Part 2.7: Maintenance Functions – Dashboard & Reports

Calem Enterprise Training

Summer 2024

Austin, Texas

Goals
I know that dashboard, analysis and reports are available
I know that reports are ACL profile compliant
I know that report layout can be customized

What are the goals - Dashboard

Goals
I know how to read summary KPIs
I know how to read WO P&S KPIs
I know how to read Asset KPIs
I know how to read Inventory KPIs
I know how to read the WO LogBook
I know how to read WO SLA KPIs
I know how to read WO PM/EMS KPIs
I know how to read WO Misc KPIs

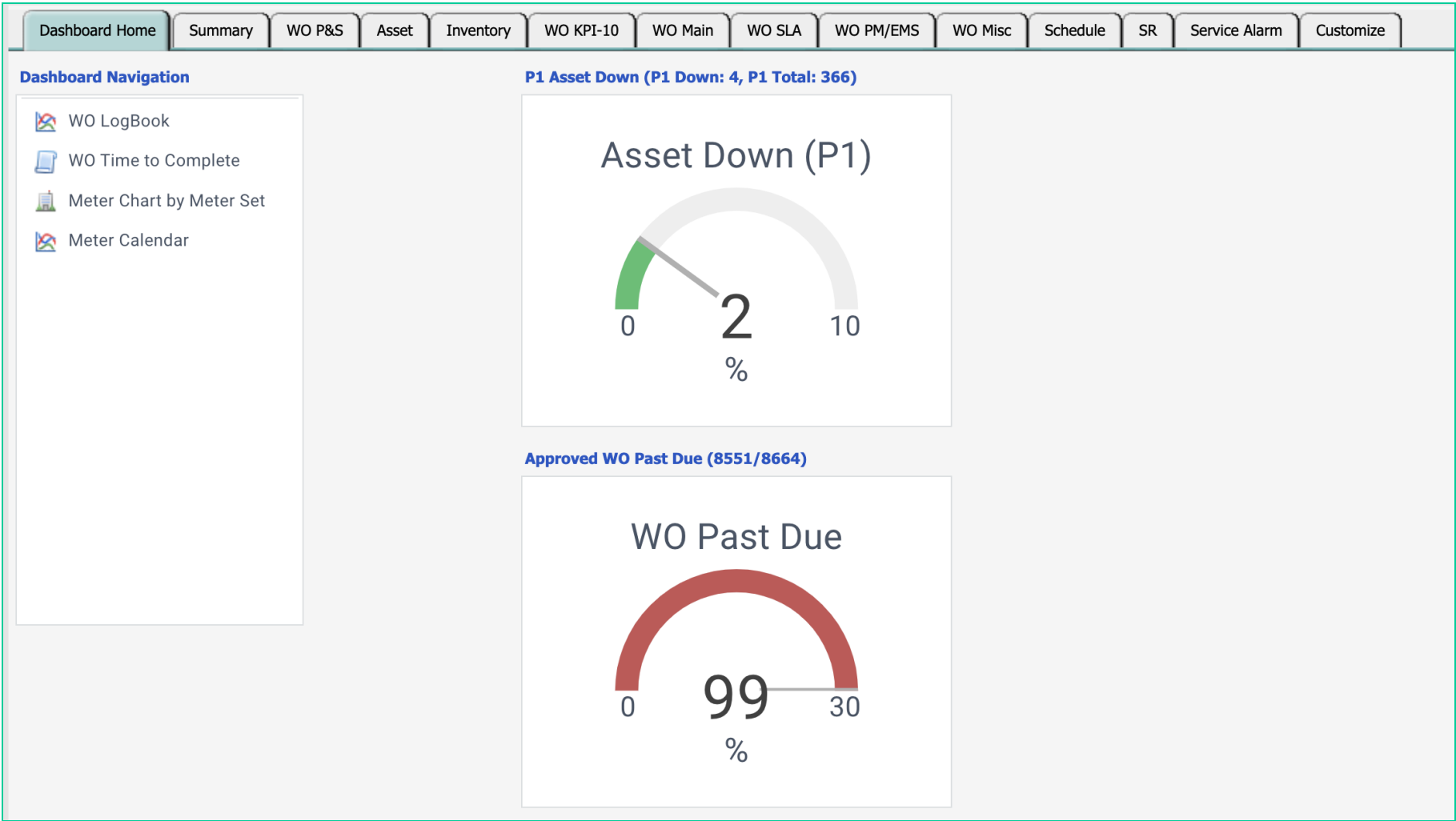# What are the goals – Analysis Module

Goals
I know that work summary reports by various grouping
I know that asset and location summary by various grouping
I know that work order labor summary including actual labor
I know that asset downtime summary by various grouping

Product – Dashboard

| Dashboard Home | Summary | WO P&S | Asset | Inventory | WO KPI-10 | WO Main | WO SLA | WO PM/EMS | WO Misc | Schedule | SR | Service Alarm | Customize |

Dashboard Navigation

- WO LogBook
- WO Time to Complete
- Meter Chart by Meter Set
- Meter Calendar

P1 Asset Down (P1 Down: 4, P1 Total: 366)

Asset Down (P1)

0   **2**   10
%

Approved WO Past Due (8551/8664)

WO Past Due

0   **99**   30
%

Calem Reporting includes:

- Dashboard: summary and graphs
- Analysis: summary with grouping
- Reports: each module may have own reports
  - Work Order **|** Report
  - Asset **|** Report
  - PM **|** Report
  - Inventory **|** Report
  - Other modules

Reports and ACL Profiles

The report data is based on the ACL Profile of the login user.

- If the login user has access to all sites, the dashboard is for all sites.
- If the login user has access to selective sites, the dashboard reflects that.

Reports Customization

A list report can be customized just like a list form in Calem.

New reports need to be created by Calem.

Additional reporting tools can be used with Calem database directly
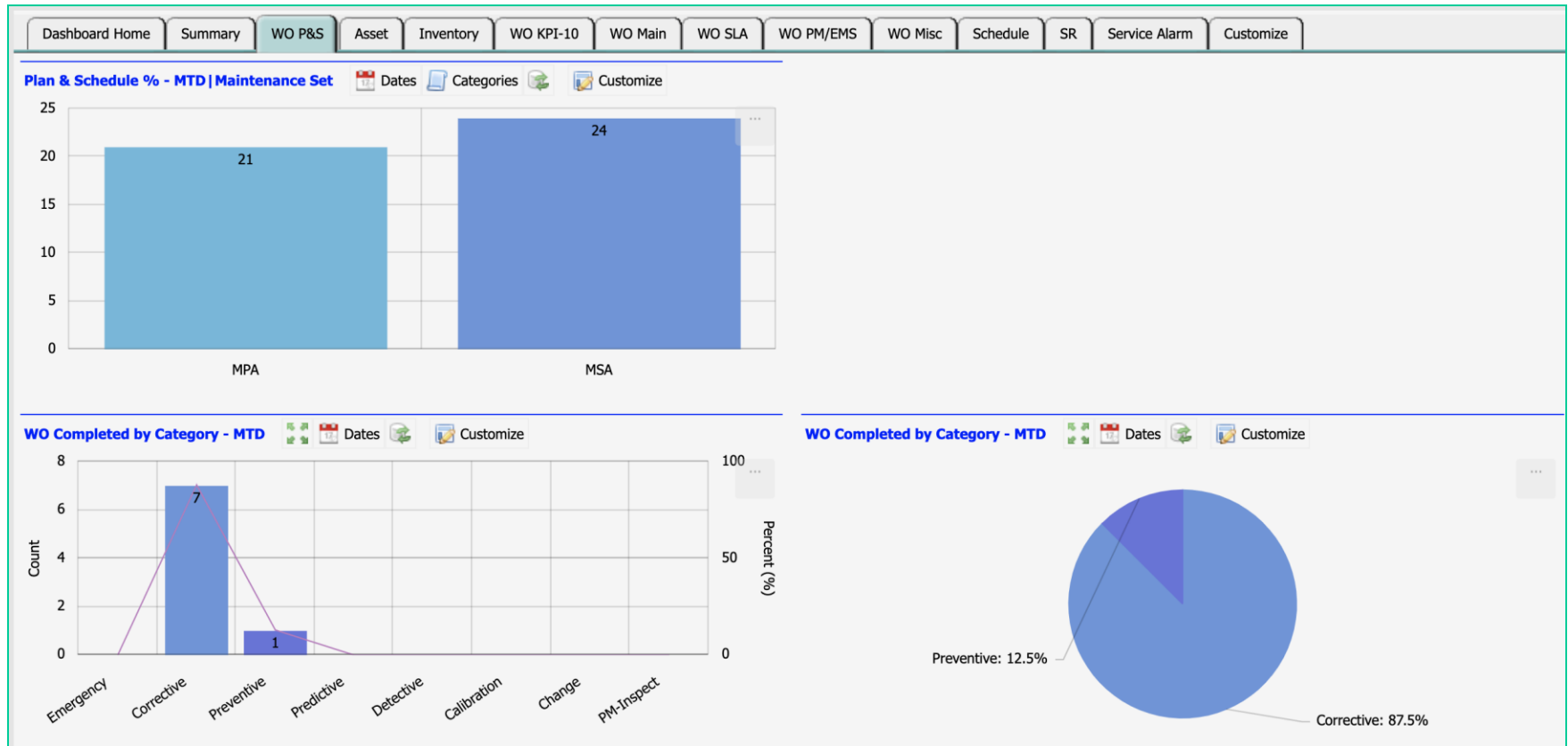
Product – WO Summary Dashboard

Product – WO Summary Multi-Site

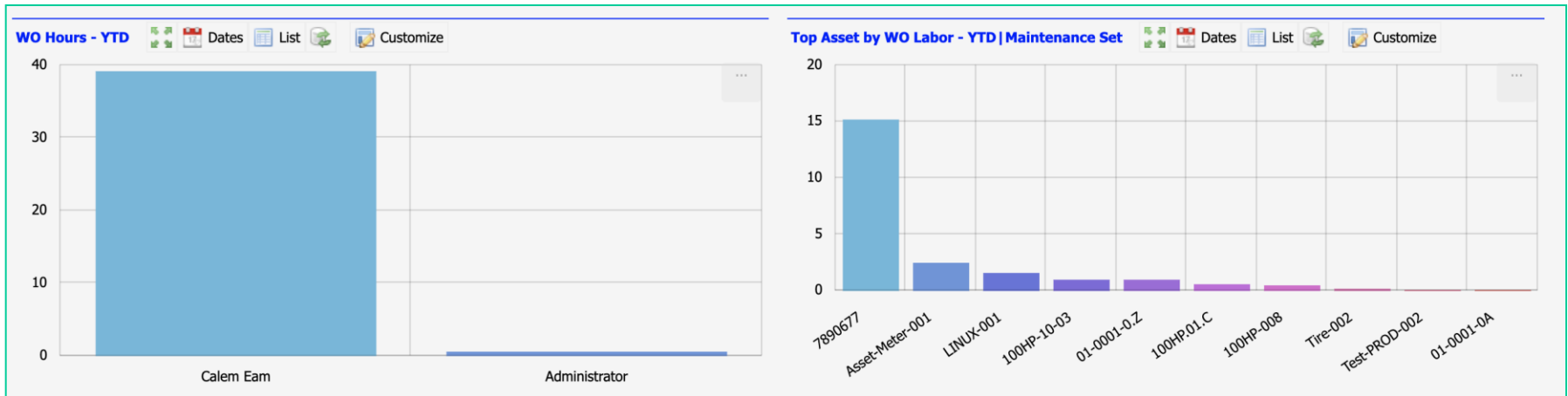- **Maintenance Planning Adherence (MPA)**
- **Maintenance Scheduling Adherence (MSA)**

Product – WO P & S

- Top Labor Hours spent by user and asset
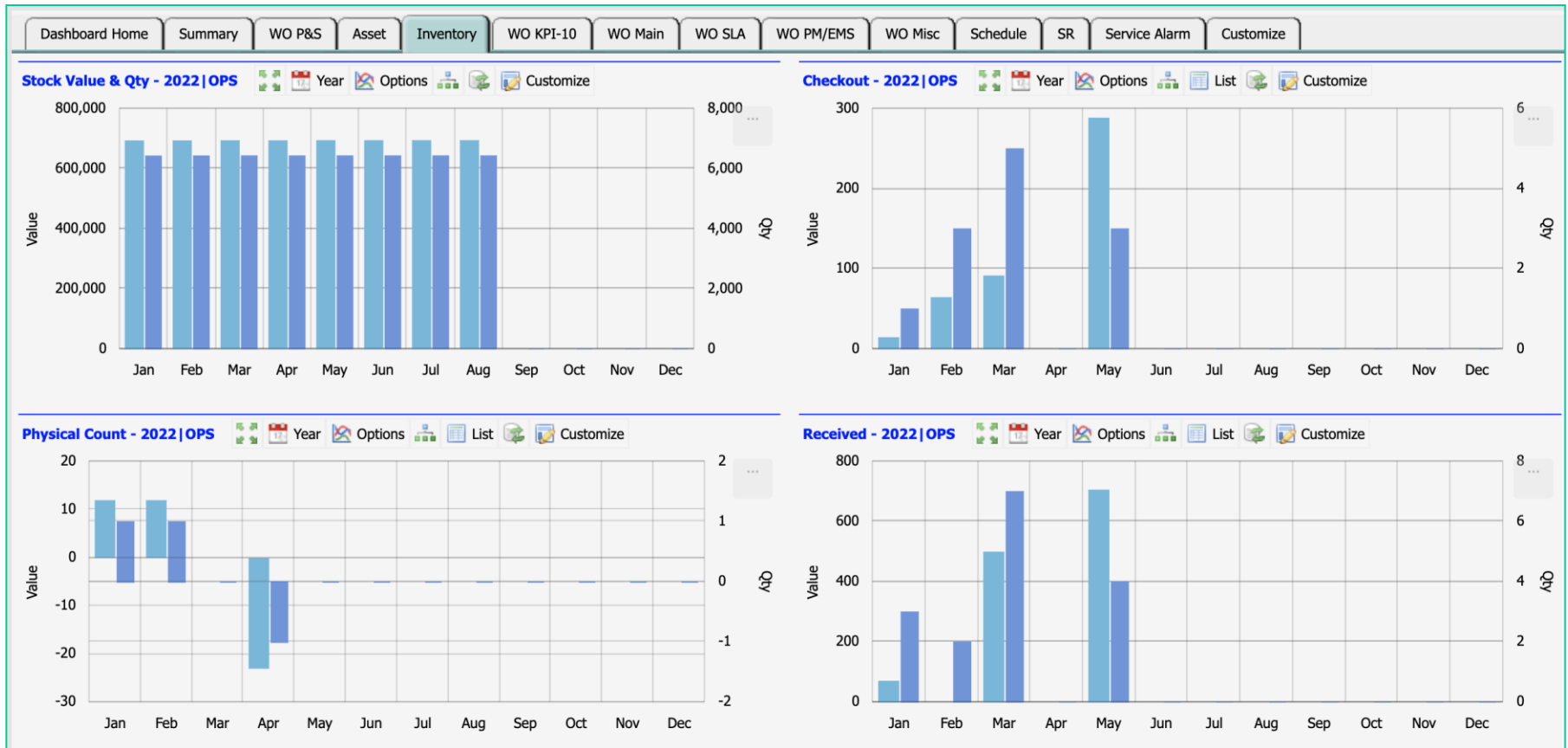
Product – Asset KPI

- Filter by Asset Classes
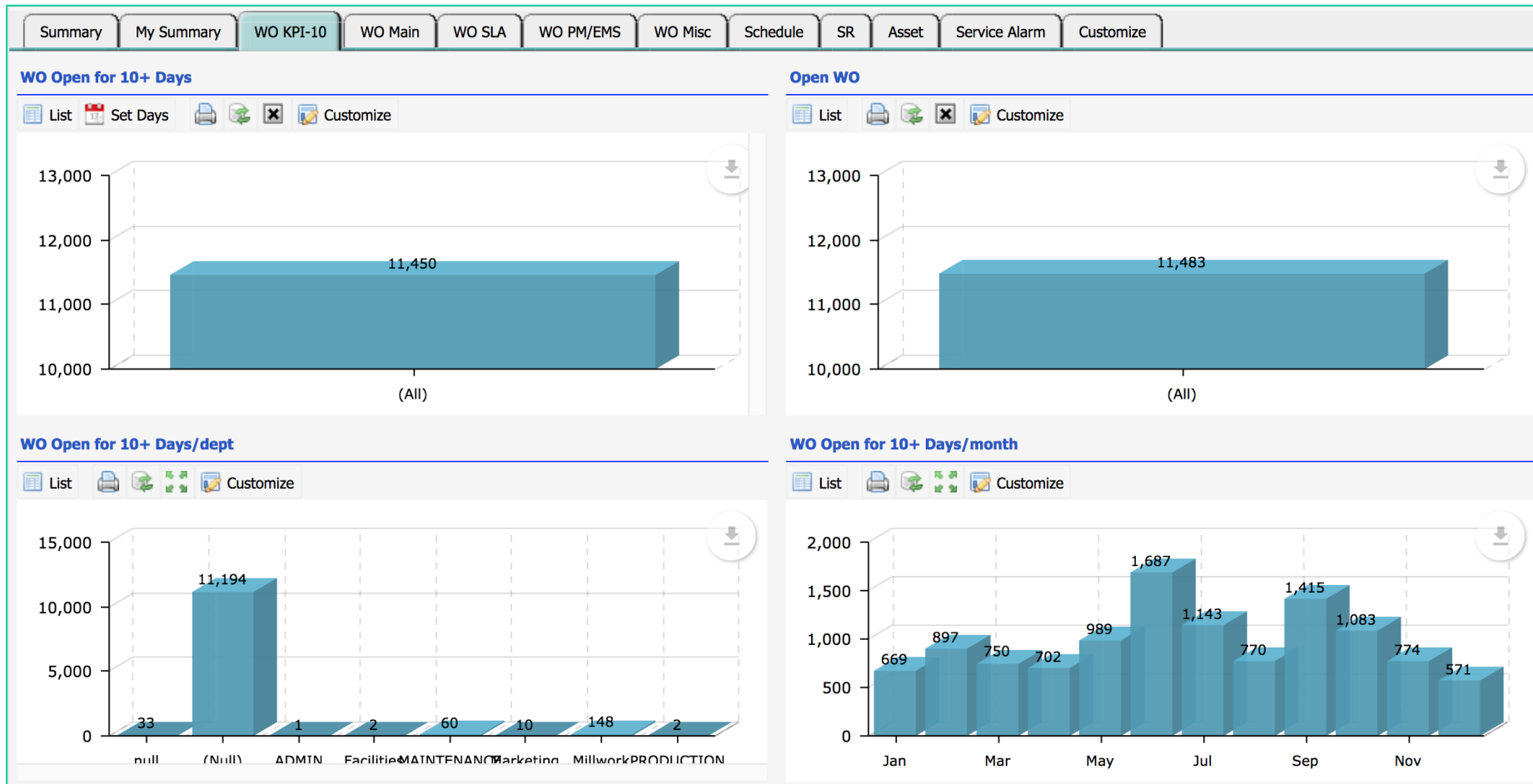- Filter by Dates

Product – Inventory KPI

- Mulit-Site ready
- Date and options filtering

WO LogBook

- Comments and status changes in work orders by previous days/shifts
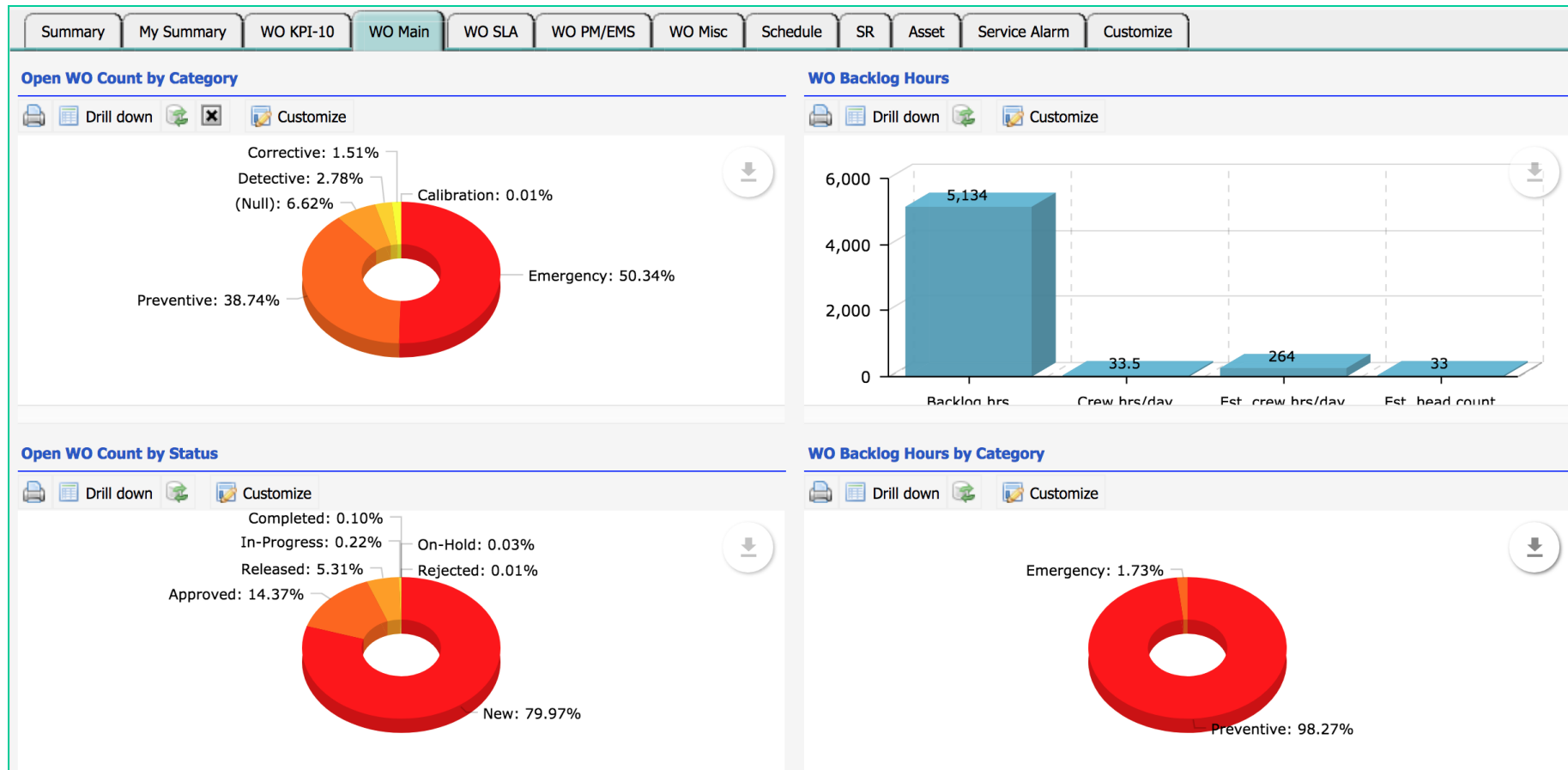- It is the digital form of the paper work order log book.

Wo #	Priority	Status	Subject	Comment	Asset Tag	Location	Comment time
			WO LogBook - Last 100 Day(s) (17)				
			Set Days/Range	Customize			
150958	P1	Completed	My sub		0911-2345		
151637	P2	Completed	summary		100HP-004	B02.HQ	
149638	P1	Completed	test			B07.MyCA_Site1	
151129	P3	Completed	Test weekly schedule			B11.TX-M001	
151142	P1	Completed	Machine is too hot		100HP-011	CA.BuildingMain-0...	
131697	P3	Completed	Weekly PM test	test	401402-17	B02.HQ	9/15/18 4:53 PM...
131697	P3	Completed	Weekly PM test	test	401402-17	B02.HQ	5/16/18 3:02 PM...
151143	P1	Completed	d2		MySite-00269	B05.TestLoc	
143784	P4	Completed	PM_Weekly		401402-17	B02.HQ	
151272	P3	In-Progre...	Monthly parent	Cmt-01	HBE-TEST-002	B02.HQ	9/15/18 4:05 PM...
151271	P3	In-Progre...	Daily PM	test		B05.TestLoc	9/15/18 4:22 PM...
151088	P4	Completed	PM_Weekly	testing it	MySite-01544	B02.HQ	9/15/18 2:23 PM...

WO KPI 10

- Misc KPIs for work orders – review and select to monitor
- Parameters (Days | Months) can be adjusted

WO Main KPIs

WO Main shows KPIs of the current state of work orders

Dashboard – WO SLA
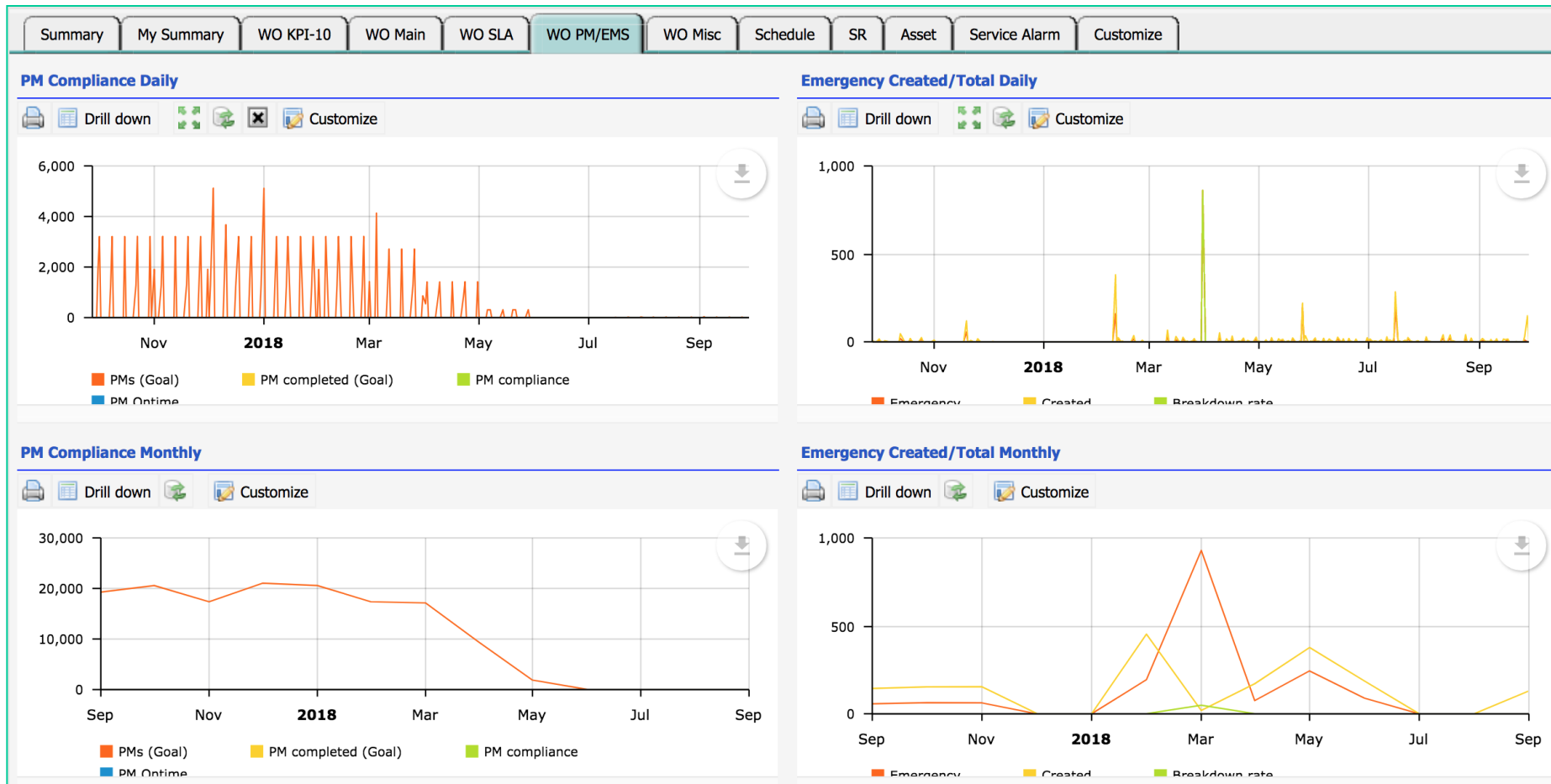
- Created/Completed: Daily/Monthly
- Scheduled/Completed: Daily/Monthly
- SLA/Completed: Daily/Monthly

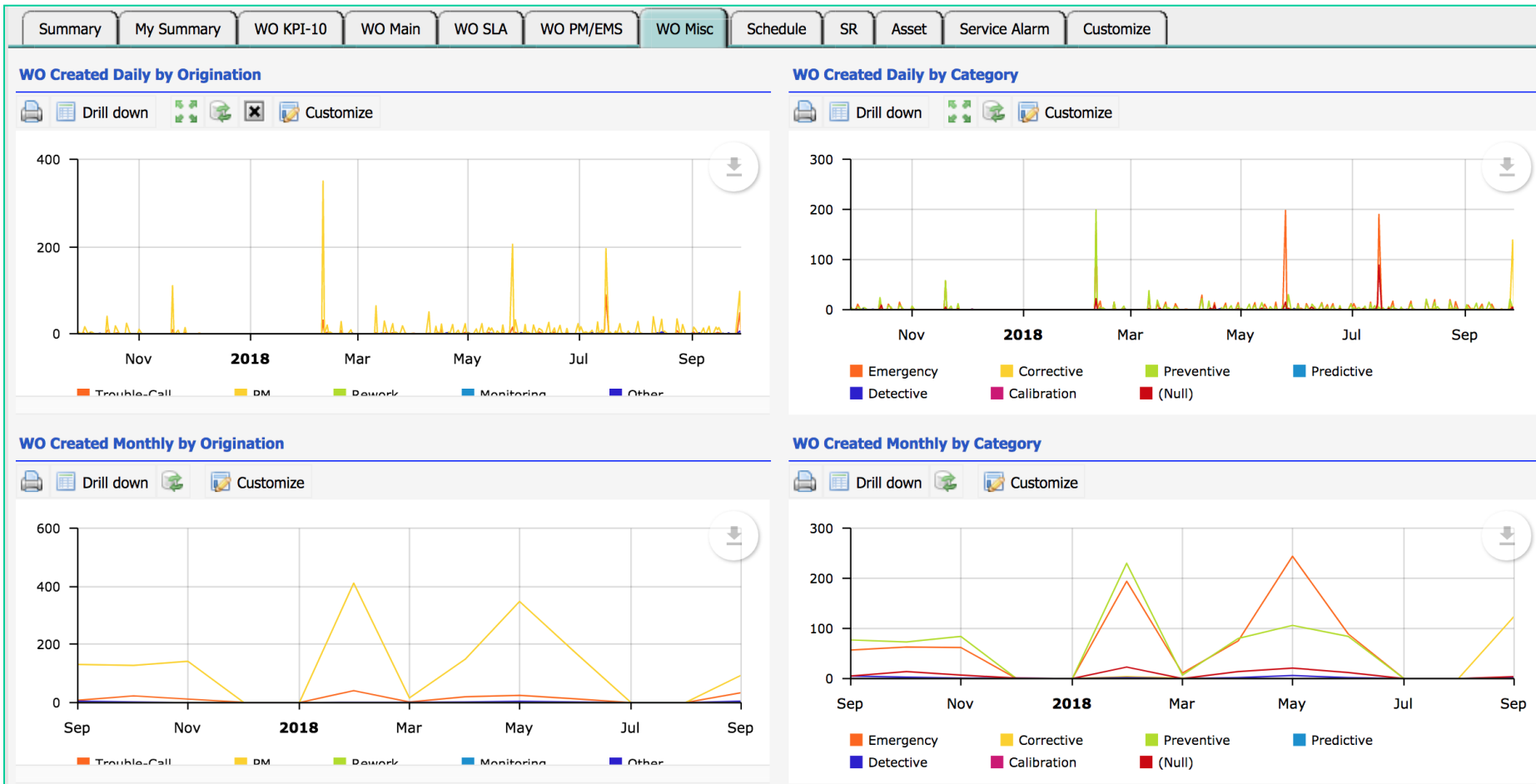# Dashboard – WO PM/Emergency

- PM Created/Completed: Daily/Monthly
- EMS Created/Total WO: Daily/Monthly
- EMS Created/Completed: Daily/Monthly

Dashboard – WO Misc

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- Created by Origin: Daily/Monthly
- Created by Category: Daily/Monthly

- Resource Scheduling:
    - Planned/Scheduled/Actual/Resource Total: Daily/Monthly
- Service Request:
    - Created/Completed: Daily/Monthly
- Service Alarms:
    - Alarm Summary by Site
    - Alarm Age by Type
    - Alarm Count by Status: Daily/Monthly

- WO Summary Monthly Chart to List Views
- WO Summary Multi-site Charts
- Change the year for WO Summary

Work Order and Asset Reports

- By date range
- By grouping

Analysis Module – WO Summary

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Work Order Summary by Grouping:

- WO Summary by type
- WO Summary by cost center
- WO Summary by dept
- WO Summary by assignment
- WO Summary by failure
- WO Summary by category
- WO Summary by origination
- WO Summary by asset
- WO Summary by asset categorization
- WO Summary by location
- WO Summary by site
- WO Summary by project

- WO Labor Summary by Users
- WO Actual Labor Summary By Grouping
  - User
  - Team
  - Dept
  - Site

Analysis Module – Asset Summary

Asset Summary by Site and the Following:

- Categorization
- Asset Item
- Priority
- Status
- Site
- Dept
- Cost Center
- Location
- Model
- Manufacturer
- Vendor

Analysis Module – Location Summary

Location Summary by Site and the Following:

- Categorization
- Location Group
- Priority
- Status
- Site
- Dept
- Cost Center
- Route

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WO Time to Complete & Meter Charts

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- Menu: Dashboard | Open
- Work order by category and time to complete
- Meter reading calendar: weekly reading excel presentation
- Meter reading chart: graph of meter readings

WO Time to Complete Edit > WO Time to Complete by Category List

WO Time to Complete by Category (3)

Customize

Category	Created	Completed	Closed	Avg Days to Complete	
Corrective	15	3		7	
Emergency	50	1		17	
Preventive	84	2		2.5	

Meter Calendar			From:	21-Sep-18		To:	28-Sep-18									
				21-Sep-18			22-Sep-18			23-Sep-18			24-Sep-18			
Tag number	Alarm value	Meter		Night	Morning	Afternoon	Night	Morning	Afternoon	Night	Morning	Afternoon	Night	Morning	Afternoon	

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Dashboard – Summary & My Summary

- Summary: data accessible to the login user
- My summary: data accessible & assigned to the login user
- Demo Dashboard

Summary	My Summary
WO Summary	My WO Summary
Change Summary	My Change Summary
WO Completed	My WO Completed
WO In-Process	My WO In-Process
Weekly Progress	My Weekly Progress
Daily Emergency	My Daily Emergency
Weekly Compliance	My Weekly Compliance