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DYNAMICS CON LIVE

MAY 2024



From Chaos to Control: Maintenance Planning and Scheduling in Microsoft Asset Management



Agenda

- Welcome and Introduction
- The fundamentals of maintenance planning and scheduling
- The difference between long-term planning and short-term scheduling
- Demo and Q&A



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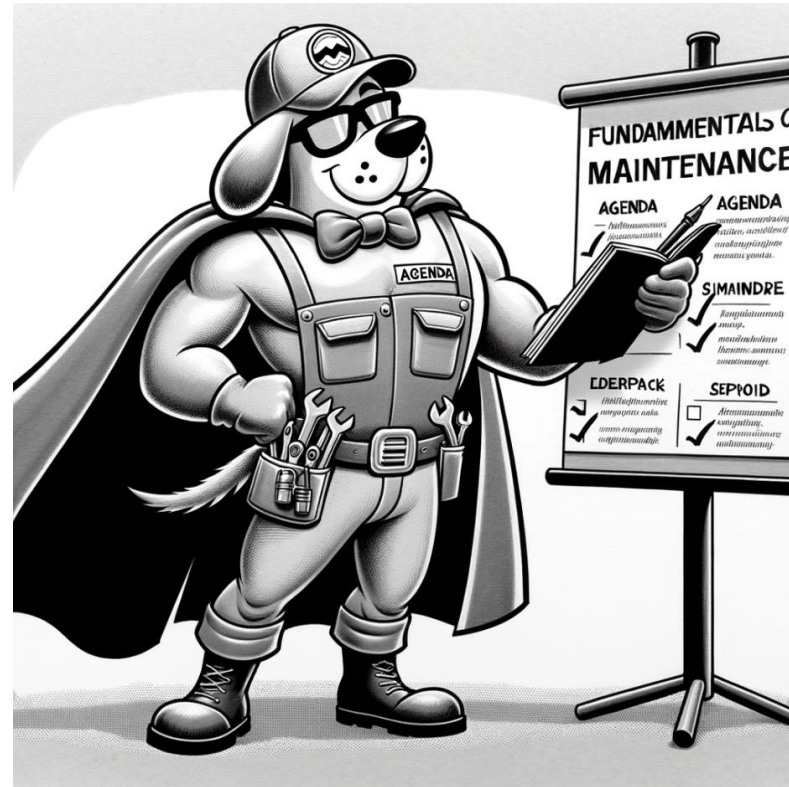








The time to repair the roof is
when the sun is shining.

John F. Kennedy

The fundamentals

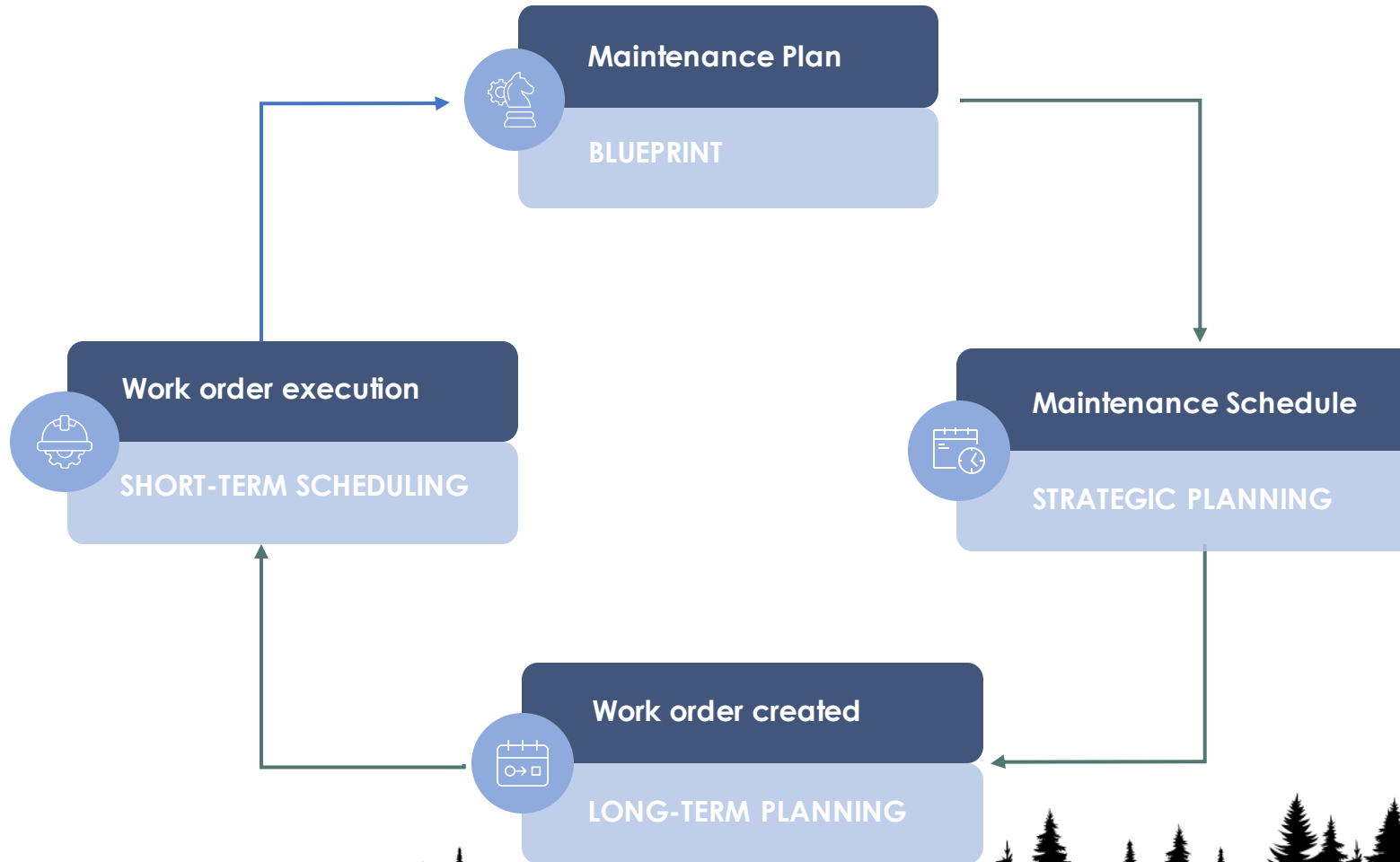


The fundamentals

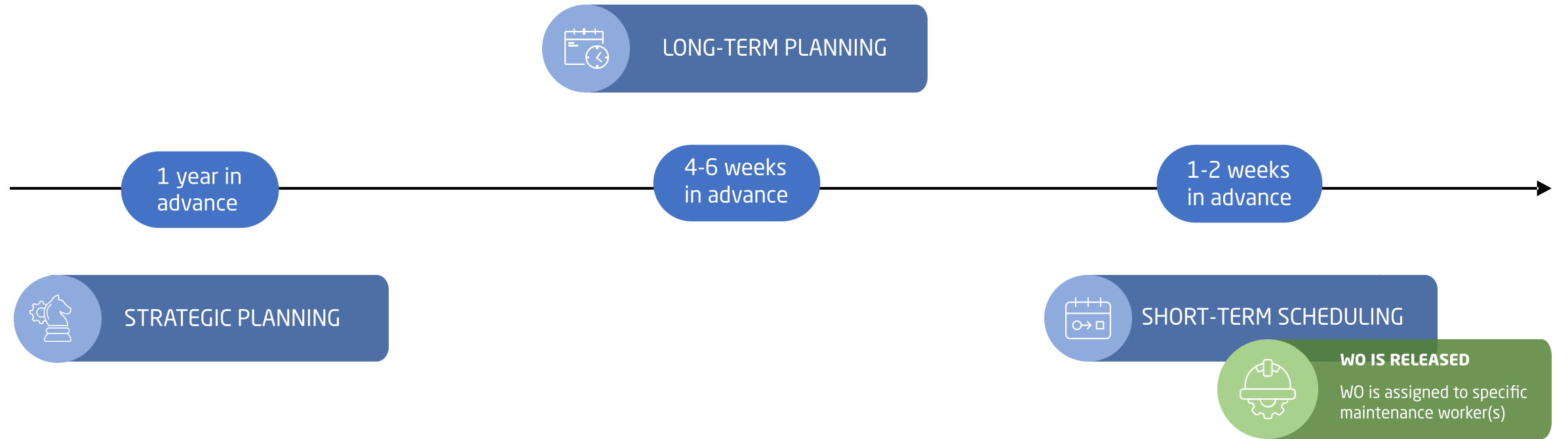
 ACQUIRE	 MANAGE	 MAINTAIN		 RETIRE
Acquire Fixed assets	Functional locations	Breakdown maintenance	Budget & cost control	Dispose off fixed assets
Capitalize Fixed Assets	Multi-Level Asset structure	Preventive maintenance	Planning and Scheduling	Electronic reporting
Transfer, revalue, split Fixed assets	Asset register	Analytics & KPI's	Mobile execution	
Depreciate Fixed assets	Spare parts control	Maintenance checklists	Asset history	
Derived Books	Maintenance schedules	Fault management	Maintenance rounds	



Maintenance preventive lifecycle



Preventive maintenance timeline



Strategic planning



Strategic planning

Maintenance plans

Maintenance plan Name
Forklift PM Time based Forklift PM

Details

PLANNING	SKIP TOLERANCE	DETAILS
Plan date 1/1/2023	Tolerance days before 2	Lines 3
Active <input checked="" type="checkbox"/> Yes	Tolerance days after 2	Assets _____
		Functional locations 1

Lines

+ Add time line + Add asset counter line Remove

Line	Work order description	Line type
1.0	Annual forklift inspection	Time
2.0	Monthly forklift inspection	Time
3.0	Weekly forklift inspection	Time

- Simulate work orders
 - Schedule maintenance plans
 - Maintenance schedule
 - Job type defaults
 - Capacity load

✎ Edit + New 🗑 Delete Forecast Maintenance checklist Tools Work description Used by Copy defaults Options 🔍

Maintenance job type defaults

🔍 Filter

Maintenance job type	Maintenance job type v...	Trade	Functional location	Asset type	Manufacturer	Model	Asset	Hours
Inspection	Preventive							1.00
Inspection	Preventive	Monthly	Mechanic	Air Compressor				2.00
Inspection	Preventive	Monthly	Mechanic	Forklift				4.00

Long-term planning



Long-term planning

- Assign work orders
 - Responsible group or person
 - Work order expected start and expected end
 - Work order pool
 - Capacity load

Work order pool

Standard view ▾

Filter

Pool	Name
<input checked="" type="radio"/>	000236 Engine Rebuild Pro
<input type="radio"/>	O4 Outage week 4
<input type="radio"/>	Rebuild of tr... Rebuild of truck
<input type="radio"/>	SD Shutdown

Active work orders | Standard view ▾

Work order: WO-000466 Preventive Released

Lines Header

Customer ▾

Schedule ▾

EXPECTED	WORKERS
Expected start 5/1/2024 12:00:00 AM	Responsible group Mechanics ▾
Expected end 5/5/2024 12:00:00 AM	Responsible ▾

All maintenance jobs scheduled to

SCHEDULED

Scheduled start

Short-term scheduling



Short-term scheduling

Finance and Operations | Asset management > Work orders > Active work orders

Work order | Invoicing | **General** | Safe work | Options

Schedule | Procurement | Related information | Report

Schedule work orders | Work order schedule | Work order purchase requisition | Cost control | Work order report
Dispatch | Schedule logs | Work order purchase | Hour control | Work order consumption
Delete schedule

Active work orders | Standard view

Work order: WO-000472

Lines | Header

Work order header

SERVICE LEVEL	EXPECTED	SCHEDULED
Service level <input type="text" value="4"/>	Expected start 4/15/2024 06:10:10 PM	Scheduled start 4/16/2024 07:00:00 AM
CUSTOMER	Expected end 4/19/2024 06:10:10 PM	Scheduled end 4/16/2024 12:00:00 PM
Customer account		

- Schedule work orders
 - Dispatch or Automatic schedule
 - Work order schedule lines
 - Work order schedule start and end
 - Scheduled capacity load

Demo



Q&A



