

Part 2.6: Maintenance Functions – Scheduling

Calem Enterprise Training

Summer 2024
Austin, Texas



What are the goals – Scheduling

CalemEAM

Goals

I know how to set up user schedules

I know how to manage schedule exceptions

I know how to use weekly schedule to assign work orders

I know how to use scheduling form to assign work orders

I know how to use scheduling dispatch board

Asset and
Location

Maintenance
Schedules

Contract and SLA

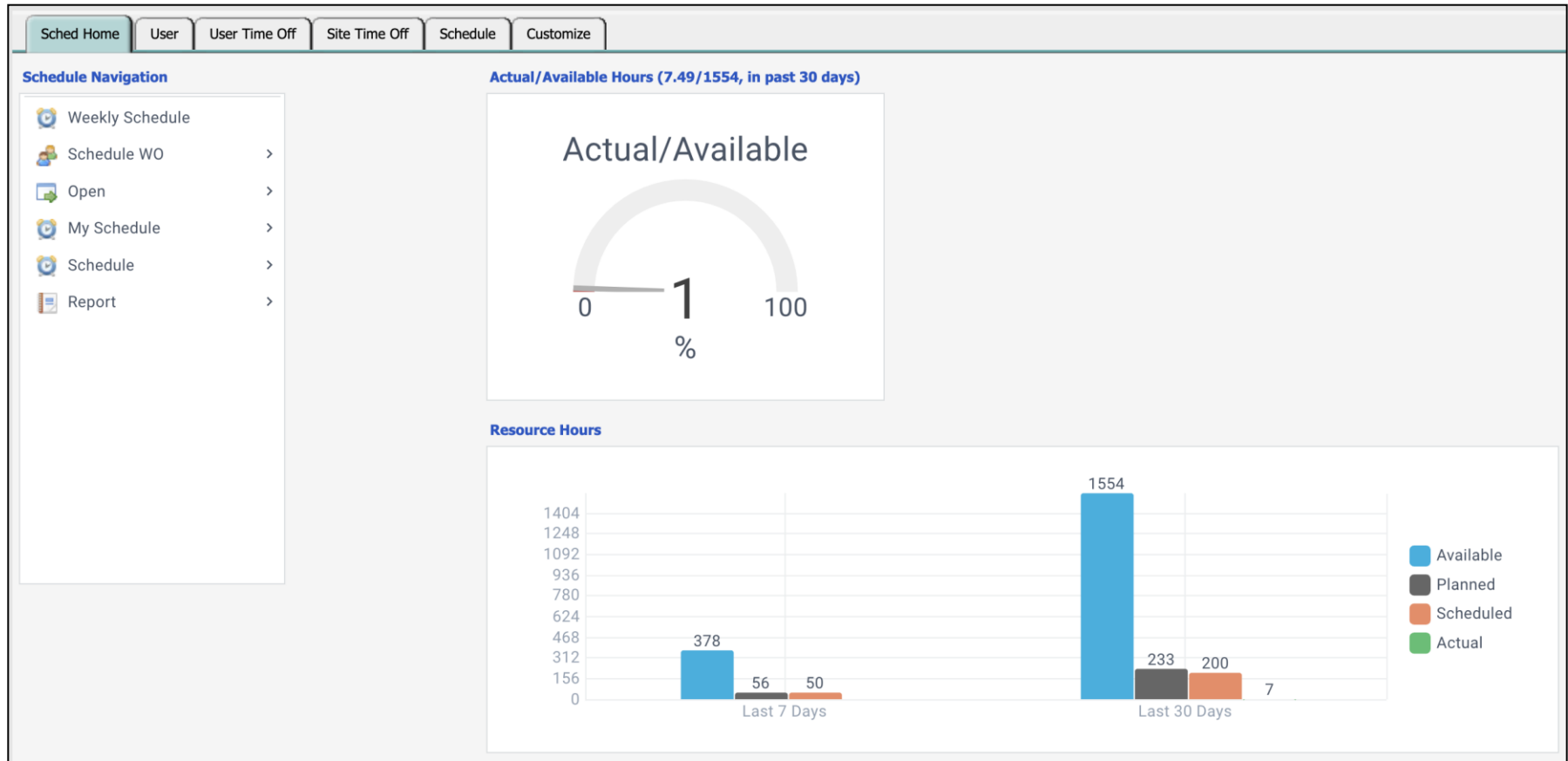
Work Order

Service Request

Change Management

Product – Scheduling

CalemEAM



Product – Scheduling

CalemEAM

- Weekly scheduling with drag and drop.

August 19 - August 25, 2013 **Weekly Schedule (6)**

← Previous → Next 📅 Set Week 🔄 Refresh ❌ Cancel 🛠 Customize

Full name	19 Monday	20 Tuesday	21 Wednesday	22 Thursday	23 Friday	24 Saturday	25 Sunday
Administrator		4524- PM_Weekly	8650- PM_Weekly 4524- PM_Weekly				37704- dfhd
Calem Eam			8712- PM_Weekly			5496- PM_Weekly	
John Freeman			55196- My sub				
John Huntsman				4398- PM_Weekly	8734-		
MPB						7415- PM_V	
Vendor Test001							

Drag to move

Drag to schedule

Right-click Edit

Drag to delete

Work Orders **Scheduling**

🔍 Search 🗑 Clear ⏸ Instant Off 📄 WO Scheduling (1474)

➕ New 📄 Open 📍 Goto WO ❌ Delete 🔄 Refresh ❌ Cancel 🖨 Print 🔍 Search 🗑 Clear 📄 Status log 🛠 Customize 📁 Tasks

#	Wo no.	Flag	Scheduling	Asset no.	Location	Status	Priority	Subject	Scheduled start	Time needed	Assigned to	Site
1	4499	📅	None	Test-PROD-010	HQ_001	Released	P4 Low	My W1 WO	11/10/09 6...			StyleBed...
2	4406	📅	None	200-001	HQ_BLD001	Released	P4 Low	PM_Weekly	5/4/09 0:0...		Calem Eam	MySite
3	4320	📅	None	200-001	HQ_BLD001	Released	P4 Low	PM_Weekly	9/10/07 0:...			MySite
4	5506	📅	None	PROD-NULL...	HQ_BLD001	Released	P4 Low	PM_Weekly	6/7/10 0:0...		Calem Eam	MySite
5	4330	📅	None	200-001	HQ_BLD001	Released	P4 Low	PM_Weekly	11/19/07 0...		Calem Eam	MySite
6	4380	📅	None	200-001	HQ_BLD001	Released	P4 Low	PM_Weekly	11/3/08 0:...		Calem Eam	MySite

WO Scheduling – Functions

CalemEAM

- Schedules
- Time-Off
- Work Order Weekly Scheduling
- WO Scheduling
- Dispatch Boards

Schedules – Schedule Cycles

CalemEAM

- Define Schedule Cycles: weekly or multi-week cycles
- E.g.: A work week with day-shift (no weekends)
- E.g: A two-week rotating shift cycle

Main Customize

Sched Cycle (1 of 3)

Customize

Cycle:

Note:

Last modified: Modified by: [Administrator](#)

Time created: Created by: [Administrator](#)

Sched Week (1)

Customize

	Mon	Mon Shift	Tue	Tue Shift	Wed	Wed Shift	Thu	Thu Shift	Fri	Fri Shift	Sat	Sat Shift	Sun	Sun Shift
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Day	<input checked="" type="checkbox"/>	Day	<input checked="" type="checkbox"/>	Day	<input checked="" type="checkbox"/>	Day	<input checked="" type="checkbox"/>	Day	<input checked="" type="checkbox"/>	(None)	<input checked="" type="checkbox"/>	(None)

Main Customize

Sched Cycle (1 of 1)

Customize

Cycle:

Note:

Last modified: Modified by: [Calem Eam](#)

Time created: Created by: [Calem Eam](#)

Sched Week (2)









Customize

	Mon	Mon Shift	Tue	Tue Shift	Wed	Wed Shift	Thu	Thu Shift	Fri	Fri Shift	Sat	Sat Shift	Sun	Sun Shift
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Day	<input checked="" type="checkbox"/>	Day	<input checked="" type="checkbox"/>	(None)	<input checked="" type="checkbox"/>	(None)	<input checked="" type="checkbox"/>	Night	<input checked="" type="checkbox"/>	Night	<input checked="" type="checkbox"/>	Night
<input type="checkbox"/>	<input checked="" type="checkbox"/>	(None)	<input checked="" type="checkbox"/>	(None)	<input checked="" type="checkbox"/>	Day	<input checked="" type="checkbox"/>	Day	<input checked="" type="checkbox"/>	(None)	<input checked="" type="checkbox"/>	(None)	<input checked="" type="checkbox"/>	(None)

Schedules – Schedule by Cycles

CalemEAM









- Schedules = Start/End dates + Schedule Cycles

<div><input type="text"/></div> <div> Schedules (3)</div>							
<div>       Customize</div>							
<input type="checkbox"/>	#	Schedule	Cycle	Start date	End date	Default?	Last modified
<input type="checkbox"/>	1	2-Week-Techs	2-Week A	12/30/13		<input type="checkbox"/>	7/3/14 3:14 PM ...
<input type="checkbox"/>	2	DEF-1-WK	1-Week-DEF	7/1/14		<input type="checkbox"/>	7/4/14 11:02 AM...
<input type="checkbox"/>	3	On-Call-Weekly	On-Call	1/1/15	1/15/15	<input type="checkbox"/>	1/2/15 10:34 AM...

Schedules – User Schedules

CalemEAM

- Assign schedule to User, Team, Site
- Calem generates user schedules

<div><input type="text"/></div> <div> Sched Resources (7)</div>							
<div>       Customize</div>							
<input type="checkbox"/>	#	Schedule	Full name	Team	Site	Last modified	
<input type="checkbox"/>	1	DEF-1-WK	John Fuller			1/2/15 10:38 AM C...	
<input type="checkbox"/>	2	On-Call-Weekly	John Fuller			1/2/15 10:38 AM C...	
<input type="checkbox"/>	3	2-Week-Techs	Ben Manning			7/24/14 8:16 AM C...	
<input type="checkbox"/>	4	DEF-1-WK	John Huntsman			7/4/14 11:02 AM C...	
<input type="checkbox"/>	5	2-Week-Techs	Calem Eam			7/1/14 7:33 PM Ce...	
<input type="checkbox"/>	6	2-Week-Techs	James Backer			7/1/14 7:18 PM Ce...	
<input type="checkbox"/>	7	2-Week-Techs	Jack Greener			6/27/14 10:17 AM...	

Schedules – Calendar of Availability

CalemEAM

- Availability = Scheduled – Time-Off – WO Scheduled

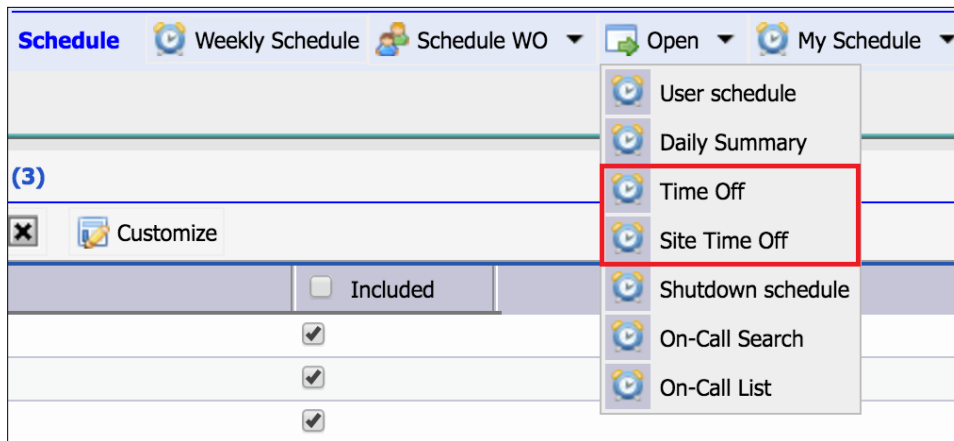
User schedule (2673)											
<input type="checkbox"/>	Full name	Date	Shift	Total hrs	Sched. hrs	Scheduled	Available	Site	On-Call?	Customer Site	Last modified
<input type="checkbox"/>	MPB	5/17/16	Day	0	0	1.5	0	MySite_CA	<input type="checkbox"/>		3/28/16 5:21 P...
<input type="checkbox"/>	Calem Eam	5/16/16	Day	0	0	27	0	MySite	<input type="checkbox"/>		3/28/16 5:21 P...
<input type="checkbox"/>	MPB	5/16/16	Day	0	0	1.5	0	MySite_CA	<input type="checkbox"/>		3/28/16 5:21 P...
<input type="checkbox"/>	MPB	5/13/16	Day	0	0	1.5	0	MySite_CA	<input type="checkbox"/>		3/28/16 5:21 P...
<input type="checkbox"/>	MPB	5/12/16	Day	0	0	1.5	0	MySite_CA	<input type="checkbox"/>		3/28/16 5:21 P...
<input type="checkbox"/>	John Fuller	5/11/16	Day	8	6		6	MySite	<input type="checkbox"/>		4/13/16 1:25 P...
<input type="checkbox"/>	John Huntsman	5/11/16	Day	8	6		6	MySite_CA	<input type="checkbox"/>		4/13/16 1:25 P...
<input type="checkbox"/>	Jack Greener	5/11/16	Day	8	6		6	MySite	<input type="checkbox"/>		4/13/16 1:25 P...

User schedule List > User Schedule List						
User Schedule - John Fuller						
May 2016						
S	M	T	W	T	F	S
1	2 6	3 6	4 6	5 6	6 6	7
8	9 6	10 6	11 6	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

Schedules – Holidays & Vacation

CalemEAM

- Add Site Holidays
- Add User Vacation
- Schedule User to Work Orders
- Availability = Scheduled – Time-Off – WO Scheduled






Schedules – Site Holidays/Shutdown


CalemEAM



- Define Site Holidays/Shutdown
- PM Blackout (No PM in a blackout period)
- Info only (not counting in scheduling)
- PM Calendar calculation
- Period include weekends (from start to end date)
- Custom Color in PM Calendar


[Site Time Off List](#) > Site Time Off Create


Site Time Off


 Save  Cancel  Customize

 Value is required: Start date

Start date:  

End date: 

Site: 

Note: 

PM blackout?: ☐

Info only?: ☐

No calendar?: ☐

Color (Hex):

By weekday?: ☐


Sat: ☐









Sun: ☐

Schedules – User Holiday/Vacation

CalemEAM

- Use “Time Block” to add multiple users for a period

 **Time Off (8)**








 Time Block Customize

<input type="checkbox"/>	Full name	Date	Total hrs	Note	Site
<input type="checkbox"/>	John Freeman	10/5/15	8	Vacation Week	MySite

Schedules – Shutdown Schedules

CalemEAM

- For maintenance planning use only
- Not integrated into scheduling availability

Shutdown schedule (2)						
<div>       Customize</div>						
<input type="checkbox"/>	#	Site	Start time	End time	Subject	Last modified
<input checked="" type="checkbox"/>	1	MySite_CA	7/7/10 8:00 PM Central	7/8/10 2:00 AM Central		7/8/10 8:48 AM Central
<input type="checkbox"/>	2	MySite	1/14/10 7:23 PM Central	1/15/10 1:23 AM Central	Shutdown testing	




Schedules – WO Weekly Scheduling

CalemEAM

Option to narrow down user set to schedule


- By Sites
- By Job Roles




Dispatch site (3)

 Continue   Customize

Site	<input type="checkbox"/> Included
MySite	<input checked="" type="checkbox"/>
MySite_CA	<input checked="" type="checkbox"/>
StyleBeds.CA	<input checked="" type="checkbox"/>

[Dispatch site List](#) > Job role List



 Continue   Customize

Job role	<input type="checkbox"/> Included
002	<input checked="" type="checkbox"/>
004	<input checked="" type="checkbox"/>
005	<input checked="" type="checkbox"/>
006	<input checked="" type="checkbox"/>
007	<input checked="" type="checkbox"/>

Schedules – WO Weekly Scheduling

CalemEAM

- Drag and Drop a WO to schedule/un-schedule
- Change weeks
- Scheduling Tab for WO details

March 7 - March 13, 2016
Weekly Schedule - 10/60 (To-Sched/Avail), 10/60 (Planned/Capacity)

Previous
Next
Set Week
WO Planned
Work Assign.
Customize

Full name	7 Monday	8 Tuesday	9 Wednesday	10 Thursday	11 Friday	12 Saturday	13 Sunday	Team
Administrator	0	0	0 104438- Test for 2	0	0	0	0	MyCA_Team1
Calem Test (no Log...	0	0	0	0	0	0	0	Network.Team
Dan	0	0	0	0	0	0	0	
Jack Greener	0	6	0	0	6	0	0	Network.Team
John Freeman	0	0	0	0	0	0	0	Network.Team
	0 102011- Monthly i	6	6	6	6	0	0	

Work Orders
Scheduling

WO Scheduling (5787)

Goto WO
Status log
Customize
More

#	Wo #	Flag	Scheduling	Asset #	Location	Status	Priority	Subject	Sched start	Need by	Assigned to	Site
1	69572		None	0911-2345	B02.HQ	In-process	P1	Meter-based PM job for 09...	3/1/14 2:17 PM Ce...		MPB	MySite
2	105752		Fully	Test-PROD-00...	B02.HQ	New	P1	My testing	3/23/16 8:21 AM C...		Calem Eam	MySite
3	4471		Fully	JJ.CA.AC-001	OH-CA-001	In-process	P1	PM_Weekly -002	9/2/10 10:00 AM E...	11/2/08 1:0...	John Freeman..	JJ.CA
4	4279		Partially	SP02-M-PORT	CA.Building2	Released	P1	PM_Weekly	7/25/10 10:00 AM ...	3/1/09 1:00 ...	MPB	My TX sit..

Schedules – WO Scheduling

CalemEAM

WO Scheduling by List

- Scheduling Tab for WO Scheduling

Work Orders		Scheduling											
		WO Scheduling (6160)											
		Goto WO More											
	#	Wo #	Flag	Scheduling	Asset #	Location	Status	Priority	Subject	Sched start	Need by	Assigned to	Site
<input type="checkbox"/>	1	69572		None	0911-2345	B02.HQ	In-process	P1	Meter-based PM job for 09...	3/1/14 2:17 PM Ce...		MPB	MySite
<input type="checkbox"/>	2	105752		Fully	Test-PROD-00...	B02.HQ	New	P1	My testing	3/23/16 8:21 AM C...		Calem Eam	MySite
<input type="checkbox"/>	3	4471		Fully	JJ.CA.AC-001	OH-CA-001	In-process	P1	PM_Weekly -002	9/2/10 10:00 AM E...	11/2/08 1:0...	John Freeman..	JJ.CA
<input type="checkbox"/>	4	4279		Partially	SP02-M-PORT	CA.Building2	Released	P1	PM_Weekly	7/25/10 10:00 AM ...	3/1/09 1:00 ...	MPB	My TX sit..
<input type="checkbox"/>	5	3776		Fully		B02.HQ	Released	P1	Failure subject	10/15/09 9:00 AM ...	6/1/09 12:0...		MySite
<input type="checkbox"/>	6	16691		None	100HP-004	B02.HQ	Released	P1	100HP-004 Quarterly PM	8/3/09 12:00 AM C...	8/3/09 4:00 ...		MySite
<input type="checkbox"/>	7	4282		Fully		Bld1.Flr1	In-process	P1	PM_Weekly	2/17/10 9:00 AM C...	9/6/09 12:0...	John Freeman..	ARNG
<input type="checkbox"/>	8	4266		Fully		JJ.CA-002	Released	P1		7/25/10 10:00 AM ...	11/1/09 1:0...	MPB	JJ.CA
<input type="checkbox"/>	9	4283		Fully	AR2	CA.Building2	Released	P1	PM_Weekly	7/25/10 10:00 AM ...	11/1/09 1:0...	MPB	My TX sit..

Schedules – WO Scheduling

CalemEAM

WO Scheduling by List

- Scheduling Tab for WO Scheduling

Work Orders

Scheduling

Planned labor (0)

+

-

Customize

<input type="checkbox"/> Job role	Hours	Scheduled	Actual
No results found.			

Scheduled labor (0)

+

-

Customize

Daily Summary (14482)

Calendar

+

-

Customize

Date	Job role	Scheduled	Available	Site
9/18/22	Network.Tech	3	0	MySite
9/9/22	008		6	GA
9/9/22	Tech.CAD		6	3M.CA
9/9/22	011	0	12	MySite
9/9/22	IT.Applications	0	18	LA
9/9/22	ELEC-L2		6	LA
9/8/22	008		6	GA
9/8/22	ELEC-L2		6	Acme Corp.

User Schedule (13511)

+

-

Calendar

+

-

Customize

<input type="checkbox"/> User	Date	Job role	Scheduled	Availa
<input type="checkbox"/> Jack Greener	9/18/22	Network.Tech	3	0
<input type="checkbox"/> Calem Eam	9/9/22	ELEC-L2		0
<input type="checkbox"/> Matt Guy	9/9/22	IT.Applications		6
<input type="checkbox"/> Vendor Test001	9/9/22	Tech.CAD		6
<input type="checkbox"/> Test-EMP	9/9/22	008		6
<input type="checkbox"/> Dan	9/9/22	011		6
<input type="checkbox"/> Jack Greener	9/9/22	Network.Tech		0
<input type="checkbox"/> Ben Manning	9/9/22	008		0

Schedules – Dispatch Board

CalemEAM

- Dispatch to User, TeamLeader, Team
- Use Location Tree to narrow down work orders

The screenshot displays the CalemEAM Dispatch Board interface. On the left, a list of work orders is shown, including details like 'Released/13 - Clean up office', 'B07.MyCA_Site1', 'A0000857 -', 'Approved/My note', 'CA.Building2', 'TAG-001(中文) -Office area', 'New/yy', 'B07.MyCA_Site1', 'MyCA_Asset001 -', 'New/aq2', 'OFFICE.IT', 'A002400 -My testing', 'New/t100', 'B02.HQ', and '0911-2345 -'. A context menu is open over the first work order, showing options: 'Display 10 more', 'Display all', and 'Display reset'. The main area is a grid with columns for different users: 'Unassigned 1297 - 1002 - 0', 'Calem Eam 0 - 0 - 0', 'Calem Test (no Login) 0 - 0 - 0', 'Jack Greener 0 - 0 - 6', and 'John Freeman 0 - 0 - 0'. At the bottom left, a 'Location Tree' is visible, showing a hierarchy: 'Root' (JJ.CA, My TX site, MySite, StyleBeds.CA, StyleBeds.HQ). The tree is highlighted with a red border. The bottom of the interface includes a toolbar with 'Refresh', 'Show Inactive', and 'Hide Inactive' buttons.

Scheduling – Hands-On Lab

CalemEAM

- Create a Schedule Cycle of Mon-Fri work week
- Create a Schedule using the Cycle
- Add a User with “EAM Crew” checked and status “Active”
 - Those users will be used by Calem for Schedule Generation
- Assign the schedule to the User
- Enter a time off for a site
- Enter a time off for the user
- Use Weekly Scheduling Form
 - Drag a Wo to a weekly calendar for assignment
- View WO Assignment report

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

