



ORLANDO INTERNATIONAL AIRPORT

*The Orlando Experience*<sup>®</sup>

# Welcome to the Maximo UC

Pete Pelletier

Vice President Information Technology

# Who Are We?

- A community gateway
- A “First and Last Impression”
- A Sense of Place
- An economic resource
- A global connector
- World Class Airport



# Who Are We?: By The Numbers

- The busiest airport in Florida with 52 million passengers (rolling 12-months ending in March '23)
- 4<sup>th</sup> largest U.S. airport in landmass (11,605 acres)
- World's largest rental car market
- A central access point for promoting growth to the region's multi-modal transportation options



# Air Service

## CY 2022 Passenger Traffic Total

Traffic Category	Passengers	% Change over CY '21
Domestic Passengers	44,635,331	16.2
International Passengers	5,543,168	184.2
<b>Total Passengers</b>	<b>50,178,449</b>	<b>24.4</b>

*Based on the data we have, we could be at 55 million by the end of CY 2023*



# Airport Economic Activity: Comparison of Florida's Large Hubs

Airport	Jobs	Payroll	Value Added	Economic Impact
MCO	309,918	13.0B	23.0B	41.4B
MIA	221,966	11.2B	19.8B	35.3B
FLL	110,047	5.0B	8.8B	15.4B
TPA	82,136	3.7B	6.3B	11.3B

FDOT 2022 Study

**What can we look forward to in the future?**

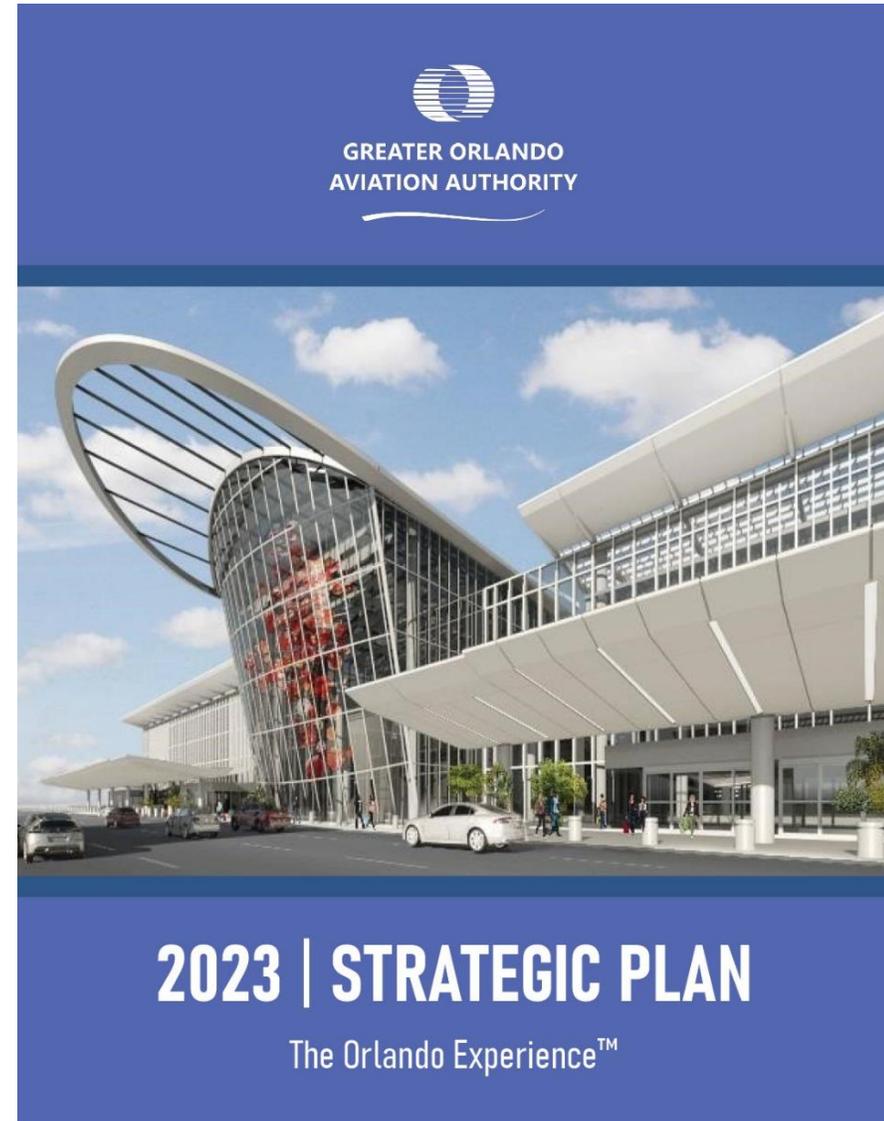


# Phase 1 Expansion and Pedestrian Bridge



# Strategic Plan (Future)

- Business development
  - Cargo activity
  - Air service to underserved areas around the world
- Employment and retention
- Continuous improvement based on customer feedback
- Cohesive messaging with our partners including Orlando Economic Partnership, Visit Orlando and others
- Multi-Modal Hub capabilities
- Partnership opportunities
- More coming



# Brightline – Coming in 2023

- Brightline – The only intercity rail service in the US from an airport
- Will operate from MCO to city centers in West Palm Beach, Ft. Lauderdale, and Miami
- Additional stops in Boca Raton & Aventura



# Vision

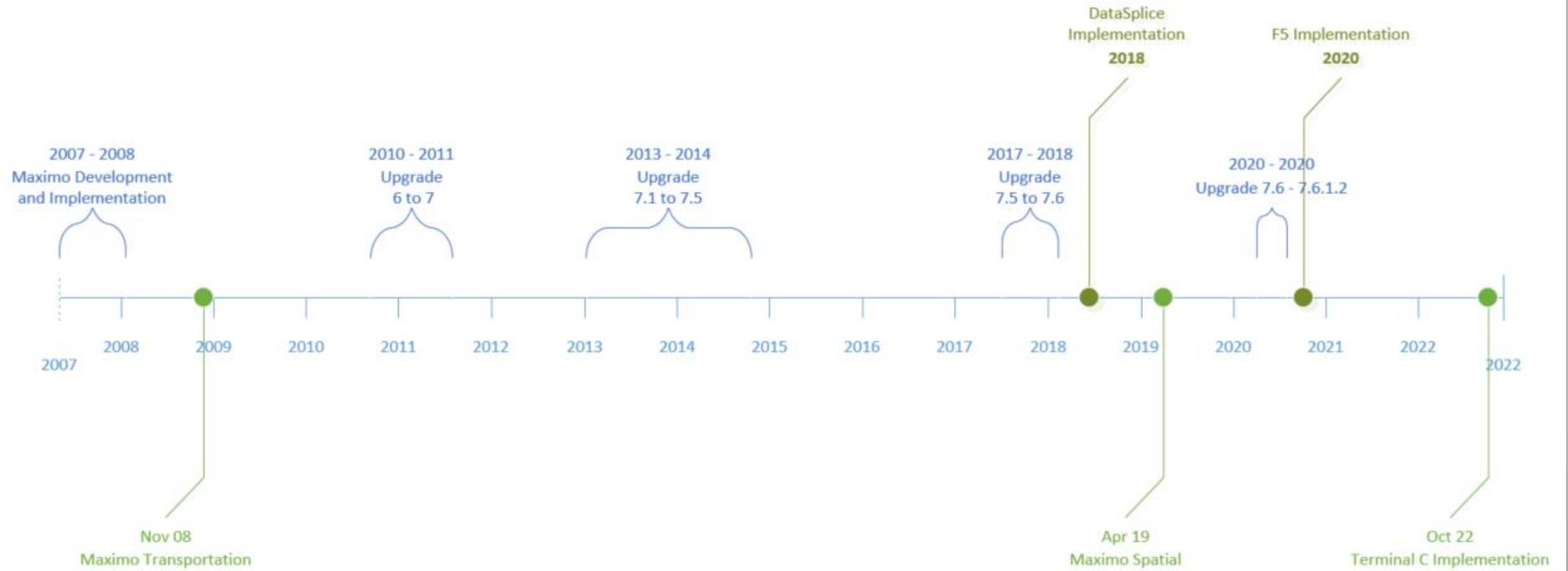
- Achieve the mobility needs of the region. Beyond aviation, beyond automotive, including rail and other modes.
- Get the entire community engaged.



# Our Maximo History



# History timeline



# Current Maximo Deployment

- **Sites**

- OIA (Orlando International Facility)
- FLEET (Vehicle Maintenance)
- NTCPBB (North Terminal Passenger Boarding Bridges)
- STCPBB (South Terminal Passenger Boarding Bridges)
- NTCBHS (North Terminal Baggage Handling)
- STCBHS (South Terminal Baggage Handling)

- **Users**

- 760 active Users
- 360 mobile Users

- **Status**

- Average Work Completion 12000 Work Order per month
- 17536 Operating Locations
- 47444 Operating Assets

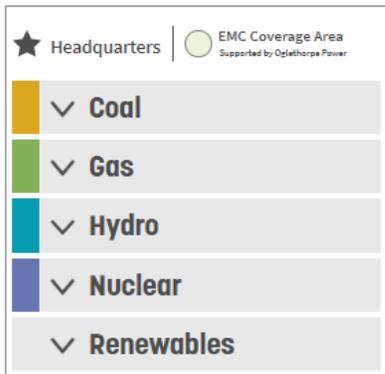
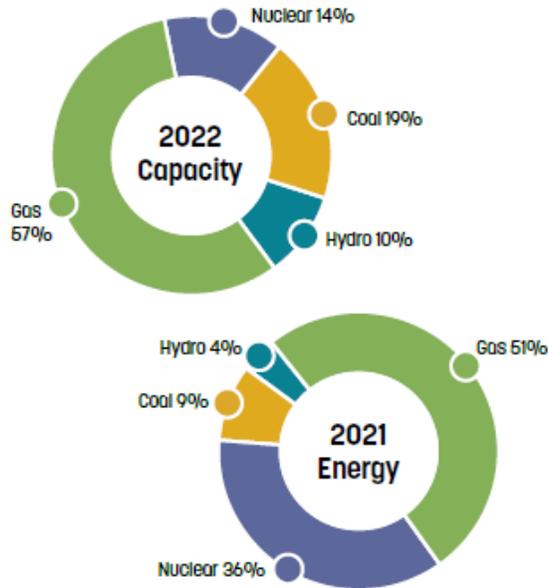


# Oglethorpe Power Corporation E-Sourcing Initiative



# Oglethorpe Power Corporation

## GENERATING FACILITIES



- ▶ Oglethorpe Power is one of the nation's largest power supply cooperatives with approximately \$16 billion in assets serving 38 Electric Membership Corporations which, collectively, provide electricity to approximately 4.4 million Georgia residents.
- ▶ Its diverse energy portfolio includes natural gas, nuclear, hydroelectric and coal generating plants with a combined capacity of more than 7,800 MW. Oglethorpe Power was established in 1974 and is owned by its 38 Member Systems.
- ▶ Its headquarters are in Tucker, Georgia, an Atlanta suburb.

# Oglethorpe Power Corporation

## Maximo: Single Organization - Multi-Site (13) - ~275 Users



OPC Headquarters



Thomas A. Smith Energy Facility



Bobby C Smith Energy Facility



Chattahoochee Energy Facility



Rocky Mountain Hydroelectric Plant



Doyle Energy Facility



Hawk Road Energy Facility



Hartwell Energy Facility



Baconton Power



Sewell Creek Energy Facility



Smarr Energy Facility



Talbot Energy Facility



Washington County Power

# Business Application Usage On Maximo 7.6.1.2

\* Workflow-Enabled

\*\*Add-On Product

\*\*\* In Progress

MODULE	APPLICATION
Administration	Calendars, Resources, Classifications, <b>Interloc Solutions Informer**</b> , <b>Interloc Solutions Mailer**</b>
Assets	Assets, Locations, Failure Codes, <b>TK Pro**</b>
Contracts	Terms and Conditions, <b>Master Contracts*</b> , <b>Purchase Contracts*</b>
Financial	Chart of Accounts
Inventory	Inventory, Inventory Usage, <b>Bin Master**</b> , Shipment Receiving, Condition Codes, <b>Item Master*</b> , Service Items, Storerooms
Planning	<b>Job Plans*</b> , Routes, <b>IBM Scheduler**</b> , <b>IBM Calibration**</b>
Preventive Maintenance	Preventive Maintenance
Purchasing	<b>Company Master*</b> , <b>Companies*</b> , <b>Insurance**</b> , <b>ISN**</b> , <b>Purchase Requisitions*</b> , <b>Request for Quotations*</b> , <b>Purchase Orders*</b> , <b>Receiving*</b> , <b>Invoices*</b> , <b>Visa and Expense Reporting**</b> , <b>Knowledge Lake Bot**</b>
Resources	Crafts, Labor, People, Person Groups
Self Service/Service Desk	Desktop Requisition, <b>Plant Access*</b> , <b>Maximo Service Requests*</b> , <b>Facility Service Requests*</b>
HSE Module	<b>Safety Events*</b> , <b>Environmental Incident Reporting*</b> , <b>Capital Scoping Projects*</b> , <b>MOC***</b>
Work Orders	Labor Reporting, <b>Quick Reporting*</b> , <b>Work Order Tracking*</b> , <b>Work Request*</b>
E-Mail Listeners	Receipts, Contracts, work orders, service requests

## Not our first attempt...

- ▶ In 2012, went to market searching for E-Sourcing Tool
  - RFP
  - Analysis
  - Recommendation
- ▶ Market Changed
- ▶ Put Award on hold
- ▶ 9 years later.....

# Why did OPC need an E-Sourcing Tool?

## OPC NEEDED...

- A tool that was more than getting a faxed/emailed quote
- A solution that provided integration and transparency with Maximo
- A secure bidding tool for both open and sealed bids
- A tool that could handle single quotes and LARGE bids
- A simple tool to use
- A tool that provided audit capabilities
- A tool that was ZERO cost to our vendors

## RFP for E-Sourcing Tool

- ▶ Formed E-Sourcing team (IT, Maximo BSA, Supply Chain)
- ▶ Utilized some of previous RFP requirements
- ▶ Identified vendors
- ▶ Prepared Documents
  - Submit to select group of vendors
  - Invite vendors to conduct product demos, Q&A session(s)
  - Interview client reference checks
- ▶ Compiled advantages/disadvantages
- ▶ Produced cost estimate
- ▶ Recommended vendor
- ▶ Obtain approval from stakeholders & awarded to **P2Insight**

# P2Insight

## Maximo E-Commerce Enabler

- ▶ **A Maximo business partner focusing exclusively on Supply Chain E-Commerce Enablement of Maximo.**
- ▶ **Maximo veterans helping customers get the most from their investment in Maximo by:**
  - Helping requesters find the parts and services they need
  - Helping them quickly source and order the parts and services
  - Helping procurement to source the items required quickly, get price quotes, place orders, and manage the delivery of the orders.
  - Integrate asset managers with their suppliers and vendors so that they get:
    - Visibility
    - With Visibility, you get Control
    - With Visibility and Control, you can manage and automate
    - And with all three, you get productivity, efficiency and **reliability!**
  - Make the demand to fulfillment as efficient and fast as possible!

# P2Insight delivers visibility into Purchase Requests and Orders...

- ▶ Deliver this through three components:
  - cXML Integration Framework and Adapters for integration with advanced vendors
  - Order Hub Procurement Portal for interaction with less advanced vendors
  - Maximo enhancements and process improvements
  - New User Interfaces to Maximo Applications

# Example of a Replacement User Interface

EzReq

Max Admin

### Catalog Item: 1011

Manufacturer / Model : RIDGID / R9600

×

*RIDGID 18-Volt X4 Hyper Lithium Ion Drill Driver and Impact Driver 2-Pieces Combo Kit*



RIDGID 18-Volt X4 Hyper Lithium Ion Drill Driver and Impact Driver 2-Pieces Combo Kit The new Ridgid 18-Volt Drill and Impact Driver Combo is a must have combo kit at an incredible price. The 18-Volt Compact Drill and Impact Driver has best-in-class torque for the most demanding applications. Both tools have exclusive Grip Light Technology which engages LED light by simply holding the tool and innovative Hex Grip for maximum comfort to make every job easier. Powered by Hyper Lithium Technology, an innovative battery technology built for high performance. Backed with the Ridgid Lifetime Service Agreement. Free Batteries. Free Parts. Free Service. For Life.

**Sourcing:**

**Purchase**

Home Depot

- Catalog #: 208787
- Mfg / Model : RIDGID / R9600

**Punchout**

- Price: \$179.00 per EA
- Validity: Actual Price
- Price Date: 04/03/2023
- Price Origin: Punchout

Requested Delivery Date \*  
04 / 04 / 2023

Charging Key

Requester Remarks

Quantity  
-      1 +      / EA

Line Total:    \$179.00

[Update Sourcing](#)

[Update](#)

# Why P2Insight's Order Hub?

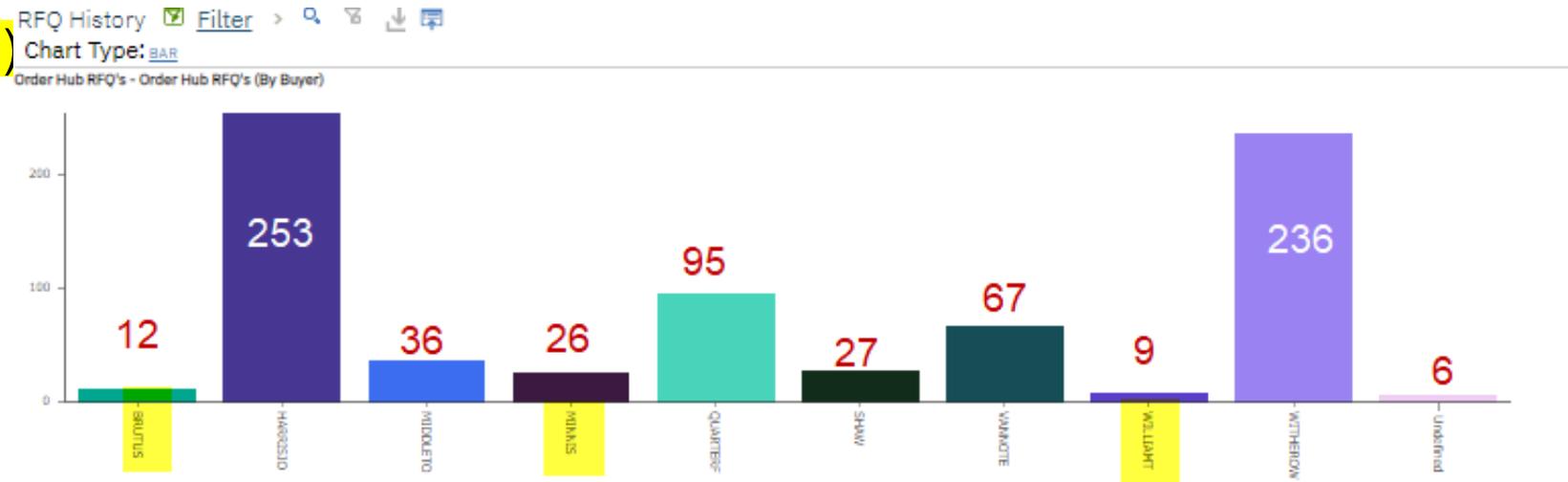
- Solution configurable to OPC's needs.
  - Work Flow
  - PR Re-approvals after bids
- Solution utilizes the functionality in Maximo
- Allows for designation of sealed bids
- Provides varied bid analysis
- Buyers and contract agents never leave Maximo to create, to analyze and award a bid event.
- Allows for approval of bid event prior to issuing contract
- The solution provides a hub that the vendors use to create and submit their bids without accessing Maximo (so no licensing issues)
- Cost
  - Zero Cost to Vendors/Contractors
  - Lowest Owning Cost to OPC

# Implementation Schedule

Activity	2020 Q3	2020 Q4	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2
Bids	X							
Demo's		X						
Recommendation		X						
Contract Negotiations			X					
Award			X					
Design Meetings				X				
Phase 1 & Phase 2 Testing					X	X		
Invite Vendors to Subscribe							X	
Conducted Vendor Training							X	
Go-Live							X	
Follow-up on issues								X

# Current Status (as of June 1, 2023)

- 2000 Active Vendors
- ~600 flagged as potential order hub vendors
- 304 Invited to Order Hub
- 224 Active Registered Vendors
  - 161 of Registered: \$83M spent in 2022
- **268 Events since Go-Live**
  - **Contracts**
    - 27 Awarded (\$11.4M)
    - 29 In Progress (\$104M)
  - **Non-Contract**
    - 701 Awarded (\$1.8M)
    - 14 In progress (\$40K)



# RFQ Inventory Items & Direct Issue Materials

# Sample RFQ: Inventory Items/Materials

**Purchase Requisitions**

Find PR [Search Icon] [Filter Icon] [Refresh Icon] [Back Icon] [Forward Icon] [Print Icon] [Share Icon] [Download Icon] [Upload Icon] [New Icon] [Close Icon]

List PR PR Lines Ship To / Bill To Terms and Conditions Log Specifications

PR: PR146856 Generated by reorder 12/17/21 5:40 AM

WF Last Memo Details: [Calendar Icon]

Site: CHATT

Status: APPR

Attachments [Paper Icon]

Notes: [Text Area]

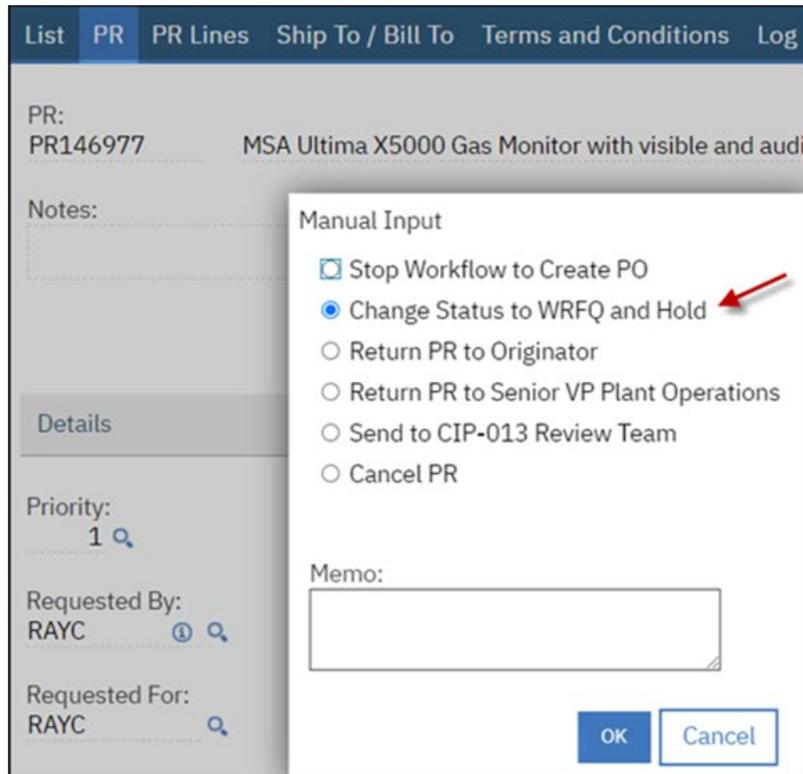
Details	Dates	Costs	Bid/Quote
Priority: 1	Status Date: 1/27/22 3:46 PM	Pretax Total: 700.0000	Bid and/or Quote:
Requested By: MAXCH	Requested Date: 12/17/21 5:40 AM	Total Tax: 0.0000	Bid/Quote Exception or Explanation:
Requested For:	Required Date: 12/17/21 5:40 AM	Total Cost: 700.0000	
Supervisor:		Currency: USD	
Contract Reference:		Total Cost before RFQ:	
Contract Type:			

**Callouts:**

- Status is approved** (points to Status: APPR)
- The Create RFQ button becomes available when the PR changes status to WRFQ (Waiting on RFQ)** (points to Create RFQ button)
- The Create PO(s) button will be available ONLY if the PR is not in Workflow and An RFQ was not created OR The RFQ was created and is either fully processed (Finalized) or cancelled** (points to Create PO(s) button)

# Sample RFQ: Inventory Items/Materials

If the PR is approved and in workflow, the buyer should workflow the record and select Change Status to WRFQ and Hold



PR: PR146977 MSA Ultima X5000 Gas Monitor with visible and aud

Notes:

Manual Input

- Stop Workflow to Create PO
- Change Status to WRFQ and Hold
- Return PR to Originator
- Return PR to Senior VP Plant Operations
- Send to CIP-013 Review Team
- Cancel PR

Memo:

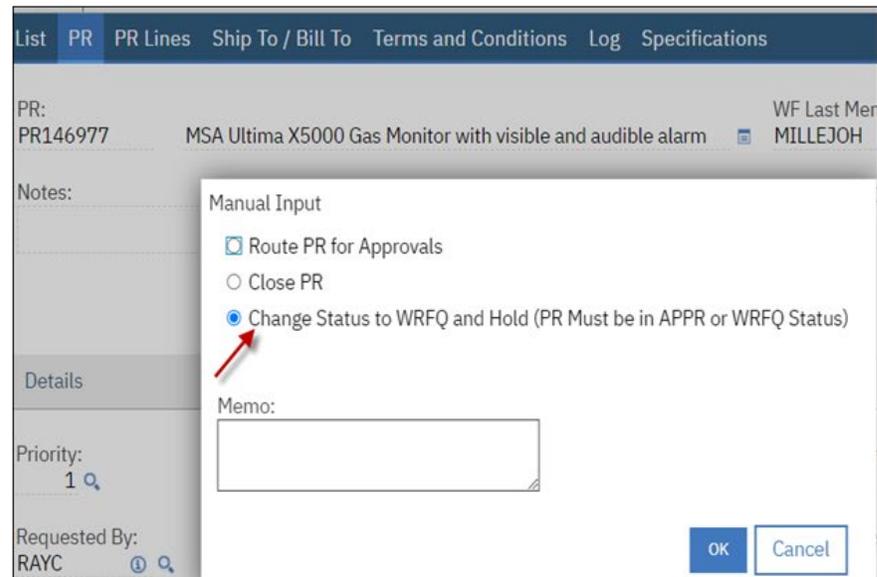
OK Cancel

Priority: 1

Requested By: RAYC

Requested For: RAYC

If the PR is approved or in WRFQ status and not in workflow, the buyer should workflow the record and select Change Status to WRFQ and Hold



PR: PR146977 MSA Ultima X5000 Gas Monitor with visible and audible alarm WF Last Mer MILLEJOH

Notes:

Manual Input

- Route PR for Approvals
- Close PR
- Change Status to WRFQ and Hold (PR Must be in APPR or WRFQ Status)

Memo:

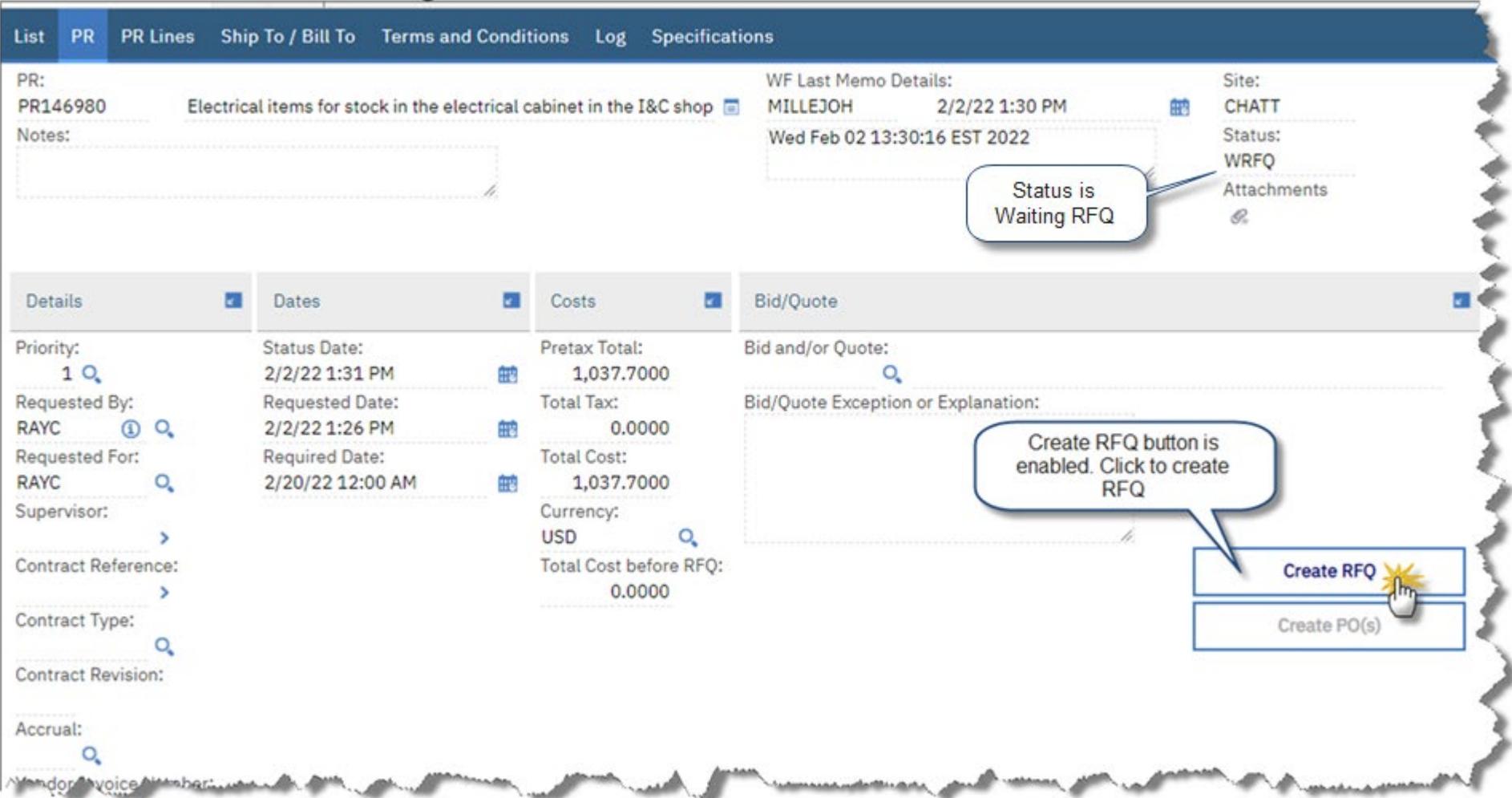
OK Cancel

Priority: 1

Requested By: RAYC

# Sample RFQ: Inventory Items/Materials

## Create the RFQ using Create RFQ button



PR: PR146980 Electrical items for stock in the electrical cabinet in the I&C shop

Notes:

WF Last Memo Details: MILLEJOH 2/2/22 1:30 PM  
Wed Feb 02 13:30:16 EST 2022

Site: CHATT  
Status: WRFQ  
Attachments

Status is Waiting RFQ

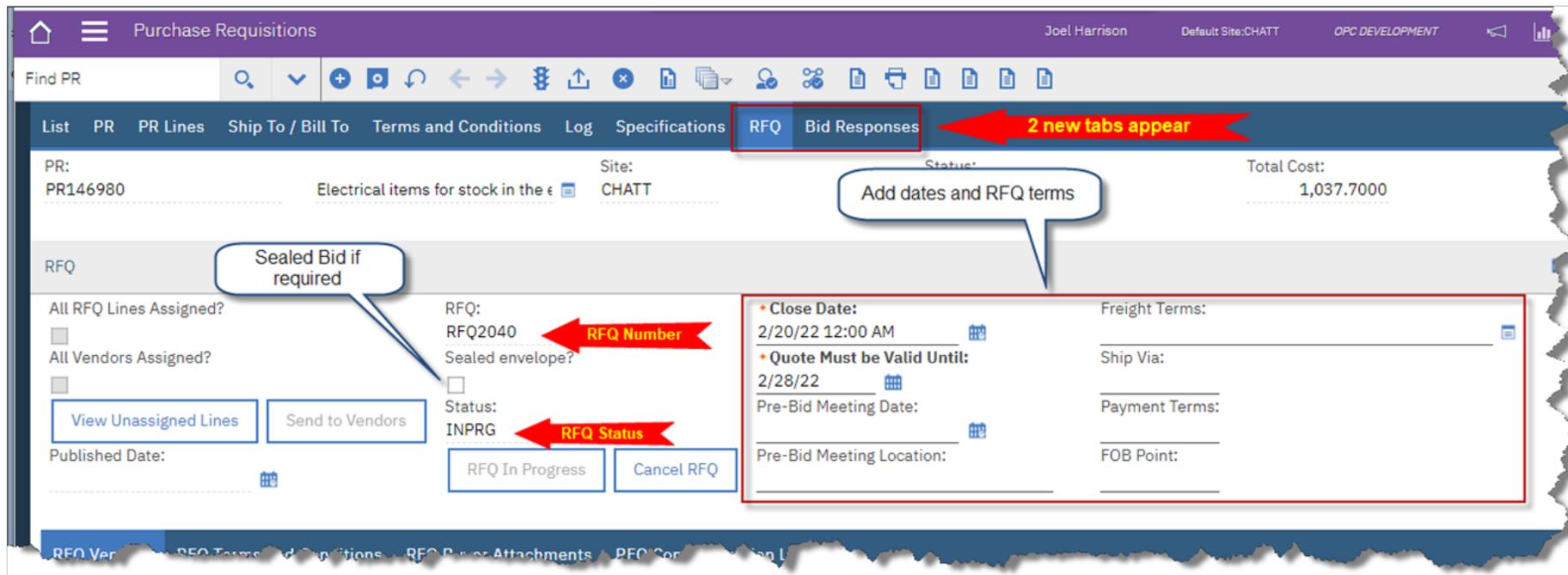
Details	Dates	Costs	Bid/Quote
Priority: 1	Status Date: 2/2/22 1:31 PM	Pretax Total: 1,037.7000	Bid and/or Quote:
Requested By: RAYC	Requested Date: 2/2/22 1:26 PM	Total Tax: 0.0000	Bid/Quote Exception or Explanation:
Requested For: RAYC	Required Date: 2/20/22 12:00 AM	Total Cost: 1,037.7000	
Supervisor:		Currency: USD	
Contract Reference:		Total Cost before RFQ: 0.0000	
Contract Type:			
Contract Revision:			
Accrual:			
Vendor Invoice Number:			

Create RFQ button is enabled. Click to create RFQ

Create RFQ  
Create PO(s)

# Sample RFQ: Inventory Items/Materials

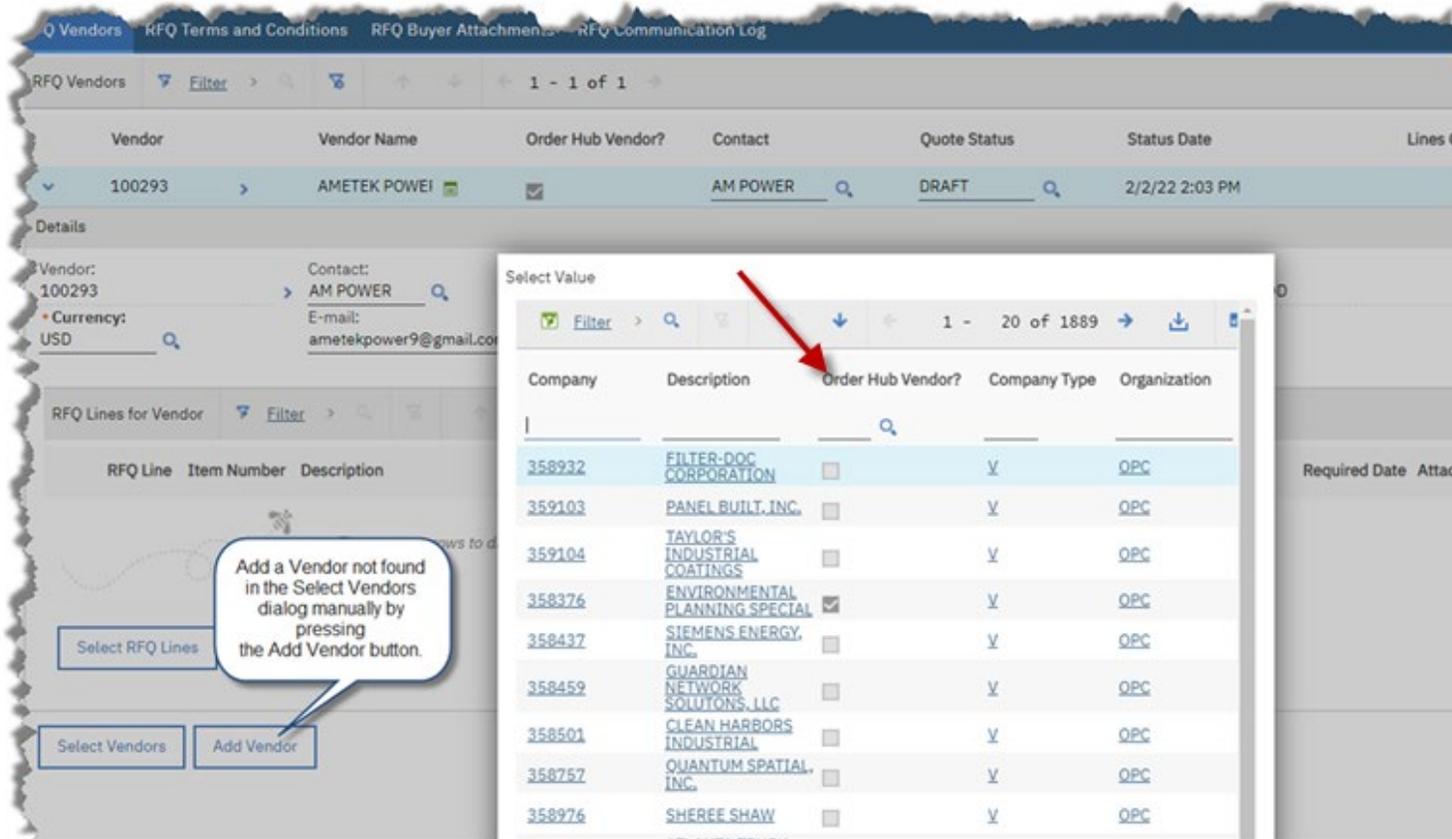
Once the RFQ is created, the RFQ and Bid Response tabs are visible  
 “Close Date” and “Quote Must be Valid Until” are required fields.



- Close Date – Quotes will not be accepted after this date/time.
- Quote Must be Valid Until – Any quotes submitted should be valid until this date

# Sample RFQ: Inventory Items/Materials

Add vendors to RFQ – Add Vendor button



The screenshot shows the 'Select Value' dialog box in an RFQ system. The dialog lists various companies with checkboxes for selection. A red arrow points to the 'Order Hub Vendor?' column. A callout box explains that vendors not found in the dialog can be added manually.

Company	Description	Order Hub Vendor?	Company Type	Organization
358932	FILTER-DOC CORPORATION	<input type="checkbox"/>	Y	QPC
359103	PANEL BUILT, INC.	<input type="checkbox"/>	Y	QPC
359104	TAYLOR'S INDUSTRIAL COATINGS	<input type="checkbox"/>	Y	QPC
358376	ENVIRONMENTAL PLANNING SPECIAL	<input checked="" type="checkbox"/>	Y	QPC
358437	SIEMENS ENERGY, INC.	<input type="checkbox"/>	Y	QPC
358459	GUARDIAN NETWORK SOLUTIONS, LLC	<input type="checkbox"/>	Y	QPC
358501	CLEAN HARBORS INDUSTRIAL	<input type="checkbox"/>	Y	QPC
358757	QUANTUM SPATIAL, INC.	<input type="checkbox"/>	Y	QPC
358976	SHEREE SHAW	<input type="checkbox"/>	Y	QPC

Callout text: Add a Vendor not found in the Select Vendors dialog manually by pressing the Add Vendor button.

RFQ will only allow Order Hub vendors. Non-Order Hub vendors are visible but cannot be selected.

# Sample RFQ: Inventory Items/Materials

Details

Vendor: 100293    Contact: AM POWER    Phone:    Payment Terms: NET30    Freight Terms: PREPAID AND ADD  
Currency: USD    E-mail: ametekpower9@gmail.com    Fax:    Ship Via:    FOB Point: Factory

RFQ Lines for Vendor    Filter    0 - 0 of 0

Select RFQ Lines that will be sent to this vendor for bidding.

Select RFQ Lines

RFQ Line #	Item Number	Description	Catalog #	Manufacturer	Model	Order Unit	Contract #	Contract Price
<input type="checkbox"/>	1	5987				CASE24		

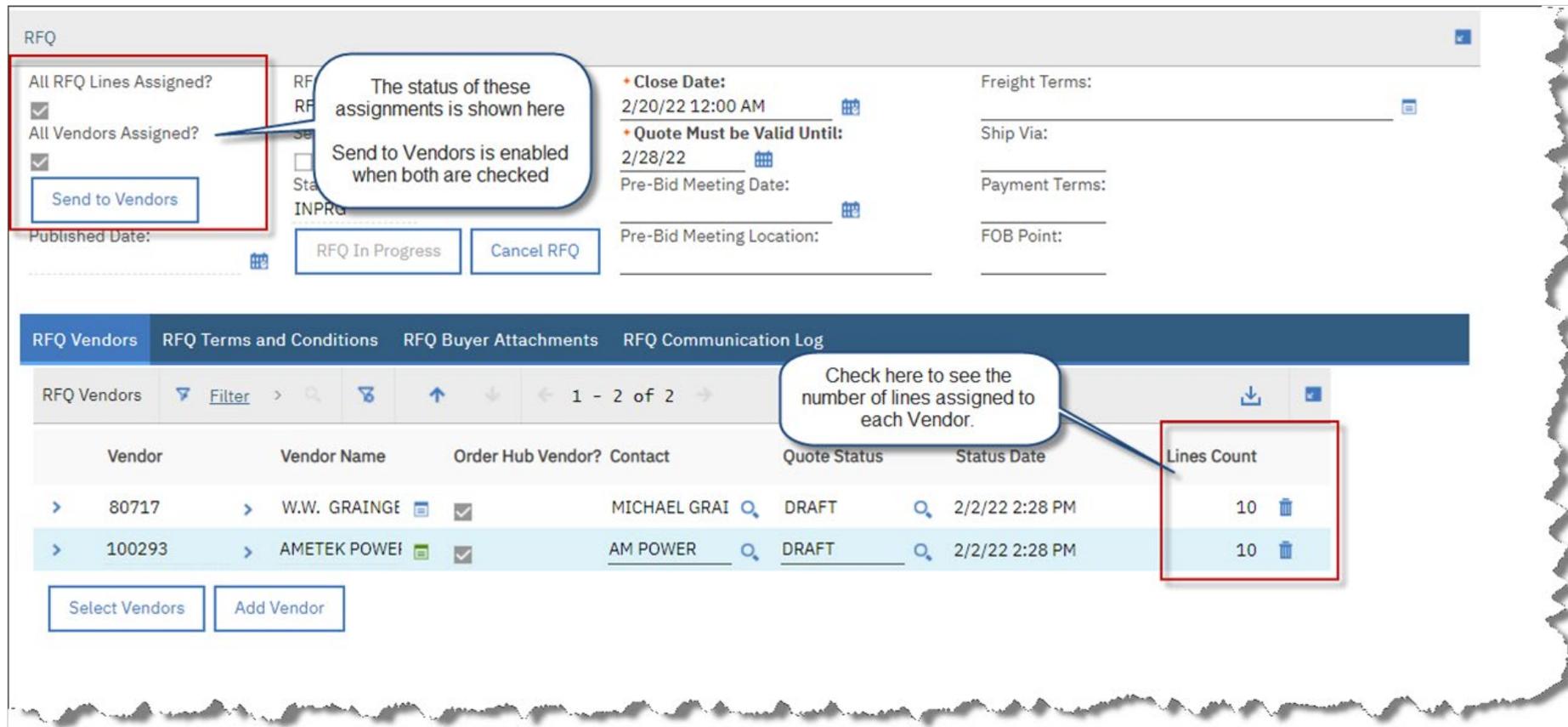
OK    Cancel

Continue to add vendors and lines as required

# Sample RFQ: Inventory Items/Materials

If any vendor(s) or items remain unassigned Maximo will not allow further processing.

Once all vendors have at least one line assigned, and all lines are assigned to at least one vendor the two checkboxes will be checked.



The screenshot displays the Maximo RFQ interface. At the top, there are two checkboxes: "All RFQ Lines Assigned?" and "All Vendors Assigned?", both of which are checked. A "Send to Vendors" button is located below these checkboxes. A callout box points to these checkboxes with the text: "The status of these assignments is shown here" and "Send to Vendors is enabled when both are checked".

Below the checkboxes, there are several fields for RFQ details: "Close Date" (2/20/22 12:00 AM), "Quote Must be Valid Until" (2/28/22), "Pre-Bid Meeting Date", "Pre-Bid Meeting Location", "Freight Terms", "Ship Via", "Payment Terms", and "FOB Point".

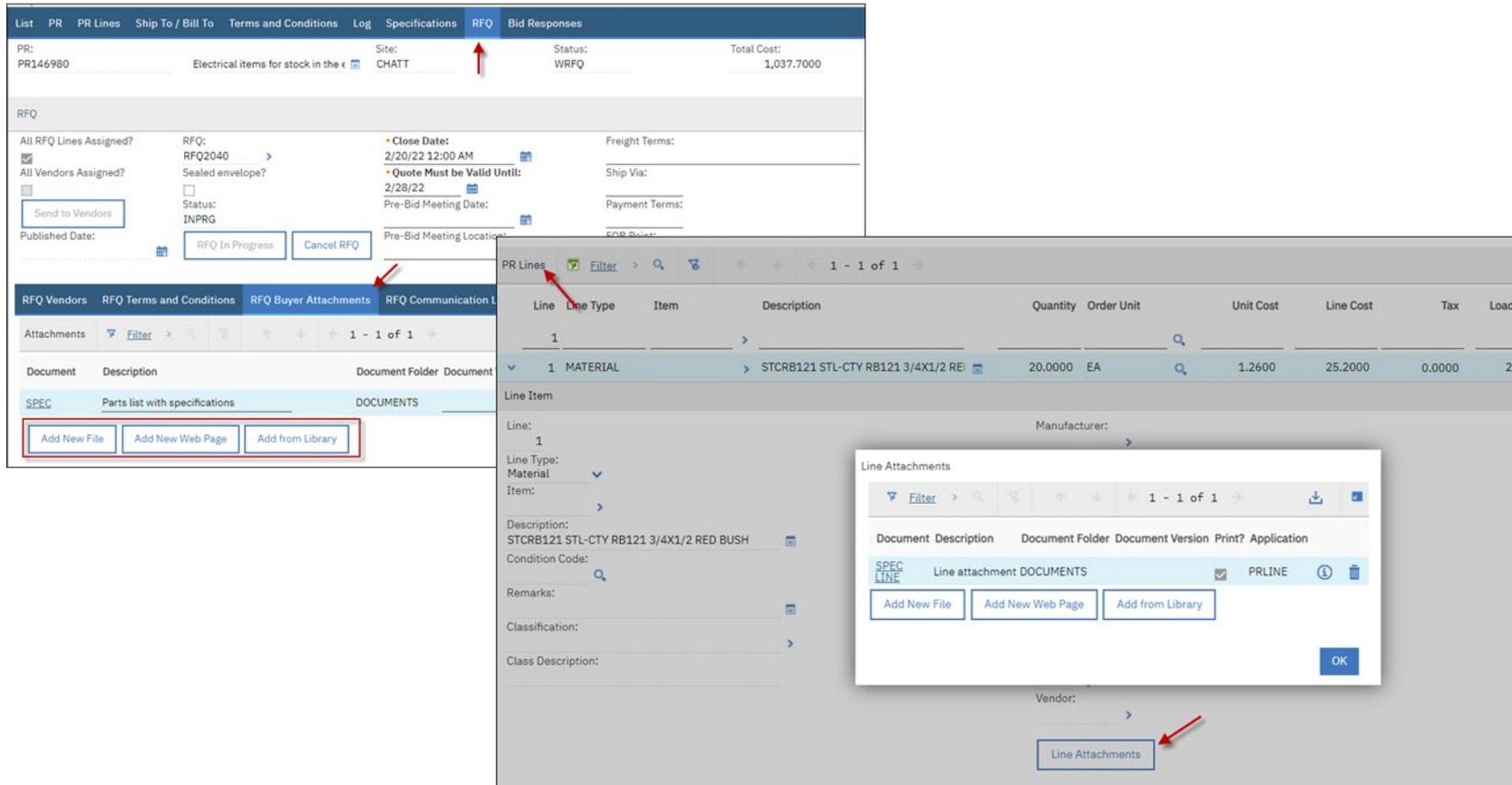
The main section of the interface is a table titled "RFQ Vendors". The table has columns for Vendor, Vendor Name, Order Hub Vendor?, Contact, Quote Status, Status Date, and Lines Count. Two vendors are listed: 80717 (W.W. GRAINGE) and 100293 (AMETEK POWER). Both vendors have a "Lines Count" of 10. A callout box points to the "Lines Count" column with the text: "Check here to see the number of lines assigned to each Vendor."

Vendor	Vendor Name	Order Hub Vendor?	Contact	Quote Status	Status Date	Lines Count
80717	W.W. GRAINGE	<input checked="" type="checkbox"/>	MICHAEL GRAI	DRAFT	2/2/22 2:28 PM	10
100293	AMETEK POWER	<input checked="" type="checkbox"/>	AM POWER	DRAFT	2/2/22 2:28 PM	10

At the bottom of the table, there are buttons for "Select Vendors" and "Add Vendor".

# Sample RFQ: Inventory Items/Materials

Attachments can be added from the RFQ tab and from the PR Lines tab



The screenshot displays the software interface for managing RFQs and PR Lines. The top navigation bar includes tabs for List, PR, PR Lines, Ship To / Bill To, Terms and Conditions, Log, Specifications, RFQ, and Bid Responses. The main content area is divided into two sections: RFQ and PR Lines.

**RFQ Section:** Shows details for PR146980, including the description "Electrical items for stock in the...", Site: CHATT, Status: WRFQ, and Total Cost: 1,037.7000. Below this, there are fields for RFQ details such as RFQ2040, Close Date (2/20/22 12:00 AM), Quote Must be Valid Until (2/28/22), and Status (INPRG). A "Send to Vendors" button is visible, and a red arrow points to the "RFQ" tab in the navigation bar.

**PR Lines Section:** Displays a table with columns: Line, Line Type, Item, Description, Quantity, Order Unit, Unit Cost, Line Cost, Tax, and Load. The table contains one entry: Line 1, Material, STCRB121 STL-CTY RB121 3/4X1/2 REI, 20.0000 EA, 1.2600, 25.2000, 0.0000, 25. Below the table, there are fields for Line Item details, including Line Type (Material), Item, Description (STCRB121 STL-CTY RB121 3/4X1/2 RED BUSH), and Condition Code. A red arrow points to the "PR Lines" tab in the navigation bar.

**Attachments:** The "RFQ Buyer Attachments" and "RFQ Communication" tabs are highlighted. The "Attachments" section shows a table with columns: Document, Description, Document Folder, and Document. Below this table, three buttons are highlighted with a red box: "Add New File", "Add New Web Page", and "Add from Library".

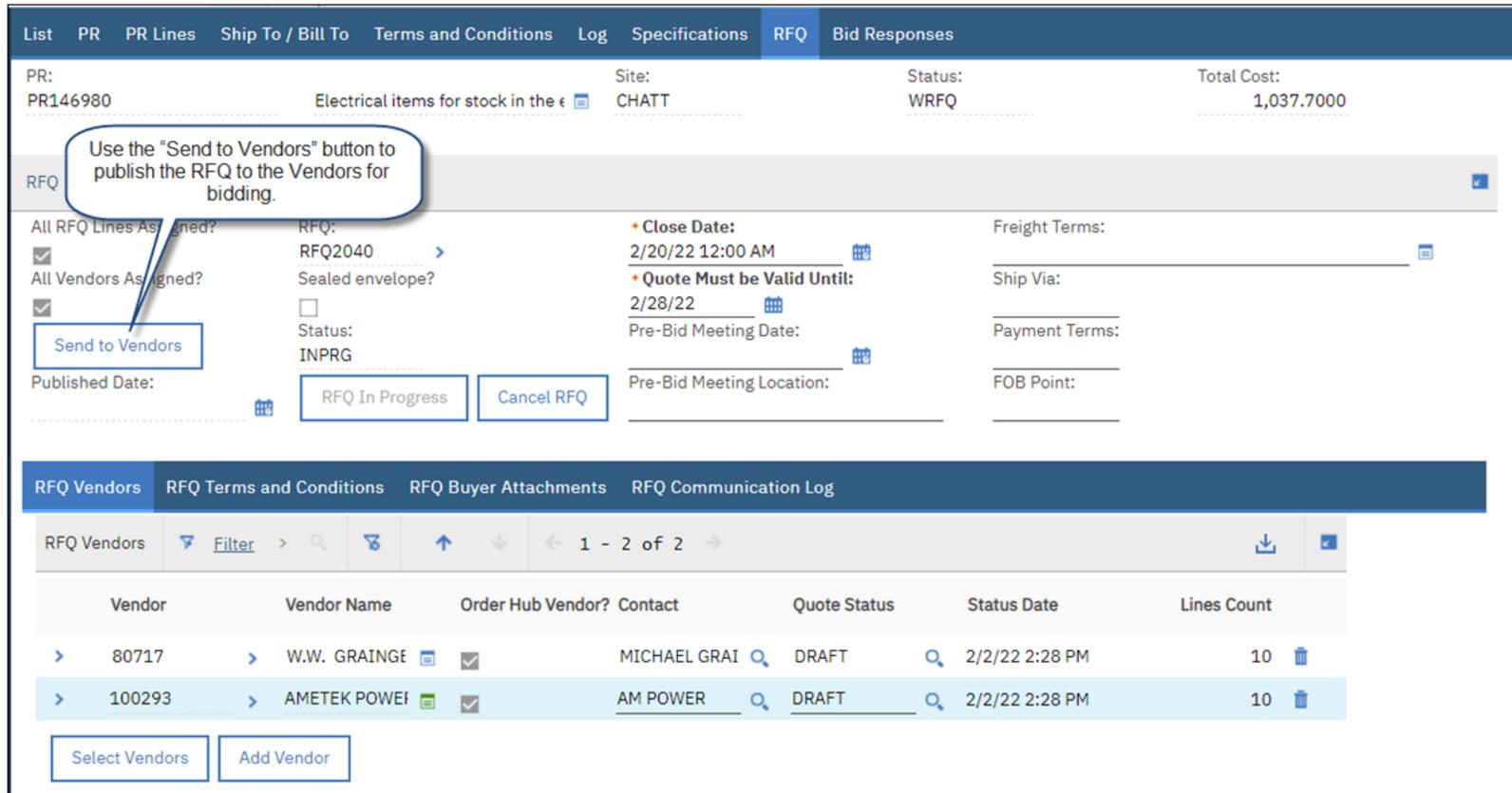
**Line Attachments Dialog:** A dialog box titled "Line Attachments" is open, showing a table with columns: Document, Description, Document Folder, Document Version, Print?, and Application. The table contains one entry: SPEC LINE, Line attachment: DOCUMENTS, PRLINE. Below the table, the same three buttons are present: "Add New File", "Add New Web Page", and "Add from Library". A red arrow points to the "Line Attachments" button at the bottom of the dialog.

These attachments are sent to all vendors on the RFQ when the RFQ is sent to the vendors

# Sample RFQ: Inventory Items/Materials

Publish RFQ for vendors to bid

Once all the vendors and lines are assigned and any attachments required are attached, use the “Send to Vendors” button to publish the RFQ to the Vendors for bidding.



The screenshot displays the RFQ management interface. At the top, there are tabs for 'List', 'PR', 'PR Lines', 'Ship To / Bill To', 'Terms and Conditions', 'Log', 'Specifications', 'RFQ', and 'Bid Responses'. The 'RFQ' tab is active, showing details for PR146980: 'Electrical items for stock in the € CHATT'. The status is 'WRFQ' and the total cost is 1,037.7000.

Below the header, there are checkboxes for 'All RFQ Lines Assigned?' and 'All Vendors Assigned?'. A callout box points to the 'Send to Vendors' button with the text: 'Use the "Send to Vendors" button to publish the RFQ to the Vendors for bidding.' Other buttons include 'RFQ In Progress' and 'Cancel RFQ'.

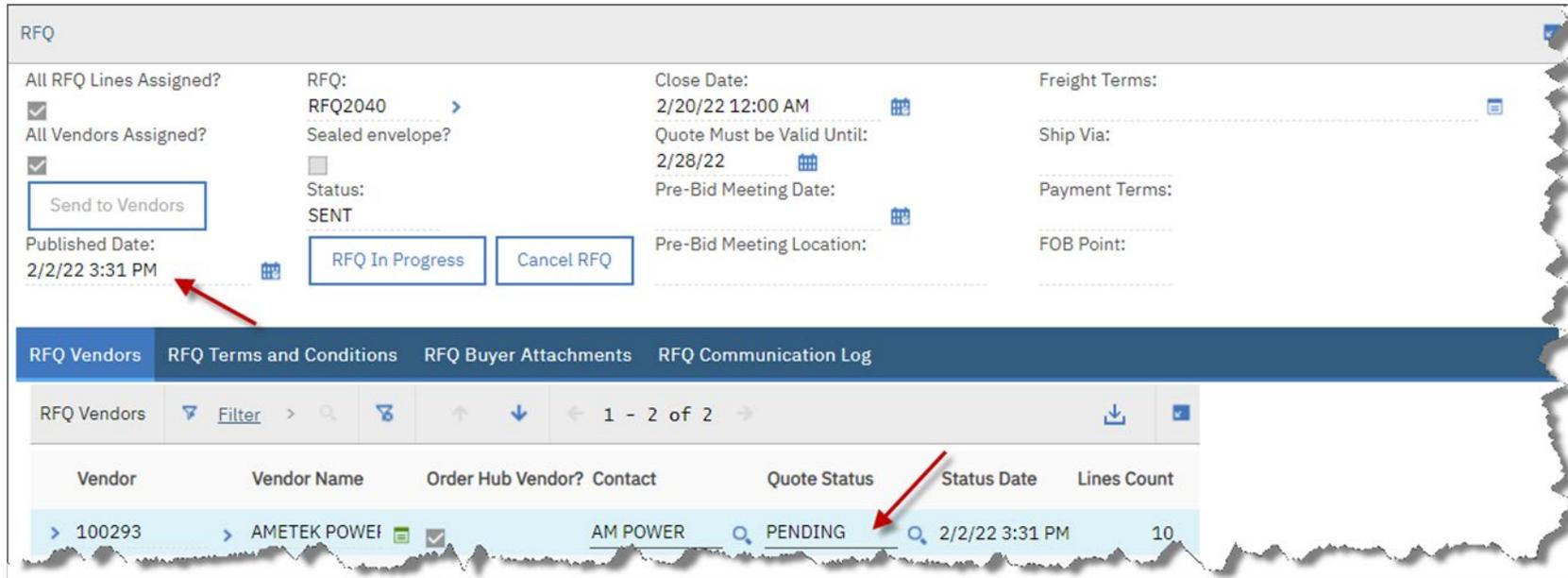
The 'RFQ Vendors' section shows a table with the following data:

Vendor	Vendor Name	Order Hub Vendor?	Contact	Quote Status	Status Date	Lines Count
80717	W.W. GRAINGE	<input checked="" type="checkbox"/>	MICHAEL GRAI	DRAFT	2/2/22 2:28 PM	10
100293	AMETEK POWER	<input checked="" type="checkbox"/>	AM POWER	DRAFT	2/2/22 2:28 PM	10

Buttons for 'Select Vendors' and 'Add Vendor' are located at the bottom of the vendor list.

# Sample RFQ: Inventory Items/Materials

The published date will show when the RFQ was sent to the vendors



The screenshot displays the RFQ configuration page. On the left, there are checkboxes for 'All RFQ Lines Assigned?' and 'All Vendors Assigned?'. A 'Send to Vendors' button is highlighted with a red box. The 'Published Date' is shown as '2/2/22 3:31 PM', with a red arrow pointing to it. The RFQ ID is 'RFQ2040' and the status is 'SENT'. Other fields include 'Close Date' (2/20/22 12:00 AM), 'Quote Must be Valid Until' (2/28/22), and 'Pre-Bid Meeting Date'. Below the configuration is a navigation bar with tabs for 'RFQ Vendors', 'RFQ Terms and Conditions', 'RFQ Buyer Attachments', and 'RFQ Communication Log'. The 'RFQ Vendors' tab is active, showing a table with the following data:

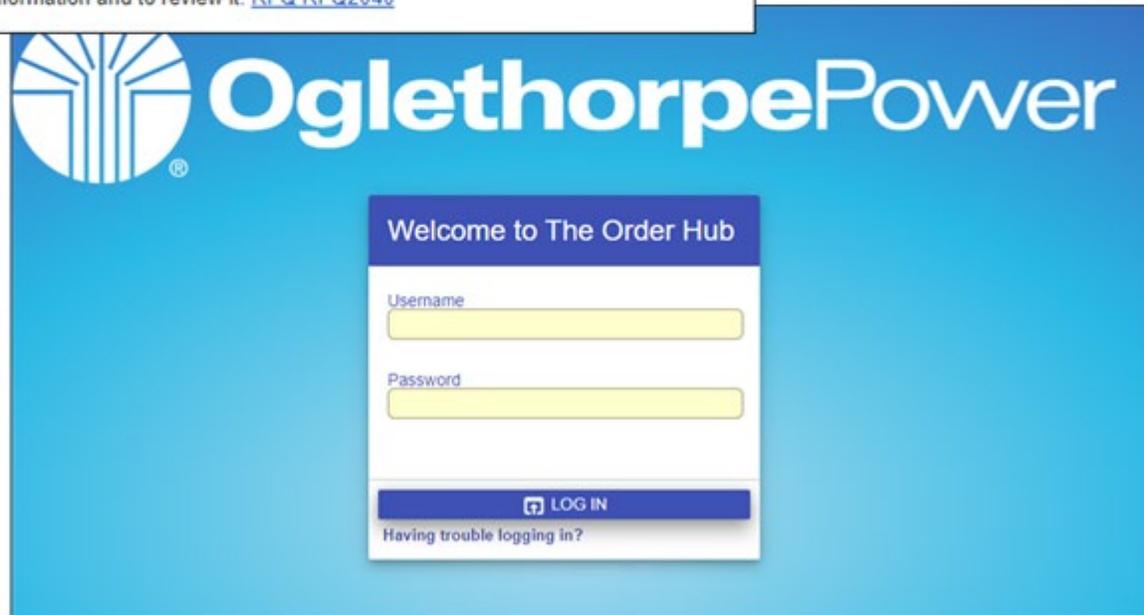
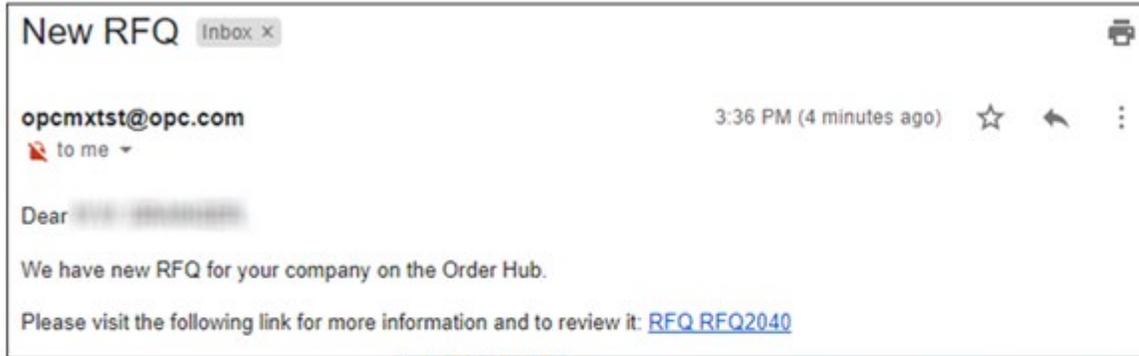
Vendor	Vendor Name	Order Hub Vendor?	Contact	Quote Status	Status Date	Lines Count
> 100293	> AMETEK POWER	<input checked="" type="checkbox"/>	AM POWER	PENDING	2/2/22 3:31 PM	10

Quote status will change from DRAFT to PENDING for each vendor.

The vendor will receive a notification within (5) minutes.

# Sample RFQ: Inventory Items/Materials

Each vendor's contact on the RFQ will be notified by Email.  
They use the Order Hub to process the quote.



# After logging in the Vendor is taken directly to the RFQ...

The Order Hub - Development  
Welcome, Biljana Jovanovic

P2Insight

REQUEST FOR QUOTATION

RFQ #: RFQ1262

DETAILS    TERMS & CONDITIONS    EVENT LOG    ATTACHMENTS (1)    VENDOR ATTACHMENTS (0)

**Buyer Information**



Name: Oglethorpe Power  
Address: Arcadia, Arcadia, WI, 54612  
E-mail: [m.wilson@helwig.com](mailto:m.wilson@helwig.com)  
Contact name: Mike Wilson  
Phone: (617) 555-9017

4d 13h 39m 4s

**Status & Dates**

Publish Date: 01/13/2022 02:41    Close Date: 01/18/2022 02:34    Status: PENDING

Pre-Bid Meeting Date/Time: 01/17/2022 02:34    Pre-Bid Meeting Location: Online meeting

Confirmed/Rejected Date:    Confirmed/Rejected Comment:

Quote Submitted Date:    Quote Must be valid until: 01/31/2022

**General Terms**

This is a RFQ for a one time purchase

Payment Terms:    Freight Terms:

Ship Via:    Fob Point:

Currency: USD

Quote #:    Quote Valid Until:

Description: Replacement Pillows for UPS-A Batteries

**RFQ Lines**

Show 10 entries

Line number	Item	Description	Manufacturer	Model #	Quantity	UOM	Vendor Price	Not bidding on line	Actions
1	Vendor:	12"X12X ABSORB & NEUTRALIZE PILLOW			30	EACH		No	
2	Vendor:	4"X24" ABSORB & NEUTRALIZE SOCS			15	EACH		No	
3	Vendor:	INSTALLATION LABOR			1	EACH		No	

Showing 1 to 3 of 3 entries

Review RFQ and confirm will Bid

All Lines are initially red, and will remain red until updated.

# Color Coded Lines help track progress of bid

The Order Hub - Development  
Welcome, Bijana Jovanovic

P2Insight

REQUEST FOR QUOTATION

RFQ #: RFQ1262

[← BACK](#)  
[X DECLINE BID](#)  
[UPDATE](#)  
[REPORT A TECHNICAL ISSUE](#)

[DETAILS](#)   [TERMS & CONDITIONS](#)   [EVENT LOG](#)   [ATTACHMENTS \(1\)](#)   [VENDOR ATTACHMENTS \(0\)](#)

**Buyer Information**



Name: Oglethorpe Power  
Address: Arcadia, Arcadia, WI, 54612  
E-mail: [m.wilson@helwig.com](mailto:m.wilson@helwig.com)  
Contact name: Mike Wilson  
Phone: (617) 555-9017

3d 23h 35m 29s

**Status & Dates**

Publish Date	Close Date	Status
01/13/2022 02:54	01/18/2022 02:44	CONFIRMED
Pre-Bid Meeting Date/Time	Pre-Bid Meeting Location	
01/17/2022 02:44	Online meeting	
Confirmed/Rejected Date	Confirmed/Rejected Comment	
01/14/2022 02:29	Confirmed.	
Quote Submitted Date	Quote Must be valid until	
	01/31/2022	

**General Terms**

This is a RFQ for a one time purchase

Payment Terms:    Freight Terms:

Ship Via:    Fob Point:

Currency: USD

Quote #:    Quote Valid Until \*:

Description: Replacement Pillows for UPS-A Batteries

**RFQ Lines**

Show  entries

Line number	Item	Description	Manufacturer	Model #	Quantity	UOM	Vendor Price	Not bidding on line	Actions
1	Vendor:	12"X12X ABSORB & NEUTRALIZE PILLOW			30	EACH	32.0000	No	
2	Vendor:	4"X24" ABSORB & NEUTRALIZE SOCS			15	EACH	10.0000	No	
3	Vendor:	INSTALLATION LABOR			1	EACH		No	

Showing 1 to 3 of 3 entries

**Ship To**

Franklin, MA  
10987 Oak Street  
Franklin, MA, 03420

**Reply To**

Main addr Bedford MA Site of EAGLE Inc. NA  
100 Crosby Drive  
Bedford, MA, 01730 / KATHYB

**Summary**

# Of Lines with Quantity Difference:	0
# Of Lines where there is Delivery Date Difference	1
# Of non-bid Lines	0
# Of Lines where Item Substitution Approval is Required:	0
# of non-reviewed lines	1
# of lines requiring further attention	1
# of reviewed and finalized lines	1
Awarded	1

**Vendor Totals**  
Total: \$1,110.0000 USD

Green Lines have been reviewed and are ready to be submitted.

Yellow means work in progress – Internal Hold

Red line have not been updated yet!

# Then for each line they enter Price and other details

**Quotation line / RFQ Line # 1**

DETAILS    BUYER ATTACHMENTS (1)    VENDOR ATTACHMENTS (0)

**Buyer Request**

Item #  Description

Catalog Code  Manufacturer  Model #

Allow Substitution

Contract #  Contract Price

Quantity  UOM  Delivery Date

Remarks

**Catalog Details**

Catalog #  Description \*

Manufacturer  Model #

**Vendor Response**

We are responding with:

Exactly as requested     As requested, but with data corrections

Please explain the difference \*

Quantity *	UOM	Reason for Changed Quantity *
<input type="text" value="32.00"/>	<input type="text" value="EACH"/>	<input type="text" value="Packaging"/>

Unit Price *	Currency	Line cost	Delivery Date
<input type="text" value="32.0000"/>	<input type="text" value="USD"/>	<input type="text" value="1024.0000"/>	<input type="text" value="01/31/2022"/>

Remarks

Not bidding on line

**Buyer Request**

**Vendor Response**

Vendor can update any missing information

Vendor enter bid price

Vendor can chose NOT to bid on a line

# Attachments can be sent at RFQ or RFQ Line level

The Order Hub - Development  
Welcome, Biljana Jovanovic

REQUEST FOR QUOTATION

RFQ #: RFQ1262

DETAILS   TERMS & CONDITIONS   EVENT LOG   **ATTACHMENTS (1)**   VENDOR ATTACHMENTS (0)

← BACK  
✕ DECLINE BID  
📄 UPDATE  
🗨️ REPORT A TECHNICAL ISSUE

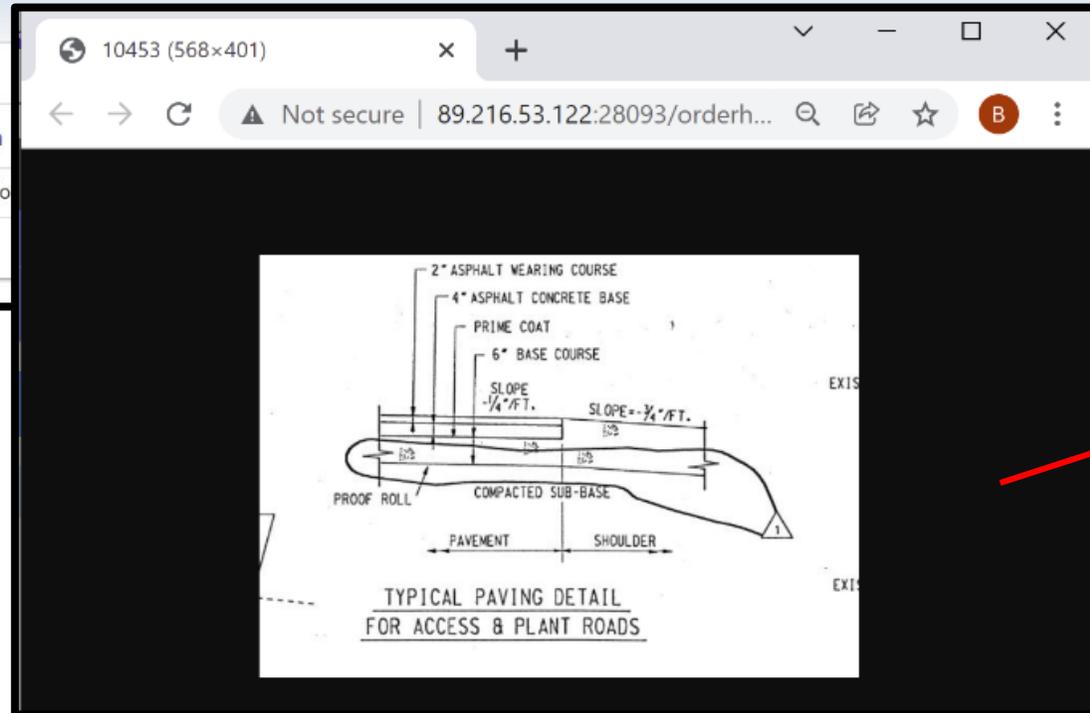
Documents

Show 10 entries

Id	Name	Description
SPEC1		RFQ spec do

Showing 1 to 1 of 1 entries

Type	Synced?	Actions
Attachments	No	↓



View or download

# All events and communication with the Buyer are logged in the same place – Order Hub & the Event Log and Comm Log in Maximo

The Order Hub - Development  
Welcome, Biljana Jovanovic

REQUEST FOR QUOTATION

RFQ #: RFQ1262

DETAILS TERMS & CONDITIONS **EVENT LOG** ATTACHMENTS (1) VENDOR ATTACHMENTS (1)

State History

Show 10 entries

Date	From	To	Status	Description	Subject
01/16/2022 16:27	opc.biljana@gmail.com	m.wilson@helwig.com	SENT	Vendor communication to Buyer	RE: RFQ RFQ1262 - clarification required
01/16/2022 16:07	m.wilson@helwig.com	opc.biljana@gmail.com	SENT	Buyer communication to Vendor	Request for Quote RFQ1262 notification
01/16/2022 16:03	m.wilson@helwig.com	opc.biljana@gmail.com	SENT	General Notice to all Vendors	Request for Quote RFQ1262 - Amendment
01/14/2022 03:23	opc.biljana@gmail.com	m.wilson@helwig.com	SENT	Vendor Submits Bid	Bid Submission
01/14/2022 02:29	opc.biljana@gmail.com	m.wilson@helwig.com	SENT	Vendor Confirms will Bid	RE: RFQ RFQ1262, P2INSIGHT INC. intends to bid
01/14/2022 02:17	opc.biljana@gmail.com	m.wilson@helwig.com	SENT	Vendor rejected bidding on RFQ	RE: RFQ RFQ1262, P2INSIGHT INC. will NOT bid
01/13/2022 03:46	opc.biljana@gmail.com	m.wilson@helwig.com	SENT	Vendor Confirms will Bid	RE: RFQ RFQ1262, P2INSIGHT INC. intends to bid
01/13/2022 03:35	opc.biljana@gmail.com	m.wilson@helwig.com	SENT	Vendor rejected bidding on RFQ	RE: RFQ RFQ1262, P2INSIGHT INC. will NOT bid
01/13/2022 02:55	m.wilson@helwig.com	opc.biljana@gmail.com	SENT	Buyer send RFQ to Vendors.	New RFQ

Showing 1 to 9 of 9 entries

Communication Log:  
Buyer's email notifications  
and your messages

System logged events:

- New RFQ
- Reject to bid
- Confirm will bid
- Submit Bid
- Notice of RFQ Cancellation
- Awarded RFQs - Win/Regret Notifications

# Buyer can send notifications. Vendor can reply or ask for Clarification if appropriate or necessary.

The Order Hub - Development  
Welcome, Biljana Jovanovic

P2Insight

REQUEST FOR QUOTATION

RFQ #: RFQ1262

DETAILS TERMS & CONDITIONS **EVENT LOG** ATTACHMENTS (1) VENDOR ATTACHMENTS (1)

← BACK  
UPDATE  
SUBMIT TO CUSTOMER  
REPORT A TECHNICAL ISSUE

State History

Show 10 entries

Date	From	To	Status	Description	Subject
01/16/2022 16:27	opc.biljana@gmail.com	m.wilson@helwig.com	SENT	Vendor communication to Buyer	RE: RFQ RFQ1262 - clarification required
01/16/2022 16:07	m.wilson@helwig.com	opc.biljana@gmail.com	SENT	Buyer communication to Vendor	Request for Quote RFQ1262 notification
01/16/2022 16:03	m.wilson@helwig.com	opc.biljana@gmail.com	SENT	General Notice to all Vendors	Request for Quote RFQ1262 - Amendment
01/14/2022 03:23	opc.biljana@gmail.com	m.wilson@helwig.com	SENT	Vendor Submits Bid	Bid Submission
01/14/2022 02:29	opc.biljana@gmail.com	m.wilson@helwig.com	SENT	Vendor Confirmation	
01/14/2022 02:17	opc.biljana@gmail.com	m.wilson@helwig.com	SENT	Vendor rejected	
01/13/2022 03:46	opc.biljana@gmail.com	m.wilson@helwig.com	SENT	Vendor Confirmation	
01/13/2022 03:35	opc.biljana@gmail.com	m.wilson@helwig.com	SENT	Vendor rejected	
01/13/2022 02:55	m.wilson@helwig.com	opc.biljana@gmail.com	SENT	Buyer send RFQ	

Showing 1 to 9 of 9 entries

CREATE COMMUNICATION LOG

Message

To: opc.biljana@gmail.com

From: m.wilson@helwig.com

Subject: Request for Quote RFQ1262 notification

Message: Request for Quote RFQ1262 - additional information

Enter content here

Show 10 entries

Id	Name	Description	Type	Synced?	Actions
No data available in table					

Showing 0 to 0 of 0 entries

REPLY CANCEL

Status Change

To: m.wilson@helwig.com

From: opc.biljana@gmail.com

Subject: RE: Request for Quote RFQ1262 notification

Message:

ADD NEW DOCUMENT

Show 10 entries

Id	Name	Description	Type	Synced?	Actions
No data available in table					

Showing 0 to 0 of 0 entries

SAVE CANCEL

# When all line are priced, they turn green, and Vendor can submit the bid...

The Order Hub - Development  
Welcome, Biljana Jovanovic
P2Insight 

REQUEST FOR QUOTATION

RFQ #: RFQ1262

DETAILS
TERMS & CONDITIONS
EVENT LOG
ATTACHMENTS (1)
VENDOR ATTACHMENTS (0)

**Buyer Information**



Name: Oglethorpe Power  
Address: Arcadia, Arcadia, WI, 54612  
E-mail: [m.wilson@helwig.com](mailto:m.wilson@helwig.com)  
Contact name: Mike Wilson  
Phone: (617) 555-9017

3d 23h 28m 43s

**Status & Dates**

Publish Date	Close Date	Status
01/13/2022 02:54	01/18/2022 02:44	CONFIRMED
<b>Pre-Bid Meeting</b>		
Date/Time	Pre-Bid Meeting Location	
01/17/2022 02:44	Online meeting	
<b>Confirmed/Rejected</b>		
Date	Confirmed/Rejected Comment	
01/14/2022 02:29	Confirmed.	
Quote Submitted Date	Quote Must be valid until	
	01/31/2022	

**General Terms**

This is a RFQ for a one time purchase

Payment Terms	Freight Terms
Ship Via	Fob Point
Currency	
USD	
Quote #	Quote Valid Until *
<b>Description</b>	
Replacement Pillows for UPS-A Batteries	

⚙️

← BACK

✕ DECLINE BID

🔄 UPDATE

📄 SUBMIT TO CUSTOMER

🚩 REPORT A TECHNICAL ISSUE

**RFQ Lines**

Show 10 entries

Line number	Item	Description	Manufacturer	Model #	Quantity	UOM	Vendor Price	Not bidding on line	Actions
1	Vendor:	12"X12X ABSORB & NEUTRALIZE PILLOW			30	EACH	32.0000	No	
2	Vendor:	4"X24" ABSORB & NEUTRALIZE SOCS			15	EACH	22.0000	No	
3	Vendor:	INSTALLATION LABOR			1	EACH	2500.0000	No	

Showing 1 to 3 of 3 entries

# Sample RFQ: Inventory Items/Materials

Quote status changes to CONFIRMED if the vendor intends to bid and DECLINED if the vendor declines to bid

RFQ Vendors   RFQ Terms and Conditions   RFQ Buyer Attachments   RFQ Communication Log						
RFQ Vendors <input checked="" type="checkbox"/> Filter > 🔍 ⚙️ ⬆️ ⬇️ ⬅️ 1 - 2 of 2 ➡️						
Vendor	Vendor Name	Order Hub Vendor?	Contact	Quote Status	Status Date	
>	>	>	>	>	>	>
▼ 358916	NABCO ELECTR 	<input checked="" type="checkbox"/>	JANE NABCO 	CONFIRMED 	9/7/22 7:28 AM	
> 359334	MULLINS MECH 	<input checked="" type="checkbox"/>	JOHN MULLINS 	DECLINED 	9/7/22 7:31 AM	

Quote status changes to SUBMITTED when the vendor has submitted their bid unless the bid is sealed

RFQ Vendors   RFQ Terms and Conditions   RFQ Buyer Attachments   RFQ Communication Log						
RFQ Vendors ⌵ Filter > 🔍 ⚙️ ⬆️ ⬇️ ⬅️ 1 - 2 of 2 ➡️  						
Vendor	Vendor Name	Order Hub Vendor?	Contact	Quote Status	Status Date	Lines Count
>	>	>	>	>	>	>
> 358916	NABCO ELECTR 	<input checked="" type="checkbox"/>	JANE NABCO 	SUBMITTED 	6/29/22 3:49 PM	2
> 359334	MULLINS MECH 	<input checked="" type="checkbox"/>	JOHN MULLINS 	PENDING 	6/29/22 3:05 PM	2

# Sample RFQ: Inventory Items/Materials

Once submitted bids can be reviewed on the Bid Response tab for each line. The requested information and the vendor response is displayed side by side.

Quotations for Vendor 80717 Filter 1 - 4 of 4

Line	Item	Description	Catalog #	Manufacturer	Model	Quantity	Order Unit	Currency
1		FOLDING SHELF; STEEL, LIGHT GRAY POWDER	32FC20	HOFFMAN	AA35SHLF1818	5.0000	EA	USD
2		STORCH PRODUCTS DISC MAGNET: NEODYMIUM, NICKEAX. PULL, 0.12 IN THICK, 1 IN DIA	35KC23	STORCH	B002-6025-035N	20.0000	EA	USD
3		USB CABLE: 2.0, 6 FT CABLE LG, BLACK, A MALE TO 5 PI	5XFY4	MONOPRICE	5458	5.0000	EA	USD
4		SHIPPING				1.0000	EA	USD

Line Item	Buyer Request	Vendor Response
RFQ Line: 1	Description: FOLDING SHELF; STEEL, LIGHT GRAY POWDER	Description: FOLDING SHELF; STEEL, LIGHT GRAY POWDER
Item:	Catalog #: 32FC20	Catalog #: 32FC20
Allow Substitution: No	Manufacturer: HOFFMAN	Manufacturer: HOFFMAN
Commodity Group:	Model: aa35shlf1818	Model: AA35SHLF1818
Commodity:	Required Date: 4/4/22	Delivery Date: 4/20/22
Contract #:	Quantity: 5.0000	Quantity: 5.0000
Contract Price:	Order Unit: EA	Order Unit: EA
	Currency: USD	Unit Cost: 497.7000
	Base Currency: USD	Base Unit Cost: 497.7000
	Remarks:	Is Update? <input checked="" type="checkbox"/>
		Update Reason: Additional Catalog information provided
		Is Substitute? <input type="checkbox"/>
		Substitution Reason:
		No Bid on Line? <input type="checkbox"/>
		Vendor Remarks:
		Qty Change Reason:

Buyer Request information displayed on the left

Vendor Response information displayed on the right

# Sample RFQ: Inventory Items/Materials

Buyer can also review all submissions on the “Comparative Selection” tab.  
Bids cannot be awarded until RFQ Status changes to BIDSELECT.

Line	Item	Not Awarding?	Vendor 1	Unit Cost	Awarded?	Vendor 2	Unit Cost	Awarded?	Vendor 3	Unit Cost	Awarded?	Vendor 4	Unit Cost	Awarded?
1	STCRB121 STL-CTY RB121 3/4X1/2 RED BUSH	<input type="checkbox"/>	AMETEK POWER INSTRUMENT	3.0000	<input type="checkbox"/>	W.W. GRAINGER	2.0000	<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>

**Requested** ←

Responses are displayed side by side with differences highlighted in RED

# Sample RFQ: Inventory Items/Materials

## Request for Quote Details Report

RFQ1999: Fall 2022 Major

Site: CHATT  
 Requested By: [REDACTED]  
 Status: FINALIZED

Required Date: 8/24/22  
 Requested Date: 8/24/22  
 Sealed Bid: No

Est. Total Cost: \$6.00

### RFQ Line Details

Line	Description	Quantity	Order Unit	Est. Unit Cost	Est. Line Cost
1	2 WEEK RENTAL - PUMP, TRASH, DIESEL POWERED, 4"	2	EA	\$1.00	\$2.00
2	2 WEEK RENTAL - HOSE, 4", RIGID, 160 LENGTH	1	EA	\$1.00	\$1.00
3	2 WEEK RENTAL - STRAINER, DEWATERING, 4"	2	EA	\$1.00	\$2.00
4	2 WEEK RENTAL - ADAPTER, 4" MALE CAMLOCK TO 4" RIGID HOSE	1	EA	\$1.00	\$1.00
<b>Total</b>					<b>\$6.00</b>

### Vendor Name

### Status

### Total Bid

[REDACTED]	Quotation Lines Selected	\$3,972.32
[REDACTED]	Regret	\$0.00

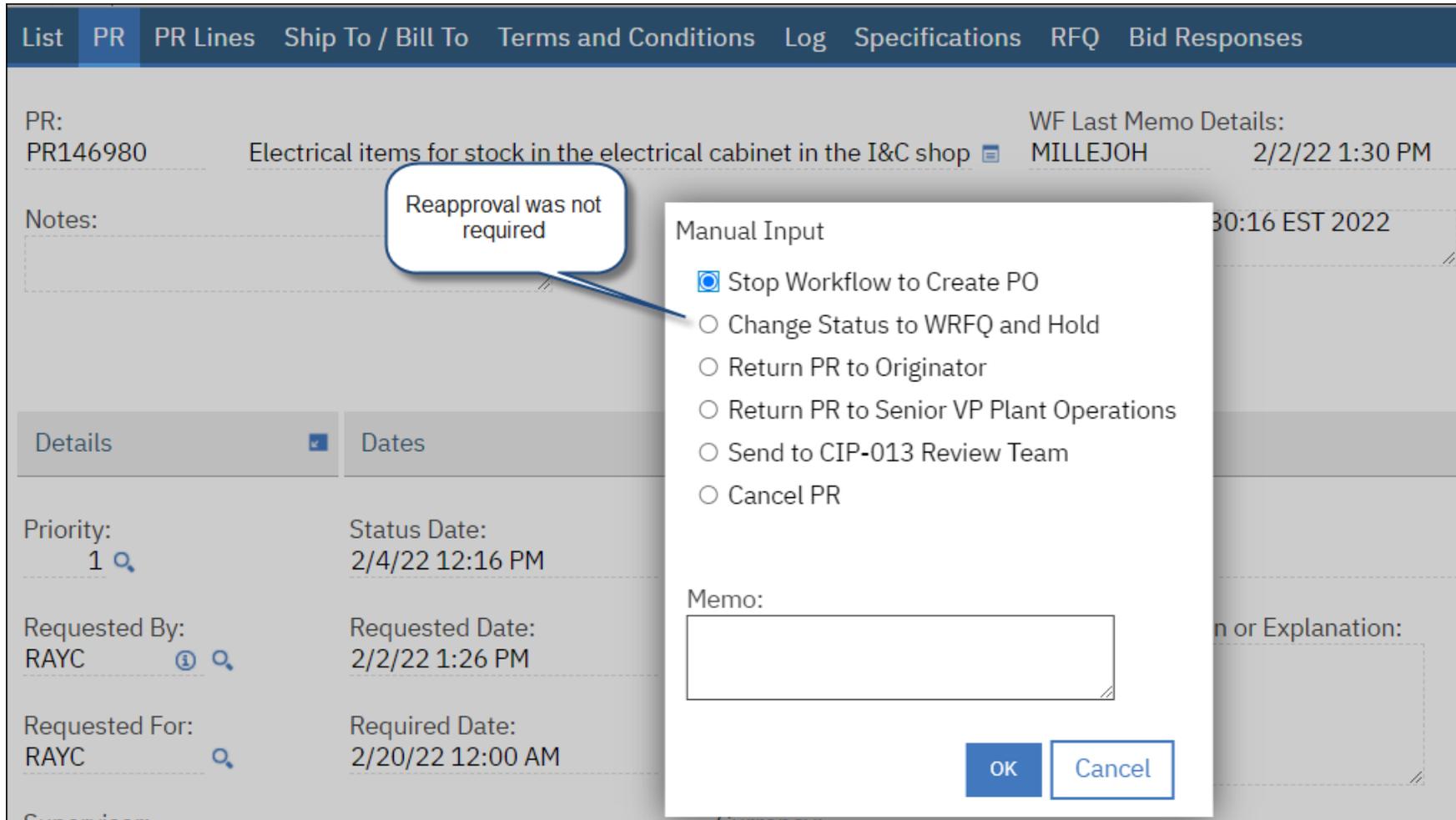
### Bid Line Details

Line #	Name	Unit Cost	Delivery Date	Supplier Remarks	Declined to Bid?	Low Bid	Proposed Awarded Bid	Bid and/or Quote	Bid/Quote Exception	Quote Total Cost
Line # 1: null										
	[REDACTED]	\$0.00								\$0.00
	[REDACTED]	\$1,200.00	8/24/22	4" diesel pump	No	Yes	Yes	LOWBID		\$2,400.00
Line # 2: null										
	[REDACTED]	\$0.00								\$0.00
	[REDACTED]	\$1,440.00	8/24/22		No	Yes	Yes	LOWBID		\$1,440.00
Line # 3: null										
	[REDACTED]	\$0.00								\$0.00
	[REDACTED]	\$33.08	8/24/22		No	Yes	Yes	LOWBID		\$66.16
Line # 4: null										
	[REDACTED]	\$0.00								\$0.00
	[REDACTED]	\$66.16	8/24/22		No	Yes	Yes	LOWBID		\$66.16

9/6/22 4:51 PM

# Sample RFQ: Inventory Items/Materials

Workflow PR for approval evaluation. Maximo sends to approvers if re-approval is required based on price changes.



The screenshot shows a Maximo PR (Purchase Request) record for PR146980. The PR description is "Electrical items for stock in the electrical cabinet in the I&C shop". The status is "MILLEJOH" and the last memo details are "2/2/22 1:30 PM". A callout bubble points to the PR description with the text "Reapproval was not required". A "Manual Input" dialog box is open, showing the following options:

- Stop Workflow to Create PO
- Change Status to WRFQ and Hold
- Return PR to Originator
- Return PR to Senior VP Plant Operations
- Send to CIP-013 Review Team
- Cancel PR

The dialog box also includes a "Memo:" field and "OK" and "Cancel" buttons. The background interface shows various tabs like "List", "PR Lines", "Ship To / Bill To", "Terms and Conditions", "Log", "Specifications", "RFQ", and "Bid Responses". Other fields visible include "Priority: 1", "Status Date: 2/4/22 12:16 PM", "Requested By: RAYC", "Requested Date: 2/2/22 1:26 PM", and "Required Date: 2/20/22 12:00 AM".

# Sample RFQ: Inventory Items/Materials

## Before and after cost comparison

PR: PR150894 + Purchase Folding shelves to attach to new Transformer monito 

WF Last Memo Details:

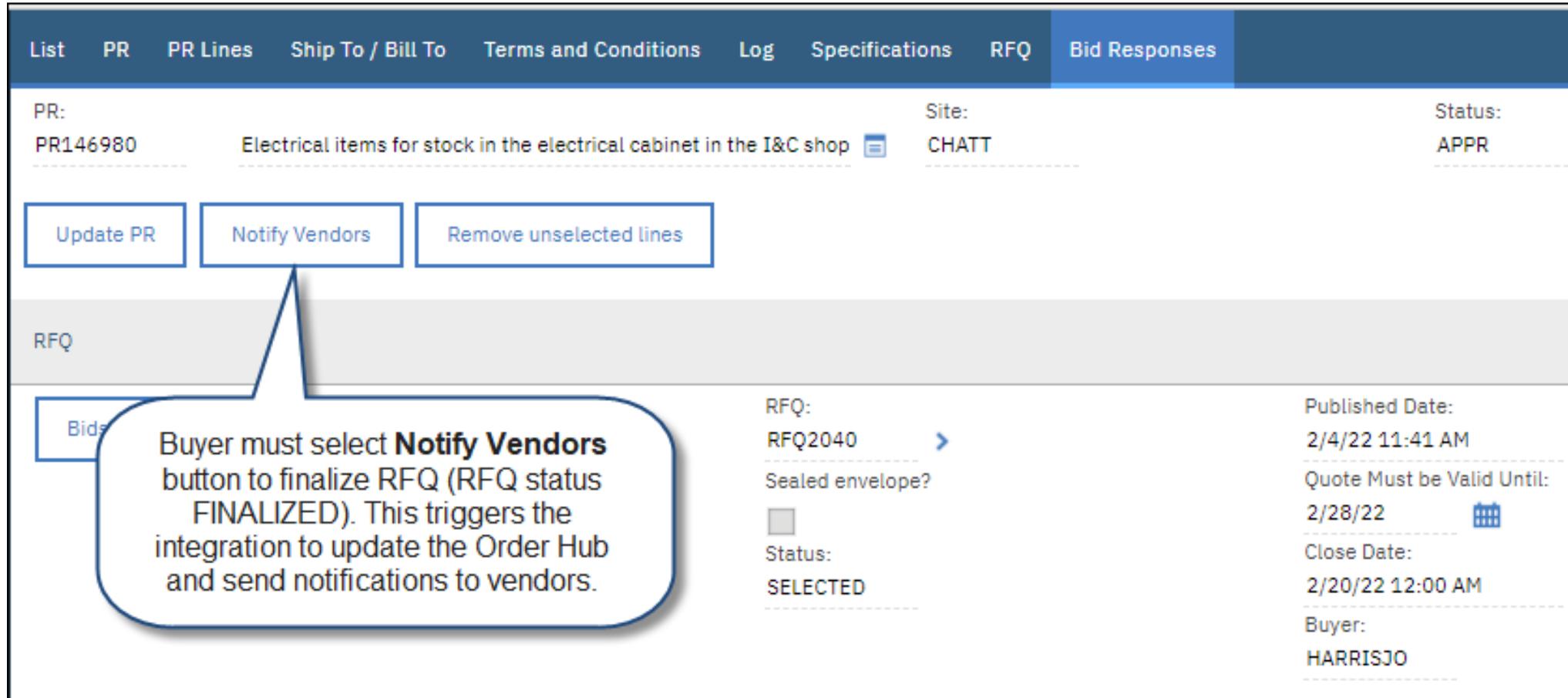
Notes:

Details 	Dates 	Costs 	Bid/Quote
<b>+ Priority:</b> 1 	Status Date: 5/4/22 3:19 PM 	Pretax Total: 2,638.2600	Bid and/or Quote: 
Requested By: MILLERN  	Requested Date: 4/1/22 8:26 AM 	Total Tax: 0.0000	Bid/Quote Exception or Explanation:
<b>+ Requested For:</b> MILLERN 	<b>+ Required Date:</b> 4/4/22 8:26 AM 	<b>Total Cost:</b> 2,638.2600	
Supervisor: _____ 		Currency: USD 	
Contract Reference: _____ 		<b>Total Cost before RFQ:</b> 2,727.2400	

Original total cost before RFQ and the new total cost after updating the PR with awarded bid.

# Sample RFQ: Inventory Items/Materials

Next, send award/regret notifications and finalize the RFQ



The screenshot displays a procurement system interface with the following elements:

- Navigation Bar:** List, PR, PR Lines, Ship To / Bill To, Terms and Conditions, Log, Specifications, RFQ, Bid Responses.
- PR Information:**
  - PR: PR146980
  - Description: Electrical items for stock in the electrical cabinet in the I&C shop
  - Site: CHATT
  - Status: APPR
- Action Buttons:** Update PR, Notify Vendors, Remove unselected lines.
- RFQ Details:**
  - RFQ: RFQ2040
  - Sealed envelope?
  - Status: SELECTED
  - Published Date: 2/4/22 11:41 AM
  - Quote Must be Valid Until: 2/28/22
  - Close Date: 2/20/22 12:00 AM
  - Buyer: HARRISJO
- Callout Box:** Buyer must select **Notify Vendors** button to finalize RFQ (RFQ status FINALIZED). This triggers the integration to update the Order Hub and send notifications to vendors.

# Sample RFQ: Inventory Items/Materials

The Create PO(s) button is now available.

The screenshot displays the 'PR' (Purchase Request) details for PR146983. The interface includes tabs for 'List', 'PR Lines', 'Ship To / Bill To', 'Terms and Conditions', 'Log', 'Specifications', 'RFQ', and 'Bid Responses'. The main content area shows details for the PR, including the description 'Electrical items for stock in the electrical cabinet in the I&C shop', the site 'CHATT', and the status 'APPR'. A 'Create PO(s)' button is highlighted with a callout box that says 'Use the **Create PO(s)** button to create PO's'. A system message dialog is also visible, stating 'System Message: BMXZZ7125I - Successfully created PO's: 122002 for 80717;'. The dialog has an 'OK' button.

Details	Dates	Costs	Bid/Quote
Priority: 1	Status Date: 2/4/22 12:48 PM	Pretax Total: 390.0000	Bid and/or Quote:
Requested By: RAYC	Requested Date: 2/3/22 2:35 PM	Total Tax: 0.0000	Bid/Quote Exception or Explanation:
Requested For: RAYC	Required Date: 2/10/22 12:00 AM	Total Cost: 390.0000	
Supervisor:		Currency: USD	
Contract Reference:		Total Cost before RFQ: 420.3000	
Contract Type:			
Contract Revision:			
Accrual:			
Vendor Invoice Number:			

# Awarded Notification

Awarded Quotation Lines Yahoo/Inbox ★

**maximoportal@prozone.rs**  
To: jovanovic\_biljana@yahoo.ca Tue., Oct. 12, 2021 at 5:53 p.m. ★

Dear INGERSOLL-RAND COMPANY,  
We inform you that we accepted your quotations on the RFQ #RFQ1058

< << >> >

E-mail notification

The Order Hub - Development 87026.Admin  
Welcome, MATT WILEMON

REQUEST FOR QUOTATION

RFQ #: RFQ1058

← BACK  
REPORT A TECHNICAL ISSUE

State History

Show 10 entries

Date	From	To	Status	Description	Subject
10/19/2021 12:01	opcmaximohelp@opc.com	jovanovic_biljana@yahoo.ca	AWARDED	Buyers organization awarded quote per lines ()	Awarde
10/19/2021 11:41	jovanovic_biljana@yahoo.ca	IT00121C@HAS_NO_EMAIL.GASOC.com	SENT	Vendor 87026 submitted quotations.	Bid Subr
10/19/2021 11:39	jovanovic_biljana@yahoo.ca	IT00121C@HAS_NO_EMAIL.GASOC.com	SENT	Vendor has applied for the RFQ.	RE: RFC
10/19/2021 11:21	opcmaximohelp@opc.com	jovanovic_biljana@yahoo.ca	SENT	Buyer send RFQ to Vendors.	New RFC

Showing 1 to 4 of 4 entries

Event Log record

Message

To: jovanovic\_biljana@yahoo.ca

From: opcmaximohelp@opc.com

Subject: Awarded Quotation Lines

Message

Dear INGERSOLL-RAND COMPANY,  
We inform you that we accepted your quotations on the RFQ #RFQ1058

Show 10 entries

Id	Name	Description	Type	Synced?	Actions
No data available in table					

Showing 0 to 0 of 0 entries

CANCEL

# Awarded RFQs – Winning Vendors

The Order Hub - Development  
Welcome, MATT WILEMON 87026.Admin

REQUEST FOR QUOTATION

RFQ #: RFQ1058

← BACK  
REPORT A TECHNICAL ISSUE

DETAILS | TERMS & CONDITIONS | EVENT LOG | ATTACHMENTS (0) | VENDOR ATTACHMENTS (0)

**Buyer Information**

Name: Oglethorpe Power  
Address: OPC, OPC,WI, 5461211  
E-mail: IT00121C@HAS\_NO\_EMAIL.GASOC.com  
Contact name: Biljana Jovanovic  
Phone:

EXPIRED

**Status & Dates**

Publish Date: 10/19/2021 11:18 | Close Date: 10/29/2021 00:00 | **Status: SELECTED**

Pre-Bid Meeting Date/Time: | Pre-Bid Meeting Location:

Confirmed/Rejected Date: 10/19/2021 11:39 | Confirmed/Rejected Comment: Confirmed.

Quote Submitted Date: 10/19/2021 11:41 | Quote Must be valid until: 10/30/2021

The lines below in Blue have been awarded to your company.

**General Terms**

This is a RFQ for a one time purchase

Payment Terms: | Freight Terms:

Ship Via: | Fob Point:

Currency: USD

Quote #: Q#12345 | Quote Valid Until: 10/28/2021

Description: Demo requisition

**RFQ Lines**

Show 10 entries

Awarded Lines

Line number	Item	Description	Manufacturer	Model #	Quantity	UOM	Vendor Price	Not bidding on line	Actions
1	64341	CAMERA, MICRO DOME, PANASONIC P/N: WV-S3531L	108028	WV-S3531L	2	EACH	60.0000	No	
Vendor:		CAMERA, MICRO DOME, PANASONIC P/N: WV-S3531L							
2	64667	FACE COVERING, LARGE, SHEMA 97, PANDEMIC SUPPLY, FOR USE AT GENERATING FACILITIES ONLY	MANF12	Model10	10	EACH	18.0000	No	
Vendor:	C123	FACE COVERING, LARGE, SHEMA 97, PANDEMIC SUPPLY, FOR USE AT GENERATING FACILITIES ONLY							
3		SOME MATERIAL DESCRIPTION			50	EACH	2.0000	No	
Vendor:		SOME MATERIAL DESCRIPTION							
4		MATERIAL DESCRIPTION 2			100	EACH	3.0000	No	
Vendor:		MATERIAL DESCRIPTION 2							

Showing 1 to 4 of 4 entries

# Awarded RFQs – Regret Vendors

The Order Hub - Development  
Welcome, MATT WILEMON 87026.Admin

REQUEST FOR QUOTATION

RFQ #: RFQ1260

← BACK  
REPORT A TECHNICAL ISSUE

DETAILS    TERMS & CONDITIONS    EVENT LOG    ATTACHMENTS (1)    VENDOR ATTACHMENTS (0)

### Buyer Information



**Name**  
Oglethorpe Power

**Address:** OPC, OPC, WI, 5461211  
**E-mail:** [opcmaximohelp@opc.com](mailto:opcmaximohelp@opc.com)  
**Contact name:** Ricardia Brutus  
**Phone:** 1770-270-7058

EXPIRED

### Status & Dates

<b>Publish Date</b> 12/06/2021 18:59	<b>Close Date</b> 12/13/2021 18:58	<b>Status</b> REGRET
<b>Pre-Bid Meeting Date/Time</b> [ ]	<b>Pre-Bid Meeting Location</b> [ ]	
<b>Confirmed/Rejected Date</b> 12/07/2021 07:44	<b>Confirmed/Rejected Comment</b> Reason for decline	
<b>Quote Submitted Date</b> [ ]	<b>Quote Must be valid until</b> 12/31/2021	

Regrets. No lines have been awarded to your company.

### General Terms

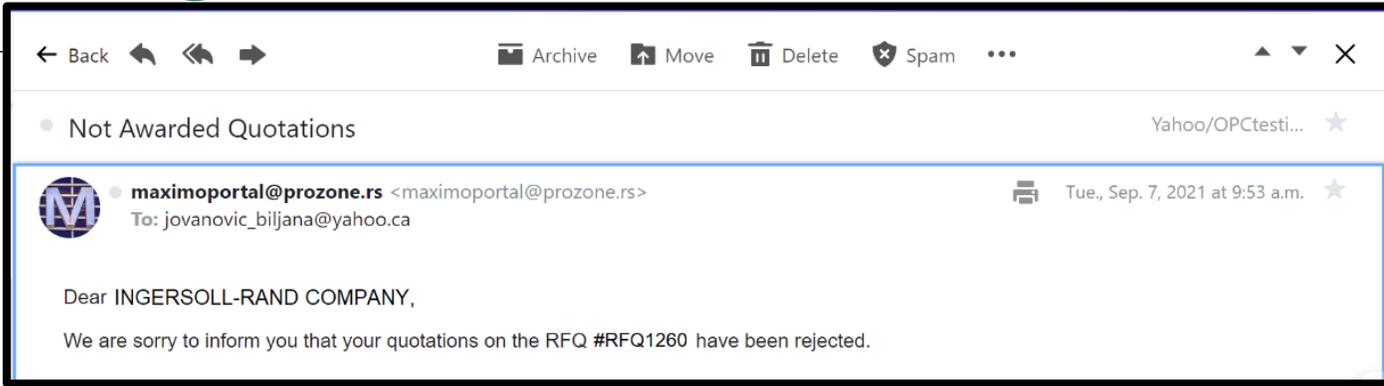
This is a RFQ to set up a Contract with you, for the specified anticipated quantities, over the period 12/20/2021 to 12/31/2021

<b>Payment Terms</b> [ ]	<b>Freight Terms</b> [ ]
<b>Ship Via</b> [ ]	<b>Fob Point</b> [ ]
<b>Currency</b> USD	
<b>Quote #</b> [ ]	<b>Quote Valid Until</b> [ ]

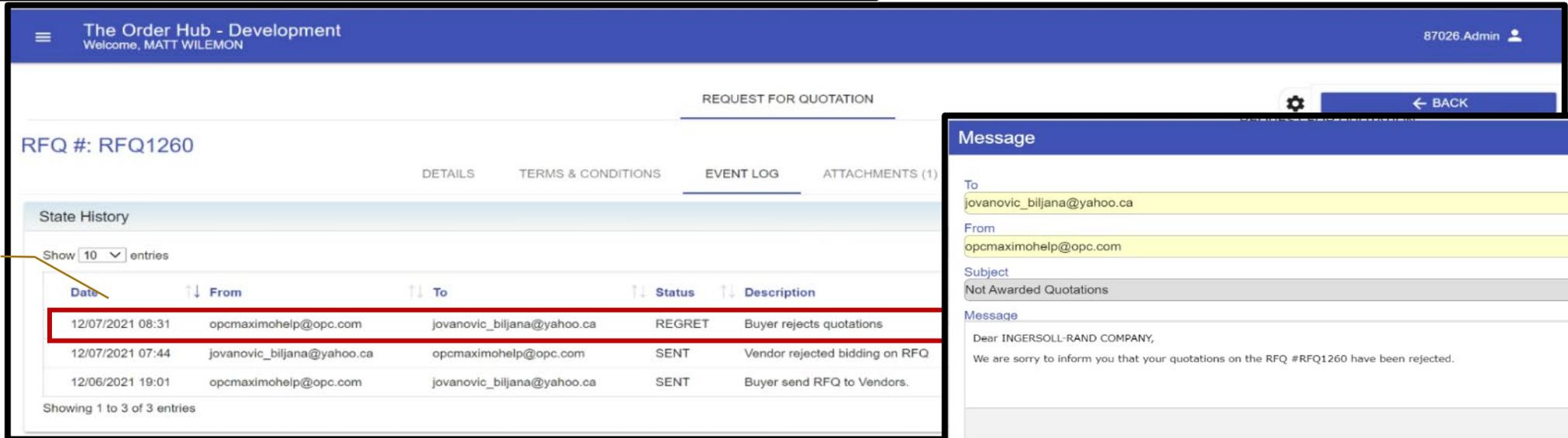
**Description**  
Order hub test spec char

REGRET message and RFQ status change to REGRET

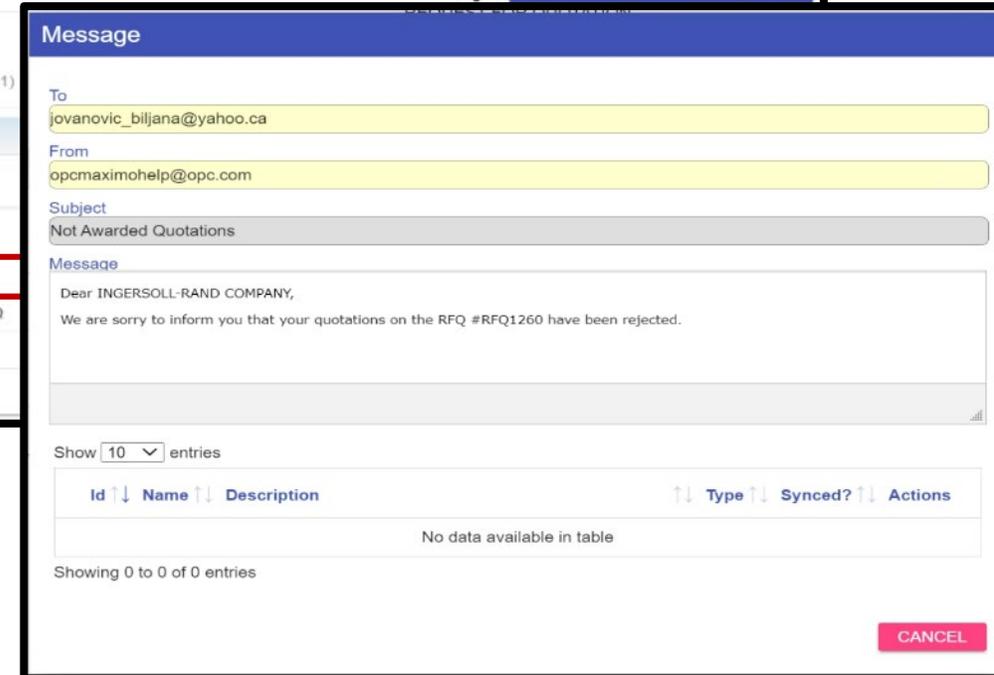
# Regret Notification



E-mail notification



Event Log record



# RFQ for Services Contracts

In the past, our Services RFQ's were done in one system and then once evaluated and awarded, the contract was created in Maximo.

- The requestor emailed the Contract Agent details, specs and bidders list.
- The Contract agent sent the RFQ (in an external sourcing tool) to contractors isolated from the requester
- Evaluated and sent to Requestor, who made award decision and then started the Contract Process in Maximo.

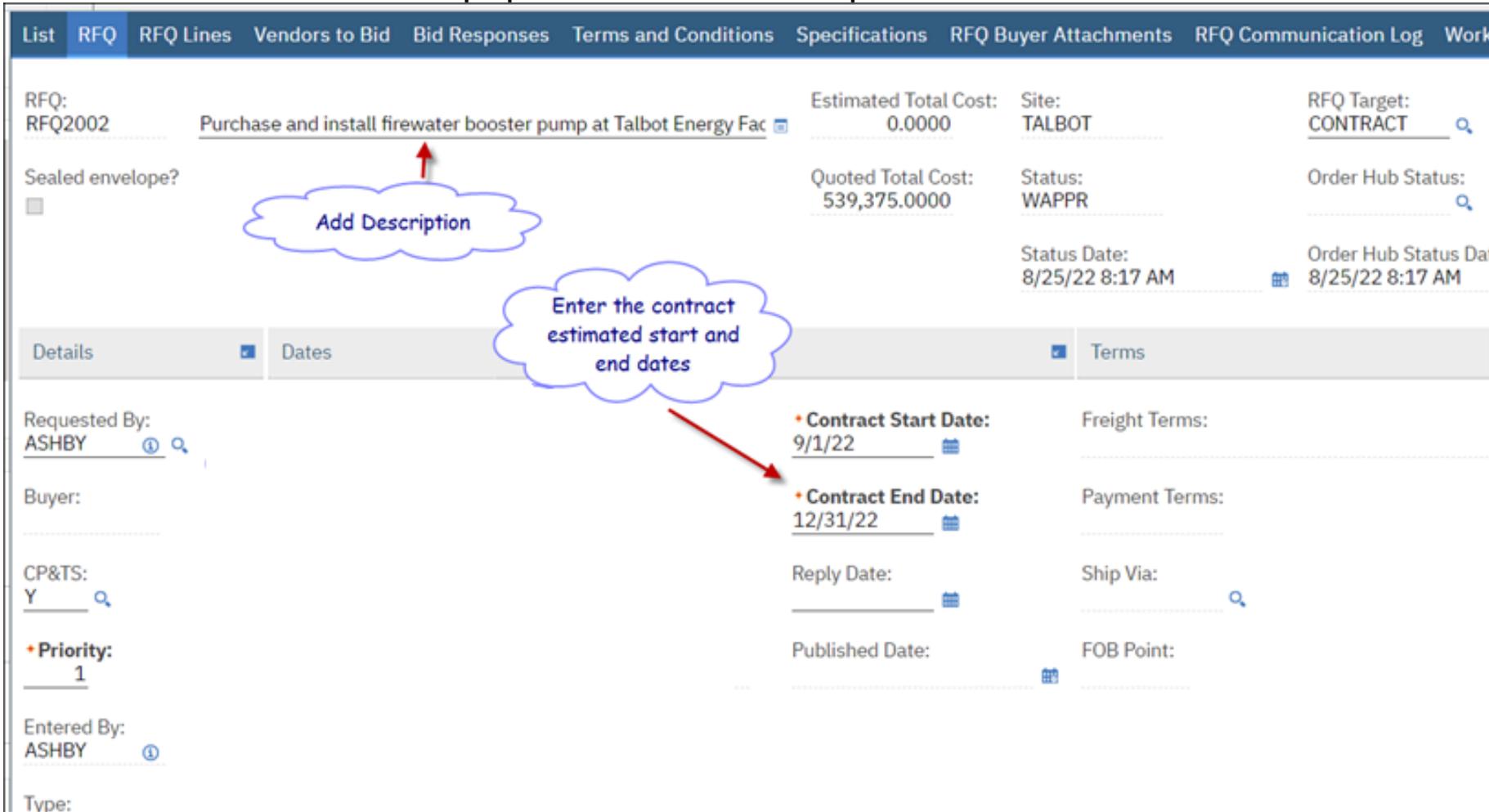
We wanted to combine this into one system (Maximo) so we changed our user's process.

- OPC Users determine they want something sent out for bid (based on OPC's Bid guidelines).
- The User (anyone in our system that has contracts creation security) creates an RFQ record in Maximo (RFQ Record Created)
- Adds a description and some other details
- User completes details of the RFQ lines

# Sample RFQ: Contracts

The User (Not Supply Chain) creates an RFQ

Most of the fields will auto-populate or are not required but there are a few that need to be completed



The screenshot shows an RFQ system interface with the following fields and annotations:

- RFQ:** RFQ2002
- Description:** Purchase and install firewater booster pump at Talbot Energy Fac (Annotated with a cloud: "Add Description" and an arrow pointing to the text)
- Estimated Total Cost:** 0.0000
- Site:** TALBOT
- RFQ Target:** CONTRACT
- Sealed envelope?:**
- Quoted Total Cost:** 539,375.0000
- Status:** WAPPR
- Status Date:** 8/25/22 8:17 AM
- Order Hub Status:** (with search icon)
- Order Hub Status Date:** 8/25/22 8:17 AM
- Details:**  **Dates:**  **Terms:**
- Requested By:** ASHBY (with search icon)
- Buyer:** (empty)
- CP&TS:** Y (with search icon)
- Priority:** 1
- Entered By:** ASHBY (with search icon)
- Type:** (empty)
- Contract Start Date:** 9/1/22 (Annotated with a cloud: "Enter the contract estimated start and end dates" and an arrow pointing to the date)
- Contract End Date:** 12/31/22 (Annotated with a cloud: "Enter the contract estimated start and end dates" and an arrow pointing to the date)
- Reply Date:** (empty)
- Published Date:** (empty)
- Freight Terms:** (empty)
- Payment Terms:** (empty)
- Ship Via:** (with search icon)
- FOB Point:** (empty)

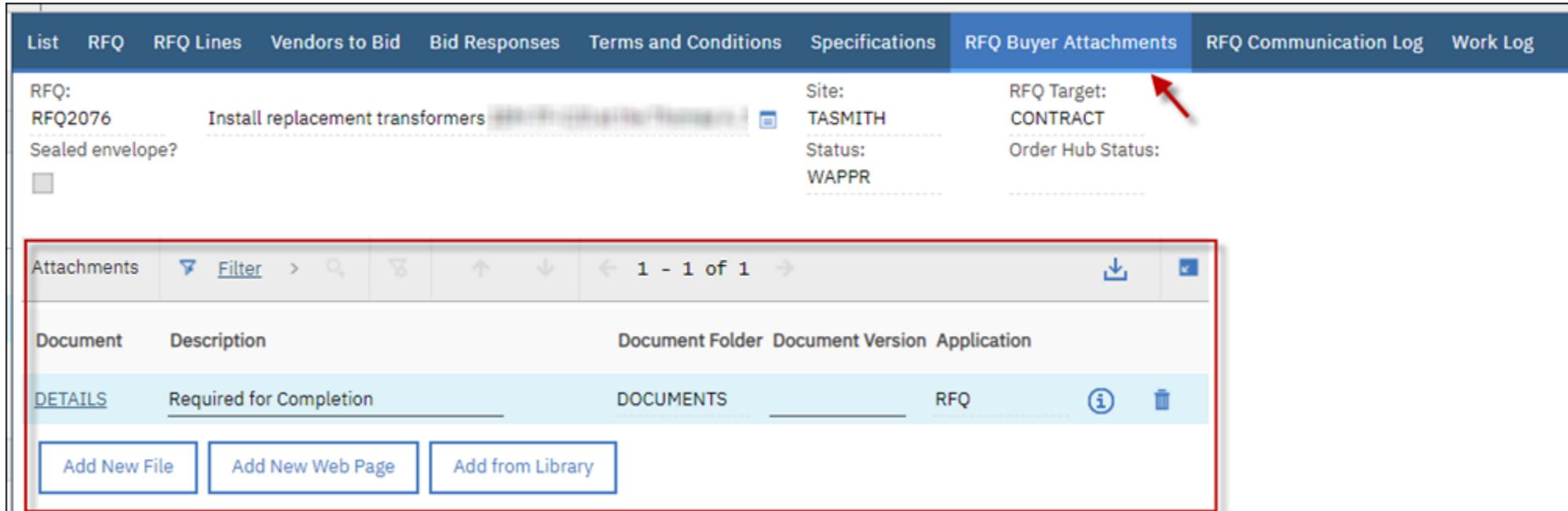
# Sample RFQ: Contracts

Next move to the “RFQ Lines” tab and enter the line details. This is “almost” the same as creating a task release line. Additional lines can be added as needed.

The screenshot displays the 'RFQ Lines' tab in a software application. At the top, there are navigation tabs: List, RFQ, RFQ Lines (selected), Vendors to Bid, Bid Responses, Terms and Conditions, Specifications, RFQ Buyer Attachments, RFQ Communication Log, and Work Log. Below the tabs, there is a summary section for the RFQ: RFQ2076, 'Install replacement transformers'. It shows 'Estimated Total Cost: 23,912.0000', 'Quoted Total Cost: 0.0000', 'Site: TASMITH', 'Status: WAPPR', 'RFQ Target: CONTRACT', and 'Order Hub St...'. Below this is a table of RFQ Lines with one line item. The line item has a dropdown arrow next to it, and a red arrow points to it with the annotation 'Open the line details'. The line item details are expanded below the table. The 'Line Item' section shows: Line: 1, Line Type: Service, Item: TRANSFORMER REMOVAL, INSTALLATION, AND TESTING. There are fields for 'Quantity: 1.0000', 'Order Unit: EA', 'Estimated Unit Cost: 23,912.0000', and 'Estimated Line Cost: 23,912.0000'. Red arrows point to these fields with annotations: 'Enter the quantity (generally this is 1) and order unit (EA)' pointing to quantity and order unit, and 'Enter the Estimated Unit Cost (the estimated line cost will calculate automatically)' pointing to the estimated unit cost. There are also fields for 'Manufacturer:', 'Model:', 'Category:', 'Commodity Group:', 'Commodity Code:', 'Classification:', and 'Class Description:'. A yellow box at the bottom right contains the text: 'The line details will be added to the Task Release at the end of the process.'

# Sample RFQ: Contracts

Attachments can be added on the “RFQ Buyer Attachments” tab



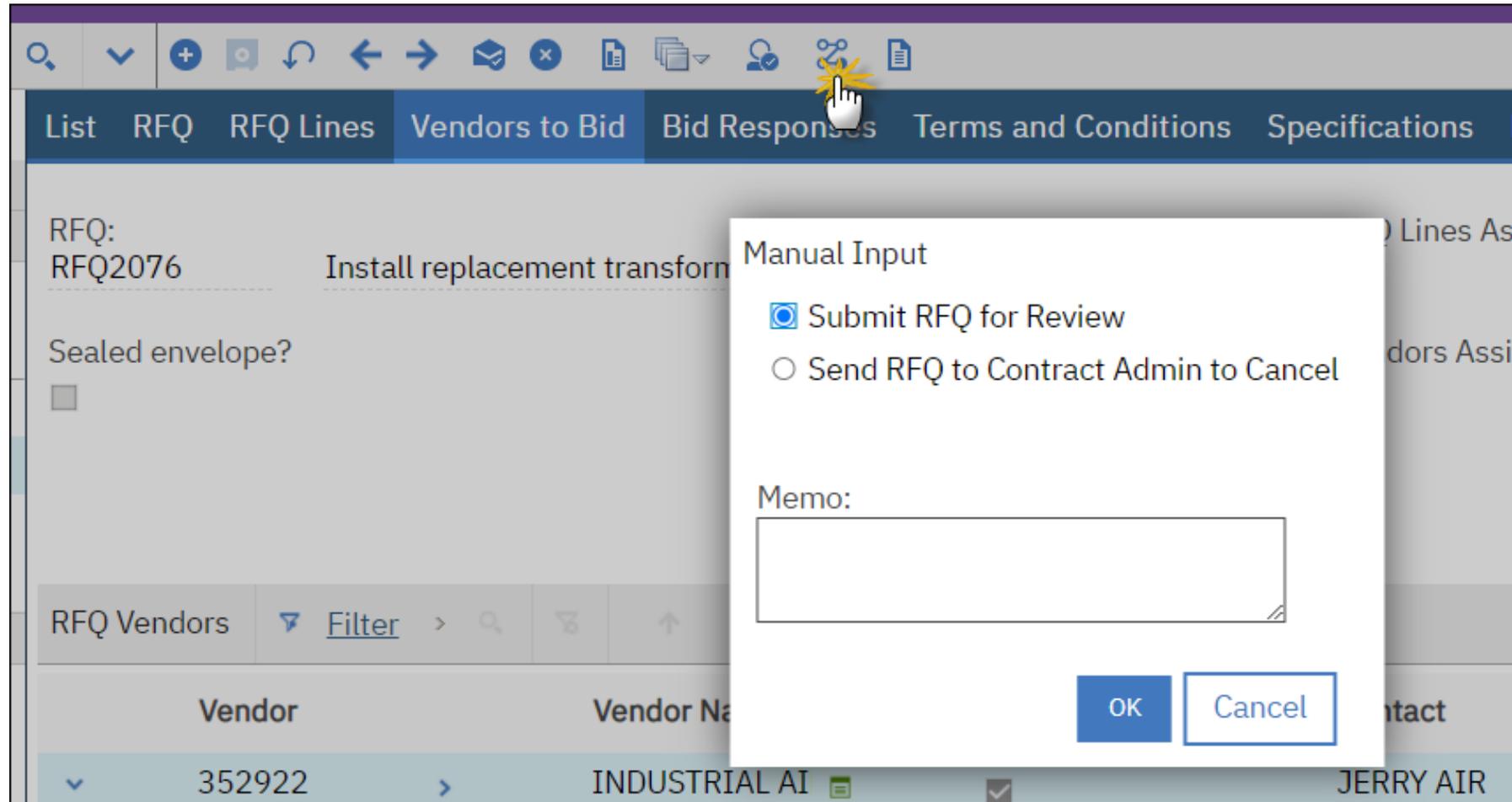
The screenshot shows the 'RFQ Buyer Attachments' tab selected in a software interface. The top navigation bar includes tabs for 'List', 'RFQ', 'RFQ Lines', 'Vendors to Bid', 'Bid Responses', 'Terms and Conditions', 'Specifications', 'RFQ Buyer Attachments', 'RFQ Communication Log', and 'Work Log'. The main content area displays RFQ details: RFQ ID 'RFQ2076', description 'Install replacement transformers', Site 'TASMITH', Status 'WAPPR', RFQ Target 'CONTRACT', and Order Hub Status. A red arrow points to the 'RFQ Buyer Attachments' tab. Below the details is a table of attachments with columns for Document, Description, Document Folder, Document Version, and Application. One attachment is listed: 'Required for Completion' in the 'DOCUMENTS' folder, version 'RFQ'. Below the table are three buttons: 'Add New File', 'Add New Web Page', and 'Add from Library'.

Document	Description	Document Folder	Document Version	Application
DETAILS	Required for Completion	DOCUMENTS	RFQ	

These attachments are sent to all vendors on the RFQ when the RFQ is sent to the vendors

# Sample RFQ: Contracts

Once vendors are added, click the Route Workflow icon to submit the RFQ



The screenshot displays a software interface for managing an RFQ. The top navigation bar includes tabs for 'List', 'RFQ', 'RFQ Lines', 'Vendors to Bid', 'Bid Responses', 'Terms and Conditions', and 'Specifications'. A toolbar above the tabs contains various icons, including a 'Route Workflow' icon (a person with a starburst) which is being clicked. A 'Manual Input' dialog box is open, featuring two radio button options: 'Submit RFQ for Review' (selected) and 'Send RFQ to Contract Admin to Cancel'. Below these options is a text area labeled 'Memo:'. At the bottom of the dialog are 'OK' and 'Cancel' buttons. The background interface shows the 'Vendors to Bid' tab with details for RFQ: RFQ2076, 'Install replacement transform', and a table of vendors including 'INDUSTRIAL AI' and 'JERRY AIR'.

# Sample RFQ: Contracts

RFQ is sent to Requestor's Supervisor for review and approval to send to Contract Agents

The screenshot shows a software interface for managing RFQs. The main window displays details for RFQ 2076, titled 'Install replacement transformers'. A modal window titled 'View Workflow Assignments' is open, showing a table of workflow assignments. The table has columns for 'Assigned Person Code', 'Name', 'Description', 'Process', and 'Rev'. One assignment is visible: 'RFQ Ready for your Review' with process 'RFQFLOW' and revision '5'. Below the table are buttons for 'View Workflow History', 'View Workflow Map', and 'OK'.

Assigned Person Code	Name	Description	Process	Rev
		RFQ Ready for your Review	RFQFLOW	5

# Sample RFQ: Contracts

The Contract Administrators complete the following steps:

- Adds the **Close Date** and **Quotes Valid Until date** and any pre-bid meeting information

List	RFQ	RFQ Lines	Vendors to Bid	Bid Responses	Terms and Conditions	Specifications	RFQ Buyer Attachments	RFQ Communication Log	Work Log	
RFQ:	RFQ2002	Smarr Painting Unit 2 - 2022			Estimated Total Cost:	250,000.0000	Site:	SMARR	RFQ Target:	CONTRACT
Sealed envelope?	<input checked="" type="checkbox"/>	Quoted Total Cost:	0.0000		Status:	SENT		Order Hub Status:	SENT	
		Status Date:	9/1/22 12:11 PM		Order Hub Status Date:	9/1/22 12:11 PM				
Details		Dates			Terms					
Requested By:	SAKACH	Close Date:	9/22/22 5:00 PM		Contract Start Date:	10/17/22		Freight Terms:		
Buyer:	BRUTUS	Quote Must be Valid Until:	12/31/22		Contract End Date:	12/31/22		Payment Terms:		
CP&TS:	N	Pre-Bid Meeting Date:	9/14/22 9:00 AM		Reply Date:			Ship Via:		
Priority:	0	Pre-Bid Meeting Location:	Smarr Energy Facility – 1077 Rumble Road Forsyth G/		Published Date:	9/1/22 12:11 PM		FOB Point:		
Entered By:	SAKACH									
Type:	Service Quote									

# Sample RFQ: Contracts

- ▶ Add/adjust vendors and assign RFQ lines to each vendor.
  - RFQ status **INPRG**
  - Vendor Quote status **DRAFT**

RFQ: RFQ2181 *Step 4 Contract Agent Sends to Vendors - Talbot Spine Transformer*

Sealed envelope?

RFQ In Progress

All RFQ Lines Assigned?

All Vendors Assigned?

Site: TALBOT

Status: INPRG

RFQ Target: CONTRACT

Order Hub Status:

View Unassigned Lines

Send to Vendors

Close Date:

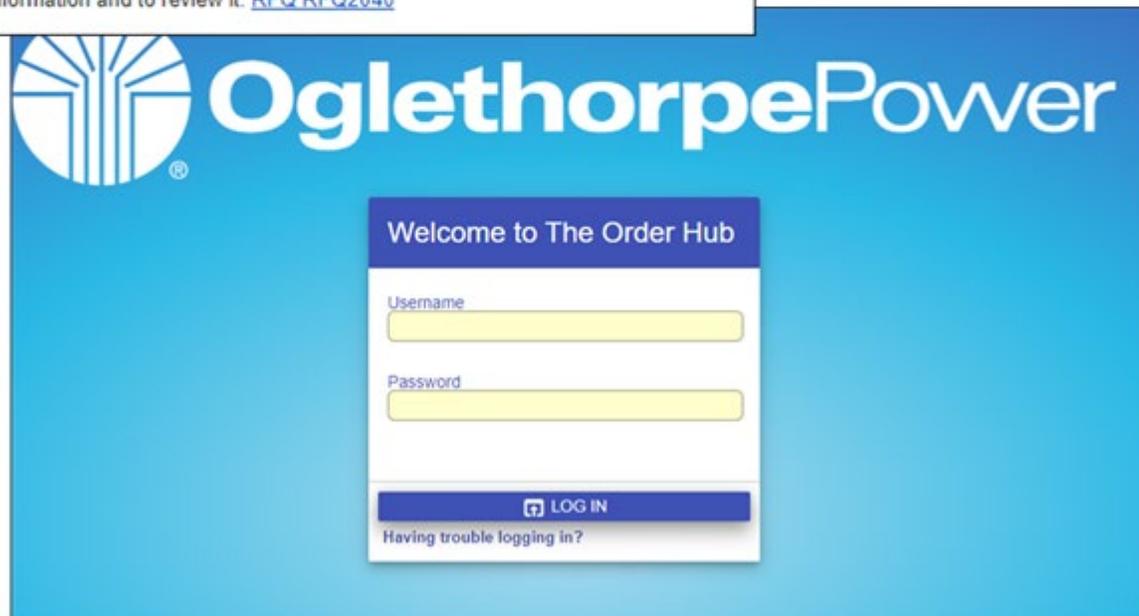
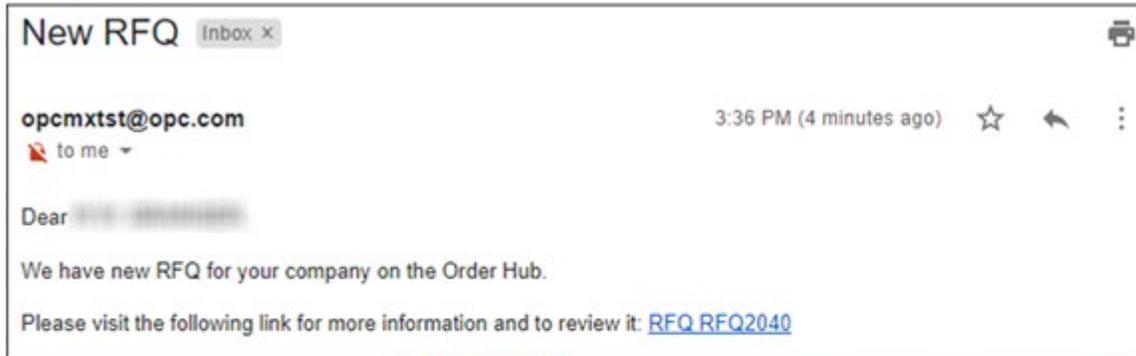
RFQ Vendors [Filter](#) > < 1 - 2 of 2 >

Vendor	Vendor Name	Order Hub Vendor?	Contact	Quote Status	Status Date	Lines Count
> 358916	> HANSEN ELECTRIC	<input checked="" type="checkbox"/>	JANE HANSEN	DRAFT	4/15/22 3:17 PM	0
> 359334	> MILLER MED	<input checked="" type="checkbox"/>	JIM MILLER	DRAFT	4/15/22 3:17 PM	0

Select Vendors Add Vendor Select Commodity Vendors

# Vendor Order Hub Screens

Each vendor's contact on the RFQ will be notified by Email. They use the Order Hub to process the quote.



# Sample RFQ: Contracts

Contract Agent sends RFQ back to the Requestor to review bids  
 RFQ Status **BIDSELECT**

**RFQ Details:**  
 RFQ: RFQ2076  
 Item: Install replacement transformers  
 Site: TASMETH  
 RFQ Target: CONTRACT  
 Status: BIDSELECT  
 Close Date: 2/25/22 12:00 AM

Line	Item	Not Awarding?	Vendor 1	Unit Cost	Awarded?	Vendor 2	Unit Cost	Awarded?	Vendor 3	Unit Cost	Awarded?	Vendor 4	Unit Cost
1	TRANSFORMER REMOVAL, INSTALLATION, AND TESTING; VALVES		Vendor 1	26,000.0000		Vendor 2	23,000.0000		Vendor 3	23,000.0000		Vendor 4	

**Annotations:**  
 - **Comparative Selection sub-tab:** Points to the 'Comparative Selection' tab.  
 - **Requester reviews all submitted bids on the "Comparative Selection" tab:** Points to the 'Comparative Selection' tab.  
 - **Lowest bid for the line:** Points to Vendor 1's bid of 26,000.0000.  
 - **No bid information because they declined to bid:** Points to Vendor 3's bid details, which are empty.

# Sample RFQ: Contracts

- ▶ Picks winning Bid and Enters Bid exception information

<p>Description: TRANSFORMER REMOVAL, INSTALLATION, AND TESTING</p> <p>Commodity Group: VALVES</p> <p>Manufacturer:</p> <p>Model:</p> <p>Required Date:</p> <p>Quantity: 1.0000</p> <p>Order Unit: EA</p> <p>Low Bid Unit Cost: 23,000.0000</p> <p>Not Awarding Line? <input type="checkbox"/></p>	<p>Description: TRANSFORMER REMOVAL, INSTALLATION, AND TESTING</p> <p>Catalog #:</p> <p>Manufacturer:</p> <p>Model:</p> <p>Delivery Date: 4/1/22</p> <p>Quantity: 1.0000</p> <p>UOM: EA</p> <p>Unit Cost: 26,000.0000</p> <p>Supplier Remarks:</p> <p>Asked to Bid? <input checked="" type="checkbox"/></p> <p>Declined to Bid? <input type="checkbox"/></p> <p>Awarded? <input checked="" type="checkbox"/></p> <p>Bid and/or Quote:</p> <p>Bid/Quote Exception or Explanation:</p>	<p>Description: TRANSFORMER REMOVAL, INSTALLATION, AND TESTING</p> <p>Catalog #:</p> <p>Manufacturer:</p> <p>Model:</p> <p>Delivery Date: 4/1/22</p> <p>Quantity: 1.0000</p> <p>UOM: EA</p> <p>Unit Cost: 23,000.0000</p> <p>Supplier Remarks:</p> <p>Asked to Bid? <input checked="" type="checkbox"/></p> <p>Declined to Bid? <input type="checkbox"/></p> <p>Awarded? <input type="checkbox"/></p> <p>Bid and/or Quote:</p> <p>Bid/Quote Exception or Explanation:</p>
---	--	---

*Check the Awarded flag to accept the bid*

*Enter bid exception information*

# Sample RFQ: Contracts

Request for Quote Details Report										
RFQ1422: Batteries Replacement at the Effingham Energy Facility										
Site: EFFINGHA			Required Date:			Est. Total Cost: \$679,163.00				
Requested By: Matt Luchner			Requested Date: 4/12/22							
Status: QUOTAPPR			Sealed Bid: Yes							
RFQ Line Details										
Line	Description	Quantity	Order Unit	Est. Unit Cost	Est. Line Cost					
1	BATTERY	1	DOLLAR	\$240,464.00	\$240,464.00					
2	BATTERY	1	DOLLAR	\$156,008.00	\$156,008.00					
3	BATTERY	1	DOLLAR	\$156,008.00	\$156,008.00					
4	BATTERY	1	DOLLAR	\$126,683.00	\$126,683.00					
				<b>Total</b>	<b>\$679,163.00</b>					
Vendor Name										
				Status	Total Bid					
				Regret	\$690,883.00					
				Regret	\$0.00					
				Quotation Lines Selected	\$445,925.00					
Bid Line Details										
Line # 1: null										
Name	Unit Cost	Delivery Date	Supplier Remarks	Declined to Bid?	Low Bid	Proposed Awarded Bid	Bid and/or Quote	Bid/Quote Exception	Quote Total Cost	
	\$0.00								\$0.00	
	\$223,935.00	10/7/22		No					\$223,935.00	
	\$175,583.00	10/21/22	\$207,607.00 - includes eagle eye - equip-install-comm. Note in body of quote additional charge required if you need 750 MCM Battery cables the estimated 85 feet to the panel	No	Yes	Yes	LOWBID		\$175,583.00	
Line # 2: null										
Name	Unit Cost	Delivery Date	Supplier Remarks	Declined to Bid?	Low Bid	Proposed Awarded Bid	Bid and/or Quote	Bid/Quote Exception	Quote Total Cost	
	\$0.00								\$0.00	

# Sample RFQ: Contracts

- ▶ Use the “Create Task Release” button from Bid Response tab to award to vendor. The Autonumber button is used to generate the contract number.

The screenshot shows the IBM RFQ system interface for a Request for Quotation (RFQ) titled "Install replacement transformers". The status is "FINALIZED". The interface displays a table of vendor responses with the following data:

* Sequence	Vendor	Vendor Name	Order Hub Vendor?	Contact	Quote Status	Status Date
1	233569		✓	NANCY CONTR	SELECTED	2/16/22 3:53 PM
2	352922		✓	JERRY AIR	REGRET	2/16/22 3:53 PM
3	358916		✓			2/16/22 3:53 PM

The "Create Contract" dialog box is open, showing the following details:

- Contract: C9608
- Contract Type: Task Release
- Autonumber button is highlighted.

Annotations in the image include:

- A cloud labeled "Award and Regret notifications sent to vendors" pointing to the "Quote Status" column.
- A cloud labeled "Create Contract" pointing to the "Create Contract" button.

# Issues Experienced

- Vendor quantity entered quote was not updating Maximo PR required quantity. (Resolved)
- Integration password change was preventing retrieval of quotations for a sealed bid RFQ (Resolved)
- RFQ's on Order Hub mixing up data if vendor had two browser sessions open (Resolved)
- Comm logs sent from Maximo were not visible on the Order Hub for admin access (Resolved)
- Maximo sending RFQ data to the Order Hub when PO or contract is canceled and RFQ is reopened causing integration errors (Resolved)
- Order Hub RFQ vendor attachments missing in Maximo due to vendor attachment that had an “invalid” character in the file name. (Resolved)
- Temporarily unable to add Multiple Attachments at one time on Maximo RFQ (Resolved)
- Site ID is changing when creating a purchase contract revision (Resolved)
- Create a notification that will be sent to vendors used on RFQ's. This is in progress and will be completed by OPC.
- Order Hub Vendor should not be marked in Maximo as Order Hub vendor if setup on OH is not complete. P2Insight to provide a fix.

# Opportunities in OPC

- Get more Vendors onto Order Hub
  - OPC Requirement: If bidding, **MUST BE ON HUB**
- Lower Bid Requirement Threshold for OPC
  - When bids are required (>\$50K), 100% usage by Contract Agent
  - When bids are required (>\$10k), not all buyers utilizing Order Hub
- Use Order Hub to secure a quote, not just to competitively bid.
  - **Old habits are HARD TO BREAK!!**
- Allow the same vendor email for multiple companies to support regional/divisions.
- Add ability to clone Order Hub from PROD to have up to date data in the DEV Order Hub for testing.
- Create visibility of Order Hub Contacts in Maximo.
  - **Contacts are not synchronized at OPC request because we don't OH to update our contacts.**
- Investigate expanded Order Hub functionality

# Further Opportunities using P2Insight

- **Still opportunities beyond what is being use**



But, in reality, most Asset Managers are disconnected from their Suppliers, Vendors & Contractors...

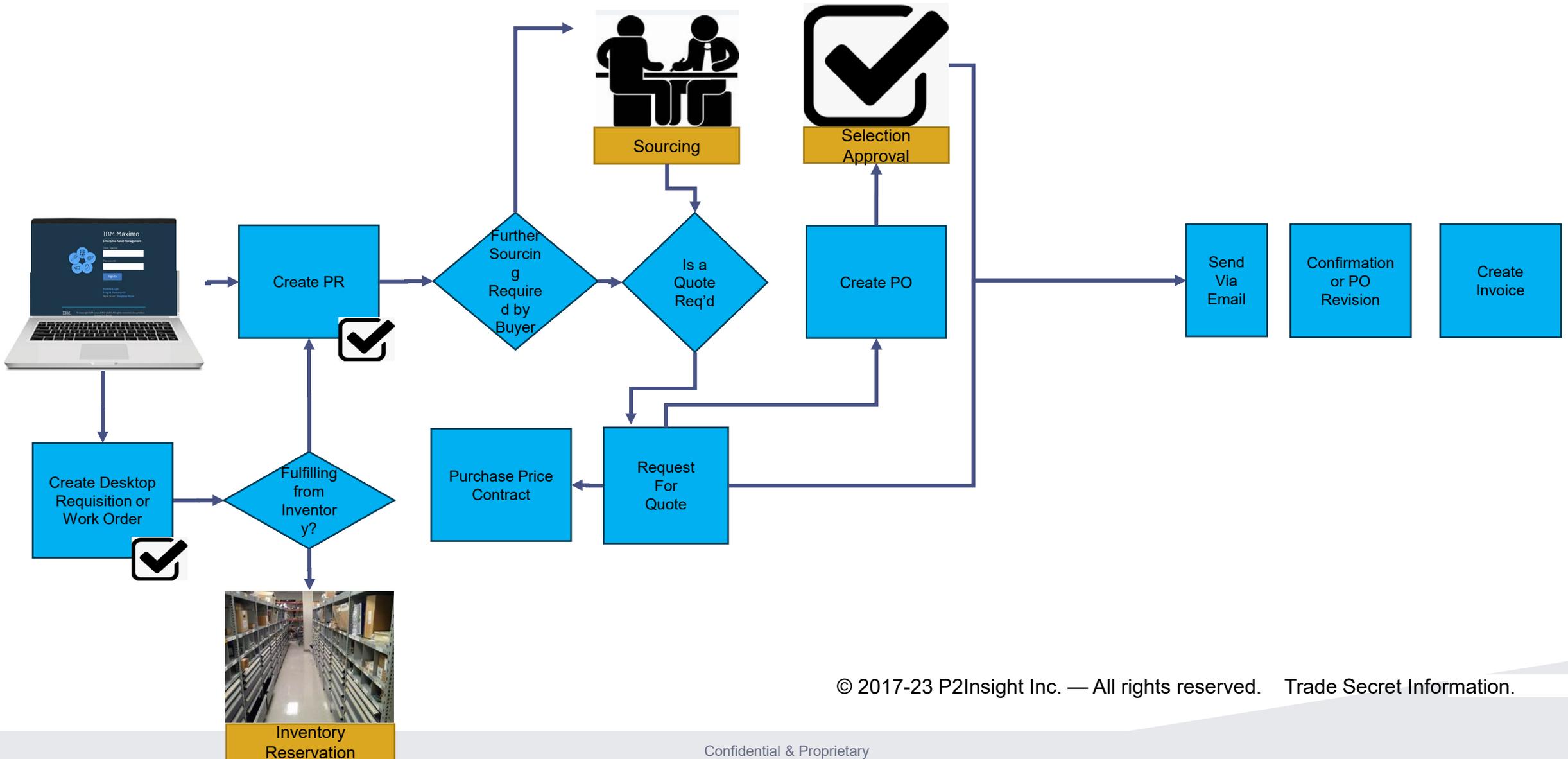


# OPC started with one of two of the most common first step with e-commerce

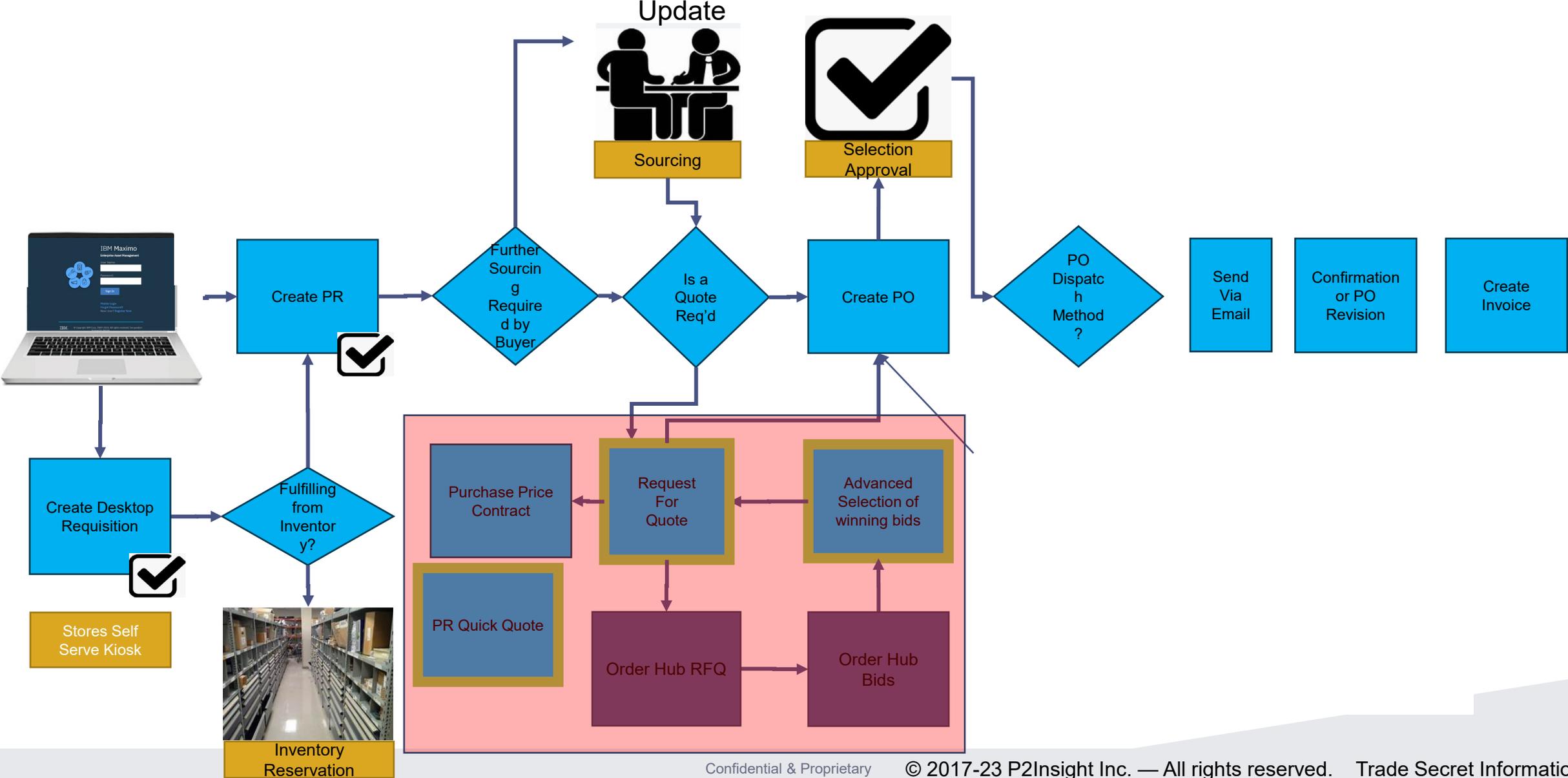
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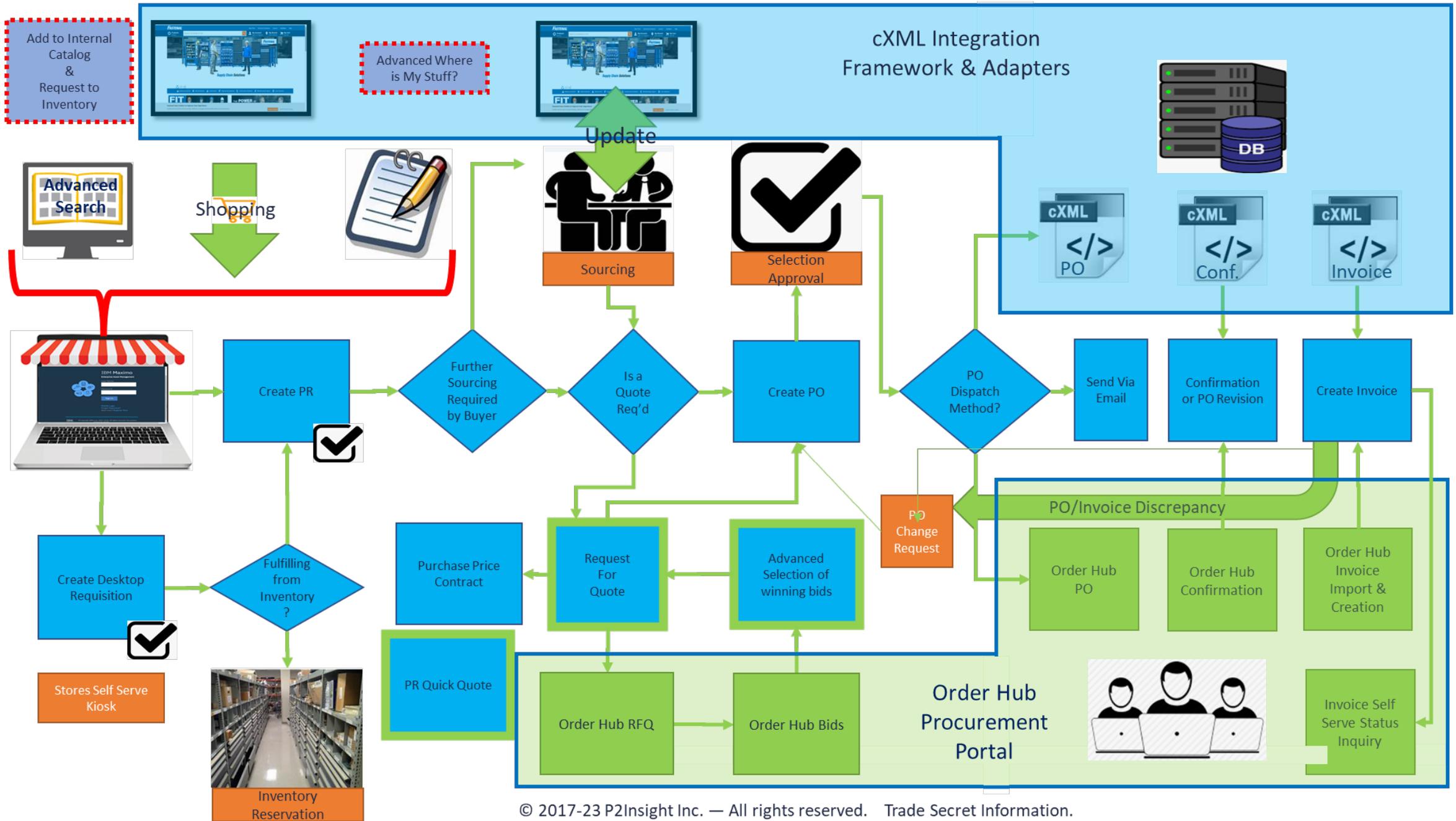
- ▶ Request for Quotations – most companies need a fast and easy way to get quotes for parts and services, for one-off PO's and/or Contracts
- ▶ The other is... Punchout Catalog Shopping direct from Maximo WO or PR applications

# This is base Maximo...



# OPC Deployment...





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## If More Info Needed

- **Contact Information**

- **Cristy Bennett (General Info)**
- **Norris Minnis (Contracts)**
- **Brad VanNote (Materials)**
- **Tyler Lyon (IT Maximo Supv)**

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[brad.vannote@opc.com](mailto:brad.vannote@opc.com)

[tyler.lyon@gasoc.com](mailto:tyler.lyon@gasoc.com)

- **P2Insight Contact**

- **Mike Popovic (President)**

[mike.popovic@P2insight.com](mailto:mike.popovic@P2insight.com)



# Maximo in Southwest Florida

# Presenters



Amy Tatum, Starboard Consulting



Ethan Croop, Southwest Florida  
International Airport

# Lee County Port Authority

LCPA owns and operates two airports in Fort Myers, FL



Southwest Florida International Airport



Page Field

# Southwest Florida International Airport

Consists of:

- A single 12,000 foot runway
- 800,000 square foot terminal
  - 27 passenger boarding bridges
  - In-line baggage handling system
- Parking lots
- Air cargo and freight
- Fixed based operator
- 13,555 acres



# Maintaining RSW

The Maintenance Department at RSW consists of:

- 108 professionals
  - 38 - terminal building
  - 38 - airfield and grounds
  - 9 - security systems
  - 8 - fleet and equipment
  - 4 - inventory management
  - 2 - contract management
  - 2 - CMMS
  - 7 - Administration and Sr. leadership



# Maintaining RSW



- 108 professionals
  - 37 – Senior Tradesworkers
  - 27 - Tradesworkers
  - 10 - Crew Chiefs
  - 10 - Supervisors
  - 6 - Senior Mechanics/Fabricator
  - 6 - Managers
  - 3 - Warehouse Specialist
  - 4 - Administrative Coordinators
  - 2 - Program Coordinators
  - 2 - Senior Managers
  - 1 - Director



# Maintaining RSW - Grounds

- Chemical application (fertilizer, herbicide, pesticide application)
- Irrigation
- 15 miles of fence line
- 18 acres of Floratam
- 40,000 irrigation heads
- Approximately 4,000 trees
- Parking lots
- Access Control and PID System
- Aquatic weed management



# Maintaining RSW - Terminal



## Main Terminal

- 27 PBB, PCA, GPU
- 54 Air Handlers
- 3 – 1,200 Ton Chillers
- 27,000 ft<sup>2</sup> RAC
- 75 Restrooms
- 31,000 ft<sup>2</sup> ARFF Station

# Maintaining RSW - Fleet

## Fleet and Equipment

- Fleet Vehicles - 115
- ARFF Apparatus – 8
- Carts – 22
- Generators – 11
- Lulls – 2
- Large Equipment – 6
- Tractors – 8
- Small Equipment – 100+



# Maintaining RSW - Security



## Systems

- 48 Access Control Panels
- 500 Badge Readers
- 550 Surveillance Cameras
- 62 Infrared Cameras
- 10 miles of PIDs

# Maintaining RSW - Airfield

One 12,000' Runway

Associated taxiways and ramp

- 3,259 airfield light fixtures
- 189 airfield guidesigns
- 26 airfield regulators and circuits
- 700,000 sq ft of airfield markings



# RSW and Maximo (the early years)

- Initial implementation in 2009
- Initially deployed to Crew Chiefs, Supervisors and Managers
- Purchases for materials and services used to complete work order were entered into Maximo

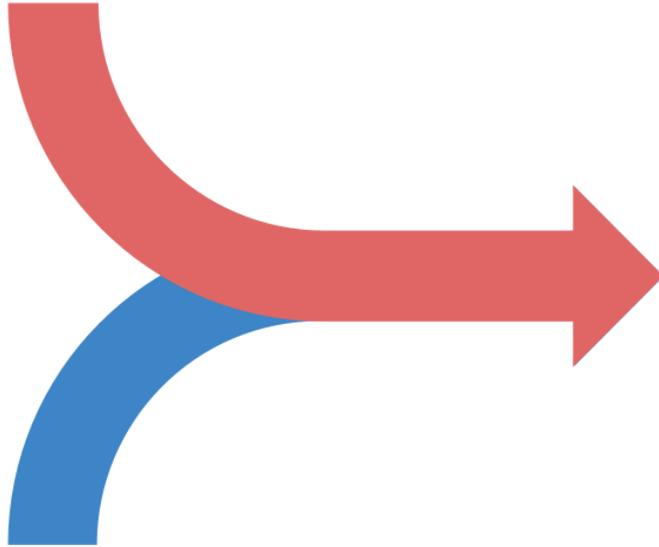


# Early Progress

- Leveraged data to develop predictive replacement plans
- Improved Asset Management
- Better visibility into labor utilization



# Financial Integration



- Inaccurate Financial Information
- The financial information in the two systems didn't match
- The solution was an MIF integration between Maximo and our financial system of record

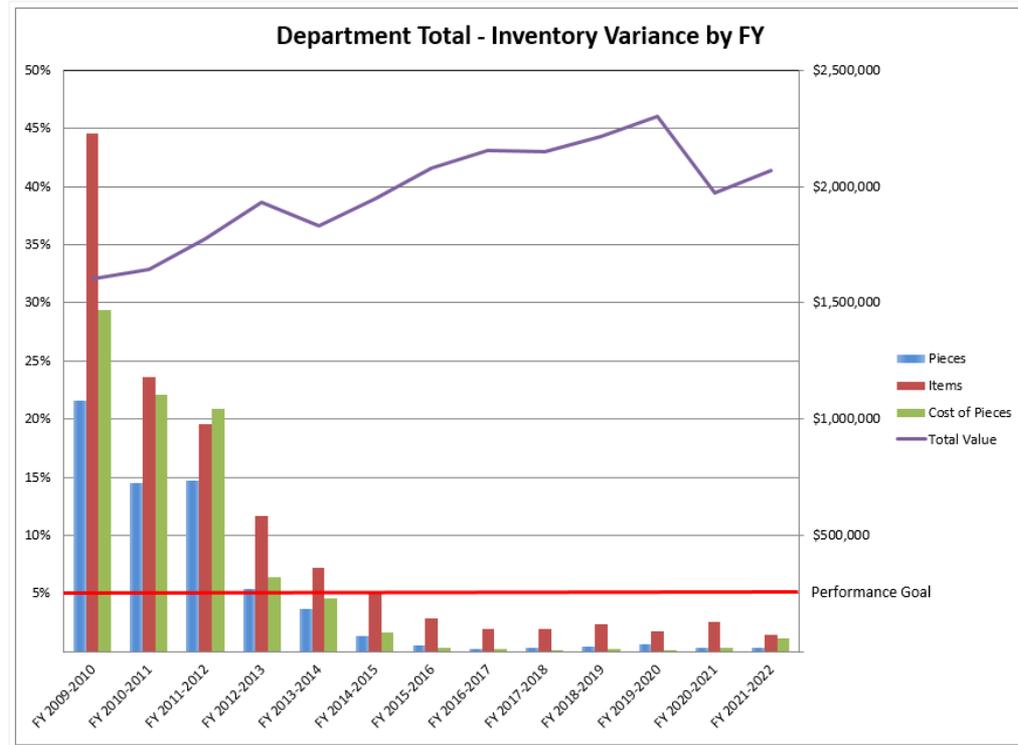
# Evolution of Maximo - Inventory

## Inventory

- Track item, piece and dollar variance
- Sum items 'found' and 'missing'
- Calculate variance %



# Evolution of Maximo - Inventory



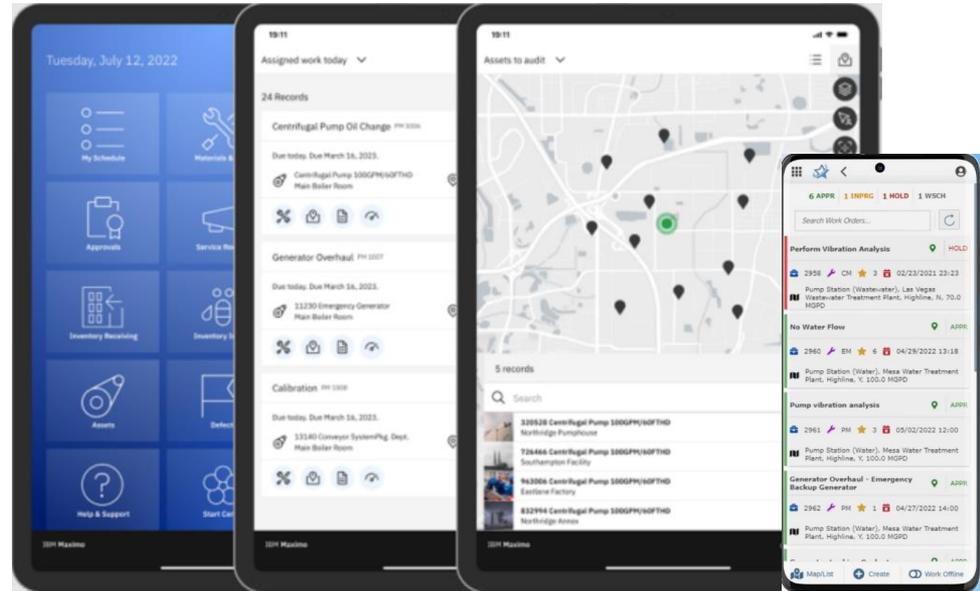
# Maximo – Forging the Future



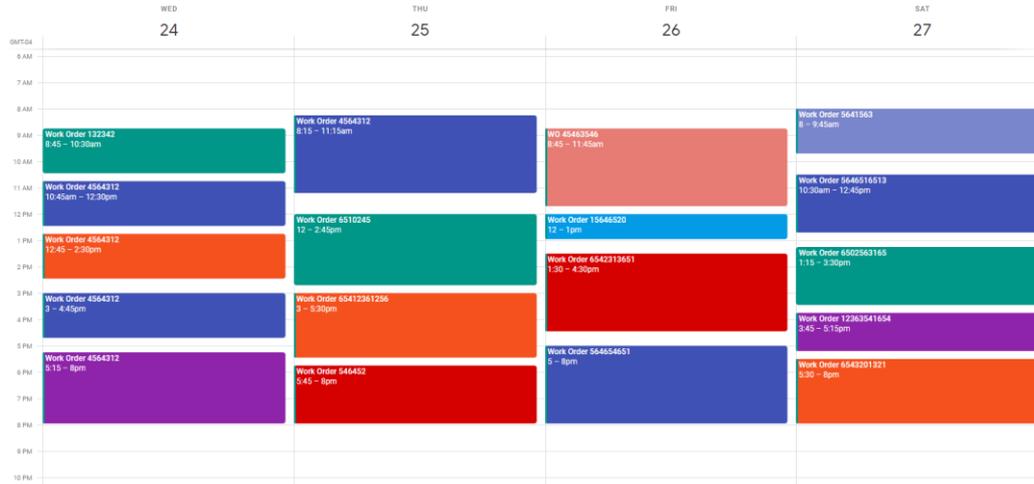
- Mobile Maximo
- Work Order Planning
- New features
- GIS integration

# Mobile Maximo

- Real-time data entry
- More accurate inventory transactions
- Real-time inventory availability
- Historical asset data available in the field



# Planning



- Personnel Planning
- Scheduling materials
- Tool and asset scheduling

# New Features

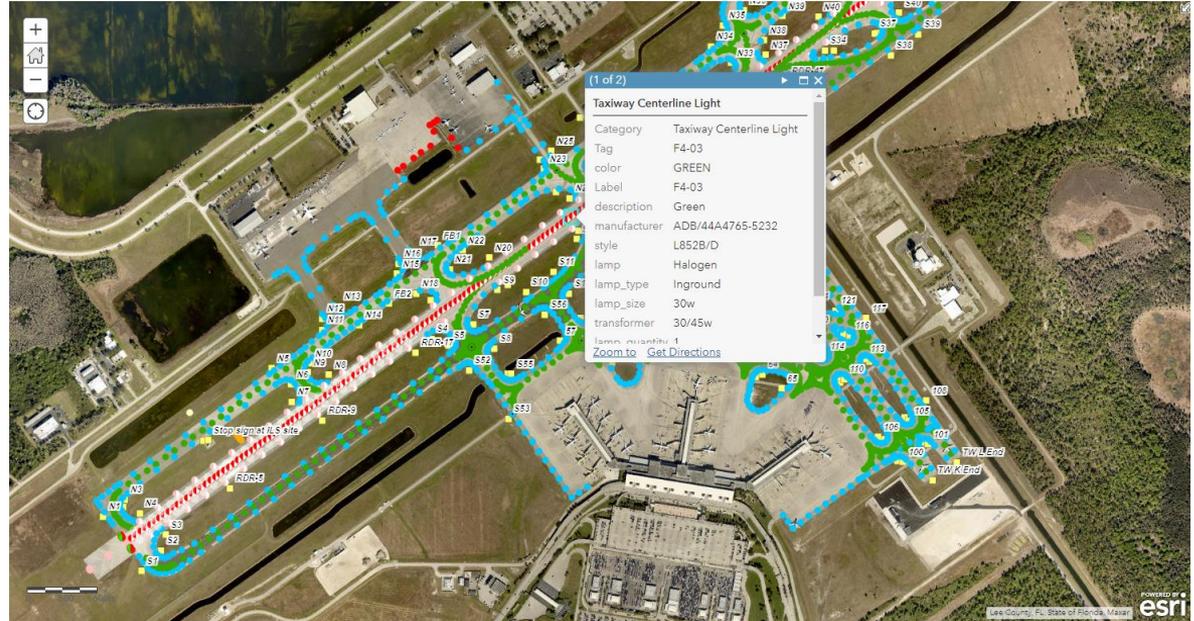
➤ Work Centers

➤ Inspections



# Future Initiatives

- GIS Integration
- Currently we use ArcGIS
- Integration with Operations and Safety Management System software





# Questions?



Maximo Capabilities often forgotten

Chris Winston – Projotech

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<https://www.linkedin.com/in/chriswinston>

<https://moremaximo.com>

**30**  
YEARS  
Projotech Inc.  
#SINCE1990



# About Projotech

Projotech, a Gold IBM Business Partner, offers IBM Maximo: the global standard in software for Enterprise Asset Management and maintenance. Since 1999, Projotech has been providing Maximo as a Service (MaaS), which allows clients to manage, maintain and scale their solution requirements while benefiting from flexible services and lower operating costs.

- 5 datacenters worldwide
- Maximo as a Service since 1999
- 150+ clients worldwide
- Manage 700+ VMs daily
- Manage 350+ instances daily
- Audited ISMS Policies
- IBM business partner since 1995
- Partner network of industry experts



# Is Maximo widely used on Earth?

Watson IoT.



Maximo manages the world's most asset-intensive organizations



## Who in the world depends on IBM Maximo?

Top organizations throughout the planet!<sup>1</sup>



**10 of the 13**  
largest pharmaceutical companies<sup>1</sup>



**10 of the 20**  
largest oil and gas companies<sup>2</sup>



**5 of the 15**  
busiest shipping ports in the world<sup>1</sup>



**16 of the 24**  
largest automotive companies<sup>1</sup>



**9 of the 18**  
largest diversified utility companies<sup>1</sup>



**7 of the 10**  
major aerospace and defense companies<sup>3</sup>



**14 of the 20**  
largest power generation utilities<sup>1</sup>



**12 of the 20**  
largest power distribution utilities<sup>1</sup>



**44.2**  
million rail travelers daily



**9 of the 18**  
busiest airports in the world<sup>4</sup>

## Who has the power of Maximo?

The most successful American electric generators and distributors!



## Who's going places with Maximo?

Trains, planes and people on the move throughout the world!



## Here's why asset-intensive organizations choose Maximo:



**5–20%**  
reduction in downtime and material costs



Up to **10–20%**  
improvement in labor utilization

**Maximo comes with tools  
to alter it to fit your use cases**

- **Configuration &  
Tailoring**

- **Customization**

# Organization Options – maybe too many

## Work Order Options ^

Work Type

Edit Rules

Other Organization Options

Site Options

Everyplace Work Query Opti...

## Inventory Options ^

Item Options

Inventory Defaults

Reorder

Inventory Costs

Transfer Options

Count Books Options

## Crew Assignment Options

Asset Options

Drilldown Options

PM Options

Safety Plan Options

Purchasing Options ^

PO Options

Contract Options

Tax Options

PO Labor Options

Invoice Options

## Labor Options

Service Desk Options

Global Ticket Solution Option

SLA Options

Ownership Assignment Options

Workflow Options

Autonumber Setup

System Level

Set Level

Organization Level

Site Level

## System Settings

Delete Organization

Add to Bookmarks

Calibration Options

Work Order - Other Organiza.

Work Order - Edit Rules

Associate Time Zone

# Org setting – Labor options



Amy Tellier-Briggs posted 05-31-2023 08:04

Folks,

We are running Maximo 7.6.1.2. I have a technician that entered a -112.5 hour actual transaction that we need to get rid of. Problem is. he can't enter a +112.5 hour transaction to cancel it out because Maximo won't allow him to enter any more than 8 hours on a given day. Any ideas?

Thanks,  
Amy Briggs  
Jackson Laboratory

# Org setting – Labor options



Amy Tellier-Briggs posted 05-31-2023 08:04  
Folks,

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Thanks,  
Amy Briggs  
Jackson Laboratory



Christopher Winston posted 05-31-2023 08:50 Best Answer  
Technically this is ruled by the organization labor option setting for future labor transaction tolerance

Query Based Reporting – Runti...

The screenshot shows the 'Organizations' page in Maximo with a 'Labor Options' dialog box open. The dialog box contains the following settings:

- Automatically Approve Inside Labor Transactions?
- Automatically Approve Outside Labor Transactions?
- Allow Mismatched Craft and Labor When Reporting Actual Labor?
- Automatically Approve Invoices Created from Labor Transactions?
- Future Labor Transaction Tolerance in Hours: 115:00

At the bottom of the dialog box are 'OK' and 'Cancel' buttons. Below the dialog box, the 'Default Item Status' is set to 'PENDING' and the 'Default Stock Category' is set to 'STK'.

Change it to allow this transaction only, and then change it back after save. You should probably note this in your change control documentation as well in case it comes up on an audit, as you may not remember it was done.

# Maximo Edit Rules for consideration

- Need to insert / update the asset number when work is at INPRG? Change the default settings

The screenshot displays the IBM Maximo Application Suite interface. The main window is titled "Organizations" and shows "Edit Rules" for "Work Order Edit Settings (1 - 6 of 6)". The settings are organized into a table with columns for Status, GL Account?, Asset?, Location?, WP Labor?, WP Materials?, and WP Servi?. The INPRG status is highlighted with a blue box, and a mouse cursor is pointing at the Asset? checkbox, which is currently unchecked. To the right, a "Work Plan Edit Options" dialog box is open, showing a table with columns for Status, GL Account, Equipment, Location, WP Labor, WP Materials, WP Tools, and Safety Tab. The table contains data for various statuses: APPR, COMP, INPRG, WAPPR, WMATL, and WSCH.

Status	GL Account?	Asset?	Location?	WP Labor?	WP Materials?	WP Tools	Safety Tab
APPR	N	N	N	N	N	N	N
COMP	N	N	N	N	N	N	N
INPRG	N	N	N	N	N	N	N
WAPPR	Y	Y	Y	Y	Y	Y	Y
WMATL	N	N	N	N	N	N	N
WSCH	N	N	N	N	N	N	N

At the bottom of the interface, there are "Cancel" and "OK" buttons.

# Domains – many delivered, but you can add as too

- Over 400 in v7.6.x; Over 550 in v8
- Example of a synonym domain to edit
  - MCOMP (FCOMP, etc.) synonym of INPRG
- Priority Fields have no delivered domains
  - Admin can add them
  - Populate with locally approved value
  - Attached to fields via db config
  - They stay attached through upgrade

SYNONYM Domain

Domain: WOSTATUS

Domain Type: SYNONYM

Length:

SYNONYM Domain [Filter](#) > 1 - 10 of 11

<input type="checkbox"/>	Internal Value	Value	Description +	Default?
<input type="checkbox"/>	▶ APPR	APPR	Approved	<input checked="" type="checkbox"/>
<input type="checkbox"/>	▶ CAN	CAN	Canceled	<input checked="" type="checkbox"/>
<input type="checkbox"/>	▶ CLOSE	CLOSE	Closed	<input checked="" type="checkbox"/>
<input type="checkbox"/>	▶ COMP	COMP	Completed	<input checked="" type="checkbox"/>
<input type="checkbox"/>	▶ INPRG	INPRG	In Progress	<input checked="" type="checkbox"/>
<input type="checkbox"/>	▶ INPRG	MCOMP	Maintenance Complete	<input type="checkbox"/>
<input type="checkbox"/>	▶ WAPPR	WAPPR	Waiting on Approval	<input checked="" type="checkbox"/>
<input type="checkbox"/>	▶ WMATL	WMATL	Waiting on Material	<input checked="" type="checkbox"/>
<input type="checkbox"/>	▶ APPR	WPCOND	Waiting on Plant Cond	<input type="checkbox"/>
<input type="checkbox"/>	▶ WSCH	WSCH	Waiting to be Scheduled	<input checked="" type="checkbox"/>

Select Records

# Roles & Communication Templates

Comm Create Communication

To create communication, select a template or directly enter the message and details.

Template  
PONOTIFICATIC >

To  
POI  
George.Defrost@CMC.com, Gerald.Denning@CMC.com

cc

Ro

bcc

Subject  
Purchase Order Report 1114 / Changeover Managemc

Message

Font [ ] Size small Format None

Please see the attached purchase order 1114. Reference this PO number on invoices related to this order; submit invoices to [ap@mycompany.comn](mailto:ap@mycompany.comn). **Please review the attached PO and Acknowledge Receipt.**

If there are any questions or concerns, please contact My Company's Procurement Team at [buyer@mycompany.comn](mailto:buyer@mycompany.comn).

For extremely urgent matters or concerns, please contact the My Company's Procurement Team, at 555-555-1234.

Role  
POVNDCTCT Purchase Order Vendor Contacts

\*Type  
A set of data rel. >

Object  
PO >

\*Value  
:PO\_VENDOR.CONTACT.email >

Parameter  
:PO\_VENDOR.CONTACT.email

E-mail?

- Custom class
- A set of data related to the record
- Email address
- Person
- Person Group
- A set of data related to the login user



# Add Calculations to Reporting Library

- Query Based Reporting can be enhanced with additional calculation expressions by adding them to the library
- Confirm the syntax is correct and be sure to test and re-test before adding to production

The screenshot displays the IBM Maximo Application Suite interface for Report Administration. On the left, a sidebar menu includes options like 'New Report', 'Create Report', and 'Define Ad Hoc Reporting Library'. The main content area shows the 'Ad Hoc Report Expression Library' configuration page. At the top, it instructs users to define expression keywords for SQL expressions. Below this is a table listing existing keywords: CASEWHEN, Date, DateTime, and DayDateDiff. The 'DayDateDiff' entry is selected, and its details are shown below, including the expression ID, description, and the SQL syntax: `datediff(day,&DATETIME,<FIELD>)`.

Expression Id	Expression	Description	
CASEWHEN	case when (<EXPR>) then <TRUE> else	Used for Conditional Expressions	🗑️
Date	&DATE&	Maximo Date variable	🗑️
DateTime	&DATETIME&	Date-time variable	🗑️
DayDateDiff	datediff(day,&DATETIME,<FIELD>)	Calculate the amount of days between t	🗑️

**Details**

Expression Id  
DayDateDiff

Description  
DayDateDiff

Calculate the amount of days between today and the field specified (this could be negative if the field is in the past)

\* Expression  
datediff(day,&DATETIME,<FIELD>)

# Query Based Reporting – Runtime Parameters

How is this done?

- Create and Save QBR
- In Report Administration, add Parameters
  - Parameter fields must already be in the report
- Set Attributes as needed
  - For Dates, remember to enter Earliest and Latest parameters to allow for date range
  - Enter a display name so that the user can tell the difference between fields
  - Set operator as needed ( $\geq$  for Earliest /  $\leq$  for Latest/ etc.)
  - Add the lookup as needed (datelookup, site, etc) to simplify usage
  - Save and then click on 'Generate Request Page'
- Resulting QBR may also be run from Start Center

# QBR Report Administration Page

IBM Maximo Application Suite | Manage Take a tour

## Report Administration

Report | Security | Performance

Parameters (1 - 3 of 3)

Parameter Name	Attribute Name	Sequence	Display Name	Multi-Lookup Enabled?	Operator	Required?
Site ID	siteid		Site ID('s)	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>

Details

Parameter Name: Site ID

Attribute Name:

Lookup Name:

Display Name:

Display Sequence:

Required?:

Multi-Lookup Enabled?:

Default Value:

Operator:

- Multi-Lookup – allows more than 1 something (e.g. siteid, worktype, etc.)
- Operator – sets limit on date

Earliest Actual Finish Date	actfinish	1	Earliest Actual Finish Date	<input type="checkbox"/>	<input <="" td="" type="text" value="&gt;="/> <td><input checked="" type="checkbox"/></td>	<input checked="" type="checkbox"/>
Latest Actual Finish Date	actfinish	2	Latest Actual Finish Date	<input type="checkbox"/>	<input <="" td="" type="text" value="&lt;="/> <td><input checked="" type="checkbox"/></td>	<input checked="" type="checkbox"/>

# Integration Module: Object Structures

- Should be used for:
  - Start Center Results Sets
  - Query Based Reporting

## Object Structures

### > Object Structure



Source Objects for REP\_INVENTOR\_ITEM (1 - 4 of 4)



Object	Parent Object	Object Location Path	Relationship	Object Order	User Defined?	Exclude Attributes Mode?
INVENTORY		INVENTORY		1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
INVCOST	INVENTORY	INVENTORY/INVCOST	INVCOST	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
INVBALANCES	INVENTORY	INVENTORY/INVBALANCES	INVBALANCES	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ITEM	INVENTORY	INVENTORY/ITEM	ITEM	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>

# Substitution Variables for Q's and QBR's

related to the current user's default insert site:

- ...(siteid in (select defsite from maxuser where userid= :USER))

related to the current user being the person assigned as lead (replace 'lead' below with reportedby, supervisor, owner, etc., as needed)

- ...lead = (select personid from person where personid = (select personid from maxuser where userid = :USER ))

related to the current user being the person on a team assigned as owner group (replace ownergroup with persongroup if needed)

- ownergroup in (select persongroup from persongroup where persongroup in (select persongroup from persongroupteam where resparty in (select personid from person where personid = (select personid from maxuser where userid = :USER ))))

You can also have other substitution variables in the same query such as, a query for work awaiting approval over 90 days (replace getdate() with SYSDATE for Oracle)

- ...status = 'WAPPR' and reportdate > getdate()-90)

Purchase Orders with open receiving (use in Receiving and PO apps)

- ((status in ('APPR', 'INPRG') and upper(receipts) = 'NONE' or upper(receipts) = 'PARTIAL') and historyflag = 0)

In Purchase Orders, to find p.o.'s where the user is the buyer

- (historyflag = 0 and purchaseagent = (select personid from person where personid = (select personid from maxuser where userid = :USER) ) and siteid = 'BEDFORD')

## Locations, Assets and Primary System Hierarchy

- Build Primary System First
- Build Location Hierarchy for Primary System
- Each Asset should be assigned to a location or a child / descendent of an asset at a location
- Each Work Order should be assigned an asset whenever possible
  - Builds Better history
  - Supports gathering Total Cost of Ownership
  - Assets **only** can use spare part autoadd

# Drilling down into your costs

Reporting IBM.

Page 1 of 1

**Cost by System**

System: PRIMARY Primary Hierarchy  
 Site: BEDFORD  
 Start Date: 1/1/90  
 End Date: 6/1/17

Location	Description	Children	Description	Additional Children?	Total Cost
NEEDHAM	Needham Site			Y	1098.10
		<a href="#">BOILER</a>	Boiler Room	Y	8824.45
		<a href="#">FLTGAR</a>	Fleet Garages	Y	0.00
		<a href="#">OFFICE</a>	Office Building - Address Unit #2010 Oak St.	Y	1979.39
		<a href="#">PACKAGE</a>	Packaging Department	Y	1925.38
		<a href="#">PLANT-P1</a>	Materials Processing Plant #1	Y	0.00
		<a href="#">ROCKCENTER</a>	Rockefeller Center	Y	0.00
		SHIPPING	Shipping and Receiving Department	N	3413.00
<b>Total for NEEDHAM :</b>					17240.32

5/31/17 9:01 AM 1 / 1

At the top level, the BOILER appears to be taking up almost half the maintenance cost

Reporting IBM.

Page 1 of 1

**Cost by System**

System: PRIMARY Primary Hierarchy  
 Parent: NEEDHAM Needham Site  
 Site: BEDFORD  
 Start Date: 1/1/90  
 End Date: 6/1/17

Location	Description	Children	Description	Additional Children?	Total Cost
BOILER	Boiler Room			Y	562.11
		<a href="#">BR200</a>	HVAC System- Main Office	Y	872.00
		BR230	Boiler Room Emergency Generator	N	0.00
		BR300	Boiler Room Reciprocating Compressor	N	144.00
		<a href="#">BR400</a>	Main Boiler- 50,000 Lb/Hr	Y	7246.34
<b>Total for BOILER :</b>					8824.45

5/31/17 9:04 AM 1 / 1

A single click on the BOILER hyperlink gets me here, to see that BR400 is the biggest \$\$ user, and so on...

# Backlog of Work On BOILER

More Search Fields| Current Query:

Work Order:  Problem Code:  Crew Work Group:

Description:  Failure Class:  Work Type:

Parent WO:  Service Group:  Status:

Location:  Service:  Class:

---

Search **Work Order Tracking** MAXADMIN

Query  Find Work Ord

List Work Order Plans Assignments Related Records Actuals Safety Plan Log Failure Reporting Specifications Service Address Map

Advanced Search  Save Query  Bookmarks

Work Orders     1 - 10 of 10

Work Order	Description	Location	Asset	Status	Reported Date	Scheduled Start	Work Type	Priority	Site
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	I=COMP	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	=BEDFORD
<a href="#">1003</a>	Check for Plumbing Problem	BOILER		APPR	12/31/98 12:12 PM	3/30/16 3:00 PM	CM	5	BEDFORD
<a href="#">2007</a>	Air Filter - Check-out	BOILER		WAPPR	12/31/98 9:00 AM		CM	5	BEDFORD
<a href="#">2008</a>	Fire Door Cable Broken	BOILER		WAPPR	12/31/98 9:00 AM		CM	8	BEDFORD
<a href="#">2009</a>	Ventilator in Boiler Room Making Noise - Check-out	BOILER		WAPPR	12/31/98 9:00 AM		CM	5	BEDFORD
<a href="#">5007</a>	Air Filter - Check-out	BOILER		WAPPR	12/31/98 9:00 AM		CM	2	BEDFORD
<a href="#">5008</a>	Fire Door Cable Broken	BOILER		WAPPR	12/31/98 9:00 AM		CM	5	BEDFORD
<a href="#">5009</a>	Ventilator in Boiler Room Making Noise - Check-out	BOILER		WAPPR	12/31/98 9:00 AM		CM	5	BEDFORD
<a href="#">6007</a>	Air Filter - Check-out	BOILER		WAPPR	1/2/02 7:21 AM		EM	2	BEDFORD
<a href="#">6008</a>	Fire Door Cable Broken	BOILER		WAPPR	1/2/02 7:21 AM		EM	1	BEDFORD
<a href="#">6009</a>	Ventilator in Boiler Room Making Noise - Check-out	BOILER		WAPPR	12/18/01 3:03 PM	12/18/01 5:13 PM	EM	2	BEDFORD

Select Records

# Backlog of Work on BOILER Hierarchy

More Search Fields | Current Query:

Work Order:

Problem Code:

Crew Work Group:

Description:

Failure Class:

Work Type:

Parent WO:

Service Group:

Status:

Location:

Service:

Class:

Search Location Hierarchy:

Asset:

Configuration Item:

PM:

Classification:

Repair Facility:

Repair Facility Site:

## Plan Details

Job Plan:

Assigned C...

Safety Plan:

Plan C...

Assigned Labor:

Plan Mater...

Plan Crew Type:

Plan Servi...

Plan Tc...

## Dates

statictext... From

Work Order	Description	Location	Asset	Status	Reported Date	Scheduled Start	Work Type	Priority	Site
1000	Relocate Guard Rails Around Compressor	BR300	11300	PLAN	12/31/98 12:18 PM	3/30/16 3:00 PM	CM		2 BEDFORD
1002	Rebuild Feedwater Pump	BR450	11450	APPR	12/31/98 11:08 AM		CM		3 BEDFORD
1003	Check for Plumbing Problem	BOILER		APPR	12/31/98 12:12 PM	3/30/16 3:00 PM	CM		5 BEDFORD
1004	Generator Overhaul	BR230	11230	INPRG	12/31/98 10:50 AM		CM		1 BEDFORD
1006	Feedwater Pump Service	BR450	11450	APPR	12/31/98 9:22 AM	3/30/16 3:00 PM	CM		7 BEDFORD
1008	Repair Damaged Conduit Feeding Generator	BR230	11230	WAPPR	12/31/98 9:33 AM	3/30/16 3:00 PM	CM		7 BEDFORD
1018	Paint Guard Rail Around #1 Fan	BR210	11210	WAPPR	1/14/97 7:03 PM		CM		4 BEDFORD
1020	Generator Overhaul	BR230	11230	WSCH	4/22/02 4:34 AM	3/30/16 3:00 PM	EM		2 BEDFORD
1024	Condensate Return Pump Quarterly Service	BR430	11430	WSCH			PM		6 BEDFORD
1026	HVAC Quarterly Inspections & Certification	BR200	11200	WSCH		3/30/16 3:00 PM	PM		6 BEDFORD
1027	Compressor Quarterly Inspection and Certification	BR300	11300	WSCH		3/30/16 3:00 PM	PM		5 BEDFORD
1028	Burner Quarterly Inspection and Certification	BR460	11460	WSCH			PM		7 BEDFORD
1201	Relocate Guard Rails Around Compressor	BR300	11300	WAPPR	6/23/16 2:33 PM		CM		2 BEDFORD
1206	pump is leaking	BR430	11430	WAPPR	7/8/16 12:58 AM		CM		BEDFORD
1208	Condensate Return Pump Quarterly Service	BR430	11430	WAPPR	10/11/16 11:28 PM		PM		6 BEDFORD
1221	HVAC overheating	BR200	11200	APPR	2/14/17 3:18 PM	3/30/16 3:00 PM	PM		2 BEDFORD
1264	Condensate Return Pump Quarterly Service	BR430	11430	WSCH	4/17/17 11:42 AM		PM		9 BEDFORD
1281	Inspect and Repair Relay	BR430	11430	APPR	4/17/17 11:57 AM				8 BEDFORD

## Honorable Mentions

### Cron Tasks

- KPICronTask – generates data point

### System Properties

- \*mail.\* - configure email for send / receive

### PM Help to Bookmark

<https://tinyurl.com/MaximoPMHelp> (7.6.x)

<https://tinyurl.com/PMManage> (8.x)

- Maximo 8 Navigation for the 7.6 user:

<https://youtu.be/CfF8C69IA0Y>

Change version

continuous-delivery

Show full table of contents

Filter on titles

**Preventive Maintenance**

Preventive maintenance overview

Preventive maintenance statuses

Seasonal preventive maintenance

Preventive maintenance frequency schedules

Preventive maintenance forecasting cron task

Preventive maintenance hierarchies

Preventive maintenance records associated with routes

**Sequences for Preventive maintenance job plans**

Preventive maintenance alerts

Preventive maintenance lead time

Preventive maintenance next due dates

Working with preventive maintenance records

Creating preventive maintenance records

Defining alert lead time for preventive maintenance records

Defining seasonal dates for work order generation

Defining when work orders are generated

Assigning job plans to

Download PDF

# Sequences for Preventive maintenance job plans

Last Updated: 2023-02-09

You can assign one or more job plans to a preventive maintenance (PM) record. If you assign more than one job plan to a PM, sequence numbers determine how often a plan is used.

Job plan sequences let you schedule different levels of maintenance work at specified intervals.

For example, you can assign monthly, quarterly, and yearly job plans for work on an asset. The monthly job might be several simple maintenance tasks, while the quarterly and yearly jobs might be more complex.

You could add a sequence of three job plans to specify different inspections of a turbine:

- A monthly basic inspection of a turbine
- A quarterly inspection of its components
- A yearly inspection of the turbine and its feeder system

By assigning a sequence number to each job plan, you specify which job plan is selected each time a work order is generated from the PM.

## How job plans are selected

When you generate a work order from a PM, the system first increments the value in the **Counter** field by one, then selects the job plan. The system selects the job plan with the highest sequence number that divides evenly into the value in the **Counter** field. If no sequence number meets this criterion, the primary job plan (sequence number one) is used. The value in the **Sequence** field means that this job plan would be used on every *n*th work order generated from the PM, where *n* is the sequence number.

## Example: Job plan sequence for a turbine

For the turbine inspections, you would create a job plan sequence as follows:

Table 1. Example of a job plan sequence for turbine inspections

Job Plan	Description	Sequence	Meaning
INS-TURB	Inspect turbine	1	This job plan is the default or primary job plan. It is used unless the sequence calls for a different plan. This job plan is used when the value in the <b>Counter</b> field is divisible only by one.
INS-TURBCOMP	Inspect turbine components	3	This job plan is used when three is the highest number that divides evenly into the value of the <b>Counter</b> field.
INS-TURBFEEED	Inspect turbine and feeder system	12	This job plan is used when 12 is the highest number that divides evenly into the value of the <b>Counter</b> field.

### Preventive maintenance counter

The preventive maintenance (PM) counter specifies the number of work orders that were generated from a PM since the first start date.

QUESTIONS?

# Overtime Offer Tracking

In Maximo

FLMUG June 2023

Bryan Grant, Andrew Apold and Travis Davis



# People

**105,000**  
Employees



**54,000**  
Scientists and  
Engineers



**375+**  
Facilities  
Worldwide



Operating in over  
**54** Countries

With **7,500+**  
Employees



# Lockheed Martin Business Areas



## Aeronautics

- Tactical Fighters
- Tactical /Strategic Airlift
- Advanced Development
- Sustainment Operations



## Missiles and Fire Control

- Air and Missile Defense
- Tactical Missiles
- Fire Control
- Combat Maneuver Systems
- Energy



## Rotary and Mission Systems

- Maritime Solutions, Radar and Surveillance Systems
- Cyber & Electronic Warfare
- Aviation Systems and Rotorcraft
- Training and Logistics Solutions



## Space

- Surveillance and Navigation
- Global Communications
- Human and Deep Space Exploration
- Strategic and Defensive Systems

# Lockheed Martin Aeronautics

- 26,000+ employees
- Ten locations
- Global partnerships



**WARNING LIGHTS**  
RED FLASHING LIGHT    BLUE FLASHING LIGHT  
AIRCRAFT HYDRAULIC &  
POWER  
If light is illuminated, personnel must contact area designee to request access to aircraft and surrounding area.

# Lockheed Martin Aeronautics



- History – Lockheed
- 3 Primary Sites, 6 Secondary Sites

# Lockheed Martin Aero Maximo

- 5 separate Maximo Instances
  - Instances using 2 version (Maximo 4 and 5) across 3 sites for both Facilities and Plant Engineering
  - Non-Production
- Additional organizations added
  - Transportation (Fleet and Garage services)
  - IT (AskIT)
  - Property Accounting
  - Tool Repair (Project Tooling)

# Lockheed Martin Aero Maximo

- Existing State (prior to changes) - Marietta
  - Overtime calculated on excel spreadsheet
    - Spreadsheet originally created in 1990s in Lotus 123
    - Uses macros with fixed cell ranges
    - Spreadsheet on a shared network drive, used by multiple supervisors per shop
    - Spreadsheet used in weekly overtime meetings to plan following week
    - Call in list printed from spreadsheet, used to call in craftpersons for emergency situations, in order determined by union contract rules
    - Frequently broken when attempting to add or remove craftpersons
  - Errors in overtime offers could result in a grievance with the union, resulting in having to pay another craftperson for the time they could have worked but were not offered in the proper priority order.



# Recorded Macros

```
Sub AIRCONDITIONING ()
|'
|' AIRCONDITIONING Macro
|' Macro recorded 11/14/2001 by [REDACTED]
|'
Application.ScreenUpdating = False
    Range("R12:R27").Select
    Selection.Copy
    Range("AH12").Select
    Selection.PasteSpecial Paste:=xlValues, Operation:=xlNone, SkipBlanks:= _
        False, Transpose:=False
    Range("D12:Q27").Select
    Application.CutCopyMode = False
    Selection.ClearContents
    Range("AH12:AH27").Select
    Selection.Copy
    Range("C12").Select
    ActiveSheet.Paste
    Range("A12:T27").Select
    Application.CutCopyMode = False
    Range("A12:T27").Select
    Selection.Sort Key1:=Range("C12"), Order1:=xlAscending, Key2:=Range("A12" _
        ), Order2:=xlAscending, Header:=xlGuess, OrderCustom:=1, MatchCase:= _
        False, Orientation:=xlTopToBottom
    Application.CutCopyMode = False
    Range("T9").Select
    Application.CutCopyMode = False
    Selection.Copy
```

# Call In List

RFM7 DAYSHIFT CALL IN LIST					page 1
Update		DO NOT MODIFY VALUES ON THIS SHEET!!! CHANGE ONLY ON THE ORIGINAL TAB			
Craft	Name	Name	Hours	Phone #	
Boilerhouse	Bunsen, B.	Bunsen, B.	1186.00	H: 555-253-4745 C: 555-694-8245	
Boilerhouse	Euler, F.	Euler, F.	1197.03	H: 555-661-5449 C: 555-910-9521	
Boilerhouse	Coleman, S.	Coleman, S.	1198.68	H: 555-002-7302 C: 555-147-6531	
Boilerhouse	Hill, H.	Hill, H.	1207.40	DNC	
IWT	Salazar, L.	Salazar, L.	1705.00	H: 555-295-9276 C: 555-699-6348	
IWT	Pollock, J.	Pollock, J.	1718.35	H: 555-785-7208 C: 555-472-4485	
IWT	Wright, T.	Wright, T.	1718.86	DNC	
AC Shop	Carrier, M.	Carrier, M.	1701.00	H: 555-010-0114 C: 555-412-4317	
AC Shop	Rheem, W.	Rheem, W.	1707.46	- C: 555-085-8670	
AC Shop	Lennox, L.	Lennox, L.	1721.99	H: 555-713-5802 C: 555-315-0809	
AC Shop	Amana, B.	Amana, B.	1729.28	H: 555-278-4622 -	
AC Shop	Trane, C.	Trane, C.	1731.32	H: 555-492-7134 C: 555-605-8437	
AC Shop	York, M.	York, M.	1744.35	DNC	
AC Shop	Ruud, B.	Ruud, B.	1744.88	H: 555-805-0326 C: 555-224-9429	
AC Shop	Goodman, J.	Goodman, J.	1755.60	DNC	
Sheet Metal	Hill, J.	Hill, J.	1400.50	H: 555-150-5010 C: 555-977-9363	
Sheet Metal	Gompers, S.	Gompers, S.	1402.00	H: 555-183-9961	
Sheet Metal	Debs, E.	Debs, E.	1401.00	H: 555-833-1834 C: 555-740-1533	
Sheet Metal	Garibalidi, G.	Garibalidi, G.	1400.00	DNC	
Sheet Metal	Hillman, S.	Hillman, S.	1399.50	H: 555-290-3430 C: 555-560-7459	
Sheet Metal	Jones, M.	Jones, M.	1409.50	- C: 555-668-0581	
Sheet Metal	Kirkland, L.	Kirkland, L.	1421.00	DNC	
RFM7 DAYSHIFT CALL IN LIST					
Plumbing	Plummer, C.	Plummer, C.	1992.00	H: 555-123-9507 -	
Plumbing	Mario, M.	Mario, M.	1996.36	Do Not Call	
Plumbing	Luigi, M.	Luigi, M.	1998.39	- -	
Plumbing	Mario, B.	Mario, B.	2005.08	Do Not Call	

# Lockheed Martin Aero Maximo

- Proposed Solution
  - Track Overtime Offers in Maximo
    - Maximo Existing Overtime Offer Tracking feature:
      - LABOR.YTDOTHRS
      - LABOR.YTDHRSREFUSED
    - These fields offer basic tracking and yearly reset, but do not provide any additional features, they must be manually updated on the labor record, and do not track dates and times of offers, use priority tiebreakers or other requirements we have from union contracts.
    - Deemed insufficient for needs of Overtime Offer Tracking
  - New solution in Maximo – create new custom application and tables and scripts to handle overtime offer tracking

# Lockheed Martin Aero Maximo

- New Tables:

<u>OBJECTNAME</u>	<u>DESCRIPTION</u>
LMOTOCHARGES	Overtime Tracking Charges
LMOTOINITHOURS	Overtime Tracking Initial Hours
LMOTOLISTS	Overtime Tracking Lists Table
LMOTOLISTTEAM	Overtime Tracking List Team

# Live Demo

# Lockheed Martin Aero Maximo

- New Custom Application:

The screenshot displays the 'Overtime Offer Tracking' application interface. The main content area shows a table of 'Call Lists' with the following data:

Team	Supervisor	Name	Site	Week Ending
Air Conditioning Mechanics	276865	[Redacted]	MAF-MARIETTA	4/6/23
Automated Machine Mechanics	276858	[Redacted]	MAF-MARIETTA	4/6/23
Automated Machine Mechanics Building B-1	309155	[Redacted]	MAF-MARIETTA	3/30/23
Carpenters	270820	[Redacted]	MAF-MARIETTA	4/6/23
Fuel Farm Mechanics	250278	[Redacted]	MAF-MARIETTA	4/6/23
Garage Mechanics	250278	[Redacted]	MAF-MARIETTA	4/6/23
Graveyard Electricians	268341	[Redacted]	MAF-MARIETTA	4/6/23
Graveyard Industrial Waste Technicians	268341	[Redacted]	MAF-MARIETTA	4/6/23
Graveyard Mechanics	268341	[Redacted]	MAF-MARIETTA	4/6/23
Graveyard Plumbers	268341	[Redacted]	MAF-MARIETTA	4/6/23
Graveyard Stationary Engineers	268341	[Redacted]	MAF-MARIETTA	4/6/23
Industrial Electricians	309155	[Redacted]	MAF-MARIETTA	4/6/23
Industrial Electricians	309155	[Redacted]	MAF-MARIETTA	3/30/23
Industrial Waste Treatment Operators	266781	[Redacted]	MAF-MARIETTA	4/6/23

# Lockheed Martin Aero Maximo

- Week view of offered overtime:

Week Ending:  Site: MAF-MARIETTA

Supervisor:  Team: Automated Machine Mechanics

Last Changed:  Changed By:  Entered Date:  Entered By:

### Call List

Note: Adding or removing people from the Call List will not affect their charges. Please use the "Manage Charges" dialog to work with specific charges transactions.

Filter > 1 - 13 of 13

Person	Name	Phone	DNC?	Rank	PYTD Hours	Fri, 2/17	Code	Sat, 2/18	Code	Sun, 2/19	Code	Mon, 2/20	Code	Tue, 2/21	Code	Wed, 2/22	Code	Thu, 2/23	Code	YTD Hours
10000	John Doe	123456789	<input checked="" type="checkbox"/>		461.13	12.00	R	12.00	R	16.00	R	0.00		0.00		0.00		0.00		501.13
10001	Jane Smith	987654321	<input checked="" type="checkbox"/>		459.22	12.00	W	14.25	R	16.00	R	0.00		0.00		0.00		0.00		501.47
10002	Robert Brown	112233445	<input checked="" type="checkbox"/>		459.28	12.00	W	14.25	W	16.00	W	0.00		0.00		0.00		0.00		501.53
10003	Michael Green	556677889	<input type="checkbox"/>		463.50	12.00	R	12.00	R	16.00	R	0.00		0.00		0.00		0.00		503.50
10004	Thomas White	001122334	<input type="checkbox"/>		463.59	12.00	R	12.00	R	16.00	R	0.00		0.00		0.00		0.00		503.59
10005	David Black	445566778	<input checked="" type="checkbox"/>		459.21	14.25	W	14.25	R	16.00	R	0.00		0.00		0.00		0.00		503.71
10006	Matthew Gray	998877665	<input checked="" type="checkbox"/>		463.89	12.00	A	12.00	A	16.00	A	0.00		0.00		0.00		0.00		503.89
10007	Christopher Blue	334455667	<input checked="" type="checkbox"/>		464.09	12.00	W	12.00	W	16.00	W	0.00		0.00		0.00		0.00		504.09
10008	Timothy Green	778899001	<input type="checkbox"/>		458.10	14.25	W	14.25	R	19.00	R	0.00		0.00		0.00		0.00		505.60
10009	Kevin Brown	223344556	<input type="checkbox"/>		458.89	14.25	R	14.25	R	19.00	R	0.00		0.00		0.00		0.00		506.39
10010	Andrew White	667788990	<input checked="" type="checkbox"/>		458.98	14.25	R	14.25	R	19.00	R	0.00		0.00		0.00		0.00		506.48
10011	Joseph Black	112233445	<input checked="" type="checkbox"/>		459.08	14.25	R	14.25	R	19.00	R	0.00		0.00		0.00		0.00		506.58
10012	William Green	556677889	<input checked="" type="checkbox"/>		459.08	14.25	W	14.25	W	19.00	W	0.00		0.00		0.00		0.00		506.58

# Lockheed Martin Aero Maximo

- Call In List via Report

Reporting

Page 1 of 1

Tivoli

## Automated Machine Mechanics

Supervisor Group: [blurred]  
 Week Ending: [blurred]  
 Last Update: [blurred]  
 Updated By: [blurred]

Call List Summary			
Order	Name	Phone Number	DNC
1	[blurred]	[blurred]	X
2	[blurred]	[blurred]	X
3	[blurred]	[blurred]	X
4	[blurred]	[blurred]	X
5	[blurred]	[blurred]	
6	[blurred]	[blurred]	X
7	[blurred]	[blurred]	
8	[blurred]	[blurred]	X
9	[blurred]	[blurred]	
10	[blurred]	[blurred]	X
11	[blurred]	[blurred]	
12	[blurred]	[blurred]	X
13	[blurred]	[blurred]	X

May 4, 2023 at 2:50:48 PM CDT

# Observations

- Reduced Errors in Tracking
- Reduced Time spent correcting spreadsheets
- More reliable archives
- Approval from both Supervisors and Craftpersons

# Next Steps

- Roll out to other sites:
  - Fort Worth
  - Palmdale
- Additional Tracking Options
- Additional Reports

# Questions?



# Orange County Utilities

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Solid Waste Call Tracking at OCU



# Today's Presenter



- Cece Ramsey
- Utilities Service Specialist at Orange County Solid Waste



- John Brietz
- Solution Director at Starboard Consulting



# Introduction

- Today we will discuss how OCU uses Maximo to track and manage customer calls and requests related to our solid waste services.
- This presentation will cover the following topics:
  - OCU overview/background
  - Maximo at OCU
  - Solid Waste Customer Service and Call Tracking solution
  - Conclusion and recommendations

# OCU Background & Overview

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OCU has around 1,000 employees and operates in seven divisions: Solid Waste, Water, Water Reclamation, Field Services, Customer Service, Fiscal and Operational Support and Engineering.



Our Solid Waste Division provides contract waste and recycling collection services to more than 230,000 customers in the unincorporated areas of the County..



Each customer receives once per week collection of garbage, recycling, yard waste, and bulky items.



The Solid Waste Division faces many challenges, such as increasing customer expectations, environmental regulations, operational efficiency, and customer satisfaction.

# Maximo at OCU



Maximo is used by OCU to manage its assets, work orders, inventory, contracts, and service requests.



OCU has been using Maximo since 2001 and has about 900 users across the organization.



OCU has upgraded Maximo several times over the years to take advantage of new features and functionalities. The most recent upgrade was in April 2023 to version 7.6.1.



Maximo helps OCU improve its asset management, work planning and scheduling, resource optimization, cost control, compliance reporting, and customer service.

# Solid Waste Call Tracking Overview

- Solid Waste Customer Service is the first point of contact for customers who have questions or issues related to solid waste services.
- Solid Waste Customer Service uses a Maximo-based call tracking solution to record and track customer calls and requests.
- The call tracking solution helps Solid Waste Customer Service improve its efficiency, accuracy, accountability, and responsiveness.



# Our Solution

The call tracking solution allows Solid Waste Customer Service to:

- Capture customer information and call details
  - Assign service requests to the appropriate work groups
  - Monitor the status and resolution of service requests
  - Generate reports and dashboards on call volume, service level, customer feedback, and performance indicators
- 

# Solid Waste Call Tracking

## Find Customer via Address

The screenshot displays the myOCTime Work Order Tracking SWCT interface. The browser tabs include 'myOCTime', 'Work Order Tracking SWCT', and 'Avaya Contact Recorder'. The address bar shows a URL from 'ocudrhmpdap01/maximo/ui/7/event=loadapp&value=ocu\_woswct&uisessionid=3556&\_tt=ab4btu35n1131j5fug31rcng0'. The page title is 'Work Order Tracking SWCT' and the user is identified as 'RAMSEY,CALINNE'.

The interface features a navigation menu on the left with options like 'Go To Applications', 'Available Queries', 'All Records', 'All Bookmarks', 'All Request', 'CECE INPRG', 'Complaints In Request', 'Constant', 'Damaged', 'Inquiry', 'Common Actions', 'New Work Order', 'View Location Work Details S...', 'Change Status', 'Select Owner', 'Take Ownership', 'Create KPI', 'Approve Work Order', 'Initiate Work Order', 'More Actions', 'Auto-Create WO (Spatial)', 'Assign to New Parent', 'Create Work Package', 'Reschedule/Unassign Assignments', 'Attachment Library/Folders', 'SWCT Complaint Report', 'SWCT Cart Request Report', and 'Run Reports'.

The main content area shows a 'Find Work Order' search bar and a navigation menu with options: 'List', 'Work Order', 'Plans', 'Assignments', 'Related Records', 'Actuals', 'Safety Plan', 'Log', 'Specifications', 'Map', and 'Service Address'. Below this is an 'Advanced Search' section with 'Filter', 'Save Query', and 'Bookmarks' options. The table below shows 18 work orders.

Work Order	Description	Address	Problem (Call Type)	Remedy	Status	Reported Date	Zone
18428230	ACS REMINDER TUES 6/13 REC CART:PLACED IN FRONT OF GARAGE	4344 MCDONALD GLEY RD	REMINDER		REQUEST	6/13/23 12:55:18	1
18428183	MISSED FRI 6/9- GARB - 2 ROLL CARTS SKIPPED	1151 MAJESTIC OAK DR	GARBAGE		REQUEST	6/13/23 12:38:31	1
18428348	MISSED MON 6/12 - RECY SKIPPED	913 LIVEOAK LEAF CT	RECYCLE		REQUEST	6/13/23 13:36:20	1
18428221	MISSED MON 6/12 GARB CART	3529 N ORANGE BLOSSOM TRL	GARBAGE		REQUEST	6/13/23 12:52:16	1
18427843	MISSED MON 6/12- GARB 2 WEEKS	14140 BOGGY CREEK RD	GARBAGE		REQUEST	6/13/23 10:31:58	3
18428278	MISSED MON 6/12- REC CART: ENTIRE STREET	1836 E WELCH RD	RECYCLE		REQUEST	6/13/23 13:16:30	1
18428396	MISSED MON 6/12: YW: 1 BUNDLE	7190 CITRUS AVE	YARD		REQUEST	6/13/23 14:00:25	4
18428180	MISSED TUES 6/13 GARB CART	1829 CYPRESS RIDGE DR	GARBAGE		REQUEST	6/13/23 12:37:32	4
18428320	MISSED MON 6/12: GARB CART : THE TRUCK LEFT A PLASTIC BAG CUSTOMER P/U	14237 SERANOVA DR	GARBAGE		REQUEST	6/13/23 13:27:06	3
18428203	REMAINDER TUE 6/13: 12 CARDBOARD BOXES	2603 SHANNON RD	REMINDER		REQUEST	6/13/23 12:46:43	4
18428249	REMINDER TUES 6/13 BULK LUMBER CUT DOWN STILL OUT	7759 LAKE ANDREA CIR	REMINDER		REQUEST	6/13/23 13:04:08	1
18428172	REMINDER TUES 6/13 MATTRESS: MISSED LAST WEEK	9794 LAKE GEORGIA DR	REMINDER		REQUEST	6/13/23 12:28:38	5
18427904	REMINDER TUES 6/13 REC ONLY ONE SIDE OF THE STREET WAS SERVED	617 OAK MANOR CIR	REMINDER		REQUEST	6/13/23 10:56:59	4
18428053	REMINDER TUES 6/13 YW: 7 BAGS	3905 ALLEN AVE	REMINDER		REQUEST	6/13/23 11:42:59	1
18428429	REMINDER TUES 6/13: BULK ITEMS: CARPET: BROKEN FURNITURE	13400 TEXAS WOODS CIR	REMINDER		REQUEST	6/13/23 14:11:56	3
18428240	REMINDER TUES 6/13: GARB CART: TAG IF NOT IN COMPLIANCE; BROKEN LID	343 FLYROD CIR	REMINDER		REQUEST	6/13/23 13:01:44	4
18428374	REMINDER TUES 6/13: REC CART SKIPPED	14237 SERANOVA DR	REMINDER		REQUEST	6/13/23 13:51:53	3
18428135	REMINDER TUES 6/13: REC CART: MISSED LAST WEEK	443 CHARLESWOOD AVE	RECYCLE		REQUEST	6/13/23 12:13:46	4

At the bottom of the table, there is a checkbox labeled 'Select Records'.

# Solid Waste Call Tracking

## Find Customer via Address

Work Order	Description	Address	Problem (Call Type)
<a href="#">18428230</a>	<a href="#">ACS REMINDER TUES 6/13 REC CART;PLACED IN FRONT OF GARAGE</a>	4344 MCDONALD GLEY RD	REMINDER
<a href="#">18428183</a>	<a href="#">MISSED FRI 6/9- GARB - 2 ROLL CARTS SKIPPED</a>	1151 MAJESTIC OAK DR	GARBAGE
<a href="#">18428348</a>	<a href="#">MISSED MON 6/12 - RECY SKIPPED</a>	913 LIVEOAK LEAF CT	RECYCLE
<a href="#">18428221</a>	<a href="#">MISSED MON 6/12 GARB CART</a>	3529 N ORANGE BLOSSOM TRL	GARBAGE
<a href="#">18427843</a>	<a href="#">MISSED MON 6/12- GARB 2 WEEKS</a>	14140 BOGGY CREEK RD	GARBAGE

# Solid Waste Call Tracking

## Verify Customer via Map

Manage Accounts | Orange County Property Appraiser | Locations SWCT

Not secure | ocdhrmxdap01/maximo/ui/?event=loadapp&value=ocu\_loswct&uisessionid=3706&\_t=b4ga3k2ak7sckpm4286mih5n

Locations SWCT | RAMSEY,CALINNE

Find Location

Find Navigation Item

Go To Applications

Available Queries

All Records

All Bookmarks

Common Actions

- Save Location
- Clear Changes
- Create WO SWCT
- View Work Details SWCT
- Create Report

More Actions

- View History
- Create
- Open Drilldown
- Associate Systems with Location
- Manage Systems
- Apply Item Assembly Structure
- View/Modify Parents
- View Work Details
- View Contracts
- View Tickets
- Enter Meter Readings
- Manage Meter Reading History
- Reset/Replace Meters
- Location Availability
- Associate Users and Custodians
- Associate Services
- Manage Location Collections
- Attachment Library/Folders
- Add to Bookmarks

List | Call Tracker | Location | Assets | Safety | Meters | Specifications | Map

Location: 292310742006 1335 43RD ST Status: OPERATING Feature Class: GISPARCELSVJSON Attachments

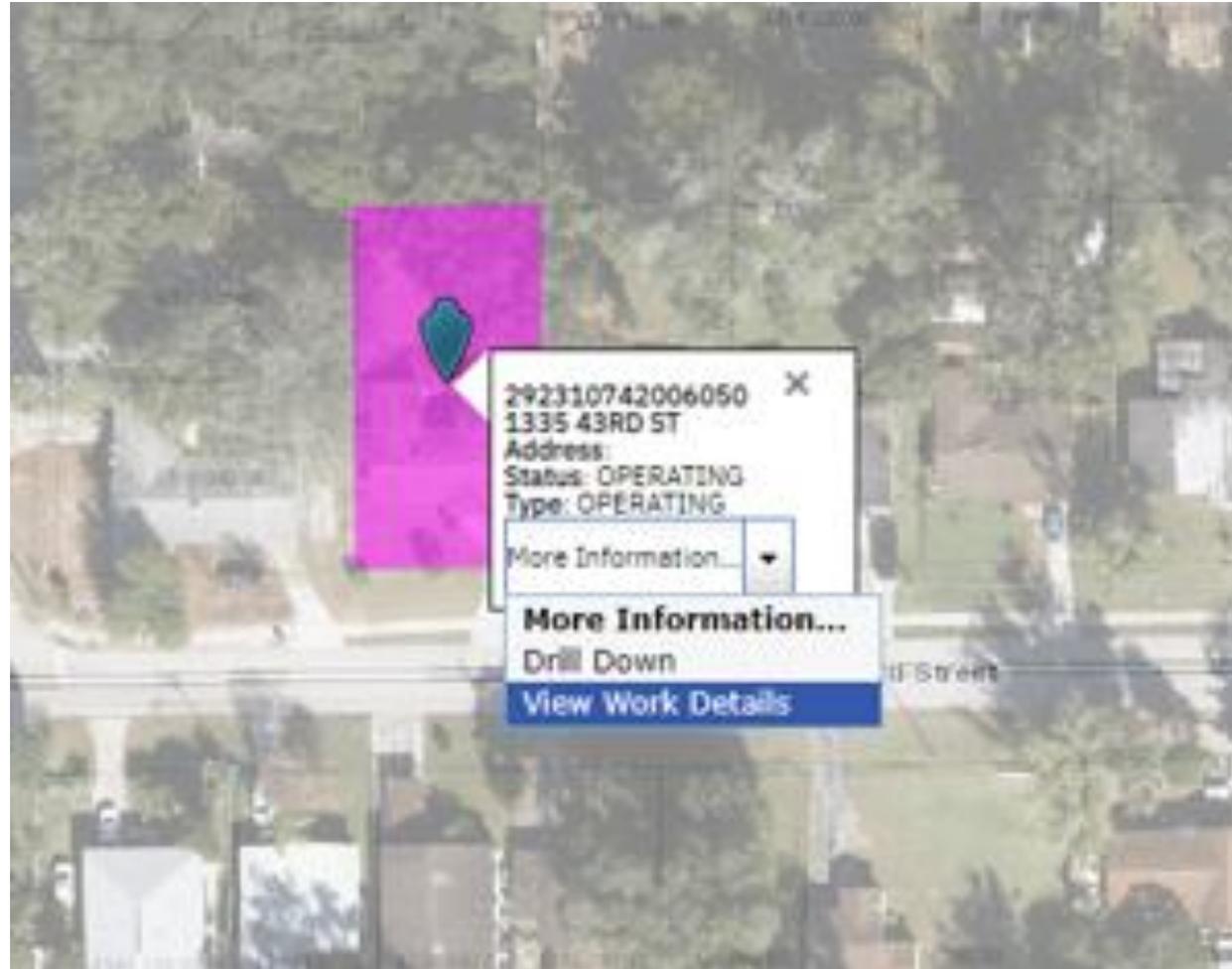
292310742006050 - 1335 43RD ST

292310742006050  
1335 43RD ST  
Address  
Status: OPERATING  
Type: OPERATING

More Information...  
Drill Down  
View Work Details

# Solid Waste Call Tracking

## Verify Customer via Map



# Solid Waste Call Tracking Work Order

Work Order Tracking SWCT

Find Work Order: 18427669

Assign Work Order

Work Order: 18427669  
Description: REMINDER WED 6/14; GARB BAGS; WAITING FOR R...  
Priority: 3  
Status: INPRG  
Location: 312408855902

Task	Description	Crew Type	Craft	Skill Level	Labor	Crew	Scheduled Start	Hours	Status
There are no rows to display.									

New Row

OK Cancel

18427669  
REMINDER WED 6/14; GARB BAGS; WAITING FOR ROLL CART  
Address:  
Status: INPRG  
Asset:  
Location: 312408855902300  
More Information...

# Solid Waste Call Tracking Complaint Report

Reporting

Page 1 of 1

ORANGE COUNTY UTILITIES  
EXTERNAL COMPLAINT REPORT

DATE: 13-Jun-2023  
 REPORT BATCH: 138485  
 FROM: CALINNE RAMSEY  
 HANDLER: FCC  
 ZONE: 4

PROBLEM	SUBDIVISION	ADDRESS	PROBLEM2	NAME	PHONE	WORK ORDER	REPORTED BY	COMMENTS	MISSED DATE
RECYCLER	HILSBEE GARDENS SEC 4	617 Oak Water Cr	RECYCLE	Conrad Martin K Jr	407-959-8066	1842704	CHARTER1	REINVOYER TUES 6/13 REC ONLY ONE EDGE OF THE STREET WAS SERVED	06/13/2023
RECYCLE	DEERWOOD UT 2	243 Deerwood Ave	MISSED	resident	931-237-7323	18428135	DRANSE01	REINVOYER TUES 6/13 REC CART MISSED LAST WEEK	06/13/2023
GARBAGE	CYPRESS SPRINGS UT 2	1829 Cypress Ridge Dr	MISSED	REBECCA	407-283-5412	18428180	NICALDERO	MISSED TUES 6/13 GARB CART	06/13/2023
REINVOYER	PELHAM PARK LOT ADD	2603 Sherman Rd	BULK	Beaton	347-330-0459	18428203	DRIVERA	REINVOYER TUE 6/13 BULK 12 CARDBOARD BOXES	06/13/2023
REINVOYER	FILLOSTREAM PH 1 SEC B	1 243 Filrod Cr	GARBAGE	Brammer David	754-234-9331	18428240	DRANSE01	REINVOYER TUES 6/13 GARB CART TAG IF NOT IN COMPLIANCE: BROKEN LTD	06/13/2023
YARD	WRENWOOD HOTE	7190 Citrus Ave	MISSED	Pamela Wilfredo A	306-383-0532	18428396	SRENNV01	MISSED MON 6/12 YW 1 BUNDLE	06/12/2023

Total Garbage Complaints: 1  
 Total Recycle Complaints: 1  
 Total Yard Complaints: 1  
 Total Reminder Complaints: 3  
 Total Bulk Complaints: 0  
 Total Complaints: 6  
 6/13/23 14:19:33

ORANGE COUNTY GOVERNMENT

# Solid Waste Call Tracking Complaint Report

## ORANGE COUNTY UTILITIES EXTERNAL COMPLAINT REPORT

**DATE:** 13-Jun-2023  
**REPORT BATCH:** 138485  
**FROM:** CALINNE RAMSEY  
**HAULER:** FCC  
**ZONE:** 4

<u>PROBLEM</u>	<u>SUBDIVISION</u>	<u>ADDRESS</u>	<u>PROBLEM2</u>	<u>NAME</u>	<u>PHONE</u>	<u>WORK ORDER</u>	<u>REPORTED BY</u>	<u>COMMENTS</u>	<u>MISSED DATE</u>
REMINDER	VALENCIA GARDENS SEC 4	617 Oak Manor Cir	RECYCLE	Connell Martin K Jr	407-595-8066	18427904	CMART01	REMINDER TUES 6/13 REC ONLY ONE SIDE OF THE STREET WAS SERVED	06/13/2023
RECYCLE	DEERWOOD UT 2	443 Charleswood Ave	MISSED	resident	931-237-7323	18428135	DRAMSE01	REMINDER TUES 6/13; REC CART; MISSED LAST WEEK	06/13/2023

# Solid Waste Call Tracking Complaint Report

myOCTime | Work Order Tracking SWCT | BIRT Report Viewer | Avaya Contact Recorder

Not secure | ocudrhmxpdap01/maximo/report?\_report=oc\_u\_swextcmp\_reprint.rptdesign&appName=OCU\_WOSWCT&\_requestid=1686680742517&uisessionid=3556&csrftoken=gfr7rsotip3ppkot80dh4pic22

Reporting

Page 1 of 1

**ORANGE COUNTY UTILITIES  
EXTERNAL COMPLAINT REPORT REPRINT**

**DATE:** 13-Jun-2023  
**REPORT BATCH:** 138485  
**FROM:**  
**HAULER:** FCC  
**ZONE:** 4

PROBLEM	SUBDIVISION	ADDRESS	PROBLEM2	NAME	PHONE	WORK ORDER	REPORTED BY	COMMENTS	MISSED DATE
REMINDER	VALENCIA GARDENS SEC 4	617 Oak Manor Cir	RECYCLE	Connell Martin K Jr	407-595-8066	18427904	CMART01	REMINDER TUES 6/13 REC ONLY ONE SIDE OF THE STREET WAS SERVED	06/13/2023
RECYCLE	DEERWOOD UT 2	443 Charleswood Ave	MISSED	resident	931-237-7323	18428135		REMINDER TUES 6/13 REC ONLY ONE SIDE OF THE STREET WAS SERVED	06/13/2023
REMINDER	CYPRESS SPRINGS UT 2	1829 Cypress Ridge Dr	GARBAGE	REBECCA	407-283-9412	18428180			
REMINDER	PELHAM PARK 1ST ADD	2603 Shannon Rd	BULK	Beaton	347-350-0459	18428203			
REMINDER	FIELDESTREAM PH 1 SEC 8	343 Flyrod Cir	GARBAGE	Branker David	754-234-9351	18428240			
YARD	WRENWOOD HGTS	7190 Citrus Ave	MISSED	Pomales Wilfredo A	306-383-0532	18428396			

**Export Report**

Export Format:  XLSX Microsoft 2007 Spreadsheet

Pages:  All pages ( Enter page # )

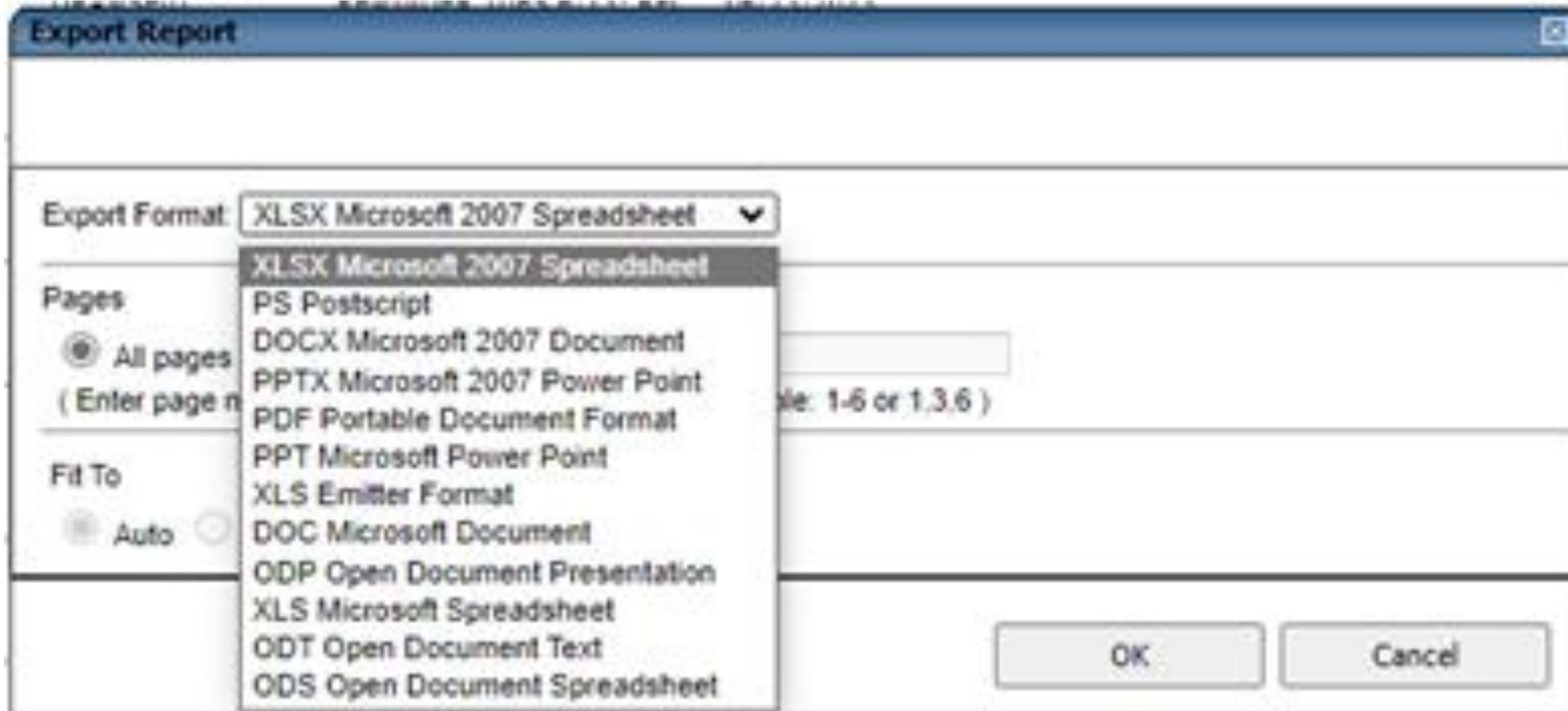
Fit To:  Auto

OK Cancel

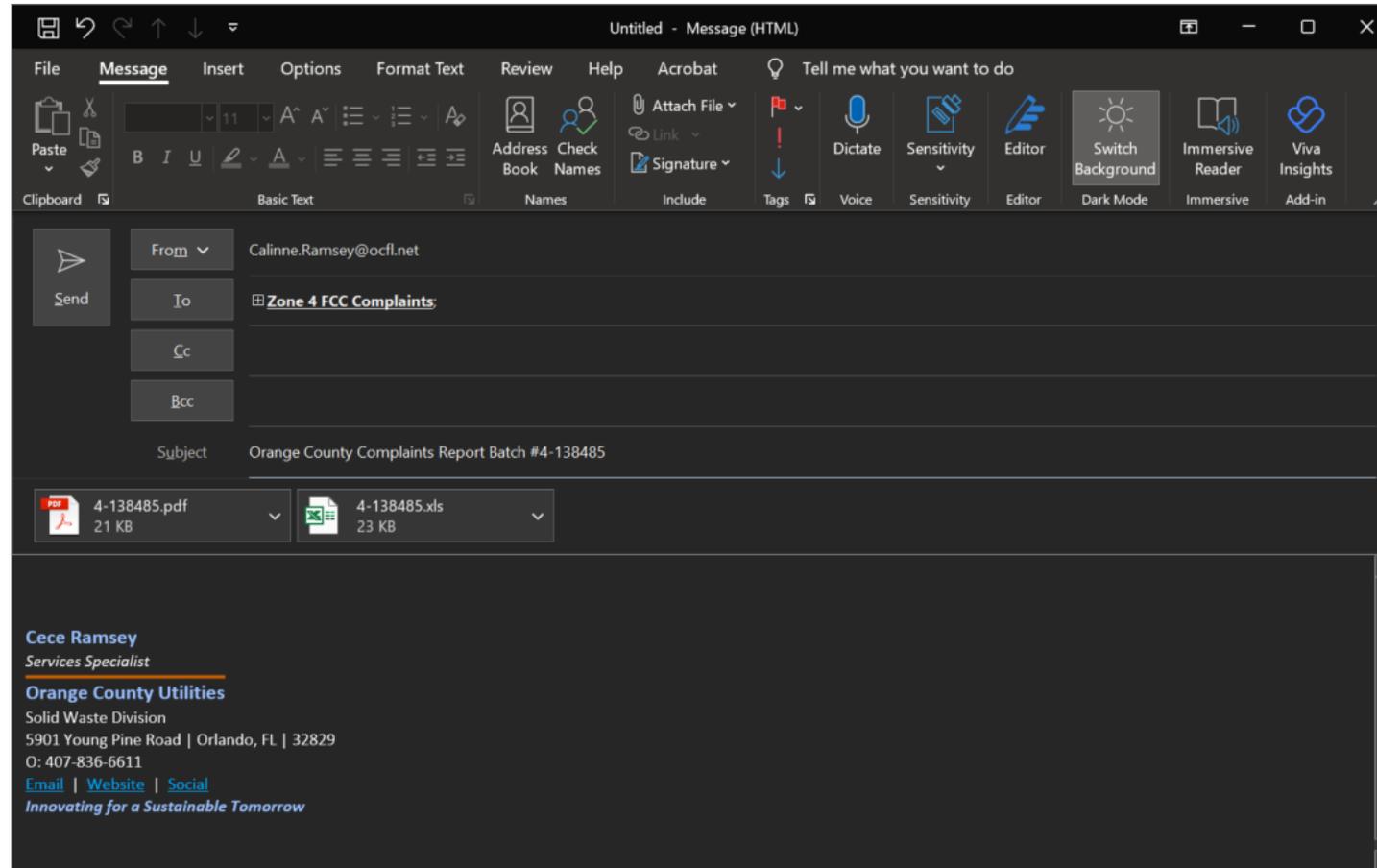
**Total Garbage Complaints:** 0  
**Total Recycle Complaints:** 1  
**Total Yard Complaints:** 1  
**Total Reminder Complaints:** 4  
**Total Bulk Complaints:** 0  
**Total Complaints:** 6  
 6/13/23 14:24:00

1 / 1

# Solid Waste Call Tracking Complaint Report



# Solid Waste Call Tracking Complaint Report – Send to Hauler



# Conclusion

---

- In conclusion, Maximo is a valuable tool that helps OCU manage its solid waste operations and provide quality service to its customers.
- The call tracking solution enables Solid Waste Customer Service to handle customer calls and requests effectively and efficiently.

# IBM Maximo Application Suite Overview

## Manage Roadmap



# IBM

June 2023

Dave Gasdia

Program Director

IBM Maximo Product Management

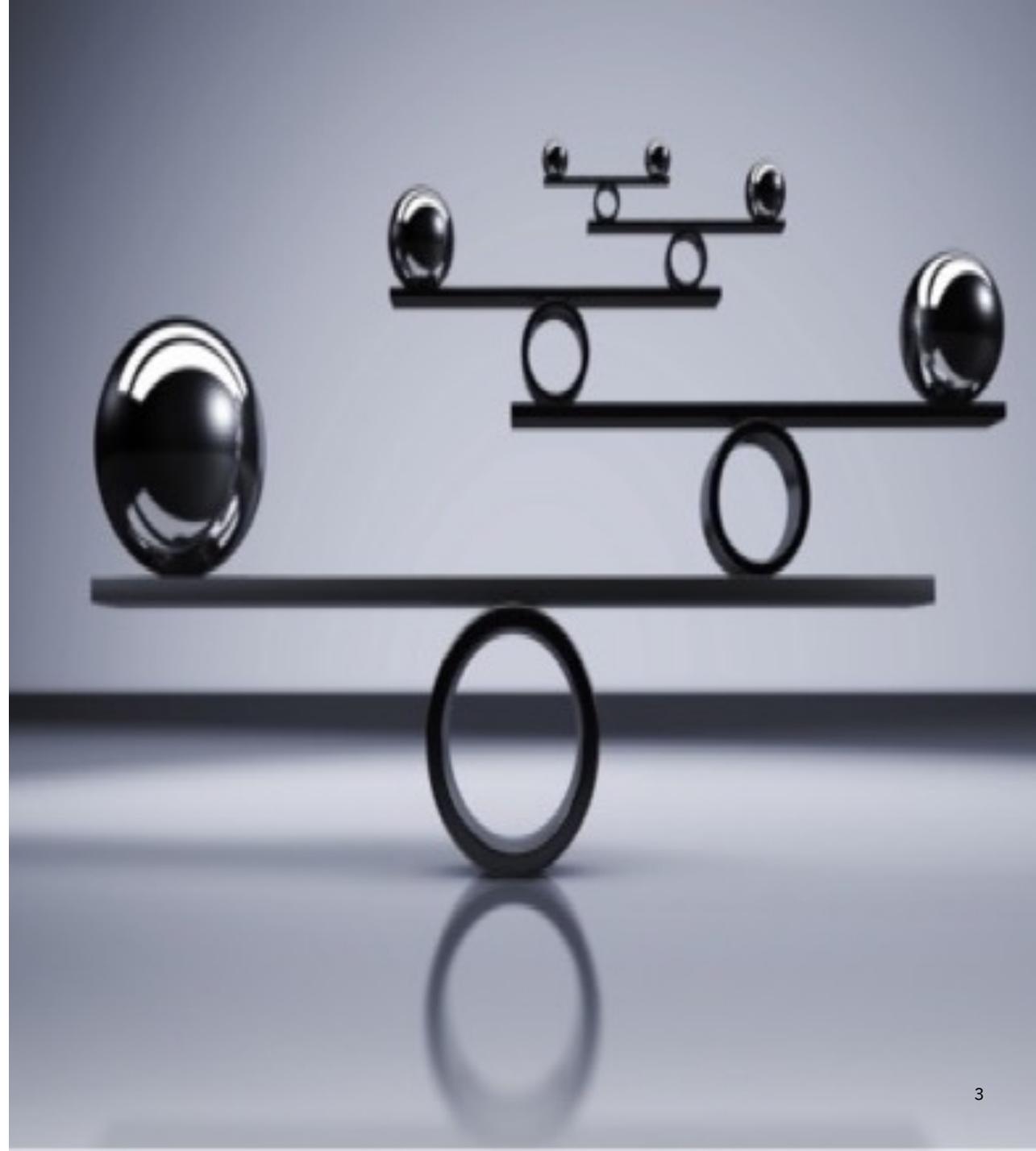
[drgasdia@us.ibm.com](mailto:drgasdia@us.ibm.com)

# Please Note:

- IBM's statements regarding its plans, directions, and intent are subject to change or withdrawal without notice at IBM's sole discretion.
- Information regarding potential future products is intended to outline our general product direction and it should not be relied on in making a purchasing decision.
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# Roadmap Topics

- Introduction
- Maximo Application Suite (MAS) – release 8
- MAS Licensing model
- Strategic direction and roadmap
- Q&A



# Maintenance strategies differ by asset class

## Asset Management Strategy and Maturity Model: Asset utilization and availability

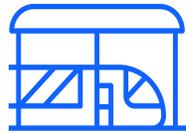
The asset strategy and maturity changes depending on factors including asset/replacement cost, criticality of asset, usage patterns and impact of failure on safety, environment, operations, financial and public image.



**Reactive**



**Run-to-failure**



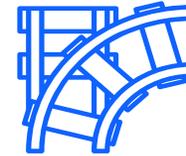
**Calendar based**



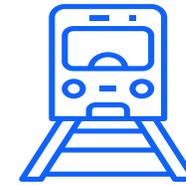
**Usage based**



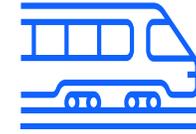
**Condition based**



**Risk-base maintenance**



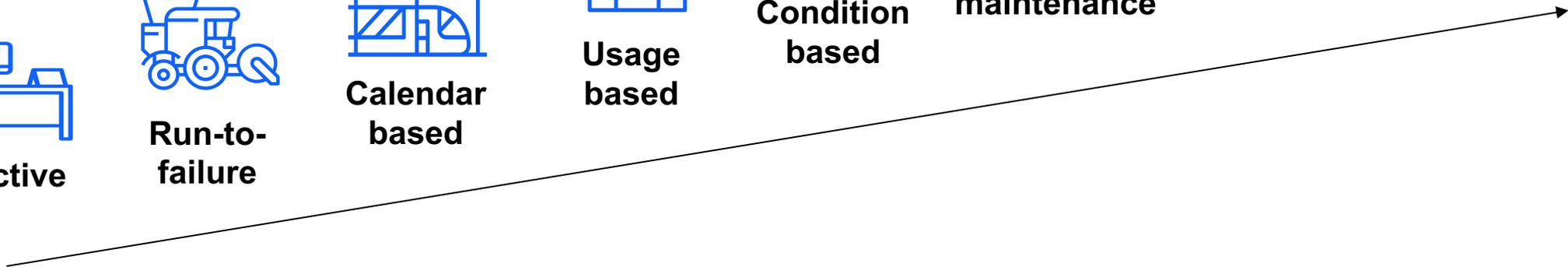
**Predictive**



**Financially optimized**

**Risk Mitigation**

**Financial Optimization**



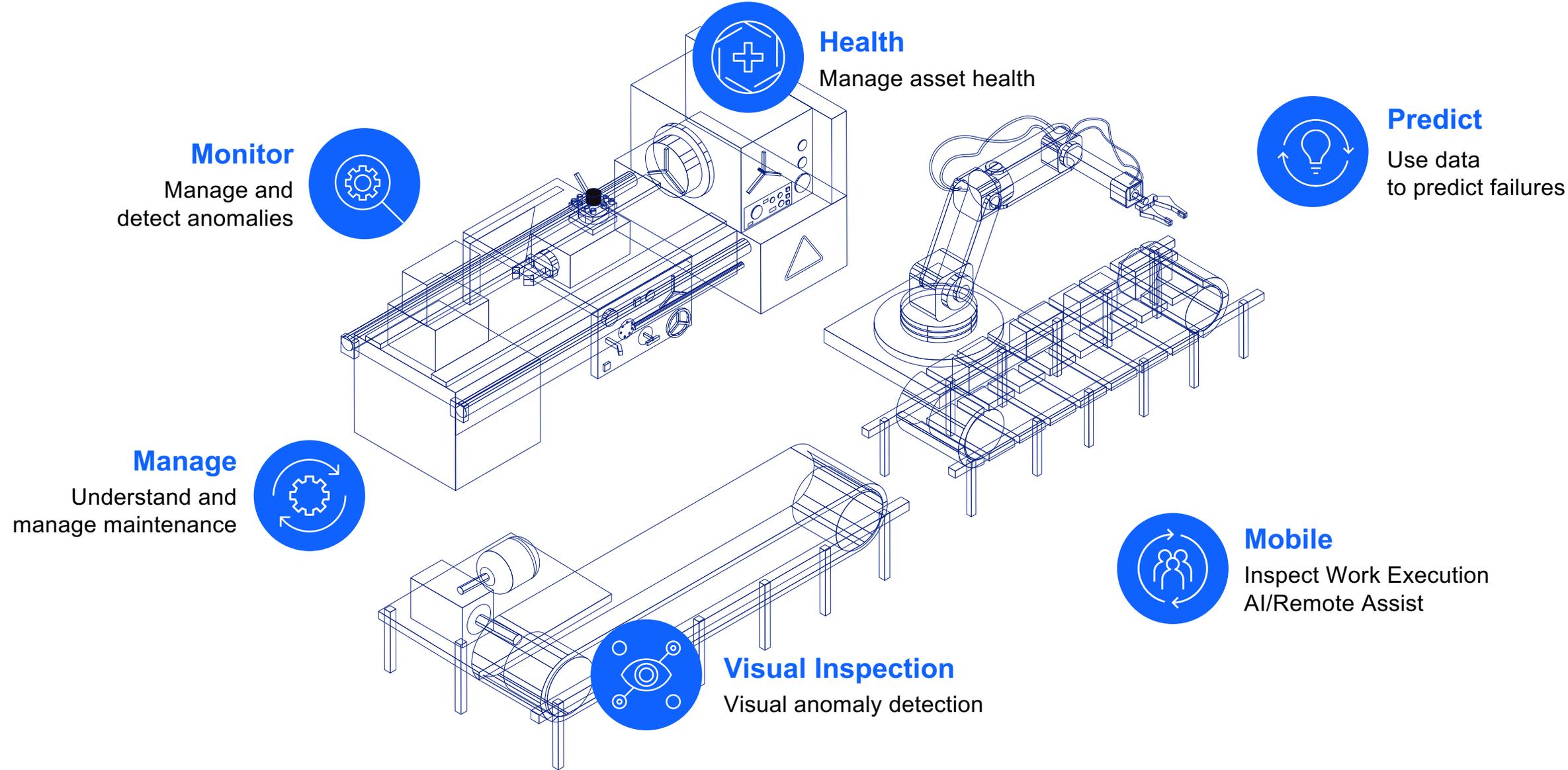
**Asset value and business impact**

Maintenance is an expense

Maintenance is an investment

**Data driven decisions (analytics)**

# Driving the Automation Journey



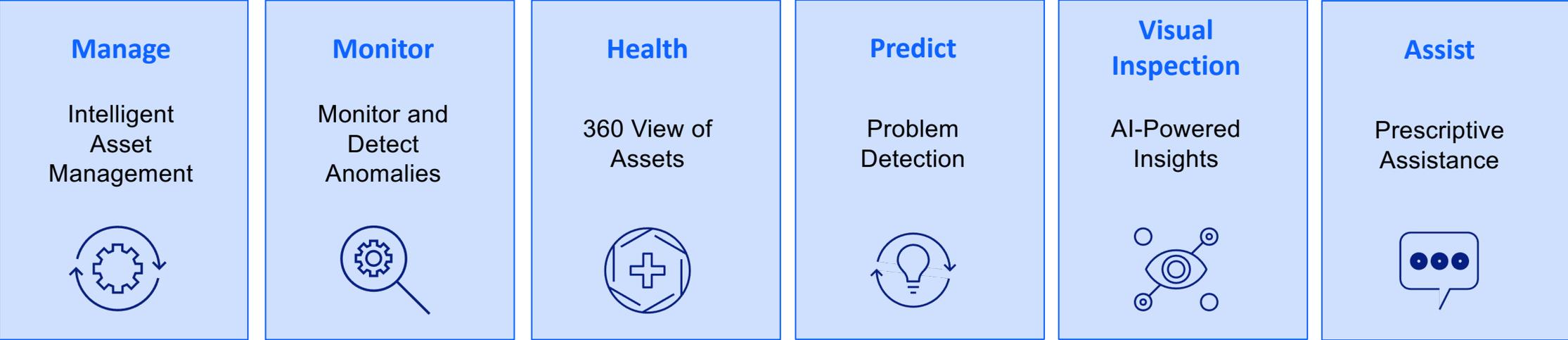
# Maximo Application Suite

Accelerate your transformation journey while lowering total cost of ownership

- Improved usability with a unified look and feel
- Single entitlement across the suite
- Ease of implementation with OpenShift containers
- Provides industry-leading capabilities and functionalities

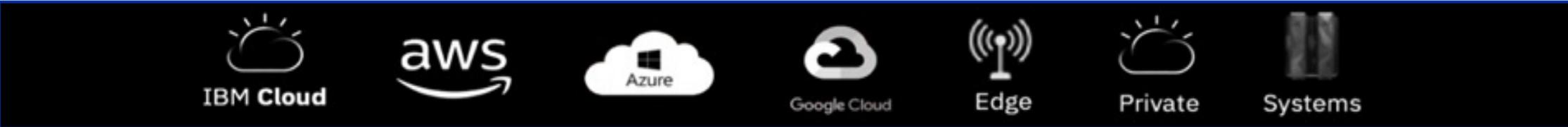
# Maximo Application Suite

*Best of class capabilities to provide complete view of your assets*



IBM Cloud Pak for Data | IBM Watson Studio | IBM Watson ML | IBM Watson Discovery | IBM Watson Assistant | IBM App Connect | IBM Cognos Analytics

 **Red Hat OpenShift** Infrastructure Independent Common Operating Environment

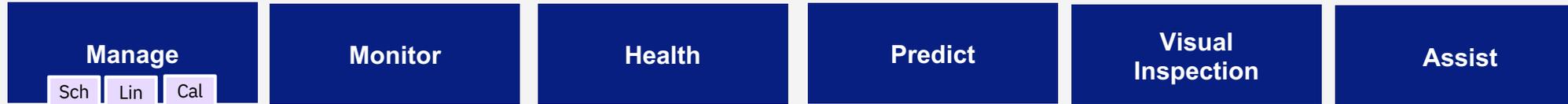


# Maximo Application Suite Deployment Options

Deployment	Availability	Procure	Provision & Operate	Client Benefits
<b>On Premise</b> Customer Managed	<b>Now</b>	Client purchases MAS from IBM Client provides infrastructure	Client provisions, manages, and operates full stack	<ul style="list-style-type: none"> <li>• Maximum operational flexibility</li> </ul>
<b>Hyperscalers</b> Customer Managed	<b>Now</b> AWS 1Q22 Azure 2Q22	<b>BYOL</b> Client purchases software from IBM and infrastructure from Hyperscalers	Client runs IBM-provided automation scripts to deploy MAS on Hyperscalers' cloud  Client manages and operates both software and infrastructure	<ul style="list-style-type: none"> <li>• Simplifies procurement and deployment</li> <li>• Allows client to select their Hyperscalers</li> <li>• Flexibility for clients to manage and operate their environment</li> </ul>
	<b>Now</b> AWS 3Q22 Azure 4Q22	<b>Paid (Marketplace listing)</b> Client purchases software and infrastructure from Hyperscalers		
<b>SaaS</b> IBM Managed	<b>Now</b> AWS 3Q22	Client purchase single part (includes software, infrastructure, and operations) from <u>either</u> IBM or AWS Marketplace (Subscription only License)	IBM provisions, manages, and operates Client's MAS environment on AWS Cloud using IBM's AWS cloud account	<ul style="list-style-type: none"> <li>• Reduced time-to-value</li> <li>• Reduced operational costs</li> <li>• Allows clients to focus on business priorities</li> </ul>
<b>Dedicated (Managed Service)</b> IBM Managed	<b>Now</b> IBM 2021 AWS 1Q23	Client purchases software (subscription or perpetual) and managed service (including infrastructure) from IBM	IBM provisions, manages, and operates Client's MAS operational environment on IBM Cloud or AWS in an IBM owned account. Client Manages Functional application environment.	<ul style="list-style-type: none"> <li>• Simplifies deployment and operations</li> <li>• Provides more flexibility, than SaaS, to customize environment</li> <li>• Provides more operational flexibility than SaaS</li> </ul>

# Maximo Application Suite Catalog

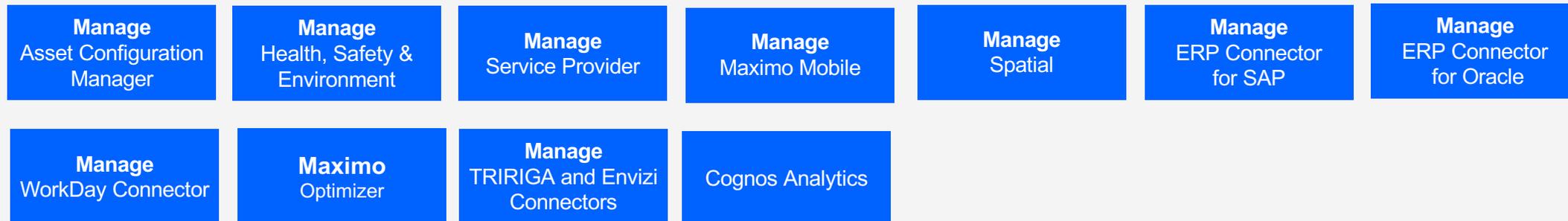
## MAS Applications



## MAS Industry Solutions



## MAS Add-on Solutions



## MAS Integrations and Add-ons – separate part purchase



# Simplified Licensing and Usage

MAS AppPoints will be used across suite

*Entitlement covers the whole suite. AppPoints are expended based primarily upon different active User types and installs.*

## 1. Single license

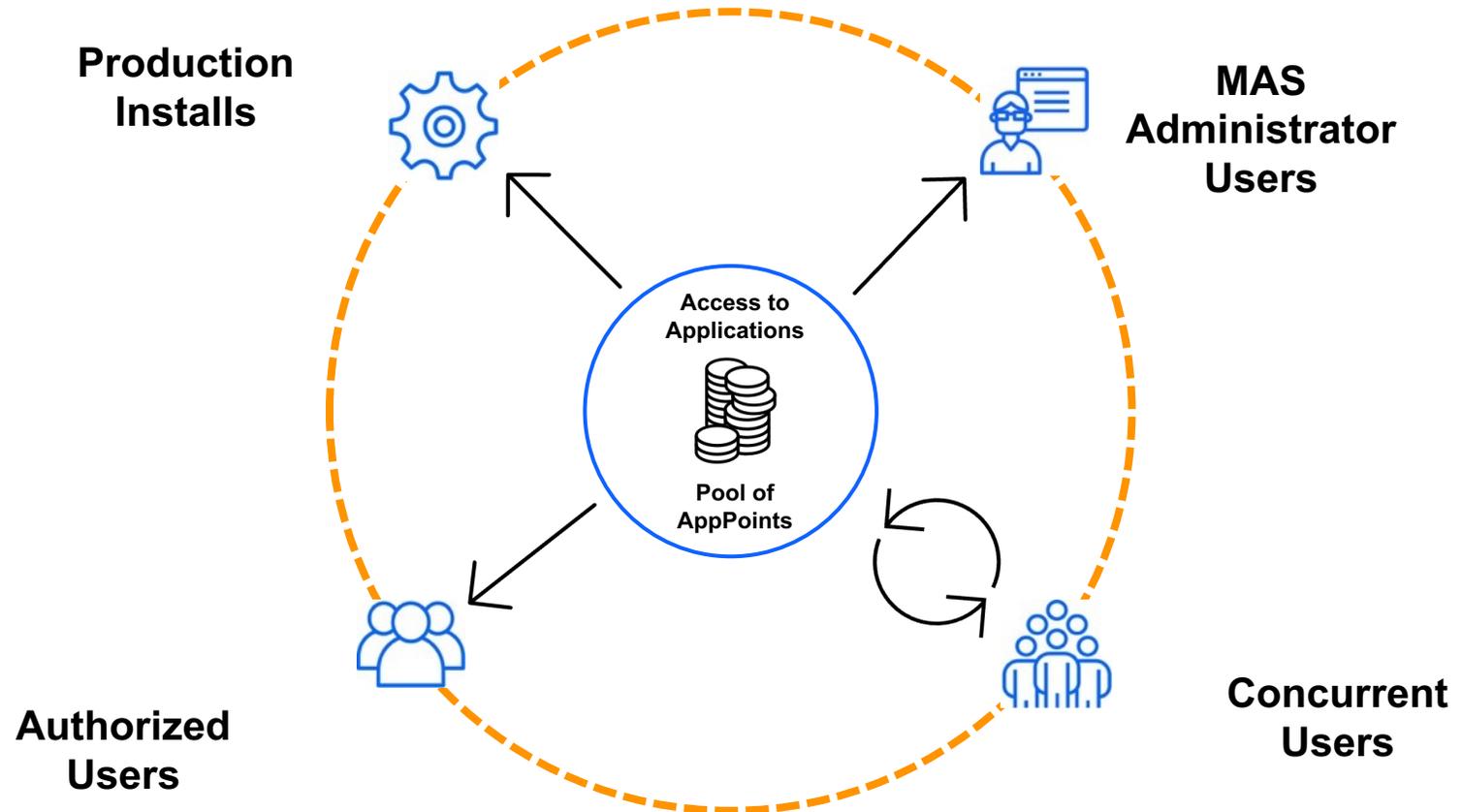
One entitlement to entire Suite

## 2. Flexible consumption

Sharing of license through concurrent users

## 3. Simplified usage

Access applications without additional provisioning



# MAS LICENSE MODEL

- 4 User types
- Authorized & Concurrent
- Install based

### Self Service User

Free  
**0 AppPoints**

**Self Service Applications**

- Service Requests
- Desktop Requisitions
- Requests (Oil & Gas)
- Create/Review Incidents (HSE)
- Vehicle Requests (Transportation)
- Graphical Appt Book (Scheduler)
- Bill review (Service Provider)

### Limited User

Concurrent <b>5 AppPoints</b>	Authorized <b>2 AppPoints</b>
----------------------------------	----------------------------------

**3 Modules:**

- Manage
- Manage Industry Solutions
- Manage Add-ons

**Mobile**

- Maximo Mobile
- Assist
- 3<sup>rd</sup> Party

**Monitor**

### Base User

Concurrent <b>10 AppPoints</b>	Authorized <b>3 AppPoints</b>
-----------------------------------	----------------------------------

**Manage**

Includes:

- Linear
- Calibration
- Spatial (requires install)
- Scheduler

**Health**

### Premium User

Concurrent <b>15 AppPoints</b>	Authorized <b>5 AppPoints</b>
-----------------------------------	----------------------------------

**Manage**

**Industry Solutions**

- Oil & Gas, Aviation, Transportation, Utilities, Nuclear, Civil Infrastructure

**Add-ons**

- Asset Configuration Manager, Service Provider, Health, Safety & Environment

**Predict**

**Health and Predict - Utilities**

**Visual Inspection**

<b>Install – 1 AppPoint</b> (x multiplier) Production Only	SAP/Oracle/Workday Connector (x80)	Spatial (x20)	Civil Infrastructure (x50)	Visual Inspection (x45) Edge (1)	Assist (x150)	Health & Predict Utilities (x60)	Optimizer / Optimizer Limited (x220) / (x60)
--	--	------------------	-------------------------------	-------------------------------------	------------------	--	--

# Focusing on key capabilities for 2023 and 2024



## Expand purchase and deployment choices

Easily deploy MAS into AWS & Azure via marketplace integration.

Purchase MAS as a SaaS offering hosted on AWS

Single Node Openshift for smaller footprint installs

Broader DevSecOps capabilities leveraging Red Hat Openshift.



## Deliver AI driven asset performance @ Scale

Significant enhancement of ingestion and rendering of large datasets from IoT sensors and operational data.

AI Driven insights delivered where and when needed.



## Streamline the EAM to MAS migration experience

End to end migration support with a focus on providing new differentiated value in Manage and the Suite.



## Deliver user experiences that increase operational effectiveness

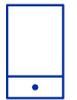
Expand the user experience aligning asset management roles with AI enhanced processes for managers, schedulers, dispatchers and mobile users.



## Extend and enhance our Industry Solutions

Bring new user experiences to key roles and expand Industry Solutions to leverage MAS capabilities of value to industry customers.

# Maximo Application Suite

 <p><b>Manage</b> Intelligent Asset Management</p>	 <p><b>Monitor</b> Monitor and Detect Anomalies</p>	 <p><b>Health</b> 360 View of Assets</p>
 <p><b>Predict</b> Predictive Failures</p>	 <p><b>Visual Inspection</b> AI-Powered Insights</p>	 <p><b>Schedule</b> Schedule Work and Resources</p>
 <p><b>Mobile</b> Technician Work Execution</p>	 <p><b>Assist</b> Prescriptive Assistance</p>	 <p><b>Industry Solutions</b> Accelerate Time to Value</p>

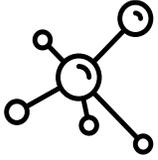
## Intelligent Enterprise Asset Management solution to help organizations:

- 1 Manage assets, infrastructure, and resources
- 2 Monitor and measure operations
- 3 Improve product and service quality

### Personas

- Technicians
- Technician Supervisor
- Asset Maintenance Manager
- Plant Manager
- Fleet Manager
- Operations Manager
- Reliability Engineer
- Quality Manager
- Planners / Schedulers
- Dispatchers
- Purchasing Managers

# Deliver AI driven asset performance @ Scale



## Monitor

### Monitoring with AI-based Anomaly Detection at Enterprise-Scale

- Rapid data integration
- Scalable dashboard filtering and management
- Enterprise-wide view of operation
- Generate work orders based on prioritized alerts



## Health

### Reduce fleetwide operational risk by focusing on the right assets

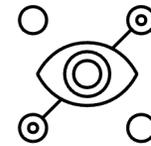
- Consolidated global view of assets
- Flexible health scoring by asset type or groups
- Refurbish vs Replacement Planning
- Reduce unnecessary preventive maintenance



## Predict

### Identify asset failure and improve maintenance practices and reliability

- Templates to build common predictive models
- Determine factors that contribute to failure and build failure models
- Score predictive models using Watson ML
- View pre-built visualizations



## Visual Inspection

### Unleash the power of computer vision for inspection automation

- Visual inspection of the line or asset using commercial, off-the-shelf devices such as iPads and iPhones
- Identify potential quality and performance issues in real time and configure to notify key stakeholders immediately
- Integrate with maintenance and quality workflows for a fast and prescriptive response

# MAS/Manage Roadmap – 2023

IBM Continuous Delivery model

## MAS 8.8/8.9 2022

Inventory Count Books  
Spatial - Indoor Mapping

### Role Based Apps

- Scheduling Dashboard
- Operational Dashboard

### MAF Configuration

- UI Control Preview
- Ability to use deploy dates
- Full page Component rendering
- Support of MAF non-Mobile applications

### Manage Mobile Apps

- Current Mobile App enhancements
- Storeroom Clerk – Inventory Counting
- Defect App
- Asset Manager/Auditor

### Serviceability /Security/Currency

- Operator maturity model enhancements
- Improved logging options
- Autoscripting Enhancements

### Civil Infrastructure enhancements

- Mobile Issue Collection with integration to MVI for Bridge Defects
- Drone Mission table in Manage
- Asset Classification Sample for Bridge
- Regional Asset Manager View – Health of Structures on a Map
- Drone Image Upload/Drone Application Alpha
- Linear Road and Rail Defects/Closure Planning
- Key Bridge Asset Template w/ Inspection Forms

## MAS 8.10 Mar. 2023

### Role Based Apps

- Scheduler Dashboard enhancements
- Dispatching Dashboard
- Operational Dashboard enhancements

### MAF Configuration

- Component view inter-activity with Properties Editor
- Add UI guided features to support App Upgrade process

### Manage Mobile Apps

- Current Mobile App enhancements
  - Addition of E-sig to Technician App
- Storeroom Clerk - Receiving

### Serviceability /Security/Currency

- Operator maturity model enhancements

### Reporting

- Cognos 11.2

### IS enhancements

- RBA and mobile apps
- Civil Infrastructure enhancements

## MAS 8.y Q3 2023

### Role Based Apps

- Scheduler/Dispatcher enhancements
- Operational Dashboard
  - Operations enhancements
- MMI (Manage Monitoring Information)
- New Inspection Forms

### MAF Configuration

- Drag & drop configuration

### Manage Mobile Apps

- Current Mobile App enhancements
  - Addition of Calibration to Technician App
- Storeroom Clerk - Issues & Returns

### Serviceability /Security/Currency

- Operator maturity model enhancements

### Reporting

- Cognos enhancements

### IS enhancements

- RBA and mobile apps
- Civil Infrastructure enhancements

### MAS

- FISMA

## MAS 8.z Q1 2024

### Role Based Apps

- Scheduler/Dispatcher enhancements
- Operational Dashboard
  - HSE enhancements
- New Dataloader

### MAF Configuration

- Tool Palette
- DataSource Assignment
- Data Dictionary Searching

### Manage Mobile Apps

- Current Mobile App enhancements
- Desktop Requisition

### Serviceability /Security/Currency

- Operator maturity model enhancements

### IS enhancements

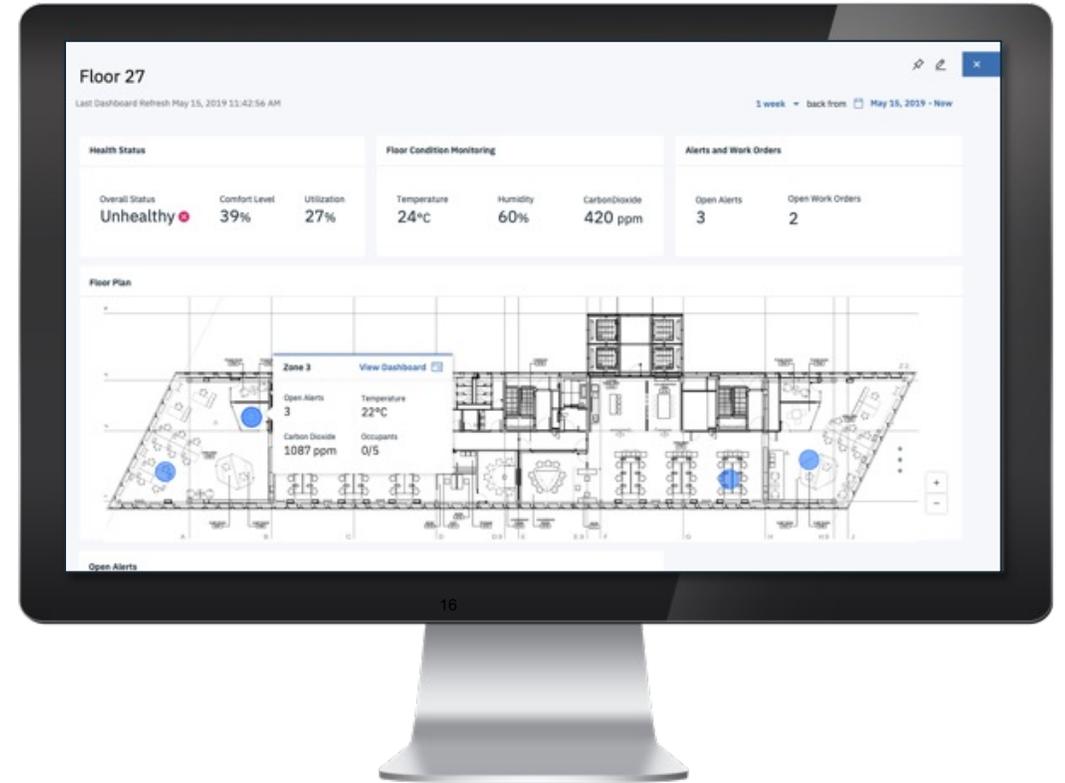
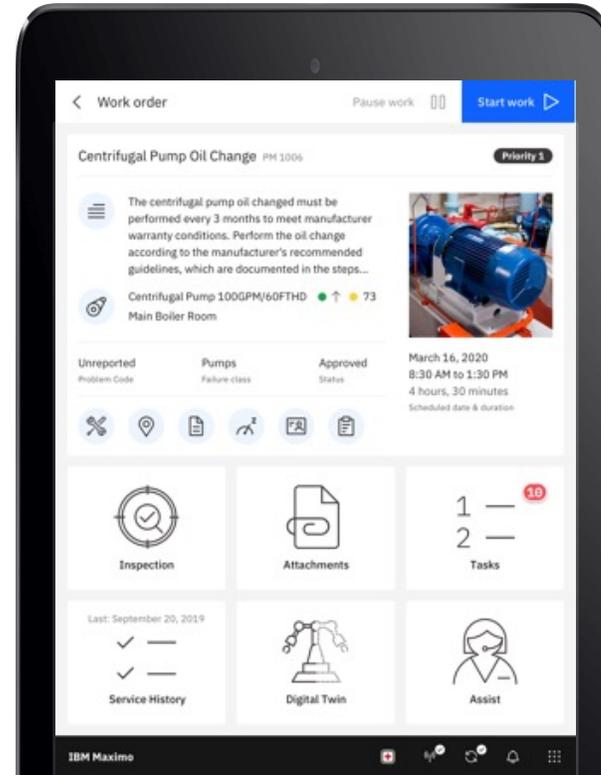
- RBA and mobile apps
- Civil Infrastructure enhancements

### MAS

- FedRamp

# Modernized User Interface

*Easy navigation, common controls and visualization*



# Updated Look and Feel

- *Maximo Application Suite Manage*

## Updated Search Navigation

Collapsed Left side Navigation allows more screen real estate

The screenshot displays the Maximo Work Order Tracking application. On the left, a dark navigation menu is collapsed, showing a search bar and a list of categories including Start Center, Financial, IT Infrastructure, Integration, Inventory, Planning, and Work Orders. The 'Work Orders' category is selected, and a sub-menu is visible with options like Work Order Tracking, Labor Reporting, and Quick Reporting. The main content area shows a table of work orders with columns for Work Order ID, Description, Is Task?, Location, Asset, and Scheduled Start. A search bar at the top right of the table is active, and a dropdown menu is open, listing options such as 'More Search Fields', 'Where Clause', 'Attribute Search', 'View Search Tips', 'Save Current Query', 'View/Manage Queries', and 'Bookmarks'. The IBM logo is visible in the top right corner of the application header.

Work Order	Description	Is Task?	Location	Asset	Scheduled Start
1000	Relocate Guard Rails Around Compressor	<input type="checkbox"/>	BR300	11300	3/30/16 3:00 PM
1001	12 Month Service on Shipping Dept #1 Conveyor	<input type="checkbox"/>	SHIPPING	12600	3/30/16 3:00 PM
1002	Rebuild Feedwater Pump	<input type="checkbox"/>	BR450	11450	APPR
1003	Check for Plumbing Problem	<input type="checkbox"/>	BOILER	APPR	3/30/16 3:00 PM
1004	Generator Overhaul	<input type="checkbox"/>	BR230	11230	INPRG
1005	Electric Cart Tune-Up	<input type="checkbox"/>	SHIPPING	12300	APPR
1006	Feedwater Pump Service	<input type="checkbox"/>	BR450	11450	APPR 3/30/16 3:00 PM
1007	Packaging Mach. Elevator & Drainpan Inspection	<input type="checkbox"/>	BPM3100	13141	APPR 3/30/16 3:00 PM
1008	Repair Damaged Conduit Feeding Generator	<input type="checkbox"/>	BR230	11230	WAPPR 3/30/16 3:00 PM
1009	12 Month Service on Shipping Dept #2 Conveyor	<input type="checkbox"/>	SHIPPING	12700	INPRG
1013	Inspect and Repair Pump as Required	<input type="checkbox"/>	REPAIR	11470	APPR

# Updated Look and Feel

## - Maximo Application Suite Manage

### Continues to support previous features

- Application Designer
- Conditional UI

### New Capabilities:

Table Window details embedded

### Removed properties file options

- Skin
- Dynamicfontsize
- Vericallabels
- showOnToolbar

Work Order Tracking

Work Order: 1000, Relocate Guard Rails Around Compressor, Site: BEDFORD

Location: BR300, Boiler Room Reciprocating Compressor, Class: WORKORDER

Asset: 11300, Reciprocating Compressor- Air Cooled/100 CFM, Work Type: CM

**Asset Details**

Asset	Status
11300	NOT READY
Reciprocating Compressor- Air	Primary User/Custodian
Ingersoll-Rand Company	Manufacturer
--	Type
--	Item
--	Classification
43960	Serial Number
Boiler Room Reciprocating Compressor	Location
4286	Asset Tag

Attachments

Status: WAPPR

Status Date: 2/6/99 2:25 PM

Inherit Status Changes?

Accepts Charges?

Under Flow Control?

Suspend Flow Control?

Flow Action

Toggles instead of checkboxes

# Reporting Updates

## BIRT

- Updated BIRT reporting to the latest 4.8 release in MAS 8.8 and 7.6.1.3

## Cognos

- Adding Cognos to the Maximo Application Suite (Available with MAS 8.10)



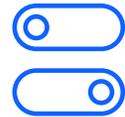
Provide analytic information to meet strategic and operational needs of our customers



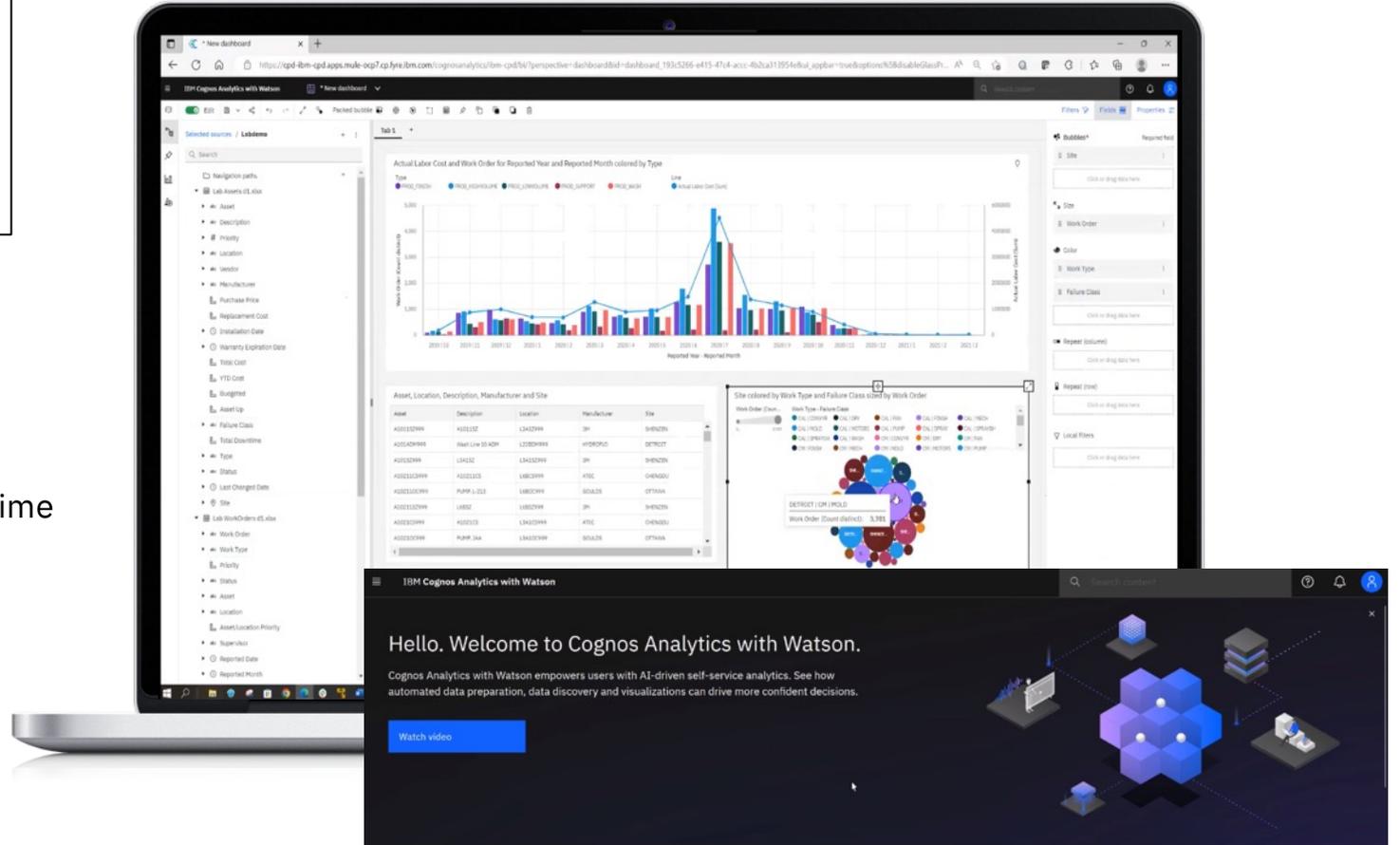
Display information quickly and in real-time



Deliver critical metric to drill down into actionable items



Make content customizable



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### Quick launch



#### Upload data

Upload or drag and drop spreadsheets, csv files, and other data sources.



#### Prepare data

Use data modules to clean and connect data from multiple resources.



#### Exploration

Quickly find unbiased answers by identifying trends in your data with data exploration.



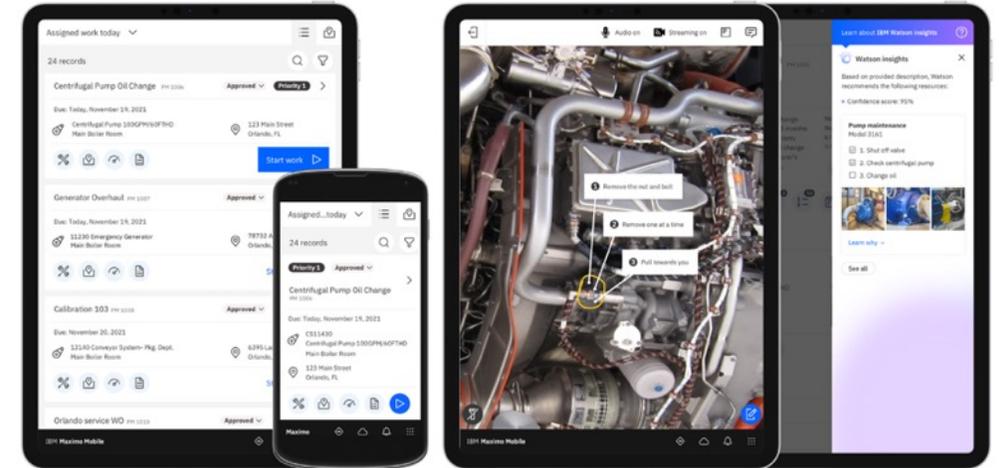
#### Present data

Create sophisticated, multi-page, multi-query dashboards, reports, or stories.

# Modernized experiences to support the new workforce

## New Maximo Application Framework

- ✓ Uses [REST APIs](#) to ensure business rules with direct connectivity to the enterprise system
- ✓ Applications run in a [browser or on a mobile](#) device
- ✓ Same tool to [configure](#) an App to run on mobile and desktop, can use xml presentations
- ✓ Same development environment to [create/build Apps](#) for mobile and desktop
- ✓ AI Infused Applications
- ✓ Award Winning Design



### Goals include Improved:

- Increased Productivity
- Actionable Dashboards
- Data accuracy
- First Time Fix Rates

# Role Based Applications

## Next Generation User Experience

Available



Actionable Dashboards to improve efficiencies



Intelligent workflows



Configurability

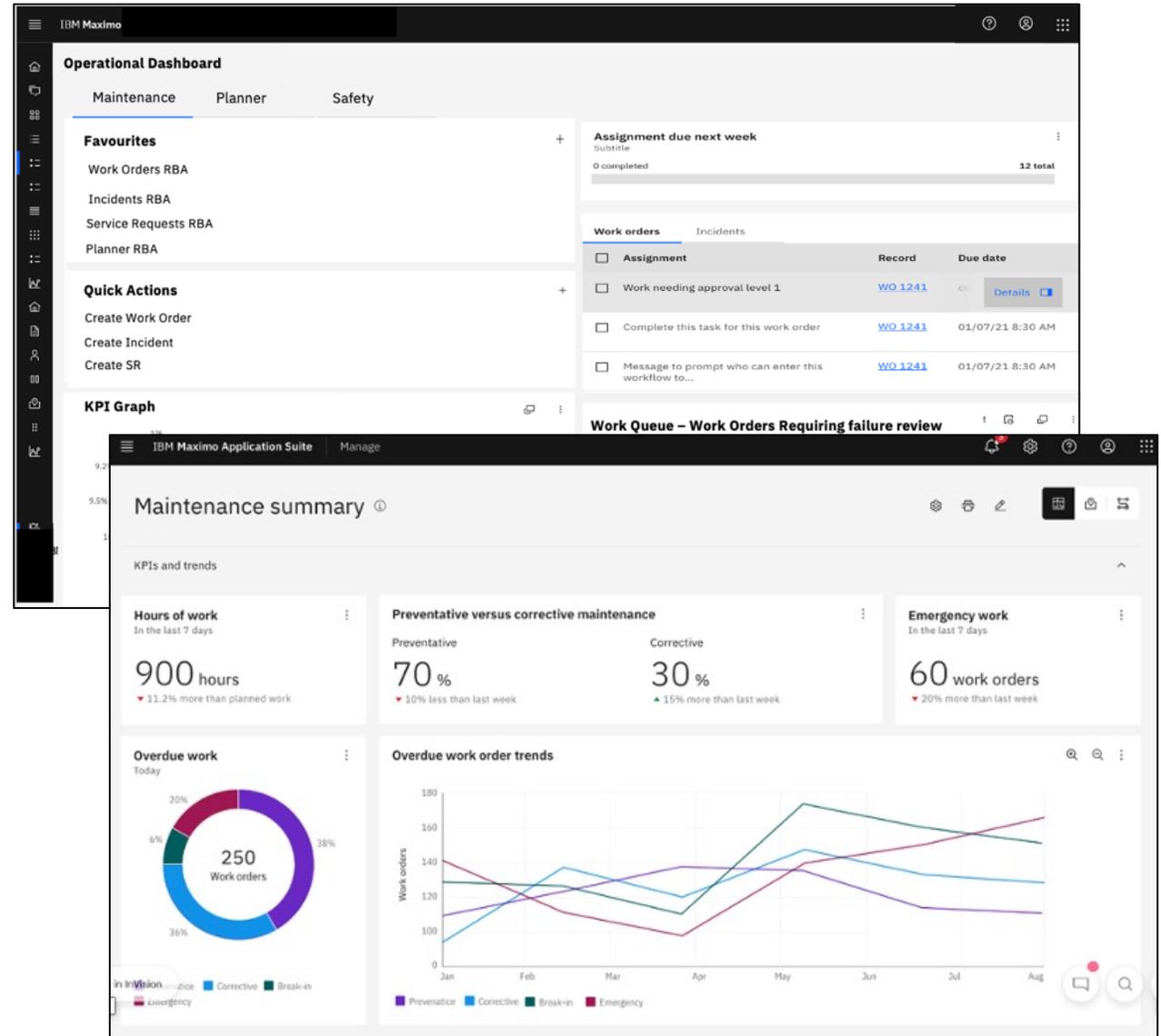


Built on Maximo Application Framework



Connected

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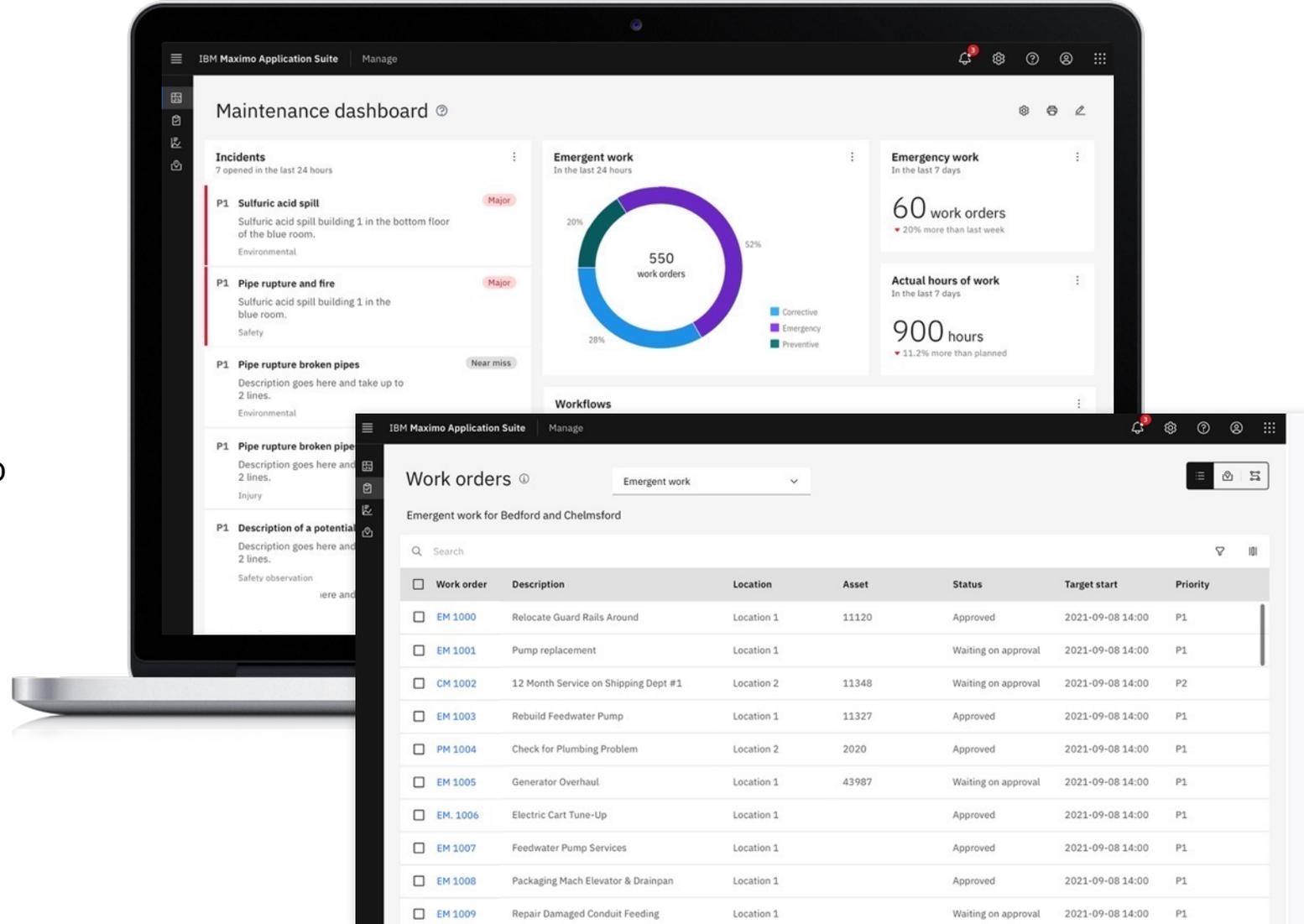
# Operational Dashboard

- *Role Based Application*

Available

Overview dashboard and basic navigation

- [Entry point for the Manager](#) will be an overview dashboard. The Manager will be able to navigate to further detailed screens for each main component of the overview dashboard.
- In general, the Manager will be presented with [summary information](#) with the ability to navigate to Classic for details when necessary.
- [Existing configuration applications will be utilized](#). These applications will normally be configured for the Manager by a Maximo administrator.



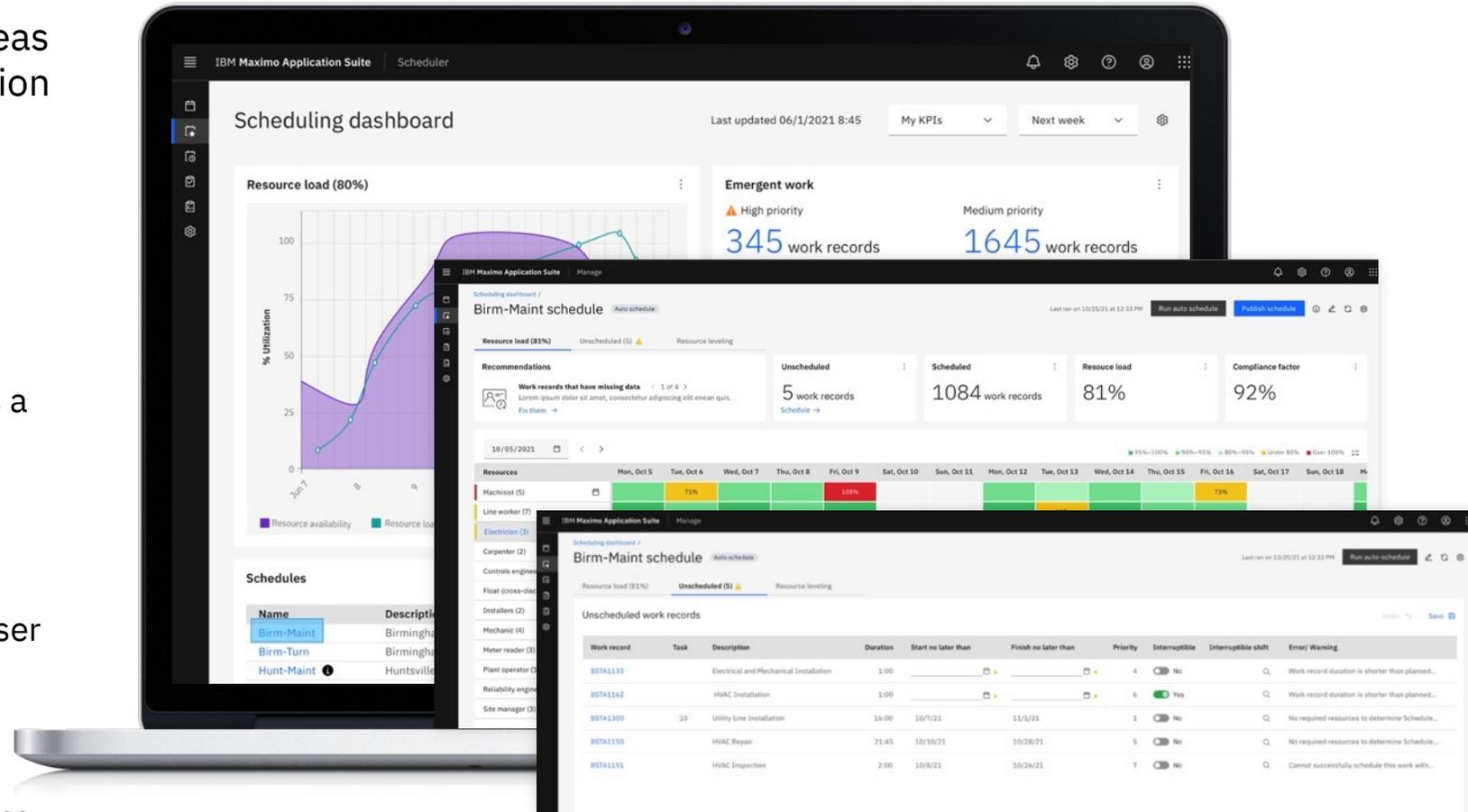
# Scheduling Dashboard

## Role Based Application

Available

A holistic view of schedules, highlighting areas requiring scheduler's attention with navigation to detailed schedule.

- Optimization initiated by the scheduler or at specific times using configurable parameters. The results of the [optimized schedules are shown by resource load](#) and resource levelling.
- Resource load and availability is presented as a heat map, [clearly indicating areas of concern](#)
- Resource levelling provides the user with an [interactive graphical view](#)
- Unscheduled work records are listed with the errors or warnings in a table that allows the user to fix inline
- Ability to bring work into the [schedule from a backlog](#)
- [Compliance reporting](#) with configurable metrics
- Leverages existing objects and methods of core applications. Ability to navigate to classic applications for details and additional modifications when necessary



# Dispatching Dashboard

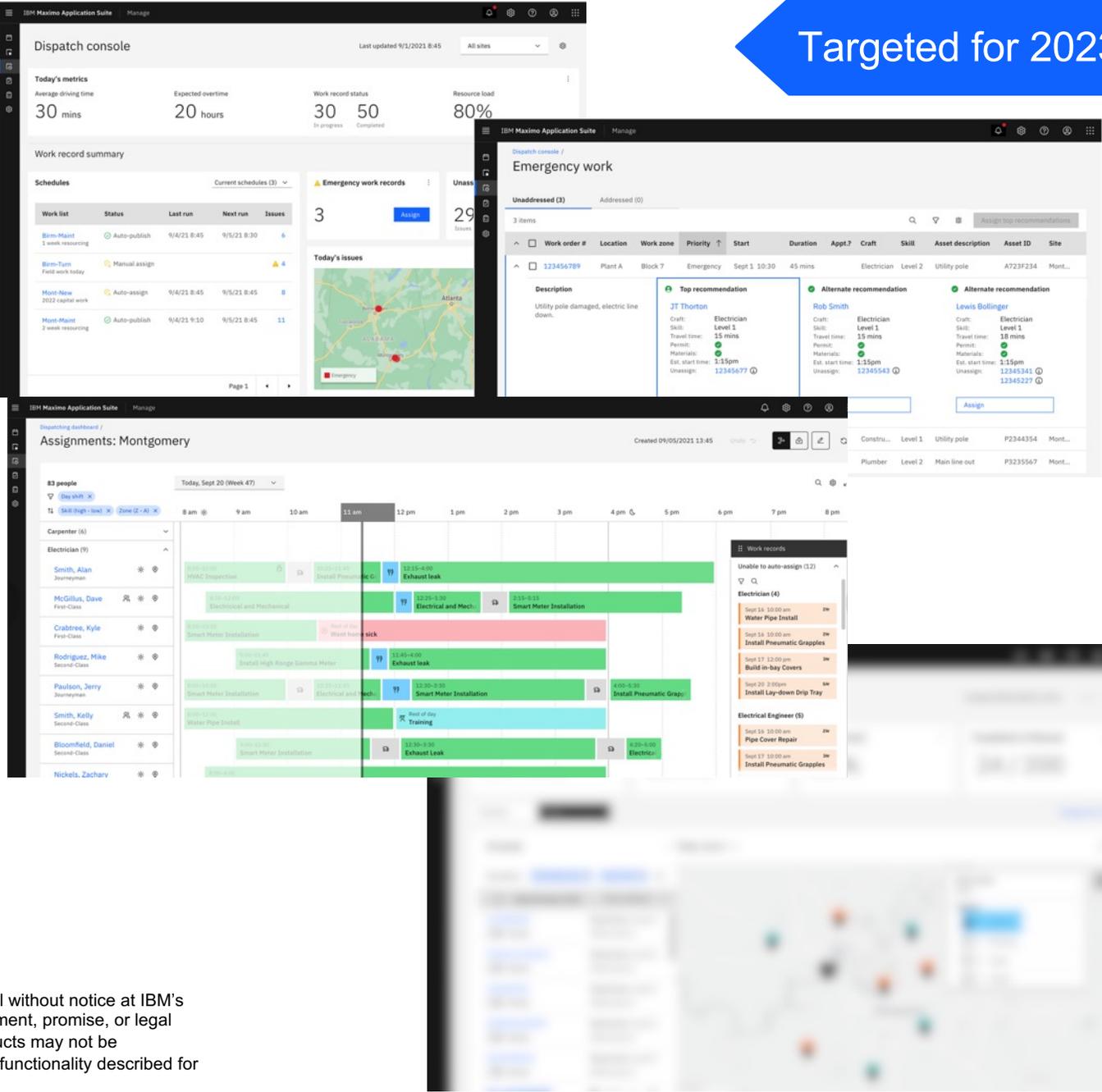
## Role Based Application

Targeted for 2023

### Overview

The dashboard is a holistic view indicating areas requiring attention with navigation to detailed schedule

- Rule based optimization can be initiated by the user or scheduled as specific times using configurable parameters. The results of the optimized assignments are presented as KPIs in graphical timeline or map
- Emergency work top recommendations presented to the user to make informed decisions to assign to the right person considering various factors such as skill, travel time and current assignments
- Timeline interactive view allows the dispatcher to monitor work status as the day progresses and indicates areas requiring attention
- Map interactive view allows the dispatcher to view technicians and crews daily routes and locations
- Ability to assign work from a backlog when extra time is available



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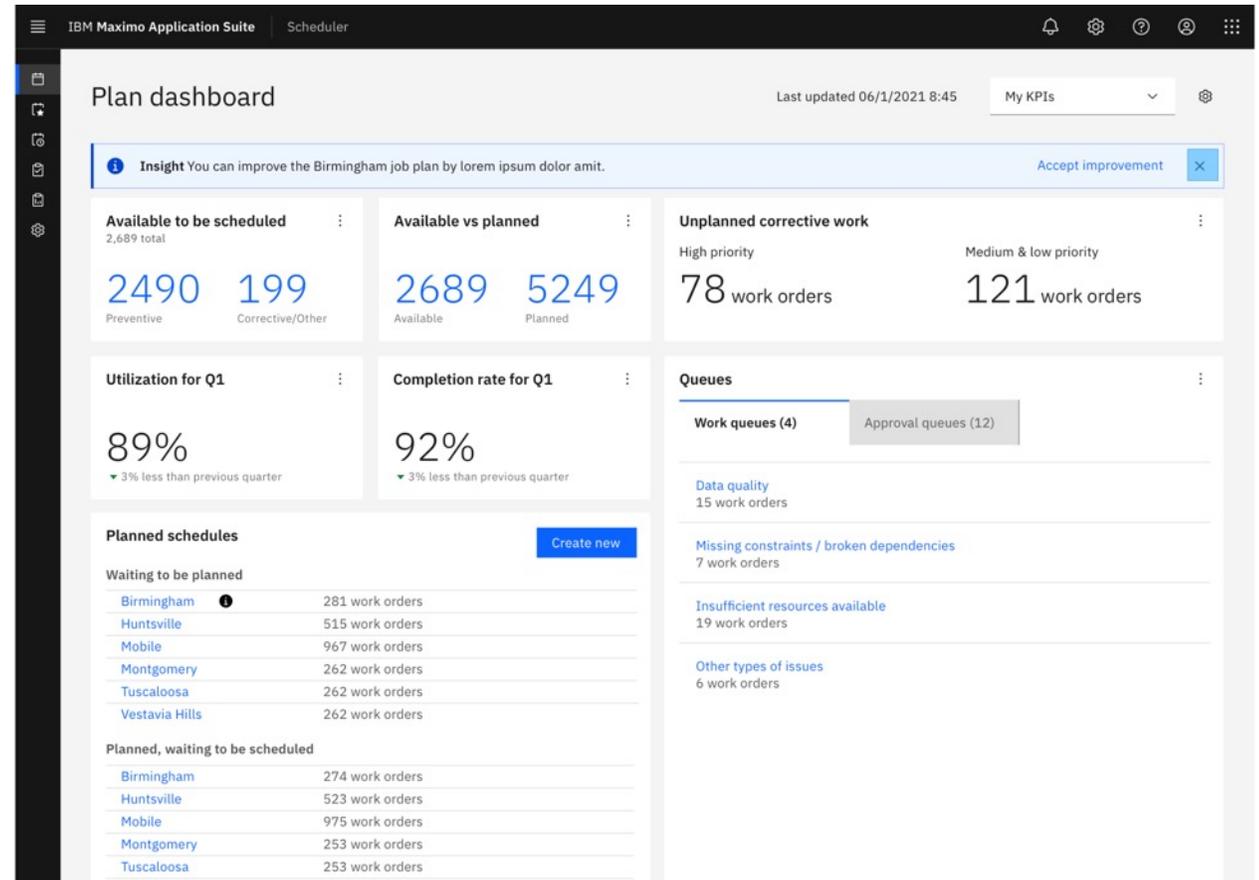
# Planning Dashboard

## Role Based Application

Targeted for 2024

## Overview

- Dashboard is a holistic view of KPIs requiring attention of the planner
  - Job Plans
    - Routes
  - PM status
    - Forecasts
    - Work order generation
  - Schedules
    - Outage/Turnaround
- Outage planning using pert charts
- Optimized PM forecasts
  - Asset health condition to influence forecast



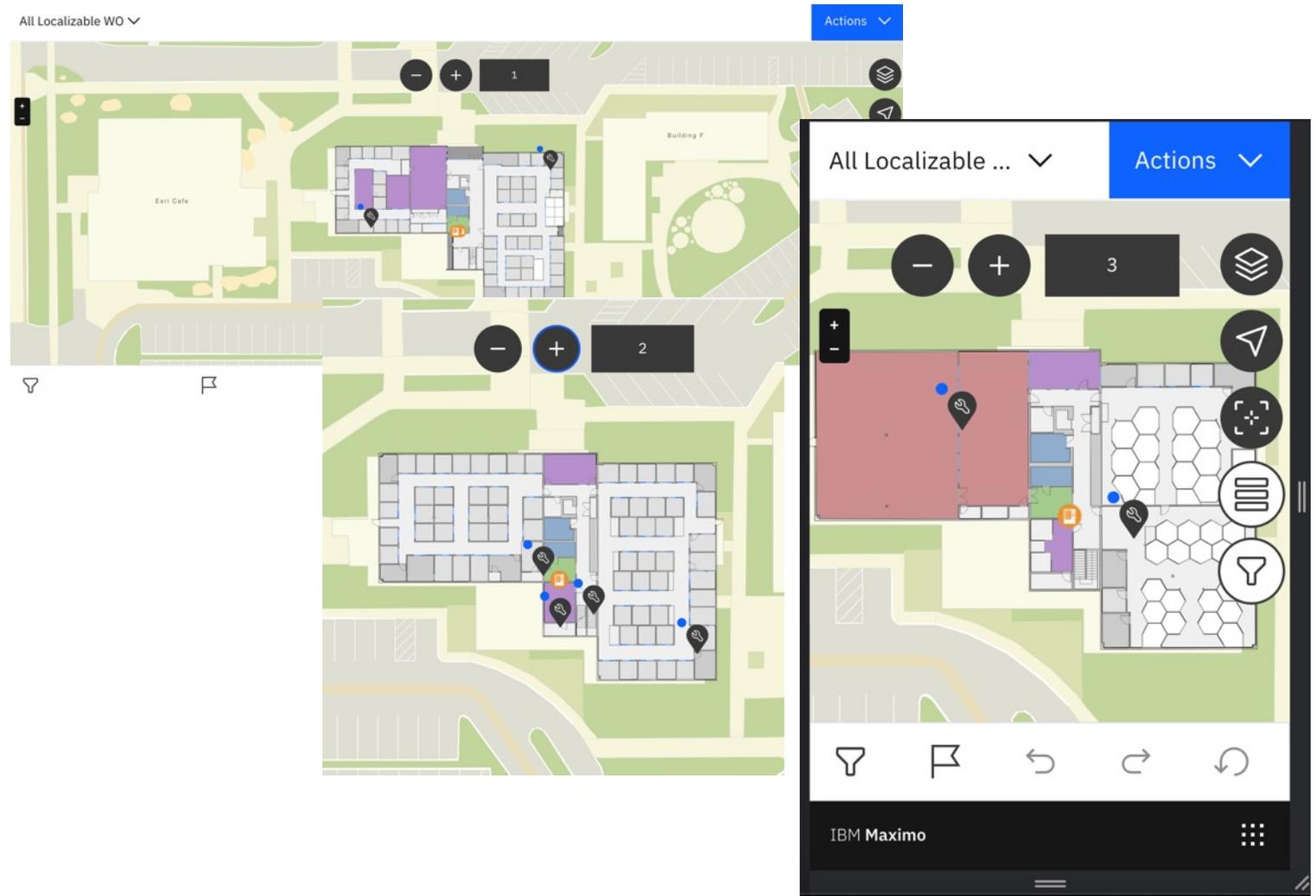
IBM's statements regarding its plans, directions, and intent are subject to change or withdrawal without notice at IBM's sole discretion. The information mentioned regarding potential future products is not a commitment, promise, or legal obligation to deliver any material, code or functionality. Information about potential future products may not be incorporated into any contract. The development, release, and timing of any future features or functionality described for our products remains at our sole discretion.

# Spatial – ESRI Indoor mapping

Available

## Maximo Spatial

- Support for ESRI Indoor GIS
- Quickly find and validate work locations
- Area Isolation scenarios
- Indoor Positioning for proximity and routes
- Access through MAP tab in existing Mobile and Desktop applications – supports online and offline access



# MAS Maximo Mobile

- Next Generation User Experience
- Also works with Maximo 7.6.1.2+



1 application,  
1 role-based interface



Connected  
and disconnected



Intelligent workflows =  
blue button



Trustworthiness: data quality  
is higher, and real-time updates



Intelligent forms =  
configurability

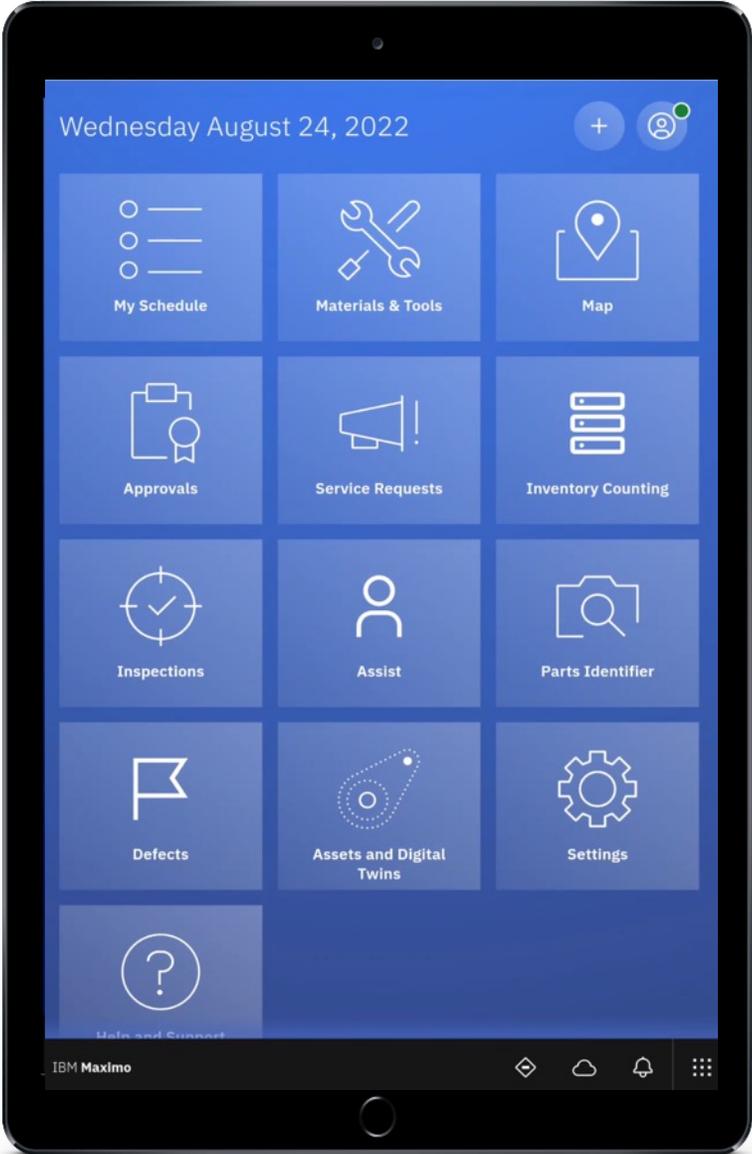
Downloadable from:



Apple App  
Store



Google Play  
Store



# Continuing to deliver on mobile applications



## • Technician

- Create material Requests with multiple materials
- Confirm the work is completed thru Physical Signature
- View history of location work orders
- Report tool actuals
- Scan RFIDs on the work order

## • Inspection

- Create forms based on legacy paper inspection requirements.
- Ensure accuracy with visual indicators – icons and colors to match responses
- Watson capabilities provide conversation interaction for hands-free capabilities
- 

## • Work Approvals

- Review work
- Approve work.

## • Service Request

- Ability to create service request
- Choose from predefined problem types
- Attach images
- Quickly identify status on open active requests

# Inspections

- Create forms based on legacy paper inspection requirements.
- Ensure accuracy with visual indicators – icons and colors to match responses
- Watson capabilities provide conversation interaction for hands-free capabilities

The image displays three overlapping screenshots of the IBM Maximo Mobile application interface, illustrating the inspection workflow. The top-left screenshot shows a list of inspection records under the heading 'In Progress', with 15 records and a 'Check for updates' button. The middle screenshot shows a detailed view of a 'Pump Inspection' for asset 'PM T1089', with a 'Complete' button. The bottom-right screenshot shows a 'Previous results' screen for the same inspection, displaying a list of responses to the question 'Any signs of leak?'. The interface includes various visual indicators such as checkmarks, thumbs up/down icons, and colored bars to represent different inspection sections and their completion status.

08:57 08:57 08:57

In Progress 15 records Check for updates

Pump Inspection

Due: Today, October 22, 2021

11430 00 BR430 Condensate Return Pump-Centrifugal/100GPM/60FTHD

Monthly Fire System Inspection 2

1001 Fire Extinguisher

Portable Ladder Inspection

11430 00

IBM Maximo Mobile

PM T1089 Complete

Pump Inspection

11430 00

External Section

Leaks

Any signs of leak?

Yes No

Please describe

fdgdfgdf

Electrical connections

Are the connections secure?

Yes No

Corrosion

Is there visible corrosion or rust?

Yes No

2. Pump Engine

IBM Maximo Mobile

Previous results Complete

Any signs of leak? 1 required of 1

3 records

Yes October 21, 2021

No October 21, 2021

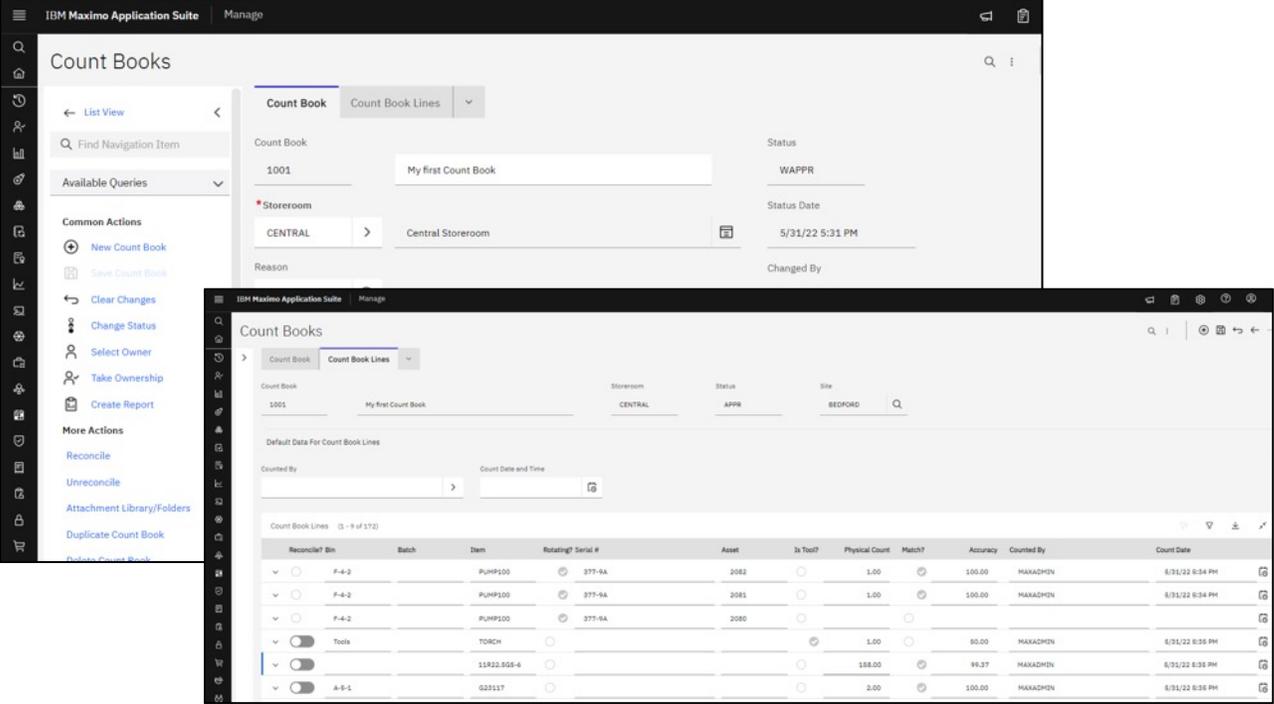
No October 22, 2021

IBM Maximo Mobile



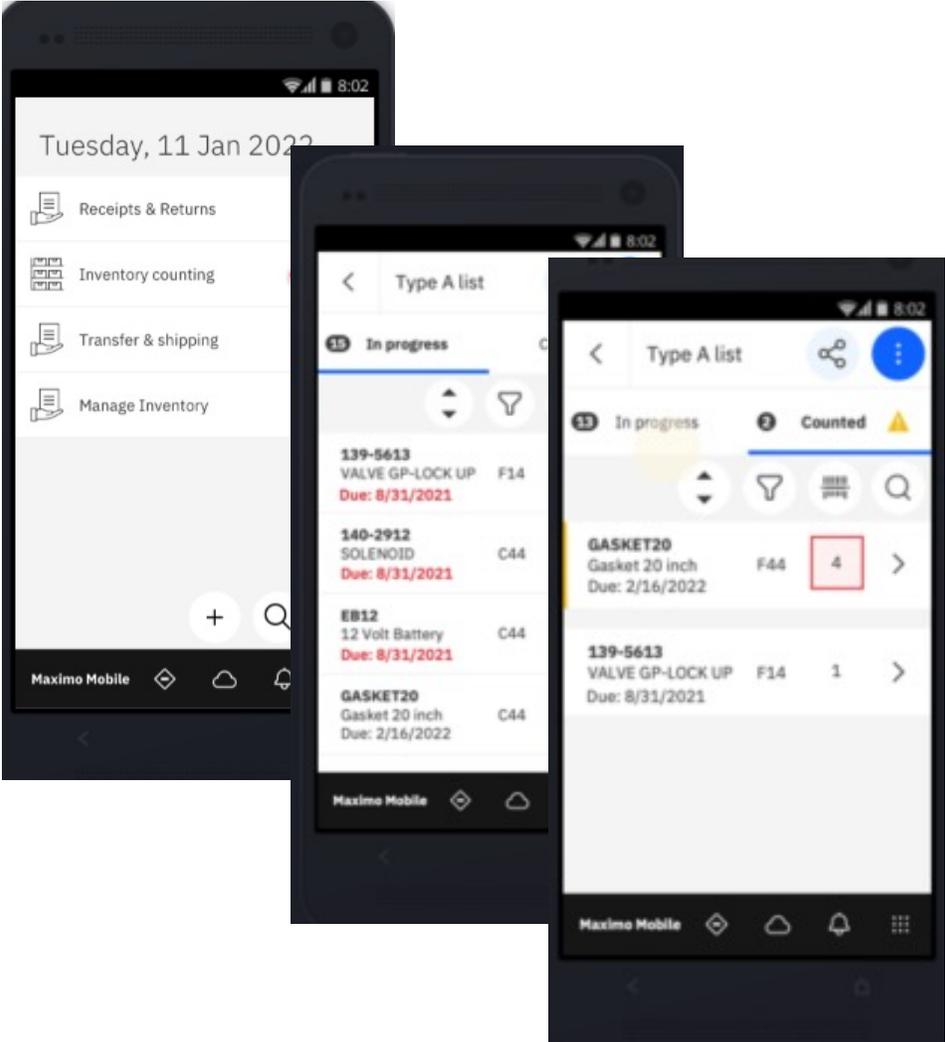
# Storeroom Clerk

## Inventory Count Books – Inventory Counting



A *count book* is a list of items in a storeroom for which you want to periodically record inventory physical counts.

You can check the accuracy of the system-calculated balances relative to the physical counts and reconcile the differences.



Accept materials being delivered (or returned) and inspect quantity and quality in one place efficiently

# Adaptive UI and Configuration of the Maximo Application Framework

Applications that use the new Maximo Application Framework can be configured to add new fields, update labels, or even duplicate an application to make it your own.

## Drive Efficiency at Scale



Accelerate adoption



Protect your investment



Quicker time to value

The screenshot displays the IBM Maximo Configuration interface for the 'SEP Work Technician' application. The top navigation bar includes 'IBM Maximo Configuration', 'Masthead actions TBD', and user profile icons. The main content area shows the configuration for the 'SEP Work Technician' application, with a 'Tablet' view selected. The central card layout includes a title 'Generator Overhaul PM 1007', a status 'Approved', and a priority 'Priority 1'. Below the title, it indicates 'Due tomorrow. Due March 18, 2020.' and provides location details: '11230 Emergency Generator Main Boiler Room' and '78732 Avenue A Orlando, FL'. The card also features a 'Start work' button and a set of icons for actions like 'Cut', 'Map', 'Document', and 'Z'. The left sidebar lists 'Work center pages' such as 'Work order list', 'Materials & tools', 'Work order details', 'Map', 'Attachments', 'Meter readings', 'Work log', 'Tasks', and 'Report work'. The right sidebar shows the 'Edit card' configuration, including fields for 'Name' (Work Order), 'Description' (This is a card.), and 'Touchpoints' (Attachments, Map view, Materials & tools, Meter readings, Work log notes) and 'Action' (Change status, Start/stop work, Z action).

# Maximo application framework configuration

## Configuration Capabilities:

- XML Editing Page
- Component Property Editor
- Duplicate Application
- Customization enablement
- Preview changes
- Upgrade Tooling (XML Diff)

The screenshot displays the IBM Maximo Application Configuration interface. The top section shows the 'Application list' with 8 results. Below this, the 'TECHMOBILE' application is selected, and the 'app.xml' file is being edited. The XML editor shows the following code:

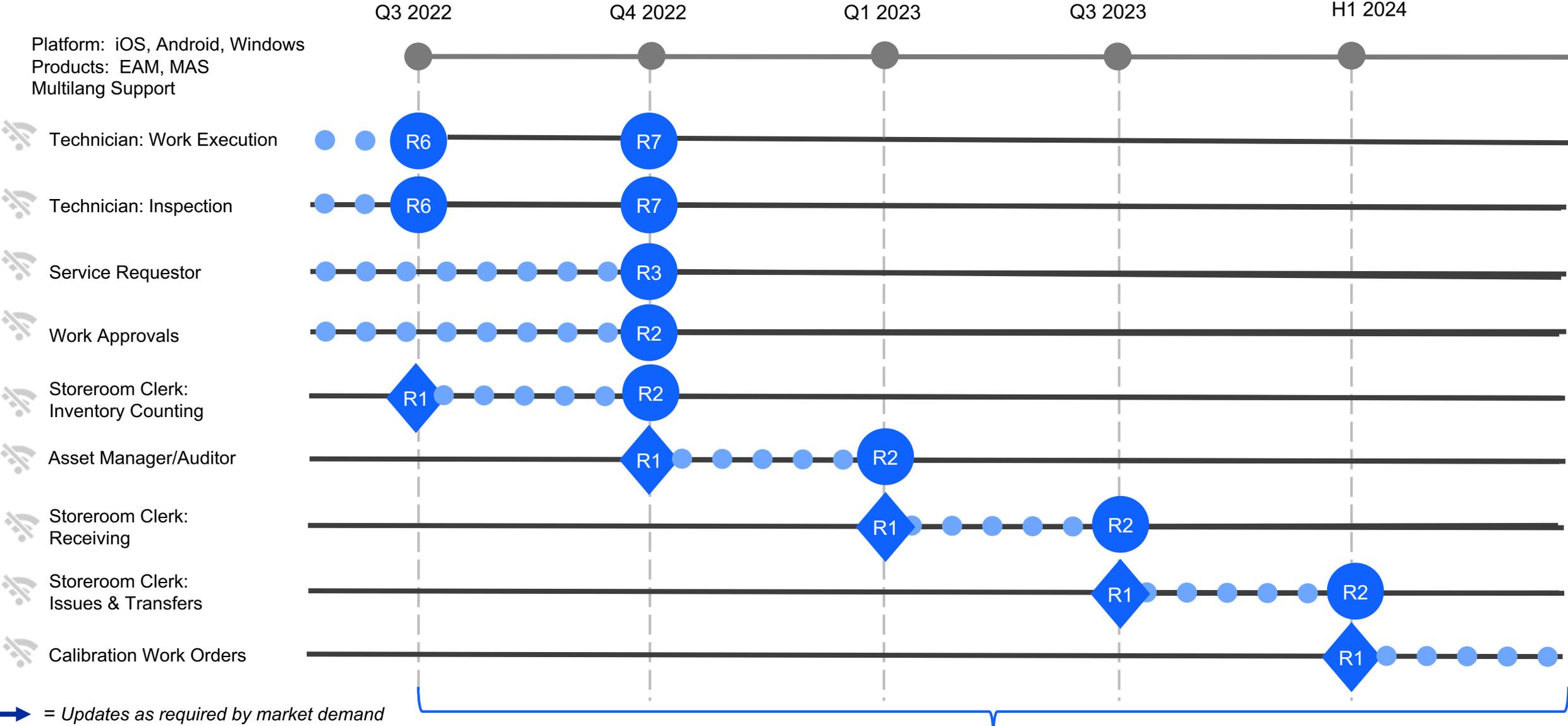
```
961 </data-list>
962 <border-layout fill-parent="true" hidden="{page.state.
hideToolMaterial}" id="vn3bv">
963 <top horizontal-align="center" id="pe65z">
964 <box direction="row" vertical-align="center"
horizontal-align="center" padding-top="15" id="p77kb">
965 <label label="No planned materials or tools."
padding="default" theme="20-regular" id="eqear"/>
966 </box>
967
968
969
970 </p>
971 </contro
972
973
974 id="md
975 id="ya
976 id="zk
977 id="z2
978 id="na
```

The 'Properties editor' shows the following properties:

Property	Value
*id	workOrderDetails
comp-group-valid-chg	Enter the value
controller	WorkOrderDetailsCo

The bottom section shows a mobile app preview for 'Get materials & tools' with 109 records. The preview includes a 'Check for updates' button and a 'Start work' button. The application is currently in an 'Approved' state.

# Roadmap to Expand Maximo Mobile



## Mobile Platform and Enhanced Configuration Tool

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# Maximo Assist

Empower technicians to work autonomously by enabling them to obtain AI guidance whenever they need it



Engineering process:  
Root Cause Failure Analysis (RFFA)  
Failure Modes Effects Analysis (FMEA)



Historical work orders  
(EAM data)



Manufacturer and owner  
manuals, engineering manuals



Custom training repository



Journals, magazines

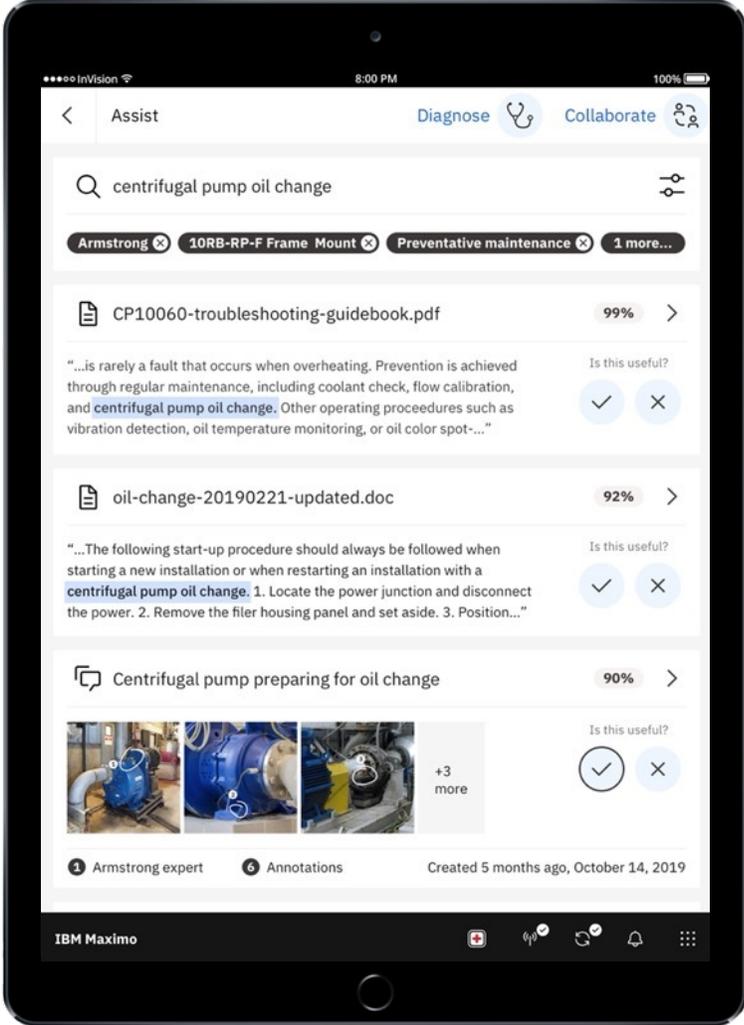


Customer  
service/helpdesk data



Ask expert technician

**Benefits:** Reduce mean time to repair, boost first time fix rates, improve technician productivity



# Assist Remote Guidance

for additional assistance, whenever you need it,  
wherever you need it



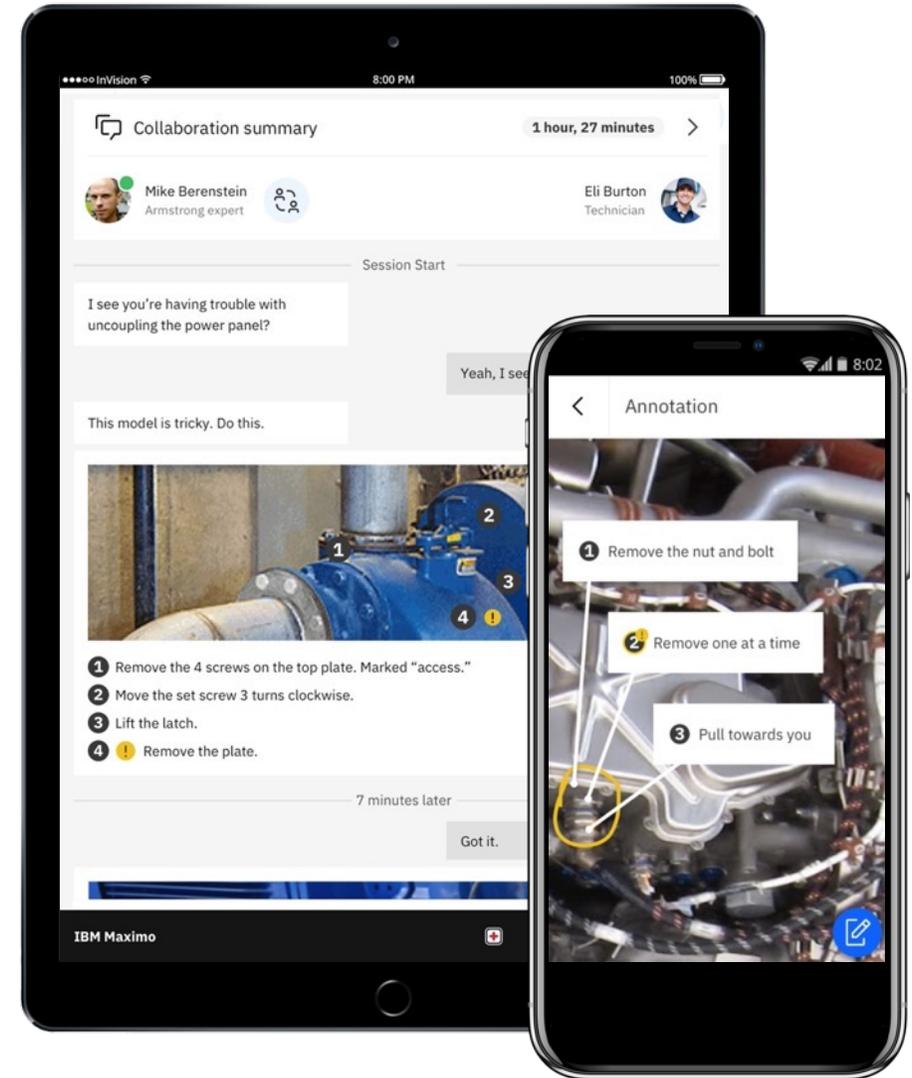
Remote Guidance session history [attached to the Maximo work order](#) for future reference and added to AI knowledge base



[Capture your expert knowledge](#) and make it searchable next time a similar incident occurs



Enhance experience for new technicians and help [every technician perform like your best technician](#)



# Manage - Continued Technical Improvements

## AutoScripting

- Configurability and extensibility.
- Multiple customer points including lookups, objects
- Test button for validation
- Improved Documentation and a playbook

## Integration Improvements

- Import/Export orchestration across multiple data types
- JMS Enablement
- User Interface with improved searching and sorting
- Direct file loading from S3 simple storage service.

## Operator Maturity

- Improved deployment
- Backup & Restore/HADR

## Serviceability

- MMI Enhancements
- Alerts and auto-closing of MBO sets to prevent memory and connection leaks
- Logging Improvements

## Tools API – access to

- Integrity Checker
- DB Config
- Secure execution of CLI through Rest API's

## Migration Manager API

# IBM Appconnect supporting integration scenarios

Enables data interchange use case(s) between MAS and other solutions

- Between IBM Solutions
  - MAS to TRIRIGA
  - TRIRIGA to Envizi
  - MAS to Envizi

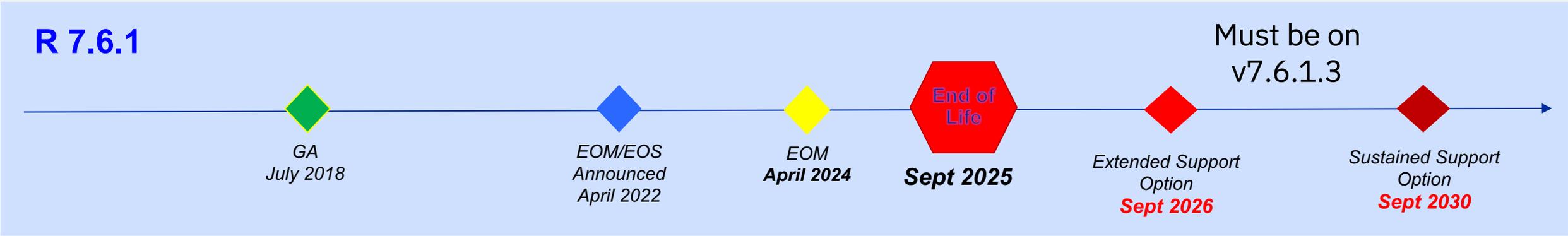
- Between IBM and 3<sup>rd</sup> Party Solutions
  - MAS to Workday

- **Transformation** - Flows capture business logic
- **Mapping** - Map resource data from a source to a target (inbound and outbound)
- Triggered via schedule or Web invoked API



# Maximo EAM Lifecycle Updates

	DESCRIPTION	DATE
Announce End of Market (EOM & EOS)	Announcement Letter published <a href="#">IBM Announcement Letter #922-024</a>	April 12, 2022
End of Marketing (EOM)	Parts are no longer available for purchase	April 19, 2024
End of Support (EOS)	Update Support Plans and Lifecycle page	Sept 30, 2025



**IBM Extended Support:** Enables clients continued access to IBM Support for "how to" questions, usage issues, known defects published in IBM Fix Central, and new critical sev1 defects (no security fixes) after IBM standard support ends for 7.6.1.x.

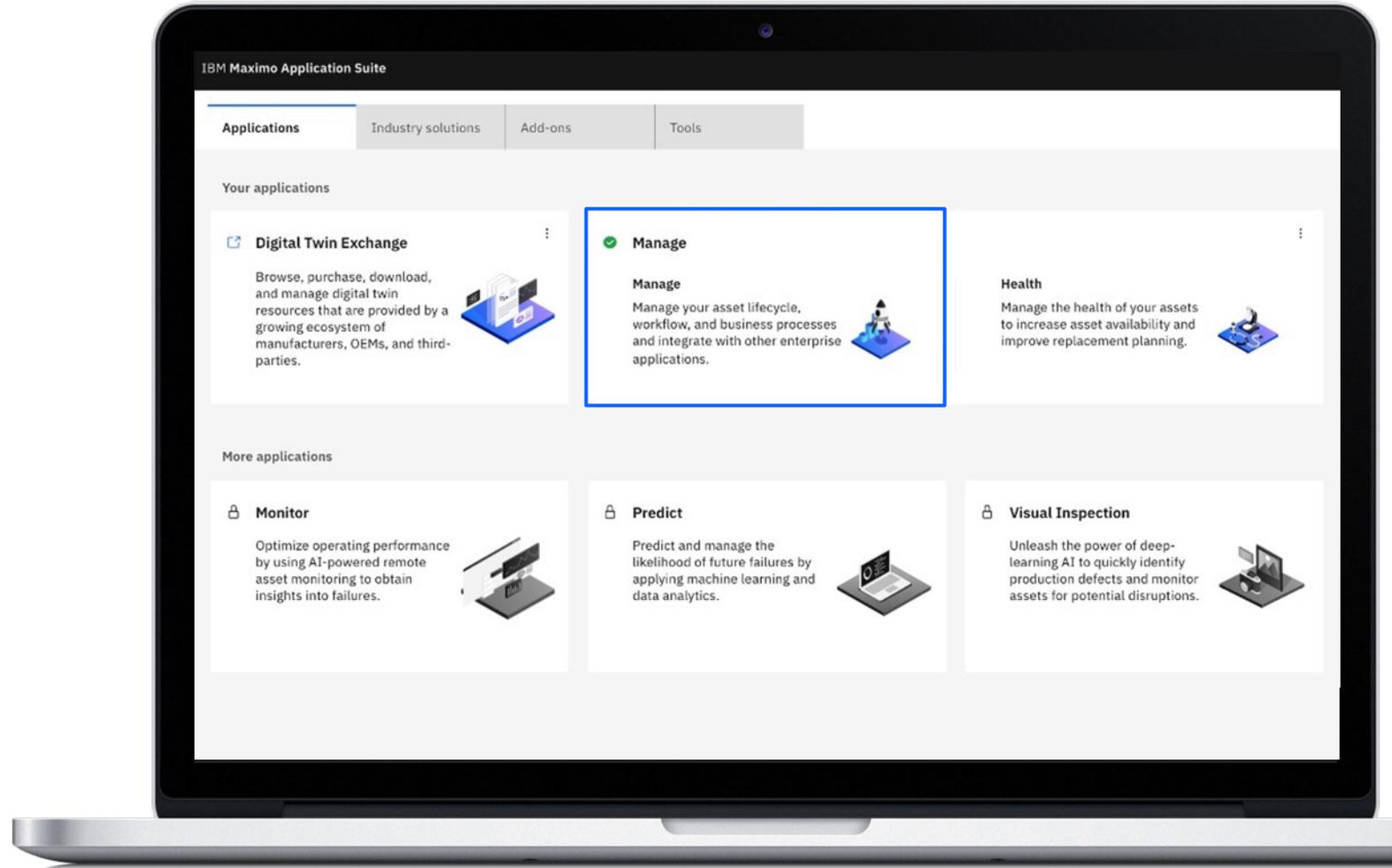
**IBM Sustained Support:** Enables clients to continue to get support for "how to" questions, usage issues, and known defects published in IBM Fix Central after IBM standard/extended support ends for 7.6.1.x. IBM Sustained Support does not include support for new defects or new security fixes.

# Upgrading to Manage in the Suite

**Maximo Manage** is part of the Maximo Suite: Best of class capabilities to provide a complete view of your assets

## Manage in the Suite

- New installation process at the MAS level
- Deployed on Red Hat OpenShift Container Platform (OCP)
- Authentication and User Management moved to the MAS level
- Modernized user experience to align with rest of the Suite
- Improved serviceability for monitor and logging options



# MAS Digital Trials

## Maximo Application Suite

(MAS SaaS with Health & Manage capability only)

## Environmental Intelligence Suite (EIS)

## Envizi ESG Suite



### Customer/Partner/Prospect signup links

Prospects will find our new trials on the main product pages for each of the products. You can also share these links that take them directly to the sign-up page. Please direct all customers, partners and prospects to sign up for the trials using the links below in order to properly track their participation.

Maximo: <https://www.ibm.com/account/reg/us-en/signup?formid=urx-51868>

EIS: <https://www.ibm.com/account/reg/us-en/signup?formid=urx-51911>

Envizi: <https://www.ibm.com/account/reg/us-en/signup?formid=urx-51857>

## Maximo Digital Learning Subscription

Whether you are an enterprise seeking to get your team up-to-speed or a single individual seeking to build skills for your career, a 12-month subscription to the Maximo Digital Learning catalog of courses can save you time and money.

- **Maximize your investment:** Maximize your investment in IBM Maximo solutions. Bring your newly-acquired solutions to life. Pay one price for a 12-month learning subscription. Realize built-in savings compared to individual course purchases.
- **Build expertise, stay current:** Develop skills through flexible learning plans based on your goals, schedule, and budget. Get easy, on demand access to eLearning with hands-on labs included for 12 months. Close the skills gap. Meet your talent and skills transformation goals.
- **Personalize the learning experience:** Prepare for major IT initiatives or learn when needed during a project deployment. Choose courses that map to your learning journey and desired role. Prepare to be a certified professional.
- **Adopt a flexible and modern approach:** Move at your pace. Choose self-paced courses with hands-on labs and web-based courses during your subscription. Choose learning when you are available. A modern approach to learning with IBM.
- **Cost savings:** Pay one price for 12-month subscription. Save up to 45% over purchasing the courses individually.

To learn more about the IBM learning subscriptions and how to purchase, please visit the Maximo subscription pages on IBM.com:

[IBM Maximo Individual Learning Subscription](#)

[IBM Maximo Enterprise Learning Subscription](#)

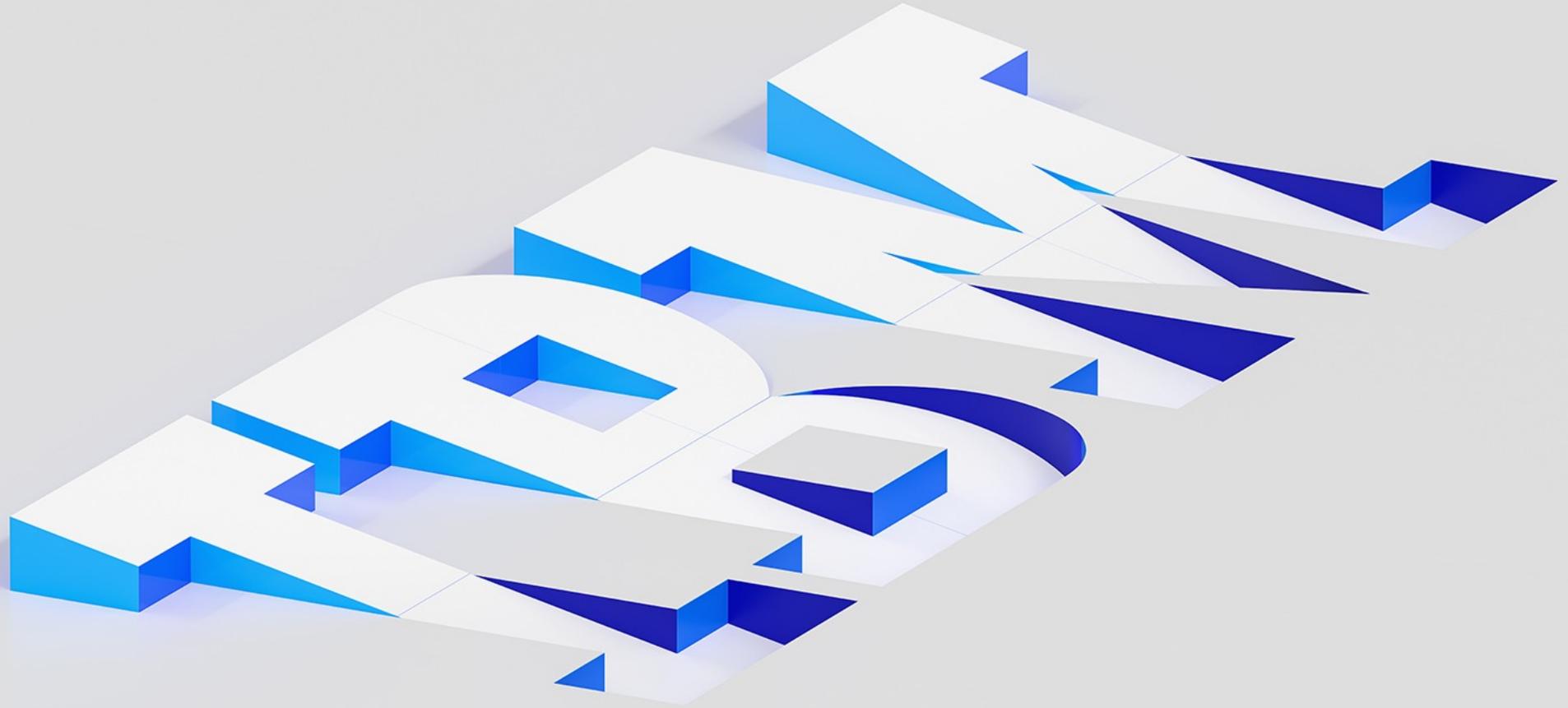
### Individual subscription

- Individual student access to digital learning course material for 12 months for one fixed price.
- Student can take up to 9 digital courses from the Maximo DLS catalog.
- List price \$2400 USD

### Enterprise subscription

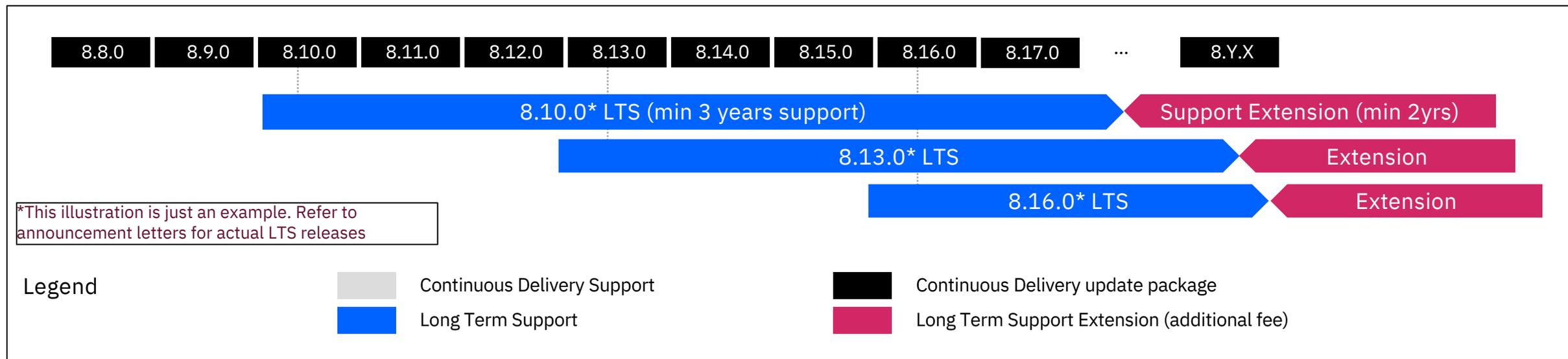
- 30 digital enrollments for up to 30 individual students for 12 months for one fixed price.
- Company Administrator can assign and track up to 30 courses to enterprise employees.
- List price \$12,504 USD

Questions?



# IBM Maximo Application Suite continuous delivery support

Starting with MAS v8.7



- MAS v8.7 signifies a change of lifecycle support policy from 'IBM Standard' to 'IBM Continuous Delivery'
- CD update packages (v8.x) incrementally deliver new capability.
- Regular maintenance releases (v8.x.y) deliver defect fixes for the most recent two updates.

- A CD update package may be declared a Long-Term Support (LTS) release, which is supported for a minimum of 3 years.
  - LTS releases just receive security and defect fixes with no incremental functional enhancements.
- If a CD update package is no longer eligible for defect fixes, update to a package that is eligible, and if the defect can be recreated, a fix will be provided.

MAS Support Lifecycle Policy statement: <https://www.ibm.com/support/pages/ibm-maximo-application-suite-software-support-lifecycle-policy>  
Red Hat OCP Support Lifecycle statement: <https://access.redhat.com/support/policy/updates/openshift>  
IBM Support Policy definitions: <https://www.ibm.com/support/pages/node/718165>

# What's New in MAS 8.10 for Manage

## Manage

- FIPS 140-2 Support (completed 8.10.1)
- Single-node OpenShift (Manage IS/Add-ons – excluding Workday connector)
- Continued work on Continuous Delivery items (CICD) and Operator maturity level items
- Integration to Cognos 11.2
- Bulk User load at MAS level

## Maximo Mobile

- New Inventory Receiving
- Ability to create and update asset details
- View work order specifications
- Maximo Mobile integration to Visual Inspections
- eSignature support for Work Order status changes
- Enhanced synchronization and error handling

## Scheduling Dashboard

- Optimize Report – Summary, Status and Alerts
- Optimize Schedule additional actions – Auto Refresh / Terminate
- Resource Leveling Page (1st edition)
- Navigation improvements (e.g., Add Additional Schedules from Dashboard)
- Enhance Calendar functionality in Scheduler to account for Breaks during scheduling
- Optimizer - explain ability of bottlenecks, improved resource leveling and locking of work orders

## Operational Dashboard

### Operational Dashboard

- New KPI card linked to KPI Manager including 4 out of the box KPIs
- New Favorites card with out of the box Favorite applications
- New Quick Actions card with out of the box Quick Actions
- Actions added to Workflow Assignments card

Work Orders - Advanced Filter added to Work Order List page & Walk Me video tutorial now included

Workflow Assignment -Advanced Filter added to Workflow Assignment List page

## Spatial

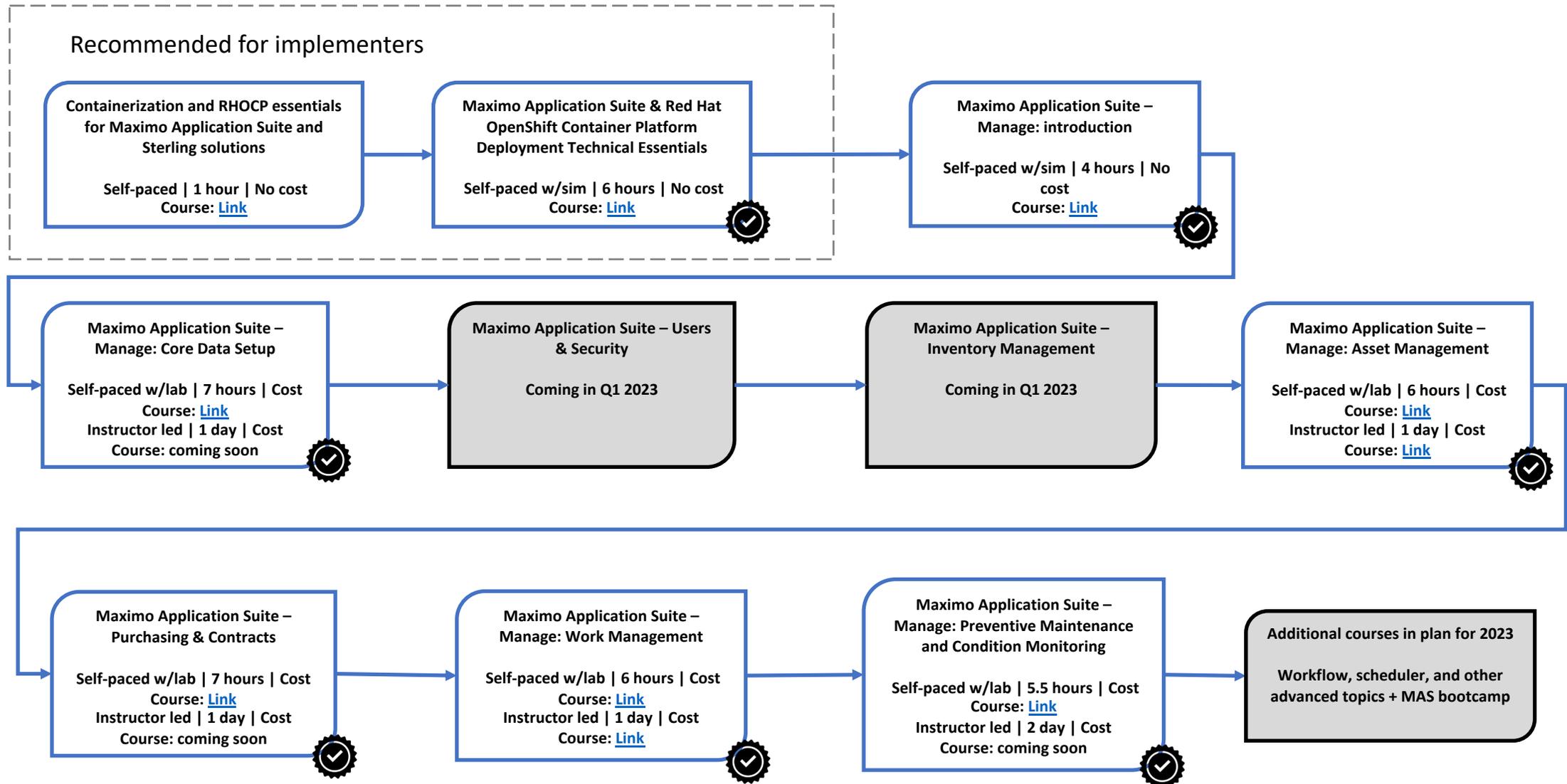
- Add and Edit tool - Phase 1 - Create Feature and Link
- Enhancement of Identify Tool / Preview Card
- Query Tool - Offline mode & Nearby - Around me + Maximo Objects
- Highlight Line Feature. / Enhancement - Data Panel
- Replace PlusSGeoJson for Geometry and auto-locate
- Indoors - Automatic Association Work Orders - Facility ID and Floor ID

## Civil Infrastructure

- New Operation Maps application
- Enhancement to Defect Tracking
  - Track manual changes of MVI anomaly for future model training
  - Usability updated to the Maximo Mobile Defects app
  - Open Defect Detection against multiple asset/locations
- US Tunnel Classification Accelerator Content

# IBM Maximo Application Suite – Manage 8.x

## Technical education recommended roadmap



## Technical certification

### Maximo v7.6

**IBM Maximo Asset Management V7.6  
Infrastructure and Implementation**  
(including prep material)

Self paced | Exam fee  
Credential: [Link](#)



**IBM Maximo Asset Management v7.6  
Functional Analyst**  
(including prep material)

Self paced | Exam fee  
Credential: [Link](#)



### Maximo Application Suite

**IBM Certified Deployment Professional –  
Maximo Manage v8.0**  
(including prep material)

Self paced | Exam fee  
Credential: [Link](#)



**IBM Certified Administrator – Maximo  
Manage v8.x**  
(including prep material)

Self paced | Exam fee  
Credential: [Link](#)



**IBM Maximo Visual Inspection v8.3  
Developer Specialty Exam**  
(including prep material)

Self paced | Exam fee  
Credential: [Link](#)



# AI Apps on OpenShift– Delivering Expanded Value

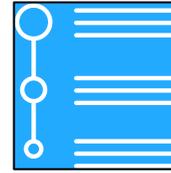
## Scale your operations with optimized resources

**38%** percent lower infrastructure

**35%** less IT staff time per application



Operations



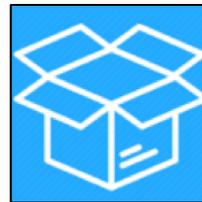
Management

## Manage Deployment Lifecycle through single pane of glass

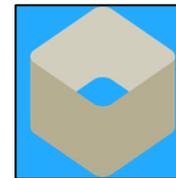
**60%** increase in IT administrator

## Packaged with latest and greatest technology stack

**80%** reduction in installation effort



Packaging



Containers

## Production ready containers built with highest industry standards

**80%** faster time to market

Secure & Integrated

Value - ROI

Development-Cost

(\*)Sources:

- *Emerging Technology Assessment: The Total Economic Impact of Using Both IBM and Red Hat Solutions Together*, Forrester
- *"The Business Value of Red Hat OpenShift"*, IDC
- *"Delivering Business Value through Transitioning from Managing VMs to Orchestrating Containers"*, Ovum

# Let's Talk About Adding a Layer of Control to Your Work Management Process



Gold  
Business Partner



# Environment, Health, and Safety

Protecting Our People, Customers, and the Environment

In support of V2X's vision and values, we are committed to Environment, Health, and Safety (EHS) excellence. The EHS Department is chartered with, and dedicated to, providing programs and practices that assist all employees in protecting each other, the communities we work in, and the customers we serve.

[Learn more](#)



**Management System**



**Initiatives**



**Metrics**



**Environmental Aspects and Impacts**



**COVID-19 Response**

- ensuring safe workflows and trouble-free operations

## TO SAFETY

### amental to who we are and

at every single workplace. Regardless of whether employed by JSM or by an  
mitted to ensuring that we not only implement the right rules and processes. It is

vement process aimed at:

and health risks at all workplaces

th the identified risks

ur industry

used by work

# Simplified Risk ID & Mitigation



- Step 1: Identify and analyze the risk
- Step 2: Review possible solutions
- Step 3: Implement the solution
- Step 4: Check and make any changes
- Step 5: Take action

- 
- Operations pose major hazard / risks
  - Assurance that systems and procedures continue to operate as intended
  - Regulatory / Compliance Risk

How can Maximo HSE help you to:

Step 1: Identify and analyze the risk

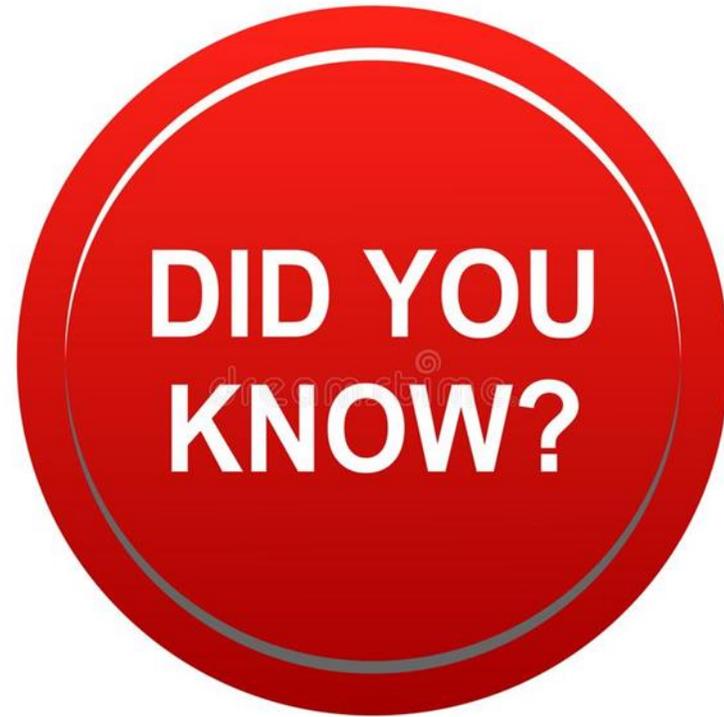
Step 2: Review possible solutions

Step 3: Implement the solution

Step 4: Check and make any changes

Step 5: Take action





**DID YOU  
KNOW?**

Control of Work Process

Maintenance Manager



Operations Manager





# Risk Assessment

Find Risk Asses

- List View
- Risk Assessment
- Hazard Review
- Review and Approval
- Checklist
- Environmental Risk
- Assessment Team
- Specifications
- Related Records
- Log

**\* Risk Assessment:**  
 1001

Prepared By:  
 WILSON >> Mike Wilson

Template?

Organization:  >> Site:  Attachments:

Status: DRAFT Status Date: 2/12/18 3:14 AM

Owner:  Owner Group:

**Details**

Job Plan:  >>

Job Plan Revision #:

Location: BR450 >> Feed Water Pump- Centrifugal/100GPM/60FTHD

Asset: 11450 >> Centrifugal Pump 100GPM/60FTHD

Approved By:  >>

Approval Date:

Lock Out / Tag Out:  >>

Classification:  >> Category:

Class Description:

Type:

Operational Risk Assessment?

Most Significant Risk Ranking:

Most Significant Risk Priority:

**Risks** 0 - 0 of 0

Hazard	Description	Consequence	Severity	Risk Ranking	Mitigated Risk Ranking
There are no rows to display.					

Select Hazards

**Precautions** 0 - 0 of 0

Precaution	Description	Organization	Site	Precaution Confirmed?	Date
There are no rows to display.					

Select Precautions

**Select Value** **Type**

Filter > 1 - 7 of 7

Value	Description
HAZARD	Hazard Review
IMPACT	Impact Assessment
JSR	Job Safety Review
LOCATION	Location Safety Review
MOC	MOC Risk Assessment
PROJECT	Project Risk Assessment
TRA	Task Risk Assessment

**Select Value** **Category**

Filter > 1 - 6 of 6

Value	Description
BUSINESS	Business Risk
ENVIRONMENTAL	Environmental Risk
OPERATIONAL	Operational Risk
PROJECT	Project Risk
REPUTATION	Corporate Reputation
SAFETY	Safety Risk

Find Risk Assessment



Find Navigation Item

- List
- Risk Assessment
- Hazard Review**
- Review and Approval
- Checklist
- Environmental Risk
- Assessment Team
- Specifications
- Related Records
- Log

Risk Assessment: 1006

JSA - Working at height

Status: DRAFT

Organization: EAGLENA

Type:  Category:

### Summary

Hazard Summary:

Total Score:

Complete the responses for each review action. Add comments, as needed. If an icon is present against a review action, expand the row and complete the responses for the Review Items.

### Review Actions

Filter > 1 - 9 of 9

Standard Action	Description	Yes?	No?	Not Applicable?	Alphanumeric	Score	Completed?	Sign Off
JSA9	Is there a heat hazard?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	
JSA8	Is there a pressurised equipment hazard?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	
JSA7	Is there any manual handling involved?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	
JSA6	Is there potential for dropped objects?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	
JSA5	Will lifting equipment be required?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>		<input type="checkbox"/>	
JSA4	Will there be any handling of a hazardous sul	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	
JSA3	Is work in a confined space required?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	
JSA2	Is there any electrical hazard?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	
JSA1	Is working at height required?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	

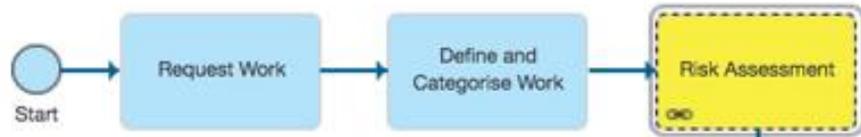
Select Actions Select Action Group New Row

Go To Operational Actions

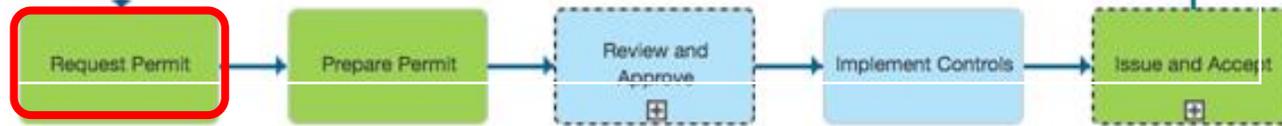
- Go To Applications
- Available Queries
- All Records
- All Bookmarks
- Common Actions
  - New Risk Assessment
  - Save Risk Assessment
  - Clear Changes
  - Change Status
  - Select Owner
  - Take Ownership
  - Create Report
- More Actions
  - View Risk Assessment History
  - Create
  - Modify/Delete Work Log
  - Attachment Library/Folders
  - Duplicate Risk Assessment
  - Delete Risk Assessment
  - Add to Bookmarks
  - Run Reports

Control of Work Process

Maintenance Manager



Operations Manager





Permit to Work

Find Permit      

- List View**
- Permit to Work
- Hazards and Isolations
- Review and Approval
- Checklist
- Issue and Acceptance
- Toolbox Talk
- Handback and Cancellation
- Related Records
- Emergency Actions
- Log

Permit Header:

Permit: 1003 

Extension: 0

Permit Risk Level: 

Permit and Certificate Type: 

Status: REQUEST

Site: BEDFORD 

Owner:

Owner Group:

Attachments

Template?

Permit Class: PERMIT 

### Permit Details

Required Date:  Validity: 

Working Hours:  Units: 

Details:



Font:  Size:  Format: None

### Issue Summary

Original Start: 

Start: 

Finish: 

Created: 2/12/18 3:32 AM 

Total Duration: 0D 0H 0MIN

Valid Until: 

Find Permit



- List View
- Permit to Work
- Hazards and Isolations
- Review and Approval
- Checklist
- Issue and Acceptance
- Toolbox Talk
- Handback and Cancellation
- Re

Permit: 1003

Extension: 0

Status: REQUEST

Permit and Certificate Type:

Permit Risk Level:

Site: BEDFORD

- Risk Assessment
- Hazard Review
- Gas Testing
- Conditions for Work
- Isolations
- Hazardous Materials

### Details

Risk Assessment:

Comments:

Font: Size: Format: None

Category:

Most Significant Risk Ranking:

Risk Assessment Copied from Work Order or Task?

Copied Risk Assessment Revised?



List View

Permit to Work

Hazards and Isolations

Review and Approval

Checklist

Issue and Acceptance

Toolbox Talk

Permit:



Extension:

Status:

REQUEST

Permit and Certificate Type:



Permit Risk Level:



Site:

BEDFORD



## Toolbox Talk Completion

Toolbox Talk?

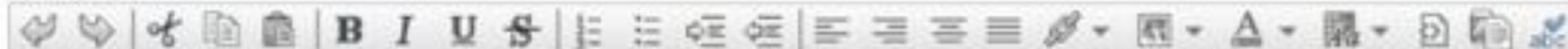
Toolbox Talk Completed By:



Toolbox Talk Completed:



Comments:



Permit to Work Details

# HOT WORK PERMIT

Permit No: 1002  
Permit Description: Hot Work in Main Switch Yard  
Extension: 0  
Type: HOTWORK  
Status: DRAFT

Task Details

Permit Level: 1 Owner Group: Validity: (with Units) 0 Duration: 0
Site: BEDFORD Unit: Area: Location: NEEDHAM Location Description: Needham Site Asset: Asset Description: Zone Classification:

Requested By: WILSON Site Checked By: Site Checked Date: Confined Space Controller:
Originating Work Order: Description: Originating Task: Description: Activity Category: Commissioning Specialist Isolation: Reason for Isolation:

Cancellation

Work Completed: N Returned to Safe Condition: N Isolation Removal Verified: N Returned to Production: N Inhibits Removed: N
---

Performing Authority: Issuing Authority: Isolating Authority: Area Authority: Issuing Authority:
--

Work Completed: Returned to Safe Condition: Isolation Removal Verified: Returned to Production: Inhibits Removed:
---

Review

Reviewed By: Reviewed Date:
--------------------------------



# Work Order Tracking

Find Work Order:         

- List
- Work Order**
- Plans
- Assignments
- Related Records**
- Actuals
- Safety Plan
- Log
- Failure Reporting
- Specifications
- Service Address
- Details
- Regulations
- Map

Work Order: <input type="text" value="1373"/>	<input type="text"/>	Site: <input type="text" value="BEDFORD"/>	Attachments 
Location: <input type="text"/>	<input type="text"/>	Class: <input type="text" value="WORKORDER"/>	Status: <input type="text" value="WAPPR"/>
Asset: <input type="text"/>	<input type="text"/>	Work Type: <input type="text"/>	Status Date: <input type="text" value="2/12/18 11:59 AM"/>
Configuration Item: <input type="text"/>	<input type="text"/>	GL Account: <input type="text"/>	Inherit Status Changes? <input checked="" type="checkbox"/>
Parent WO: <input type="text"/>	<input type="text"/>	Failure Class: <input type="text"/>	Accepts Charges? <input checked="" type="checkbox"/>
Classification: <input type="text"/>	<input type="text"/>	Problem Code: <input type="text"/>	Is Task? <input type="checkbox"/>
Class Description: <input type="text"/>	<input type="text"/>	Storeroom Material Status: <input type="text"/>	Under Flow Control? <input type="checkbox"/>
Launch Entry Name: <input type="text"/>	<input type="text"/>	Direct Issue Material Status: <input type="text"/>	Suspend Flow Control? <input type="checkbox"/>
Audit: <input type="text"/>	<input type="text"/>	Work Package Material Status: <input type="text"/>	Flow Action: <input type="text"/>
		Material Status Last Updated: <input type="text"/>	Flow Action Assist? <input type="checkbox"/>

### Completions

Completion Stage: <input type="text"/>	Test Certification? <input type="checkbox"/>	Technical Authority Type: <input type="text"/>
Test Type: <input type="text"/>	Certificate Type: <input type="text"/>	Technical Authority: <input type="text"/>

### Job Details

### Asset Details

### Priority

Job Plan: <input type="text"/>	Asset Up? <input type="checkbox"/>	Asset/Location Priority: <input type="text"/>
Job Plan Revision #: <input type="text"/>	Warranties Exist? <input type="checkbox"/>	Priority: <input type="text"/>
PM: <input type="text"/>	SLA Applied? <input type="checkbox"/>	Priority Justification: <input type="text"/>
Safety Plan: <input type="text"/>	Charge to Store? <input type="checkbox"/>	<b>Risk Assessment: <input type="text"/></b>
Contract: <input type="text"/>	Current Value: <input type="text"/>	Operating Policy: <input type="text"/>
Condition for Work: <input type="text"/>		Assurance Activity? <input type="checkbox"/>

Find Work Order        

- List
- Work Order
- Plans
- Assignments
- Related Records**
- Actuals
- Safety Plan
- Log
- Failure Reporting
- Specifications
- Service Address
- Details
- Regulations
- Map

Work Order:   Site:  Status:

**Related Work Orders** [Filter](#) >     0 - 0 of 0 

Work Order	Description	Class	Status	Relationship
There are no rows to display.				

**Related Tickets** [Filter](#) >     0 - 0 of 0 

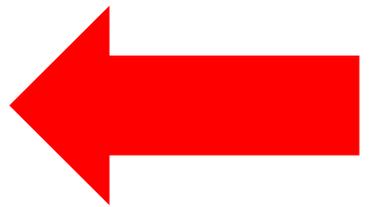
Related Record Key	Description	Class	Status	Relationship
There are no rows to display.				

**Related Permits to Work and Isolation Certificates** [Filter](#) >     1 - 2 of 2 

Related Record	Description	Class	Permit and Certificate Type	Status	Relationship
<input type="text" value="1029"/> 	<input type="text" value="Confined Space"/>	 PERMIT	 CONFSPACE	REQUEST	 RELATED 
<input type="text" value="1030"/> 	<input type="text" value="Hot Work"/>	 PERMIT	 HOTWORK	REQUEST	 RELATED 

**Related Operator Log Entries** [Filter](#) >     0 - 0 of 0 

Shift Log	Description	Log Entry	Summary	Log Date	Relationship
There are no rows to display.					





# Regulatory Compliance

Find Regulator



List View

Regulation

Log

Where Used

Regulation:

NFPA10

Standard for Portable Fire Extinguishers

Organization:

Site:

Applies To:

GENERIC

Regulation Owner:

Owner Group:

Status:

ACTIVE

Regulation Type:

SAFETY

Attachments

Status Date:

4/20/17 5:40 AM

Regulation Number:

NFPA10

Valid From:

4/20/17

Regulation Sub-Section:

Expiration Date:

Safety Critical Element:

External System Reference:

Regulatory Authority:

National Fire Protection Association

Insurance Requirements?

Regulatory Region:

Supports Safety Case?

Regulatory Country:

United States

Safety Case Reference:

Details:



Font

Size

Format None

Associate Regulations to  
different Objects

Regulatory Compliance

Mike Wilson

Find Regulation

List View Regulation Log Where Used

Regulation: NFPA10 Standard for Portable Fire Extinguishers

Status: ACTIVE

Organization:

Site:

Assets Locations Job Plans Hazards Permit and Certificate Types Operating Policies Operating Procedures Items PMs Audit and Survey

Assets Filter 1 - 1 of 1

Asset	Description	Site
1004	Fire Extinguisher	BEDFORD

Work Order Tracking

Mike Wilson

Find Work Order

List View Work Order Plans Assignments Related Records Actuals Safety Plan Log Data Sheet Failure Reporting Specifications Service Address Details **Regulations**

Map

Work Order:  Site: BEDFORD Status: WAPPR

**Work Order**

Regulations Filter > 0 - 0 of 0

Regulation	Description	Regulation Number	Regulation Type	Regulatory Authority	Applies to Work Order?
There are no rows to display.					

Preventive Maintenance

Mike Wilson

Find PM

Find Navigation Item

List View PM Frequency Seasonal Dates Job Plan Sequence PM Hierarchy Forecast **Regulations**

Go To Applications Available Queries All Records All Bookmarks RSB1 Common Actions New PM Save PM

PM: MPM-6767 Fire Extinguisher Master PM Site: BEDFORD Status: DRAFT

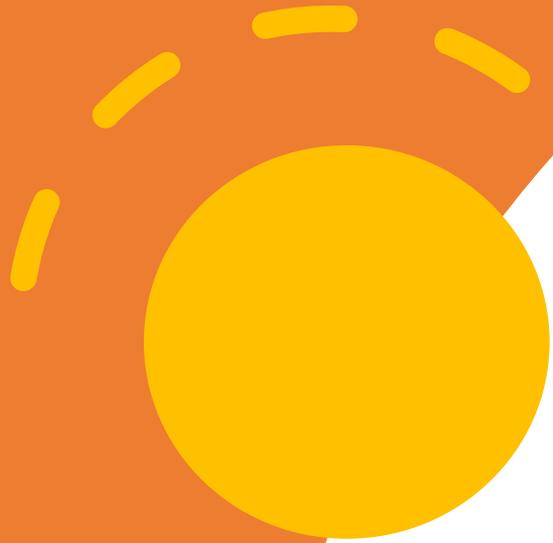
**PMs**

Regulations Filter > 1 - 2 of 2

Regulation	Description	Regulation Number	Regulation Type	Regulatory Authority
REG41KC	Fire protection performance standard	Internal	SAFETY	
NFPA10	Standard for Portable Fire Extinguishers	NFPA10	SAFETY	National Fire Protection Association

Select Regulations New Row

1. Track Compliance Cost
2. Prove Compliance during audit
3. PMs to Schedule the Compliance Activities

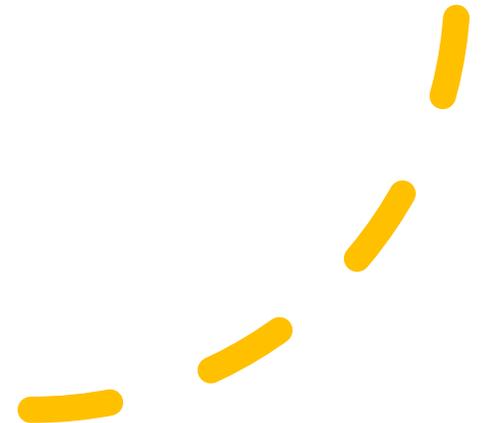


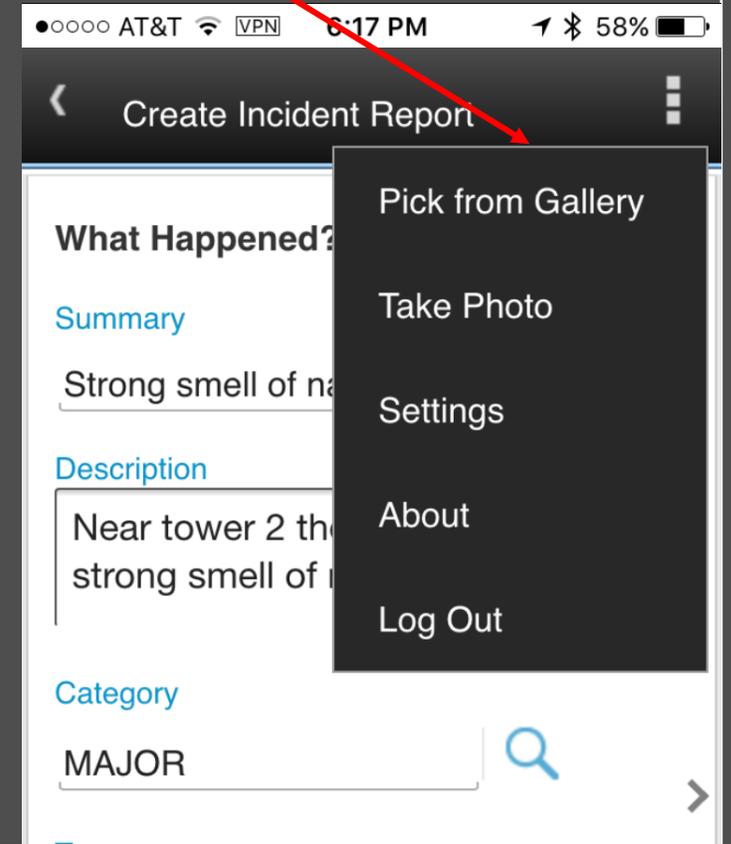
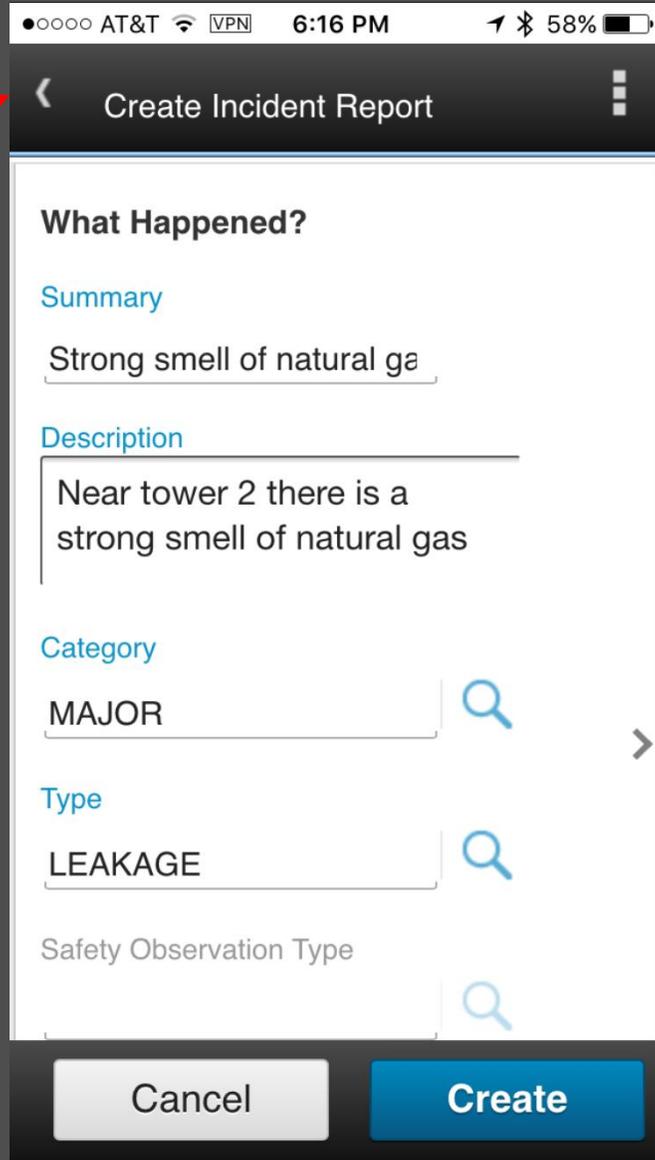
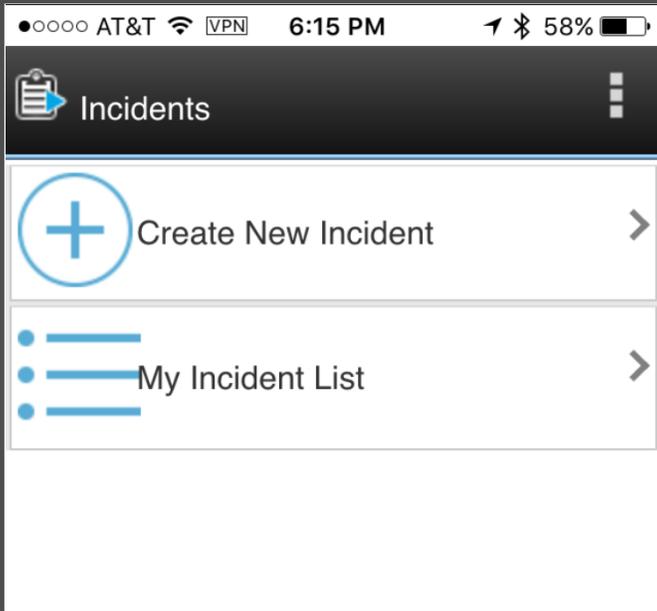
# Incident Management

# Mobile Incident Reporter

Quickly capture the details related to an incident

- What Happened?
  - Where did it Happen?
  - Who was involved?
  - What did you do about?
- 
- Capture all types of incidents / near misses
  - Safety Observations
  - Hazard Reporting
  - Injury / Illness
  - Accidents....





AT&T 8:22 PM 33%

Attachment Details

Name \*

Leaking Hose Junctio

Description

The second hose from the right

Folder

Attachments

File Type

jpg

File Size (KB)

522

Cancel Save



●○○○ AT&T 6:19 PM 57%

< Create Incident Report

Address Description

Location

Tap to enter

0134

Asset

Tap to enter

0134

Cancel Create

●○○○ AT&T 6:18 PM 57%

< Create Incident Report

Where did it happen?

Capture GPS coordinates?

Street Address

City

State

Tap to enter

Address Description

Cancel Create

AT&T VPN 6:21 PM 57%

### Create Incident Report

Asset

Tap to enter 

 0134

Who was invol... 1  

Action Taken

Action Taken 



Action Taken Comment

### Add Persons Impacted

Name

Phone

E-mail

Person Role

Tap to enter 

### Select Value

Injured/III	Indicates that the person was injure...
Primary	Incident is a direct result of the acti...
Secondary	Incident is an indirect result of the a...
Witness	Indicates that the person is a witness

### Select Value

5
<b>AUTHORITY</b> Reported to Authority
<b>SOLUTION</b> Temporary Solution in P...
<b>SUPERVIS...</b> Reported to Supervisor
<b>VICINITY</b> Warning Placed in Vicinity
<b>VIOLATION</b> Advised Violator of Viol...

# Incident Management Start Center

Welcome, Mike Wilson
Mike Wilson

Find Navigation Item

**Go To Applications**

- My Recent Applications
- Administration
- Analytics
- Assets
- Change
- Change (Oil)
- Contracts
- Financial
- IT Infrastructure
- Integration
- Inventory
- Operations (Oil)
- Planning
- Preventive Maintenance
- Purchasing
- Release
- Safety and Quality Manag...
- Security
- Self Service
- Service Desk
- Service Level
- System Configuration
- Task Management
- Work Orders

Administration
New Template
Report Admin

**Incident Reporting Center**

- ⚠ Safety Observation - Near Miss
- ⚠ Hazard Report - Near Miss
- ⚠ Injury-Illness - Minor
- ⚠ New Incident

**Security, Users and Groups**

- Users
- Security Groups
- People
- Person Groups

**Workflow Configuration**

- Workflow Designer
- Roles
- Actions
- Communication Templates
- Workflow Administration
- Escalations

**Reporting**

- Report Administration
- KPI Manager

**Bulletin Board**

There are currently no bulletin board messages to view.

**Major Leak Incidents**

Reported Date	Incident	Reported By	Phone	Incident Category	Incident Type	Summary
9/15/16 6:15 PM	1229	WILSON	(617) 555-9017	MAJOR	LEAKAGE	Strong smell of natural gas

1 - 1 of 1

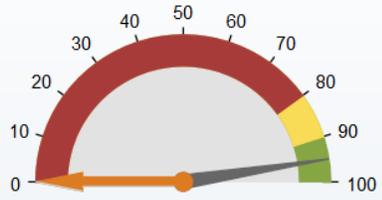
**Inbox / Assignments**

No Assignments found for Mike Wilson

**PM vs CM Work - All Work Orders (%)**

Last Run: 9/15/16 9:36 PM [Update](#)

Status	KPI	Actual	Target	Variance
<span style="color: red;">■</span>	PM Performance (%)	0	95	-95



**Bedford Work Orders**

Chart Type: [BAR](#) View By: [Priority](#)

Incident:  
 Owner:  
 Owner Group:  
 Incident Type:  
 Incident Category:  
 Safety Observation Type:  
 Status:

**Address Information** ☐

**User Information** ☐

**Incident Details** ☐

Summary:  
 Site:  
 Reportable?

Classification:  
 Class Description:

Reported Priority:  
 Internal Priority:

Is Defect?  
 Investigation Required?  
 High Context?  
 From Review Required?  
 SLA Applied?

Details:   
 Near tower 2 there is a strong smell of natural gas

Action Taken:

Action Taken Details:   
 Reported to Area Supervisor

**Persons Impacted by Incident** Filter > 1 - 1 of 1

Person Impacted	Name	Phone	E-mail	Person Role	External Person?
▶ SMITH	▶▶ Roland Smith	▶▶ (617) 375-888	roland.smith@interspeed.net	Witness	<input type="checkbox"/>

**Attachments** Filter > 1 - 1 of 1

Document	Description
<u>LEAKING HOSE JUNC</u>	The second hose from the right

**Risk and Consequence** ☐ **Impact** ☐

Hazard:  
 Worldwide Incident?  
 Global Issue?

Risk Assessment:  
 Regional Incident?  
 Related to Global ID:

# Maximo HSE Manager 7.6.2 business processes

## Major Business Processes

Detailed Business Processes

Operations Management	Control of Work	Asset & Work Management	HSE Management	Compliance	Management of Change	Knowledge Management
Manage operator logs	Risk Management	Asset management	Incident Management	Regulatory Compliance	Management of Change	Capturing Knowledge
Shift handover	Permit to Work	Defect Management	Investigation Management	Managing non-conformance	Continuous Improvement	Identifying Solutions
Operator Rounds	Isolation Management	Work Management	Managing Corrective Action	Audit Management		Checklist Management
Operator Tasks	Access Permits	Turnaround management	Certification, regulatory permits and environmental Consents	Resource Management		
Managing Operational Actions	Lock Management	Failure management	Mobile Incident Reporting	Training and Competency Management		
Define operating policies and procedures	Hazard Management	Construction and Commissioning Management		Managing Supply Chain Quality		
Production loss reporting	Bypass Management			Manage Configuration Items		

Q&A



## Florida MUG 2023 Attendee Survey





# What did you enjoy and what could be improved for next time? 57 Answers

Interactions

Common forgot solutions

Customer Stories! Keep those going! Shortcuts and tips, more please!

hot lunch is a great idea - well done

Enjoy - networking and interractions

Various industries using maximo

Enjoyed the location

Networks opportunities

Great presentation. Wish I had known about this sooner!

# What did you enjoy and what could be improved for next time?

57 Answers

I thought everything was well organized and presented :)

Liked location and presentations as well as meeting other users

More demos for functioning Inspections

Personal networking activities

Interactive demos of features

Improve - food

I enjoyed the range of topics. I would like to see more in depth examples of how companies are using maximo, some of the presenters didn't show real life examples and only verbally spoke on it.

Enjoyed the networking opportunity with clients and understanding their use cases

Great presentations

# What did you enjoy and what could be improved for next time? 57 Answers

Enjoy the networking and success stories

Good use cases

Old solutions

Great location and venue. Useful information

Sooner communication about the night before activity. If I knew it was happening earlier I could have come up the night before.

The Supply Chain presentation was great

More client to client interaction

Good food.

Next time - cupcakes

# What did you enjoy and what could be improved for next time? 57 Answers

Networking.

Presentations from other businesses

Enjoyed networking opportunities.

Food great

Enjoy networking

Wish there was more mobile

Networking

Great location!

Meet in Person

# What did you enjoy and what could be improved for next time? 57 Answers

Dedicated website to be able to find info on next meetings.

Access to Power sources for laptops would be nice

Chris gave an informative presentation on some basic Maximo tips. More tips and tricks would be great.

Seeing people that I haven't seen in 4 years

Enjoyed the Maximo functionality insight, location, use case demonstration

Demos

Preview of last meeting to see what prep is needed for presentation.

Iteractive

More tacos

# What did you enjoy and what could be improved for next time? 57 Answers

Demos

Enjoyed networking

Have the robot dog here

The different industries and their stories and use cases of how they use maximo in their environment More ways to interact and see the solution as well as hearing more from the partners

Have us introduce ourselves - around the room. Open discussion time.

MREs

Networking

I enjoyed the variety of attendees and location. Next time future of Maximo

Sam needs to sing more'

# What did you enjoy and what could be improved for next time? 57 Answers

Robot dog for sure

More Cowbell

Tacos on Tuesday.