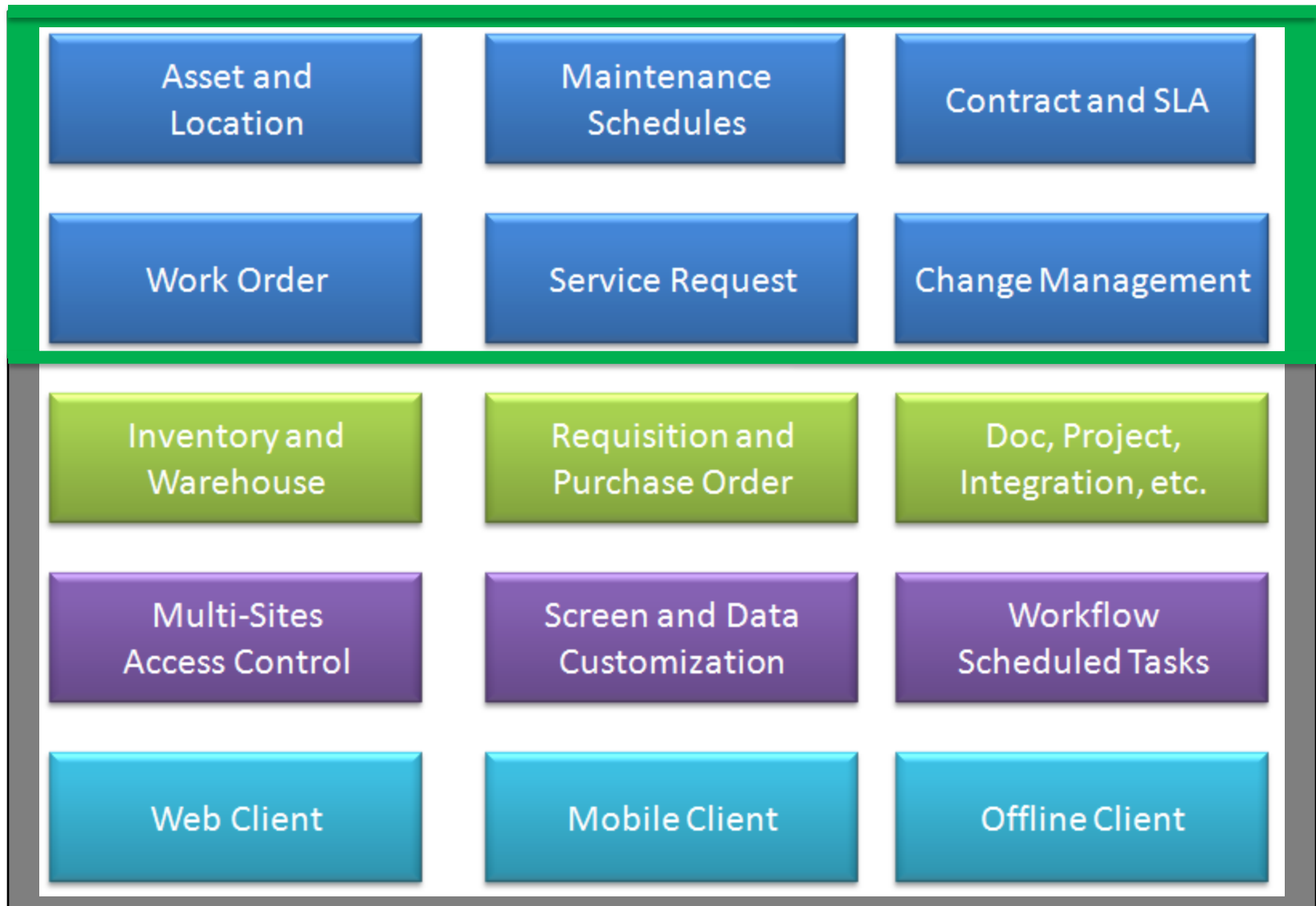


Preventive Maintenance Module is a part of the maintenance management including assets/locations, work orders, and service requests,



Product Overview – Preventive Maintenance

CalemEAM



Preventive Maintenance Setup

CalemEAM



Assets & Locations

CalemEAM

- Define locations as a hierarchy of buildings, rooms or areas.
- Define assets as a hierarchy of production lines, equipment, and components.
- Menu path: Asset module | Asset list, Location list, or Location Tree
- Import locations and assets from Calem excel templates.

The screenshot displays the CalemEAM software interface. At the top, a header bar includes the CalemEAM logo, a welcome message 'Welcome, Calem Eam. Mon, 24-Apr-2017 04:30', and the version 'Calem Enterprise 10m'. Below the header, a navigation bar contains tabs for 'Asset', 'Asset list', 'Asset Tree', and 'Location list', with 'Asset list' currently selected. To the right of these tabs are buttons for 'Open', 'Codes', and 'Report'. On the left side, a vertical sidebar lists various modules: 'Favorite', 'Dashboard', 'Admin', 'Analysis', 'Asset', 'Barcode', 'Change Mgmt', 'Contract', and 'Document'. The main content area is titled 'Asset list (4439)' and features a search bar and a toolbar with icons for 'Create SR', 'Create WO', 'Add Structure', 'Hide Inactive', 'Show Inactive', and 'Customize'. Below the toolbar is a table with the following columns: '#', 'Asset #', 'Note', 'Asset group', 'Sub-category', 'Status', and 'Location'. The table contains three rows of data:

#	Asset #	Note	Asset group	Sub-category	Status	Location
1	0911-2345	New note	MERCURY-PROD.20...	BLD.PROD	In service	B02.HQ
2	1000	Note 1000-a			In service	B08.MyLoc-1000
3	100HP-004	JJ 100 HP Compressor of 2000	JJ.100HP.2000		In service	B02.HQ

Inventory

CalemEAM

- Define global item list
- Define storerooms and locators
- Define site inventory
- Menu path: Inventory module | Items, Site Inventory, Open | Storerooms
- Import items, storerooms, locators, and site inventory from Calem excel templates

Welcome, Calem Eam. Mon, 24-Apr-2017 04:34 Calem Enterprise 10m

Inventory Site Inventories Items Open Codes Transactions Report

Favorite
Dashboard
Admin
Analysis
Asset
Barcode
Change Mgmt
Contract

Site Inventories (56)

Set price Hide In

	#	Item	Note	Site	Status	Flag	Qty in stock
☐	1	01-01-0001	bearing bush	MySite	Active		4
☐	2	01-01-0001A	bearing bush	JJ.Austin	Active		

Permit Templates

CalemEAM

- Define permit templates & lockout/tagout
- Menu path: Work Order module | Open | Permit Templates
- You can import permit templates from Calem excel templates.

The screenshot displays the CalemEAM software interface. At the top, a header bar shows the CalemEAM logo, a welcome message, the date and time (Mon, 24-Apr-2017 04:36), and the version (Calem Enterprise 10m). Below the header, a navigation bar contains the 'Work Order' module (highlighted with a red box), 'Open WO', 'Create WO', 'My Assignment', 'Open', 'Report', and 'Cost Reports'. A left sidebar lists various modules: Favorite, Dashboard, Admin, Analysis, Asset, Barcode, Change Mgmt, Contract, Document, Failure, Integration, Inventory, Offline, and Organization. The main content area shows 'My assignment (33)' with a table of work orders. The table has columns for #, Wo #, Flag, Asset #, Location, Status, Priority, and PM?. The table lists 8 work orders, all with status 'Approved' and priority 'P4'. A right sidebar contains a list of options: Open WO, WOs to Print, Scheduled WO, Completed WO (not Closed), Closed WO, All WO, WO type, Delivery Code, WO Comments, Permit Templates (highlighted with a red box), Permits, WO Emails, and W.O. generation log.

#	Wo #	Flag	Asset #	Location	Status	Priority	PM?
1	123121		401402-17	B02.HQ	Approved	P4	☒
2	122932		401402-17	B02.HQ	Approved	P4	☒
3	122743		401402-17	B02.HQ	Approved	P4	☒
4	121692		401402-17	B02.HQ	Approved	P4	☒
5	120971		401402-17	B02.HQ	Approved	P4	☒
6	120972		401402-17	B02.HQ	Approved	P4	☒
7	120973		401402-17	B02.HQ	Approved	P4	☒
8	120974		401402-17	B02.HQ	Approved	P4	☒

- Upload manuals, drawings and operational procedure files to Calem.
- Menu path: Document module | Document
- Document has to be manually loaded. It cannot be imported from Calem Excel templates.

Welcome, Calem Eam. Mon, 24-Apr-2017 04:42
Calem Enterprise 10m

Document
Document
Doc site
Doc type

Favorite
Dashboard
Admin
Analysis
Asset
Barcode
Change Mgmt
Contract
Document
Failure

Favorite
Asset list

png
Document list (91)

+
-
View file
Customize

☐	Document	File	Doc type	Note	Owner site
☐	Test-image	demo-1.png	ASSET_PIC	Testing image upload	
☐	SERVER-32x32	desktop.png			
☐	SAMPLE-DOC-001	folder_blue.png		Sample image for in-place displa...	
☐	LPTP-48x48	laptop.png			

- Set up PM Plans manually including:
 - Schedules
 - Safety Measures and Steps
 - Material and Labor requirements
 - Downtime, Document, and permits
- Menu path: PM module | PM Plan

Welcome, Calem Eam. Mon, 24-Apr-2017 04:50 Calem Enterprise 10m

Preventive Maintenance PM list **PM Plan** Open Codes Report

Asset list Site Inventories My assignment

PM Plan list (133)

	#	Plan #	Status	Subject	Sched code	Sched note	PM type	Category	Release type
☐	1	0911-METER-30...	Active	Meter-based PM job for 0911 (new...	M 4	Every 4 months on ...		Emergency	Fixed
☐	2	0911-METER-30...	Active	Meter-based PM job for 0911	Y 3	Every 36 months o...		Emergency	Fixed
☐	3	0911-METER-40...	Active	Meter-based PM job for 0911	Y 3	Every 36 months o...		Emergency	Fixed
☐	4	1-M-ROD	Active	Monthly 4th Monday maintenance	M 2	Every 2 months on ...		Preventive	Fixed
☐	5	Balloon Pump D...	Active	PM Plan from PMProcedures	K 2	Every 2 weeks on S...		Preventive	Fixed
☐	6	Bed Hill-Rom Ad...	Active	PM Plan from PMProcedures	Y 1	Every 12 months o...		Preventive	Fixed

- Set up PM by assigning PM Plans to assets/locations
- Menu path: PM module | PM
- You can import PMs and their details from Calem Excel templates

CalemEAM Welcome, Calem Eam. Mon, 24-Apr-2017 05:31 Calem Enterprise 10m

Preventive Maintenance **PM list** PM Plan Open Codes Report

Favorite Dashboard Admin Analysis Asset Barcode Change Mgmt Contract Document

PM list (166)

Customize Customize More

	#	PM #	Asset #	Location	Plan #	Subject	Status	PM code	PM Sched	Next due	Last released
☐	1	0911-2345-Me...	0911-2345	B02.HQ	0911-METER-3...	Meter-based PM job for...	Active	M 4	Every 4 months..	Sun, 03-Se...	07-May-20...
☐	2	0911-METER-3...	JJ.CA.AC-001	OH-CA-001	0911-METER-3...	Meter-based PM job for...	Active	M 4	Every 4 months..	Sun, 06-Au...	02-Apr-20...
☐	3	0911-METER-3...	200-001	CA.Building2	0911-METER-3...	Meter-based PM job for...	Active	M 4	Every 4 months..	Sun, 01-O...	04-Jun-20...

See training video of [PM Module](#) at YouTube.

See Admin Guide to set up work order generation if you
Calem Services are on premise.

**Thank You for Attending
the CalemEAM Training!**
Visit Us at www.calemeam.com

