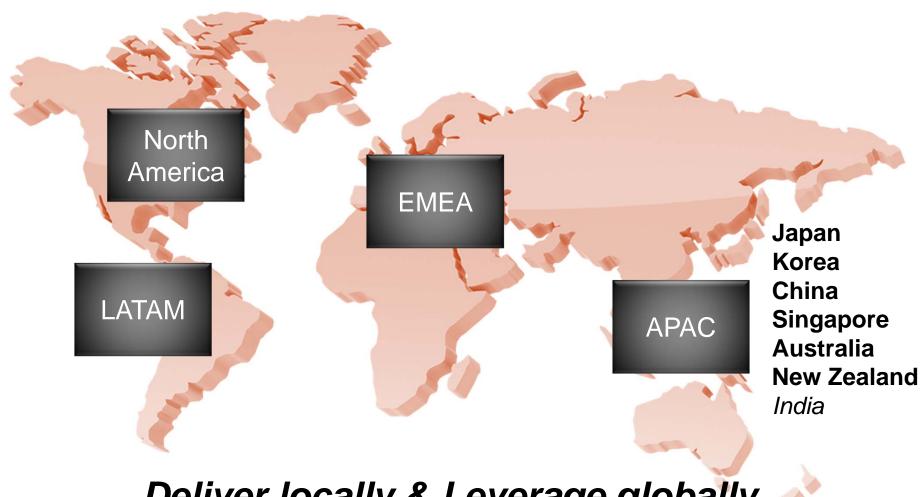


# Customer Advisory Services & Enterprise Agreements

Presented by Pierre Tremblay
Director, Customer Advisory Services
OSIsoft AsiaPac

# **Customer Advisory Services** Global Structure



Deliver locally & Leverage globally

# **Customer Advisory Services**

#### to Customers and Partners across all phases of their PI experience

Technical Consultants Experts in PI System and understanding of Business Presentations, demos and value discussions Pre-system engineering and deployment scenarios

Proposals

Deliver effective and accurate responses to Tenders

COE Center of

Excellence

Strategic and Tactical Advisors & Value Realization Process Product and Industry Experts, Best Practices Customized Architecture for Client Needs and Industry

EPM

Enterprise Project Management Primary contact for Customers with Enterprise-wide Agreements Experienced Project Manager for rollout, upgrades and oversight

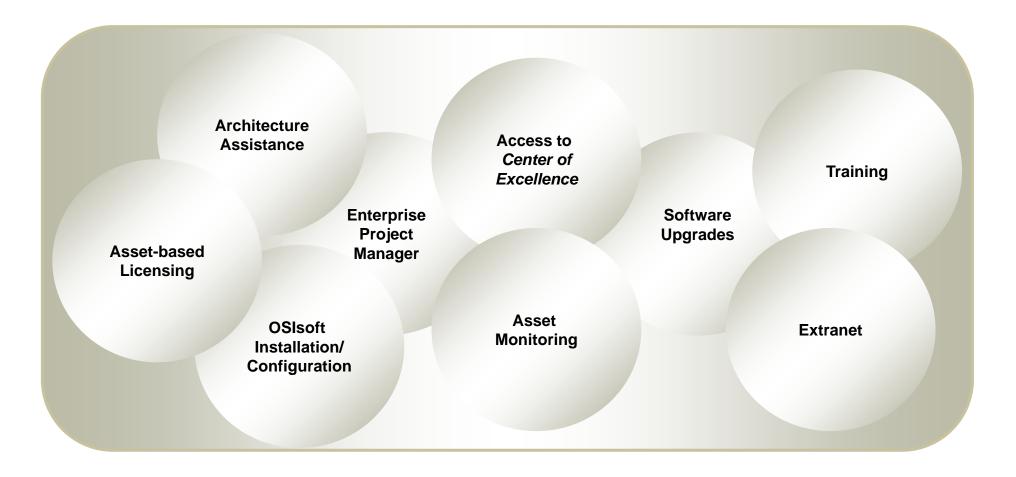
Customer Lab Validate PI infrastructure for a wide range of application areas. Measure performance in uncommon environments.

## **CAS APAC Team Members**

Beili Xiong	Technical Consultant	Beijing
Wang Zhen	Technical Consultant	Beijing
Sam Pride	Center of Excellence Engineer	Melbourne
Bruce Miller	Enterprise Project Manager	Plymouth, NZ
Kevin Won	Technical Consultant	Seoul
Edward Bao	Technical Consultant	Shanghai
Felicia Mohan	Technical Consultant	Singapore
Gina G. Laviste	Technical Consultant	Singapore
Ken Marsh	Center of Excellence Engineer	Singapore
Lee Han Yong	Center of Excellence Engineer	Singapore
Nathawan Hanpadungdhama	Technical Consultant	Singapore
Michael Luo	Technical Consultant	Sydney
Yuhei Inada	Technical Consultant	Tokyo

# **Enterprise Agreement**

Under an Enterprise Agreement, customers enjoy an asset-based licensing model and a range of services based upon 30+ years as an industry leader.



# Key Components of an Enterprise Agreement

**Software** Licensing

- Access to most OSIsoft products for select assets
- Utilize for development, test, or production use
- Includes version updates and patch releases
- Unlimited data streams/tag count

**Enterprise Project Manager** 

- Primary contact for all OSIsoft activities
- Experienced PM to assist with rollout, upgrades, oversight
- Coordinates all OSIsoft EA team members and product experts to ensure EA vision is achieved

OSIsoft's EA delivers services you need to implement and manage PI on an Enterprise-wide basis.

# Key Components of an Enterprise Agreement

Center of Excellence &
Architecture Support

- Strategic and Tactical Advisors
- Product and Industry Experts
- Customized Architecture for Client Needs and Industry
- Value Realization Process

Installation
Configuration
Software Updates

- Remote Installation of OSIsoft products
- Assist with product configuration and tuning
- Pre-Installation Prep and Planning Assistance
- Update system to roll out updates as they become available

OSIsoft's EA delivers services you need to implement and manage PI on an Enterprise-wide basis.

# Key Components of an Enterprise Agreement

Asset Monitoring NOC

- Ensures Higher Availability of PI Systems
- Reduces Customer Staff PI Knowledge Required
- Allows customer to focus on strategic initiatives over maintenance activities

**Customer Extranet** 

- Portal for all EA related activity
- Ability to monitor status of PI systems
- Review and monitor open support calls

**Training** 

- Access to current CBTs and Seminars
- Training Vouchers for Classroom Training
- Customized Training Plan

OSIsoft's EA delivers features you need to implement and manage PI on an Enterprise-wide basis.

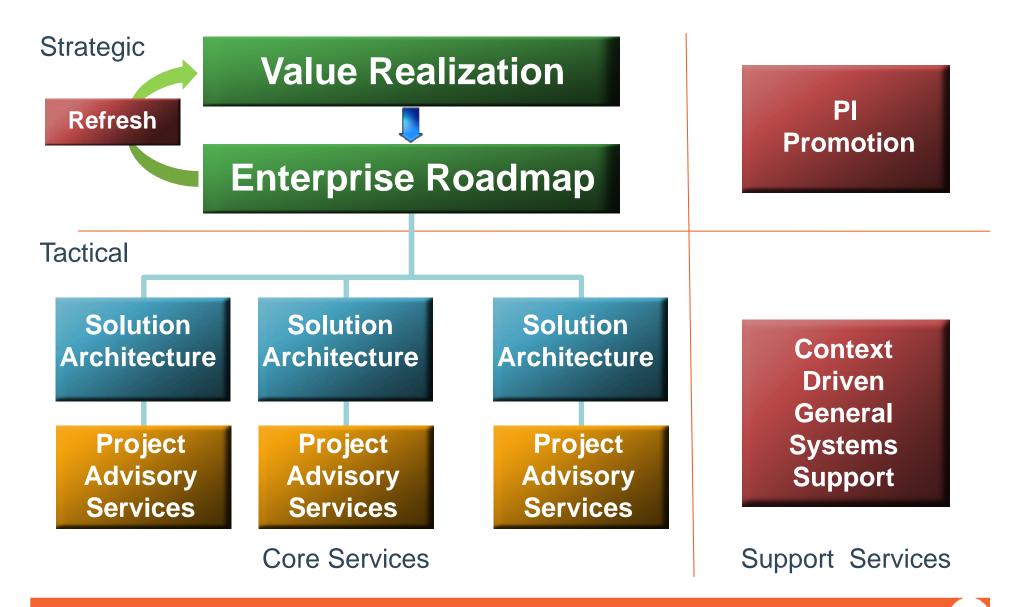
### OSIsoft Support (EA vs Standard)

Service Provided	Standard SRP	<b>Enterprise SRP</b>
24/7 Worldwide Live Support	$\checkmark$	<b>✓</b>
Software Updates and Enhancements	$\checkmark$	<b>✓</b>
Replacement of Obsolete Interfaces	$\checkmark$	<b>✓</b>
On-Line License Management	$\checkmark$	<b>✓</b>
Live Chat with Support Person	$\checkmark$	<b>✓</b>
Access to OSIsoft Training Webinars	✓	$\checkmark$
Access to the Center of Excellence Support		$\checkmark$
Assigned Enterprise Project Manager		$\checkmark$
<b>Enterprise Oriented OSIsoft Technical Team</b>		<b>✓</b>
Architecture Review and Business Value Map	ping	$\checkmark$
OSIsoft Software Installations		<b>✓</b>
Quarterly and Annual EA Progress Reviews		$\checkmark$
Remote System Performance Monitoring - Ma	anaged PI	<b>✓</b>
Annual Training Vouchers		$\checkmark$
eplacement of Obsolete Interfaces n-Line License Management ve Chat with Support Person ccess to OSIsoft Training Webinars ccess to the Center of Excellence Support signed Enterprise Project Manager nterprise Oriented OSIsoft Technical Team chitecture Review and Business Value Mapping SIsoft Software Installations uarterly and Annual EA Progress Reviews emote System Performance Monitoring - Managed PI nnual Training Vouchers nnual User Conference Vouchers campus Access and vCampus Live Vouchers		<b>✓</b>
vCampus Access and vCampus Live Vouchers	S	<b>✓</b>
Customer Specific Extranet Site		<b>✓</b>

# **Business Results based on your Real-Time Data Infrastructure**

RE	DATA & QUIREMENTS	TURNING REAL-TIME DATA INTO ACTIONABLE INFORMATION	RESULTS				
•	ENERGY AND RESSOURCES USAGE		ENERGY AND RESSOURCES MANAGEMENT	•			
entrem entrem	EQUIPMENT STATUS	DATA INFORMATION ACTIONS	CONDITION- BASED MAINTENANCE				
	KNOWLEDGE PERENNIALITY		KNOWLEDGE TRANSFER AND RETENTION				
M	PROCESS CONDITIONS	PI BUSINESS DECISIONS INFRASTRUCTURE	PRODUCTION OPTIMIZATION	1			
(L)	ENVIRONMENTAL REQUIREMENTS AND REGULATIONS		COMPLIANCE	THY I			

#### Center of Excellence Services



#### **Value Realization Process**

Discover Value

**Discuss Timeline** 

Develop Possible Solution Architectures

#### **Discover Value**

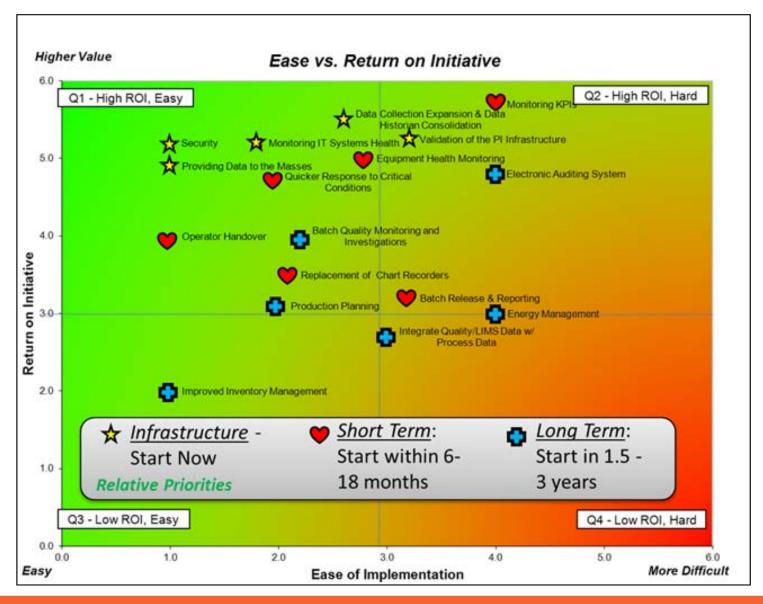
#### Joint OSIsoft & customer meeting at customer site:

- Review & discuss customer high level needs
  - General Value
  - Asset Performance
  - Operational & Maintenance
  - Enterprise Visibility
  - Sustainability
  - Overall PI Infrastructure
- Review & discuss current customer environment and plans
  - Current infrastructure and dependencies
  - Corporate initiatives that could impact Value

## **Possible Solution Architectures (Value Targets)**

Better Data Qualit	y										
Many customers active	Visualization/Dashboar	-ds	<u> </u>								
symptoms of stale data	visualization, businoui	· CLD	CBM								
This topic can very easil	Many OSIsoft customers have	deployed									
clearly defined scope, s	portal application. This type of										
(internally or by 3 <sup>rd</sup> part	and relational data such as LIM		1								
cases where bad or mis		-									
be solved through detail	the organization. A portal solut										
solutions that can help	Management KPI's (production										
PI.	The flexibility of the portal solu		l equipment conditions such as run time, equipment cycles, filter deltar, status signals, etc. These								
	from one business area to anot		' I reports/spreadsheets can be presented in the desktop client format or in the SharePoint portal format								
Recommended Initiat	of solution (with proper securit	ty design	using DataLink for Excel Services when Company has implemented that environment. The reports are								
	The effort to deploy a portal so	dution ct	simple to configure by a novice PI user but can also be formalized and deployed through a more secure								
			I Change Control process.								
	envision what data will be disp										
Value T			fine The PI System provides opportunities for standards-based integration with external, transactional								
n 1 . (m 1 (c	required to collect all the desir										
Products/Tools/Ser	envisioned solution to the end	users in o	rde configured to send equipment condition readings (such as run hours, equipment cycles) to Maximo								
	value of the solution before pr	oceeding	to through the use of PI Notifications and its XML delivery channel. This integration is achieved through								
			configuration of off-the-shelf products without the need for programming. Company should explore the								
	Recommended Initiative(s):	<ul><li>Dev</li></ul>	elo requirements for setting up a pilot integration between PI and Maximo in order to evaluate the value of								
		PI V	/et this integration.								
	Walasa Tananak		Company is currently running a pilot with SmartSignal at the Station. The scope of this pilot includes								
	Value Target:	Pro	I non-compressor rotating equipment. The SmartSignal EPICenter product can predict diagnose, and								
		Pro	prioritize critical equipment and process failures. SmartSignal's products use the PI SDK and AF SDK for								
			bidirectional connectivity with the PI system.								
	Products/Tools/Services:	PIS	erv								
		PI V	/et Recommended Initiative(s):   Develop an initial CBM model to determine basic equipment run								
		PI A									
		PI D	ata Development of integration with Maximo								
		EA :	<ul> <li>Continued development of integration with SmartSignal</li> </ul>								
		stra	teg Value Target:   Enhance the life cycle of the assets								
		EA :	c Lilliance the life cycle of the assets								
		<ul><li>EA :</li></ul>	beeredse manner and e costs								
		con	T.								
		con	Products/Tools/Services: PI Server								
			● PI ACE								
L			<ul><li>PI ProcessBook</li></ul>								
			<ul> <li>PI DataLink for Excel</li> </ul>								
			<ul> <li>Microsoft SharePoint</li> </ul>								
			<ul><li>SmartSignal</li></ul>								
			Maximo								
			<ul> <li>EA Services: CoE to advise on proper integration and analysis</li> </ul>								
			strategies								
			EA Services: CoE architecture recommendation								

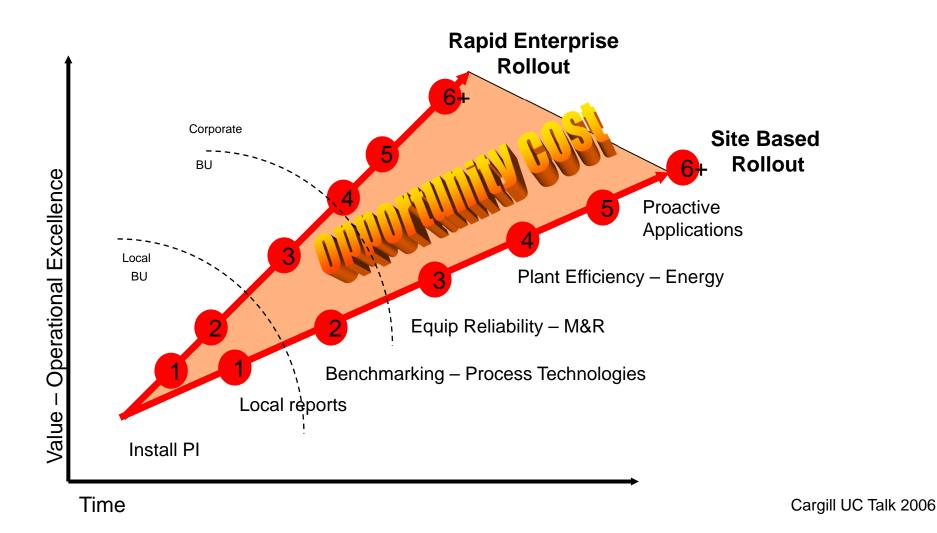
#### **Establish Priorities**



# **Develop Timeline**

	Timeline of Initiatives	Aug'10	Sop '10	Oct '10	Nev '10	Dec'10	Jan '11	Fab '11	Mar'11	Apr'11	May '11	Jun'11	Jul'11	Aug'11	Sop'11	Oct*11	Nov'11	Dec'11	Jan '12	Fab '12	Mar '12	Apr '12	May '12	Jun'12
*	High Fidelity Data Collection	45%	45%	45%	45%	45%	45%																	
	Centralized Database			35%	35%	35%																		
	Data Visualizations		20%	20%	20%	20%	20%	20%																
ס	Meta-data development	50%	50%																					
Ad	Regulation Compliance							25%	25%	25%	25%													
Initial Value	Notifications Scheme			25%	25%																			
	Fleet Monitoring					30%	30%	30%	30%	30%	30%													
<u>=</u>	KPI Framework						25%	25%	25%	25%	25%	25%												
	Report Generation				50%	50%	50%			50%	50%	50%												
	Security Model							20%	20%															
Ę	Configuration Change Management											50%	50%	50%	50%	50%	50%							
3 Term	Condition Based Maintenance												50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%
Long	Vibration Data Collection																		50%	50%	50%	50%	50%	50%

# **Leveraging Rapid Enterprise Rollout**



## **Enterprise Agreement (EA) Foundation**

#### **Planning**

- Value Realization Process
- Enterprise Architecture
- Training Plan
- Rollout Plan
- Site Installation Prep

- Project Reviews
- Software Updates
- Roadmap Review
- Mini-User Conferences

#### Repeat the Cycle

#### **Implementation**

- Field Service Engineer
- Product Installation
- Install Status Communication
- Coordination with NOC

- Ongoing EPM Support
- Ongoing COE Advisory Role
- NOC Engineer Support
- System Intelligence via Extranet

**Maintenance and Support** 



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