

A Renewed Approach to Work Management

Pulse2012

Meet the Experts. Optimise your infrastructure.

May 31 - June1

Sheraton on the Park Hotel, Sydney



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Agenda

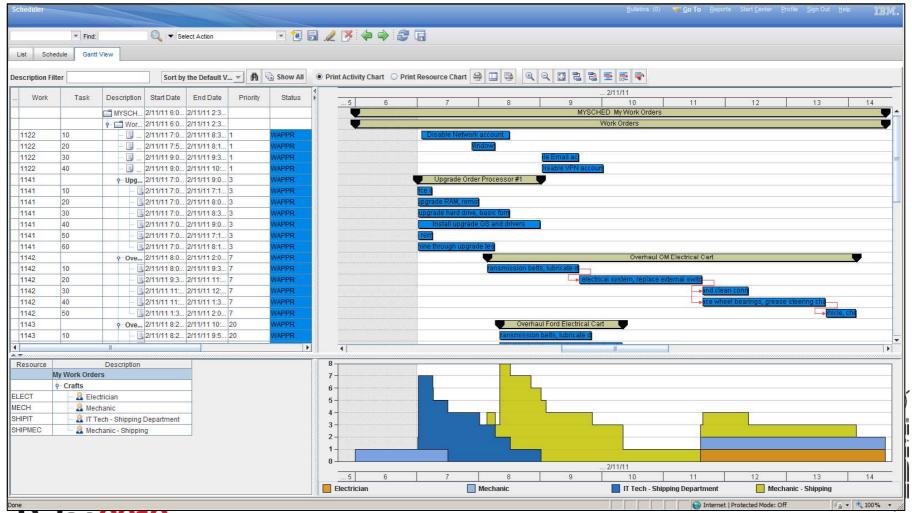
- How has Maximo Scheduler evolved?
- Our Renewed approach toward Work Management
- New Features and Enhancements Advanced Scheduling & Workforce Management:
 - Scheduler
 - The new Graphical Assignment application
 - Dispatching, Maps and Service Addresses
 - Maximo Everyplace templates
- Supporting Enhancements in Maximo fix-pack 7.5.0.3





What is Maximo Scheduler?

A Maximo add-on application that facilitates the scheduling of work orders, tasks, and PM forecasts graphically in a Gantt view



Maximo Scheduler to Date

Scheduler 7.1

Gantt View to visualize work orders and tasks

- Drag & drop work orders & tasks
- Manage dependencies
- Perform CPM
- View resource load and availability
- What If analysis

Work Orders

- Date constraints
- Task dependencies

Scheduler 7.1.1, 7.5

Gantt View to visualize PM forecasts

- View and manage future PMs and Work Orders
- View resource load and availability for both future PMs and Work Orders

Work Orders

- Bulk Reschedule
- Assignment Manager tab in Work Order application

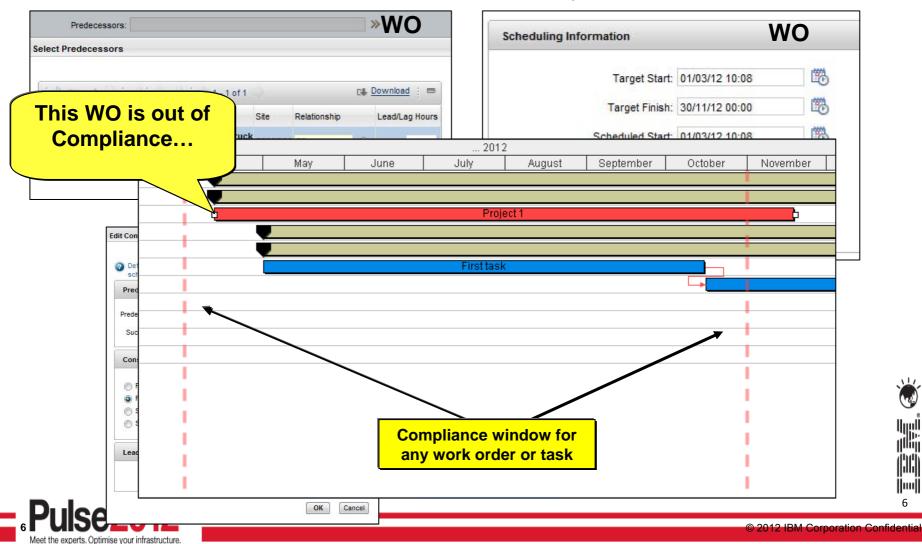
3Q,2009

1Q,2010, 2Q 2011



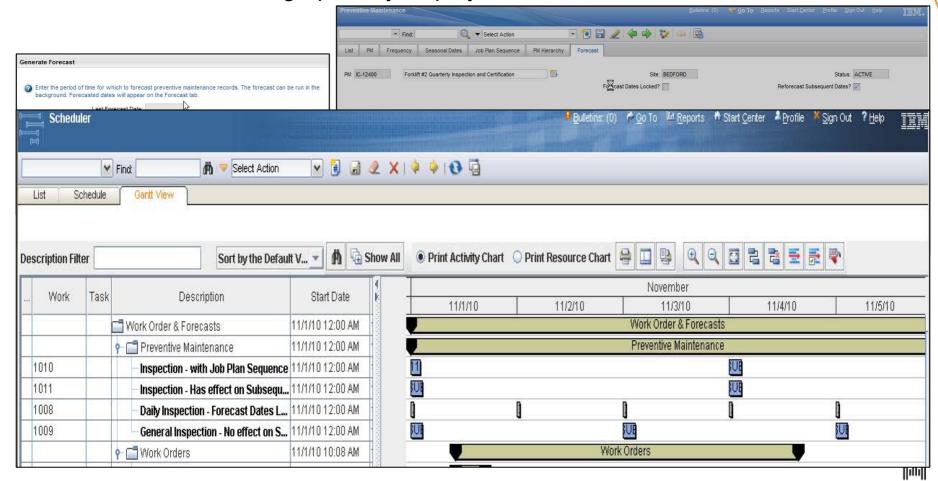
Precedence Logic and Activity Constraints

- Precedence logic added between work orders/tasks that have the same parent
- SNE/FNL date constraints calculated automatically from JP/PM offsets



PM Forecasting

- Generate forecast dates, change/move dates and allow Maximo to use these forecast dates when generating PM based work orders.
- PM Forecast dates are graphically displayed in the same row on the Gantt chart.





Our Continued Focus on Work Management





Maximo Scheduler 7.5.1

 Focus : Advanced Planning & Scheduling, Workforce and Resource Optimization

Scheduler 7.1

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Work Orders

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Work Orders

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Scheduler 7.5.1

Gantt View displays additional Resources

- Materials/Tools/Asset
- Graphical Labor Assignments
- Resource Leveling CPM or Manual
- Perform Actions from Gantt

Work Orders

- Dispatching
- Public Map API

3Q,2009

1Q,2010, 2Q 2011

2Q,2012



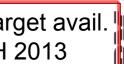
Work Management Plan Forward

Investing in the natural evolution of our current products in a direction desired by our customers

- Enhancements to Scheduler (Maximo Scheduler 7.5.1)
 - Graphical Assignment/Dispatching
 - Provision of standard Work Order actions
 - Additional Resources and their availability
 - Assets/Locations
 - Labor
 - Tools
 - Materials
 - Schedule Compliance
- Enhancements to Maximo (7.5.0.3 function in a fix pack)
 - Service Addresses
 - Public Map UI Control
 - Crews
- Maximo Everyplace role based templates
- Optimization (iLOG Optimization tools)

All functional capabilities enabled with Maximo Scheduler 7.5.1

Target avail. 1H 2013





Our Work Management Focus Areas

Capacity Planning

Resource Optimization

Assignment

Dispatching

Real-time Communication

Forecast Work

Identify Resource Gaps

Availability:

- Assets
- Location
- Material
- Tools
- · Labor/Crews

Resource Leveling

Graphical UI

Labor and Crews

Automated

Graphical UI

Public Map Control

Route Optimization

Labor and Crews

Automated

Assign Emergency Work

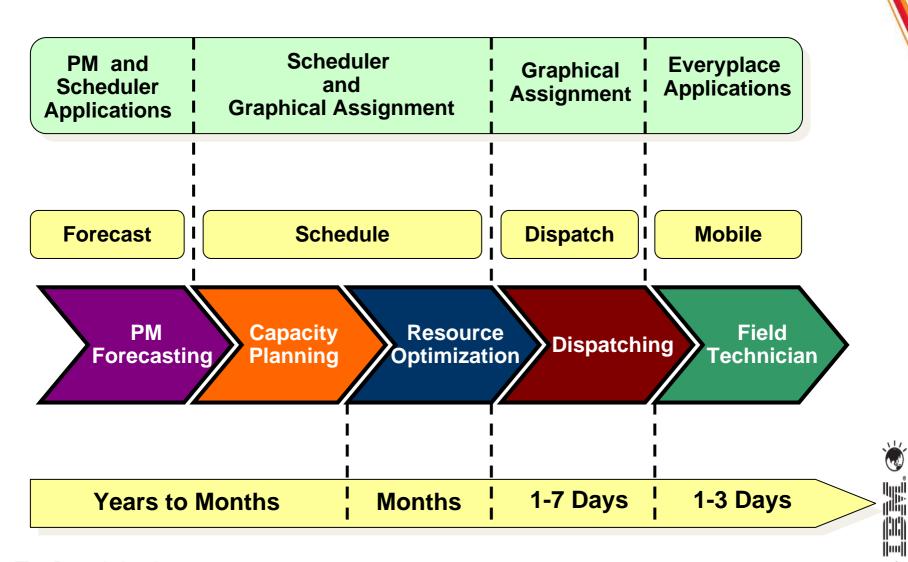
Communication
To Field
Technicians

Schedule Compliance





Time Phased Functional Utilization





The logical work management hand-offs

Scheduler

Schedule Created

Project, demand, & forecasted work Graphical Assignment

Assignments made

Crafts & skills validated

Absences & vacation respected

Dispatching

Assigned routes visible & editable on a map

New work may easily be assigned based on proximity of labor Maximo Everyplace

Field tech sees assigned route on a map

See locations of neighboring crews

Feedback on work status & progress





Roles Involved in Managing the Schedule

Scheduler/Planner



- Defines and adjusts labor/crew availability along with resource leveling
- Capacity Planning
- Assigns work orders to resources
- Continuously optimizes the schedule as the operational environment changes
- Sequence and route work assignments based on geography

Dispatcher



- Monitor field resources and work order progress and status
- Monitor the location of field resources compared to open orders
- Enter status and complete work orders on behalf of technicians who don't have mobile devices
- Sequence and route ongoing work assignments based on geography and optimization

Field Technician



- Supervisor approves and assigns work on mobile devices
- Receive work orders in the field and provide real time status updates to dispatch
- Complete, edit and approve work orders on mobile devices along with viewing work on a map with optimal driving directions
- Notify dispatch of potentially dangerous situations, incomplete work



Contributors to our approach:

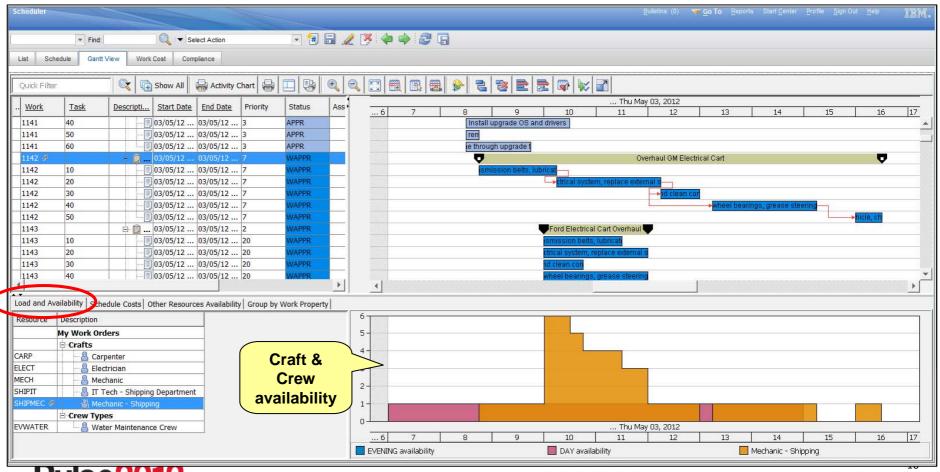
Maximo Scheduler



Load and Availability

Additional resource types provide a more complete and accurate vision of factors critical to proper planning & scheduling

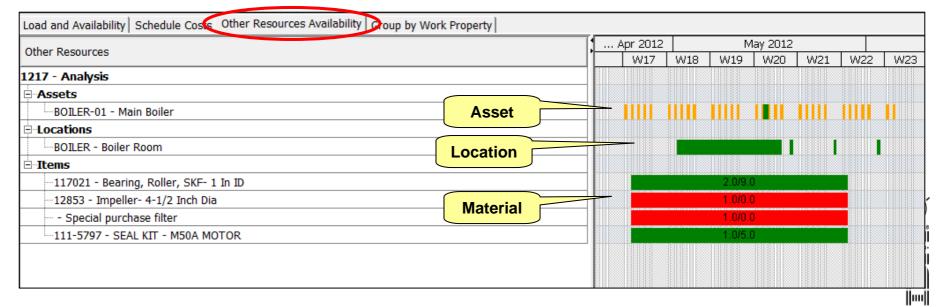
Can now see Labor/Crew, Asset/Location, Tool and Material availability



Asset, Location & Material Availability

Other Resource Availability tab shows:

- Maintenance/Operational/Calendar availability of Asset and Location
- Planner knows when an Asset or Location is (or is not) available for work
- Calendar may be imported from an external system (i.e. Production system)
- Material Availability for planned materials
 - · Shows required quantity vs. available quantity
 - Eliminates planning work to be done when critical materials are unavailable
 - Trades can be advised via email to pick up materials from an alternate storeroom





Usability Improvements - Additional Actions and Tool Bar Buttons

Work Order Actions

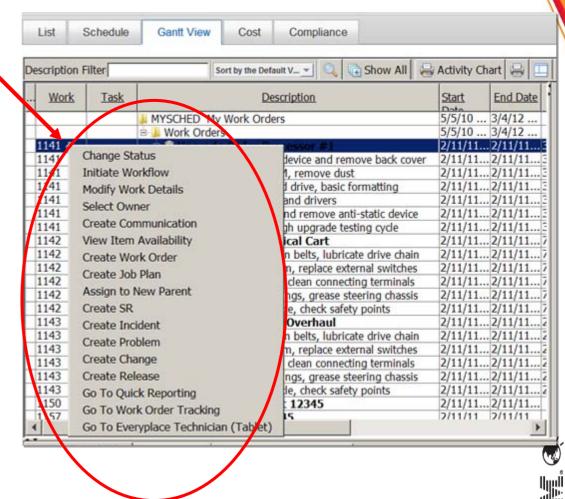
 Keep the user from having to always navigate away from the Scheduler Gantt view

Additional Toolbar Buttons

 Make routine changes and adjustments simple for the planner



- Zoom to Week
- Go To Day
- Constrain horizontal scrolling to the date range containing work
- Filter resources based on selected work orders
- Show/Hide Compliance
- Full Screen



||1111|

Resource Leveling & Optimization



Support for various optimization models (<u>target 1H 2013</u>) iLog CPLEX engine will be included with Maximo Scheduler

- Input
- Flexible resource combinations
- Priorities: Asset, Work , Location, Material, Tools
- Resource availability
- Output
 - Optimal work schedule based on:
 - Resource availability
 - SLA's
 - Time constraint
 - And other user defined objectives such as minimize cost, schedule emergency work
 first, etc.



Typical Maximo Scheduler Use Case with Optimization

Maximo Scheduler is typically used to address:

Capacity Planning

- <u>Identify craft and skill requirements</u> for a set of work orders that need to be completed within certain constraints
- <u>Compare the requirements</u> against availability Asset, Location, Materials, Tools, as well as Resources (Labor and Crews) and <u>identify the gaps</u>

• Resource Leveling

- Schedule work orders automatically based on current availability of crafts and skills.
 - Flexible resource combinations

Assignment

- Automatically assign work orders to individuals after taking into account skill requirements, the current labor load and the availability.
- In the case of mobile crew, <u>optimize the assignment</u> based on customer defined parameters and priorities
- Automate Route optimization

Emergency Work Management

Dynamically assign emergency work to crew and reassign/reschedule affected work orders



Contributors to our approach:

Graphical Assignment

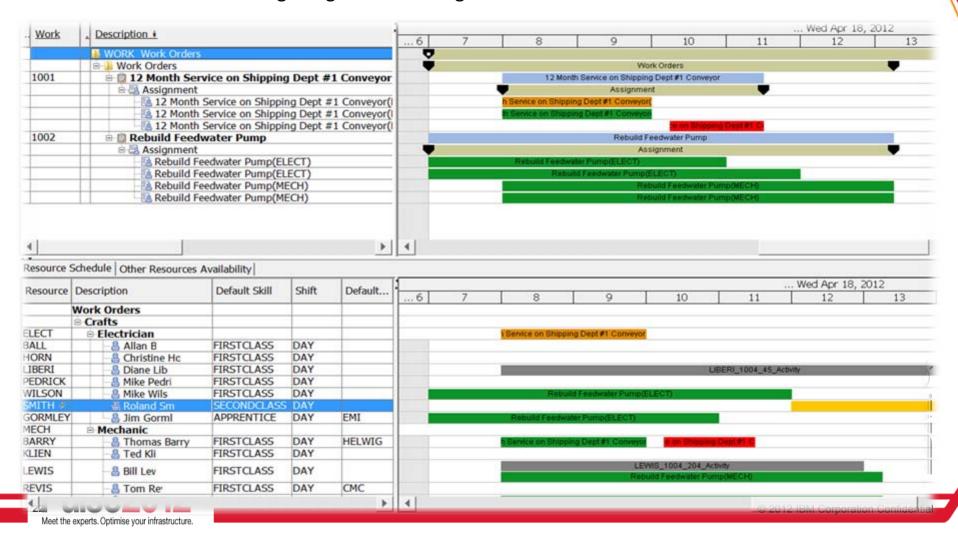




New Graphical Assignment Application

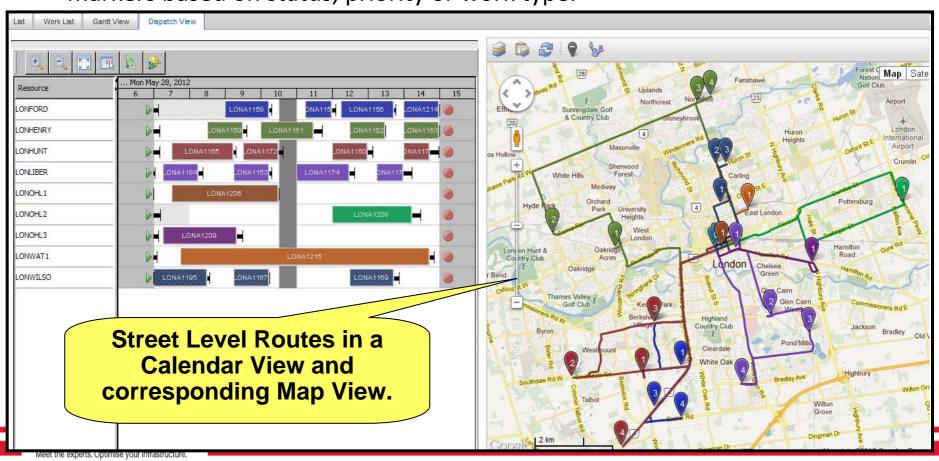
Application aimed at easing the process of assigning work to people

- Graphical Assignment UI is the same as Scheduler to further facilitate the logical "hand-off" of schedule to where assignments are made
- Assignments are easily made via Drag & Drop with resulting color changes indicating a change of status from Waiting Assignment to Assigned

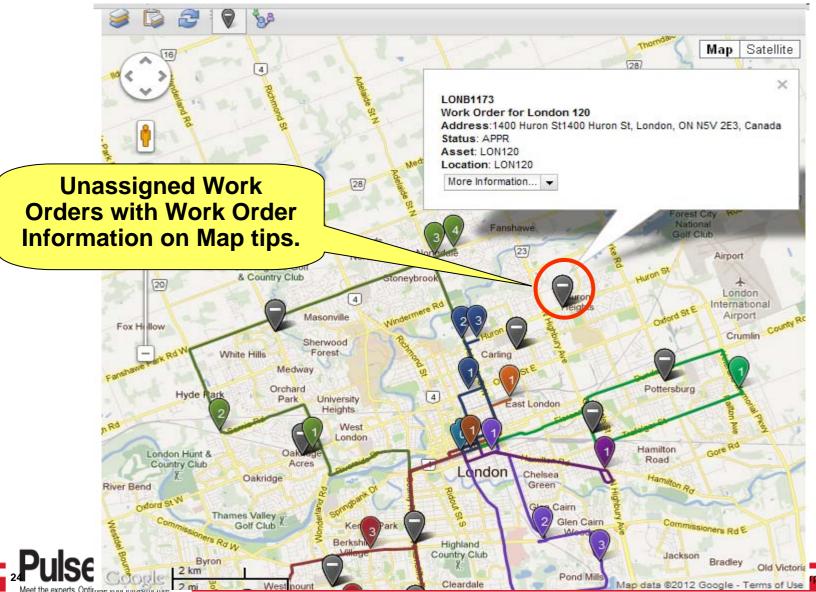


Dispatch Tab – Display Street Level Routes

- •
- Once Routes are created, click on the Dispatch Tab.
- Dispatch View displays Routes in a Calendar and Map View
- Calendar View gives you the ability to Filter, Drag & Drop Assignments, Delete Assignments, Split Assignments
- Map View View Nearby Labor & Crews, View Unassigned WOs, View WO
 markers based on status, priority or work type.



Dispatch View – Unassigned WOs



GPS Tracking

Identify a Location Based Service (LBS) Interval to capture

Longitude, Latitude, Altitude, Accuracy, Altitude Accuracy, Heading, Speed

Labor:



Crews:



Markers are color coded to display how current the LBS is.



Red last location accuracy is over the limit (configurable).

Yellow outside 30 mins of the LBS interval



Blue within 30 mins of the LBS interval (configurable)



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Contributors to our approach:

Maximo Everyplace





IBM Maximo Everyplace

Allows users to access any existing IBM Maximo application on an iPhone, iPad, iPod touch, Android, Blackberry, or other supported device without installing anything on those devices



Maximo Everyplace enables users to:

- Shorten the lag time between an event's occurrence and the recording of that event in the system. There's no need to wait until they get back to their desk to enter or retrieve data.
- Increase accuracy of data in the system by allowing them to enter information while it's fresh in their minds.
- Offer convenient, targeted access to Maximo for workers who don't regularly sit at a desk or use a desktop computer.





New Field Technicians Everyplace Templates



Developed new mobile applications for the field technician

- Leverage existing Maximo Everyplace product
 - Ability to tailor the application with Application Designer tool
- New templates designed for the field technician
 - View current and sequenced assignments for themselves or their crew
 - Obtain directions where required
- View and feedback on work order details
 - Configurable content
- Dynamic updates of sequenced work reflecting newer higher priority work, reassignments, emergencies
- Application for Supervisor, and Technician (Lite, Phone and Tablet versions)

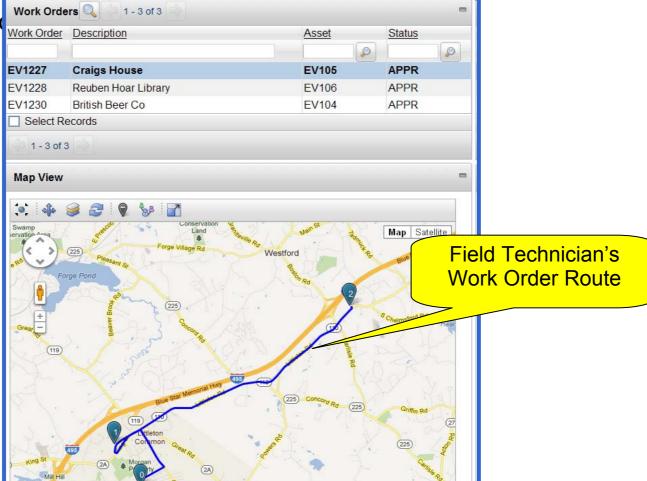




MX Everyplace Field Technician Application – Tablet

 Create a Work Order Query that will capture the WOs assigned to labor/crew for the day.

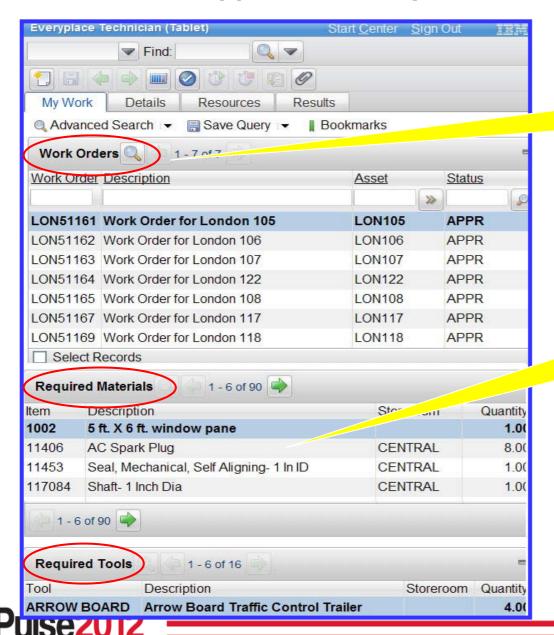
Map is based







Field Technician Application – My Work



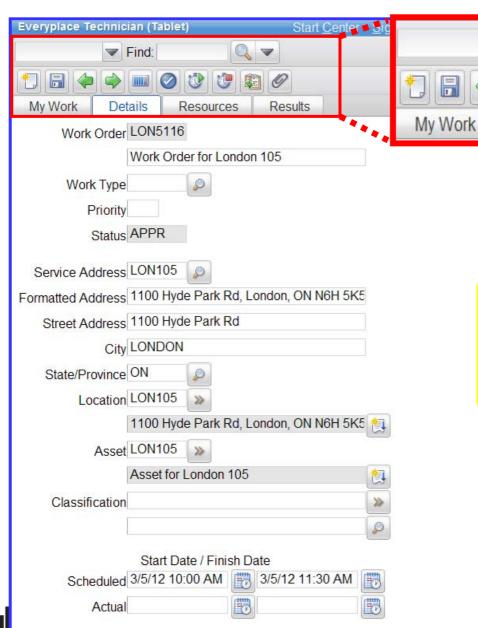
Meet the experts. Optimise your infrastructure.

Street Level Route of Work Orders for the day.

List of Required Material and Tools to do the work for the day.



Field Technician Application – Details





Find:

Details

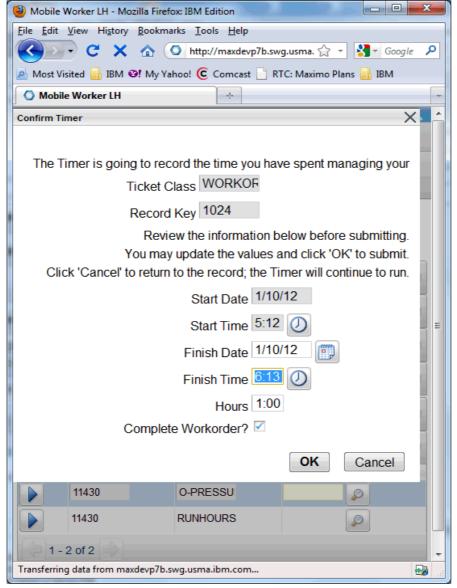
- Query Tools
- New / Follow-up Work Order

Resources

Results

- Status Change
- Stop / Start Timers
- Attach Documents

Field Technician Application – Time Reporting







New functions in Maximo 7.5.0.3





Maximo 7.5.0.3 - Service Address Application

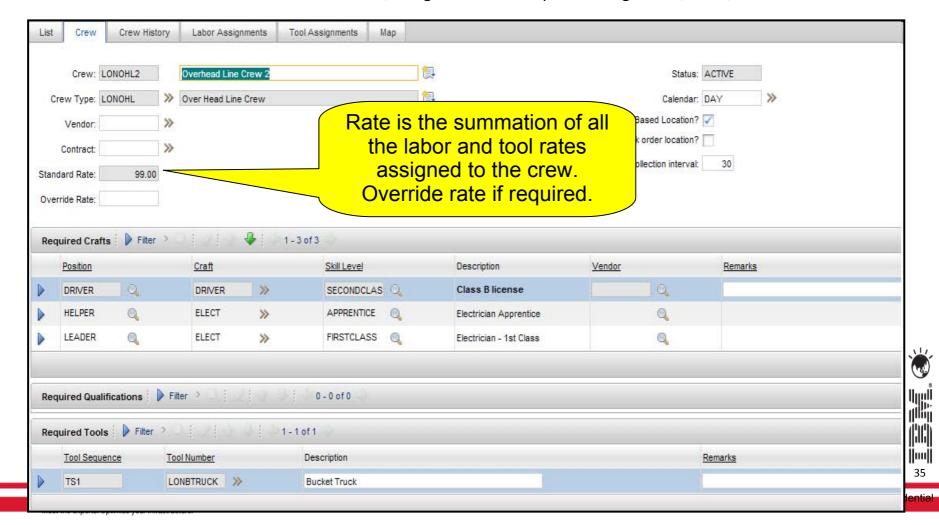
- Available in Locations, Assets, Service Requests, Incidents, Problems, Work Order Tracking, Activities and Tasks, Changes and Releases.
- Service Addresses moved from Service Provider and Utilities to core Maximo

List Address Map			
Address Code: LON100	300 Commissioners Rd W, London, ON N6.	1 1Y3, Canada	Organization: EAGLENA Site:
Address Information			
Formatted Address:	300 Commissioners Rd W, London, ON N6J 1Y3, C	anada	Latitude(Y): 42.9562001000
Street Address:	300 Commissioners Rd W	a	Longitude(X): -81.2749597000
Address Line 2:			Reference Point:
Address Line 3:			Directions:
City:	LONDON		
Region/District:			
County:			
State/Province:	ON Q Ontario	**	Create Service Addresses.
Zip/Postal Code:	N6J 1Y3		Populate Formatted Address
Country:	CA Canada		and Lat/Long field using
GEO Code:			Map Tab.
Time Zone:	Q		

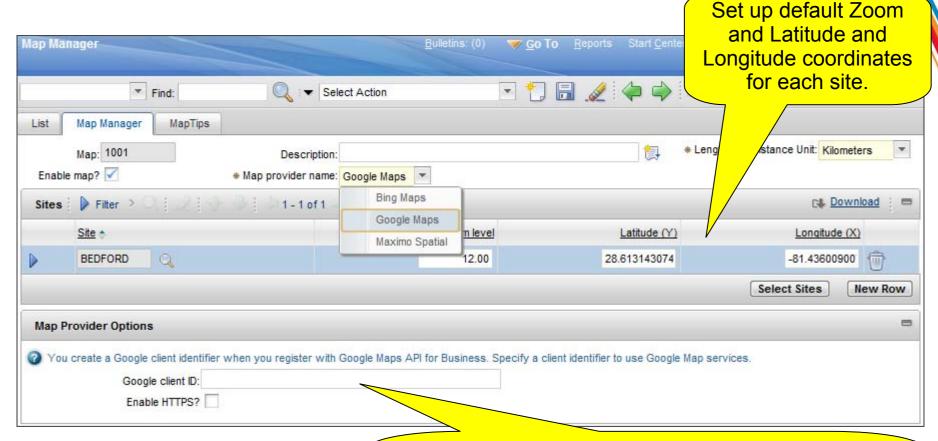
Note: Service Addresses are important for the usage of maps. Mapping utilizes the Latitude (y) and Longitude (x) coordinates.

Maximo 7.5.0.3 – Crew Types/Crew Applications

- Crew Types and Crews moved from Utilities to core Maximo
 - Crews have required craft/skill, qualifications and tools (defined as crew type attributes)
 - Assign labor to crew positions and assign tools to meet the crew requirements
 - A crew history of labor/tool assignments and the work performed is maintained
 - Schedule Crews in Maximo Scheduler, Assign Crews in Graphical Assignment, WOT, Job Plans



Map Manager



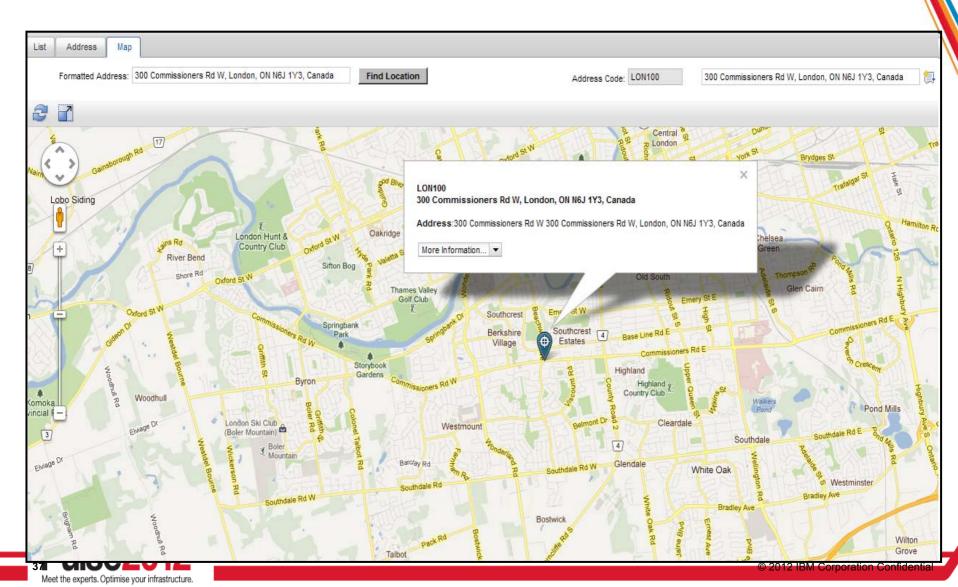
Map Provider License Key is required.

- Google allows so many hits to their site.
- Bing a license is required.
- Will work with Maximo Spatial

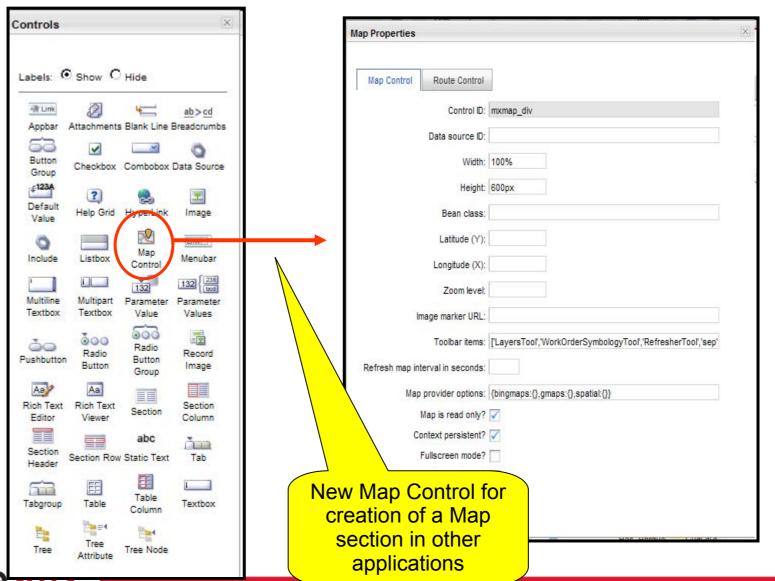


Map Tabs

Available in Service Address, Locations, Assets, Service Requests, Incidents, Problems, Work Order Tracking, Activities and Tasks, Changes and Releases.



Application Designer – Map Control



The Summarized Advanced Scheduling and Workforce Management Vision

- Use Maximo Scheduler to:
 - —Find the optimal time to schedule upcoming work by balancing:
 - Work order and Task relationships and constraints
 - Labor, Asset, Location, Craft, and Material availability
 - Have visibility into schedule compliance
 - –Drag and drop labor assignments (or automate)
- Increase the visibility of resources and crews by:
 - Leverage map UI control for dispatching of incoming work
 - –Monitor progress of existing work
 - –Manipulate crew and resource routes
- Improve efficiency of field technicians
 - -Leveraging map UI control for viewing of route stops
 - -Dynamic work list based on dispatched work and automated optimization
 - -Communication with neighboring resources
 - —Intuitive feedback from mobile applications





Questions







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