Quick Tour



ReliaSoft

Xfmea/RCM++ 2018 Quick Tour

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Quick Tour of Xfmea and RCM++

Xfmea facilitates data management and reporting for all types of FMEA (including Design FMEA, Process FMEA, FMECA, etc.). It also supports related analyses such as P-Diagrams, DVP&Rs (Test Plans), Design Reviews Based on Failure Mode (DRBFMs), Process Flow Diagrams and Process Control Plans.

RCM++ facilitates the **Reliability Centered Maintenance (RCM)** approach for creating effective scheduled maintenance plans. It supports traditional RCM decision logic diagrams, and also offers simulation/calculation engines to compare maintenance strategies based on cost and availability.

Answer a wide variety of questions such as:

- What is the risk in a product or process?
- Which components or assemblies pose the greatest risk?
- What failure modes might occur? What is the effect of failure?
- What controls are in place to mitigate the risk?
- What tests need to be performed?
- How can we improve the design?
- How should we plan for scheduled inspections and maintenance?

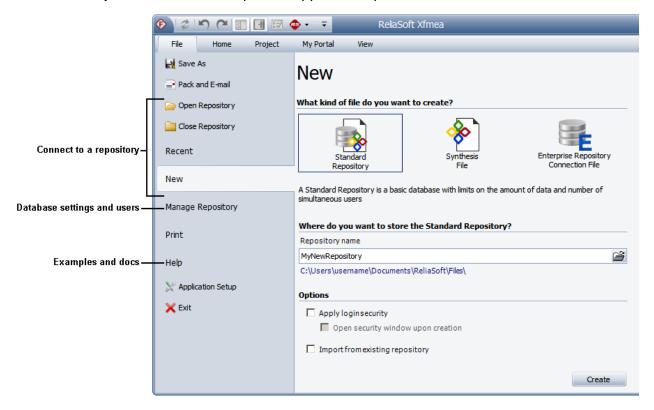
Using Repositories and Projects

File Menu

Use commands on the **File** menu (**New**, **Recent** or **Open Repository**) to create or open a *Synthesis repository* (database).

Each database supports simultaneous access by multiple users. If you have admin permissions, use **File > Manage Repository** to control user access and manage configurable settings that apply throughout the database.

Use **File > Help** to access online help and shipped examples.



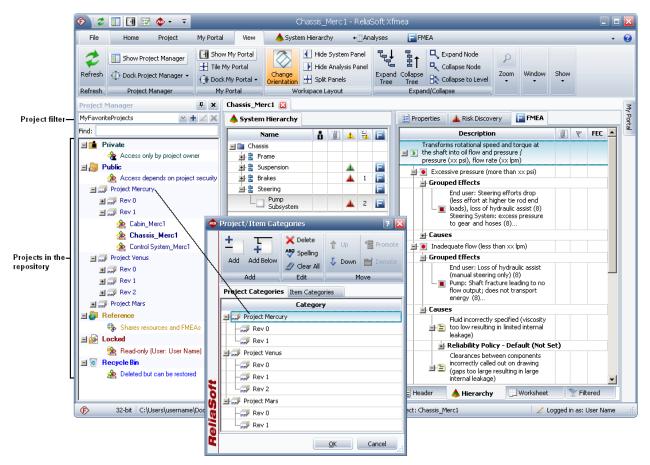
Project List

Each database can contain multiple projects. Use the **project list** to create or open a project.

If you have a lot of projects:

Use the project filter to limit what's displayed.

Use the project category to group projects within the list.



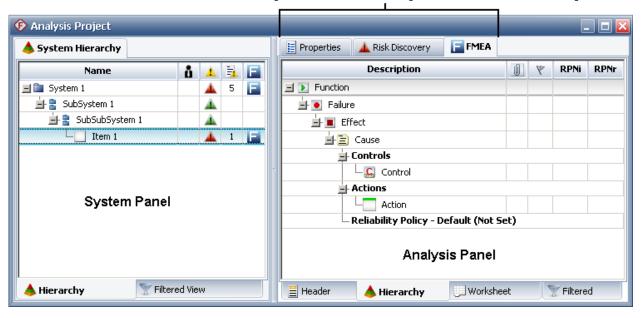
System Panel and Analysis Panel

The **System panel** shows the items that may be analyzed in the project.

- It can be a single item or a complex multi-level system configuration.
- It can be physical components/equipment or steps in a process.

The **Analysis panel** shows properties and analyses for the item that is currently selected.

These tabs allow you to view different analyses for the item that is currently selected.



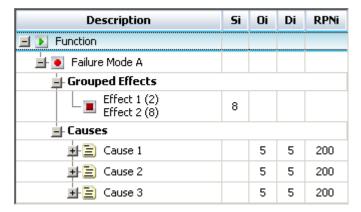
Project Properties

FMEA Structure

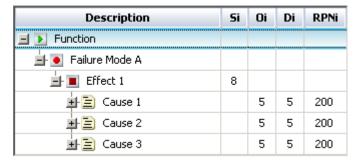
Each project has an **FMEA structure** that will be the same for all FMEAs and RCMs in the project.

Grouped Effects and Causes (commonly used for FMEA)

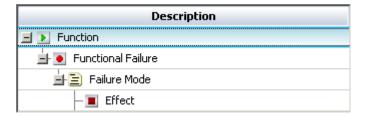
The effects will be entered as separate records but displayed together in the FMEA; the software calculates RPNs based on the highest severity rating.



• Effects Before Causes (can be used for FMEA or RCM)



• Causes Before Effects (sometimes used for RCM)



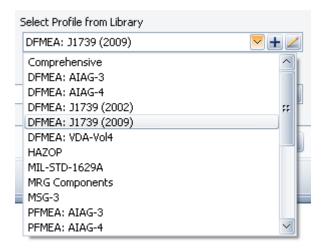
Configurable Settings

Each project also has its own **configurable settings** that enable you to customize:

Quick Tour of Xfmea and RCM++

- Data fields and names
- Classifications, categories and other drop-down lists
- Rating scales and preferences for FMEA risk priority metrics
- Logic for risk discovery and RCM decision charts

Use the **Select Profile from Library** option in the project properties to quickly apply a predefined group of settings.



Using FMEAs

Failure Modes and Effects Analysis (FMEA) and Failure Modes, Effects and Criticality Analysis (FMECA) are methodologies designed to identify potential failure modes for a product or process, to assess the risk associated with those failure modes, to rank the issues in terms of importance and to identify and carry out corrective actions to address the most serious concerns.

The basic steps for using an FMEA are:

1. Create the project and set project properties

Choose Project > Management > Create Project.

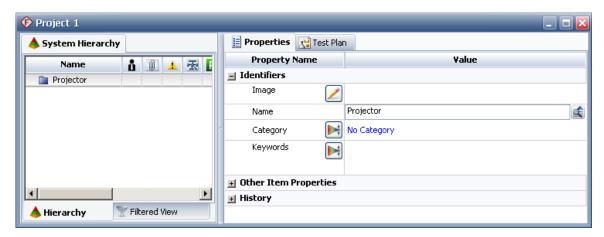


In the Project Properties window, specify the **FMEA Structure** and the **Profile** that will be used to set the configurable settings.

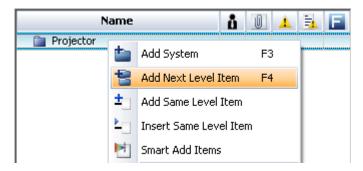


2. Add items in the system hierarchy

The first item is added to the system hierarchy when you create the project. Use the Properties tab in the Analysis panel to rename it and set other properties.

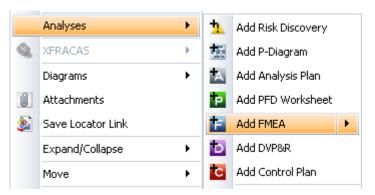


To add items, right-click inside the system hierarchy and choose **Add System**, **Add Next Level Item**, etc.



3. Add a new FMEA

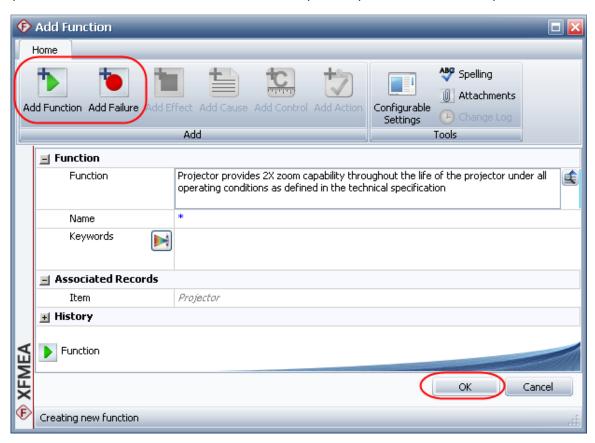
To add an FMEA for an item, right-click the item in the system hierarchy and choose **Analyses > Add FMEA**.



4. Add records in the FMEA hierarchy

The Hierarchy tab for an FMEA displays the analysis records in a hierarchical tree, which tends to be good for viewing a lot of information in a small amount of space. In this view, you will use properties windows to add or edit FMEA records.

When you add a new FMEA, the Function window will automatically open. Enter the details and click either **Add Function** (to add the next function description), **Add Failure** (to add the first failure mode for this function) or **OK** (to close the window).

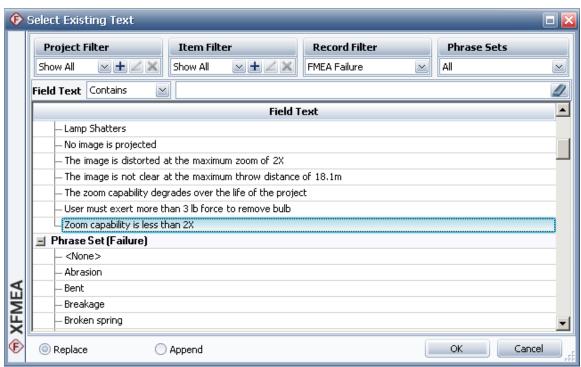


5. <u>Use Select Existing Text utilities</u>

The Select Existing Text window provides a list of existing descriptions that might apply to the current text field or analysis.

If you want to use this utility to replace or append text in an input field, click the icon next to the field.





The Select Existing Text window can also be used to add multiple records at once. For example, right-click a function record and choose **Add Multiple Failures > Select Existing Text**.

6. View RPNs and related metrics

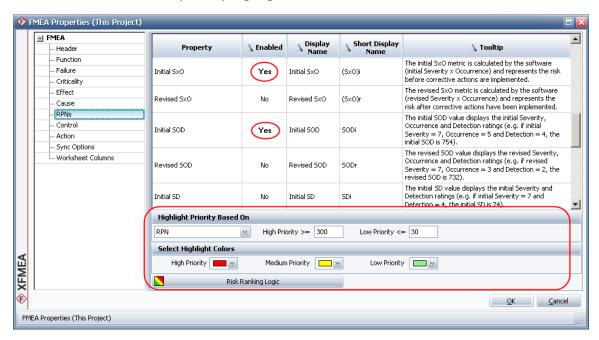
You can choose to calculate and display a variety of metrics based on the Severity, Occurrence and Detection ratings that have been assigned for effects and causes in the FMEA: RPN, SxO, SOD, SD or QCPN.

To configure the metrics that are enabled for the current project, choose **FMEA > Tools** > **Configurable Settings**.

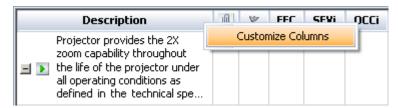


On the RPNs page, use the Enabled column to specify which metrics will be available in the current project.

Use the **Highlight Priority Based On** area to configure the logic that will be employed when a user turns on the priority highlights feature.



To choose which metrics will be displayed in the FMEA hierarchy for your computer, right-click a column header in the FMEA and choose **Customize Columns**.



To turn on priority highlighting, choose FMEA > Tools > Highlight Priority.

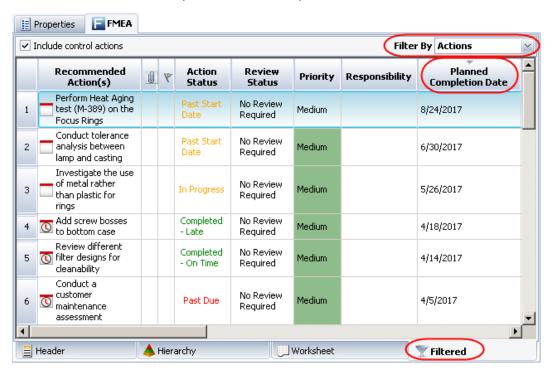


7. Use the filtered and worksheet views

a. Filtered view

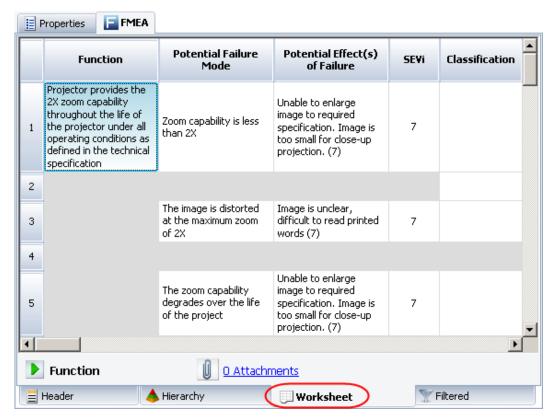
Click the Filtered tab at the bottom of the FMEA to open the filtered view. This view presents a sortable list of all records of a particular type, such as causes sorted by RPN or actions sorted by due date.

Use the **Filter By** drop-down list to select which records are displayed. Then click inside the column header you wish to sort by.



b. FMEA worksheet

Click the Worksheet tab at the bottom of the FMEA to open the worksheet view. This view allows you to type directly into the worksheet cells and tab through the analysis as you would in a spreadsheet application.



To use the entire workspace for the worksheet view, choose **View > Workspace Layout > Hide System Panel**.



To return to a split workspace, choose View > Workspace Layout > Split Panels.

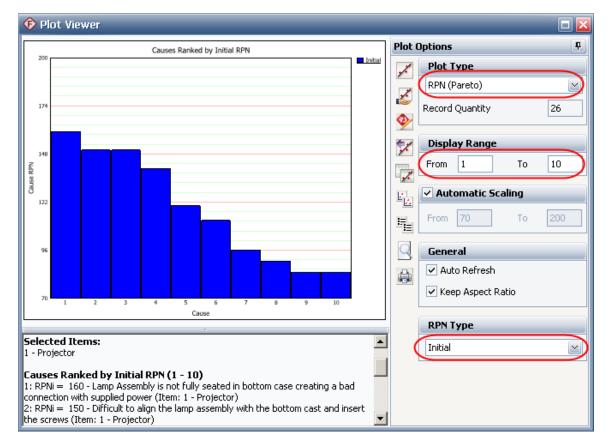


8. Create plots

Choose **Home > Reporting > Plots**.



Select the item(s) that you want to include in the plot. Then use the control panel to select the plot type and other settings.

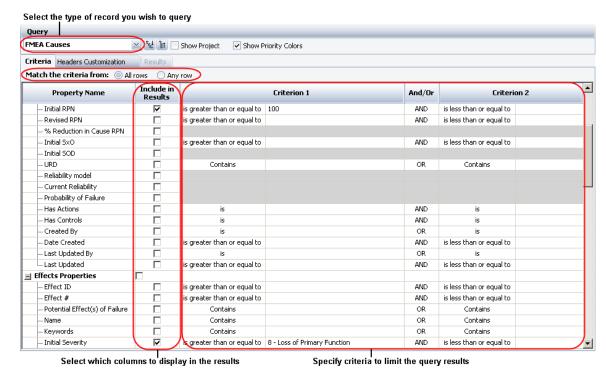


9. Run a query

Choose **Home > Reporting > Queries**.



First use the left panel to specify the data source (selected projects throughout the database or selected items within the current project). Then use the right panel to specify the query criteria and output preferences.



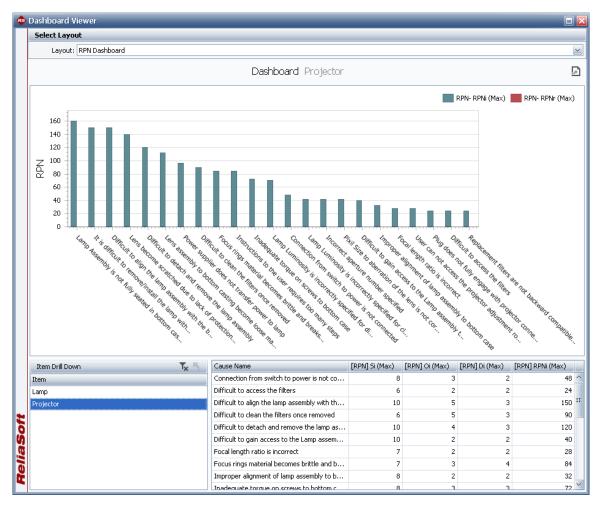
Click **Run Query** to view the records that match the criteria.

10. View a dashboard

Choose Home > Reporting > Dashboard > Dashboard Viewer.



In the **Layout** drop-down list, select one of the layouts that have been predefined for FMEA data and then use the dashboard to view the desired information. For example, in the RPN Dashboard you can click an item in the **Item Drill Down** panel to select which item's data will be displayed in the other 2 panels.

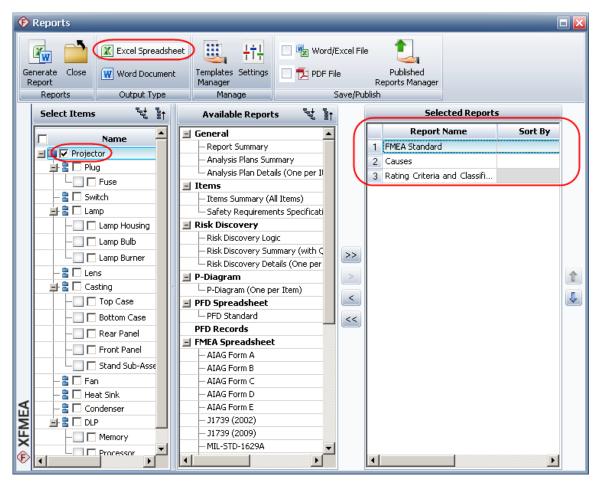


11. Generate a report

Choose Home > Reporting > Reports.



Select the items that you want to create a report for, the report forms you want to include in the generated report and the desired output type (Excel or Word).



Click Generate Report to create the report.

Using RCMs

Reliability Centered Maintenance (RCM) analysis provides a structured framework for analyzing the functions and potential failures for a physical asset in order to develop a scheduled maintenance plan that will provide an acceptable level of operability, with an acceptable level of risk, in an efficient and cost effective manner.

The basic steps for performing RCM analysis are:

1. Create the project and set project properties

Choose Project > Management > Create Project.

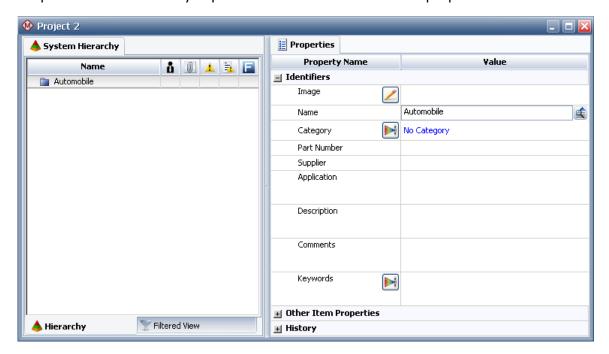


In the Project Properties window, specify the **FMEA Structure** and the **Profile** that will be used to set the configurable settings.

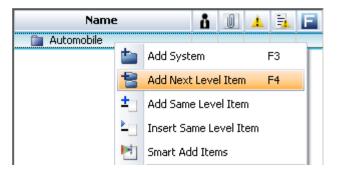


2. Add items in the system hierarchy

The first item is added to the system hierarchy when you create the project. Use the Properties tab in the Analysis panel to rename it and set other properties.

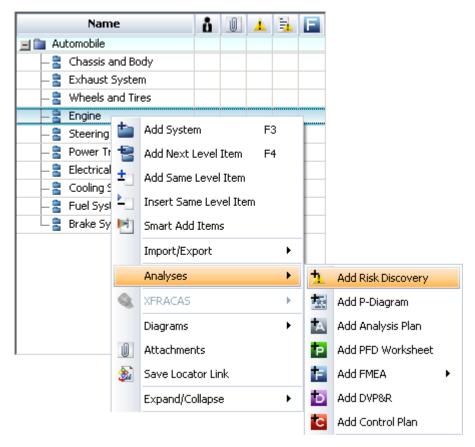


To add items, right-click inside the system hierarchy and choose **Add System**, **Add Next Level Item**, etc.

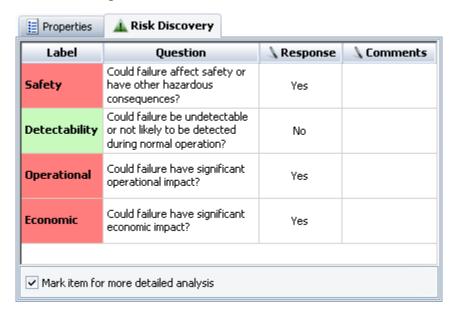


3. Perform equipment selection

For each system hierarchy item that you want to perform equipment selection for, right-click the item and choose **Analyses > Add Risk Discovery**.

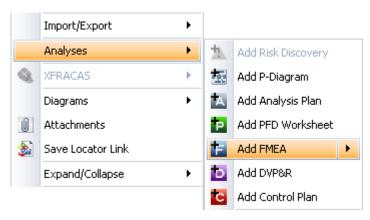


Depending on the configurable settings for the project, this can be a list of yes/no questions or a set of rating scales.



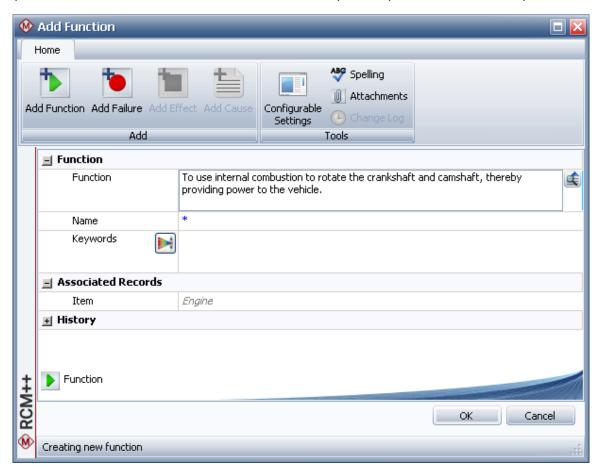
4. Add a new functional failure analysis

Right-click the system hierarchy item that you want to create a functional failure analysis for and choose **Analyses > Add FMEA**.



5. Add functional failure analysis records

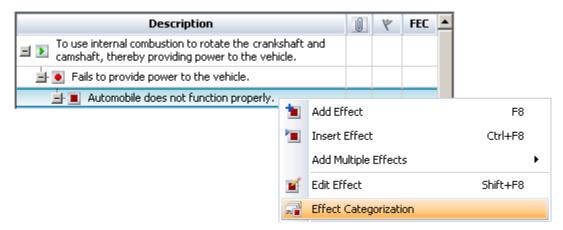
When you add the analysis, the Function window will automatically open. Enter the details and click either **Add Function** (to add the next function description), **Add Failure** (to add the first functional failure for this function) or **OK** (to close the window).



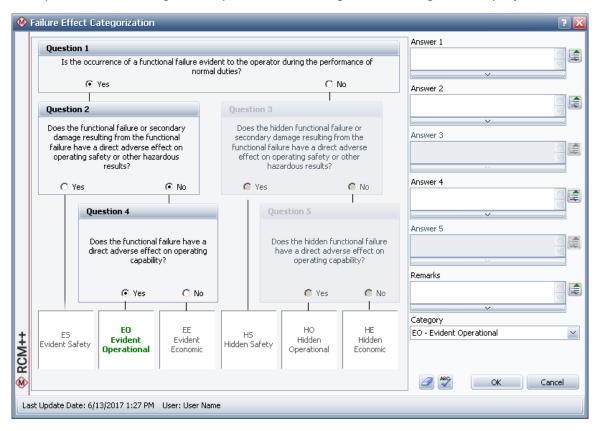
Continue adding analysis records as needed. Note that RCM failure modes are described using the cause record type.

6. Perform failure effect categorization

Right-click an effect in the functional failure analysis and choose **Effect Categorization**.

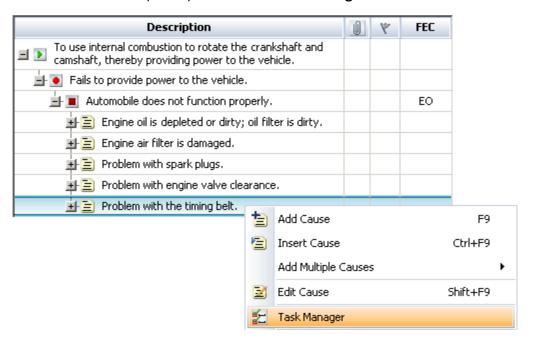


The questions and categories depend on the configurable settings for the project.

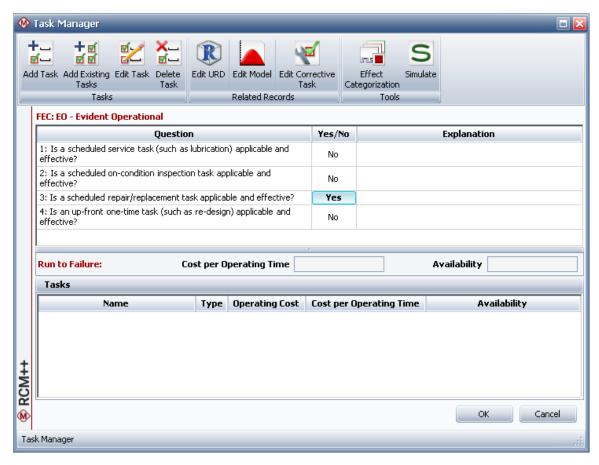


7. Perform maintenance task selection and add a task

Right-click a failure mode (cause) and choose Task Manager.



In the Task Manager, answer the questions by clicking inside the Yes/No column. These questions may or may not be dependent on the failure effect categorization, depending on the task selection logic defined for the project.



To add a task, click Add Task.



• Specify the task name and task type, then indicate when the task is to be performed.



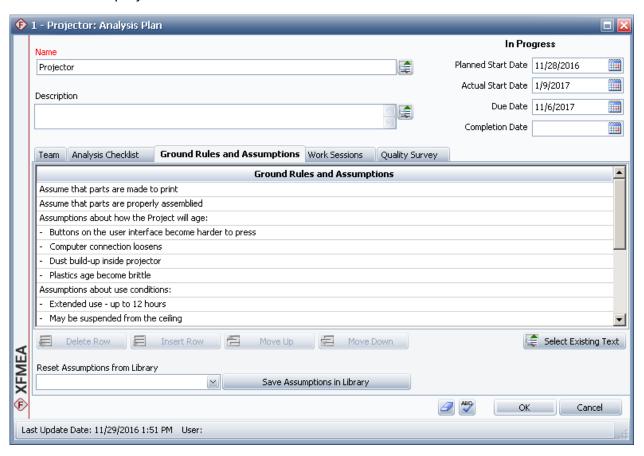
• Continue to specify task properties as needed. The configurable fields for traditional RCM are entered under the **RCM** node.



More Analyses and Tools

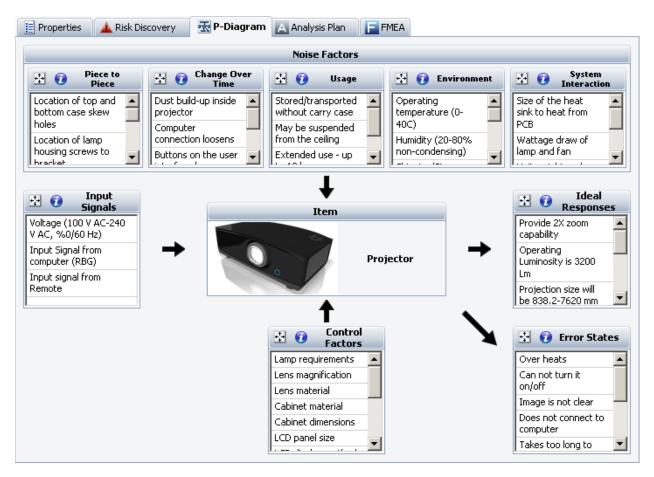
Analysis Plans

Analysis Plans allow you to keep track of team members, ground rules, estimated completion dates, scheduled work sessions and other details that will help you to plan and manage your FMEA and RCM projects.



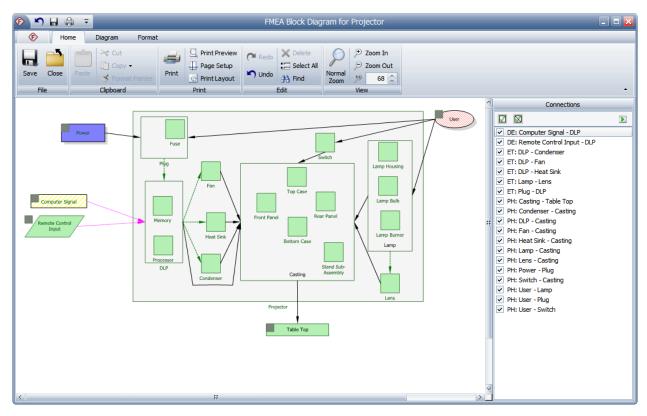
Parameter Diagrams (P-Diagrams)

A Parameter Diagram (P-Diagram) is a structured tool that identifies the inputs from a system and relates those inputs to the desired system outputs, while considering the controlled and uncontrolled factors.



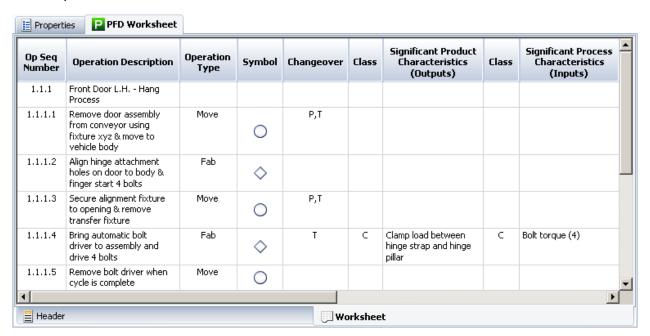
FMEA Block Diagrams

An FMEA Block Diagram visually depicts the system assembly that will be analyzed in a design FMEA. These diagrams help to define the scope of a particular analysis project and also may provide additional information that will be useful to the analysis team when they attempt to identify potential failure modes.



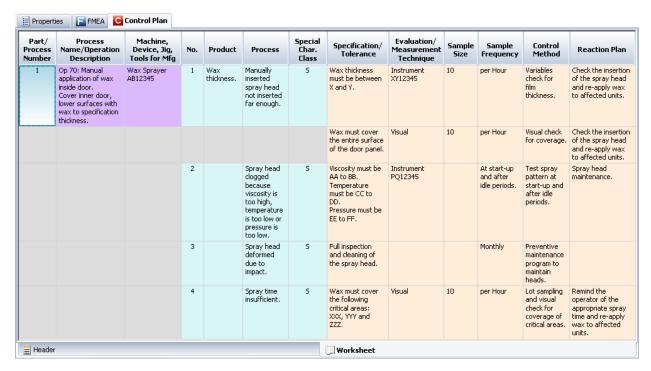
PFD Worksheets

A PFD worksheet records detailed information, including process characteristics (inputs) and product characteristics (outputs), for each step of the manufacturing or assembly process. The complete PFD worksheet provides a structure for preparing process FMEAs (PFMEAs) and control plans.



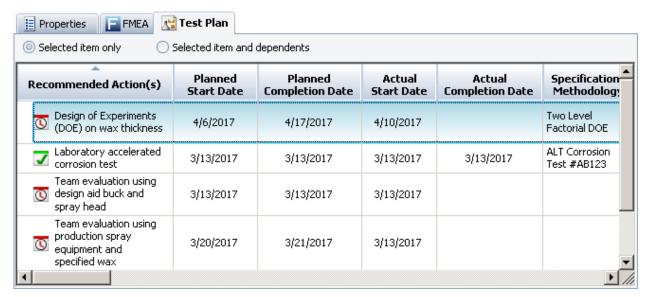
Control Plans

Control plans are used to track critical characteristics that must be kept in control during a manufacturing or assembly process, and record the methods for maintaining control.



Test Plans

A test plan displays a list of actions that describe specific tests that need to be performed.



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