

Maximo Scheduler – New Capability Update

Scheduler 7.6.8

GoMaximo 2022

Tom Peterson



About the Presenter – Tom Peterson

- A Computer Engineer and IBM Certified Deployment Professional with over 11 years of Maximo development and database experience based out of Alberta, Canada.
- Worked with clients mostly in the Oil and Gas industry on numerous Maximo Projects involving clients in Canada, United States, and the Middle East.

Questions on Maximo? Email: Tom.Peterson@cohesivegroup.com

Agenda

- Scheduler Product Offering / Licensing Updates.
- New Additions in 7.6.8
- Demo
 - Planning and Scheduling Best Practice
 - Overview of existing and new features
 - How does it all work together?

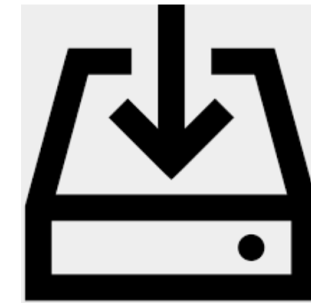
Product Offering and Pricing

- Scheduler and Scheduler Plus are now a singular unified offering.
- Users with access to scheduler are considered Base Users (10 AppPoints per concurrent users)
- Scheduler Optimization
 - separate tool / separated installation
 - Entitlements included with AppPoints.

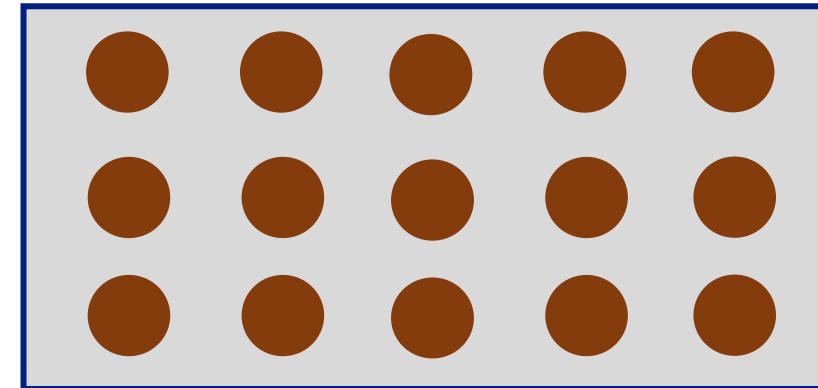
Concurrent application users

Installs

Users Draw AppPoints from entitlement pool



Some deployed offerings require dedicated AppPoints from the entitlement pool



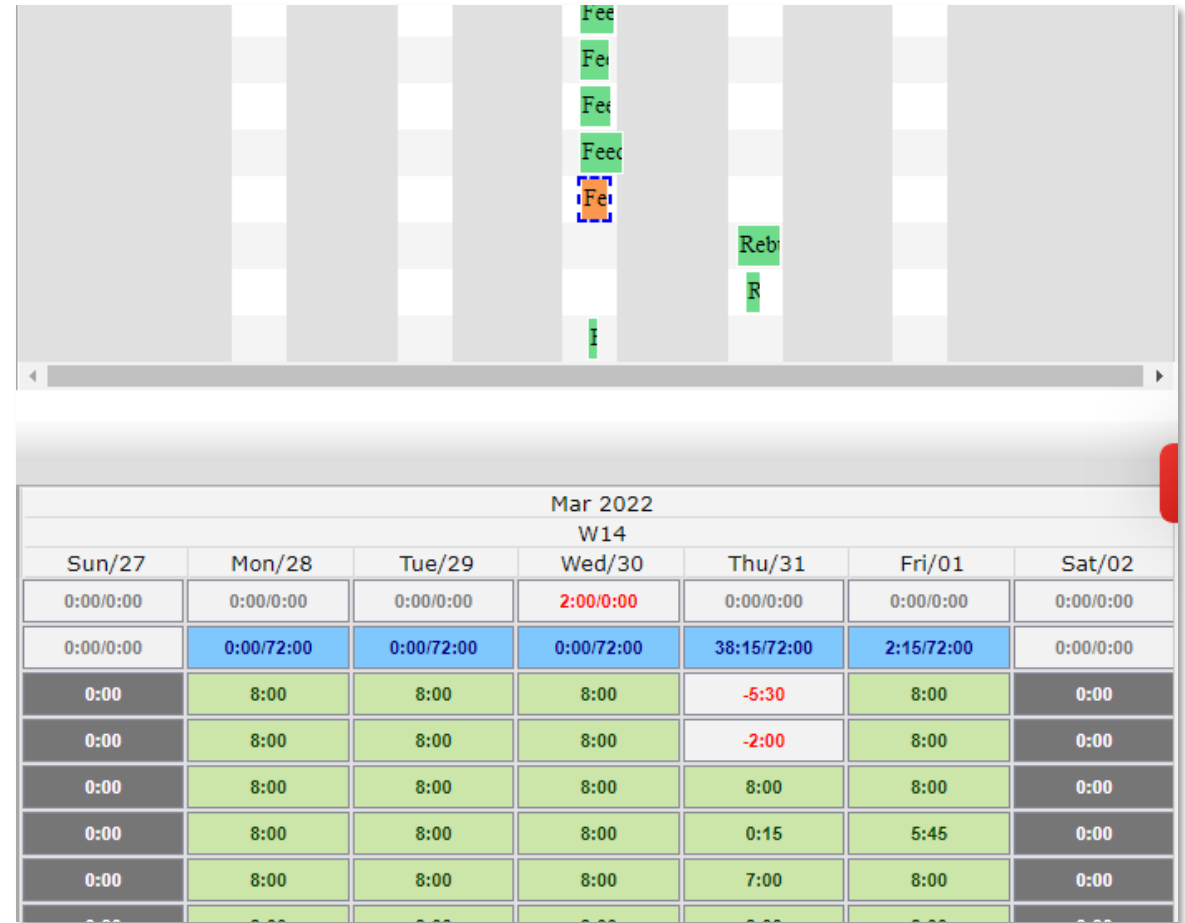
New Features

- Graphical Work Week
- Scheduler Data Manager
- Graphical Resource View
- Graphical View Enhancements
- In Line Editing
- Exporting Assignment Calendars



Graphical Work Week (GWW)

- Manage resources on a weekly basis
- Schedule dates created by Graphical Assignment (GA)
- Graphical View displays scheduled work and shifts in week increments
- Create upcoming work list to assign to labor and crews
- Modify resource availability
- Reschedule work



Scheduler Data Manager

- Validate Schedule/Work List data before scheduling and assigning work to ensure better scheduling results
- Can enter directly from Graphical Scheduling, Graphical Assignment, and Graphical Work Week
- Troubleshoot data validations
- Correct or exclude records with scheduling errors (ex: no planned labor, incompatible scheduling window, etc.)
- Does not evaluate PM records – only work records, dependencies, and required resources

The screenshot displays the Scheduler Data Manager interface. At the top, there are navigation tabs: List View, Schedule, Calendar, Queries, Work, Dependencies, and Resources. The 'Work' tab is active. Below the tabs, the 'Schedule:' dropdown is set to 'TP_1' and 'Tom's Schedule'. A 'Selected Validation Date:' field is present. A series of validation checkboxes are shown, all of which are checked: Zero Duration?, Non-interruptible Work that is Longer than Shifts?, Interruptible on Missing Shift?, Start No Earlier Than?, Finish No Later Than?, Milestones?, Location Assignment?, No Planned Resource?, Priority?, Task without Parent?, Craft Quantity?, and Crew Type Quantity?. Below these are buttons for 'Validate Work' and 'Show All Work Errors/Warnings'. A 'Filter By Error/Warning:' dropdown is set to an empty state, and a 'Show Errors/Warnings Only?' checkbox is unchecked. The main area shows a table of work items with columns for WO Group, Task, Description, Duration, Start No Earlier Than, and Finish No Later Than. The table contains 9 rows of data, with the first row highlighted in yellow.

WO Group	Task	Description	Duration	Start No Earlier Than	Finish No Later Than
1002	10	Check pump operation.	8:00		
4200	10	Check pump operation.	0:20		
4200	20	Check pump float switch.	0:30		
4200	30	Check housing for leaks.	0:10		
4200	50	Replace contactor & clean contactor co	1:00		
4200	60	Inspect inpeller for wear	0:10		
4200	70	Record amperage and voltage with mot	0:15		
4200	90	Inspect main disconnect and all electric	0:15		

Graphical Resource View

- Manage resource hours over one-week or one-month
- View scheduled work time per shift and modified availability in single view
- Total resource hours by craft and assignment record access
- Modify availability
- View rotating shift patterns

← List View Resource Graphical View							
Quick Filter NON-WORK Full Day							
<input type="checkbox"/> Description							
Mar 2022 - Apr 2022							
W14							
	27	28	29	30	31	1	2
<input type="checkbox"/> Electrician	0	56	56	56	56	56	0
<input type="checkbox"/> Allan Ball	-	W	W	W	W	W	-
<input type="checkbox"/> Christine Horn	-	W	W	W	W	W	-
<input type="checkbox"/> Jim Gormley	-	W	W	W	W	W	-
<input type="checkbox"/> Mike Pedrick	-	W	W	W	W	W	-
<input type="checkbox"/> Mike Wilson	-	W	W	W	W	W	-
<input type="checkbox"/> Roland Smith	-	W	W	W	W	W	-
<input type="checkbox"/> Steve Calcott	-	W	W	W	W	W	-
<input type="checkbox"/> Tom Reynolds	-	W	W	W	W	W	-
<input type="checkbox"/> Tom Rontiris	-	W	W	W	W	W	-

Graphical View Enhancements

- Refreshed user interface increases work scheduling/assignment
- Toolbar buttons:
 - Zoom – view work for a specific time, or view Job Plans and tasks in greater detail
 - Refresh – update schedule with changes made to Work Orders
 - Filter – search for specific data within the schedule
- Sort columns to change the order data appears
- Record movement – individual and group
- Modify durations and start/finish dates with a mouse drag

Inline Editing of Graphical Scheduling

- Description
- Duration
- Milestone
- Interruptible Shift
- Supervisor
- Prevents having to return to WO Tracking for edits

	1	2	3	Description	Resources	Duration	Start Date
				- Work Orders			3/30/22 10:23 AM
				HVAC overheating	Construction Worker(1)	2:00	3/31/22 10:23 AM
				HVAC overheating	Construction Worker(1)	2:00	3/30/22 10:23 AM
				HVAC overheating	Construction Worker(1)	2:00	3/30/22 10:23 AM
				+ <input type="text" value="Feedwater Pump Service"/>		7:57	3/31/22 7:00 AM
				- Annual Pump Maintenance	Mechanic(1)	38:45	3/30/22 2:00 PM
				Check pump operation.		0:20	3/30/22 2:00 PM
				Check pump float switch.		0:30	3/30/22 2:00 PM

Exporting Assignment Calendars

- Additional Scheduler Reporting Functionality
- Download or receive via email
- Keeps a separate record of calendars
- Decide:
 - Start Date
 - Duration
 - Method (email or download)

Reporting

Page of 4

Graphical Assignment Labor Daily Format

Work List:
Labor: HORN

April 1, 2022

7:00:00 AM	
7:30:00 AM	
8:00:00 AM	
8:30:00 AM	
9:00:00 AM	
9:30:00 AM	
10:00:00 AM	WO: 1002 Task ID: null Description:Rebuild Feedwater Pump Asset:11450 Location:BR450 Est Dur:8
10:30:00 AM	
11:00:00 AM	
11:30:00 AM	
12:00:00 PM	
12:30:00 PM	
1:00:00 PM	
1:30:00 PM	
2:00:00 PM	
2:30:00 PM	
3:00:00 PM	

3/25/22 5:29 PM

Compliance Definitions

Scheduler can calculate and track two key time-phased work performance metrics:

Labor Hour Compliance Factor

- The ratio of actual hours posted to planned work in the compliance period to the total number of planned hours at the start of the compliance period.

Work Order Compliance Factor

- The ratio of planned work orders completed in the compliance period to the total number of planned work orders at the start of the compliance period.

Compliance Components

- Scheduler Compliance tab
- Header information about the period's start and end
- Manual actions to process a start and finish
- Table of historical compliance periods
- Line chart of the 2 data trend lines over the periods
- Scheduler Dashboard tab
 - Pie charts of the two main metrics for a selected period
 - Labor Hour Compliance
 - “Unplanned Hours” is $(1 - (\text{labor hour compliance}))$ as a percentage
 - Work Order Compliance
 - Stack chart of Schedule Compliance record counts
 - Plan Work Records
 - Break-in Work Records

Break-out Work Records

Compliance Calculations

- “Planning Set” – APPR work orders in the period at period start
- Labor Hour Compliance
 - Actuals posted to work orders in the planning set / total work plan labor hours of the work orders in the planning set
- Work Order Compliance
 - Number of completed work orders from the planning set / total work orders in the planning set
- Break-in Work
 - Approved work orders inside the compliance period at period end, that were not in the planning set.
- Break-out Work
 - Work orders from the planning set that are not in the compliance period at period end. Cancelled work orders are considered break-out work.

Compliance Advanced

- Cron tasks for compliance start and end
 - SkdComplianceStartCronTask – schedules recurring period starts
 - SkdComplianceEndCronTask – Schedules recurring period ends
- Allows Compliance to be calculated automatically, e.g. every week without user or admin intervention.
- For example, if the planning meetings are from 6-7AM every Monday, resulting in a committed weekly schedule, the start cron might be set up to run Mondays at 8:00AM. If all completions and actuals are to be posted by 5:00PM every Friday, the end cron could run on Fridays at 6:00PM.

Compliance Best Practice

- Save and commit a schedule after any edits and prior to starting or finishing a compliance period.
- Double-check the schedule and actual hours posted before finishing the compliance period. An incorrect compliance period can be deleted, but since it already took place it cannot be regenerated.
- Choose and stay with a consistent treatment of closed and cancelled records. By default, closed records count toward compliance the same way as completed; cancelled records count as break-out work.
- Use snapshots or manual scenarios to save a picture or copy of the approved committed schedule at the start of a compliance period. This provides another useful reference of results after the fact.

More Information



Tom Peterson



Tom.Peterson@cohesivegroup.com



cohesivegroup.com

Request a Complimentary Maximo Assessment

A Maximo Assessment increases the effectiveness of your system usage and identifies areas for improvement.

