

## REQUIRED DOCUMENTS FOR THE ASSET MANAGEMENT SOLUTION SOFTWARE

### AI-Powered Asset Management and Maintenance Solution for OCP

Executive Version | February 2026

#### 🎯 MVP OBJECTIVE

Demonstrate value in 3 key functionalities:

1. **Intelligent capture** from field (voice + text + image → structured work request)
2. **Planner assistant** (reduces analysis and decision time)
3. **Backlog optimization** (intelligent prioritization and grouping)

**Pilot scope:** 1-2 critical equipment in 1 plant

#### 📋 ESSENTIAL DOCUMENTS

### 1. WORK MANAGEMENT WORKFLOW DOCUMENTATION

- **AS-IS Workflow Map:** Current work request process
  - How inspectors/operators submit requests today (email, verbal, SAP, etc.)
  - Current approval chain and decision points
  - Information flow between production, maintenance, and planning
  - Average times per stage
  - Identified friction points
- **Work Request Standard (if any exist):**
  - Templates currently in use
  - Required information fields
  - Approval authorities by work type
  - Priority classification criteria
- **Planning Process Documentation:**
  - How planner receives and processes requests
  - Information gathering steps (materials, resources, timing)
  - Communication protocols with warehouse, supervisors, production
  - Scheduling rules and constraints
- **Work Management Framework and SAP Configuration Blueprint**
  - Business Process Maps for Work Management:
    - **Identification & Prioritization:** Defining work scope and urgency.
    - **Planning:** Detailing resources, materials, and steps.

- **Scheduling:** Setting date for the execution (including preventive work - based on the Maintenance Strategy in SAP, and correcting work from existing backlog).
- **Execution:** Performing the work, often supported by project management tools.
- **Monitoring, Controlling & Closing:** Tracking progress, recording activities, and updating backlogs.
- SAP PM rules and Master Data configuration

**Format:** PowerPoint/Visio or Word description **Priority:**  DESIRABLE

## 2. EQUIPMENT HIERARCHY & MASTER DATA

**From SAP PM:**

- Complete SAP hierarchical structure (Plant → Area → System → Equipment → Component) and Asset Register (Equipment Make and model, components TAG, etc.)
- TAGs of selected pilot equipment
- Criticality classification (AA, A+, C, D)
- Physical location

**Format:** CSV/Excel export from SAP **Priority:**  CRITICAL

## 3. WORK ORDERS HISTORY

**Minimum last 12 months:**

- Work order number
- Equipment TAG
- Type: PM01 (Inspection), PM02 (Preventive), PM03 (Corrective)
- Execution date
- Duration in man-hours
- Equipment/Component worked on
- Problem description
- Materials consumed
- Final status (completed/pending/rescheduled)
- Reason for postponement (if applicable)

**Format:** SAP export transaction IW38/IW39 **Priority:**  CRITICAL

## 4. SPARE PARTS CATALOG (BOM)

**Per pilot equipment:**

- SAP spare part code
- Spare Part description

- Common description
- Applicable equipment
- Supplier lead time
- Criticality

**Format:** Excel/CSV from SAP **Priority:**  CRITICAL

## 5. CURRENT SPARE PARTS INVENTORY

- SAP code
- Available quantity
- Warehouse location
- Minimum/safety stock

**Format:** Excel/CSV from SAP **Priority:**  CRITICAL

## 6. CURRENT MAINTENANCE BACKLOG

- Pending work requests (last 3 months)
- Assigned priority
- Creation date
- Current status
- Estimated resources
- Reason for being pending

**Format:** Excel/CSV **Priority:**  CRITICAL

## 7. TECHNICAL MANUALS

**Per pilot equipment:**

- Manufacturer's O&M manual (PDF)
- P&IDs (PDF/images)
- Technical specifications (datasheets)

**Format:** PDF **Priority:**  IMPORTANT

## 8. PREVENTIVE MAINTENANCE PLANS

**Per pilot equipment:**

- Frequency of each PM
- Task list
- Associated spare parts
- Estimated duration

- Required specialties
- Last execution
- Next scheduled date

**Format:** Excel/CSV from SAP IP10 **Priority:**  **IMPORTANT**

## 9. AVAILABLE WORKFORCE

- Number of technicians per specialty:
  - Mechanics
  - Electricians
  - Instrumentation
  - Other specialists
- Work shifts
- Current availability

**Format:** Simple Excel **Priority:**  **IMPORTANT**

## 10. SHUTDOWN CALENDAR

- Scheduled shutdown dates (next 6 months)
- Type (minor 8hrs / major >20hrs)
- Duration
- Affected equipment

**Format:** Excel/calendar **Priority:**  **IMPORTANT**

## 11. PRODUCTION PLAN AND SCHEDULE

- Yearly Plan
- Basic monthly schedule
- Allowed maintenance windows
- Known restrictions

**Format:** Excel/calendar **Priority:**  **IMPORTANT**

## 12. BASIC FMEA (If exists)

**Per pilot equipment:**

- Critical components
- Identified failure modes
- Failure effects
- Recommended preventive tasks

**Format:** Excel **Priority:**  **DESIRABLE**

## 13. REFERENCE PHOTOGRAPHS

- 5-10 photos per equipment of:
  - Complete equipment
  - Main components
  - Typical spare parts
  - Inspection points

**Format:** JPG/PNG **Priority:**  DESIRABLE

## 14. CONDITION MONITORING DATA (If exists)

- Latest vibration readings
- Recent thermography reports
- Active alarms

**Format:** PDF/Excel **Priority:**  DESIRABLE

## ADDITIONAL CONTEXTUAL INFORMATION

## 15. REFERENCE COSTS

- Man-hour cost per specialty
- Average cost of common materials
- List of spares consumption by equipment
- Production loss cost (estimated)

**Format:** Simple Excel **Priority:**  DESIRABLE

## PRIORITIZATION FOR QUICK START

### WEEK 1-2: CRITICAL Documents ()

**Absolute minimum to start development:**

1. Work Management Documentation
2. Equipment hierarchy (1-2 critical equipment)
3. Work orders history (12 months)
4. Spare parts BOM
5. Current inventory
6. Current backlog

**With this we can:** Start prototype of the 3 core functionalities

## WEEK 3-4: IMPORTANT Documents (🟡)

**To complete functionalities:** 6. Technical manuals 7. PM plans 8. Workforce 9. Shutdown calendar 10. Production schedule

**With this we can:** Refine algorithms and validate business logic

## WEEK 5-6: DESIRABLE Documents (🟢)

**To enrich the solution:** 11. FMEA 12. Photographs 13. Condition monitoring 14. Costs 15. Current processes

**With this we can:** Optimize user experience and accuracy



## PREFERRED DELIVERY FORMAT

**For each document:**

- **Name:** Descriptive with date (e.g., `WO_History_Mill_SAG_01_2023-2024.xlsx`)
- **Location:** Shared folder in Drive/SharePoint organized by category
- **Contact:** Person responsible for that type of information
- **Notes:** Any peculiarities or special considerations

**Proposed folder structure:**

None

```
/OCP_MVP_Data/  
  /1_Equipment_MasterData/  
  /2_Work_Orders_History/  
  /3_Spare_Parts/  
  /4_Backlog/  
  /5_Manuals/  
  /6_Maintenance_Plans/  
  /7_Resources/  
  /8_Schedules/  
  /9_FMEA_RCM/
```

/10\_Photos/  
/11\_Condition\_Monitoring/  
/12\_Costs/  
/13\_Processes & Workflows/

## ⚠️ IMPORTANT CONSIDERATIONS

### Data Quality

- **We don't need perfection** in initial data
- Better to have "good" data quickly than "perfect" data late
- We can iterate and improve quality progressively
- **Dummy data** can be generated if some elements don't exist

### Confidentiality

- All information will be treated under confidentiality agreement
- TAGs and names can be anonymized if necessary
- Only project team will have access

### Point of Contact

- Designate 1-2 people from OCP to coordinate collection
- Weekly follow-up meeting during collection
- Agile communication channel (WhatsApp)

## 📈 EXPECTED VALUE WITH THIS DATA

### With CRITICAL documents (🔴):

Demonstrate intelligent capture from field  Show automatic priority analysis   
Visualize stratified backlog **Demonstrable ROI in planner time**

### With IMPORTANT documents (🟡):

Generate automatic weekly schedule  Group work intelligently  Consider real constraints  
**Demonstrable ROI in resource optimization**

### With DESIRABLE documents (🟢):

✓ Predictive failure analysis ✓ PM strategy optimization ✓ Advanced insights  
**Demonstrable ROI in corrective reduction**

 **NEXT STEPS**

1. **OCP:** Review list and confirm availability of each document
2. **OCP:** Designate responsible person(s) for collection
3. **OCP:** Select 1-2 specific pilot equipment
4. **VSC:** Prepare development environment and templates
5. **BOTH:** Kickoff meeting to start collection

**Goal:** Have CRITICAL documents (🔴) within 2 weeks maximum

 **CONTACT**

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