



Maximo Asset Management Scheduler 7.1.1

Jerry Miller, Maximo Design Architect

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Driving Customer Pains

- Maximo planners and schedulers want the ability to view, adjust, and publish work schedules in an intuitive graphical view
- Historically, customers have used Project, Primavera or even Excel to do work and labor scheduling
 - Too heavy for 'everyday' users
 - Require extra work to integrate, to synchronize, and to maintain with Maximo
- Maximo customers want the ability to forecast Preventive Maintenance (PM) without having to create PM work orders
- Maximo customers want the ability to view consolidated craft requirements for both short term work scheduling and long range planning



Our Vision

An embedded Graphical tool in Maximo to schedule work orders / tasks and PM forecasts





Our Strategy

- Enhance the product based on customer feedback and market needs
- Continue to support our MS Project and our Primavera adapters



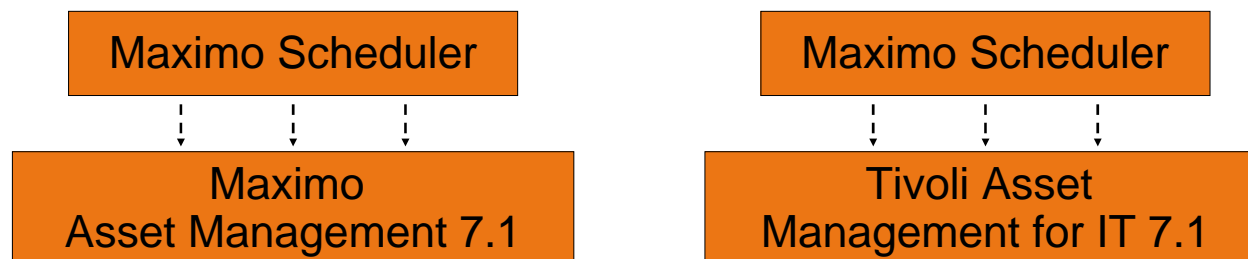
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How is it delivered?

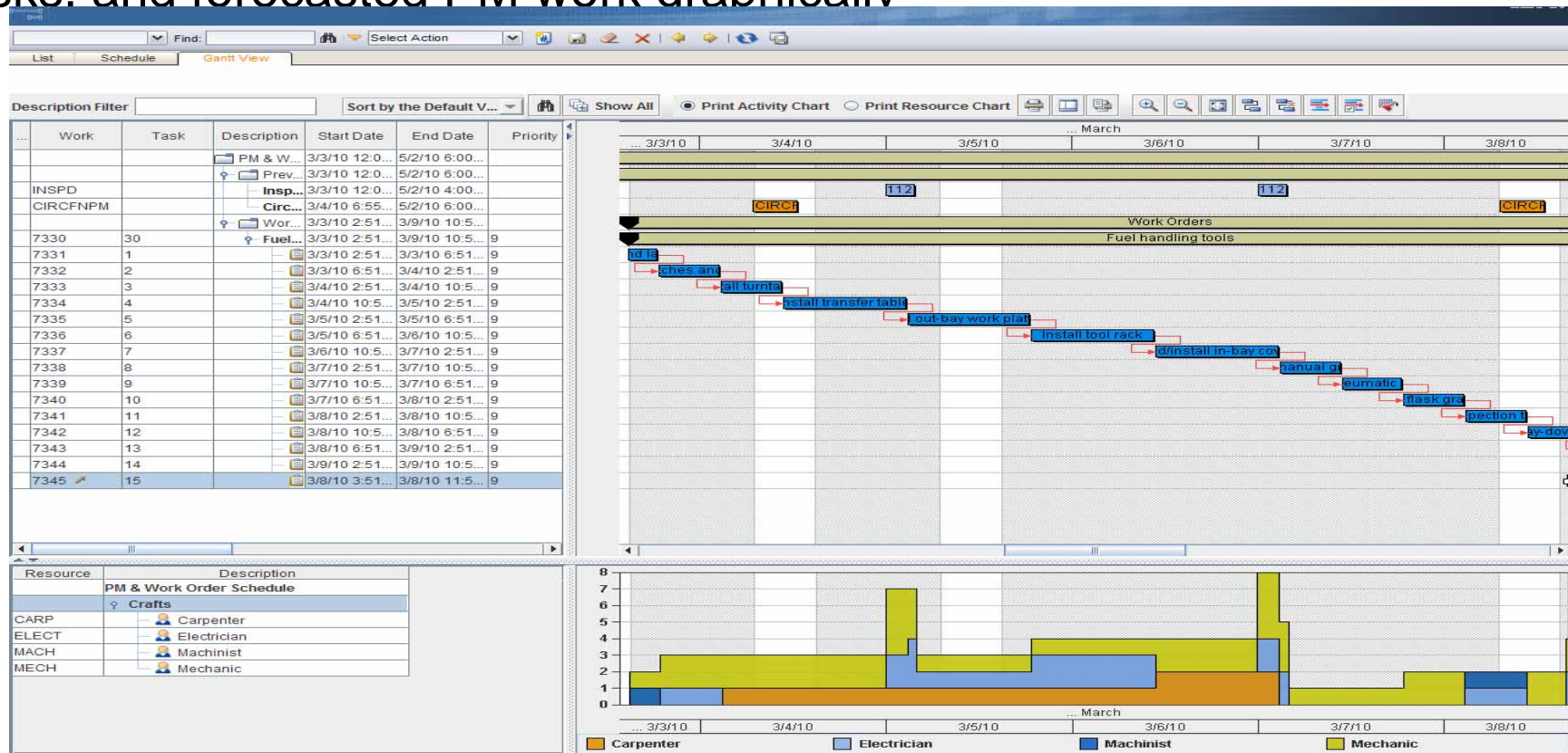
Delivered as an Add-on to:

Maximo Asset Management 7.1
and
Tivoli Asset Management for IT (TAMIT) 7.1



What is Maximo Scheduler?

A Maximo application that contains a Gantt tool to schedule work orders, tasks, and forecasted PM work graphically

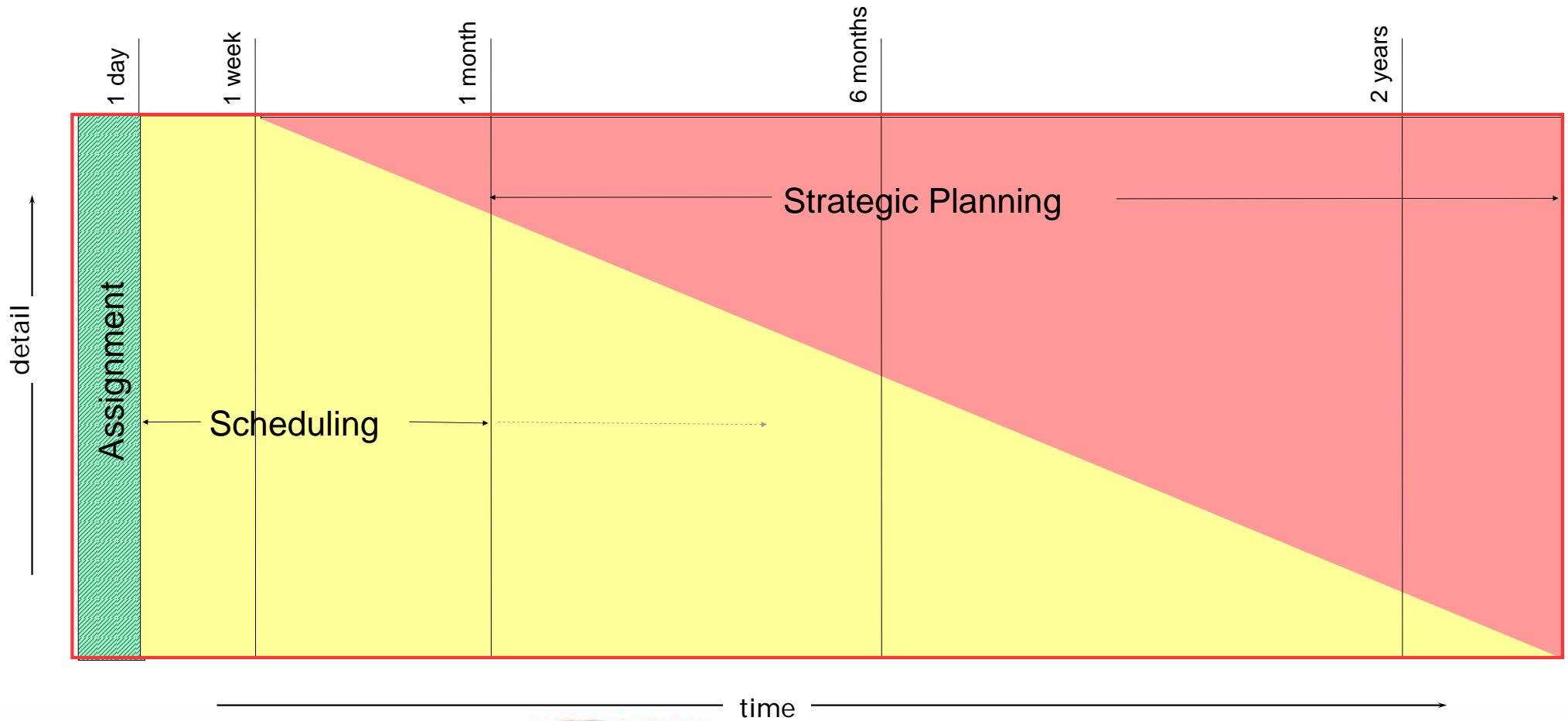




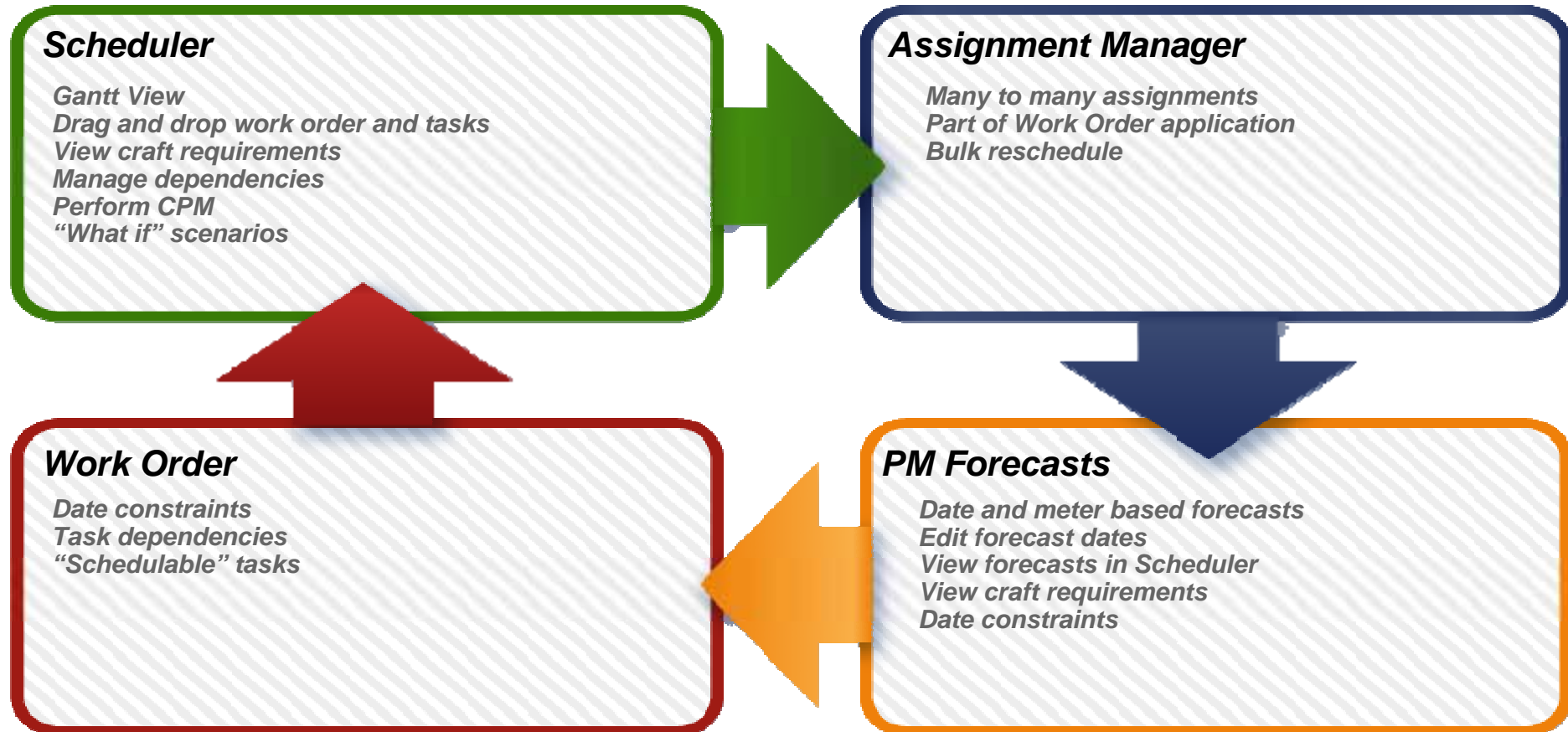
Who is it for?

- Planners
 - Forecast upcoming planned work
 - Assess long term resource requirements
- Schedulers
 - Prioritize planned and unplanned work
 - Schedule planned and unplanned work based on resource availability
- Supervisors & Technicians (mostly read only)
 - Perform scheduled work

Planning Horizon

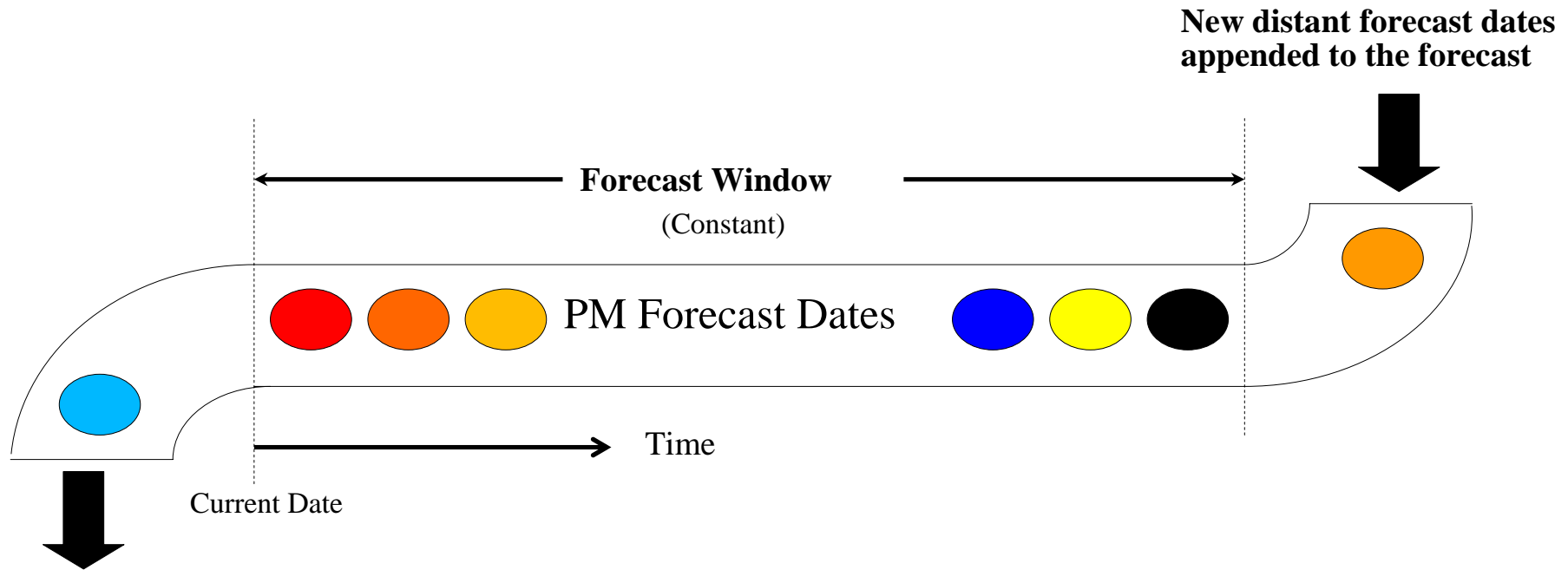


Key Features/Applications Enhanced



The “Sliding” Forecast Window

The forecast window “slides” consistently with time, as current PM dates are consumed and new ones added ... the forecast window is automatically maintained



Current forecast dates for new PM Work Orders that are now due

New distant forecast dates appended to the forecast



Benefits to the Customer

- View all planned, reactive, and forecasted work in a single, consolidated graphical view
 - All work order, task, and forecast information available in a configurable UI
 - Drag-and-drop capability allows for easy schedule manipulation based on real time information
- Optimize resource usage
 - Identify craft utilization / shortfall
- Efficient planning through “what if” scenarios
 - i.e. set schedule, then incorporate feedback from planning/production meetings
- Manage assignments directly from the work order application
- Embedded graphical tool without the need for integration
 - A graphical tool embedded in Maximo, no need to integrate to external scheduling and planning tools



How to use Maximo Asset Management Scheduler 7.1.1

- Scheduler allows the Planner to graphically set Schedule Start Dates for any work type well in advance based upon Craft availability (they can schedule the work when in all likelihood it can get done)
- Then when the work date gets closer, use Maximo Assignment Manager, directly from the WO application, to assign specific labor resources to the work
- Maximo will automatically translate Forecasted Dates into PM Work Orders



What Maximo Scheduler is Not

- It is not a budgeting tool
- It is not a project management tool
- It is not a schedule compliance tool (yet)





SCREEN SHOTS

Tabular View

[List](#) | [Work Order](#) | [Plans](#) | [Related Records](#) | [Actuals](#) | [Safety Plan](#) | [Log](#) | [Failure Reporting](#) | [Specifications](#)

Work Order: 1001 | 12 Month Service on Shipping Dept #1 Convey | Site: BEDFORD | Status: WAPPR

Children of Work Order 1001

Sequence	Task	Summary	Estimated Duration	Status	Owner	Owner Group
10	Inspect on/off and limit switches.		0:54	WAPPR		
20	Clean motor.		1:56	WAPPR		
30	Inspect gear reducer unit. Check gear box oil.		4:11	WAPPR		
40	Inspect, clean, and lubricate drive chain.		3:32	WAPPR		
50	Check conveyor belt & pulleys for proper tensi		3:11	WAPPR		
60	Inspect and lubricate roller bearings and whee		1:04	WAPPR		

Task Information

Task*: 20 | Clean motor.
 Sequence: | Status: WAPPR
 Classification: | Classification Description:

Under Flow Control? | Flow Action: | Attachments:
 Suspend Flow Control? | Flow Action Assist?: | Inherit Status Changes?:
 Launch Entry Name: | Accepts Charges?:
 Owner: | Owner Group: | Route: | Route Stop:

Work Reference Information

Reference WO: 1001-20 | Service Group: | Observation: | Inspector: | Measurement Point: | Measurement Value: | Measurement Date:

Location: SHIPPING | Shipping and Receiving Department
 Asset: 12600 | Conveyor System #1 | Service:

Scheduling Information

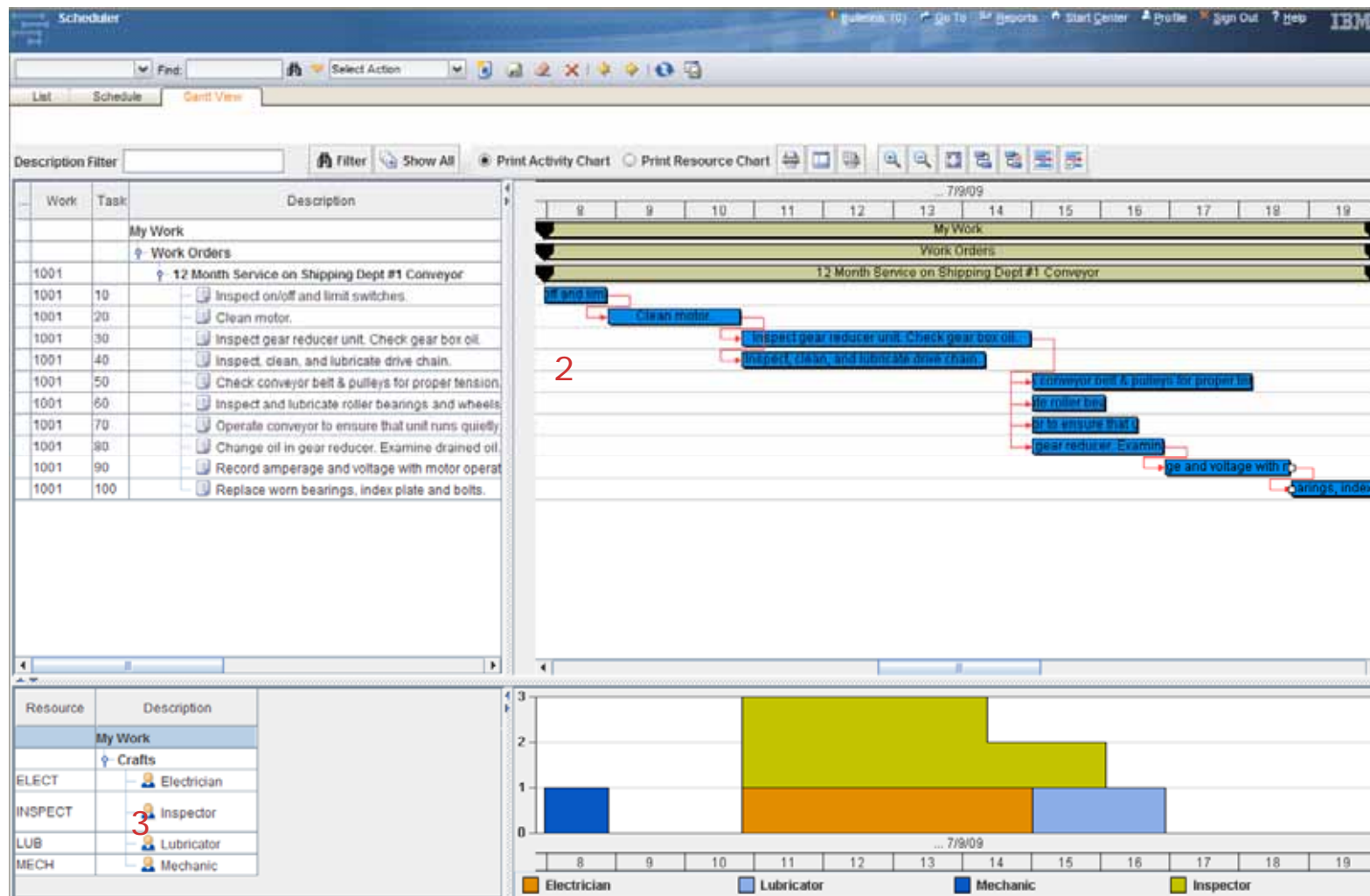
Target Start: | Target Finish: | Actual Start: | Actual Finish: | Estimated Duration: 1:56
 Scheduled Start: 7/9/09 8:53 AM | Scheduled Finish: 7/9/09 10:49 AM | Time Remaining: | Predecessors: 10

[New Row](#)

[Labor](#) | [Materials](#) | [Services](#) | [Tools](#)

Task	Craft	Skill Level	Vendor	Quantity	Labor	Regular Hours	Rate	Line Cost
10	MECH	FIRSTCLASS		1		0:00	25.00	0.00
30	ELECT	FIRSTCLASS		1		0:00	22.00	0.00
30	INSPECT			1		0:00	19.00	0.00
40	INSPECT			1		0:00	19.00	0.00

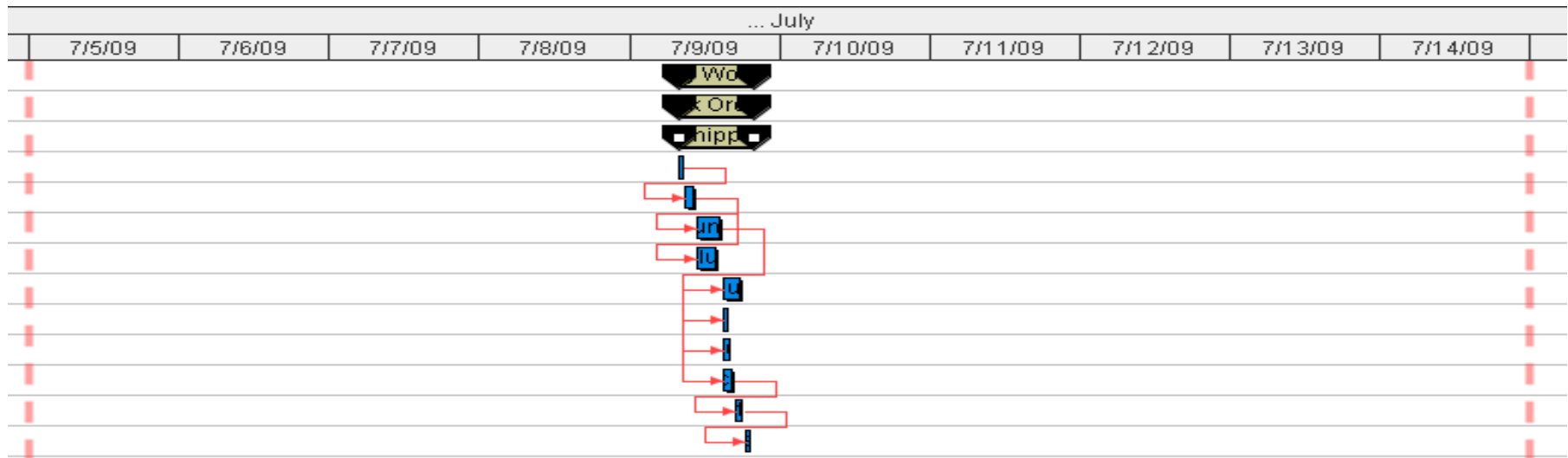
Click here
↓
Gantt View



Date Constraints

Scheduling Information

Target Start	7/7/09 8:00 AM	Actual Start	1/1/99 9:46 AM
Target Finish	7/11/09 12:00 PM	Actual Finish	
Scheduled Start	7/9/09 7:58 AM	Duration*	11:58
Scheduled Finish	7/9/09 7:56 PM	Time Remaining	
Start No Earlier Than	7/5/09 12:00 AM	Predecessors	
Finish No Later Than	7/15/09 12:00 AM	Include Tasks in Schedule?	<input checked="" type="checkbox"/>



Task Constraints

The screenshot displays a software interface for managing tasks. A table lists tasks with columns for Sequence, Task, Summary, Estimated Duration, Status, Owner, and Owner Group. A 'Select Predecessors' dialog is open, showing a list of tasks with checkboxes and relationship types (FS). A 'Select Relationship' dialog is also open, showing options for relationship types: Finish to Finish, Finish to Start, Start to Finish, and Start to Start.

Sequence	Task	Summary	Estimated Duration	Status	Owner	Owner Group
10	Inspect on/off and limit switches.		0:54	WAPPR		
20	Clean motor.		1:56	WAPPR		
			4:11	WAPPR		
			3:32	WAPPR		
			3:11	WAPPR		
			1:04	WAPPR		

Select Predecessors Dialog:

Task	Description	Site	Relationship	Lead/Lag Hours
<input checked="" type="checkbox"/>	10 Inspect on/off and limit switches.	BEDFORD	FS	0:00
<input type="checkbox"/>	30 Inspect gear reducer unit. Check gear box oil.	BEDFORD	FS	0:00
<input type="checkbox"/>	40 Inspect, clean, and lubricate drive chain.	BEDFORD	FS	0:00
<input type="checkbox"/>	50 Check conveyor belt & pulleys for proper tension.	BEDFORD	FS	0:00
<input type="checkbox"/>	60 Inspect and lubricate roller bearings and wheels.	BEDFORD	FS	0:00
<input type="checkbox"/>	70 Operate conveyor to ensure that unit runs quietly.	BEDFORD	FS	0:00
<input type="checkbox"/>	80 Change oil in gear reducer. Examine drained oil.	BEDFORD	FS	0:00
<input type="checkbox"/>	90 Record amperage and voltage with motor operating.	BEDFORD	FS	0:00
<input type="checkbox"/>	100 Replace worn bearings, index plate and bolts.	BEDFORD	FS	0:00

Select Relationship Dialog:

Define the relationship between the current work record and its predecessor. [More information](#)

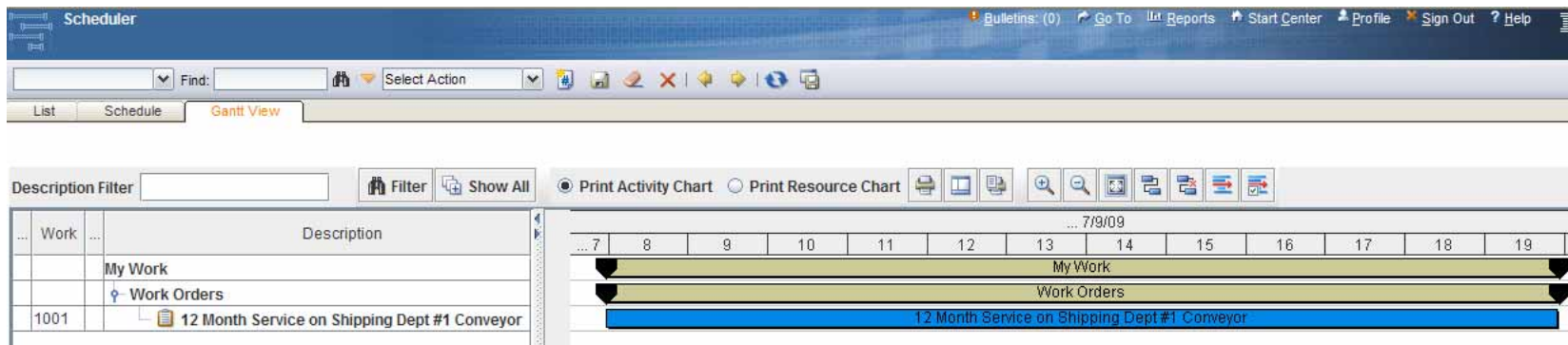
- Finish to Finish
- Finish to Start
- Start to Finish
- Start to Start

Buttons: OK, Cancel

Schedulable Tasks

Scheduling Information

Target Start	7/7/09 8:00 AM		Actual Start	1/1/99 9:46 AM	
Target Finish	7/11/09 12:00 PM		Actual Finish		
Scheduled Start	7/9/09 7:58 AM		Duration *	11:58	
Scheduled Finish	7/9/09 7:56 PM		Time Remaining		
Start No Earlier Than	7/5/09 12:00 AM		Predecessors		
Finish No Later Than	7/15/09 12:00 AM		Include Tasks in Schedule?	<input type="checkbox"/>	



PM Forecast – Options and Settings

The screenshot displays the 'Preventive Maintenance' software interface. At the top, there is a navigation bar with 'Bullatins: (0)', 'Go To', 'Reports', 'Start Center', 'Profile', 'Sign Out', and 'Help'. Below this is a search bar and a 'Select Action' dropdown menu. The main content area is divided into several sections:

- Forecast Settings:** Includes 'Site' (BEDFORD) and 'Status' (ACTIVE). Two red boxes highlight 'Forecast Dates Locked?' (checked) and 'Reforecast Subsequent Dates?' (unchecked).
- Forecast Details Table:** A table with columns for 'Forecast Date', 'Job Plan', 'New', 'Created By', 'Changed Date', 'Remarks', and 'Reforecast Pending'. The first row is highlighted with a red box.

Forecast Date	Job Plan	New	Created By	Changed Date	Remarks	Reforecast Pending
11/1/10	INS12200	<input type="checkbox"/>				<input type="checkbox"/>
11/2/10	INS12200	<input type="checkbox"/>				<input type="checkbox"/>
11/3/10	INS12200	<input type="checkbox"/>				<input type="checkbox"/>
11/4/10	INS12200	<input type="checkbox"/>				<input type="checkbox"/>
11/5/10	INS12200	<input type="checkbox"/>				<input type="checkbox"/>
11/6/10	INS12200	<input type="checkbox"/>				<input type="checkbox"/>
- Context Menu:** A menu is open over the first row of the table, listing actions such as 'Change Status', 'View Sequence', 'Generate Work Orders', 'Set PM Counter', 'Set Reading At Last WO', 'Generate Forecast', 'Delete Forecast', 'Clear Pending Reforecast', 'Lock Forecast Dates', 'Unlock Forecast Dates', 'Attachment Library/Folders', 'Duplicate PM', 'Delete PM', 'Add to Bookmarks', and 'Run Reports'. A red box highlights the 'Generate Forecast' through 'Delete PM' options.

Generating a Forecast

Generate Forecast

Enter the period of time for which to forecast preventive maintenance records. The forecast can be run in the background. Forecasted dates will appear on the Forecast tab

Last Forecast Date 3/1/11

Forecast Until* 3/1/12

Forecast For (Days)* 731

Run Forecast Generation in the Background?

Notification E-mail for Forecast Generation

NOTE: If reforecast is pending, forecast dates will be adjusted appropriately when this action is executed.

OK Cancel

Current Forecast Duration

New Forecast Duration

Background Options

The Forecast

Preventive Maintenance

Find: Select Action

List PM Frequency Seasonal Dates Job Plan Sequence PM Hierarchy Forecast

PM: CIRCENPM Circulation Fan PM (20,000 CFM)

Forecast Details Filter 1 - 9 of 9

Forecast Date	Job Plan	New Date	Changed By	Changed
2/17/10	JPCIRCFN	<input type="text"/>		
5/18/10	JPCIRCFN			
8/16/10	JPCIRCFN			
11/14/10	JPCIRCFN			
2/12/11	JPCIRCFN			
5/13/11	JPCIRCFN			
8/11/11	JPCIRCFN			
11/9/11	JPCIRCFN			
2/7/12	JPCIRCFN			

Forecast Dates

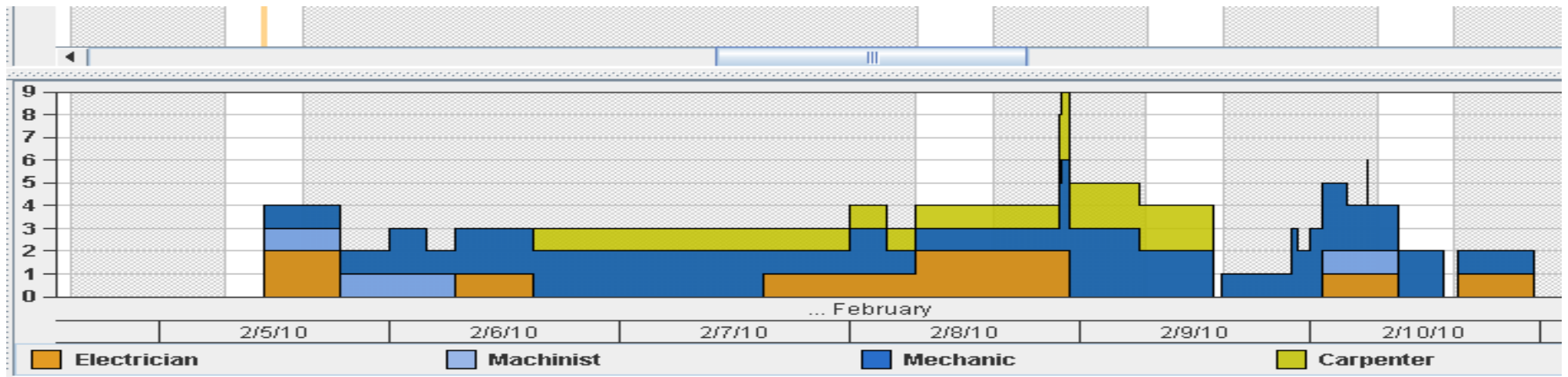
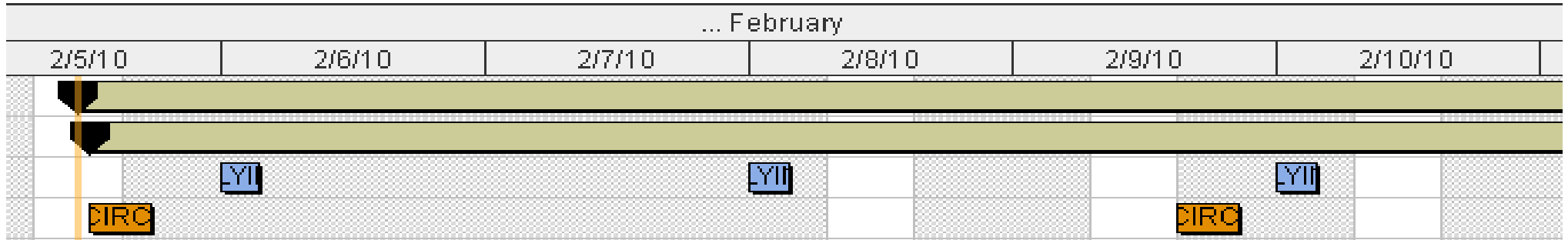
Job Plans

Changing Forecast Dates

Forecast Date	Job Plan	New Date	Changed By
2/17/10	JP11430A		
5/18/10	JP11430A	5/19/10	WILSON
8/16/10	JP11430A		
11/14/10	JP11430		
2/12/11	JP11430A		
5/13/11	JP11430A		
8/11/11	JP11430A		
11/9/11	JP11430		
2/7/12	JP11430A		

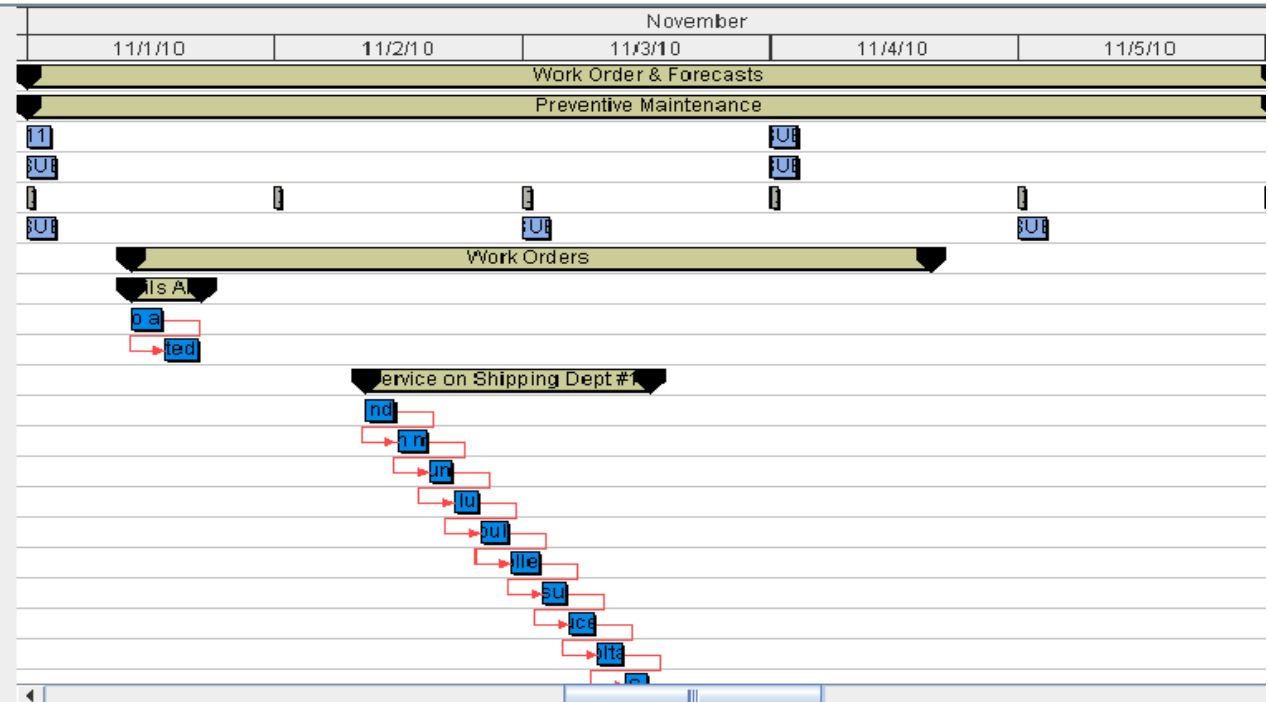
New Forecast Dates

PM Forecast Segments on the Gantt View

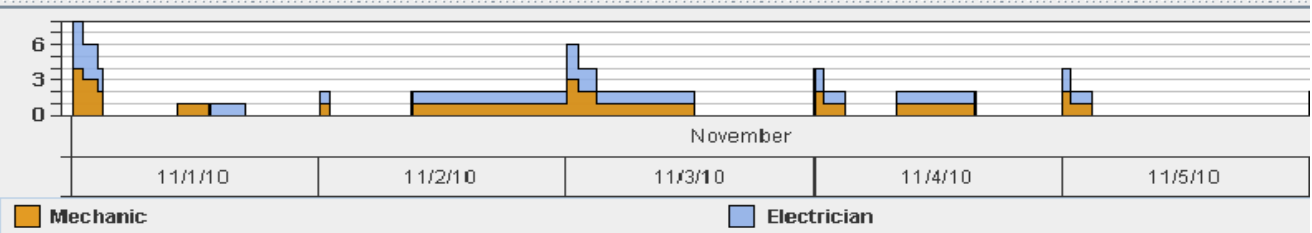


The REAL Value

Work	Task	Description
		Work Order & Forecasts
		Preventive Maintenance
1010		Inspection - with Job Plan Sequence
1011		Inspection - Has effect on Subsequent Forecasts
1008		Daily Inspection - Forecast Dates Locked
1009		General Inspection - No effect on Subsequent Foreca...
		Work Orders
1153		Relocate Guard Rails Around Compressor
1153	10	Relocate guard rails to allow fork truck access
1153	20	Relocate associated electrical conduit
1154		12 Month Service on Shipping Dept #1 Conveyor
1154	10	Inspect on/off and limit switches.
1154	20	Clean motor.
1154	30	Inspect gear reducer unit. Check gear box oil.
1154	40	Inspect, clean, and lubricate drive chain.
1154	50	Check conveyor belt & pulleys for proper tension.
1154	60	Inspect and lubricate roller bearings and wheels.
1154	70	Operate conveyor to ensure that unit runs quietly.
1154	80	Change oil in gear reducer. Examine drained oil.
1154	90	Record amperage and voltage with motor opera...



Resource	Description
	Work Order & Forecasts
	Crafts
ELECT	Electrician
MECH	Mechanic



Assignment Tab – Required Crafts

Work Order Tracking

Find: [] Select Action []

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

Work Order: 1000 **Relocate Guard Rails Around Compressor**

Parent WO: []

Site: BEDFORD Status: WAPPR

Scheduled Start: [] Target Start: 12/31/98 8:00 AM

Scheduled Finish: [] Target Finish: 12/31/98 3:00 PM

Assignments Filter 1 - 4 of 4

Task	Description	Craft	Skill Level	Labor	Scheduled Start	Hours	Status
	Relocate Guard Rails Around Compressor	ELECT	FIRSTCLASS				
	Relocate Guard Rails Around Compressor	MECH	FIRSTCLASS			7:00	WAITASGN
	Relocate Guard Rails Around Compressor	ELECT	FIRSTCLASS			7:00	WAITASGN
	Relocate Guard Rails Around Compressor	MECH	FIRSTCLASS			7:00	WAITASGN

Available Labor Complete Assignment New Row

Craft/Skill requirements as per Plans tab

Assignment Tab – Available Labor

Available Labor

To find labor available during a specific date range, enter the dates in the From and To fields. To include labor who are already assigned to other jobs, select Include Fully Assigned.

From* Location
 To* Vendor
 Include Fully Assigned? Contract

[Refresh](#)

Labor	Name	Craft	Skill Level	Work Location	Shift	Start Time	Available Hours	Assigned
HORN	Christine Horn	ELECT	FIRSTCLASS	NEEDHAM	DAY	3/1/10 7:00 AM	8:00	<input type="checkbox"/>
LIBERI	Diane Liberi	ELECT	FIRSTCLASS	NEEDHAM	DAY	3/1/10 7:00 AM	8:00	<input type="checkbox"/>
PEDRICK	Mike Pedrick	ELECT	FIRSTCLASS	NEEDHAM	DAY	3/1/10 7:00 AM	8:00	<input type="checkbox"/>
WILSON	Mike Wilson	ELECT	FIRSTCLASS	NEEDHAM	DAY	3/1/10 7:00 AM	8:00	<input type="checkbox"/>

[Cancel](#)



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