Configuring Maximo for Capturing Work Order Feedback

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Overview

- Introduction
- Approach
- Requirements Gathering
- Design and Development
- Testing

Overview (Cont'd)

- Analysis
- Change Management
- Lessons Learned

Introduction

- York Region and Maximo
  - Since 2005 in Environmental Services
  - Version 7.5 with spatial GIS
- My Role
  - System Support Specialist since August 2012
  - Embedded within the business

Introduction (Cont'd)

- Operations, Maintenance and Monitoring
  - Largest users of Maximo
  - Spans 7 operational areas, maintains over 100 facilities and monitors over 20,000 Assets
- Maximo Five Year Road Map
  - Identified benefit from receiving feedback on work orders as a form of continuous improvement

Approach

- Gather Requirements
  - Week long sessions facilitated by Cohesive and held with anyone involved with asset reliability.
- Design, Build and Test
  - Capture actionable data

Approach (Cont'd)

- Analysis
  - Identify "Who" & "How" this data will be acted upon
- Change Management
  - Focus on the importance and value of this feedback

Requirements Gathering

- What data do we want to capture?
- November 2012, Cohesive facilitated week long session operators, maintainers, engineers and management
- Identified that Feedback was needed for:
  - Failure modes
  - PM & Job Plan tasks
  - Asset condition
  - Maintainability
  - Safety issues
  - Design change

Requirements Gathering (Cont'd)

- Detailed Screen Design
  - Electr[illegible] workflow [illegible] automated routing [illegible]
  - Drop down lists, yes/no questions, validated pick lists

Design

- Easy completion of Work Order
- Divided Feedback into 2 Sections:
  - Job Plans and Preventive Maintenance
  - Asset Condition and Update Information
- Moved Labor Actuals and Failure Reporting onto the same tab
- Added custom buttons for Change Status and Creating Follow Up Work Order

Development

- In House Development
  - requirements of the feedback form were fairly attainable utilizing Maximo's built in configuration tools
- Upgrade to Maximo 7.5
  - Includes Automation Scripts

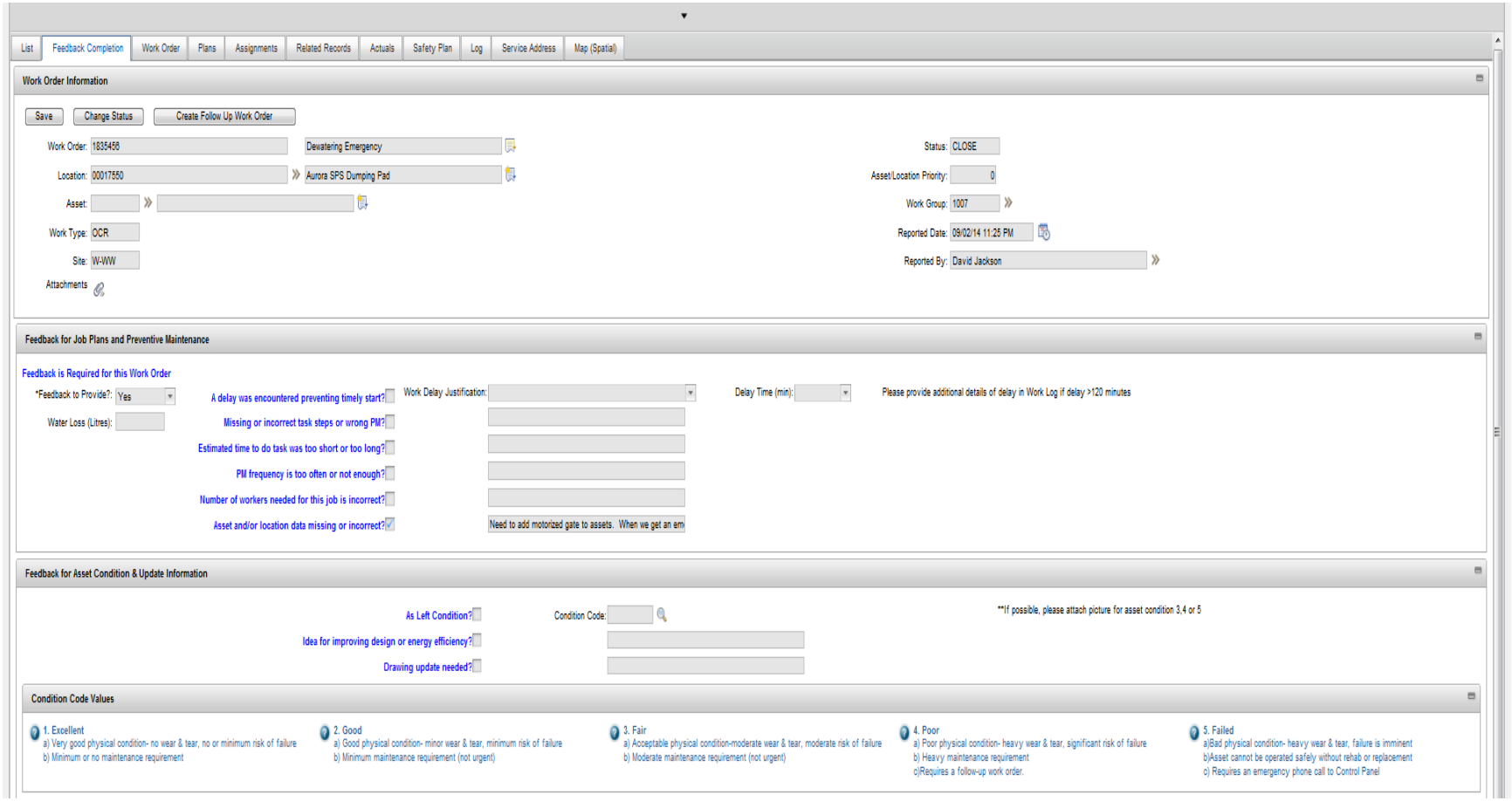
Development (Cont'd)

- Modifications to application XML's
- New fields added to Work Order table
- Utilized built in configuration tools:
  - Conditional Expressions
  - Global Data Restrictions
  - Automation Scripts

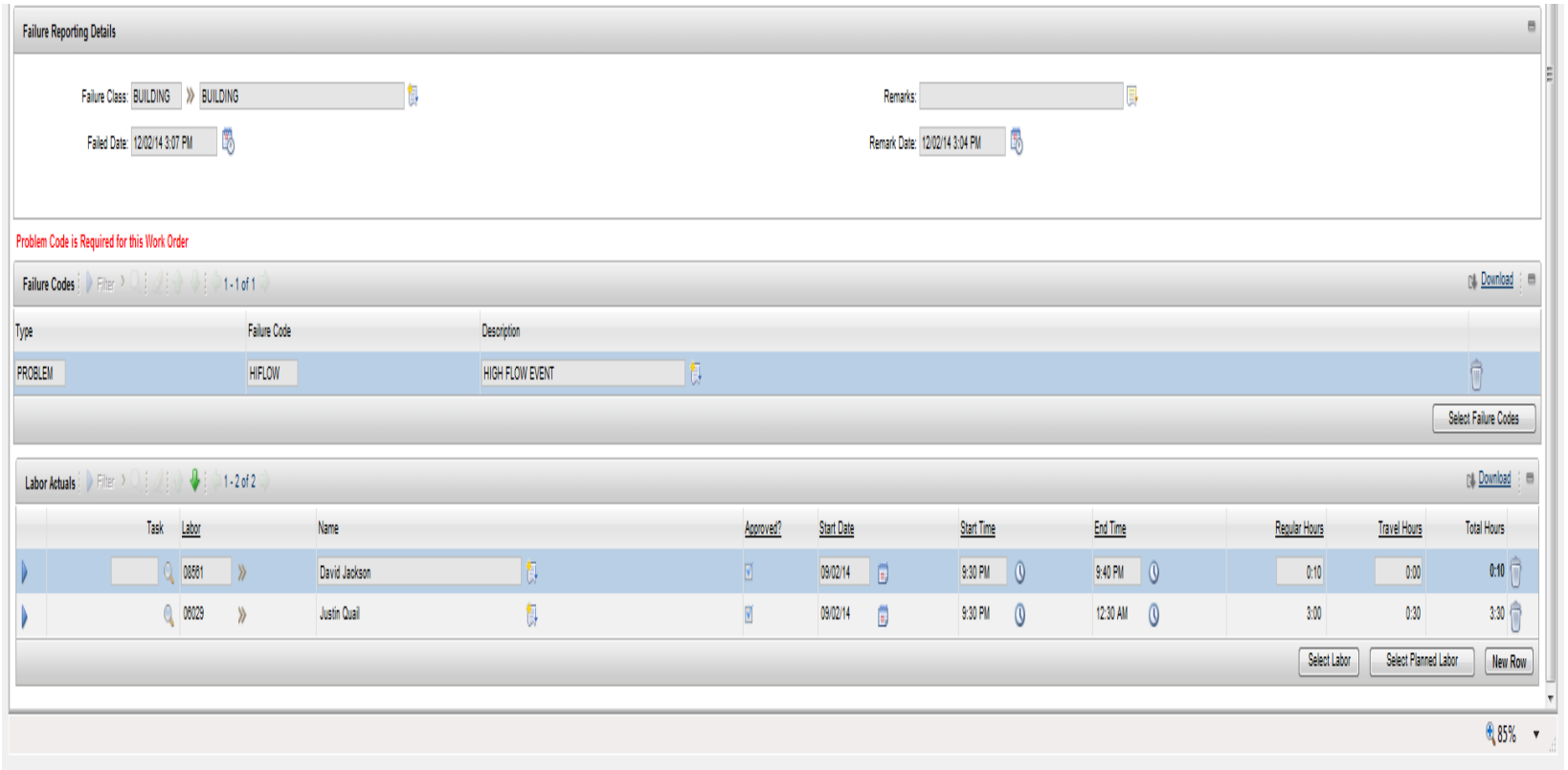
Testing

- Test script creation
- User Acceptance Testing
- Further improvements
- Reduce risk for training and Go-Live

Feedback Completion



Feedback Completion



Analysis

- Custom Reports:
  - Job Plans and Preventive Maintenance
  - Asset Condition and Update Information
- Feedback reviewed by Environmental Services Reliability Team
  - Representatives include: Operations, Infrastructure Management and Capital Delivery and Business Improvement resources

Change Management

- Communications sent from Management and Reliability Team
- Communication sent out weeks in advance of upcoming training & launch reiterating the importance
- 8 Sessions over 1 week facilitated by Cohesive
- Implementation the week after training

Lessons Learned

- Maximo skilled support
- Challenge to dedicate time for development and learning
- Internal business and technical knowledge

Questions

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