## Smarter Infrastructure Upgrade Planning Series

Maximo Asset Configuration Manager (ACM) 7.5

Rob Powell and Lee Cotton

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### Agenda

- Introduction and Objectives
- Release Time Line
- Upgrade Paths
- Feature Deep Dive

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#### Introductions and Objectives

- Rob Powell
  - Lead Designer & Architect for Maximo ACM
- Lee Cotton
  - Designer & Senior Software Developer for Maximo ACM



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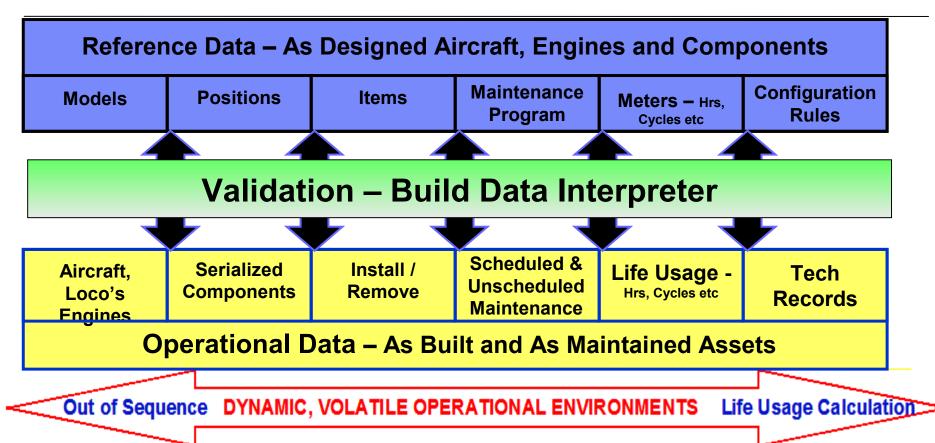
### Maximo Asset Configuration Manager (ACM)

- Maximo ACM is a 'Maximo Add On Solution'
- Designed to manage the configuration management requirements for complex, high value assets where: Safety, Regulatory Compliance and Asset Availability are critical to the organization
- Asset Configuration Manager automates complex asset lifecycle management by more efficiently managing the current and historical configurations of complex assets and component assets.





## Maximo ACM – Design Concept



#### Advantages of the ACM Design – compliance and efficiency!

- Minimises number of Aircraft Models required
- Dynamically validates and alerts aircraft configuration
- Enables out of sequence transactions
- •Efficient process for Design Change, e.g. EO / AD / SB effectivity
- Optimisation of Inventory



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## Maximo ACM Release Time Line

2007	2008	2009	2010	2011	2012	2013	
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	Release	
Version	Date	Change
6.2.1	Mar-07	Initial release
6.2.3	23-Jun-08	Fix Pack
6.2.4	12-Mar-09	Fix Pack
7.1.0	26-Sep-08	Initial release on v7
7.1.1	18-Dec-09	Service Lifecycle Management release
7.1.1.1	14-May-10	Fix Pack
7.1.1.2	05-Jul-11	Fix Pack including BDI enhancements
7.5.0	29-Apr-11	Enhancements to Planning functionality
7.5.0.1	14-Oct-11	Fix Pack including BDI, MIF & V-tree enhancements



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## **Upgrade Paths**

Product	v6 Requirements	v7.1 Requirements	v7.5 Requirements
Maximo Asset Configuration	Maximo Asset     Management 6.2.8	Maximo Base Services     7.1.1.10	Maximo Base Services     7.5.0.3
Manager	<ul> <li>Maximo Asset         Configuration         Manager 6.2.4     </li> </ul>	Maximo Asset     Configuration Manager     7.1.1.2	• Maximo Asset Configuration Manager 7.5.0.1

#### **Hot Fixes**

Latest hot fix for Maximo Base Services and the Industry Solutions and add-ons should be installed.

**NB.** Note your system must be at Maximo 7.1.1.10 before attempting the upgrade to 7.5. There is no direct upgrade from Maximo 6.2.8 to Maximo 7.5



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#### IBM Maximo 7.5 Functional Modules

#### TDM

### Asset Management

- Locations
- Repair Facilities\*
- Asset
- Asset Templates\*
- Failure Codes
- Linear Assets
- Visual Control\*
- Condition Monitoring
- Meters
- Meter Groups
- Asset Attributes (CM)
- Asset Attributes Setup (CM)
- Assets (CM)
- Models (CM)\* includes MFI
- New Asset Assemblies (CM)
- New Asset Assemblies -Receiving (CM)
- •BDI Queue Status (CM)\*
- Build Position Master (CM)
- CM Item Master (CM)
- Technical Records (CM)
- Capability (CM)
- Company Master (CM)\*
- DVL Setup (CM)
- Events Management (CM)
- Fleet Management (CM)
- Fleet Usage Load (CM)

#### Work Management

- Job Plans
- Job Plan Revisions\*
- Routes
- Service Requests
- Work Order Tracking
- Assignment Tab\*
- Hard/Soft Reservations\*
- Repair Facilities\*
- Safety
- Quick Reporting
- Labor/Crafts
- Tools
- Preventive Maintenance
- PM Forecasting\*
- Master PM
- Assignment Manager
- Job Plans (CM)\*
- Log Book (CM)\*
- Maintenance Forecasting (CM)
- Maintenance Locations (CM)
- Maintenance Planning (CM)\*
- Master PM (CM)\*
- •PM Groups (CM)\*
- Preventive Maintenance (CM)\*
- Work Order Tracking (CM) \*

#### Purchasing

- Request for Quotation
  - Receiving

**Materials** 

Management

Item Master

Storerooms

Inventory Usage\*

Consignment\*

Default Costing\*

Condition Codes

Stocked Tools

Service Items

Inventory (CM)

(CM)

Issues and Transfers

• Item Master (CM)

LIFO/FIFO Costing\*

Transfer via shipment\*

Inventory

- Receiving Inspections
- Shipment Receiving\*
- Purchase Requisitions
- Invoices
   Invoice Reversals\*
- Purchase Orders Revisions\*
- Receipt Tolerance\*
- Desktop Requisitions
- Purchase Orders (CM)
- Purchase Requisitions (CM)
- Receiving (CM)
- Request for Quotations (CM)

#### Contract Management

- Purchase Contracts
- Master Contracts
- Warranty Contracts
- Lease / Rental Contracts
- · Labor Rate Contracts
- Premium Pay Rates\*
- Payment Schedules

#### Service Management

- Service Groups\*
- SLA Management\*
- Incidents
- Problems
- Changes
- Releases
- Solutions

\* New or enhanced in Version 7.5

#### **Enhanced Workflow in SLAs and Escalation Manager**

Configuration - UI, Database Fields, and Applications; Context Based Screens

Maximo Integration Framework (MIF) - Native Integration Capabilities. Migration Manager. Upgrade across suite.

**KPIs / Reporting / Analysis** 

**Security & Administration** 



#### **Maximo ACM 7.5 Release – Total of 36 Applications!**

Asset Attributes (CM)

Asset Attributes Setup (CM)

Assets (CM)

BDI Queue Status (CM)

Build Position Master (CM)

CM Item Master (CM)

Capability (CM)

Company Master (CM)\*

DVL Setup (CM)

Events Management (CM)

Fleet Management (CM)

Fleet Usage Load (CM)

Inventory (CM)

Issues and Transfers (CM)

Item Master (CM)

Job Plans (CM) ~

Log Book (CM) ~

Maintenance Forecasting (CM)

Maintenance Locations (CM)

Maintenance Planning (CM) ~

Master PM (CM) ~

Models (CM) ~

New Asset Assemblies (CM)

New Asset Assemblies - Receiving (CM)

Organizations (CM) ~

PM Groups (CM)\*

Preventive Maintenance (CM) ~

Purchase Orders (CM)

Purchase Requisitions (CM)

Receiving (CM)

Request for Quotations (CM)

Result Set Setup (CM)\*

Security Groups (CM)

Series (CM)

Technical Records (CM) ~

Work Order Tracking (CM) ~

<sup>\*</sup> New in 7.5

<sup>~</sup> Enhanced in 7.5

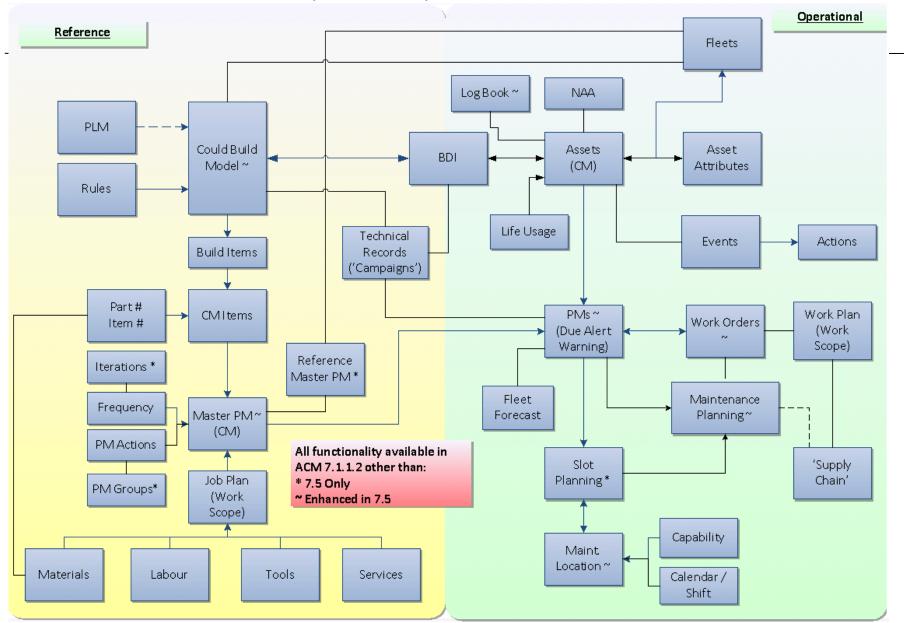


#### Maximo ACM 7.5 - Content

- The following major functional Enhancements were introduced as part of the Maximo ACM 7.5 release:
  - Minimum Equipment List (MEL) capability
  - PM Enhancements
  - Slot Planning (Pt 2)
  - Procurement & Inventory (cannibalization) (Pt 2)
  - Event Planning / Work Packaging (Pt 2)
  - Performance Enhancements
- Maximo AM 7.5.0.1 Fix Pack:
  - Enhancement to MIF
  - BDI Enhancements
  - V-tree enhancements

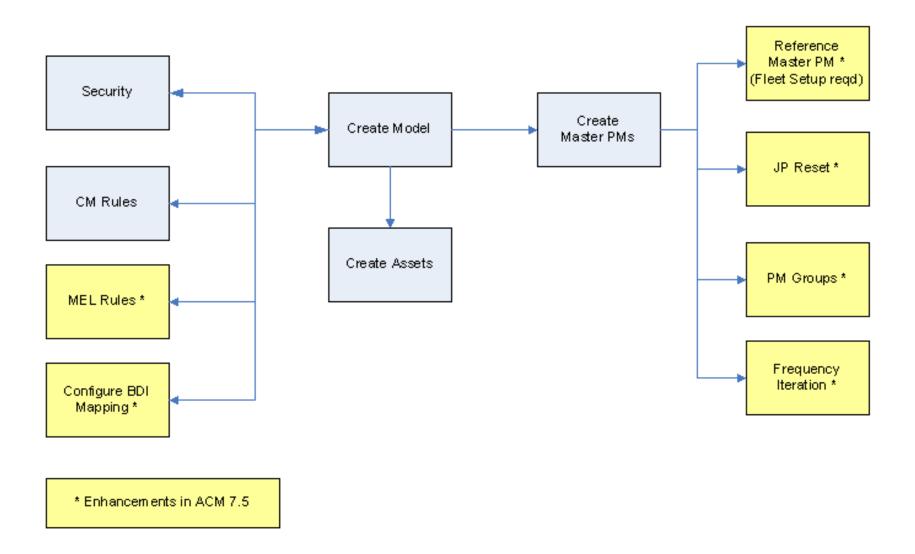
#### ACM 7.5 'White Board' (schematic)





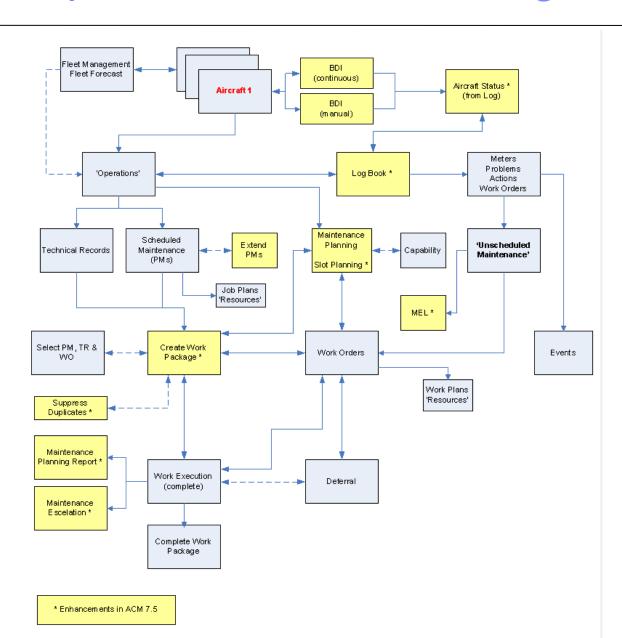


### ACM Reference Data – Changes in 7.5





## ACM Operational Data – Changes in 7.5





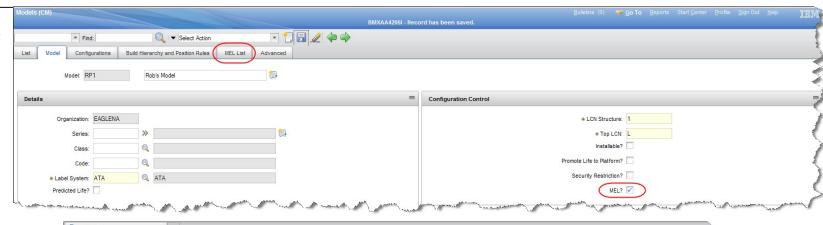
## Minimum Equipment List (MEL)

- MEL is a standard requirement for aircraft operators and is also relevant to rail operations.
- MEL provides the ability to operate the assets in accordance with the approved and regulated configuration. MEL defines the minimum list of equipment (assets) required to be fitted for the assets to operate. It categorises each MEL item and provides the capability to defer the time for which the asset may operate with one or more pieces of equipment not fitted.
- This requirement relates to the following existing ACM applications: Model, WO Tracking (CM), WO Deferral, Logs (CM) and BDI validation processes.

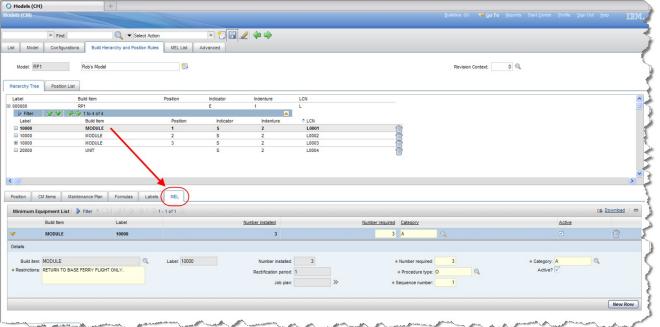


### MEL – Reference Data – in the Model

MEL Flag – conditional UI

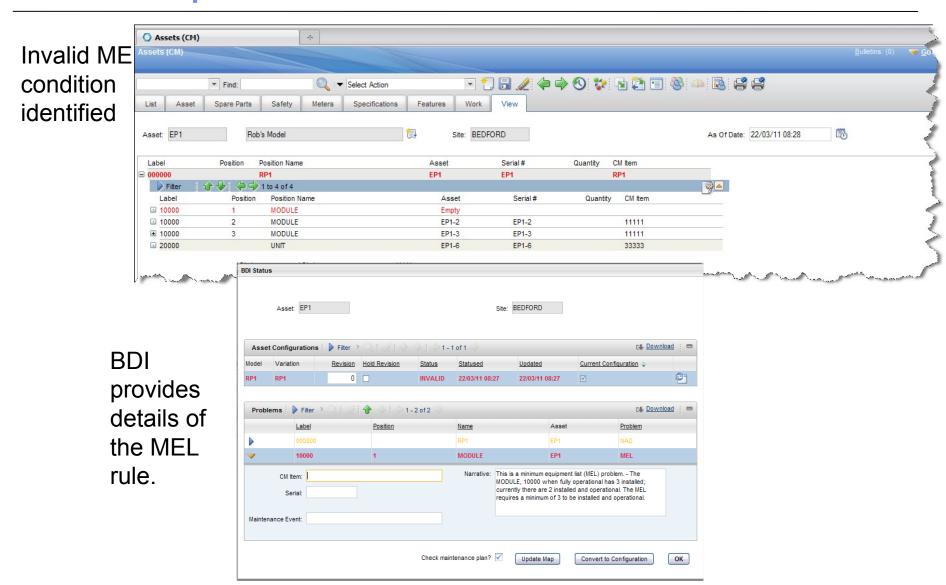


Define MEL Rules – the system identifies the number installed by Build Item and Label



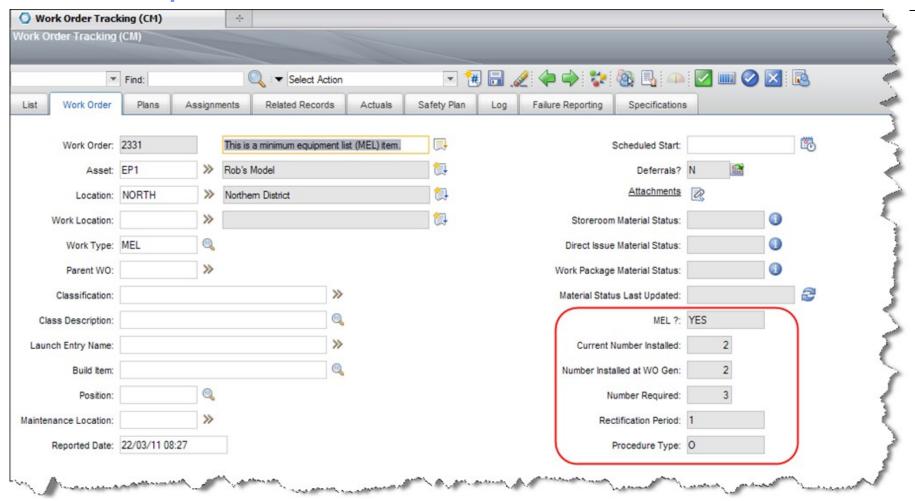


## MEL – Operational Data – in the Asset





## MEL – Operational Data – in the Work Order



MEL Details defined in the WO associated with the invalid MEL condition



## MEL – Operational Data – in the Log Book



MEL Details displayed in the Log Book – ensures that the operator has visibility of open MEL conditions



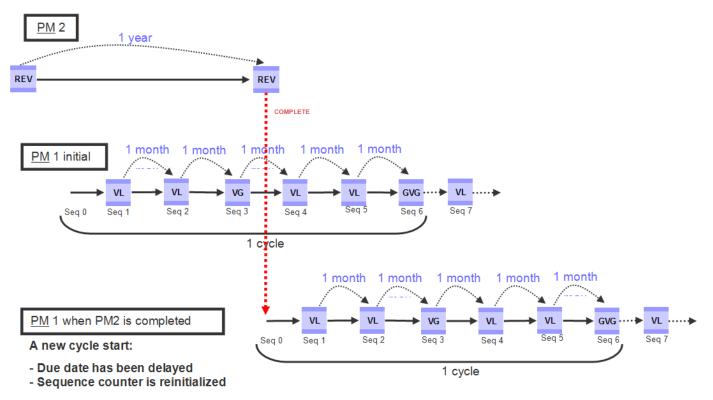
### PM Enhancements

■ ACM has specific functionality for Master PM and PM that extends the standard Maximo capability for managing preventative maintenance. This capability has been further extended by introducing a number of new capabilities that will enable complex maintenance schedules and associated rules to be defined and managed. This includes the utilization of an average ACM meter to derive PM due date, deferral of PM due point, Job Plan sequence counter reset, grouping of PMs.



### PM Enhancements - Job Plan Sequence Reset

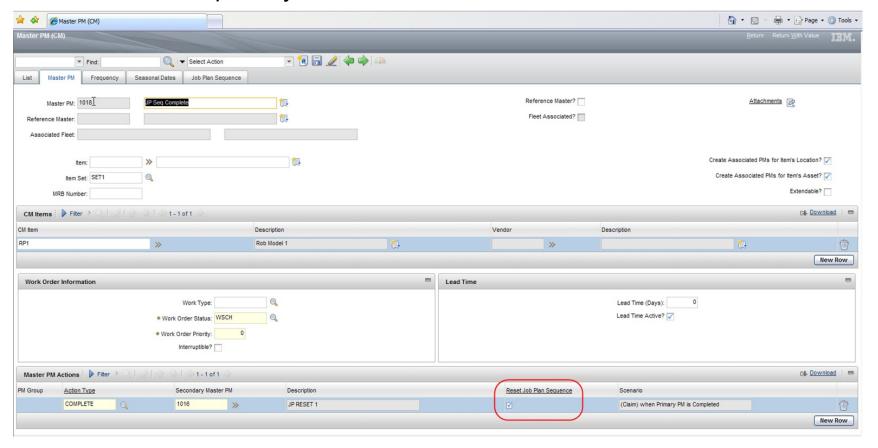
The Job Plan Sequence reset function builds on the existing PM Actions functionality; when a PM is completed by a PM Action it is possible to 'reset' the Job Plan sequence to it's initial value – this is set by a Flag on the Master PM (CM) / PM (CM).





### PM Enhancements - Job Plan Sequence Reset

Reset Job Plan Sequence flag added to Master PM Actions – when true the Secondary PM's Job Plan Sequence will be reset on completion of the Work Order associated with the 'primary PM'.

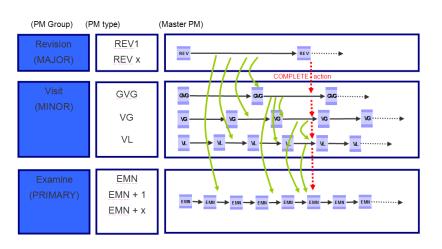




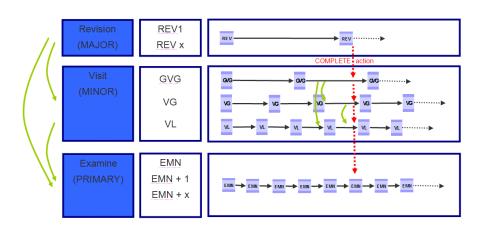
## PM Enhancements - PM Groups

The PM Groups enhancement is designed to more efficiently manage multiple "PM actions". This enables the ability to classify Master PMs by "PM Groups" and thereby to enter and manage PM actions more easily. PM Groups is a new application that utilises a graphical, hierarchical UI to create, manage and view PM Groups.

In the example below the number of PM Actions required is reduced by 40%



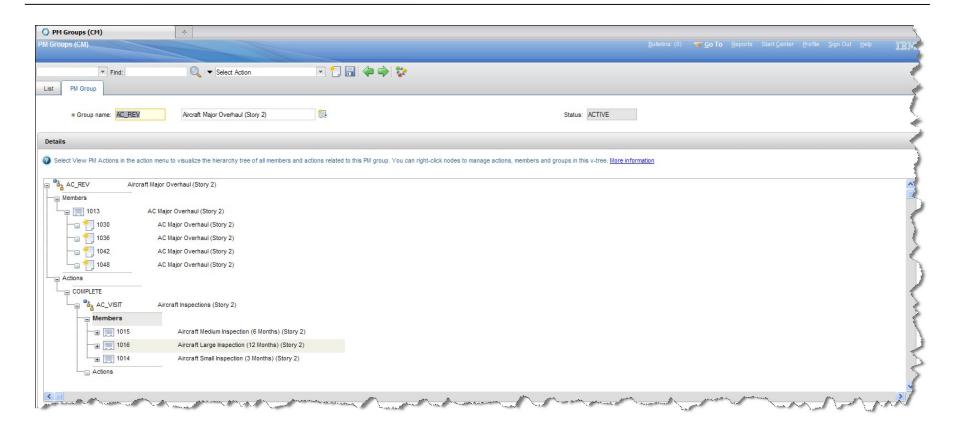
Without PM Groups – 10 Actions required



With PM Groups – 6
Actions required



## PM Enhancements - PM Groups



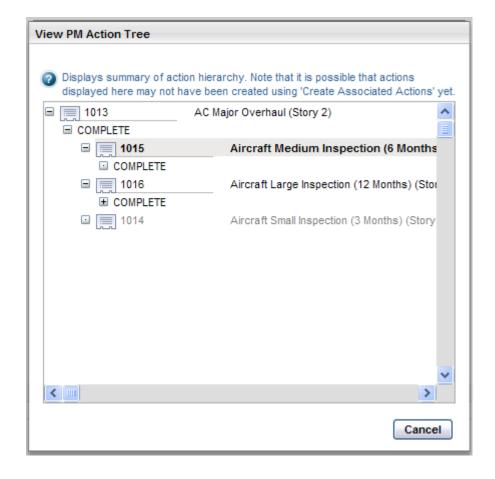
PM Groups – graphical representation of PM Groups, Master PMs and their relationships with PM Actions.

The Actions defined here are written to the Master PM as PM Actions



## PM Enhancements - PM Groups

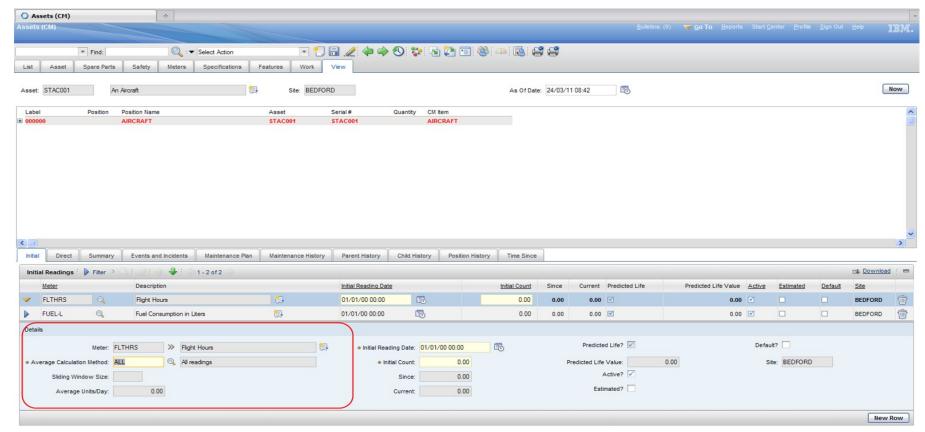
By selecting any node in the PM Action Tree can be launched to display a summary of the PM Groups, associated Master PMs, PMs and PM Actions.





## PM Enhancements - Meter Average

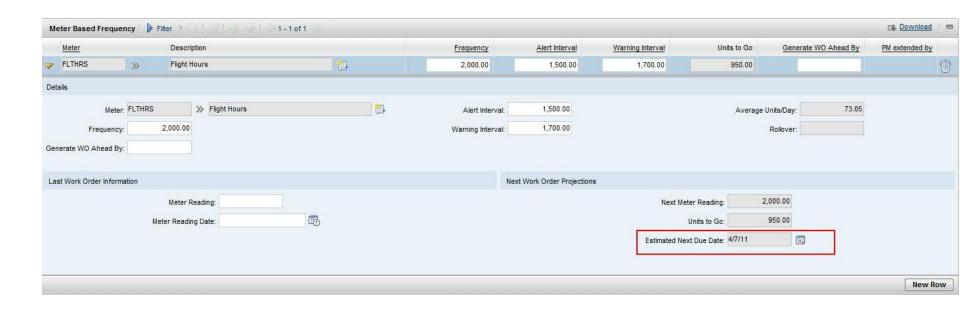
"As a maintenance planner I want the system to calculate the next due date of a meter based PM based on the average meter utilisation of the related asset so that I can plan maintenance efficiently".



Meter Average added to Assets (CM) / Initial (meter) tab



## PM Enhancements - PM Meter Based Frequency

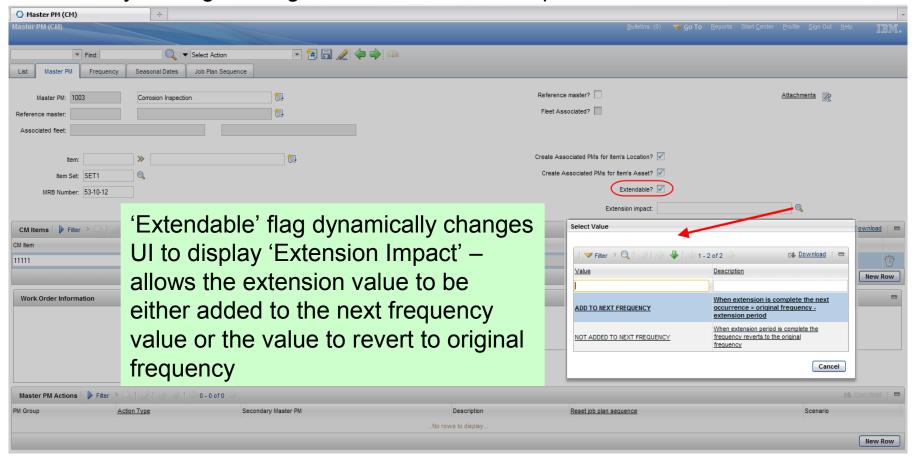


The meter average is used to calculate the 'Estimated Next Due Date' for a PM Meter Based Frequency



### PM Enhancements - Extensions

As a maintenance planner I want to be able to extend the due date of a PM and for subsequent PM due dates to be automatically recalculated so that I can efficiently manage changes to the maintenance plan.





## PM Enhancements - Frequency Iterations

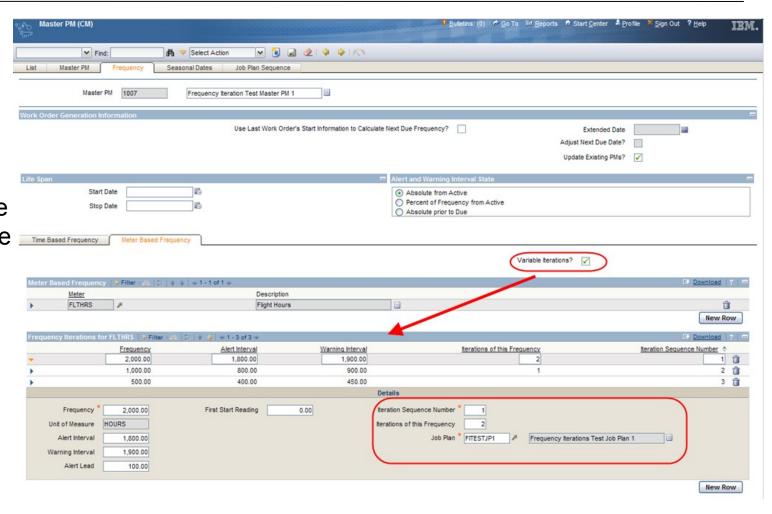
As a maintenance planner I want to be able to define PM frequency iterations against planned maintenance so that I can meet the regulatory and safety requirements.

Client Example: An Airline will often have a need to vary the frequency between inspections; for example, when a problem has been detected with the main landing gear it may be necessary to increase the frequency of periodic inspections. The first 2 inspections take place at 1,000 cycle intervals, the 3rd at 1,500 cycles and all subsequent inspections at 2,000 cycle intervals. A similar example may also be applied to time based frequencies by replacing cycles with days.



## PM Enhancements - Frequency Iterations

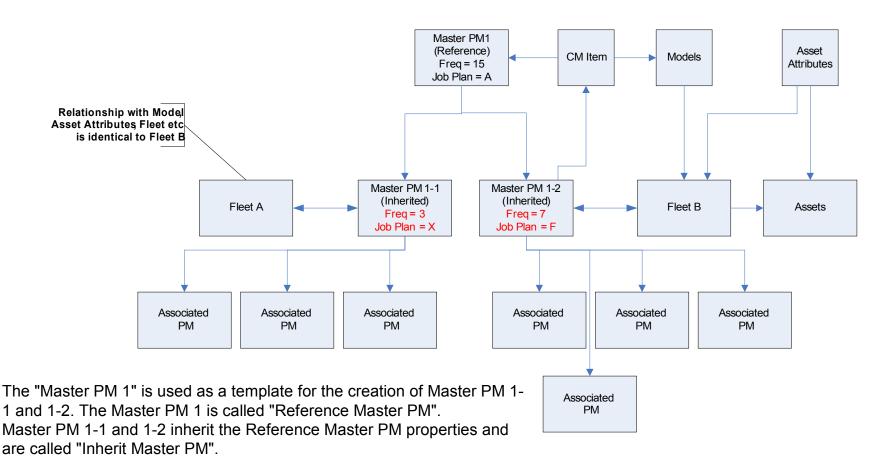
'Variable Iterations' flag dynamically changes UI to display 'Frequency Iterations' frame allows multiple iterations to be displayed with specific Job Plans per iteration if required/





### PM Enhancements - Reference Master

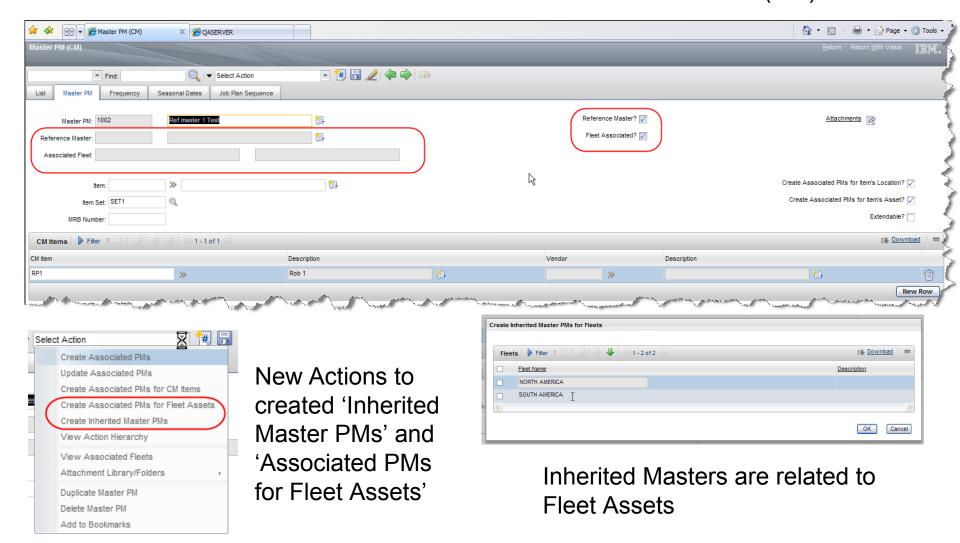
As a maintenance planner I want to be able to be able to manage Master PMs based on a 'Master PM template' so that I can manage Master PMs more efficiently based on a Fleet.





### PM Enhancements - Reference Master

'Reference Master' and 'Associated Fleets' fields added to Master PM(CM)





## PM Enhancements - Manage Open Work Orders That Are Associated With Deactivated PMs

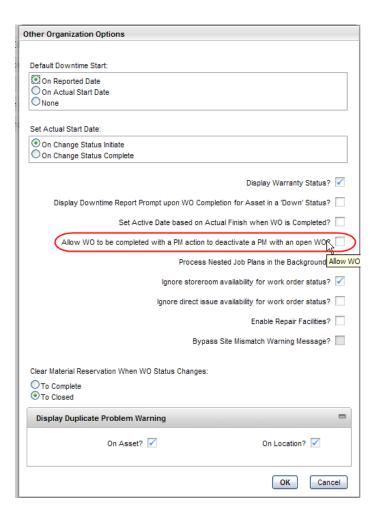
As a maintenance planner I want any open work orders that are associated with a PM, or Technical Record, that is 'deactivated' to be appropriately managed to ensure that regulatory and safety requirements are not compromised.

The Maximo ACM capability allows for PM Actions to be created associated with PMs that are subject to existing PM Actions, this can cause problems when an 'open' Work Order exists that is associated with a PM that has been deactivated by another PM.



# PM Enhancements - Manage Open Work Orders That Are Associated With Deactivated PMs

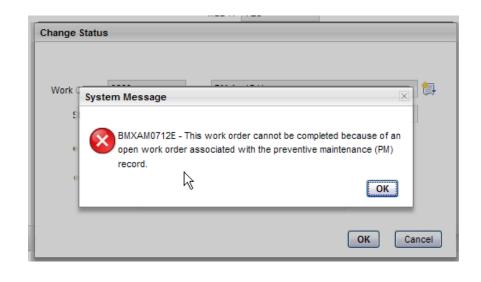
Added a new Maxvar that allows users to choose how they treat open Work Orders whose PM is going to be deactivated by a PM Action

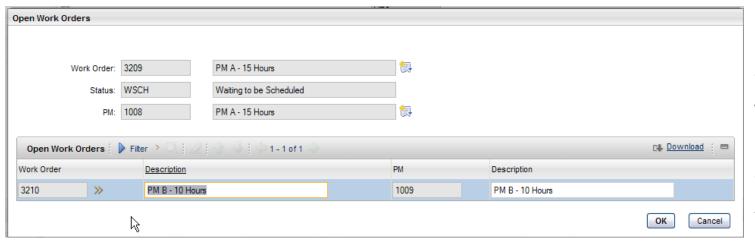




# PM Enhancements - Manage Open Work Orders That Are Associated With Deactivated PMs

If a Work Order is attempted to be completed by a Status Change and on completion it will deactivate a PM which has an open Work Order (and the maxvar is true) then the error message is displayed – the user will have to take action to resolve the situation before proceeding.





Dialog displays the open Work Orders that require action – once resolved the origination WO can be completed and the associated PM Action



# PM Enhancements - Allow Job Plan to be amended based on the selected Maintenance Location

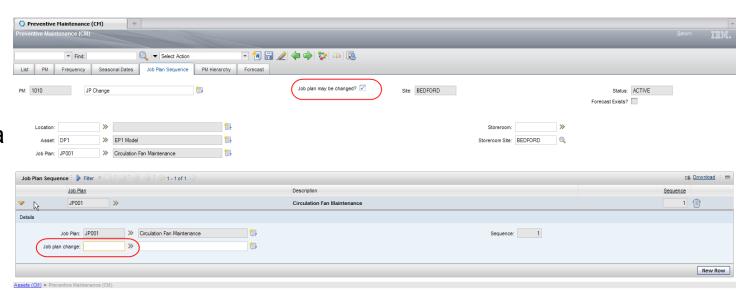
As maintenance planner I want to be able to amend the Job Plan associated with a PM at any point prior to the generation of associated work orders, so that changes in work execution can be accommodated dependent on work location.

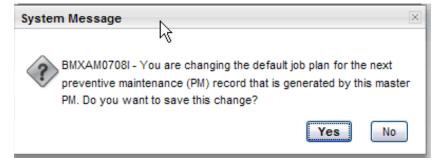
Client Example: a national rail operator utilises multiple maintenance locations for carrying out maintenance on the same locomotive types with identical maintenance frequencies, the maintenance processes are standardized as far as possible but there are a number of variances based on specific maintenance locations, e.g. resource differences. At a point prior to the asset arriving at the maintenance location the Job Plan associated with the PM is amended to select the correct Job Plan based on the maintenance location.



# PM Enhancements - Allow Job Plan to be amended based on the selected Maintenance Location

Added new flag for 'Job Plan may be changed' on Job Plan Frequency tab of PM – when true a new field 'Job Plan Change' is displayed – this allows an alternative Job Plan to be entered.





A warning is displayed to the user before the change is committed.

The Job Plan is for the next PM WO generation only – after completion it reverts to the original Job Plan.



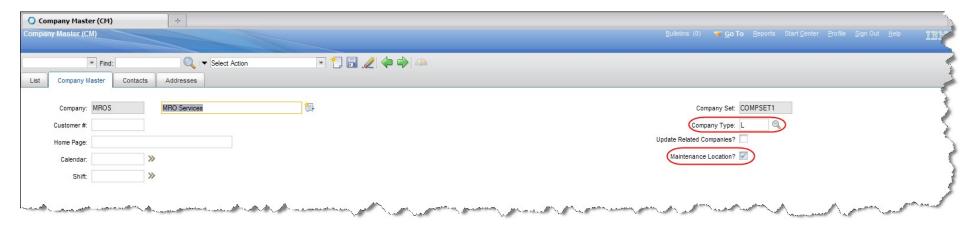
## **Slot Planning**

- The ACM 7.1.1 release introduced capability for Fleet Planning and Maintenance Forecasting. The 'Slot' planning capability extends and builds on this capability. The mobile and dynamic nature of typical ACM assets makes planning and scheduling of maintenance activities very complex as often the asset that had been planned for maintenance is not in the correct location at the correct time. This leads to logistical difficulties and inefficiencies as maintenance capacity (resources) are required to be utilised to their maximum extent in order to be efficient and competitive.
- To overcome this problem the maintenance location resources are defined as 'slots' (a defined capacity that is capable of performing specific maintenance activities on defined asset types) and the asset is only assigned to the slot when the degree of confidence is high of the asset being available to fill the slot.



## Slot Planning – Company Master (CM)

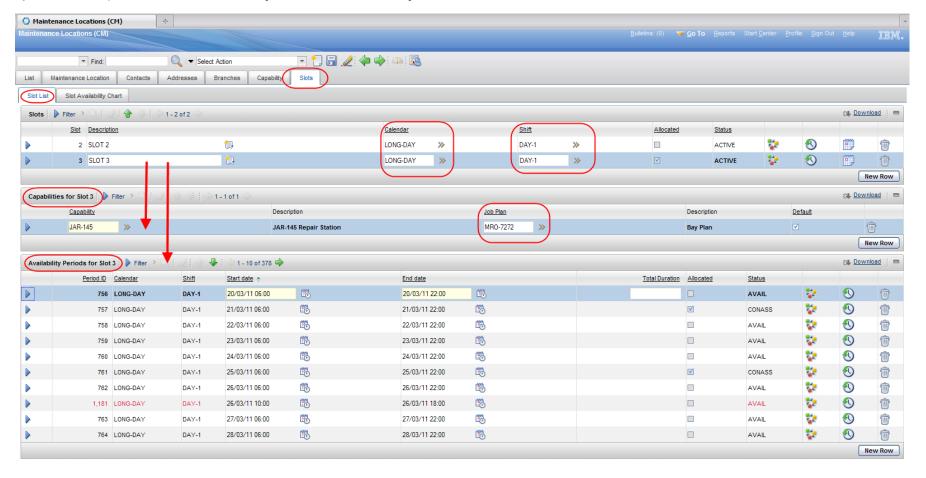
New clone of Company Master to define Maintenance Locations





## Slot Planning – Slots

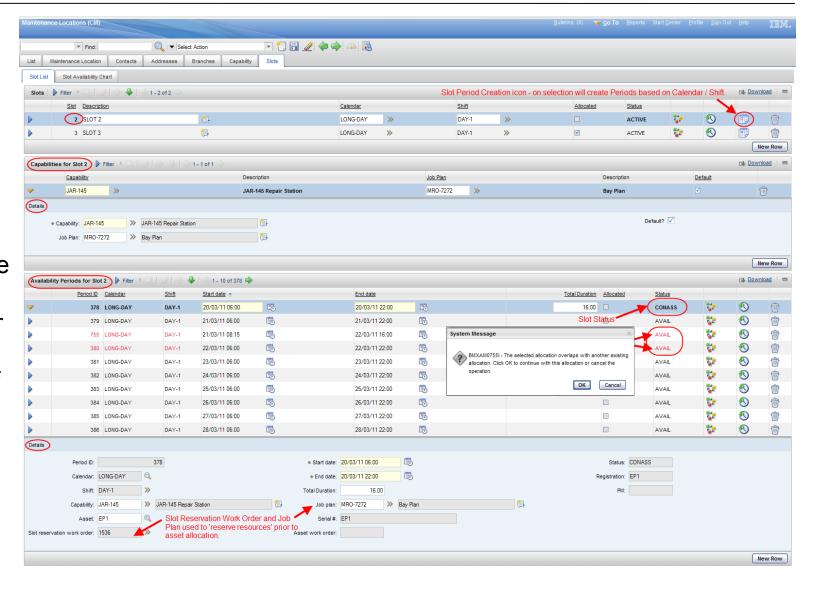
New capability to define 'maintenance slots'. Each Maintenance Location may be divided into 'Slots' (where maintenance may be performed), each Slot requires a Calendar and Shift to be associated, each Slot may have 'Capability' defined (where capability defines the 'approved' type of work that can be performed) and each Slot may have 'Availability Periods defined'.





## Slot Planning – Slots

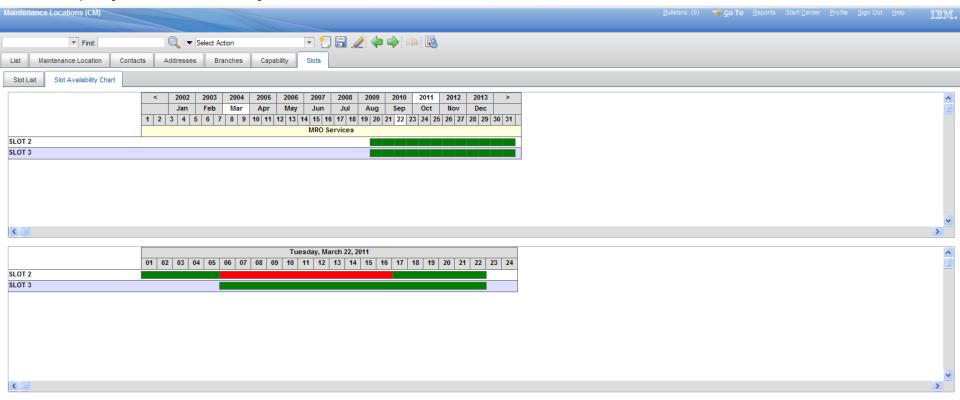
**Feature** highlights in red – the Slot Planning is also linked to the Maintenance **Planning** functions for the allocation of work





## Slot Planning – Slot Availability Chart

The Slot Availability Slot tab is a read only view of Slots, Availability Periods, Asset Allocations and allocation overlaps. It is designed to give the user a quick graphical view of the Slot availability status by selecting the required date – the display automatically refreshes on date selection.



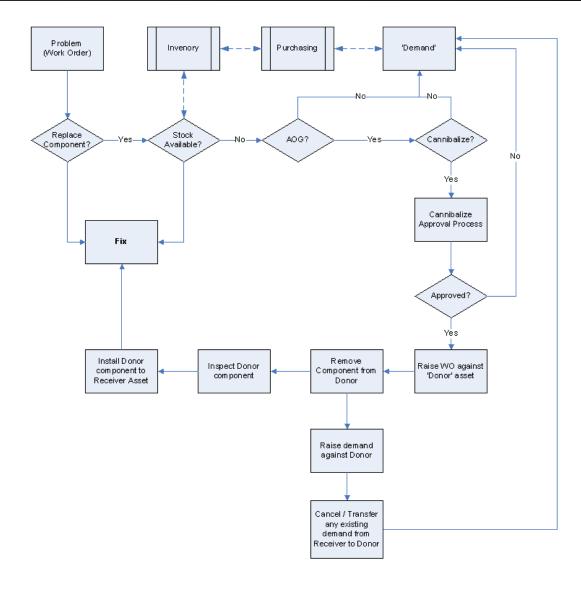


### Procurement - Cannibalization (Robbery) Process

In order to meet operational requirements and to despatch an asset (aircraft, train etc) it may be necessary to replace a defective component, this is normally achieved by issuing a replacement component from Inventory, installing it, completing the work and releasing the asset into service. However, there may be instances where there is zero balance available from inventory and the lead time to obtain a replacement from alternative sources exceeds the operational schedule requirements. In this case a cannibalization (robbery) may be authorised, this requires the required component be removed from a designated asset (the 'donor'), it is inspected and then installed on the unserviceable asset (the 'receiver') - once the work is completed the asset is then able to be despatched into service. A work order will have been raised against the 'donor' asset; this will be used to generate the demand against inventory in the normal manner. Any reservations that were made against the 'receiver' need to be cancelled or transferred to the 'donor'.



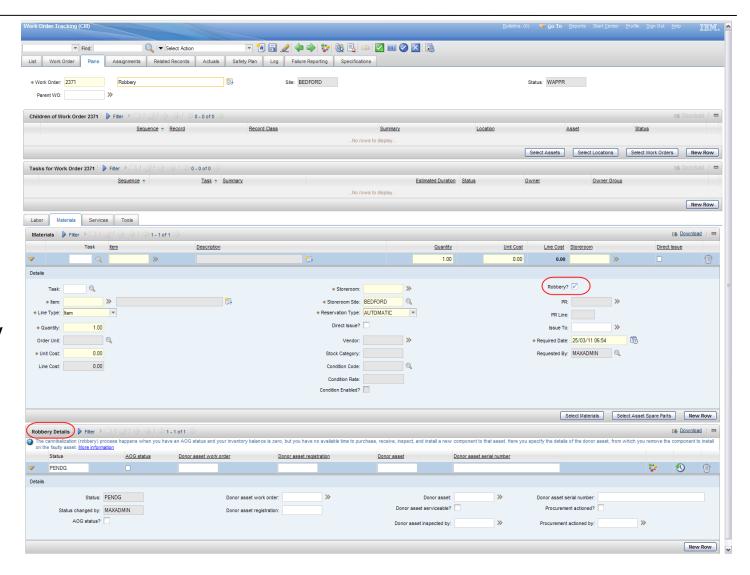
## **Procurement - Cannibalization Process**





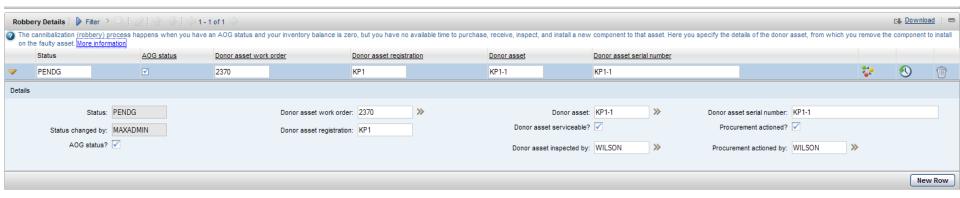
### **Procurement - Cannibalization Process**

The Work Order
Tracking (CM)
Plan / Materials
tab has a new
'Robbery' flag –
when true
dynamically
displays 'Robbery
Details)





#### Procurement - Cannibalization Process - Robbery Details



If a robbery (cannibalization) is required the 'Robbery Details' frame is displayed – the fields are used to define the details of the donor asset, work order, asset status and procurement action – the 'rob action' has a status associated with it to authorise the process.

A example Workflow has been created to support this process.

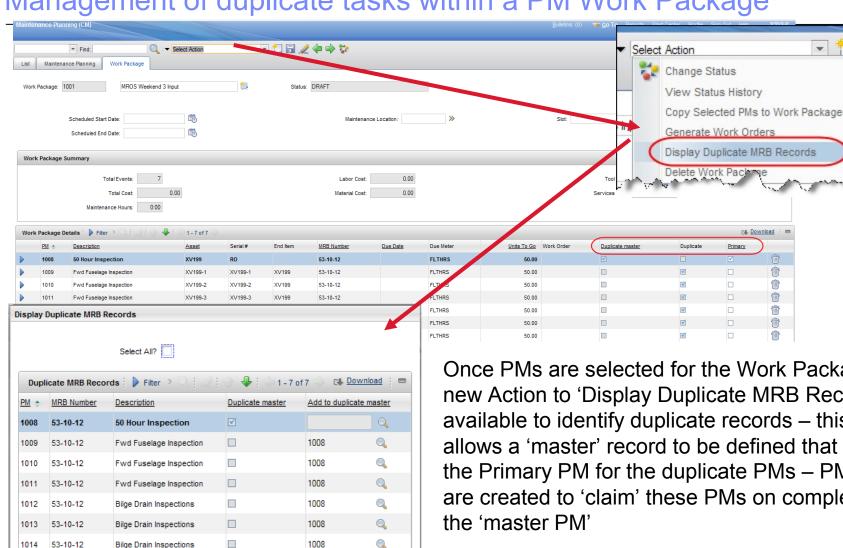


### Event Planning / Work Packaging – Part 2

- The ACM 7.1 release introduced capability for Event Planning (forecasting) and work packaging. It is intended to build on and extend this capability to identify and manage duplicate tasks (also known as suppression) within a selected package. This applies to PM records and occurs in both rail and aviation maintenance where identical maintenance requirements are called within a work package. By identifying and managing these duplicates the maintenance is carried out in a more efficient manner.
- The Log Book is also enhanced to allow Actions and Labor to be recorded against Log Book Problems



#### Management of duplicate tasks within a PM Work Package



OK

Cancel

1014

Once PMs are selected for the Work Package, a new Action to 'Display Duplicate MRB Records' is available to identify duplicate records – this action allows a 'master' record to be defined that acts as the Primary PM for the duplicate PMs – PM Actions are created to 'claim' these PMs on completion of

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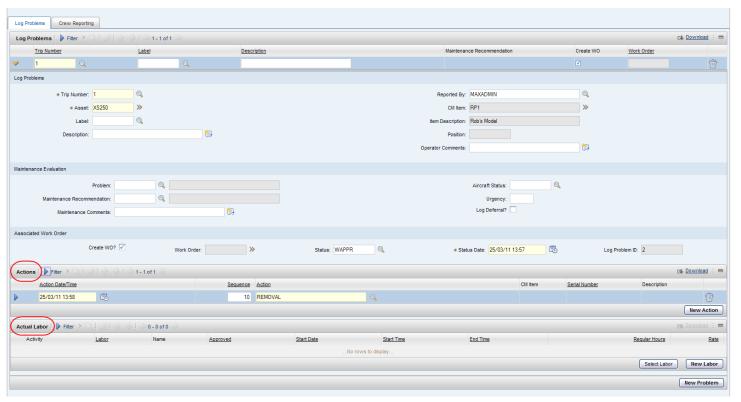
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## Log Book Enhancements

The Log Book has been enhanced to allow for 'Actions' to be defined against a Log Problem, where an 'action' may be a asset 'removal' or 'installation' – this uses the capability developed for Events Management.

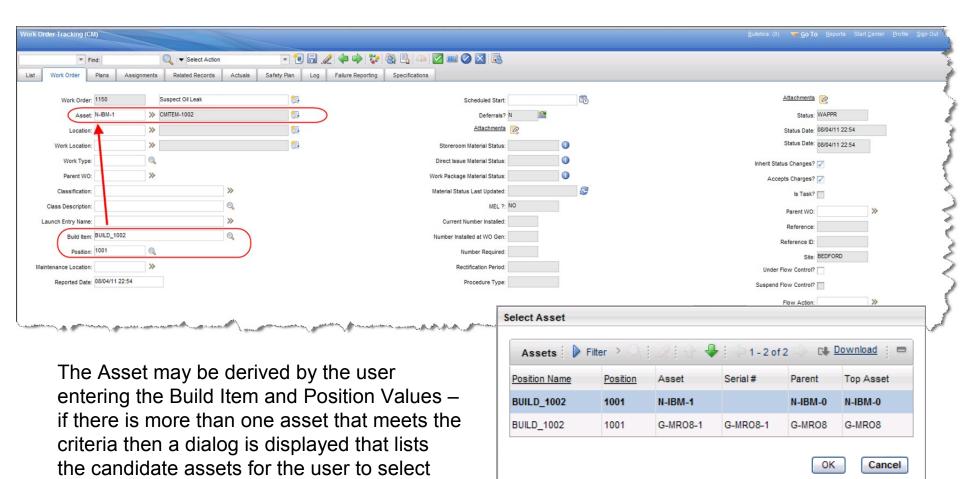
It is now also possible to add Actual Labor records against the Log Problem.



These enhancements support the requirements for 'first line' operations



### Deriving Asset in Work Order Tracking (CM)



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from.



#### Performance Enhancements

- Maximo Asset Configuration Manager (ACM) is designed to manage the configuration management requirements of complex assets operating in the aerospace, defence and rail sectors where safety and regulatory compliance is of primary importance. An integral part of Maximo ACM is the Build Data Interpreter (BDI).
- At the most basic level the BDI analyses configuration managed Assets position by position to ensure that they comply with the configuration rules established in the corresponding model.
- The BDI has been the focus of the performance enhancements, in addition there has been a review of indexing and code optimisation.



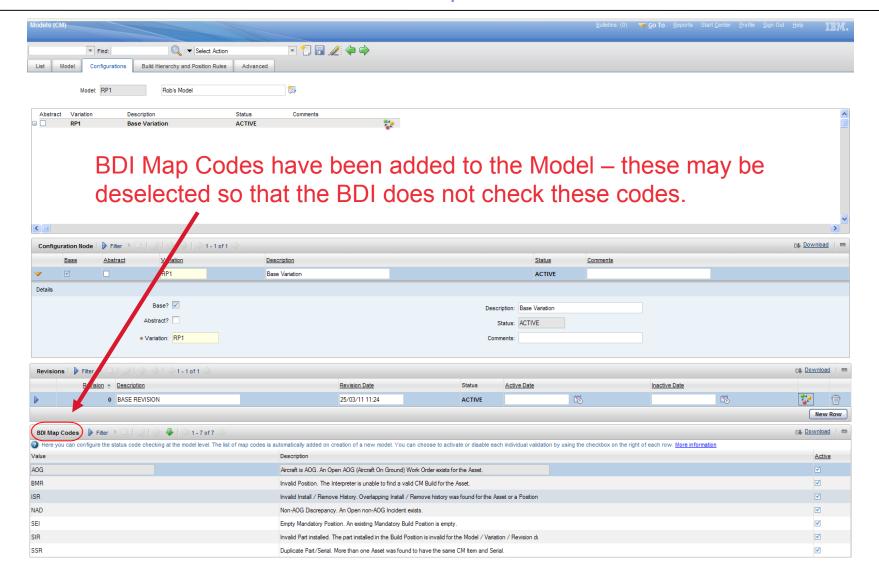
#### Performance Enhancements - BDI

#### The following items have been enhanced relating to the BDI performance

- Single Variant Processing
  - The BDI Status Dialog has been enhanced to enable the 'Update Map' feature to be executed for the current configuration or all variations.
  - The BDI Status Dialog has been enhanced to allow individual variations to be processed independently (a icon has been added adjacent to each variation)
  - A new Crontask parameter has been developed for 'ProcessMode' with possible values of 'ALL' or CURRENTCONFIG' to all BDI Crontasks (Continuous, End Item, Sub Assembly). Simultaneous BDI Processing and BDI Status Visibility
  - The BDI has been enhanced to allow multiple instances of the Continuous, End Item and Sub Assembly CronTasks to be launched in parallel.
- The system has been enhanced to ensure the BDI is prevented from running for the same Asset simultaneously.
  - Developed intelligence into the BDI transaction queue to prevent more processing than is necessary.
  - Created new application (BDI Queue Status) to provide the end user visibility of the status of Assets scheduled for processing.
- Configurable MAP Codes
  - The Model application has been enhanced to allow the user to define which BDI Map Codes are applicable to the Model.
- Configurable Maintenance Plan Processing
  - A check box has been added to the BDI dialog that when false disables the BDI map code for maintenance plan processing.
- Configurable Node Level Processing
  - The Model Build Hierarchy and Position Rules tab / Position List has been enhanced to include a check box that when true disables BDI map processing against the selected node and all of its children.
- BDI Status History Maintenance
  - A new Maxvar has been developed (Organizations (CM)) / System Settings that when false will BDI historical data to not be retained. By default the setting is set to true.



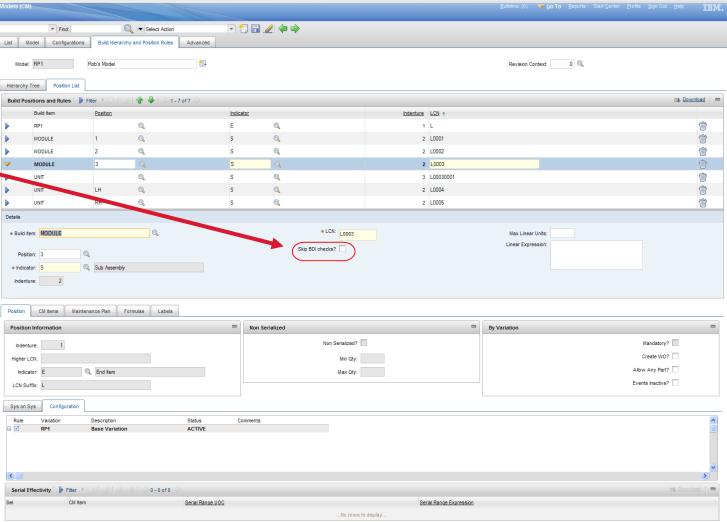
#### Performance Enhancements – BDI Map Codes





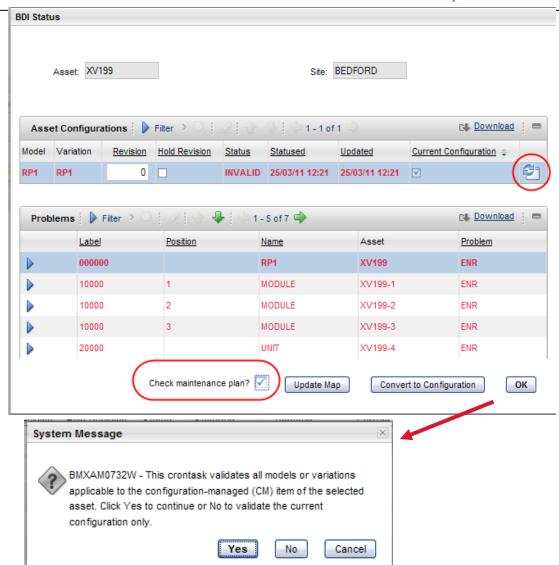
#### Performance Enhancements – BDI Map Codes

**Build Hierarchy** nodes may be flagged for 'Skip BDI Checks' - this means that the BDI will not run against the selected node and any children associated with the node.





#### Performance Enhancements – BDI Map Codes

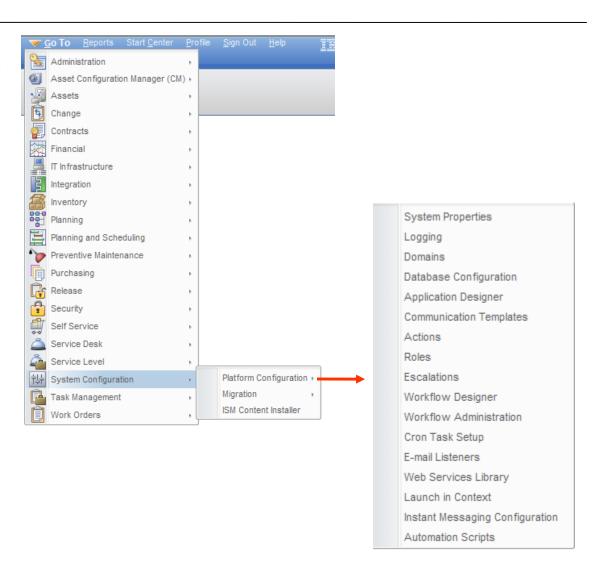


For the manual BDI a 'Check Maintenance plan?' flag has been added, this is true by defalut. When made false the BDI will not check the maintenance plans for the selected variation – this can be a significant performance saving.



#### Configure

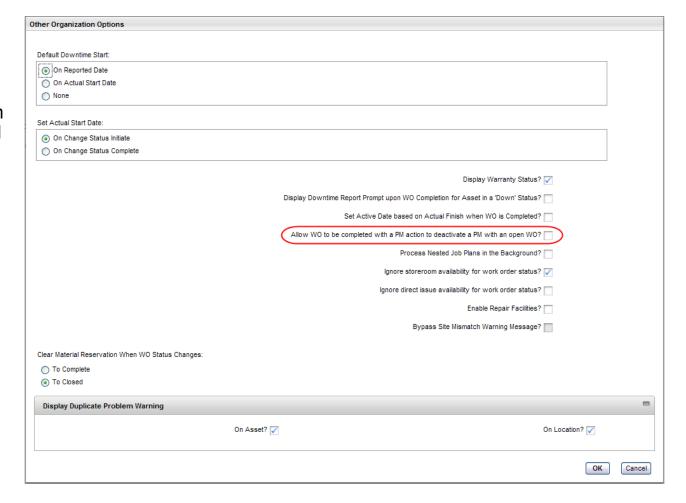
- Maximo ACM can be configured using the 'standard' System Configuration tools
- There are a number of specific ACM variable settings – described on following slides





### Configure – Other Organization Settings

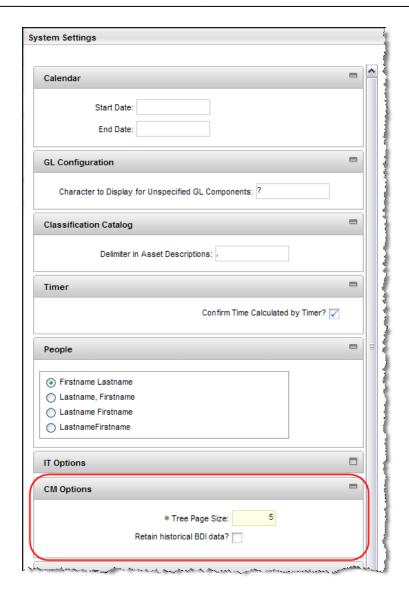
Allows user to choose how they will treat Work Order completion in the situation where its completion will deactivate a PM that has an open work order associated with it.





#### Configure – System Settings

- Allows user to:
  - Set the 'Tree Page Size this is the vtree hierarchy used in the Model and Assets (CM) applications.
    - NOTE: 7.5.0.1 negated the need for this setting as the v-tree is now configured via the xml
  - 2. Choose if historical BDI data is to be retained





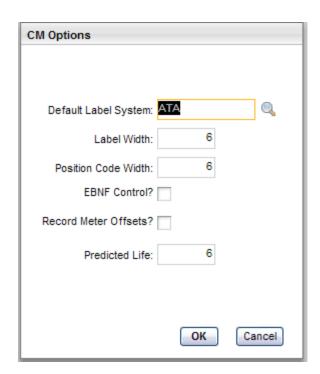
#### Configure – CM Options

#### Allows user to:

- 1. Set the Default Label System that is associated with the Model
- Define the Label and Position field widths

NOTE: 7.5.0.1 negated the need for this setting as the v-tree is now configured via the xml

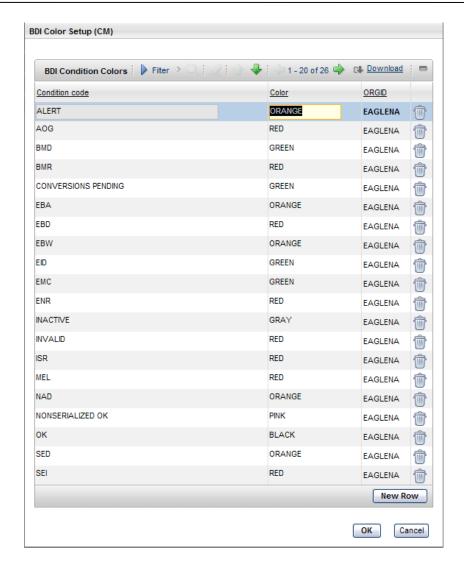
- Activate the use of EBNF controls (Extended Backus–Naur Form) – a specific rule type.
- Activate meter offsets meter readings entered during asset install / remove process
- Set the number of meter readings that will be used to calculate predicted life values





#### Configure – BDI Color Setup (CM)

 Allows user to set which colours will be used for specific BDI mapping codes – these colors are dispalyed in the Assets (CM) V-tree and BDI Status dialog window.





### **ACM Reports**

Report File Name	Description	Application	Report Folder	Report	Comments
				Type	
plusaasset_mel.rptdesign	Asset (CM) - MEL Report	PLUSAASSET	PLUSAASSET	BIRT	Details of Assets with MEL (Minimum Equipment List) records
plusaasset_reliability.rptdesign	Reliability Report	PLUSAASSET	PLUSAASSET	BIRT	Reliability based on Log Problems
plusaasset_events_details.rptdesign	Events Details	PLUSAASSET	PLUSAASSET	BIRT	Events Management related
plusaasset_life_remaining.rptdesign	Life Remaining Report	PLUSAASSET	PLUSAASSET	BIRT	Life remaining to maintenance event
plusaasset_life_remaining_detail.rptdesign	Life Remaining Detail Sub Report	PLUSAASSET	PLUSAASSET	BIRT	Life remaining to maintenance event - details
plusaasset_life_usage.rptdesign	Life Usage Report	PLUSAASSET	PLUSAASSET	BIRT	Life usage of asset
plusaasset_life_usage_trace.rptdesign	Life Usage Trace Sub Report	PLUSAASSET	PLUSAASSET	BIRT	Life usage of asset - details
plusaasset_bdi_status.rptdesign	BDI Status Report	PLUSAASSET	PLUSAASSET	BIRT	Asset BDI Status
plusaasset_bdi_narrative.rptdesign	BDI Narrative Sub Report	PLUSAASSET	PLUSAASSET	BIRT	Asset BDI Status - details
plusacm_mel.rptdesign	Model - MEL Report	PLUSACM	PLUSACM	BIRT	MEL Rules by Model



### Questions?











