

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
 - ~~Electronic workflow for automated routing of requests~~
 - 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

List Feedback Completion Work Order Plans Assignments Related Records Actuals Safety Plan Log Service Address Map (Spatial)

Work Order Information

Save Change Status Create Follow Up Work Order

Work Order: 1835498 Dewatering Emergency Status: CLOSE

Location: 00017550 Aurora SPS Dumping Pad Asset/Location Priority: 0

Asset: Work Group: 1007

Work Type: OCR Reported Date: 09/02/14 11:25 PM

Site: W-WW Reported By: David Jackson

Attachments

Feedback for Job Plans and Preventive Maintenance

Feedback is Required for this Work Order

*Feedback to Provide?: Yes A delay was encountered preventing timely start? Work Delay Justification: Delay Time (min): Please provide additional details of delay in Work Log if delay >120 minutes

Water Loss (Litres): Missing or incorrect task steps or wrong PM? Estimated time to do task was too short or too long? PM frequency is too often or not enough? Number of workers needed for this job is incorrect? Asset and/or location data missing or incorrect? Need to add motorized gate to assets. When we get an em

Feedback for Asset Condition & Update Information

As Left Condition? Condition Code: **If possible, please attach picture for asset condition 3,4 or 5

Idea for improving design or energy efficiency? Drawing update needed?

Condition Code Values

1. Excellent
a) Very good physical condition-no wear & tear, no or minimum risk of failure
b) Minimum or no maintenance requirement

2. Good
a) Good physical condition-minor wear & tear, minimum risk of failure
b) Minimum maintenance requirement (not urgent)

3. Fair
a) Acceptable physical condition-moderate wear & tear, moderate risk of failure
b) Moderate maintenance requirement (not urgent)

4. Poor
a) Poor physical condition-heavy wear & tear, significant risk of failure
b) Heavy maintenance requirement
c) Requires a follow-up work order.

5. Failed
a) Bad physical condition- heavy wear & tear, failure is imminent
b) Asset cannot be operated safely without rehab or replacement
c) Requires an emergency phone call to Control Panel

Feedback Completion

Failure Reporting Details

Failure Class: BUILDING >> BUILDING

Failed Date: 12/02/14 3:07 PM

Remarks:

Remark Date: 12/02/14 3:04 PM

Problem Code is Required for this Work Order

Failure Codes: Filter 1 - 1 of 1

Type	Failure Code	Description
PROBLEM	HIFLOW	HIGH FLOW EVENT

Select Failure Codes

Labor Actuals: Filter 1 - 2 of 2

Task	Labor	Name	Approved?	Start Date	Start Time	End Time	Regular Hours	Travel Hours	Total Hours
	06691 >>	David Jackson	<input checked="" type="checkbox"/>	09/02/14	9:30 PM	9:40 PM	0:10	0:00	0:10
	09029 >>	Justin Quail	<input checked="" type="checkbox"/>	09/02/14	9:30 PM	12:30 AM	3:00	0:30	3:30

Select Labor Select Planned Labor New Row

85%

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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