

Workflows, Projects and Contracts: A Journey to Maximo Efficiency



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A Brief Summary

- A Condensed History of Maximo at UWA
- Introduction of a Project Management System
- Decision to make Maximo fulfil the role
- Custom Application Design and Build
- Contracts Application also Created
- Upgrade to Version 7.1.1.6
- Custom Applications Dropped in Favour of Maximo Vanilla Applications
- The Introduction of Workflows



Maximo at UWA

- Maximo, version 4.0.1, was initially implemented in 1999
- Minimal customisations, mainly screen layouts
- WO Tracking, Labour Reporting, Purchasing, Inventory
- Interface built to PeopleSoft
- Preventative Maintenance introduced after a few months



Upgrade to 5.2

- The first Web Based version we adopted was 5.2
- Project Management System was required
- Maximo was being used by one Manager
- System designed and built in house
- Maximo was considered capable of delivering a satisfactory system
- Customisation of Work Order Tracking with new application



Project: *	<input type="text" value="01/012"/>	* <input type="text" value="Replace NW and NE sewer and water stacks"/>	Work Order: *	<input type="text" value="200647"/>
Location:	<input type="text" value="139"/>	<input type="text" value="Reid Library"/>	Status: *	<input type="text" value="COMP"/>
Department:	<input type="text" value="98430"/>	<input type="text" value="CBU Building Maintenance"/>	Project Type:	<input type="text" value="HAS"/>
FM Section:	<input type="text" value="OM"/>		Registered Date:	<input type="text" value="01/12/2006 13:33"/>
Project Priority:	<input type="text" value="MH"/>	<input type="text" value="Medium to High"/>	Project Administrator:	<input type="text" value="S-COOKS"/>

Scheduling Information

	Start	Finish
Target:	<input type="text" value="01/01/2010 00:00"/>	<input type="text"/>
Scheduled: *	<input type="text"/>	<input type="text"/>
Adjusted:	<input type="text"/>	<input type="text"/>
Actual:	<input type="text" value="13/01/2010 10:35"/>	<input type="text" value="25/03/2011 14:19"/>
Approved Schedule Variation:	<input type="text"/>	
Approved Stage:	<input type="text"/>	
Latest Phase/Stage Started:	<input type="text"/>	
Percent Complete: *	<input type="text"/>	

Note: * indicates that field is displayed in Project Timeline and Progress Report.

Cost Information

GL Account:	<input type="text" value="98430-691-11-999-999-11117055"/>
Estimated Total Commitment: *	<input type="text"/>
Expenditure To Date: *	<input type="text" value="15,704.75"/>
Approved Cost Variation:	<input type="text"/>
Estimated Cost to Complete:	<input type="text" value="-15,704.75"/>

Backlog Project

Equipment:	<input type="text" value="139-D2031"/>	<input type="text" value="Waste Piping"/>
Work Type:	<input type="text" value="BP"/>	
Risk Consequence:	<input type="text" value="3"/>	<input type="text" value="Moderate"/>
Risk Likelihood:	<input type="text" value="D"/>	<input type="text" value="Likely"/>
Funding Type:	<input type="text" value="BM"/>	<input type="text" value="Backlog Maintenance"/>

Action

Priority Project?:

Modified

By:
Date:



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Lack of User Acceptance

- Project Management system too complicated
- Lack of user buy in
- Minimum amount of data stored to satisfy financial requirements
- Reports not used to maximise efficiency of system
- New application tolerated but not embraced



Contract Register Application

- Custom application designed in Maximo 4.1
- Used for storing data relating to major contracts
- No links to any other table in Maximo
- Re-designed in version 5.2
- Extra capacity for storing more information
- More reports created to help manage Contracts
- Links to the Project Management System



Project Number: Project Leader: *

TRIM File Title: **Riley Centre Building Works (UniClub)** TRIM File Number: TRIM Vol Number:

Contract No: * Parent Contract:

Contract Type: Status: Status Review Date: External?

FM Section: Work Order Number: PO Number:

Vendor Details

Vendor:

Address:

Contact: Phone: Fax:

Inducted Date: Bank Name:

BG Amount 1: Est. Release Date: Date Released:

BG Certificate: Issue Date: Expiry Date:

BG Amount 2: Est. Release Date: Date Released:

BG Certificate: Issue Date: Expiry Date:

Vendor Insurance Details

	Sum Insured	Policy Number
Public Liability:	<input type="text" value="50,000,000.00"/>	<input type="text" value="624002897 MUL"/>
Expiry Date:	<input type="text" value="30/06/2011"/>	
Workers Comp:		<input type="text" value="624002727GWC"/>
Expiry Date:	<input type="text" value="30/06/2012"/>	
Prof Indemnity:	<input type="text" value="20,000,000.00"/>	<input type="text" value="PLMESPC06501281"/>
Expiry Date:	<input type="text" value="30/06/2011"/>	

Cost/Schedule

	Original	Adjusted
Orig Cont Sum:	<input type="text" value="14,766,595.00"/>	
Adj Cont Sum:	<input type="text" value="14,766,595.00"/>	
Date Of Com:	<input type="text"/> <input type="button" value="📅"/>	
Date of Site Pos:	<input type="text"/> <input type="button" value="📅"/>	<input type="text"/>
Date For Prac Comp:	<input type="text"/> <input type="button" value="📅"/>	<input type="text"/>
Date For Fin Comp:	<input type="text" value="25/03/2011"/> <input type="button" value="📅"/>	<input type="text"/>
Orig Cont Period:	<input type="text"/> weeks <input type="text"/> days	
Adj Cont Period:	<input type="text"/> weeks <input type="text"/> days	

Modified

By:

Date:

Upgrade to Maximo 7.1.1.6

- Upgrade of Maximo version 7.1 was commenced in March 2010
- Business procedures defined and documented
- Project Management and Contract systems reviewed
- Service Desk application reviewed
- Workflows considered and tested



Project Management System Dropped

- The custom application for Project Management was dropped for the upgrade to 7.1
- All Project data was in the Work Order table
- Work Order Tracking screen was customised
- Using the flexibility of the new Maximo Application Designer made the job easier



Work Order	269633	Test of Project Work Orders Master	FM Section	PD	Attachments
Location	101	Winthrop Hall	Class	WORKORDER	Priority
Asset			Work Type*	MW	Status
GL Account	98420-139-63-999-999-63025000		Failure Class		Status Date
Project Number	11/269633		Problem Code		Is Task?
Project Master	VO?		Business Unit	98420	Under Flow Control?
Parent WO			Dept Order Number		Suspend Flow Control?
Has Children?	<input type="checkbox"/>		Rechargeable Job?	<input type="checkbox"/>	Flow Action
Actual Cost/Charged Cost	117,000.00	117,000.00	Charge weekly field?	<input checked="" type="checkbox"/>	Flow Action Assist?

Job Details Asset Details

Job Plan		Warranties Exist?	<input type="checkbox"/>
PM		SLA Applied?	<input type="checkbox"/>
Safety Plan			

Multiple Assets, Locations and CIs Download

Scheduling Information Follow-up Work

Target Start		Actual Start	10/05/11 08:22	Originating Record	
Target Finish		Actual Finish	10/05/11 11:58	Originating Record Class	
Scheduled Start	1/06/11 14:59	Duration*	0:00	Has Follow-up Work?	<input type="checkbox"/>
Scheduled Finish	31/08/11 15:00	Time Remaining		Interruptible?	<input type="checkbox"/>
Predecessors					

Responsibility

Reported By	HACKINGP	Supervisor*	DAVIESR	Modified By	PHACKING
Reported Date	9/05/11 11:14	Lead Craft*	PROJM	Changed Date	16/06/11 08:38
On Behalf Of		Vendor			
Phone		Owner			
Email Address		Owner Group			



Work Order	269633	Test of Project Work Orders Master	FM Section	PD	Attachments	
Location	101	Winthrop Hall	Class	WORKORDER	Priority	4
Asset			Work Type*	MW	Status	COMP
GL Account	98420-139-63-999-999-63025000		Failure Class		Status Date	10/05/11 11:58
Project Number	11/269633		Problem Code		Is Task?	<input type="checkbox"/>
Project Master WO?	<input checked="" type="checkbox"/>		Business Unit	98420	Under Flow Control?	<input type="checkbox"/>
Parent WO			Dept Order Number		Suspend Flow Control?	<input type="checkbox"/>
Has Children?	<input type="checkbox"/>		Rechargeable Job?	<input type="checkbox"/>	Flow Action	
Actual Cost/Charged Cost	117,000.00	117,000.00	Charge weekly field?	<input checked="" type="checkbox"/>	Flow Action Assist?	<input type="checkbox"/>

Project Details

Current stage	Business Case	Stage	Expenditure to Date	Project Administrator	DAVIESR
Registered Date	9/05/11 11:14		Approved Cost Variation	Approved Sched Variation	
Project Type	MIN	Minor Works	Estimated Cost to Complete	Percent Complete	
Project priority	LM	Low to Medium	Estimated Total Commitment	Priority Project??	<input type="checkbox"/>

Job Details

Asset Details

Backlog Project

Job Plan		Warranties Exist?	<input type="checkbox"/>	Risk Consequence	
PM		SLA Applied?	<input type="checkbox"/>	Risk Likelihood	
Safety Plan				Funding Type	

Scheduling Information

Follow-up Work

Target Start		Actual Start	10/05/11 08:22	Originating Record	
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Scheduled Finish	31/08/11 15:00	Time Remaining		Interruptible?	<input type="checkbox"/>
Predecessors					



Projects in Work Order Tracking

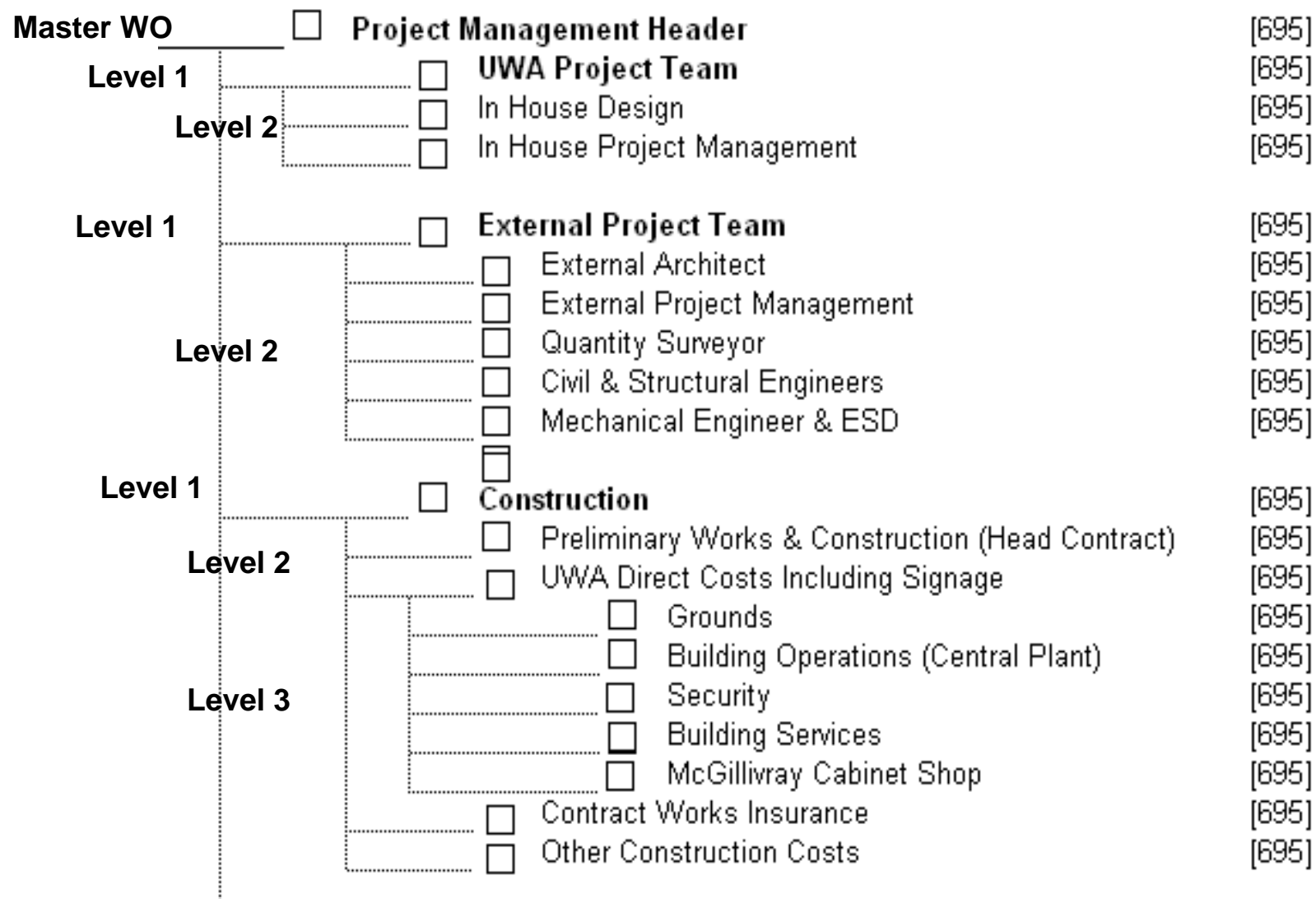
- The top level of the Project hierarchy has the Project master WO checked
- This allows for the entry of Project related information
- The Project number is the Master WO Number with a year prefix
- The Project number is applied to all Work Orders associated with the Project



Preventative Maintenance Template

- Templates have been created in Preventative Maintenance to provide a Project Template
- This creates a standard Hierarchy of Work Orders
- Details are entered as necessary
- Unnecessary Work Orders are Cancelled
- Project Number entered on every Work Order





Find: Select Action

- List
- Work Order
- Plans
- Related Records
- Actuals
- Safety Plan
- Log
- Failure Reporting
- Specifications

Advanced Search Save Query Bookmarks

Work Orders Filter 1 - 4 of 4 Download

Work Order	Description	Section Code Prefix	Location	Asset	Status	Scheduled Start	Priority	History	Project Number
273157	Project Master Work Order	IT	101		APPR		4	N	11/273157
273158	UWA Project Team	IT	101		APPR		4		11/273157
273159	In House Design	IT	101		APPR		4		11/273157
273160	In House Project Management	IT	101		APPR		4		11/273157

Select Records

Purchase Contract Application

- Purchase Contracts closest application to our old Contract Register
- Data imported from our old application
- Application kept as vanilla as possible
- Bank Guarantees added to new Tab and increased to three
- Improved efficiency because POs can be raised from the Contract



Without Work Flows

- Didn't have Work Flows implemented in earlier versions
- Emails to inform Clients were set up by schedule and only sent twice a day
- Reliant on emails or phone calls for actions on Maximo records
- Supervisors reliant on Saved Queries for scheduling work



Work Flows Implemented in 7.1

- Work Flows created during the upgrade
- Work Flow creation easy and very flexible
- Supervisors have their assignments in their Start Centres
- Clients are notified by email immediately there is a status change
- Authorised users see pending records on log in



Improved Efficiency

- Work Flows have reduced the need to chase people for authorisation of records
- Escalations allow for absent staff
- Pending records are displayed in personal Start Centres
- Records can be assigned to individuals or groups



Procurement Process

- UWA are undergoing a transformation of procurement processes
- Purchase Requisitions used instead of POs
- Work Flows assist in the processing path of the whole process
- Can be applied to all applications in Maximo

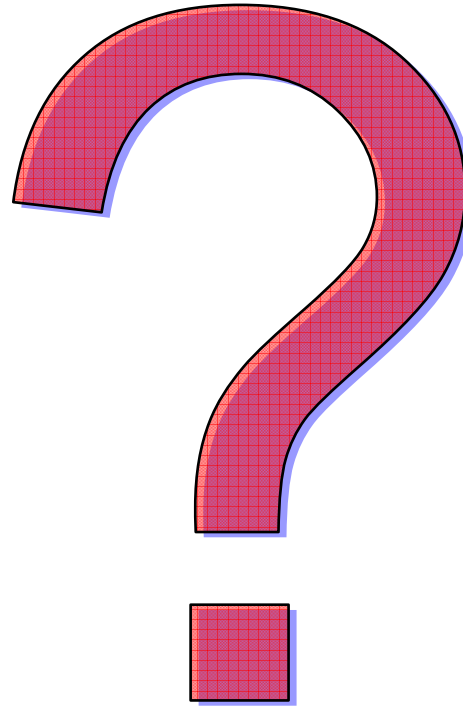


In Conclusion

- UWA upgraded to version 7.1.1.6 in 2010/11
- In house Contract app dropped in favour of Maximo Purchase Contracts
- In house Project Management app dropped in favour of using Work Orders
- Work Flows created to assist with processing records and to improve efficiency of approval processes



Questions



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