

Part 2.5: Maintenance Functions – Change Management

Calem Enterprise Training

Summer 2024

Austin, Texas



Goals

I know the life-cycle of change management

I know how to set up class tree for changes

I know how to set up teams for change management

I know how to use My Change Lists

I know how to execute changes

I know how to view change calendar (TBD)

I know how to execute asset/location changes in work orders (TBD)

Asset and
Location

Maintenance
Schedules

Contract and SLA

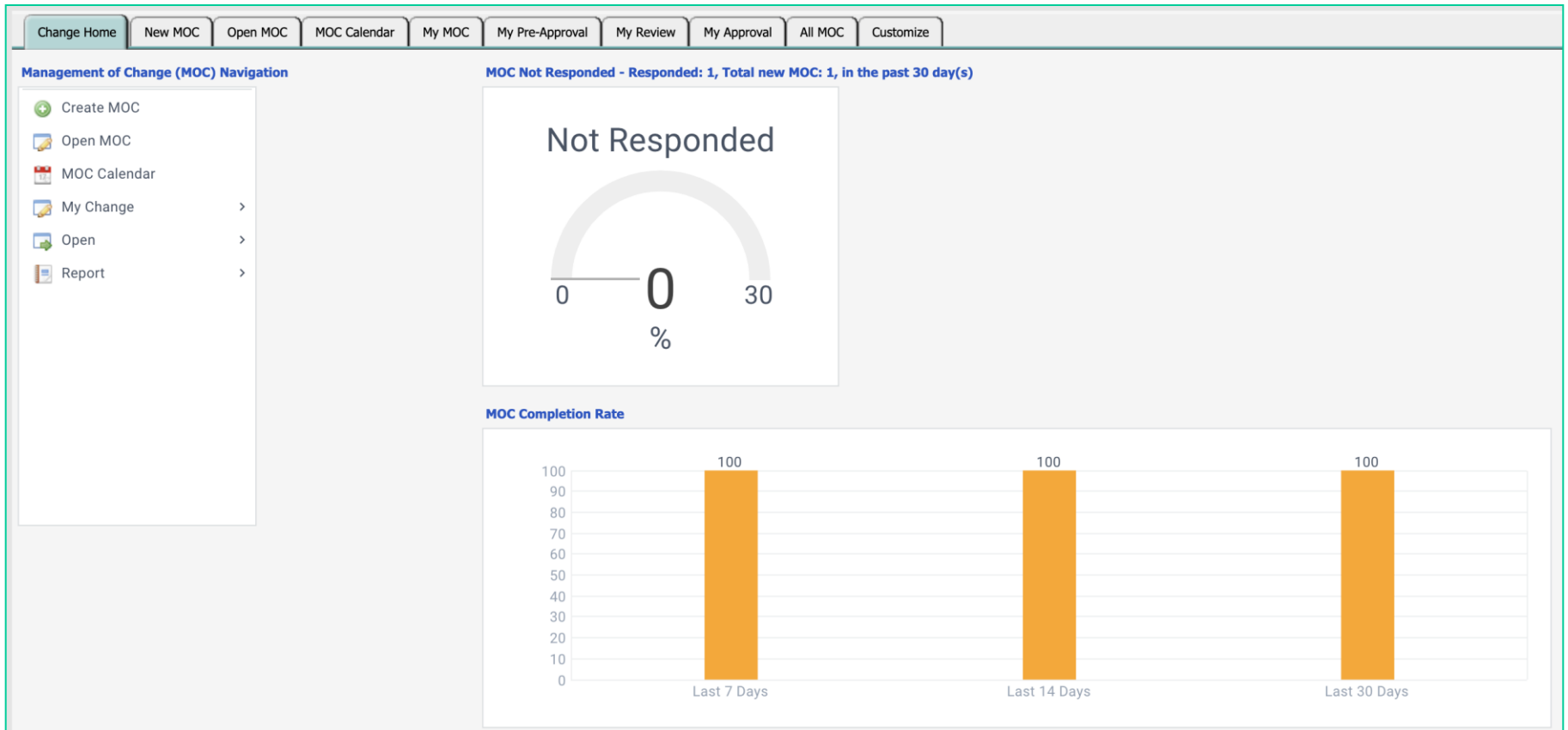
Work Order

Service Request

Change Management

Product – Change Management

- Include stake holders in changes
- Drive quality through change processes
- Organize changes by class hierarchy



Change Management – Why the Function?

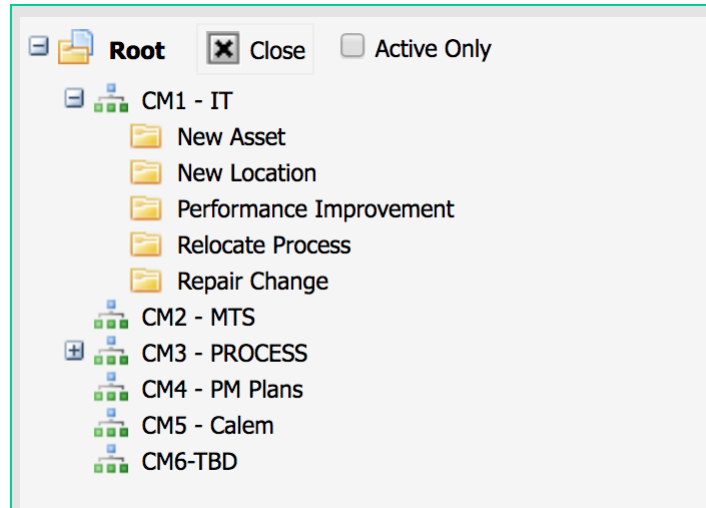
CalemEAM

Management of Change (MOC) is the module for change management.

- Use Changes to adapt and improve your maintenance operations
- Use Calem to standardize your change processes

Use class tree to organize changes

- Menu: Organization | Codes | Class List
- The class tree is shown when you lookup a class from change creation screen.

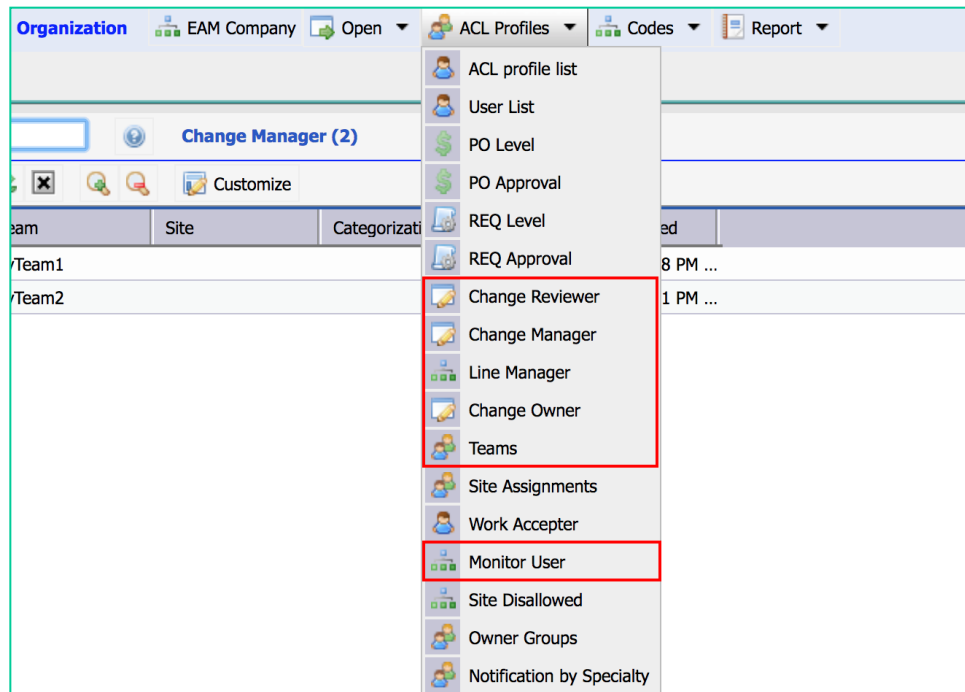
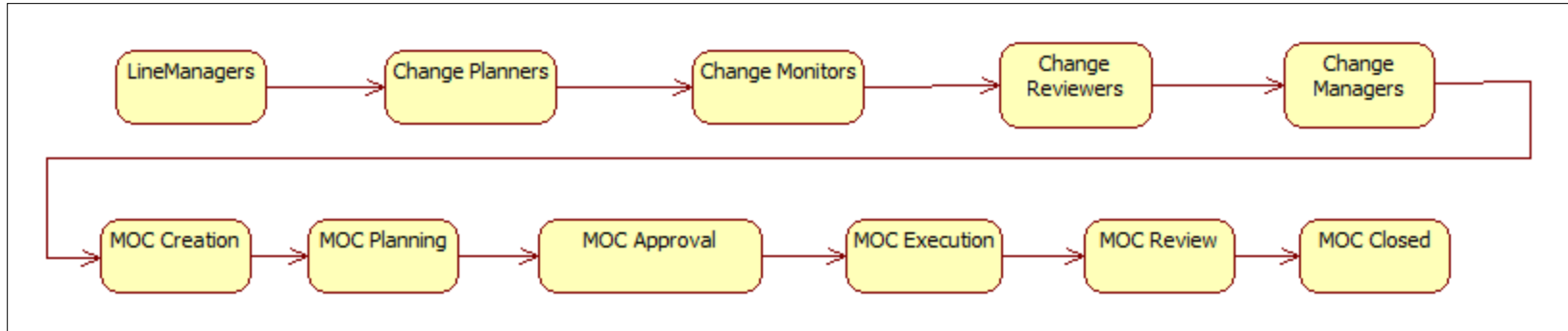


Change Management - Roles

Teams are used for some change roles so team members can fill in as needed.

Role	Calem Object	Function
Line Managers	Maintenance Manager Team	Pre-Approve MOC
Change Coordinators	Change Planners	Assign Reviewers, Change Managers
Change Review Board (CRB)	Reviewer Teams	Approve MOC by CRB
Change Managers	Change Manager Team	Approve MOC
Change Monitors	Change Monitors	Get MOC notifications
Change Owners	Owner Team	Execute MOC
Change Requestor	Users	Create MOC

- Set up roles at Organization Module | ACL Profiles



Roles can be configured by Site | Class

- Set Site to empty for all sites
- Set Class to Empty for all Classes
- You may have a team with empty class as default and other teams with classes

The following is one configuration for consideration

Role	By Site	By Class
Line Managers	Yes	No
Change Coordinators	Yes with default	N/A
Change Review Board	No	Yes with default
Change Managers	No	Yes with default
Change Monitors	Yes with default	N/A
Change Owners	Yes with default	Yes with default
Change Requestor	N/A	N/A

Calem populates a change with default roles.

- Based on class of a change
 - The class is used to find defaults.
 - If not found its immediate parent class is used to find the defaults.
- Based on the asset/location site of a change

Role	By Site	By Class
Line Managers	Yes	No
Change Review Board	No	Yes with default
Change Managers	No	Yes with default
Change Owners	Yes with default	Yes with default

Change Management – Creation

- Set a Class
- Set an Asset or Location
- Enter Change Description

Changes

Save Cancel Customize

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

Categorization:

Asset or Location (not both)

Asset Tag:

Location:

WO priority:

Description

Change desc.:

Desc (Not in Kind):

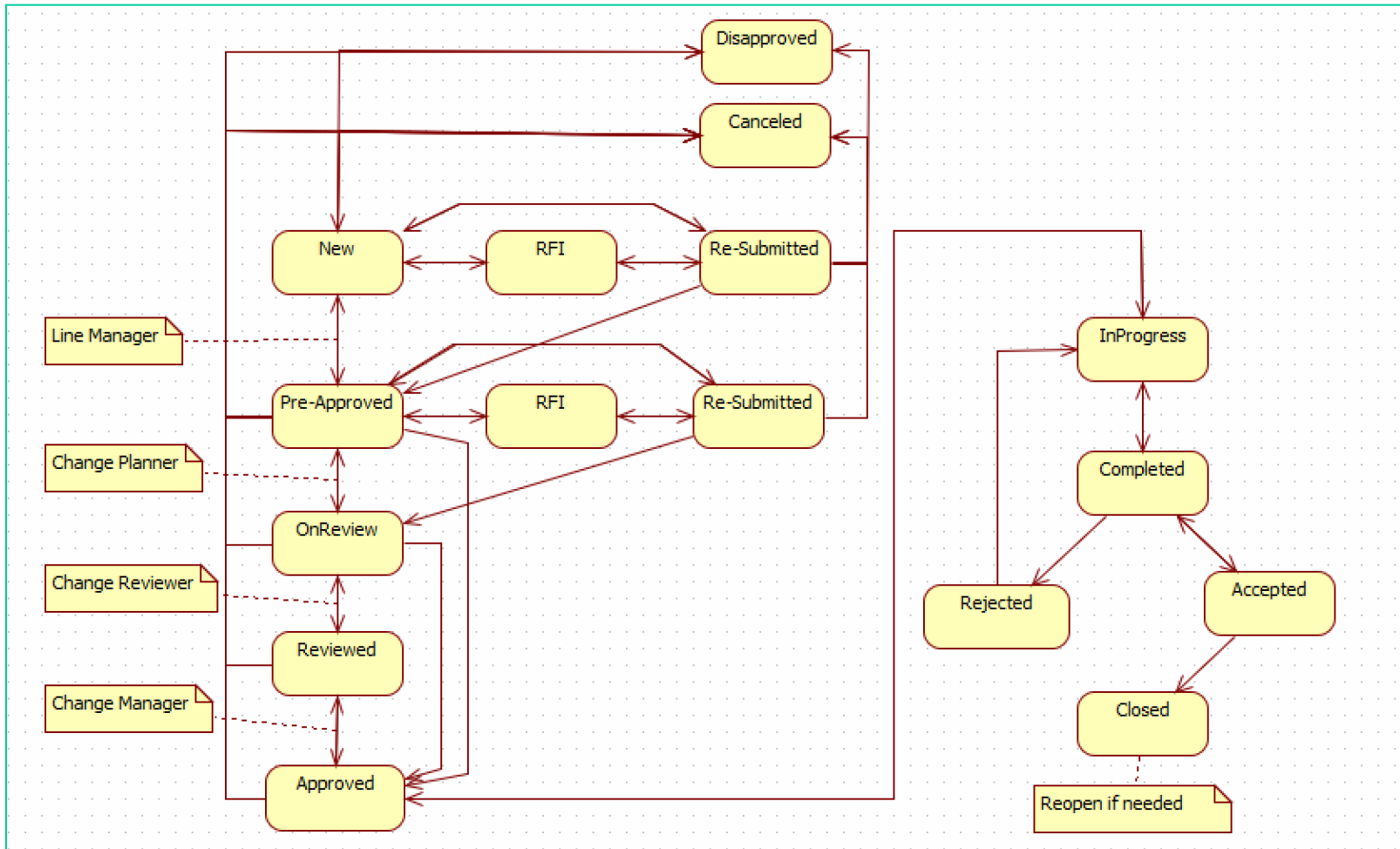
Other

Requester:

Time requested:

Need by:

Change Management – Life-Cycles



Event	Role
MOC Created	Line Manager Notified Pre-Approve MOC
Pre-Approved	Change Planner Notified Assign Reviewers Start Review Process
Reviewed	Change Manager Notified Approve MOC
Approved	Tech Staff Notified Execute MOC
Completed	Change Manager Notified Review/Close MOC

- Switch between TaskView & Data View Instantly

The screenshot shows the 'MOC Request (2 of 24)' interface. At the top, a navigation bar contains tabs for '1 Submission', '2 Planning', '3 Approval', '4 Execution', '5 Review', '6 Close', 'History', 'DataView', and 'Customize'. The 'DataView' tab is highlighted with a red border. Below the navigation bar, the interface displays fields for 'MOC #:' (28), 'Subject:' (My moc), 'Status:' (In Process), 'Service site:' (MySite), 'Actual start:', and 'Actual finish:'. A 'Step (0)' section is visible below these fields, containing a 'Customize' button. At the bottom, a table header is shown with columns: 'Seq', 'Action step', 'Assigned to', 'Need by', and 'Time completed'.

The screenshot shows the 'MOC Request (1 of 24)' interface. At the top, a navigation bar contains tabs for 'Main', 'Review', 'WO', 'Doc', 'Log', 'History', 'TaskView', and 'Customize'. The 'TaskView' tab is highlighted with a red border. Below the navigation bar, the interface displays fields for 'MOC #:' (29), 'Subject:' (My chg), 'Asset #:' (JJ.CA.AC-001), and 'Asset note:'. A detailed form follows with fields for 'Location:' (OH-CA-001), 'Status:' (New), 'Reviewed:' (None), 'Requester:' (Calem Eam), 'Owner:', 'Change Manager:' (Ben Manning), 'Has training doc?:' (checkbox), 'Actual start:', 'Site:' (JJ.CA), 'Service site:' (MySite), 'State:' (Open), 'Time requested:' (Tue, 3/22/16 10:31 AM Central), 'Need by:', 'WO priority:' (P3), and 'Actual finish:'.

- Set Impact, Execution and Rollback Plans

✓ 1 Submission ✓ 2 Planning ✓ 3 Approval ▶ 4 Execution ● 5 Review ● 6 Close ● History ● DataView

MOC Request (2 of 24)

📄 ⬆ ⬇ ✖ 🖨️ 📄 Status Log 📄 Customize 📁 More ▾

MOC #:

Subject:

Status: **Service site:**

Line Manager: **Owner:**

Change Manager: [Calem Eam](#) **Requester:**

Planning





Impact:

Execution plan:

Rollback plan:





- Set Reviewers, Steps, and Downtime
- Set Attachment and Docs

Review (2)

    Customize





<input type="checkbox"/>	#	Assigned to	Section	Status	Review by	Review time
<input type="checkbox"/>	1	Calem Eam	1-Env/Health/Safet...	Reviewed	Calem Eam	3/19/16 12:58 P...
<input type="checkbox"/>	2	Calem Test (no L...	1-Env/Health/Safet...	Reviewed	Calem Eam	3/19/16 1:06 PM...

Step (0)

    Customize

<input type="checkbox"/>	Seq	Action step	Assigned to	Need by	Time completed
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Planned downtime (0)

    Customize

<input type="checkbox"/>	Start time	Hours	Note	Last modified
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- An X-Day Review Window is available. It can be enabled.
- A review team may approve or reject the change in their review line.
- A review line is auto-approved X days after a change is transition to On-Review status.

- Complete Steps
- Create WO and Complete them if applicable
- Add Comments

Step (0)

  Customize

Seq	Action step	Assigned to	Need by	Time completed

Work Order (0)

   Customize

<input type="checkbox"/>	#	Wo #	Asset #	Location	Status	Assigned to	Actual start	Actual finish	Last modified

Change Management – Complete & Close

- Change Manager reviews completed MOC
- Accept and Close; OR Reject for rework

1 Submission 2 Planning 3 Approval 4 Execution 5 Review 6 Close History DataView Customize

MOC Request (2 of 24)

↑ ↓ × Print Status Log Customize More

MOC #: 28

Subject: My moc

Status: Completed **Service site:** MySite

Requester: Calem Eam **Time requested:** Sat, 3/19/16 11:22 AM Central

Owner: **Line Manager:**

Change Manager: Calem Eam **Need by:**

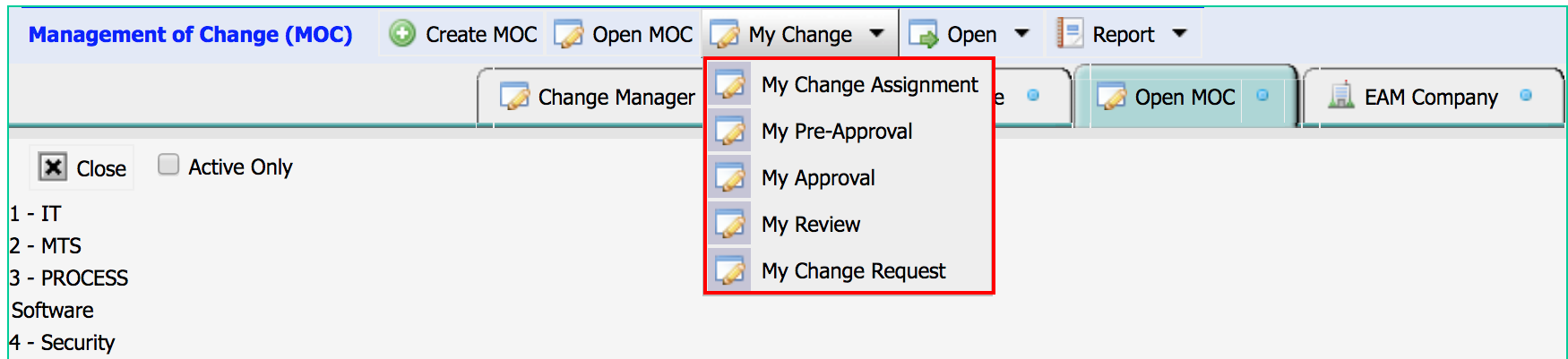
Actual start: **Actual finish:**

Comment (0)

+ - Refresh Customize

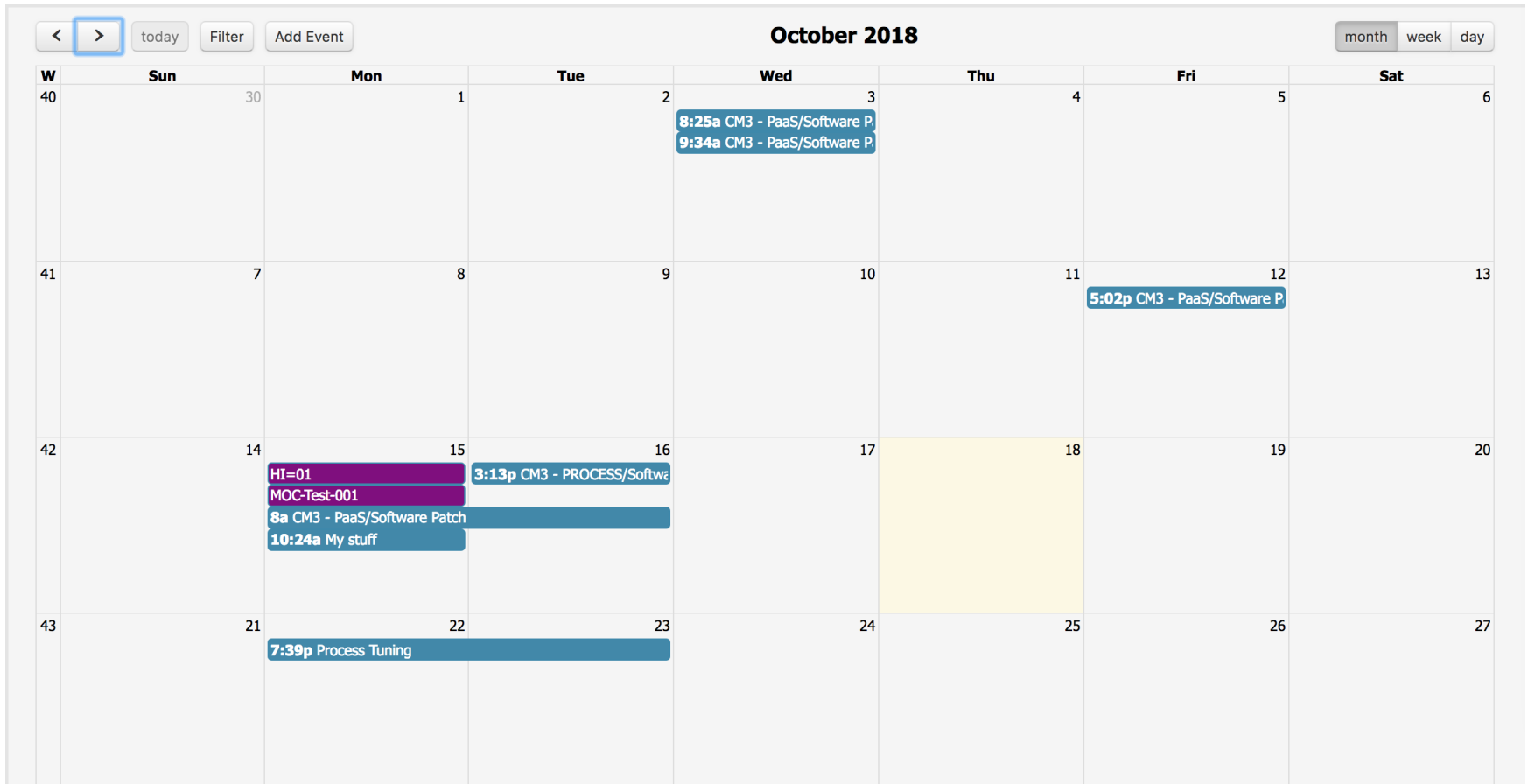
Modified by	Comment	To status	Last modified
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My change lists are provided for change roles



The MOC Calendar shows MOC work orders and events

- <http://www.calemeam.com/calemcustomers-2/how-to-use-the-calendar-view-for-change-management>



Track Asset/Location Changes from WO

Allow and track asset and location changes from work orders

- Work Order Execution Tab

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

Work Order (2 of 13874)

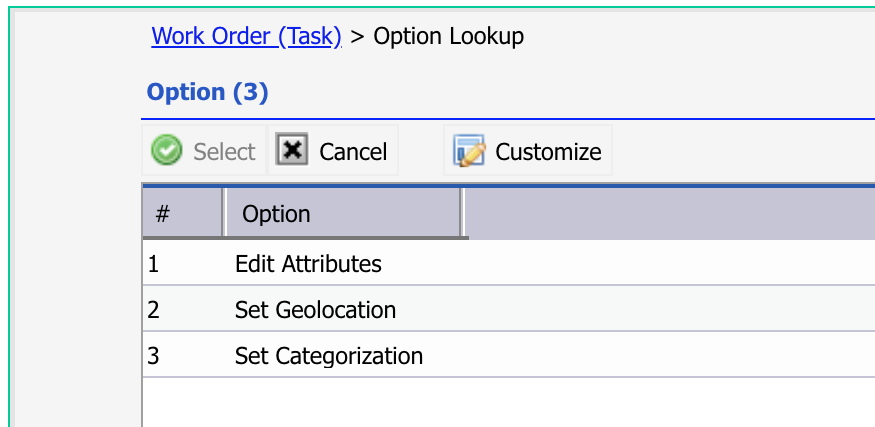
More Customize

Wo #:	154839	PM #:	M-2-Wed-864
Asset Tag:	100HP-008	Asset note:	JJ 100 HP Compressor of 2000
Model:	MOD-00213	Asset Categorization:	LinuxClone
Location:	CA.Building2	Site:	My_TX site
Priority:	P3	Service site:	MySite_CA
Status:	Released	Flag:	
Subject:	Test for 2nd Wed Plan	Actual finish:	<input type="text"/>
Completion		SLA Finish:	<input type="text"/>
Actual start:	<input type="text"/>	Action:	Replace-Coil
SLA Start:	<input type="text"/>	Result:	<input type="text"/>
Failure			
Failure:	Coil-breakdown		
Cause:	Rusty/Aging		
Downtime			

In-Progress Complete Troubleshooting Edit Location Edit Asset View inspection Map Email Status log Customize

Allow and track asset and location changes from work orders

- Edit Asset/Location Attributes
- Set Geolocation (latitude, longitude)
- Set Categorization



- Set up change class tree
- Set up default line managers
- Set up default reviewers
- Set up default change managers
- Set up default owner teams
- Create an MOC
- Move the MOC through its life-cycle to closed.

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