

Part 4.0: System Functions – Multi-Site/ACL Profile

Calem Enterprise Training

Summer 2024

Austin, Texas



Goals

I know how to set up EAM Sites

I know how to set up Vendor | Manufacturer Sites

I know how to set up Customer Sites

I know how to set up ACL Profiles

I know how to assign site access to ACL Profiles

I know how to set up Read-Only Profiles

I know how to set up monitor roles

I know how to set up email notification filtering

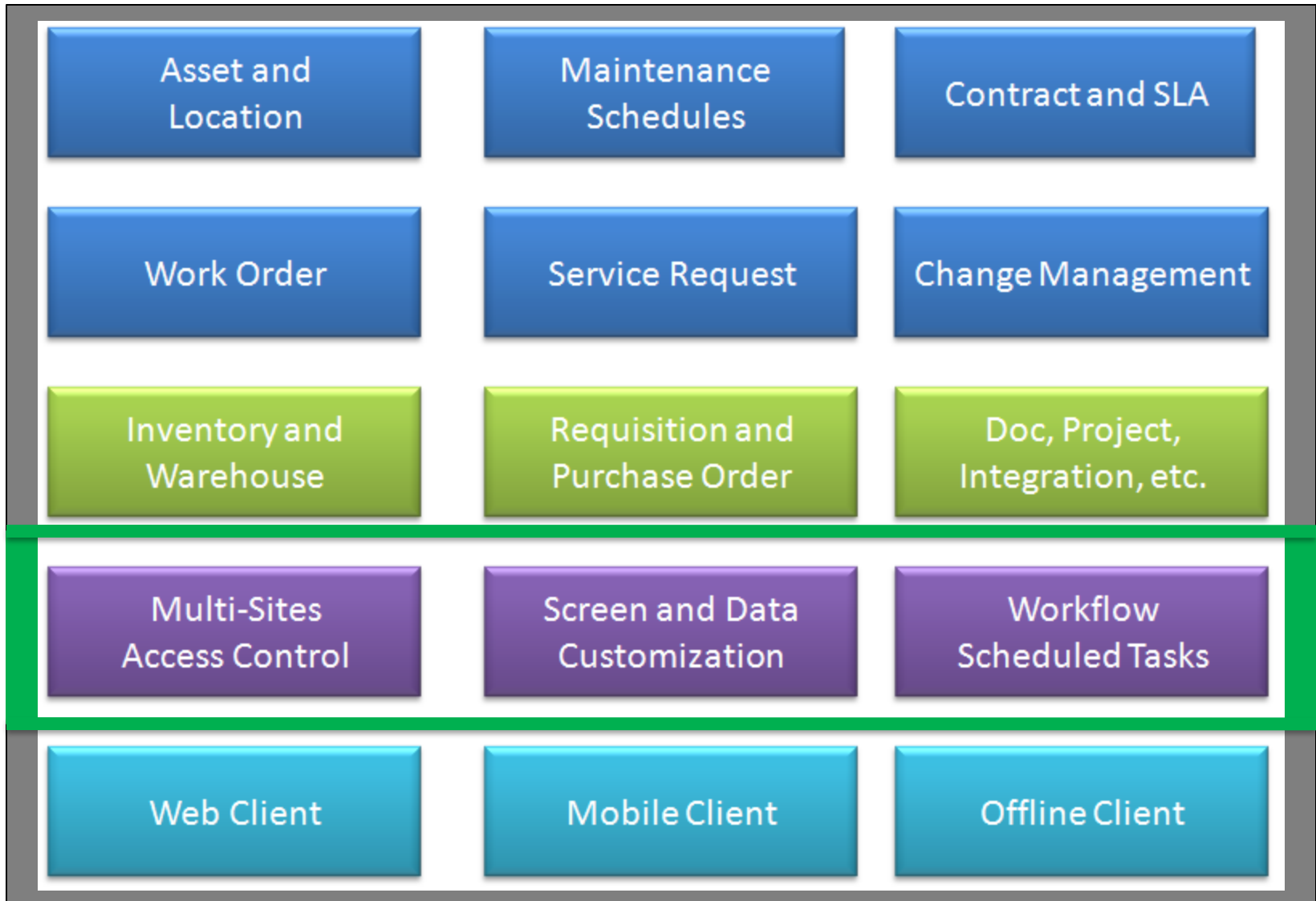
Multi-Site
Access Control

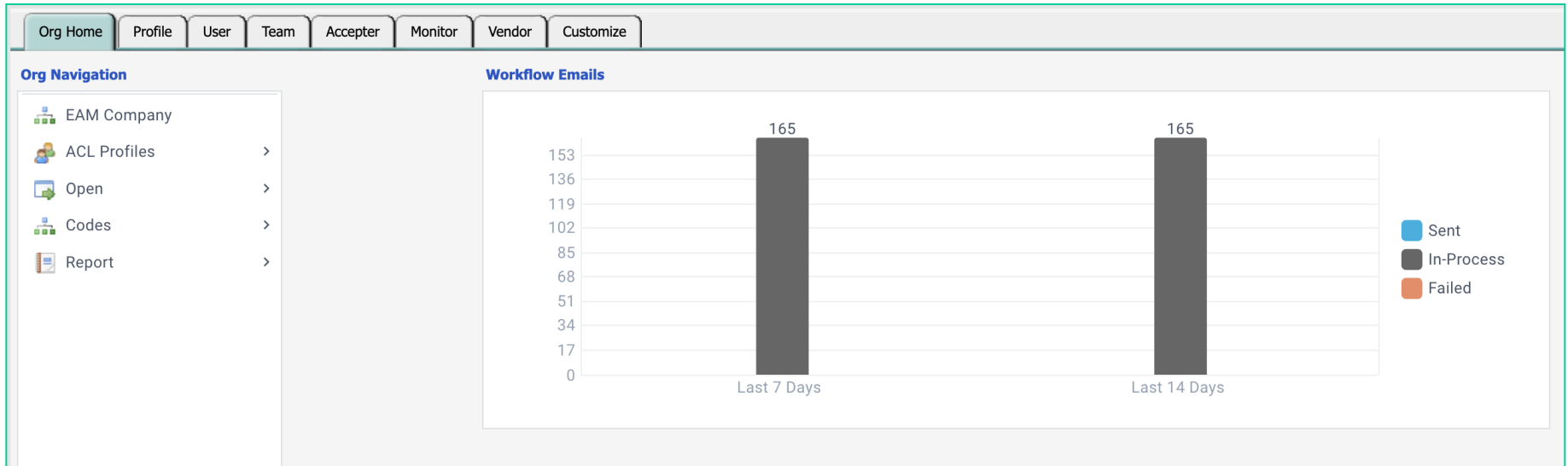
Screen & Data
Customization

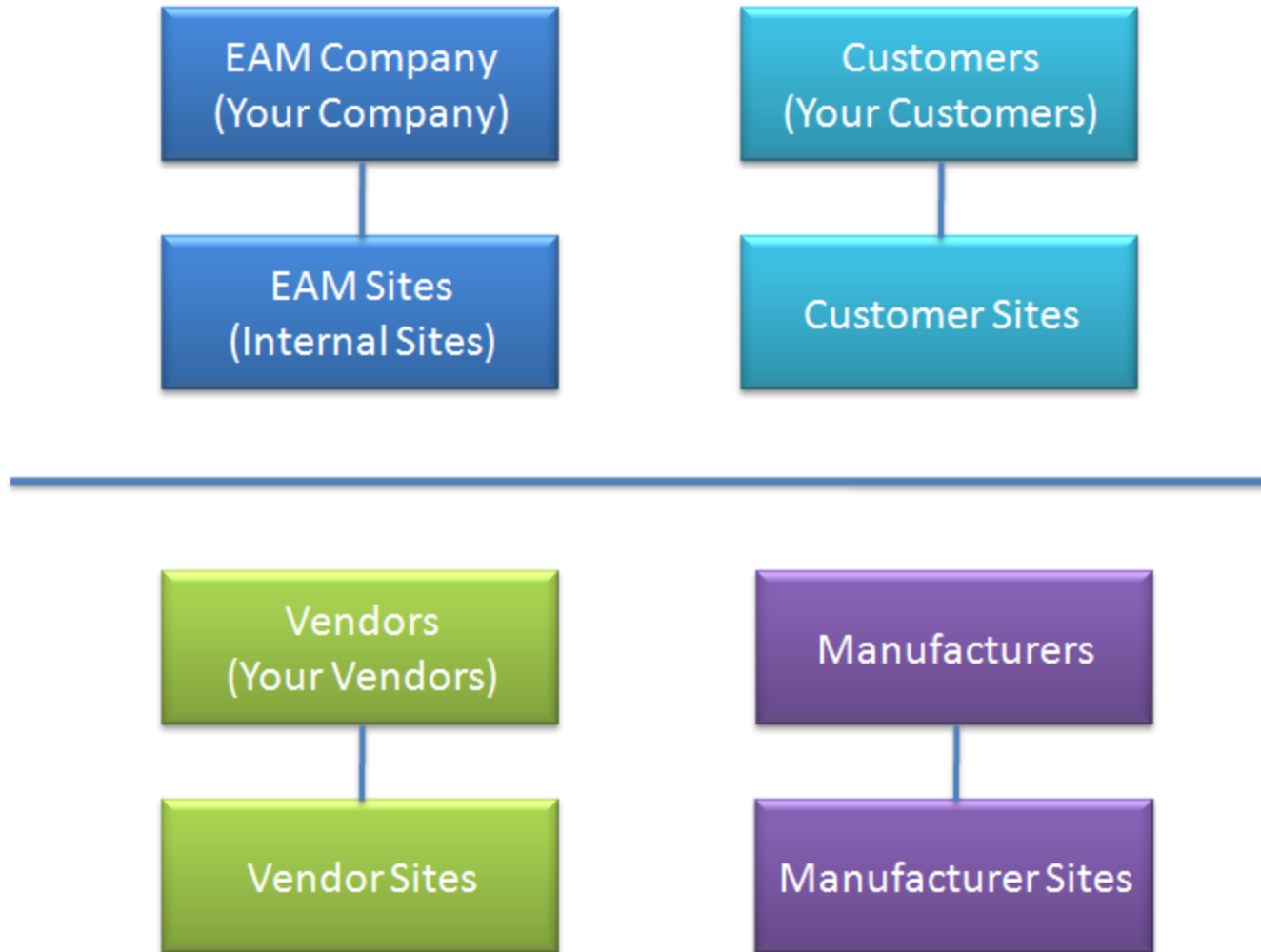
Workflow
ScheduledTasks

Product Overview – Functions

CalemEAM








	Asset Sites	Service Sites	Inventory Sites	PO Sites
Your Sites	X	X	X	X
Customer Sites	X		X	
Vendor Sites		X		
Manufacturer Sites				

- **Your Sites:** internal sites of your company
- **Customer Sites** – you maintain the assets for your customers
- **Vendor Sites** – your parts and service providers
- **Manufacturer Sites** – the manufacturers for your assets and inventory

- Your Company and Configuration

Main	Site	Employee	Job Role	Opt-Out	Address	Doc	Customize
EAM Company (1 of 1)							
							
Company:	<input type="text" value="CalemEAM Inc."/>						
Alias:	<input type="text"/>						
Note:	<input type="text" value="My company"/>						
Contact:	Calem Eam						
Comment:	<input type="text"/>						
PO term:	<input type="text"/>						
Address:	<input type="text" value="10012 San Jacinto Blvd, Austin, TX 78701"/>						

Multi-Sites – Company Defaults

- Boilerplate Steps for CM/PM Work Orders
- Default SLA Contract
- Default TimeZone, Locale
- Tech Photo in Assignment Notification

WO Default Steps

CM Plan?:

PM Plan?:

SLA contract?:

Time Zone:

No tech photo:

CM Plan:

PM Plan: [BOILER-001](#)

SLA contract:

Locale:

EAM Company – Sites

- A site is a regional office, a facility, or a clinic
- Manage as many sites as needed

Main Site Employee Job Role Opt-Out Address Doc Customize

EAM Company (1 of 1)

Company: Alias:

EAM Site (8)

<input type="checkbox"/>	#	Site	Note	Service site	PO site	Inventory site	Last modified
<input type="checkbox"/>	1	FARADAY	My company	FARADAY	FARADAY	FARADAY	2/17/16 4:47 PM C...
<input type="checkbox"/>	2	KRT-New	My company	KRT-New	KRT-New	KRT-New	2/15/16 4:49 PM C...
<input type="checkbox"/>	3	My-Site-001	My company	My-Site-001	My-Site-001	My-Site-001	4/13/16 1:25 PM C...
<input type="checkbox"/>	4	MySite		MySite	MySite	MySite	4/13/16 1:24 PM C...
<input type="checkbox"/>	5	MySite_CA	EAM company CA site.	MySite_CA	MySite_CA	MySite_CA	6/2/15 3:04 PM Ce...
<input type="checkbox"/>	6	s-001	My company	s-001	s-001	MySite	2/15/16 4:49 PM C...
<input type="checkbox"/>	7	SiteA	My company	SiteA	SiteA	SiteA	2/15/16 4:49 PM C...
<input type="checkbox"/>	8	TX_MySite	My company	TX_MySite	TX_MySite	TX_MySite	2/22/16 3:29 PM C...

EAM Company – Employees

- Users of your organization
- Reserved: “**admin**”/system use; “**calem_api**”/API use

The screenshot shows the 'Employee' management interface for 'EAM Company (1 of 1)'. It includes a navigation bar with tabs for Main, Site, Employee, Job Role, Opt-Out, Address, Doc, and Customize. Below the navigation, there are controls for the company name (CalemEAM Inc.) and an alias field. A search bar and 'Employee (28)' label are also present. The main area contains a table of employees with various columns and a 'Job roles' button.

<input type="checkbox"/>	#	Full name	User name	Job role	Is EAM crew?	Note	Status	Team	Site	Last modified
<input type="checkbox"/>	1	Administrator	admin	ELEC-L2	<input checked="" type="checkbox"/>		Active	MyCA_Team1	MySite	4/20/16 10:33 ..
<input type="checkbox"/>	2	Anonymous	anonymous		<input type="checkbox"/>				MySite	4/18/16 6:16 A..
<input type="checkbox"/>	3	API	calem_api		<input type="checkbox"/>				MySite	7/19/14 8:58 A..
<input type="checkbox"/>	4	Calem Eam	calem	ELEC-L2	<input checked="" type="checkbox"/>			MyTeam2	MySite	4/20/16 11:37 ..
<input type="checkbox"/>	5	Calem Test (no Log... u011	u011	002	<input checked="" type="checkbox"/>		Active	Network.Team	MySite	4/4/15 10:12 P..
<input type="checkbox"/>	6	Calem Test-A	u013	004	<input type="checkbox"/>		Active	My_Team2	MySite	1/11/16 3:32 P..
<input type="checkbox"/>	7	Calem Test2 (no Lo... u012	u012	006	<input type="checkbox"/>		Inactive	MyCA_Team1	MySite	1/11/16 3:32 P..
<input type="checkbox"/>	8	Clay Li	cli	ELEC-L2	<input checked="" type="checkbox"/>	LDAP user	Active		s-001	9/4/13 4:54 P...
<input type="checkbox"/>	9	Dan	u542	011	<input checked="" type="checkbox"/>		Active		MySite	1/11/16 2:24 P..
<input type="checkbox"/>	10	IT BENCHSTOCK		ELEC-L2	<input checked="" type="checkbox"/>				MySite	9/4/13 4:55 P...
<input type="checkbox"/>	11	Jack Greener	jgreen	Network.Tech	<input checked="" type="checkbox"/>	LDAP user 1	Active	Network.Team	MySite	2/29/16 3:14 P..
<input type="checkbox"/>	12	Jason Bennett	u828	Millwork	<input type="checkbox"/>			MyCA_Team1	MySite	1/11/16 3:32 P..
<input type="checkbox"/>	13	John Freeman	jfreeman	IT.Security	<input checked="" type="checkbox"/>		Active	Network.Team	MySite	11/11/15 9:40 ..

- Job Role (Craft code)

EAM Company (1 of 1)

Company:

Alias:

<input type="checkbox"/>	#	Job role	Rate (USD)	Note	Last modified
<input type="checkbox"/>	15	Millwork	20.00		7/11/15 6:52 PM Ce..
<input type="checkbox"/>	16	My Job	85.00		4/29/10 7:56 AM Ce..
<input type="checkbox"/>	17	Network.Tech	40.00	Network technician	4/29/10 7:35 AM Ce..
<input type="checkbox"/>	18	Tech.CAD	80.50		4/30/10 1:21 PM Ce..
<input type="checkbox"/>	19	Tech.Computer	92.00		4/29/10 8:58 AM Ce..
<input type="checkbox"/>	20	TECH.NET	30.00		4/29/10 7:57 AM Ce..
<input type="checkbox"/>	21	Test_001	23.00		4/29/10 8:39 AM Ce..

<input type="checkbox"/>	Site	Job role	Rate (USD)	Last modified
<input type="checkbox"/>	MySite	ELEC-L2	30.00	4/12/15 9:44 P...

EAM Company – Opt-Out by Company

- WO Email Opt-Out by Category, Status, Priority

Main Site Employee Job Role **Opt-Out** Address Doc Customize

EAM Company (1 of 1)

Customize

Company:

Alias:

WO Cat. Opt-out (1)

Customize

<input type="checkbox"/>	#	Category	Modified by	Last modified	
<input type="checkbox"/>	1	Preventive	Calem Eam	2/25/12 1:43 PM ...	

WO Status Opt-out (0)

Customize

<input type="checkbox"/>	#	Status	Modified by	Last modified	
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WO Priority Opt-out (1)






Customize


<input type="checkbox"/>	#	Priority	Modified by	Last modified	
<input type="checkbox"/>	1	P5	Calem Eam	6/14/14 8:08 PM Ce...	

EAM Company – Addresses

Main Site Employee Job Role Opt-Out **Address** Doc Customize





EAM Company (1 of 1)

     Customize

Company:  CalemEAM Inc.

Alias:

Address (3)

    Customize

<input type="checkbox"/>	Address	Note	Addr. type	Last modified
<input type="checkbox"/>	10012 San Jacinto Blvd, Austin, TX 78701		Other	10/19/13 5:10 A..
<input type="checkbox"/>	Acme Maintenance Services, Inc. Central Stor...		Shipping	2/13/10 12:51 A..
<input type="checkbox"/>	Acme Maintenance Services, Inc. 12391 San ...		Billing	2/13/10 12:52 A..

Main Site Employee Job Role Opt-Out Address **Doc** Customize

EAM Company (1 of 1)

Customize

Company:

Alias:

Documents (2)

Customize

<input type="checkbox"/>	Seq	Document	Note	Last modified	
<input type="checkbox"/>	10		My doc	12/17/12 7:07 ...	

Attachment (0)

View file Download All Customize

<input type="checkbox"/>	File	Note	Last modified	
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EAM Site – Creation

- Set Site name
- Set Service request in email from the domain defined
- Default Tech for the site if any

[EAM Company](#) > EAM Site Create

EAM Site

Save Cancel Customize

Value is required: Site

Site:

Service site:

Inventory site:

PO site:

Request in email:

Email domain:

Charge rebuild use?:




Allow negative stock?:

Contact:

Cost center:

Default Tech:

- WO Terminal Status template for workflow notification
- Asset Pattern: Site based asset numbering
- WO Pattern: Site based WO numbering
- REQ Pattern: Site based REQ numbering
- Boilerplate Safety/Steps for Corrective (CM) and Preventive Work Orders
- SLA Contract
- Tech Photo
- No WO Email

WO TS template:	<input type="text"/>		
Asset pattern?:	<input type="checkbox"/>		
Asset pattern:	<input type="text"/>	Asset seq:	<input type="text"/>
WO pattern?:	<input type="checkbox"/>		
WO pattern:	<input type="text"/>	WO seq:	<input type="text"/>
REQ pattern?:	<input type="checkbox"/>		
REQ pattern:	<input type="text"/>	REQ seq:	<input type="text"/>
WO Default Steps			
CM Plan?:	<input type="checkbox"/>	CM Plan:	<input type="text"/> 
PM Plan?:	<input type="checkbox"/>	PM Plan:	<input type="text"/> 
SLA contract?:	<input type="checkbox"/>	SLA contract:	<input type="text"/> 
Crew hrs?:	<input type="checkbox"/>	Crew hrs/day:	<input type="text"/>
No tech photo:	<input type="checkbox"/>	No WO Email?:	<input type="checkbox"/>

EAM Site – WO Email Opt-Out

- WO Email Opt-Out at Site Level
- Opt-Out by Category, Status and Priority

Main **Opt-Out** Monitor Team Doc Business Lines Location Customize

EAM Site (1 of 8)

Customize

Site: Note:

Service site: [FARADAY](#) PO site: [FARADAY](#)

WO Cat. Opt-out (0)

Customize

<input type="checkbox"/>	#	Category	Last modified
No results found.			

EAM Site – Planner/Monitor/Acceptor

- Work Order Planner, Monitor and Acceptor for the Site

Main Opt-Out **Monitor** Team Doc Business Lines Location Customize

EAM Site (1 of 8)

Customize

Site: Note:

Service site: [FARADAY](#) PO site: [FARADAY](#)

Monitor User (4)

Customize

<input type="checkbox"/>	#	Full name	Monitor Role	Note	Last modified
<input type="checkbox"/>	1	Calem Eam	WO Monitor	Manual entry	9/28/14 6:21 PM C..
<input type="checkbox"/>	2	Calem Test (no Login...	WO Planner	Manual entry	9/28/14 6:21 PM C..
<input type="checkbox"/>	3	Calem Eam	WO Planner	Manual entry	9/28/14 6:21 PM C..
<input type="checkbox"/>	4	Calem Test (no Login...	WO Monitor	Manual entry	9/28/14 6:21 PM C..

Work acceptor (0)

Customize

<input type="checkbox"/>	Full name	Note	Last modified
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- Teams for the Site
- Users assigned to the Site

Main Opt-Out Monitor **Team** Doc Business Lines Location Customize

EAM Site (1 of 8)

Customize

Site: Note:

Service site: [FARADAY](#) PO site: [FARADAY](#)

Team (1)

Customize

<input type="checkbox"/>	#	Team	Lead	Note	Last modified
<input type="checkbox"/>	1	TigerTeam			1/11/16 2:21 PM C..

Site Assignment (0)

Customize

<input type="checkbox"/>	#	Full name	Note	Part time?	Part time %	Last modified
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- Doc and Attachment for the Site

Main	Opt-Out	Monitor	Team	Doc	Business Lines	Location	Customize
EAM Site (1 of 8)							
				Customize			
Site:	<input type="radio"/>	FARADAY			Note:	My company	
Service site:	FARADAY			PO site:	FARADAY		
Documents (0)							
			Customize				
<input type="checkbox"/>	Seq	Document	Note	Last modified			

Attachment (0)							
			View file	Download All	Customize		
<input type="checkbox"/>	File	Note			Last modified		

- Business Lines for the Site
- Skill-Match Assignment

Main	Opt-Out	Monitor	Team	Doc	Business Lines	Location	Customize
EAM Site (1 of 8)							
				Customize			
Site:	FARADAY			Note:	My company		
Service site:	FARADAY			PO site:	FARADAY		
Business lines (0)							
			Customize				
<input type="checkbox"/>	Business Line	Last modified					

- Locations in the Site

Main Opt-Out Monitor Team Doc Business Lines **Location** Customize

EAM Site (1 of 8)

Customize

Site: Note:

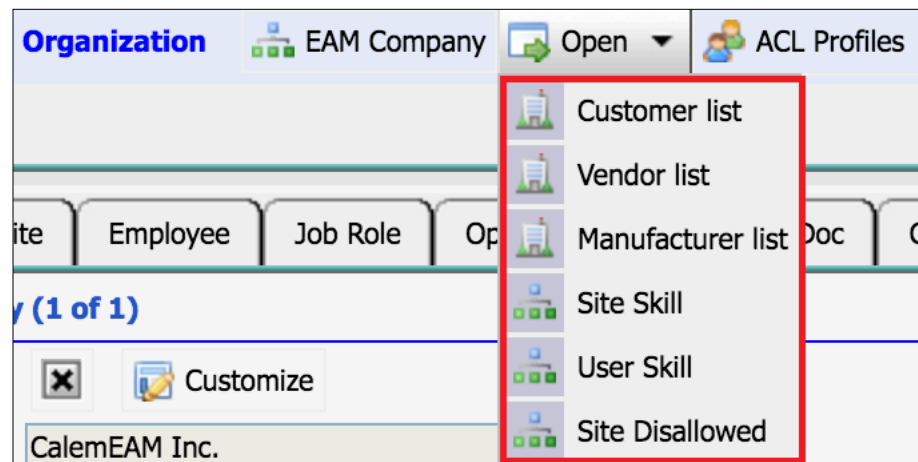
Service site: [FARADAY](#) PO site: [FARADAY](#)

Location (2)

Customize

<input type="checkbox"/>	#	Location	Note	Loc group	Loc category	Status	Owner	Last modified
<input type="checkbox"/>	1	FARADAY						7/23/13 3:...
<input type="checkbox"/>	2	Tire Yard		PROD.TIRE		In service		6/20/14 10...

- Customers
- Vendors
- Manufacturers
- Skill Management
- Site Disallowed



Customer – Creation

- Set Customer “Company”
- Set Phone, Email, Default SLA
- “Client acct” for Financial Readiness

[Customer list List](#) > Customer Create

Customer

Save Cancel Customize

Value is required: Company

Company:

Alias:

Note:

Comment:

Phone:

Email:

Fax:

URL:

Client acct.:

No tech photo:

SLA contract?:

SLA contract:

- Customer Sites
- Addresses

Main Site Employee Job Role Item Opt-Out Doc Customize

Customer (1 of 7)

Customize

Company: ARNG

Alias:

Customer Site (2)

Customize

<input type="checkbox"/>	Site	Note	Service site	Inventory site?	Inventory site	Last modified
<input type="checkbox"/>	ARNG	ARNG info 1	MySite_CA	<input checked="" type="checkbox"/>		2/22/16 9:30 AM ...
<input type="checkbox"/>	ARNG-Test	ARNG info 2		<input type="checkbox"/>	ARNG	2/22/16 9:30 AM ...

Address (0)






Customize

<input type="checkbox"/>	Address	Note	Addr. type	Last modified
<input type="checkbox"/>				

- Customer Employees
- May Log Into Calem


Main Site **Employee** Job Role Item Opt-Out Doc Customize







Customer (1 of 7)

     Customize

Company:

Alias:

 **Employee (1)**

      Customize






<input type="checkbox"/>	#	Full name	Note	Status	Site	Last modified
<input type="checkbox"/>	1	Test ARNG			ARNG	4/10/12 10:21 AM ...


Customer – WO Email Opt-Out

- Opt-Out of WO Emails by Category, Status and Priority

Main Site Employee Job Role Item **Opt-Out** Doc Customize





Customer (1 of 7)

     Customize

Company:  ARNG

Alias:

WO Cat. Opt-out (0)






    Customize


<input type="checkbox"/>	#	Category	Modified by	Last modified
No results found.				

Customer – Doc & Attachment

Main Site Employee Job Role Item Opt-Out **Doc** Customize





Customer (1 of 7)

     Customize

Company:  ARNG







Alias:

Documents (0)

    Customize

<input type="checkbox"/>	Seq	Document	Note	Last modified
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Attachment (0)

    View file  Download All  Customize

<input type="checkbox"/>	File	Note	Last modified
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Customer Site – Creation

- Set “Site” name
- Set Service Site and Inventory Site
- Set Service Request Email Flag and Domain
- Set Credit Hold and Customer # for Financial Control

[Customer](#) > Customer Site Create

Customer Site

Save Cancel Customize

Value is required: Site

Site:

Inventory site?:

Service site: **Inventory site:**

Request in email:

Email domain:

Contact:

Default Tech:

Credit hold?:

Customer #:

Customer Site – Defaults

- Site Level Defaults for Boilerplate CM/PM Steps
- SLA, Numbering for WO, Time Zone, Locale

Main		Opt-Out	Monitor	Doc	Business Lines	Location	Member	Customize
Customer Site (1 of 2)								
↑ ↓ × Customize								
Company: <input type="radio"/> ARNG								
Site: <input type="radio"/> ARNG								
Contact:	Test ARNG	Credit hold?:	<input type="checkbox"/>					
Default Tech:		Customer #:	<input type="text" value="335599"/>					
Note:	<input type="text" value="ARNG info 1"/>							
Service site:	MySite_CA							
Inventory site?:	<input checked="" type="checkbox"/>	Inventory site:	<input type="checkbox"/>					
Request in email:	<input checked="" type="checkbox"/>	Disabled?:	<input type="checkbox"/>					
Email domain:	<input type="text" value="calemeam.com"/>	Out of service?:	<input type="checkbox"/>					
Phone:	<input type="text"/>	Fax:	<input type="text"/>					
Email:	<input type="text"/>							
URL:	<input type="text"/>							
WO Default Steps								
CM Plan?:	<input type="checkbox"/>	CM Plan:						
PM Plan?:	<input type="checkbox"/>	PM Plan:						
Work days:	<input type="text"/>	Work hours:	<input type="text"/>					
WO pattern?:	<input type="checkbox"/>	WO seq:	<input type="text"/>					
WO pattern:	<input type="text"/>							
SLA contract?:	<input type="checkbox"/>	SLA contract:						
Currency:		Locale:						
Time Zone:	US/Eastern	No WO Email?:	<input type="checkbox"/>					
No tech photo:	<input type="checkbox"/>							

Customer Site – WO Email Opt-Out

- Site level opt-out by Category, Status and Priority

Main Opt-Out Monitor Doc Business Lines Location Member Customize

Customer Site (1 of 2)

Customize

Company: [ARNG](#)

Site:

WO Cat. Opt-out (0)

Customize

<input type="checkbox"/>	#	Category	Last modified
No results found.			

Customer Site – Monitor/Planner/Acceptor

CalemEAM

- WO Monitor/Planner
- WO Acceptor

Main Opt-Out **Monitor** Doc Business Lines Location Member Customize

Customer Site (1 of 2)

Customize

Company: [ARNG](#)

Site:

Monitor User (1)

Customize

<input type="checkbox"/>	#	Full name	Monitor Role	Note	Last modified
<input type="checkbox"/>	1	Administrator	WO Monitor	Manual entry	6/4/15 12:20 PM C..

Work acceptor (0)

Customize

<input type="checkbox"/>	Full name	Note	Last modified
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Customer Site – Other Data

- Doc & Attachment
- Business Lines
- Locations
- Users assigned to the Site

Main Opt-Out Monitor **Doc** Business Lines Location **Member** Customize

Customer Site (1 of 2)

Customize

Company: [ARNG](#)

Site:

Site Assignment (2)

Customize




<input type="checkbox"/>	#	Full name	Note	Part time?	Part time %	Last modified
<input type="checkbox"/>	1	Test ARNG	Upgrade to R8.5i	<input type="checkbox"/>		1/21/14 9:44 AM ...
<input type="checkbox"/>	2	Ben Manning		<input type="checkbox"/>		12/26/13 4:55 PM...


Vendor Company – Creation


- Set Vendor Name
- Vendor Site is created with the Vendor's Name

[Vendor list List](#) > Vendor Create

Vendor

 Save  Cancel  Customize

 Value is required: Company

Company: 

Alias:

Note:

Is manufacturer?:

Comment:


Phone:

Email:

Fax:

URL:

SLA contract?:

SLA contract: 

Vendor Company – Details

- Vendor Sites – Service Site Flag for Work Orders
- Vendor Employees
- Vendor Docs & Attachments
- Vendor Addresses
- Vendor Site has Docs & Attachments

The screenshot shows the 'Vendor (1 of 255)' details page. The 'Site' tab is active. The company name is 'A-VOX Systems'. Below, there is a section for 'Site (1)' with a table listing the site details. The 'Service site?' checkbox is checked and highlighted with a red box.




<input type="checkbox"/>	Site	Note	Service site?	Disabled?	Last modified
<input type="checkbox"/>	A-VOX Systems	Vendor from NH	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3/10/13 1:24 AM Ce...


Manufacturer Company – Creation


- Set Manufacturer Name
- Manufacturer Site is created with the Manufacturer's Name

[Manufacturer list List](#) > Manufacturer Create

Manufacturer

 Save  Cancel  Customize

 Value is required: Company

Company: 

Alias:

Note:

Is vendor?:

Comment:

Phone:

Email:

Fax:






URL:

Manufacturer Company – Details

- Sites
- Employees
- Doc & Attachment

Main Site Employee Doc Customize

Manufacturer (2 of 249)

     Customize

Company:

Alias:

Note:

Is vendor?:

Comment:

Address:

User – Creation

- Set Full Name, Site
- “Is EAM Crew?” for WO Assignment, Job Role Required
- Email and Email SMS for email notifications
- “User name” and “Password” for Login

[User list List](#) > User Create

User

Save Cancel Customize

Value is required: Full name

Full name:

Note:

Status: Active

Employee #:

Salutation:

Suffix:

Is contractor?:

Vendor site:

Site:

Location:

Is EAM crew?:

Availability (%):

App profile:

Device profile:

No WO Email?:

No SR Email?:

Locale:

No SMS?:

Job

Job role:

Job title:

Supervisor:

Team:

Account:

Dept:

Access rights

Login allowed?:

Search admin: No admin

User name:

Password: Retype:

Login till:

Communication

Phone:

Mobile:

Email:

Email SMS:

- Must have at least one ACL Profile for login

Main | **ACL profile** | Opt-Out | Membership | Doc | Customize

User (1 of 45)

Customize

Full name: **Note:**

Status: **Employee #:**

User ACL (13)

Customize

<input type="checkbox"/>	#	Profile	Profile access	Note	Last modified
<input type="checkbox"/>	1	Meter-Mod	All		4/2/13 8:58 AM C...
<input type="checkbox"/>	2	MySite-Loc_Exclude	All	Manual entry	4/11/16 11:25 AM...
<input type="checkbox"/>	3	MySite-Loc-Include	All	Manual entry	4/11/16 10:00 AM...
<input type="checkbox"/>	4	OfflineTech-MySite	All		11/4/09 8:20 PM ...
<input type="checkbox"/>	5	Administrator	All		10/21/13 9:14 AM...
<input type="checkbox"/>	6	Users-MySite	All		4/15/11 10:41 AM...
<input type="checkbox"/>	7	Profile_READ-ONLY	All		9/15/10 2:48 PM ...

User – Details

- Assigned to Sites, Teams
- Opt-Out emails by WO Category, Status and Priority
- Doc & Attachment

Main | ACL profile | Opt-Out | **Membership** | Doc | Customize

User (1 of 45)

Customize

Full name: **Note:**

Status: **Employee #:**

Site Assignment (1)

Customize

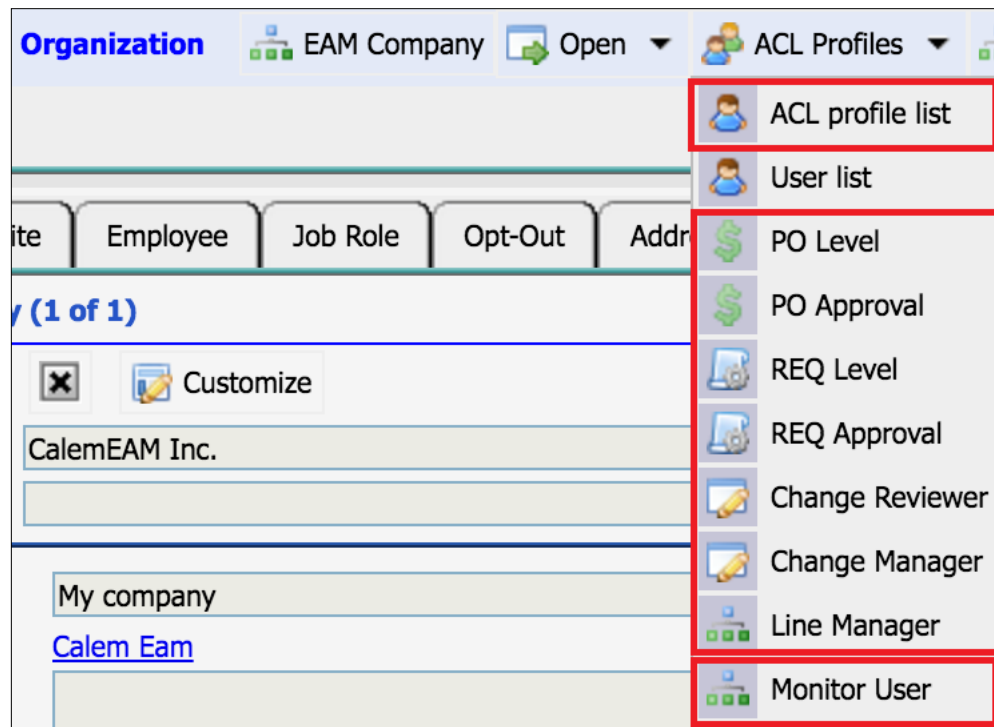
<input type="checkbox"/>	Full name	Site	Note	Part time?	Part time %	Last modified
<input type="checkbox"/>	Administrator	MySite	Upgrade to R7.2e	<input type="checkbox"/>		6/23/15 6:40 PM ...

Team Member (1)

Customize

<input type="checkbox"/>	Full name	Team	Note	Last modified
<input type="checkbox"/>	Administrator	MyCA_Team1	Auto-added by user editing.	1/11/16 4:13 PM Cen...

- **ACL Profile List – Access Control**
- **User Management**
 - Set “Status” not “Active” will block Login
- REQ, Purchase and Change Management Roles
- **User Roles for Workflow Email Notifications**



User Roles for Workflow – Creation

- Select Roles

[Monitor User List](#) > Option Lookup

Option (19)

Select (1+) Cancel





<input type="checkbox"/>	#	Option
<input checked="" type="checkbox"/>	1	WO Planner
<input checked="" type="checkbox"/>	2	WO Monitor
<input type="checkbox"/>	3	SR Dispatcher
<input type="checkbox"/>	4	SR Monitor
<input type="checkbox"/>	5	Change Monitor (MOC)
<input type="checkbox"/>	6	Change Planner (MOC)
<input type="checkbox"/>	7	Asset Monitor
<input type="checkbox"/>	8	Contract Monitor
<input type="checkbox"/>	9	REQ Approver
<input type="checkbox"/>	10	REQ Buyer
<input type="checkbox"/>	11	REQ Monitor
<input type="checkbox"/>	12	Inventory Monitor
<input type="checkbox"/>	13	Training Monitor
<input type="checkbox"/>	14	Login Monitor
<input type="checkbox"/>	15	PO Approver
<input type="checkbox"/>	16	PO Monitor
<input type="checkbox"/>	17	Integration Monitor
<input type="checkbox"/>	18	Report Monitor
<input type="checkbox"/>	19	SW Monitor

User Roles for Workflow – Creation

- Select Sites

Monitor User List > Option Lookup > Site Lookup

Site (25)


Select (1+) Cancel     Customize





<input type="checkbox"/>	#	Site	Service site	Note	Company	Class	Last modified
<input type="checkbox"/>	1	ARNG	MySite_CA	ARNG info 1	ARNG	Customer	2/22/16 9:30 AM Cen...
<input type="checkbox"/>	2	ARNG-Test		ARNG info 2	ARNG	Customer	2/22/16 9:30 AM Cen...
<input checked="" type="checkbox"/>	3	Austin-TX-DMV			TX-DMV	Customer	2/15/16 4:50 PM Centra
<input type="checkbox"/>	4	Customer site -002			Customer-001	Customer	12/26/13 12:17 PM C..
<input checked="" type="checkbox"/>	5	Customer site-001			Customer-001	Customer	12/26/13 12:21 PM Cen
<input type="checkbox"/>	6	Customer site-002			Customer-001	Customer	9/18/14 6:57 AM Cen...
<input checked="" type="checkbox"/>	7	Customer-001			Customer-001	Customer	12/26/13 12:25 PM Cen
<input type="checkbox"/>	8	FARADAY	FARADAY	My company	CalemEAM Inc.	Service Provider	2/17/16 4:47 PM Cen...
<input checked="" type="checkbox"/>	9	JJ.Austin	MySite	JJ's Austin Site	JJ-Chain	Customer	2/22/16 5:14 PM Centra
<input type="checkbox"/>	10	JJ.CA	MySite	JJ's CA site	JJ-Chain	Customer	2/22/16 5:14 PM Cen...
<input type="checkbox"/>	11	KRT-New	KRT-New	My company	CalemEAM Inc.	Service Provider	2/15/16 4:49 PM Cen...

User Roles for Workflow – Creation

- Select Users

[Monitor User List](#) > [Option Lookup](#) > [Site Lookup](#) > User Lookup

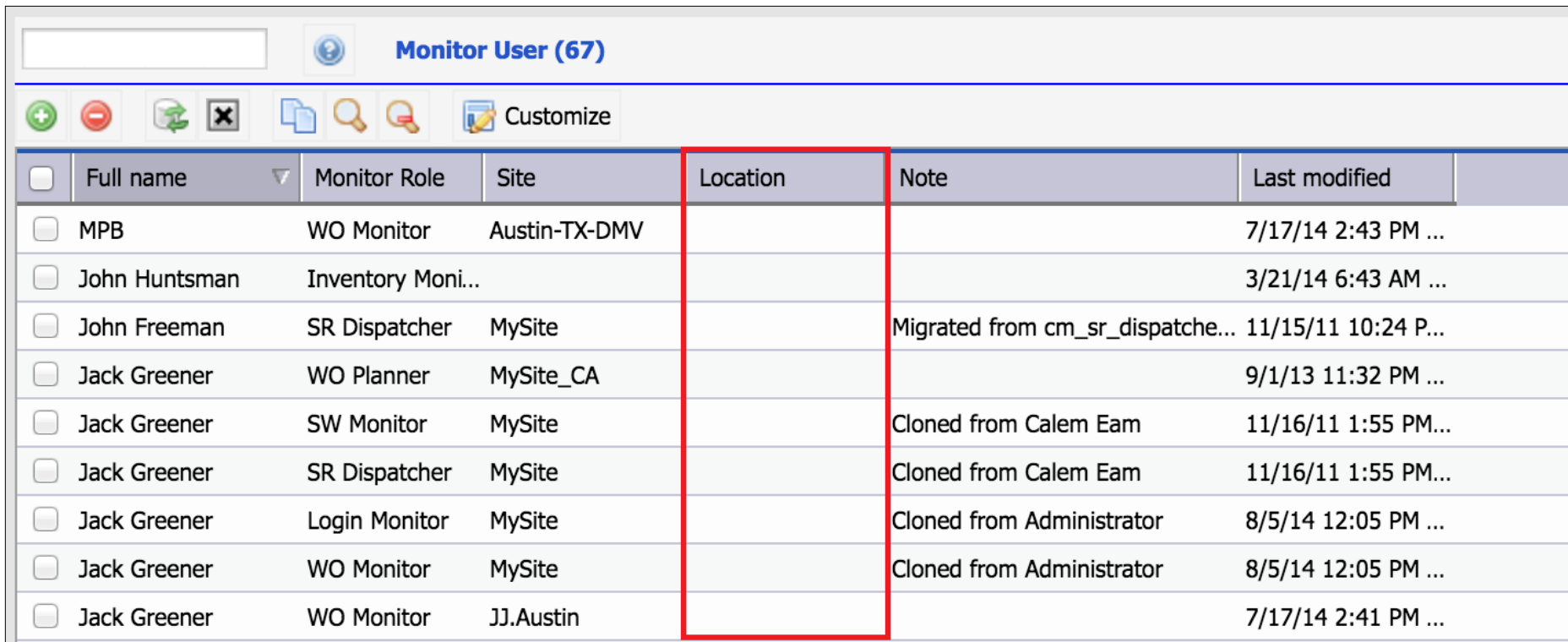
 **User (45)**

Select (1+) Cancel     Customize

<input type="checkbox"/>	#	Full name	User name	Login allowed?	Note	Job role	Team	Dept	Site
<input type="checkbox"/>	1	Administrator	admin	<input checked="" type="checkbox"/>		ELEC-L2	MyCA_Team1	MAINTENA...	MySite
<input type="checkbox"/>	2	Anonymous	anonymous	<input checked="" type="checkbox"/>					MySite
<input type="checkbox"/>	3	API	calem_api	<input checked="" type="checkbox"/>					MySite
<input checked="" type="checkbox"/>	4	Ben Manning	benmanning	<input checked="" type="checkbox"/>		008			JJ.CA
<input checked="" type="checkbox"/>	5	Calem Eam	calem	<input checked="" type="checkbox"/>		ELEC-L2	MyTeam2		MySite
<input checked="" type="checkbox"/>	6	Calem Test (no Login)	u011	<input checked="" type="checkbox"/>		002	Network.Team		MySite
<input type="checkbox"/>	7	Calem Test-A	u013	<input checked="" type="checkbox"/>		004	My_Team2		MySite
<input type="checkbox"/>	8	Calem Test2 (no Log...	u012	<input checked="" type="checkbox"/>		006	MyCA_Team1		MySite

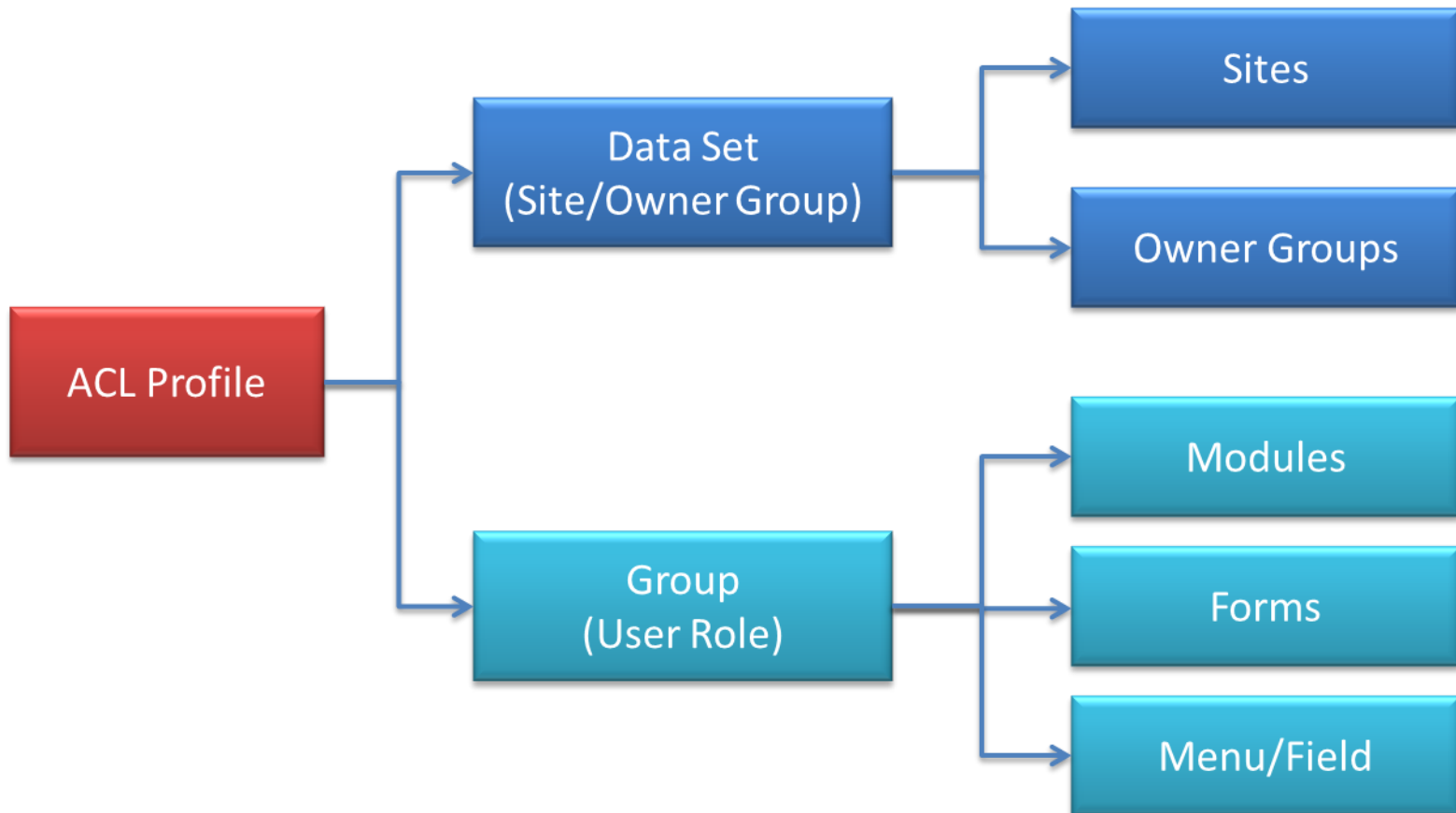
User Roles for Workflow

- Users with Roles for Workflow
- No Site: get notifications for all sites
- Set Location: get notifications for that location's work orders



The screenshot shows a software interface titled "Monitor User (67)". Below the title is a toolbar with icons for adding (+), removing (-), refreshing, deleting (X), and a "Customize" button. The main area contains a table with the following columns: Full name, Monitor Role, Site, Location, Note, and Last modified. The "Location" column is highlighted with a red border. The table lists several users, including MPB, John Huntsman, John Freeman, and multiple instances of Jack Greener with various roles like WO Monitor, Inventory Moni..., SR Dispatcher, WO Planner, SW Monitor, SR Dispatcher, Login Monitor, and WO Planner. The sites listed include Austin-TX-DMV, MySite, and MySite_CA.

<input type="checkbox"/>	Full name	Monitor Role	Site	Location	Note	Last modified
<input type="checkbox"/>	MPB	WO Monitor	Austin-TX-DMV			7/17/14 2:43 PM ...
<input type="checkbox"/>	John Huntsman	Inventory Moni...				3/21/14 6:43 AM ...
<input type="checkbox"/>	John Freeman	SR Dispatcher	MySite		Migrated from cm_sr_dispatche...	11/15/11 10:24 P...
<input type="checkbox"/>	Jack Greener	WO Planner	MySite_CA			9/1/13 11:32 PM ...
<input type="checkbox"/>	Jack Greener	SW Monitor	MySite		Cloned from Calem Eam	11/16/11 1:55 PM...
<input type="checkbox"/>	Jack Greener	SR Dispatcher	MySite		Cloned from Calem Eam	11/16/11 1:55 PM...
<input type="checkbox"/>	Jack Greener	Login Monitor	MySite		Cloned from Administrator	8/5/14 12:05 PM ...
<input type="checkbox"/>	Jack Greener	WO Monitor	MySite		Cloned from Administrator	8/5/14 12:05 PM ...
<input type="checkbox"/>	Jack Greener	WO Monitor	JJ.Austin			7/17/14 2:41 PM ...



ACL Profile: Site/Owner Groups

- Data Access by Sites
- Data Access by Owner Groups inside Sites

Site Examples	Owner Group Examples
<p>Regions of a state:</p> <p>District 1</p> <p>District 2</p> <p>District 3</p> <p>District 4</p>	<p>Assets by Maintenance Ownerships:</p> <p>IT</p> <p>Facility</p> <p>Production</p>
<p>Offices of an org:</p> <p>TX</p> <p>NY</p> <p>SC</p> <p>FL</p>	

ACL Profile: Group (User Role)

- **No Customization:** user level customization not allowed
- **Data permission:** No Insert/No Edit/No Delete

Group (User Role) Samples	Flags
Supervisors with all rights	All Allowed
Technicians who cannot delete data (No access: Admin/Org modules, Readonly: Inventory and Purchase)	No Deletion No Customization
Inventory Staff who cannot delete data (No access: Admin/Org modules, Readonly: Work Order)	No Deletion
Operational Staff who can create requests (Create: Service Request and Work Orders)	No Deletion No Edit
Others who can only view data (No access: Admin/Org modules, Readonly: all modules accessible)	No Insert No Edit No Delete

ACL Profile Samples

ACL Profile	Sites	Owner Group	Group (User Role)
TX-Tech	TX	All	Technician
All-Supervisor	All	All	Supervisor
TX-Tech-IT	TX	IT	Technician
TX/SC-Supervisor-Prod	TX, SC	Production	Supervisor
Admin	All	All	Admin

ACL Profile – Creation

- Set UI Group for Desktop (web), Phone, Tablet, Touch (desktop)
- Set Access Permission (No Insert, etc.)
- Set “All Site Access” to allow all site data access
 - Uncheck this flag to set specific sites

[ACL profile list List](#) > ACL profile Create

ACL profile

Save Cancel Customize

Value is required: Profile

Profile:

Note:

Desktop group:

Phone group:

Tablet group:

Touch group:

All site access: **Profile access:** ▼

No Insert: **No Delete:**

No Edit: **No Customize:**

ACL Profile – Site Access

- Add Sites to allow site-specific access
- Company ACL is auto-adjusted

Main Site User Customize

ACL profile (1 of 32)

Customize

Profile:

Note:

Site ACL (1)

Customize

<input type="checkbox"/>	#	Site	Note	Last modified
<input type="checkbox"/>	1	Austin-TX-DMV	Manual entry	9/28/14 8:39 PM Ce...

Company ACL (1)

Customize

<input type="checkbox"/>	#	Company	Note	Last modified
<input type="checkbox"/>	1	TX-DMV	Having access to site	9/28/14 8:39 PM C...

ACL Profile – Owner Group

- Owner Group for access control of assets and locations within sites
- Use either inclusion or exclusion, not both

The screenshot shows a web application interface for configuring an ACL profile. At the top, there are navigation tabs: Main, Site, User, Owner Group (selected), Item Owner Group, and Customize. Below the tabs, the page title is "ACL profile (8 of 47)".

The "ACL profile" section includes a toolbar with icons for up, down, delete, and customize. The "Profile:" dropdown is set to "CM_Supervisor" and the "Note:" field contains "Test group for supervisors".

The "Owner Group (Inclusion) (2)" section has a toolbar with icons for add, remove, refresh, search, and customize. It contains a table with the following data:

<input type="checkbox"/>	#	Owner Group	Note	Last modified
<input type="checkbox"/>	1	IT	Manual entry	10/21/17 4:08 P...
<input type="checkbox"/>	2	Facility	Manual entry	10/21/17 4:08 P...

The "Owner Group (Exclusion) (0)" section has a toolbar with icons for add, remove, refresh, search, and customize. Below it is a table header with columns: #, Owner Group, Note, Last modified. The text "No results found." is displayed at the bottom right of this section.

ACL Profile – User Assignment

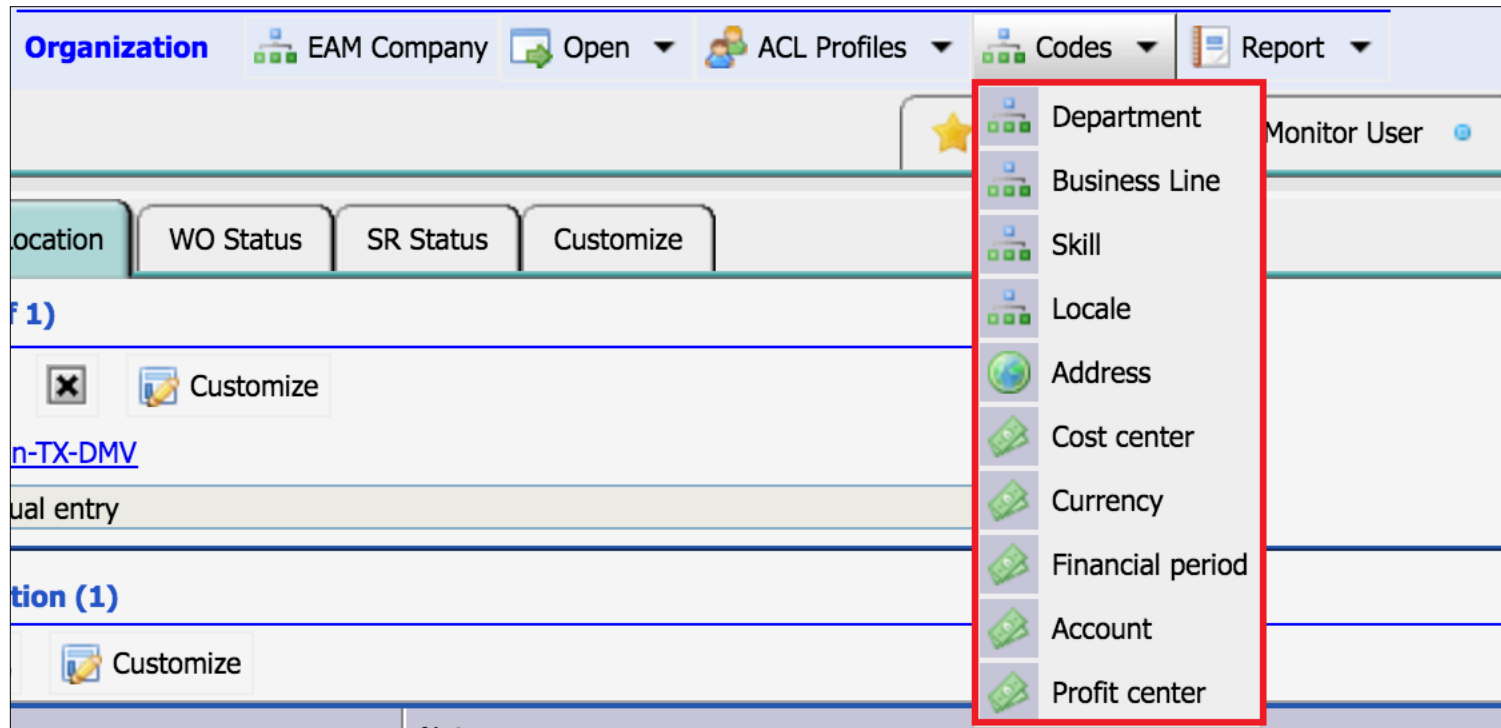
- Assign users to this ACL Profile

The screenshot displays the 'User' tab of the ACL Profile configuration interface. At the top, there are navigation tabs: 'Main', 'Site', 'User' (selected), and 'Customize'. Below the tabs, the section is titled 'ACL profile (1 of 32)'. A toolbar contains icons for edit, up, down, close, and a 'Customize' button. The 'Profile:' field is set to 'Meter-Mod', and there is an empty 'Note:' field. Below this, a section titled 'User ACL (1)' contains a search bar and a toolbar with icons for add, remove, refresh, search, and a 'Customize' button. A table lists the assigned users:

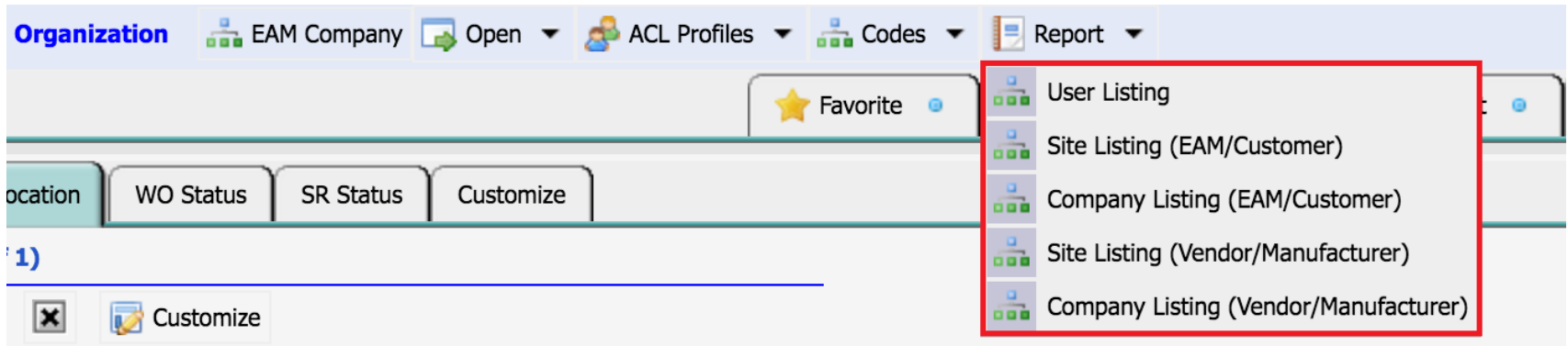
<input type="checkbox"/>	#	Full name	Note	Last modified
<input type="checkbox"/>	1	Administrator		4/2/13 8:58 AM Ce...

Mult-Site – Codes

- Manage Codes for Mult-Sites
- Multi-Currency is supported



Mult-Site – Reports



- Create an EAM Site
- Create a customer and site
- Create a vendor and site
- Create a manufacturer and site
- Set up WO planner and monitor
- Set up WO accepter
- Set up SR monitor and dispatcher
- Assign a service technician to two sites

- Create an ACL Profile for maintenance supervisors
- Create an ACL Profile for maintenance staff
- Create a user for login
 - Username and Password are set
- Assign the maintenance staff profile to the user

Multi-Site
Access Control

Screen & Data
Customization

Workflow
ScheduledTasks

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



Do Not Send List

- Tech Staff should not be sent for on-site service
- By default these users do not show in the WO Assignment List

<input type="checkbox"/>	#	Full name	Site	Company	Last modified
<input type="checkbox"/>	1	Administrator		CalemEAM Inc.	10/12/15 6:34 P...
<input type="checkbox"/>	2	IT BENCHSTOCK	KRT-New	CalemEAM Inc.	10/12/15 2:44 P...
<input type="checkbox"/>	3	Ben Manning		JJ-Chain	10/12/15 2:10 P...

Skills – Site and User Skills

Site Skill (6)

<input type="checkbox"/>	Company	Site	Business Line	Vendor	Certificate	Cert Level
<input checked="" type="checkbox"/>	CalemEAM Inc.	MySite	video	Agilent	Cert	
<input type="checkbox"/>	TX-DMV		Camera	3M	Cert	1,000
<input type="checkbox"/>	CalemEAM Inc.	TX_MySite	video	Agilent	Cert	
<input type="checkbox"/>	JJ-Chain	JJ.Austin	Camera	3M	Cert	1,000
<input type="checkbox"/>	JJ-Chain		Camera	3M	Cert	1,000
<input type="checkbox"/>	ARNG		Camera	3M	Cert	1,000

User Skill (4)

<input type="checkbox"/>	Full name	Business Line	Vendor	Certificate	Cert Level	License	Expiration
<input type="checkbox"/>	John Freeman	Camera	3M	Cert	1,000		
<input type="checkbox"/>	Administrator	video	Agilent	Cert			
<input type="checkbox"/>	Calem Eam	Camera	Allied Healthcare P..	Cert		4567890	2/23/13
<input type="checkbox"/>	Administrator	video	Agilent	Cert		456789	2/9/13

Customer – Labor Rates

- Labor Rates for Customer
- Labor Rates for Customer Sites

Main Site Employee **Job Role** Item Opt-Out Doc Customize

Customer (1 of 7)

Customize

Company:

Alias:

Job Role (Customer) (1)

Customize

<input type="checkbox"/>	Job role	Rate (USD)	Note	Last modified
<input type="checkbox"/>	002	55.00		3/27/15 10:43 A...

Job Role (Site) (1)

Customize

<input type="checkbox"/>	Site	Job role	Rate (USD)	Last modified
<input type="checkbox"/>	ARNG	002	25.00	3/27/15 2:58 P...

Customer – Spare Part Rates

- Parts Rates for Customer
- Parts Rates for Customer Sites

Main Site Employee Job Role **Item** Opt-Out Doc Customize

Customer (1 of 7)

Customize

Company:

Alias:

Item Price (Company) (2)

Customize

<input type="checkbox"/>	Item	Unit price ()	Currency	Last modified
<input type="checkbox"/>	Item.Uom_001	100.00		4/1/15 8:40 PM ...
<input type="checkbox"/>	05-01-0022	25.00	USD	3/30/15 5:12 PM..

Item Price (Site) (2)

Customize

<input type="checkbox"/>	Site	Item	Unit price ()	Currency	Last modified
<input type="checkbox"/>	ARNG	ITM-001	30.00		4/1/15 8:41 PM ...
<input type="checkbox"/>	ARNG	05-01-0022	38.00		3/30/15 5:21 PM...