Using Maximo’s Master PM’s and PM Hierarchies
Presenter: Craig Mackenzie

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About the presenter: Craig J Mackenzie

Craig is a Maximo Certified Consultant with over 10 years of implementation experience. Craig’s focus is primarily on the project management, best practice consulting and solution architecture for medium and large Maximo solutions in North America, Europe and Asia. Craig has delivered Maximo solutions to the Oil & Gas, Mining, Pulp & Paper, Transportation, Facilities Management, Manufacturing, Government and Healthcare industries.

Questions on Maximo or the content of this webcast? Contact Craig directly at:

   Email: cmackenzie@ontracksconsulting.com    Phone: 780-328-2593
Agenda

• Master PM’s, PM Hierarchies and Routes
• Master PM’s – Usage & Examples
• PM Hierarchies – Usage & Examples
• Routes – Usage & Examples
• Live Demonstration
  • Creating /Updating Master PM’s
  • Creating and Generating PM Hierarchies
Usage / Definitions

- **Master PM** – Used to control or update PM records. When used with a “Rotating Item” the PM can create PM records for all equipment associated with the item.

- **PM Hierarchy** – Used to group PM’s into Parent-Child relationships. When the PM Hierarchy is generated the same Parent-Child relationships will be maintained for the work orders generated.

- **Route** - A route is a list of related assets or locations. A route generates a Work Order Hierarchy.
“Author Rules”

• PM Hierarchy
  • Used to manage larger projects with multiple assets/locations
  • Used to generate a structure where work order can be assigned to various groups, departments and/or individuals

Examples:
✓ Shutdown / turnaround “template”
✓ Motor rewind
PM Hierarchy

PM#1001 – Motor Rewind
  PM#1002 – Disconnect Motor
  PM#1003 – Rewind Motor
  PM#1004 – Reconnect Motor

WO#1234 – Motor Rewind
  WO#1235 – Disconnect Motor
  WO#1236 – Rewind Motor
  WO#1237 – Reconnect Motor

PM Hierarchy Generates

Maximo rules:
✓ Master PM’s cannot be added to a PM Hierarchy
✓ PM’s in a PM hierarchy cannot be deleted
“Author Rules”

• Routes
  • Used to generate a checklist for a large number of asset.
  • Work or procedure is relatively quick
  • Work history is required for each location/asset on the route

Examples:
✓ Fire extinguisher inspection
✓ Lube route

Will be the topic of another webcast
“Author Rules”

• **Master PM**
  • Large number of similar assets requiring the same preventive maintenance activities.
  • A large number of PM’s where there are benefits in controlling them together for operations reasons.

  **Examples:**
  ✓ 50 identical motors or pumps
  ✓ A section of the plant with varying operating seasons
Master PM’s – Two methods

Method #1 – Controlling PM’s

Master PM
Can control:
• Frequency
• Job Plan
• Seasonal Dates
• Job Plan Sequence

PM #1
PM #2
PM #3
PM #4
PM #5
PM #6

All associated PM’s are controlled by the Master PM
Master PM’s – Two methods

Method #2 – Controlling an Item

Master PM
Can control:
• Frequency
• Job Plan
• Seasonal Dates
• Job Plan Sequence

Item

Example
Sulzer Pump
60 GPM

Pump #1
Pump #2
Pump #3
Pump #4
Pump #5
Pump #6

PM #1
PM #2
PM #3
PM #4
PM #5
PM #6

The Master PM creates and controls the associated PM’s
Demonstration

1. Creating & Generating a PM Hierarchy
2. Creating & Updating Master PM’s