

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

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