

MUWG Fall Conference

Phoenix, AZ
September 16-19



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MUWG
MAXIMO UTILITY WORKING GROUP

Investing in technical
solutions and people
to deliver reliable and
sustainable utility
services

Hosted By:



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DOWNLOAD THE GUIDEBOOK APP

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

WELCOME

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

As our twenty-seventh year of service to the Maximo community comes to a close, we'd like to thank you for your attendance and support. MUWG continues to grow as evidenced by the best attended conference in our history being conducted in Spring 2024 in Chattanooga. With each passing conference, we seek to provide for you an experience that drives business value while staying true to our mission to provide a forum for utility members to exchange information, methods, and experiences related to Maximo.

Each spring and fall, our committees work diligently to deliver a conference second to none in the Maximo community. Our aim is always to exceed your expectations. As this organization continues to grow, we will need you and your contributions more than ever. Our conferences are built on delivering current, experiential learning opportunities that drive business value for the organizations that attend. 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, the MUWG Board of Directors, MUWG Administration, and especially, the MUWG Management Committee. None of this would be possible without all of us working together.

To the employees of Arizona Public Service, thank you for once again hosting this conference. We are excited to return to Phoenix 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



Preconference Outing - Chicken N Pickle

10:30a - 2:00p | Meet in Renaissance Lobby for luxury motorcoach transportation to event.

Additional fee (\$75) & registration required



Pack your tennis shoes and plan to join us for a friendly game of Pickleball at Chicken N Pickle Glendale. A private Pickleball Pro will be available for those new to the game. Not a Pickleball fan? There is something for everyone including cornhole, ping pong, and other yard games. 'Fiesta Street Party' lunch with fajitas (special dietary needs can be accommodated) and all the fixings plus 2 bar tickets and all equipment is included. Come enjoy fun and games with your fellow MUWG attendees!

Activity Sponsor: 

Food & Beverage Sponsor:

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Motorcoach Sponsors:

PRE-CONFERENCE ACTIVITIES

MONDAY, SEPTEMBER 16

IBM Maximo Mobile Applications configuration & customizations

12:30p-4:30p | Registration Required (email Vinicius Garmatz vgarmatz@br.ibm.com)

- Explore the capabilities of Maximo Application Framework tool to configure and customize Maximo Mobile and Role Based applications in MAS.
- A hands-on session to be conducted by IBM Maximo development professionals where the audience is going to be guided on how use the tool to implement, deploy and test the changes done to the applications. Some of the configurations/customizations example scenarios will include:
 - Restrict app actions based on record's conditions
 - Filter lookup selection values based on the type of the record
 - Substitute fields on existing screens by others
 - To define default values to specific fields when new records get created
 - Change application's record queries
 - Add classifications to record (work orders)
- Audience will also have the opportunity to understand about product version upgrade processes (with customizations) & to have questions answered at any time during the session.

MAXTech User Group Meeting

2:30p-4:30p | Registration Required

- 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

2:30p-4:30p | Registration Required

- 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. Facilitator: Stan Smith, IBM Program Director, Maximo Product Management

MUWG First Timers Orientation

4:30p-5:00p

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

Using Guidebook - Conference Mobile App

5:00p-5:30p

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

Conference Registration &

Welcome Reception

5:30p - 8:00p

Welcome to Phoenix!

Check in for the Conference to receive badge and welcome gift. Then, join us for cocktails, light bites & live music.

Hospitality Night Independently Sponsored by:

TRINMAX

&

(SPONSOR)

Music Sponsor:

POLARIS
SOLUTIONS

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.

TUESDAY, SEPT 17

1:00p - 2:15p

Maximo - Work and Asset Management
Solution Engineer: Rick Hatheway

Maximo Mobile
Maximo Technical Specialist: Steven Shull

2:45p - 4:00p

Maximo Scheduler
Maximo Brand Specialist: Lacey Lurges
IBM Product Manager: Pedro Solfa Spadacini

WEDNESDAY, SEPT 18

10:45a - 12:00p

Maximo For Nuclear Power and Power Generation | Supply Chain
IBM Product Manager: Thomas Knowles

1:00p - 2:15p

HSE - Health, Safety & Environment
Technical Sales Specialist: Matt Lister
Fleet Management - Transportation Manager
Sr Brand Technical Specialist: Jim Seeber

2:45p - 4:00p

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

CONFERENCE DAY 1

TUESDAY, SEPTEMBER 17

GENERAL SESSIONS

7:00a-8:00a	Final Conference Registration Continental Breakfast	<u>BREAKFAST SPONSOR</u> (SPONSOR)
8:00a-8:30a George Perry NYPA	<u>Opening Remarks</u> • Introductions • MUWG Business Updates • Agenda Updates	
8:30a-9:00a Michelle Ferrara APS Vice President & CIO	<u>APS Keynote</u> Partnering to Enable Business Transformations Through Technology	
9:00a-9:45a Stacey Micatrotto APS Director, IT Apps 	Mike Melaragni APS SR Director, Strategic Tech 	<u>Large Program Implementation Lessons Learned</u> Large, complex technology implementations are becoming more common within utilities. Despite this fact, many utilities struggle to execute these programs successfully due to the unique challenges they pose. Hear from APS as they share their firsthand experience in leading a large and complex Supply Chain and Work Management transformation to a successful finish.
9:45a-10:10a Stan Smith IBM Program Director, Maximo Product Mgt 	<u>IBM Maximo App Suite - Product Announcements, MAS 9 & Roadmap Overview</u> 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	<u>BREAK SPONSOR</u> (SPONSOR)

CONFERENCE DAY 1

TUESDAY, SEPTEMBER 17

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



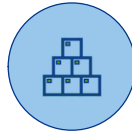
Power
Generation



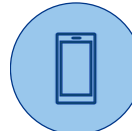
Transmission
& Distribution



Water /
Wastewater &
Pipelines



Supply Chain



Mobility



Information
Technology



*General



*Management
/ Manager



*Transportation
/ Fleet



*Maximo 101

*Kickoff session not offered Fall 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

Training Anyone? The Importance of Comprehensive Training Methods for Success

Sue Brashar - LCRA

Purpose: Maximo is a vast tool that requires a successful training program to successfully implement all of its possibilities.

Content: This session will provide an overview of LCRA Maximo training hits and misses through all of their Maximo upgrades. A brief synopsis of training strategies through Maximo upgrades will be discussed as a guide to stimulate conversation among attendees to create an insight into successful strategies for all agencies. The session will be very interactive discussing all aspects of training for all users.



1:00p-2:15p

Maximo 101 - Job Plans

George Perry - NYPA

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 Job Plan module concentrating specifically on their development and usage. Discussion will include how the Job Plan module is organized and various methods for building Job Plans including what information is needed to properly build job plans to provide value to the organization. Further discussion will include how Job Plan information is tied to other Maximo modules to provide the necessary information to make educated business decisions for improved organizational success.

CONFERENCE DAY 1

TUESDAY, SEPTEMBER 17

AFTERNOON 1 SESSIONS



1:00p-2:15p

You are only as strong as your weakest link A look into the evaluation of rugged mobility with Maximo by SRP
Jeff Breckon - SRP

Purpose: Asset Management and mobility are becoming more and more integral components as technologies advance in today's modern world. With our understanding that field operations are the lynchpin in valid data collection and the critical need for access to historical data. Maximo has been a long-standing solution for both the asset and maintenance management process. From the perspective of success in these systems and the advancement to making them mobile, Maximo and its integrated partners have pushed the envelope in software advancements. Ultimately the intent is to reduce the number of clicks one must make to both access and complete work. That being said, the continuous optimization does not stop as the application is launched or the form is filled out. Project teams are continuously looking to improve the experience in the field with Maximo. Looking for the weakest link in the field workflow is a tried-and-true process and has exposed shortcomings in consumer computer hardware.

Content: This session will highlight the process in which SRP has evaluated the deployment of mobile hardware to support critical enterprise systems such as Maximo. It will present the perspective from the application manager, hardware manager, and end-user side.



1:00p-2:15p

How TVA Leverages Maximo Supplier Portal
Nick Jimmerson - TVA

Purpose: TVA's Supply Chain Maximo representative will perform a walkthrough detailing TVA'S EAM Supplier Portal processes. The presentation will focus on how invoicing customizations have improved the overall effectiveness and optimized efficiencies compared to the legacy invoicing process. The demo will outline how suppliers submit their own invoices as well as how to better manage the Accounts Payable processes that includes better visibility into Maximo's payment process.

Content: TVA Representative will walk through various permission roles & functions we have configured in our Maximo supplier portal. This will include outlining restrictions on what vendors can and can't do while submitting their invoices via the supplier portal. We will demo configurations made to the supplier's Maximo Start Center, including such enhancements as result sets, hotlinks, KPI pie charts and bar graphs, and the interactive dashboard page that helps suppliers better manage their experience in the portal. Next, there will be a detailed walkthrough on how suppliers create and submit their own invoices. The presentation will provide insight on how the suppliers use of the portal can provide better visibility into the payment process such as invoice statuses and what those mean, payment dates, invoice searches, and how a supplier can utilize the early payment discount system to receive payment sooner. And finally, we will wrap up the demo by providing an overview of how the supplier portal invoicing customizations has better helped manage the relationship between TVA and its suppliers.



1:00p-2:15p

Things I Wish I Knew Before I Started Our Implementation Project
Lisa Carrington - APS

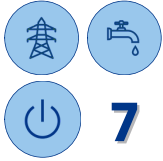
Purpose: TBD

Content: TBD

CONFERENCE DAY 1

TUESDAY, SEPTEMBER 17

AFTERNOON 1 SESSIONS



1:00p-2:15p

Simulated Use Case: Exploring the Full Range of Maximo Spatial Tools

Thiago Geraldi & Thiago Lunes - IBM

Purpose: In this session, we are changing the dynamics from previous events to showcase the latest updates and features of Maximo Spatial through a simulated use case. Participants will be guided through a comprehensive journey exploring the diverse tools and capabilities available within this latest version of Maximo Spatial.

Content: The session will simulate a practical use-case scenario that covers the majority of tools available in Maximo Spatial 9. Attendees will experience hands-on demonstrations of key functionalities such as spatial data integration, spatial analysis techniques, and other critical features. By the end of the session, participants will gain a thorough understanding of how to leverage Maximo Spatial's tools effectively to enhance asset management processes, streamline operations, and make data-driven decisions.



1:00p-2:15p

Generative AI: An intro to MAS 9.0 and AI Broker Integration

Rafael Teixeira & João Souto Maior - IBM

Purpose: Discover how the Generative AI (GenAI) are transforming asset management with the Maximo Application Suite 9.0.

Content: This session introduce you into the innovative integration of GenAI through the AI Broker, powered by IBM WatsonX. We'll walk you through how GenAI can enhance data accuracy, automate processes, and improve decision making, particularly with work order problem code classification. With a real-world example and an in-depth look at the architecture, this presentation is perfect for anyone eager to see how AI can improve their maintenance and operational strategies.



1:00p-2:15p

Integrating Maximo and ArcGIS: Enhancing Data Integrity and Operational Efficiency at APS

Joel Wells - APS

Purpose: Join Arizona Public Service (APS), a leading energy provider, for an insightful session on their integration of IBM Maximo and Esri ArcGIS following a significant asset reclassification initiative. Responsible for delivering reliable electricity to 1.4 million customers, APS faced challenges in maintaining data alignment between their Esri ArcGIS Geographic Information System (GIS) and IBM Maximo Enterprise Asset Management (EAM) system.

Content: To address these issues, APS implemented a robust, productized integration solution that ensures two-way synchronization between the systems. This integration allows APS to create and update asset records from GIS to Maximo while synchronizing the location and asset number back from Maximo to GIS. This ensures both systems reflect the most recent data. This initiative not only resolved longstanding data integrity issues but also positioned APS for future enhancements, including a planned migration to the ArcGIS Utility Network model. Joel will be assisted by Lindsay Sutherland-Gvakharia, Geonexus.

2:15p-2:45p

AFTERNOON BREAK
NETWORKING & LIGHT
REFRESHMENTS PROVIDED

BREAK SPONSOR

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AFTERNOON 2 SESSIONS



2:45p–4:00p

Testing Maximo to Ensure System Integrity: The Reasons, Types, and Processes

Bob Fyke – Con Edison of New York

Purpose: There are many times and reasons to test Maximo and it is important to do it correctly to ensure system integrity. Understanding the testing goals and having a good process, are both keys to success. Con Edison's Maximo activity is extensive & this activity frequently requires some type of testing.

Content: This presentation will define the types of testing, the process we follow, & lessons learned.



2:45p–4:00p

A Reasonable Approach to Operational Success Through Asset Performance Monitoring

Zach White – Cooperative Energy

Purpose: Cooperative Energy recently re-powered a combined cycle station in their Plant Morrow location in Mississippi. This session will share and discuss why a smarter power plant isn't all flashy technology but grounded in refinement of core functions and enhancing them using a solution across Maximo, Historian, data sensors, thermal performance and advanced pattern recognition. Attendees will understand the highlights of best practices to springboard power plants into operational success.

Content: Cooperative Energy repowered their existing coal plant and employed various techniques to engage and utilize existing plant employee expertise throughout construction to increase continuity between coal and combined cycle operation. The plant envisioned increasing O&M awareness of asset conditions by implementing supplementary monitoring technologies and maintenance management practices upon startup. The team worked together to determine overall plant priorities and found a balanced approach to implement smart technologies enabled by a Maximo foundation while mapping objectives to technologies.

The solution included Maximo, Historian, online sensors, thermal performance and advanced pattern recognition, and data aggregation dashboards. The implementation refined core maintenance functions, developed preventive and predictive maintenance strategies, and enhanced it using technologies. The project team also consolidated manuals and asset master data and integrated content management system with Maximo. Zach will be assisted by Paul Von Hertsenberg, 1898 & Co.



2:45p–4:00p

Maximo 101 – Compatible Unit Estimating

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: Arizona Public Service (APS) has over 150,000 T&D CU's and embarked on a complete overhaul of our CU Library. We will dive into the strategy of updating our CU structure and how this directly supports the unitization of our company assets and bottom line. An overview of creating an estimate and tying it directly to a work order will be reviewed. This session covers the foundational elements and concepts around CU's, CUE, and Work Orders in Maximo.

Discussion will include:

- Compatible Unit Library and Standards
- CU structure and hierarchy
- Versions, Stations, and Statuses
- Work Order Design Phase, Approvals, Costs, and Actuals
- CUE alignment and access from the work order
- Accounting alignment, PowerPlan integration, In Progress Estimate, As-Built Estimate, Reconciliation, and Unitization of Assets

AFTERNOON 2 SESSIONS



2:45p-4:00p

Maximo Mobile 9.0 update – Current Personas Supported, Existing Functionalities and Beyond
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: This session will demystify IBM's Maximo Mobile and the latest 9.0 release, cover what is needed to implement and configure Maximo Mobile, including live demos and use case examples from customers on how this mobile tool is being used to drive work execution & inspections in the field.



2:45p-4:00p

Maximo Supply Chain Update
Thomas Knowles – IBM

Purpose: IBM led session which provides the 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.



2:45p-4:00p

Scheduling and Dispatching Dashboard with Maximo Optimizer – What this means within the Maximo Application Suite
Pedro Solfa Spadacini – IBM

Purpose: As part of The User Experience improvements within the Maximo Application Suite, we show how Planning and Scheduling modules have been improved and integrated with Mobile, Spatial and Optimizer to deliver the complete Field Service Manager module for The Maximo Application Suite.

Content: Review The Field Service Manager within Asset Lifecycle Management for strategic deployment within the Maximo Application Suite.



2:45p-4:00p

Transforming Asset Operations with Generative AI
Mitch Simon – IBM

Purpose: Grid Resilience is a key imperative for utility operations. Significant trends in utilities include managing risk of a transitioning workforce, maintaining aging infrastructure, meeting higher demand due to electrification, deploying new grid edge technologies, and synergizing renewable generation. Coupled with these trends is the adoption of new engineering standards, new construction regulations, interconnection policies, and safety procedures. How can utilities keep up? Infusing AI into asset operations workflows has proven beneficial in enhancing utility worker productivity and building a resilient workforce.

Content: This session will explore high value generative AI use cases for asset operations that transform workflows, reducing manual work and increase operational efficiency outcomes. These personae based digital assistants, powered by watsonx, are designed to provide a tailored conversational AI experience for engineers, field workers, safety managers, and construction workers who are responsible for designing, building, operating, and maintaining the grid safely. You will also hear about innovative watsonx use cases, their value propositions and real customer examples of applying generative AI to utility asset operations.

AFTERNOON 2 SESSIONS



2:45p-4:00p

Enhancing Operations with Automation and Spatial Intelligence

Cristiane Souza Moraes Felicio & Thiago Geraldi - IBM

Purpose: Join us for an insightful session on automating and improving enterprise asset management with IBM Maximo. Discover how the integration of process automation and geographic intelligence can greatly improve your operations, delivering efficiency and effectiveness. IBM Maximo harnesses the power of automation to streamline operations, reduce manual effort, increase productivity, and prevent errors. With geographic intelligence, you get a comprehensive spatial view of your assets, allowing you to accurately predict maintenance needs and make well-informed decisions.

Content: This session will explore a practical application and benefits, demonstrating how we can help your organization optimize asset management processes. Learn how to harness the power of technology to effectively anticipate problems before they become problems and improve overall operational performance. If you're new to IBM Maximo and want to deepen your understanding, this session will provide you with valuable insights and strategies to take your asset management to the next level.



2:45p-4:00p

Analyzing Results of RBM Accelerator Implementation for Maximo

Tom Hickey - Proman

Purpose: This presentation details the impact of the RBM Accelerator, focusing on the Asset Criticality Ranking (ACR) component and its benefits for the organization. The RBM Accelerator enabled Proman to compile a structured Master Asset List (MAL) and rank these assets based on their importance to the business using ACR. This ranking facilitated the application of tailored maintenance strategies (ASO) and the identification of critical spare parts through Preventative Maintenance Optimization (PMO). The effectiveness of ASO was continuously evaluated, and root causes of deficiencies were identified using Reliability Analytics.

Content: This presentation will provide an analysis review of the outcomes and advantages of the RBM Accelerator for Maximo end-users, showcasing how it can drive operational efficiency in asset management. The implementation has established a foundation for continuous improvement and sustainable maintenance practices, delivering return on investment (ROI). Tim will be assisted by Russ Mokrouz, ABS Consulting.

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

Scrabble Challenge - Receive letter tiles from each vendor to create a 'Maximo' word (from the list on Guidebook) with the highest point value 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, SEPTEMBER 18

GENERAL SESSIONS

BREAKFAST SPONSOR

7:00a-8:00a

Continental Breakfast

(SPONSOR)

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-8:45a

APS Keynote

Supply Chain Transformation through Technology Solutions

Juli West
APS, VP of
Supply
Chain

8:45a - 9:30a

**Terry
Saunders**
IBM

IBM Presentation

Utility Issues and Challenges – How Do We Successfully Lead and Shape Our Future

With the move to electrification of all transportation and comfort air, the electrical demands of AI, Cloud and hydrogen production, how will we respond. The scarcity and importance of water. How do we manage the transition and blending of hydrogen over natural gas? How do we pave the road to sustainability. The balance and mix of People, Process and Technology. As always, People are our Master Keys to unlock a successful future augmented by Technology, Systems and Processes.

9:30a - 10:15a

Panel Discussion on Asset Creation

Featuring APS & ConEd

**Panel of
Utilities**

**Moderator:
George Perry**

10:15a-10:45a

MORNING BREAK

NETWORKING & LIGHT
REFRESHMENTS PROVIDED

BREAK SPONSOR

(SPONSOR)

CONFERENCE DAY 2

WEDNESDAY, SEPTEMBER 18

MORNING SESSIONS



10:45a-12:00p

Eversource Upgrade to MAS 8

Kevin Rogerson – Eversource Energy

Purpose: Eversource, New England's largest energy delivery company, implemented Maximo to support its Work and Asset Management, Supply Chain and Procurement businesses starting in 2016. The Maximo instance at Eversource is used by over 8K employees and contractors to support over 4.4 million customers across 3 states.

Content: Come hear how preparation, leadership support and a great team were able to overcome challenges to deliver a successful upgrade project.



10:45a-12:00p

Introductions to Inspections in Maximo

Matt Scruggs – Mount Pleasant Waterworks

Purpose: This presentation is designed to give the audience a comprehensive introduction to Maximo inspections and their capabilities, configurations, best practices, and an interactive Q&A session.

Content: Efficient asset management is crucial for a utility's operational success. Maximo Inspections empower organizations to streamline their inspection processes, enhance regulatory compliance, and optimize asset performance. This session serves as a guide to how we at Mount Pleasant Waterworks are utilizing Maximo Inspections. Participants will delve into the fundamentals of inspection management, learn to configure inspection questions, leverage conditional expressions, and generate inspections attached to a work order through job plan based PMs. By the end of this session, attendees will be equipped with the knowledge and practical skills needed to initiate and manage inspections efficiently within their organizations.



10:45a-12:00p

Maximo 101 (Technical) – Maximo Data

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 interactive session will take a high-level look into the Maximo database configuration module, domains and queries. Within database configuration, we will discuss tables and attributes, indexes, relationships and non-persistent fields. Simple and complex domains will also be discussed along with query creation and their ties to start centers.



10:45a-12:00p

Maximo Mobile for Operator Rounds

Srini Garlapati & Sharad Kumar – Calpine

Purpose: Calpine is in the process of adopting Maximo Mobile for Operator Rounds. This is an attempt to shift from a home-grown custom application that has been in use at most of our power plants for over a decade. The need to standardize Operator Rounds, improve supportability and lower overall total cost of ownership were primary drivers for this effort.

Content: This presentation reviews our experience with this effort, including progress so far, issues we face, solutions we developed and areas we see the need for additional support from product teams.

CONFERENCE DAY 2

WEDNESDAY, SEPTEMBER 18

MORNING SESSIONS



10:45a-12:00p

Punchout Catalog Shopping and Automated cXML Order Placement and Invoicing

Jinger Dittmer - Kaiser Aluminum

Purpose: Kaiser Aluminum, a leading producer of semi-fabricated aluminum products, has been using Maximo at 12 sites in North America for many years. They also used Oracle EBS at one large site, and at that site they implemented Punchout Catalog Shopping with Automated Order Placement and Invoicing. The many benefits of such a solution applies not only to the Supply Chain Team, but also to the Maintenance and Production Teams, and the Accounts Payable function. The value of Punchout functionality led Kaiser to deploy a similar solution with Maximo. They wanted to level the field between Oracle and Maximo Application suites!

Content: Attend this session and learn about the Procure to Pay (P2) integration and automation process and solution they implemented recently using the P2Insight e-commerce framework for Maximo, and about the deployment process. The end users can now punchout and shop for parts with many leading Industrial suppliers, including Amazon, Grainger, McMaster-Carr, Applied Industrial, Fastenal, and MSC. The Supply Chain professionals have less administrative tasks to do, and can focus on more strategic initiatives. The entire organization is more productive, efficient, and reliable!



10:45a-12:00p

Maximo Vegetation Management

Thomas Knowles & Dan Mishra - IBM

Purpose: An update on how IBM is innovating and strengthening ALM strategy with Maximo Vegetation Management. This will include an overview and demonstration of current capabilities, details on planned new features and opportunity to provide feedback.

Content: IBM led session which provides the user community with a Maximo product update and roadmap regarding new features for Vegetation Management. See how IBM is leveraging Gieger-Mode LiDAR, GIS and Analytics to produce vegetation based KPI that provide better visibility to Maximo work operations, drives more efficient work execution and helps avoid outages and disruptive events.



10:45a-12:00p

Create and Customizing Map Items in Maximo Spatial for Mobile and Desktop

Thiago Geraldi & Thiago Iunes - IBM

Purpose: Maximo Spatial offers robust capabilities for configuring and customizing map items to enhance asset management efficiency. This hands-on session is designed to familiarize participants with the customization options available within the Maximo environment. Attendees will explore key features such as map layer configurations, symbology adjustments, and integration of spatial data sources

Content: The session will guide attendees through the process, starting from configuring maps in the Map Manager, including the creation of VTPKs (Vector Tile Package) and replicas for offline functionality on mobile devices. Participants will also learn to customize map events such as long press and right-click actions. For example, demonstrating how to initiate the creation of a work order using the X, and Y coordinates clicked by the user on the map. This session will showcase these capabilities through live demonstrations, illustrating how to adapt these features to meet specific organizational needs. By the end of the session, we aim for participants to understand the possibilities of configuration and customization in Maximo Spatial, empowering them to optimize asset management workflows through enhanced spatial visualization and analysis.

CONFERENCE DAY 2

WEDNESDAY, SEPTEMBER 18

MORNING SESSIONS



10:45a-12:00p

Modernization of Integration Platform: Enhancing Agility, Security & Performance
Venu Raavi – APS

Purpose: Modernization of Integration Platform: Enhancing agility, security & performance. The target audience for this session is IT resources.

Content: Discussion will include:

- Overview of scope and role of APIC platform
- Certificate Management, Service Accounts, etc.
- Lessons Learned over the course of SCORE Program implementation



10:45a-12:00p

Thirsty for Pasbt? (Not the Drink)
Steven Kaplan – WEC Energy

Purpose: Often times Microsoft Access database seems to be the easy and quick way to create an avenue for users to enter and store data. Ultimately from experience, this usually leads down to more headache than benefits. Given the flexibility and customizable nature of Maximo, we decided to bring the information over to Maximo and create a custom application, PASBT (Partial As-built Tracker). The application is utilized by As-builders to track progress of Gas Mains through its lifecycle. Although a smaller project in scope, like for like is always not the case. From first time creating a custom app, various business users groups, to navigating ambiguous terminology, we detail out our PABST application, experience, challenges, and wins as we convert from Access database over to our custom Maximo app.

Content: From first time creating a custom app, various business users groups, to navigating ambiguous terminology, we detail out our PABST application, experience, challenges, and wins as we convert from Access database over to our custom Maximo app.

12:00p-1:00p

LUNCH

A plated lunch to promote discussion among attendees.

LUNCH SPONSOR

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CONFERENCE DAY 2

WEDNESDAY, SEPTEMBER 18

AFTERNOON 1 SESSIONS



1:00p-2:15p

Maximo Monitor, Health & Predict
Carlos Ferreira - IBM

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

Content: This session will present the Asset Performance Management practices being applied using the latest version of Maximo Health and Maximo Predict applications. It will include a demonstration for a utility that is monitoring current and future asset health conditions and predicting 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 Monitoring and Automated and Intelligent Condition Based Maintenance; 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

The Bureau of Reclamation's Transformative Maximo Journey
Reuben Vidaurrazaga - USBR

Purpose: In previous MUWG presentations, Reclamation speakers focused on the development of our Maximo strategy and how we employed that strategy to develop a re-implementation plan for our current 26-site, 1300-user Maximo system. The project kicked off in February 2024 and we are well underway with transforming our Maximo hierarchies, business processes, etc. to align with overarching business drivers that span the needs of organization rather than the "independent" sites and facilities that currently leverage the system. Hear about where we're at in our journey, what's to come, and additional considerations and challenges we've faced along the way.

Content: In this presentation, we'll delve into Reclamation's transformative journey as it advances into the 21st century with the re-implementation of Maximo across its sites and facilities and the migration to MAS 8 within its Capital Asset and Resource Management Application (CARMA) 2.0 project initiative. Through an overview of the CARMA 2.0 project, we will highlight on the project's anticipated goals and milestones, current progress, and the future-state of enterprise asset management with MAS8 (or MAS9) at Reclamation. From streamlining operations and maintenance to enhancing data integration and analytics capabilities, CARMA 2.0 aims to propel Reclamation towards greater efficiency and effectiveness in all aspects of asset management. Join us on this transformative journey as Reclamation redefines its approach to enterprise asset management into the 21st century.



1:00p-2:15p

Maximo 101 - Preventive Maintenance
Clay Cook - MUWG

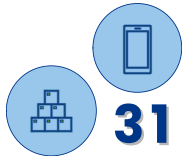
Purpose: The Maximo 101 Track of presentations is designed for those attendees who are evaluating Maximo and Maximo applications, new to Maximo, or have very little experience with Maximo. These sessions are designed to offer high-level information on Maximo capability, uses for various Maximo modules, 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 Preventative Maintenance module concentrating specifically on their development and usage. Discussion will include how the Preventative Maintenance module is organized and setting up a PM, fields (including dates) on the PM and what information is needed to properly build PM's to provide value to the organization. Further discussion will include how PM's are tied to other Maximo modules to provide the necessary information to make educated business decisions for improved organizational success

CONFERENCE DAY 2

WEDNESDAY, SEPTEMBER 18

AFTERNOON 1 SESSIONS



1:00p-2:15p

Streamlining Inventory Management with Maximo Mobile: Empowering Storeroom Clerks for Effortless Operations

Kimi Jasuja - IBM

Purpose: The purpose of the presentation is to showcase the Inventory capabilities offered by Maximo Mobile targeted for Storeroom Clerks persona. During the presentation, attendees will gain insights into both the inventory capabilities and the latest updates in Maximo Mobile 9.0 related to inventory functions.

Content: During presentation we will discuss Maximo Mobile functionality tailored for storeroom clerks persona, enabling seamless inventory issue, transfers, receiving and efficient item picking/staging processes. Focus will be on latest Maximo Mobile 9.0's capabilities, designed to empower storeroom clerks with unparalleled ease and productivity in managing inventory operations. Maximo Mobile empowers storeroom clerks with a comprehensive suite of features and functionalities, designed to streamline inventory management operations and drive efficiency throughout the organization.



1:00p-2:15p

APS Training

Tom Press - APS

Purpose: TBD

Content: TBD



1:00p-2:15p

Amplifying Asset Management Resilience with Climate Hazard Risks and Weather Insights

Roshni Thawani - IBM

Purpose: Provide utility professionals with a unique opportunity to learn about IBM's Asset Life Cycle Management (ALM) expansion including Climate Hazard Risk & Weather Insights. The presentation covers how current Maximo capabilities (Health, Scheduler, Optimizer, & Condition Monitoring) are augmented by Climate Hazard Risks and Weather Insights. An Early preview to new designs enables opportunities for feedback and iteration tailored to client needs.

Content: This MUWG session will engage participants on the multifaceted impacts of climate change to uncover a deeper understanding of climate risk complexities and its impact on E&U asset management. In addition to climate-related risks, there is an opportunity to highlight how weather impacts asset management operations today. Storms often result in emergent work orders that disrupt operational plans. By utilizing weather data, IBM aims to optimize work queues, boost efficiency, and aid in preventing, mitigating, and preparing for potential near-term catastrophic events. Experience how integrating environmental insights into Maximo can enable organizations to enhance their overall asset lifecycle management and investment planning processes.

CONFERENCE DAY 2

WEDNESDAY, SEPTEMBER 18

AFTERNOON 1 SESSIONS



1:00p-2:15p

Maximo Application Suite and Esri ArcGIS: Unveiling IBM's Powerful New Bundled Offering

Rafael Teixeira, Thiago Geraldi & João Souto Maior, IBM

Purpose: Join us for an in-depth, hands-on session that will guide you through the deployment of Esri ArcGIS within the same OpenShift cluster as Maximo Application Suite (MAS) to achieve maximum performance. Learn best practices for integrating Esri ArcGIS with MAS using App Points, ensuring optimal resource utilization and seamless functionality.

Content: This session will focus on practical steps and configurations that enhance performance and simplify the deployment and management of your instance. Additionally, benefit from robust support and expert guidance from IBM throughout the entire process. Discover how to leverage a high-performance Esri ArcGIS deployment within MAS and OpenShift, and unlock the full potential of your infrastructure.



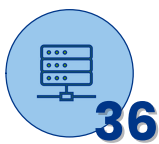
1:00p-2:15p

MAS: Evergy's Journey towards Maximo Application Suite

Cassandra Coad - Evergy

Purpose: Evergy's goal is to move to a consolidated work management platform for the Transmission, Substation and Distribution business areas. Maximo will be the system of record for work management allowing the business to take advantage of newer and cutting-edge technology. This presentation will show the evolution of our journey utilizing the newest version of MAS and RH Openshift.

Content: This presentation will show the evolution of our journey utilizing the newest version of MAS and RH Openshift.



1:00p-2:15p

Maximo Application Suite – Basic Administration with AppPoint Explain

Derek Fu - IBM

Purpose: The Maximo Application Suite (MAS) introduces an enhanced administration interface designed to streamline the management of applications, users, user access, licenses, and AppPoints usage.

Content: This presentation outlines an in-depth exploration of MAS administration capabilities. Attendees will witness live demonstrations showcasing various activities and configurations within MAS administration features.

2:15p-2:45p

AFTERNOON BREAK
NETWORKING & LIGHT
REFRESHMENTS PROVIDED

BREAK SPONSOR

(SPONSOR)

CONFERENCE DAY 2

WEDNESDAY, SEPTEMBER 18

AFTERNOON 2 SESSIONS



2:45p–4:00p

Maximo Reliability Strategies and the Reliability Strategy Library – What Is It, Why Is It Valuable, and What Makes It Different
Derek Valine – IBM

Purpose: This interactive session will focus on Reliability Strategies features available in 8.11 and 9.0 as well as providing an understanding of RSL content so that users can quickly leverage the Reliability Strategies application to optimize equipment reliability and increase availability.

Content: Learn how Reliability Strategies will:

- Streamline equipment strategy development and optimization
- Inform when monitoring may replace or reduce time-based maintenance requirements
- Integrate generative AI into reliability processes



2:45p–4:00p

Integrating Supply Chain Material Management in Maximo Work Order Tracking at APS
Scott Jones – APS

Purpose: This discussion will focus on transitioning to Maximo to manage materials and provide insight into lessons learned and best practices. Arizona Public Service (APS) recently made a change and included material management within Maximo. Prior to this change, material was managed using an external homegrown software. Material was pushed from Maximo once a compatible unit estimate was accepted; users would then use the external application to manage material. This overview will discuss the lessons learned during implementation and updates made to allow T&D to manage materials and assist Supply Chain in procurement and delivery.

Content: Discussion will include:

- Prior material management process outside of Maximo
- First iteration of material management using Maximo including:
 - Management in pre-approval and post-approval statuses
 - Enhancement of user visibility by creating an additional tab in Work Order Tracking (Supply Chain)
- Changes made in Work Order Tracking to material management to improve user functionality and control of material including material management in pre-approval and post-approval statuses



2:45p–4:00p

Adopting MAS – EAM to MAS Best Practices
Jean Carlos Ribeiro Goncalves – IBM

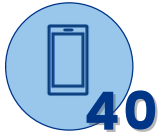
Purpose: Want to watch and learn about the EAM to MAS Upgrade process, tips on how to start the journey to MAS, tips about Manage deployments and more, coming directly from nothing more, nothing less than the person who performed more tests of EAM to EAM and EAM to MAS Upgrades in the entire IBM Development Team for the last 16 years?

Content: Through this presentation I share tips and the successful path of learning I followed myself, and which companies and professionals can follow, to establish the foundation needed to learn how to upgrade, deploy and maintain MAS and Manage instances.

CONFERENCE DAY 2

WEDNESDAY, SEPTEMBER 18

AFTERNOON 2 SESSIONS



2:45p-4:00p

Effective Hands-on and Onboarding for Maximo Spatial: Empowering Mobile Workforces

Thiago Geraldi & João Souto Maior, IBM

Purpose: In this session, we will share best practices for integrating Maximo Spatial within organizations, focusing on supporting Maximo mobile offline. As mobile technology becomes essential for asset management, it's crucial to equip teams with the skills to effectively use Maximo Spatial's GIS features.

Content: Participants will learn how to configure maps, create and use offline resources, and utilize mobile functionalities. This ensures field workers can operate smoothly even without constant Internet access. Join us to discover how to use and optimize Maximo Spatial for your mobile workforce.



2:45p-4:00p

Maximo 101 – Storerooms, Inventory Usage & Receiving

Destinie Richter – Oncor

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 Storerooms, Inventory Usage and Receiving modules. Discussion will include how the modules are organized, fields on the records and what information is needed to properly to provide value to the organization.



2:45p-4:00p

Enhancing Safe Work Management Processes with a Digital Permitting and Safety Solution

Jason Conley – Apex Clean Energy

Purpose: Apex Clean Energy recognized a need for a configurable digital permitting and safety solution when they identified that their manual safe work processes would not enable them to easily scale their processes. This led them to discover Prometheus ePAS (Electronic Permit Administration System) which would be able to integrate directly with IBM Maximo to maintain one source of truth. With the solution, Apex Clean Energy has been able to configure workflows for processes like incident reporting, safety observations, management of change (MOC), ROCC e-Log, and more. With these changes, they sought to achieve well-documented process maps of event tracking, a clear map of process interactions and integrations into their day-to-day business, and a simplified system for inputting and extracting data.

Content: In this session, we will cover Apex Clean Energy's safe work processes before ePAS, how ePAS enhances their safety workflows and processes, & the results they have achieved with the ePAS solution.

CONFERENCE DAY 2

WEDNESDAY, SEPTEMBER 18

AFTERNOON 2 SESSIONS



2:45p-4:00p

Creating a Digital Twin at Con Edison

Shaun Ramkishun - Con Edison

Purpose: Safety of the workforce and planning work to identify barriers is a prime role in the Con Edison asset management process with Maximo. This has led the team to investigate a digital twin option to better align their work execution management in a way that innovates and extends the process to real world applications. A digital twin's impact allows for training of the workforce on the hazards and needs to a project or maintenance completion with safety at the forefront.

Content: This session will showcase how Con Edison has incorporated a strategy to integrate this digital twin technology into their MAS deployment to allow for this element of safe operations into their current processes. With this powerful integrations, safety, planning, and work execution will be streamlined and focus on operational excellence in operating orders. It also allows for IoT integrations to become visible in the digital twins for an enhanced profile of the assets to maintain better decision making. Shaun will be assisted by Michael Guns, JFC & Associates



2:45p-4:00p

MAS Maximo Visual Inspection Hands-on Lab - Learn How to Create and Deploy AI Vision Models

Ed Neubecker - IBM

Purpose: Learn how to utilize Maximo Visual Inspection to help automate visual inspections with images of your assets from various camera sources.

Content: Maximo Visual Inspection allows subject matter experts to easily create AI vision models and deploy them for edge inferences and inspections. This hands-on experience will teach attendees how to utilize walk through the process of ingesting images, labeling and training a dataset, then conducting an inference on an edge device. Attendees must come with a laptop that can connect to the internet and Maximo Visual Inspection Mobile installed on an iOS device. This lab will have a few iOS devices available for those that don't have an iOS device.



2:45p-4:00p

Title

Presenter , Company

Purpose: Description

Content: Description

CLOSING SESSION & REMARKS

4:00p-4:30p

Please use Guidebook App to provide session feedback and to complete the 'Overall Conference Evaluation'. Then, make your way the closing session. Must be present to win door prize!

CONFERENCE DAY 3

THURSDAY, SEPTEMBER 19

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

THANK YOU!



MUWG
MAXIMO UTILITY WORKING GROUP

revised:
Aug 2024