



**2023 Spring Conference**  
**Hosted By**

**CoServ<sup>®</sup>**

**April 17 - 20**

***In Dallas (Allen), TX***

***Conference Theme***

**"Maximo Basics and Beyond"**

**(Including 33 breakout sessions with "live" Maximo)**

## Special Activities

**TOPGOLF – Preconference Outing**  
**Monday, April 17 - 11:00 AM to 2:00 PM**  
**Location: TOPGOLF Allen**  
*TOPGOLF is a separate registration fee.*

**IBM Maximo Location Based Services Development Partner Meeting**  
**Monday, April 17 - 9:00 AM to 11:00 AM**  
**Location: Sunrise**  
**By invitation Only, to attend please email João Souto Maior ([jmaior@br.ibm.com](mailto:jmaior@br.ibm.com))**

**MaxTECH – Maximo Technical User Group Meeting**  
**Monday, April 17 - 9:00 AM to 11:00 AM**  
**Location: Twilight**

**MAS Maximo Application Suite Discovery Session**  
**Monday, April 17 - 2:30 PM to 4:30 PM**  
**MAS Monitor - Health - Predict - Assist - Safety - Mobile - MVI,**  
**Why wait - Better together with Maximo Manage**  
Stan Smith IBM - Program Director, Maximo Product Management and Supporting Product Architects and Engineers  
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.  
**Registration Required**  
**Location: Sunrise**

**MUWG First Timers Orientation**  
**Monday, April 17 - 4:30 PM to 5:00 PM**  
**Location: Sunrise**  
**Using Guidebook MUWG Conference Mobile App**  
**Monday, April 17 - 5:00 PM to 5:30 PM**  
**Location: Sunrise**

**MUWG Hospitality Night – Sponsored by**

 **total  
resource  
management &**

 **P2insight**  
Maximo E-Commerce  
Enablers

**Monday, April 17 - 5:30 PM to 8:00 PM**  
**Location: The Green & The Patio**  
**(Inclement weather location - The Corral)**  
**Cocktails and “Lite Bites” provided**  
**Music Sponsored by Polaris Solutions**

**IBM Maximo Demonstration Room**  
**Location: The Glassroom**  
**Tuesday, April 18 - 1:00 PM to 4:30 PM**  
**Wednesday, April 19 - 10:15 AM to 4:00 PM**

**Demo Room Schedule**

|           |                      |  |
|-----------|----------------------|--|
| Tuesday   | 1:00 PM<br>2:15 PM   | <b>Maximo 7.6 - Work and Asset Management</b><br>Solution Engineers: Steven Shull & Jim Seeber   |
|           | 2:45 PM<br>4:00 PM   | <b>Maximo 7.6 - Supply Chain</b><br>Solution Engineers: Steven Shull<br><b>Maximo Monitor – Health &amp; Predict Utilities</b><br>Stephen Bosak, Solutions Engineer: John Douglas Sr. Prod Mgr |
| Wednesday | 10:45 AM<br>12:00 PM | <b>Maximo For Nuclear Power and Power Gen,<br/>Fleet Management – Transportation Manager</b><br>Solution Engineers: Chuck Bandy<br>Solution Engineers: Jim Seeber                              |
|           | 1:00 PM<br>2:15 PM   | <b>Maximo Utilities for T&amp;D<br/>HSE – Health Safety &amp; Environment</b><br>Solution Engineers: Matt Lister   |
|           | 2:45 PM<br>4:00 PM   | <b>Maximo Scheduler – Maximo Mobile<br/>Appointment Scheduling &amp; Dispatch</b><br>Solution Engineers: Steven Shull  |

**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.**

**Want to see and log into an actual MAS system? Swing by to play in  
 Interloc's MAS Sandbox!**

**Location: The Core**  
**Tuesday, April 18 - 1:00 PM to 4:30 PM**  
**Wednesday, April 19 - 10:15 AM to 4:00 PM**

## Vendor Night

Tuesday, April 18

Meet over 40 Vendors that provide products and services associated with Maximo

Location: Terrell Hall I & III

Come and enjoy a full buffet and open bar

Starts at 5:00 PM until 8:30 PM, Dinner Buffet begins at 5:30 PM

## MUWG Training Programs

Thursday, April 20 - 8:00 AM to 3:00 PM

Continental Breakfast 7:00 to 8:00 AM – Location: Terrell Hall II

*Breakfast & Lunch provided for training attendees only.*

- Maximo Asset Management Training for Managers, Engineers & Supervisors – Clay Cook – Location: Moonlight
- Planner Scheduler Certification - Level 1 Training – Rick Ulrich – Location: Sunset
- Planner Scheduler Certification - Level 2 Training – George Perry – Location: The Percolator
- Planner Scheduler Certification - Level 3 Training – Matt Midas – Location: The Spark
- Supply Chain Training - Supply Chain Overview - Contracts/Strategic Planning/Tracking Transactions to Work Orders – Amy Tatum – Location: Sunrise
- Maximo Basic's – Maximo's ability to Support Business Processes – The Basics of Maximo Process Support & Automation training empowers attendees to leverage Maximo's configuration tools to effectively support key business processes. 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. – Jade Warren – Location: Twilight

## IBM Maximo Nuclear Power Development Partner Meeting

Thursday, April 20 - 9:00 AM to 11:00 AM

By invitation Only, to attend please email Donna Grant: [donna.grant@ibm.com](mailto:donna.grant@ibm.com)

*Lunch is not provided*

Location: The Classroom

## IBM Maximo Health & Predict Development Partner Group/Advisory Council

Thursday, April 20 - 9:00 AM to 11:00 AM


By invitation Only, to attend please email Terry Saunders: [terry.saunders@us.ibm.com](mailto:terry.saunders@us.ibm.com)

Calling all Asset SME's for Substation & Generation: Advise Health & Predict Product Capabilities and Direction join our Development Team and Black & Veatch

*Lunch is not provided*

Location: The Workshop

## Monday, April 17, 2023

| Time                | Track                  | EVENT/PRESENTATION  | Presenter                                | Location  |
|---------------------|------------------------|---|--|---|
| 9:00 AM<br>11:00 AM | All Attendees          | <p style="text-align: center;"><b><u>IBM Maximo Location Based Services Development Partner Meeting</u></b></p> <p style="text-align: center;">By invitation Only, to attend please email João Souto Maior (<a href="mailto:jmaior@br.ibm.com">jmaior@br.ibm.com</a>)</p>   | João Souto<br>Maior<br>IBM               | Sunrise   |
| 11:00 AM<br>2:00 PM | All Attendees          | <p style="text-align: center;"><b><u>Preconference TOPGOLF Outing</u></b></p> <p style="text-align: center;">Not your ordinary Golf tournament! Network with Vendors and Conference Attendees while enjoying unlimited Topgolf play and buffet. This event is great for all skill levels! Not a golfer? No problem! Join us for food and great company!</p> <p style="text-align: center;"><i><u>TOPGOLF is a separate registration fee.</u></i></p>  |  | TOPGOLF<br>Allen  |
| 2:00 PM<br>4:00 PM  | All Attendees          | <p style="text-align: center;"><b><u>MAS Maximo Application Suite Discovery Session</u></b></p> <p style="text-align: center;">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.</p> <p style="text-align: center;"><b>Registration Required</b></p> | Stan Smith<br>IBM<br>Program<br>Director | Sunrise   |
| 2:30 PM<br>4:30 PM  | Information Technology | <p style="text-align: center;"><b><u>MaxTech – Maximo Technical User Group Meeting</u></b></p> <p style="text-align: center;">The MaxTECH User Group is designed to allow Maximo Administrators and Technical support staff a place to ask and answer technical questions around Maximo. Learn from each other, collaborate and help improve Maximo in your organization.</p>   | MaxTech                                  | Twilight  |
| 4:30 PM<br>5:00 PM  | General                | <p style="text-align: center;"><b><u>MUWG First Timers Orientation</u></b></p> <p style="text-align: center;">First time attendee? Join us to learn how to get the most out of our conference.</p>  | Clay Cook<br>MUWG<br>President           | Sunrise   |
| 5:00 PM<br>5:30 PM  | General                | <p style="text-align: center;"><b><u>Using Guidebook MUWG Conference Mobile App</u></b></p> <p style="text-align: center;">First time attendee? Join us to learn how to get the most out of our conference using our mobile app.</p>  | Rick Ulrich<br>MUWG<br>Sr. Manager       | Sunrise   |
| 5:30 PM<br>8:00 PM  |                        | <p style="text-align: center;"><b>MUWG Hospitality Night</b></p> <p style="text-align: center;">Sponsored by:</p> <div style="display: flex; justify-content: center; align-items: center;">   </div> <p style="text-align: center;"><b>Cocktails and “Lite Bites” provided</b></p> <p style="text-align: center;"><i>Music Sponsored by Polaris Solutions</i></p>   |  | The Green & The Patio (Inclement weather location - The Corral) |

## Day 1 – Tuesday, April 18, 2023 (Morning Sessions)

| Time                 | Track                          | EVENT/PRESENTATION   | Presenter   | Location           |
|----------------------|--------------------------------|--|---|--------------------|
| 7:00 AM<br>8:00 AM   | All Attendees                  | <br><b>Final Registration/Continental Breakfast Sponsored by</b>  |   | The Porch          |
| 8:00 AM<br>8:30 AM   | General                        | <u>Opening Remarks: Opportunities &amp; Workshop Objectives, Introductions</u> <ul style="list-style-type: none"> <li>Introductions</li> <li>MUWG Business Updates</li> <li>Agenda updates</li> <li>Guidebook MUWG Conference Mobile App</li> </ul>  | George Perry<br>MUWG MGNT. Committee<br>NYPA                            | Starlight Ballroom |
| 8:30 AM<br>9:00 AM   | General                        | <p style="text-align: center;"><b>CoServ KEYNOTE PRESENTATION</b></p> <p style="text-align: center;"><b>CoServ – Investing in Tomorrow</b></p> <p>CoServ is an Electric Cooperative and Gas Distribution company, serving 8 counties in North Texas with over 451,000 combined electric and gas meters. Over the past 85 years, CoServ has transformed into one of the fastest growing co-ops in the country. Since 2016, Maximo has been an invaluable tool to help CoServ manage unprecedented growth within our territory and various utility industry issue. CoServ plans to continue to leverage Maximo to provide operational value and benefits and maintain channels for two-way communication with our members and customers.</p>   | Donnie Clary<br>CEO<br>CoServ   | Starlight Ballroom |
| 9:00 AM<br>9:45 AM   | General                        | <p style="text-align: center;"><b>CoServ Presentation</b></p> <p style="text-align: center;"><b>Maximo Basics and Beyond at CoServ</b></p> <p>Gain insight into CoServ's planning efforts to increase Maximo usage incrementally and methodically over the past 8 years. Combining effective change management and IT strategy, these efforts have exemplified the ability to tackle things in manageable pieces, build adoption and acceptance along the way, and gain enough support that users now come to us asking for more. Applying lessons learned from one implementation to the next for continuous improvement, the organization will soon tackle the implementation of Utilities and AppPoints Licensing.<br/>Jenn will be assisted by Amy Tatum, Starboard Consulting</p> | Jenn Camp<br>CoServ   | Starlight Ballroom |
| 9:45 AM<br>10:15 AM  | General                        | <p style="text-align: center;"><b>IBM Maximo Presentation</b></p> <p style="text-align: center;"><b>IBM Maximo Application Suite – Product Update &amp; Roadmap Overview</b></p> <p>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&amp;A.</p>  | Stan Smith<br>IBM Program Director,<br>Maximo Product Management<br>IBM | Starlight Ballroom |
| 10:15 AM<br>10:45 AM |                                | <br><b>Morning Break Sponsored by</b><br><i>An opportunity to network with your peers and share knowledge/experience</i>   |   | The Porch          |
| 10:45 AM<br>12:00 PM | Power Generation               | <p style="text-align: center;"><b>Power Generation Kick-Off Session</b></p> <p>The Power Generation Kickoff serves two purposes. First, it offers the opportunity for power generation attendees to meet and network and secondly learn more about how different utilities are using Maximo. A brief introduction of sessions at this workshop will be reviewed and then, based upon discussion and topics of interest identified during the introductions, we will have a facilitated discussion on some of the topics.</p>   | Moderators<br>George Perry<br>NYPA<br>Clay Cook<br>MUWG                 | Moonlight          |
| 10:45 AM<br>12:00 PM | Electric Trans. & Distribution | <p style="text-align: center;"><b>Transmission/Distribution Kick-Off Session</b></p> <p>This Kickoff Session is an opportunity to Network with others attending from Transmission and Distribution. Key questions will be raised for group discussion that address current challenges facing T&amp;D organizations. A brief introduction of sessions at this workshop will be reviewed and the Theme "MUWG 25 Years – Learning from the past and</p>   | Moderators<br>Terry Saunders<br>Vinicius Garmatz                        | Sunrise            |

|                      |                                     |  |   |                    |
|----------------------|-------------------------------------|--|---|--------------------|
|                      |                                     | Forging ahead™ will be explored with utility participants as what might they do differently migrating to MAS 8 over the next 3 years. What new capabilities might they explore and consider implementing.  | João Souto<br>Maior<br>IBM  |                    |
| 10:45 AM<br>12:00 PM | Mobility<br>(MUGM)                  | <b><u>Mobility Kick-Off Session</u></b><br><br>Introduction of Mobility members at this conference followed, by an overview of upcoming Mobility breakout sessions. Then, based upon discussion and topics of interest identified during the introductions, we will have a facilitated discussion on some of the topics.   | <u>Moderator</u><br>Janie Mann<br>CoServ                                  | Sunset             |
| 10:45 AM<br>12:00 PM | Supply Chain<br>(MSCUG)             | <b><u>Supply Chain Kick-Off Session</u></b><br><br>An introduction of the Maximo Supply Chain User Group Management Committee & introductions from participants, followed by a brief discussion on upcoming Supply Chain Breakout Sessions. Then, based upon discussion and topics of interest identified during the introductions, we will have a facilitated discussion on some of the topics and Supply Chain best practices. | <u>Moderator</u><br>Cristy Bennett<br>Oglethorpe<br>Power                 | Twilight           |
| 10:45 AM<br>12:00 PM | Water,<br>Wastewater &<br>Pipelines | <b><u>Water, Wastewater and Pipelines Kick-Off Session</u></b><br><br>An overview of the upcoming Water, Wastewater & Pipeline breakout sessions, followed by an introduction of Water, Waste Water & Pipeline members. Then, based upon discussion and topics of interest identified during the introductions, we will have a facilitated discussion on some of the topics.   | <u>Moderators</u><br>Mel Bennett<br>MPW<br>Wayde Prejean<br>Kinder Morgan | The<br>Percolator  |
| 10:45 AM<br>12:00 PM | Information<br>Technology           | <b><u>Information Technology Kick-Off Session</u></b><br><br>Introduction of IT members at this conference followed, by an overview of upcoming IT breakout sessions. Then, based upon discussion and topics of interest identified during the introductions, we will have a facilitated discussion on some of the topics.   | <u>Moderators</u><br>Tom Sarasin<br>IBM<br>Rick Ulrich<br>MUWG            | The Spark          |
| 12:00 PM<br>1:00 PM  | All attendees                       | <b>Networking Lunch Sponsored by <i>TRINMAX</i></b><br><b>A plated lunch to promote discussion by interest group: Power Gen, T&amp;D, Supply Chain, Water &amp; Wastewater, IT and Transportation/Fleet</b>  |   | Terrell Hall<br>II |


### **DAY 1 – Tuesday, April 18, 2023 (Afternoon First Sessions)**

**\*\*\*\* Grey shaded Breakout Session's indicate that Maximo will be demonstrated as part of the session \*\*\*\***

|                                  |                                     |   |  |           |
|----------------------------------|-------------------------------------|---|--|-----------|
| <b><u>Breakout Session 1</u></b> |                                     |   |  |           |
| 1:00 PM<br>2:15 PM               | MAS<br>Maximo 8                     | <b><u>IBM Maximo Application Suite – Product Update &amp; Roadmap Deep Dive</u></b><br><br><b><u>Purpose:</u></b> Innovating Maximo for tomorrow – an update on offerings and roadmap from IBM with interactive Q&A.<br><br><b><u>Content:</u></b> 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, AI, sustainability, industry driven functionality, and modernization.  | Stan Smith<br>and<br>IBM Team<br>Members               | Moonlight |
| <b><u>Breakout Session 2</u></b> |                                     |   |  |           |
| 1:00 PM<br>2:15 PM               | Water,<br>Wastewater &<br>Pipelines | <b><u>What Do You Mean I Voided the Warranty on My New Equipment?</u></b><br><br><b><u>Purpose:</u></b> Construction of a multimillion-dollar capital project at the treatment plant is wrapping after years of contractors being onsite. Weekly project status meetings are ending, and the substantially complete milestones of the project have been met. Responsibility for the project equipment is being transitioned from the project team to facility operations ownership. Unfortunately, asset specifications were not collected as equipment was installed, and the contractor has provided all O&M information as a single file on a thumb drive. Where do you start to establish a preventative maintenance schedule to meet all equipment warranty requirements?<br><br><b><u>Content:</u></b> This presentation will discuss changes the Metropolitan St. Louis Sewer District (MSD) has made to incorporate an Asset Management component into their project delivery process. Revisions to MSD's Engineers Joint Contract Documents Committee and Green Book contract procurement language incorporate new Asset Management requirements during the design and construction phases of the project to facilitate timely information transfer. Templated | Ed Cope<br>Metropolitan<br>St. Louis<br>Sewer District | Sunrise   |



|                    |                                  |   |   |                |
|--------------------|----------------------------------|---|---|----------------|
|                    |                                  | asset specification sheets have been developed to mirror the asset classifications in MSD's Maximo system, and procedural improvements implemented to streamline data integration.  |   |                |
| 1:00 PM<br>2:15 PM | Power Generation                 | <p style="text-align: center;"><b><u>Breakout Session 3</u></b></p> <p style="text-align: center;"><b><u>Leveraging Maximo Work Order Data to Develop a "Reliability Curve"</u></b></p> <p><b>Purpose:</b> This technical brief describes an initial effort in the investigation of empirical methods in data science, such as statistical failure modeling and supervised machine learning algorithms, to better inform power plant asset management programs. Power plants have collected a wealth of maintenance work orders in their databases that can be mined for a variety of insights. This is essential for planning because when a critical piece of equipment fails it can result in repairs that are costly in terms of parts, labor, and potential plant shutdown.</p> <p><b>Content:</b> This session will discuss how work order data is leveraged to aid in making decisions regarding equipment reliability for power plants. Risk-based equipment asset management programs look to data analytics to help predict when or why an asset may fail and develop preventative and corrective strategies.</p> | Ricky Swanepoel<br>Electric Power Research Institute (EPRI) | The Percolator |
| 1:00 PM<br>2:15 PM | Mobility (MUGM)                  | <p style="text-align: center;"><b><u>Breakout Session 4</u></b></p> <p style="text-align: center;"><b><u>Mobile Inspections at CoServ</u></b></p> <p><b>Purpose:</b> Learn how field users are using Maximo 7.6.1.2 and mobile connection to complete both planned and unplanned asset inspections in a timely manner.</p> <p><b>Content:</b> Review of processes to complete inspections utilizing forms for Assets and Locations, and meter readings and specifications on a work order. In addition to use of routes and preventive maintenance schedules.</p>   | Janie Mann<br>CoServ  | Sunset         |
| 1:00 PM<br>2:15 PM | Supply Chain (MSCUG)             | <p style="text-align: center;"><b><u>Breakout Session 5</u></b></p> <p style="text-align: center;"><b><u>Skookum Logistics Evolution – Applying Solutions from Leading Companies</u></b></p> <p><b>Purpose:</b> Skookum maintain facility and utilities primarily at DoD installations. Over the past 5 years, Skookum has embarked on a focused effort to improve logistics processes and systems leveraging best practices from leading companies – a primary source being the MUWG Supply Chain Management presentations.</p> <p><b>Content:</b> This session will discuss organizational and change management, multi-site standardization, storeroom automation using mobility, eProcurement, transactional integration and business analytics optimizing PowerBi including dashboards and performance improvements.</p>   | Scott Smith &<br>Richard Pierce<br>Skookum                  | Twilight       |
| 1:00 PM<br>2:15 PM | General / Information Technology | <p style="text-align: center;"><b><u>Breakout Session 6</u></b></p> <p style="text-align: center;"><b><u>Maximo Integration: Friend or Foe</u></b></p> <p><b>Purpose:</b> Utilities have a complex enterprise software ecosystem. Maximo needs to communicate with finance, HR, Time Reporting, GIS, Supply Chain, Scada and on and on. In this session we will explore the many capabilities of the Maximo Integration Framework (MIF) and how to leverage across your enterprise.</p> <p><b>Content:</b> The MIF provides many capabilities for integrating data with Maximo. This can lead to multiple choices as to which integration approach should be used. In this session we will explore different integration options available in Maximo and discuss reasons why you might choose one integration approach versus another.</p>  | Tom Sarasin<br>IBM  | The Spark      |
| 1:00 PM<br>2:15 PM | General                          | <p style="text-align: center;"><b><u>Breakout Session 7</u></b></p> <p style="text-align: center;"><b><u>Maximo 101 – What is Maximo?</u></b></p> <p><b>Purpose:</b> This session is offered for attendees who are new to Maximo or who have very little experience with Maximo.</p> <p><b>Content:</b> Maximo is an Asset and Work Management system. This session will discuss Maximo and what it does, how it uses a modular approach to manage all aspects of an asset and work management program, and why it is the right tool to do so for many utilities across the world. Discussion will include a tour of the Maximo homepage and application screens, as well as a demonstration of how to navigate inside the software.</p>  | George Perry<br>New York Power Authority                    | The Workshop   |
| 1:00 PM<br>2:15 PM | General                          | <p style="text-align: center;"><b><u>Breakout Session 8</u></b></p> <p style="text-align: center;"><b><u>AEP's Time Reporting Solution in Maximo</u></b></p> <p><b>Purpose:</b> Time Reporting can be complex and challenging to implement; however, Maximo's application framework is fully capable of supporting this functionality.</p>  | Christopher Greenlee<br>American Electric Power (AEP)       | The Incubator  |



|  |  |   |   |  |
|--|--|---|---|--|
|  |  | <p><b>Content:</b> We will discuss what requirements ultimately led us to build what we did in Maximo, the solution approach, what significant challenges we faced, how we were able to overcome them, and what lessons we learned through the process.</p>   |   |  |
| 1:00 PM<br>2:15 PM   | General  | <p align="center"><b>Breakout Session 9</b></p> <p align="center"><b>Capitalizing on Maximo Service Requests for Facilities</b></p> <p><b>Purpose:</b> The LCRA Facilities team made a strategic move to transition their Facilities Service Requests out of a web-based tool and into Maximo. This change enabled the team to leverage new-to-us Maximo functionality to streamline management of requests, utilize a single tool for Facilities work management and introduce Maximo to new users across the company. Along the way, the team incorporated best practices into the project approach, developing the solution and rolling out the change to our 1800+ employees.</p> <p><b>Content:</b> Come hear about our journey implementing Maximo Service Requests and utilizing the Maximo Service Desk.</p>  | Tassie Justice<br>LCRA  | The<br>Catalyst                        |
| 2:15 PM<br>2:45 PM   |  |  <p><b>Networking Afternoon Break Sponsored by</b> <b>STARBOARD CONSULTING</b></p> <p>An opportunity to network with your peers, share ideas and move to other breakout sessions</p>  |   | The Corral<br>&<br>Innovation<br>Foyer |
| <p><b><u>DAY 1 – Tuesday, April 18, 2023 (Afternoon Second Sessions)</u></b></p> |  |   |   |  |
| 2:45 PM<br>4:00 PM   | General  | <p align="center"><b>Breakout Session 10</b></p> <p align="center"><b>Maximo Governance is Required to Deploy Maximo Successfully</b></p> <p><b>Purpose:</b> Successful deployment of Maximo requires a governance plan to ensure oversight and road map planning for upgrades and enhancements.</p> <p><b>Content:</b> LCRA staff will demonstrate how their governance design improvements for their instance of Maximo improved collaboration across departments and increased visibility of upgrade and enhancement needs for budget planning.</p>  | Annie Wooten<br>&<br>Amanda<br>Huston<br>LCRA   | Moonlight                              |
| 2:45 PM<br>4:00 PM   | General<br>T&D<br>Water<br>Wastewater<br>Pipelines | <p align="center"><b>Breakout Session 11</b></p> <p align="center"><b>Maximo for Utilities T&amp;D and Maximo Spatial</b></p> <p><b>Purpose:</b> Review current capabilities and updates with Maximo for Utilities &amp; Spatial</p> <p><b>Content:</b> Asset management can be enhanced through Maximo for Utilities and Maximo Spatial with the integration of Maximo and GIS by providing an operational view of our assets based on current state/condition and overall health. Maximo's rich information about our assets can be visualized in ways that bring them to our attention, help us prioritize work by physical locations, understand how long problems have existed, and provide decision support. This session includes a live demo of Maximo Spatial built on Esri's ArcGIS server technology along with an overview of future functionality and use cases with open discussion.</p>                                  | João Souto<br>Maior<br>IBM<br>Vinicius<br>Garmatz<br>IBM<br>&<br>Thiago<br>Geraldi<br>IBM | Sunrise                                |
| 2:45 PM<br>4:00 PM   | General  | <p align="center"><b>Breakout Session 12</b></p> <p align="center"><b>Maximo Scheduler and Optimization</b></p> <p><b>Purpose:</b> IBM Maximo Scheduler enables planners and schedulers to graphically manage maintenance schedules on a Gantt chart. IBM Maximo Scheduler is an end-to-end work management tool for Maximo Asset Management that builds upon Maximo to enable users to manage large complex projects like shutdowns/turnarounds/outages, New Infrastructure Deployments, Refurbishments and Extensions and support dispatching and appointment scheduling.</p> <p><b>Content:</b> This session will provide an overview of both, Maximo Scheduler and Optimization. Attendees will learn how both these offerings can help streamline maintenance and service scheduling practices through a single system of record i.e. Maximo. Specific customer use cases can be discussed supported by product demonstration.</p> | Pedro Solfa<br>Spadacini<br>IBM   | The<br>Percolator                      |
| 2:45 PM<br>4:00 PM   | Mobility<br>(MUGM) /<br>Transportation             | <p align="center"><b>Breakout Session 13</b></p> <p align="center"><b>How AEP Solved the Challenges of Fleet Maintenance Scheduling</b></p> <p><b>Purpose:</b> Learn how mobile planning and self-scheduling solutions that simplify learning curves and leverage functionality are rewriting expectations for Maximo. With an intuitive mobile planning and scheduling solution, American Electric Power (AEP) is now able to efficiently schedule vehicle maintenance for 7,000 field operators across more than</p>  | Darcie<br>McGinnis  | Sunset                                 |

|                    |  |  |  |                      |
|--------------------|--|--|--|----------------------|
|                    |  | <p>90 different facilities. Learn how one of the utility industry's largest fleet operators solved these challenges with streamlined logistics and skyrocketing user satisfaction.</p> <p><b>Content:</b> This presentation will provide an understanding of the new landscape of mobile planning and scheduling tools for Maximo, including a full review of fleet specific challenges and opportunities, the "real-world" utility of available planning and scheduling options, and how to move from your organization from current state to your desired future state. Darci will be assisted by Jeffery Smith, InterPro Solutions</p>  | American Electric Power (AEP)                |                      |
| 2:45 PM<br>4:00 PM | Supply Chain (MSCUG)                               | <p align="center"><b>Breakout Session 14</b></p> <p align="center"><b><u>Eversource's Maximo Supply Chain Journey</u></b></p> <p><b>Purpose:</b> Learn about our implementation journey starting with the stories of product selection, some unique solutions we created, how we handled impact to operations (work management); project execution and production rollout considerations.</p> <p><b>Content:</b> We will delve into challenges we faced during journey and the benefits delivered by the program. Don't miss out if you are considering a Supply Chain Program implementation or even ongoing functional enhancements to your existing solution.</p>   | Jackie Zajac & Priska Kharel Eversource      | Twilight             |
| 2:45 PM<br>4:00 PM | General / All Utility Segments Management Managers | <p align="center"><b>Breakout Session 15</b></p> <p align="center"><b><u>Making the Business Case for Maintenance Technology</u></b></p> <p><b>Purpose:</b> With emerging technologies in Edge, Digital Twin, Asset Performance Management (APM) and AI/ML, how can your organization justify their business value and make the case for investment? What are the new measures and KPIs your organization should be tracking to reinforce the justification of these emerging technologies? Let's make the business case for 21st Century maintenance and reliability.</p> <p><b>Content:</b> We will go through the process to extrapolate the value opportunities afforded by the maintenance technology into financial value for maintenance technology utilization.</p>  | Tom Woginrich IBM                            | The Spark            |
| 2:45 PM<br>4:00 PM | General  | <p align="center"><b>Breakout Session 16</b></p> <p align="center"><b><u>Construction Contractor Use of Maximo</u></b></p> <p><b>Purpose:</b> Using the foundation of existing applications to provide a custom-tailored experience for construction contractors, preview various ways Maximo has been configured to provide access and ease of accessibility to users.</p> <p><b>Content:</b> Review of processes throughout Work Order Tracking, Service Requests, Inventory Usage and related security restrictions and technical configurations. Janie will be assisted by Lani Trotter, Starboard Consulting</p>  | Janie Mann CoServ                            | The Workshop         |
| 2:45 PM<br>4:00 PM | Information Technology                             | <p align="center"><b>Breakout Session 17</b></p> <p align="center"><b><u>How to Use Email Listener for Approval/Rejection with Workflow Assignments in Maximo</u></b></p> <p><b>Purpose:</b> The Maximo Email Listener provides the capability of requesting responses from users on transactional records such as Work Orders, Purchase Requests, Purchase Orders, and Invoices etc. for approvals/rejections without getting them logged into application. It is observed that the functionality is not widely appealing to Maximo community because response/actions are requested in form of a number that user has to write/type with response email, the response email can support only 2 actions, Approve / Reject, response emails error out during the processing due to additional characters, special characters, embedded signature from the end user response and the response email has a different character set, format when response is provided from outlook, iOS, or Android platforms.</p> <p><b>Content:</b> Learn how Vistra addressed the above challenges with additional customizations and are utilize the email listener efficiently to get response from end users without requiring them to log into the Maximo application.</p> | Arvind Solanki & Danny Hartgrove Vistra Corp | The Incubator        |
| 2:45 PM<br>4:00 PM | Manager / Management                               | <p align="center"><b>Breakout Session 18</b></p> <p align="center"><b><u>How to Guarantee a Successful Asset Management Program Using Maximo</u></b></p> <p><b>Purpose:</b> The largest challenge facing the successful use of Maximo is related to cultural factors which require management leadership and commitment.</p> <p><b>Content:</b> This session will discuss Management approaches and the need to build a plan and a formal project to change the business and culture to help guarantee a successful asset management program and Maximo implementation.</p>  | Clay Cook MUWG                               | The Catalyst         |
| 5:00 PM<br>8:30 PM |  | <p><b>Vendor Night</b></p> <p>Meet over 35 Maximo products and Services vendors and enjoy a full buffet and open bar<br/>Open bar starts at 5:00 PM and the dinner buffet opens at 5:30 PM</p>   |  | Terrell Hall I & III |

## Day 2 – Wednesday, April 19, 2023 (Morning)


| Time                 | Track         | EVENT/PRESENTATION   | Presenter  | Location           |
|----------------------|---------------|--|--|--------------------|
| 7:00 AM<br>8:00 AM   | All Attendees | <b>Continental Breakfast Sponsored by</b>    |  | The Porch          |
| 8:00 AM<br>8:15 AM   | General       | <u><b>MUWG Business Information</b></u><br><u>MUWG Chairman</u><br><u>MUWG Program Manager</u><br><u>IBM Maximo Management Committee Representative</u>  | George Perry MUWG MGNT. Committee NYPA<br>Clay Cook, MUWG Program Manager<br>Terry Saunders<br>IBM Maximo Liason | Starlight Ballroom |
| 8:15 AM<br>8:45 AM   | General       | <u><b>Presentation</b></u><br><br><u><b>Asset Management &amp; Work Management Basics &amp; Beyond</b></u><br><br>We are all reaching for the Brass Ring of "Maintenance on Condition". To Achieve the highest, most effective levels of Asset Management we must establish and maintain a solid foundation, everyone needs to understand the goals and the process toward effective and efficient asset management, together we can be "Asset Savvy" (NYPA), and it takes a Village of Maintenance, the Village of Engineering and the Village of Operations and Production. The Village People? Well Yes, All of Us. Let's explore the Journey and Foundation of Asset Management and how we build Asset Excellence, and from this foundation and consistent practice we can harvest Visual Inspection, the value of sensors, Asset Monitoring, Data Science and Machine Learning and begin to understand current asset health and detect anomalies which lead to asset degradation and eventual failure if we are unable to respond in time. Let's enjoy the ride to "Asset Savvy."<br>(NYPA) | Terry Saunders<br>IBM  | Starlight Ballroom |
| 8:45 AM<br>9:30 AM   | General       | <u><b>Presentation:</b></u><br><br><u><b>Mobility "Basics &amp; Beyond" - Panel with Audience input</b></u><br><br>Implementing Mobility ("Basics") and extending with advanced capability ("Beyond") is very challenging particularly at an enterprise scale. Battle tested panelists will share their stories - with audience interactive survey and input. Panel Members: Wayne Prejean (Kinder Morgan), Tom Press (APS), Adam Olson (Duke).  | Moderated by MUWG & MUGM<br>Panel: Kinder Morgan, Arizona Public Service, & Duke Energy                          | Starlight Ballroom |
| 9:30 AM<br>10:15 AM  | General       | <u><b>Presentation</b></u><br><br><u><b>Achieving your Sustainability Goals with Operational Data</b></u><br><br>Business today requires new levels of resilience and agility, rooted in responsible practices to preserve our planet. In this session, we will discuss how industry leaders are harnessing the power of technology to achieve their operating and sustainability goals. Learn how innovations in AI, automation, robotics, and edge computing are helping improve uptime, reduce costs, enhance safety, and optimize operations. Hear examples from industry leaders on how they are using data and AI to manage climate and environmental risk, optimize asset and resource performance, drive decarbonization and build more sustainable supply chains.   | Suzanne Livingston<br>IBM  | Starlight Ballroom |
| 10:15 AM<br>10:45 AM |               | <b>Morning Break Sponsored by</b> <br><br><b>An opportunity to network with your peers and share knowledge/experience</b>  |  | The Porch          |

**DAY 2 – Wednesday, April 19, 2023 (Morning Sessions)**

\*\*\*\* Grey shaded Breakout Session's indicate that Maximo will be demonstrated as part of the session \*\*\*\*

|                                   |                              |   |  |                   |
|-----------------------------------|------------------------------|---|--|-------------------|
| <b><u>Breakout Session 19</u></b> |                              |   |  |                   |
| 10:45 AM<br>12:00 PM              | Nuclear /<br>Generation / IT | <p align="center"><b><u>Incorporating Automated Assurance Testing in Regulated Industries</u></b></p> <p><b>Purpose:</b> As technology, and the pace of technology advancement increases, many regulated industries, such as the FDA, are reviewing guidance for Software Validation and Assurance Testing. Current recommendations and subsequent procedures are causing a lag in the implementation of software systems and new technologies. This lag is due to the lack of clarity, outdated compliance approaches, and perceived regulatory burdens. A newer approach is focused on <b>clarifying risk-based methodologies</b> to justify the amount and types of testing required.</p> <p><b>Content:</b> In this session, we will look at a Case Study on reducing the intensive manual testing requirements on Maximo Asset Management by utilizing automated testing processes. The focus will be on utilizing automation testing tools, reducing testing time and achieving a quicker implementation process for iFixes and other product releases. Utilizing automated testing tools will not only save time and money on software testing, but also allow Maximo users to take advantage of new technologies quicker, driving efficiencies and better quality in the business. The session will cover: How do you get your QA team on board? How do you integrate tools (ALM, Selenium, etc.)? The process of defining Risk Based applications. What does IBM provide to supplement the testing process? Can you survive and audit?</p> | Donna Grant<br>IBM   | Moonlight         |
| <b><u>Breakout Session 20</u></b> |                              |   |  |                   |
| 10:45 AM<br>12:00 PM              | General / T&D                | <p align="center"><b><u>Maximo Health &amp; Predict Utilities APM for Energy &amp; Utilities</u></b></p> <p><b>Purpose:</b> This session will explore the latest release and roadmap of Maximo Health &amp; Predict- Utilities providing decision support with demonstration and discussion of specific use cases.</p> <p><b>Content:</b> Maximo Health &amp; Predict Utilities is an application development environment for a utility to extend across the business and supports: Asset Performance Management; Asset Investment Planning; Predictive Maintenance; Situational Awareness. Come here how this solution is being deployed in Utilities and further developed to unlock business value.</p>  | John Douglas<br>IBM<br>&<br>Terry<br>Saunders<br>IBM   | Sunrise           |
| <b><u>Breakout Session 21</u></b> |                              |   |  |                   |
| 10:45 AM<br>12:00 PM              | General                      | <p align="center"><b><u>Foundations of Business Improvement Through Formal Process Documentation and Power BI</u></b></p> <p><b>Purpose:</b> Learn how CoServ utilizes Power BI and formal process documentation (using IBM Blueworks Live) to support continuous process improvement initiatives.</p> <p><b>Content:</b> Understanding the need to provide information beyond a technical perspective, CoServ has developed a variety of PowerBI reports and Dashboards that are consumed from end-user to Board of Directors. Combining this information with relevant process diagrams, we can better determine areas for process improvement and resource savings.</p>  | Ben Smith<br>CoServ  | The<br>Percolator |
| <b><u>Breakout Session 22</u></b> |                              |   |  |                   |
| 10:45 AM<br>12:00 PM              | Mobility<br>(MUGM)           | <p align="center"><b><u>How ConEdison is Deploying Maximo Mobile and Planning it's Upgrade to MAS</u></b></p> <p><b>Purpose:</b> Learn from ConEdison about their Maximo Mobile deployment in a very secured network environment leveraging different IT tools and exploring the different deployment options, authentication methods and configurability from the Maximo Mobile Configuration Tool to drive specific business needs from the ConEdison Steam Distribution area.</p> <p><b>Content:</b> This session will explore the different options that were made available to ConEdison for the deployment of Maximo Mobile and how the product seamlessly integrates to the state-of-the-art IT tools to give access to the end users in a highly secured environment. During this session we will go deep on the usage of Mobile Device</p>   | Kenneth<br>Genuard<br>ConEdison<br><br>João Souto<br>Maior<br>&<br>Vinicius<br>Garnmatz<br>IBM | Sunset            |


|                      |   |   |  |                  |
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|                      |   | Management (MDM) tools, Maximo Mobile supported authentication methods and API Management. This session also covers the future plans for Maximo Mobile in ConEdison and its upgrade path to the Maximo Application Suite (MAS)  |  |                  |
| 10:45 AM<br>12:00 PM | Supply Chain<br>(MSCUG)                   | <p style="text-align: center;"><b><u>Breakout Session 23</u></b></p> <p style="text-align: center;"><b><u>Invoice Entry in Maximo</u></b></p> <p><b><u>Purpose:</u></b> Gaining Efficiencies and Improving Accuracy of Invoice Entry in Maximo using a Maximo Based Tool with OCR Capabilities</p> <p><b><u>Content:</u></b> Oglethorpe Power Corporation utilizes Maximo to process all invoices related to plant purchases for materials and services. The invoice entry process was being done in Maximo by our shared service Accounts Payable Department. Due to resource constraints during and after Covid, increased invoice entry time became an issue. OPC Supply Chain implemented a tool that uploads scanned, photographed or PDF documents and expedites the creation of the invoice record within Maximo. The tool provides an Optical Character Recognition (OCR) &amp; an AI solution that simplifies the creation of invoice records in Maximo: it accurately interprets the data, enters it directly into the Invoice Module of Maximo and attaches the PDF document onto the Maximo record for processing. It also allows the user to view, validate, and adjust scanned data in a single screen. This implementation simplified invoice submittals (by vendors), processing procedures by invoice entry personnel and reduced entry time significantly.</p>                    | Cristy Bennett<br>Oglethorpe<br>Power<br>Corporation                           | Twilight         |
| 10:45 AM<br>12:00 PM | General /<br>T&D                          | <p style="text-align: center;"><b><u>Breakout Session 24</u></b></p> <p style="text-align: center;"><b><u>Maximo Spatial and ESRI's New Utility Network</u></b></p> <p><b><u>Purpose:</u></b> ESRI's new ArcGIS Utility Network (UN) represents a major re-architecture of how ArcGIS stores and manages Utility GIS data. There are several promising benefits to this new approach, such as better database and system performance, utility-specific GIS use cases, and the ability to store and traverse both Transmission and Distribution networks in a single database. So, what does UN mean for MUWG Utilities and your Maximo integrations to GIS? How do you sequence a big EAM project with your utility's planned UN upgrade, without disruption on your operations and integrations? How does Maximo work with the new UN model? Are there new capabilities for Maximo users to leverage?</p> <p><b><u>Content:</u></b> This presentation will dive into these questions. We'll discuss research working with UN and Maximo in the IBM Spatial labs as well as relate experiences from utilities in process. We'll also consider a potential alternative a few utilities have tried. You should leave this session with an understanding of UN to Maximo integrations, the questions to ask in preparing to take on UN to Maximo, and the benefits of leveraging UN for EAM needs.</p> | Thiago GERALDI<br>IBM<br><br>Jeremy Myers<br>High<br>Desert Spatial            | The Spark        |
| 10:45 AM<br>12:00 PM | MAS<br>Maximo 8                           | <p style="text-align: center;"><b><u>Breakout Session 25</u></b></p> <p style="text-align: center;"><b><u>MAS 8 Upgrade – The Journey, and Lessons Learned Thus Far</u></b></p> <p><b><u>Purpose:</u></b> Consolidated Edison Inc has partnered with Cohesive to upgrade their Maximo environments from 7.6.1 to MAS 8. Join the project team in this session as they share their journey thus far, and lessons learned along the way.</p> <p><b><u>Content:</u></b> IBM has integrated the latest version of Maximo with key monitoring, maintenance, and reliability applications to form the Maximo Application Suite (MAS). MAS is built on new infrastructure by utilizing Red Hat's containerization technology, OpenShift, which provides access to easy scalability and high availability. Con Edison started their MAS 8 upgrade journey in 2022, and the project team will be sharing their experience in this session, focusing on: Key Changes in MAS, Why did ConEd decide to switch to MAS, Challenges faced along the way and lessons learned and Change Management with respect to MAS. Alecia and Apexa will be assisted by Trish Gosch, Rachita Bhatia and Bennet Tan from Cohesive</p>   | Alecia<br>Copeland-<br>Barrett<br>&<br>Apexa<br>Dave<br>Consolidated<br>Edison | The<br>Workshop  |
| 10:45 AM<br>12:00 PM | IT / Water /<br>Wastewater /<br>Pipelines | <p style="text-align: center;"><b><u>Breakout Session 26</u></b></p> <p style="text-align: center;"><b><u>Streamlining Operations at Mount Pleasant Waterworks: How a Productized Integration Solution Improved Workflow and Reduced Costs</u></b></p> <p><b><u>Purpose:</u></b> Mount Pleasant Waterworks (MPW) knows the importance of integrating Maximo, GIS, Inventory, and CIS data from siloed systems – their workflow wouldn't be possible without it. They also understand that custom integrations can be expensive and resource intensive, so they chose a different path.</p> <p><b><u>Content:</u></b> Join MPW to learn how they are using a productized integration solution to track changes made to their infrastructure in IBM Maximo and ArcGIS, manage finance and inventory transactions from Microsoft Dynamics, and more – all while saving time, reducing costs, and increasing data integrity. Shawn will be assisted by Lindsay Sutherland-Gvakharia, Geonexus</p>   | Shawn Miller<br>Mount<br>Pleasant<br>Waterworks<br>(MPW)                       | The<br>Incubator |
| 10:45 AM<br>12:00 PM | General                                   | <p style="text-align: center;"><b><u>Breakout Session 27</u></b></p> <p style="text-align: center;"><b><u>Maximo Visual Inspection (Visual Asset Inspection)</u></b></p> <p><b><u>Purpose:</u></b> Automate your visual inspections at scale. Learn how to utilize Maximo Visual Inspection to help automate visual inspections of your assets, including large infrastructures and assets in hard-to-reach areas.</p> <p><b><u>Content:</u></b> Maximo Visual Inspection allows subject matter experts to easily create AI vision models for their use case with its point and click software. Learn how MVI has been used for inspections across industries with cameras, mobile</p>  | Taylor Luong<br>IBM  | The Catalyst     |

|                     |               |  |  |                 |
|---------------------|---------------|--|--|-----------------|
|                     |               | devices and drones to catch and prevent failures, reduce manual inspections, and improve production efficiency. See how MVI can also be utilized with Maximo Mobile and Maximo Monitor to send alerts and create work orders from these inspections.                             |  |                 |
| 12:00 PM<br>1:00 PM | All attendees | <br><b>Networking Lunch Sponsored by</b><br><b>A plated lunch to promote discussion by interest group: Power Gen, T&amp;D, Supply Chain, Water &amp; Waste Water, IT, Fleet and Management</b> |  | Terrell Hall II |

## DAY 2 – Wednesday, April 19, 2023 (Afternoon First Sessions)

|                    |  |  |  |                   |
|--------------------|--|--|--|-------------------|
| 1:00 PM<br>2:15 PM | General                                | <p style="text-align: center;"><u>Breakout Session 28</u></p> <p style="text-align: center;"><b>Maximo Monitor (Enterprise Monitoring at Scale)</b></p> <p><b>Purpose:</b> How can we get alerts from assets that need attention fast? Learn how the data from SCADA systems, and sensors can be leveraged to provide us actionable alerts.</p> <p><b>Content:</b> Maximo Monitor is being deployed across industries to identify anomalies and provide alerts to understand when equipment requires attention. Learn how to use an asset hierarchy and streaming analytics to find anomalies fast and generate actionable alerts.</p>   | Mike Lamb<br>IBM<br><br>Greg Tanck<br>Black & Veatch                                   | Moonlight         |
| 1:00 PM<br>2:15 PM | T & D                                  | <p style="text-align: center;"><u>Breakout Session 29</u></p> <p style="text-align: center;"><b>Maximo Continuous Improvement: Moving from Implementation to Enhancement</b></p> <p><b>Purpose:</b> Eversource's electric business went live with Maximo Work Management approximately two years ago. Since that time we have moved from having to get users to buy into to a new system and set of processes to working with them to identify a series of enhancements to simplify the work order lifecycle and reduce manual effort.</p> <p><b>Content:</b> This presentation will discuss steps taken to move users from skeptics to champions and also highlight some of the enhancements made to showcase the potential of Maximo, including; Automated CUE Asbuilts, creating prerequisites from CU Estimates and enhanced Start Center filtering based on User Profile.</p>   | Kevin Rogerson<br>Eversource   | Sunrise           |
| 1:00 PM<br>2:15 PM | General /<br>Information<br>Technology | <p style="text-align: center;"><u>Breakout Session 30</u></p> <p style="text-align: center;"><b>Maximo Screens Can Be Awesome! – Maximo Application Designer Basics &amp; More</b></p> <p><b>Purpose:</b> Inspire attendees to leverage application designer and conditional user interface capabilities to support their Maximo-enabled business processes.</p> <p><b>Content:</b> During this session, we will explore the Maximo Application Designer and its capabilities. You will learn what the designer is, what it can do, and how to leverage its capabilities to refine and configure Maximo screens to meet YOUR business needs. The session will include Maximo demonstrations of screen creation, editing, and configuration including conditional UI rules.</p>   | Jade Warren<br>Great River<br>Energy   | The<br>Percolator |
| 1:00 PM<br>2:15 PM | Mobility<br>(MUGM) / MAS<br>Maximo 8   | <p style="text-align: center;"><u>Breakout Session 31</u></p> <p style="text-align: center;"><b>Using Maximo Mobile and GIS to Simplify Your Field Service Operations</b></p> <p><b>Purpose:</b> Imagine the following scenario: You are trying to send information about a work location to a field technician. You take a screenshot of a map and mark it by pointing out important areas where a particular service needs to be done. This is a quick way to communicate, but because these annotations on the map are not saved, they will end up being lost in the various messages you receive per day. What if someone leaves the company? How will you retrieve this message with your instructions or precious information? How we collect and share information should be efficient, easy, and accessible. Fortunately, Maximo with each new release has been innovating and improving the ways and possibilities of field services operations to become more GIS-centric and provide online and offline access to maps in the field to reduce errors and save time by increasing team efficiency.</p> | Thiago Geraldi<br>IBM<br><br>Vinicius Garmatz<br>IBM<br><br>João Souto<br>Maior<br>IBM | Sunset            |

|                    |                         |   |  |               |
|--------------------|-------------------------|---|--|---------------|
|                    |                         | <p><b>Content:</b> Come to this session to learn more about the latest released innovations and roadmap for Mobile and GIS in MAS. Besides the product updates, a collaborative demo is planned for this session. Join us!</p>  |  |               |
| 1:00 PM<br>2:15 PM | Supply Chain<br>(MSCUG) | <p align="center"><b>Breakout Session 32</b><br/><b>Maximo Supply Chain Update</b></p> <p><b>Purpose:</b> IBM lead session which provides supply chain user community with Maximo product updates in the supply chain areas (Inventory, Contracts, Purchasing and Invoicing). Validate strategic direction, priorities on enhancements requests and review the RFE Request for Enhancements process to ensure we are bringing the right set of new supply chain features.</p> <p><b>Content:</b> 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. We will also dedicate time to point our community members to the current list of RFE and explain how they can help prioritize those requests and submit their own for evaluation.</p>   | Thomas Knowles<br>IBM                        | Twilight      |
| 1:00 PM<br>2:15 PM | General                 | <p align="center"><b>Breakout Session 33</b><br/><b>What Do You Do While Waiting for Your IBM Maximo Re-implementation?</b></p> <p><b>Purpose:</b> Continue to follow the U.S. Bureau of Reclamation on our journey. Last spring, we spoke about the development of our Maximo strategy and how we used that strategy to develop a re-implementation plan for our current 25 site, 1100 user Maximo system. Now that plan is getting ready to turn into a project with a consultant company leading it, but we are a government entity, so sometimes things get started slowly. Hear about what Reclamation is doing in our current Maximo system while we wait for the re-implementation project to really get going.</p> <p><b>Content:</b> This presentation will show the many initiatives Reclamation's Maximo team has been doing to prepare our users for this upcoming project. From implementing business rules to help them understand what data governance means to closing down unused storerooms, training on out-of-the-box functionality, and more. We will show some examples in our Maximo system and show the IBM token-based eLearning training classes we have been using to get familiar with the new Maximo Application Suite 8.x look and feel.</p>  | Anne Antonelli<br>U.S. Bureau of Reclamation | The Spark     |
| 1:00 PM<br>2:15 PM | General                 | <p align="center"><b>Breakout Session 34</b><br/><b>Maximo and Envizi - Powerful Alone, Better Together</b></p> <p><b>Purpose:</b> For years, utilities have been balancing the cost of maintenance with the risk of production performance, safety, and compliance. Now, in addition to optimizing maintenance and performance, utilities must also balance waste and emissions. Maintenance cannot continue to be thought of as just another expense. Strategic maintenance is becoming an investment to extend asset utilization, and to also ensure peak performance with minimal emissions. Traditionally Maximo has been used by utilities to manage assets, work and resources. This data is often isolated to the maintenance and operations organizations, and not readily available when compiling comprehensive Environmental, Social and Governance (ESG) reporting. Last March, the Securities and Exchange Commission (SEC) announced new ESG disclosure requirements for all public companies. Under these new rules, companies must enhance and standardize climate-related disclosures, including climate risk, such as the impact of severe weather events and the governance of risk management processes.</p> <p><b>Content:</b> Within this session, we will explore the Envizi solution and show the power of integrating this ESG reporting solution with Maximo. Maximo, along with Envizi, can play a key role in facilitating meeting the SEC requirements, and also highlight business processes that can improve a utility's environmental impact. Envizi is a comprehensive sustainability solution that establishes a data foundation from enterprise data resources, such as Maximo, and provides accelerated greenhouse gas (GHG) calculations with flexible reporting tools. Envizi with Maximo enables organizations to manage environmental goals, identify efficiency opportunities, and assess sustainability risks.</p> | Donna Grant &<br>Mumtaz Mesania<br>IBM       | The Workshop  |
| 1:00 PM<br>2:15 PM | General                 | <p align="center"><b>Breakout Session 35</b><br/><b>Optimizing Maximo Using Asset Criticality Rankings</b></p> <p><b>Purpose:</b> Asset criticality rankings are a crucial component of any asset-intensive organization, enabling effective work prioritization and data-driven decision-making.</p> <p><b>Content:</b> A comparative analysis of two different approaches to asset criticality rankings will be presented, which includes highlighting the benefits and drawbacks of each. With an emphasis on optimizing the use of IBM Maximo, the presenters will explore strategies for integrating criticality rankings into the platform, as well as best practices for managing and utilizing this important data. Attendees will gain valuable insights into the complexities of asset criticality ranking and learn practical techniques for improving their own organization's processes. John will be assisted by Russ Mokrouz, GenesisSolutions</p>   | John Rice<br>Trinity River Authority         | The Incubator |

|  |   |  |   |  |
|--|---|--|---|--|
| 1:00 PM<br>2:15 PM   | Generation /<br>Water /<br>/ Wastewater               | <p align="center"><b><u>Breakout Session 36</u></b></p> <p align="center"><b><u>Utilizing Maximo for Data Capture / Condition Assessments to Support Asset Management at Chelan County PUD</u></b></p> <p><b>Purpose:</b> Chelan started down the path of promoting ISO 55000 standards for Asset Management (AM), and by 2018 had developed unique tools in Maximo to support that effort. Although we had been doing AM for decades, the modern definition of AM is aimed at optimizing COST, RISK, and PERFORMANCE together. A PUD evolution in AM was required. Asset Managers now use Maximo to provide data, processes, tools, and competencies for collective and optimized data driven decision making, information gathering, and knowledge.</p> <p><b>Content:</b> Description, Todd will be assisted by Ray Hahne, Total Resource Management</p>  | Todd Walsh<br>Chelan County<br>Public Utility<br>District | The<br>Catalyst                        |
| 2:15 PM<br>2:45 PM   |   | <p align="center"> <br/> <b>Networking Afternoon Break Sponsored by</b><br/>           An opportunity to network with your peers, share ideas and move to other breakout sessions         </p>   |   | The Corral<br>&<br>Innovation<br>Foyer |
| <p><b><u>DAY 2 – Wednesday, April 19, 2023 (Afternoon Second Sessions)</u></b></p> |   |  |   |  |
| 2:45 PM<br>4:00 PM   | General / Water<br>/ Wastewater                       | <p align="center"><b><u>Breakout Session 37</u></b></p> <p align="center"><b><u>Using Maximo Service Requests to Manage and Track Customer Issues or Requests</u></b></p> <p><b>Purpose:</b> Mount Pleasant Waterworks will present an overview of how we are using Maximo Service Requests to manage and track customer requests and complaints which are dispatched to our field crews for investigation and follow-up.</p> <p><b>Content:</b> Elements to be covered include MPW's custom set of Problem Codes and Resolution Codes; how overdue calls, 2<sup>nd</sup> calls, and after-hours calls are identified and handled; how activities which need to result in a billable charge to the customer are identified; how Work Logs are leveraged to document investigation, resolution, and follow-up; and how all of this is summarized and reported to our senior Management Team.</p>  | Mel Bennett<br>Mount Pleasant<br>Waterworks               | Moonlight                              |
| 2:45 PM<br>4:00 PM   | T & D   | <p align="center"><b><u>Breakout Session 38</u></b></p> <p align="center"><b><u>Linking ERMAP/Tool and Maximo for Emergent Restorations (Eliminating Manual Processes)</u></b></p> <p><b>Purpose:</b> A newly developed software solution, linking ERMAP/Tool and Maximo EAM System. As part of this solution, Operations can use the ESRI Web Map Application for Emergent restoration, both after a storm and on a day-to-day basis.</p> <p><b>Content:</b> In this session, we will cover the Emergent Restoration Process. The solution architecture, its implementation, demo, and business benefits.</p>   | Paul Burghart<br>Evergry<br>&<br>Sanjay Patil<br>IBM      | Sunrise                                |
| 2:45 PM<br>4:00 PM   | General /<br>Training /<br>IT and Maximo<br>Migration | <p align="center"><b><u>Breakout Session 39</u></b></p> <p align="center"><b><u>Hints and Tips On Moving to Maximo Application Suite. Lessons learned by the IBM SRE Team</u></b></p> <p><b>Purpose:</b> Since early 2021, the IBM Maximo Application Suite Dedicated offering has been migrating / upgrading clients from the existing Maximo EAM application to Maximo Application Suite.</p> <p><b>Content:</b> This presentation will discuss some of the lessons learned about the migration and upgrade process. Key elements involved in the planning, important questions to answer, the pre-conditions needed and the upgrade journey itself will be covered. Depending on the choices a client makes, there may be some items to be aware of early to avoid complications later during the upgrade. Every client's journey is as unique as their implementation, but there are common themes regardless of where you currently are and the choices made to move to the Maximo Application Suite.</p> | Gurmeet Arora<br>IBM                                      | The<br>Percolator                      |



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| <p>2:45 PM<br/>4:00 PM</p> | <p>Mobility (MUGM) &amp; Supply Chain (MSCUG) Combined Session</p> | <p align="center"><b><u>Breakout Session 40</u></b></p> <p align="center"><b><u>APS's Mobility Application RFP Process and Strategy</u></b></p> <p><b>Purpose:</b> APS is Arizona's largest and longest serving electric utility, providing power for nearly 2.7 million customers in 11 of the state's 15 counties. Our company is endeavoring to transform and align our Work and Asset Management capabilities, Accounting and Finance cost traceability, and Supply Chain optimization across APS's enterprise for Facilities, Generation, and Transmission &amp; Distribution. To achieve our company's goal of improved reliability and customer affordability we united three projects with common goals; Price to Reliability (P2R), Supply Chain Optimization (SCO) and PowerPlan Transformation (PAX) under Supply Chain Optimization and Reliability Efficiency, also known as the S.C.O.R.E. program. Mobile capability, integrated with Maximo, is a foundational enterprise initiative, and is part of APS's Connected Worker Program and the S.C.O.R.E Program.</p> <p><b>Content:</b> This presentation goes into detail on our RFP process, strategy, and vetting of potential candidates to deliver our new mobile capabilities for work and asset management. To this point in time, APS has not had a fully integrated mobile solution with Maximo. Attendees of MUWG and this presentation will get detailed insight to our approach, best practices, lessons learned, and ultimately, our journey with SEW – Smart Energy Water and our new solution SMW – Smart Mobile Workforce.</p> | <p>Tom Press<br/>Arizona Public Service (APS)</p>         | <p>Starlight Ballroom</p> |
| <p>2:45 PM<br/>4:00 PM</p> | <p>General</p>   | <p align="center"><b><u>Breakout Session 41</u></b></p> <p align="center"><b><u>Optimize Asset Management with Process Mining for Maximo</u></b></p> <p><b>Purpose:</b> Intelligent automation is the cornerstone of any digital transformation. Often utilities are seeking ways to reduce manual labor, increase operational efficiency and improve process execution. However, process bottlenecks are not easy to identify, and aren't easy to remedy without understanding the root cause. Process variations, reworks and manual work tasks are difficult to monitor. Without a clear understanding of how the process works, utilities are unable to identify how best to apply automation that delivers an ROI. If you are concerned about organizational risk associated with non-conformant, non-compliant, inefficient process execution and wish to create more resiliency in asset operations, this education session is for you.</p> <p><b>Content:</b> Attendees will learn about industry leading insight into how utilities are using AI to identify non-compliant, non-conformant and process variations that reduce organization efficiency, increase operational expense and risk. A special emphasis and demonstration will focus on applying process mining to Maximo.</p>   | <p>Chris Thomas<br/>IBM</p>                               | <p>Twilight</p>           |
| <p>2:45 PM<br/>4:00 PM</p> | <p>General</p>   | <p align="center"><b><u>Breakout Session 42</u></b></p> <p align="center"><b><u>Maximo Instance Consolidation at Vistra Corp</u></b></p> <p><b>Purpose:</b> Vistra previously maintained a 5.x version of Maximo in an instance strictly for the Comanche Peak Nuclear Power Plant. A second, up to date instance of Maximo was maintained for the remainder of the company, including corporate, retail, and fossil generation entities. In preparing for the upgrade of the nuclear instance, it was determined to move to a single Maximo instance to support all required Vistra functions.</p> <p><b>Content:</b> This presentation will focus on the evaluation process used to make the determination to move to a single Maximo instance.</p>  | <p>Danny Hartgrove &amp; Terry Coots<br/>Vistra Corp.</p> | <p>The Spark</p>          |
| <p>2:45 PM<br/>4:00 PM</p> | <p>General</p>   | <p align="center"><b><u>Breakout Session 43</u></b></p> <p align="center"><b><u>Automated Contractor Time and Expense Processing and Payment Solution</u></b></p> <p><b>Purpose:</b> Eversource has implemented an automated process of processing the field work information entered on iPads by contractors to generate a Contractor Time &amp; Expense (CTE) record in Maximo, which is automatically routed to the contractor back-office for review. Once contractor confirms the work and charges, the CTE record comes to the field supervisors and managers for their approvals. This in turn generates an automated pre-approved invoice reducing cycle time, manual overheads and paperwork and leading to faster payment processing for contractors.</p> <p><b>Content:</b> Learn how we did this, what it takes to do it, what were the challenges and what are the benefits of it.....and some numbers. Kevin will be assisted by Ganesh Murai, Infosys</p>   | <p>Kevin Rogerson<br/>Eversource</p>                      | <p>The Workshop</p>       |
| <p>2:45 PM<br/>4:00 PM</p> | <p>General</p>   | <p align="center"><b><u>Breakout Session 44</u></b></p> <p align="center"><b><u>Simplifying Data Updates Using Maximo Application Import/Export</u></b></p> <p><b>Purpose:</b> Maximo Application Import/Export allows users to quickly update large amounts of data in a variety of Maximo modules creating a streamlined data integrity end point. Application Import/Export is a powerful tool available for bulk loads needed in a short amount of time.</p> <p><b>Content:</b> This session will provide an overview of how Maximo Application Import/Export works and the advantages of using the tool, its functionality and how to avoid pitfalls. Attendees will learn how the tool can streamline user data uploads increasing accuracy and integrity within a variety of Maximo modules. By utilizing this improved process, LCRA has been able to save resource hours and improve data quality while also allowing SMEs to have better insight and control over data updates.</p>  | <p>Annie Wooten &amp; Sue Brashar<br/>LCRA</p>            | <p>The Incubator</p>      |

| <b>Breakout Session 45</b> |                 |   |                     |                       |
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| 2:45 PM<br>4:00 PM         | MAS<br>Maximo 8 | <p style="text-align: center;"><b><u>Using the New Role-Based Work Order, Workflow and Dashboard Apps in Maximo 8</u></b></p> <p><b>Purpose:</b> This session explores how to take advantage of the new applications delivered in Maximo 8 under the Maintenance Manager project.</p> <p><b>Content:</b> 3 new applications will be demonstrated which were built in the Graphite user interface on top of Maximo's object structure api's to bring a new look to familiar business processes. Work Orders and Workflow are role-based applications available in the main menu that bring common functions into a configurable list view with summary/detail pages. The Operational Dashboard is a top-level app like the Start Center, where KPI's - along with a roadmap of configurable components - will be built and delivered over several MAS/Manage releases.</p> | Jordan Smith<br>IBM | The<br>Catalyst       |
| 4:00 PM<br>4:10 PM         |                 | <p><b><u>FILL OUT YOUR CONFERENCE EVALUATION IN GUIDEBOOK &amp; MAKE YOUR WAY TO THE STARLIGHT BALLROOM for our Door Prize Drawing</u></b></p>  |                     |                       |
| 4:10 PM<br>4:30 PM         |                 | <p><b><u>CLOSING REMARKS – DOOR PRIZES</u></b></p>  |                     | Starlight<br>Ballroom |