

Part 4.1: System Functions – Admin Module

Calem Enterprise Training

Summer 2024
Austin, Texas



CONFIDENTIAL

What are the goals – Admin

CalemEAM

Goals

I know how to identify a user group

I know how to set up group tree

I know how to customize modules by groups

I know how to customize forms and reports by groups

I know how to customize text

I know how to customize dropdowns and tables

I know how to create category attributes

I know how to set up fixed user seats

Admin Module: Screen & Data Customization

CalemEAM

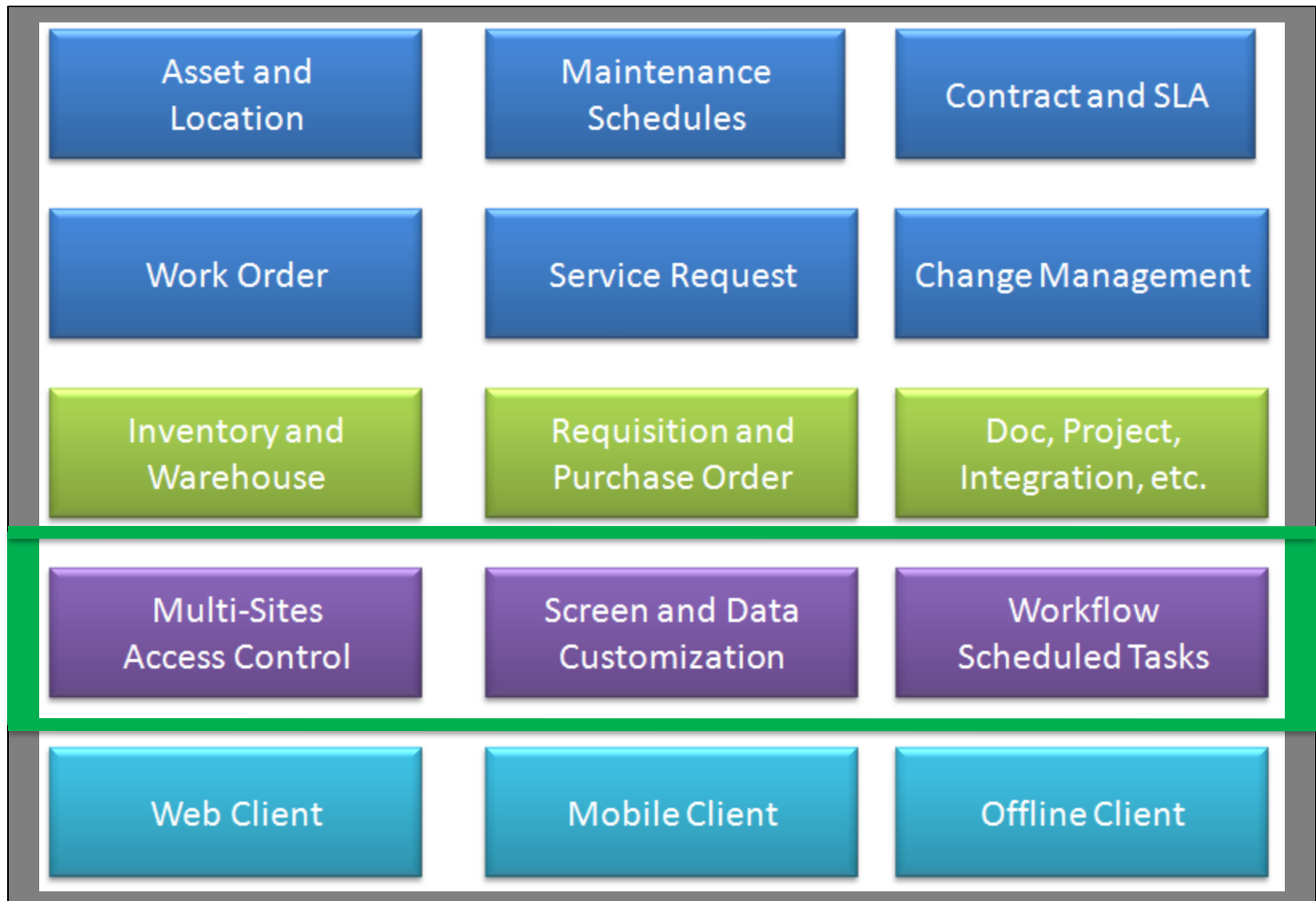
Multi-Site
Access Control

Screen & Data
Customization

Workflow
ScheduledTasks

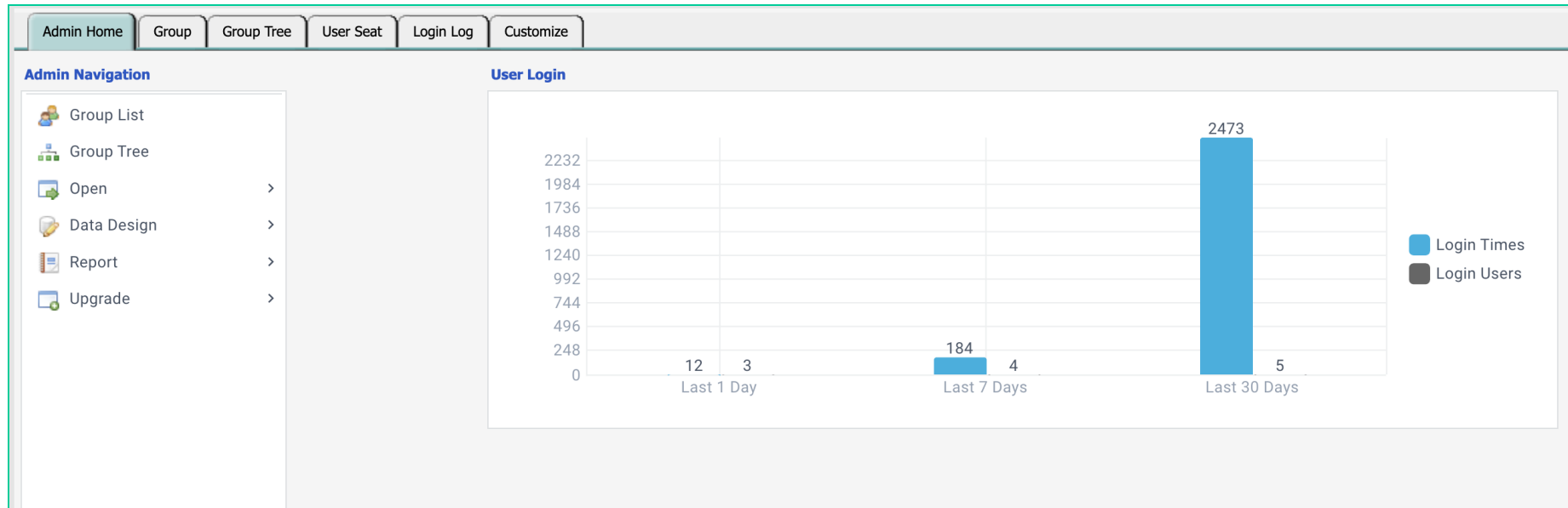
Product Overview – Functions

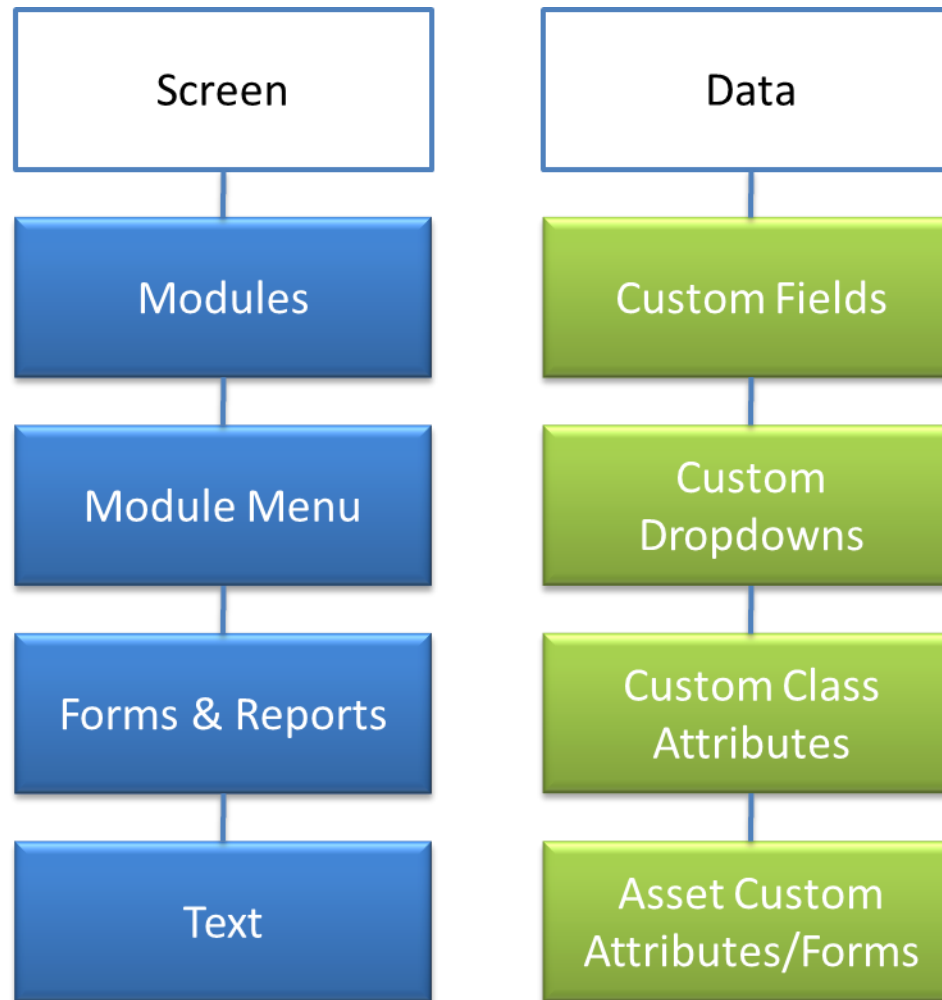
CalemEAM



Product – Admin Module

CalemEAM

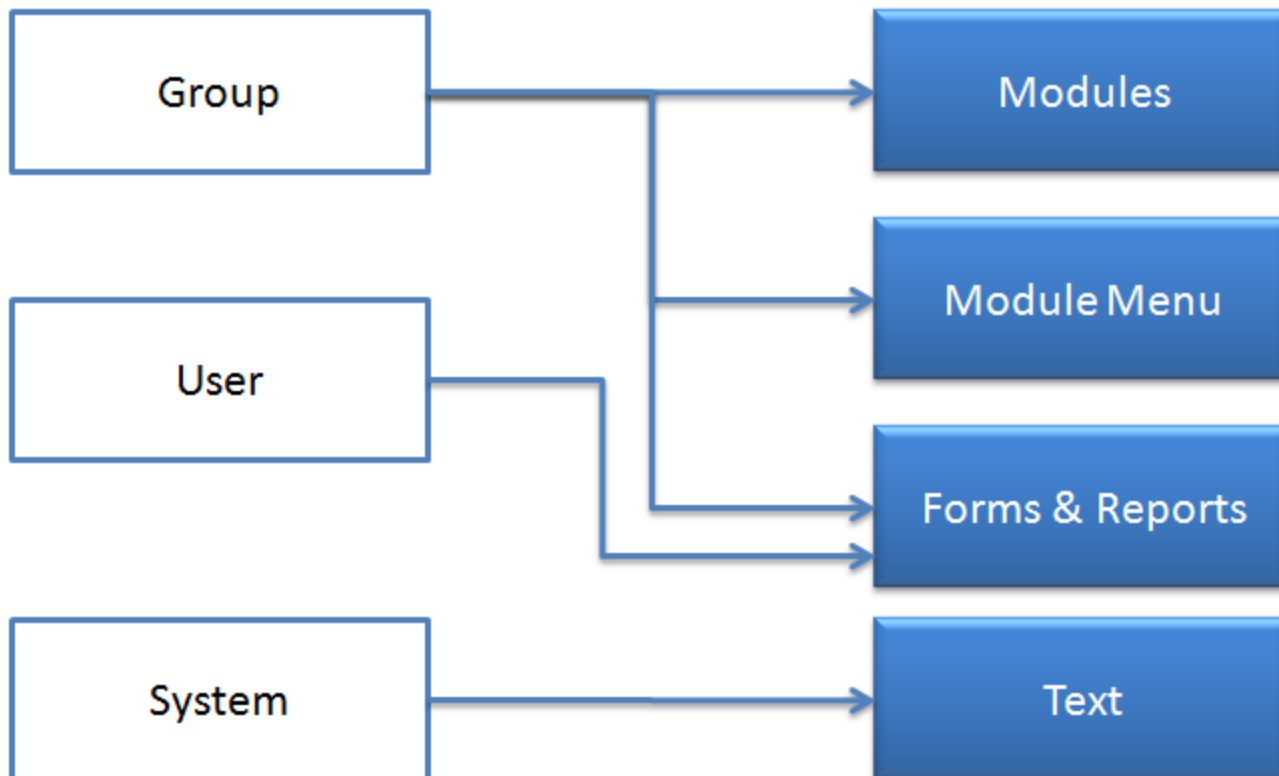




Screen Customization

CalemEAM

- Group – Role-Based
- User – Overwrite Group; Power Users
- System – Text



User Group

CalemEAM

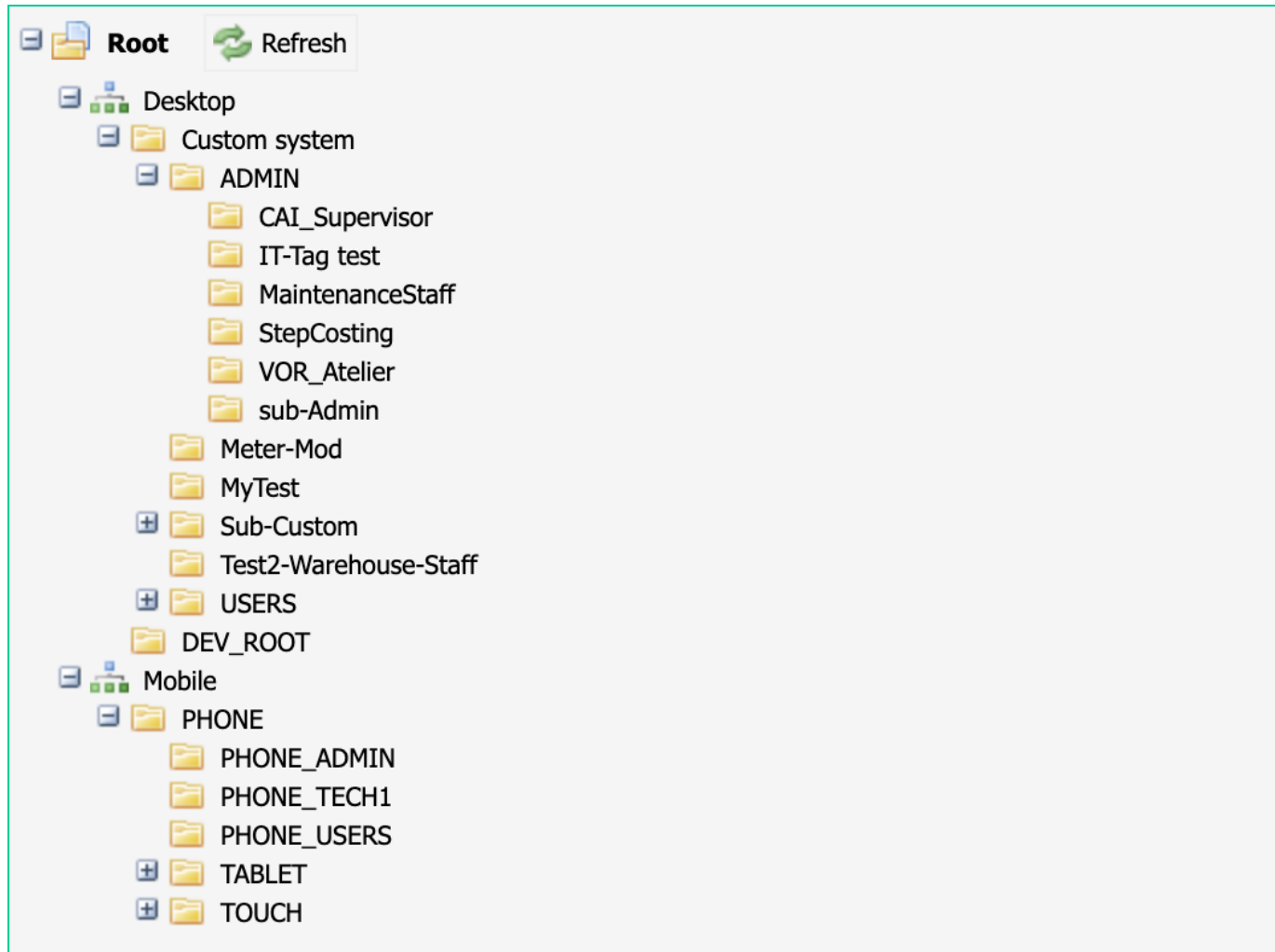
- **User Group, or Role | Persona**
 - **E.g. : Maintenance Supervisors, Maintenance Staff**
- **Group Type: Desktop (Web), Phone, Tablet, Touch (Desktop)**
- **Parent/Child Groups**

Group (28)							
<div> <div>+</div> <div>-</div> <div>↺</div> <div>✕</div> <div>🔍</div> <div>🔍</div> <div>🔧 Customize</div> <div>📁 Group design</div> </div>							
<input type="checkbox"/>	#	Group	Parent group	Note	Type	Last modified ▾	
<input type="checkbox"/>	1	OpTech	USERS		Desktop	9/1/15 4:05...	
<input type="checkbox"/>	2	TireTech	USERS		Desktop	9/1/15 10:3...	
<input type="checkbox"/>	3	TOUCH_USERS	TOUCH	Root Touch group for non-admin users	Touch	11/23/14 7:...	
<input type="checkbox"/>	4	TOUCH_ADMIN	TOUCH	Root touch group for admin users	Touch	11/23/14 7:...	
<input type="checkbox"/>	5	TOUCH		Root customization for touch users	Touch	11/23/14 7:...	
<input type="checkbox"/>	6	DEV_ROOT			Desktop	11/2/14 2:0...	
<input type="checkbox"/>	7	TABLET_USERS	TABLET	Root Tablet group for non-admin users	Tablet	10/27/14 1...	
<input type="checkbox"/>	8	PHONE_USERS	PHONE	Root Phone group for non-admin users	Phone	10/27/14 1...	
<input type="checkbox"/>	9	PHONE		Root customization for phone users	Phone	10/27/14 1...	
<input type="checkbox"/>	10	TABLET_ADMIN	TABLET	Root tablet group for admin users	Tablet	10/27/14 1...	
<input type="checkbox"/>	11	TABLET		Root customization for tablet users	Tablet	10/27/14 1...	

Group Tree

CalemEAM

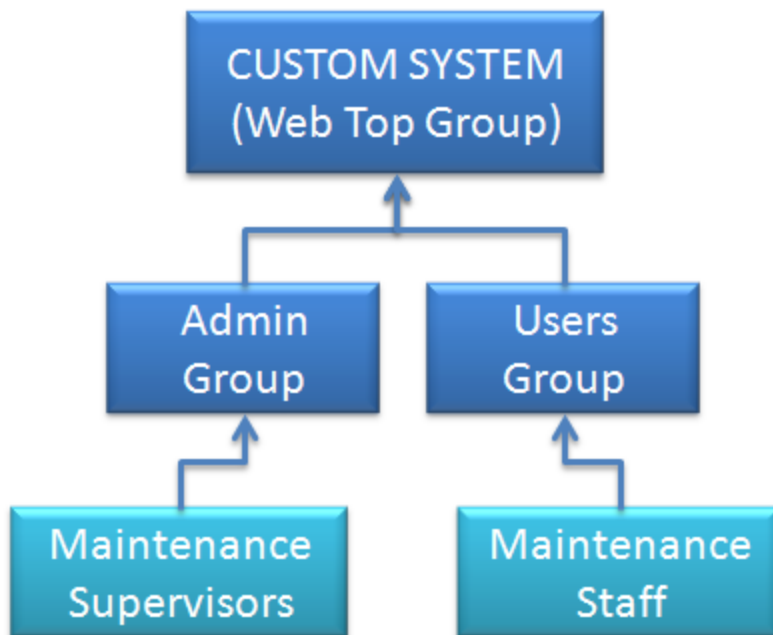
- Use Group Tree to drive user roles and user interface (UI) design



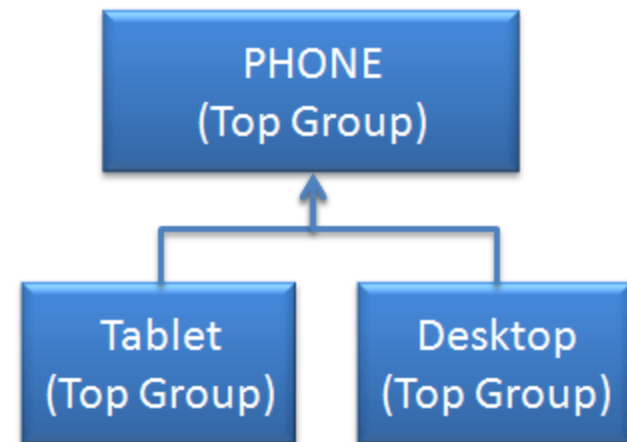
User Group Hierarchy

CalemEAM

- Child Group inherits customization in Parent Group
 - Use Parent Group if not defined
 - Overwrite Parent Group if defined



Calem Web UI Groups



Calem Touch UI Groups




Group Creation


CalemEAM


- Set Group name (e.g.: Maintenance Supervisors)
- Set Parent Group
- Set Type


[Group List](#) > Group Create

Group

 Save  Cancel  Customize

 Value is required: Group

Group: 

Parent group: 

Type:









Note:

- Desktop
- Phone
- Tablet
- Touch

Customization for Group

CalemEAM

- Check a group to customize
- Click “Group design” to start

Group (28)							
<div> Customize  Group design</div>							
<input type="checkbox"/>	#	Group	Parent group	Note	Type	Last modified	
<input type="checkbox"/>	1	ADMIN	Custom system	Root group to use for all admin groups	Desktop	10/23/14 3:...	
<input type="checkbox"/>	2	Anonymous	USERS	Seed group for anonymous users	Desktop	10/23/14 3:...	
<input type="checkbox"/>	3	CAI_Supervisor	ADMIN	My group2	Desktop	10/23/14 3:...	
<input checked="" type="checkbox"/>	4	Custom system		Customization/configuration shared by all c	Desktop	10/23/14 3:50	
<input type="checkbox"/>	5	Customers	USERS	Customers of My Calem Enterprise	Desktop	10/23/14 3:...	


Group Customization – Modules


CalemEAM


- Assign Modules Accessible
- Customize Module Menu

[Group List](#) > Group modules List

Group modules (21)

 Modules accessible

 Module design



Module
Favorite
Dashboard
Admin
Analysis
Asset
Contract
Document
Integration

Modules Accessible

CalemEAM

- Drag-and-Drop
- Right Panel: Available
- Left Panel: Hidden

The screenshot displays the 'Form design (CmModuleViewList)' interface. On the left, a 'Save to:' dropdown is set to 'Custom system'. Below it, a list of modules is shown, with 'Module design' highlighted and circled in red. The right panel, also titled 'Module design' and circled in red, contains a list of modules with checkboxes: Favorite, Dashboard, Admin, Analysis, Asset, Contract, Document, Integration, Inventory, Change Mgmt, Offline, Organization, Preventive Maint., Project, Purchase, and Failure.

Form design (CmModuleViewList)

Save Cancel

Save to: Custom system

Module design

- ☐ Barcode
- ☐ Financial
- ☐ Inspection
- ☐ Software
- ☐ Setting

Module design

- ☐ Favorite
- ☐ Dashboard
- ☐ Admin
- ☐ Analysis
- ☐ Asset
- ☐ Contract
- ☐ Document
- ☐ Integration
- ☐ Inventory
- ☐ Change Mgmt
- ☐ Offline
- ☐ Organization
- ☐ Preventive Maint.
- ☐ Project
- ☐ Purchase
- ☐ Failure

Module Customization

CalemEAM

- Default Menu for Module
- Menu Folders
- Menu

The screenshot displays the 'Form design (CmModuleViewList)' interface. On the left, a file explorer shows the following structure:

- Module design
 - Menu node
 - Menu item
 - My PM (CmWoMyPmFormCustor)
 - My Team PM (CmWoMyTeamPm)

On the right, a tree view shows the following structure:

- Module design
 - Drop for item design
 - Default menu item
 - My assignment
 - Module layout
 - Work Order (Separator)
 - Open WO
 - Create WO
 - Create WO
 - Create from PM Plan
 - Create request
 - Create from PM
 - Create completed WO
 - My Assignment
 - My Work
 - My Team Work
 - My assignment
 - My request
 - My team assignment
 - My Clock

Group Customization

CalemEAM

- Keep Group Form Open for Group Customization
- If Group Form is closed, the Customization for the Login User only

The screenshot displays the CalemEAM Management of Change (MOC) interface. The top navigation bar includes the CalemEAM logo, a welcome message for the Administrator, the system version (Calem Enterprise 10c), and the current customization (Custom system). The main navigation menu on the left lists various system components. The central area shows the MOC management tools, including buttons for creating and opening MOCs, and a search bar. The 'Group' tab is highlighted, showing a list of MOCs. The table below lists the MOCs with columns for ID, MOC number, asset, location, requester, status, reviewed status, need by, subject, and last modified date.

#	MOC #	Asset #	Location	Requester	Status	Reviewed	Need by	Subject	Last modified
1	29	JJ.CA.AC-00...	OH-CA-001	Calem Eam	New	None		My chg	3/22/16 10:31 ...

List Form Customization

CalemEAM

- Save/Delete Customization
- Hide/Show: Menu, Field
- Move Field

Form design (CmWoOsViewLis [Open WO List](#) > Open WO Design

Free text search:

Save Cancel

Save to: Custom system

Form design

- Row
- Tool bar
- cm_wo
- Custom fields
- Caption

Create Open Delete Refresh Close (Separator) Print PDF Print All Get All (Separator) Search

#	Wo #	Flag	Asset #	Location	Status	Priority	PM?	Subject	Sched start
1	69572		0911-2345	B02.HQ	In-proce...	P1	<input checked="" type="checkbox"/>	Meter-based PM job for 091...	3/1/14 2:17 PM C...

Grid design

- cm_wo
- Custom fields

Read, Edit, New Form Customization

CalemEAM

- Save/Delete
- Clean Up
- Menu
- Field
- Custom Field

Form design (CmWoTkExecViewRead)

Save Cancel Delete Clean Up

Save to: Custom system

Form design

- Row
- Tool bar
- cm_wo
- Custom fields
- TT Caption

Work Order (Task) > Work Order Design

(Row) Work Order (Cell)

(Row) Create Edit Delete (Separator) Previous Next Refresh Close Print PDF Start Clock (Separator) More

(Row) (Error message row)

(Row) Wo # (wo_no) Wo # (wo_no)

(Row) Asset # (asset_id) Asset # (asset_id)

(Row) Location (location_id) Location (location_id)

(Row) Priority (priority_id) Priority (priority_id)

(Row) Status (status_id) Status (status_id)

(Row) Subject (note) Subject (note)

(Row) Completion (Cell)

(Row) Actual start (actual_start_time) Actual start (actual_start_time)

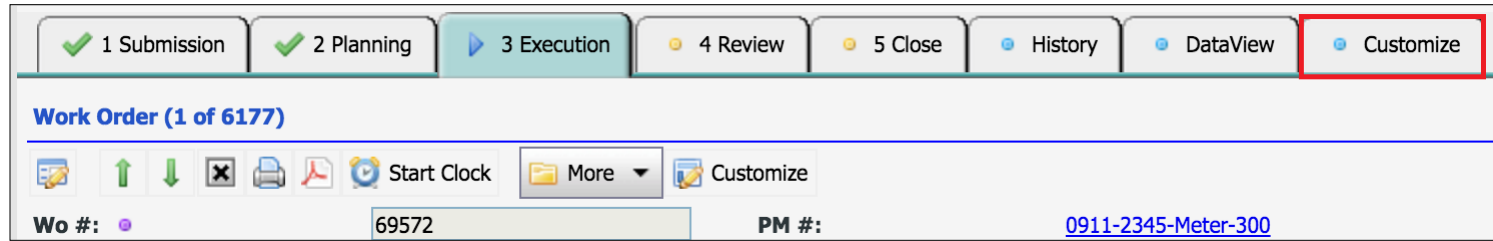
(Row) Repaired? (is_repaired) Repaired? (is_repaired)

(Row) Ready for use? (is_ready) Ready for use? (is_ready)

Master-Detail Form Customization

CalemEAM

- Add/Remove: Tabs and Forms

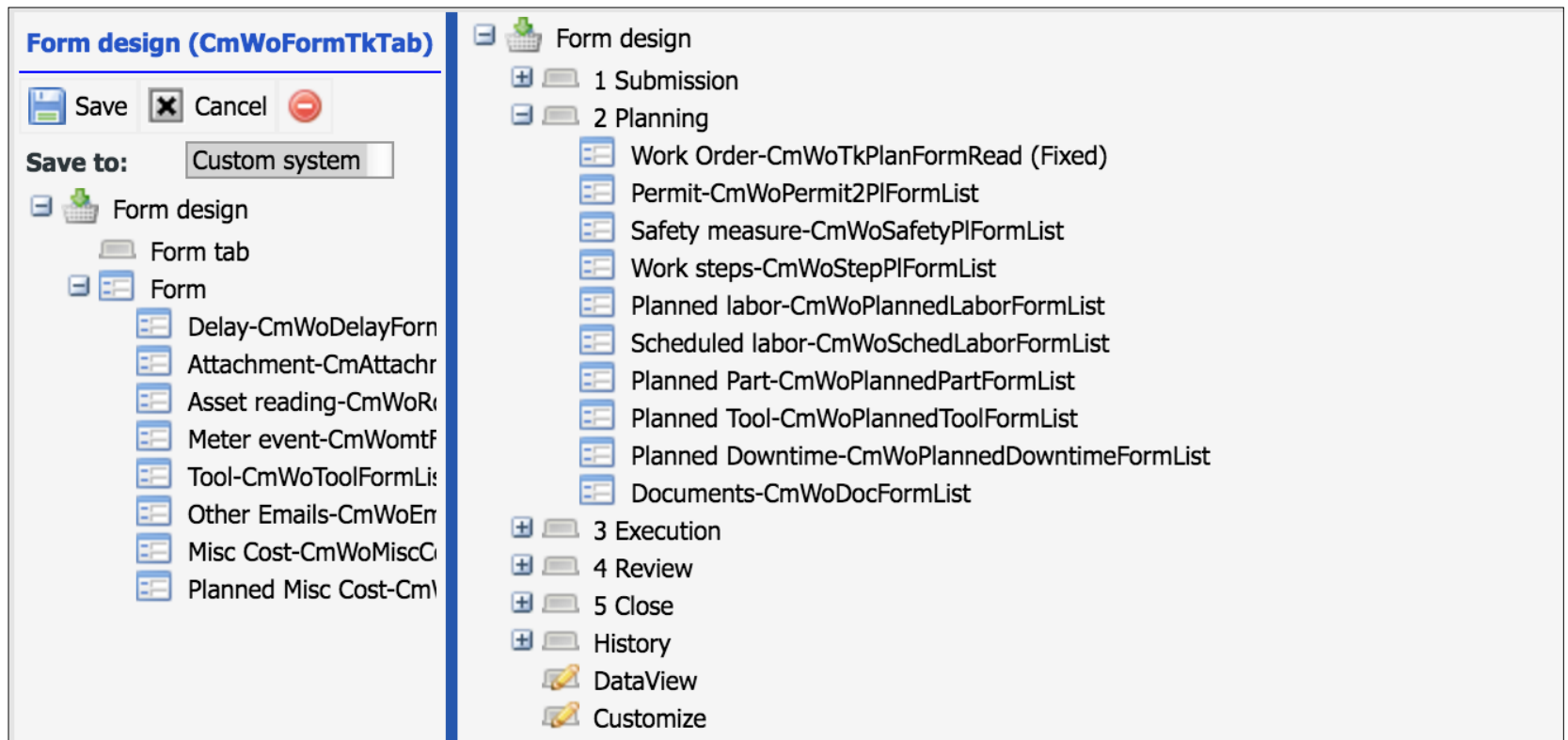


1 Submission 2 Planning 3 Execution 4 Review 5 Close History DataView Customize

Work Order (1 of 6177)

Start Clock More Customize

Wo #: 69572 PM #: 0911-2345-Meter-300



Form design (CmWoFormTkTab)

Save Cancel

Save to: Custom system

Form design

- Form tab
 - Form
 - Delay-CmWoDelayForm
 - Attachment-CmAttachr
 - Asset reading-CmWoR
 - Meter event-CmWomtF
 - Tool-CmWoToolFormLi
 - Other Emails-CmWoEr
 - Misc Cost-CmWoMiscC
 - Planned Misc Cost-Cm\





















Form design

- 1 Submission
- 2 Planning
 - Work Order-CmWoTkPlanFormRead (Fixed)
 - Permit-CmWoPermit2PIFormList
 - Safety measure-CmWoSafetyPIFormList
 - Work steps-CmWoStepPIFormList
 - Planned labor-CmWoPlannedLaborFormList
 - Scheduled labor-CmWoSchedLaborFormList
 - Planned Part-CmWoPlannedPartFormList
 - Planned Tool-CmWoPlannedToolFormList
 - Planned Downtime-CmWoPlannedDowntimeFormList
 - Documents-CmWoDocFormList
- 3 Execution
- 4 Review
- 5 Close
- History
- DataView
- Customize

Report Customization

CalemEAM

- The Same as Forms
- E.g.: WO Print

All WO (6773)												
<div> Print All  Get All  Customize   Customize  More</div>												
<input type="checkbox"/>	#	Wo #	Flag	Asset #	Location	Status	Priority	PM?	Subject	Sched start	Assigned to	Site
<input type="checkbox"/>	1	76333		forum_5		Canceled	P1	<input checked="" type="checkbox"/>	Meter-based PM job for 0911...	7/10/14 4:16 AM...	MPB	
<input checked="" type="checkbox"/>	2	105591		0911-2345	B02.HQ	Disapprove	P1	<input checked="" type="checkbox"/>	My testing it			MySite
<input type="checkbox"/>	3	93100		200-001	CA.Building2	Closed	P1	<input checked="" type="checkbox"/>	Testing it	6/26/15 10:21 A...	Calem Eam	My TX site
<input type="checkbox"/>	4	69572		0911-2345	B02.HQ	In-proce...	P1	<input checked="" type="checkbox"/>	Meter-based PM job for 0911...	3/1/14 2:17 PM C..	MPB	MySite
<input type="checkbox"/>	5	105752		Test-PROD-006	B02.HQ	New	P1	<input checked="" type="checkbox"/>	My testing	3/23/16 8:21 AM...	Calem Eam	MySite
<input type="checkbox"/>	6	69570		forum_8		Closed	P1	<input checked="" type="checkbox"/>	Meter-based PM job for 0911...	3/20/15 9:00 AM...	Administrator	
<input type="checkbox"/>	7	4466				Closed	P1	<input checked="" type="checkbox"/>	PM_Weekly	3/16/10 10:00 A...	Jack Greener	JJ.CA

Search Form Customization

CalemEAM

- Add/Remove fields
- The Same as an Edit Form

Form design (CmWoViewSearch) | [All WO List](#) > [Search Search](#) > [Work Order Search](#) > Work Order Design

Save Cancel Delete

Save to: Custom system

Form design

- Row
- Tool bar
- cm_wo
- Custom fields
- Caption

(Row)	Work Order	(Cell)	(Cell)	(Cell)
(Row)	Apply & save (Separator) Apply Save (Separator) Reset Cancel Customize			
(Row)	(Error message row)			
(Row)	(Error message row)			
(Row)	Save search:	Save search (field)		
(Row)	Wo # (wo_no)	Wo # (wo_no) (Cell)		(Cell)
(Row)	Asset # (asset_id)	Asset # (asset_id)	Asset group (in_id)	Asset group (in_id)
(Row)	Asset note (asset_note)	Asset note (asset_note) (Cell)		(Cell)
(Row)	PM # (pm_id)	PM # (pm_id) (Cell)		(Cell)
(Row)	PM Plan (pm_plan_id)	PM Plan (pm_plan_id) (Cell)		(Cell)
(Row)	SR # (sr_id)	SR # (sr_id) (Cell)		(Cell)
(Row)	Location (location_id)	Location (location_id) (Cell)		(Cell)
(Row)	Site (site_id)	Site (site_id) (Cell)		(Cell)






Group Status Control


CalemEAM

- Allow or Disallow Statuses, NOT BOTH!
 - E.g.: Do not allow the group to close WOs
- WO & SR Statuses

MainWO StatusSR StatusCustomize





Group (4 of 28)

 Customize

Group:  Custom system





Parent group: Type: Desktop

Include WO Status (0)

 Customize

<input type="checkbox"/>	Status	Note
--------------------------	--------	------

Exclude WO Status (0)

 Customize

<input type="checkbox"/>	Status	Note
--------------------------	--------	------

User Customization

CalemEAM

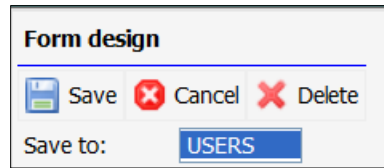
- Close Group Form
- Customize is for the login user
- “Save to”: User name, not a Group name



Form design

Save Cancel Delete

Save to: jfreeman



Form design

Save Cancel Delete

Save to: USERS

Text Customization

CalemEAM

- “admin” user Login
- System Scope Customization

Form design (CmGroupViewRead) [Group](#) > Group Design

Save Cancel Delete

Save to: Custom system

Form design

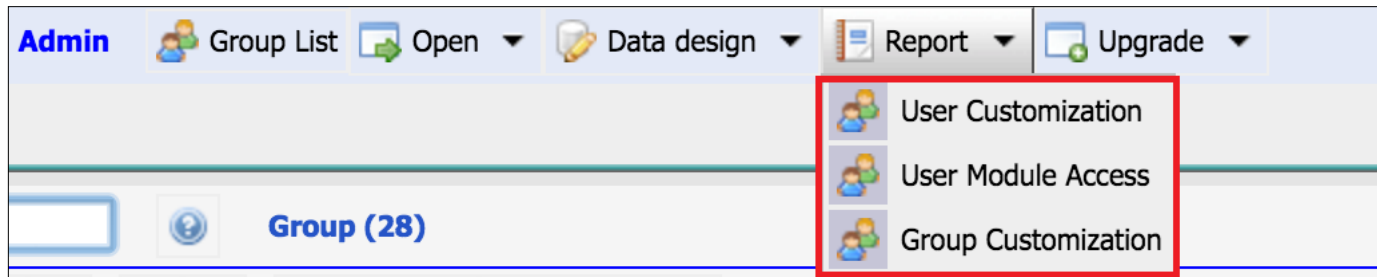
- Row
- Tool bar
- cm_group
- Custom fields
- TT Caption

(Row)	Group	(Cell)	(Cell)	(Cell)
(Row)	Create Edit Delete Previous Next (Separator) Close (Separator) Customize			
(Row)	(Error message row)			
(Row)	Group (cm_group) Edit label	Group (cm_group)	(Cell)	(Cell)
(Row)	Parent group (parent_group_id)	Parent group (parent_group_id)	Type (type_id)	Type (type_id)
(Row)	Note (note)	Note (note)	(Cell)	(Cell)
(Row)	Last modified (modified_time)	Last modified (modified_time)	Modified by (modified_id)	Modified by (modified_id)
(Row)	Time created (created_time)	Time created (created_time)	Created by (created_id)	Created by (created_id)

Customization Report

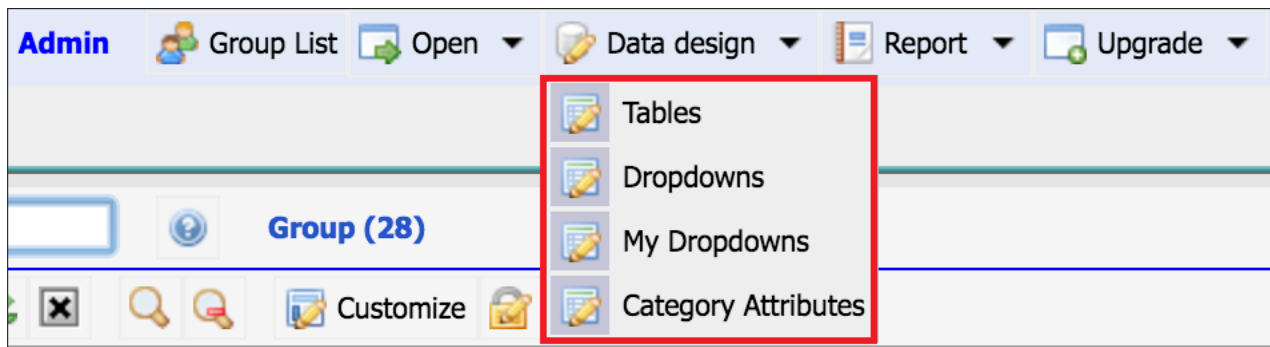
CalemEAM

- User Customization
- User Module Access
- Group Customization



- Create a group
- Assign modules accessible
- Customize module menu items
- Customize a list form, read form, creation form, and edit form
- Customize a master/detail form with tabs
- Customize Dashboard with tabs
- Customize WO print
- Customize search form
- Customize text
- Run Customization Reports
 - Find out group customizations
 - Find out user customizations

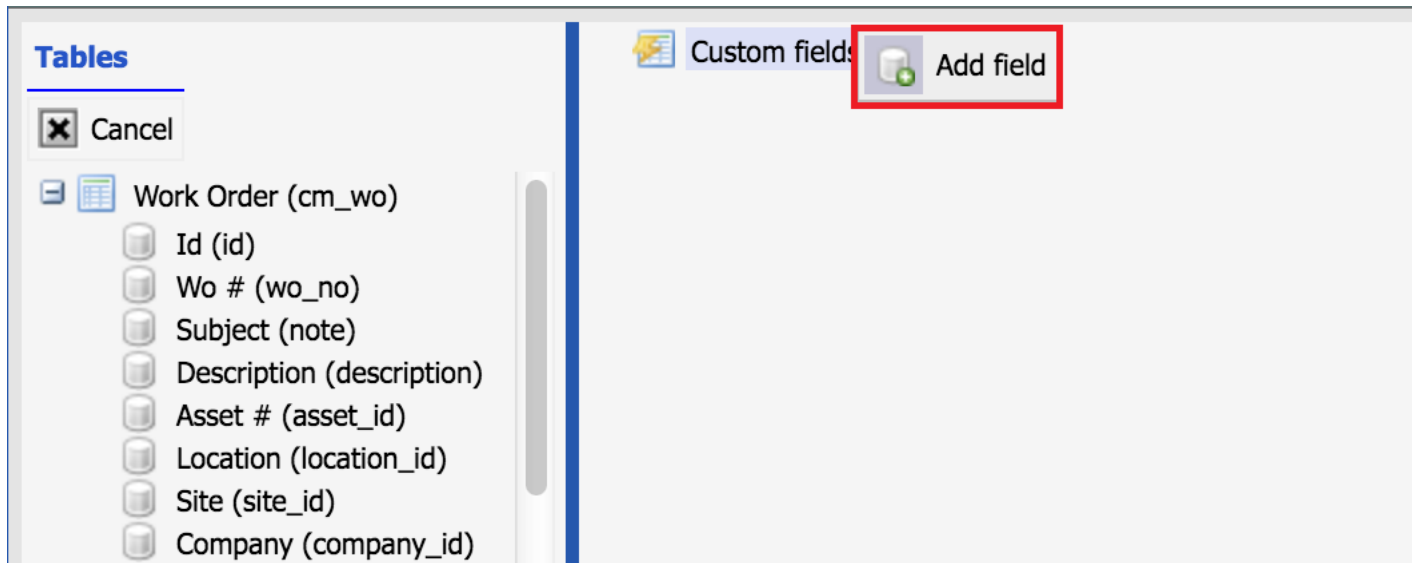
- Custom Fields: add fields to existing tables
- Dropdown: add/remove to existing dropdowns
- My Dropdowns: add new dropdowns
- Category Attributes: new attributes for Asset Category/Sub-Category



Custom Field

CalemEAM

- Select a table to add custom fields
- Right-Click to add fields
- Edit custom fields






Custom Field – Creation


CalemEAM


- Lookup: a dropdown, my dropdown, or a lookup table


[Table list List](#) > [Table list Design](#) > Table field Create

Table field

 Save  Cancel  Customize


 Value is required: Label

Label: 

Field name: 

Field type: Varchar (length required) ▼

Length: Varchar (length required)

Lookup: 

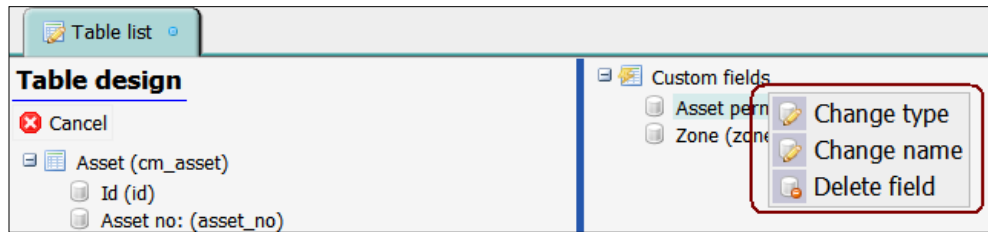
Required:

- Varchar (length required)
- Text (long text field)
- Guid (Varchar (36))
- Boolean
- Integer
- Double
- Date
- Datetime
- System currency
- Other currency
- Lookup

Custom Field – Edit

CalemEAM

- Change Type
- Change Name
- Delete Field



Custom Dropdown

CalemEAM

- Add/Remove dropdowns
- Edit Dropdowns

The screenshot displays the 'Custom Dropdown' configuration window. On the left, under the 'Dropdowns' header, there is a 'Cancel' button and a list of dropdowns. The first dropdown is 'Status (cm_wo_status)', which contains 14 items: New (Fixed), Approved (Fixed), Released (Fixed), In-process (Fixed), On-Hold (Fixed), Completed (Fixed), Accepted (Fixed), Rejected (Fixed), Closed (Fixed), Disapproved (Fixed), Canceled (Fixed), and Incomplete (Fixed). The second dropdown is 'Status (cm_v)', which contains 14 items: New (Fixed), Approved (Fixed), Released (Fixed), In-process (Fixed), On-Hold (Fixed), Completed (Fixed), Accepted (Fixed), Rejected (Fixed), Closed (Fixed), Disapproved (Fixed), Canceled (Fixed), En Route, and Incomplete (Fixed). A red box highlights the 'Add dropdown' button, which is located at the top right of the dropdown list area.

Dropdowns

Status (cm_v)

- New (Fixed)
- Approved (Fixed)
- Released (Fixed)
- In-process (Fixed)
- On-Hold (Fixed)
- Completed (Fixed)
- Accepted (Fixed)
- Rejected (Fixed)
- Closed (Fixed)
- Disapproved (Fixed)
- Canceled (Fixed)
- En Route
- Incomplete (Fixed)

Status (cm_wo_status)

- New (Fixed)
- Approved (Fixed)
- Released (Fixed)
- In-process (Fixed)
- On-Hold (Fixed)
- Completed (Fixed)
- Accepted (Fixed)
- Rejected (Fixed)
- Closed (Fixed)
- Disapproved (Fixed)
- Canceled (Fixed)
- Incomplete (Fixed)



Custom Dropdown – Creation/Edit


CalemEAM


- Status Graph needs to be changed when applicable
 - Add new statuses to work order
 - Add new statuses to requisition
- See **Calem Enterprise Admin Guide** for more info


[Dropdown list List](#) > [Dropdown list Design](#) > Dropdown Create

Dropdown

 Save  Cancel


 Value is required: Label


Label: 



Id: 


Dropdown list



Dropdown design


 Cancel


 Asset class (cm_asset_class)

-  Equipment (Fixed)
-  Location (Fixed)

 Asset class (cm_asset_class)

-  Equipment (Fixed)
-  Location (Fixed)







 Edit dropdown

 Delete field

My Dropdowns

CalemEAM

- New dropdowns added by customers
- Can be used in Custom Field

<input type="text"/>			 My Dropdowns (4)
			  Customize
<input type="checkbox"/>	Id	Note	
<input type="checkbox"/>	zd_os	OS	
<input type="checkbox"/>	zd_server_hardware	Server Hardware	
<input type="checkbox"/>	zd_server_vendor	Server Vendor	
<input type="checkbox"/>	zd_sub_system	Sub-system	




My Dropdowns - Creation


CalemEAM


- Set Note and ID
- Save to add dropdown values


[My Dropdowns List](#) > My Dropdown Create

My Dropdown


 Save  Cancel  Customize


 Ready to save changes.



Note:  QualityGrade

Id: 

Dropdowns

 Cancel

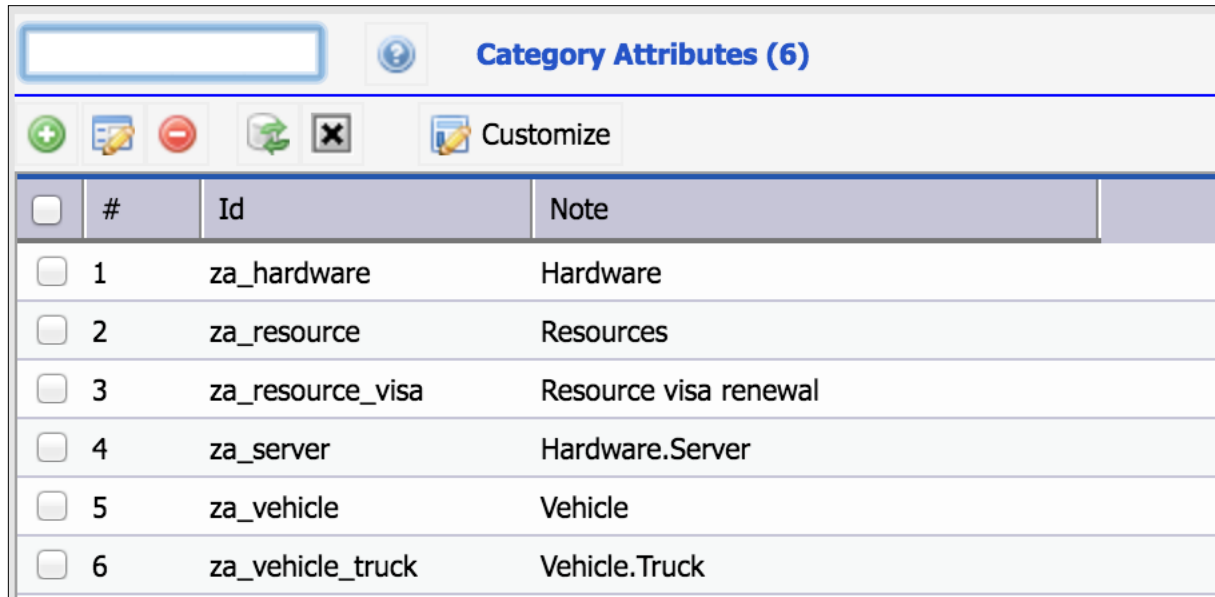
 QualityGrade (zd_quality_grade)

 QualityGrade  Add dropdown

Class Attributes

CalemEAM

- Set of attributes applicable to asset or location
- Linked to asset/location classes
- E.g.: Memory and CPU attributes for server objects



<input type="checkbox"/>	#	Id	Note
<input type="checkbox"/>	1	za_hardware	Hardware
<input type="checkbox"/>	2	za_resource	Resources
<input type="checkbox"/>	3	za_resource_visa	Resource visa renewal
<input type="checkbox"/>	4	za_server	Hardware.Server
<input type="checkbox"/>	5	za_vehicle	Vehicle
<input type="checkbox"/>	6	za_vehicle_truck	Vehicle.Truck




Class Attributes – Creation


CalemEAM


- Set Note and ID
- Save to add attribute fields


[Category Attributes List](#) > Category Attributes Create

Category Attributes


 Save  Cancel  Customize


 Ready to save changes.



Note:  Hardware.Router

Id:  hardware_router

Tables

 Cancel

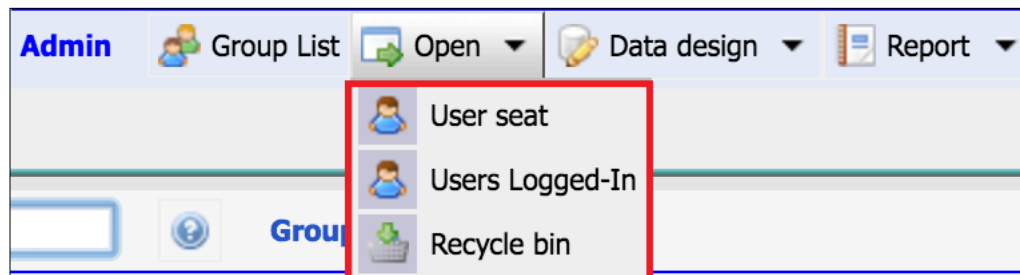
 Hardware.Router (za_hardware_r

 Custom fields  Add field

- Edit Asset | Location Class
- Set Class Attributes (from the ones created here)
- Customize Asset/Location Forms for Categorization
- Blog: <http://www.calemeam.com/calemcustomers-2/categorization-and-category-attributes>

- Add a custom field to asset table
- Add a new status dropdown to asset
- Create category attributes and assign to an asset category
- Create category attributes and assign to an asset sub-category
- Customize list and creation forms for the asset sub-category

- User Seat for Login
- Users Logged-In
- Recycle-Bin



Login Blocked

CalemEAM

- Users are blocked if failed login consecutively for four times
- Use “admin” user to login and unblock users (uncheck “Login blocked”)
- Users not of “Active” status are blocked
- Use “Forgot Your Password?” at login screen to unblock

User

Save Cancel Customize

Ready to save changes.

Is contractor?: ☐
Is EAM crew?: ☒
Site:
App profile:
Offline rights:
No WO Email?: ☐
No SMS?: ☐
Locale:
Vendor site:
Availability (%):
Location:
Device profile:
No SW Email?: ☐
No SR Email?: ☐
Job
Job role:
Dept:
Account:
Job title:
Supervisor:
Team:
Access rights
Login allowed?: ☒
User name:
Login blocked: ☒
Login till:
Search admin:
Password: Retype:

Users Logged-In

CalemEAM







- Users actively logged-in
- Expired sessions will be logged out by login attempts

<input type="checkbox"/>	#	Full name	License	Profile	Idling	Last active
<input type="checkbox"/>	1	Administrator		Administrator	00:03:18	4/21/16 8:47 AM ...

Recovery from Recycle-Bin

CalemEAM

- Data deleted from Calem is moved to the Recycle-Bin
- Use Caution to restore data

Recycle bin (12)						
<div> Restore      Customize</div>						
<input type="checkbox"/>	#	Table name	Description	Created by	Time created	
<input type="checkbox"/>	1	cm_fav	Favorite	Administrator	4/20/16 7:30 AM Ce...	
<input type="checkbox"/>	2	cm_trn_user	Training user	Administrator	4/19/16 8:37 PM Ce...	
<input type="checkbox"/>	3	cm_in_reserved	Reserved	Administrator	4/19/16 11:09 AM C...	
<input checked="" type="checkbox"/>	4	cm_in_reserved	Reserved	Administrator	4/19/16 11:09 AM Cen...	
<input checked="" type="checkbox"/>	5	cm_wo_sched_labor	Scheduled labor	Administrator	4/18/16 7:08 PM Centr...	
<input type="checkbox"/>	6	cm_wo_meter	Meter	Calem Eam	4/17/16 4:52 PM Ce...	
<input type="checkbox"/>	7	cm_pm_doc	PM document	Calem Eam	4/16/16 10:44 AM C...	

- Create a user for login
 - Set “User name” and “Password”
- Assign an ACL profile to the user
- Assign a user seat to the user
- Login as the user

Next Module – Workflow & SchedTasks

CalemEAM

Multi-Site
Access Control

Screen & Data
Customization

Workflow
ScheduledTasks

**Thank You for Attending
the CalemEAM Training!**
Visit Us at www.calemeam.com



- Fixed User Seat – use Calem on a daily basis
- Floating User Seat – occasional users