

Part 2.2: Maintenance Functions – Contract

Calem Enterprise Training

Summer 2024

Austin, Texas



Asset and
Location

Maintenance
Schedules

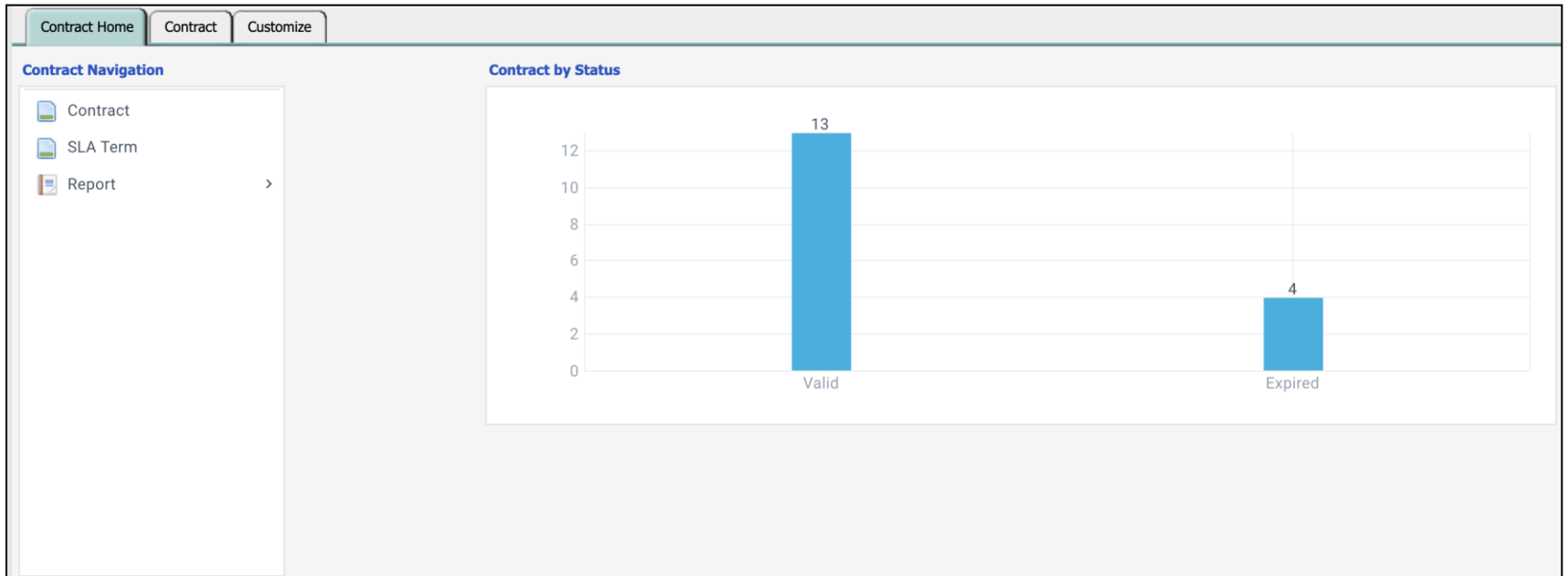
Contract and SLA

Work Order

Service Request

Change Management

Vendor contract or SLA contract



Contract Module - Contract

- Default SLA Enforcement
 - Preventive Maintenance WO (PM)
 - Corrective Maintenance WO (CM)
- Cost Monitoring
- Credit On-Hold
- Date Range

Main				SLA		Asset		WO		Contact		Document		Business Lines		Customize	
Contract (1 of 15)																	
Contract: <input type="radio"/> CONTRACT-001																	
Note: Testing service site as vendor site																	
Vendor site: MySite						Vendor: CalemEAM Inc.											
Site: <input type="radio"/> MySite						Company: CalemEAM Inc.											
Contract type: SLA						Scope: System											
Status: Valid						Credit hold?: <input type="checkbox"/>											
Start date: Sun, 3/9/14						End date:											
Enforce PM: <input type="checkbox"/>						PM SLA:											
PM value:						PM UOM:											
Enforce CM: <input type="checkbox"/>						CM SLA:											
CM value:						CM UOM:											
SR priority: P5						Owner:											
Contact: Administrator																	
Ceiling (USD): 1,000.00						% Avail.: 0%											
Used (USD): 9,708.8411						Available (USD): 0.00											
Paid (USD): 6,229.0752						Outstanding (USD): 3,479.7659											

Contract Form – WO & SR SLA

Main SLA Asset WO Contact Document Business Lines Log Customize

Contract (1 of 17)

↻ ↑ ↓ ✕ 📄 Cost Status 🔧 Customize

Contract: CONTRACT-001

Note: Testing service site as vendor site e ✎

WO SLA (2)

+ - ↻ ✕ 🔍 🗨 🔧 Customize

<input type="checkbox"/>	Line	Priority	Category Set	From status	To status	SLA Due	SLA Warning	SLA unit	Note	Last modified
<input type="checkbox"/>	10	P1		Released	Completed	9	8.5	Hours	P1 Completion SLA	5/26/18 11:05
<input type="checkbox"/>	20	P1		Released	In-process	4	3.5	Hours	P1 On-Site SLA	5/14/18 4:32 P

SR SLA (2)

+ - ↻ 🔧 Customize

<input type="checkbox"/>	SR priority	SLA response	Resp unit	SLA Onsite	Onsite unit	SLA Resolution	Res unit	SLA Notes	Default?	Last modified
<input type="checkbox"/>	P1	2	Hours	1	Days	3	Days		<input type="checkbox"/>	10/3/16 4:32 P...
<input type="checkbox"/>	P2	4	Hours	3	Days	5	Days		<input checked="" type="checkbox"/>	10/3/16 4:32 P...

- Asset or Location by the contract

Main | SLA | **Asset** | WO | Contact | Document | Business Lines | Customize

Contract (3 of 15)

Cost Status Customize

Contract:

Note:

Contract (1)

Customize

<input type="checkbox"/>	Asset #	Location	Note	Status	Start date	End date
<input type="checkbox"/>	100HP-005	B02.HQ		Valid		

Contract Form – Work Order

- Work Orders by the contract

Main SLA Asset **WO** Contact Document Business Lines Customize

Contract (1 of 15)

Cost Status Customize

Contract:

Note:

Work Order (426)

Go to Source Customize

#	Wo #	Flag	Asset #	Location	Status	Subject	Sched start	Site
1	16491		forum_2	JJ.CA-002	Released	New subj 1	9/9/11 5:06 PM E...	JJ.CA
2	95082		forum_1	JJ.CA-002	Released	PM_Bi_Weekly	9/25/15 9:00 AM ...	JJ.CA
3	4475		Sensor-001	B02.HQ	Released	PM_Weekly	1/14/10 9:00 AM ...	MySite
4	80796		45678	B02.HQ	Released		7/14/13 9:00 PM ...	MySite
5	80789		45678	B02.HQ	Released		4/7/13 9:00 PM C...	MySite

- Contract Contacts

Main | SLA | Asset | WO | **Contact** | Document | Business Lines | Customize

Contract (1 of 15)

Cost Status Customize

Contract:

Note:

Contact (2)

Customize

<input type="checkbox"/>	#	Contact	Note	Last modified
<input type="checkbox"/>	1	Calem Test (no Lo...		1/14/13 6:01 PM C...
<input type="checkbox"/>	2	Jack Greener		3/23/09 8:20 PM C...

- Documents and Attachments

Main | SLA | Asset | WO | Contact | **Document** | Business Lines | Customize

Contract (1 of 15)

Cost Status Customize

Contract:

Note:

Document (1)

View file Customize

<input type="checkbox"/>	Seq	Document	Note
<input type="checkbox"/>	10		

Attachment (0)

View file Download All Customize

<input type="checkbox"/>	File	Note	Last modified
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- Business Lines by the contract

Main SLA Asset WO Contact Document **Business Lines** Customize

Contract (4 of 15)

Cost Status Customize

Contract:

Note:

Business lines (1)

Customize

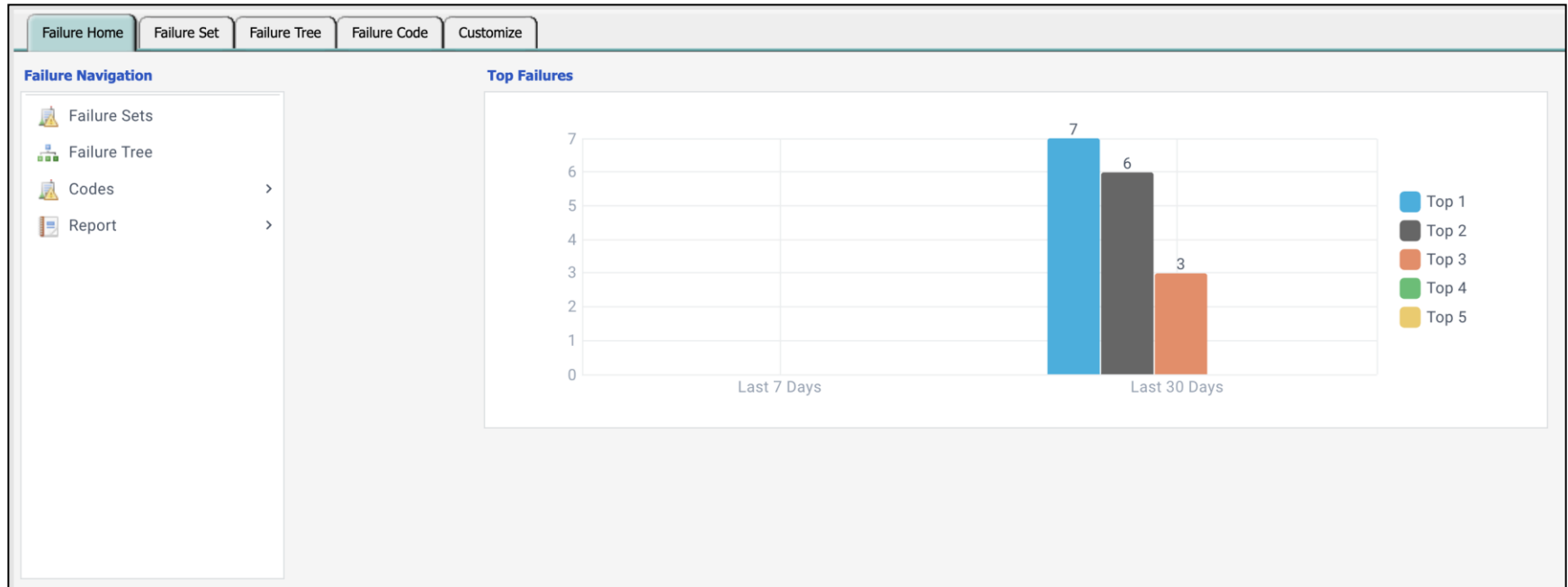
<input type="checkbox"/>	Business Line	Last modified
<input type="checkbox"/>	CloudService	4/16/16 4:24 PM Cen...

- SLA Time Window for Work Order SLA

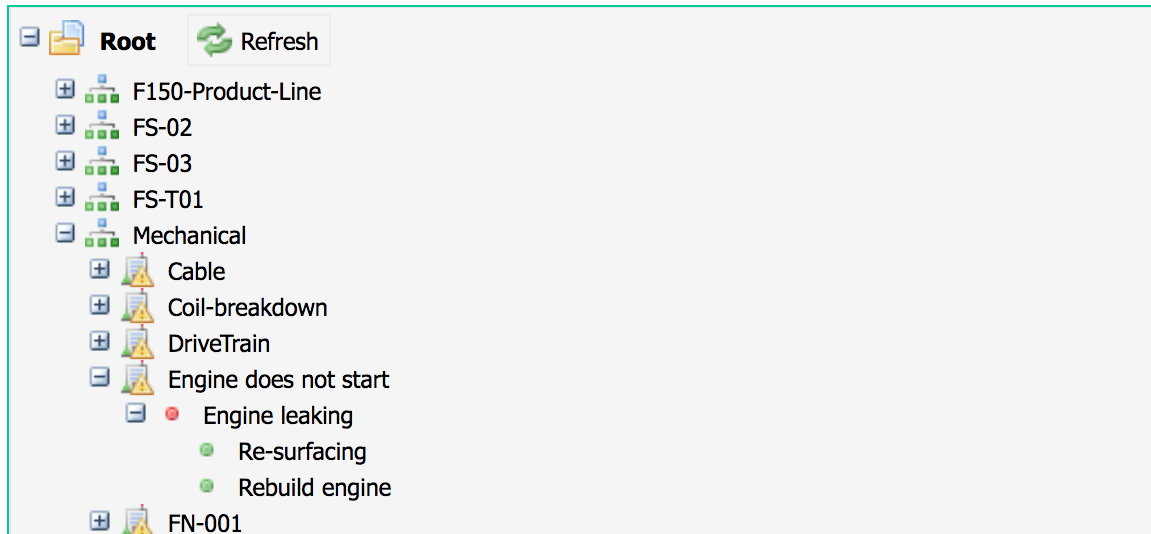
SLA Time (2)										
Customize										
<input type="checkbox"/>	#	SLA Time	24x7?	Start hour	End hour	Mon	Tue	Wed	Thur	Fri
<input type="checkbox"/>	1	24x7 Term	<input checked="" type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	2	Office Time	<input type="checkbox"/>	09	18	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Hands-on

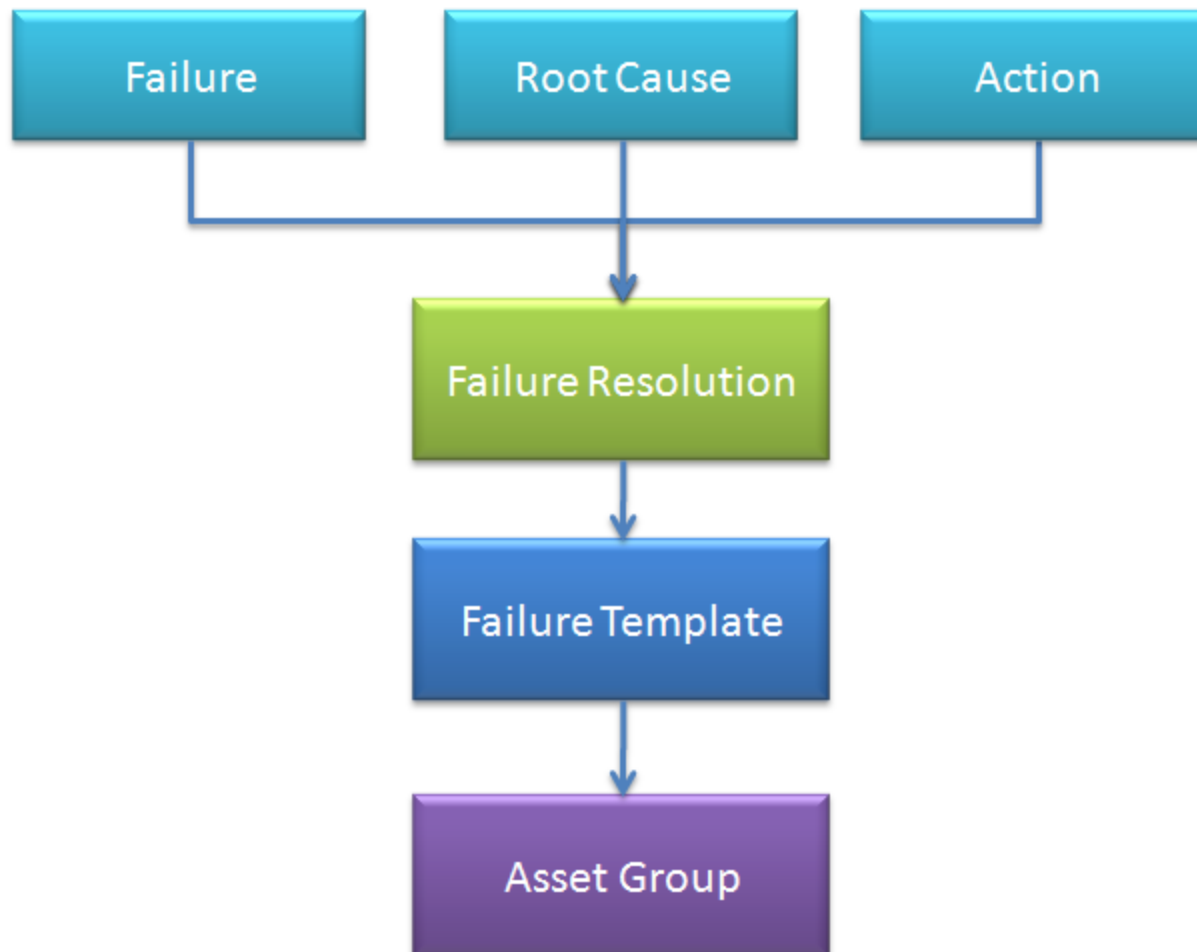
- **Creating a contract for a site with one of your EAM sites as vendor site**
- **Set default SLA for PM WO**
- **Set default SLA for CM WO**
- **Add SLA for work order for emergency category**
- **Add SLA for service request as default**



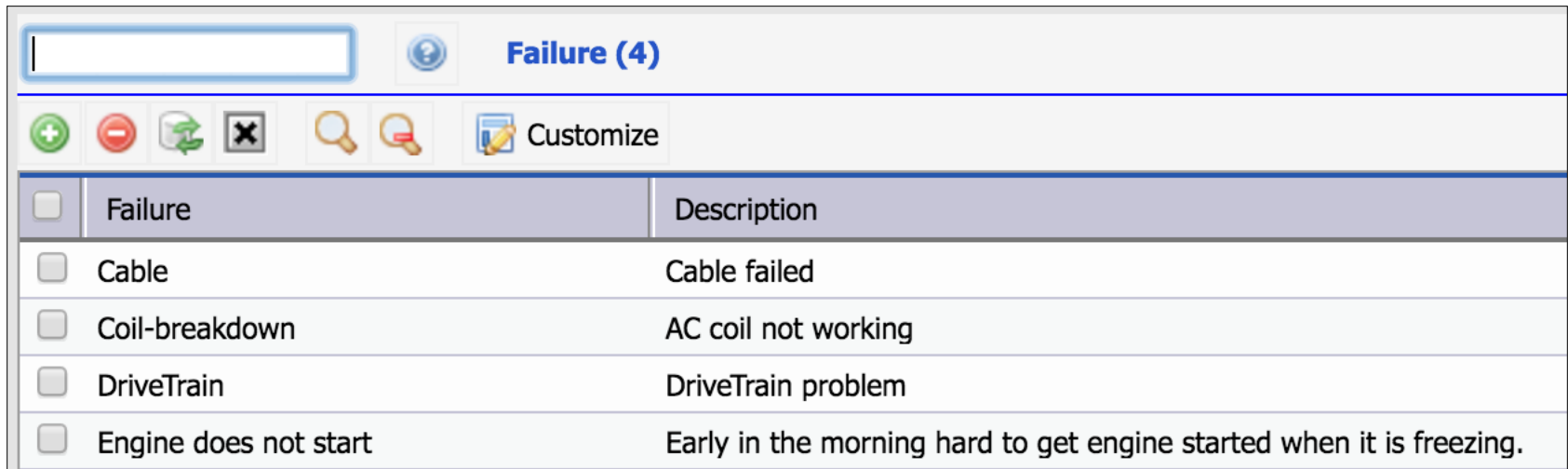
- Troubleshooting Tree by Failure | Cause | Action
- Failures Analysis Reports



- Use Case 1: Use Failure Code to create work orders
- Use Case 2: Use Resolution to complete work orders



- Define codes:
 - Failure, Root-Cause, Action



The screenshot displays a software interface for defining failure codes. At the top, there is a search bar and a title "Failure (4)". Below the search bar is a toolbar with icons for adding (+), deleting (-), refreshing (circular arrow), and closing (X), along with a magnifying glass icon and a "Customize" button. The main area is a table with two columns: "Failure" and "Description".

<input type="checkbox"/>	Failure	Description
<input type="checkbox"/>	Cable	Cable failed
<input type="checkbox"/>	Coil-breakdown	AC coil not working
<input type="checkbox"/>	DriveTrain	DriveTrain problem
<input type="checkbox"/>	Engine does not start	Early in the morning hard to get engine started when it is freezing.

- Define failure sets by Specialty, Asset Class, or Asset Items

The screenshot displays the 'Failure Set' configuration interface. At the top, there are tabs for 'Main', 'Assignment', and 'Customize'. Below the tabs, the 'Failure set (4 of 9)' section is active, showing a toolbar with icons for adding, deleting, and customizing. The 'Failure set:' field contains 'FS-T01', and there is a 'Note:' field below it. The 'Specialty (0)' section below it has a toolbar and a table with columns: #, Specialty, Failure in WO, Note, and Last modified. The table is empty, displaying 'No results found.' The 'Class (0)' section also has a toolbar and a table with columns: #, Class, Failure in WO, Full Path, and Last modified. This table is also empty, displaying 'No results found.'

Hands-on

- **Create Failure, Root-Cause, and Action**
- **Create Template**
- **Assign a failure template to an asset class and require that Failure code be filled out at work order completion**

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