CalemEAM PM Implementation

CalemEAM

Summer 2019

Austin, Texas

PM Checklist Overview

- 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

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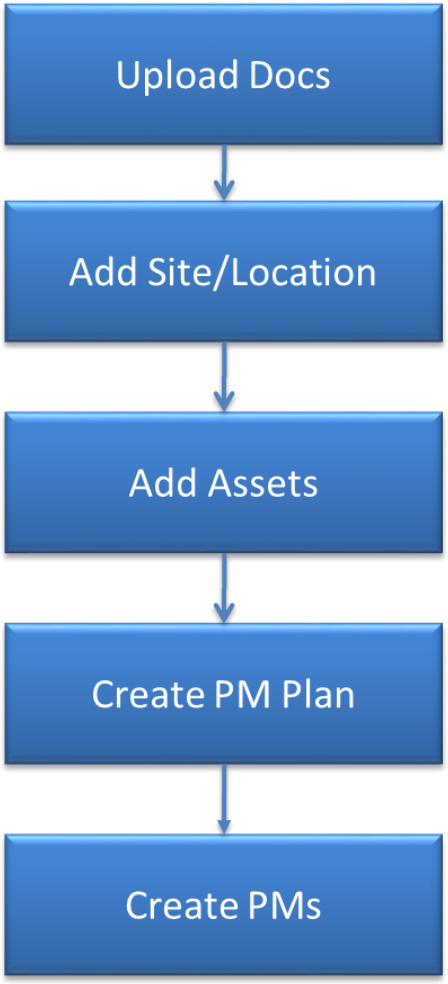
PM Checklist Implementation



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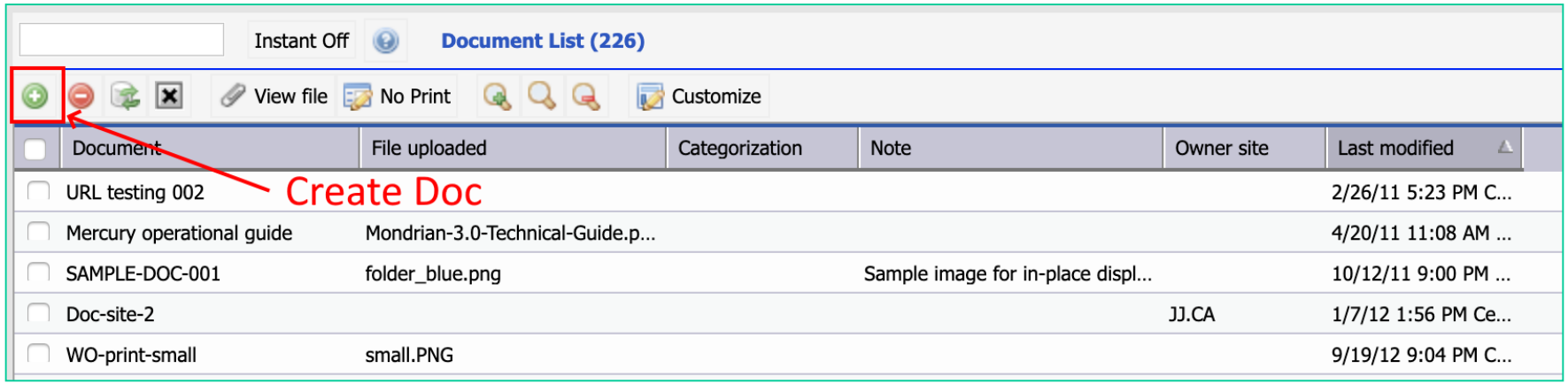
Supporting Docs

- 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



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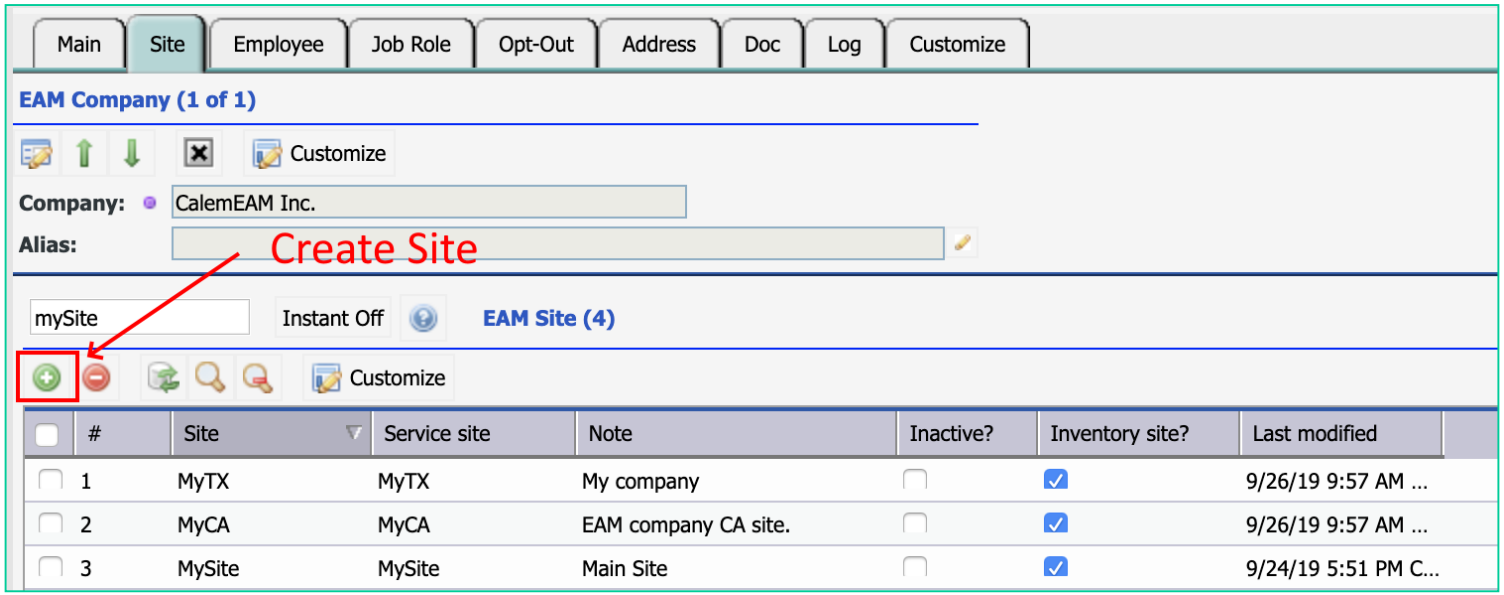
Sites

- 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



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Locations

- 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 checlist.
- Sample area codes for a restaurant:
  - Bar
  - Patio
  - Dining
  - Kitchen
  - Parking Lot

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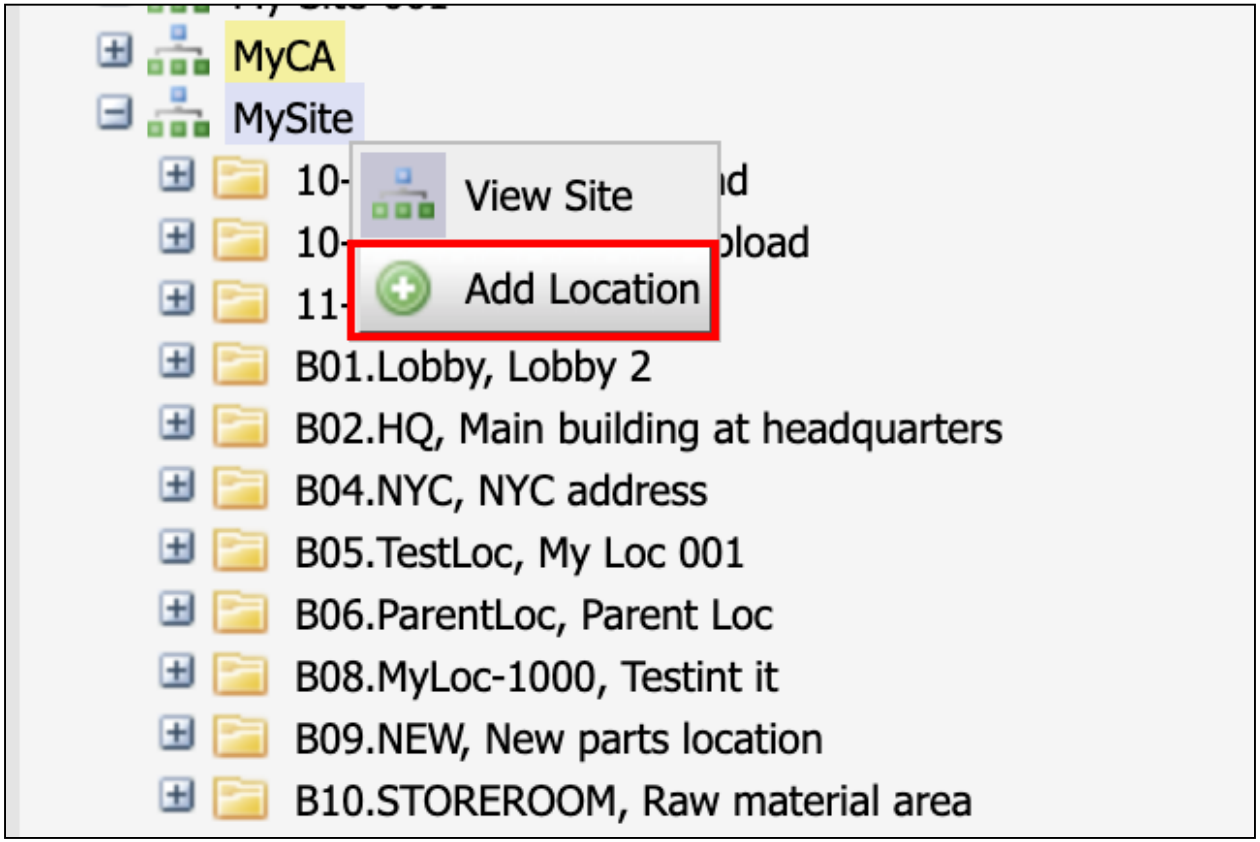
Asset Tree

- 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



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Location List

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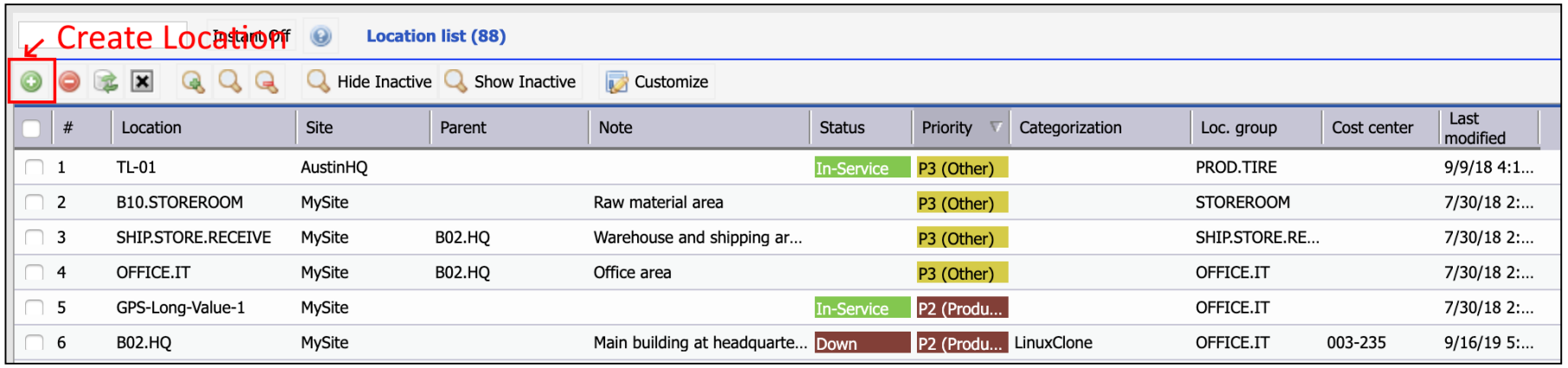
- Menu path: Asset module | Location list
- Use Location List to browse locations and create a location from the list



#	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:...

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Upload Locations

- 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

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Assets

- 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.

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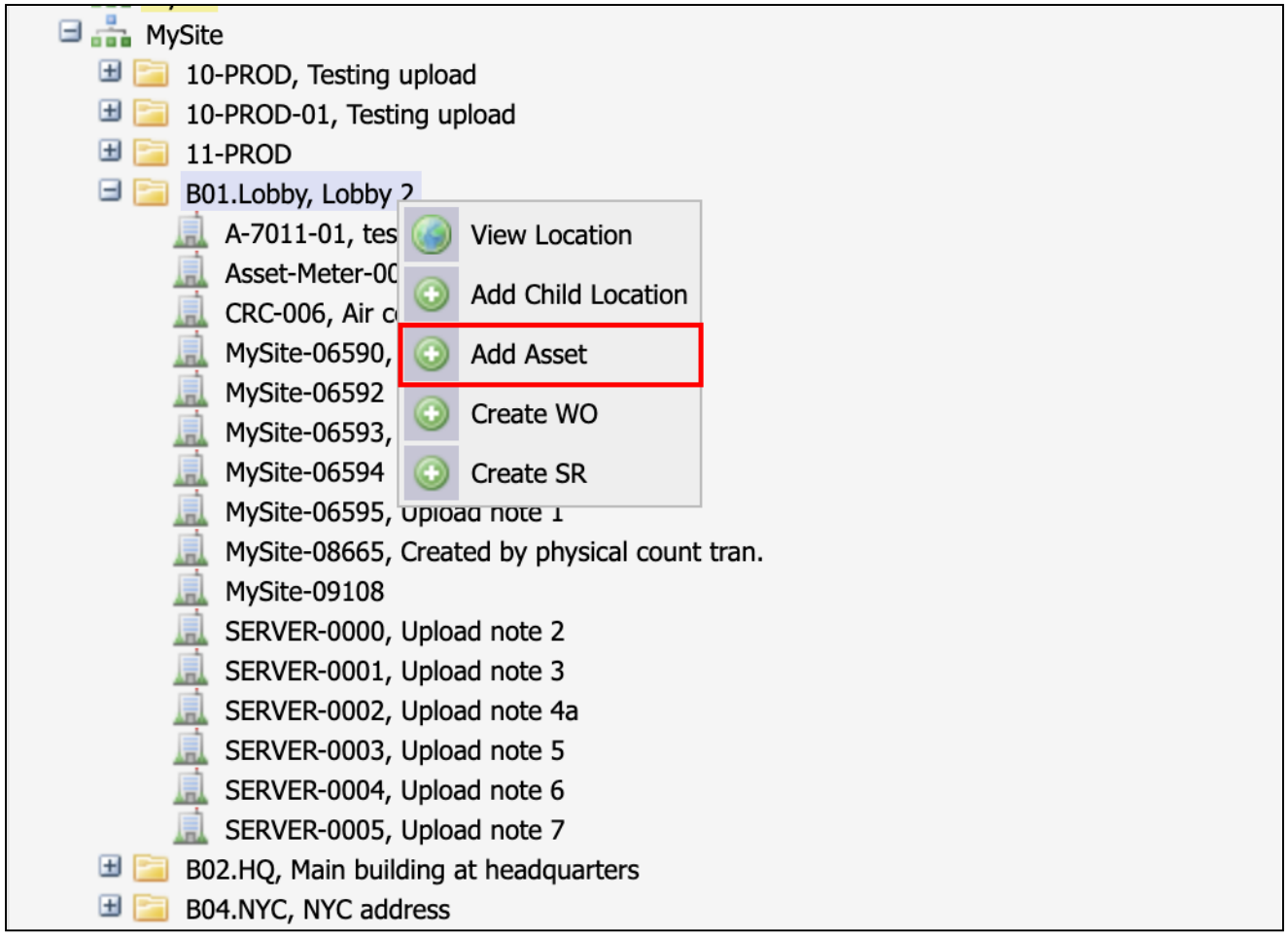
Asset Tree

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



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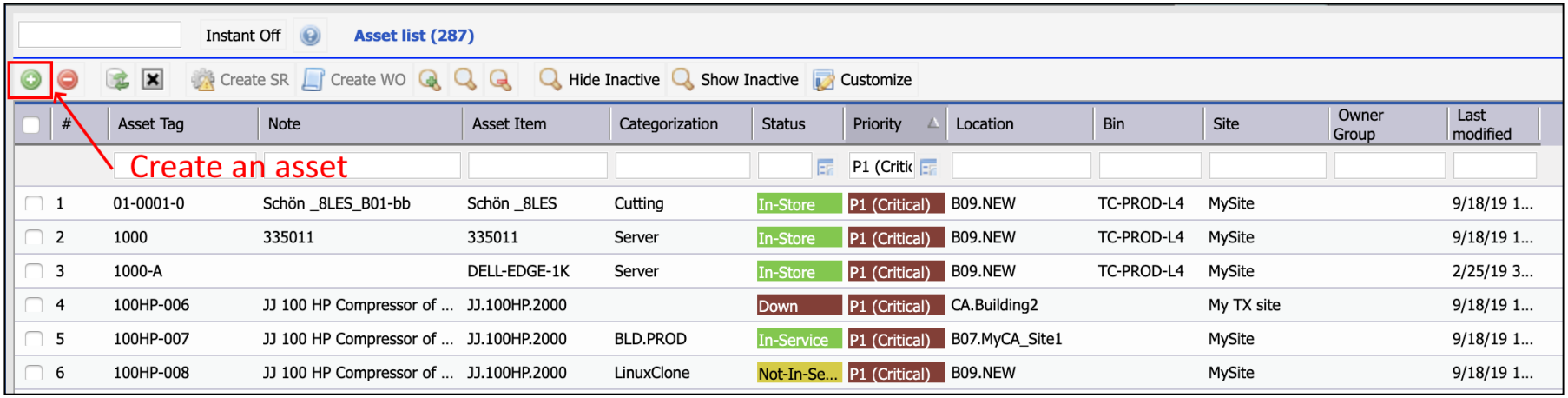
Asset List

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



#	Asset Tag	Note	Asset Item	Categorization	Status	Priority	Location	Bin	Site	Owner Group	Last modified
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...
2	1000	335011	335011	Server	In-Store	P1 (Critical)	B09.NEW	TC-PROD-L4	MySite		9/18/19 1...
3	1000-A		DELL-EDGE-1K	Server	In-Store	P1 (Critical)	B09.NEW	TC-PROD-L4	MySite		2/25/19 3...
4	100HP-006	JJ 100 HP Compressor of ...	JJ.100HP.2000		Down	P1 (Critical)	CA.Building2		My TX site		9/18/19 1...
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...
6	100HP-008	JJ 100 HP Compressor of ...	JJ.100HP.2000	LinuxClone	Not-In-Se...	P1 (Critical)	B09.NEW		MySite		9/18/19 1...

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Upload Assets

- 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

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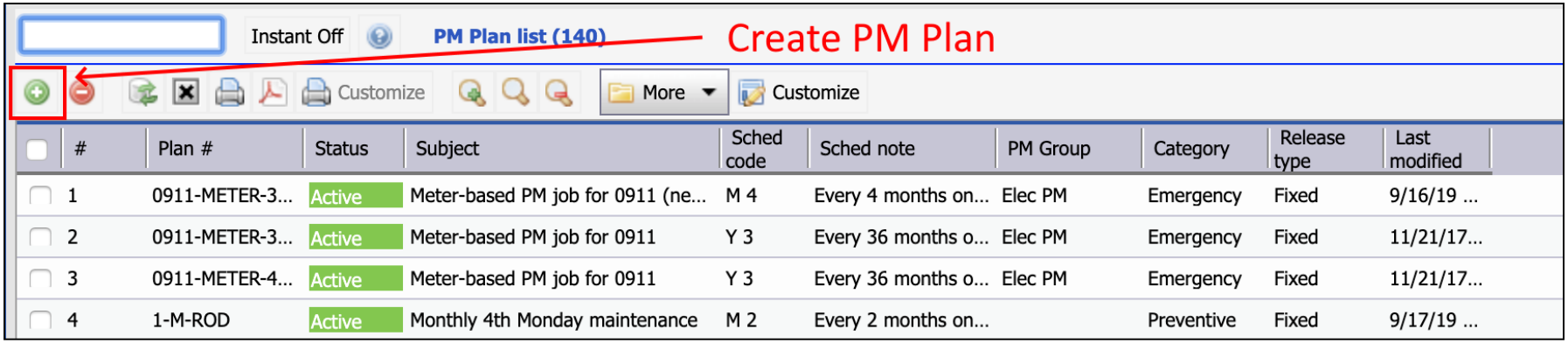
PM Plans

- 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



#	Plan #	Status	Subject	Sched code	Sched note	PM Group	Category	Release type	Last modified
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 ...
2	0911-METER-3...	Active	Meter-based PM job for 0911	Y 3	Every 36 months o...	Elec PM	Emergency	Fixed	11/21/17...
3	0911-METER-4...	Active	Meter-based PM job for 0911	Y 3	Every 36 months o...	Elec PM	Emergency	Fixed	11/21/17...
4	1-M-ROD	Active	Monthly 4th Monday maintenance	M 2	Every 2 months on...		Preventive	Fixed	9/17/19 ...

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PM Plan – HVAC Monthly

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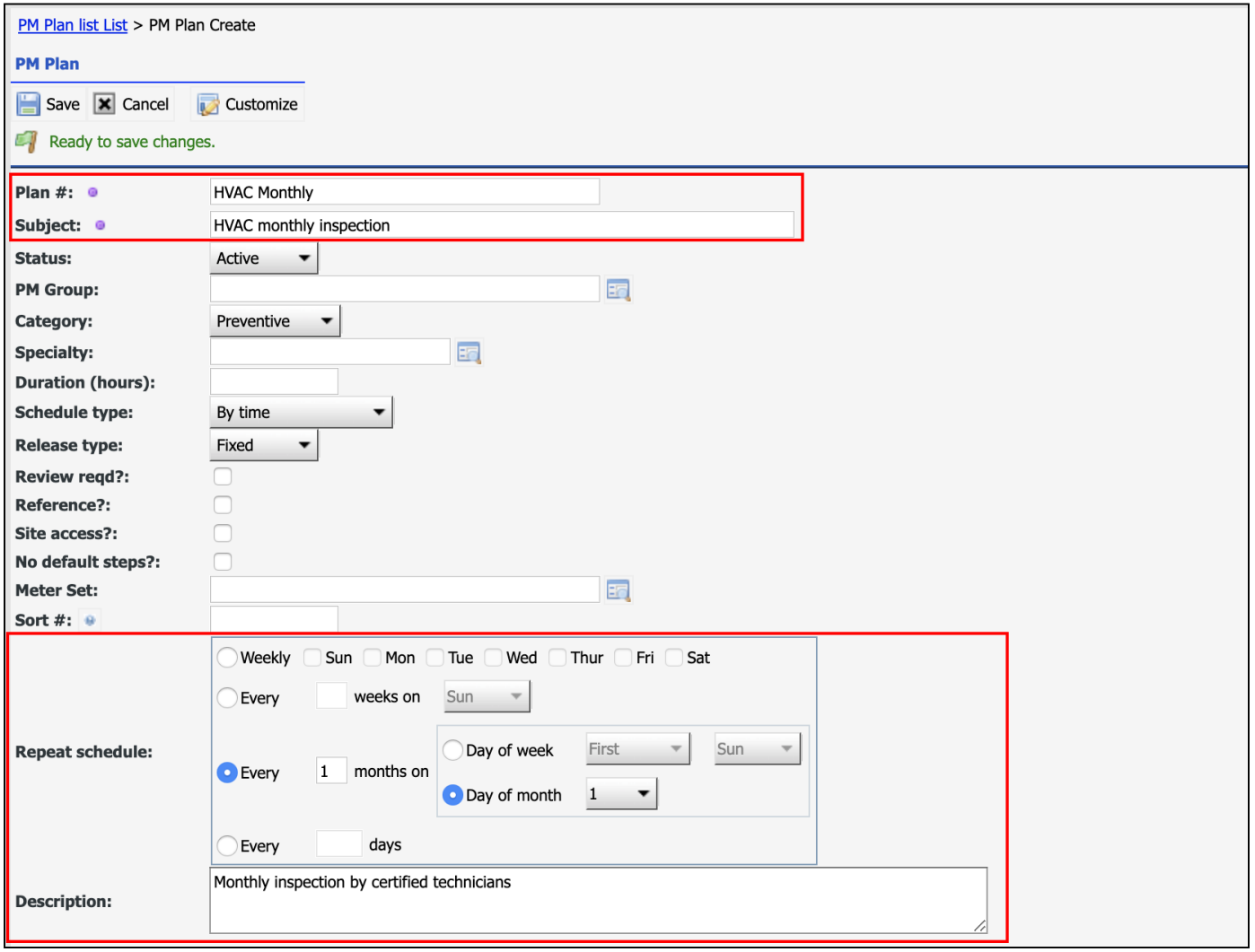
- Populate Plan #, subject, repeat schedule and description



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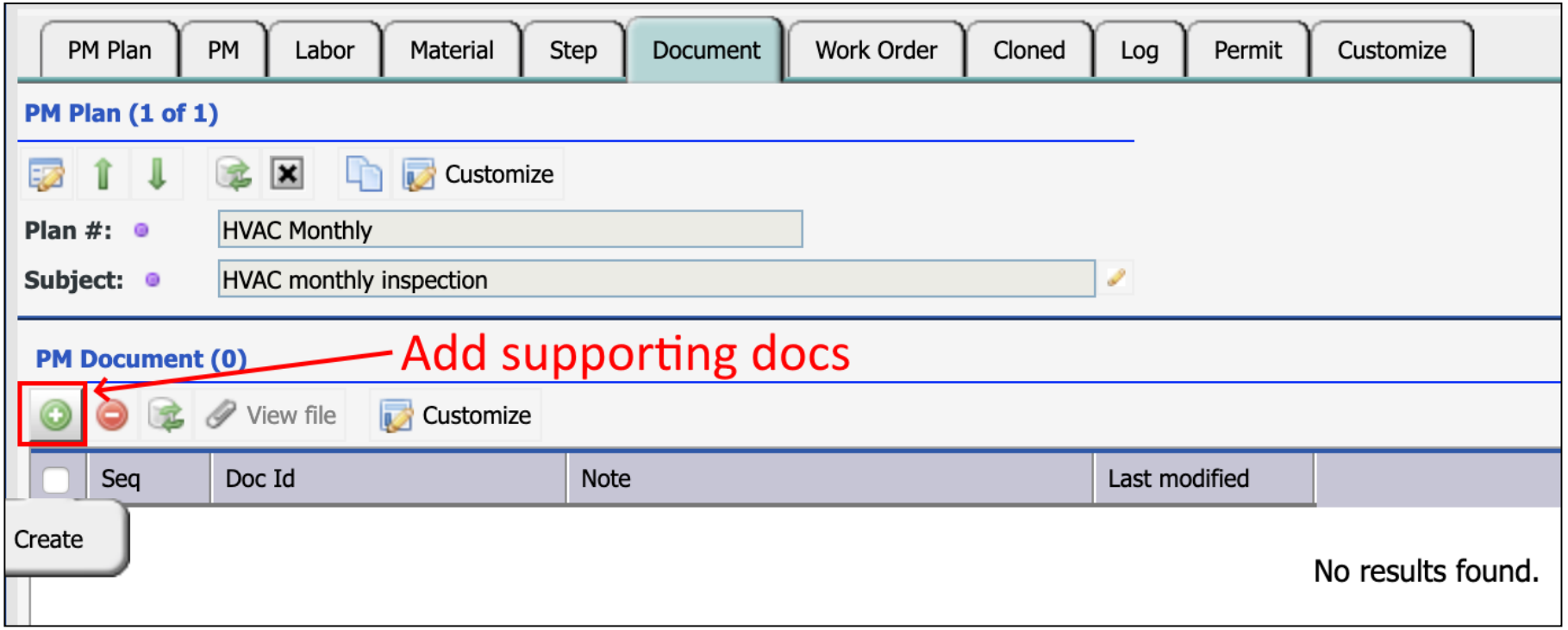
PM Plan – Docs

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



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PM Plan – Steps

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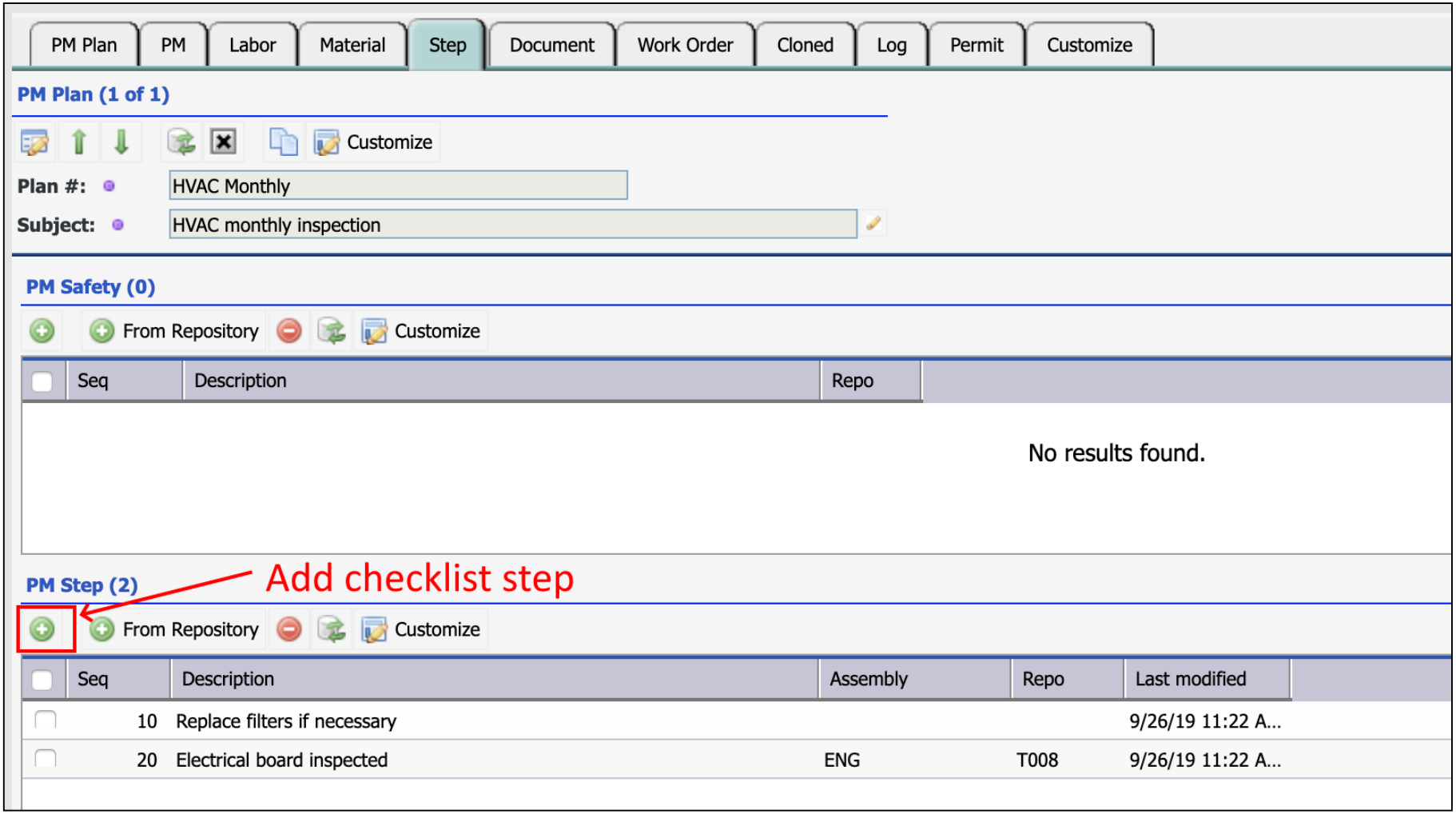
- Add checklist steps from PM Steps list in the “Step” Tab



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PM Plan – Upload Steps

- 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

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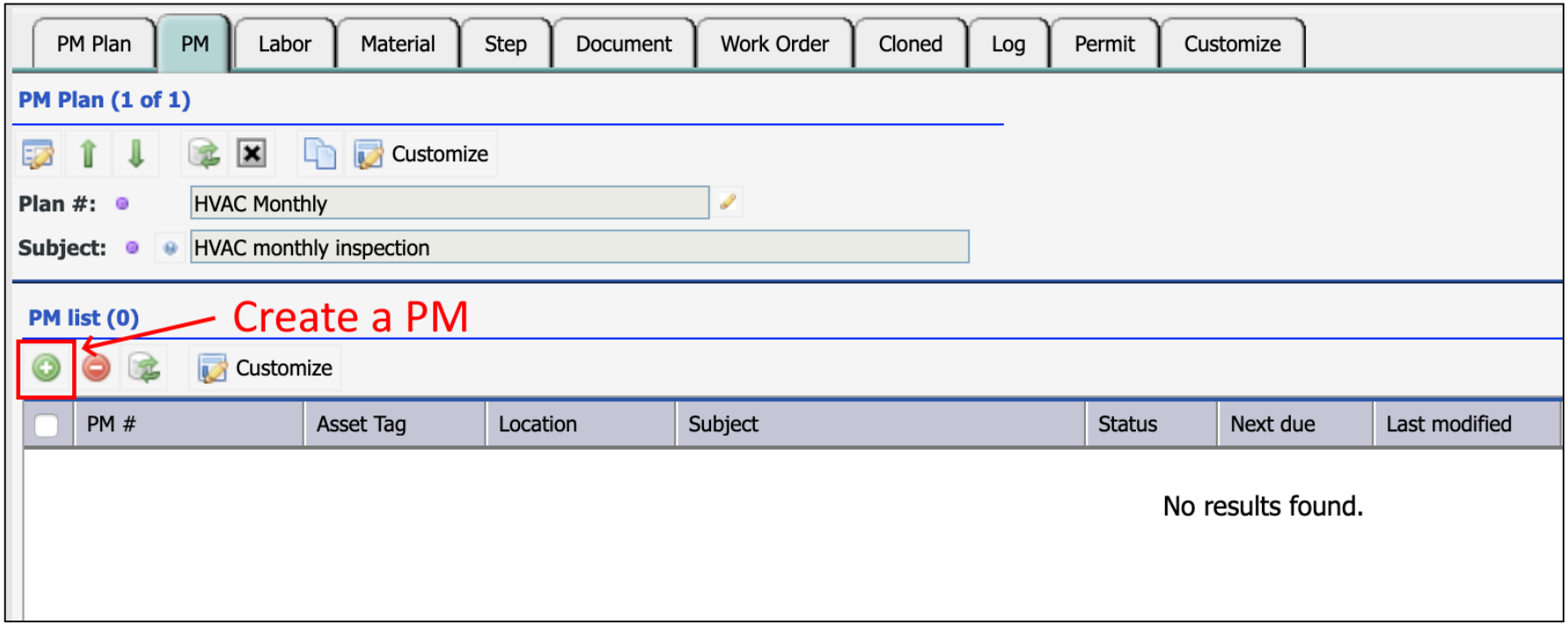
PM

- 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



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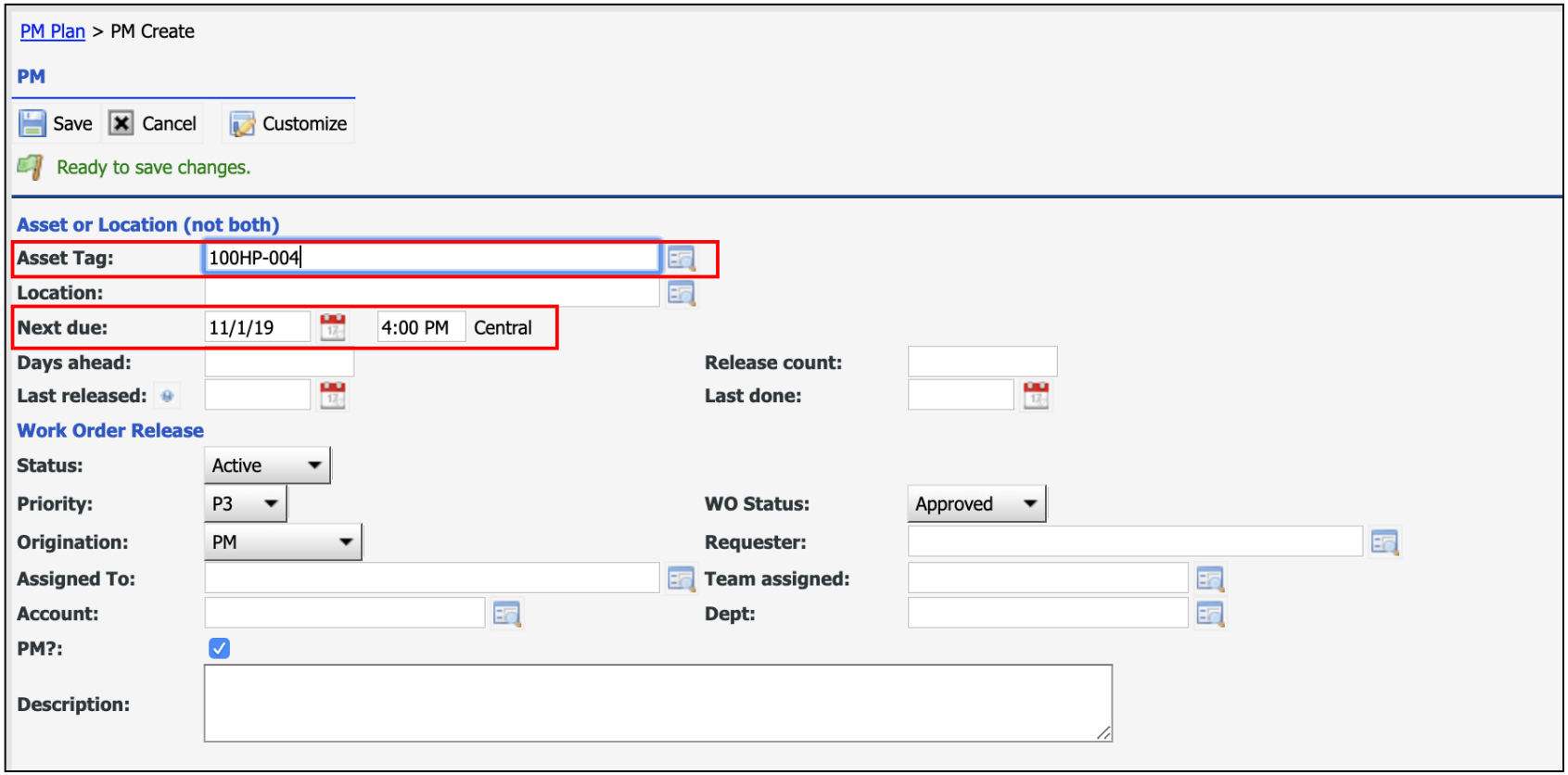
PM – Asset and Next Due

- 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.



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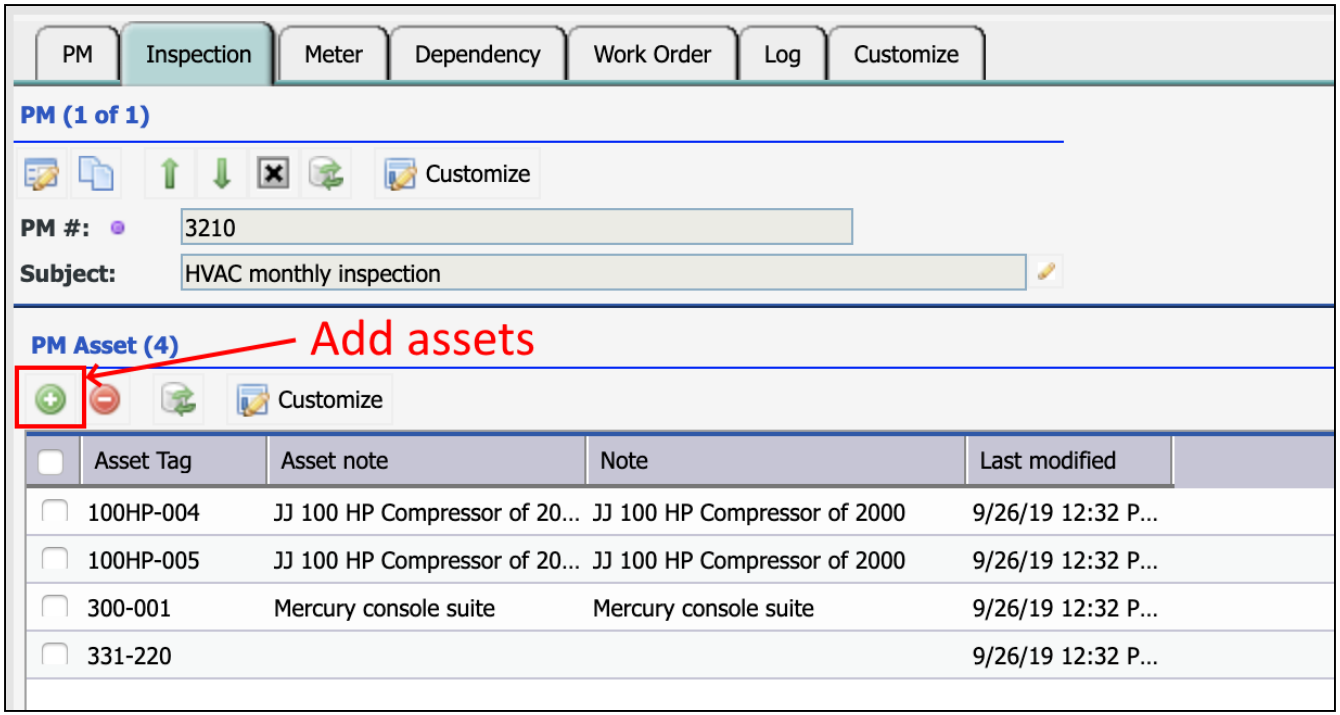
PM – Asset List & Round

- 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



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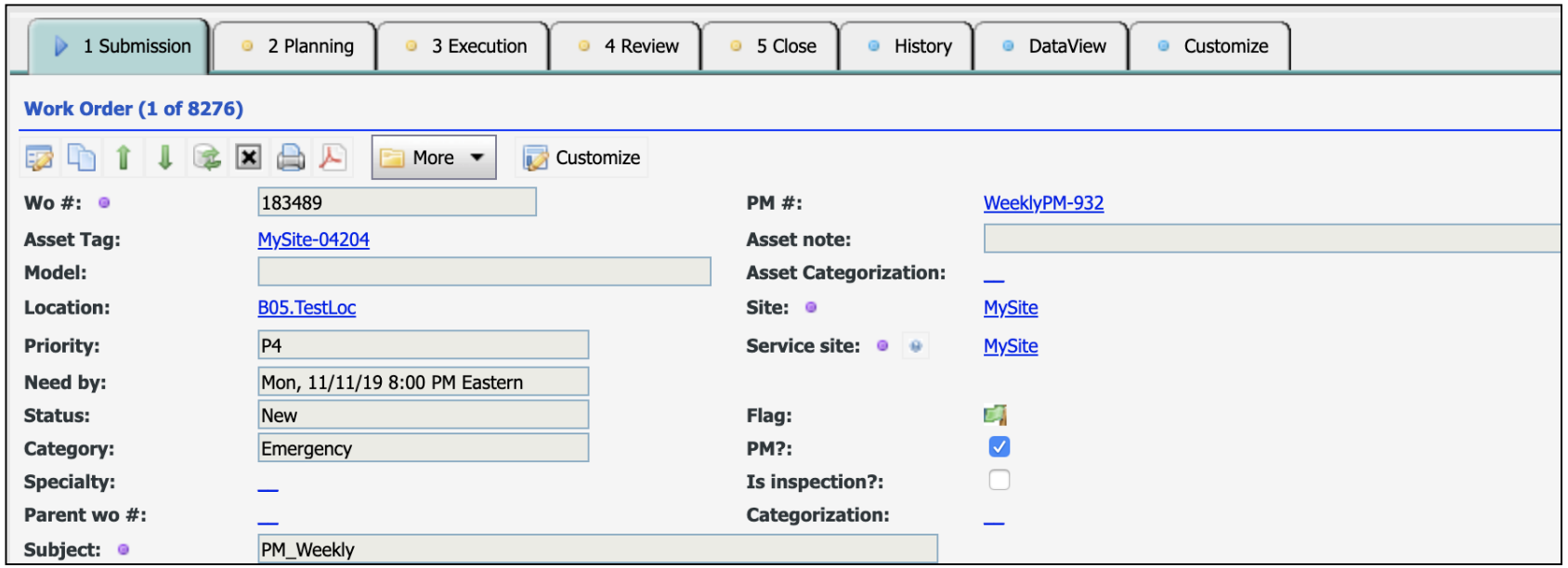
PM Work Order

- 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.



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References

- 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

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Thank You!

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