

# Part 3.2: Inventory Functions – DocProj

Calem Enterprise Training

Summer 2022

Austin, Texas



# What are the goals - Document

CalemEAM

## Goals

I know how to create a class tree for document

I know how to create a document entry

I know how to upload a file

I know how to create a URL

# What are the goals - Project

CalemEAM

## Goals

I know how to create a project

I know how to create a project task

I know how to create a work order for a project

# What are the goals - Training

CalemEAM

## Goals

I know how to set up a training

I know how to record user trainings

# What are the goals - Integration

CalemEAM

## Goals

I know how to prepare an excel file for upload

I know how to upload an excel file

I know where to find upload history

# What are the goals - Favorite

CalemEAM

## Goals

I know how to set up Home screen layout by group

I know how to set up Home screen default search by group

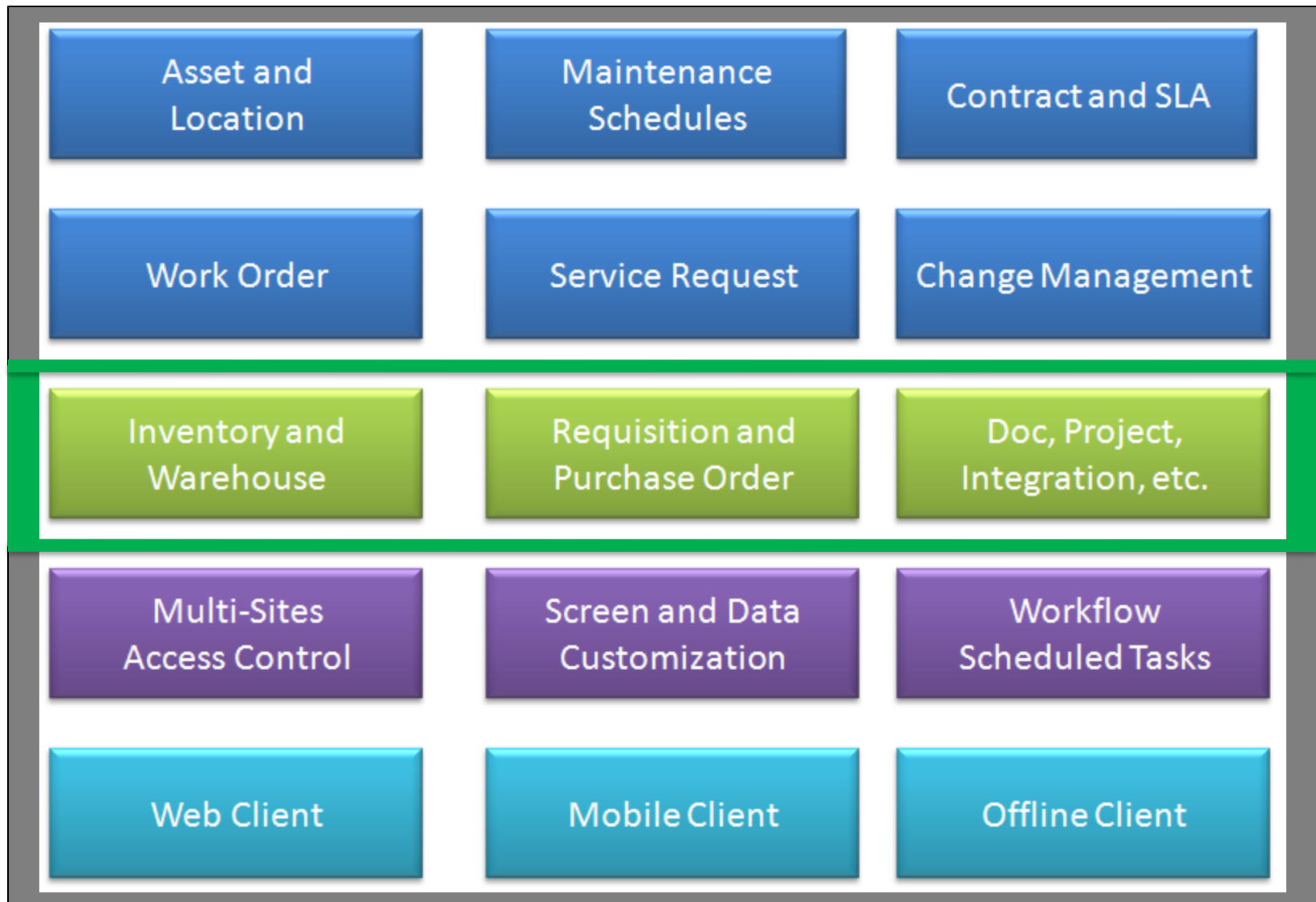
Inventory and  
Warehouse

Requisition and  
Purchase Order

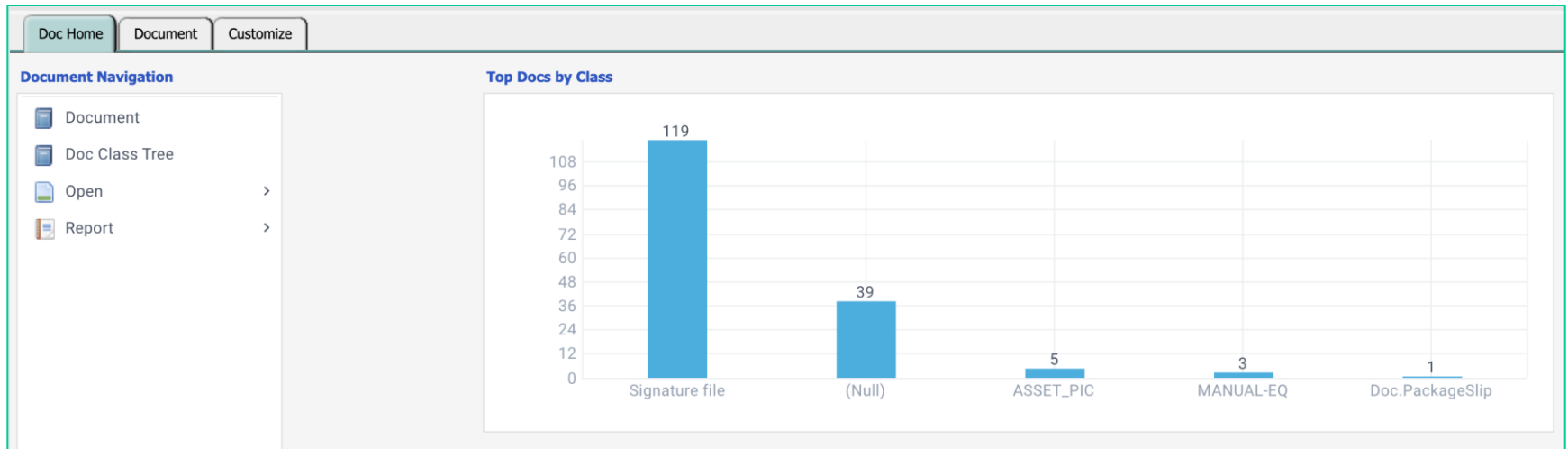
Doc, Project,  
Integration, etc.

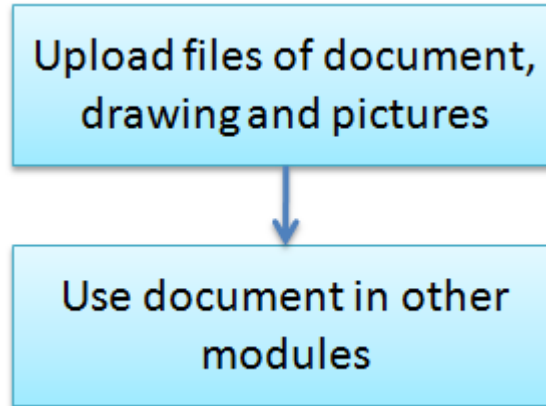
# Product Overview – Functions

CalemEAM












# Document Module – Doc Type


CalemEAM

- Use Doc Type to auto-number docs
  - MANUAL-%04d: MANUAL-0001, MANUAL-0002, ...


[Doc type List](#) > Doc type Create

**Doc type**

 Save  Cancel  Customize

 Ready to save changes.

---

**Doc type:**  User Manuals

**Note:**

**Doc pattern:**

**Doc seq:**




# Document Module – Creation


CalemEAM

- Document: auto-generated by Calem if left Empty
- Select a file to upload
- Access Type: Public/App
- Site Access; Custom Scale in WO Print

[Document list List](#) > Document Create

**Document**


 Save  Cancel  Customize

 Ready to save changes.

---


**Document:**

**Note:**

**Doc type:**  

**File:**  No file chosen

**Access type:**

**Owner site:**  

**Site access?:** ☐

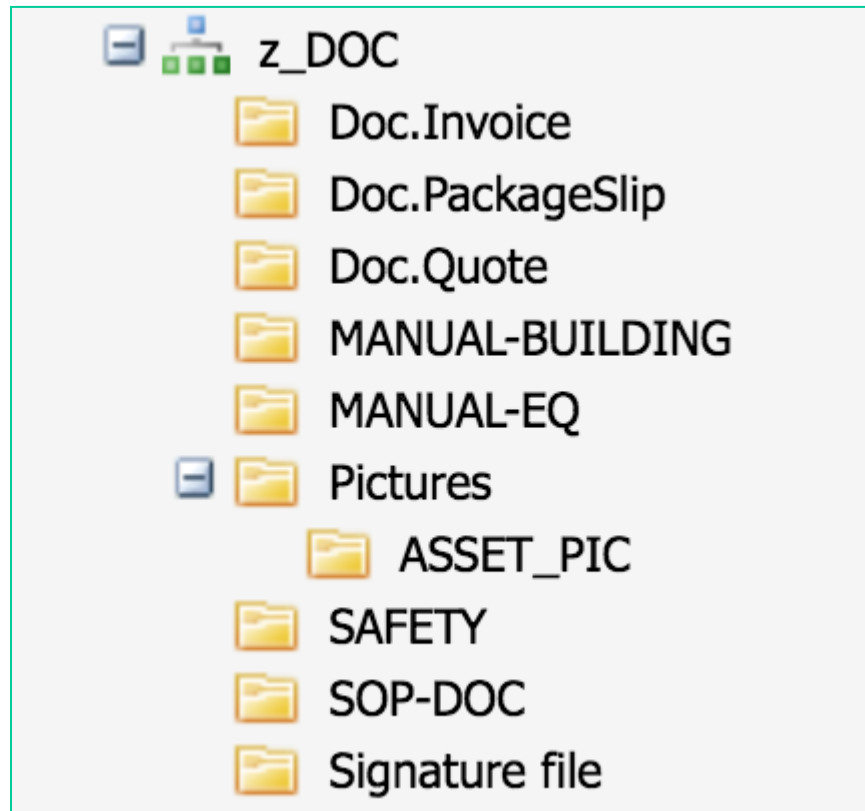
**URL:**

**Content:**

**Print scale:**

**Custom scale(%):**

- Document Class Tree



# Document Module – Site Access Control

CalemEAM

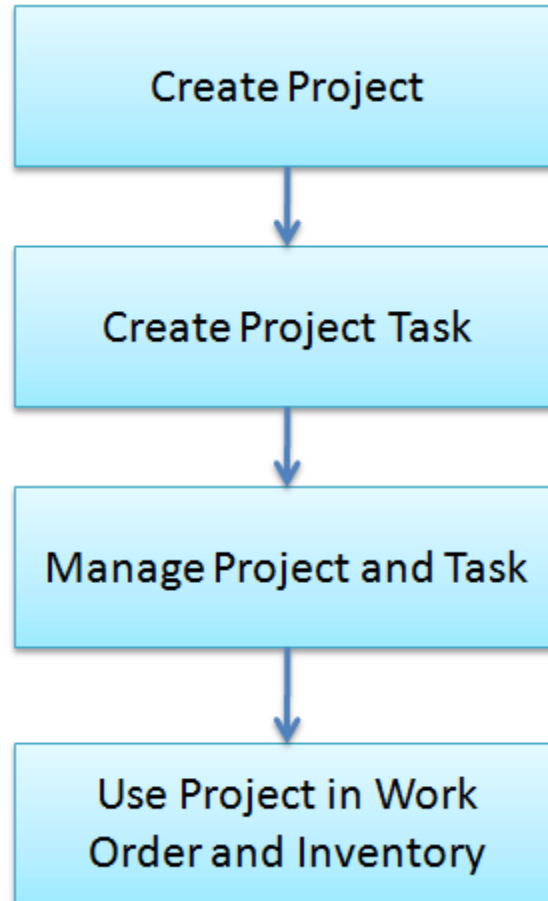
- Site-based Access Control

Doc site (7)							
Customize							
<input type="checkbox"/>	#	Document	Doc note	File	Site	Note	Last modified
<input type="checkbox"/>	1	Doc-site-2			MySite		10/8/12 9:34 P...
<input type="checkbox"/>	2	SAMPLE-DOC-001	Sample image for in-place dis...	folder_blue.png	StyleBeds.CA		10/8/12 9:01 P...
<input type="checkbox"/>	3	URL testing 001	URL test	PHPEXcel Function Refer...	My TX site	test	10/8/12 9:00 P...
<input type="checkbox"/>	4	Doc-site-2			JJ.CA	Owner site added by Calem	1/7/12 1:56 PM...
<input type="checkbox"/>	5	Site-Doc-Test			JJ.Austin	Owner site added by Calem	1/7/12 1:56 PM...
<input type="checkbox"/>	6	URL testing 002			MySite_CA		2/26/11 5:24 P...
<input type="checkbox"/>	7	SAMPLE-DOC-001	Sample image for in-place dis...	folder_blue.png	MySite	testing	2/26/11 5:18 P...

- Add a document
- Add a document with URL
- Use a document in PM Plan







# Project Module - Creation

CalemEAM

- Set Project, Site
- Set Customer Site or Customer if applicable

[Project list List](#) > Project Create

**Project**

Save Cancel Customize

Value is required: Project

---

**Project:**

**Note:**

**Status:**

**Priority:**

**Proj. type:**

**Owner:**

**Site:**

**Comment:**

**Sched start:**  At:  Central

**Schedule end:**  At:  Central

**Codes**

**Dept:**

**Account:**

**Enter customer site or customer if applicable**

**Customer site:**

**Customer:**

- **Add Tasks to Project**

Main
Task
WO
BOM
Customize

Project (1 of 4)

Project: Converter Shutdown

Note:

Tasks (14)

<input type="checkbox"/>	#	Task	Parent task	Note	Status	Priority	Site	Owner	Sched start	% done	Last modified
<input type="checkbox"/>	1	Sub-001-A	1b - Task 1b		New	P1	MySite				8/31/15 4:...
<input type="checkbox"/>	2	1b - Task 1b		Task 1b	Hold	P4	MySite	Ben Manning			3/4/11 12:...
<input type="checkbox"/>	3	TSK-001			New	P1	JJ.Austin				10/22/15 1...
<input type="checkbox"/>	4	TT-001			New	P1	JJ.Austin				10/22/15 4...
<input type="checkbox"/>	5	My-task-new-01			New	P1	MySite				3/4/11 11:...






# Project Module – Project WO


CalemEAM

- Add WO to Project; or Project Task

MainTaskWOBOMCustomize






**Project (1 of 4)**

 Customize

**Project:**  Converter Shutdown

**Note:**

**Work Order (7)**

 Customize

#	Wo #	Asset #	Location	Status	Subject	Last modified
1	8780	100HP-3	OFFICE.IT	Closed	Sub	2/5/16 2:01 PM ...
2	13279	200-001	B02.HQ	Closed	PM_Weekly	2/5/16 2:01 PM ...
3	13200	100HP-004	B02.HQ	Released	Freq by days	4/1/16 11:19 A...
4	8387	100HP-3	OFFICE.IT	In-process	Subject - RēD (速大)	4/1/16 11:21 A...
5	9519	100HP-3	OFFICE.IT	Released		4/1/16 11:21 A...
6	98296	forum_998	OFFICE.IT	New	PJ WO	2/5/16 2:01 PM ...
7	98297	forum_998	OFFICE.IT	New	Task WO	2/5/16 2:01 PM ...

# Project Module – Project BOM

CalemEAM

- Add Bill of Material to Project
- Use Project in REQ with BOM

**Project (1 of 4)**

Project: Converter Shutdown

Note:

**Project BOM (1)**

	#	Item	Note	Last modified	
<input type="checkbox"/>	1	01-01-0001A		4/19/16 8:03 PM ...	

# Project Module – Project Task

CalemEAM

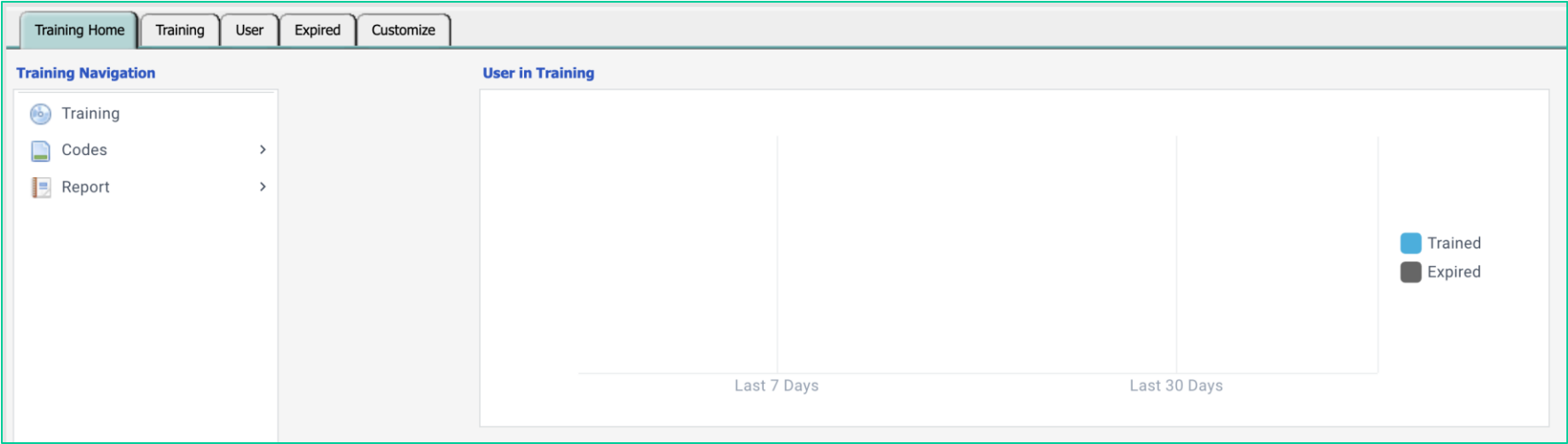
- Project Task can have child Tasks
- Project Task can have work orders

<div>Main Task WO Customize</div>			
Task (3 of 32)			
<div>     Customize</div>			
Task:  Sub-001-A		Note:	
Project: <a href="#">Converter Shutdown</a>		Parent task: <a href="#">1b - Task 1b</a>	
Status: New		Site: <a href="#">MySite</a>	
Priority: P1		Task type:	
Owner:			
Sched start:		Schedule end:	
Actual start:		Actual end:	
Sched. hrs:		Actual hrs:	
Days sched.:		Days actual:	
% done:			
Milestone?: <input type="checkbox"/>			

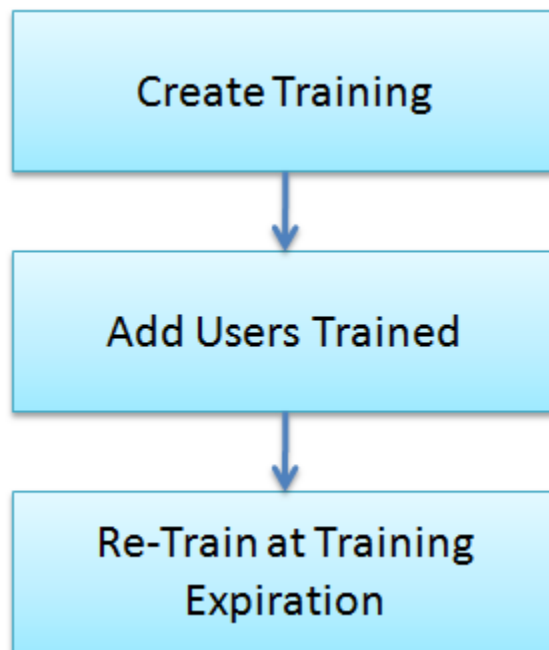
# Project Module – Hands-On Lab

CalemEAM

- Create a project
- Create a project task
- Create a WO for the project










# Training Module – Creation


CalemEAM


- Set Training, Site, Course
- Set Expiration for re-training



[Training list List](#) > Training Create



**Training**


 Save  Cancel  Customize




 Value is required: Training




**Training:** 


**Site:**   


**Course:**   

**Instructor user:**  

**Start time:**    At:   Central

**End time:**    At:   Central

**Certificate:**  

**Expiration:**  

**Description:**






# Training Module – Add Users


CalemEAM


- Add users to training


MainUserCustomize





Training (1 of 6)

Customize

Training:  MyTRN-001

Site:  [ATL](#)

 Training user (2)








Customize

<input type="checkbox"/>	#	Full name	Status	Comment
<input type="checkbox"/>	1	Ben Manning	Complete	
<input type="checkbox"/>	2	IT BENCHSTOCK	Complete	

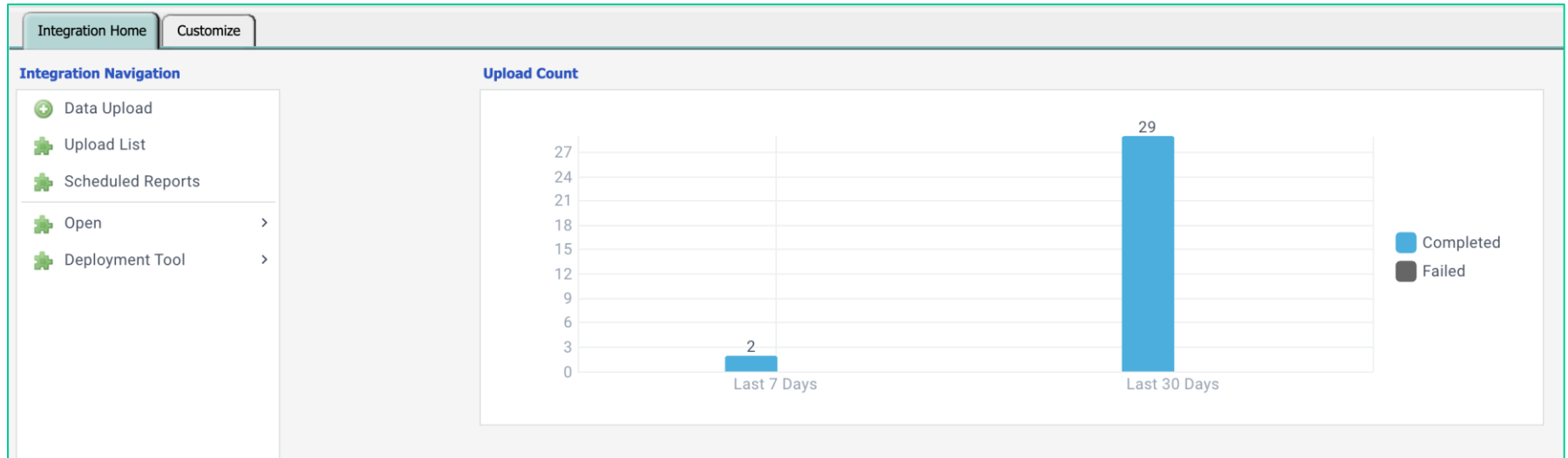
# Training Module – Expiration Report

CalemEAM

- User Training Expiration Report

<input type="text"/>							
Training Expiration (5)							
       Customize							
Full name	Training	Course	Status	Certificate	Expiration	Start time	Site
Ben Manning	MyTRN-001	Chess tournament	Complete	Cert	9/17/12	4/20/12 12:00 AM...	ATL
IT BENCHSTOCK	MyTRN-001	Chess tournament	Complete	Cert	9/17/12	4/20/12 12:00 AM...	ATL
Vendor Test001	test		Complete	Cert	9/12/12	1/20/12 12:00 AM...	MySite
Ben Manning	Westwood San An...	Chess tournament	Complete	Cert	4/2/12	2/2/09 12:00 AM C..	MySite
Clay Li	Westwood San An...	Chess tournament	Complete	Cert	4/2/12	2/2/09 12:00 AM C..	MySite

- Create a training
- Add a user to the training







# Integration Module – Upload Data


CalemEAM

- Excel Templates from <https://eam.calemeam.com/index.php/training>
- See “**Calem Enterprise Data Upload Guide**” for more info.
- The module is only for admin users

**Data Upload**

 Save  Cancel  Customize

 Ready to save changes.

**File:**   No file chosen

**Note:**

# Integration Module – Scheduled Report

CalemEAM

- Select a report
- Set Next Due and Schedule
- Set Date Range
- Set Locale

[Sched Reports List](#) > Sched Report Create

**Sched Report**

Save Cancel Customize

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

**Report:**

**Note:**

**Owner site:**

**Profile:**

**Schedule**

**Next due:**

☐ Weekly ☐ Sun ☐ Mon ☐ Tue ☐ Wed ☐ Thur ☐ Fri ☐ Sat

☐ Every  weeks on

☒ Every  months on

☒ Day of week

☐ Day of month

☐ Every  days

Start from:  Until:

**Date range (Disabled if not supported)**

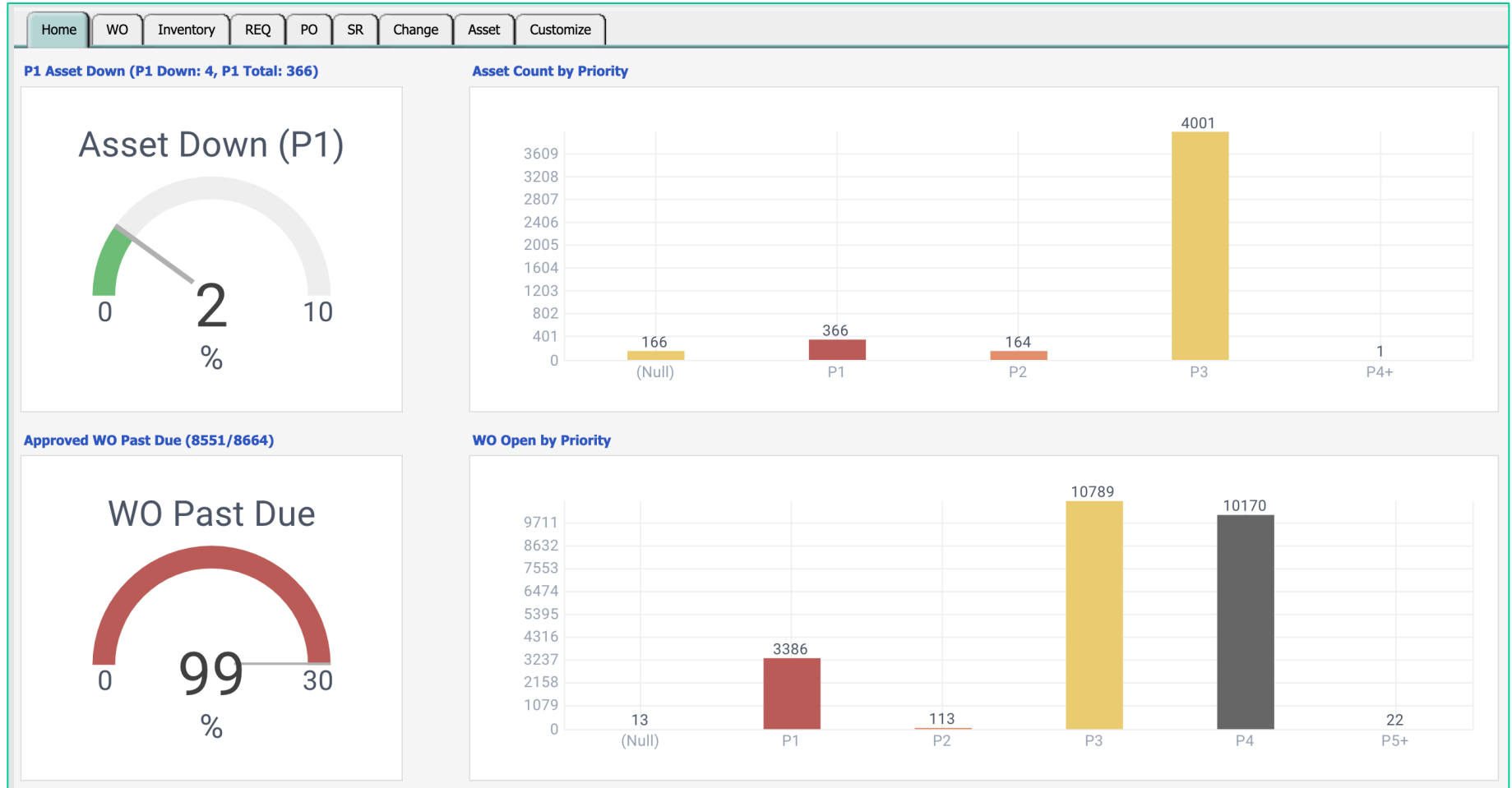
**Date Range?:** ☐

**Report range:**

**Range count:**

**Locale:**





# Favorite Module

CalemEAM

- Home Form layout per User Group
- Default search per User Group

WOInventoryREQPOSRChangeCustomize

Open WOs (10502)

Customize

Wo #	Asset Tag	Location	Priority	Status	Flag	Assigned to	Subject
134880	MySite-04204	B05.TestLoc	P4	New		Calem Eam	PM_We
134881	MySite-04204	B05.TestLoc	P4	New		Calem Eam	PM_We
134882	MySite-04204	B05.TestLoc	P4	New		Calem Eam	PM_We
134883	MySite-04204	B05.TestLoc	P4	New		Calem Eam	PM_We
134884	MySite-04204	B05.TestLoc	P4	New		Calem Eam	PM_We
134876	401402-17	B02.HQ	P3	Approved			Weekly
134877	233-455-901	B02.HQ	P3	Approved			Weekly
134878	MySite-04204	B05.TestLoc	P4	New		Calem Eam	

Assets 1 (4449)

Customize

Asset Tag	Status	Priority	Location	Site	Asset g
My-asset-01	Scrapped	Production	B08.MyLoc-1000	MySite	Building
DELL-SVR-0004 TT	In service	Critical	CA.Building2	My TX site	DELL-SE
MySite-06591	In service	Critical	B01.Lobby	MySite	AS-SHIF
SHIP-TEST-001	In service	Critical	B06.ParentLoc	MySite	AS-SHIF
JJ.CA.AC-001	In service	Critical	OH-CA-001	JJ.CA	Building
A004670	In service	Critical	HQ.001	StyleBeds.CA	
SP02-M-PORT	In service	Critical	CA.Building2	My TX site	MERCUR
HTF-00012	In service	Production	B05.TestLoc	MySite	FNCODI

My Assignment (0)

Customize

Wo #	Asset Tag	Location	Priority	Status	Flag	Assigned to	Subject
No results found.							

My Team WO (0)

Customize

Wo #	Asset Tag	Location	Priority	Status	Flag	Assigned to	Subject
No results found.							

## Hands-on

- Home form customization
- <http://www.calemeam.com/calemcustomers-2/maximize-productivity-with-home-form>

**Thank You for Attending  
the CalemEAM Training!**  
**Visit Us at [www.calemeam.com](http://www.calemeam.com)**



- **Import Locations via the Excel Template at Training Section of Calem Site**
- **Import Global Items**
- **Import Site Inventory**
- **Import Physical Counts**

# Integration Module – Batch Upload

CalemEAM

- Transfer excel file to Calem Server
- Calem will upload data automatically

- History list of uploaded files
- Offline Client Payment Integration with PayPal
  - Merchant List
  - Paid Invoices
  - See **Admin Guide of Calem Offline for Android**

- Offshore Vessel Data Collection and Upload by Excel Files
  - Meter Readings
  - Work Orders Created
  - Work Orders Updated
  - Work Orders Completed
  - Items to Requisition
  - Items Received
- See “**CalemEAM\_ASC\_Integration\_Guide.pdf**”