Case Studies
Case Study no. 2

Initial implementation: 15th August, 2014

Date of last case-study update: 10th September, 2014 (current total number of client work orders: 125)

Company Description:
NATA Bakery, located in Macau, China has two production units and three outlets.

Maintenance Department Description:
2 full-time & 1 part-time staff, responsible for all configuration, installation, preventive, predictive and corrective maintenance as well as ensure that safety & fire prevention equipment is available and operational at all times in all production areas and outlets. The maintenance department also manages jobs done by vendors/ suppliers. Most maintenance tasks need to have production/ operations involvement.

Current CMMS Requirements:

- Creation of work requests with no login (requires dedicated account)
- Work order work flow system
- Scheduled preventive maintenance
- Task lists attached to work orders created by maintenance plans for commonly performed tasks and checks
- Availability of historic asset data (implies asset hierarchy break down)
- (minor) spare part management
- (minor) tool management

Implementation Notes:

- The following plants (as in sites) were created: UNIT A, UNIT B, OUTLET A, OUTLET B and OUTLET C – If you do not see all the plants on the FL browser, you need to go to ORG_ADMIN usergroup configuration, FL section and set "Can Select Plant on FL Browser" to TRUE!
- Only one department was created (MTC – maintenance). We used the default automatically created by the system. The maintenance departments is automatically assigned to the first plant (UNIT A) and the outlets will be created under the same UNIT A as FL levels.
- On the WO/WR module, set the work request to always be sent to UNIT A/ MTC. Do not consider "locations". Do not consider "counter units".
- Focus on the more complex UNITA and fill in all FL levels. Actively start by generating maintenance plans as the levels are added – Do not wait for all FL levels to be completed before starting work order generation – Add maintenance plans as you go to immediately start using the CMMS. Always tag work order sources with the [MPlan] tag + [FREQUENCY] tag. A maintenance plan source WO would be, for example, "[MPLAN][3M] Title of the job".
- Add FL levels as Work requests need to be created.
- Add the two other maintenance department users (requires paid account).

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In this case, all users are given ORG_ADMIN permissions to start will. Ensure assignment of all users to UNITA/ MTC.

At this point, the following requirements are essentially implemented (X below means achieved with client well into adding additional items where that's relevant):

- 'X' Creation of work requests with no login (requires dedicated account – available to all paid accounts on the 18th Sep, 2014)
- 'X' Work order work flow system
- 'X' Scheduled preventive maintenance
- Task lists attached to work orders created by maintenance plans for commonly performed tasks and checks (this has not been required by customer so far but clear instructions have been given).
- 'X' Availability of historic asset data (implies asset hierarchy break down)
- (minor) spare part management (this has not been required by customer so far but clear instructions have been given).
- (minor) tool management (this has not been required by customer so far but clear instructions have been given).

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Author: commacmms
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