



# Cohesive Information Solutions Inc.

## Maximo Scheduler V7.5 Primer

July 20, 2012



# Presenting Today

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# Maximo Scheduler V7.5

## What is it?

- Add on Maximo application
- Gives planners and schedulers the ability to view Work Orders, Activities and PM Forecasts graphically in a Gantt chart
- Work and Activities (Tasks) can be scheduled by dragging, using CPM, or manually
- Provides the ability to compare Resource load with Craft availability
- Works with Maximo 7.1.1.5 or greater

# Maximo Schedule V7.5 Tabs

- **List**: Used to see a list of all Schedules
- **Schedule**: Used to create and define a Schedule and the definition of Work data for scheduling. It also specified how the data is displayed in the Gantt View
- **Gantt View**: Used to view and graphically edit the Schedule in Gantt chart view



Find: [ ] Select Action [ ]

- List
- Schedule
- Gantt View

Schedule:

Calendar:  >>

Shift:  >>

Organization:

Start Date:

Public?

Preserve Existing Records On Refresh?

Last Saved Date:

Last Committed Date:

Created By:

Created Date:

Attachments

Preserve Schedule Start Dates?

Refresh When Opening Gantt View?

Work Queries Go Here

Work Queries Filter > [ ] [ ] [ ] [ ] 1 - 1 of 1 [ ] Download [ ]

Data Source	Query Name	Description	Where Condition
<input type="text" value="WORKORDER"/>	<input type="text" value="ML Test1"/>	<input type="text" value=""/>	<input type="text" value="assetnum='Playhouse'"/>

Additional Resources Go Here (if any)

Additional Resources Filter > [ ] [ ] [ ] [ ] 1 - 1 of 1 [ ] Download [ ]

Resource Availability Filter > [ ] [ ] [ ] [ ] 1 - 1 of 1 [ ] Download [ ]

Data Source	Query Name	Description	Where Condition
<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>

Find:  Select Action

List Schedule **Gantt View**

**Toolbar**

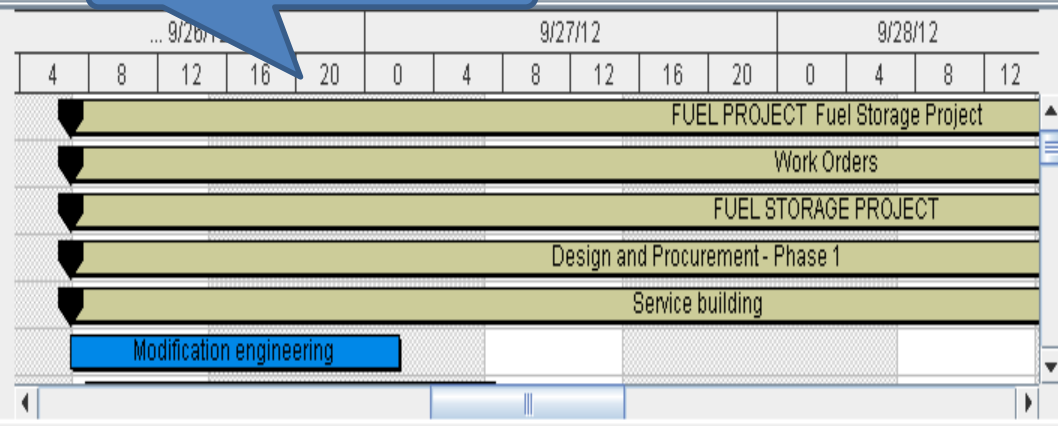
Description Filter  Sort by the Default V...

Print Activity Chart  Print Resource Chart

**Activity Table**

Work	Task	Description	Start Date	End Date
		FUEL PROJECT Fuel Storage Pro...	9/26/12 6:5...	9/29/12 10:...
		Work Orders	9/26/12 6:5...	9/29/12 10:...
7000		FUEL STORAGE PROJECT	9/26/12 6:5...	9/29/12 10:...
7100	100	Design and Procurement ...	9/26/12 6:5...	9/29/12 8:0...
7110	10	Service building	9/26/12 6:5...	9/29/12 8:0...
7111	1	Modification en...	9/26/12 6:5...	9/27/12 2:1...

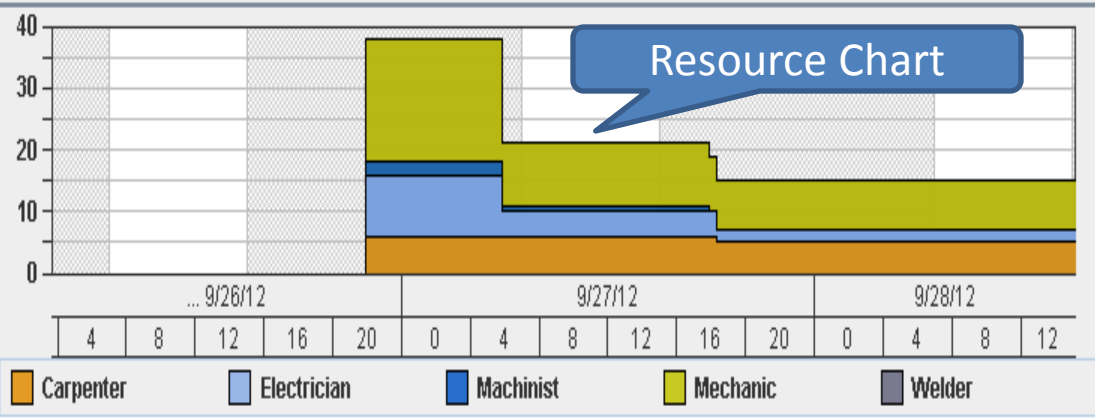
**Activity Chart**



Resource	Description
	Fuel Storage Project
	Crafts
CARP	Carpenter
ELECT	Electrician
MACH	Machinist
MECH	Mechanic
WELD	Welder

**Resource Table**

**Resource Chart**



# Working with the Time Line

## Toolbar Zooming



Zoom in



Zoom out



Zoom to Fit

## Click to Zoom

- Double Click on a Year zooms to the 12 months in that year
- Double Click on a Month zooms to the 4 weeks in that month
- Double Click on a Week zooms to the 7 days in that week
- Double Click on a Day zooms to the 24 hours in that day
- Double Click on an Hour zooms to 5 minute intervals in that hour
- Double Click on a 5 Minute Interval zooms to those minutes
- Specific time slice... click once on the timeline, double-ended arrow appears. Click an end point and you zoom to the time slice.

# Calendar and Shift Considerations

- Schedules with no Calendar or Shift information assumes Work can be performed 24x7x365 and that unlimited Resources are available
- Schedules with no Calendar or Shift information make no distinction between Interruptible and Uninterruptible work in the Gantt Chart
- Schedules with Calendar and Shift information handle Interruptible and Uninterruptible Work differently:
  - Interruptible Work is scheduled to be performed during working hours only
  - Uninterruptible Work is schedule for the first available time on the schedule and continues until finished.






# Time Zone Considerations



- Work records are shown in the local time zone of the user. Use a Calendar and Shift where the work will be performed.
- PM's Forecasts are shown with a start time of 12:00 am regardless of the time zone of the user.

# Gantt Chart Bar Legend

Color Bars for Work/Activities can reflect Status or Priority

The default is to show bar colors based on Status







Color	Work record status
	WAPPR
	APPR, INPRG, WSCH, WMATL, WPCOND
	COMP, CLOSE, CAN

Color	Work record priority
	1 - 5
	6 - 10

Bar colors as set in the **skdviewer.properties** file.

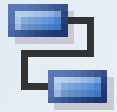
If you want the color of your work records to reflect their work priority, you can set the parameter `usestatuscolors=true` in the `skdviewer.properties` file.

# Default Gantt Chart Legend for PM's

Visual element	Description
	An orange line indicates the current date.
	Indicates a PM forecast segment that can be moved in the Gantt view.
	<p>Indicates a PM forecast segment that cannot be moved in the Gantt view. Forecast segments can be un-editable for the following reasons:</p> <ul style="list-style-type: none"><li>• The forecast is locked.</li><li>• The forecast segment is waiting reforecast.</li><li>• The forecast segment is not the first record in the forecast.</li></ul> <p>This color also indicates an overlap in forecast segments. For example, if a job plan duration spans several days, but the PM frequency is every day, the segments overlap in the Gantt view.</p>
	Indicates that the PM segment was edited.
	Indicates that no job plan duration is specified on the PM record, and so default duration of one hour shows in the Gantt view.
	Indicates that this forecast segment is waiting reforecast.

# Predecessor Relationships and Constraints

Predecessor relationships indicate when successor work records and tasks can begin to ensure that tasks are completed in a designated order.



Used to Insert a Constraint



Used to Delete a Constraint

Select a Constraint then Right-Click to Edit Constraint

Lead and Lag times can be specified

Date constraints are set in work order applications:

- Start No Earlier Than
- Finish No Later Than

Date constraints in the Gantt Chart appear as vertical dashed lines.

If you move the work to a date that conflicts with a constraint the color of the work record changes to red.

Relationship
Finish-to-finish
Finish-to-start
Start-to-finish
Start-to-start

# Critical Path Method (CPM)



Used to Perform CPM on All Records



Used to Perform CPM on Selected Records

Performing a CPM does not affected PM's

# General Notes

- Work records whose status is CANCELLED or CLOSED are not included in the Gantt view.
- If no Job Plan is associated with a PM the duration of the PM defaults to 1 hour.
- Use the PMForecastCronTask to set up a schedule to update your PM forecasts in order to maintain accurate dates without having to regenerate the forecast manually. The cron task allows PM forecasts to be updated at predefined intervals.
- You can set up multiple cron task instances, representing different types of assets, for different durations. For example, you want to update all PM forecasts on motors every six months, but you want to update the PM forecasts on pressure-control valves every five weeks. You can create a cron task instance for each scenario.

# Questions ?

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## Suggestions for Upcoming Webinar Topics

– [lhunter@cohesivesolutions.com](mailto:lhunter@cohesivesolutions.com)