OSIsoft® UC 2010

Real Time Information — Currency of the New Decade

Hilton San Francisco Union Square | San Francisco, CA

April 26-28, 2010

Enterprise Agreements

-

The Value of Managed Services & Software

Alton Loe, Director EPM
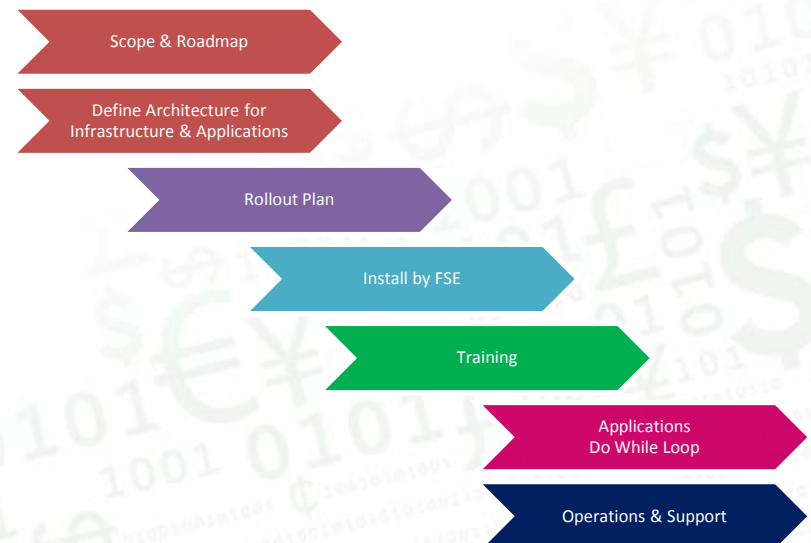
Alton@osisoft.com

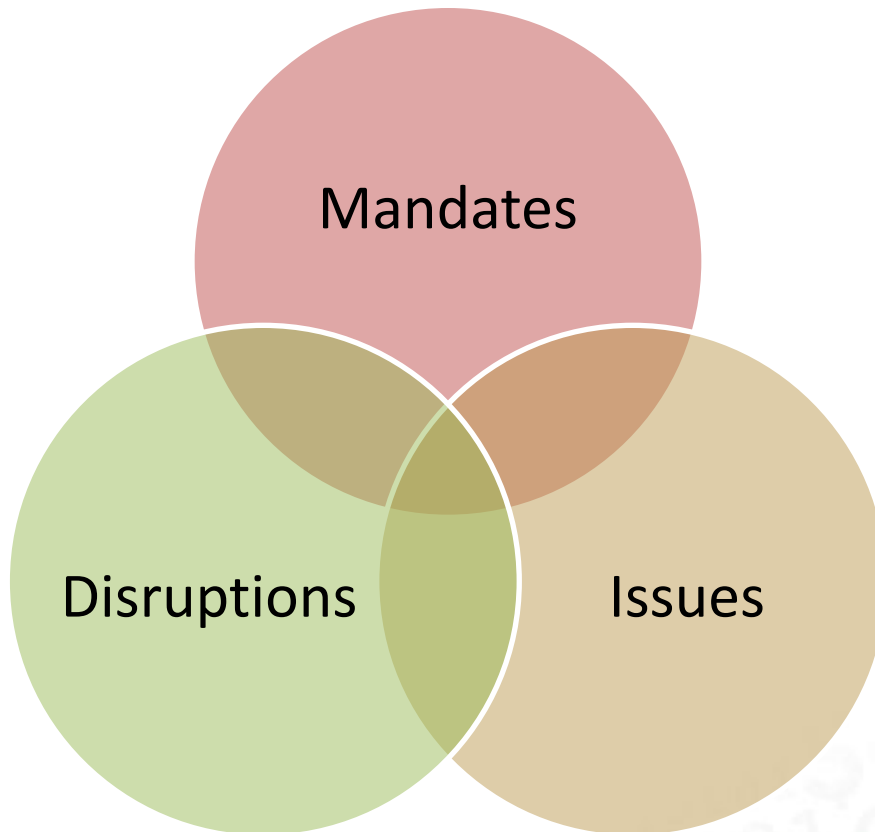John Matranga, Director CoE

John@osisoft.com

OSIsoft, LLC.

AGENDA

- Why EA?
- Your OSIsoft Options
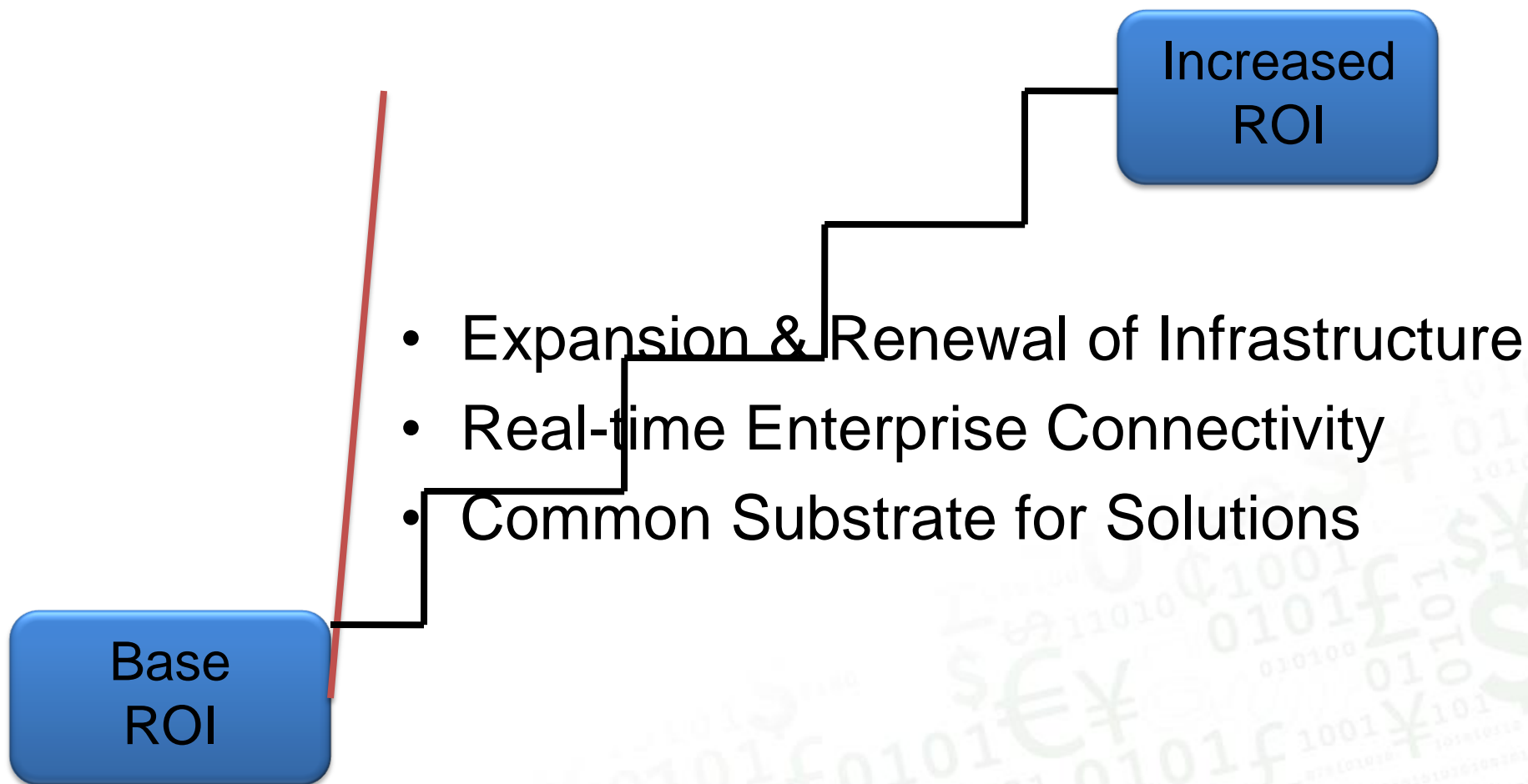- Project Rollout Support
- Recap and Q/A
- Entertainment

Scope & Roadmap

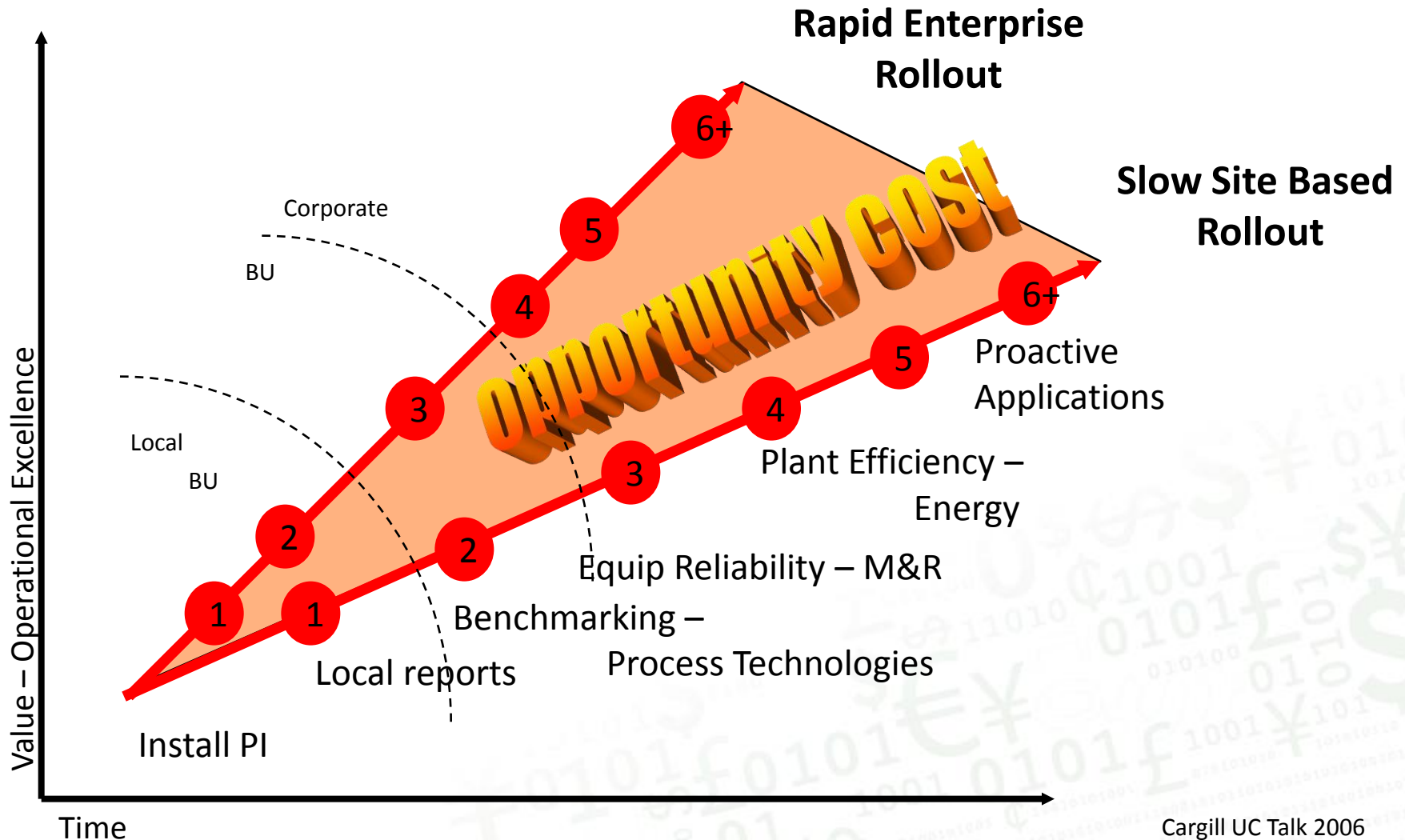Define Architecture for Infrastructure & Applications

Rollout Plan

Install by FSE

Training

Applications
Do While Loop

Operations & Support

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"Killer App"

Mandates

Disruptions

Issues

"Capabilities of PI"

- Trend
- Analyze
- Event
- Notify
- Contextualize
- Correlate
- Historize
- Span
- Integrate
- Reporting
- ....

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Step Change in Value

Increased ROI

- Expansion & Renewal of Infrastructure
- Real-time Enterprise Connectivity
- Common Substrate for Solutions

Base ROI

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Enterprise vs. Site Based Roll Out

Rapid Enterprise Rollout

Slow Site Based Rollout

6+

5

4

3

Corporate

BU

2

Local

BU

1

OPPORTUNITY COST

6+

5

Proactive Applications

4

Plant Efficiency – Energy

3

2

1

Equip Reliability – M&R

Benchmarking – Process Technologies

Local reports

Value – Operational Excellence

Install PI

Time

Cargill UC Talk 2006

Your Options from OSIsoft....

Walter Fredrick Morrison

Vs.

OSIsoft and the EA Services Team

OSIsoft. **UC2**

Step Change Process

Scope & Roadmap

Define Architecture for
Infrastructure & Applications

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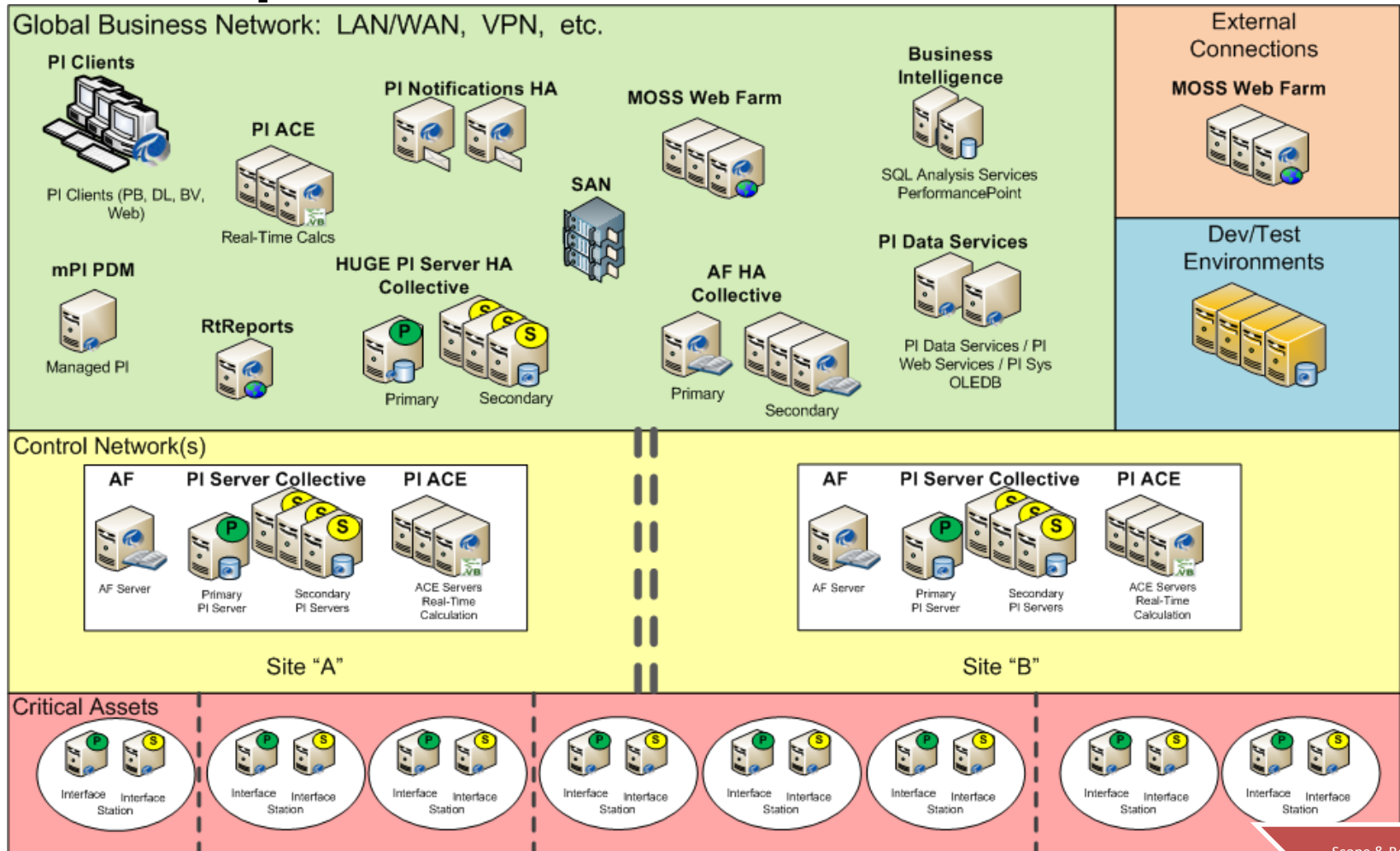**OSI**soft. **UC**
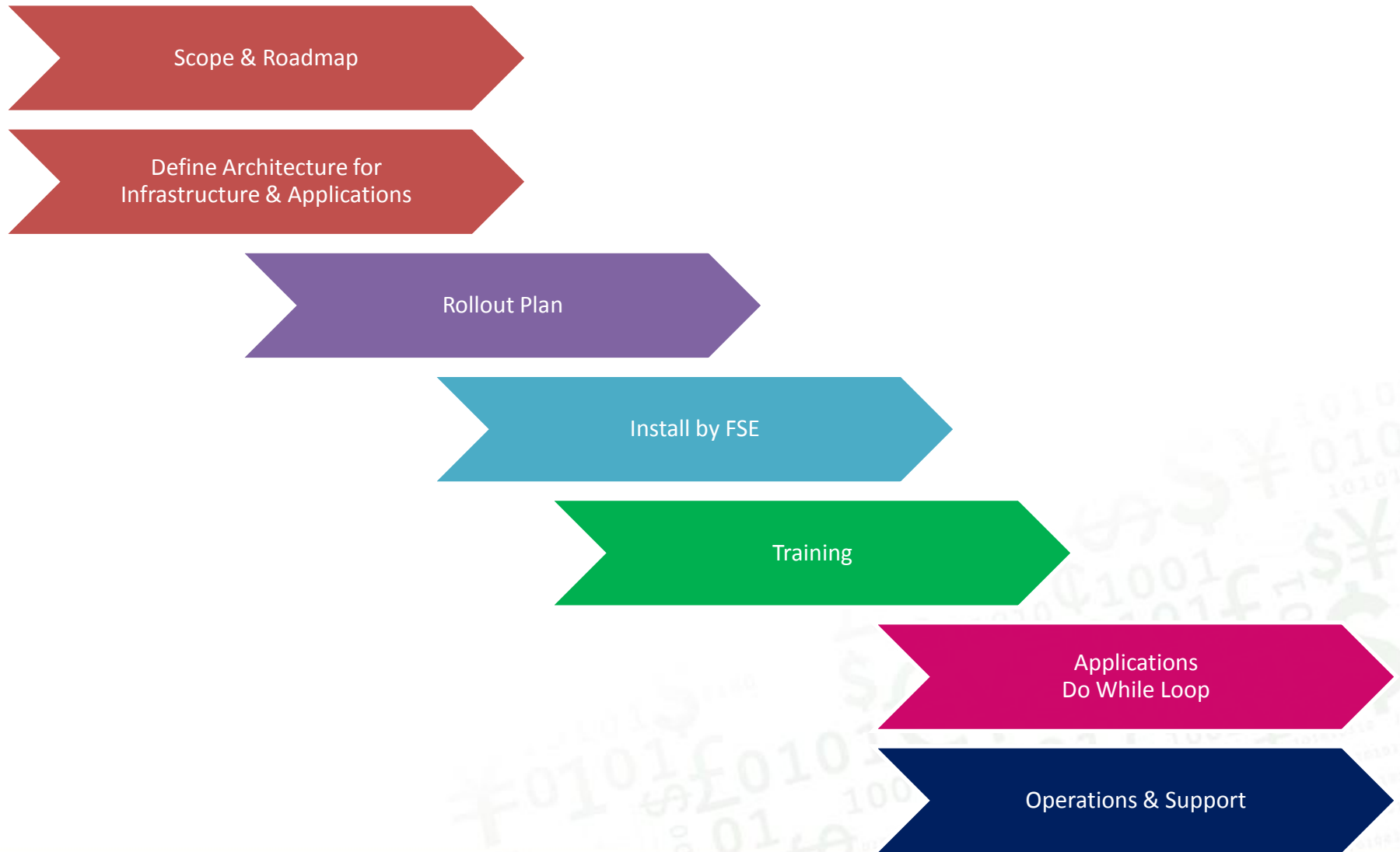
VRP: Value Realization with PI
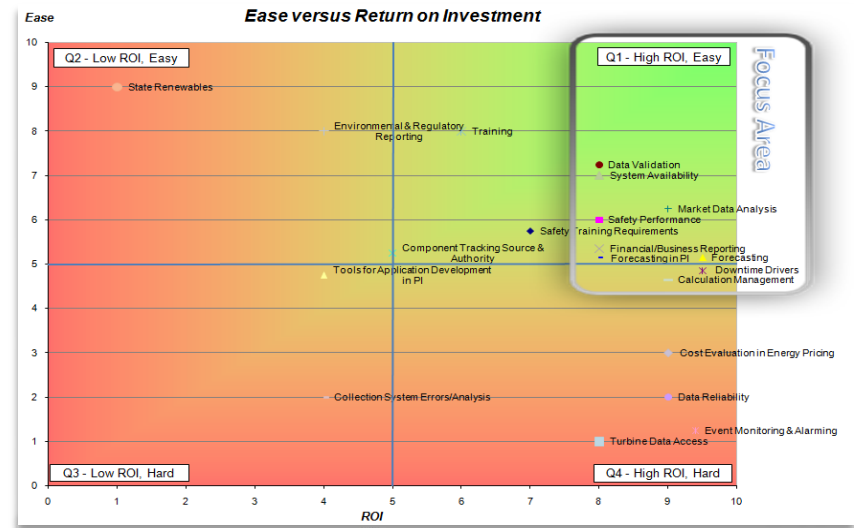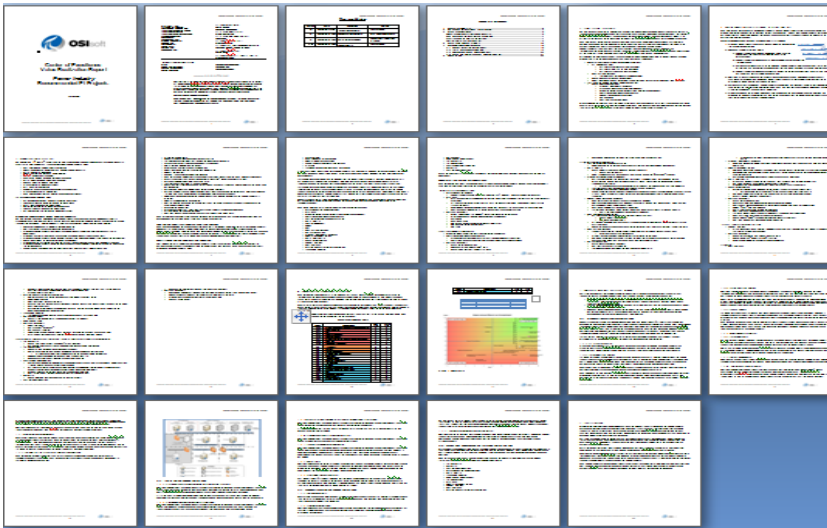
- **Coming to Consensus**
  - EA Corporate Vision & Goals
  - Industry Best Practices & Trends
  - OSIsoft Product Roadmap
- **Results**
  - Value Realization Plan
  - Value Quadrant

- **Methodology**
  - PI Team & Business Users
  - Pre-Meeting Education & Research
  - Facilitated Workshop (1.5 - 2 Days)
  - Value Opportunity Identification
  - Initial Findings Documentation
  - Finalize Findings
  - Set Prioritization

Scope & Roadmap

Define Architecture for Infrastructure & Applications

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Enterprises Architecture Needs

Enterprise Roadmap

- **Optimize Architecture Plans**
  - Value Realization Plan & Goals
  - Corporate Technology Roadmap
  - OSIsoft Product Details and Releases
  - Timelines – Fiscal, Calendar & Project
- **Methodology**
  - Needs Analysis
  - Straw-man Creation
  - Design Reviews
- **Results**
  - Enterprise PI Infrastructure
  - Implementation Roadmap

Scope & Roadmap

Define Architecture for
Infrastructure & Applications

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Rollout Plan and Review

Joint Development of the Roll Out Plan specifying:

- What services will be provided for the installation
- Overall Architecture
- Hardware Recommendation
- Software Requirements
- Interfaces required
- Defining the Data Collection Architecture

Rollout Plan

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Enterprise Wide PI Installations

- Installations by PI Experts
  - Jointly scheduled with customer
  - Site readiness checks 2 weeks prior to installation
  - Network of engineers on tap for problem resolution
- Most sites completed under a week
  - PI Server and Interfaces installed
  - PI Clients installed
  - Data Collection working
  - Data visible to end users
- Entire enterprise of 50 to 100 sites completed in a year
- "Down to a Science"
  - 85 % Remote

Install by FSE

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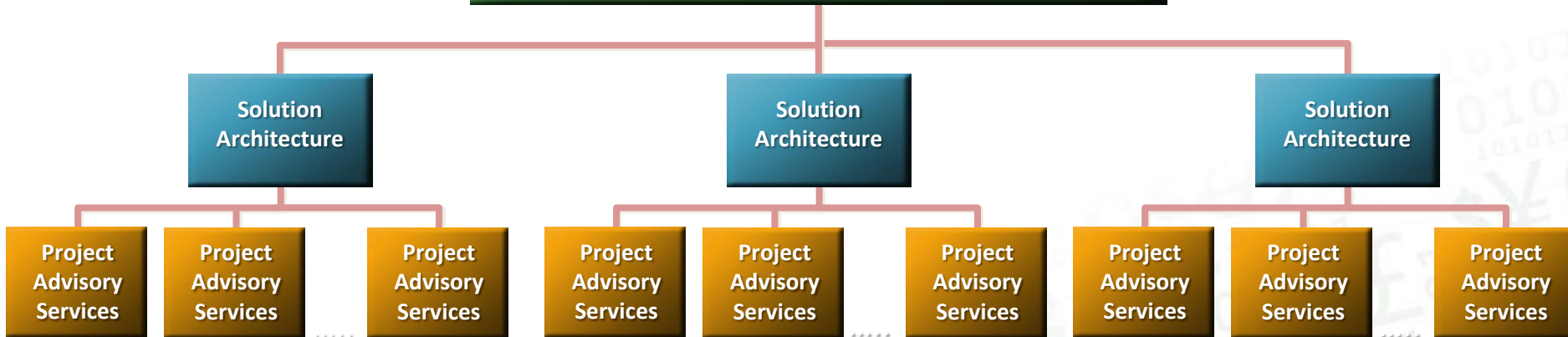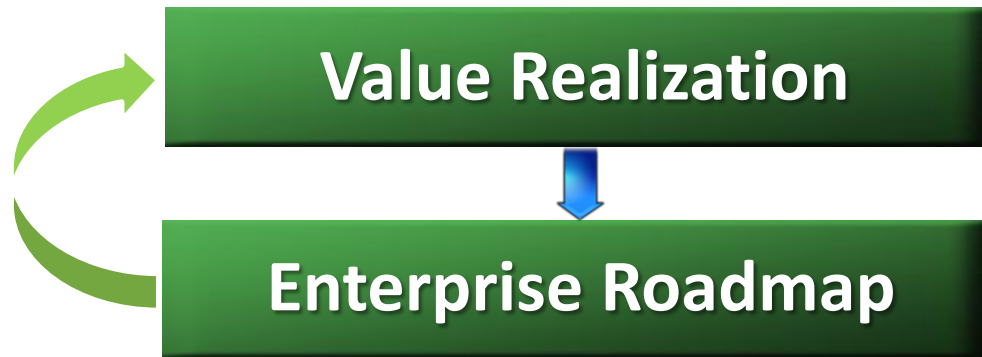# Training Recommendations

Name	ProcessBook					DataLink				RtWebParts			
	Role			History		Role		History		Role		History	
	User	Power User (Engineer)	Support	Experience	PI Client Tools	Power User (E...)						PI Client Tools	RtWebParts
Site Staff													
Site 1													
Adam Barrow									X		X	X	X
Cliff Downey							X	X	X		X	X	X
Eric Floyd							X	X	X		X	X	X
Gary Hutton				X		X	X	X		X	X	X	
Ivan Jones						X	X	X		X	X	X	
Ken Loften		X		X	X	X	X	X		X	X	X	
Mike Nulton		X		X	X	X	X	X		X	X	X	
Site 2													
Orvil Poulter	X				!	X			!	X		!	
Quinn Roberts	X				!	X			!	X		!	
Sam Towers	X				!	X			!	X		!	
Ugeth Victor	X				!	X			!	X		!	
Wayne Xerox	X				!	X			!	X		!	
Yolonda Zenney	X				!	X			!	X		!	
Adrian Buffer		X			!		X		!	X		!	
Site 3													
Carol Dorchester		X		X	!	X		X	!		X		!
Earl Flowers		X		X	!	X		X	!		X		!

Value Now

Training

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Value Over Time

Value Realization

Enterprise Roadmap

Solution Architecture

Solution Architecture

Solution Architecture

Project Advisory Services

Project Advisory Services

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Applications
Do While Loop

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Customer/SI Builds Detail Solution

- Proof of Technology - ?
- Design by OSIsoft
- Training if Needed
- Customer Build Cycle
- CoE Support for
  - Details Q/A with Context
  - As Build Process
- Support SI as Customer

Applications
Do While Loop

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Value Check Up
Example Agenda

- **Review Action item list from last review**

- **Review Tech Support Call Statistics / NOC Incidents / Status / Enhancement requests / Root Cause Review**

- **Infrastructure Review Rollout Process**

- **CoE**
  - Status and Documentation CoE Projects
  - Review concept ERP Integration
  - Review CoE concept PItoPI architecture
  - Auto Configuration Suite Integration Status
  - Feedback Project Test Results
  - Path forward PI SQC at Pilot Site

Applications
Do While Loop

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OSIsoft Managed PI (mPI)

- Monitors and collects health and performance data on PI system interfaces and subsystems

- Analyzed and compared against best practice guidelines to determine if system is running at optimal performance

- Customer's systems are maintained remotely to ensure mission critical high availability, optimum performance with a high level of security

- Problems are identified much faster, and in some cases, well before they are even recognized by the users

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We will identify the issue:

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Access your system remotely…

Support Coverage

Follow the Sun Support
Model: 24/7 Support
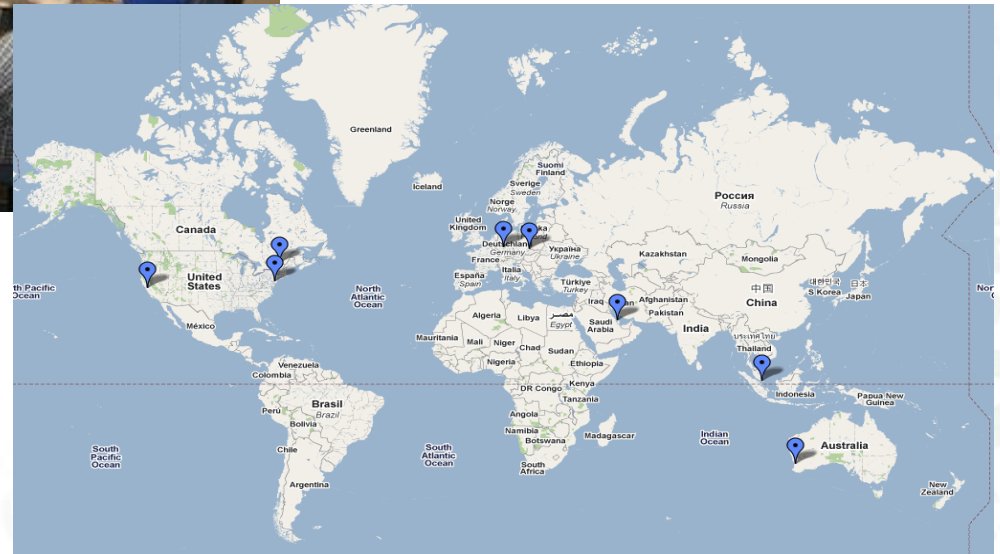
Your Options from OSIsoft….

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OSIsoft and the EA Services Team

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To Learn More About the EA
Room: Imperial B

- Imperial B – Tuesday 3:30 – 4:30
  - Managing your PI System in Real Time
- Imperial B – Tuesday 5:00 – 6:00
  - The EA Extranet 2010 – Customer Communications Software
- Imperial B – Tuesday 6:00 – 7:00
  - The Value of Managed Services and Managed Software
- Imperial B – Wednesday 8:00 – 8:50
  - Extending Customer Support Via Enterprise Services
- Imperial B – Wednesday 9:10 – 10:00
  - Gaining More Value from Your Enterprise Agreement

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Thank you

Project Phases and Roles

Scope & Roadmap	VRP Planning	Project Phases			

Define Architecture for Infrastructure & Applications	Architecture	Roadmap			

Rollout Plan	Tasks	Roles	Dependencies		

Install by FSE	Install HW & OS	Install PI Systems	Data Migrations	Layered Products	

Training	Users for Infrastructure	Developers for Applications			

Applications Do While Loop	1-N Apps	Application Approach	Proof of Technology (If needed)	Build Application	Value Checkup

Operations & Support	mPI	NOC	Infrastructure Upgrades	On-Line Support	Phone Support

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Step Change Process

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Project Phases and Roles

Phase					
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