

Part 2.4: Maintenance Functions – Service Request

Calem Enterprise Training

Summer 2024

Austin, Texas



What are the goals - SR

CalemEAM

Goals

I know how to evaluate if SR should be implemented

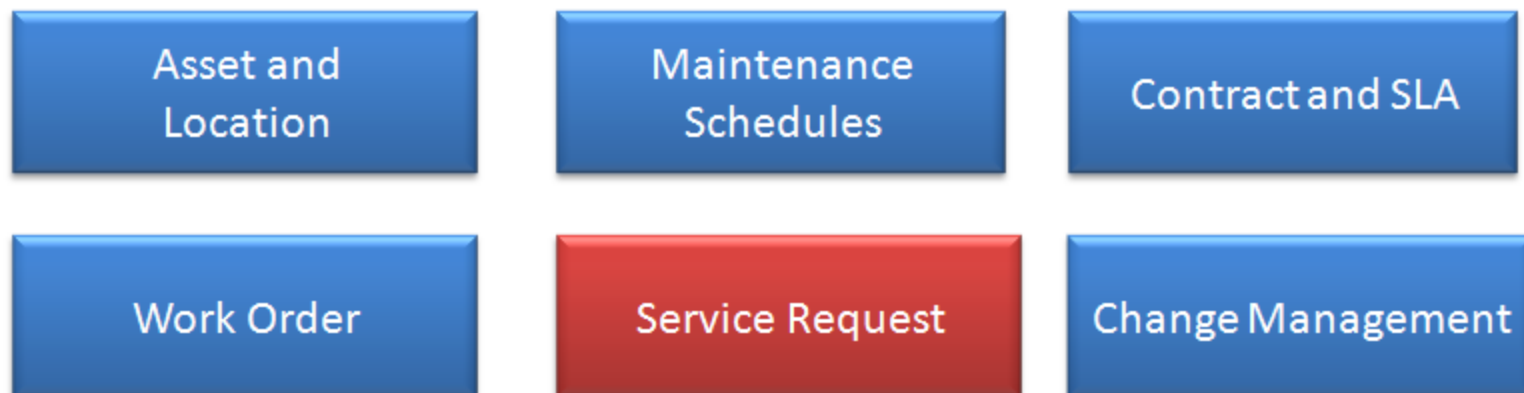
I know how to evaluate what options to use for SR submission

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

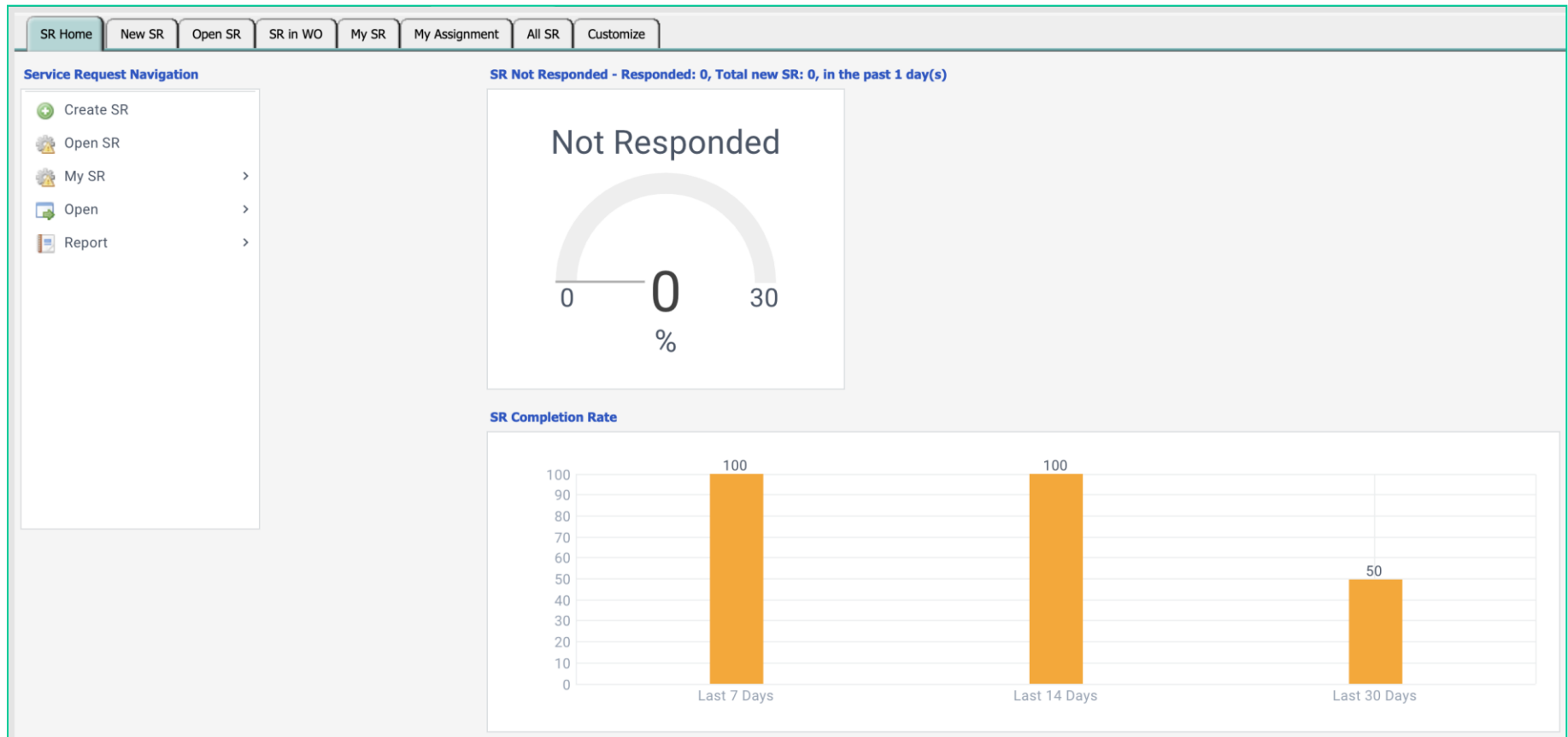
I know how to turn an SR to a work order



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

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

Service Request – When to Use SR

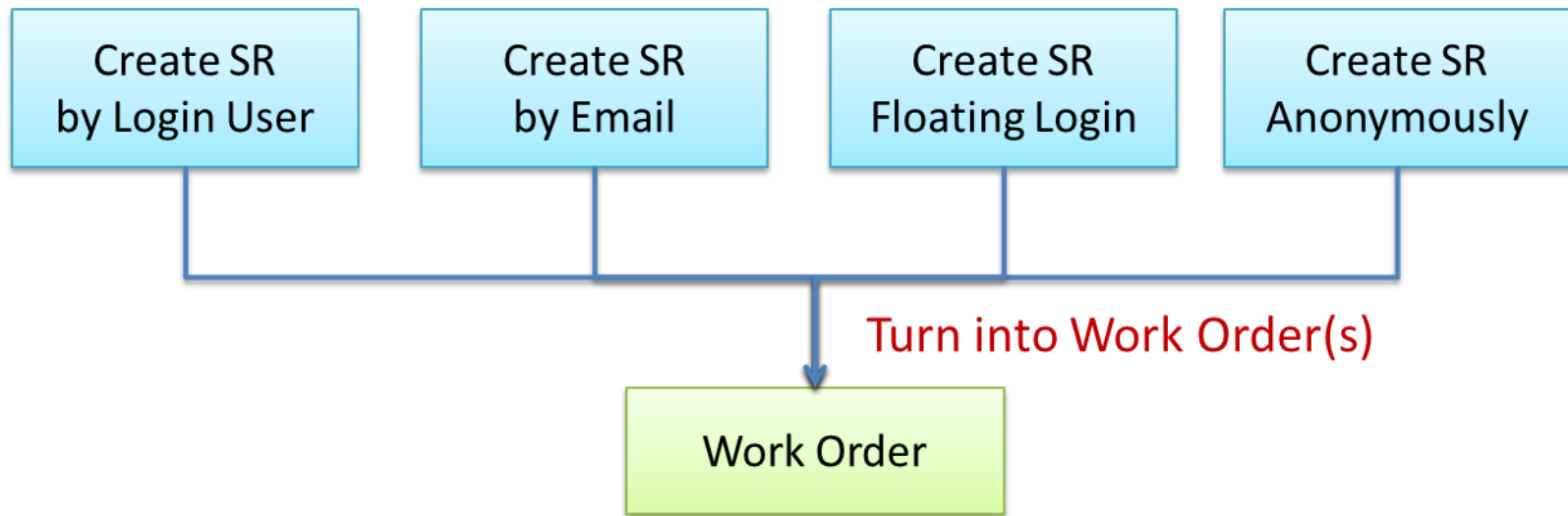
CalemEAM

- 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)

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- 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:

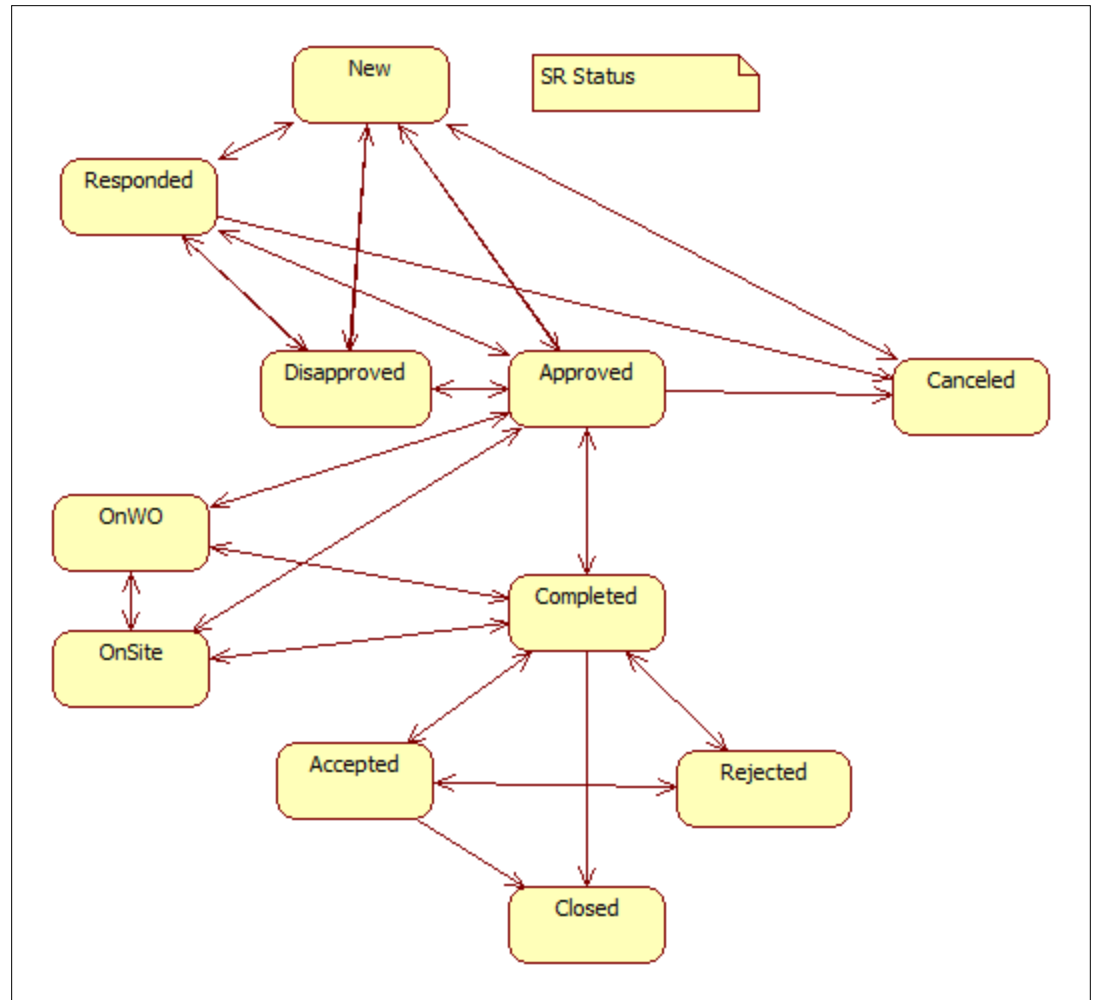
Team assigned:

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


MainWO StatusSR StatusModuleCustomize

Group (6 of 23)







Customize

Group:  Custom system

Parent group: Type: Desktop 

Exclude SR Status (6)



Customize

<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_3

Priority: P5

Status: New

Resolution: Open

Category: Corrective

Parent SR:

Subject: test

Description: test

Location: StyleBeds.HQ

Site: StyleBeds.HQ

Service site: MySite

WO type:

Duplicate SR:

Origination

Requester: Calem Eam

Need by:

Time requested: Sun, 11/29/15 7:51 PM Central

Contact:

- Responded SLA
- On-Site SLA
- Resolution SLA

Main
SR in WO
MOC
REQ
Comment
Child SR
Log
Customize

Service Request (6 of 295)

Create WO
 Attach Photo
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, the text "Welcome, Calem Eam. Thu, 1/1/15 9:56 AM Central", and the version "Calem Enterprise 10b". Below the header is a navigation bar with tabs: "Schedule", "Weekly Schedule", "Schedule WO", "Open", "My Schedule", and "Schedule". A left sidebar contains a list of modules: Favorite, Dashboard, Admin, Analysis, Asset, Contract, Document, Integration, and Inventory. The main content area is titled "On-Call Search" and features a "Save" button, a "Cancel" button, and a "Customize" button. A red error message states: "The field value for the lookup is not valid.: Customer Site". Below this, the "Customer Site" field is highlighted in yellow. The "From:" and "To:" fields are set to "1/1/15". A dropdown menu is open, showing options: "User schedule", "Daily Summary", "Time Off", "Site Time Off", "Shutdown schedule", "On-Call Search", and "On-Call List". The "On-Call Search" and "On-Call List" options are highlighted with a red border.

- Email SR to people by emails

MainWork OrderCommentLogCustomize

Service Request (2 of 228)

Create WO

More

Customize

SR #: 5961

Flag:

Need by:

Assignment

Assigned to:

Assigned by:

Completion

Last completed:

SLA

SLA contract:

Contact:

Team assigned: MyTeam2

Time assigned:

Last closed:

Responded

Approve

Reopen

Email

Status log

Customize

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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