

MUWG Spring Conference
Chattanooga, TN
April 22-25



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MUWG
MAXIMO UTILITY WORKING GROUP

Innovation &
Creativity Using
Maximo

Hosted By:



**TENNESSEE
VALLEY
AUTHORITY**

CONTENTS

Welcome	3
Pre-Conference Activities - Monday, Apr 22	4
IBM Demo Room	5
Day 1 - Tuesday, Apr 23	
General Sessions	6
Kickoff Sessions	7
Afternoon 1 Breakout Sessions	8
Afternoon 2 Breakout Sessions	10
Day 2 - Wednesday, Apr 24	
General Sessions	14
Morning Breakout Sessions	15
Afternoon 1 Breakout Sessions	19
Afternoon 2 Breakout Sessions	22
Day 3 - Thursday, Apr 25	
Training & Certification Programs	24
Partner Meetings	24

WELCOME

On behalf of the MUWG Management Committee, Hello and Welcome to Chattanooga!

As we embark on our twenty-seventh year of service to the Maximo community, we'd like to thank you for your attendance and support. Every day, we seek to provide for you an organization that lives up to our mission to provide a forum for utility members to exchange information, methods, and experiences related to Maximo.

Last year was a successful one. We visited Allen, Texas, hosted by CoServ, and Rochester, New York, hosted by NYPA. We learned a lot about the future of Maximo and where IBM plans to take it next. At this conference, we will take it a step further, as we learn about Innovation and Creativity using Maximo.

Each spring and fall, our committees work to deliver a conference second to none in the Maximo community. Our aim is always to deliver a conference that exceeds your expectations. But we can't do it without you. Each of you has a story to tell and we encourage you to tell it here. Please consider offering a presentation at one of our conferences.

Over the years, there have been many that have supported this organization in a variety of ways. Thank you to our Sponsors, IBM, MUWG Committees and Subcommittees, the MUWG Board of Directors, and MUWG Administration. None of this would be possible without all of us working together.

To the employees of the Tennessee Valley Authority, thank you for once again hosting this conference. We are excited to be in Chattanooga and look forward to one of our best conferences yet.

Please, enjoy the conference, learn something new, connect with old friends, and "GET OUT THERE AND NETWORK".

George Perry
MUWG Committee Chair



DOWNLOAD THE GUIDEBOOK APP

- Locations of Sessions
- Access Agenda & Presentations
- 'Comment' & Rate Sessions
- Complete Overall Conference Evaluation
- Add to Photo Album

PRE-CONFERENCE ACTIVITIES

MONDAY, APRIL 22

Preconference Outing - Southern Belle Chattanooga Riverboat Cruise

10:30a - 2:00p | Meet in Marriott Lobby for charter bus transportation to boat.

Additional fee (\$75) & registration required



See Chattanooga and enjoy lunch and drinks while networking with your peers from the beautiful Tennessee River onboard our private deck on the Southern Belle Riverboat - the best sightseeing tour in all of Chattanooga. Since 1985, the Southern Belle Riverboat has had a simple mission: to provide a unique and spectacular experience of the beautiful city of Chattanooga. Adult beverages, Lunch (Salad, Lemon Basil Chicken, Smashed Potatoes, Grilled Green Beans, Dinner Rolls and Dessert) are included. Special dietary needs can be accommodated.

**Riverboat
Cruise Sponsor:**



**Charter Bus
Sponsors:**



&



MAXTech User Group Meeting - Registration Required

2:30p-4:30p | Signal Mountain (Marriott 3rd. floor)

- MaxTECH is the first ever dedicated Maximo Technical User Group aimed at Maximo Administrators, Developers and Technical Support staff. It is a great place for users to ask and answer technical questions, learn from each other, collaborate and help improve Maximo in your organization. Please [RSVP Here](#) to attend.

MAS Maximo App Suite Discovery Session - Registration Required

2:30p-4:30p | MARRIOTT PLAZA C

- MAS Monitor - Health - Predict - Assist - Mobile - MVI - Reliability Strategies (RCM Accelerator), Why wait - Better together with Maximo Manage
- Discover what you can take advantage of today, integration that exists across the capabilities within the Suite, licensing that encourages evaluating and utilizing additional capabilities to improve operations, infrastructure that enables readily ramping up your environment when more capacity is required, and how the suite can help you progress up the asset management maturity curve. We will have an open discussion on what initial adopters are leveraging and what is available to support your migration. We would like to understand your needs and any concerns that you have. Our objective is to support your nearer-term consideration of the evolution to MAS.
- Stan Smith, IBM Program Director, Maximo Product Management

MUWG First Timers Orientation

4:30p-5:00p | Marriott East / West Room

- Join us to learn how to get the most out of our conference!

Using Guidebook - Conference Mobile App

5:00p-5:30p | Marriott East / West Room

- Learn how to download and navigate MUWG Conference Mobile App.

Conference Registration

5:30p - 8:00p | Marriott Floor 2

- Check in for the Conference to receive badge and welcome gift.

Hospitality Night

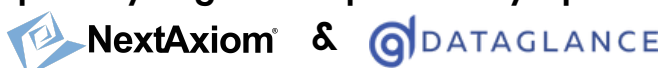
5:30p - 8:00p | Marriott Plaza A / B

Welcome to Chattanooga!

Join us for cocktails, light bites & live music.

Hospitality Night Independently Sponsored by:

Music Sponsor:



IBM DEMO ROOM

The demo room provides an open forum for questions and answers. There are no scheduled presentations, but please bring your questions during the hours scheduled for each subject.

Convention Center Meeting Room 2

TUESDAY, APR 23

1:00p - 2:15p

Maximo - Work and Asset Management
Solutions Engineer: Rick Hatheway
Maximo Mobile
Maximo Technical Specialist: Steven Shull

2:45p - 4:00p

Maximo Scheduler
Lacey Lurges, Maximo Brand Technical Specialist & Pedro Solfa Spadacini, IBM Product Manager

WEDNESDAY, APR 24

10:45a - 12:00p

Maximo for Nuclear Power & Power Generation & Maximo Supply Chain
IBM Product Manager: Donna Grant

1:00p - 2:15p

HSE - Health Safety & Environment
Technical Sales Specialist: Matt Lister
Fleet Management - Transportation Manager
Senior Brand Technical Specialist: James Seeber

2:45p - 4:00p

Maximo Utilities for T&D
Senior Sales Engineer: Edward Warnick
Maximo Monitor, Health, Predict & IBM Maximo Models for Electrical Distribution Accelerator
Solutions Architect: Hannah Carr

CONFERENCE DAY 1 TUESDAY, APRIL 23

GENERAL SESSIONS

BREAKFAST SPONSOR

7:00a-8:00a

**Final Conference Registration
Continental Breakfast**



8:00a-8:30a

George Perry
NYPA

Opening Remarks

- Introductions
- MUWG Business Updates
- Agenda Updates

8:30a-9:00a

**Laura
Campbell**
Supply Chain
VP, TVA



TVA Keynote Presentation - Powering the Future: Navigating Utility Planning with Maximo

Exploring TVA's mission driven approach to a sustainable future. Delve into our integrated resource planning strategies and the vital role Maximo plays in shaping our sustainable energy future.

9:00a-9:45a

**Scott
Hunnewell**
VP - New
Nuclear
Program, TVA



TVA Nuclear Overview

To meet their mission of Energy, Environment, and Economic Development, TVA is exploring new generation technologies to add to their portfolio. The presentation reviews small modular reactor technology as well as the technology initiatives that reach beyond the plant including predictive monitoring with machine learning and interconnected electronic design basis documents.

9:45a-10:15a

Stan Smith
IBM Program
Director,
Maximo
Product Mgt



IBM Maximo App Suite - Product Announcements, MAS 9 & Roadmap Overview

Maximo Application Suite continues to evolve with an expanding focus to cover asset lifecycle and performance management. This summary session will talk about recent updates and our plans going forward for all aspects of asset management including monitoring, mobility, scheduling, AI, sustainability, industry driven functionality, and modernization. This session will be covered in detail in the afternoon breakout session with time there for Q&A.

10:15a-10:45a

MORNING BREAK
NETWORKING & LIGHT
REFRESHMENTS PROVIDED

BREAK SPONSOR



KICKOFF SESSIONS

10:45a-12:00p

Kickoff sessions are an opportunity to meet and network with other attendees that are interested in the same session categories. These sessions typically include introductions, conversation on session category topics and facilitated discussion by MUWG Committee Members.

MUWG SESSION CATEGORIES



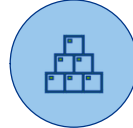
Power
Generation



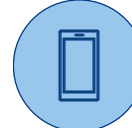
Transmission
& Distribution



Water /
Wastewater



Supply Chain



Mobility



Information
Technology



*General



*Management
/ Manager



*Transportation
/ Fleet



*Maximo 101

*Kickoff session not offered Spring 2024

12:00p-1:00p

LUNCH

A plated lunch to promote discussion among attendees.

LUNCH SPONSOR



AFTERNOON 1 SESSIONS



1:00p-2:15p

IBM Maximo Application Suite - MAS 9 & Roadmap Deep Dive

Stan Smith & Team Members - IBM

Purpose: Innovating Maximo for tomorrow – an update on offerings and roadmap from IBM with interactive Q&A.

Content: Maximo Application Suite continues to evolve with an expanding focus to cover asset lifecycle and performance management. We have expanded our offerings and will continue to grow both capabilities and each of both deployment and management. This session will talk about recent updates and our plans going forward for all aspects of asset lifecycle and performance management including manage, monitor, mobility, scheduling, Reliability Strategies, Accelerators, Omnio Edge Connectors, AI, sustainability, industry driven functionality, and modernization.



1:00p-2:15p

USACE Implementation of Hydropower Project Maintenance Management Plans (PMMPs)

Allison Young & Sharon Ramsey - USACE

Purpose: The U.S. Army Corps of Engineers (USACE) Civil Works oversees and administers an asset portfolio with more than \$250 billion in capital investments and over 1,500 operating projects located in all 50 states, as well as several international river basins. Missions include hydropower, navigation, flood control, recreation, environmental stewardship, and water supply. Maximo was designated as the USACE automated maintenance management system and was deployed in 2010 across the enterprise. Recently, USACE Hydropower Maintenance Practices Working Group acknowledged the need to implement standardized maintenance practices across the enterprise.

Content: This session will present and discuss how USACE met a mandate to provide a mechanism for MSC's to approve maintenance levels and deviations from the Hydro Maintenance Standards (HMS) by creating the Project Maintenance Management Plan (PMMP) application in Maximo. The PMMP application is a sub-set of the Maximo Planning Module. A PMMP record is created for each Hydropower Facility. The PMMP application, while currently housing only Hydropower data, will be rolled out to support other USACE Business Line Maintenance Standards (Flood Risk Management, Recreation and Navigation).



1:00p-2:15p

Maximo Monitor (Enterprise Monitoring at Scale)

Michael Dawson - IBM

Purpose: How can we get alerts from assets that need attention fast? Learn how the data from SCADA systems, and sensors can be leveraged to provide us actionable alerts.

Content: Maximo Monitor is being deployed across industries to identify anomalies and provide alerts to understand when equipment requires attention. Learn how to use an asset hierarchy and streaming analytics to find anomalies fast and generate actionable alerts.



1:00p-2:15p

An Experts' Roadmap: How to Navigate Maximo Mobile to Improve Data Accuracy

Jody Damron - SRP (Recently Retired)

Purpose: Imagine going on a road trip with a destination in mind, but GPS constantly reroutes it and even worse; the scenic journey you planned is mired in thick fog. This is how many Maximo Mobile Users feel after initial investment prior to implementation. You may know where you want to arrive, i.e., correct work orders and service requests associated to the correct asset, etc. but are unsure of how to get there. This includes everything from data validation, to barcoding, and more. If this describes your organization, consider this your roadmap to dispel any confusion from Maximo Mobile.

AFTERNOON 1 SESSIONS

Content: Attendees can expect to learn the following:

- Tips to get started with Maximo Mobile
- How to troubleshoot common errors in Maximo Mobile
- Re-testing best practices for iOS and Android for ongoing efficiencies
- The importance of consistent (and up to date) documentation
- Best practices to ensure Maximo Mobile works after setup
- How to check the accuracy of service requests
- Considerations so labels and barcoding seamlessly integrate with a Maximo Mobile solution
- Benefits gained after implementation

Maximo Mobile implementation doesn't need to be shrouded in confusion. By applying the tips and best practices shared, attendees will have a clear understanding of how to make the goal of data accuracy a reality. Jody will be assisted by Lou Peeples with Camcode.



1:00p-2:15p

Oncor's Mobility Update for Supply Chain - Lessons Learned

Destinie Richter & Sam Leflar - Oncor

Purpose: Over the past 2 years Oncor has custom developed several mobile solutions to streamline Maximo-based workflows in its supply chain and field operations.

Content: Destinie Richter and Sam Leflar will discuss 2 mobile use cases ("Transformer Install, Changeout and Removal" and "Issue Material to Field Operations") successfully rolled out to production and discuss the value created and lessons learned so far.



1:00p-2:15p

Maximo Spatial 9: A Deep Dive into Game-Changing Features for Enhanced User Interaction and Geographic Intelligence

Thiago Geraldi & Thiago Lunes - IBM

Purpose: This session is designed to give you a comprehensive overview of the numerous new features that will revolutionize your experience with Maximo Spatial. Among the standout updates is a new interface that represents a significant leap forward. This interface has been fully modernized and optimized, serving both mobile and web versions. The modernization brings not only aesthetic improvements but also ensures a more intuitive and user-friendly experience. In addition, we will walk you through several other new features/tools. These updates have been carefully crafted to meet the evolving needs of users like you.

Content: Our goal in this session is to equip you with a thorough understanding of these features, enabling you to leverage the full potential of Maximo Spatial version 9. Whether you are a seasoned Maximo user or exploring its capabilities for the first time, this session offers valuable insights into the latest advancements.

Be prepared to discover a more efficient and dynamic way to interact with maps and use geographic intelligence as we unveil the innovative features in version 9. Don't miss this opportunity to better understand and maximize your use of Maximo Spatial. We can't wait to share these updates with you!



1:00p-2:15p

Maximo 101 - What is a Location?

Wayde Prejean - Kinder Morgan

Purpose: The Maximo 101 Track of presentations is designed for those attendees who are evaluating Maximo and Maximo applications, new to Maximo, or have very little experience with Maximo. These sessions are designed to offer high-level information on Maximo capability, uses for various Maximo modules, what is required to operate in specific Maximo modules, and the value provided by them.

Content: This interactive session will take a high-level look into the Maximo Locations and Assets module concentrating specifically on Locations. Discussion will include various definitions of what a location is, how the Locations and Assets module is organized, what information is needed to properly track location information, and value to the organization. Further discussion will include how location information is tied to other Maximo modules to provide the necessary information to make educated business decisions for improved organizational success.

AFTERNOON 1 SESSIONS



1:00p-2:15p

IBM Maximo for Transportation: Sustainable Fleet Management
Ed Jones - IBM

Purpose: Share the current state of Maximo for Transportation and solicit input for the Outcome-Based Roadmap

Content: Find out what the future looks like for fleet customers as we discuss our roadmap and share your plans and pain points as it relates to your fleet assets.



1:00p-2:15p

Con Edison's Maximo Support Model, Empowering a Varied and Growing User Community
Bob Fyke & Anil Sharma - Con Edison of NY

Purpose: Implementation is only the very beginning of the Maximo journey for an enterprise. Expansion, development and demands will soon follow. As users embrace its functionality, they need expert support to help them understand the available tools and the possibilities. Most enterprises have a variety of businesses within the business. As such, there are a variety of use cases and functionalities to be leveraged. A tremendous key to success is the presence of support that understands each business, in addition to IT and other resources.

Content: This presentation will discuss the needs of users and the support model that has worked for Con Ed in its 25 years of evolving Maximo use.

2:15p-2:45p

AFTERNOON BREAK
NETWORKING & LIGHT
REFRESHMENTS PROVIDED

BREAK SPONSOR



AFTERNOON 2 SESSIONS

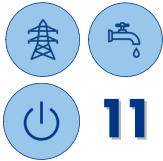


2:45p-4:00p

Maximo Business Process Changes - Keeping Your Guidance Documents Fresh and Functional
Richard Coffland - USBR

Purpose: Did you know that some organizations have manuals on how to draft a manual. It has become an artform to create polices that provide a tremendous volume on Purpose, Scope, and Responsibilities of a topic without detail enough to perform a task. As a result, many of those documents remain in the realm of the unread tomes, archived to history once the online links are broken. Most of us look to our coworkers to get the answers we need to get task completed. A few can share their hard-earned knowledge of quick keys, where clauses, and new trends beyond the realm of our local office. The problem gets worse when a new version of software really shakes things up with improved formatting, sidebars, and drop-down menus. Now what? Fielding teams work for years to ensure there is a solid plan to preserve the data, train the current work force, and keep management informed of progress. Yet routinely we find a new employee who is confused when the manuals they find are a few years old and the screen captures on the handout don't match up to what they see on their computer.

Content: This session will provide a quick look at the guidance side of Maximo. Updating a 'Business Practices' is a process. If you are going to put in the effort, then make the documents something your team will want to use and share. Bonus 'how to' templates will be available for attendees.



2:45p-4:00p

Maximizing Integration: A Comprehensive Use Case for Continuous Asset Management with Maximo Spatial and ArcGIS
Thiago Geraldi, Thiago Iunes, & João Souto Maior - IBM

Purpose: If your company is looking to seamlessly import and synchronize assets into Maximo or aims to enhance its understanding and optimization of data integration bi-directionally between Maximo and ArcGIS, you're in the right place. In this informative session, we are excited to present a comprehensive use case that delves into the intricacies of this integration. Through a hands-on demonstration, we will guide you through the steps of utilizing and understanding each part of this seamless integration.

Content: During the session, we will not only show you the practicalities but also provide an overview of how to analyze reports from this integration effectively. The report is designed to give you an overall picture and insights into areas that require attention, making it easier to identify errors in each integration configured in your environment. Whether you're just getting started with the onboarding process or looking to get a better understanding of how it works, this session is tailored to meet a variety of needs. Join us for a valuable experience, where you will get practical tips and a strategic overview of managing the integration between Maximo and ArcGIS. Don't miss out on this opportunity and join us for an engaging session that promises to empower you with the knowledge you need to navigate and leverage the full potential of Maximo and ArcGIS integration. See you there!

AFTERNOON 2 SESSIONS



2:45p-4:00p

Upgrade to MAS8 (ConEd's Journey)

Anil Sharma & Garrett Chang - Con Edison of NY

Purpose: In an era of an ever-changing technology, it is important and difficult sometimes to keep your organization wide systems up-to-date. With Open Shift Container platform coming into picture replacing websphere, it is important that Organizations have a road map ready so that they can plan in order to upgrade Maximo into Maximo Application suite starting with v8. With IBM just a few months away from releasing v9, see how you can prepare yourself.

Content: This session will provide a deep lens view of what to expect when you decide to upgrade to MAS8. Along with preparing yourself for the upgrade, this would also help you understand and prepare better based on the lessons learnt so that you don't learn it the hard way.



2:45p-4:00p

Maximo Mobile - What is Maximo Mobile?

Vinicius Garmatz & João Souto Maior - IBM

Purpose: What is Maximo Mobile? What can you do with it? What should you be aware when planning for a mobile product implementation? Can I configure it to meet my business needs the same ways as I'd do for Maximo applications?

Content: The intent of this session is to demystify IBM's Maximo Mobile covering what's needed to implement and configure Maximo Mobile, including live demo and use cases around work execution and inspections.



2:45p-4:00p

Safety First - Southern Company's Approach to Managing High-Risk Material

Brandon Williams - Southern Company

Purpose: To show how Southern Company's approach to managing material deemed "High-Risk". Southern Co. defines High-Risk material as anything that, if procured or utilized incorrectly, can result in serious injury or death.

Content: This session will detail how Southern has implemented a new process for identifying, procuring, and receiving High Risk items within Maximo to attempt to minimize the risks associated with these High Risk items. The presentation will cover these processes.



2:45p-4:00p

Capturing Events in Maximo and Reporting

John Hunt Sr. & John Colvin - TVA

Purpose: This session will focus on the use of the Condition Reports (Nuc) application within Maximo to capture events such as Unit Trips, Failed Starts and Derates. Added fields and a workflow modification allows us to route a reported event for initial approval and an automated communication to be sent by email for timely notification of an event.

Content: We will provide an overview of our process and workflow, including the ability to use the captured data for trending and analysis.

AFTERNOON 2 SESSIONS



2:45p-4:00p

Maximo 101 – What is an Asset?

George Perry – NYPA & Rick Ulrich – MUWG

Purpose: The Maximo 101 Track of presentations is designed for those attendees who are evaluating Maximo and Maximo applications, new to Maximo, or have very little experience with Maximo. These sessions are designed to offer high-level information on Maximo capability, uses for various Maximo modules, what is required to operate in specific Maximo modules, and the value provided by them.

Content: This interactive session will take a high-level look into the Maximo Locations and Assets module concentrating specifically on Assets. Discussion will include various definitions of what an asset is, how the Locations and Assets module is organized, what information is needed to properly track asset health, maintenance, and value to the organization. Further discussion will include how asset information is tied to other Maximo modules to provide the necessary information to make educated business decisions for improved organizational success.



2:45p-4:00p

Maximo RFE (Request for Enhancements) Gathering Session

Donna Grant & Stan Smith – IBM & Clay Cook – MUWG

Purpose: Learn the IBM review process, how to approach IBM with ideas and how to write ideas so that they express value and help build a list of enhancements that will be submitted as RFE requests.

Content: This interactive session will give attendees important insight into submitting RFE's and although we cannot guarantee that IBM will include our requests, we will submit a list of requests gathered during this session.



2:45p-4:00p

Putting Maximo Reliability Strategies and AI to Work to Optimize Your Asset Lifecycle

Derek Valine – IBM

Purpose: Learn about how RCM has become a part of the Maximo Application Suite with our new integrated software offering, Reliability Strategies. See how it simplifies the reliability process by employing the Reliability Strategy Library to provide faster time to value with less resources. We will present the current roadmap as well as also collaborate and interact with attendees to help shape the future roadmap.

Content: Learn how Reliability Strategies will:

- Reduce RCM and Failure Mode and Effects analysis study time and resource requirements
- Streamline PM and Job Plan creation
- Automate PM Optimization efforts while balancing reliability and overall cost
- Integrate generative AI into reliability processes

VENDOR NIGHT 5:00p-8:30p

Meet over 40 Maximo product and service Vendors and enjoy an open bar (5:00p) and a full buffet (5:30p).

Please participate in the **Poker Run** and place your vote for the **Best Vendor Swag**. How to participate & rules can be found in Guidebook under the 'Link' tab.

Poker Run – Receive a card from each vendor to create your best poker hand for your chance to win a prize during the closing session.

Best Vendor Swag – Use GuideBook to vote for the vendor you think supplied the best giveaway item.

CONFERENCE DAY 2 WEDNESDAY, APRIL 24

GENERAL SESSIONS

BREAKFAST SPONSOR



7:00a-8:00a

Continental Breakfast

8:00a-8:15a

MUWG Business Information

- George Perry, MUWG Management Committee Chairman
- Clay Cook, MUWG Program Manager
- Terry Saunders, IBM Maximo Liaison

8:15a-9:00a

Leveraging Maximo for Asset Investment Planning and Risk Reduction in Copperleaf at TVA Transmission

Across the utility landscape, there is an ever rising need to build strategies that balance the management of aging infrastructure, load growth, and grid transformation initiatives. Utilities are being pushed to the breaking point as they try to adapt while continuing to deliver service reliably and safely to their customers. Optimizing the performance of assets across their entire lifecycle is more critical than ever before.

This presentation will begin in the early 2010s – highlighting important milestones in Tennessee Valley Authority's (TVA) journey to a risk informed and data-driven asset management program. TVA will reflect on the challenges the organization faced early on, that ultimately led to where they are today and how. We will share how TVA is leveraging Maximo information to feed the Copperleaf asset investment planning solution so that they can maximize investment value, predict future needs, and optimize decision-making in alignment with their strategic goals. He will discuss the journey of identifying, integrating, and developing solutions that link Maximo data across risk management and asset health platforms. Most importantly, Blevins will share TVA's results; specifically, how their reliability numbers have improved based on their use of value-based decision making, and their strategic vision of the future.

Brandon Blevins
TVA



Paul Carter
Copperleaf

9:00a - 9:30a

Think like an Educator about Maximo Training

Learn how CoServ trains new and existing business users to use Maximo. Whether you are working with a Vendor and receive a 'Train the Trainer' as part of a project plan or working on upgrade efforts in-house; as Maximo support staff, we will all be sharing knowledge about the system with our business users at some point. Learn about educational methodology, and best approaches to training users to use Maximo. We will cover training document preparation, process and enhancement training, and new user orientation methodology. Learn how to create your own training lesson plans, valuable artifact training documents, and optimize the learning process for your users.

Ben Smith
CoServ



9:30a - 10:15a

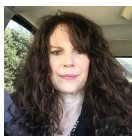
A Good Model for a Maximo Alliance Between Business & Technical Teams

Beginning in 2009, TVA implemented Maximo as its enterprise Asset Management application. A team comprised of business and technical resources was established at that time to provide input, support and best practice recommendations to effectively utilize and optimize the application and represent business needs with an eye on continuous improvement. This team, called the Maximo Alliance Team, continues to this day. This team is a highly engaged and functional organization. The team has bi-weekly meetings where enhancement requests are brought to the team for vetting, issues are discussed, and software releases are planned. Outside regular meetings, the team engages regularly for assistance and guidance on various business and technical issues. One of the unique qualities of this team is how they overcome differences: Consensus is attempted over majority-rule. This presentation discusses an effective process to adequately support Maximo and the user community.

Andrew Williams
TVA



Angie Chambers
TVA



10:15a-10:45a

MORNING BREAK
NETWORKING & LIGHT
REFRESHMENTS PROVIDED

BREAK SPONSOR



CONFERENCE DAY 2 WEDNESDAY, APRIL 24

MORNING SESSIONS



10:45a-12:00p

Mastering Maximo and ArcGIS Integration with the Sync Tool: A Step-by-Step Guide

Lacey Mae Lurges, Thiago Geraldi, & Thiago Iunes - IBM

Purpose: In this informative session, we'll cover the process of setting up the Maximo and ArcGIS integration seamlessly using the powerful Sync Tool. It will be a step-by-step demonstration to equip you with insights, covering everything from fundamental to advanced configurations, ensuring that you take advantage of the full potential available.

Content: Throughout the session, you can expect to uncover a lot of valuable tips that will not only simplify the basics but also empower you to explore the more intricate aspects of tool configuration. Whether you are a novice or an experienced user, our approach will cater to all levels of expertise. As a bonus, let's dive a little deeper into an insightful overview of using the sync report. Learn how to navigate this essential feature and discover some of the actions available, including the ability to reprocess a queue item that was primarily displayed as an error. This ensures that you not only understand the setup process but also gain proficiency in managing/tracking data synchronization through the Sync Tool. Join us on this journey as we demystify the complexities, offer practical advice, and empower you with the knowledge you need to set up and use our out-of-the-box (included with Spatial licensing) Sync Tool.



10:45a-12:00p

Using Maximo HSE as an Safety Information Management System - Part 1: Visualizing the Business Functions of a Safety Department

David Millian, NTMWD

Purpose: The North Texas Municipal Water District (NRMWD) Safety Department provides 6 unique business functions to support water, wastewater, and solid waste services across a 10-county service area. The Safety Department uses Maximo HSE to track and analyze work activities visually using Maximo HSE graphic displays as well as Power BI displays.

Content: This presentation will provide an overview of the NTMWD Safety Department's effort processing data into information for analysis and knowledge brokering.



10:45a-12:00p

Using Geotab (Telematics) Data to Drive PMs and Other Maintenance for AEP's Fleet Assets

Darcie McGinnis, AEP

Purpose: Learn how AEP is utilizing data from Geotab devices to right size PM schedules and trigger other maintenance. What data was useful, what data was too much and became noise, what mistakes we made along the way and what we learned.

Content: This session will discuss using oil life, mileage and engine hours to trigger PM schedules. Using Maximo to consume vehicle fault codes, create WOs, create portlets to track the work and setting an urgency to conduct maintenance. We will also cover lessons learned and cost savings achieved.

CONFERENCE DAY 2 WEDNESDAY, APRIL 24

MORNING SESSIONS



10:45a-12:00p

What the Heck is HEC?

Brian Poirier, Sr. - Deriva Energy

Purpose: Deriva Energy had a need to replace existing Hazardous Energy Control (HEC) forms that were created in InfoPath to a more mobile and supported platform. The decision was made to use Maximo inspection forms as the new platform. Deriva Energy is the new name for Duke Energy Renewables.

Content: This session will present the custom application was created to support this need which allows users to create the HEC forms and route them for approval. Deriva's mobile tool was customized to allow users to perform the isolations in the field and record the results using the forms on their mobile devices. As a result of this project, energy isolation is now directly tied to workorders and assets and can be seen in real time throughout the entire fleet. Auditing of the entire organization's isolation records can be done using PowerBI reporting very quickly. To date, over 2000 HEC forms have been created using this new platform, and over 23,000 isolations have been conducted in the field using these forms.



10:45a-12:00p

Steel Reel Tracking and Inventory Accuracy

Justin Harris & Clayton Bolin - Oncor

Purpose: As part of our relationships with our cable suppliers, Oncor pays a deposit on each steel reel we receive and must return the reels to our vendors in a timely manner. With a service territory of our size, this process requires constant oversight and utilization of Maximo to track return dates, as well as working with our storerooms to ensure the reels are used and returned within the required timeframe.

Content: The The purpose of our presentation will be to show the road we've taken to build new processes and safeguards to enable our storerooms to manage their reels in a more efficient manner.



10:45a-12:00p

5 Key Considerations for Successful Maximo Training: From Implementation to Sustainment

Jason Herman - Evergy

Purpose: In this session, participants will learn about, and review 5 key components related to Maximo training and support and how it was successfully applied at Evergy.

Content: Participants will explore how a positive training experience creates a lasting impact on participants' attitudes, knowledge, and skills, in Maximo and their overall work performance and achieving business success (ROI).

Discussion will include these 5 Key Considerations - Change Management, Needs Assessment and Customization, Learning Strategies, Assessments and Feedback and Sustainment and Support. Jason will be assisted by Neil Summers, Electra Learning.

CONFERENCE DAY 2 WEDNESDAY, APRIL 24

MORNING SESSIONS



10:45a-12:00p

Maximo 101 – Maximo Screen Design
Jade Warren - Great River Energy

Purpose: The Maximo 101 Track of presentations is designed for those attendees who are evaluating Maximo and Maximo applications, new to Maximo, or have very little experience with Maximo. These sessions are designed to offer high-level information on Maximo capability, uses for various Maximo modules, what is required to operate in specific Maximo modules, and the value provided by them.

Content: This session will show how Maximo allows customers to tailor application screens to their business and process needs. We will discuss simple use cases like adding and removing fields, changing labels, and adding color within the context of basic layout and design principles. We will also briefly touch on considerations like cloning screens, security, and how to address conflicting user needs. We will also show how you can use conditional user interface rules to meet data integrity and usability requirements. This session will include on-screen demonstrations within Maximo and will include interactive question-and-answer. Come and learn how you can make your Maximo screens awesome!



10:45a-12:00p

We need to make a change - An Interactive Workshop About the Journey Towards Asset and Work Management Utilizing Maximo
Christopher Bishop, NYPA State Canals

Purpose: This “Boots on the Ground” perspective on creating an Asset and Work Management Program from scratch, details the difficulties and lessons learned when changing a culture. As organizations embark on their journey, understanding potential hidden hazards and roadblocks can offer great value and help to better equip them for success.

Content: Discussion Topics will include:

- Benefits of Changing your Asset and Work Management Program
- Understanding and Communicating Business Needs
- Binding Agreements and Contracts to Consider
- Determining and Assigning Ownership
- Change Management



10:45a-12:00p

PSEG's Strategic Approach to Grid Modernization: Advancing from Condition-Based to Predictive Maintenance

Cody Biondi - PSEG & Carlos Ferreira - IBM

Purpose: Grid modernization remains a priority for PSEG to enhance reliability while actively minimizing O&M costs. Our strategy prioritizes condition-based maintenance for the most critical asset classes. This allows us to transition from reactive to proactive maintenance, fundamentally reshaping our planning approach. By employing consistent methods and tools, we mitigate knowledge loss and embrace a forward-looking model centered on predictive and preventive maintenance aligning with our unique grid requirements for a more resilient and sustainable energy future.

Content: This session will present and discuss how PSEG is employing consistent methods and tools, we mitigate knowledge loss and embrace a forward-looking model centered on predictive and preventive maintenance aligning with our unique grid requirements for a more resilient and sustainable energy future.

12:00p-1:00p

LUNCH

A plated lunch to promote discussion among attendees.

LUNCH SPONSOR



CONFERENCE DAY 2 WEDNESDAY, APRIL 24

AFTERNOON 1 SESSIONS



1:00p-2:15p

Journey Through Maximo Development Challenges
Kenta Kanai - Chubu Electric Power Grid

Purpose: This presentation aims to share insights into the challenging development of Maximo and seek enhancements to address encountered issues. Chubu Electric Power Grid, a major Japanese power company, implemented Maximo as an Equipment and Maintenance Management System (EAM) in April 2023, managing 1.5 million assets and 40,000 Purchase Requisitions annually.

Content: This session will discuss three primary challenges faced before Maximo adoption. Which were extended development periods and high costs, Inefficient Lifecycle Cost Management, and manual double data entry. Maximo adoption proved beneficial by shortening the development period and facilitating seamless linking of work order data, equipment data, and fixed asset data. However, two specific challenges arose during Maximo development and operation: Misalignment of Inspection Rules with Preventive Maintenance and Location and Equipment Relationship Misinterpretation. Addressing these challenges is crucial for optimizing Maximo's effectiveness in asset and maintenance management, ensuring accurate data, and streamlining preventive maintenance practices.



1:00p-2:15p

Southern Gas – Continuous Process Improvement Journey
Laura Ferreira - Southern Gas

Purpose: Southern Company Gas undertook an Enterprise Asset Management transformation program in pursuit of building a world class, strategic Asset Management capability. This included implementation of Maximo, implementation of a common data model, process harmonization, and upgrade of ESRI GIS to Utility Network data model across the company.

Content: Business Process Excellence is a key foundational pillar of achieving the objectives of the transformation program and included a structured approach to achieve continuous process excellence, with changes in the following areas: Process Ownership, Process Governance, and Process Documentation. This session will discuss how continuous process improvement was achieved over the three phases of implementation. Lynn Sutton & Abhijeet Naik, with Black & Veatch will assist with this presentation.



1:00p-2:15p

Creating a Select Action Option to Update PMs in Mass Quantities
Bill Cole, Jeff Condra & Mahesh Eriki - TVA

Purpose: Showcase an alternative solution that TVA is using in lieu of the Import/Export function

Content: Recently TVA Maximo users were asked to start creating PM WOs up to 2 years in advance, due to material availability issues. However, the problem they were running into was that Maximo and the GL software that we were using would not auto-populate to the correct (future) GL number. So, the GL numbers had to be manually entered into each PM. The users started using the Import/Export feature as a means to quickly enter the data. After a few iterations, it was asked if there was an easier or better option inside Maximo. Our Maximo developers came up with creating a new select action feature inside the PM module, which they called "Bulk Update". Using this feature, a user could make a query, then update all those records in the list screen much more efficiently than using Import/Export. A few additional items have now been added to the PM Bulk Update feature (GL, Crews, Initial & Final Risk Assessments, Focus Codes and PM Basis). We did build in some security features to protect inadvertent/incorrect information being added to PMs via security groups.

AFTERNOON 1 SESSIONS

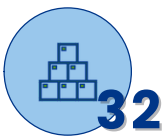


1:00p–2:15p

Configuring Maximo Mobile and Role Based Applications
Steven Shull – IBM

Purpose: Provide an introduction to the MAF configuration application (i.e. App Designer for Maximo Mobile and Role Base applications).

Content: This session includes an overview of the application, its deployment model and product roadmap. The configuration application will be demonstrated by showing simple and more complex configuration examples.



1:00p–2:15p

Maximo Supply Chain Update
Thomas Knowles, IBM

Purpose: IBM lead session which provides supply chain user community with Maximo product updates in the supply chain areas (Inventory, Contracts, Purchasing and Invoicing). Validate strategic direction, priorities on enhancements requests and review the RFE Request for Enhancements process to ensure we are bringing the right set of new supply chain features. We will include open discussion to share what to expect in the supply chain area when upgrading from EAM 7.6 version to MAS.

Content: The majority of this session will focus on the new Maximo Mobile and Role Based Inventory apps that have been delivered and are being designed and developed in future releases of Maximo. The shared content will be a combination of presentation, concept mockups and live demonstration.



1:00p–2:15p

**Maximo Scheduling and Dispatching Dashboard –
Modernize the Experience of Scheduling and Dispatching Work**
Pedro Solfa Spadacini – IBM

Purpose: As part of Scheduling work journey of Maximo, let's explore the existing Features of the Planning and Scheduling module as the new Scheduling Dashboard and Dispatching Dashboard capabilities with the Maximo Optimizer.

Content: Talking about the journey around Plan, Schedule and Dispatch work inside of Maximo leveraging the Mobile for work Execution capability.



1:00p–2:15p

Maximo 101 – Work Orders
Tom Press – APS

Purpose: The Maximo 101 Track of presentations is designed for those attendees who are evaluating Maximo and Maximo applications, new to Maximo, or have very little experience with Maximo. These sessions are designed to offer high-level information on Maximo capability, uses for various Maximo modules, what is required to operate in specific Maximo modules, and the value provided by them.

Content: This interactive session will take a high-level look into the Maximo Work Order module concentrating specifically on Work Order Tracking. Discussion will include various definitions of what a work order is, how they are used, what information is needed to properly track maintenance activities, and plan and schedule work. Further discussion will include how work orders are tied to other Maximo modules to provide the necessary information to make educated business decisions for improved organizational success.

CONFERENCE DAY 2 WEDNESDAY, APRIL 24

AFTERNOON 1 SESSIONS



1:00p-2:15p

Maximo Health and Maximo Predict with Accelerators for Utilities

John Douglas & Carlos Ferreira - IBM

Purpose: This session will explore the latest release and roadmap of Maximo Health, Maximo Predict and the Accelerators for Utilities and include a demonstration and discussion of specific use cases.

Content: Maximo Health and Maximo Predict are applications for a utility to define current asset health and predict asset problems which if not addressed may lead to asset failure or degraded operations. These Maximo Application Suite applications support Asset Performance Management; Asset Investment Planning; Condition and Predictive Maintenance; Situational Awareness. Come listen and see how this solution is being deployed by other Utilities with accelerators to reduce unscheduled asset downtime costs and cost effectively plan an asset's lifecycle.



1:00p-2:15p

Maximo Visual Inspection (Visual Asset Inspection)

Taylor Luong & Tiffany Ly - IBM

Purpose: Automate your visual inspections at scale. Learn how to utilize Maximo Visual Inspection to automate visual inspections of your critical assets, including large infrastructures and assets in hard-to-reach areas.

Content: Maximo Visual Inspection allows subject matter experts to easily create AI vision models for their use case with its point and click software. Learn how MVI has been used for inspections across industries with cameras, mobile devices and drones to catch and prevent failures, reduce manual inspections, and improve production efficiency. See how MVI can also be utilized by Maximo Mobile inspections and work orders and see a dashboard of these inspections and alerts in Maximo Monitor.

2:15p-2:45p

AFTERNOON BREAK
NETWORKING & LIGHT
REFRESHMENTS PROVIDED

BREAK SPONSOR



AFTERNOON 2 SESSIONS



2:45p-4:00p

Understanding Your Work Management Data and Properly Setting it Up to Support the Use of IBM Scheduler

Jesse Price - Clarios, LLC

Purpose: Planning and scheduling has a direct impact on the effectiveness of work performed and workforce efficiency, which impacts overall performance, safety and reliability. The key to success is having your resources and job plan data set up properly to streamline the use of IBM Scheduler.

Content: In this session, we will review what data is needed to support the use of Maximo Scheduler in a multi-site manufacturing facility and how to properly set up Maximo Scheduler to increase planner and scheduler performance. We will also review the benefits of planning and scheduling and provide a list of activities to ensure the foundational data in Maximo is set up to enhance the planning and scheduling processes. Finally, we will review KPIs and measures that we have in place to track our performance. Jesse will be assisted by Matt Midas and Janna Kerr, Maven Asset Management.

AFTERNOON 2 SESSIONS

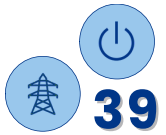


2:45p-4:00p

Hints and Tips on Moving to Maximo Application Suite - Lessons Learned by the IBM SRE Team
Gurmeet Arora - IBM

Purpose: Since early 2021, the IBM Maximo Application Suite Dedicated offering has been migrating / upgrading clients from the existing Maximo EAM application to Maximo Application Suite.

Content: This presentation will discuss some of the lessons learned about the migration and upgrade process. Key elements involved in the planning, important questions to answer, the pre-conditions needed and the upgrade journey itself will be covered. Depending on the choices a client makes, there may be some items to be aware of early to avoid complications later during the upgrade. Every client's journey is as unique as their implementation, but there are common themes regardless of where you currently are and the choices made to move to the Maximo Application Suite.



2:45a-4:00p

How to Use Maximo APIs in Self-Service Automations
John Colvin & Andria Bruce - TVA

Purpose: TVA uses Maximo as its work management system and a separate tool for scheduling generation outage requests (iTOA). After failed attempts to have an official integration implemented between the systems, TVA designed a self-service solution leveraging Maximo APIs, Microsoft Power Automate, and business domain knowledge to automate the process.

Content: This presentation will detail the constraints that led to building a solution in Microsoft's Power Automate and provide enough details for others to build their own solution where appropriate.



2:45p-4:00p

Mastering Maximo Mobile: Streamlining Support with Effective Data Collection and Analysis
Marlon Vincente & Leandro Pastore - IBM

Purpose: The session is focused on enhancing your ability to identify and organize potential issues on Maximo Mobile. We will delve into effective strategies for pinpointing common issues, categorizing, and compiling essential details in a structured manner. This approach ensures a seamless transfer of information when opening support tickets, a crucial step in efficient customer support. Moreover, this session will help you to not only collect the needed details but also help you to become self-sufficient and resolve the issues by yourself.

Content: The session offers hands-on insights into essential tools such as Google Chrome and Maximo Mobile and emphasizes the importance of server logs and memory usage analysis in the troubleshooting process. Roadmap items and new functionalities being developed are also going to be presented during this session. By the end of this session, you will be equipped with the knowledge and skills to navigate mobile issue resolution, empowering you to provide faster and more efficient solutions in the realm of mobile technology support.

AFTERNOON 2 SESSIONS



2:45p-4:00p

Maximo 101 – Item Master and Inventory

Madelyn Woodruff – Southern Co. (Retired) & Destinie Richter – Oncor

Purpose: Maximo 101 presentations are designed for those attendees who are evaluating Maximo and Maximo applications, new to Maximo, or have very little experience with Maximo. These sessions are designed to offer high-level information on Maximo capability, uses for various Maximo modules, what is required to operate in specific Maximo modules, and the value provided by them.

Content: This interactive session will take a high-level look into the Maximo Item Master and Inventory applications. Discussions will include various definitions of what the applications are, what they are used for, what information is needed in them, and how to leverage both applications into other areas of Maximo. This session will include demonstrations within Maximo and an interactive question and answer. This will allow businesses to provide the necessary information to make educated business decisions for improved organizational success.



2:45p-4:00p

MUWG Focus Group – Drive the Future of MUWG

Janie Mann, Vice Chair & George Perry, Chair, MUWG Management Committee

Purpose: At the heart of every MUWG conference are attendees that travel across the country and across the world to be present. This breakout session is YOUR opportunity to provide feedback about this conference, influence the direction that future conferences take, and learn about the organization and what it takes to host a future MUWG conference.

Content: Want to help drive the future of MUWG? This session is for you! Over the past 27 years, MUWG has grown along with our very loyal user community. We've made changes along the way to continue to provide the most value of any Maximo user conference anywhere. We want YOUR feedback. Let's take this time to debrief while it is still fresh in your minds. MUWG Vice Chair Janie Mann and Chair George Perry want to hear from you. Please join us for this very interactive session designed to get your feedback about all things MUWG. We are already planning for YOUR next conference and want you to help us on our quest for continual improvement.



2:45p-4:00p

Why Wait, Let's Make the Business Case to Upgrade to MAS

Tom Woginrich, IBM

Purpose: With the available technologies in Asset Performance Management (APM), AI/ML, Edge and Digital Twin, how can your organization justify their business value and make the case for investment? What are the measures and KPIs your organization should be tracking to reinforce the justification of these technologies? Let's explore the business value opportunities and make the business case to upgrade to Maximo Application Suite (MAS).

Content: Let's explore the business value opportunities and make the business case to upgrade to Maximo Application Suite (MAS).

CONFERENCE DAY 2 WEDNESDAY, APRIL 24

AFTERNOON 2 SESSIONS



2:45p-4:00p

Leveraging the MAS Automation Engine while upgrading from Maximo 7.6 to MAS

Rafael Teixeira & Andre Marcelino - IBM

Purpose: In this presentation, we will embark on exploration of the MAS Automation Engine's capabilities and its integral role in enabling a tactical transition from Maximo 7.6 to the IBM Maximo Application Suite (MAS). As enterprises recognize the urgency for modernization and optimization, the proper planning for a successful migration process becomes increasingly vital. We extend an invitation for you to join us as we investigate the primary features and functionalities of the MAS Automation Engine, demonstrating its ability to simplify the migration process, reduce disruptions, and boost overall efficiency. We will provide practical demonstrations, emphasizing the system's ease of use and the substantial benefits it provides to businesses planning to upgrade their Maximo installations to the advanced MAS platform. Prepare to welcome innovation and tap into the full potential of your Maximo system with MAS.

Content: We extend an invitation for you to join us as we investigate the primary features and functionalities of the MAS Automation Engine, demonstrating its ability to simplify the migration process, reduce disruptions, and boost overall efficiency. We will provide practical demonstrations, emphasizing the system's ease of use and the substantial benefits it provides to businesses planning to upgrade their Maximo installations to the advanced MAS platform. Prepare to welcome innovation and tap into the full potential of your Maximo system with MAS.



2:45p-4:00p

An Update on the Role-Based Work Order and Work Queues Apps, and the operational dashboard in Maximo 8/9

Brian Downey, IBM

Purpose: To show the rapid evolution of new role-based desktop applications and modern, functional designs that come with Manage in the Maximo Application Suite.

Content: Slides and demonstrations will show how the Work Orders app is being enhanced to include Plans for managing tasks, resources and responsibilities. Work Queues are being enhanced to have memberships and to support actionable result sets on any main object. The operational dashboard will deliver new components and support multiple personalized pages per user, integrated with security groups.

4:00p-4:30p

CLOSING SESSION & REMARKS

Please use GuideBook App to complete your 'Session Evaluations' & 'Overall Conference Evaluation' and make your way the closing session which will begin at 4:10. Must be present to win door prize!

PLEASE RATE THE SESSIONS YOU
ATTEND BY COMPLETING THE
STAR RATING OF THE SESSION
USING THE GUIDEBOOK APP



CONFERENCE DAY 3 THURSDAY, APRIL 25

TRAINING & CERT PROGRAMS 8:00A-3:00P
ADDITIONAL FEE (\$395) & REGISTRATION REQUIRED
BREAKFAST 7:00A-8:00A | LUNCH 12:00P-1:00P

Maximo Asset Management Training for Managers, Engineers & Supervisors

Instructor: Clay Cook

Planner Scheduler Certification - Level 1

Instructor: Rick Ulrich

Planner Scheduler Certification - Level 2

Instructor: George Perry

Planner Scheduler Certification - Level 3

Instructor: Matt Midas

MAS Supply Chain Overview

Instructor: Amy Tatum

"Hands On Lab" (bring your laptop) using MAS, including other functionality which is now in MAS such count books and the Supply Chain Maximo Mobile Applications.

Maximo for Business Process Support & Automation

Instructor: Jade Warren

This training empowers attendees to leverage Maximo's configuration tools to effectively support key business processes. We will explore capabilities including database configuration, application designer, escalations & scripting, and more. You will gain an understanding of Maximo's ability to automate and support your business processes – you will learn not only WHAT Maximo can do, but also HOW you can leverage those capabilities to enhance your Maximo implementation.

PARTNER MEETINGS 9:00A-11:00A
PRIOR REGISTRATION REQUIRED

IBM Maximo Nuclear Power Development

To attend, please email Donna Grant - donna.grant@ibm.com

IBM Maximo Location Based Services & Maximo Mobile Development Partner Meeting

To attend, please email Thiago Geraldi - tgeraldi@ibm.com

THANK YOU!



MUWG
MAXIMO UTILITY WORKING GROUP

2024 Spring
4/10/24