

Breakout Session 1A

Optimal configuration of the Work Order Module to support scheduling

Session leaders

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Work Order Configuration to support Scheduling

Breakout Session Objectives

- **Evaluate and discuss what is required to develop schedule**
- **Review how Maximo 6.x is configured to meet schedule requirements**
- **Determine what is the best approach for developing schedules from data in the work order module.**

Work Order Configuration to support Scheduling

Evaluate and discuss what is required to develop schedules for Maintenance

- **Written Scheduling Process for routine, outage, modifications/construction or capital work**
- **Value lists for work type & sub work type**
- **Clear definition for work order status**
- **Flow diagrams that show the flow of work and status changes including who and when for status changes**
- **Backlog reports that support scheduling**

Work Order Configuration to support Scheduling

Work Order Status requirements and definitions for:

- **Work Request**
- **Waiting for Planning**
- **Planned**
- **Waiting for schedule**
- **Scheduled**
- **In progress**
- **Completed**
- **Waiting for Materials/conditions/funding/etc**

Work Order Configuration to support Scheduling

All scheduling selection is from a ready-to-work backlog

- **Work Order Status is key**
- **Priority of work order and asset is required to perform high value work**
- **Work type is necessary to evaluate or filter what and when work is scheduled**
- **Lead Craft/Supervisor or Work Group is required for work assignment**
- **Work Order labor estimates and duration need to be on the work order/work plan in order to build schedule**

Work Order Configuration to support Scheduling

Use of Scheduling date information from the work order

- **Target start date**
- **Schedule start date**
- **Actual start date**

Discuss where and how these dates are populated

Work Order Configuration to support Scheduling

What is actually scheduled

- **Labor resources**
 - Craft by craft code
 - Crews if used
 - Maybe supervisors
 - Contractors if in the database????
- **Materials**
 - Stocked, non-stocked and purchased
- **Service Items**
- **Tools – must be listed in Stocked tools**

Work Order Configuration to support Scheduling

Discuss scheduling approaches using Maximo:

- **Weekly, monthly and longer**
- **Outage scheduling**
- **Modification or Construction Scheduling**
- **Administrative such as training, functions, activities, etc.**

Work Order Configuration to support Scheduling

Summary of Configuration requirements

- **Proper set up WO status**
- **Proper use of Priorities**
- **Appropriate definition of work types**
- **Labor and craft codes, crews or supervisors**
- **Complete Job Plans and work plans that include labor, materials contracts, and/or tools**

Work Order Configuration to support Scheduling

Maximo 6.x

Live demo