Best Practices using the New Maximo Health, Safety and Environmental (HSE) Manager

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Agenda

1. What is Maximo HSE Manager?
2. History of HSE
3. Key Components and Terminology
4. Practical Applications
5. Live Demonstration
6. Best Practices / Tips
7. Questions
# What is HSE - IBM Maximo Product Portfolio – 2011

## Core Solutions
- Maximo Asset Management
- Maximo Asset Mgmt Essentials
- Maximo for Energy Optimization
- Maximo Data Center Infrastructure Mgmt

## Industry Solutions
- Utilities
- Life Sciences
- Nuclear Power
- Transportation
- Government
- Oil & Gas

## Add-On Solutions
- Service Provider
- Archiving
- Spatial
- Scheduler
- Internal Service Provider
- SMART Mobile Work Mgr
- Calibration
- Asset Configuration Manager
- Change & Corrective Action Mgr
- Linear Assets
- SMART Mobile Inventory Mgr
- MX Mobile Asset Mgr
- MX Mobile Inventory Mgr
- MX Mobile Work Mgr
- MX Mobile Work Mgr
- Everyplace
- SMART Mobile Auditor
- SAP ERP Adapter
- Oracle ERP Adapter
- Primavera Adapter
- MS Project Adapter
- Real Time Asset Locator

Health, Safety & Environmental

Specific content is subject to change.
What is Maximo HSE?

- A Maximo industry solution with a subset of new applications and application extensions.
- Extension (i.e. Assets)
- New applications (i.e. Regulatory Compliance)
History of HSE Manager

• Released 2011
• Originally Developed out of Oil and Gas Industry Requirements
• Maturity - Maximo Oil and Gas > 6 years (v6)
• Other Industries have similar requirements (removes specific O&G functionality drilling, O&G reliability)
• Health, Safety, Environmental, Quality and Compliance Requirements
• Joint releases with core Maximo 7.5+ onwards
Key Components and Terminology
Application Extensions

- Work Order Tracking
- Service Requests
- Quick Reporting
- Purchase Requisitions
- Purchase Orders
- Preventive Maintenance
- Job Plans
- Hazards
- Assets
- Asset List
- Locations
- Routes
- Item Master
- People
- Qualifications
Key Components and Terminology

New Applications

- MOC
- MOC Requests
- Action Tracking
- Defects
- Incidents
- Solutions
- Improvements
- Investigations
- Risk Assessment
- Prioritization Matrix
- Permit and Certificates
- Condition for work
- Standard Actions
- Standard Action Groups
- Operator Log
- Operator Tasks
- Operating Policies
- Operating Procedures
- Regulatory Compliance
- Risk Matrix
- Benefits and Losses
Practical Applications / Use Cases

- HEALTH, SAFETY AND ENVIRONMENTAL PROCESSES
  Reporting, use of Maximo incident, investigation, after action tracking.

- QUALITY AND RELIABILITY PROCESSES
  Defect, incident, investigation, RCFA, FMEA, after action tracking

- COMPLIANCE IDENTIFICATION AND REPORTING
  Detailing health, safety, environmental and quality regulations, operating policies, tracking changes, identification of affected asset or other procedures and their impact.

- MANAGEMENT OF CHANGE (MOC)
  Managing the business process of changes in process and asset configuration.
Let’s demonstrate...
Best Practices / Implementation Tips

- Spend time defining the whole business process, don’t expect product to fit your business process out of the box.
- Use Maximo workflow components to enforce and automate the business process.
- Ensure tracking, workflow and escalation of follow up actions – use the Maximo tools (Dashboards, escalations, workflow, KPIs).
- Talk to other users.
- Implement bite size chunks (by process).
Reliability Investigation

Corporate Reliability Manager
- Review Investigations initiated
- Assign or take ownership

Reliability Lead / Owner
- Select team members and assemble team
- In Progress

Investigation Team
- Investigate root cause of failure
- Document containment and permanent responses
- Follow up actions required?
- Finalize investigation and submit for review

Maximo
- 4.1 Incidents
- 4.5 Activities and Actions

Review and resolve
- Information complete and sufficient
- Yes → Close Incident
- No → Waiting for review

Closed
Questions

• ???
Thank You!

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