Case Study
Follow up work orders

Client Background

Shell is well known as one of the five major national suppliers of petroleum products. Shell has a proud record of presenting a global brand and an extremely high level of compliance with safety and environmental standards. Shell supplies their fuel and convenience products through a vast network of retail and commercial sites across South Africa, with many assets in constant daily operation. Shell has over 400 retail sites nationally that are maintained by Pragma through the Facilities Management Centre (FMC).

Key challenges

Critical equipment inspections (CEIs) are performed on the critical equipment at Shell retail sites. Some inspections are statutory requirements and each inspection is scheduled according to specified intervals.

During CEIs, the L3 contractors work through the relevant inspection checklist. Sometimes a faulty asset is found, but no work may be completed on the inspection visit. Contractors leave feedback on the job card that needs to be followed up manually by the FMC. If necessary, a new work order must be created for repairs.

This process is time dependent on the L3's administration and the asset can be left in a faulty state. It is also time consuming for the FMC and is open to human error.

In addition, there is not a formal check in place to ensure that 100% of CEIs are followed up.

"Convenient to electronically capture which assets need repairs while on site and peace of mind knowing repairs will be completed."

"Previously we had to log a job with the call centre to create a follow-up work order; now it is automatically escalated."

L3 Contractor

Value Add

- On the Work Manager App, the contractor can directly input the pass or fail information as they work through the CEI.
- In addition, they can provide any details about the faulty asset.
- The CEI feedback process flows more smoothly and can be handled efficiently by the FMC.
- The CEI follow-up repairs cycle has been shortened, minimising human error and improving staff utilisation.
- The process enhancement will confirm the full potential of CEI, ensure maintenance issues are repaired timeously and reduce reactive work which was already identified in the CEI.
- The changes have been implemented in On Key and the Work Manager App. Contractors have received training in the new method by the Operations Administrator.
- The FMC plans to extend this improvement and functionality to another process.

Tools and Technology

- On Key Enterprise Asset Management System
- Work Manager App
- Root cause analysis
- Process flow analysis
- Focused Improvement.

Pragma Intervention

- The FMC identified the gap and initiated a project to improve the process.
- It was decided to proceed with a technological solution using and enhancing On Key. The solution would also be applied to the recently released Work Manager App.
- Pragma Products was brought on board to provide On Key development support.
- The solution implemented is the following: Each check item of the inspection is listed as a task on the work order that must pass or fail the inspection. If a task is failed by the contractor, then a follow-up work order is automatically generated in On Key for that site. This is the work order for the contractor to go back to site to maintain the faulty asset, based on the inspection feedback. The work order is linked to the original CEI for analysis purposes for the FMC.
- An On Key profile has been produced to check that if a work order has a failed task, a follow-up work order is created and closed out. Any discrepancies are investigated.