Part 2.0: Maintenance Functions – UI & Asset

Calem Enterprise Training

Summer 2024

Austin, Texas



Goals – User Interface

I know how to search a list (FreeForm, SearchRow, Advanced)

I know how to use forms (List, Read, Multi-Tab, Detail Lists)

I know how to create/edit an object (main and detail objects)

I know how to save an advanced search for re-use

I know how to pin and close form tabs of the desktop

Goals – Assets

- I know how to setup Asset Module
- I know how to create Class tree
- I know how to create asset items
- I know how to create location tree
- I know how to create assets
- I know how to create asset meters
- I know that how to populate asset module via excel files

Calem Enterprise Training



Hands-On Lab

• The Sandbox of your service is the ideal place to do hands-on lab.



Agenda – Maintenance Functions

- CalemEAM Overview
- Product Overview
- Maintenace Functions:
 - Asset and Locations
 - Preventive Maint Schedules and Failures
 - Work Order, Service Request and Change Mgmt
 - Work Order Scheduling
 - Dashboard

CalemEAM – Overview

CalemEAM



COMPANY

- Initiated in 2006.
- CalemEAM v1.0 Released in May 2007.
- A Texas Corporation since 2007.

MISSION

 Better EAM/CMMS Solutions and Better Customer Services

PRODUCT

- Calem Enterprise Subscription:
 - Calem Enterprise
 - Maintenance & Upgrade
 - Technical Support

Product Overview – Architecture



Product Overview – Functions

Asset and Location	Maintenance Schedules	Contract and SLA
Work Order	Service Request	Change Management
Inventory and Warehouse	Requisition and Purchase Order	Doc, Project, Integration, etc.
Multi-Sites Access Control	Screen and Data Customization	Workflow Scheduled Tasks
Web Client	Mobile Client	Offline Client

User Interface – Form Flows



			0	My assignmen	t (89)								
٢	🕽 🤤 😰 📓 📙 Print All 📙 Get All 🔍 🔍 🤍 🖾 More 👻 🔯 Customize												
	#	Wo #	Flag	Asset Tag	Location	Status	Priority	PM?	Subject	Sched start	Need by	Site	Last modified
				401402									
	1	143784	1	401402-17	B02.HQ	Approved	P4		PM_Weekly	7/23/18 12:00 P	7/23/18 8:00 P	MySite	7/23/18 9
	2	113910		401402-17	B02.HQ	Released	P4		PM_Weekly	10/3/16 12:00 P	10/3/16 8:00 P	MySite	7/20/18 7
	3	142162		401402-17	B02.HQ	In-process	P4		PM_Weekly	7/16/18 12:00 P	7/16/18 8:00 P	MySite	7/15/18 6
	4	113106		401402-17	B02.HQ	Approved	P4		PM_Weekly	9/12/16 8:00 PM	9/12/16 8:00 P	MySite	7/14/18 6
	5	113505	_	401402-17	B02.HQ	Approved	P4		PM_Weekly	9/19/16 8:00 PM	9/19/16 8:00 P	MySite	7/13/18 8
	6	113506		401402-17	B02.HQ	Approved	P4		PM_Weekly	9/26/16 8:00 PM	9/26/16 8:00 P	MySite	7/13/18 8
	7	113911		401402-17	B02.HQ	Approved	P4		PM_Weekly	10/10/16 12:00	10/10/16 8:00	MySite	7/13/18 8
	8	113912		401402-17	B02.HQ	Approved	P4		PM_Weekly	10/17/16 12:00	10/17/16 8:00	MySite	7/13/18 8
	9	114684		401402-17	B02.HQ	Approved	P4		PM_Weekly	10/24/16 12:00	10/24/16 8:00	MySite	7/13/18 8
	10	115131		401402-17	B02.HQ	Approved	P4		PM_Weekly	10/31/16 12:00	10/31/16 8:00	MySite	7/13/18 8
	11	115570	1	401402-17	B02.HQ	Approved	P4		PM_Weekly	11/7/16 12:00 P	11/7/16 8:00 P	MySite	7/13/18 8
	12	115825	-	401402-17	B02.HQ	Approved	P4		PM_Weekly	11/14/16 12:00	11/14/16 8:00	MySite	7/13/18 8

- #1 Efficient search scalable to tens of thousands rows
- #2 Right-Click list caption to add a field for search
- #3 Hide by default

\subset		#	1 👩	My assignment	: (20)	Search								
💿 👄 📚 🛤 #3 🚍 🔎 🚔 Print All 🔎 Get All 🔍 🔍 📮 Status log 💽 Customize					More - #2	Drodown N	1enu for Checked	Rows						
	#	Wo #	Flag	Asset #	Location	Status	Priority	0	Approve		Sched start	Need by	Site	Last modified
	1	8722		200-001	B02.HQ	In-process	P1	_	Release		10/1/13 9:00 AM	1/1/10 12:00 A	MySite	4/1/16 6:
	2	76331		0911-2345	B02.HQ	Approved	P1		In-process	1 job for 0911	. 7/10/14 4:01 AM	4/26/14 4:14 P	MySite	2/5/16 2:
	3	4461		200-001	B02.HQ	In-process	P3	«	Complete		10/12/15 9:00 A	7/5/09 12:00 A	MySite	4/1/16 6:
	4	82909		100HP-008	CA.Building2	Approved	P3	\bigcirc	Accept	ed Plan	11/12/14 1:00 A	11/12/14 1:00 A.	My TX site	2/22/16 6
	5	83256		100HP-008	CA.Building2	Approved	P3		Close WO	ed Plan	12/10/14 1:00 A	12/10/14 1:00 A.	My TX site	2/22/16 6
	6	84902		100HP-008	CA.Building2	Approved	P3	1	Edit	ed Plan	1/14/15 1:00 AM	1/14/15 1:00 A	My TX site	2/22/16 6
	7	90130	6	100HP-008	CA.Building2	Approved	P3		Plan Labor	ed Plan	5/13/15 1:00 AM E	5/13/15 1:00 AM	EMy TX site	2/22/16 6:14
	8	92850	1	100HP-008	CA.Building2	Approved	P3		Assian/Schedule	ed Plan	7/8/15 1:00 AM Ea	:7/8/15 1:00 AM E	a My TX site	2/22/16 6:14
	9	94744		100HP-008	CA.Building2	Approved	P3	L.	ICSLIDE ZHU W	ed Plan	8/12/15 1:00 AM	8/12/15 1:00 A	My TX site	2/22/16 6
	10	95497		100HP-008	CA.Building2	Approved	P3		Test for 2nd W	ed Plan	9/9/15 1:00 AM	9/9/15 1:00 AM	My TX site	2/22/16 6
	11	97308		100HP-008	CA.Building2	Approved	P3		Test for 2nd W	ed Plan	10/14/15 1:00 A	10/14/15 1:00 A.	My TX site	2/22/16 6
	12	98663	1	100HP-008	CA.Building2	Approved	P3		Test for 2nd W	ed Plan	11/11/15 1:00 A	11/11/15 1:00 A.	My TX site	2/22/16 6

- **#1** Free Text Search and Advanced Search
- #2 More Menu for List (multiple checked rows)
- #3 Menu to Create, Delete, Refresh, Close, Print, etc.

User Interface – Creation/Edit View

My assignment List >	Create WO Create Breadcrumb trail							
Create WO	Create WO							
📔 Save 🔀 Cance	I 😡 Customize Save" is enabled when data is valid to save							
The field value for	or the lookup is not valid.: Asset # Data validation indicator							
Priority:	P4 Review read	?:						
Category:	Detective Auto-Completion WO type:							
Asset #:	🖣 🗚 🔤 🔄 🔄 🔤							
Location:	11.CA.AC-001, Building, OH-CA-001							
Failure:	AC 2, JJ.100HP.2000, B02.HQ							
Subject: 🧕	ei							
Description: •	9							
Deventoria #1		/						
Parent wo #:								
Origination								
Origination:	Other •							
Requester: 🧕	Administrator	E2						
Time requested:	4/14/16 🛗 At: 5:12 PM Central Need by:	At: Central						

- Breadcrumb
- "Save" menu enable/disable
- Data validation indicator
- Lookup button and auto-completion

User Interface – Multi-Tab Main Tab

Main Part Cor	ntract Meter Documen	t Downtime	PM	Child Asset	Relation	Transaction	Customize	Tabs
Asset (6 of 4421)								
🧊 🗷 î 🗼 🎕	Create SR 🔲 Create WO	🔄 More 🔻	📝 Custom	nize Men	iu			
Asset #: O SP02-N	1-PORT	Note: Mercur	y Console	2006				
Asset group: 🧕 MERCU	IRY.CONSOLE.2006	Priority: Critical				Read	View	
Rebuildable?:				Status:		In service		
Sub-category:				Category:				
Criticality:	C1			Criticality	#:	75		
Owner:				Owner site				
Barcode:	SP02-M-PORT			Serial #:				
Parent asset:	AS-SHIP-01			Asset phot	:0:			
Position:				Doc URL:				
Location: 🧕	CA.Building2			Site:		<u>My TX site</u>		
Service site:				Company:		<u>JJ-Chain</u>		
Model:				PO #:				
Store:				Locator:				
Meter 1:				Meter 2:				
Reading 1:				Reading 2:	:			
Warranty								
Start date:				Purchase of	late:			
Warranty start:				Warranty e	end:			

- Tabs
- Menu
- Data Read View

User Interface – Multi-Tab Detail Tab

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Main Part Contract Meter Documer	nt Downtime PM Child Asset	Relation Transac	tion Customize				
Asset (6 of 4421)			Main Data Row				
🧊 🗷 👔 🌡 🎪 Create SR 📗 Create WO	📔 More 🔻 📝 Customize						
Asset #: • SP02-M-PORT	Note: Mercury Console 2006						
Asset group:	Priority: Critical						
Image: Asset Part (12) List View 1							
💿 🥥 🕵 🔯 Customize							
Part Qty Uom Stock type	Note	Site Store	Locator	Qty in stock			
I000-PUMP-SEA 4 G Stock	Pump seal	MySite_CA CA.Sto	re	3			
I000-PUMP-SEA 4 G Stock	Pump seal	MySite QA-Sto	re	2			
I000-PUMP-SEA 4 G Stock	Pump seal	MySite MainSt	ore A1.S1	19			
Asset Tool (0)			List View 2				
💿 🤤 📚 🔯 Customize							
D Tool Qty	Uom Stock type	Item	Note				
		No results fo	ound.				

• Main Data + Detail Data Lists

User Interface – Advanced Search

- Set up "Search admin" permission at "User" form
 - No Admin: saved search for personal use
 - Group Admin: saved search for same group use
 - System Admin: saved search for everyone

WO Home > Select Search	
My Search (0)	Shared Search (8)
📀 🗊 🤤 🙀 📝 Customize	💿 🗊 🤤 🍰 Toggle Default 🔯 🔀 📝 Customize
Search	Search Custom Defaults
	01-New
No results found.	02-Approved
	03-Released In Process On Hold
	O4-Completed
	05-Closed
	06-PMs
	07-Non-PMs
	08-Part Repair

User Interface – Hands-On Lab

- Create a service request
- Use lookup form to pick up an asset
- Search Asset in list row search
- Search SR in free text search
- Search SR in search form
- Launch "Open WO" and "Open SR" List Forms
 - Open a WO data record
 - Open an SR data record
 - Switch between SR and WO multi-tab forms
- Pin "Open WO" list to prevent it from being auto-closed
- Close all forms by a right-click menu on form tabs



Product – Asset Module

- Build Asset/Location Hierarchy
- Browse Asset/Location in Trees



Asset Module – Class & Item

- Asset Class grouping assets & locations
 - Reporting by Class
 - Attributes by Class
- Asset Item identical assets by manufacturer model
 - Optional to implement
 - Driven by Spare Parts
 - Assets of the same Asset Item sharing the same spare parts



Asset Module – Class & Item Menu

- Asset Class grouping assets & locations
 - Asset | Open | Asset Class Tree
 - Organization | Codes | Class List
- Asset Item identical assets by manufacturer model
 - Asset | Codes | Asset Item
 - Inventory | Items

Asset Module – Asset Setup

- Asset Class
 - Define asset grouping hierarchy
 - Define asset specific attributes if needed (advanced topic): <u>http://www.calemeam.com/calemcustomers-</u> <u>2/categorization-and-category-attributes</u>
- Asset Item identical assets for spares/documents
 - Specify spares at asset items (not individual assets)
 - Upload manuals/pictures at asset items
 - <u>http://www.calemeam.com/calemcustomers-2/asset-part-usage-and-bill-of-material</u>

Asset Module – Vendor/Manufacturer

- Set up vendors and manufacturers
- Use Step 1 of the blog: <u>http://www.calemeam.com/calemcustomers-</u> 2/vendor-setup-for-inventory
- Define "Class", "Model", and "Manufacturer" at "Asset Item"
 - They are copied to asset when asset item is set.

Asset Module – Location Hierarchy

- Locations are physical places where assets are deployed
- Locations are required to create assets
- Location hierarchy can be defined to group locations
 - For example:
 - A facility can have buildings
 - A building can have floors
 - A floor can have rooms
 - Assets can be deployed at any location

Asset Module - Location

- Class asset location or configuration element (CE)
 - Use Location as CE to store asset configuration parameters
 - Use CE when assets are portable and replaced
- Location Group locations share same spare parts
- Use "Parent" to define location hierarchy

Location list List > Loc	cation Create				
Location					
E Save 🗶 Cancel	😺 Customize				
Value is required:	Location				
Location: • 🧉	1		Note:		
Site: • 🦉	1	Eo	Parent:		
Service site:		27	Categorization:		
Status:	In Service		Loc group: 🧕	9	-6
Priority:	•		Photo:		
Owner:		10	Owner Group:		
Inventory?:					
Warranty					
Start date:			Purchase date:		
Warranty start:	12		Warranty end:	12	

Asset Module – Upload Location

- Prepare location list in Excel Templates (available from Calem)
- Upload excel file to Calem (Integration | Data Upload)

Site (site_idsite)	Location (location)	Note (note)	Loc group (type_idtype)	Owner user (owner_user_idfull_name)	Dept (dept_iddept)	Description (d
MySite	10 - ServerRoom	Server room 10	IT			

Asset Module – Location Form

- A location can have: Assets, PMs, Meters
- A location can be under contracts
- A location can have docs and file attachments

Location Main	Asset Document Contract PM	Meter Customize	
Location (1 of 70)			
😺 î 🌡 🗵	🗔 Status log 🗔 Activity log 🗔 Chang	es (MOC) 🔯 Customize	
Location: B01.L	obby	Note:	
Site: O MySit	<u>e</u>	Parent:	
Service site:			
Company:	CalemEAM Inc.	Loc group: 🧕	Workshop
Status:	In service	Loc category:	
Priority:	Critical	Photo:	
Owner:	Jason Bennett	Owner site:	<u>MySite</u>
Inventory?:		Code:	
Warranty			
Start date:		Purchase date:	
Warranty start:		Warranty end:	
Maint. Cost			
Labor hrs:		Material cost (USD):	
Labor cost (USD):		Maint. cost (USD):	
Codes			
Cost center:		Dept:	
Account:			

Asset Module – Location Tree

- Site, Location, Asset hierarchy
- Location and Child locations
- Assets and Child assets



Product – Asset Class View

• Asset Class Hierarchy

Compression (1 of 4) CRC LinuxClone Lay2Switch M-560 MC	
CRC HW-Linux LinuxClone Lay2Switch M-560 MC	
HW-Linux LinuxClone Lay2Switch M-560 MC	
LinuxClone Categorization: LinuxClone Lay2Switch Full Path: HW-Linux/LinuxClone MC HW-Linux/LinuxClone	
Lay2Switch M-560 MC	
MC HW-Linux/	
MC MC	11
MOC Asset (7)	
📫 My-cat3	
MyCat.001	
Network Device # Asset Tag Asset Item Status Location Owner Group Last modified	
Buz.RQ 9/18/19 1:19 PM	
Image: Resources 2 100HP-005 JJ.100HP.2000 In-Service B02.HQ 9/18/19 1:19 PM	
Index 3 100HP-008 JJ.100HP.2000 Not-In-Se B09.NEW 9/18/19 1:19 PM	
ASSEMBLY 4 100HP-008-C1 JJ.100HP.2000 In-Service B09.NEW 9/13/19 3:15 PM	
Image: BLD.PROD 5 A0000650 1000-PUMP-SEAL In-Service B02.HQ 9/18/19 1:19 PM	
Image: Second	
my-cat-3-test 7 LINUX-001 Asset-Item-001 In-Service B09.NEW 9/5/19 3:44 PM	

Product – Asset Floor Plan View

CalemEAM

• View Assets and Locations in Floor Plan Images



Product – Asset Map View

CalemEAM

• View Assets and Locations in Maps



Asset Module – Create Asset

Asset list List > Asset Crea	ate					
Asset						
Save 🗶 Cancel	🛃 Customize					
The field value for the	e lookup is not valid.: Location					
Asset Tag:			Note:			
Location: • 🦉	1	17 17	Service site:		=	
Priority:	P2 (Production)		Status:	In Service	•	
Asset group: 💿 🦷 🍕	1	B		Barcode:		
Categorization:		E7	Parent asset:			
Serial # (free form):			PO #:			
Model:			Asset photo:			
Owner:		E 0	Owner Group:			
Warranty						
Start date:	12:		Purchase date:	1	- 	
Warranty start:	12:		Warranty end:		- 	
Vendor site:		Eq				
Manufacturer site:		E				

- Asset Tag leave blank for auto-numbering
- Define "Note", "Location", "Serial #", "Class", "Model", and "Manufacturer"
 - Define "Class", "Model", and "Manufacturer" at "Asset Item" if implemented

Asset Module – Upload Asset

- Prepare asset list in Excel Templates (available from Calem)
- Upload excel file to Calem (Integration | Data Upload)

Asset Group (in_idin_no)	Model No (model_no)	Note (note)	SERIAL NO (serial_no)	Asset no (asset_no)	Location (location_idloc	aManufacturer (manufacturer_
CRC-UNIT	GG199A-C10	GG199A-C10	400848-011	CRU-6	10-PROD	ACME

Data Upload								
E Save Cancel 🔯 Customize								
Ready to save changes.								
File: • Choose File No file chosen Note: •								

Asset Module – Asset Parts

- Asset Spares can be defined per asset
- If implemented Asset Spares can be defined at Asset Items
- Spares and their availability are displayed
- Asset Part report at: Asset | Report | Asset Parts

Main Part Contract Meter Docume	nt Downtime PM	Child Asset Relation	Transaction	Customize						
Asset (10 of 4421)										
🤯 🗷 👔 🌲 🎪 Create SR 📗 Create WO	🔄 More 🔻 📝 Custo	mize								
Asset #: • MySite-05617	Note: Auto-generated	serial no.								
Asset group: • MERCURY-PROD.2006	Priority: Critical									
Asset Part (9)										
💿 🤤 📚 🔯 Customize										
Part Qty Uom Stock type	Note	Site	Store	Locator	Qty in stock					
JJ.WATER-PUMP 4	JJ Water Pump 2001	MySite	QA-Store		1					
JJ.WATER-PUMP 4	JJ Water Pump 2001	MySite	MainStore		1					
JJ.WATER-PUMP 4	JJ Water Pump 2001	MySite	MainStore		6					

Asset Module – Contract & Depreciation

- Contracts for the asset if applicable
- Depreciation attributes at asset

Main	Part	Contra	ict]	Meter	Docume	ent Dov	vntime	PM	Child Asset	Relation	Transaction	Customize	
Asset (1 of 1)													
🔯 🗷 👔 👃 🎪 Create SR 📗 Create WO 📔 More 🔻 📝 Customize													
Asset #:	Asset #: • A004669 Note:												
Asset gro	oup: 😐	ITM-001				Priority:	Critical						
Contrac	t (1)												
0 0	*	🔯 Custor	nize										
Co	ntract		Not	e			Status		Start date	End date	Last modi	fied	
мс	-001						Valid				4/15/16 7:	43 PM C.	

Asset Module – Meter & Trigger

- Meters attached to the asset or location
- Trigger events for the meters

Main Part	Contract Meter	Document	Downtime	PM Chi	ld Asset	Relation	Transaction	Customiz				
Asset (1 of 1)												
🔯 🗶 🏌 🖡	🔯 🗵 👔 🌡 🎪 Create SR 🔲 Create WO 🔚 More 🔻 🔯 Customize											
Asset #: 🧕 🛛 🗛	04669	Note	e:									
Asset group: ITM-001 Priority: Critical												
Asset Meter (0)												
o 💿 🛸 📑	Readings 📀 Add re	ading 🛛 🔯 Cust	tomize									
Meter #	Reading	Tim	ne taken	Note			Rea	ding type				
Custo	Mete omize	r Events (0)				No r	esults four	ıd.				
Event	Meter #	Trigger	Reading	Time c	reated							

Asset Module – Doc & Attachment

- Docs are linked to its Asset Group
- Attachments are specific to the asset

Main Part	Contract Meter Docum	ent Downtime PM Child Asset Re	ation Transaction Custon	nize						
Asset (1 of 1)										
😺 🗶 🏌	👃 촗 Create SR 📗 Create WO	🔁 More 🔻 😿 Customize								
Asset #: 😐	A004669	Note:								
Asset group: ITM-001 Priority: Critical										
Group doc (0)										
چ 🥥	🔯 Customize									
Seq	Document	Note	Item	Last modified						
			No results found.							
Attachment (0)									
0 😑 🗟	🖉 View file 🛛 🖞 Download All	Customize								
File	Ν	ote	Last modified							
			No results found.							

Asset Module – Downtime & Comment

- History of asset downtime
- History of comments

Main	Part	Contra	act	Meter	Documen		Downtime	Р	м	Child Asset	Relation	Transaction	Customize	
Asset (1 of	1)													
🔯 🗷 👔 🌡 🎪 Create SR 📗 Create WO 📔 More 🔻 🔯 Customize														
Asset #: • A004669 Note:														
Asset group: ITM-001 Priority: Critical														
Asset Dov	Asset Downtime (0)													
0 🥥	 O O I I Customize 													
Start	Start time End time Total hrs Total mins Note Last modified													
Comment	Start time Inder mins No results found. No results found. Comment (0) Image: Customize													
Com	ment										Last modified			

Asset Module – PMs

• PMs defined for the asset

Main	Part	Contract	Meter	Document	Downtime	РМ	Child Asset	Relation	Transaction	Customize	Ì	
Asset (1 of	1)											
🤯 🗙	1	🖄 Create	e SR 📗 Cr	eate WO [🛯 More 🔻 [对 Custo	mize					
Asset #:	Asset #: • A004669 Note:											
Asset grou	p: • <u>I</u>	<u>TM-001</u>		Pri	ority: Critical							
	Image: Book of the second s											
۲	1	c 😡 🧔	Customize									
□ #	PM #		Plan #	Subject		Status	PM code	PM Sched	Next due r	Last La eleased do	st Site	Last modified
								No	results found.			

Asset Module – Child Assets

• Child assets

Mair	n Part Contra	act Meter Document	Downtime PM	Child Asset	Relation T	ransaction Customi	ze		
Asset (2 of 4421)								
	🚺 👔 📕 🎪 Cra	eate SR 📗 Create WO	🛿 More 🔻 🔯 Custon	nize					
Asset #: • SHIP-TEST-001 Note: Ship test									
Asset group: AS-SHIP-2350 Priority: Critical									
Child a	asset (10)								
	🔯 Customize								
#	Asset #	Note	Location	Site	Status	Asset group	Owner	Last modified	
1	MySite-00495	Mercury Console 2006	CA.Building2	My TX site	In service	MERCURY.CONSOLE		8/21/14 10:36	
2	MySite-00493	Mercury Console 2006	CA.Building2	My TX site	In service	MERCURY.CONSOLE		8/21/14 10:36	
3	MySite-00497	Production system of Mercury	CA.Building2	My TX site	In service	MERCURY-PROD.200		4/13/16 1:19 P	
4	MySite-00490	Mercury Console 2006	CA.Building2	My TX site	In service	MERCURY.CONSOLE		8/21/14 10:36	
5	MySite-00498	Production system of Mercury	CA.Building2	My TX site	In service	MERCURY-PROD.200		4/13/16 1:19 P	
6	MySite-00492	Mercury Console 2006	CA.Building2	My TX site	In service	MERCURY.CONSOLE		8/21/14 10:36	
7	MySite-00494	Mercury Console 2006	CA.Building2	My TX site	In service	MERCURY.CONSOLE		8/21/14 10:36	
8	MySite-00496	Mercury Console 2006	CA.Building2	My TX site	In service	MERCURY.CONSOLE		8/21/14 10:36	
9	MySite-00489	Mercury Console 2006	CA.Building2	My TX site	In service	MERCURY.CONSOLE		8/21/14 10:36	

Asset Module – Geolocation

Latitude and Longitude for Asset and Location

• See blog: <u>http://www.calemeam.com/calemcustomers-2/how-to-implement-geolocation-in-calem</u>

Asset Module – Asset Transactions

• Asset move tracking

Main Part	Contract	Meter Docum	nent Downtime	PM Child	Asset Relation	Transaction	Customize			
Asset (2 of 442:	L)									
🤯 🗶 🥼	🔯 🗷 👔 🧎 🎪 Create SR 📗 Create WO 🔚 More 🔻 🔯 Customize									
Asset #: 🧿	sset #: • SHIP-TEST-001 Note: Ship test									
Asset group: 🧕	AS-SHIP-2350		Priority: Critica	l						
Asset Tran. (2)										
📚 📝 (Customize									
Tran #	Туре	Asset #	To location	To site	Shipper	Tracking #	RMA	Last modified		
T000025	Send for repair	SHIP-TEST-001		FARADAY				7/13/14 4:53 P		
T000026	Receive repair	SHIP-TEST-001	CA.Building2	MySite	Abco			7/13/14 4:55 P		

Asset Module – Asset Activity Log

- Activity Log Work orders performed on the asset
 - Open WO show WOs not completed
 - No Child exclude activity logs of child assets
 - Show All show all WO and include activity logs of child assets

<u>Asset</u> >	Activity log Li	st									
Activity	y log (64)										
E Show All 🔍 No Child 🔍 Open WO 🔯 Customize											
#	Wo #	Priority	Status 🔽	Resolution	Total (USD)	Subject	Last completed	Asset #	Location		
1	98606	P1	Released			test		SHIP-TEST-001	CA.Building2		
2	85712	P4	New			test		SHIP-TEST-001	CA.Building2		
3	85711	P4	New			test		SHIP-TEST-001	CA.Building2		
4	85710	P4	New			test		SHIP-TEST-001	CA.Building2		
5	103542	P4	New			My testing it		SHIP-TEST-001	CA.Building2		
6	97604	P3	New			Monthly 4th Monday maintena		SHIP-TEST-001	CA.Building2		
7	74012	P4	New			My WO test		SHIP-TEST-001	CA.Building2		
8	95057	P2	In-proce			Monthly 4th Monday maintena	8/23/15 7:27 PM E	SHIP-TEST-001	CA.Building2		
9	31981	P3	Closed		(463.4974)	PM Plan from PMProcedures	7/28/14 9:13 AM E	SHIP-TEST-001	CA.Building2		

Asset Module – Asset Status Log

• Asset status changes

<u>Asset</u> > Status lo	og List									
Status log (10)										
🔀 🔯 Ustomize										
From status	To status	Prev. owner	New owner	Changed by	Time created					
In repair	In service	Calem Test-A	Calem Test-A		8/21/14 3:24 PM C					
In repair	In service	Calem Test-A	Calem Test-A	Calem Eam	8/21/14 3:24 PM C					
In repair	In repair	Dan	Calem Test-A	Calem Eam	8/21/14 1:24 PM C					
In service	In repair	Dan	Dan	Calem Eam	8/21/14 10:37 AM					
In service	In repair	Dan	Dan	Calem Eam	8/21/14 10:37 AM					
Offsite repair	In service	Dan	Dan	Administrator	7/13/14 4:55 PM C					
Offsite repair	In service			Administrator	7/13/14 4:55 PM C					
In service	Offsite repair	Dan	Dan	Administrator	7/13/14 4:53 PM C					
In service	Offsite repair			Administrator	7/13/14 4:53 PM C					
In service	In service		Dan	Administrator	6/14/14 3:06 PM C					

Asset Module – Asset Status Report

- Activity Status Report
 - Meters and readings
 - PM schedules
 - Work orders
 - Parts usage
 - Service requests
 - Include child assets by default



Asset Module – History Logs

- Activity Log work orders at a location
- Status Log status changes
- Location Status Report a summary reports of meters, PMs, work orders, service requests and material used.

Asset Module – Meter Group

- Meter Group same reading types, validation and triggers
- Reading Type
 - Usage (e.g. trip meter; to drive maintenance schedules)
 - Absolute (e.g. odometer; to drive maintenance schedules)
 - Gauge (e.g. temperature; to drive meter triggers)
 - Level (e.g. oil level; to drive usage meters)

Meter groups List > Meter group Create					
Meter group	Meter group				
🔚 Save 🗶 Cancel	E Save Cancel 🐼 Customize				
Value is required: Meter group					
Meter group: 💿 🍕					
Note:					
Reading type:	Absolute -				
UOM:	Absolute				
Pattern:	Usage				
Sequence:	Level				
Validate reading:	Gauge				
Range type:	Below (< Low)				
Low:					
High:					

Asset Module – Meter Trigger

- Meter Triggers
 - Creating work orders
 - <u>http://eam.calemeam.com/index.php/calemcustomers-</u> 2/meter-triggered-work-orders

Meter group > M	leter trigger Create		
Meter trigger			
E Save Cancel Save Customize			
Value is required: Trigger			
Trigger: 💿 🧉			
Asset group:			
Range type:	Below (< Low)		
Low:			
High:			
Note:			

Asset Module – Meter Reading Report

- Readings for a given time period
- Export to excel for trending analysis

Meter Readings				
🔚 Save 🗷 Cancel 🔯 Customize				
Value is required: Tran. start				
Tran. start: • 🍕 🗾 📆				

Asset Module – Meter Readings

- Asset Meter Form
 - Add readings
 - Batch upload meter readings
 - <u>http://eam.calemeam.com/index.php/calemcustomers-</u> <u>2/scheduled-upload-of-meter-readings</u>

Asset > Meter reading Create				
Meter reading				
🔚 Save 🗶 Cance	el 🔯 Customize			
Value is required: Reading				
Reading: 🧕 🕖	No readings recorded.			
Note:				
Read by: 🧕	Administrator			
Time taken: 🧕	4/14/16 🕂 At: 10:24 PM Central			
Calib. phase:	(None) 🔻			
Is rollover:	Rollover count:			

Asset Module – Hands-On Lab

CalemEAM

Hands-on

- Create a node in Class tree
- Create an Asset Item
- Create a Location Group
- Create a Location with Class and location group
- Create an Asset with Class and asset item
- Create a Meter Group
- Create a meter
- Add meter readings
- Prepare locations in Location Excel Template
- Prepare Assets in Asset Excel Template

Next Module – Preventive Maintenance

• We will cover Maintenance Schedules in next session.



Optional – Asset Relationship

- Define the relationship at Class
- Define the relationship at asset level
- Use the relationship to analyze asset dependencies

Main Part Contract Meter Document Downtime PM Child Asset Relation Transaction Customize								
Asset (10 of 4421)								
🔯 🗵 👔 🌡 🎪 Create SR 🔲 Create WO 📴 More 👻 🔯 Customize								
Asset #: 🧕	MySite-05617		Note:	Auto-gener	ated serial no.			
Asset group: MERCURY-PROD.2006 Priority: Critical								
Relation (5)								
#	Asset #	Relation	To Asset	#	Last modified			
1	MySite-05617	Manages	5017		4/7/16 9:12 AM C			
2	MySite-05617	Supports	4984		3/31/16 6:43 AM			
3	MySite-05617	Supports	4983		3/31/16 6:43 AM			
4	MySite-05617	Manages	5015		4/7/16 9:12 AM C			
5	MySite-05617	Manages	5016		4/7/16 9:12 AM C			

Optional – Asset Structure

- Asset Structure Component Template (ASC)
 - Model an asset with a hierarchy of child assets and meters
 - E.g.: a ship with 3 engines, 3 gear boxes, 30 meters
 - Define an asset structure for the ship
 - Simplify the creation of a ship asset all child assets/meters are created.

Main	sset SC Meter SC Asset/Meter Customize		
Asset structure (1 of 1)			
🗊 î 🌡	🔀 🔯 Customize		
Asset SC: 🧕	AS-SHIP-V2		
Note:	Cloned from AS-SHIP		

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

