MUWG SPRING CONFERENCE
CHARLOTTE, NC
APRIL 7-10

2026

MAXIMO USER CHOICE AWARD WINNER 2025
BEST MAXIMO USER GROUP

HOSTED BY:

DUKE ENERGY®

MAXIMO IN MOTION: ENERGIZING SMART SYSTEMS THROUGH AI, PEOPLE & PROCESSES

MUWG
MAXIMO UTILITY WORKING GROUP

GREETINGS FROM MUWG!

Welcome to Charlotte! The MUWG Management Committee is thrilled to invite you to our upcoming conference in the charming city of Charlotte, North Carolina, hosted by Duke Energy. This conference's theme, "**Maximo in Motion: Energizing Smart Systems through AI, People & Processes**," reflects our industry's forward momentum in harnessing technology, collaboration, and continuous improvement to build smarter, more resilient operations.

We're excited to bring together a community of Maximo practitioners, leaders, innovators, and first-time attendees for a conference designed to educate, connect, and inspire. You can expect:

- **Engaging keynotes** that explore the real impact of AI and intelligent systems
- **Real-world case studies** from organizations pushing boundaries with Maximo
- **Interactive learning sessions** and technical deep dives for all experience levels
- **Outstanding networking opportunities** with peers and industry experts

New This Conference! Enhanced Training Sessions - Based directly on feedback from past attendees and MUWG's commitment to continuously raising the bar, Friday's training sessions have been revamped to deliver even more actionable, hands-on value that will allow you to leave with skills you can put to work immediately. (Check out page 16 for more information.)

MUWG continues to be the trusted forum for Maximo users across utilities and beyond. Each conference is your opportunity to exchange ideas, discover solutions, and strengthen the community that makes MUWG exceptional. We encourage you to participate fully by asking questions, sharing your Maximo journey, and consider presenting at a future event. Your insights are what keep MUWG moving forward.

A sincere thank you to our sponsors, IBM, MUWG Board of Directors, MUWG Administration, and especially the MUWG Management Committee. Your dedicated support makes this event possible. So, pack your bags, bring your curiosity, and get ready to energize your Maximo journey. See you soon!

- Janie Mann, MUWG Management Committee Chair

MUWG - Best Maximo User Group

The **MAXIMO USER CHOICE AWARDS**, hosted by Maven Asset Management, is a fully community-driven celebration of innovation and excellence. Winners were chosen by the Maximo community, ensuring authentic recognition of outstanding achievements.

BEST MAXIMO USER GROUP acknowledges that MUWG has fostered collaboration, shared insights, and supported the Maximo community with exceptional events and initiatives that have enriched the Maximo community.

MUWG is distinguished by its support, engagement & the value it provides for its members. Thank you, our members, for voting for us and being part of the community.

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TUESDAY, APRIL 7
PRE-CONFERENCE ACTIVITIES

IBM Maximo Location Based Service Development Partner Meeting
9:00a-11:00a | Registration Required - email Thiago Geraldi - tgeraldi@ibm.com

Preconference Networking Event - A Taste of Charlotte
11a-2:30p | Meet in Sheraton Lobby at 10:45a for chartered transportation to event.

$80 per person & registration required

Kick off your conference experience in style with lunch at NoDa Brewing Co., followed by a laugh-packed ride on the Funny Bus Charlotte! Recently voted "Best Tour of Charlotte," this award-winning, nationally recognized comedy tour is where history, humor, and hometown charm meet for an experience you won't want to miss. Enjoy a local beverage, great company, and a one-of-a-kind comedy tour that blends networking, local flavor, and pure fun.

Limited to 80 attendees - reserve your spot today!

Event Sponsor: STARBOARD CONSULTING

MaxTECH IT User Group Meeting
2:30p-4:30p

- Registration Required. Click here to RSVP.

MUWG First Timers Orientation
4:30p-5:00p

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

Using Guidebook - MUWG 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 Charlotte!** Check in for the Conference to receive badge and welcome gift. Then, join us for cocktails, lite bites & live music.

Hospitality Night Sponsored by: Naviam

Music Sponsor: POLARIS SOLUTIONS

DOWNLOAD THE GUIDEBOOK APP

- **Locations of Sessions**
- Build your Conference Schedule
- **Connect with Attendees & Exhibitors/Vendors**
- Access Agenda & Presentations
- **Complete Overall Conference Evaluation**
- Add to Photo Album

7:00a-8:00a **CONTINENTAL BREAKFAST**

8:00a-8:30a **Opening Remarks**
Janie Mann, MUWG Management Committee Chair

8:30a-9:00a **Duke Energy Keynote Presentation**
Richard Donaldson, SVP & Chief Information Officer

Richard Donaldson, SVP & Chief Information Officer at Duke Energy, shares how the company is innovating and leveraging cutting-edge technology to build a smarter energy future. Drawing on real-world experience leading technology at scale, he'll discuss how utilities can modernize critical platforms, strengthen data, and apply AI with purpose—driving operational value while maintaining reliability and trust.

9:00a-9:30a **Duke's Grassroots Success in In-House Maximo Upgrade Deployment**
Aaron Crary - Duke Energy

This panel discussion brings together the managers who played a pivotal role in championing and supporting the deployment of an in-house Maximo upgrade from 7.6 to MAS 9.0, utilizing a grassroots approach. Panelists will share first-hand insights into how empowering front-line teams and leveraging existing organizational knowledge led to a more adaptive, resilient, and cost-effective upgrade process.

9:30a-10:00a **IBM Maximo App Suite - Product Update & Roadmap Overview**
Stan Smith - IBM Program Director, Maximo Product Management

Maximo Application Suite is the leading asset lifecycle management product in the market. This summary session will articulate recent and upcoming investments across EAM, FSM, APM, AIP, HSE, Supply Chain and how we are leveraging Generative AI to improve the experience. This session will be covered in detail in the afternoon breakout session with time there for Q&A.

10:00a-10:45a **MORNING BREAK - refreshments provided**

Sponsored By: Net Results Group — Empowering MRO Excellence

10:45a-12:00p **Kick-Off Sessions**

Day 1 'kickoff sessions' are an opportunity to meet and network with other attendees that are interested in similar topics and session categories. These sessions typically include introductions, conversation on session category topics and facilitated discussion by MUWG Committee Members. Participation is encouraged!

Spring 2026 kickoff sessions include: AI, IT, Mobility, Power Generation, Supply Chain, Telecom, Transmission & Distribution and Water/Wastewater & Pipelines.

AI - Artificial Intelligence | Information Technology | Mobility | Power Generation | Supply Chain | Telecom | Transmission & Distribution | Water / Wastewater & Pipelines | Maximo 101 *(No Kick-Off Session)*

Look for these icons throughout the agenda, each one highlighting the primary focus of a session.

12:00p-1:00p **LUNCH - A plated lunch to promote discussion among attendees.**

Sponsored By: TRINMAX™

DAY 1 - WEDNESDAY, APRIL 8
AFTERNOON 1ST BREAKOUT SESSIONS 1:00-2:15

IBM DEMO ROOM

Maximo Manage Supply Chain | Maximo Mobile - Inventory Applications
The demo room provides an open forum for your questions with answers from IBM Experts. There are no scheduled presentations, but please bring your questions.

1

IBM Maximo Application Suite – Product Update & Roadmap Deep Dive
Stan Smith & selected IBM 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 aggressively expanded capabilities while addressing time to value. This session will talk about recent updates and our plans going forward for all aspects of asset lifecycle and performance management including manage/EAM, mobility, scheduling and dispatching, Generative AI, asset health, vegetation management, renewables and other critical asset classes, industry driven functionality, facility management, and modernized user experiences.

2

MAS 9 Upgrade (Lift & Shift) - Environment Considerations
Michael Daka, Wayne Freeman & Trevor Pratt - Duke Energy

Purpose: This session provides an overview of Duke's lift-and-shift upgrade from Maximo 7.6 on WebSphere to MAS 9 on OpenShift, with a focus on environment planning and execution. The purpose is to share practical insights, planning considerations, and lessons learned to help organizations successfully prepare for and execute a similar transition while minimizing risk and downtime.

Content: This presentation will walk through Duke's MAS 9 lift-and-shift approach, emphasizing environment planning and installation. Topics include capacity planning to support multiple sandboxes and lower environments, development of a comprehensive migration timeline covering all environments and integrations, and coordination of IBM and Red Hat setup sessions. The session will also discuss dynamic deployment techniques for Java and TRM that reduce or eliminate full system outages. Key lessons learned from the project will be shared to help attendees anticipate challenges and apply best practices to their own MAS upgrade initiatives.

3

Putting Maximo in Motion on the Map: Field Operations at City of Fort Worth Water
Christi Eades - City of Fort Worth

Purpose: The City of Fort Worth Water Field Operations group reshaped how they plan and execute work by putting Maximo in motion on the map. Utility and IT leaders will show how supervisors and crews have a spatial view of Maximo work, routes, and assets, and how they made it part of everyday operations. The utility now visualizes investigations and work orders by region, builds and maintains Maximo Routes directly in MapEngine, assigns assets to routes, and quickly sees route/asset relationships. GIS layers (assets, locations, addresses, vehicle locations) support smarter assignment and routing decisions, while GeoNexus Integration Platform keeps Maximo and GIS data aligned.

Content: Presenters will also highlight change management insights: engaging field supervisors early, setting data quality expectations, and IT, GIS, and Maximo Admin coordination. They'll share lessons learned, giving attendees practical ideas they can adapt in their own organizations. Presenters will also highlight change management insights: engaging field supervisors early, setting data quality expectations, and IT, GIS, and Maximo Admin coordination. They'll share lessons learned, giving attendees practical ideas they can adapt in their own organizations. Christi will be assisted by Andy Stewart, Naviam.

4

Optimizing Map Data for Offline Use in Maximo Mobile
Thiago Geraldi & Thiago Iunes - IBM

Purpose: Maximize the capabilities of Maximo Mobile and Spatial—even without network connectivity. This session provides a practical session for preparing map data for offline use, including creating offline map areas, generating VTPK packages, and managing replicas.

Content: Learn how to prepare all essential data so your team can work seamlessly with and without a network connection.

5 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). Sneak peek and review of new supply chain features planned for our upcoming releases. Help validate strategic direction and ensure our roadmap is bringing the right set of new supply chain features to market.

Content: The shared content will be a combination of presentation, concept mockups and live demonstration.

6 Material Packaging Benefits Supply Chain and Crews
Charlene Baker & Jared Cannon - Duke Energy

Purpose: To demonstrate how Duke Energy Supply Chain improved service level agreements by implementing a standardized material packaging framework and mobile app functionality that streamline material staging, ownership transition, and crew pickup processes.

Content: This presentation explains the Material Packaging process and supporting mobile application designed for Supply Chain Operations. It covers how planned materials are received, issued, staged, and returned using designated staging locations, how ownership is communicated and transitioned to Business Unit partners, and how crews efficiently collect their assigned materials. Real-world benefits to supply chain efficiency, service reliability, and field crew productivity are highlighted.

7 Maximo 101: What is a Location?
Wayde Prejean - Kinder Morgan

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. This interactive session will take a high-level look into the Maximo Locations application. 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.

8 Tailored to fit: MAF Application configuration
Claudia Regina Girani Tejos & Jordan Smith - IBM

Purpose: The modern dashboard and mobile applications in the suite need to be configurable to your needs and easily upgraded.

Content: This session demonstrates how to configure out-of-the-box apps – with declarative code – to meet those specific needs. We'll cover the key benefits of configuration, show a live demonstration of the configuration process, and provide an overview of upcoming enhancements planned for Maximo Application Suite (MAS) 9.2 and beyond.

9 Transforming Renewable Operations with AI powered IBM Maximo Renewables
Kimi Jasuja - IBM

Purpose: This session offers a walkthrough of the newest capabilities in IBM Maximo Renewables, demonstrating how Solar, Wind, and Battery Energy Storage operators can enhance reliability, improve production, and streamline maintenance through data-driven insights. With deep integration into the Maximo Application Suite, Maximo Renewables brings asset data, analytics, and execution together in a single workflow to support the full renewable asset lifecycle.

Content: A live walkthrough of the latest capabilities in IBM Maximo Renewables, showcasing how Solar, Wind, and BESS operators can use AI-driven analytics, integrated workflows, and unified asset data to improve reliability, boost production, and streamline maintenance across the full renewable asset lifecycle.

2:15p-2:45p **AFTERNOON BREAK - refreshments provided**

IBM DEMO ROOM

Maximo Scheduler
The demo room provides an open forum for your questions with answers from IBM Experts. There are no scheduled presentations, but please bring your questions.

10

Field Service Management in Maximo Application Suite
Claudia Regina Girani Tejos, Alexandre Quinteiro & Pedro Solfa Spadacini - IBM

Purpose: As part of our ongoing commitment to enhancing the User Experience within the Maximo Application Suite (MAS), this session highlights how Maximo delivers a comprehensive Field Service Management (FSM) solution. We'll explore how the seamless integration of Manage, Scheduler, Mobile, Spatial, and Optimizer components addresses the full spectrum of FSM requirements—empowering organizations to achieve efficient, connected, and optimized field operations.

Content: This session provides a strategic overview of how Field Service Management fits into the broader Asset Lifecycle Management framework within MAS. Through real-world examples and proven deployment strategies, we'll demonstrate how Maximo's modular capabilities enable organizations to plan, schedule, execute, and optimize field service work from start to finish—delivering greater agility, productivity, and operational excellence.We will discuss current and upcoming capabilities.

11

MAS 9 Upgrade: Testing, Technical Validation
John Moore, Michelle Lorden & Jonathan Phipps - Duke Energy

Purpose: Duke will demonstrate how comprehensive testing and technical validation were used to ensure a successful MAS 9 upgrade. Attendees will learn how structured testing strategies, early issue identification, and cross-team collaboration can reduce risk, improve system stability, and validate performance and scalability in a MAS 9 environment.

Content: This session will outline the testing and technical validation approach used during a MAS 9 upgrade. Topics include conducting in-depth technical analysis, addressing compatibility and performance issues through Java, TRM, and interface updates, and executing developer testing using tools such as Splunk, OSLC, and manual user interface comparisons. The presentation will also cover automated testing, manual regression testing, user acceptance testing, integration testing with external business teams, and load testing to validate scalability and reliability. Key lessons learned will be shared to help attendees refine their own MAS 9 testing strategies.

12

From Detection to Resolution: Automating Events with Maximo Visual Inspection, Maximo Spatial and Workflows
Thiago Iunes, Claudio Guerreiro & Thiago Geraldi - IBM

Purpose: In this session, we present how different Maximo products, such as Maximo Spatial, Maximo Civil Infrastructure, and Maximo Visual Inspection (MVI), work together to turn automatic detection into real operational actions.

Content: We will focus on how MVI's embedded cameras and AI models identify anomalies in the field, such as damage to lighting, traffic lights, transformers, etc., and how these events are automatically georeferenced, correlated with assets through Maximo Spatial, and converted into intelligent work orders in Maximo. A complete journey from Detection to Resolution, improving operational efficiency and enabling faster and more accurate location-based decisions.

13

City of Fort Collins: Implementing and Leveraging Maximo Mobile
Mikael Birach - City of Fort Collins

Purpose: This session will cover how Fort Collins configured Maximo and Maximo Mobile for work management, inspections and asset data collection, including decisions around application design, environments, integrations and security.

Content: We will demonstrate how Maximo Mobile is used for daily tasks such as creating and updating work orders, capturing labor and material usage, recording asset condition and attaching photos and documents in the field, and how this has improved efficiency, data quality and user adoption compared to prior tools. Mike will be assisted by ABS Consulting.

14

Returning to Out Of The Box Applications to Plan and Execute Standard Services
Ashely Pickerill & Stephen Whistler - LS Power

Purpose: When LS Power began using Maximo, the attempt was to manage scheduled services through Job Plans, PMs, and Services Contracts for payment. LS Power has struggled with the way Purchase Requisitions were being, or not being, created for payment of outside services. Contract renewals were also problematic because of how the contracts were initially set in Maximo.

Content: With in-depth training, redefining some Preventive Maintenance tasks, re-developing Service Items, and building the actual contract type that was needed, those issues were corrected using out of the box applications and processes. Updating Job Plans and PM's with correct service items and frequencies allowed LS Power to more efficiently process outside services payments, manage contracts, and make the contract renewal process maintainable all while also tracking Preventive Maintenance tasks easily.

DAY 1 - WEDNESDAY, APRIL 8
AFTERNOON 2ND BREAKOUT SESSIONS 2:45-4:00

15 Embracing the Tech: Lessons from Allete's MAS on-premise Upgrade
Bob Anderson - ALLETE

Purpose: Join Allete as they share their experience with staying in an on-premise environment in upgrading from Maximo 7.6 to MAS 9.1 with a candid look at the technical challenges of RHOS learning, in addition to MAS Administration and Maintenance. Attendees will also gain an understanding of how Allete utilized MAS feature channels to maximize version support while balancing project risk, timing and costs.

Content: This session is designed to help organizations planning or currently navigating their own MAS upgrade by providing practical insight into project planning, team alignment, data preparation, and change management.
Whether you're early in your MAS journey or well into implementation, this session will equip you with takeaways on how to align stakeholders, set realistic expectations, and avoid common pitfalls. Discover how Allete is leveraging MAS to support their reliability goals, improve asset visibility, and prepare for the future of intelligent assets.

16 Maximo 101: Compatible Unit Estimating
Tom Press - APS

The 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. This interactive session will take a look into Maximo Compatible Unit Estimating. 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, InProgress Estimate, As-Built Estimate, Reconciliation, & Unitization of Assets.

17 Streamlining User Administration in Maximo Manage with SCIM
Scott Wallace - IBM

Purpose: Enterprise identity governance often requires seamless interoperability between heterogeneous systems. SCIM (System for Cross-domain Identity Management) provides a REST-based protocol and standardized schema for automating user provisioning, deprovisioning, and attribute synchronization across platforms. This session introduces SCIM (System for Cross-domain Identity Management) integration with Maximo Application Suite.

Content: We'll explore why SCIM is a best practice for modern identity management and demonstrate how to integrate it with Maximo Manage). Using real-world examples from Microsoft Entra and Okta, attendees will gain practical insights into configuration, deployment, and troubleshooting. Key takeaways: - Understand SCIM and its role in secure, scalable identity management with MAS - Learn step-by-step configuration of MAS Manage with SCIM - Discover proven tips and best practices for successful implementation

18 Driving Reliability Excellence with AI-Powered Reliability Strategies and APM in Maximo 9.2
Derek Valine - IBM

Purpose: Learn about new features and AI capabilities planned for the Maximo Application Suite (MAS) Reliability Strategies and APM applications in release 9.2. Discover how these capabilities streamline planning, enable condition-based and risk-informed approaches, and reduce O&M costs while improving reliability and compliance.

Content: This session will showcase the upcoming enhancements to Reliability Strategies in the Maximo 9.2 release, featuring expanded AI-driven capabilities for strategy development, automated generation of PMs and Job Plans, and deeper integration across the Maximo Application Suite (MAS). Attendees will discover how these innovations streamline planning, enforce standardized maintenance practices, and accelerate strategy deployment. Learn how, in combination with MAS Asset Performance Management (APM) applications, these features enable organizations to transition from traditional time-based maintenance toward condition-based and risk-informed approaches. The result is a more adaptive, data-driven reliability framework that reduces O&M costs, improves asset performance, and strengthens compliance in regulated environments.

VENDOR NIGHT
ENGAGE & EARN!
WED. 4/8 5:00-8:30P

Have fun and meet over 35 Maximo product and service Vendors during VENDOR NIGHT! Enjoy an open bar & full buffet. Participate in the 'Engage & Earn' game by visiting each vendor to earn a scratch off ticket for a chance at a prize. Then, remember to place your vote for the Best Vendor Swag Award.
Details & rules can be found in Guidebook under the 'Link' tab.

7:00a-8:00a	**CONTINENTAL BREAKFAST**
8:00a-8:30a	**Opening Remarks** Janie Mann, MUWG Management Committee Chair
8:30a-9:00a	**Duke Energy Keynote Presentation** Julie Turner, SVP Grid Services The critical role of a strong governance and services organization in achieving process and technology objectives
9:00a-9:30a	**Duke Energy, AI and MAS9, Where Can the Future Take Us** Sai Kanna, Sr. IT Manager Discussion around AI and how Duke Energy plans to integrate AI and MAS9.
9:30a-10:00a	**AI HAS A LOT TO OFFER BUT… Achieving Reliability takes Commitment and Hard Work; Are you willing to commit and do the Work?** Terry Saunders - IBM Most of us believe AI will have a lot to offer in improving Asset Management and deliver improved performance, reduced cost and managed risk. This presentation will outline the important fundamental activities we need to achieve for AI to deliver optimum results to our utility business.
10:00a-10:45a	**MORNING BREAK - refreshments provided** *Sponsored By:* Max Content Solutions

IBM DEMO ROOM

Maximo for Nuclear Power | Maximo for Utilities (T&D) | Maximo Spatial
The demo room provides an open forum for your questions with answers from IBM Experts. There are no scheduled presentations, but please bring your questions.

19

Routine Substation Inspections
Stephanie Olson - ALLETE, Minnesota Power

Purpose: At Minnesota Power, we have embarked on a journey to optimize our use of Maximo for routine substation inspections and to expand our capabilities into preventative maintenance. Previously, inspection data was collected using paper forms, spreadsheets, and PDFs, making it difficult to analyze trends and monitor asset health effectively.

Content: We will share what we have done to address these challenges. We have leveraged several Maximo applications—including Assets, Meters, Condition Monitoring, Routes, and Inspection Forms. By configuring inspections in Maximo and enabling completion through EzMaxMobile, our technicians can now enter data directly in the field, with real-time updates to Maximo. Through collaboration with Maximo Administrators, Engineers, and Technician feedback, this streamlined process not only improves data accuracy and accessibility but also empowers us to perform meaningful data analysis. As a result, we can better monitor asset health, identify trends, and drive operational efficiencies across our organization.

20

MAS 9 Upgrade - User Analysis
Terry Kephart - Duke Energy

Purpose: The purpose of this session is to explain how user analysis, with a focus on security and licensing, supports a successful MAS 9 upgrade. Attendees will learn how evaluating user roles, permissions, and access models helps reduce security risk, optimize licensing costs, and establish a clean and sustainable user framework in MAS 9

Content: This session will examine user analysis activities performed during a MAS 9 upgrade, with emphasis on security and user licensing considerations. Topics include assessment of existing roles and security permissions to determine appropriate licensing levels, evaluation of whether to remediate legacy security groups and users or start with a clean security model, and review of security groups for excessive permissions. The presentation will cover the importance of identifying what's key to user's accessibility and how it impacts licensing structure. Key lessons learned will be shared to help attendees apply effective user analysis and security practices in their own MAS 9 upgrades.

21

Driving Operational Excellence in Power Generation Plants with MAS
Satya Narendra - IBM

Purpose: Power generation plants rely on complex, high-value assets such as turbines, generators, boilers, transformers, and auxiliary systems that must operate reliably over long lifespans. However, many power plants continue to manage these assets using fragmented systems, manual records, and reactive maintenance practices, leading to inefficiencies and increased operational risk.

Content: In this session we talk about how MVI, HSE, Generative AI, AIP and Mobile capabilities improve reliability, reduce operational costs, streamline workflows and meet strict regulatory requirements to drive operational excellence in power generation plants.

22

Maximo Mobile Implementation Best Practices and Troubleshooting
Michael Sielian & Shane Howard - IBM

Purpose: The objective of today's session is to help teams navigate the challenges of implementing a mobility solution for the first time as well as manage migrations to Maximo Mobile.

Content: This is an open discussion covering topics such as how to set expectations for an organization that is new to mobility to how Maximo Mobile works internally so implementers can make informed choices and discuss tools and techniques for identifying and addressing performance bottlenecks or other issues implementing teams may encounter. We'll explore what Maximo Mobile is, as well as what Maximo Mobile is not, as we discuss implementation best practices. And then, we'll dive into the Maximo Mobile architecture and its interactions with Maximo Manage.

23 Automated PR Line Item Price Updates from Online Catalogs

Ashley Frantz - Ashley Furniture

Purpose: Ashley Furniture has had Punchout for years, but it only addresses newly created PRs. System generated PRs could not easily be updated. Ashely has implemented functionality to programmatically update PR Line price and Item details from online vendor catalogs.

Content: See the value of this new functionality, utilized for a fully automated inventory replenishment process. Ashley will be assisted by Mike Popovic, P2Insight.

24 How Duke Energy Performs Vegetation Management CU Audits Within Maximo

Jonathan Phipps & Bennett Kittrell - Duke Energy

Purpose: Duke Energy Vegetation Management removes thousands of hazard trees that threaten our assets every year to ensure safety and reliability. The work is tracked in Maximo using CUs on work orders. Part of the process is auditing trees marked for removal to ensure they meet hazard tree criteria and pose a threat. Until recently, the audits were done outside the system on spreadsheets and attached to work orders. The process was rather cumbersome, so we developed a custom solution that allows us to perform the CU audits entirely within Maximo (and our mobile app). The new functionality allowed us to standardize the process for all regions and is flexible enough to meet both regulatory and Duke's own audit requirements.

Content: This session will cover both business process and perspective (work order lifecycle and how the CU audit process fits in, benefits of doing the audits in Maximo, and future use cases) as well as technical details (how we built it, how Maximo determines what to audit and when).

25 Maximo 101: Maximo Screens

Jade Warren - Great River Energy

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26 Maximo Optimizer: Smarter Technician Scheduling for FSM

Stephanie Michel & Pedro Solfa Spadacini - IBM

Purpose: In this session, you will see how IBM Maximo grows from a clean installation into a complete Field Service Management ecosystem. We will walk through the key concepts, configurations, and setup decisions that help planners, schedulers, dispatchers, supervisors, and technicians work together seamlessly.
You will learn how Maximo simplifies scheduling, automates dispatching, and boosts technician productivity. From building work orders in Manage to assigning the right technician and gaining real-time visibility into field operations, this presentation will show how Maximo becomes the backbone of a modern FSM environment.

Content: If you want to understand how leading organizations are modernizing their field service operations, reducing complexity, and delivering faster, higher-quality maintenance, this session is for you. Come discover how MAS can drive your next step toward service excellence.

27 Deploying and Leveraging Maximo AI Service for Intelligent Workflows in MAS Manage

Scott Wallace - IBM

Purpose: Modern asset management demands smarter workflows powered by AI. Maximo AI Service, integrated with IBM watsonX, brings advanced AI capabilities directly into Maximo Application Suite (MAS Manage).

Content: This session will provide a comprehensive overview of how AI Service enhances operational efficiency through features like intelligent assistants, predictive field value recommendations, and automated problem code determination. Attendees will learn how to configure, train, and deploy AI models within MAS clusters to unlock actionable insights & improve decision-making. We'll also share best practices for optimizing AI-driven workflows and ensuring seamless integration with existing processes.

12:00p-1:00p **LUNCH - A plated lunch to promote discussion among attendees.** ***Sponsored By:*** GRABLE SERVICES *Technology. Solutions. Results.*

IBM DEMO ROOM

Maximo Manage Work and Asset Management | Maximo Mobile - Work Orders, Inspections & Service Requests | Maximo Monitor and Health
The demo room provides an open forum for your questions with answers from IBM Experts. There are no scheduled presentations, but please bring your questions.

28

Building a Utility Value Framework in Maximo Asset Investment Planning
Philippe Jette & Allie E - IBM

Purpose: Learn how to create a utility-specific Value Framework in Maximo Asset Investment Planning to align asset sustainment decisions with strategic objectives.

Content: This hands-on session will cover key concepts, guide you through building the framework, and demonstrate how to optimize a plan against it and review the results.

29

Leveraging Technology for Asset Automation – Duke Energy's Approach
Terri Bailey - Duke Energy

Purpose: Duke Energy installs, replaces, and removes thousands of Transmission Assets each year. The design and execution of this work, as well as creation, maintenance and disposition of the Assets are tracked in Maximo utilizing Work Orders and Compatible Units (CUs). Until recently, Asset records were manually created in Maximo and GIS based on data captured on paper or electronic forms. This process was inefficient and increased the potential for HP errors and data integrity issues. A solution was developed to automate the Asset creation activity. This functionality improves efficiency, data availability and accuracy of operational and financial Asset and Location information, while keeping Maximo and GIS systems in sync.

Content: This session will review Duke Energy's journey to enhance Asset and Location data management using asset automation. The discussion will describe the collection and progression of Transmission Asset information through the use of Compatible Units (CUs), and how this data ultimately drives the creation and updating of Asset records through Maximo configurations, code, and integrations. Topics include CU attribute population and identification of data owners, use of Asset and Location templates, asset and location hierarchy placement, integration with GIS, and the use of Maximo work orders to support asset automation. Real-world examples and key lessons learned will be shared to demonstrate how this functionality supports regulatory compliance, maintenance execution, financial accuracy, and reporting.

30

Maximo for Real Estate and Facilities (MREF) Deployment: Mastering the CLI
Tarsis A R Parreiras & Rafael Teixeira - IBM

Purpose: This session provides a dual-focused look at Maximo for Real Estate and Facilities (MREF): first, by reviewing the key architectural components that enable integrated facility and real estate management, and second, by demonstrating how to deploy these components efficiently using the Command Line Interface (CLI).

Content: We begin by establishing the fundamental architectural shift: the move from TRIRIGA's traditional application server and process server deployment to MREF's containerized model on Red Hat OpenShift, managed entirely through the Maximo Application Suite (MAS) Operator.We will quickly examine how MREF functions as an application within the MAS platform, where the change is from discrete server deployments to OpenShift Pods, and Centralized Core Services, where Authentication and User Management shift from TRIRIGA-level configuration to being handled by the MAS Core and Foundation Services. The core of the presentation will then transition to the CLI deployment workflow.

31

Unlock Maximo Mobile: Configuration Secrets and Best Practice
Vinicius Alfonso Santana - IBM

Purpose: Why make technicians adapt to a new tool when you can adapt the tool to them?

Content: Discover how to customize Maximo Mobile to fit your business needs—without coding or IT expertise. In this interactive demo, learn how to clone apps, update labels and data sources, enable/disable features, and publish new applications using best practices with the Maximo Application Framework Configuration Tool. Join us and see how easy it is to make Maximo Mobile work the way your team works!

32

Back and Forth with Procurement
Brent Henchen - Cogentrix Energy

Purpose: The purpose of this session is to explain Cogentrix's end-to-end procurement integration between Maximo and PeopleSoft Financials and to share lessons learned from managing a highly integrated, bi-directional process. Attendees will gain insight into common challenges, error-reduction strategies, and design considerations for maintaining reliable procurement interfaces that meet business and financial requirements. In essence, how to keep the Accountants happy while also keeping our Maintenance Managers happy.

Content: The presentation will highlight challenges encountered across multiple interfaces, approaches used to reduce errors and improve reconciliation, and key lessons learned that influenced interface design and monitoring. New ideas and improvements for interfacing will be discussed, along with an explanation of why this approach remains the best fit for Cogentrix's business needs.

33

LCRA Telecom – Growing for the Future
Sue Brashar - LCRA

Purpose: Standing up a brand new private LTE (pLTE) system within LCRA is a large undertaking. Updating our billing procedures to match new customer offerings is even more challenging.

Content: This session will present and discuss how LCRA initially met the request to bill customers using Maximo. The discussion will then transition into a more robust system that facilitates additional customers and Telecom devices. Expanding the Telecom portfolio within LCRA to include setting up a privately owned LTE system for customer utilization via Maximo Service Provider will also be covered.

34

Maximo 101: Assets Application
Rick Ulrich - MUWG

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. This interactive session will take a high-level look into the Maximo Assets application. 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.

35

Explore Use Cases with Maximo Visual Inspection
Ed Neubecker - IBM

Purpose: Explore scenarios and use cases to explore with Maximo Visual Inspections. We will also share the new features of MVI called Visual Prompting and help attendees see how to train a vision model much faster than traditional models.

Content: Come learn about advances in Maximo Visual inspection and ideas on how to apply AI Vision to enhance asset based inspections. This session will cover the new capabilities called "Visual Prompt Lab" and explore ideas of how to apply MVI to media collected from the field related to drones, gopros of other media sources like this.

36

Using the Power of Generative AI and WatsonX to Evolve Maximo
Stan Smith & Michael Dawson - IBM

Purpose: Generative AI has provided a new and very powerful tool that is being leveraged within Maximo. ite.
Content: This presentation will detail what users can take advantage of today (out of the box in MAS 9.1 and 9.2) and what is coming in 2026 and beyond. We will also discuss how customers and partners can extend what we provide from IBM.

2:15p-2:45p **AFTERNOON BREAK - refreshments provided**

IBM DEMO ROOM

Maximo Health, Safety & Environment | Reliability Strategies
The demo room provides an open forum for your questions with answers from IBM Experts. There are no scheduled presentations, but please bring your questions.

37

Dashboard-Driven UX of MAS 9.1
Jordan Smith - IBM

Purpose: Let's explore the new dashboard capabilities in MAS and see how they deliver an optimized experience for every user through KPIs, charts, work queues, and personalized settings.

Content: Using a pre-9.2 test environment, we'll create, configure, and share a dashboard with other users, enabling them to complete many basic workflows without relying on a power app. Finally, we'll review what's coming in version 9.2 and beyond.

38

Using Land Services Maximo on Right of Way Projects
Susan Cannella - Duke Energy

Purpose: The purpose of this session is to present how Land Services Maximo is used to track right of way work, manage prerequisites, generate documents, and submit to Data Management for indexing in CASTPro.

Content: This session will demonstrate the steps to assigning and taking ownership of prerequisites, entering data, and selecting values to document work and creating easements generated through Maximo. The presentation will also cover required fields for data entry and the steps to submitting documents to Data Management utilizing the Communication Log. Attendees will gain insights as to how future environments could be created to enhance operational efficiency based on the success of Land Services Maximo.

39

Higher Power: Setting a new standard for modern asset management at East Kentucky Power Co-operative
Adrienne Duvall - East Kentucky Power Co-Operative

Purpose: In 2021, EKPC faced a critical challenge: more than 99,000 assets were being managed through aging, fragmented data systems and paper-based processes. These inefficiencies slowed daily operations, limited capabilities, and left too much room for error.

Content: It was clear that a bold transformation was needed to help it advance its mission to deliver reliable and affordable energy to 1.1 million Kentuckians through its 16 owner member co-operatives. Embracing innovation, EKPC launched a multi-year asset management modernization program, placing IBM Maximo at its core. Today, more than 800 users across Generation, Transmission, Substations, and beyond rely on Maximo to streamline workflows, harness real-time analytics, and unlock new levels of operational insight. With the next step - a move to the Maximo Application Suite - on the horizon, EKPC is setting the stage for even greater efficiency and resilience. Adrienne will be assisted by Tony Roth, Cohesive.

40

Boralex's bold leap to MAS: What's driving it and the vision ahead
Julien Schrapp & William Lechasseur - Boralex

Purpose: Boralex, a renewable energy leader, has initiated a strategic upgrade to the IBM Maximo Application Suite (MAS) to modernize its asset management ecosystem and strengthen operational efficiency. Central to this initiative is the integration of SAP and the EzMax mobile solution, enabling field teams to access and update asset data in real time, thereby improving responsiveness and decision-making

Content: This presentation will outline the technical configurations, strategic choices, and processes that guided the migration to MAS. Key focus areas include system architecture adjustments, mobile/SAP integration strategies, and data migration tailored to the operations. The session will also highlight challenges encountered during the transition. Attendees will gain an understanding of how a well-planned migration can enhance asset visibility, streamline operations, and position organizations for scalability and resilience in the evolving energy sector. Julien & William will be assisted by Rahul Jain, Cohesive Solutions.

41

Maximo Spatial: What's New and What's Coming Next
Thiago Geraldi & Thiago Iunes- IBM

Purpose: Discover the latest evolution of Maximo Spatial and how it can sharpen your asset management strategy.

Content: This session highlights the improved interface, smarter tools, and the enhancements that make Spatial faster, more intuitive, and more effective across web and mobile. Whether you already use Spatial or are just getting started, you'll walk away with clear, practical insights on how to get more value from maps, spatial intelligence, and location-based workflows in MAS — today and in the roadmap ahead.

42

Hands-On Enablement at USC IBM Maximo Innovation Lab: Exploring MAS Capabilities in a Live Operational Environment

Anthony Ferrara & Tom Woginrich - IBM

Purpose: The University of South Carolina's (USC) IBM Maximo Innovation Lab bridges education and industry to advance asset management. The Lab provides hands-on experience with Maximo Application Suite (MAS), integrating Operational Technologies (OT), Internet of Things (IoT) data, and AI-driven capabilities. Connected to USC's live utility plants, it demonstrates real-world applications such as sensor data integration, asset health scoring, mobile work execution, and AI-enabled visual inspection and assistance. By leveraging ISO 14224 standards, FMEA governance, and multivariable asset health scoring, the lab showcases how foundational principles evolve into reliability-centered maintenance and operational excellence.

Content: This session includes a demo of the USC MAS v9.1, highlighting OT/IoT connectivity, asset health scoring, and visual inspection workflows, along with lessons from our journey.

43

Maximo 101: The Purchase Order Application

Destinie Prince - Oncor & Yewande Marshall - Southern Company

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44

Leveraging the Maximo Inspections module in MAS 9.1 for asset inspections and follow-up work orders at Mount Pleasant Waterworks

Matthew Scruggs - Mount Pleasant Water Works

Purpose: The Maximo Inspections module enables organizations to streamline inspection processes, improve regulatory compliance, and optimize asset performance.

Content: This presentation will demonstrate how Mount Pleasant Waterworks uses Inspections with automation scripts we've developed to trigger follow-up actions. Attendees will learn the fundamentals of inspection management, see how we configure inspection questions, and view examples of conditional expressions and automation scripts we've developed. Join us as we demonstrate generating inspections attached to PM based work orders, share implementation best practices & custom configs.

45

Maximo Monitor APM for Utilities: From Transformer Metrics to Health Based Maintenance

Abhinav Agastya - IBM

Purpose: See a practical pattern for utilities APM: model assets, specs, and large meter groups in Maximo Manage, stream IoT and batch metrics through Maximo Monitor, map names for auto linking, then calculate health scores that trigger inspections and repairs.

Content: This session presents a walkthrough of applying Maximo Monitor for APM alongside Maximo Manage to improve reliability for critical utility assets such as transformers and substation equipment. It covers use of asset hierarchy, classifications and specifications, and structuring meter groups at scale to handle inspection readings, lab tests, and online sensor data. It then explains how Maximo Monitor ingests both streaming and batch metrics from multiple sources, the data quality checks used to build trust in readings, and the approach for keeping Monitor metrics aligned to Maximo meters through a consistent naming convention that supports automated linking. It also describes how health insights support planning and reliability decisions, and how outcomes connect back into work management to trigger inspections and maintenance, route work to the right teams, and track results over time.

4:00p-4:30p

CLOSING SESSION & REMARKS

Please use Guidebook App to complete the Conference Evaluation to be eligible to win door prizes. Then, make your way to the closing session. ***Must be present to win a prize!***

OPTIONAL TRAINING & CERTIFICATION PROGRAMS

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

Maximo Asset Management Training for Managers, Engineers & Supervisors | Instructor: Clay Cook

- This training provides an intermediate-level view of how Maximo supports effective asset management from both a strategic and operational perspective. Designed for leaders and technical professionals who oversee asset-intensive operations, the session focuses on how Maximo enables better decision-making, governance, and performance across the asset lifecycle. Using practical examples, participants will learn how to interpret Maximo data and leverage the platform to improve asset management outcomes.

Planner Scheduler Certification - Level 1 | Instructor: Rick Ulrich

- This introductory training establishes the foundational concepts of planning and scheduling and how they support an overall asset and maintenance management program. Participants will learn how Maximo is used to plan work, manage resources, and support scheduling decisions using industry best practices. The session combines conceptual instruction, practical examples, and light hands-on activities.

Planner Scheduler Certification - Level 2 | Instructor: Annie Wooten

- This intermediate-level training builds on foundational planning concepts and focuses on using Maximo to develop high-quality, executable work plans. Participants will explore advanced planning techniques, preventive maintenance strategies, and corrective work planning using real-world examples. The session blends instructor-led demonstrations with hands-on exercises.

Planner Scheduler Certification - Level 3 | Instructor: Matt Midas

- This advanced training focuses on the execution and optimization of schedules for work that has been planned in Maximo. Participants will learn how to manage short- and long-range schedules, address interruptions and emergency work, and use scheduling metrics to improve performance. The session is scenario-driven and demonstration-based, emphasizing decision-making and best practices. *This level includes taking the MUWG Planner Scheduler Certification exam and requires prior attendance of at least one of the Level 1 or Level 2 Training classes.*

Compatible Unit Training | Instructor: Bill Holt

- "Hands-On Lab" (bring your laptop) – This training introduces attendees to the setup and practical use of Compatible Units (CUs) within the Maximo Utilities industry solution. Designed for estimating and planning scenarios, the session focuses on how CUs support consistent, repeatable estimates and how those estimates flow into work orders. Participants will follow along as the instructor demonstrates CU configuration, creation, and acceptance, with an emphasis on best practices and real-world utility use cases.

MAS 8 Supply Chain Overview | Instructor: Amy Tatum

- "Hand-On Lab" (bring your laptop) – This training provides an introductory to intermediate, task-oriented overview of Supply Chain functionality in Maximo Application Suite (MAS). The session walks through core supply chain processes and related capabilities now available within MAS, including inventory, purchasing, count books, and Supply Chain Mobile applications. Designed as a follow-along, hands-on lab, the training focuses on how common supply chain activities are performed in MAS and how they compare to legacy Maximo workflows.

Maximo for Business Process Support & Automation | Instructor: Jade Warren

- "Hand-On Lab" (bring your laptop) – This training introduces attendees to Maximo's configuration and automation capabilities and how they can be used to effectively support business processes across the platform. Taking a process-agnostic approach, the session focuses on practical tools and techniques that can be applied to any Maximo functional area, including work and asset management. Participants will learn how to enhance out-of-the-box functionality and implement business-specific use cases using standard Maximo tools.

DAY 3 - FRIDAY, APRIL 10
PARTNER MEETINGS

REGISTRATION REQUIRED
MEALS NOT PROVIDED FOR PARTNER MEETINGS

IBM Practical Training on Using Maximo Spatial

- 8:30a-11:30a
- Enable participants to effectively use Maximo Spatial, covering all stages of integration with ArcGIS. Participants will learn everything from creating a Webmap to synchronizing real-time data, with a strong emphasis on utilizing maps in Maximo Mobile. The course will also introduce the latest features and functionalities of Maximo Spatial, highlighting their value for daily operations.
- For a detailed agenda or to attend, please email Thiago Geraldi - tgeraldi@ibm.com

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IBM Maximo Nuclear Power Development

- 9:00a-11:00a
- To attend, please email Derek Valine - derek.valine@ibm.com

THANK YOU!

Visit MUWG.org for more information about the organization.

MUWG
MAXIMO UTILITY WORKING GROUP

REVISED: JAN 23, 2026