

Skill License Expiration Management

Calem Enterprise Training

Austin, Texas

Spring, 2017



Skill license expiration management is required in some maintenance organizations. Here are sample use cases:

- **Use Case 1: Forklift driver licenses expire every three years or so. Drivers must be trained and have valid licenses.**
- **Use Case 2: A shipping company have employees on visa. The visa expiration must be managed for renewal.**

The skill license management uses configuration management database (CMDB) function in Calem Enterprise.



Step 1a. Category Attributes: Resource

CalemEAM

Set up attributes for Resources and License Expiration.

- Menu path: Admin module | Data design | Category Attributes
- Add category attributes for “Resource”.
- Next, add an attribute “User”.

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

Category Attributes

Save Cancel Customize

Ready to save changes.

Note: Resource

Id:

[Category Attributes List](#) > [Category Attributes Design](#) > Table field Create

Table field

Save Cancel Customize

Ready to save changes.

Label:

Field name:

Field type:

Length:

Lookup:

Required: ☒

Tables

Cancel

Resource (za_resource)

Custom fields

User (user_b97d)

Step 1b. Category Attributes: Expiration

CalemEAM

Set up attributes for Resources and License Expiration.

- Menu path: Admin module | Data design | Category Attributes
- Add category attributes for “License Expiration”.
- Next, add an attribute “License Expiration”.

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

Category Attributes

Save Cancel Customize

Ready to save changes.

Note: License Expiration

Id:

[Category Attributes List](#) > [Category Attributes Design](#) > Table field Create

Table field

Save Cancel Customize

Ready to save changes.

Label:

Field name:

Field type:

Length:

Lookup:

Required: ☒

Tables

Cancel

License Expiration (za_license_ex)

Custom fields

License Expiration (license_expiration_0b73)

Step 2a. Asset Category

CalemEAM

Set up asset category

- Menu path: Asset module | Codes | Categories
- Create category “Resource” with “resource” category attributes

[Categories List](#) > Category Create

Category

 Save  Cancel  Customize

 Ready to save changes.

Category:  Resource

Category attributes: za_resource 

Note: Resource category with own attributes

Step 2b. Asset Sub-Category

Set up asset sub-category

- Menu path: Asset module | Codes | Sub-Categories
- Create sub-category “Resource.LicenseExpiration” with “License Expiration” attributes

[Sub-Categories List](#) > Sub-category Create

Sub-category

 Save  Cancel  Customize

 Ready to save changes.

Sub-category: 

Category:  

Category attributes: 

Asset pattern:

Note:

Step 2c. Screen Customization

Customize screen for “Resource.LicenseExpiration”

- Menu path: Asset module | Codes | Sub-Categories
- Have “Resource.LicenseExpiration” checked, select menu “Form design”
- Next, click “Custom system” row for system default customization

Sub-Categories (20)					
Create Asset Assets Form design Customize					
☐	#	Sub-category	Category	Category attributes	Last modified
☐	1	TYRE PRESSURE GA...	TYRE PRESSURE GA...		1/23/16 1:43 PM Ce...
☐	2	SOPLADORA	SOPLADORA		1/23/16 1:43 PM Ce...
☐	3	Server	Hardware	za_server	4/5/17 10:59 AM Ce...
☒	4	Resource.LicenseExpir	Resource	za_license_expiration	5/9/17 4:11 PM Centr
☐	5	Production Line	Production Line		1/23/16 1:43 PM Ce...

Sub-Categories List > Group Lookup					
Select Cancel Customize					
Group (27)					
Group	Parent group	Type	Note	Last modified	
ADMIN	Custom system	Desktop	Root group to use for all admin gr...	1/21/15 7:49 PM..	
Administrator		Desktop		1/21/15 7:49 PM..	
Anonymous	USERS	Desktop	Seed group for anonymous users	1/21/15 7:49 PM..	
APROBADOR DE COM...	ADMIN	Desktop		1/21/15 7:49 PM..	
Custom system		Desktop	Customization/configuration share...	1/21/15 7:49 PM..	

Step 2d. Screen Customization

Customize screen for “Resource.LicenseExpiration”

- Click “Customize” highlighted in Green to customize the read screen.

The screenshot displays the CalemEAM software interface. At the top, a horizontal menu bar contains tabs for 'Main', 'Part', 'Contract', 'Meter', 'Document', 'Downtime', 'PM', 'Child Asset', 'Relation', 'Transaction', 'Usage', and 'Customize'. The 'Customize' tab is highlighted in red. Below this menu, the title bar reads 'Asset - Resource.LicenseExpiration (1 of 1)'. A toolbar contains icons for adding, deleting, and moving items, along with buttons for 'Create SR', 'Create WO', and a 'More' dropdown menu. The 'Customize' button, which is a document icon with a pencil, is highlighted with a green border. Below the toolbar, there are input fields for 'Asset #', 'Note', 'Asset group', and 'Priority'. The main area of the screen is divided into two columns of labels with corresponding input fields: 'Rebuildable?' (checkbox), 'Sub-category', 'Criticality', 'Owner', 'Barcode', 'Parent asset' on the left; and 'Status', 'Category', 'Criticality #', 'Owner site', 'Serial #', 'Asset photo' on the right.

Main		Part	Contract	Meter	Document	Downtime	PM	Child Asset	Relation	Transaction	Usage	Customize
Asset - Resource.LicenseExpiration (1 of 1)												
Asset #:				Note:								
Asset group:				Priority:								
Rebuildable?:		☐		Status:								
Sub-category:				Category:								
Criticality:				Criticality #:								
Owner:				Owner site:								
Barcode:				Serial #:								
Parent asset:				Asset photo:								

Step 2e. Screen Customization

CalemEAM

- Click “Clean Up” to remove most of the fields from the right panel
- Add “Resource” and “License Expiration” fields to the screen

The image displays two screenshots of the CalemEAM Form design interface, illustrating the process of customizing the 'CmAssetViewRead' screen.

Top Screenshot:

- Form design (CmAssetViewRead):** The 'Clean Up' button is highlighted with a red box.
- Asset > Asset Design:** The design area shows a table with the following rows:
 - (Row) **Work Order** (Cell)
 - (Row) Create Edit Delete Refresh Close (Separator) Previous Next
 - (Row) (Error message row)
 - (Row) Asset # (asset_no) Asset # (asset_no)
 - (Row) Asset group (in_id) Asset group (in_id)
 - (Row) Rebuildable? (is_rebuildable) Rebuildable? (is_rebuildable)
 - (Row) Sub-category (sub_category_id) Sub-category (sub_category_id)

Bottom Screenshot:

- Form design (CmAssetViewRead):** The 'Clean Up' button is no longer highlighted.
- Asset > Asset Design:** The design area shows a table with the following rows:
 - (Row) **Work Order** (Cell)
 - (Row) Create Edit Delete Refresh Close (Separator) Previous Next Create SR Create
 - (Row) (Error message row)
 - (Row) Asset # (asset_no) Asset # (asset_no)
 - (Row) Asset group (in_id) Asset group (in_id)
 - (Row) User (user_b97d) User (user_b97d)
 - (Row) License Expiration (license_expiration_0b73) License Expiration (license_expiration_0b73)
 - (Row) Time created (created_time) Time created (created_time)
 - (Row) Last modified (modified_time) Last modified (modified_time)

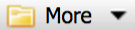
Step 2f. Screen Customization: Create

CalemEAM

- Click “+” to launch creation screen for customization
- Click “Customize” (highlighted in green) to customize the “Create” screen

Main Part Contract Meter Document Downtime PM Child Asset Relation Transaction Usage **Customize**

Asset - Resource.LicenseExpiration (1 of 1)

Asset #: Note:

Asset group: Priority:

User:

License Expiration:

Time created: Created by:

Last modified: Modified by:

[Asset](#) > Asset Create

Asset - Resource.LicenseExpiration

 Save  Cancel  **Customize**

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

Asset #: Note:

Location:   Service site:

Priority:

Asset group:   Status:

Step 2g. Screen Customization: Create

CalemEAM

- Follow the same steps above for read screen to customize the “Create” screen to have “User” and “License Expiration” fields.
- Next, click “Cancel” to close this screen. Click “Edit” to launch edit screen and customize it similarly.

[Asset](#) > Asset Create

Asset - Resource.LicenseExpiration

Save Cancel **Customize**

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

Asset #:		Note:	
Location:		Service site:	
User:			
License Expiration:			

[Asset](#) > Asset Edit

Asset - Resource.LicenseExpiration

Save Cancel **Customize**

Value is required: Asset #

Asset #:		Note:	
Asset group:		Priority:	
User:			
License Expiration:			

Step 2h. Create Resource Item

CalemEAM

- Menu path: Asset module | Codes | Sub-Categories
- Have “Resource.LicenseExpiration” checked, click “+” menu to create an a resource asset for license expiration.

Sub-Categories (20)						
     Create Asset  Assets  Form design  Customize						
☐	#	Sub-category	Category	Category attributes	Last modified	
☐	1	TYRE PRESSURE GA...	TYRE PRESSURE GA...		1/23/16 1:43 PM Ce...	
☐	2	SOPLADORA	SOPLADORA		1/23/16 1:43 PM Ce...	
☐	3	Server	Hardware	za_server	4/5/17 10:59 AM Ce...	
☒	4	Resource.LicenseExpir	Resource	za_license_expiration	5/9/17 4:11 PM Centr	
☐	5	Production Line	Production Line		1/23/16 1:43 PM Ce...	

[Sub-Categories List](#) > Asset Create

Asset - Resource.LicenseExpiration

 Save  Cancel  **Customize**

 Ready to save changes.

Asset #: **Note:**

Location:  **Service site:** 

User: 

License Expiration: 

Step 3a. PM Setup

- Menu path: PM module | PM Plan
- Create a PM Plan with a repeat schedule of three years.

[PM Plan list List](#) > PM Plan Create

PM Plan

Save Cancel Customize

Ready to save changes.

Plan #:

Subject:

Status:

PM type:

Category:

WO type:

Duration (hours):

Schedule type:

Release type:

Review reqd?: ☐

Reference?: ☐

Site access?: ☐

No default steps?: ☐

Sort #:

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

☐ Every weeks on

Repeat schedule:

☒ Every months on

☐ Day of week

☒ Day of month

Step 3b. PM Setup

- Go to the “PM” tab for the PM Plan created
- Click “+” to add a PM

PM PlanPMLaborMaterialStepDocumentClonedLogPermitCustomize

PM Plan (1 of 1)

 Customize

Plan #:

Subject:

PM list (1)

 Customize

☐	PM #	Asset #	Location	Subject	Status	Next due	Last modified
☐	Forklift-License-010	DemoTech's Lice...	HQ.BLD001	Forklift License expiration tracking	Active	5/9/20 4:00 P...	5/9/17 4:58 PM C...

Step 3c. PM Setup

- Select “DemoTech’s License” as the asset for this PM
- Set “Next due” to May 9, 2020
- Set “Days ahead” to 180 days so the PM is generated as a work order 6 months before the license expires.

[PM Plan](#) > PM Create

PM

 Save  Cancel  Customize

 Ready to save changes.

Asset or Location (not both)

Asset #: 

Location: 

Next due: 

Days ahead:

Release count:

Last released: 

Last done: 

Work Order Release

Status:

Priority:

WO Status:

Origination:

Requester: 

Assigned to: 

Team assigned: 

Account: 

Dept: 

PM?: ☒

Step 4. Work Order

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- A work order is generated 6 months before DemoTech's forklift license expires. It gives plenty of time to arrange DemoTech to get the license renewed.
- To streamline the work order processing, assign someone at the PM to the work order so you can have an owner when the PM is generated as a work order.

- You can view the “Resource.LicenseExpiration” asset at <https://demo.calemeam.com>
- Category attributes creation is not available in the demo site for “DemoTech” login.
- Calem Enterprise customers may test drive the category attributes creation at your Calem services with an admin profile.

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