

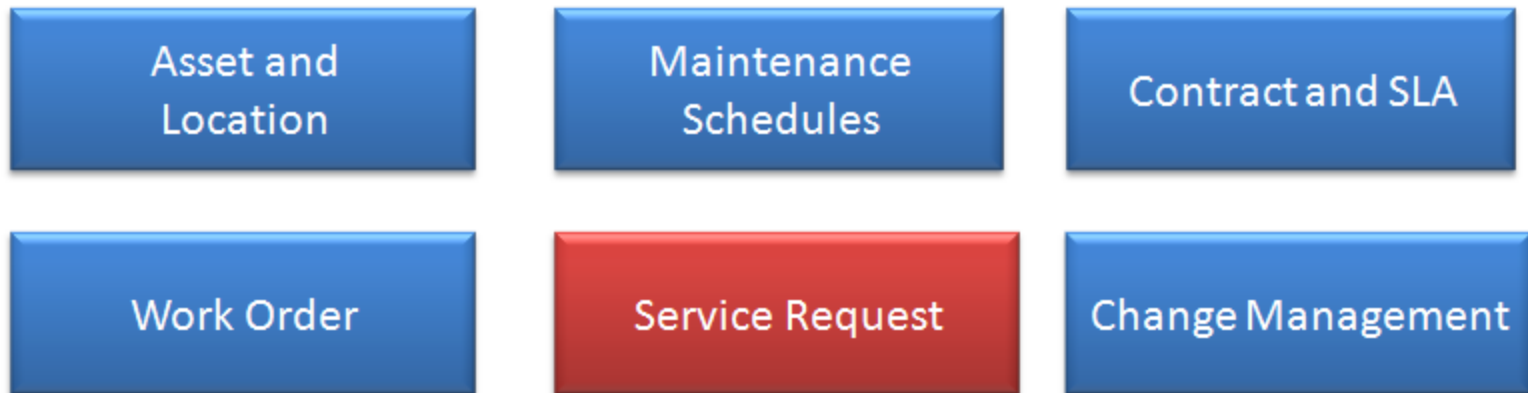
Part 2.4: Maintenance Functions – ServiceReq

Calem Enterprise Training

Commercial Open Source EAM/CMMS

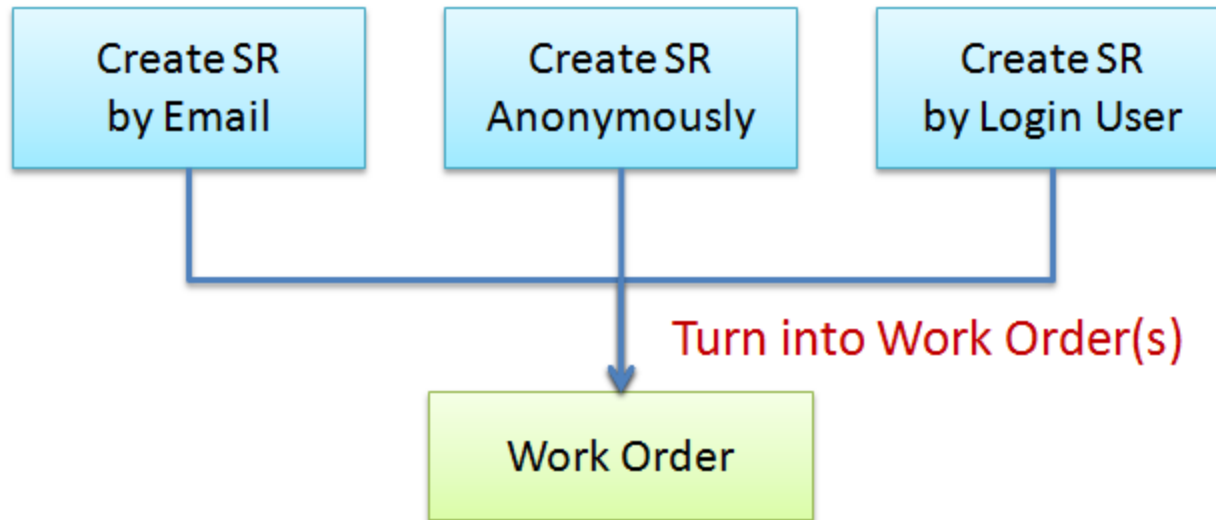
Austin, Texas





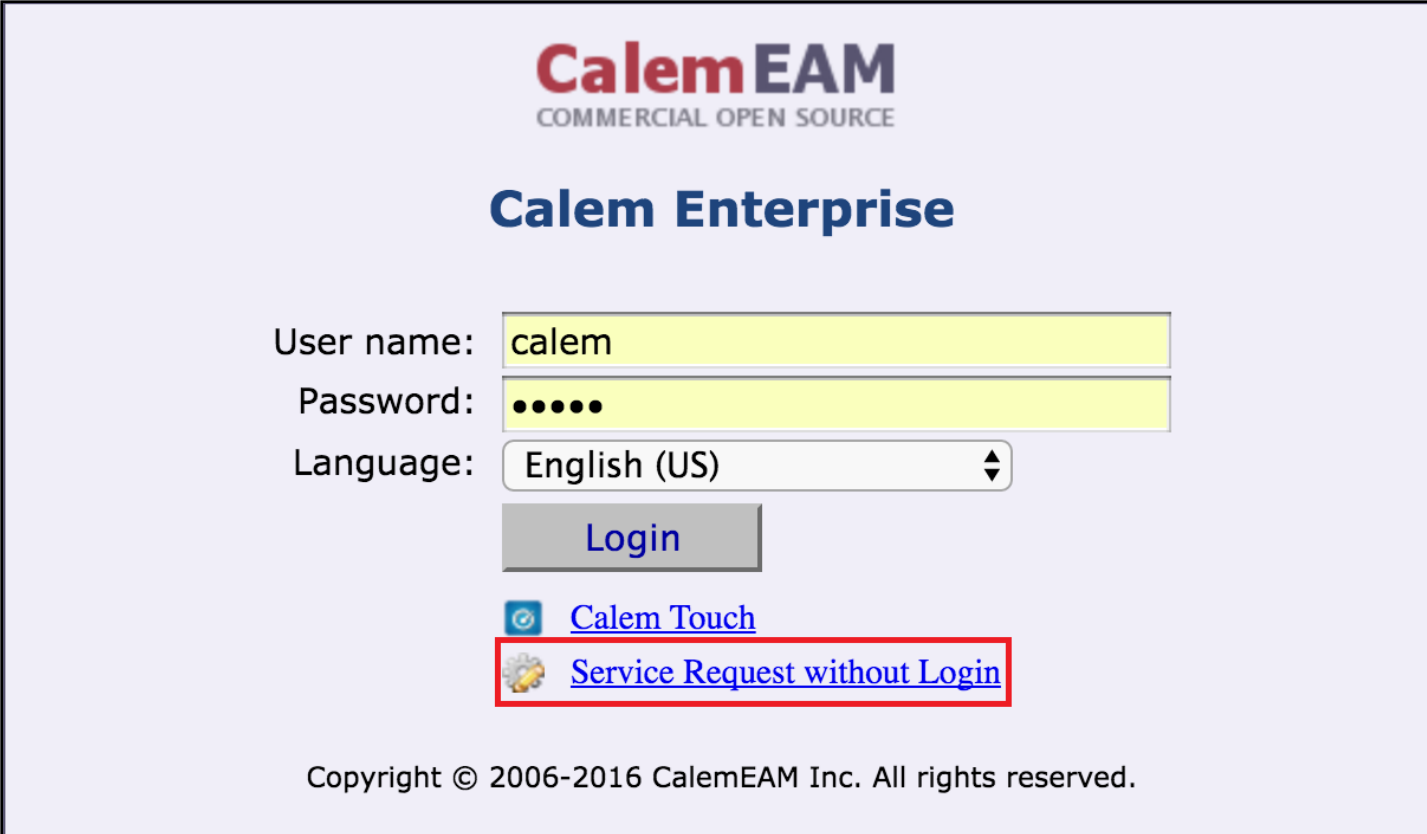
- **Creation**
- **Life-Cycles and Notifications**
- **Create WO from SR**
- **SLA**
- **On-Call Search**
- **Email SR**

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 or External)	Users of EAM Crew	Execute WO from SR Create WO
Operations Staff (Internal or External)	Users	Create SR



- Send email to a configured email address for your service
- Must be sent from **xyz@your-domain.com**
 - “**your-domain.com**”: email domain of your company or customers
 - Email Subject: SR subject
 - Email Body: SR description
 - Email Attachment: SR attachment

- Anonymous Submission from Calem
- Embed Anonymous SR submission into your web site



CalemEAM
COMMERCIAL OPEN SOURCE

Calem Enterprise

User name:

Password:

Language:

[Login](#)

[Calem Touch](#)


[Service Request without Login](#)


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SR Submission – Anonymous Entry

- Set Priority, Subject, Description
- Select an Asset or a Location, Requester Email and Name
- Enter a Pin (for spam control)


Create SR (Anonymous)


 Save

 Value is required: Priority



Priority:  (Selection Required) ▼



Description

Subject: 

Description: 


Asset or Location



Asset #:  

Location:  

Origination

Requester email:

Requester name: 

Time requested:   At:

Pin:

- 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

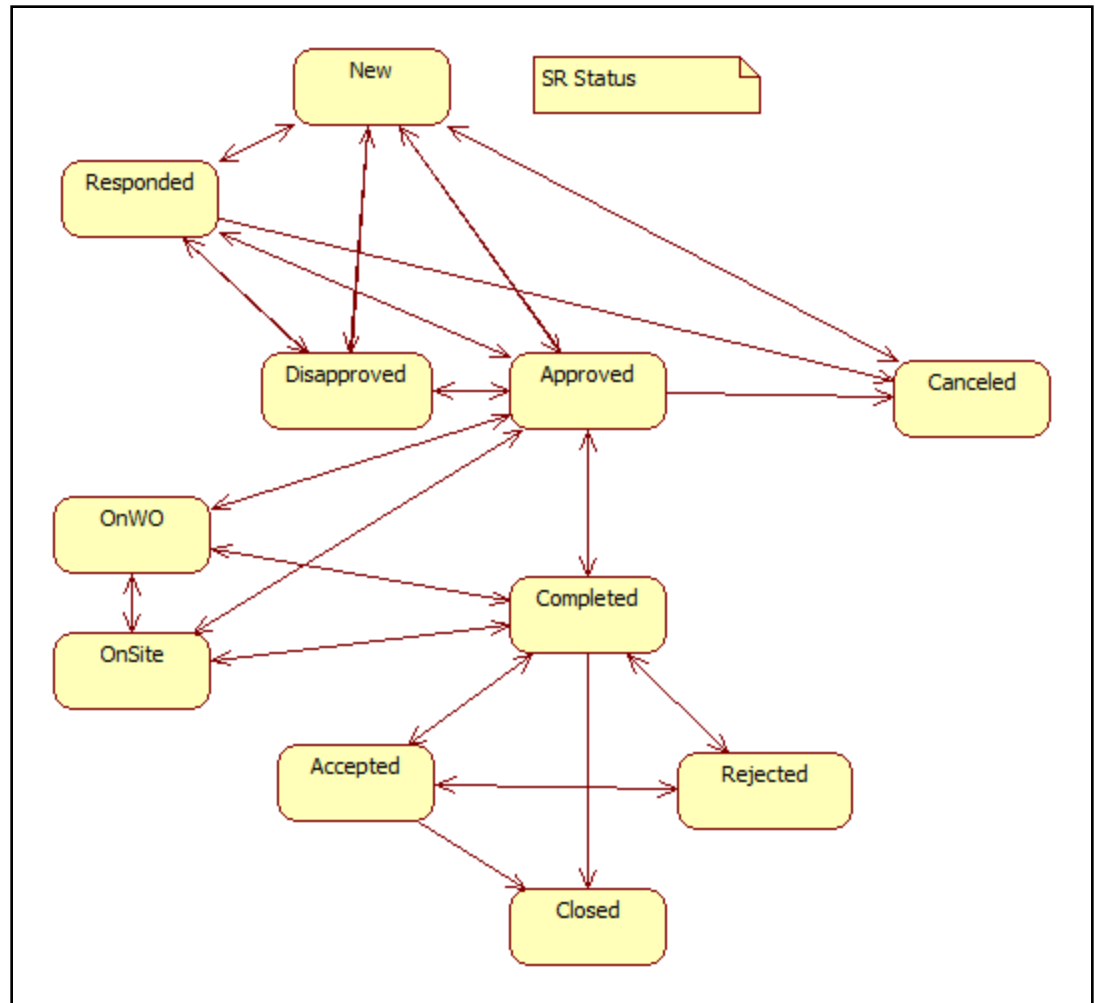
Assignment

Assigned to:

Team assigned:

Project: **Proj. task:**

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



- **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

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

Main Work Order Comment Log Customize

Service Request (2 of 228)

Create WO More Customize

SR #: SR type:

Flag: State:

Asset #: **Location:**

Priority: **Site:**

Status: **Service site:**

Resolution: **WO type:**

Category: **Duplicate SR:**

Parent SR:

Subject:

Description:

Origination

Requester: **Time requested:**

Need by: **Contact:**


- Responded SLA
- On-Site SLA
- Resolution SLA

SLA

SLA contract:

Alarmed:	<input type="checkbox"/>	Last alarmed:	<input type="text"/>
Alarmed (Resp):	<input type="checkbox"/>	Alarmed (Resp):	<input type="text"/>
SLA response:	<input type="text"/>	Resp UOM:	<input type="text"/>
Actual response:	<input type="text"/>	Resp SLA:	<input type="text"/>
Time responded:	<input type="text"/>	Responded by:	<input type="text"/>
Alarmed (onsite):	<input type="checkbox"/>	Alarmed (onsite):	<input type="text"/>
SLA Onsite:	<input type="text"/>	Onsite UOM:	<input type="text"/>
Actual onsite:	<input type="text"/>	Onsite SLA:	<input type="text"/>
Onsite WO:	<input type="text"/>	Onsite Time:	<input type="text"/>
Alarmed (Resolution):	<input type="checkbox"/>	Alarmed (resolution):	<input type="text"/>
SLA Resolution:	<input type="text"/>	Res UOM:	<input type="text"/>
Actual resolution:	<input type="text"/>	Res SLA:	<input type="text"/>
Resolution WO:	<input type="text"/>	Resolution Time:	<input type="text"/>

SLA Notes:



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

The screenshot displays the CalemEAM Scheduling Module interface. At the top, the header includes the CalemEAM logo (COMMERCIAL OPEN SOURCE), a welcome message "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 "Schedule" and several icons for "Weekly Schedule", "Schedule WO", "Open", "My Schedule", and "Schedule".

On the left side, there is a vertical menu with icons and labels for "Favorite", "Dashboard", "Admin", "Analysis", "Asset", "Contract", "Document", "Integration", and "Inventory".

The main content area is titled "On-Call Search". It features a "Save" button, a "Cancel" button, and a "Customize" button. Below these is a red error message: "The field value for the lookup is not valid.: Customer Site".

The "Customer Site:" field is highlighted in yellow and contains a red flag icon. Below it are "From:" and "To:" date pickers, both set to "1/1/15".

A dropdown menu is open on the right side of the "On-Call Search" section, listing several 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 rectangular border.

- Email SR to people by emails

The screenshot displays the CalemEAM interface for a Service Request (SR) with ID 5961. At the top, there are navigation tabs: Main, Work Order, Comment, Log, and Customize. Below the tabs, the title 'Service Request (2 of 228)' is shown. A toolbar contains icons for editing, navigation, and actions like 'Create WO' and 'Customize'. A 'More' dropdown menu is open, listing options: Responded, Approve, Reopen, Email (highlighted with a red box), Status log, and Customize. The main area shows fields for SR # (5961), Flag, Need by, Assignment, Assigned to, Assigned by, Completion, Last completed, SLA, SLA contract, Contact, Team assigned (MyTeam2), Time assigned, and Last closed.

Hands-on

- Create SR manually
- Create SR via email
- Create SR Anonymously
- 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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