Building a Bridge Between Maximo and DEAM

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PRESENTATION GOALS

Stanley Perli – Director of Business Applications at Storeroom Solutions Inc. Oversees the Integration of various Enterprise Applications with Customers and Vendors. Additionally, responsible for IT Project Management and administers a part of the Application Development team.


Show that Perficient teamed closely with SSI and built a strong technical solution in a rapid time, meeting or exceeding goals.

Overall joint solution allows SSI to deliver superior service to their customer, meeting or exceeding goals.
PERFICIENT PROFILE

Founded in 1997
Public, NASDAQ: PRFT
2015 revenue $473.6 million

Major market locations:
- Allentown, Atlanta, Ann Arbor, Boston, Charlotte,
- Chattanooga, Chicago, Cincinnati, Columbus, Dallas,
- Denver, Detroit, Fairfax, Houston, Indianapolis,
- Lafayette, Milwaukee, Minneapolis, New York City,
- Northern California, Oxford (UK), Southern California,
- St. Louis, Toronto

Global delivery centers in China and India
>2,800 colleagues
Dedicated solution practices
~90% repeat business rate
Alliance partnerships with major technology vendors
Multiple vendor/industry technology and growth awards
WHAT MAKES US DIFFERENT

Industry-leading digital experience and business optimization expertise
2600+ experienced colleagues
Dedicated solution and industry practices
Partnerships and certifications in premier technologies

Disciplined project execution
Highly experienced project managers
Enable™ Methodology based on best practices

Products that expedite delivery & reduce cost
Accelerators for key horizontal disciplines
Tools for industry-specific business challenges
Utilities with embedded technology expertise
Methodologies incorporating proven processes
Support programs, design standards & product release schedules

Collaborative approach
Work with our clients, adapting to their cultures
Education and mentoring services

Superior service and value
Local client service teams
Flexible resource and fee arrangements
Multi-shore delivery capability
Delivery track record

Commitment and quality assurance
Track record of more than 2000 engagements with 800+ clients
~90% of clients bring us back
Strong client references
STOREROOM SOLUTIONS PROFILE

216+ active sites

Over $500 Million managed spend

1987 established

Safety 1st priority

700+ team members

3 million purchasing portfolio sku’s

$400 Million managed inventory

Integrated Plant Services:
- Supply Chain Services
- Master Data Leadership™
- Asset Management Services
- Technology / CMMS

$$$ performance-based contracts

$500 Million purchasing portfolio sku’s

Performance-based contracts

$400 Million managed inventory

Integrated Plant Services: Supply Chain Services, Master Data Leadership™, Asset Management Services, Technology / CMMS

Performance-based contracts

$500 Million purchasing portfolio sku’s

Performance-based contracts

$500 Million purchasing portfolio sku’s
SSI Global

United States
Canada
Mexico
Puerto Rico
Singapore
• Data Enrichment Services
• MRO Logistix - SSI exclusive distribution channel
• Engineering Services
• Proprietary cloud based system designed to serve MRO & Reliability
• Integrates content, supply chain, asset management & business intelligence in one platform
• Seamless integration to validated CMMS, ERP, SRM
SSI SYSTEMS INTEGRATION PORTFOLIO

- SAP
- Ariba
- IBM Maximo
- Infor
- Blue Mountain
- Archibus
- Dynamics EAM
- Auto Crib
- CribMaster
- Oracle E-Business Suite
- Oracle JD Edwards
- Emaint
- TMA Systems
- IMMpower
VISION

• Partnership – SSI and Perficient

• Responsiveness to Client need

• Long Term Value

• Everyone attains their Goals
PROJECT NEEDS

- Storeroom Solutions (SSI) has been engaged by a Renewable Energy provider to execute their inventory management and standard purchasing functions.
- SSI uses Dynamics EAM (DEAM) for working with Vendors on quotes, sending Purchase Orders, and handling Invoices as part of their offering for outsourcing these functions.
- The Renewable Energy provider uses Maximo Enterprise Asset Management for managing their Assets, Work Orders, Purchase Requisitions, Inventory, etc.
- Identified Need - A bridge between these two systems (and business processes).
- SSI engaged Perficient to help develop that bridge (Ambassador Bridge)
• The Energy Provider was urgent to resolve the identified issue as soon as possible
• Without a bridge between the two systems accurate management of the Purchasing Process was going to be very difficult
• Perficient was engaged to rapidly build that bridge alongside SSIs Interface Team
The SSI and Perficient Teams worked closely together in understanding the different data structures and capabilities of the DEAM and Maximo systems.

- Several structural differences were noted between the two systems, including: Revisions in Maximo, Maximo allowing multiple due dates on a PR by PR Line, abilities to change records in different approval states, and more.

A series of interfaces and system restrictions was planned to prevent unwanted changes and to account for these differences.
PLANNED INTERFACES

MAXIMO

1. Reorder, Planning and Scheduling or other need drives creation of a Purchase Requisition

2. The Purchase Requisition needs to be sent to DEAM so that SSI can obtain quotes

3. The Purchase Requisition is updated with the Quote Data

DEAM

4. Approval Workflow automatically generates a PO when approved

5. The final PO Quantities and Line Items are sent back to DEAM and the Purchase Order is sent to the Vendor

6. When a shipment comes in, it is received in Maximo and that information is sent to DEAM for tracking and closing the record
BUILDING THE BRIDGE

- The joint SSI/Perficient team undertook building the data bridge, starting from both ends
  - New Objects Structures were needed in Maximo to present the data needed to process it in DEAM
  - XSLT Transformations were needed to format the XML output from Maximo into the required WSDL format
  - New structures were needed in DEAM to handle some of the variations that Maximo allows, in order to have the minimal impact on the Energy company’s business processes
  - DEAM Interfaces were needed to pass the Quote data to Maximo
RESULTS

• The SSI and Perficient team met the goal for the timing of the bridge, enabling the clear two-way communication between DEAM and Maximo at the start of the new service from SSI to the Energy Provider.

• The bridge is being used today to execute the purchasing functions for the Energy company, and results have been in line with goals and requirements.
THE MAXIMO – DEAM ADAPTOR: SENDING DATA FROM MAXIMO TO DEAM
THE MAXIMO – DEAM ADAPTOR: SENDING DATA FROM DEAM TO MAXIMO

Dynamics EAM

| XSLT | Quote Data |

Secure protocol

Maximo Integration Framework

Purchase Requisition WSDL

Maximo
PROCESS CHANGE SUPPORTED BY THE SYSTEMS

Old Process

Material or Service Need

Manually Create Purchase Requisition, Including Pricing

Approval Workflow

System Generates Purchase Order

New, Improved Process

Material or Service Need

Manually Create Purchase Requisition

System automatically sends PR to DEAM

Approval Workflow

SSI Obtains Quotes in DEAM

System automatically sends Quote to Maximo

System Generates Purchase Order
BEST OF BOTH WORLDS

• Asset Management
• Work Management
• Service Management
• Contract Management

• E-Catalog
• Procurement
• Inventory Management
• Master Data Leadership

IBM MAXIMO

Dynamics EAM

PERFICIENT vision. execution. value.
Building a Bridge Between Maximo and DEAM

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QUESTIONS?