

# Part 4.0: System Functions – Multi-Site/ACL Profile

## Calem Enterprise Training

Summer 2022

Austin, Texas



# What are the goals – Multi-Site/ACL

CalemEAM

## Goals

I know how to set up EAM Sites

I know how to set up Vendor | Manufacturer Sites

I know how to set up Customer Sites

I know how to set up ACL Profiles

I know how to assign site access to ACL Profiles

I know how to set up Read-Only Profiles

I know how to set up monitor roles

I know how to set up email notification filtering

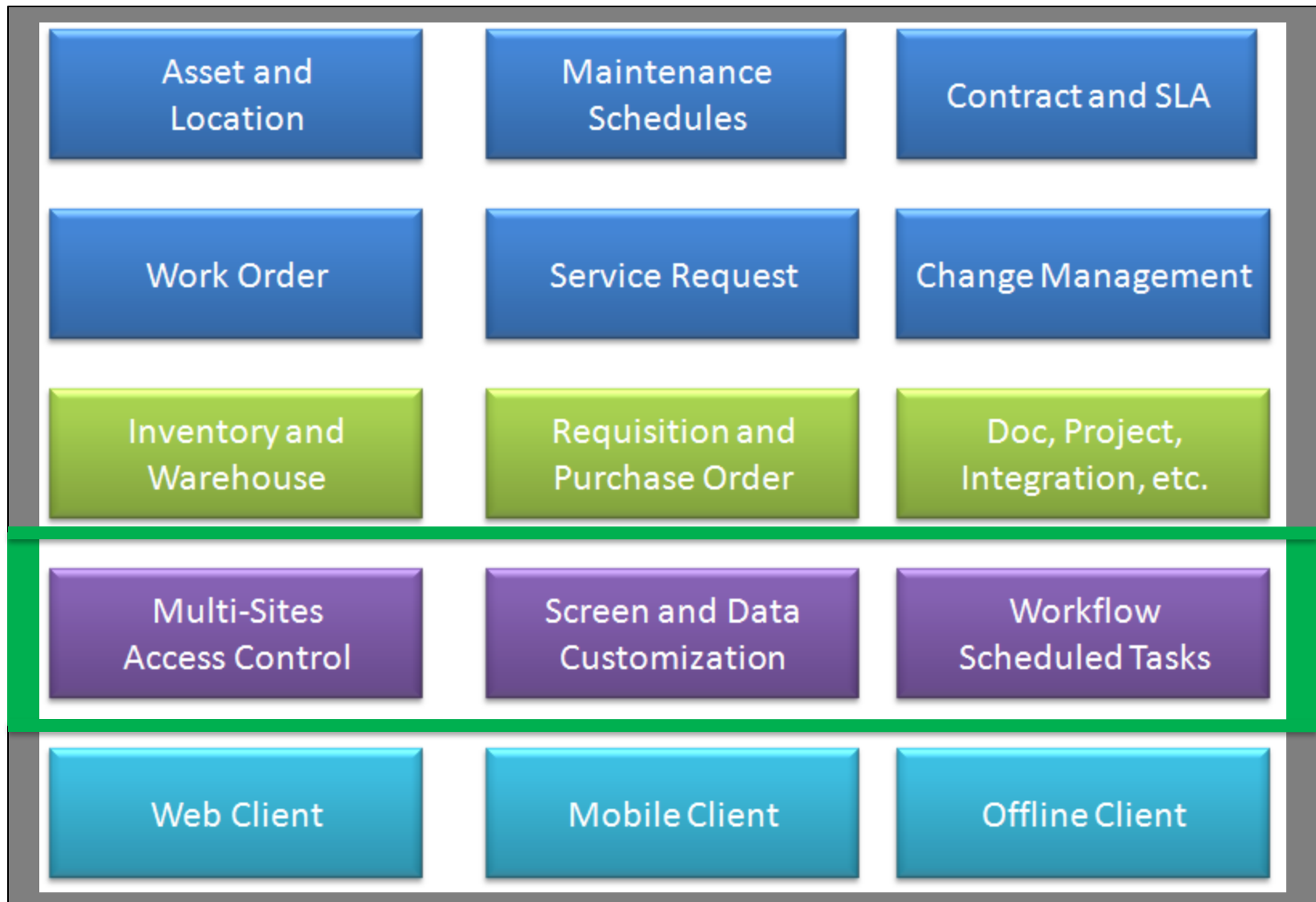
Multi-Site  
Access Control

Screen & Data  
Customization

Workflow  
ScheduledTasks

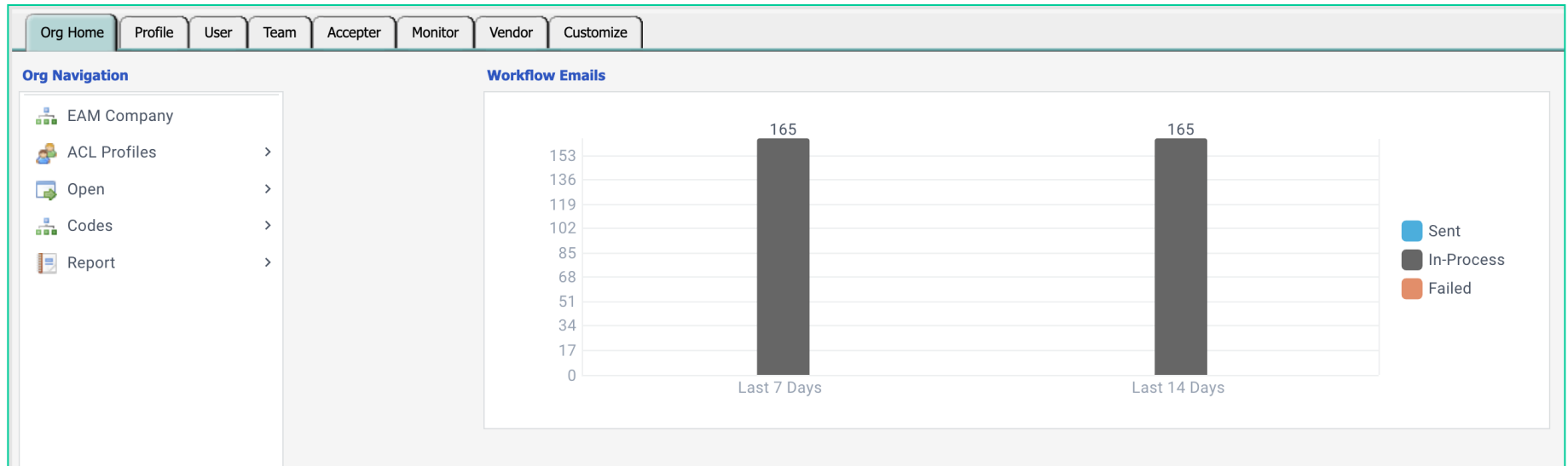
# Product Overview – Functions

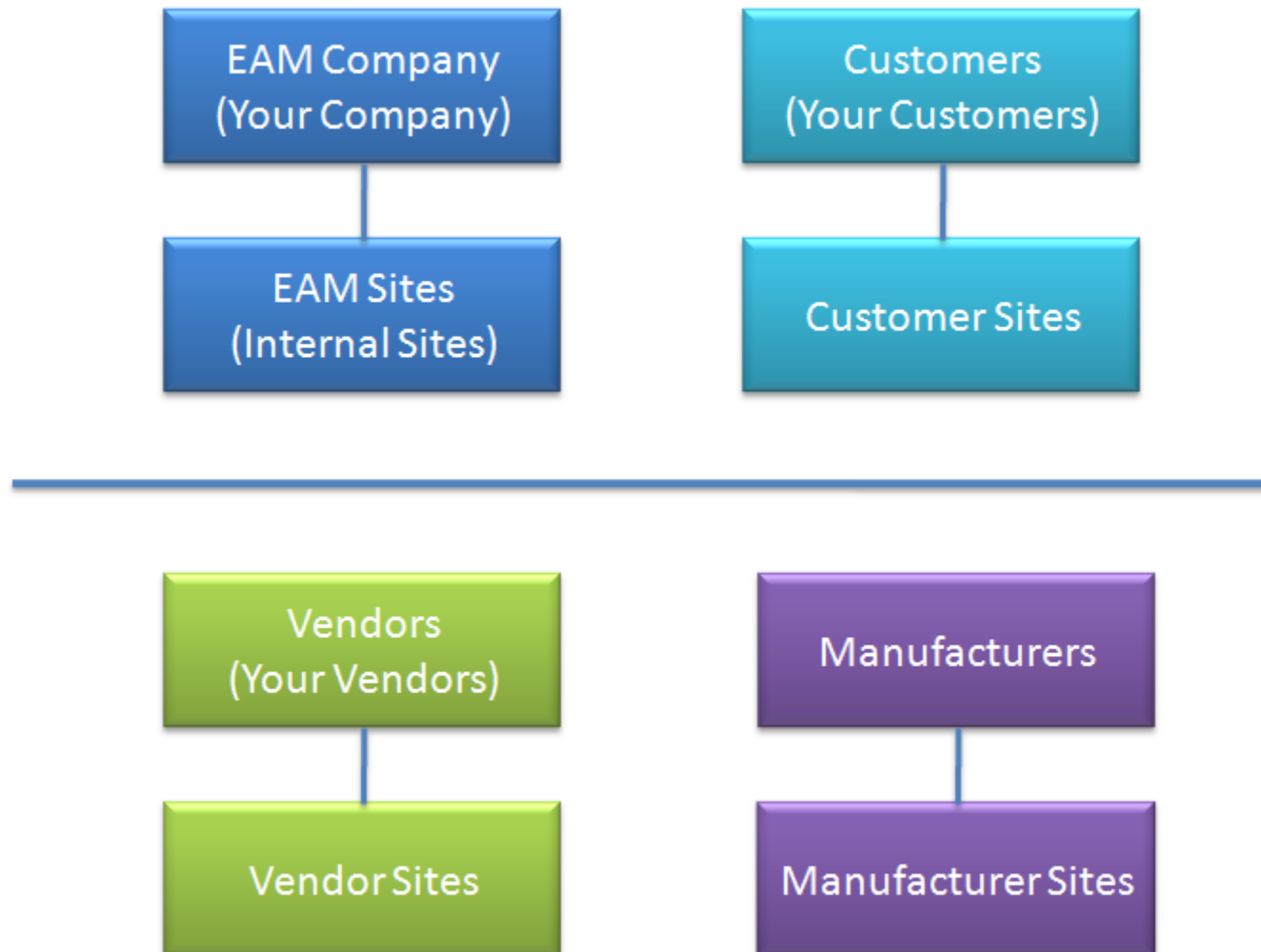
CalemEAM



# Product – Multi-Organization

CalemEAM





	Asset Sites	Service Sites	Inventory Sites	PO Sites
Your Sites	X	X	X	X
Customer Sites	X		X	
Vendor Sites		X		
Manufacturer Sites				

- Your Sites: internal sites of your company
- Customer Sites – you maintain the assets for your customers
- Vendor Sites – your parts and service providers
- Manufacturer Sites – the manufacturers for your assets and inventory

# Multi-Sites – Your Company

CalemEAM





- Your Company and Configuration


Main	Site	Employee	Job Role	Opt-Out	Address	Doc	Customize
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**EAM Company (1 of 1)**

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     Customize

**Company:**  CalemEAM Inc.

**Alias:**

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**Note:**

**Contact:** [Calem Eam](#)

**Comment:**

**PO term:**

**Address:**



# Multi-Sites – Company Defaults

CalemEAM

- Boilerplate Steps for CM/PM Work Orders
- Default SLA Contract
- Default TimeZone, Locale
- Tech Photo in Assignment Notification

## WO Default Steps

CM Plan?: ☐

PM Plan?: ☒

SLA contract?: ☐

Time Zone:

No tech photo: ☐

CM Plan:

PM Plan: [BOILER-001](#)

SLA contract:

Locale:

# EAM Company – Sites

CalemEAM

- A site is a regional office, a facility, or a clinic
- Manage as many sites as needed

MainSiteEmployeeJob RoleOpt-OutAddressDocCustomize

EAM Company (1 of 1)

Customize

Company: 

CalemEAM Inc.

Alias:

EAM Site (8)






Customize

<input type="checkbox"/>	#	Site	Note	Service site	PO site	Inventory site	Last modified
<input type="checkbox"/>	1	FARADAY	My company	FARADAY	FARADAY	FARADAY	2/17/16 4:47 PM C...
<input type="checkbox"/>	2	KRT-New	My company	KRT-New	KRT-New	KRT-New	2/15/16 4:49 PM C...
<input type="checkbox"/>	3	My-Site-001	My company	My-Site-001	My-Site-001	My-Site-001	4/13/16 1:25 PM C...
<input type="checkbox"/>	4	MySite		MySite	MySite	MySite	4/13/16 1:24 PM C...
<input type="checkbox"/>	5	MySite_CA	EAM company CA site.	MySite_CA	MySite_CA	MySite_CA	6/2/15 3:04 PM Ce...
<input type="checkbox"/>	6	s-001	My company	s-001	s-001	MySite	2/15/16 4:49 PM C...
<input type="checkbox"/>	7	SiteA	My company	SiteA	SiteA	SiteA	2/15/16 4:49 PM C...
<input type="checkbox"/>	8	TX_MySite	My company	TX_MySite	TX_MySite	TX_MySite	2/22/16 3:29 PM C...

# EAM Company – Employees

CalemEAM

- Users of your organization
- Reserved: “**admin**”/system use; “**calem\_api**”/API use

Main Site Employee Job Role Opt-Out Address Doc Customize										
EAM Company (1 of 1)										
 Customize										
Company:  CalemEAM Inc.										
Alias: <input type="text"/>										
<input type="text"/>  Employee (28)										
 Job roles  Customize										
<input type="checkbox"/>	#	Full name	User name	Job role	Is EAM crew?	Note	Status	Team	Site	Last modified
<input type="checkbox"/>	1	Administrator	admin	ELEC-L2	<input checked="" type="checkbox"/>		Active	MyCA_Team1	MySite	4/20/16 10:33 ..
<input type="checkbox"/>	2	Anonymous	anonymous		<input type="checkbox"/>				MySite	4/18/16 6:16 A..
<input type="checkbox"/>	3	API	calem_api		<input type="checkbox"/>				MySite	7/19/14 8:58 A..
<input type="checkbox"/>	4	Calem Eam	calem	ELEC-L2	<input checked="" type="checkbox"/>			MyTeam2	MySite	4/20/16 11:37 ..
<input type="checkbox"/>	5	Calem Test (no Log...	u011	002	<input checked="" type="checkbox"/>		Active	Network.Team	MySite	4/4/15 10:12 P..
<input type="checkbox"/>	6	Calem Test-A	u013	004	<input type="checkbox"/>		Active	My_Team2	MySite	1/11/16 3:32 P..
<input type="checkbox"/>	7	Calem Test2 (no Lo...	u012	006	<input type="checkbox"/>		Inactive	MyCA_Team1	MySite	1/11/16 3:32 P..
<input type="checkbox"/>	8	Clay Li	cli	ELEC-L2	<input checked="" type="checkbox"/>	LDAP user	Active		s-001	9/4/13 4:54 P...
<input type="checkbox"/>	9	Dan	u542	011	<input checked="" type="checkbox"/>		Active		MySite	1/11/16 2:24 P..
<input type="checkbox"/>	10	IT BENCHSTOCK		ELEC-L2	<input checked="" type="checkbox"/>				MySite	9/4/13 4:55 P...
<input type="checkbox"/>	11	Jack Greener	jgreen	Network.Tech	<input checked="" type="checkbox"/>	LDAP user 1	Active	Network.Team	MySite	2/29/16 3:14 P..
<input type="checkbox"/>	12	Jason Bennett	u828	Millwork	<input type="checkbox"/>			MyCA_Team1	MySite	1/11/16 3:32 P..
<input type="checkbox"/>	13	John Freeman	jfreeman	IT.Security	<input checked="" type="checkbox"/>		Active	Network.Team	MySite	11/11/15 9:40 ..

- Job Role (Craft code)

MainSiteEmployeeJob RoleOpt-OutAddressDocCustomize

EAM Company (1 of 1)

Customize

Company: 

CalemEAM Inc.

Alias:

Job role (22)

Users

Customize

<input type="checkbox"/>	#	Job role	Rate (USD)	Note	Last modified
<input type="checkbox"/>	15	Millwork	20.00		7/11/15 6:52 PM Ce..
<input type="checkbox"/>	16	My Job	85.00		4/29/10 7:56 AM Ce..
<input type="checkbox"/>	17	Network.Tech	40.00	Network technician	4/29/10 7:35 AM Ce..
<input type="checkbox"/>	18	Tech.CAD	80.50		4/30/10 1:21 PM Ce..
<input type="checkbox"/>	19	Tech.Computer	92.00		4/29/10 8:58 AM Ce..
<input type="checkbox"/>	20	TECH.NET	30.00		4/29/10 7:57 AM Ce..
<input type="checkbox"/>	21	Test_001	23.00		4/29/10 8:39 AM Ce..

Job Role (Site) (2)

Customize

<input type="checkbox"/>	Site	Job role	Rate (USD)	Last modified
<input type="checkbox"/>	MySite	ELEC-L2	30.00	4/12/15 9:44 P...






# EAM Company – Opt-Out by Company


CalemEAM

- WO Email Opt-Out by Category, Status, Priority

MainSiteEmployeeJob RoleOpt-OutAddressDocCustomize





**EAM Company (1 of 1)**

Customize

**Company:**  CalemEAM Inc.





**Alias:**

**WO Cat. Opt-out (1)**

Customize





<input type="checkbox"/>	#	Category	Modified by	Last modified	
<input type="checkbox"/>	1	Preventive	Calem Eam	2/25/12 1:43 PM ...	

**WO Status Opt-out (0)**

Customize

<input type="checkbox"/>	#	Status	Modified by	Last modified	
--------------------------	---	--------	-------------	---------------	--

**WO Priority Opt-out (1)**

Customize

<input type="checkbox"/>	#	Priority	Modified by	Last modified	
<input type="checkbox"/>	1	P5	Calem Eam	6/14/14 8:08 PM Ce...	

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# EAM Company – Addresses

CalemEAM

MainSiteEmployeeJob RoleOpt-OutAddressDocCustomize

EAM Company (1 of 1)

Customize

Company: 

CalemEAM Inc.

Alias:

Address (3)

Customize

<input type="checkbox"/>	Address	Note	Addr. type	Last modified
<input type="checkbox"/>	10012 San Jacinto Blvd, Austin, TX 78701		Other	10/19/13 5:10 A...
<input type="checkbox"/>	Acme Maintenance Services, Inc. Central Stor...		Shipping	2/13/10 12:51 A...
<input type="checkbox"/>	Acme Maintenance Services, Inc. 12391 San ...		Billing	2/13/10 12:52 A...

# EAM Company – Docs

# CalemEAM

Main	Site	Employee	Job Role	Opt-Out	Address	Doc	Customize
<b>EAM Company (1 of 1)</b>							
<div> </div>							
<b>Company:</b> <input type="text" value="CalemEAM Inc."/>							
<b>Alias:</b> <input type="text"/>							
<b>Documents (2)</b>							
<div> </div>							
<input type="checkbox"/>	Seq	Document	Note	Last modified			
<input type="checkbox"/>	10		My doc	12/17/12 7:07 ...			
<b>Attachment (0)</b>							
<div> </div>							
<input type="checkbox"/>	File	Note	Last modified				




# EAM Site – Creation


CalemEAM

- Set Site name
- Set Service request in email from the domain defined
- Default Tech for the site if any


[EAM Company](#) > EAM Site Create


**EAM Site**


 Save  Cancel  Customize


 Value is required: Site

---

**Site:** 

**Service site:**  

**Inventory site:**  


**PO site:**  


**Request in email:** ☒


**Email domain:**

**Charge rebuild use?:** ☐

**Allow negative stock?:** ☐




**Contact:**  

**Cost center:**  

**Default Tech:**  



- WO Terminal Status template for workflow notification
- Asset Pattern: Site based asset numbering
- WO Pattern: Site based WO numbering
- REQ Pattern: Site based REQ numbering
- Boilerplate Safety/Steps for Corrective (CM) and Preventive Work Orders
- SLA Contract
- Tech Photo
- No WO Email

WO TS template:	<input type="text"/>		
Asset pattern?:	<input type="checkbox"/>		
Asset pattern:	<input type="text"/>	Asset seq:	<input type="text"/>
WO pattern?:	<input type="checkbox"/>		<input type="text"/>
WO pattern:	<input type="text"/>	WO seq:	
REQ pattern?:	<input type="checkbox"/>		
REQ pattern:	<input type="text"/>	REQ seq:	<input type="text"/>
<b>WO Default Steps</b>			
CM Plan?:	<input type="checkbox"/>	CM Plan:	<input type="text"/> 
PM Plan?:	<input type="checkbox"/>	PM Plan:	<input type="text"/> 
SLA contract?:	<input type="checkbox"/>	SLA contract:	<input type="text"/> 
Crew hrs?:	<input type="checkbox"/>	Crew hrs/day:	<input type="text"/>
No tech photo:	<input type="checkbox"/>	No WO Email?:	<input type="checkbox"/>

# EAM Site – WO Email Opt-Out

CalemEAM

- WO Email Opt-Out at Site Level
- Opt-Out by Category, Status and Priority

MainOpt-OutMonitorTeamDocBusiness LinesLocationCustomize

EAM Site (1 of 8)

Customize

Site: 

FARADAY

Note: 

My company

Service site: [FARADAY](#)PO site: [FARADAY](#)

WO Cat. Opt-out (0)

Customize

<input type="checkbox"/>	#	Category	Last modified	
No results found.				

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# EAM Site – Planner/Monitor/Acceptor

CalemEAM

- Work Order Planner, Monitor and Acceptor for the Site

MainOpt-OutMonitorTeamDocBusiness LinesLocationCustomize

EAM Site (1 of 8)

Customize

Site: FARADAYNote: My company

Service site: FARADAYPO site: FARADAY

Monitor User (4)

Customize

	#	Full name	Monitor Role	Note	Last modified
<input type="checkbox"/>	1	Calem Eam	WO Monitor	Manual entry	9/28/14 6:21 PM C..
<input type="checkbox"/>	2	Calem Test (no Login...	WO Planner	Manual entry	9/28/14 6:21 PM C..
<input type="checkbox"/>	3	Calem Eam	WO Planner	Manual entry	9/28/14 6:21 PM C..
<input type="checkbox"/>	4	Calem Test (no Login...	WO Monitor	Manual entry	9/28/14 6:21 PM C..

Work acceptor (0)

Customize

	Full name	Note	Last modified
--	-----------	------	---------------

# EAM Site – Team/User

CalemEAM

- Teams for the Site
- Users assigned to the Site

MainOpt-OutMonitorTeamDocBusiness LinesLocationCustomize

EAM Site (1 of 8)

Customize

Site: 

FARADAY

Note: 

My company

Service site: [FARADAY](#)PO site: [FARADAY](#)

Team (1)

Customize

<input type="checkbox"/>	#	Team	Lead	Note	Last modified
<input type="checkbox"/>	1	TigerTeam			1/11/16 2:21 PM C..

Site Assignment (0)

Customize

<input type="checkbox"/>	#	Full name	Note	Part time?	Part time %	Last modified
--------------------------	---	-----------	------	------------	-------------	---------------

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- Doc and Attachment for the Site

Main	Opt-Out	Monitor	Team	Doc	Business Lines	Location	Customize
------	---------	---------	------	-----	----------------	----------	-----------

**EAM Site (1 of 8)**

Customize

**Site:** FARADAY **Note:** My company

**Service site:** [FARADAY](#) **PO site:** [FARADAY](#)

**Documents (0)**

Customize

<input type="checkbox"/>	Seq	Document	Note	Last modified
--------------------------	-----	----------	------	---------------

**Attachment (0)**

View file Download All Customize

<input type="checkbox"/>	File	Note	Last modified
--------------------------	------	------	---------------






- Business Lines for the Site
- Skill-Match Assignment


Main	Opt-Out	Monitor	Team	Doc	Business Lines	Location	Customize
------	---------	---------	------	-----	----------------	----------	-----------

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**EAM Site (1 of 8)**

---

     Customize





**Site:**  FARADAY **Note:** My company

**Service site:** [FARADAY](#) **PO site:** [FARADAY](#)

---

**Business lines (0)**

---

    Customize

<input type="checkbox"/>	Business Line	Last modified
--------------------------	---------------	---------------

- Locations in the Site

MainOpt-OutMonitorTeamDocBusiness LinesLocationCustomize

EAM Site (1 of 8)

Customize

Site: FARADAY

Note: My company

Service site: FARADAY

PO site: FARADAY

Location (2)

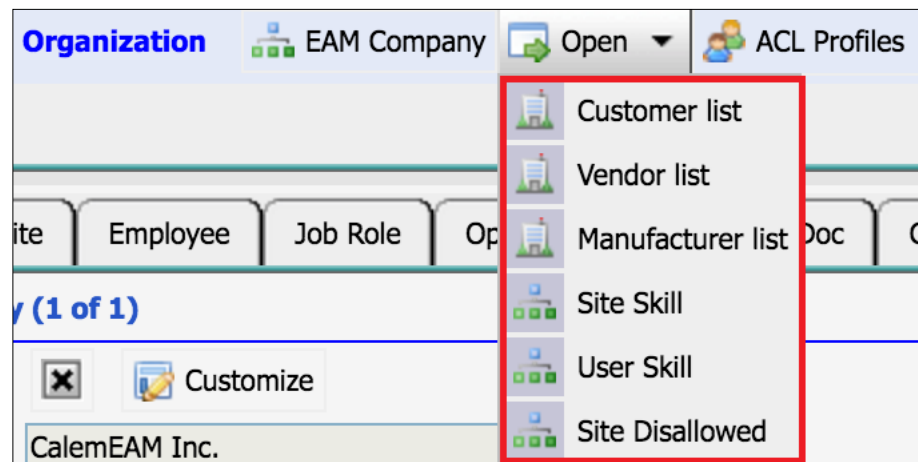
Customize

	#	Location	Note	Loc group	Loc category	Status	Owner	Last modified
<input type="checkbox"/>	1	FARADAY						7/23/13 3:...
<input type="checkbox"/>	2	Tire Yard		PROD.TIRE		In service		6/20/14 10...

# Customer and Vendor

CalemEAM

- Customers
- Vendors
- Manufacturers
- Skill Management
- Site Disallowed








# Customer – Creation


CalemEAM


- Set Customer “Company”
- Set Phone, Email, Default SLA
- “Client acct” for Financial Readiness

[Customer list List](#) > Customer Create

**Customer**

 Save  Cancel  Customize

 Value is required: Company

**Company:** 

**Alias:**

**Note:**

**Comment:**

**Phone:**

**Email:**


**Fax:**

**URL:**

**Client acct.:**

**No tech photo:** ☐

**SLA contract?:** ☐

**SLA contract:**  

# Customer – Sites

CalemEAM

- Customer Sites
- Addresses

MainSiteEmployeeJob RoleItemOpt-OutDocCustomize

Customer (1 of 7)

Customize

Company: ARNG

Alias:

Customer Site (2)

Customize

<input type="checkbox"/>	Site	Note	Service site	Inventory site?	Inventory site	Last modified
<input type="checkbox"/>	ARNG	ARNG info 1	MySite_CA	<input checked="" type="checkbox"/>		2/22/16 9:30 AM ...
<input type="checkbox"/>	ARNG-Test	ARNG info 2		<input type="checkbox"/>	ARNG	2/22/16 9:30 AM ...

Address (0)

Customize

<input type="checkbox"/>	Address	Note	Addr. type	Last modified
--------------------------	---------	------	------------	---------------

# Customer – Employees

CalemEAM

- Customer Employees
- May Log Into Calem

MainSiteEmployeeJob RoleItemOpt-OutDocCustomize

Customer (1 of 7)

Customize

Company: ARNG

Alias:

Employee (1)

Customize

	#	Full name	Note	Status	Site	Last modified
<input type="checkbox"/>	1	Test ARNG			ARNG	4/10/12 10:21 AM ...






# Customer – WO Email Opt-Out

CalemEAM


- Opt-Out of WO Emails by Category, Status and Priority

MainSiteEmployeeJob RoleItemOpt-OutDocCustomize

**Customer (1 of 7)**







Customize

**Company:**  ARNG

**Alias:**

**WO Cat. Opt-out (0)**



Customize

<input type="checkbox"/>	#	Category	Modified by	Last modified
No results found.				

# Customer – Doc & Attachment






CalemEAM


Main	Site	Employee	Job Role	Item	Opt-Out	Doc	Customize
------	------	----------	----------	------	---------	-----	-----------

---

**Customer (1 of 7)**

---

     Customize





**Company:**  ARNG

**Alias:**

---

**Documents (0)**

---







    Customize

<input type="checkbox"/>	Seq	Document	Note	Last modified

---

**Attachment (0)**

---

    View file  Download All  Customize

<input type="checkbox"/>	File	Note	Last modified




# Customer Site – Creation


CalemEAM


- Set “Site” name
- Set Service Site and Inventory Site
- Set Service Request Email Flag and Domain
- Set Credit Hold and Customer # for Financial Control

[Customer](#) > Customer Site Create

**Customer Site**

 Save  Cancel  Customize

 Value is required: Site

**Site:** 

**Inventory site?:** ☐

**Service site:**  **Inventory site:**

**Request in email:** ☐

**Email domain:**

**Contact:**

**Default Tech:**

**Credit hold?:** ☐

**Customer #:**






# Customer Site – Defaults


CalemEAM


- Site Level Defaults for Boilerplate CM/PM Steps
- SLA, Numbering for WO, Time Zone, Locale

Main		Opt-Out		Monitor		Doc		Business Lines		Location		Member		Customize	
------	--	---------	--	---------	--	-----	--	----------------	--	----------	--	--------	--	-----------	--

**Customer Site (1 of 2)**

     Customize

Company:  [ARNG](#)

Site: 

---

**Contact:** [Test ARNG](#) **Credit hold?:** ☐

**Default Tech:**  **Customer #:**

**Note:**

**Service site:** [MySite\\_CA](#)

**Inventory site?:** ☒ **Inventory site:**

**Request in email:** ☒ **Disabled?:** ☐

**Email domain:**  **Out of service?:** ☐

**Phone:**  **Fax:**

**Email:**

**URL:**

**WO Default Steps**

**CM Plan?:** ☐ **CM Plan:**

**PM Plan?:** ☐ **PM Plan:**

**Work days:**  **Work hours:**

**WO pattern?:** ☐ **WO seq:**

**WO pattern:**  **SLA contract:**

**SLA contract?:** ☐ **Locale:**

**Currency:**  **No WO Email?:** ☐

**Time Zone:**

**No tech photo:** ☐


# Customer Site – WO Email Opt-Out


CalemEAM


- Site level opt-out by Category, Status and Priority


MainOpt-OutMonitorDocBusiness LinesLocationMemberCustomize


Customer Site (1 of 2)













 Customize


Company:  [ARNG](#)


Site: 

WO Cat. Opt-out (0)







 Customize

<input type="checkbox"/>	#	Category	Last modified	
No results found.				

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# Customer Site – Monitor/Planner/Acceptor

CalemEAM

- WO Monitor/Planner
- WO Acceptor

MainOpt-OutMonitorDocBusiness LinesLocationMemberCustomize

Customer Site (1 of 2)

Customize

Company: ARNG

Site: ARNG

Monitor User (1)

Customize

	#	Full name	Monitor Role	Note	Last modified
<input type="checkbox"/>	1	Administrator	WO Monitor	Manual entry	6/4/15 12:20 PM C..

Work acceptor (0)

Customize

	Full name	Note	Last modified
--	-----------	------	---------------






# Customer Site – Other Data


CalemEAM


- Doc & Attachment
- Business Lines
- Locations
- Users assigned to the Site


Main Opt-Out Monitor Doc Business Lines Location Member Customize







**Customer Site (1 of 2)**

     Customize

**Company:**  [ARNG](#)

**Site:** 

 **Site Assignment (2)**

      Customize

<input type="checkbox"/>	#	Full name	Note	Part time?	Part time %	Last modified
<input type="checkbox"/>	1	Test ARNG	Upgrade to R8.5i	<input type="checkbox"/>		1/21/14 9:44 AM ...
<input type="checkbox"/>	2	Ben Manning		<input type="checkbox"/>		12/26/13 4:55 PM...

# Vendor Company – Creation

CalemEAM




- Set Vendor Name
- Vendor Site is created with the Vendor's Name


[Vendor list List](#) > Vendor Create

---


**Vendor**

---

 Save  Cancel  Customize

 Value is required: Company

---

**Company:** 

**Alias:**

**Note:**

**Is manufacturer?:** ☐

**Comment:**


**Phone:**

**Email:**

**Fax:**

**URL:**

**SLA contract?:** ☐

**SLA contract:**  

# Vendor Company – Details

CalemEAM

- Vendor Sites – Service Site Flag for Work Orders
- Vendor Employees
- Vendor Docs & Attachments
- Vendor Addresses
- Vendor Site has Docs & Attachments

MainSiteEmployeeDocCustomize

Vendor (1 of 255)

Customize

Company: A-VOX Systems

Alias:

Site (1)

Customize

<input type="checkbox"/>	Site	Note	Service site?	Disabled?	Last modified
<input type="checkbox"/>	A-VOX Systems	Vendor from NH	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3/10/13 1:24 AM Ce...

# Manufacturer Company – Creation

CalemEAM




- Set Manufacturer Name
- Manufacturer Site is created with the Manufacturer's Name


[Manufacturer list List](#) > Manufacturer Create

---


**Manufacturer**

---

 Save  Cancel  Customize

 Value is required: Company

---

**Company:** 

**Alias:**

**Note:**

**Is vendor?:** ☐

**Comment:**

**Phone:**

**Email:**

**Fax:**

**URL:**






# Manufacturer Company – Details

CalemEAM

- Sites
- Employees
- Doc & Attachment

Main	Site	Employee	Doc	Customize
------	------	----------	-----	-----------

**Manufacturer (2 of 249)**

     Customize

**Company:**

**Alias:**

---

**Note:**

**Is vendor?:** ☐

**Comment:**

**Address:**

# User – Creation

CalemEAM

- Set Full Name, Site
- “Is EAM Crew?” for WO Assignment, Job Role Required
- Email and Email SMS for email notifications
- “User name” and “Password” for Login

[User list List](#) > User Create

**User**

Save Cancel Customize

Value is required: Full name

**Full name:**

**Note:**

**Status:** Active

**Salutation:**

**Is contractor?:** ☐

**Site:**

**Is EAM crew?:** ☐

**App profile:**

**No WO Email?:** ☒

**Locale:**

**Employee #:**

**Suffix:**

**Vendor site:**

**Location:**

**Availability (%):**

**Device profile:**

**No SR Email?:** ☒

**No SMS?:** ☒

**Job**

**Job role:**

**Supervisor:**

**Account:**

**Job title:**

**Team:**

**Dept:**

**Access rights**

**Login allowed?:** ☒

**User name:**

**Login till:**

**Search admin:** No admin

**Password:**  Retype:

**Communication**

**Phone:**

**Mobile:**

**Email:**

**Email SMS:**

# User – ACL Profile

CalemEAM

- Must have at least one ACL Profile for login

MainACL profileOpt-OutMembershipDocCustomize

User (1 of 45)

Customize

Full name:

Administrator

Note:

Status:

Active

Employee #:

00001

User ACL (13)

Customize

<input type="checkbox"/>	#	Profile	Profile access	Note	Last modified
<input type="checkbox"/>	1	Meter-Mod	All		4/2/13 8:58 AM C...
<input type="checkbox"/>	2	MySite-Loc_Exclude	All	Manual entry	4/11/16 11:25 AM...
<input type="checkbox"/>	3	MySite-Loc-Include	All	Manual entry	4/11/16 10:00 AM...
<input type="checkbox"/>	4	OfflineTech-MySite	All		11/4/09 8:20 PM ...
<input type="checkbox"/>	5	Administrator	All		10/21/13 9:14 AM...
<input type="checkbox"/>	6	Users-MySite	All		4/15/11 10:41 AM...
<input type="checkbox"/>	7	Profile_READ-ONLY	All		9/15/10 2:48 PM ...



# User – Details

CalemEAM

- Assigned to Sites, Teams
- Opt-Out emails by WO Category, Status and Priority
- Doc & Attachment

MainACL profileOpt-OutMembershipDocCustomize

User (1 of 45)

Customize

Full name:

Administrator

Note:

Status:

Active

Employee #:

00001

Site Assignment (1)

Customize

<input type="checkbox"/>	Full name	Site	Note	Part time?	Part time %	Last modified
<input type="checkbox"/>	Administrator	MySite	Upgrade to R7.2e	<input type="checkbox"/>		6/23/15 6:40 PM ...

Team Member (1)

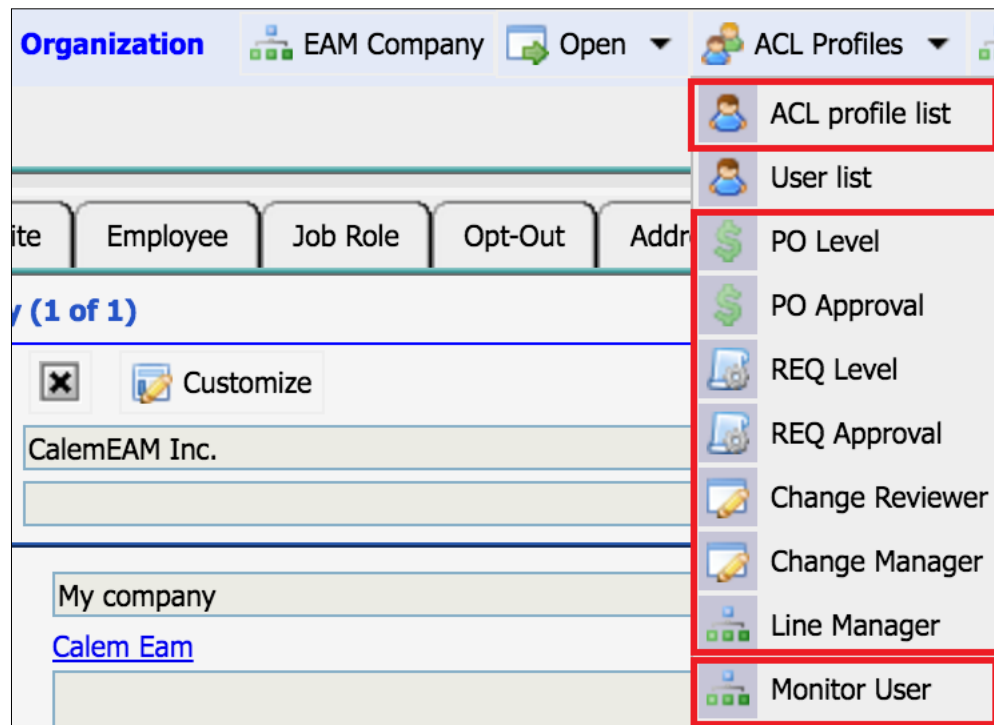
Customize

<input type="checkbox"/>	Full name	Team	Note	Last modified
<input type="checkbox"/>	Administrator	MyCA_Team1	Auto-added by user editing.	1/11/16 4:13 PM Cen...

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- **ACL Profile List – Access Control**
- **User Management**
  - Set “Status” not “Active” will block Login
- REQ, Purchase and Change Management Roles
- **User Roles for Workflow Email Notifications**



# User Roles for Workflow – Creation

CalemEAM

- Select Roles

[Monitor User List](#) > Option Lookup

**Option (19)**

☒ Select (1+)


<input type="checkbox"/>	#	Option
<input checked="" type="checkbox"/>	1	WO Planner
<input checked="" type="checkbox"/>	2	WO Monitor
<input type="checkbox"/>	3	SR Dispatcher
<input type="checkbox"/>	4	SR Monitor
<input type="checkbox"/>	5	Change Monitor (MOC)
<input type="checkbox"/>	6	Change Planner (MOC)
<input type="checkbox"/>	7	Asset Monitor
<input type="checkbox"/>	8	Contract Monitor
<input type="checkbox"/>	9	REQ Approver
<input type="checkbox"/>	10	REQ Buyer
<input type="checkbox"/>	11	REQ Monitor
<input type="checkbox"/>	12	Inventory Monitor
<input type="checkbox"/>	13	Training Monitor
<input type="checkbox"/>	14	Login Monitor
<input type="checkbox"/>	15	PO Approver
<input type="checkbox"/>	16	PO Monitor
<input type="checkbox"/>	17	Integration Monitor
<input type="checkbox"/>	18	Report Monitor
<input type="checkbox"/>	19	SW Monitor







# User Roles for Workflow – Creation

CalemEAM

- Select Sites

[Monitor User List](#) > [Option Lookup](#) > Site Lookup

 **Site (25)**

 Select (1+)  Cancel     Customize


<input type="checkbox"/>	#	Site	Service site	Note	Company	Class	Last modified
<input type="checkbox"/>	1	ARNG	MySite_CA	ARNG info 1	ARNG	Customer	2/22/16 9:30 AM Cen...
<input type="checkbox"/>	2	ARNG-Test		ARNG info 2	ARNG	Customer	2/22/16 9:30 AM Cen...
<input checked="" type="checkbox"/>	3	Austin-TX-DMV			TX-DMV	Customer	2/15/16 4:50 PM Centra
<input type="checkbox"/>	4	Customer site -002			Customer-001	Customer	12/26/13 12:17 PM C...
<input checked="" type="checkbox"/>	5	Customer site-001			Customer-001	Customer	12/26/13 12:21 PM Cen
<input type="checkbox"/>	6	Customer site-002			Customer-001	Customer	9/18/14 6:57 AM Cen...
<input checked="" type="checkbox"/>	7	Customer-001			Customer-001	Customer	12/26/13 12:25 PM Cen
<input type="checkbox"/>	8	FARADAY	FARADAY	My company	CalemEAM Inc.	Service Provider	2/17/16 4:47 PM Cen...
<input checked="" type="checkbox"/>	9	JJ.Austin	MySite	JJ's Austin Site	JJ-Chain	Customer	2/22/16 5:14 PM Centra
<input type="checkbox"/>	10	JJ.CA	MySite	JJ's CA site	JJ-Chain	Customer	2/22/16 5:14 PM Cen...
<input type="checkbox"/>	11	KRT-New	KRT-New	My company	CalemEAM Inc.	Service Provider	2/15/16 4:49 PM Cen...







# User Roles for Workflow – Creation

CalemEAM

- Select Users

[Monitor User List](#) > [Option Lookup](#) > [Site Lookup](#) > User Lookup

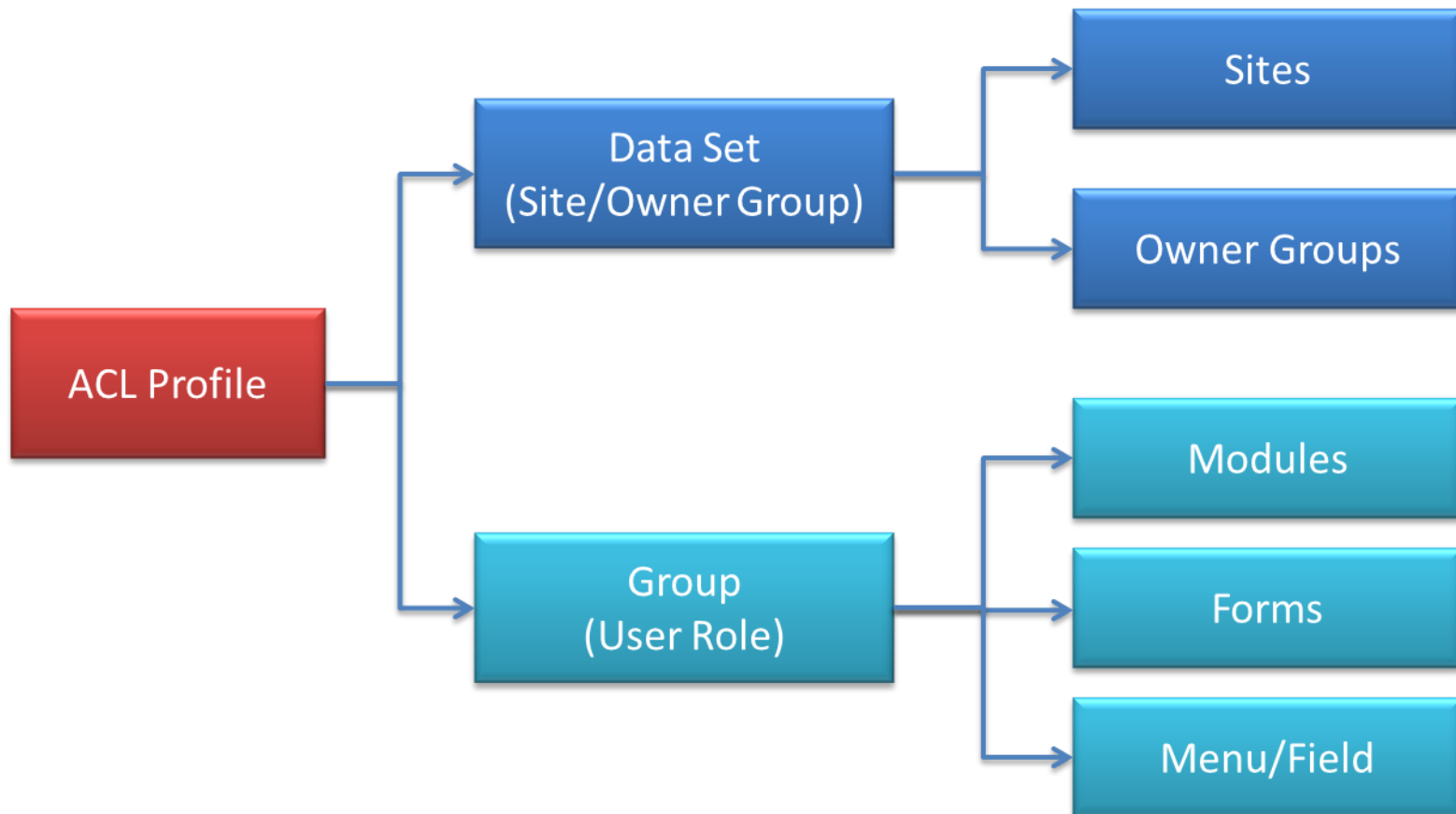
 **User (45)**

 Select (1+)  Cancel     Customize

<input type="checkbox"/>	#	Full name	User name	Login allowed?	Note	Job role	Team	Dept	Site
<input type="checkbox"/>	1	Administrator	admin	<input checked="" type="checkbox"/>		ELEC-L2	MyCA_Team1	MAINTENA...	MySite
<input type="checkbox"/>	2	Anonymous	anonymous	<input checked="" type="checkbox"/>					MySite
<input type="checkbox"/>	3	API	calem_api	<input checked="" type="checkbox"/>					MySite
<input checked="" type="checkbox"/>	4	Ben Manning	benmanning	<input checked="" type="checkbox"/>		008			JJ.CA
<input checked="" type="checkbox"/>	5	Calem Eam	calem	<input checked="" type="checkbox"/>		ELEC-L2	MyTeam2		MySite
<input checked="" type="checkbox"/>	6	Calem Test (no Login)	u011	<input checked="" type="checkbox"/>		002	Network.Team		MySite
<input type="checkbox"/>	7	Calem Test-A	u013	<input checked="" type="checkbox"/>		004	My_Team2		MySite
<input type="checkbox"/>	8	Calem Test2 (no Log...	u012	<input checked="" type="checkbox"/>		006	MyCA_Team1		MySite

# CalemEAM

- | Monitor User (67)        |               |                   |               |          |                                  |                     |  |
|--------------------------|---------------|-------------------|---------------|----------|----------------------------------|---------------------|--|
| <input type="checkbox"/> | Full name     | Monitor Role      | Site          | Location | Note                             | Last modified       |  |
| <input type="checkbox"/> | MPB           | WO Monitor        | Austin-TX-DMV |          |                                  | 7/17/14 2:43 PM ... |  |
| <input type="checkbox"/> | John Huntsman | Inventory Moni... |               |          |                                  | 3/21/14 6:43 AM ... |  |
| <input type="checkbox"/> | John Freeman  | SR Dispatcher     | MySite        |          | Migrated from cm_sr_dispatche... | 11/15/11 10:24 P... |  |
| <input type="checkbox"/> | Jack Greener  | WO Planner        | MySite_CA     |          |                                  | 9/1/13 11:32 PM ... |  |
| <input type="checkbox"/> | Jack Greener  | SW Monitor        | MySite        |          | Cloned from Calem Eam            | 11/16/11 1:55 PM... |  |
| <input type="checkbox"/> | Jack Greener  | SR Dispatcher     | MySite        |          | Cloned from Calem Eam            | 11/16/11 1:55 PM... |  |
| <input type="checkbox"/> | Jack Greener  | Login Monitor     | MySite        |          | Cloned from Administrator        | 8/5/14 12:05 PM ... |  |
| <input type="checkbox"/> | Jack Greener  | WO Monitor        | MySite        |          | Cloned from Administrator        | 8/5/14 12:05 PM ... |  |
| <input type="checkbox"/> | Jack Greener  | WO Monitor        | JJ.Austin     |          |                                  | 7/17/14 2:41 PM ... |  |



# ACL Profile: Site/Owner Groups

CalemEAM

- Data Access by Sites
- Data Access by Owner Groups inside Sites

Site Examples	Owner Group Examples
Regions of a state: District 1 District 2 District 3 District 4	Assets by Maintenance Ownerships: IT Facility Production
Offices of an org: TX NY SC FL	



# ACL Profile: Group (User Role)

CalemEAM

- No Customization: user level customization not allowed
- Data permission: No Insert/No Edit/No Delete

Group (User Role) Samples	Flags
Supervisors with all rights	All Allowed
Technicians who cannot delete data (No access: Admin/Org modules, Readonly: Inventory and Purchase)	No Deletion No Customization
Inventory Staff who cannot delete data (No access: Admin/Org modules, Readonly: Work Order)	No Deletion
Operational Staff who can create requests (Create: Service Request and Work Orders)	No Deletion No Edit
Others who can only view data (No access: Admin/Org modules, Readonly: all modules accessible)	No Insert No Edit No Delete

# ACL Profile Samples

CalemEAM

ACL Profile	Sites	Owner Group	Group (User Role)
TX-Tech	TX	All	Technician
All-Supervisor	All	All	Supervisor
TX-Tech-IT	TX	IT	Technician
TX/SC-Supervisor-Prod	TX, SC	Production	Supervisor
Admin	All	All	Admin




# ACL Profile – Creation


CalemEAM

- Set UI Group for Desktop (web), Phone, Tablet, Touch (desktop)
- Set Access Permission (No Insert, etc.)
- Set “All Site Access” to allow all site data access
  - Uncheck this flag to set specific sites


[ACL profile list List](#) > ACL profile Create

**ACL profile**



 Save  Cancel  Customize


 Value is required: Profile


---


**Profile:** 

**Note:**

**Desktop group:**   

**Phone group:**  

**Tablet group:**  

**Touch group:**  

**All site access:** ☐ **Profile access:**

**No Insert:** ☐ **No Delete:** ☐

**No Edit:** ☐ **No Customize:** ☒

# ACL Profile – Site Access

CalemEAM

- Add Sites to allow site-specific access
- Company ACL is auto-adjusted






Main


Site

User


Customize







**ACL profile (1 of 32)**

 Customize

Profile:  Meter-Mod







Note:

 **Site ACL (1)**

 Customize

<input type="checkbox"/>	#	Site	Note	Last modified	
<input type="checkbox"/>	1	Austin-TX-DMV	Manual entry	9/28/14 8:39 PM Ce...	

**Company ACL (1)**

 Customize

<input type="checkbox"/>	#	Company	Note	Last modified	
<input type="checkbox"/>	1	TX-DMV	Having access to site	9/28/14 8:39 PM C...	

# ACL Profile – Owner Group

CalemEAM

- Owner Group for access control of assets and locations within sites
- Use either inclusion or exclusion, not both

MainSiteUserOwner GroupItem Owner GroupCustomize

ACL profile (8 of 47)

Customize

Profile: 

CM\_Supervisor

Note: 

Test group for supervisors

Owner Group (Inclusion) (2)

Customize

<input type="checkbox"/>	#	Owner Group	Note	Last modified
<input type="checkbox"/>	1	IT	Manual entry	10/21/17 4:08 P...
<input type="checkbox"/>	2	Facility	Manual entry	10/21/17 4:08 P...

Owner Group (Exclusion) (0)

Customize

<input type="checkbox"/>	#	Owner Group	Note	Last modified
No results found.				






# ACL Profile – User Assignment

CalemEAM

- Assign users to this ACL Profile


MainSiteUserCustomize







ACL profile (1 of 32)

 Customize

Profile:

Note:

 User ACL (1)

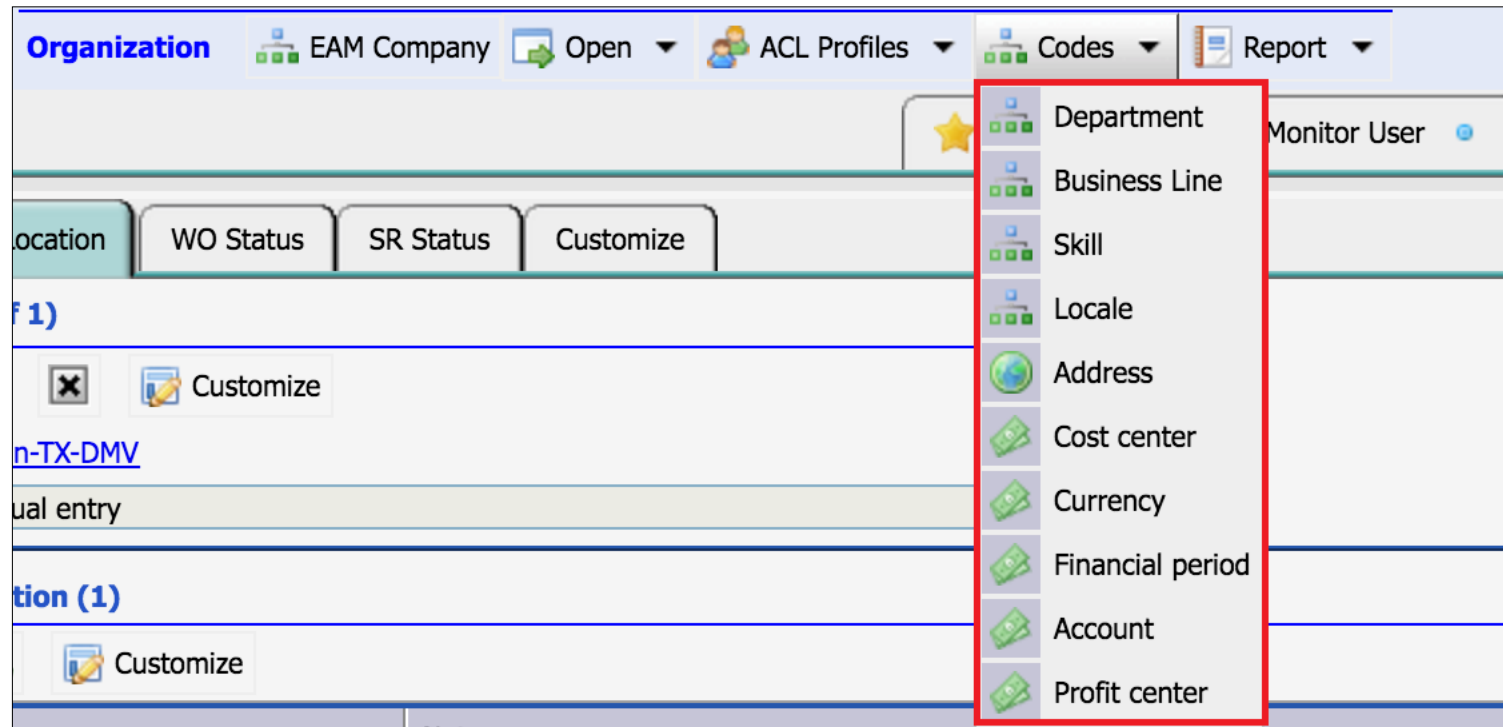
 Customize

<input type="checkbox"/>	#	Full name	Note	Last modified
<input type="checkbox"/>	1	Administrator		4/2/13 8:58 AM Ce...

# Mult-Site – Codes

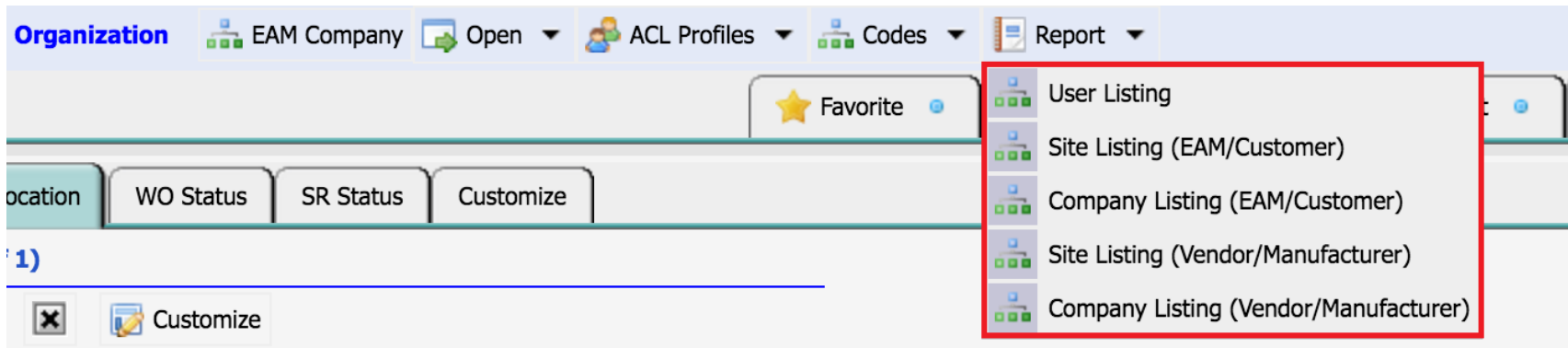
CalemEAM

- Manage Codes for Mult-Sites
- Multi-Currency is supported



# Mult-Site – Reports

CalemEAM





- Create an EAM Site
- Create a customer and site
- Create a vendor and site
- Create a manufacturer and site
- Set up WO planner and monitor
- Set up WO acceptor
- Set up SR monitor and dispatcher
- Assign a service technician to two sites

- Create an ACL Profile for maintenance supervisors
- Create an ACL Profile for maintenance staff
- Create a user for login
  - Username and Password are set
- Assign the maintenance staff profile to the user

# Next Module – Screen & Data Customization

CalemEAM

Multi-Site  
Access Control

Screen & Data  
Customization

Workflow  
ScheduledTasks








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



# Do Not Send List









CalemEAM









- Tech Staff should not be sent for on-site service
- By default these users do not show in the WO Assignment List

<input type="text"/>  Site Disallowed (3)						
		 Disallowed in WO			 Customize	
<input type="checkbox"/>	#	Full name	Site	Company	Last modified	
<input type="checkbox"/>	1	Administrator		CalemEAM Inc.	10/12/15 6:34 P...	
<input type="checkbox"/>	2	IT BENCHSTOCK	KRT-New	CalemEAM Inc.	10/12/15 2:44 P...	
<input type="checkbox"/>	3	Ben Manning		JJ-Chain	10/12/15 2:10 P...	

# Skills – Site and User Skills

CalemEAM

	Site Skill (6)					
	<div><input type="text"/></div> <div> <b>Site Skill (6)</b></div>					
	<div>       Customize</div>					
<input type="checkbox"/>	Company	Site	Business Line	Vendor	Certificate	Cert Level
<input checked="" type="checkbox"/>	CalemEAM Inc.	MySite	video	Agilent	Cert	
<input type="checkbox"/>	TX-DMV		Camera	3M	Cert	1,000
<input type="checkbox"/>	CalemEAM Inc.	TX_MySite	video	Agilent	Cert	
<input type="checkbox"/>	JJ-Chain	JJ.Austin	Camera	3M	Cert	1,000
<input type="checkbox"/>	JJ-Chain		Camera	3M	Cert	1,000
<input type="checkbox"/>	ARNG		Camera	3M	Cert	1,000

	User Skill (4)						
	<div><input type="text"/></div> <div> <b>User Skill (4)</b></div>						
	<div>       Customize</div>						
<input type="checkbox"/>	Full name	Business Line	Vendor	Certificate	Cert Level	License	Expiration
<input type="checkbox"/>	John Freeman	Camera	3M	Cert	1,000		
<input type="checkbox"/>	Administrator	video	Agilent	Cert			
<input type="checkbox"/>	Calem Eam	Camera	Allied Healthcare P..	Cert		4567890	2/23/13
<input type="checkbox"/>	Administrator	video	Agilent	Cert		456789	2/9/13

# Customer – Labor Rates

CalemEAM

- Labor Rates for Customer
- Labor Rates for Customer Sites

MainSiteEmployeeJob RoleItemOpt-OutDocCustomize

Customer (1 of 7)

Customize

Company: ARNG

Alias:

Job Role (Customer) (1)

Customize

<input type="checkbox"/>	Job role	Rate (USD)	Note	Last modified
<input type="checkbox"/>	002	55.00		3/27/15 10:43 A...

Job Role (Site) (1)

Customize






# Customer – Spare Part Rates


CalemEAM

- Parts Rates for Customer
- Parts Rates for Customer Sites


MainSiteEmployeeJob RoleItemOpt-OutDocCustomize





**Customer (1 of 7)**

 Customize


**Company:**  ARNG





**Alias:**

 **Item Price (Company) (2)**

 Customize

<input type="checkbox"/>	Item	Unit price ()	Currency	Last modified
<input type="checkbox"/>	Item.Uom_001	100.00		4/1/15 8:40 PM ...
<input type="checkbox"/>	05-01-0022	25.00	USD	3/30/15 5:12 PM..

 **Item Price (Site) (2)**

 Customize

<input type="checkbox"/>	Site	Item	Unit price ()	Currency	Last modified
<input type="checkbox"/>	ARNG	ITM-001	30.00		4/1/15 8:41 PM ...
<input type="checkbox"/>	ARNG	05-01-0022	38.00		3/30/15 5:21 PM...

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