

# CalemEAM PM Implementation

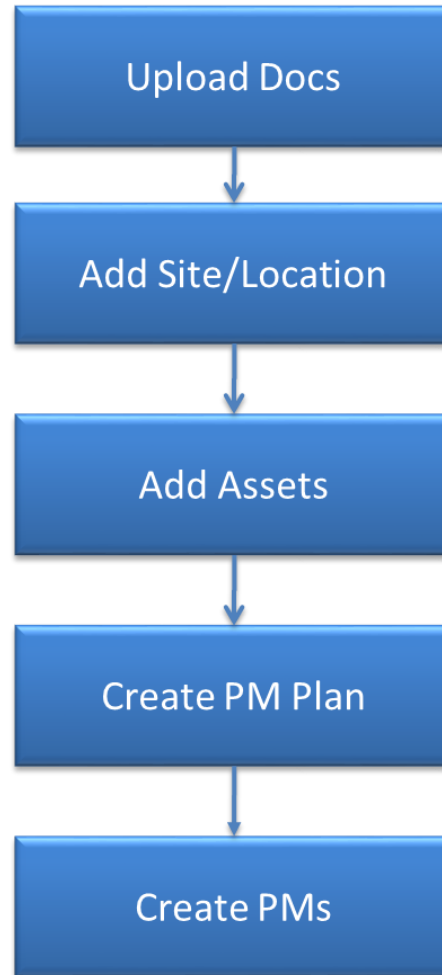
CalemEAM

Summer 2019

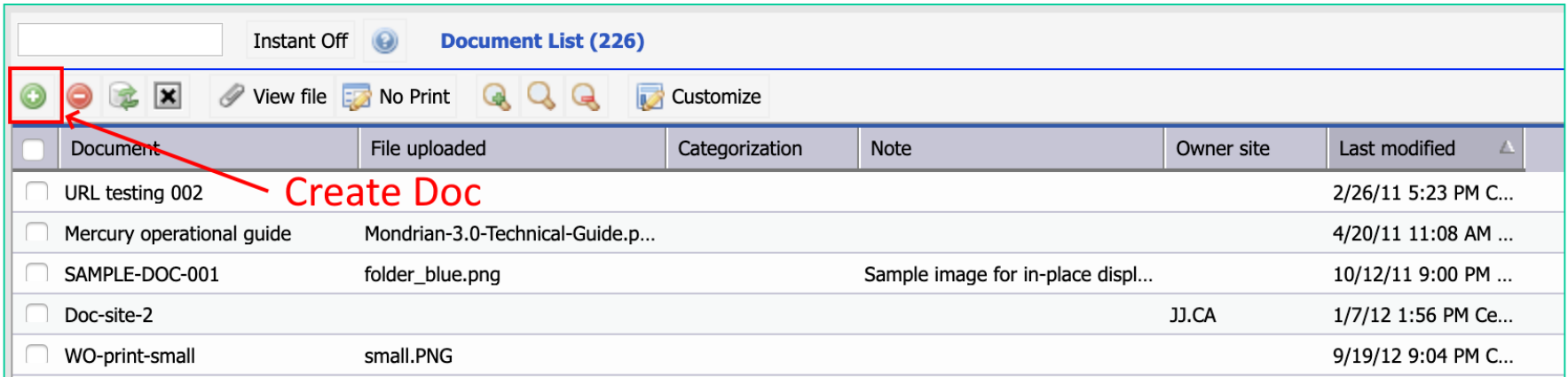
Austin, Texas



- Checklists by time (weekly, bi-weekly, monthly, quarterly, etc.)
- Supporting Docs (floor plans, manuals, photos, etc.)
- Mapping to Calem:
  - Facility to Site
  - Areas to Location
  - Equipment to Asset
  - Checklist to PM Plans
  - Checklist to PMs



- Upload supporting docs to Document module.
- Supporting docs are files of instructions, manuals, drawings, videos, etc. They can be referenced in PM Plans later.
- Menu path: Document | Document List | Create Doc



The screenshot shows the 'Document List' interface. At the top, there is a search bar, 'Instant Off' status, and a help icon. The title 'Document List (226)' is displayed. Below the title is a toolbar with icons for adding, deleting, and moving documents, along with buttons for 'View file', 'No Print', and 'Customize'. A red box highlights the 'Add' icon (a green circle with a white plus sign), and a red arrow points from the text 'Create Doc' to it. Below the toolbar is a table with columns: Document, File uploaded, Categorization, Note, Owner site, and Last modified. The table contains five rows of document entries.

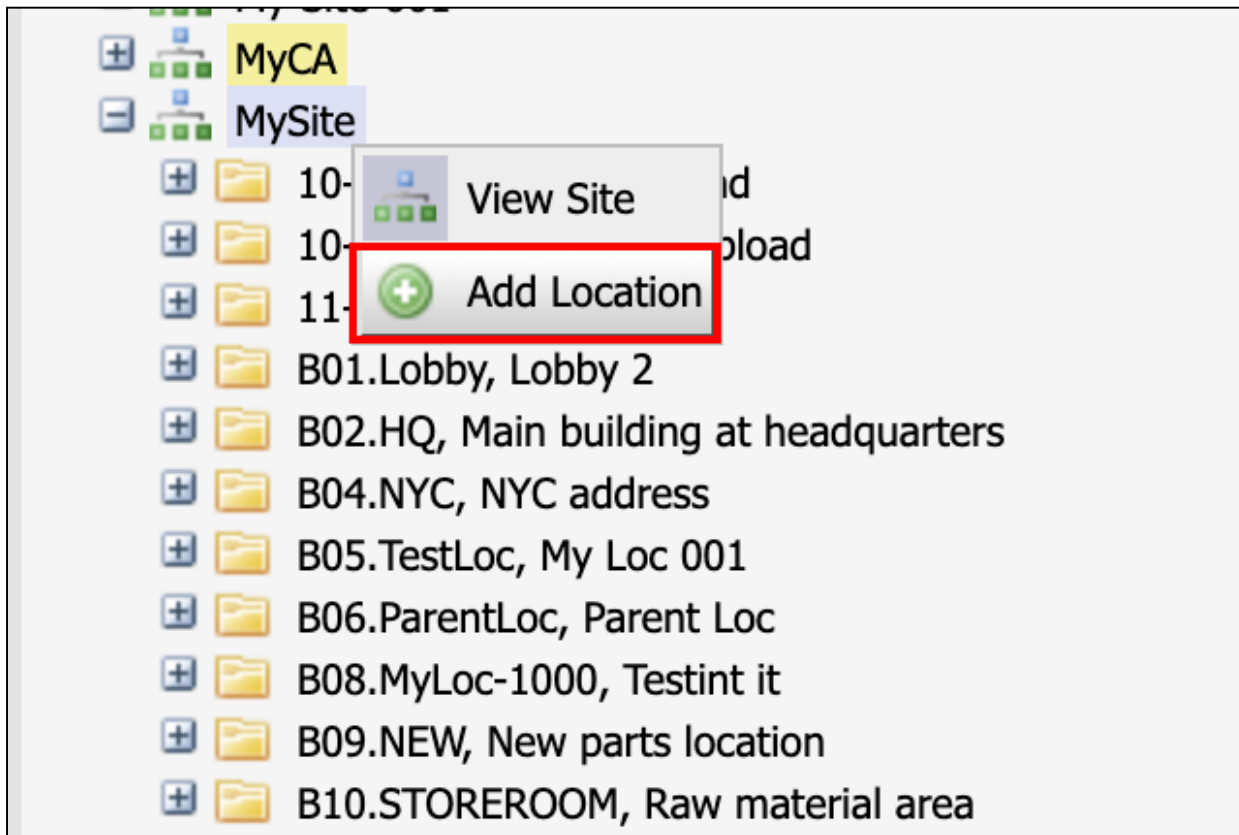
Document	File uploaded	Categorization	Note	Owner site	Last modified
<input type="checkbox"/> URL testing 002					2/26/11 5:23 PM C...
<input type="checkbox"/> Mercury operational guide	Mondrian-3.0-Technical-Guide.p...				4/20/11 11:08 AM ...
<input type="checkbox"/> SAMPLE-DOC-001	folder_blue.png		Sample image for in-place displ...		10/12/11 9:00 PM ...
<input type="checkbox"/> Doc-site-2				JJ.CA	1/7/12 1:56 PM Ce...
<input type="checkbox"/> WO-print-small	small.PNG				9/19/12 9:04 PM C...

- Sites in Calem are facilities or regions
  - For a manufacturing plant, the site is the plant.
  - For a restaurant chain, each restaurant is a site.
  - For a transportation department, each regional office is a site.
  - MyCompany and MySite are created in a Calem service. Use “MySite” for single site deployment.
- Menu path: Organization | EAM Company | Site Tab | Site List

	#	Site	Service site	Note	Inactive?	Inventory site?	Last modified
<input type="checkbox"/>	1	MyTX	MyTX	My company	<input type="checkbox"/>	<input checked="" type="checkbox"/>	9/26/19 9:57 AM ...
<input type="checkbox"/>	2	MyCA	MyCA	EAM company CA site.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	9/26/19 9:57 AM ...
<input type="checkbox"/>	3	MySite	MySite	Main Site	<input type="checkbox"/>	<input checked="" type="checkbox"/>	9/24/19 5:51 PM C...

- A location in Calem is an area in a site
  - Create a location for an area if an area is referenced in a PM checklist
  - Create a location for an area if there are equipment in the area and the equipment is referenced in a PM checklist.
- Sample area codes for a restaurant:
  - Bar
  - Patio
  - Dining
  - Kitchen
  - Parking Lot

- Menu path: Asset module | Asset Tree
- Use Asset Tree to browse hierarchy of sites, locations and assets
- Create Location for Site by right-click a site node
- Create a child location for a location by right-click a location node



- Menu path: Asset module | Location list
- Use Location List to browse locations and create a location from the list

**Create Location**

Location list (88)

Hide Inactive Show Inactive Customize

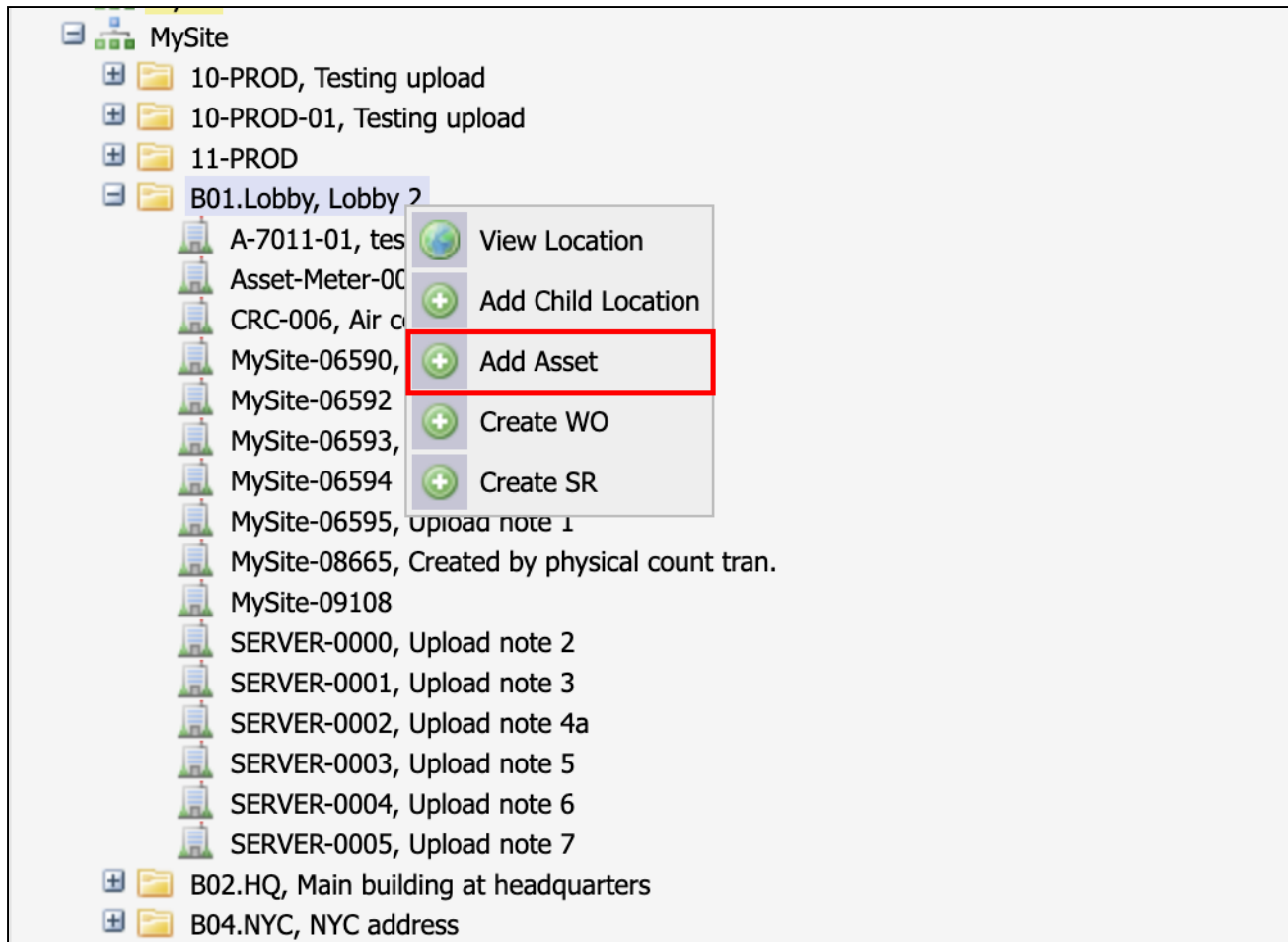
#	Location	Site	Parent	Note	Status	Priority	Categorization	Loc. group	Cost center	Last modified
1	TL-01	AustinHQ			In-Service	P3 (Other)		PROD.TIRE		9/9/18 4:1...
2	B10.STOREROOM	MySite		Raw material area		P3 (Other)		STOREROOM		7/30/18 2:...
3	SHIP.STORE.RECEIVE	MySite	B02.HQ	Warehouse and shipping ar...		P3 (Other)		SHIP.STORE.RE...		7/30/18 2:...
4	OFFICE.IT	MySite	B02.HQ	Office area		P3 (Other)		OFFICE.IT		7/30/18 2:...
5	GPS-Long-Value-1	MySite			In-Service	P2 (Produ...		OFFICE.IT		7/30/18 2:...
6	B02.HQ	MySite		Main building at headquarte...	Down	P2 (Produ...	LinuxClone	OFFICE.IT	003-235	9/16/19 5:...














- Use Calem excel template to upload locations
- Excel template “cm\_location.Locations.xls” at Step 4 of Asset Upload  
Blog: <http://www.calemeam.com/calemcustomers-2/data-upload-part-2-asset-setup>

- Assets in Calem are equipment, furniture or sewer lines.
  - Create an asset if it is referenced in a PM checklist
- Asset tags uniquely identify assets:
  - A tag may be a barcode of an asset
  - A tag may follow a naming convention such as 01.02.03.001
- An asset may have child assets if child assets have own PM checklists.

- Use asset tree to browse asset hierarchy
- Create an asset from a location code (right-click a location node)













- Menu path: Asset module | Asset list
- Use Asset List to browse assets and create an asset from the list

Instant Off  Asset list (287)												
     Create SR  Create WO    Hide Inactive  Show Inactive  Customize												
	#	Asset Tag	Note	Asset Item	Categorization	Status	Priority	Location	Bin	Site	Owner Group	Last modified
			Create an asset				P1 (Critical)					
<input type="checkbox"/>	1	01-0001-0	Schön _8LES_B01-bb	Schön _8LES	Cutting	In-Store	P1 (Critical)	B09.NEW	TC-PROD-L4	MySite		9/18/19 1...
<input type="checkbox"/>	2	1000	335011	335011	Server	In-Store	P1 (Critical)	B09.NEW	TC-PROD-L4	MySite		9/18/19 1...
<input type="checkbox"/>	3	1000-A		DELL-EDGE-1K	Server	In-Store	P1 (Critical)	B09.NEW	TC-PROD-L4	MySite		2/25/19 3...
<input type="checkbox"/>	4	100HP-006	JJ 100 HP Compressor of ...	JJ.100HP.2000		Down	P1 (Critical)	CA.Building2		My TX site		9/18/19 1...
<input type="checkbox"/>	5	100HP-007	JJ 100 HP Compressor of ...	JJ.100HP.2000	BLD.PROD	In-Service	P1 (Critical)	B07.MyCA_Site1		MySite		9/18/19 1...
<input type="checkbox"/>	6	100HP-008	JJ 100 HP Compressor of ...	JJ.100HP.2000	LinuxClone	Not-In-Se...	P1 (Critical)	B09.NEW		MySite		9/18/19 1...

- Use Calem excel template to upload assets
- See Step 5 of Asset Upload Blog:  
<http://www.calemeam.com/calemcustomers-2/data-upload-part-2-asset-setup>

- PM Plans are job specification including:
  - Time-based Schedule: weekly, bi-weekly, monthly, etc.
  - Checklist Steps
  - Supporting docs (floor plans, manuals, pictures, etc)
- Menu path: PM module | PM Plans

<div> <input type="text"/> Instant Off PM Plan list (140) Create PM Plan </div>											
<div>        Customize    More Customize </div>											
	#	Plan #	Status	Subject	Sched code	Sched note	PM Group	Category	Release type	Last modified	
<input type="checkbox"/>	1	0911-METER-3...	Active	Meter-based PM job for 0911 (ne...	M 4	Every 4 months on...	Elec PM	Emergency	Fixed	9/16/19 ...	
<input type="checkbox"/>	2	0911-METER-3...	Active	Meter-based PM job for 0911	Y 3	Every 36 months o...	Elec PM	Emergency	Fixed	11/21/17...	
<input type="checkbox"/>	3	0911-METER-4...	Active	Meter-based PM job for 0911	Y 3	Every 36 months o...	Elec PM	Emergency	Fixed	11/21/17...	
<input type="checkbox"/>	4	1-M-ROD	Active	Monthly 4th Monday maintenance	M 2	Every 2 months on...		Preventive	Fixed	9/17/19 ...	

- Populate Plan #, subject, repeat schedule and description

[PM Plan list List](#) > PM Plan Create

**PM Plan**

Save Cancel Customize

Ready to save changes.

---

**Plan #:**

**Subject:**

**Status:**

**PM Group:**

**Category:**

**Specialty:**

**Duration (hours):**

**Schedule type:**

**Release type:**

**Review reqd?:** ☐

**Reference?:** ☐

**Site access?:** ☐

**No default steps?:** ☐

**Meter Set:**

**Sort #:**

**Repeat schedule:**

☐ Weekly ☐ Sun ☐ Mon ☐ Tue ☐ Wed ☐ Thur ☐ Fri ☐ Sat

☐ Every  weeks on

☒ Every  months on

☐ Day of week

☒ Day of month

☐ Every  days

**Description:**

- Add supporting docs at “Document” tab
- The docs have been uploaded in the Document module

PM Plan PM Labor Material Step Document Work Order Cloned Log Permit Customize

**PM Plan (1 of 1)**

Plan #: HVAC Monthly

Subject: HVAC monthly inspection

**PM Document (0)**

Add supporting docs

Seq Doc Id Note Last modified

Create








No results found.



- Add checklist steps from PM Steps list in the “Step” Tab

PM PlanPMLaborMaterialStepDocumentWork OrderClonedLogPermitCustomize






**PM Plan (1 of 1)**

Customize

Plan #: HVAC Monthly






Subject: HVAC monthly inspection

**PM Safety (0)**

From RepositoryCustomize

Seq	Description	Repo
No results found.		

**PM Step (2)**

From RepositoryCustomize

Seq	Description	Assembly	Repo	Last modified
<input type="checkbox"/>	10 Replace filters if necessary			9/26/19 11:22 A...
<input type="checkbox"/>	20 Electrical board inspected	ENG	T008	9/26/19 11:22 A...

- If you have a list of steps in excel, PDF or other docs, use Calem excel template to prepare the steps and upload to Calem
- See Step 4 of this blog: <http://www.calemeam.com/calemcustomers-2/data-upload-part-3-preventive-maintenance>

- PMs are work order templates to perform a PM Plan on an asset/location
- Create a PM from the PM Tab of PM Plan
- PM work orders are generated from PMs by Calem

PM Plan (1 of 1)

Plan #: HVAC Monthly

Subject: HVAC monthly inspection

PM list (0)

Create a PM

PM #	Asset Tag	Location	Subject	Status	Next due	Last modified
No results found.						

- Set an asset tag to perform the PM Plan
- Set “Next due” as the initial date/time when the PM should be completed
- Calem will generate a PM work order based on the initial date, and generate future work orders based on time schedule of a PM Plan
- Optionally set Priority, Assigned To, Team assigned, etc.

[PM Plan](#) > PM Create

**PM**

Save Cancel Customize

Ready to save changes.

---

**Asset or Location (not both)**

**Asset Tag:**

**Location:**

**Next due:**

**Days ahead:**

**Last released:**

**Release count:**

**Last done:**

**Work Order Release**

**Status:**

**Priority:**

**Origination:**

**Assigned To:**

**Account:**

**PM?:** ☒

**Description:**

**WO Status:**

**Requester:**

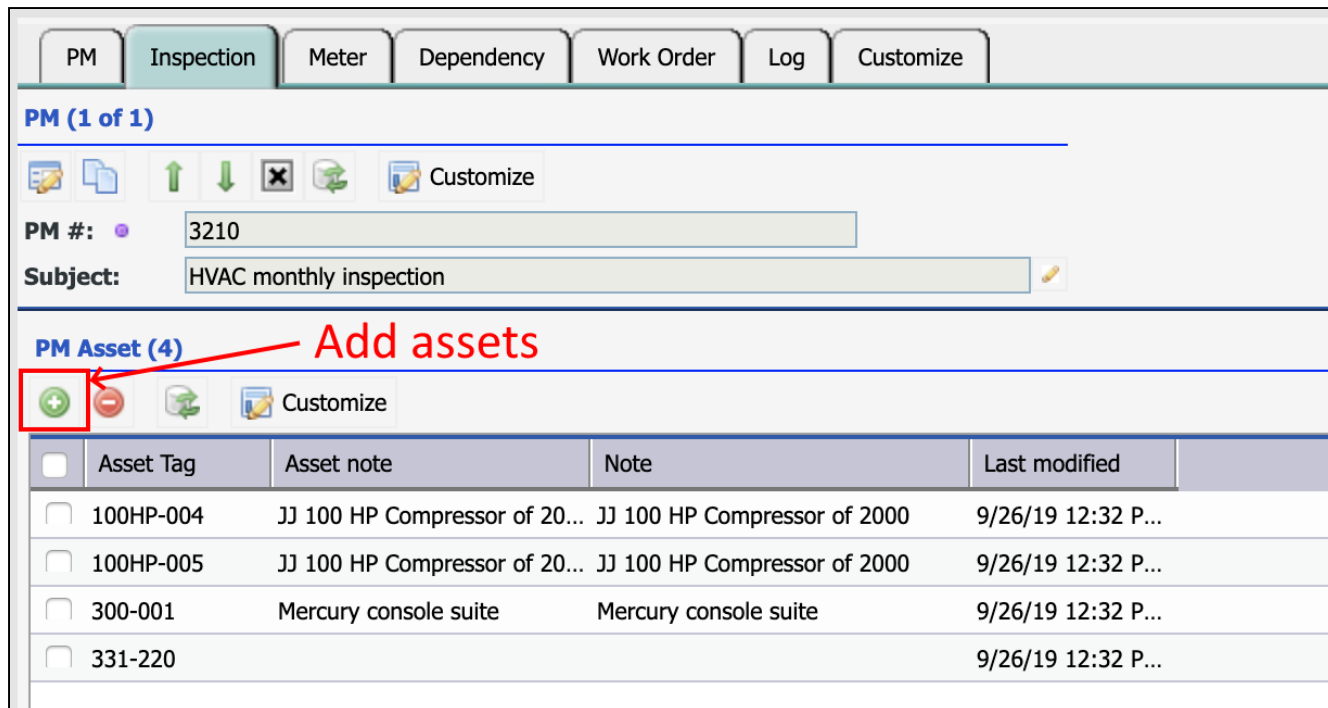
**Team assigned:**

**Dept:**

# PM – Asset List & Round

CalemEAM

- Add assets to a PM for these assets to be serviced by the same PM – only one PM work order is generated for the PM.
- Alternatively, create a PM for each asset so a separate PM work order is generated for each asset.
- PM Rounds are another way to plan PMs – see this blog:  
<http://www.calemeam.com/calemcustomers-2/when-to-use-pm-inspection-and-rounds>



PM (1 of 1)

PM #: 3210

Subject: HVAC monthly inspection

PM Asset (4)

**Add assets**

<input type="checkbox"/>	Asset Tag	Asset note	Note	Last modified
<input type="checkbox"/>	100HP-004	JJ 100 HP Compressor of 20...	JJ 100 HP Compressor of 2000	9/26/19 12:32 P...
<input type="checkbox"/>	100HP-005	JJ 100 HP Compressor of 20...	JJ 100 HP Compressor of 2000	9/26/19 12:32 P...
<input type="checkbox"/>	300-001	Mercury console suite	Mercury console suite	9/26/19 12:32 P...
<input type="checkbox"/>	331-220			9/26/19 12:32 P...

- PM work orders are generated from PMs
- Supporting docs are copied from PM Plans to work orders
- Checklist steps are copied to PM work orders
- PM Asset list are copied to PM work orders
- PM Rounds are generated into PM work orders with each round stop as a separate PM work order.

1 Submission

2 Planning

3 Execution

4 Review











































5 Close

History

DataView

Customize

Work Order (1 of 8276)



More

Customize

Wo #:

183489

Asset Tag:

MySite-04204

Model:

Location:

B05.TestLoc

Priority:

P4

Need by:

Mon, 11/11/19 8:00 PM Eastern

Status:

New

Category:

Emergency

Specialty:

Parent wo #:

Subject:

PM\_Weekly

PM #:

WeeklyPM-932

Asset note:

Asset Categorization:


Site:

MySite

Service site:

MySite

Flag:



PM?:

☒

Is inspection?:

☐

Categorization:

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- You may take free online training for modules covered in this presentation at <http://www.calemeam.com/training>
  - 2.0 Asset Module
  - 2.1 Preventive Maintenance Module
  - 2.3 Work Order Module

**Thank You for Attending  
the CalemEAM Presentation!**

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Information.**

***Live Demo at <https://demo.calemeam.com>***

