

Part 2.0: Maintenance Functions – UI & Asset

Calem Enterprise Training

Summer 2022

Austin, Texas



Goals – User Interface

I know how to search a list (FreeForm, SearchRow, Advanced)

I know how to use forms (List, Read, Multi-Tab, Detail Lists)

I know how to create/edit an object (main and detail objects)

I know how to save an advanced search for re-use

I know how to pin and close form tabs of the desktop

Goals – Assets

I know how to setup Asset Module

I know how to create Class tree

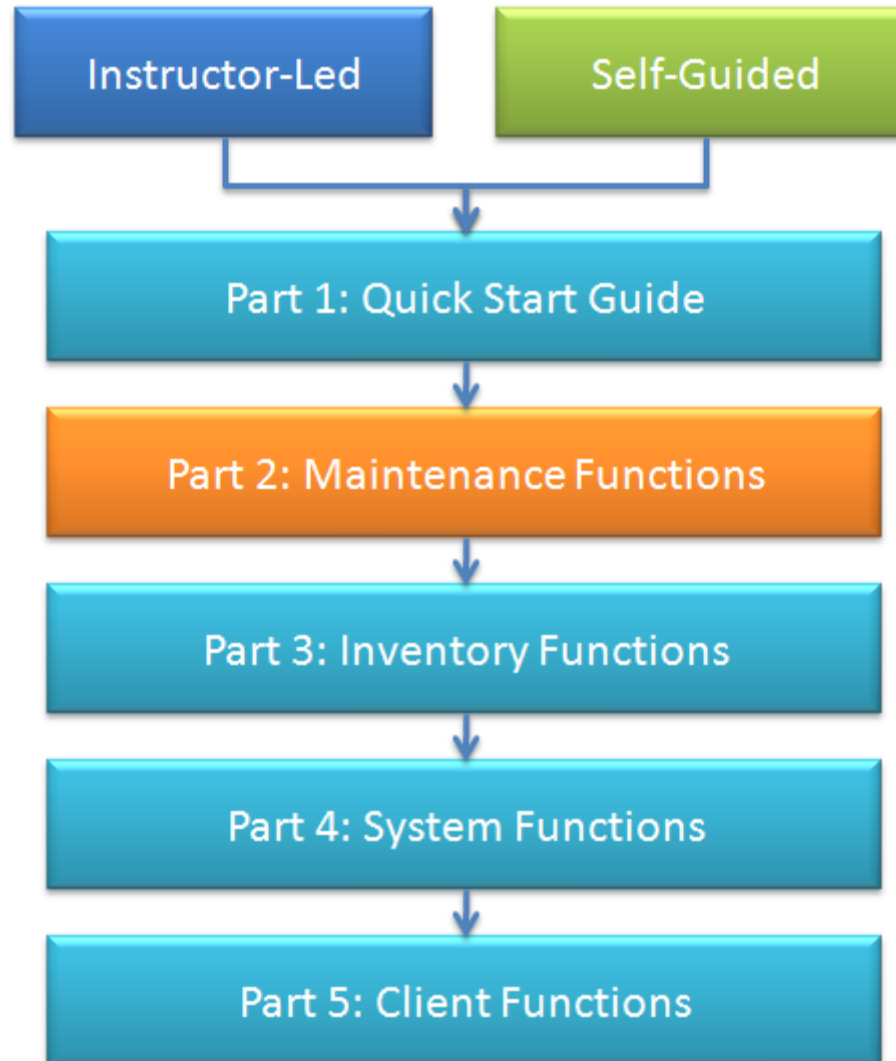
I know how to create asset items

I know how to create location tree

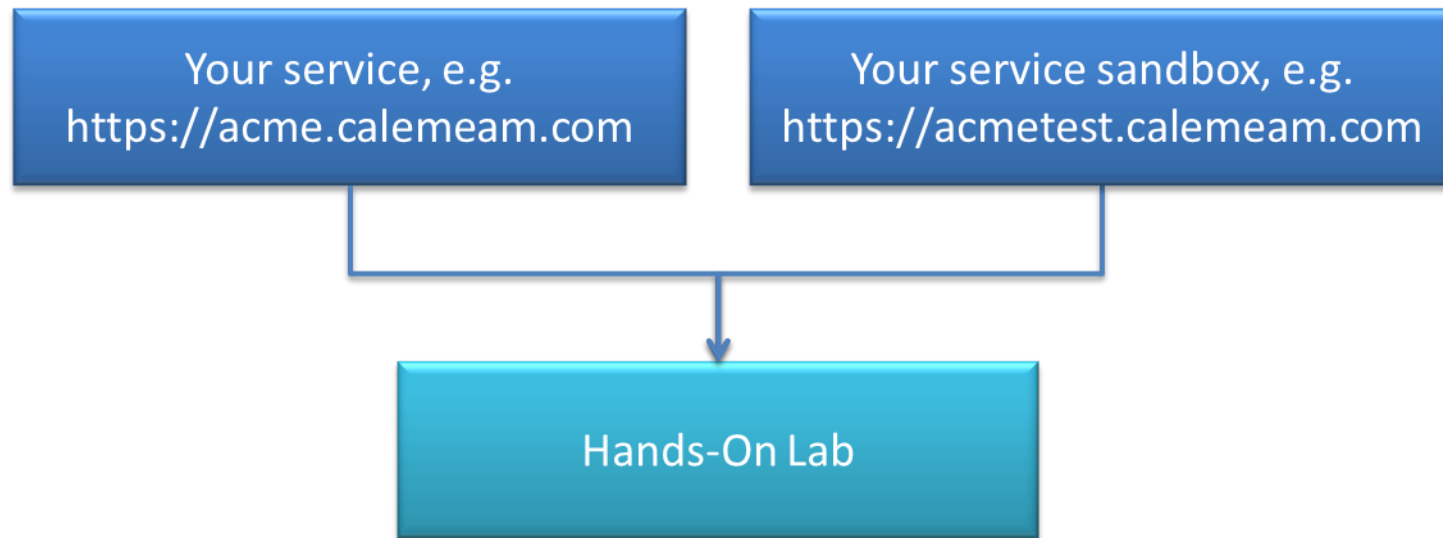
I know how to create assets

I know how to create asset meters

I know that how to populate asset module via excel files



- The Sandbox of your service is the ideal place to do hands-on lab.



- CalemEAM Overview
- Product Overview
- Maintenance Functions:
 - Asset and Locations
 - Preventive Maint Schedules and Failures
 - Work Order, Service Request and Change Mgmt
 - Work Order Scheduling
 - Dashboard



COMPANY

- Initiated in 2006.
- CalemEAM v1.0 Released in May 2007.
- A Texas Corporation since 2007.

MISSION

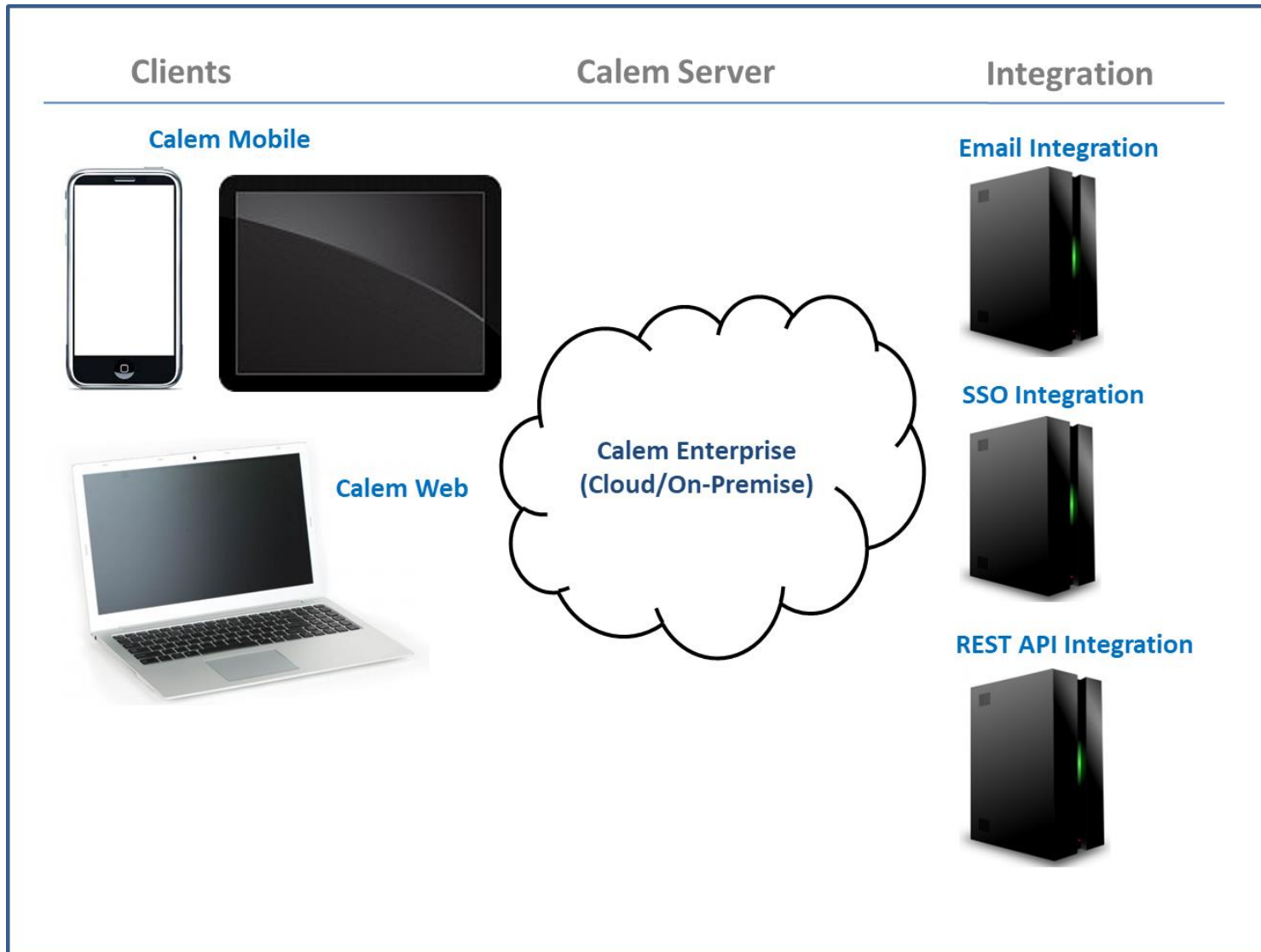
- Better EAM/CMMS Solutions and Better Customer Services

PRODUCT

- Calem Enterprise Subscription:
 - Calem Enterprise
 - Maintenance & Upgrade
 - Technical Support

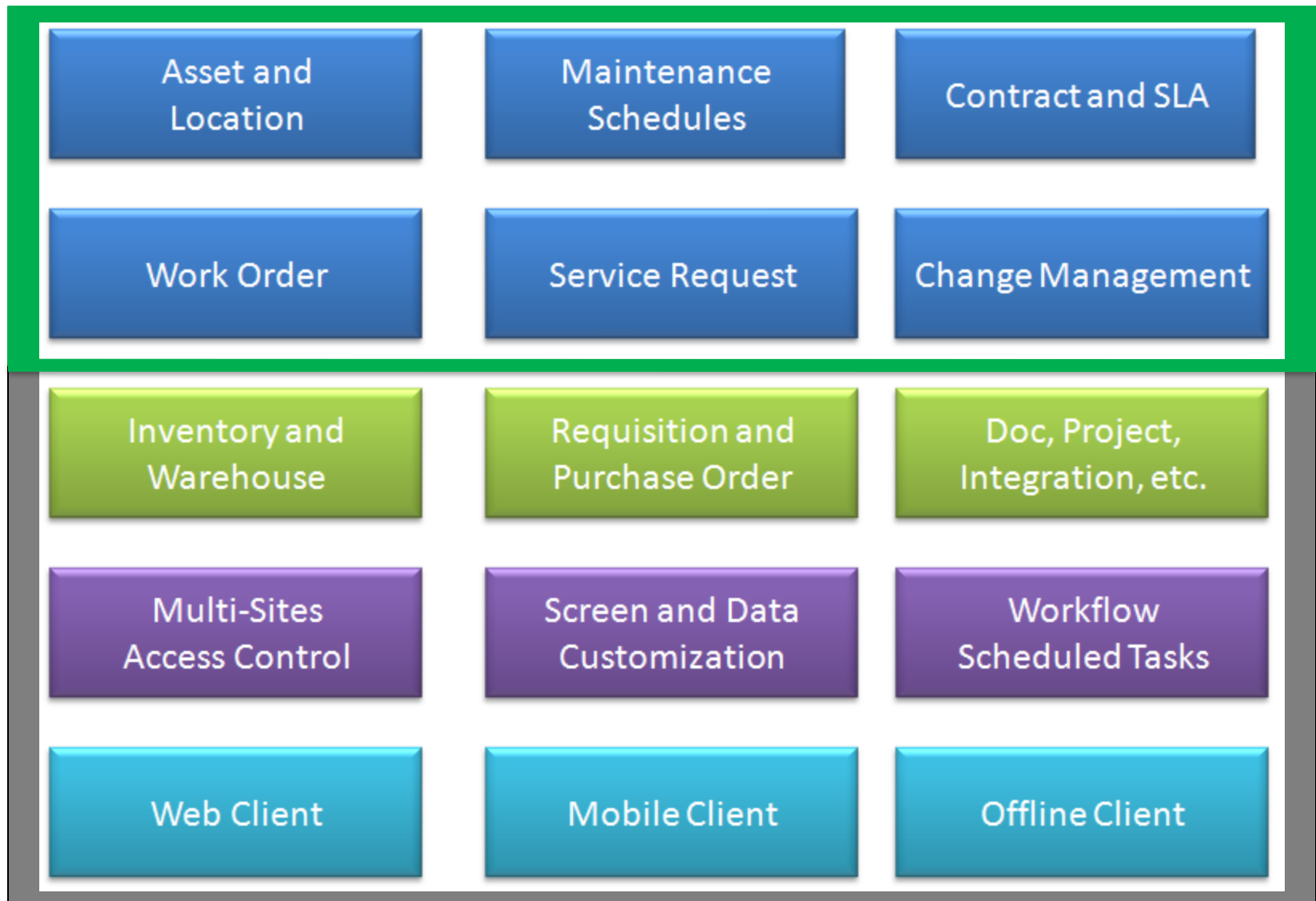
Product Overview – Architecture

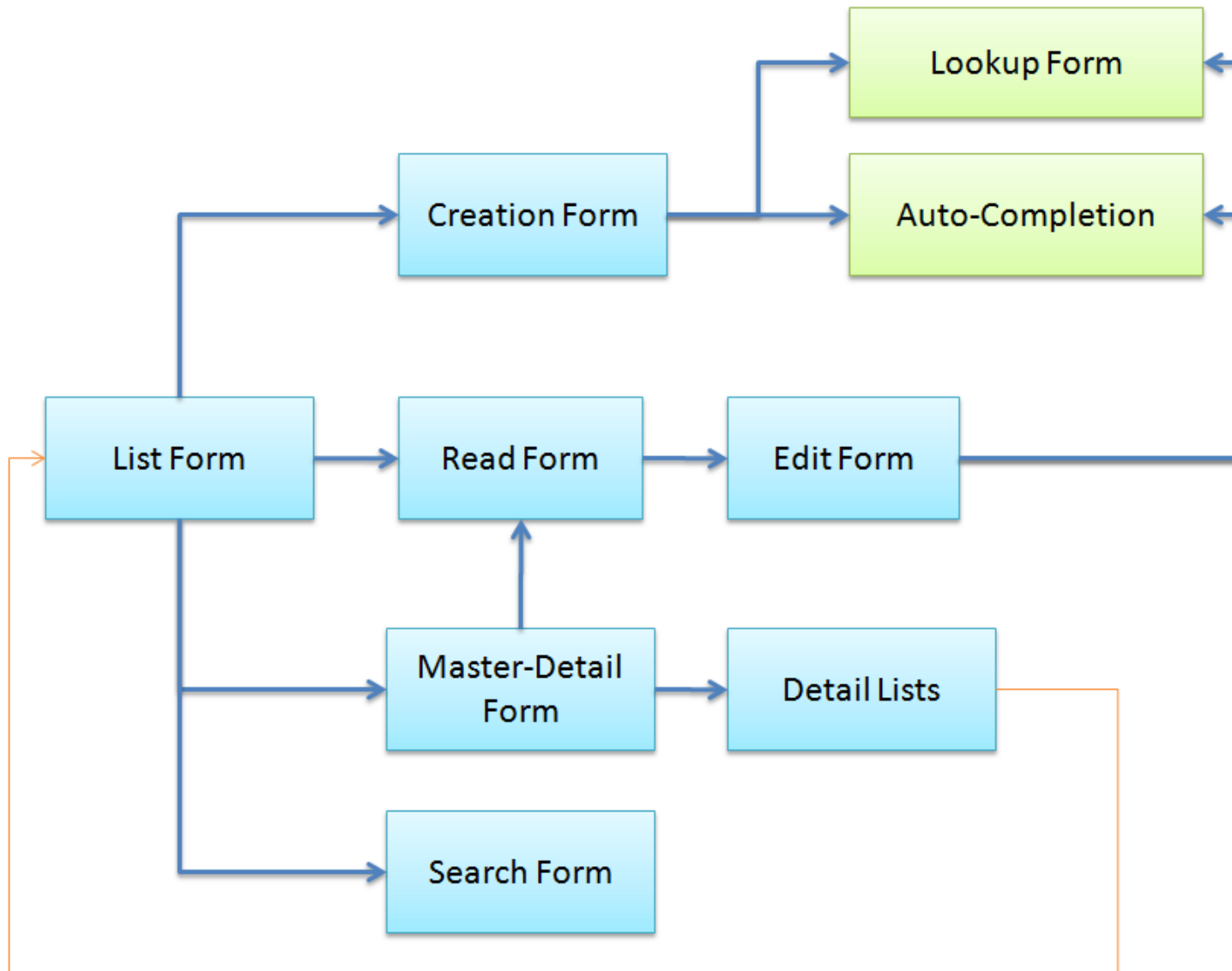
CalemEAM



Product Overview – Functions

CalemEAM





User Interface – List Row Search

CalemEAM

My assignment (89)													
<div><div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div><div>Print All</div><div>Get All</div><div></div><div></div><div></div><div>More</div><div>Customize</div></div>													
	#	Wo #	Flag	Asset Tag	Location	Status	Priority	PM?	Subject	Sched start	Need by	Site	Last modified
				401402									
<input type="checkbox"/>	1	143784		401402-17	B02.HQ	Approved	P4	<input checked="" type="checkbox"/>	PM_Weekly	7/23/18 12:00 P...	7/23/18 8:00 P...	MySite	7/23/18 9..
<input type="checkbox"/>	2	113910		401402-17	B02.HQ	Released	P4	<input checked="" type="checkbox"/>	PM_Weekly	10/3/16 12:00 P...	10/3/16 8:00 P...	MySite	7/20/18 7..
<input type="checkbox"/>	3	142162		401402-17	B02.HQ	In-process	P4	<input checked="" type="checkbox"/>	PM_Weekly	7/16/18 12:00 P...	7/16/18 8:00 P...	MySite	7/15/18 6..
<input type="checkbox"/>	4	113106		401402-17	B02.HQ	Approved	P4	<input checked="" type="checkbox"/>	PM_Weekly	9/12/16 8:00 PM...	9/12/16 8:00 P...	MySite	7/14/18 6..
<input type="checkbox"/>	5	113505		401402-17	B02.HQ	Approved	P4	<input checked="" type="checkbox"/>	PM_Weekly	9/19/16 8:00 PM...	9/19/16 8:00 P...	MySite	7/13/18 8..
<input type="checkbox"/>	6	113506		401402-17	B02.HQ	Approved	P4	<input checked="" type="checkbox"/>	PM_Weekly	9/26/16 8:00 PM...	9/26/16 8:00 P...	MySite	7/13/18 8..
<input type="checkbox"/>	7	113911		401402-17	B02.HQ	Approved	P4	<input checked="" type="checkbox"/>	PM_Weekly	10/10/16 12:00 ...	10/10/16 8:00 ...	MySite	7/13/18 8..
<input type="checkbox"/>	8	113912		401402-17	B02.HQ	Approved	P4	<input checked="" type="checkbox"/>	PM_Weekly	10/17/16 12:00 ...	10/17/16 8:00 ...	MySite	7/13/18 8..
<input type="checkbox"/>	9	114684		401402-17	B02.HQ	Approved	P4	<input checked="" type="checkbox"/>	PM_Weekly	10/24/16 12:00 ...	10/24/16 8:00 ...	MySite	7/13/18 8..
<input type="checkbox"/>	10	115131		401402-17	B02.HQ	Approved	P4	<input checked="" type="checkbox"/>	PM_Weekly	10/31/16 12:00 ...	10/31/16 8:00 ...	MySite	7/13/18 8..
<input type="checkbox"/>	11	115570		401402-17	B02.HQ	Approved	P4	<input checked="" type="checkbox"/>	PM_Weekly	11/7/16 12:00 P...	11/7/16 8:00 P...	MySite	7/13/18 8..
<input type="checkbox"/>	12	115825		401402-17	B02.HQ	Approved	P4	<input checked="" type="checkbox"/>	PM_Weekly	11/14/16 12:00 ...	11/14/16 8:00 ...	MySite	7/13/18 8..

- #1 – Efficient search – scalable to tens of thousands rows
- #2 – Right-Click list caption to add a field for search
- #3 – Hide by default

User Interface – List View

CalemEAM

The screenshot displays the CalemEAM User Interface in List View. At the top, a search bar is labeled '#1' and contains the text 'My assignment (20)'. Below the search bar is a toolbar with various icons, including a magnifying glass labeled '#3'. A dropdown menu is open, showing options like 'Approve', 'Release', 'In-process', 'Complete', 'Accept', 'Close WO', 'Edit', 'Plan Labor', and 'Assign/Schedule', labeled '#2'. The main table lists work orders with columns: #, Wo #, Flag, Asset #, Location, Status, Priority, Sched start, Need by, Site, and Last modified. Rows 7 and 8 are highlighted in yellow and have checkboxes selected. A green box highlights the 'More' dropdown menu and the selected rows, with the text 'Dropdown Menu for Checked Rows' next to it.

#	Wo #	Flag	Asset #	Location	Status	Priority	Sched start	Need by	Site	Last modified	
1	8722		200-001	B02.HQ	In-process	P1	10/1/13 9:00 AM...	1/1/10 12:00 A...	MySite	4/1/16 6:...	
2	76331		0911-2345	B02.HQ	Approved	P1	M job for 0911...	7/10/14 4:01 AM...	4/26/14 4:14 P...	MySite	2/5/16 2:...
3	4461		200-001	B02.HQ	In-process	P3	10/12/15 9:00 A...	7/5/09 12:00 A...	MySite	4/1/16 6:...	
4	82909		100HP-008	CA.Building2	Approved	P3	ed Plan	11/12/14 1:00 A...	11/12/14 1:00 A...	My TX site	2/22/16 6...
5	83256		100HP-008	CA.Building2	Approved	P3	ed Plan	12/10/14 1:00 A...	12/10/14 1:00 A...	My TX site	2/22/16 6...
6	84902		100HP-008	CA.Building2	Approved	P3	ed Plan	1/14/15 1:00 AM...	1/14/15 1:00 A...	My TX site	2/22/16 6...
7	90130		100HP-008	CA.Building2	Approved	P3	ed Plan	5/13/15 1:00 AM E...	5/13/15 1:00 AM E...	My TX site	2/22/16 6:1...
8	92850		100HP-008	CA.Building2	Approved	P3	ed Plan	7/8/15 1:00 AM Ea...	7/8/15 1:00 AM Ea...	My TX site	2/22/16 6:1...
9	94744		100HP-008	CA.Building2	Approved	P3	Test for 2nd wed Plan	8/12/15 1:00 AM...	8/12/15 1:00 A...	My TX site	2/22/16 6...
10	95497		100HP-008	CA.Building2	Approved	P3	Test for 2nd Wed Plan	9/9/15 1:00 AM ...	9/9/15 1:00 AM...	My TX site	2/22/16 6...
11	97308		100HP-008	CA.Building2	Approved	P3	Test for 2nd Wed Plan	10/14/15 1:00 A...	10/14/15 1:00 A...	My TX site	2/22/16 6...
12	98663		100HP-008	CA.Building2	Approved	P3	Test for 2nd Wed Plan	11/11/15 1:00 A...	11/11/15 1:00 A...	My TX site	2/22/16 6...

- #1 – Free Text Search and Advanced Search
- #2 – More Menu for List (multiple checked rows)
- #3 – Menu to Create, Delete, Refresh, Close, Print, etc.

User Interface – Creation/Edit View

CalemEAM

[My assignment List](#) > Create WO Create **Breadcrumb trail**

Create WO

Save Cancel Customize **"Save" is enabled when data is valid to save**

The field value for the lookup is not valid.: Asset # **Data validation indicator**

Priority: P4 **Review reqd?:** ☐

Category: Detective **Auto-Completion** **WO type:**

Asset #: Ad **Lookup button**

Location: JJ.CA.AC-001, Building, OH-CA-001

Failure: AC 2, JJ.100HP.2000, B02.HQ

Subject:

Description:

Parent wo #:

Origination

Origination: Other

Requester: Administrator **Contact:**

Time requested: 4/14/16 **At:** 5:12 PM Central **Need by:** **At:** Central

- Breadcrumb
- “Save” menu enable/disable
- Data validation indicator
- Lookup button and auto-completion

User Interface – Multi-Tab Main Tab

CalemEAM

Asset (6 of 4421)

Asset #: SP02-M-PORT **Note:** Mercury Console 2006

Asset group: [MERCURY.CONSOLE.2006](#) **Priority:** Critical **Read View**

Rebuildable?:	<input type="checkbox"/>	Status:	In service
Sub-category:		Category:	
Criticality:	C1	Criticality #:	75
Owner:		Owner site:	
Barcode:	SP02-M-PORT	Serial #:	
Parent asset:	AS-SHIP-01	Asset photo:	
Position:		Doc URL:	
Location:	CA.Building2	Site:	My TX site
Service site:		Company:	JJ-Chain
Model:		PO #:	
Store:		Locator:	
Meter 1:		Meter 2:	
Reading 1:		Reading 2:	
Warranty		Purchase date:	
Start date:		Warranty end:	
Warranty start:			

- Tabs
- Menu
- Data Read View

User Interface – Multi-Tab Detail Tab

CalemEAM

MainPartContractMeterDocumentDowntimePMChild AssetRelationTransactionCustomize

Asset (6 of 4421)

Main Data Row

Create SR

Create WO

More

Customize

Asset #:

SP02-M-PORT

Note:

Mercury Console 2006

Asset group:

MERCURY.CONSOLE.2006

Priority:

Critical

Asset Part (12)

List View 1

Customize

	Part	Qty	Uom	Stock type	Note	Site	Store	Locator	Qty in stock
<input type="checkbox"/>	1000-PUMP-SEA...	4	G	Stock	Pump seal	MySite_CA	CA.Store		3
<input type="checkbox"/>	1000-PUMP-SEA...	4	G	Stock	Pump seal	MySite	QA-Store		2
<input type="checkbox"/>	1000-PUMP-SEA...	4	G	Stock	Pump seal	MySite	MainStore	A1.S1	19

Asset Tool (0)

List View 2

Customize

	Tool	Qty	Uom	Stock type	Item	Note
No results found.						

- Main Data + Detail Data Lists

- Set up “Search admin” permission at “User” form
 - No Admin: saved search for personal use
 - Group Admin: saved search for same group use
 - System Admin: saved search for everyone

The screenshot displays the CalemEAM Advanced Search interface, divided into two main sections: 'My Search (0)' and 'Shared Search (8)'.

My Search (0): This section is currently empty, showing 'No results found.' It includes a search bar and a 'Customize' button.

Shared Search (8): This section displays a list of 8 shared searches. Each search entry has a checkbox, a search name, and a 'Custom Defaults' button. The searches are:

Search	Custom Defaults
<input type="checkbox"/> 01-New	<input type="checkbox"/>
<input type="checkbox"/> 02-Approved	<input type="checkbox"/>
<input type="checkbox"/> 03-Released InProgress OnHold	<input type="checkbox"/>
<input type="checkbox"/> 04-Completed	<input type="checkbox"/>
<input type="checkbox"/> 05-Closed	<input type="checkbox"/>
<input type="checkbox"/> 06-PMs	<input type="checkbox"/>
<input type="checkbox"/> 07-Non-PMs	<input type="checkbox"/>
<input type="checkbox"/> 08-Part Repair	<input type="checkbox"/>

- Create a service request
- Use lookup form to pick up an asset
- Search Asset in list row search
- Search SR in free text search
- Search SR in search form
- Launch “Open WO” and “Open SR” List Forms
 - Open a WO data record
 - Open an SR data record
 - Switch between SR and WO multi-tab forms
- Pin “Open WO” list to prevent it from being auto-closed
- Close all forms by a right-click menu on form tabs

Asset and
Location

Maintenance
Schedules

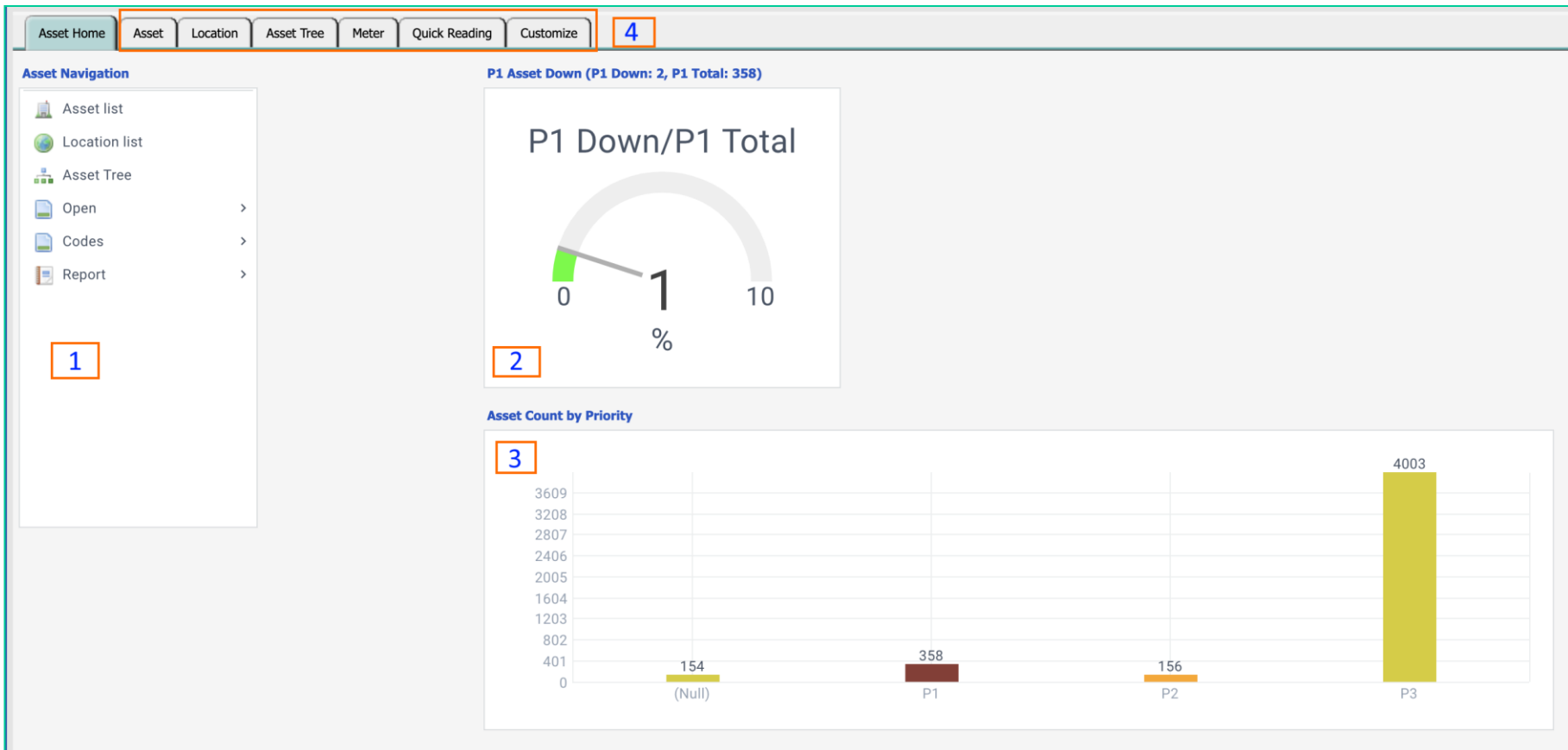
Contract and SLA

Work Order

Service Request

Change Management

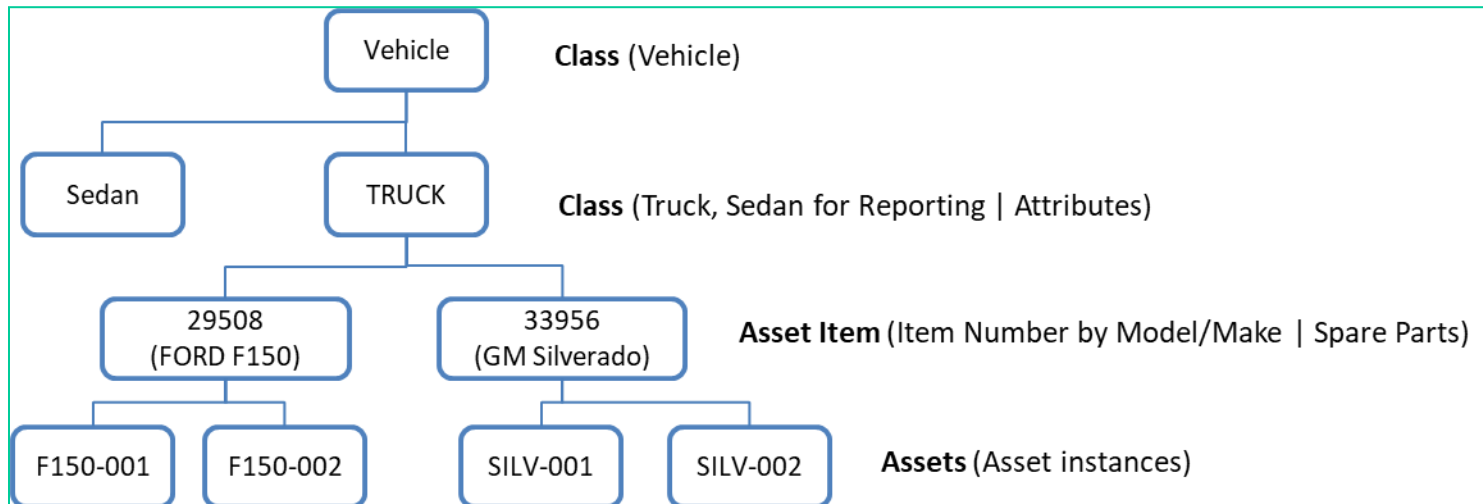
- Build Asset/Location Hierarchy
- Browse Asset/Location in Trees



Asset Module – Class & Item

CalemEAM

- Asset Class – grouping assets & locations
 - Reporting by Class
 - Attributes by Class
- Asset Item – identical assets by manufacturer model
 - Driven by Spare Parts
 - Assets of the same Asset Item sharing the same spare parts
 - Optional to implement



- Asset Class – grouping assets & locations
 - Asset | Open | Asset Class Tree
 - Organization | Codes | Class List
- Asset Item – identical assets by manufacturer model
 - Asset | Codes | Asset Item
 - Inventory | Items

- Asset Class
 - Define asset grouping hierarchy
 - Define asset specific attributes if needed (advanced topic):
<http://www.calemeam.com/calemcustomers-2/categorization-and-category-attributes>
- Asset Item – identical assets for spares/documents
 - Specify spares at asset items (not individual assets)
 - Upload manuals/pictures at asset items
 - <http://www.calemeam.com/calemcustomers-2/asset-part-usage-and-bill-of-material>

- Set up vendors and manufacturers
- Use Step 1 of the blog: <http://www.calemeam.com/calemcustomers-2/vendor-setup-for-inventory>
- Define “Class”, “Model”, and “Manufacturer” at “Asset Item”
 - They are copied to asset when asset item is set.

- Locations are physical places where assets are deployed
- Locations are required to create assets
- Location hierarchy can be defined to group locations
 - For example:
 - A facility can have buildings
 - A building can have floors
 - A floor can have rooms
 - Assets can be deployed at any location

Asset Module - Location

CalemEAM

- Class – asset location or configuration element (CE)
 - Use Location as CE to store asset configuration parameters
 - Use CE when assets are portable and replaced
- Location Group – locations share same spare parts
- Use “Parent” to define location hierarchy

[Location list List](#) > Location Create

Location

Save Cancel Customize

Value is required: Location

Location:	<input type="text"/>	Note:	<input type="text"/>
Site:	<input type="text"/>	Parent:	<input type="text"/>
Service site:	<input type="text"/>	Categorization:	<input type="text"/>
Status:	<input type="text" value="In Service"/>	Loc group:	<input type="text"/>
Priority:	<input type="text"/>	Photo:	<input type="text"/>
Owner:	<input type="text"/>	Owner Group:	<input type="text"/>
Inventory?:	<input type="checkbox"/>		

Warranty

Start date:	<input type="text"/>		Purchase date:	<input type="text"/>	
Warranty start:	<input type="text"/>		Warranty end:	<input type="text"/>	

Asset Module – Upload Location

CalemEAM









- Prepare location list in Excel Templates (available from Calem)
- Upload excel file to Calem (Integration | Data Upload)

Site (site_id__site)	Location (location)	Note (note)	Loc group (type_id__type)	Owner user (owner_user_id__full_name)	Dept (dept_id__dept)	Description (d
MySite	10 - ServerRoom	Server room 10	IT			

Asset Module – Location Form

CalemEAM

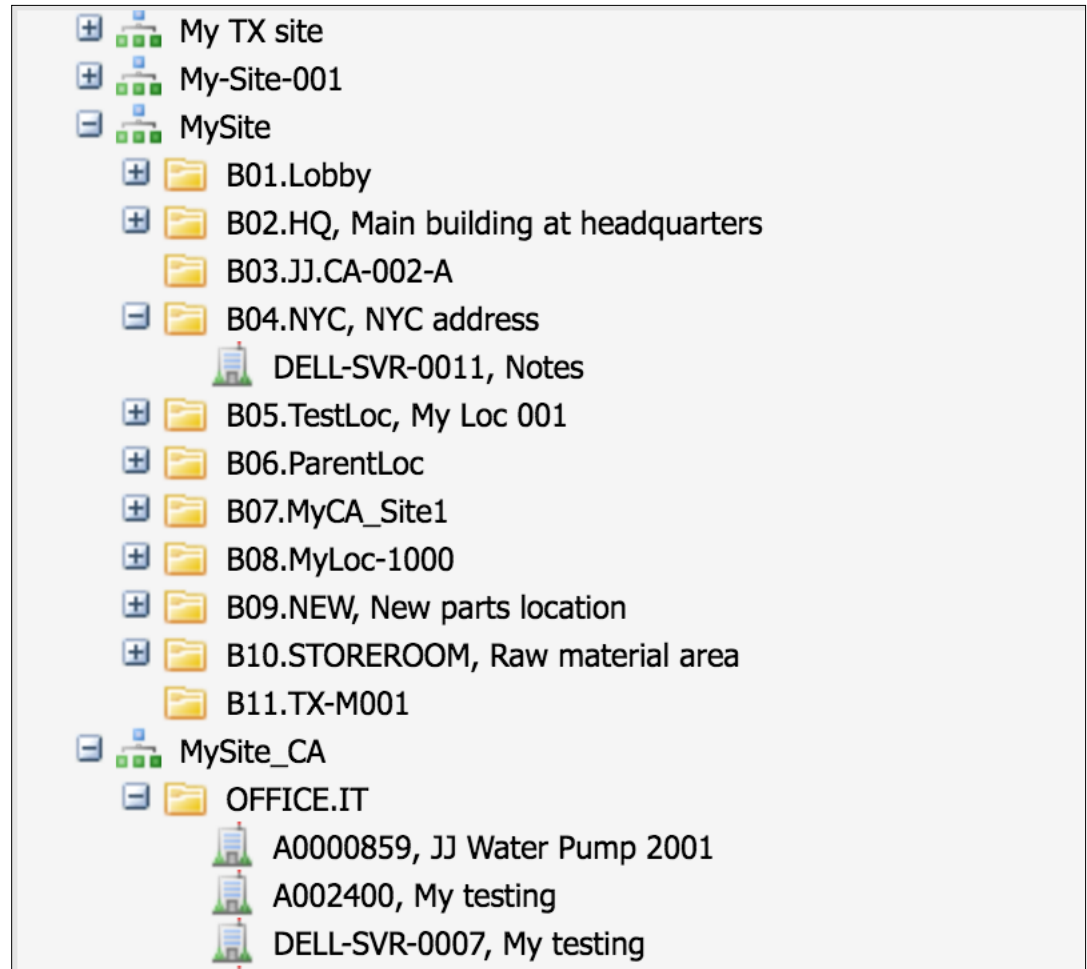
- A location can have: Assets, PMs, Meters
- A location can be under contracts
- A location can have docs and file attachments

Location Main		Asset		Document		Contract		PM		Meter		Customize	
Location (1 of 70)													
     Status log  Activity log  Changes (MOC)  Customize													
Location:		B01.Lobby						Note:					
Site:		MySite						Parent:					
Service site:													
Company:		CalemEAM Inc.						Loc group:		Workshop			
Status:		In service						Loc category:					
Priority:		Critical						Photo:					
Owner:		Jason Bennett						Owner site:		MySite			
Inventory?:		<input type="checkbox"/>						Code:					
Warranty													
Start date:								Purchase date:					
Warranty start:								Warranty end:					
Maint. Cost													
Labor hrs:								Material cost (USD):					
Labor cost (USD):								Maint. cost (USD):					
Codes													
Cost center:								Dept:					
Account:													

Asset Module – Location Tree

CalemEAM

- Site, Location, Asset hierarchy
- Location and Child locations
- Assets and Child assets



- Asset Class Hierarchy

Root

- BLD.WAREHOUSE
 - COMPRESSOR.100HP
 - CRC
 - HW-Linux
 - LinuxClone**
 - Lay2Switch
- M-560
 - MC
 - MOC
 - My-cat3
 - MyCat.001
- Network Device
 - PC
 - Resource
 - Resources
 - Truck
 - Vehicle
 - _ASSEMBLY
 - _BLD.PROD
 - _Cutting
 - _PUMP.WATER
 - my-cat-3-test

Main

Asset

Location

Customize

Categorization (1 of 4)

Customize

Categorization:

Full Path:

Asset (7)

Assets

Asset Report

Form design

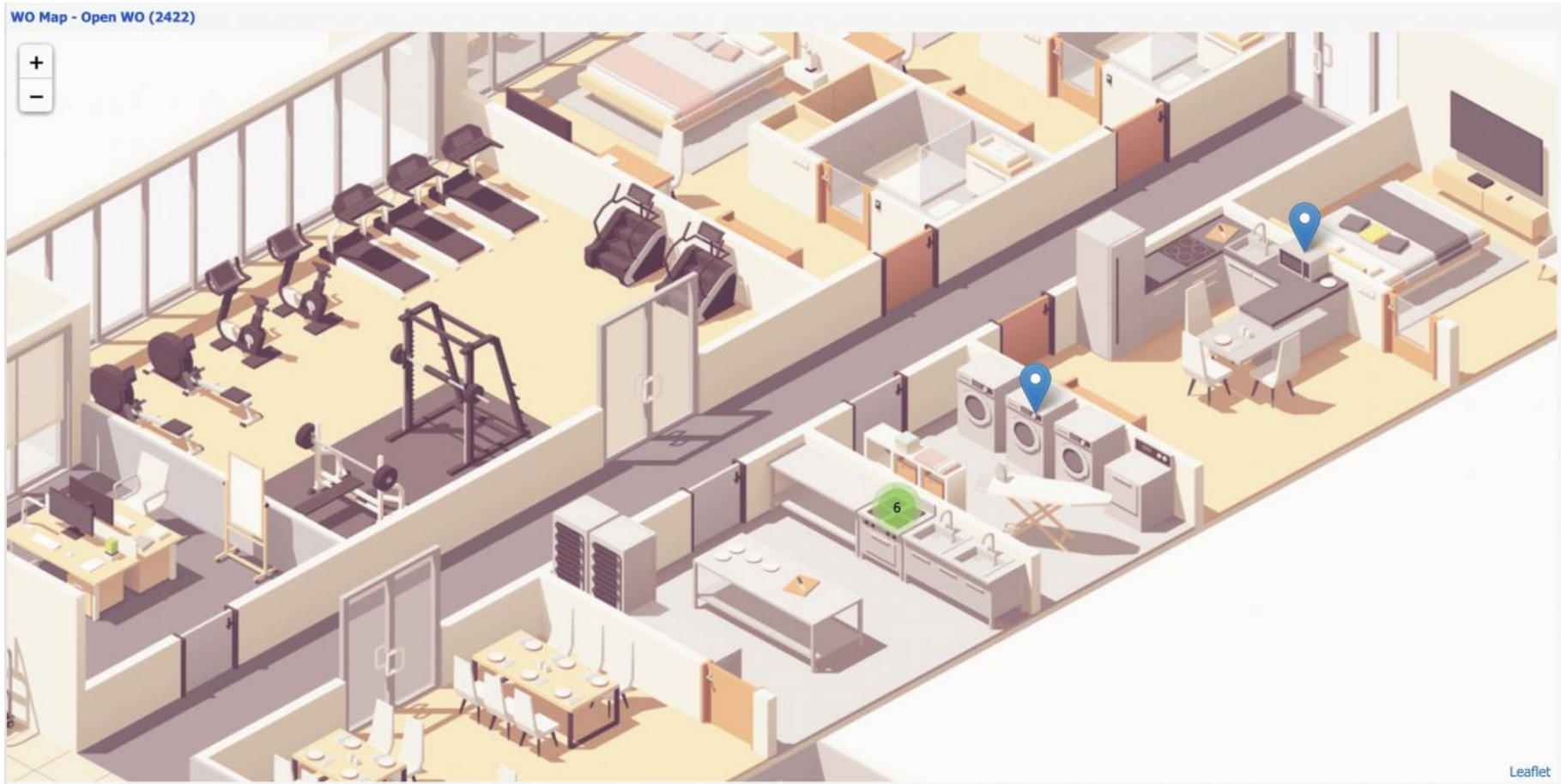
Customize

| # | Asset Tag | Asset Item | Status | Location | Owner Group | Last modified |
|---|--------------|----------------|--------------|-----------|-------------|--------------------|
| 1 | 100HP-004 | JJ.100HP.2000 | Down | B02.HQ | | 9/18/19 1:19 PM... |
| 2 | 100HP-005 | JJ.100HP.2000 | In-Service | B02.HQ | | 9/18/19 1:19 PM... |
| 3 | 100HP-008 | JJ.100HP.2000 | Not-In-Se... | B09.NEW | | 9/18/19 1:19 PM... |
| 4 | 100HP-008-C1 | JJ.100HP.2000 | In-Service | B09.NEW | | 9/13/19 3:15 PM... |
| 5 | A0000650 | 1000-PUMP-SEAL | In-Service | B02.HQ | | 9/18/19 1:19 PM... |
| 6 | forum_2 | | In-Service | JJ.CA-002 | | 9/18/19 1:19 PM... |
| 7 | LINUX-001 | Asset-Item-001 | In-Service | B09.NEW | | 9/5/19 3:44 PM ... |

Product – Asset Floor Plan View

CalemEAM

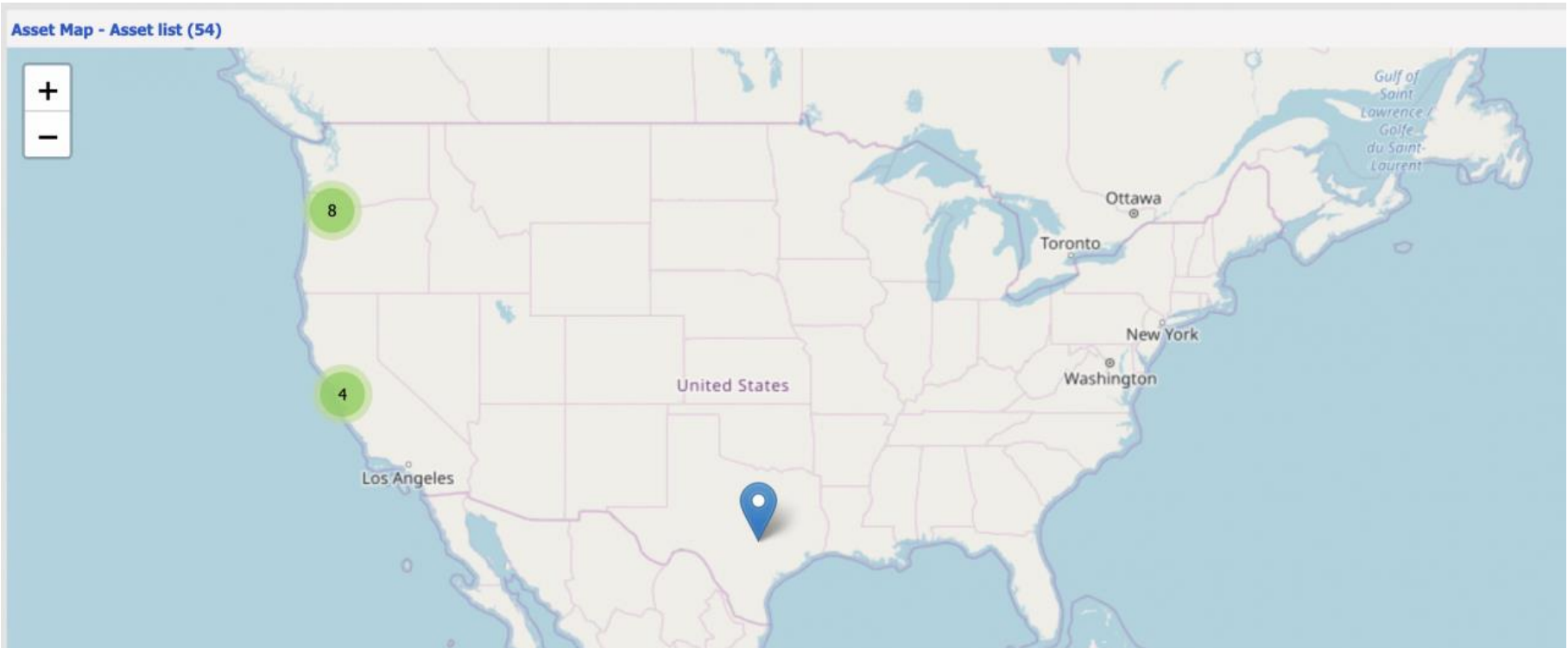
- View Assets and Locations in Floor Plan Images



Product – Asset Map View

CalemEAM

- View Assets and Locations in Maps



Asset Module – Create Asset

CalemEAM

[Asset list List](#) > Asset Create

Asset

Save Cancel Customize

The field value for the lookup is not valid.: Location

| | | | |
|------------------------------|----------------------|-----------------------|----------------------|
| Asset Tag: | <input type="text"/> | Note: | <input type="text"/> |
| Location: | <input type="text"/> | Service site: | <input type="text"/> |
| Priority: | P2 (Production) | Status: | In Service |
| Asset group: | <input type="text"/> | Barcode: | <input type="text"/> |
| Categorization: | <input type="text"/> | Parent asset: | <input type="text"/> |
| Serial # (free form): | <input type="text"/> | PO #: | <input type="text"/> |
| Model: | <input type="text"/> | Asset photo: | <input type="text"/> |
| Owner: | <input type="text"/> | Owner Group: | <input type="text"/> |
| Warranty | | | |
| Start date: | <input type="text"/> | Purchase date: | <input type="text"/> |
| Warranty start: | <input type="text"/> | Warranty end: | <input type="text"/> |
| Vendor site: | <input type="text"/> | | |
| Manufacturer site: | <input type="text"/> | | |

- Asset Tag - leave blank for auto-numbering
- Define “Note”, “Location”, “Serial #”, “Class”, “Model”, and “Manufacturer”
 - Define “Class”, “Model”, and “Manufacturer” at “Asset Item” if implemented




Asset Module – Upload Asset


CalemEAM



- Prepare asset list in Excel Templates (available from Calem)
- Upload excel file to Calem (Integration | Data Upload)

| Asset Group (in_id__in_no) | Model No (model_no) | Note (note) | SERIAL NO (serial_no) | Asset no (asset_no) | Location (location_id__loc) | Manufacturer (manufacturer_ |
|----------------------------|---------------------|-------------|-----------------------|---------------------|-----------------------------|-----------------------------|
| CRC-UNIT | GG199A-C10 | GG199A-C10 | 400848-011 | CRU-6 | 10-PROD | ACME |
| | | | | | | |
| | | | | | | |
| | | | | | | |

Data Upload

 Save  Cancel  Customize

 Ready to save changes.

File:   No file chosen

Note:

Asset Module – Asset Parts

CalemEAM

- Asset Spares can be defined per asset
- If implemented Asset Spares can be defined at Asset Items
- Spares and their availability are displayed
- Asset Part report at: Asset | Report | Asset Parts

MainPartContractMeterDocumentDowntimePMChild AssetRelationTransactionCustomize

Asset (10 of 4421)

Create SR Create WO

More Customize

Asset #: Note:
Asset group: Priority:

Asset Part (9)

Customize

| <input type="checkbox"/> | Part | Qty | Uom | Stock type | Note | Site | Store | Locator | Qty in stock |
|--------------------------|------------------|-----|-----|------------|--------------------|--------|-----------|---------|--------------|
| <input type="checkbox"/> | JJ.WATER-PUMP... | 4 | | | JJ Water Pump 2001 | MySite | QA-Store | | 1 |
| <input type="checkbox"/> | JJ.WATER-PUMP... | 4 | | | JJ Water Pump 2001 | MySite | MainStore | | 1 |
| <input type="checkbox"/> | JJ.WATER-PUMP... | 4 | | | JJ Water Pump 2001 | MySite | MainStore | | 6 |









Asset Module – Contract & Depreciation

CalemEAM

- Contracts for the asset if applicable
- Depreciation attributes at asset

MainPartContractMeterDocumentDowntimePMChild AssetRelationTransactionCustomize





Asset (1 of 1)

 Create SR Create WO More Customize

Asset #: Note:

Asset group: Priority:

Contract (1)

 Customize

| <input type="checkbox"/> | Contract | Note | Status | Start date | End date | Last modified |
|--------------------------|----------|------|--------|------------|----------|--------------------|
| <input type="checkbox"/> | MC-001 | | Valid | | | 4/15/16 7:43 PM C. |

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


Asset Module – Meter & Trigger

CalemEAM

- Meters attached to the asset or location
- Trigger events for the meters


MainPartContract**Meter**DocumentDowntimePMChild AssetRelationTransactionCustomize







Asset (1 of 1)

 Create SR Create WO More Customize


Asset #: Note:



Asset group: Priority:

**Asset Meter (0)**

 Readings Add reading Customize

| <input type="checkbox"/> | Meter # | Reading | Time taken | Note | Reading type |
|--------------------------|---------|---------|------------|------|--------------|
| No results found. | | | | | |

**Meter Events (0)**

 Customize

| Event | Meter # | Trigger | Reading | Time created |
|-------|---------|---------|---------|--------------|
|-------|---------|---------|---------|--------------|

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Asset Module – Doc & Attachment

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- Docs are linked to its Asset Group
- Attachments are specific to the asset

MainPartContractMeterDocumentDowntimePMChild AssetRelationTransactionCustomize

Asset (1 of 1)

Create SR

Create WO

More

Customize

Asset #:

A004669

Note:

Asset group:

ITM-001

Priority:

Critical

Group doc (0)

Customize

| Seq | Document | Note | Item | Last modified |
|-------------------|----------|------|------|---------------|
| No results found. | | | | |

Attachment (0)

View file

Download All

Customize

| File | Note | Last modified |
|-------------------|------|---------------|
| No results found. | | |

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Asset Module – Downtime & Comment



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- History of asset downtime
- History of comments


MainPartContractMeterDocumentDowntimePMChild AssetRelationTransactionCustomize


Asset (1 of 1)






 Create SR

 Create WO



 More


 Customize

Asset #: Note:

Asset group: Priority:



Asset Downtime (0)




 Customize

| <input type="checkbox"/> | Start time | End time | Total hrs | Total mins | Note | Last modified |
|--------------------------|------------|----------|-----------|------------|------|---------------|
| No results found. | | | | | | |

Comment (0)



 Customize

| <input type="checkbox"/> | Comment | Last modified |
|--------------------------|---------|---------------|
|--------------------------|---------|---------------|

Asset Module – PMs

CalemEAM

- **PMs defined for the asset**

| | | | | | | | | | | |
|------|------|----------|-------|----------|----------|----|-------------|----------|-------------|-----------|
| Main | Part | Contract | Meter | Document | Downtime | PM | Child Asset | Relation | Transaction | Customize |
|------|------|----------|-------|----------|----------|----|-------------|----------|-------------|-----------|

Asset (1 of 1)

Create SR
 Create WO

More ▼
 Customize

Asset #: •

Note:

Asset group: • [ITM-001](#)

Priority:

PM (0)

Customize

| # | PM # | Plan # | Subject | Status | PM code | PM Sched | Next due | Last released | Last done | Site | Last modified |
|-------------------|------|--------|---------|--------|---------|----------|----------|---------------|-----------|------|---------------|
| No results found. | | | | | | | | | | | |






Asset Module – Child Assets

CalemEAM

- Child assets

MainPartContractMeterDocumentDowntimePMChild AssetRelationTransactionCustomize

Asset (2 of 4421)



Create SR

Create WO



More

Customize

Asset #: SHIP-TEST-001Note: Ship test

Asset group: AS-SHIP-2350Priority: Critical

Child asset (10)



Customize

| # | Asset # | Note | Location | Site | Status | Asset group | Owner | Last modified |
|---|--------------|---------------------------------|--------------|------------|------------|--------------------|-------|------------------|
| 1 | MySite-00495 | Mercury Console 2006 | CA.Building2 | My TX site | In service | MERCURY.CONSOLE.. | | 8/21/14 10:36... |
| 2 | MySite-00493 | Mercury Console 2006 | CA.Building2 | My TX site | In service | MERCURY.CONSOLE.. | | 8/21/14 10:36... |
| 3 | MySite-00497 | Production system of Mercury... | CA.Building2 | My TX site | In service | MERCURY-PROD.200.. | | 4/13/16 1:19 P.. |
| 4 | MySite-00490 | Mercury Console 2006 | CA.Building2 | My TX site | In service | MERCURY.CONSOLE.. | | 8/21/14 10:36... |
| 5 | MySite-00498 | Production system of Mercury... | CA.Building2 | My TX site | In service | MERCURY-PROD.200.. | | 4/13/16 1:19 P.. |
| 6 | MySite-00492 | Mercury Console 2006 | CA.Building2 | My TX site | In service | MERCURY.CONSOLE.. | | 8/21/14 10:36... |
| 7 | MySite-00494 | Mercury Console 2006 | CA.Building2 | My TX site | In service | MERCURY.CONSOLE.. | | 8/21/14 10:36... |
| 8 | MySite-00496 | Mercury Console 2006 | CA.Building2 | My TX site | In service | MERCURY.CONSOLE.. | | 8/21/14 10:36... |
| 9 | MySite-00489 | Mercury Console 2006 | CA.Building2 | My TX site | In service | MERCURY.CONSOLE.. | | 8/21/14 10:36... |

Latitude and Longitude for Asset and Location

- See blog: <http://www.calemeam.com/calemcustomers-2/how-to-implement-geolocation-in-calem>









Asset Module – Asset Transactions


CalemEAM


- Asset move tracking

| | | | | | | | | | | |
|------|------|----------|-------|----------|----------|----|-------------|----------|-------------|-----------|
| Main | Part | Contract | Meter | Document | Downtime | PM | Child Asset | Relation | Transaction | Customize |
|------|------|----------|-------|----------|----------|----|-------------|----------|-------------|-----------|



Asset (2 of 4421)

     Create SR  Create WO  More  Customize

Asset #:  SHIP-TEST-001 **Note:** Ship test

Asset group:  [AS-SHIP-2350](#) **Priority:** Critical

Asset Tran. (2)

  Customize

| Tran # | Type | Asset # | To location | To site | Shipper | Tracking # | RMA | Last modified |
|---------|-------------------|---------------|--------------|---------|---------|------------|-----|------------------|
| T000025 | Send for repair | SHIP-TEST-001 | | FARADAY | | | | 7/13/14 4:53 P.. |
| T000026 | Receive repair... | SHIP-TEST-001 | CA.Building2 | MySite | Abco | | | 7/13/14 4:55 P.. |








Asset Module – Asset Activity Log

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- Activity Log – Work orders performed on the asset
 - Open WO – show WOs not completed
 - No Child – exclude activity logs of child assets
 - Show All - show all WO and include activity logs of child assets

[Asset](#) > Activity log List

Activity log (64)

    Show All  No Child  Open WO  Customize

| # | Wo # | Priority | Status ▾ | Resolution | Total (USD) | Subject | Last completed | Asset # | Location |
|---|--------|----------|-------------|------------|-------------|--------------------------------|----------------------|------------------|--------------|
| 1 | 98606 | P1 | Released | | | test | | SHIP-TEST-001... | CA.Building2 |
| 2 | 85712 | P4 | New | | | test | | SHIP-TEST-001... | CA.Building2 |
| 3 | 85711 | P4 | New | | | test | | SHIP-TEST-001... | CA.Building2 |
| 4 | 85710 | P4 | New | | | test | | SHIP-TEST-001... | CA.Building2 |
| 5 | 103542 | P4 | New | | | My testing it | | SHIP-TEST-001... | CA.Building2 |
| 6 | 97604 | P3 | New | | | Monthly 4th Monday maintena... | | SHIP-TEST-001... | CA.Building2 |
| 7 | 74012 | P4 | New | | | My WO test | | SHIP-TEST-001... | CA.Building2 |
| 8 | 95057 | P2 | In-proce... | | | Monthly 4th Monday maintena... | 8/23/15 7:27 PM E... | SHIP-TEST-001... | CA.Building2 |
| 9 | 31981 | P3 | Closed | | (463.4974) | PM Plan from PMProcedures | 7/28/14 9:13 AM E... | SHIP-TEST-001... | CA.Building2 |




Asset Module – Asset Status Log

CalemEAM

- Asset status changes

[Asset](#) > Status log List

Status log (10)

   Customize




| From status | To status | Prev. owner | New owner | Changed by | Time created |
|----------------|----------------|--------------|--------------|---------------|----------------------|
| In repair | In service | Calem Test-A | Calem Test-A | | 8/21/14 3:24 PM C.. |
| In repair | In service | Calem Test-A | Calem Test-A | Calem Eam | 8/21/14 3:24 PM C.. |
| In repair | In repair | Dan | Calem Test-A | Calem Eam | 8/21/14 1:24 PM C.. |
| In service | In repair | Dan | Dan | Calem Eam | 8/21/14 10:37 AM ... |
| In service | In repair | Dan | Dan | Calem Eam | 8/21/14 10:37 AM ... |
| Offsite repair | In service | Dan | Dan | Administrator | 7/13/14 4:55 PM C.. |
| Offsite repair | In service | | | Administrator | 7/13/14 4:55 PM C.. |
| In service | Offsite repair | Dan | Dan | Administrator | 7/13/14 4:53 PM C.. |
| In service | Offsite repair | | | Administrator | 7/13/14 4:53 PM C.. |
| In service | In service | | Dan | Administrator | 6/14/14 3:06 PM C.. |


Asset Module – Asset Status Report



CalemEAM



- Activity Status Report
 - Meters and readings
 - PM schedules
 - Work orders
 - Parts usage
 - Service requests
 - Include child assets by default



Asset Status

 Save  Cancel  Customize

 Ready to save changes.

Start date:  

End date:  

Asset #:  

Exclude Children?: ☐

- Activity Log – work orders at a location
- Status Log – status changes
- Location Status Report – a summary reports of meters, PMs, work orders, service requests and material used.




Asset Module – Meter Group


CalemEAM


- Meter Group - same reading types, validation and triggers
- Reading Type
 - Usage (e.g. trip meter; to drive maintenance schedules)
 - Absolute (e.g. odometer; to drive maintenance schedules)
 - Gauge (e.g. temperature; to drive meter triggers)
 - Level (e.g. oil level; to drive usage meters)

[Meter groups List](#) > Meter group Create

Meter group


 Save  Cancel  Customize

 Value is required: Meter group

Meter group: 

Note:

Reading type:

UOM: 

Pattern:

Sequence:

Validate reading:

Range type:

Low:

High:




Asset Module – Meter Trigger


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- Meter Triggers
 - Creating work orders
 - <http://eam.calemeam.com/index.php/calemcustomers-2/meter-triggered-work-orders>


[Meter group](#) > Meter trigger Create

Meter trigger

 Save  Cancel  Customize

 Value is required: Trigger

Trigger: 

Asset group: 

Range type:

Low:

High:

Note:

Asset Module – Meter Reading Report

CalemEAM

- Readings for a given time period
- Export to excel for trending analysis

The screenshot shows a dialog box titled "Meter Readings". At the top, there are three buttons: "Save" (with a floppy disk icon), "Cancel" (with a close icon), and "Customize" (with a notepad icon). Below the buttons, a red error message with a flag icon reads "Value is required: Tran. start". Underneath the error message, there are two input fields. The first is labeled "Tran. start:" and is followed by a small purple circle icon, a red flag icon, and a yellow rectangular input field. To the right of the yellow field is a calendar icon showing the month of December. The second input field is labeled "Tran. end:" and is followed by a white rectangular input field and a calendar icon showing the month of December.




Asset Module – Meter Readings


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- Asset Meter Form
 - Add readings
 - Batch upload meter readings
 - <http://eam.calemeam.com/index.php/calemcustomers-2/scheduled-upload-of-meter-readings>

[Asset](#) > Meter reading Create


Meter reading


 Save  Cancel  Customize

 Value is required: Reading

Reading:  No readings recorded.

Note:

Read by: 

Time taken:  At:

Calib. phase:

Is rollover: ☐ **Rollover count:**

Hands-on

- Create a Class tree
- Create an Asset Item
- Create a Location Group
- Create a Location with Class and location group
- Create an Asset with Class and asset item
- Create a Meter Group
- Create a meter
- Add meter readings
- Asset Status Report
- Location Status Report
- Prepare locations in Location Excel Template
- Prepare Assets in Asset Excel Template

Next Module – Preventive Maintenance

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- We will cover Maintenance Schedules in next session.

Asset and
Location

Maintenance
Schedules

Contract and SLA

Work Order

Service Request

Change Management



Optional – Asset Relationship





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- Define the relationship at Class
- Define the relationship at asset level
- Use the relationship to analyze asset dependencies


MainPartContractMeterDocumentDowntimePMChild AssetRelationTransactionCustomize


Asset (10 of 4421)







 Create SR Create WO

 More  Customize

Asset #:  MySite-05617Note: Auto-generated serial no.

Asset group:  [MERCURY-PROD.2006](#)Priority: Critical

Relation (5)

 Customize

| <input type="checkbox"/> | # | Asset # | Relation | To Asset # | Last modified |
|--------------------------|---|--------------|----------|------------|---------------------|
| <input type="checkbox"/> | 1 | MySite-05617 | Manages | 5017 | 4/7/16 9:12 AM C... |
| <input type="checkbox"/> | 2 | MySite-05617 | Supports | 4984 | 3/31/16 6:43 AM ... |
| <input type="checkbox"/> | 3 | MySite-05617 | Supports | 4983 | 3/31/16 6:43 AM ... |
| <input type="checkbox"/> | 4 | MySite-05617 | Manages | 5015 | 4/7/16 9:12 AM C... |
| <input type="checkbox"/> | 5 | MySite-05617 | Manages | 5016 | 4/7/16 9:12 AM C... |

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Optional – Asset Structure

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- Asset Structure Component Template (ASC)
 - Model an asset with a hierarchy of child assets and meters
 - E.g.: a ship with 3 engines, 3 gear boxes, 30 meters
 - Define an asset structure for the ship
 - Simplify the creation of a ship asset – all child assets/meters are created.

The screenshot shows the 'Asset Structure Component Template (ASC)' interface. At the top, there is a tabbed navigation bar with five tabs: 'Main' (selected), 'Asset SC', 'Meter SC', 'Asset/Meter', and 'Customize'. Below the tabs, the title 'Asset structure (1 of 1)' is displayed. Underneath the title, there is a toolbar with five icons: a document with a pencil, an upward arrow, a downward arrow, a close button (X), and a 'Customize' button with a document and pencil icon. Below the toolbar, there are two input fields. The first is labeled 'Asset SC:' and contains the text 'AS-SHIP-V2'. The second is labeled 'Note:' and contains the text 'Cloned from AS-SHIP'.

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