

# Part 2.5: Maintenance Functions – Change Management

## Calem Enterprise Training

Summer 2022

Austin, Texas



# What are the goals – Change Management

CalemEAM

## Goals

I know the life-cycle of change management

I know how to set up class tree for changes

I know how to set up teams for change management

I know how to use My Change Lists

I know how to execute changes

I know how to view change calendar (TBD)

I know how to execute asset/location changes in work orders (TBD)

Asset and  
Location

Maintenance  
Schedules

Contract and SLA

Work Order

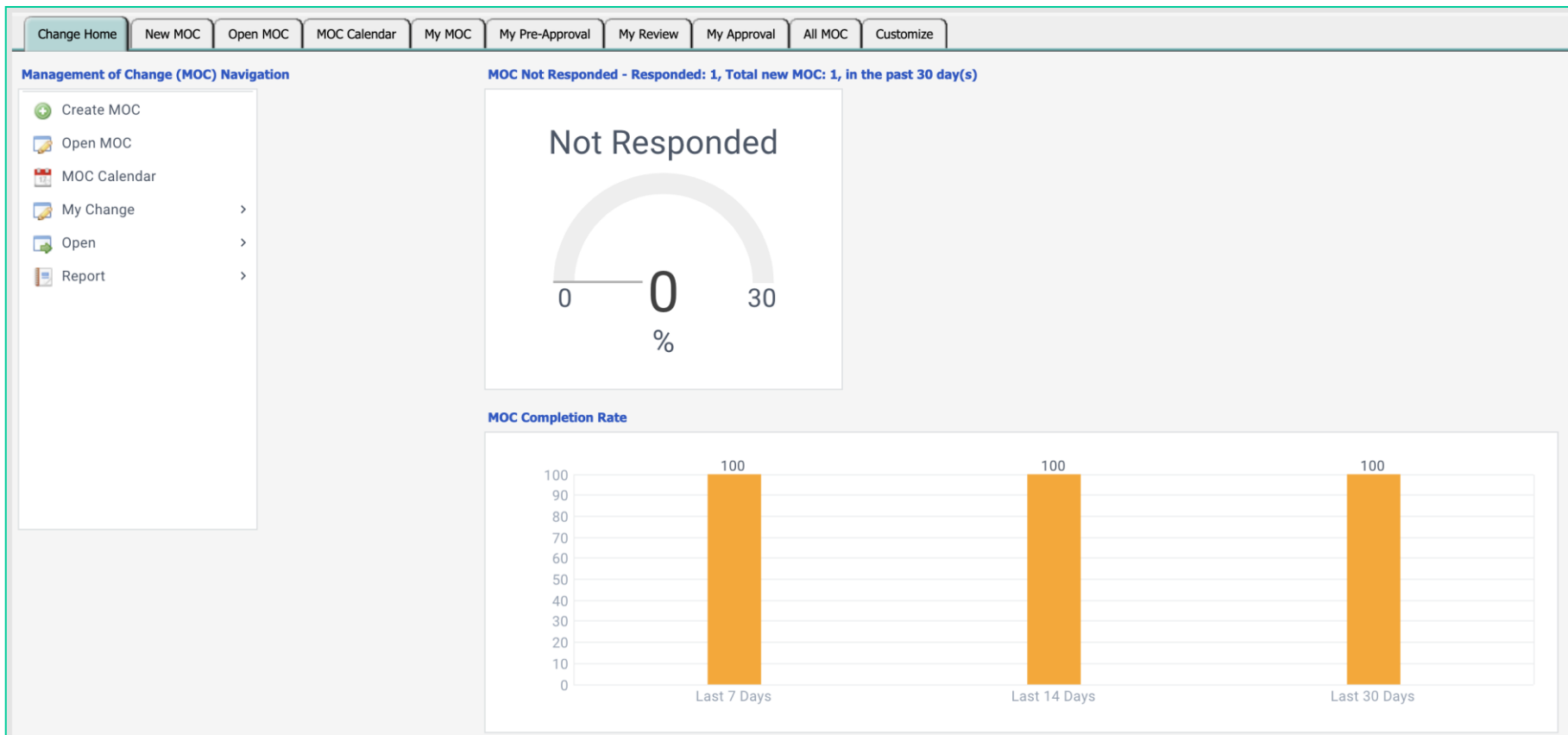
Service Request

Change Management

# Product – Change Management

CalemEAM

- Include stake holders in changes
- Drive quality through change processes
- Organize changes by class hierarchy



# Change Management – Why the Function?

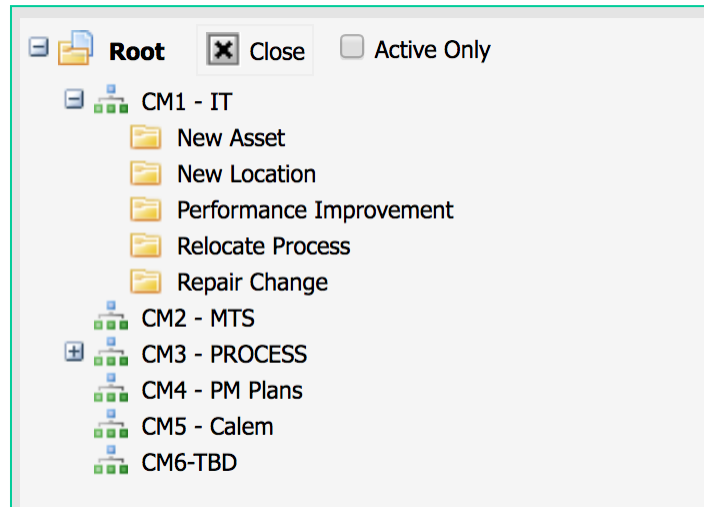
CalemEAM

Management of Change (MOC) is the module for change management.

- Use Changes to adapt and improve your maintenance operations
- Use Calem to standardize your change processes

Use class tree to organize changes

- Menu: Organization | Codes | Class List
- The class tree is shown when you lookup a class from change creation screen.



# Change Management - Roles

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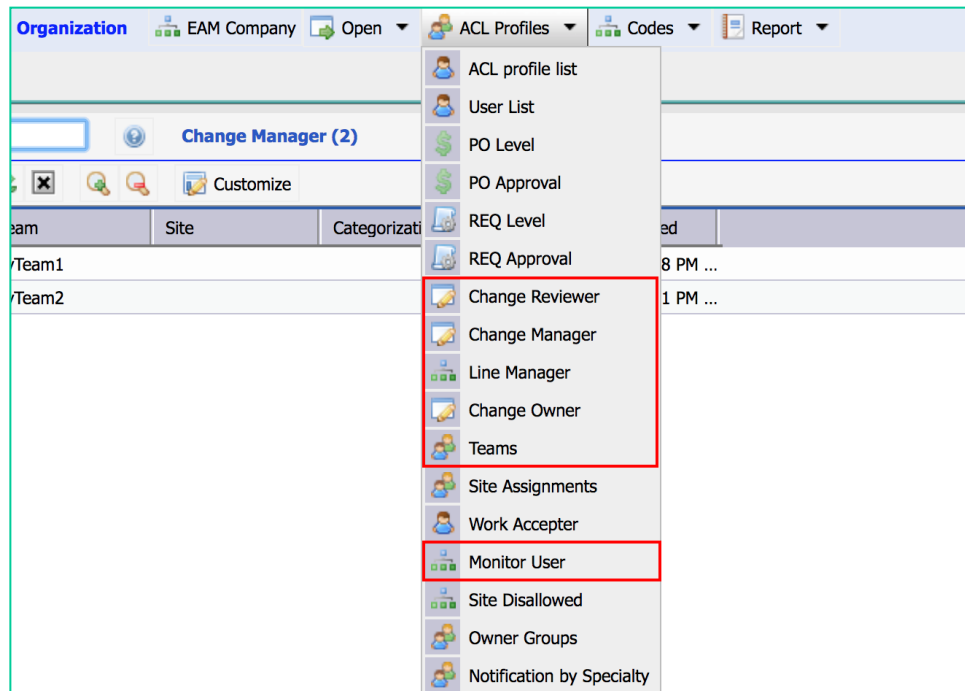
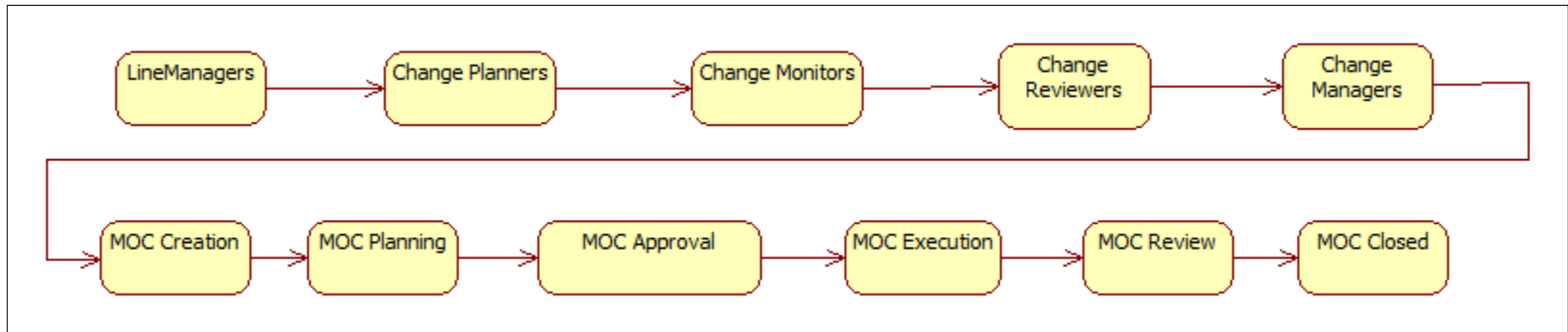
Teams are used for some change roles so team members can fill in as needed.

Role	Calem Object	Function
Line Managers	Maintenance Manager Team	Pre-Approve MOC
Change Coordinators	Change Planners	Assign Reviewers, Change Managers
Change Review Board	Reviewer Team	Review MOC
Change Managers	Change Manager Team	Approve MOC
Change Monitors	Change Monitors	Get MOC notifications
Change Owners	Owner Team	Execute MOC
Change Requestor	Users	Create MOC

# Change Management - Implementation

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- Set up roles at Organization Module | ACL Profiles





# Change Management – Implementation 2

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Roles can be configured by Site | Class

- Set Site to empty for all sites
- Set Class to Empty for all Classes
- You may have a team with empty class as default and other teams with classes

The following is one configuration for consideration

Role	By Site	By Class
Line Managers	Yes	No
Change Coordinators	Yes with default	N/A
Change Review Board	No	Yes with default
Change Managers	No	Yes with default
Change Monitors	Yes with default	N/A
Change Owners	Yes with default	Yes with default
Change Requestor	N/A	N/A

# Change Management – Default Roles

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Calem populates a change with default roles.

- Based on categorization of a change
  - The categorization is used to find defaults.
  - If not found its immediate parent categorization is used to find the defaults.
- Based on the asset/location site of a change




Role	By Site	By Class
Line Managers	Yes	No
Change Review Board	No	Yes with default
Change Managers	No	Yes with default
Change Owners	Yes with default	Yes with default


# Change Management – Creation



CalemEAM

- Set Categorization
- Set Asset or Location
- Enter Change Description



**Changes**



 Save  Cancel  Customize

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

**Categorization:**  


**Asset or Location (not both)**

**Asset Tag:**  

**Location:**  



**WO priority:**



**Description**


**Change desc.:** 

**Desc (Not in Kind):**

**Other**

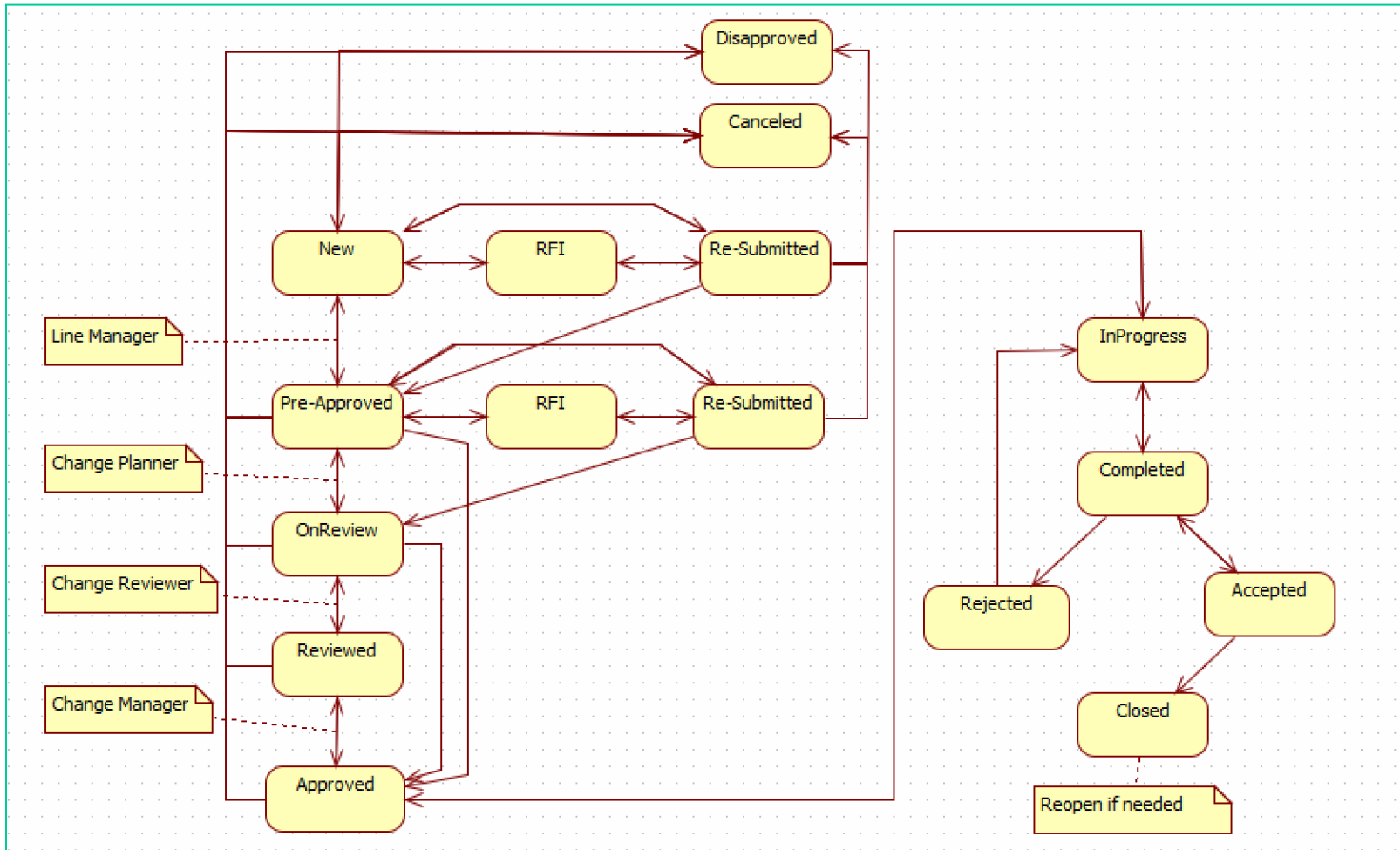
**Requester:**  

**Time requested:**   

**Need by:**  

## Change Management – Life-Cycles

# CalemEAM



Event	Role
MOC Created	Line Manager Notified Pre-Approve MOC
Pre-Approved	Change Planner Notified Assign Reviewers Start Review Process
Reviewed	Change Manager Notified Approve MOC
Approved	Tech Staff Notified Execute MOC
Completed	Change Manager Notified Review/Close MOC

# Change Management – TaskView & DataView

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- Switch between TaskView & Data View Instantly

1 Submission 2 Planning 3 Approval 4 Execution 5 Review 6 Close History **DataView** Customize

**MOC Request (2 of 24)**

Status Log Create WO Customize More

MOC #: 28  
Subject: My moc  
Status: In Process Service site: MySite  
Actual start: Actual finish:

**Step (0)**

Customize

Seq	Action step	Assigned to	Need by	Time completed
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Main Review WO Doc Log History **TaskView** Customize

**MOC Request (1 of 24)**

Create WO Status Log Customize More

MOC #: 29 Subject: My chg  
Asset #: JJ.CA.AC-001 Asset note:

Location: OH-CA-001 Site: JJ.CA  
Status: New Service site: MySite  
Reviewed: None State: Open  
Requester: Calem Eam Time requested: Tue, 3/22/16 10:31 AM Central  
Owner: Change Manager: Ben Manning Need by:  
Has training doc?: WO priority: P3  
Actual start: Actual finish:

- Set Impact, Execution and Rollback Plans

✓ 1 Submission

✓ 2 Planning

✓ 3 Approval

▶ 4 Execution









● 5 Review

● 6 Close

● History

● DataView

**MOC Request (2 of 24)**

 Status Log Customize More ▼

**MOC #:**   
**Subject:**   
**Status:**   
**Line Manager:**  
**Change Manager:** [Calem Eam](#)  
**Service site:**   
**Owner:**  
**Requester:**

**Planning**

**Impact:**





**Execution plan:**





**Rollback plan:**





# Change Management – Planning

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- Set Reviewers, Steps, and Downtime
- Set Attachment and Docs

Review (2)						
			 Customize			
<input type="checkbox"/>	#	Assigned to	Section	Status	Review by	Review time
<input type="checkbox"/>	1	Calem Eam	1-Env/Health/Safet...	Reviewed	Calem Eam	3/19/16 12:58 P...
<input type="checkbox"/>	2	Calem Test (no L...	1-Env/Health/Safet...	Reviewed	Calem Eam	3/19/16 1:06 PM...

Step (0)					
			 Customize		
<input type="checkbox"/>	Seq	Action step	Assigned to	Need by	Time completed

Planned downtime (0)				
			 Customize	
<input type="checkbox"/>	Start time	Hours	Note	Last modified



- An X-Day Review Window is available. It can be enabled.
- A review team may approve or reject the change in their review line.
- A review line is auto-approved X days after a change is transition to On-Review status.

# Change Management – Execution

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- Complete Steps
- Create WO and Complete them if applicable
- Add Comments

## Step (0)



Customize

Seq

Action step

Assigned to

Need by

Time completed

## Work Order (0)



Customize



#

Wo #

Asset #

Location

Status

Assigned to

Actual start

Actual finish

Last modified

# Change Management – Complete & Close

CalemEAM

- Change Manager reviews completed MOC
- Accept and Close; OR Reject for rework

✓ 1 Submission

✓ 2 Planning

✓ 3 Approval

✓ 4 Execution

▶ 5 Review

● 6 Close

● History

● DataView

● Customize

MOC Request (2 of 24)

↑

↓

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Status Log

🔧

Customize

More ▼

Accepted

Rejected

MOC #:

28

Subject:

My moc

Status:

Completed

Requester:

Calem Eam

Owner:

Change Manager:

Calem Eam

Actual start:

Service site:

MySite

Time requested:

Sat, 3/19/16 11:22 AM Central

Line Manager:

Need by:

Actual finish:

Comment (0)

+

-

🔄

🔧

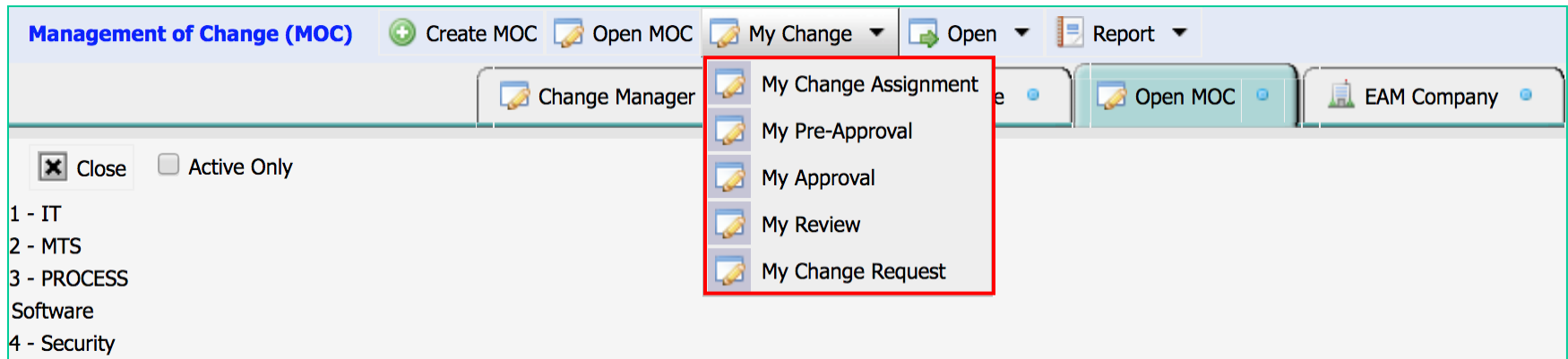
Customize

Modified by	Comment	To status	Last modified
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# Change Management – My Change Lists

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My change lists are provided for change roles

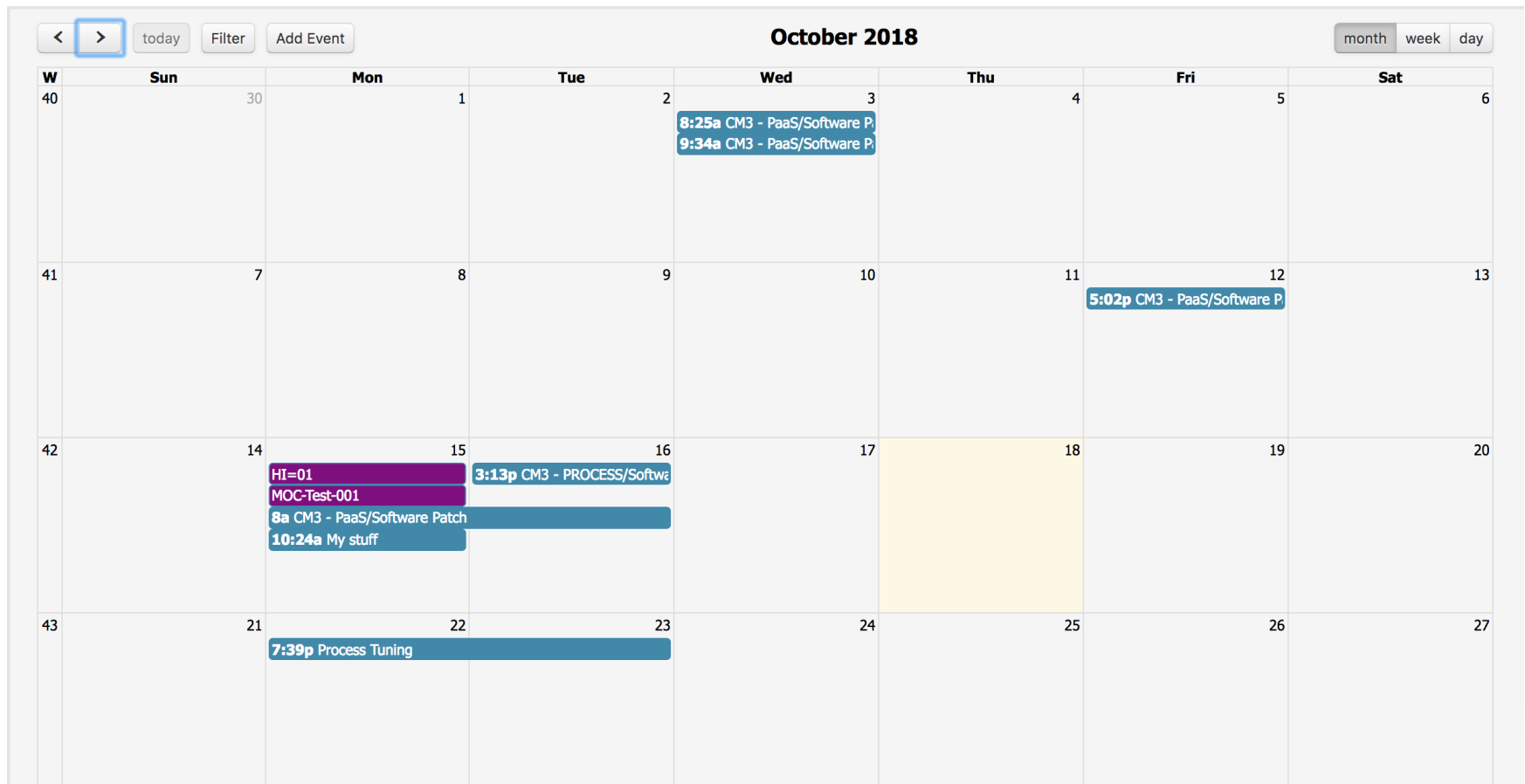


# Change Management – WO Calendar

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The MOC Calendar shows MOC work orders and events

- <http://www.calemeam.com/calemcustomers-2/how-to-use-the-calendar-view-for-change-management>



# CalemEAM

- **Work Order Execution Tab**

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# Track Asset/Location Changes from WO - 2




CalemEAM

Allow and track asset and location changes from work orders

- Edit Asset/Location Attributes
- Set Geolocation (latitude, longitude)
- Set Categorization

[Work Order \(Task\)](#) > Option Lookup

**Option (3)**

 Select  Cancel  Customize

#	Option
1	Edit Attributes
2	Set Geolocation
3	Set Categorization

# Change Management – Hands-On Lab

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- Set up change class tree
- Set up default line managers
- Set up default reviewers
- Set up default change managers
- Set up default owner teams
- Create an MOC
- Move the MOC through its life-cycle to closed.



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