

# Part 2.4: Maintenance Functions – Service Request

Calem Enterprise Training

Summer 2022

Austin, Texas



## Goals

I know how to evaluate if SR should be implemented

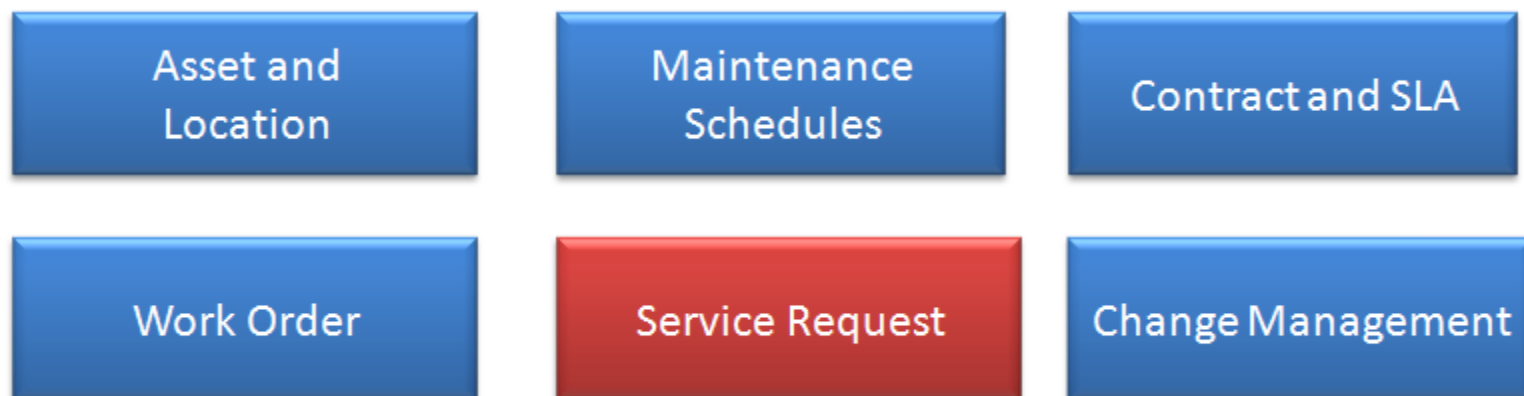
I know how to evaluate what options to use for SR submission

I know what roles to set up for my organization

I know how to set up SR life-cycle status permission

I know what SR SLAs are available

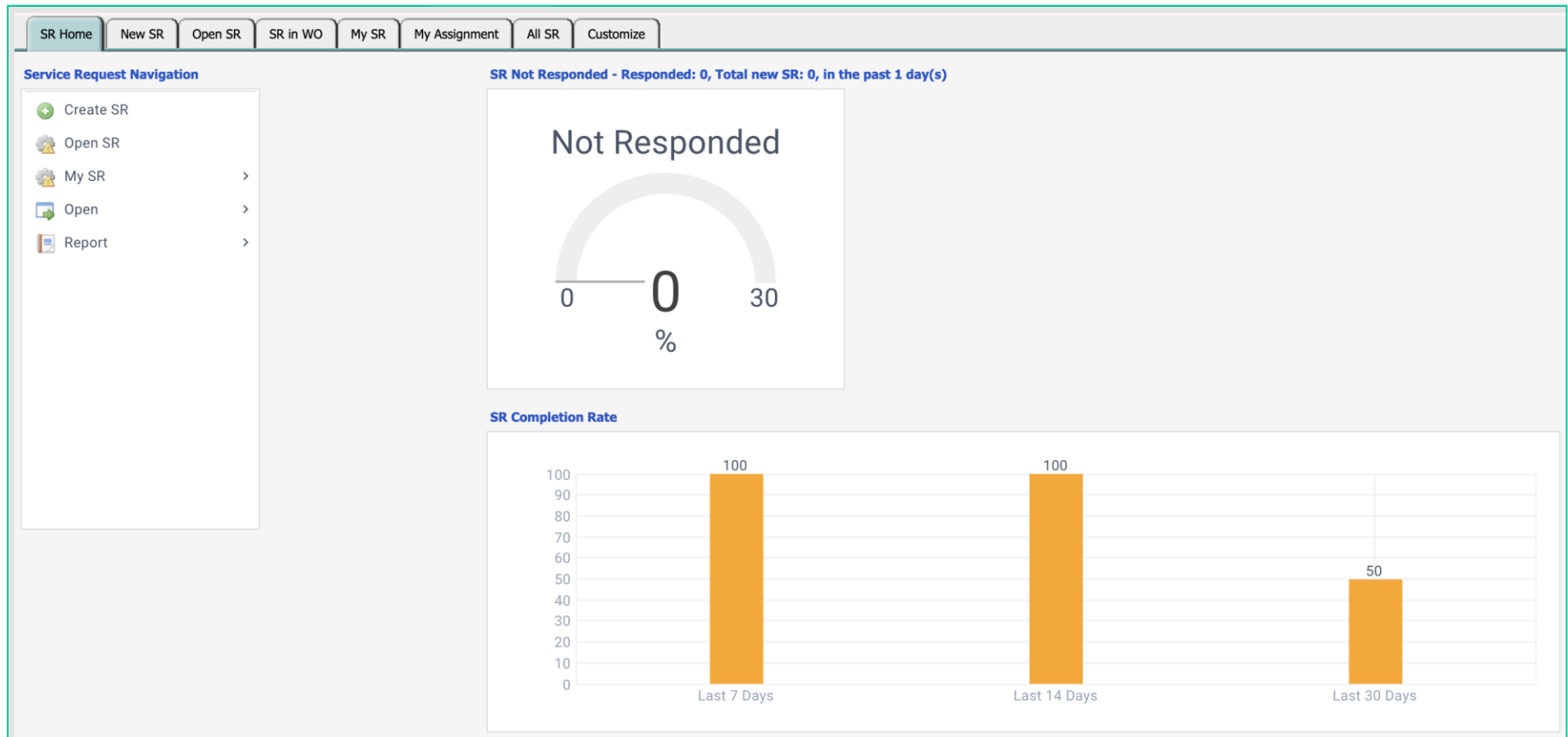
I know how to turn an SR to a work order



# Product – Service Request Module

CalemEAM







- Issues are reported as service requests by operators



# Product – Service Request Module

CalemEAM

- Have operators report issues
- Review service requests and turn into work orders

<input type="text"/> Instant Off  <b>Open SR/WO Lookup (64)</b>											
     Customize											
#	SR #	Wo #	WO Status	WO priority	Asset Tag	Location	Status	Priority	Subject	Time requested	Last modified
1	12895	<a href="#">216990</a>	Approved	P3	<a href="#">01-0001-0</a>	<a href="#">B09.NEW</a>	On WO	P3	test	9/10/20 5:17 PM C...	10/8/20 2:13 P...
2	12886	<a href="#">215395</a>	Approved	P1	<a href="#">TST-001</a>	<a href="#">10-PROD</a>	On WO	P1	TEST	9/9/20 4:19 PM Ce...	9/9/20 4:19 PM...
3	12885	<a href="#">215394</a>	Approved	P1	<a href="#">1000-A</a>	<a href="#">B09.NEW</a>	On WO	P1	test	9/9/20 4:18 PM Ce...	9/9/20 4:18 PM...
4	12884	<a href="#">FD-0202</a>	Approved	P3	<a href="#">5000</a>	<a href="#">FARADAY</a>	On WO	P3	T-11:38am	9/9/20 11:38 AM ...	9/9/20 11:38 A...
5	12457	<a href="#">211866</a>	Approved	P1	<a href="#">100HP-004</a>	<a href="#">B02.HQ</a>	On WO	P5	test	8/13/20 9:09 PM C...	12/4/20 10:07 ...
6	11448	<a href="#">203638</a>	Approved	P2	<a href="#">100HP-004</a>	<a href="#">B02.HQ</a>	On WO	P1	test p1-01	5/29/20 12:04 PM ...	12/4/20 10:07 ...
7	11342	<a href="#">202525</a>	Approved	P1	<a href="#">100HP-10-01</a>	<a href="#">B05.TestLoc</a>	On WO	P1	test	5/7/20 2:50 PM Ce...	12/4/20 10:07 ...
8	11342	<a href="#">202527</a>	Approved	P1	<a href="#">100HP-10-01</a>	<a href="#">B05.TestLoc</a>	On WO	P1	test	5/7/20 2:50 PM Ce...	12/4/20 10:07 ...
9	11342	<a href="#">202528</a>	Approved	P1	<a href="#">100HP-10-01</a>	<a href="#">B05.TestLoc</a>	On WO	P1	test	5/7/20 2:50 PM Ce...	12/4/20 10:07 ...
10	11342	<a href="#">202526</a>	Approved	P1	<a href="#">100HP-10-01</a>	<a href="#">B05.TestLoc</a>	On WO	P1	test	5/7/20 2:50 PM Ce...	12/4/20 10:07 ...
11	11342	<a href="#">202530</a>	Approved	P1	<a href="#">100HP-10-01</a>	<a href="#">B05.TestLoc</a>	On WO	P1	test	5/7/20 2:50 PM Ce...	12/4/20 10:07 ...
12	11342	<a href="#">202529</a>	Approved	P1	<a href="#">100HP-10-01</a>	<a href="#">B05.TestLoc</a>	On WO	P1	test	5/7/20 2:50 PM Ce...	12/4/20 10:07 ...
13	11341	<a href="#">208731</a>	Approved	P1	<a href="#">100HP-011</a>	<a href="#">CA.BuildingMain-02</a>	On WO	P1	test	5/7/20 2:37 PM Ce...	12/4/20 10:07 ...
14	11340	<a href="#">202523</a>	Approved	P1	<a href="#">1000</a>	<a href="#">B09.NEW</a>	On WO	P1	testing it	5/7/20 2:16 PM Ce...	12/4/20 10:07 ...

# Service Request – When to Use SR

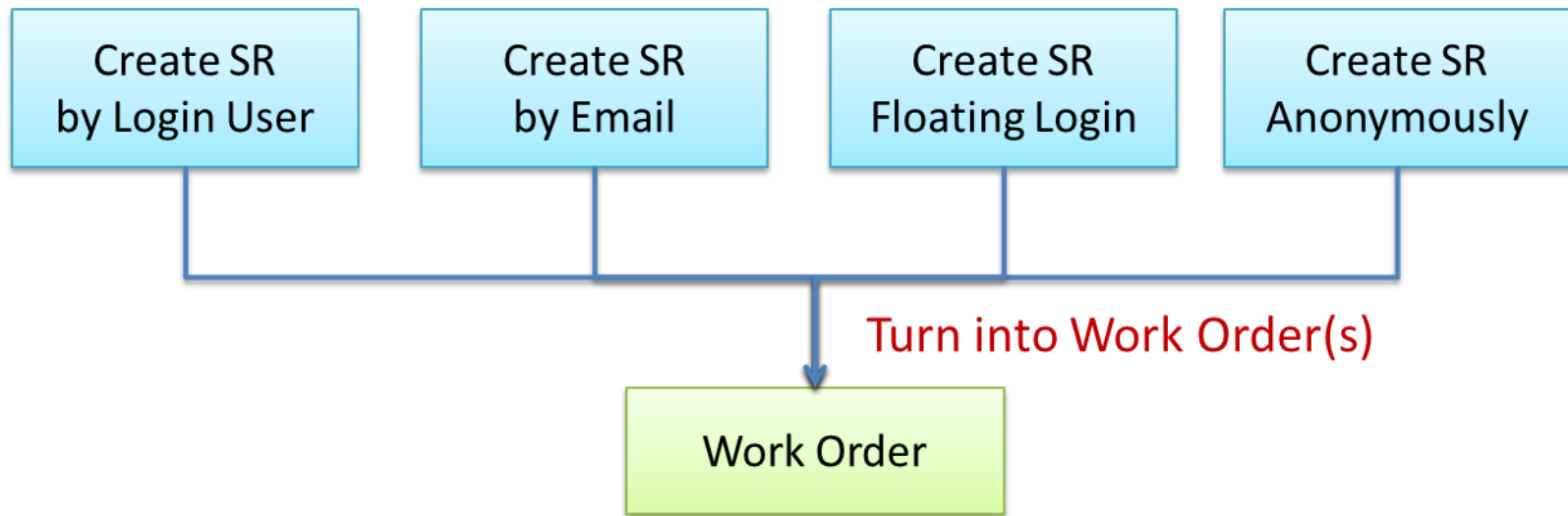
CalemEAM

- Option 1: Use work orders for work requests without SR
- Option 2: Use SR for requests, and create WO for approved SRs
- When to use SR?
  - Have customers (both internal and external) who report issues
  - Only maintenance staff are allowed to create work orders
- When not to use SR?
  - All users are allowed to create work orders
  - Would like to have a single place for all work requests
    - No need to check SR and WO in case of missing WOs for SRs
- Your business processes for work management may also play a role in the decision process

Role	Calem Object	Function
Maintenance Supervisor & Manager	SR Dispatcher SR Monitor	Approve SR Create WO for SR Close SR
Operations Supervisor & Manager (Internal or External)	SR Monitor	Create SR
Technical Staff (Internal)	Users of EAM Crew	Execute WO from SR Create WO
Operations Staff (Internal or External)	Users	Create SR

# SR Submission Options (2)

CalemEAM



- Option 1. Create SR by Login User
  - Customers or operational supervisors may log in and report issues.
- Option 2. Occasional Users by Floating Seats
  - Allocate a few floating seats for occasional users to create service requests.



- **Option 3. Email Issues**
  - **Send email to a configured email address for your service**
  - **Email Subject & Body: SR subject & description**
  - **Email Attachment: SR attachment**

- Set Priority, Subject, and Description
- Set an Asset or a Location (can be optional)

**Service Request**

Save Cancel Customize

Value is required: Priority

**Priority:** (Selection Required) ▼

**Category:** (Selection Required) ▼

**Description**

**Subject:**

**Description:**

**Asset or Location**

**Asset #:**

**Location:**

**Other**

**SLA contract:**

**Requester:** Calem Eam

**Contact:**

**Time requested:** 4/18/16 At: 6:14 AM Central

**Assignment**

**Assigned to:**

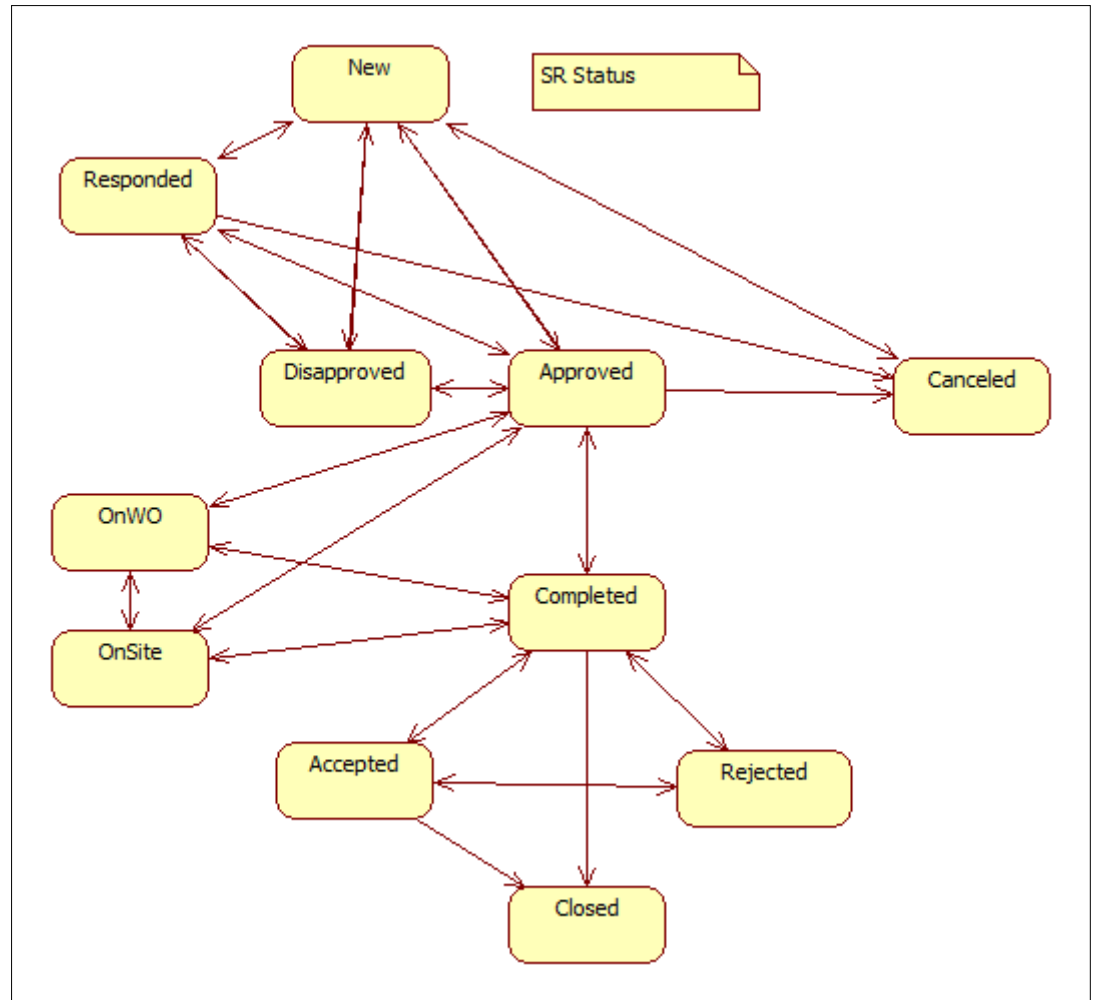
**Team assigned:**

**Project:**  **Proj. task:**

# SR Life-Cycles

CalemEAM

- SR Created
- SR Dispatcher Notified
  - Approve SR
  - Create WO
  - Assign to Techs
- Tech Staff
  - Complete WO
  - SR Completed
- SR Dispatcher Close SR



# SR Life-Cycle Status Permission

CalemEAM

## Status Permission by User Group:

- Menu path: Admin | Group | SR Status Tab | Exclude statuses

The screenshot displays the 'SR Status' configuration window. At the top, there are tabs: 'Main', 'WO Status', 'SR Status' (selected), 'Module', and 'Customize'. Below the tabs, the section is titled 'Group (6 of 23)'. It includes a toolbar with icons for adding, deleting, and customizing. The 'Group' field is set to 'Custom system' and the 'Parent group' is empty. The 'Type' is set to 'Desktop'. Below this, the 'Exclude SR Status (6)' section is shown, which contains a table of statuses to be excluded.

<input type="checkbox"/>	Status	Specification	Group
<input type="checkbox"/>	Closed	Manual entry	Custom system
<input type="checkbox"/>	Canceled	Manual entry	Custom system
<input type="checkbox"/>	Approved	Manual entry	Custom system
<input type="checkbox"/>	Accepted	Manual entry	Custom system
<input type="checkbox"/>	Rejected	Manual entry	Custom system
<input type="checkbox"/>	Disapproved	Manual entry	Custom system

- **Email Notifications**
  - **Creation**
  - **Status changes**
  - **Comments**
  - **Attachment**
- **Email Interaction**
  - **Reply to SR Email Notifications to add comments/attachments**
    - **Email contents will be added to SR as comments**
    - **Email attachments will be added to SR as attachments**


# Create WO from SR

CalemEAM

- Create WO for SR
- WO completion will turn SR to completed

MainWork OrderCommentLogCustomize

Service Request (2 of 228)

 Create WO

More

Customize

SR #: 5961SR type:Flag:State: Open

Asset #:forum\_3Priority: P5Status: NewResolution: OpenCategory: CorrectiveParent SR:Subject: testDescription: test

Location: StyleBeds.HQSite: StyleBeds.HQService site: MySiteWO type:Duplicate SR:

OriginationRequester: Calem EamNeed by:Time requested: Sun, 11/29/15 7:51 PM CentralContact:

- Responded SLA
- On-Site SLA
- Resolution SLA

Main
SR in WO
MOC
REQ
Comment
Child SR
Log
Customize

Service Request (6 of 295)

More
Customize

SR #: 18090
SR Type:
Flag:
State: Open

Assignment

Assigned To:
Assigned by:
Team assigned: MyTeam2
Time assigned:

Completion

Last completed:
Last closed:

SLA

SLA Contract:
Response Due:
On-WO Due:
On-Site Due:
Resolution Due:
SLA Notes:
Project:
Status to Child:
Alarmed (Resp):
Alarmed (On-WO):
Alarmed (On-Site):
Alarmed (Resolution):
Proj. task:

- Define On-Call Staff at Scheduling Module
- Search On-Call Staff at SR or Scheduling Module

The screenshot displays the CalemEAM Scheduling Module interface. The top header includes the CalemEAM logo, a welcome message, the current date and time, and the version number. The main navigation bar contains several tabs: Schedule, Weekly Schedule, Schedule WO, Open, My Schedule, and Schedule. A dropdown menu is open for the 'Schedule' tab, showing options like User schedule, Daily Summary, Time Off, Site Time Off, Shutdown schedule, On-Call Search, and On-Call List. The 'On-Call Search' option is highlighted with a red box. The left sidebar lists various modules: Favorite, Dashboard, Admin, Analysis, Asset, Contract, Document, Integration, and Inventory. The main content area is titled 'On-Call Search' and contains a search form. The form has a 'Save' button, a 'Cancel' button, and a 'Customize' button. Below these buttons, a red error message states: 'The field value for the lookup is not valid.: Customer Site'. The form also includes a 'Customer Site' field with a dropdown arrow, a 'From' date field set to 1/1/15, and a 'To' date field set to 1/1/15.

Welcome, Calem Eam. Thu, 1/1/15 9:56 AM Central

Calem Enterprise 10b

**Schedule** Weekly Schedule Schedule WO Open My Schedule Schedule

Favorite  
Dashboard  
Admin  
Analysis  
Asset  
Contract  
Document  
Integration  
Inventory

**On-Call Search**

Save Cancel Customize

The field value for the lookup is not valid.: Customer Site

**Customer Site:** [Dropdown]

**From:** 1/1/15 [Calendar]

**To:** 1/1/15 [Calendar]

User schedule  
Daily Summary  
Time Off  
Site Time Off  
Shutdown schedule  
**On-Call Search**  
On-Call List



- Email SR to people by emails

Service Request (2 of 228)

SR #: 5961

Flag:

Need by:

Assignment

Assigned to:

Assigned by:

Completion

Last completed:

SLA

SLA contract:

More

- Responded
- Approve
- Reopen
- Email
- Status log
- Customize

Contact:

Team assigned: MyTeam2

Time assigned:

Last closed:

## Hands-on

- Create an SR manually as a login user
- Set up SR life-cycle access permission
- Create SR via email
- Create WO from SR

# Next Module – Change Management

CalemEAM

Asset and  
Location

Maintenance  
Schedules

Contract and SLA

Work Order

Service Request

Change Management

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