


factsheet

ISSUE 8



15 steps to successful CMMS implementation

CMMS IS ONLY AS GOOD AS THE IMPLEMENTATION - HERE IS YOUR STEP-BY-STEP GUIDE TO GETTING YOUR CMMS ASSET MANAGEMENT STRATEGY OFF TO A FLYING START.

- 1 Site surveys and asset registers**

Before you begin you will need to gather accurate asset information in order to complete the maintenance management system. This will allow you to record important information about existing plant and spare parts for entry into the CMMS database. Areas to be considered include: mechanical and electrical process equipment, civil and structural infrastructure, portable appliances and laboratory equipment. Asset registers should be made available for all maintainable equipment on your site.
- 2 P & I diagrams and reference drawings**

Updates to P & I diagrams and reference drawings may need to be undertaken, and adding asset numbers to drawings as a cross-reference to the CMMS asset register should be considered.
- 3 System identification and tagging**

Assets should have a physical tag attached to identify them when inspections or maintenance work is carried out. This tag number should cross-reference to your drawings and CMMS register.
- 4 Project management - structure development**

Detailed discussions should take place on site with your engineering and operational staff to help develop the asset and maintenance management system structure. This should happen on an ongoing basis as well as prior to implementation. Also, you should identify key assets for critical analysis and consequence of failure review. Your asset management guidance and policy should be developed at this stage.
- 5 Defect reporting system**

You should develop a defect-reporting system for all of your assets that is integral to the CMMS. This involves developing and measuring defects and faults for operational plant and site services equipment including the analysis of fault codes and downtimes for all areas of your site. Initially, it is recommended that a top-level asset register is developed in order that defect reporting can start immediately.
- 6 Criticality analysis**

You should identify critical equipment requiring routine or increased planned maintenance and inspection. You should then carry out the development of maintenance strategies based on the results of the critical analysis. This analysis should consider the effect of your equipment and systems on safety, environment, production, quality and legislation.

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- 7** **Develop coding structure and maintenance philosophy**
A matrix of equipment and asset categories should be compiled for all maintainable equipment across your facilities. This matrix will form the basis for implementation of maintenance schedules in the planned maintenance system, and should remain as a controlled working document. The maintenance philosophy should be developed for all equipment on site and maintenance schedules developed accordingly. It should include such information as work type, who carries out the work and frequency between tasks.

The matrix should include those tasks carried out by fitters, electricians, specialists, insurance and non-specialists as well as detailing site critical assets, calibration schedules and electrical test schedules. There may be a run to fail policy for some equipment and condition monitoring policy for others. This policy should be decided at this stage and implemented into the planned maintenance software. The matrix should detail the minimum standard expected for maintenance, inspection and testing of equipment on your site.
- 8** **Coding structure**
This involves the development of the asset and task coding structure carried out to complement the Maintenance Matrix. Codes should be standardised across your facility to include coding for assets, maintenance schedules, trades and personnel, maintenance service and category, site systems and registers.
- 9** **Maintenance planning**
Maintenance schedules should be compiled for each equipment type and job frequency in accordance with the categories developed during the maintenance philosophy and coding phase of the project. These maintenance schedules should be available for approval prior to transfer to CMMS, and should remain as master documents for amending as required. If a maintenance schedule needs to be updated as a result of site comment or legislation this should be carried out in consultation with the site engineer. The master document should then be updated and approved before transfer to CMMS.
- 10** **Coding**
Your CMMS coding should then be developed and standardised across your entire facility. This can be used as a master for other facilities if required. Coding details will vary according to your needs, but are likely to include some of the following areas: asset descriptions, cost centres, departments, fault areas, hazard identification, location, permit to work and many more.
- 11** **Asset data input**
This involves the collation of data and data input from information received as well as the structure development. This data should now be transferred to CMMS.
- 12** **Maintenance schedule - compilation and input**
This is the data collation from maintenance schedules developed during this project. This data should now be transferred to CMMS.
- 13** **Planned maintenance planning**
Now is the time to compile the planned maintenance plan from the assets and maintenance schedule information. This should include practical and efficient maintenance plans in accordance with your maintenance philosophy and the grouping of assets in line with the following 5 rules: 1. Location, 2. Common location, 3. Equipment type, 4. Major equipment, 5. Product, system or partial location.
- 14** **System training**
It is important to carry out awareness training with the maintenance management team.
- 15** **Additional considerations**
Other consideration should include further awareness training and seminars intended to raise the profile of the asset maintenance strategy, and invite feedback from operational staff. Also, think about a CBM benchmark study and the coordination of your purchasing system with CMMS and CMMS stock control / spares strategy.

As you can see there is much more to CMMS than simply buying the right software. Without good implementation your planned maintenance program may never get off the ground. For more information on CMMS implementation please contact EPM Solutions on 0141 848 6609



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