

# RDMI

## **COMPUTERIZED MAINTENANCE MANAGEMENT PROJECT**

### **Implementation Strategy Document**

PREPARED BY:

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# RDMI

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January 12, 2001

Richard Eaton

Dear Richard:

**Re: SWAT Team Implementation and Training Documentation**

Reference to our conversation, this document explains SWAT Implementation Program.

Attached please find Scope of Work on our implementation and training program for the Computerized Maintenance Management System on Turn-Key basis under SWAT team approach.

The cost for this Implementation and Training are summarized as follows:

SWAT Team On-Site Implementation and Data Entry  
\$9,500 Plus GST and Expenses

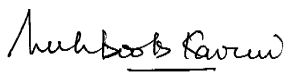
These services will provide setup, implementation, data entry and training, as well as site evaluation and implementation schedule. The site evaluation will analyze the processes that are in place and determine the best course of implementation. The implementation outline will give a suggested scenario for implementation. Training for your personnel will be conducted and designed around your schedules and needs.

We look forward to working with your team on this important project. Please go through the document and if you want to make any changes do let us know.

In the meantime, if you have any questions or need any clarifications, do not hesitate to call us at 416-491-8858.

Best Regards

Sincerely,



Mehboob Karim, P.Eng.  
Principal Engineer

## **Implementation Plan:**

This report contains a system implementation plan for MoCA for Windows, a computerized maintenance management software.

The CMMS provides the backbone for an automated maintenance information management system. The three basic elements of an automated maintenance information management system are 1) Software, 2) Information content, and 3) Implementation and Training services. This implementation plan presents a logical approach for balancing these elements towards the achievement of the client's maintenance management goals and objectives. RDMI will manage this project in accordance with project management techniques. The RDMI's project manager will act as the contact person for the client. The project manager, who will be co-ordinating directly with the Plant Engineer, will provide timely updates on project status, schedule changes, data conversion, training requirements, and a project summary analysis.

A five step approach to the implementation is as follows:

**Step One - Implementation Seminar**

**Step Two - Equipment and PM Database Development and Process Review**

**Step Three - Inventory Database Development and Process Review**

**Step Four - Purchase System Development and Process Review**

**Step Five - Software System Training**

The steps of the implementation plan outlined here are the fundamental steps that must be addressed to ensure a successful implementation. RDMI offers to complete each step jointly with the project team. Each step must be addressed by either RDMI or the client's internal staff to achieve the intended benefits of a maintenance information management system. *RDMI will make a good faith effort to complete each step for the client within the time period specified by the proposal.*

***Step One:***

### **Implementation Seminar**

RDMI's project manager will conduct, at the *client's facility*, an implementation planning seminar, and direct initial activities of the project. This seminar shall include users from Maintenance, MIS, Accounting, Production, Purchasing and other concerned departments. The goals of the project will be established and agreed upon during this

meeting. In establishing our strategy we will determine how best to allocate RDMI and client's resources in order to ensure a successful and timely project completion. The implementation seminar will provide the foundation and guidelines to ensure a timely and smooth implementation.

The seminar will serve to:

- Set objectives/goals and review time frame
- Establish criteria for measuring the success of the project
- Review project time line
- Define and establish coding standards
- Review existing purchasing practices
- Define/review maintenance procedures
- Verify hardware requirements/networking issues
- Establish working process for storeroom control and work order management.

*Step Two:*

### **Equipment and PM Database Development and Process Review**

RDMI will perform a review of existing CMMS database and develop a technical specification for review. Based on RDMI's recommendations and guidelines established, the database will be converted to meet SOP, HACCP, FDA or ISO9000 or QS9000 requirements. Database verification is essential to ensure continuity in management analysis and reporting. The decision about how to convert the data, whether manual or electronic, will be made during this step.

RDMI will work in conjunction with client's personnel to develop an equipment database and Preventive Maintenance database on predetermined critical and production equipment as outlined in the SOP. This joint session will provide a systematic design for the client to review and implement as a template to use on remaining non-critical equipment. The following data will make up CMMS's equipment and Preventive Maintenance databases, and is subject to availability:

*Equipment:*

- Equipment types categorisation, numbering and description
- Model number, serial number
- Equipment Location
- Cost centres
- Department
- Components
- Spare Parts Listing

*Preventive Maintenance:*

- Task number scheme
- Task scheduling information (start date, scheduling type, and scheduling frequency)
- Equipment listing
- Task Instruction\* (as specified by existing procedures and equipment manuals.)
- Required parts and tools

\* *Data entry person to be made available by the client.*

***Step Three:***

**Inventory Database Development and Process Review**

RDMI will work in conjunction with the client to develop an efficient and streamlined storeroom. From this joint session a systematic design will be outlined for the client to review and implement. RDMI will also work with the client to develop basic storeroom operational procedures.

- Define inventory check out and return procedures
- Stock locations strategies
- Bar code practices and implementation strategy
- Staffing requirements

Inventory integration will be provided in accordance with the SOP guidelines. RDMI will set up the main storeroom for use with CMMS, including Barcode capability and use. RDMI, with the help of storeroom clerk, will assist in collecting and entering inventory data.

The following data will be collected and an inventory database developed to meet SOP requirements.

- Inventory database development: Item number, description, type and, location.
- Re-order points and quantities will be established along with vendor information and pricing.
- A Physical Inventory of your storeroom will be performed; including minor reorganization of inventory if necessary and acceptable to your staff.

Written recommendations on streamlining storeroom operations may be provided on request.

***Step Four:***

**Purchase System Development and Process Review**

RDMI will work in conjunction with the client to develop an efficient Purchasing System. From this joint session a systematic design will be outlined for the client to review and implement. RDMI will also work with the client to develop basic procedures such as:

- Define auto or manual requisitioning procedures
- Suppliers/vendors database development
- Purchase order generation based on approval levels
- Purchasing for non-stock items
- Receiving functions and procedures

Integration will be provided in accordance with the SOP guidelines. RDMI, with the help of purchasing and receiving staff, will assist in collecting and entering data.

Written recommendations on purchase/receiving operations may be provided on request.

***Step Five:***

**Software System Training**

During this step a RDMI Engineer will provide hands on system training to the Project Manager. This training will cover the day to day use of the software. The training will adhere to SOP requirements with a maximum of two individuals may be trained. Facility database's will be incorporated for training as a review process to verify configuration and data integrity.