



Maximo

It's not just for Maintenance

Presented by Natalie Souness
Asset Management Coordinator Port Taranaki

Natalie Souness

Asset Management System Coordinator Port Taranaki

Project Manager
for Version 7 Upgrade



Agenda

Port Taranaki

- Who is Port Taranaki
- How do they use Maximo

V7 Upgrade

- Maximo for Purchasing
- User Reporting
- Project Scope

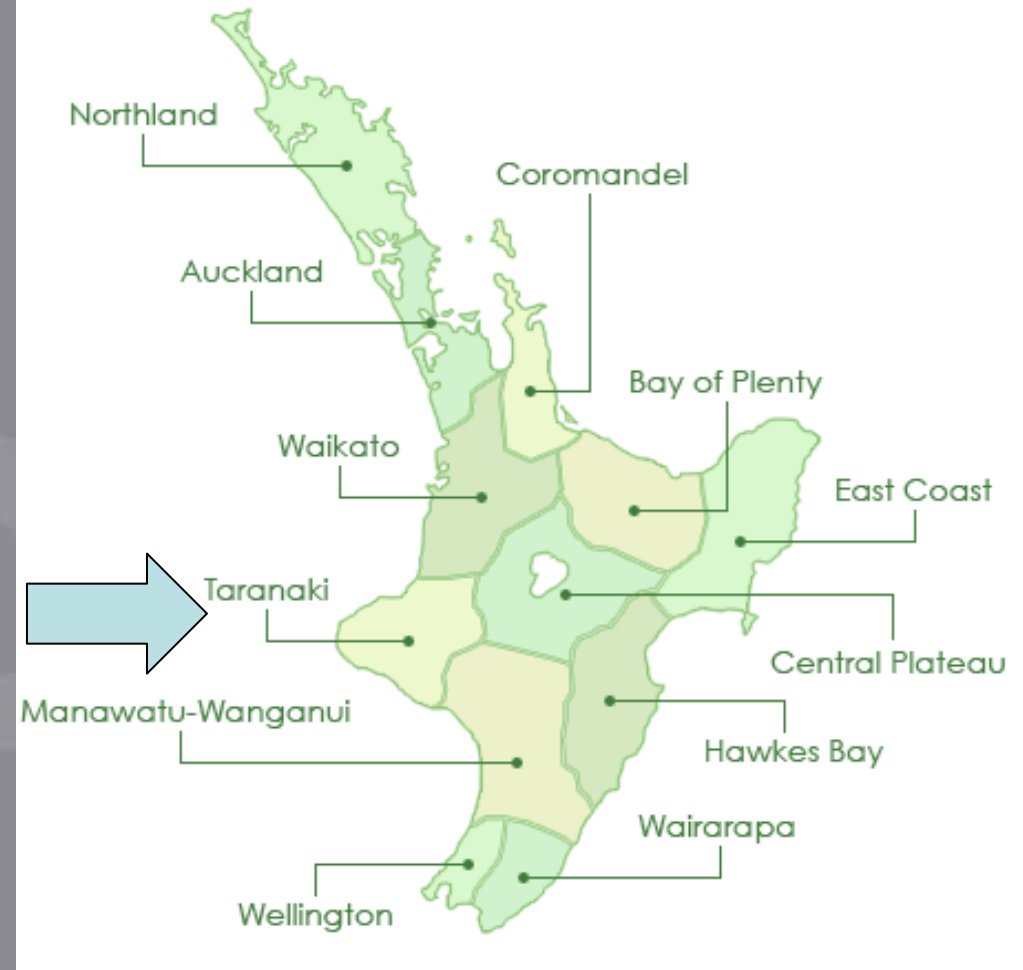
Current Situation

- Work Still in Progress
- Future Plans



Who is Port Taranaki

- Centrally located on the west coast
- Only deep water seaport on the western seaboard



“ Port Taranaki is a key import & export port in NZ ”

Who is Port Taranaki

- The port was established in 1875.
- 9 Berths
- 717 ships last year.
- Over 3.5 million Tonnes of Product last year.



“

***2nd Biggest Export Port in
New Zealand***

”

Who is Port Taranaki

Port Taranaki handles large volumes of international and coastal cargoes

- Farming
- Engineering
- Petrochemical

*The Maximum Port
Draft is 12.5m*



Who is Port Taranaki

Port Taranaki is a servicing base for sea transport and related industries

Provided support for oil exploration since the 1960s.

“Port Taranaki has specialist experience in handling heavy lift and project cargoes”



Who is Port Taranaki

Port Taranaki Employs 127 Full Time Permanent Staff Members

Major Sponsor of the Taranaki Rugby Football Union

Taranaki's first specifically designed 5 Star 'green building'

4 Wharves
9 Berths
3 Tugs
2 Pilot Launches

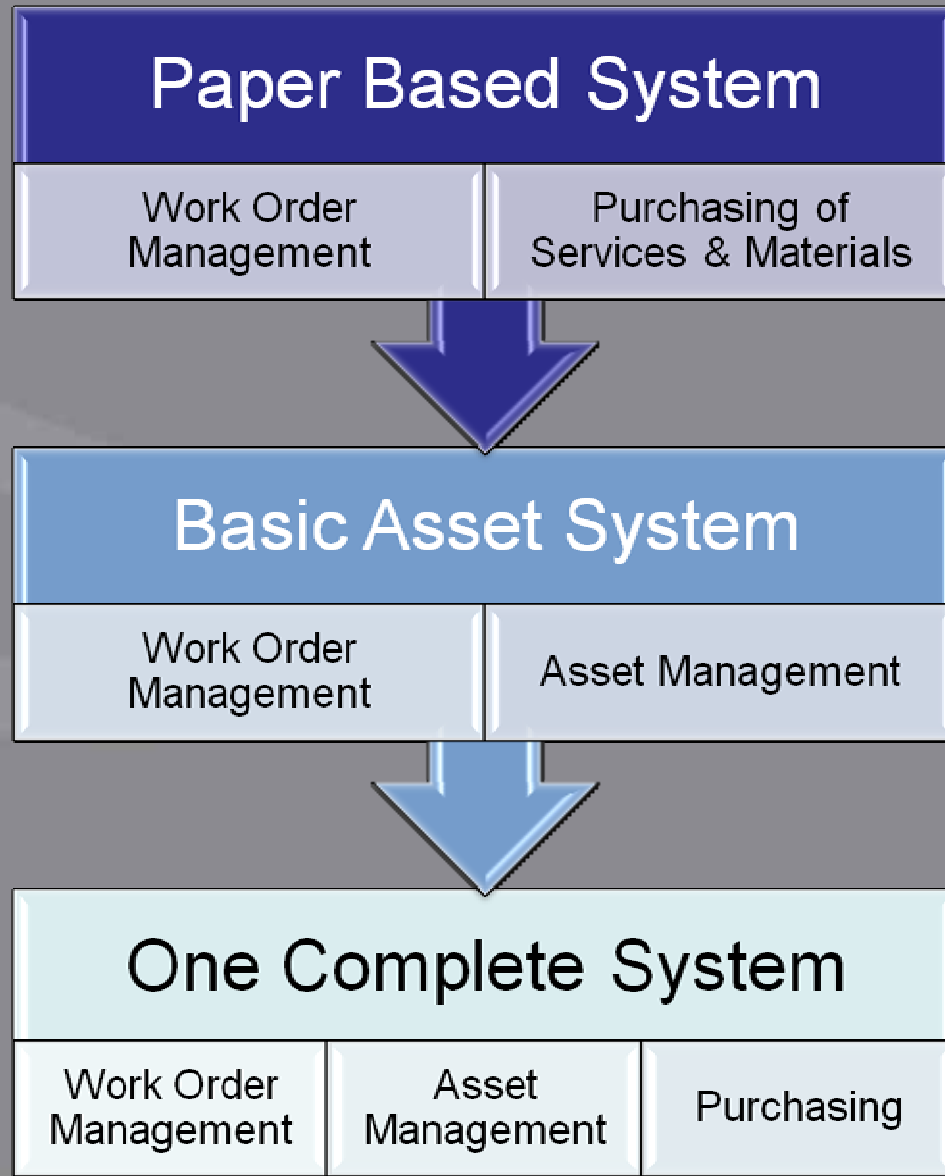


Prior to Maximo

Maintenance Work

- Marine
- Works
- Engineering

Good opportunity to review our entire system and see if we could do things better.





Prior to Maximo most of our systems were paper based



Maximo Configuration

- Inventory
- Invoicing
- Work Order Management
- Purchasing

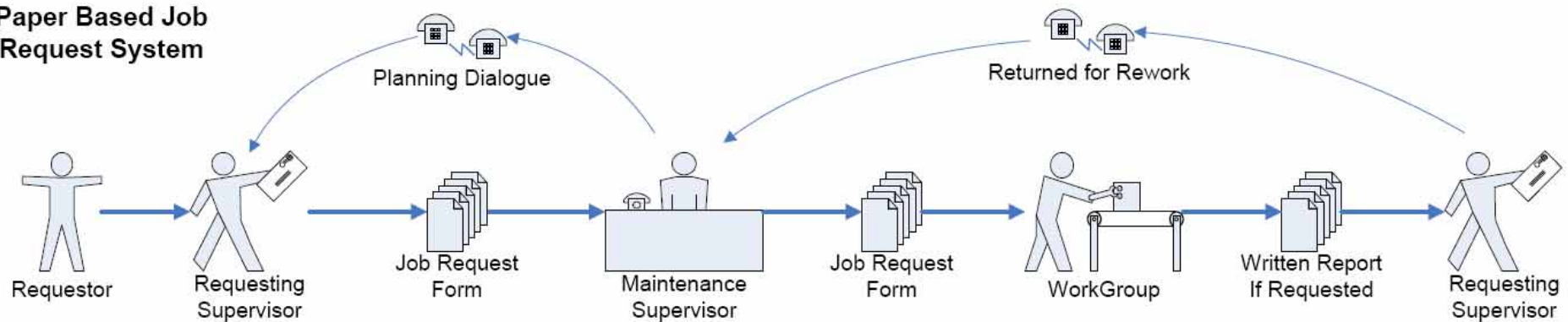


Work Order Management Prior to Maximo

- Preventative Maintenance work was managed through PM Job Cards
- Corrective Maintenance work was undertaken through job request forms

JOB REQUEST / WORK ORDER SYSTEMS

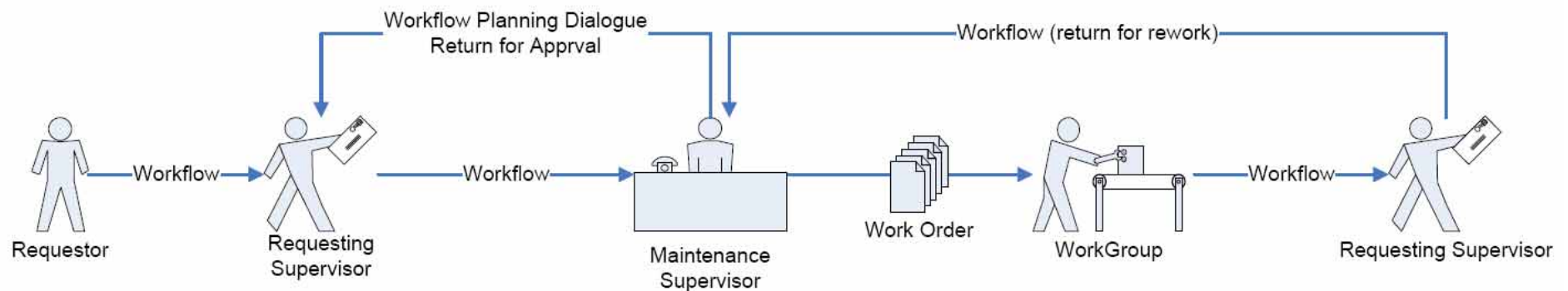
Paper Based Job Request System



Work Order Management in Maximo at Go Live

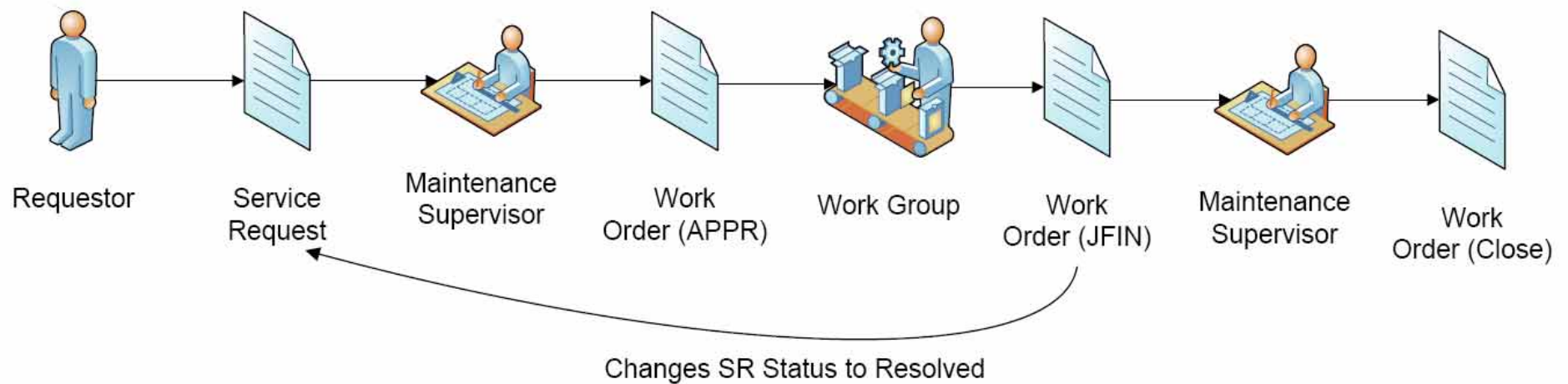
- Preventative Maintenance work was managed through the Preventative Maintenance Module.
- The Corrective Maintenance workflow was modelled on our business practice for requesting jobs

Maximo Work Order System



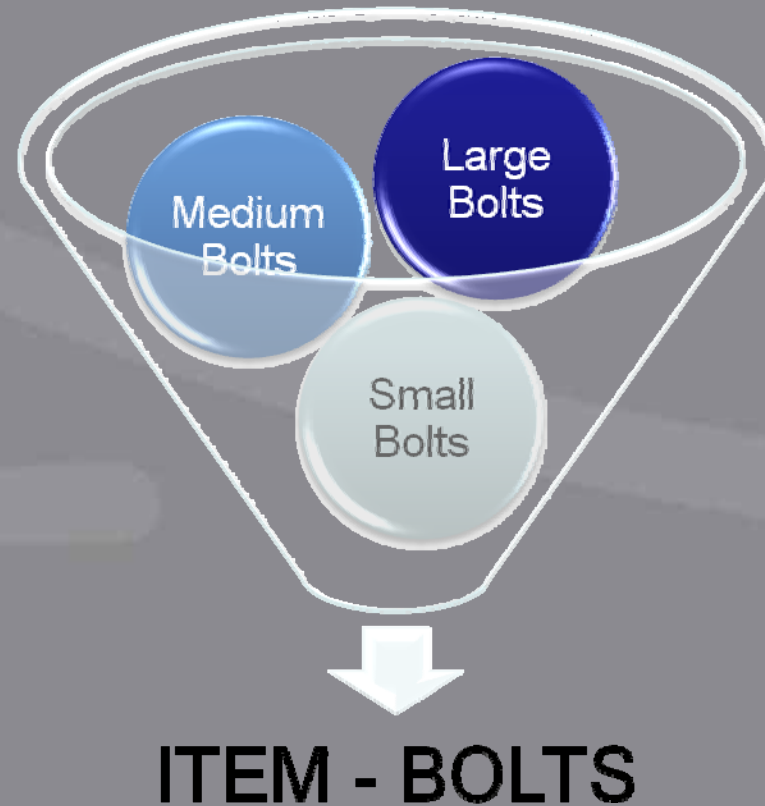
Work Order Management in Maximo Today

- The new process for requesting jobs is simpler.



Inventory Prior to Maximo

- Limited Inventory control
 - Fewer Item numbers
- Work Order Costs
- No Transaction History



Inventory in Maximo

- Unique Item Numbers
- Record on Work Orders
- Multiple Storerooms
- Reporting

Central Stores

Rupe

Tuakana

Kupe

Westgate

Purchasing Prior to Maximo

- Manual Process
 - Items – In Stores
 - Materials – Vendor
 - Service - Vendor
- Purchasing is governed by signing rights – Delegated Financial Authority
- Spreadsheets to create Purchase Orders

Items

- Requested directly to Stores
- Stores would issue items

Materials

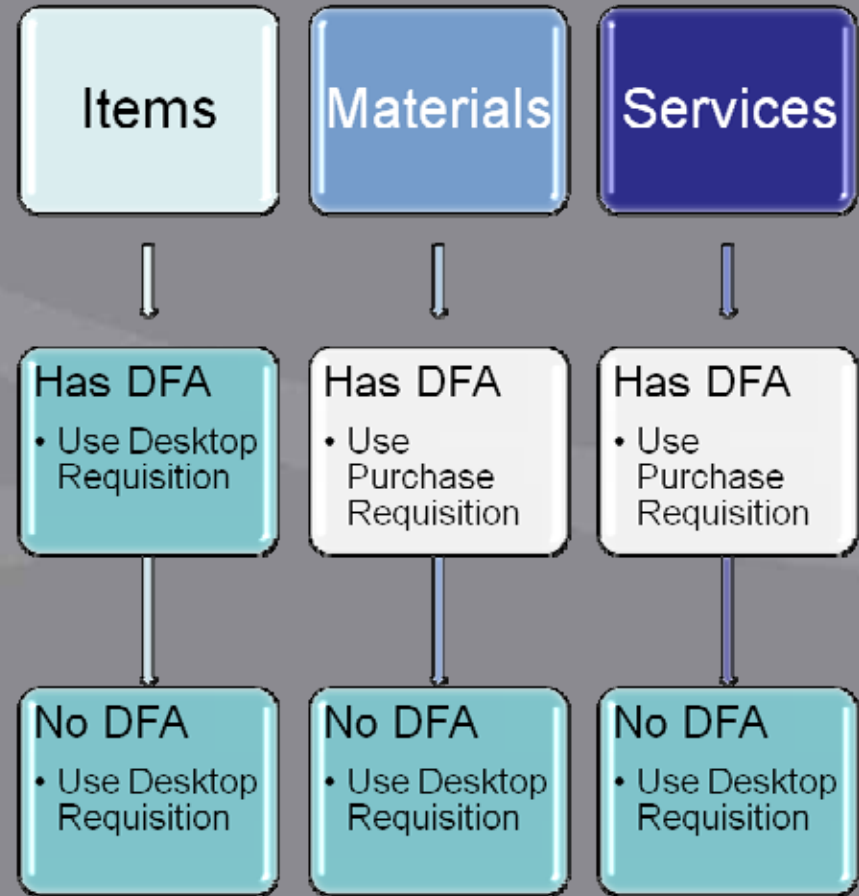
- Raised a Requisition for Stores
- Sent it to Purchasing

Services

- Raised an order for works
- Sent it to accounts to arrange

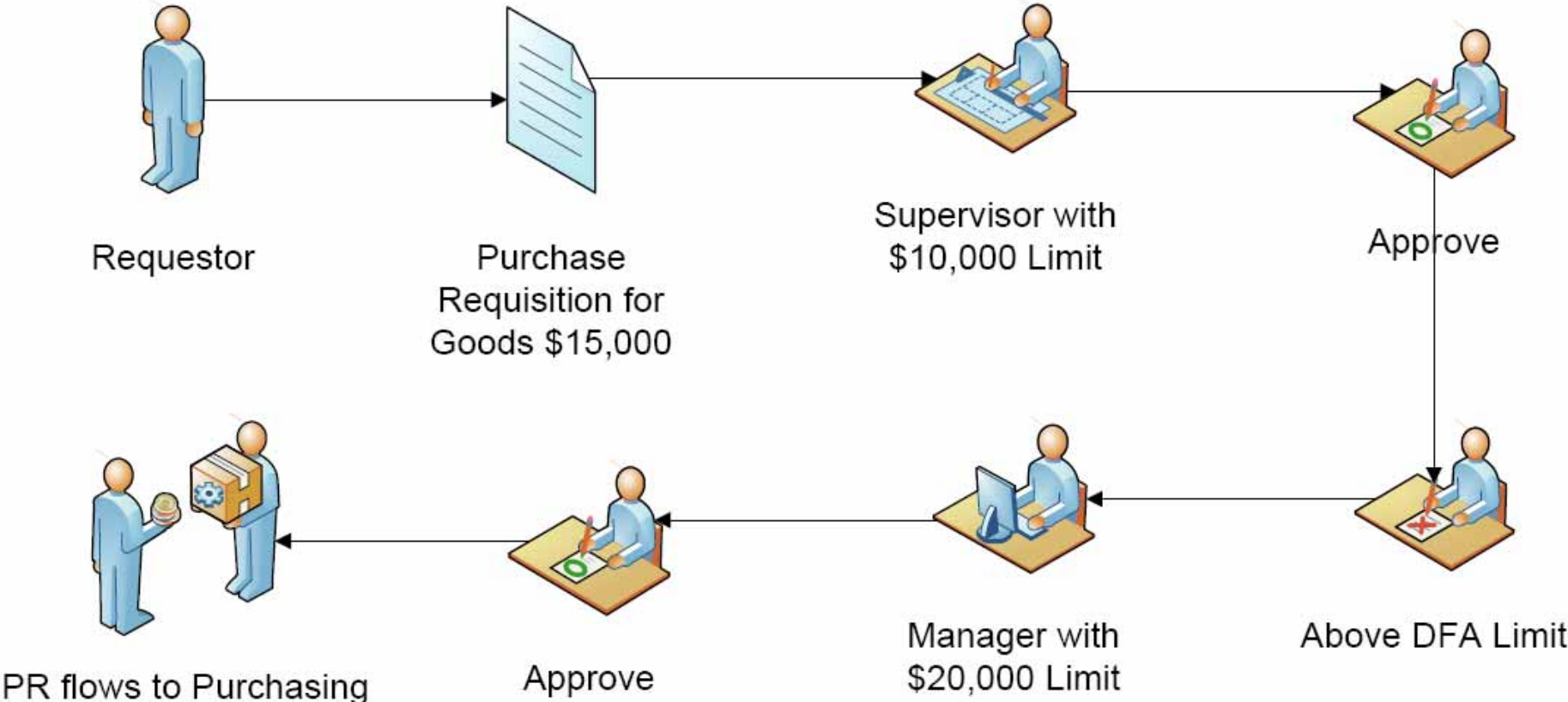
Purchasing In Maximo

- Replication of Paper System with Signing Rights
- Distributed Workforce
- Mixture of Requisition types
- Creation of Delegated Financial Authority Management within Maximo



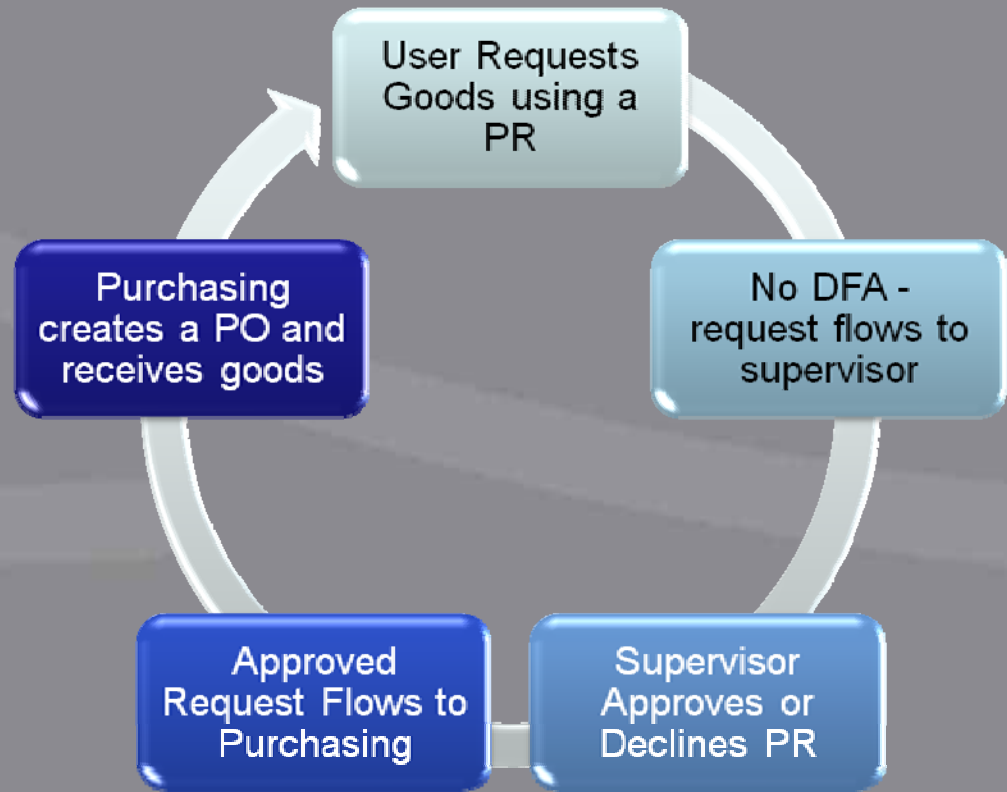
Delegated Financial Authority

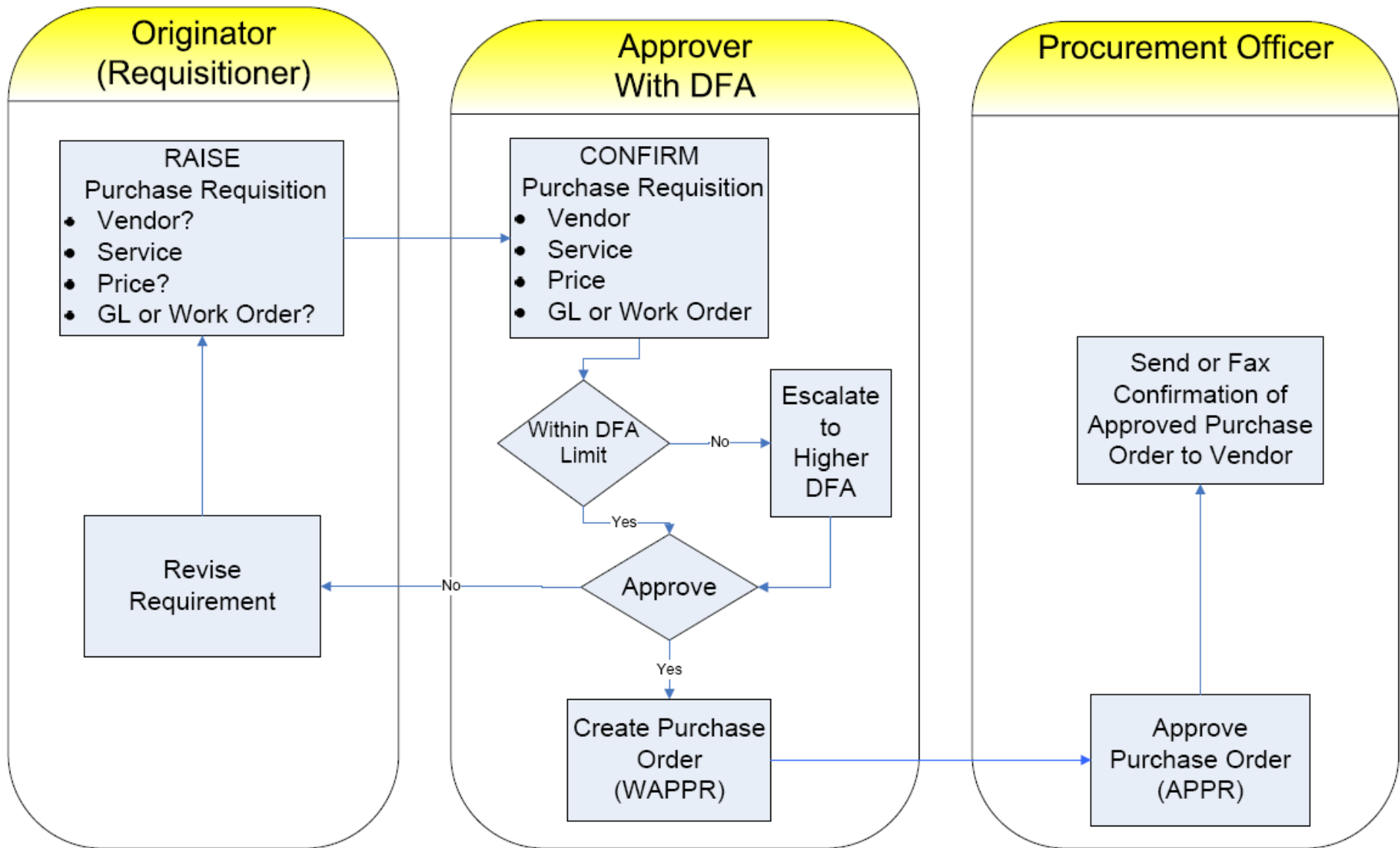
Purchasing is governed by signing rights – DFA



Proposed Purchasing Changes

- Issues with Desktop Requisitions
- Everyone can make a Purchase Request
- Items, Materials and Services can be ordered from a PR
- Items ordered create reservations against the central store





Invoicing

- Completing the Cycle with Invoicing
- Invoice Entry
 - Previously done in Financial System
 - Now entered directly into Maximo
- Invoice Entry Process
 - Add Tape
 - Batch Report



Invoicing – Batch Report

Invoices Bulletins: (0) Go To Reports Start Center Profile Sign Out Help

Find: Select Action

List Invoice Invoice Lines Terms and Conditions Specifications

Invoice: IN11626 * POLO SHIRTS & EMBROIDERY Site: PORT-NP Type: INVOICE Status: WAPPR Attachments

Invoice Details	Costs	PO Details
PO: P7204	Pretax Total: 28.50	DFA Code: DFA12
Vendor: PROTECTOR	Total Tax: 3.56	Initial DFA Code: DFA12
Vendor Invoice: 7520332	Invoice Total: 32.06	Buyer: CADWALLADE
Invoice Date: 16/02/10	Currency: NZD	Receipts: COMPLETE
Posting Date: 23/02/10 09:59:44	Total Base Cost: 32.06	Company: PROTECTOR
Vendor Invoice Amt: 32.06		Currency: NZD
DFA Code: DFA12		Total Cost: 27.00
Original Invoice:		Variance on PO: -5.06
Entered By: MITCHELLC		(A negative value indicates a cost overrun)

Remit To

Company: PROTECTOR PROTECTOR SAFETY SUPPLY (NZ) LTD

Address:

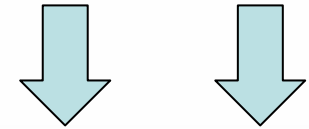
Contact:

Payment Terms:

Check Code:

Extra Fields

Invoice Batch Reconciliation



Invoice	Invoice	Status	Vendor	Entered Date	Entered By	Vendor	Invoice
IN11763	1234	ENTERED	3MEDIA GROUP LTD	24/03/2010	MAXADMIN	\$0.00	\$0.00
IN11760	4194	WAPPR	BIO-TECH PEST CONTROL	10/02/2010	ALLENP	\$101.25	\$101.25
IN11745	7544190	WAPPR	BLACKWOODS PAYKELS (A DIVISION OF WESFARMERS INDUS	24/02/2010	MITCHELLC	\$14.18	\$14.18
IN11706	00001332	WAPPR	CRITICAL CARGO CARE	24/02/2010	MITCHELLC	\$259.59	\$259.59
IN10628	51297	HOLD	DU BRAY & ASSOCIATES LTD	15/01/2010	ALLENP	\$2,677.52	\$2,677.52
IN8297	1800019769	HOLD	FONTERRA LTD	28/10/2009	MITCHELLC	\$5,960.00	\$5,960.00
IN11734	400 406 8011 FEB10	WAPPR	GENESIS ENERGY	25/02/2010	ALLENP	\$250.61	\$250.61
IN11753	PT350024734	WAPPR	GOUGH GOUGH & HAMER LTD	19/02/2010	MITCHELLC	\$116.92	\$116.92
IN11761	965-66	WAPPR	HAY GROUP LIMITED	4/02/2010	ALLENP	\$3,262.50	\$3,262.50
IN11757	541489-D01	WAPPR	JAMES WALKER NZ LTD	19/02/2010	ALLENP	\$529.14	\$529.14
IN11626	7520332	WAPPR	PROTECTOR SAFETY SUPPLY (NZ) LTD	23/02/2010	MITCHELLC	\$32.06	\$32.06
IN11754	20690897	WAPPR	RESENE PAINTS LTD	21/02/2010	ALLENP	\$145.80	\$145.80
IN11541	6592	WAPPR	SCS NEW PLYMOUTH	17/02/2010	ALLENP	\$2,889.28	\$2,889.28
IN11778	TEST	HOLD	SEASAFE SYSTEMS LTD	15/06/2010	MAXADMIN	\$500.00	\$562.50
IN11732	1800000538	WAPPR	SHELL (PETROLEUM MINING) CO LTD	25/02/2010	MITCHELLC	\$104,989.26	\$104,989.26
IN11756	10000684RI	WAPPR	SPIRAX SARCO LTD	16/02/2010	ALLENP	\$156.60	\$156.60
IN11752	64357397RI	WAPPR	STEEL & TUBE STAINLESS	25/02/2010	MITCHELLC	\$230.36	\$230.36
IN11773	123	ENTERED	STEWARTS ELECTRICAL SUPPLIES	19/05/2010	PTLADMIN	\$123.00	\$637.03
IN11779	125865	WAPPR	TITAN CRANES LTD	2/07/2010	PTLADMIN	\$500.00	\$112.50
IN11755	40080364	WAPPR	TYCO FLOW CONTROL	22/02/2010	ALLENP	\$618.75	\$618.75
Total						\$123,356.82	\$123,545.85

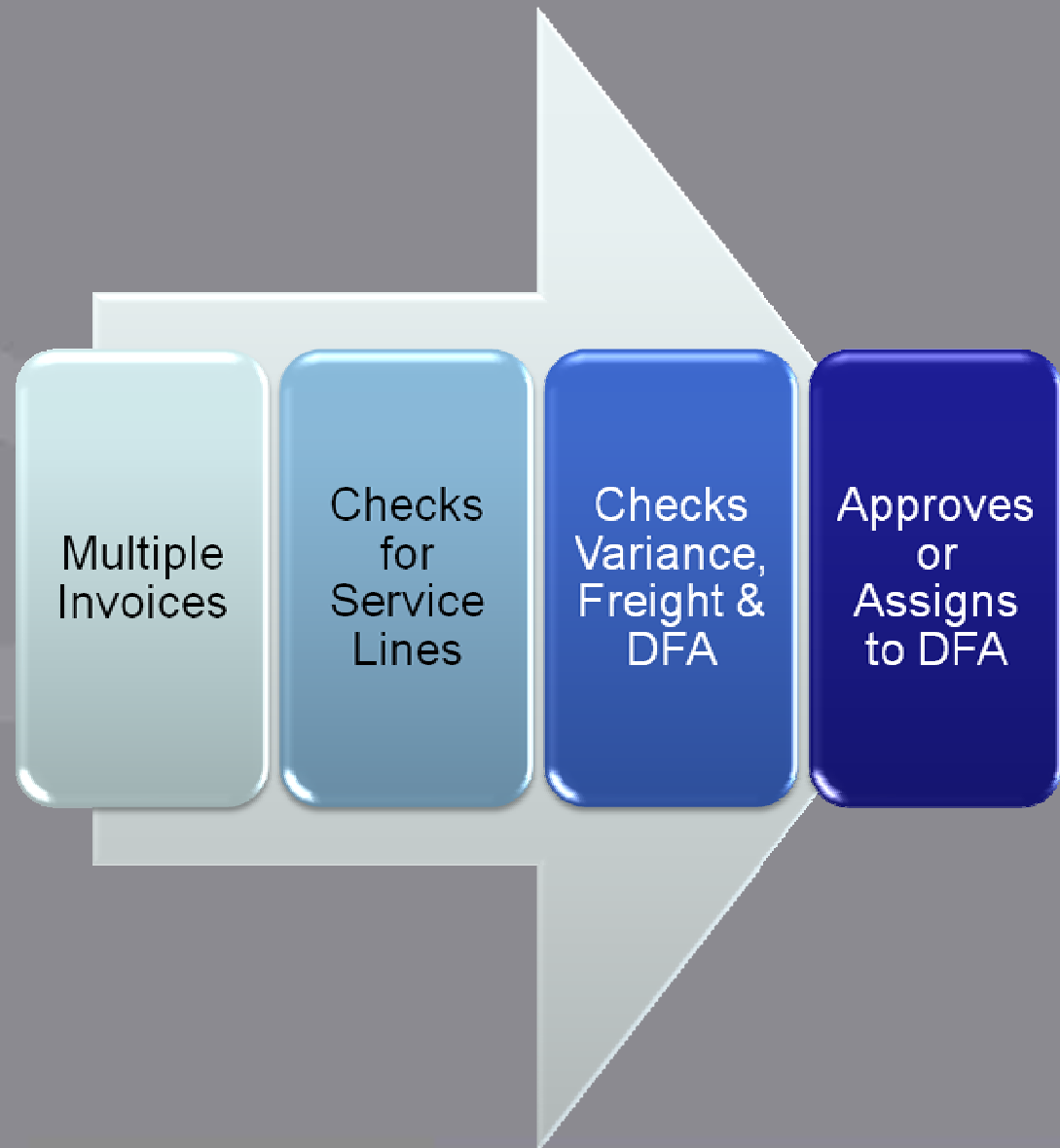


Batch Approval Workflow

Batch Reconciliation Report Correct

Select All Records Invoices and initial Batch Approval Workflow

DFA from PO is pulled to Invoice



Why Upgrade to Version 7

- Solved a few Bugs we had issues with since go live.
- Conditional User Interface
- Query Based Reporting
- BIRT Reporting
- Multiple Assets per Work Order
- Improved WO Task Management



Project Scope

- Upgrade to Version 7 & Report Redesign
- Customisation to allow purchase of items on PR
- Contractor Timesheet Capture and Processing
- Internal Labour & Plant Costing
- Automated Importing of Meter Readings



Project Team

Project Manager:

Natalie Souness

Maximo Implementer:

Certus Solutions - 2.5 people

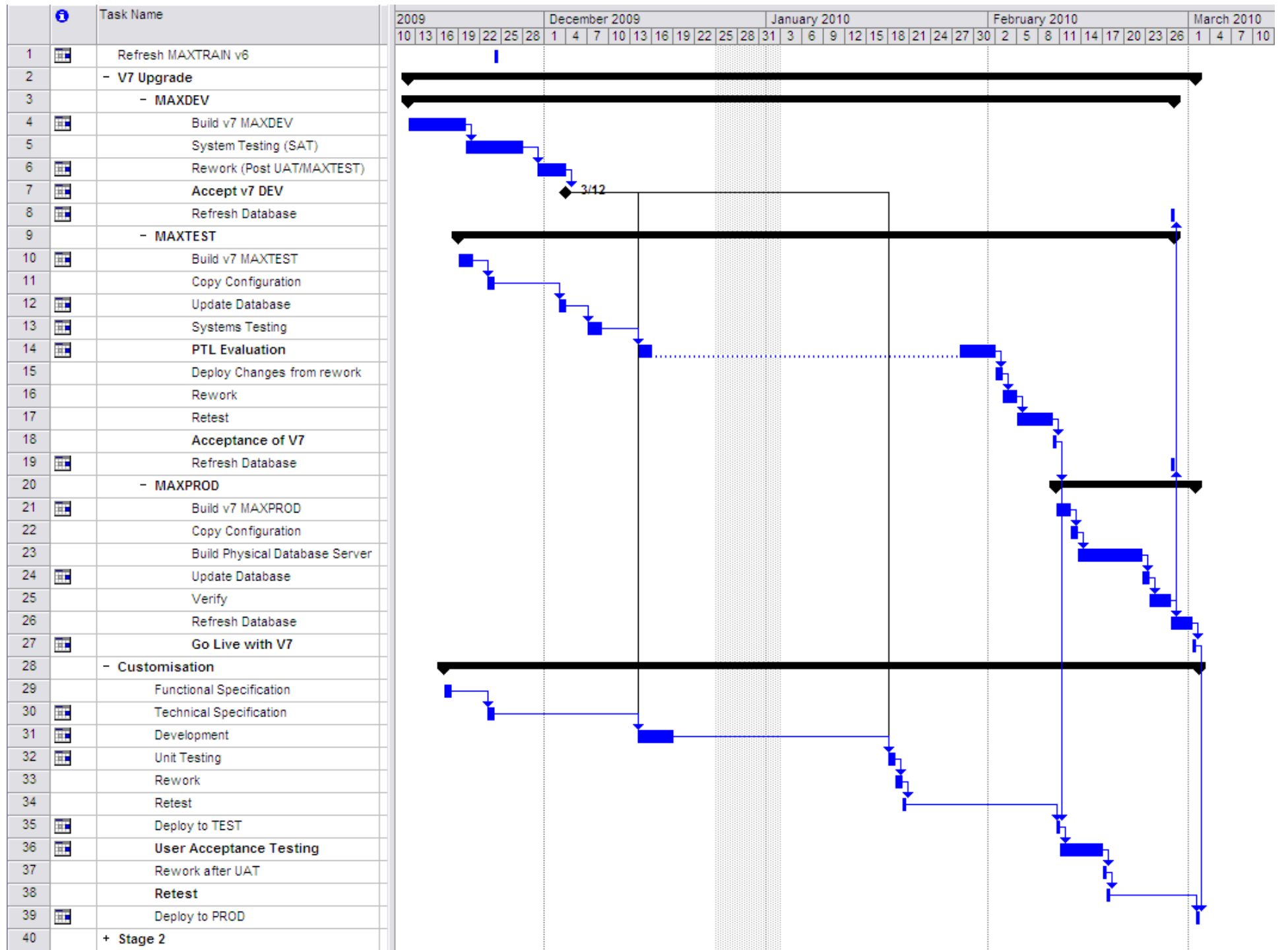
Project Team

7 part time team Members representing Maintenance, Purchasing/Stores, Finance and Marine.

Project Timeline

Stage 1 10th Nov 09 – 1st Mar 10





Purchasing Customisation

- All purchasing undertaken on PR
- Items Create Reservations on a Store
- Ability to Change Requisition Store



Further Customisations

- New Functionality - Work Order Plans Tab
- Invoices flow back to DFA for Approval

The screenshot displays the 'Work Order Tracking' application interface. At the top, there is a navigation bar with options like 'Bullets: (0)', 'Go To', 'Reports', 'Start Center', 'Profile', 'Sign Out', and 'Help'. Below this is a search bar and a 'Select Action' dropdown. The main content area shows a work order for 'W22799' with the description 'Lima crane track frame packer loose.' and site 'PORT-NP'. The status is 'WAPPR'. There are tabs for 'List', 'Work Order', 'Plans', 'Related Records', 'Actuals', 'Safety Plan', 'Log', 'Work Reporting', and 'Specifications'. Below the work order details, there are sections for 'Children of Work Order W22799' and 'Tasks for Work Order W22799'. The 'Materials' tab is active, showing a table with columns for Task, Item, Description, Quantity, Unit Cost, Line Cost, Storeroom, and Direct Issue. A single material entry is shown: 'Steel Pipe' with a quantity of 1.00, unit cost of 100.00, and line cost of 100.00. Below the table is a 'Details' section with various input fields for Task, Item, Line Type (Material), Quantity (1.00), Order Unit (LENGTH), Unit Cost (100.00), Line Cost (100.00), Storeroom, Storeroom Site, Direct Issue? (checked), Vendor (STEEL&TUBENZ), Stock Category, Condition Code, Condition Rate, Condition Enabled? (unchecked), PR, PR Line, Issue To, Required Date (22/07/10 09:47:20), and Requested By (WATSONS). At the bottom, there are buttons for 'Select Materials', 'Search Catalogs', 'Select Asset Spare Parts', and 'New Row'.

Work Order Tracking | Bulletins: (0) | Go To | Reports | Start Center | Profile | Sign Out | Help | IBM

Find: [] | Select Action []

Work Order: W22799 | *Lima crane track frame packer loose. | Site: PORT-NP | Status: WAPPR

Parent WO: []

Children of Work Order W22799 | Filter [] | Download []

Tasks for Work Order W22799 | Filter [] | Download []

Labor | **Materials** | Services | Tools

Materials | Filter [] | 1 - 1 of 1 | Download []

Task	Item	Description	Quantity	Unit Cost	Line Cost	Storeroom	Direct Issue
		Steel Pipe	1.00	100.00	100.00		<input checked="" type="checkbox"/>

Details

Task: [] | Item: Steel Pipe | Line Type: Material | Quantity: 1.00 | Order Unit: LENGTH | Unit Cost: 100.00 | Line Cost: 100.00

Storeroom: [] | Storeroom Site: [] | Direct Issue?: | Vendor: STEEL&TUBENZ | Stock Category: [] | Condition Code: [] | Condition Rate: [] | Condition Enabled?:

PR: [] | PR Line: [] | Issue To: [] | Required Date: 22/07/10 09:47:20 | Requested By: WATSONS

Select Materials | Search Catalogs | Select Asset Spare Parts | New Row

Issues and Challenges

- Issue Register
- Integration with Financials
- Inventory Balance Report
- Retraining Staff



Outcome from Upgrade

- Achieved our Goals and Timeframe
- Simpler Purchasing
- Bugs Fixed from Go-Live
- Order Materials & Services from Work order plans tab
- What we learnt
 - Testing
 - Scope Creep



Work Still in Progress

- Internal and External Labour available in Maximo
- Meter Reading Imported into Maximo
- Purchase Requisition Workflow Changes for Items
 - Fuel and Clothing
 - Choose our Requisition Store



Future Plans

- Install IT Asset Management Functionality
 - Control Procurement
 - Forecast Future IT needs
 - Reduce Compliance Violations
 - Change Management Capabilities
- User Training for BIRT



ASSET HISTORY REPORT

Thu Jul 22 16:41:31 NZST 2010



Asset 15297

LCH WESTGATE RESCUE

From 2010-01-01 to 2010-07-15

Showing Only Asset 15297

Only Main Tasks Shown

Actual Start	Actual Finish	Work Order	Description	Work Type	Remark
6/05/2010 8:23 AM	10/05/2010 11:23 AM	W24312	replace leaking Frost plug - Westgate Rescue LCH WESTGATE RESCUE	CM	Port engine turbo charger frost plugs Replace two rusty frost plugs.
25/05/2010 11:55 AM	28/05/2010 8:43 AM	W24728	Replace oil dipstick and try remove broken section LCH WESTGATE RESCUE	CM	
27/05/2010 2:21 PM	28/05/2010 11:28 AM	W24811	Re-weld broken rail - Westgate Rescue LCH WESTGATE RESCUE	CM	
6/07/2010 1:45 PM	6/07/2010 1:45 PM	W25116	Port windscreen wiper - Westgate Rescue LCH WESTGATE RESCUE	CM	cleaned armature and brushes working good.
17/06/2010 1:29 PM	17/06/2010 1:29 PM	W25306	pilot seat LCH WESTGATE RESCUE	CM	
15/06/2010 7:44 AM	16/06/2010 10:48 AM	W25343	aft lines on westgate recue LCH WESTGATE RESCUE	DAMAG	

22/07/2010 4:41 PM

Maximo It's not just for Maintenance

Recap

- 127 Port Employees
- 106 Maximo Users

- Purchasing
- Work Orders
- Inventory
- Invoicing



Questions

