# Overtime Offer Tracking

## In Maximo

GAMUG June 2023

Andrew Apold, Bryan Grant and Travis Davis

© 2023 Lockheed Martin Corporation. All rights reserved.

# People

**105,000**
Employees

**54,000**
Scientists and Engineers

**375+**
Facilities Worldwide

Operating in over
**54** Countries

With **7,500+**
Employees

© 2023 Lockheed Martin Corporation. All rights reserved.
Lockheed Martin Proprietary Information

# Lockheed Martin Business Areas

## Aeronautics

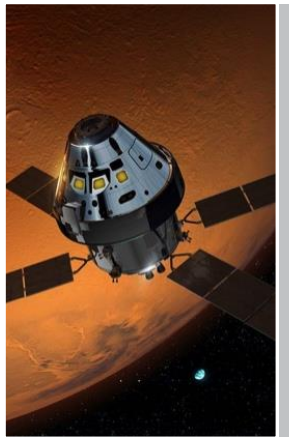
- Tactical Fighters
- Tactical /Strategic Airlift
- Advanced Development
- Sustainment Operations

## 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


© 2023 Lockheed Martin Corporation. All rights reserved.
Lockheed Martin Proprietary Information

© 2023 Lockheed Martin Corporation. All rights reserved.

Lockheed Martin Proprietary Information

# Lockheed Martin Aeronautics

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


© 2023 Lockheed Martin Corporation. All rights reserved.

Lockheed Martin Proprietary Information

# 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)


© 2023 Lockheed Martin Corporation. All rights reserved.
Lockheed Martin Proprietary Information

# 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.


© 2023 Lockheed Martin Corporation. All rights reserved.

Lockheed Martin Proprietary Information

# Example Spreadsheet

| | | | | | | |
|---|---|---|---|---|---|---|
| | | | | 9/26/2020 0:00 | | |
| | | A/C MACHANIC | DAY | 7/25/2020 0:00 | | |
| | T.O.Shield | IWT OPERATOR | | #REF! | 0 | |
| 5 | Burns, M. | GROUNDS DRIVER | GRAVAYARD | #REF! | 1383.5 | |
| 1 | | CARPENTER | SWING | #REF! | 1388 | |
| 4 | | GROUNDS OPERATOR | | #REF! | 1388 | |
| 7 | 11/16/2009 | | | #REF! | 1389 | |
| 2 | | | | #REF! | 1389.5 | |
| 6 | | PAINTER | | #REF! | 1390.5 | |
| 3 | | 4/4/2019 | | #REF! | 1405 | |
| | | | | #REF! | | |
| | | | | #REF! | | |
| | | | | #REF! | | |
| | | PIPE WELDER | | #REF! | | |
| | | PLUMBER/WELDER | 1 | #REF! | | |
| | | | | #REF! | | |
| | | | | | | |

RINTED
23 9:14


© 2023 Lockheed Martin Corporation. All rights reserved.
Lockheed Martin Proprietary Information

# 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
```


© 2023 Lockheed Martin Corporation. All rights reserved.

Lockheed Martin Proprietary Information

# 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 | Wario, B. | Wario, B. | 2005.08 | Do Not Call |


© 2023 Lockheed Martin Corporation. All rights reserved.

Lockheed Martin Proprietary Information

# 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


© 2023 Lockheed Martin Corporation. All rights reserved.

Lockheed Martin Proprietary Information

# Lockheed Martin Aero Maximo

- New Tables:

| OBJECTNAME | DESCRIPTION |
|---|---|
| LMOTOCHARGES | Overtime Tracking Charges |
| LMOTOINITHOURS | Overtime Tracking Initial Hours |
| LMOTOLISTS | Overtime Tracking Lists Table |
| LMOTOLISTTEAM | Overtime Tracking List Team |


© 2023 Lockheed Martin Corporation. All rights reserved.

Lockheed Martin Proprietary Information

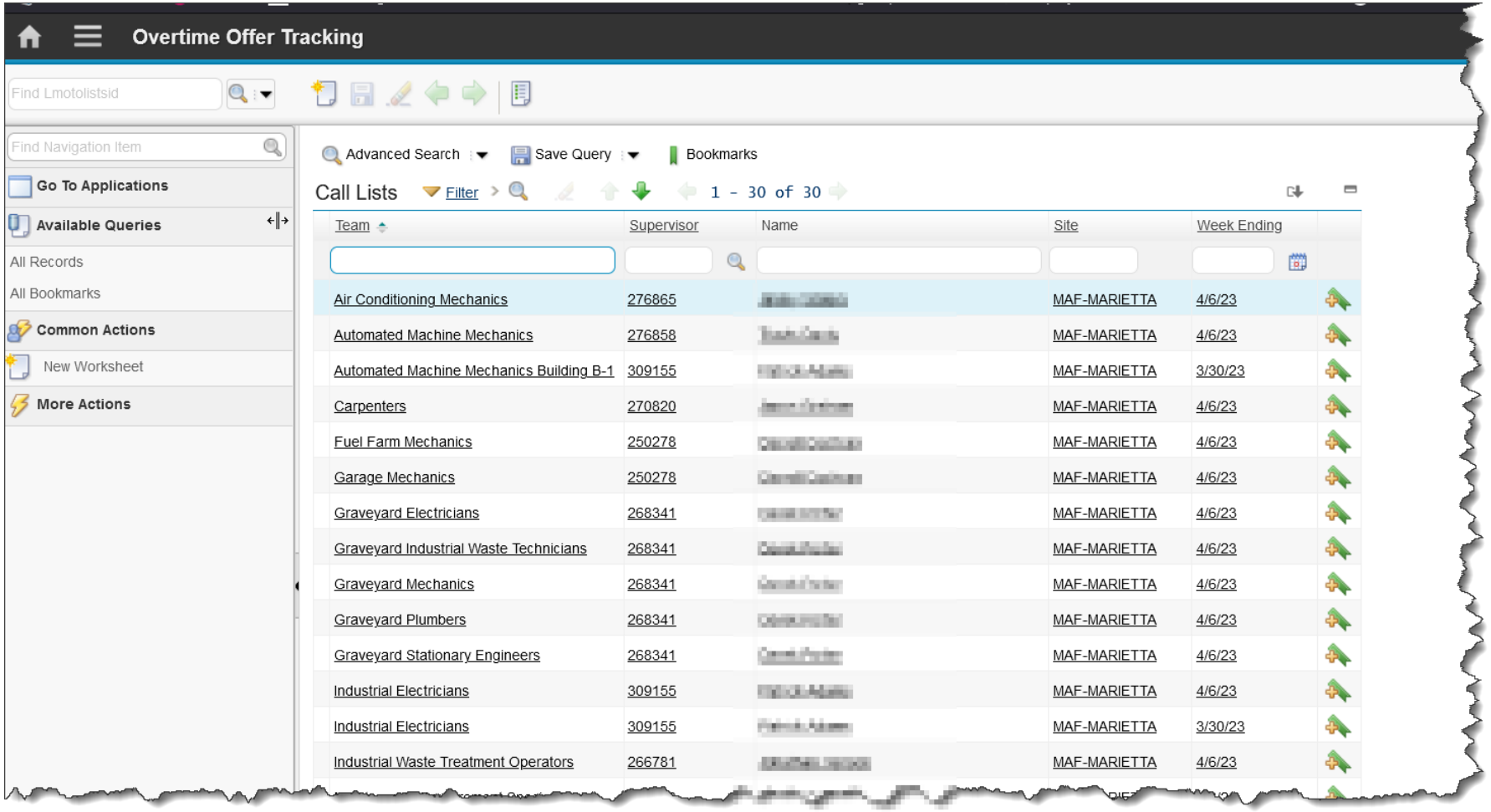
# Live Demo


© 2023 Lockheed Martin Corporation. All rights reserved.

Lockheed Martin Proprietary Information

# Lockheed Martin Aero Maximo

- New Custom Application:



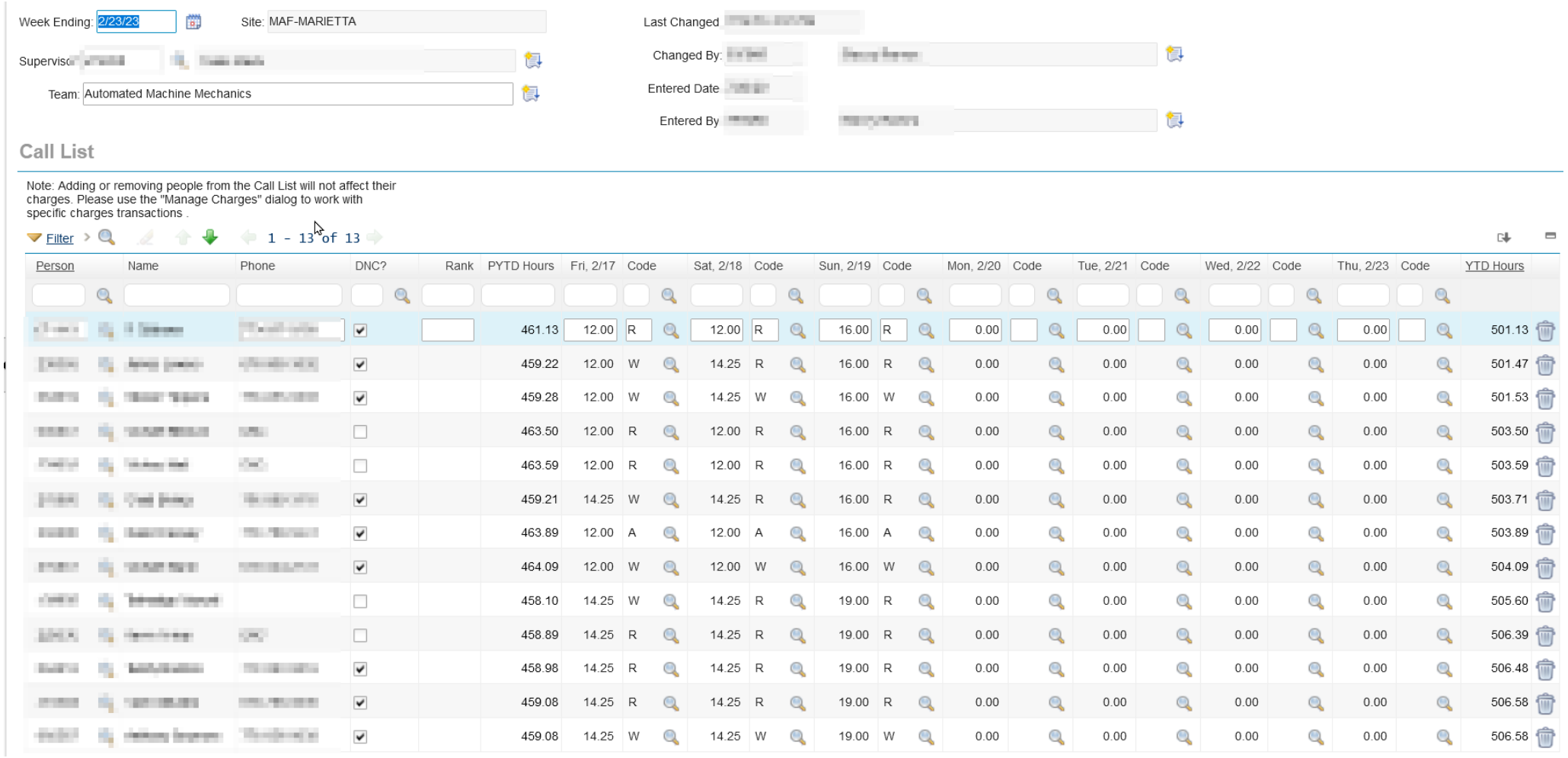


© 2023 Lockheed Martin Corporation. All rights reserved.

Lockheed Martin Proprietary Information

# Lockheed Martin Aero Maximo

- Week view of offered overtime:



Week Ending: 2/23/23 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

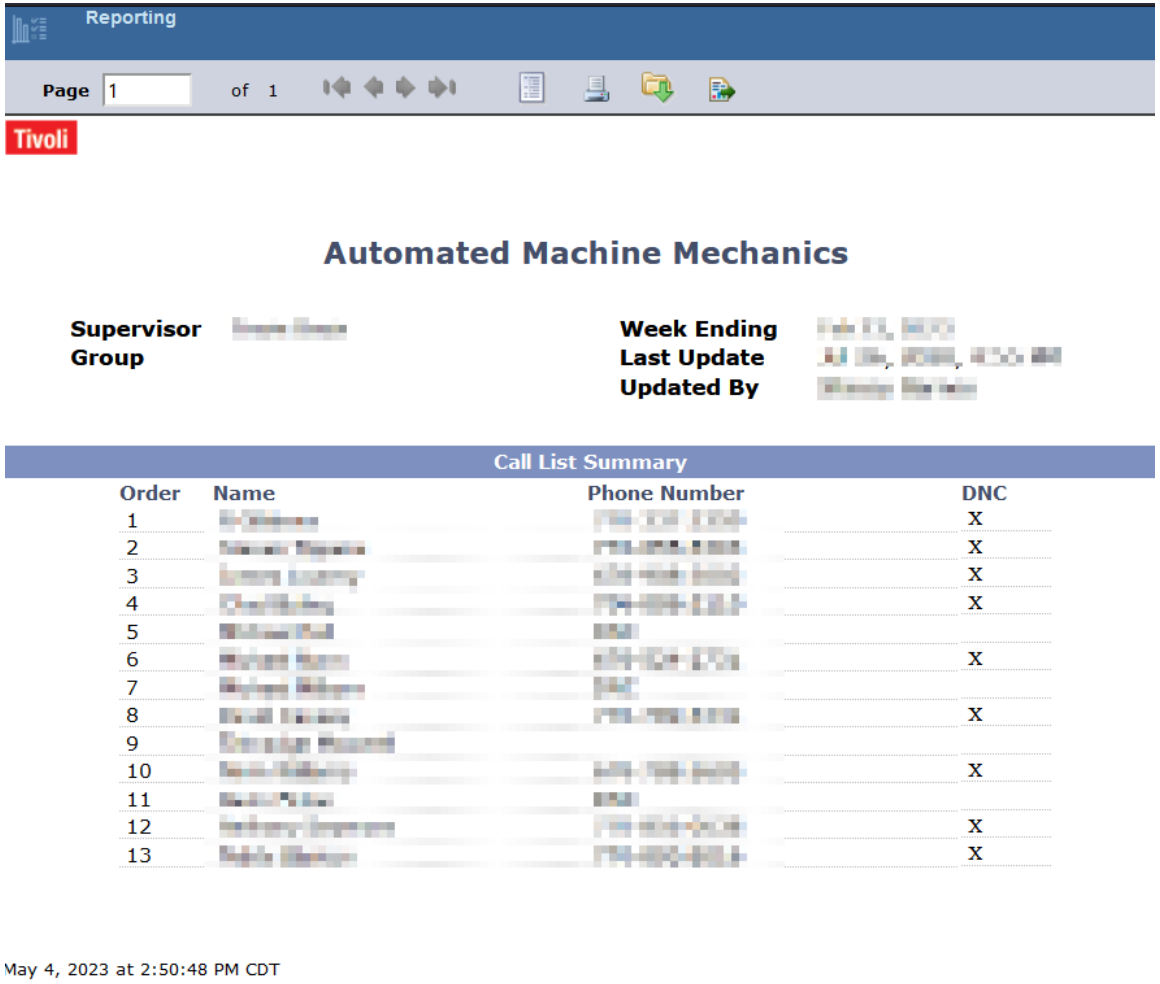
| Person | Name | Phone | DNC? | Rank | PYTD Hours | Fri, 2/17 | Code | Sat, 2/18 | Code | Sun, 2/19 | Code | Mon, 2/20 | Code | Tue, 2/21 | Code | Wed, 2/22 | Code | Thu, 2/23 | Code | YTD Hours |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | ☑ | | 461.13 | 12.00 | R | 12.00 | R | 16.00 | R | 0.00 | | 0.00 | | 0.00 | | 0.00 | | 501.13 |
| | | | ☑ | | 459.22 | 12.00 | W | 14.25 | R | 16.00 | R | 0.00 | | 0.00 | | 0.00 | | 0.00 | | 501.47 |
| | | | ☑ | | 459.28 | 12.00 | W | 14.25 | W | 16.00 | W | 0.00 | | 0.00 | | 0.00 | | 0.00 | | 501.53 |
| | | | ☐ | | 463.50 | 12.00 | R | 12.00 | R | 16.00 | R | 0.00 | | 0.00 | | 0.00 | | 0.00 | | 503.50 |
| | | | ☐ | | 463.59 | 12.00 | R | 12.00 | R | 16.00 | R | 0.00 | | 0.00 | | 0.00 | | 0.00 | | 503.59 |
| | | | ☑ | | 459.21 | 14.25 | W | 14.25 | R | 16.00 | R | 0.00 | | 0.00 | | 0.00 | | 0.00 | | 503.71 |
| | | | ☑ | | 463.89 | 12.00 | A | 12.00 | A | 16.00 | A | 0.00 | | 0.00 | | 0.00 | | 0.00 | | 503.89 |
| | | | ☑ | | 464.09 | 12.00 | W | 12.00 | W | 16.00 | W | 0.00 | | 0.00 | | 0.00 | | 0.00 | | 504.09 |
| | | | ☐ | | 458.10 | 14.25 | W | 14.25 | R | 19.00 | R | 0.00 | | 0.00 | | 0.00 | | 0.00 | | 505.60 |
| | | | ☐ | | 458.89 | 14.25 | R | 14.25 | R | 19.00 | R | 0.00 | | 0.00 | | 0.00 | | 0.00 | | 506.39 |
| | | | ☑ | | 458.98 | 14.25 | R | 14.25 | R | 19.00 | R | 0.00 | | 0.00 | | 0.00 | | 0.00 | | 506.48 |
| | | | ☑ | | 459.08 | 14.25 | R | 14.25 | R | 19.00 | R | 0.00 | | 0.00 | | 0.00 | | 0.00 | | 506.58 |
| | | | ☑ | | 459.08 | 14.25 | W | 14.25 | W | 19.00 | W | 0.00 | | 0.00 | | 0.00 | | 0.00 | | 506.58 |


© 2023 Lockheed Martin Corporation. All rights reserved.

Lockheed Martin Proprietary Information

# Lockheed Martin Aero Maximo

- Call In List via Report





© 2023 Lockheed Martin Corporation. All rights reserved.

Lockheed Martin Proprietary Information

# Observations

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


© 2023 Lockheed Martin Corporation. All rights reserved.
Lockheed Martin Proprietary Information

# Next Steps

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


© 2023 Lockheed Martin Corporation. All rights reserved.
Lockheed Martin Proprietary Information

# Questions?


© 2023 Lockheed Martin Corporation. All rights reserved.

Lockheed Martin Proprietary Information

GREAT DANE

# 10 + Years of Maximo at Great Dane Trailers

POWERED BY PROJETECH'S MAXIMO AS A SERVICE OFFERING

# Agenda

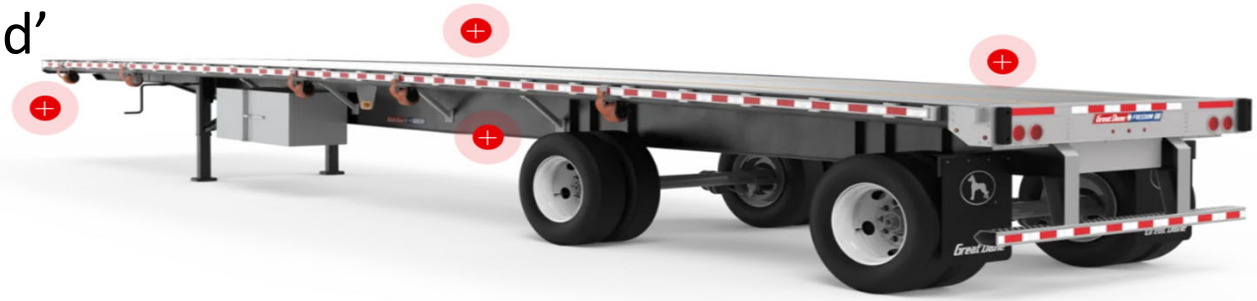
- Great Dane Trailers – who are we – Primary Product Lines
- Implementation Go-Live Milestones
- Implementation Areas
- Different Approaches taken by sites
  - Successes & Challenges
- Changes made

# Primary Product Lines

- Refrigerated

- Dry Vans

- Open Deck / ‘Flatbed’



# Implementation Milestones

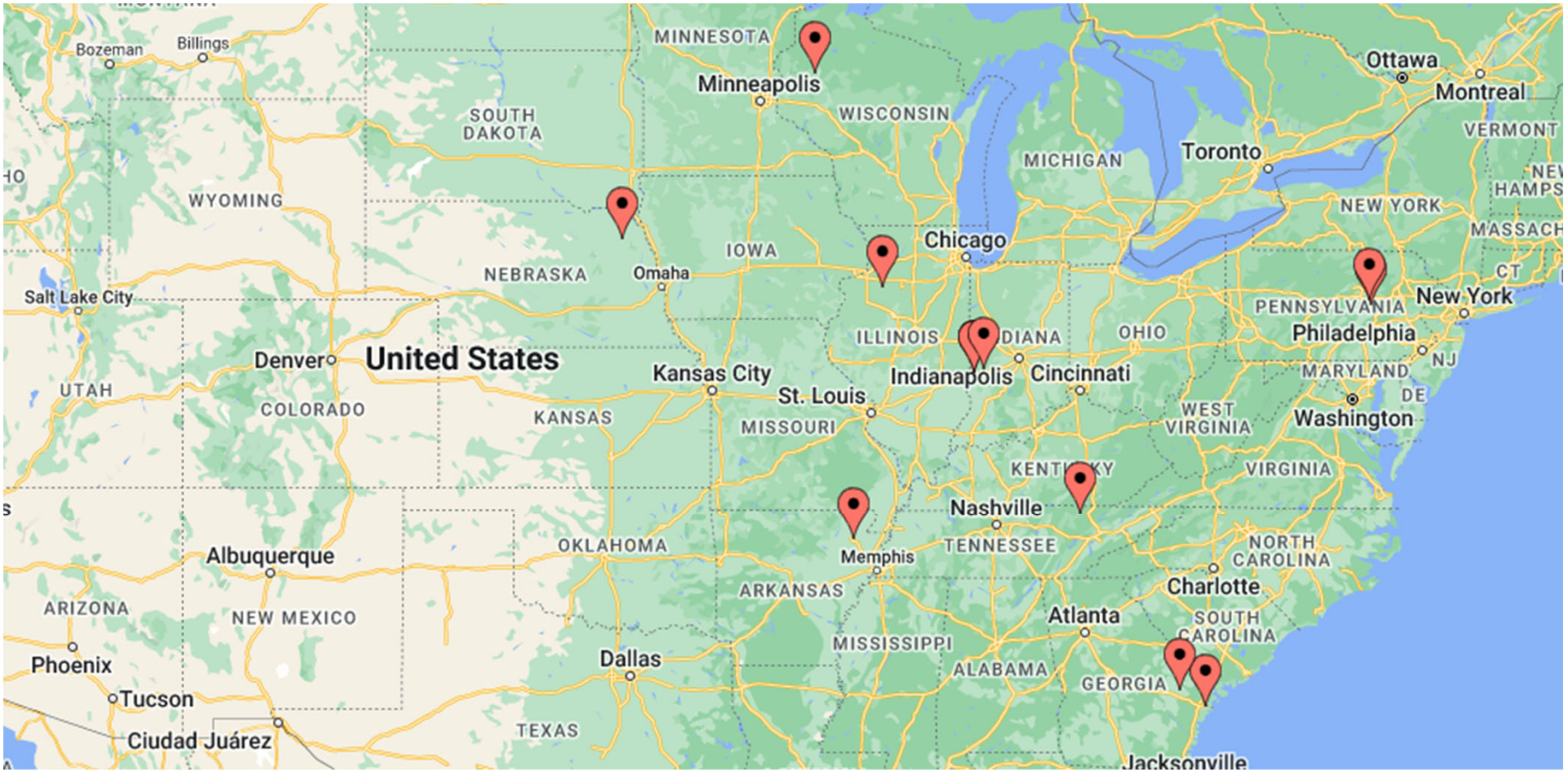
## Work Management

2011 – Statesboro, Georgia
2012 – Wayne, Nebraska
2013 – Danville, Pennsylvania
Kewanee, Illinois
2014 – Savannah / Corporate Engineering
Huntsville, Tennessee
Jonesboro, Arkansas
2017 – Brazil, Indiana
2018 – Terre Haute, Indiana
2019 – Elysburg, PA
2021 – Central Fab (Terre Haute, IN)
2022 – Rice Lake, Wisconsin
Kewanee, Illinois
2023 – CIE - Norfolk

## Inventory

2012 – Savannah / Corporate Engineering
2014 – Statesboro, Georgia
2017 – Terre Haute, Indiana
2018 – Wayne, Nebraska
Kewanee, Illinois
Huntsville, Tennessee
2019 – Jonesboro, Arkansas
Brazil, Indiana
2021 – Central Fab (Terre Haute, IN)
Elysburg, Pennsylvania

# Locations Implemented so far



# Common Implementation Startup Areas – Work Management

## Resources (Labor / Crafts)

## Locations and Assets

- Sites have different approaches to naming

## Work Management

- Preventive Maintenance
- Work Orders
- Job Plans

# Secondary Implementation Area1 – Inventory

## Using Inventory Well

- Statesboro (clerk/planner)
- Terre Haute (clerk & strong mgmt.)
- Central Fab (small inv; strong mgmt.)

## In Progress

- Wayne (good progress; fair cooperation)
- Brazil (well controlled but not tracked on w.o.'s)
- Huntsville (good control; some on w.o.'s but not consistent)
- Kewanee (slow; not on w.o.'s)
- Jonesboro (ramping up with new supv and clerk/planner in place)

## Not using Inventory

- Danville (limited site support; clerk in place)
- Elysburg (limited site support; no clerk/planner

# Secondary Implementation Area 2 - Procurement

## Using Purchasing well

- Statesboro (Clerk & Planner in place)
- Terre Haute (clerk in place, strong management)
- Central Fab (small & manageable, good purchaser)
- Wayne (although tech cooperation is spotty, their planner cycle counts and uses purchasing to run reorder successfully)

## Sites still getting Purchasing controls in place

- Huntsville (rollout will happen in the next couple months; strong site support)

## Sites not using Purchasing

- Danville & Elysburg (little site support)
- Kewanee & Jonesboro (still working on inventory)
- Brazil (not currently considered a priority at this site)

# Different approaches taken per site - successes

## Best site rollouts:

- Terre Haute – very strong management on site focused on maximizing Maximo and remains the best managed in our opinion
- Statesboro – implemented Maximo as plant was built. Started from scratch with corporate guidance. Both a clerk and planner in place.
- Central Fab – implemented Maximo as plant was built. Started from scratch with manager who had used Maximo at another facility and was familiar with its benefits. Computer friendly techs.

# Different approaches taken per site - challenges

## Biggest challenges are:

- Staffing – many sites either refuse to staff a clerk & planner or can’t keep the ones they hire
- Site Support – depending on the individual plant culture, some sites are on board, and some are not. It boils down to the individual managers and the relationship they have with their techs
- Tech cooperation – even with supportive managers, some techs dig their heels in

# Changes made to how business is done

## Upper management supports Maximo for its transparency

- Maximo provides data for monthly “maintenance governance packs” which display downtime by plant and the offending machines. Managers verify sites know where the problems are.
- Upper management has sites provide Maximo data when submitting Expense Authorizations for new equipment. Good way to quickly prove how much time and money goes into failing equipment.

## Transparency at site level is also important. Sites which have lost valuable, long-time employees like that Maximo can be used to ‘download’ tribal knowledge

- This was a problem before we implemented a CMMS

## Work order history used by corporate engineers to make design adjustments

# Asset & Production Downtime Template

| | |
|---|---|
| **Total Asset Downtime:** | 105:55 |
| **Total Production Downtime:** | 17:12 |
| **Total Labor Cost:** | 33,122.37 |
| **Total Material Cost:** | 25,043.81 |

| Work Order | Description | Asset | Location | Reported Date | Status | Work Type | Actual Finish | Asset Downtime Duration | Production Downtime Duration | Actual Labor Cost | Actual Material Cost |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 75902 | DECK DRILL #11 ON BENCH FOR REPAIR | DECKDRL19 | 1233 | 12/22/21 1:20:26 AM | CLOSE | CM | 1/7/22 11:30:00 AM | 00:00 | 00:00 | 12.50 | 0.00 |
| 76325 | CHECK GREASE POINTS ON MACHINES | DECKS2 | 1233 | 12/31/21 2:55:34 AM | CLOSE | PM | 1/7/22 7:10:00 AM | 00:00 | 00:00 | 11.27 | 0.00 |
| 76374 | DRILLS AND DRIVERS PM - LINE 2 WEEKLY THURSDAY | | 1233 | 12/31/21 3:00:07 AM | CLOSE | PM | 1/13/22 1:08:07 PM | 00:00 | 00:00 | 0.00 | 0.00 |
| 76399 | DAILY DECK MACHINE PM (LINE 1) MONDAY | DECKS1 | 1211 | 12/31/21 3:02:59 AM | CLOSE | PM | 1/4/22 6:07:39 AM | 00:00 | 00:00 | 0.00 | 0.00 |
| 76400 | DAILY DECK MACHINE PM (LINE 2) MONDAY | DECKS2 | 1233 | 12/31/21 3:03:11 AM | CLOSE | PM | 1/4/22 6:08:22 AM | 00:00 | 00:00 | 0.00 | 0.00 |
| 76475 | DAILY DECK MACHINE PM (LINE 1) TUESDAY | DECKS1 | 1211 | 12/31/21 3:07:51 AM | CLOSE | PM | 1/5/22 2:38:39 PM | 00:00 | 00:00 | 0.00 | 0.00 |
| 76476 | DAILY DECK MACHINE PM (LINE 1) WEDNESDAY | DECKS1 | 1211 | 12/31/21 3:08:02 AM | CLOSE | PM | 1/5/22 10:29:00 AM | 00:00 | 00:00 | 31.56 | 0.00 |
| 76477 | DAILY DECK MACHINE PM (LINE 2) TUESDAY | DECKS2 | 1233 | 12/31/21 3:08:14 AM | CLOSE | PM | 1/5/22 2:39:16 PM | 00:00 | 00:00 | 0.00 | 0.00 |
| 76478 | DAILY DECK MACHINE PM (LINE 2) WEDNESDAY | DECKS2 | 1233 | 12/31/21 3:08:27 AM | CLOSE | PM | 1/5/22 8:54:00 AM | 00:00 | 00:00 | 23.67 | 0.00 |
| 76578 | NUMBER1 FEEDER HOSE LOOSE | DECKS2 | 1233 | 1/4/22 6:16:30 PM | CLOSE | CM | 1/4/22 6:44:00 PM | 00:00 | 00:00 | 11.67 | 0.00 |
| 76591 | DRIVER #5 IS OUT OF ALIGNMENT | DECKDRV24 | 1211 | 1/4/22 8:47:32 PM | CLOSE | CM | 1/4/22 9:00:00 PM | 00:00 | 00:00 | 11.27 | 0.00 |

# Changes to culture

Culture has changed at sites which use Maximo well in that they've become accustomed to having work history and inventory info at their disposal.

Reduced time WMATL; easier to find spare parts (especially with clerks)

From Production standpoint, Production Supervisors and Team Leads like the Portal notifications for greater work order transparency

- Some sites also issue "shift notes" to the production team to show what work was done that shift with the tech's work logs

maximo

Great Dane

# TERRE WOs COMP or PENDING - NIGHT SHIFT

**Work Order: 109192** — **Actual Labor 00:22 Hours:**

| Description | Asset | Location | Reported Date | | Status | Status Date | | Lead | Summary |
|---|---|---|---|---|---|---|---|---|---|
| LINE 2 DECKS B2 DRIVE ERROR | DECKS2 | L2 DECKS / FLOORS | 5/16/23 | 5:03:51 PM | COMP | 5/16/23 | 7:44:31 PM | 40003811 | same comm error/ reseated cable at motor and drive |
| LINE 2 DECKS B2 DRIVE ERROR | DECKS2 | L2 DECKS / FLOORS | 5/16/23 | 5:03:51 PM | COMP | 5/16/23 | 7:44:31 PM | 40003811 | watched run and analyzed didn't see an issue |

**Work Order: 109193** — **Actual Labor 00:30 Hours:**

| Description | Asset | Location | Reported Date | | Status | Status Date | | Lead | Summary |
|---|---|---|---|---|---|---|---|---|---|
| MAIN BEAM SCREEN DOWN | GEN0217 | UPPER COUPLER | 5/16/23 | 5:26:03 PM | INPRG | 5/16/23 | 8:14:49 PM | 30024022 | hard reset twice with no luck |
| MAIN BEAM SCREEN DOWN | GEN0217 | UPPER COUPLER | 5/16/23 | 5:26:03 PM | INPRG | 5/16/23 | 8:14:49 PM | 30024022 | added mouse to seeif we could use it without touchscreen with no luck |
| MAIN BEAM SCREEN DOWN | GEN0217 | UPPER COUPLER | 5/16/23 | 5:26:03 PM | INPRG | 5/16/23 | 8:14:49 PM | 30024022 | need Allen Bradley panelview 5510 CAT 2715P-T10CD |

**Work Order: 109194** — **Actual Labor 00:20 Hours:**

| Description | Asset | Location | Reported Date | | Status | Status Date | | Lead | Summary |
|---|---|---|---|---|---|---|---|---|---|
| NOT CUTTING CORRECTLY | SH01 | FRONTS | 5/16/23 | 5:39:07 PM | COMP | 5/16/23 | 8:38:03 PM | 40003811 | checked back gage cut piece and was good |

**QUESTIONS?**

# Maximo Capabilities often forgotten

Chris Winston – Projetech
cwinston@projetech.com
https://www.linkedin.com/in/chriswinston

# About Projetech

Projetech, a Gold IBM Business Partner, offers IBM Maximo: the global standard in software for Enterprise Asset Management and maintenance. Since 1999, Projetech 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

ISO 27001 CERTIFIED A-LIGN

ISO 27017 CERTIFIED A-LIGN

IBM Gold Business Partner

ISO 9001:2015 CERTIFIED COMPANY

PRI Registrar PERFORMANCE REVIEW INSTITUTE

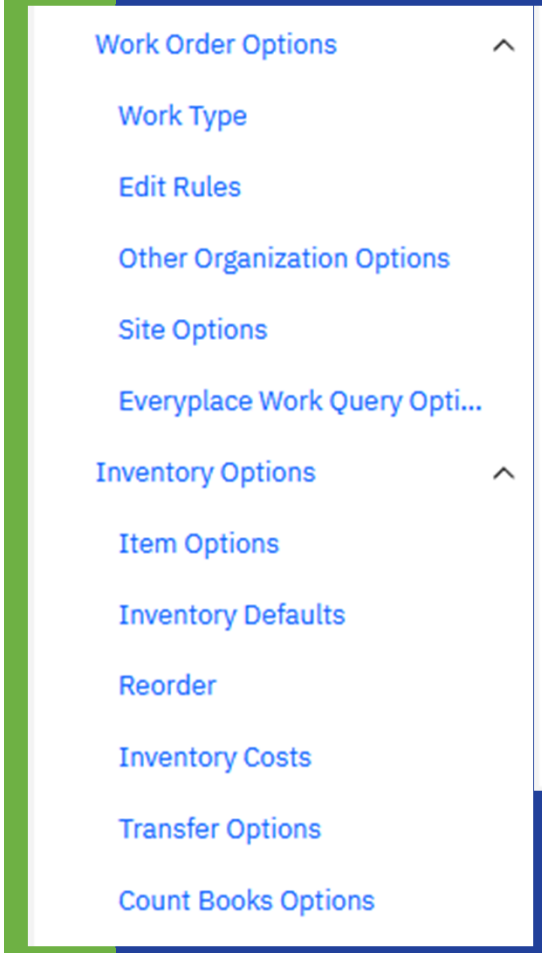
Projetech™ MAXIMO® CLOUD SOLUTIONS

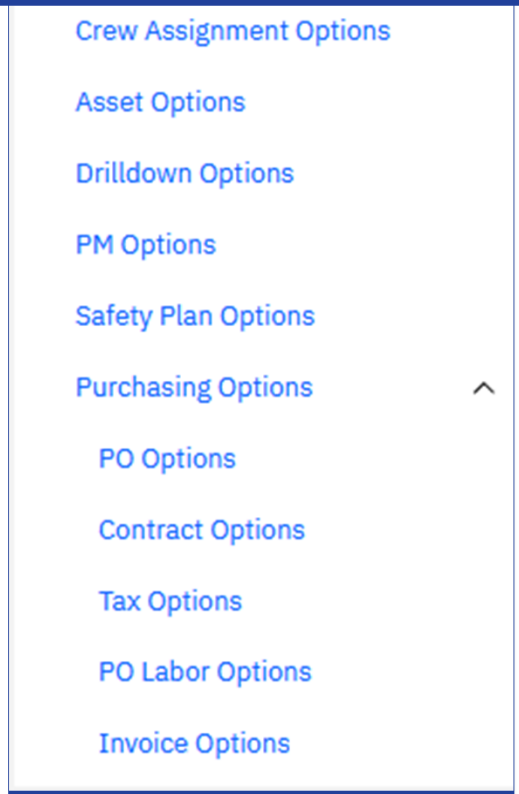
# Maximo comes with tools to alter it to fit your use cases

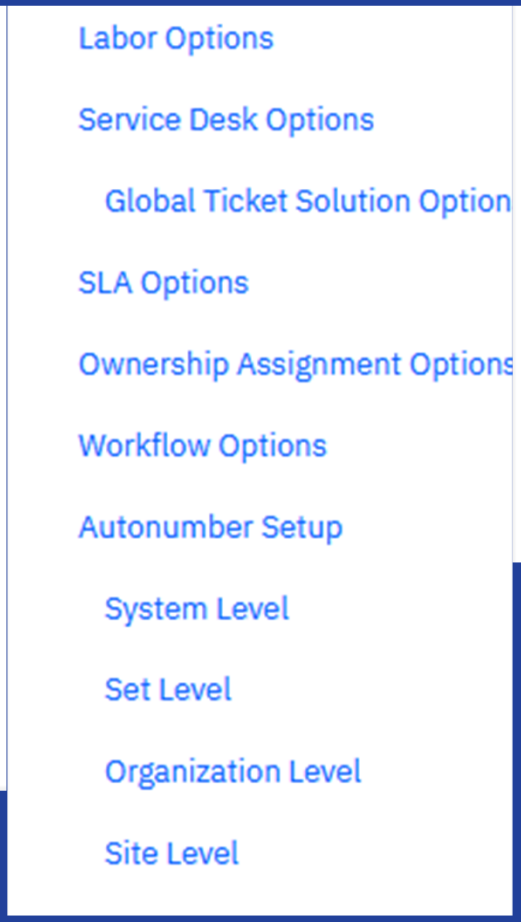
- Configuration & Tailoring
- ~~Customization~~

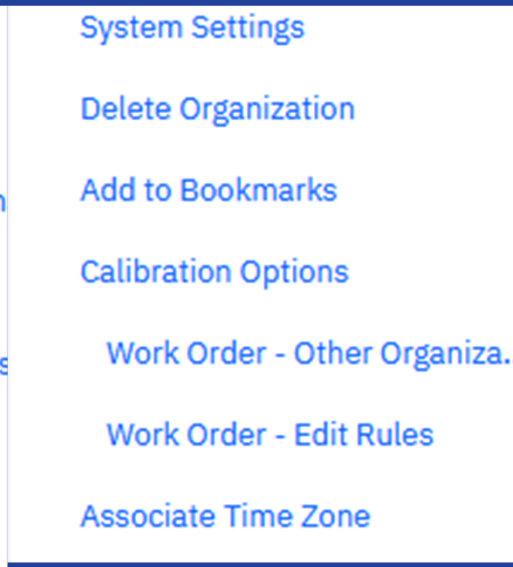
Projetech™
MAXIMO® CLOUD SOLUTIONS

# Organization Options – maybe too many



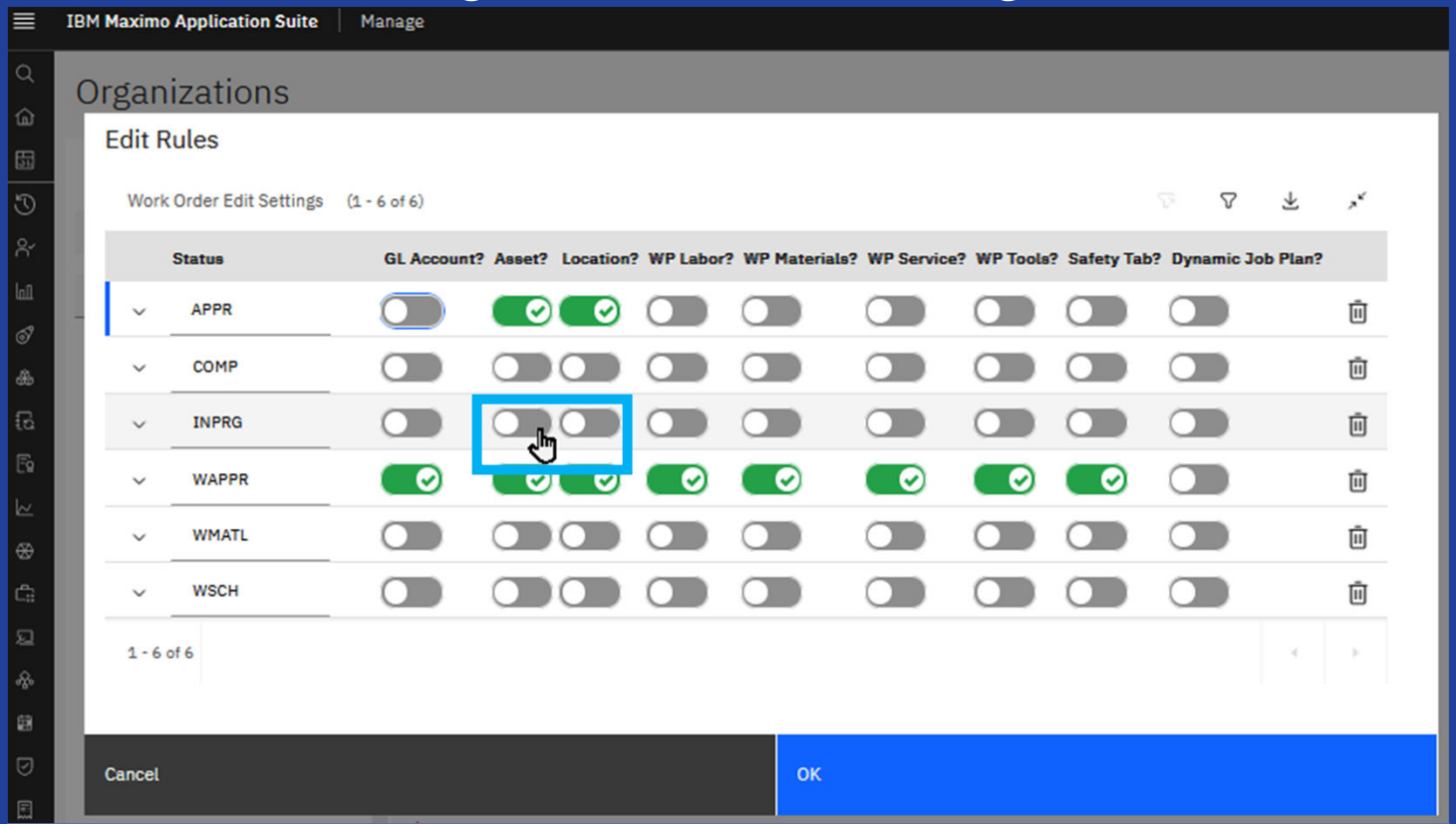




Projetech™
MAXIMO® CLOUD SOLUTIONS

# Maximo Edit Rules for consideration

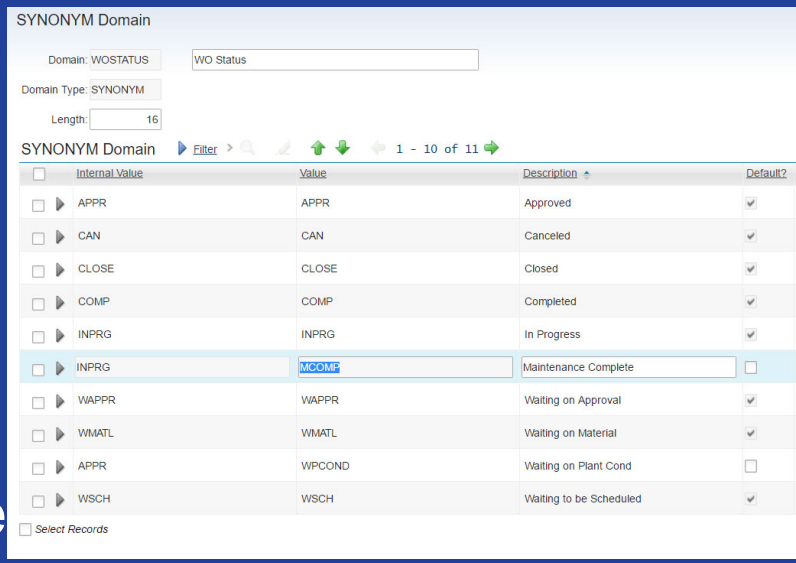
- Need to insert / update the asset number when work is at INPRG? Change the default settings




Projetech™
MAXIMO® CLOUD SOLUTIONS

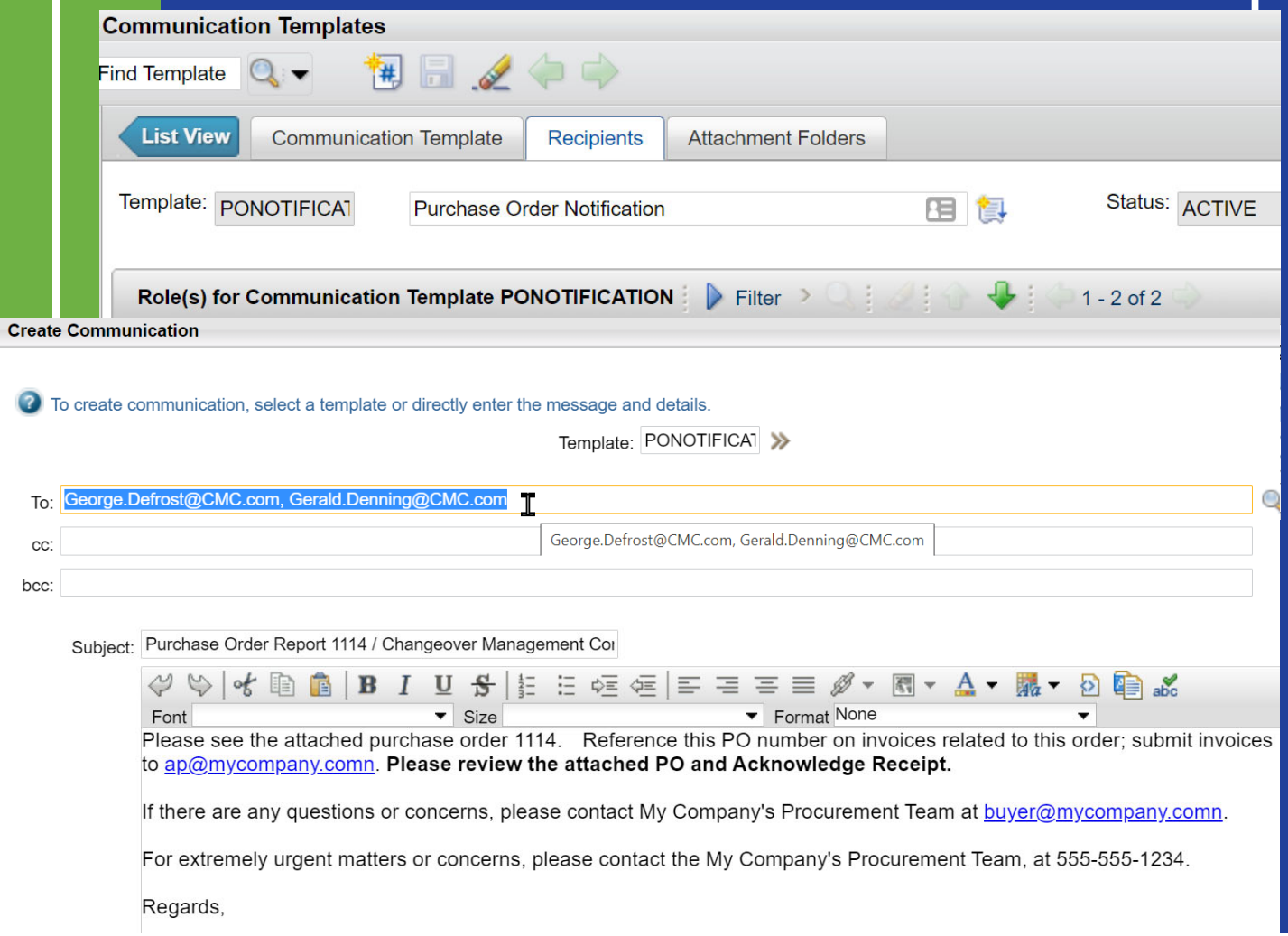
# Domains – many delivered, but you can add as too

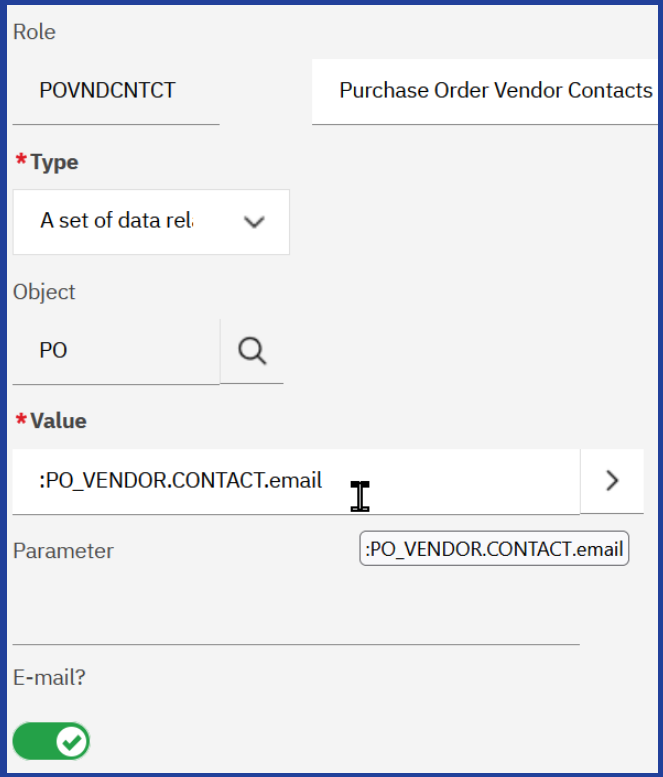
- Over 400 in v7.6.x; Over 550 in v8
- Example of a synonym domain to edit
  - MCOMP (FCOMP, etc.) synonym of INPRG
- Priority Fields have no delivered domains
  - Admin can add them
  - Populate with locally approved value
  - Attached to fields via db config
  - They stay attached through upgrade




Projetech™
MAXIMO® CLOUD SOLUTIONS

# Roles & Communication Templates

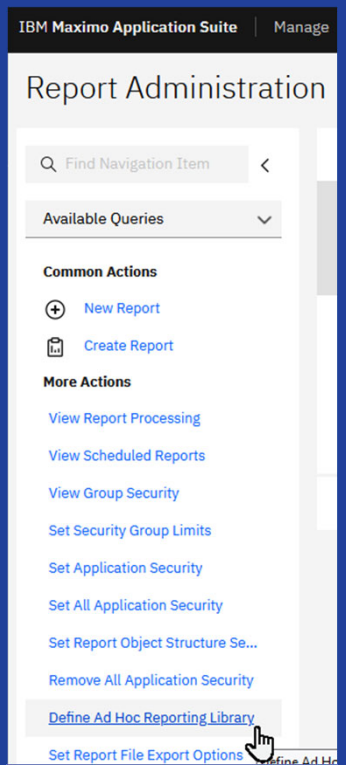


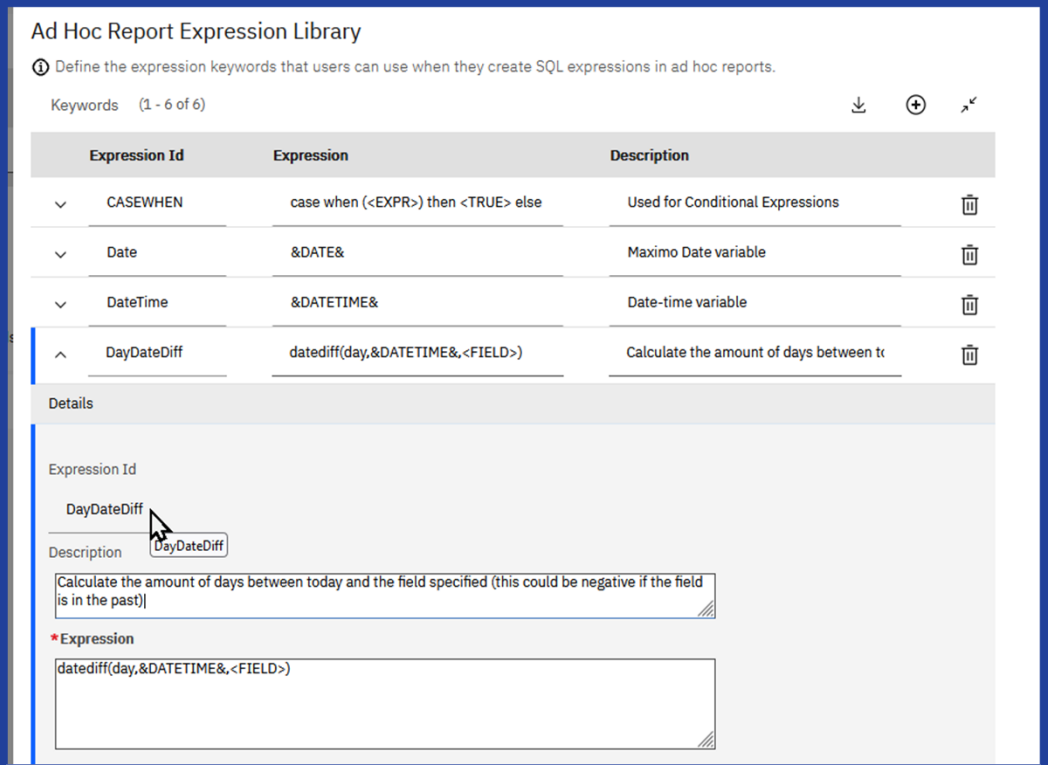




Projetech™
MAXIMO® CLOUD SOLUTIONS

# 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




Projetech™
MAXIMO® CLOUD SOLUTIONS

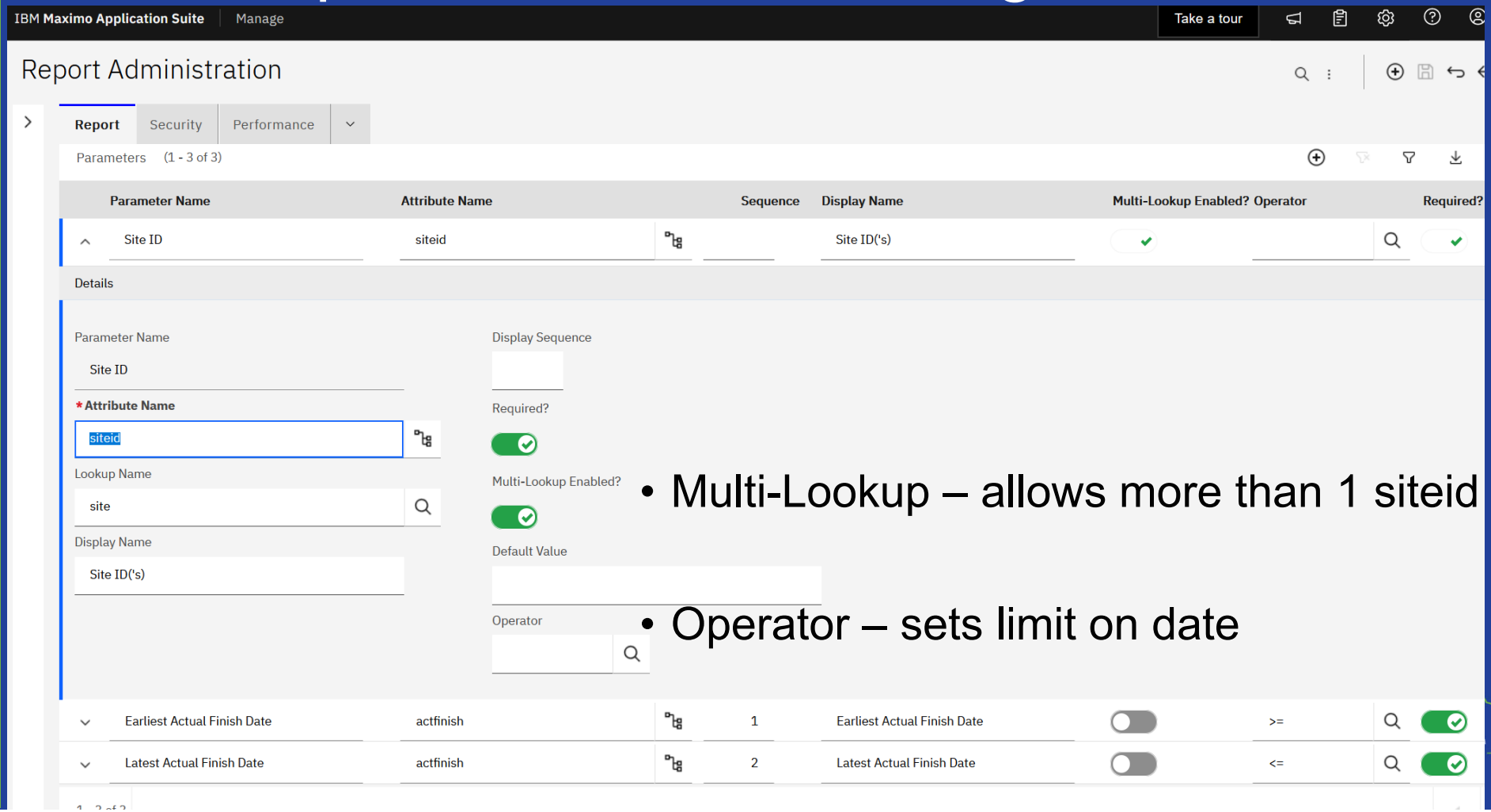
# Query Based Reporting – Runtime Paramaters

How is this done?

- Create and Save QBR
- In Report Administration, add Parameters
- 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 (>= for Earliest / <= 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

Projetech™
MAXIMO® CLOUD SOLUTIONS

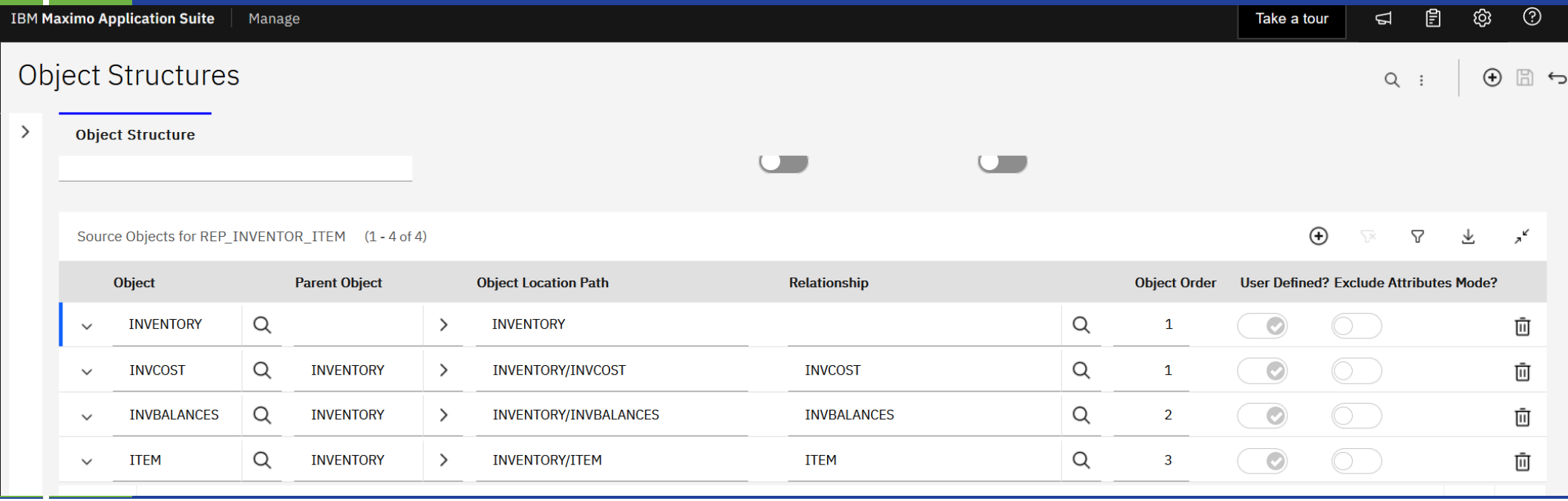
# QBR Report Administration Page




- Multi-Lookup – allows more than 1 siteid
- Operator – sets limit on date

# Integration Module: Object Structures

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



# 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 respparty 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)

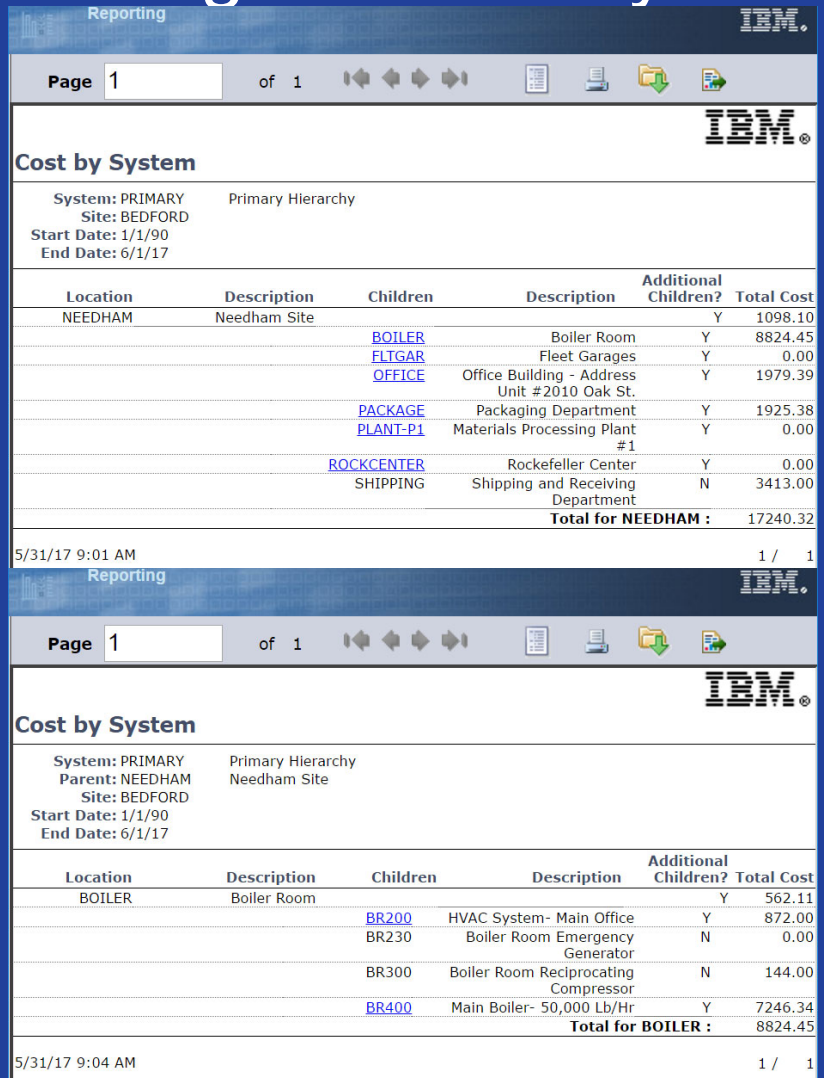
Projetech™
MAXIMO® CLOUD SOLUTIONS

# Locations, Assets and Primary System Hierarchy

- Build Primary System First
- Build Location Hierarchy for Primary System
- Each Asset should be assigned to a location
- Each Work Order should be assigned an asset whenever possible
  - Builds Better history
  - Supports gathering Total Cost of Ownership
  - Opportunity to associate spare parts automatically

Projetech™
MAXIMO® CLOUD SOLUTIONS

# Drilling down into your costs



Reporting

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 |
| | | BOILER | Boiler Room | Y | 8824.45 |
| | | FLTGAR | Fleet Garages | Y | 0.00 |
| | | OFFICE | Office Building - Address Unit #2010 Oak St. | Y | 1979.39 |
| | | PACKAGE | Packaging Department | Y | 1925.38 |
| | | PLANT-P1 | Materials Processing Plant #1 | Y | 0.00 |
| | | ROCKCENTER | Rockefeller Center | Y | 0.00 |
| | | SHIPPING | Shipping and Receiving Department | N | 3413.00 |
| | | | **Total for NEEDHAM :** | | 17240.32 |

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

Reporting

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 |
| | | BR200 | HVAC System- Main Office | Y | 872.00 |
| | | BR230 | Boiler Room Emergency Generator | N | 0.00 |
| | | BR300 | Boiler Room Reciprocating Compressor | N | 144.00 |
| | | BR400 | Main Boiler- 50,000 Lb/Hr | Y | 7246.34 |
| | | | **Total for BOILER :** | | 8824.45 |

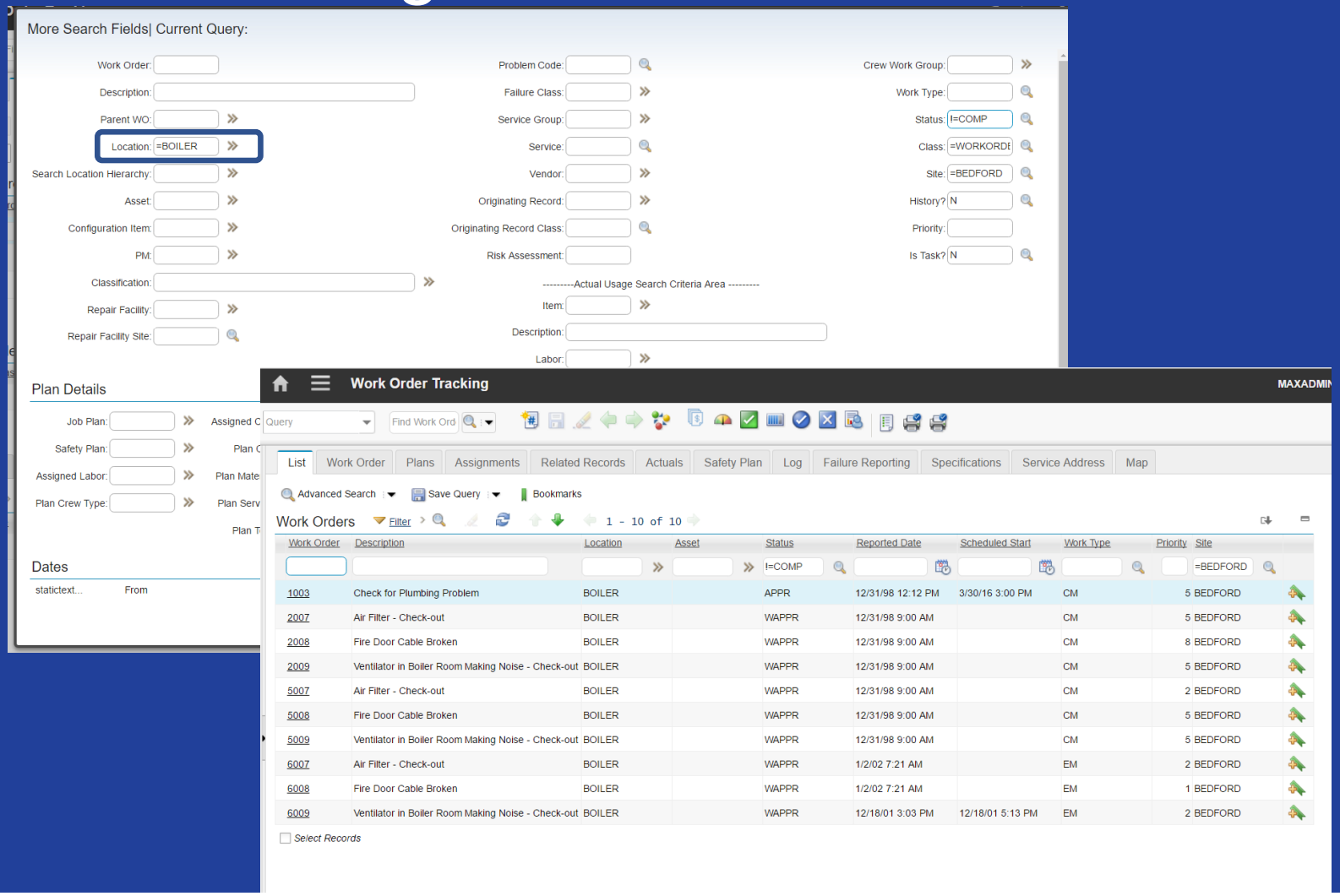
5/31/17 9:04 AM 1 / 1

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

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

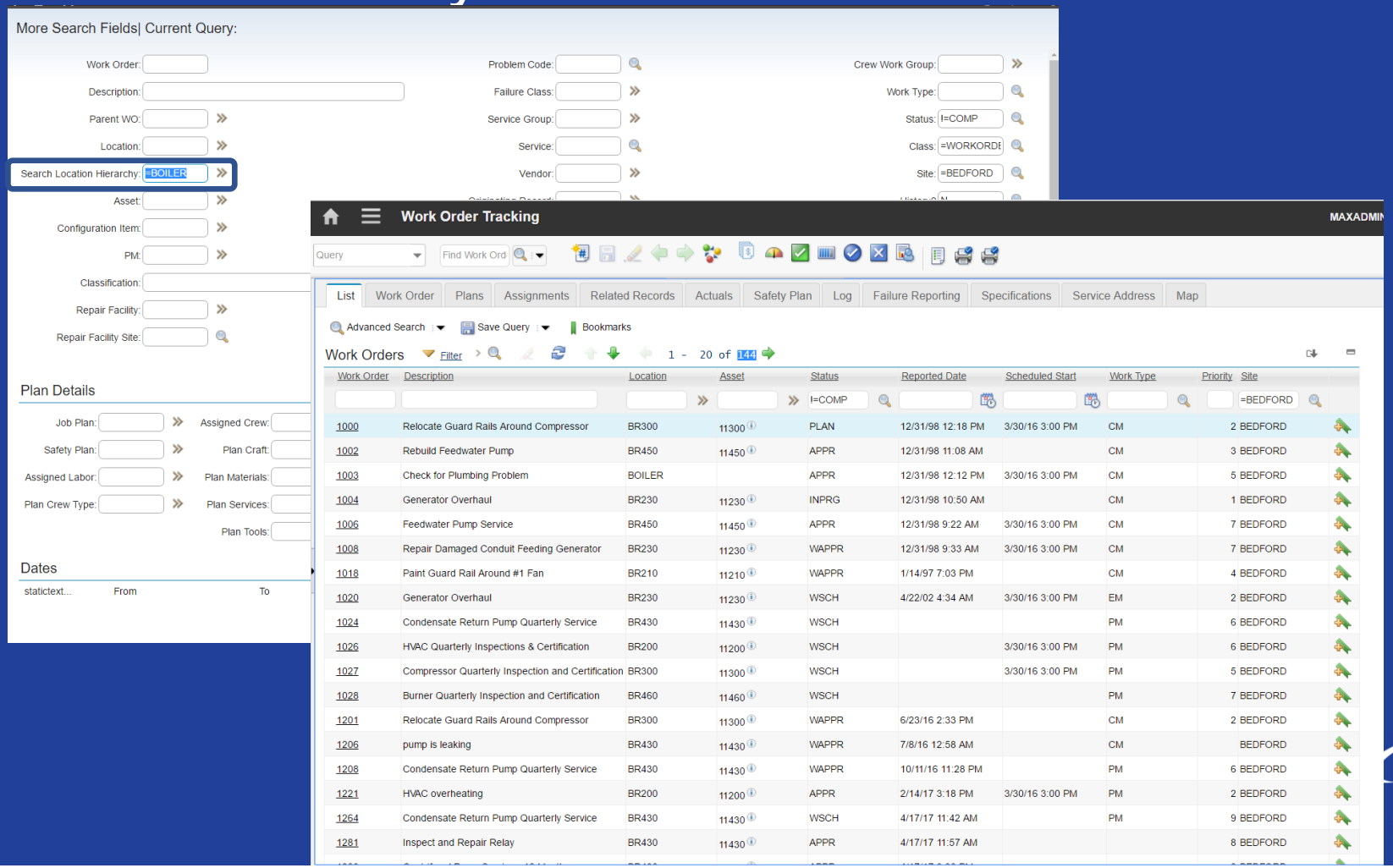
Projetech™
MAXIMO® CLOUD SOLUTIONS

# Backlog of Work On BOILER




Projetech™
MAXIMO® CLOUD SOLUTIONS

# Backlog of Work on BOILER Hierarchy




| Work Order | Description | Location | Asset | Status | Reported Date | Scheduled Start | Work Type | Priority | Site |
|---|---|---|---|---|---|---|---|---|---|
| | | | | !=COMP | | | | | =BEDFORD |
| 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 |

Projetech™
MAXIMO® CLOUD SOLUTIONS

## Honorable Mentions

### Cron Tasks

- KPICronTask – generates data point

### System Properties

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

### PM Help to Bookmark

https://tinyurl.com/MaximoPMHelp

(https://www.ibm.com/docs/en/mam/7.6.1.2?topic=application-sequences-pm-job-plans)

DEMONSTRATION

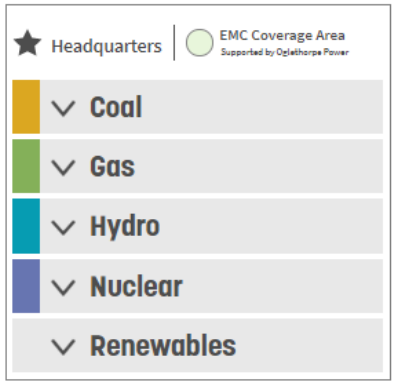
Projetech™ MAXIMO® CLOUD SOLUTIONS

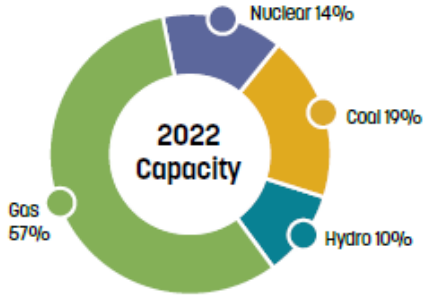
OglethorpePower

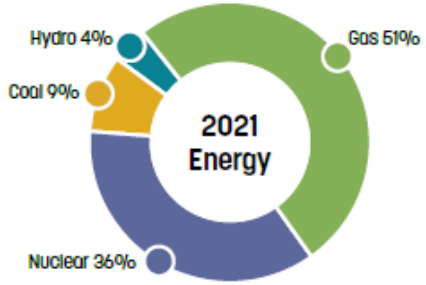
# Oglethorpe Power Corporation E-Sourcing Initiative

# 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

OglethorpePower

* Workflow-Enabled **Add-On Product *** In Progress

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

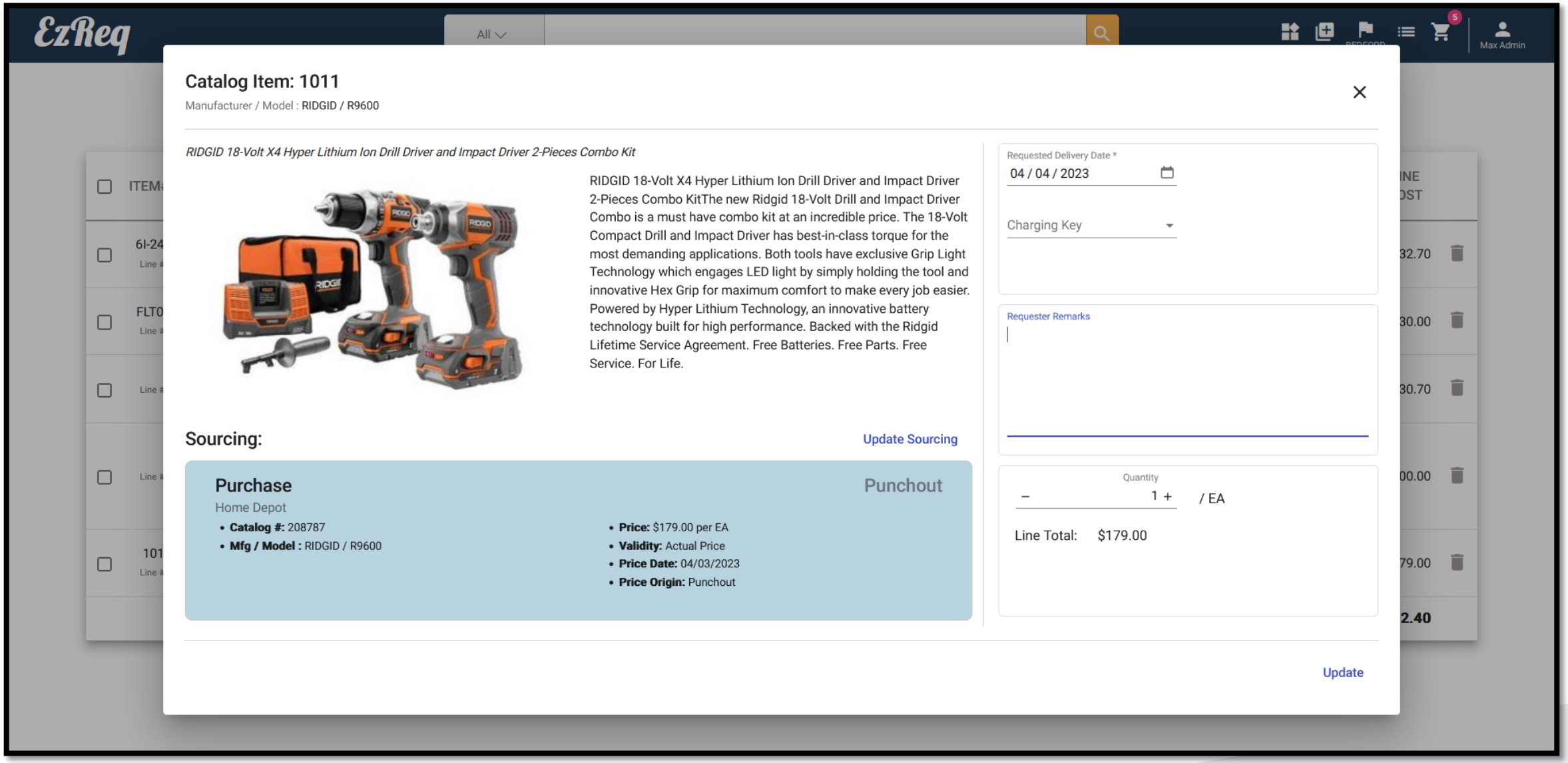
# P2Insight
# Maximo E-Commerce Enabler

- **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



# Why P2Insight's Order Hub?

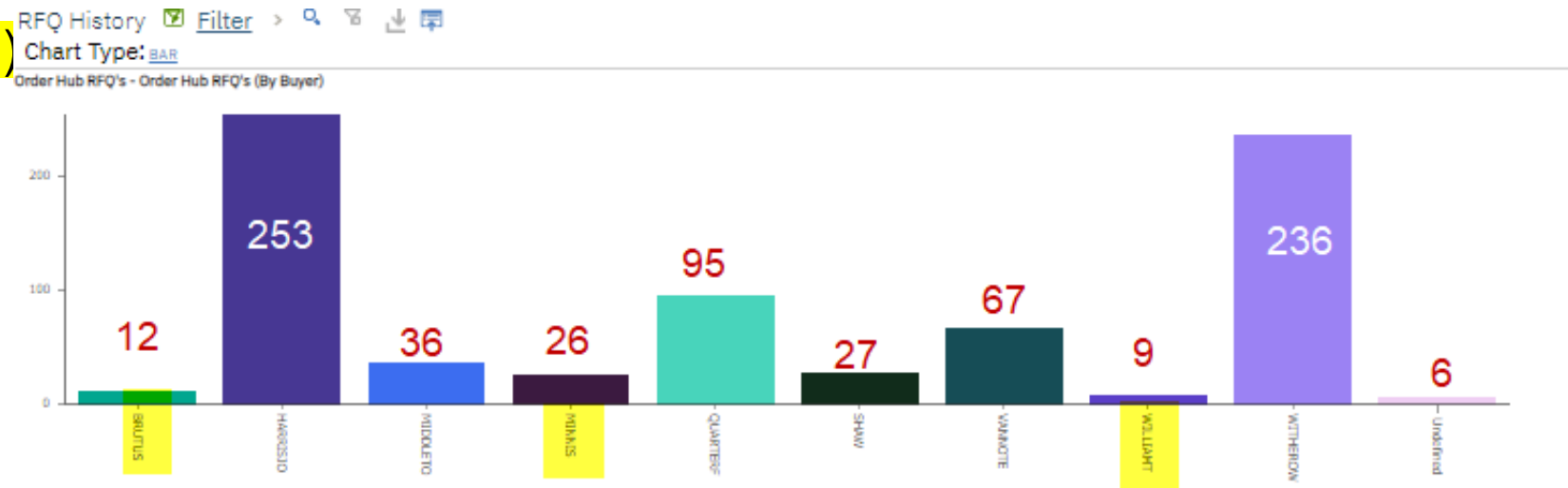
- Solution configurable to OPC's needs.
  - Work Flow
  - PR Re-approvals after bids
- Solution utilizes the functionality in Maximo
- Allows for designation of sealed bids
- Provides varied bid analysis
- Buyers and contract agents never leave Maximo to create, to analyze and award a bid event.
- Allows 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 |

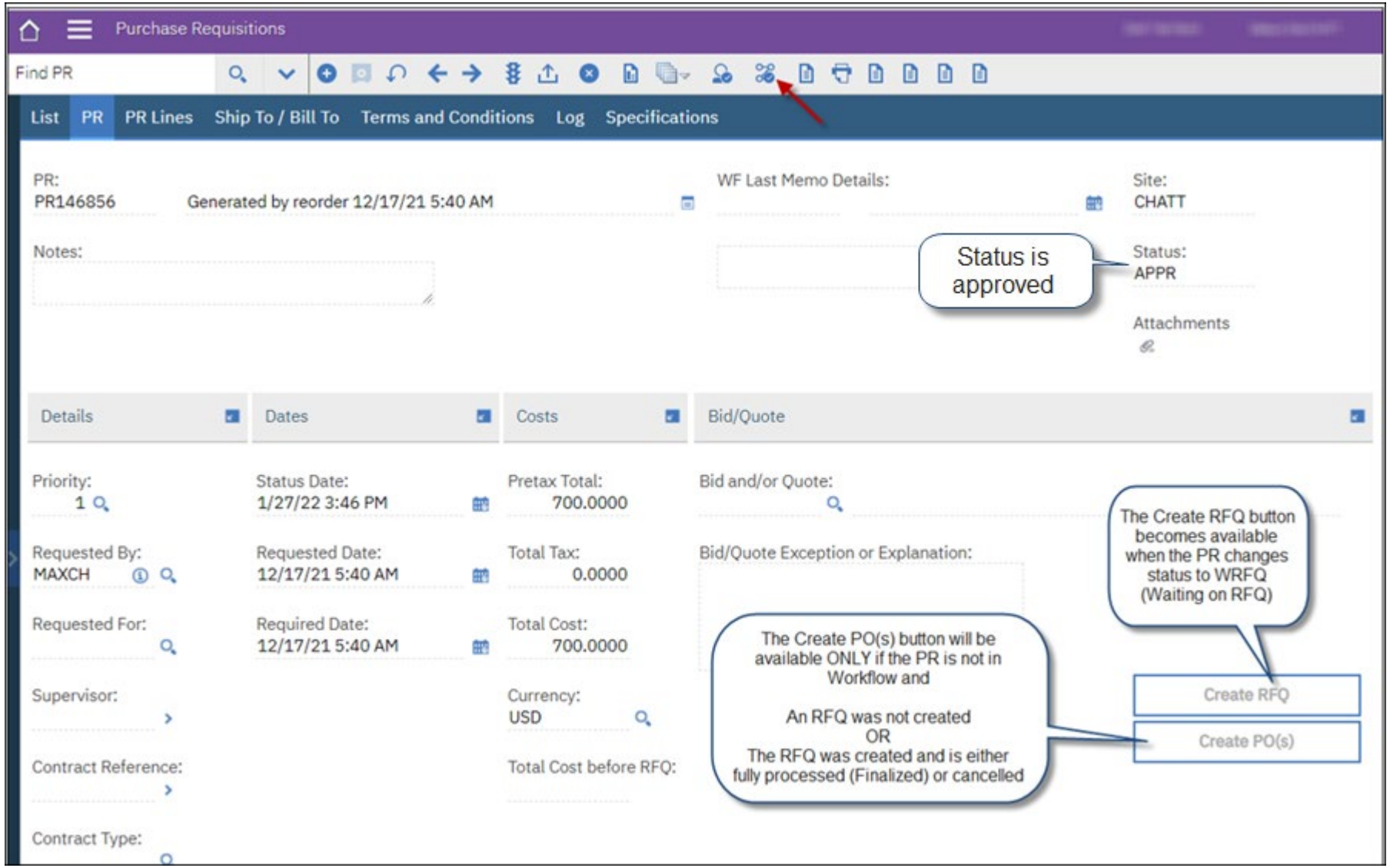
# Current Status (as of June 1, 2023)

- 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)



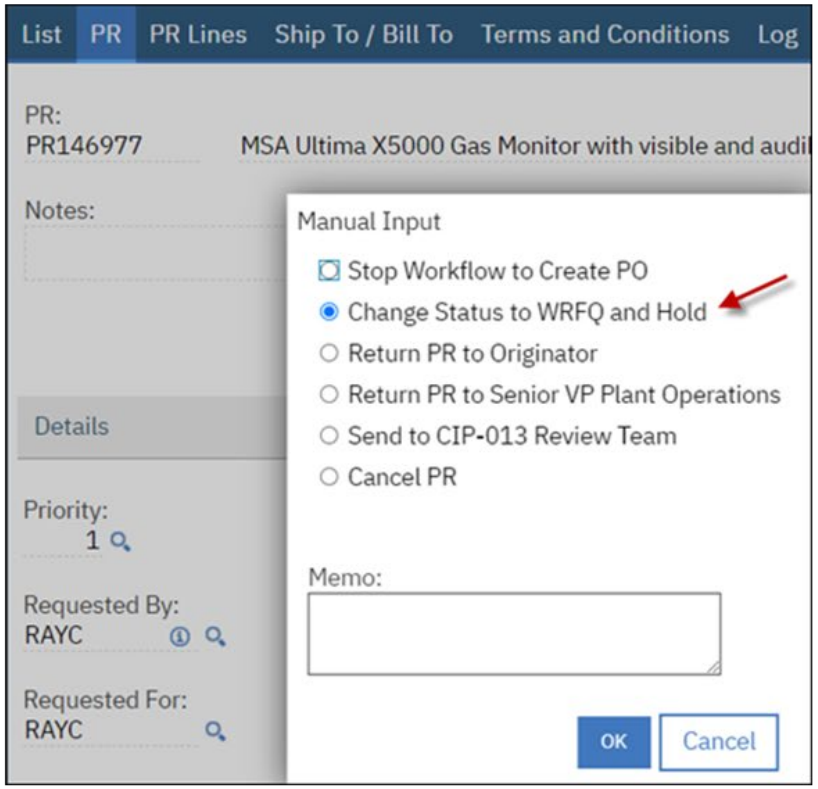
# RFQ
# Inventory Items
# & Direct Issue Materials

# Sample RFQ: Inventory Items/Materials

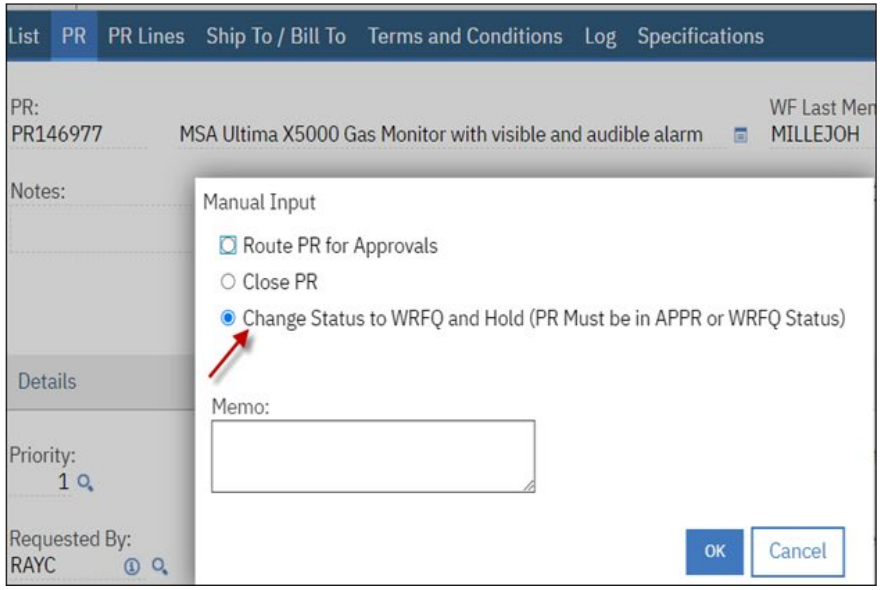


# Sample RFQ: Inventory Items/Materials

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

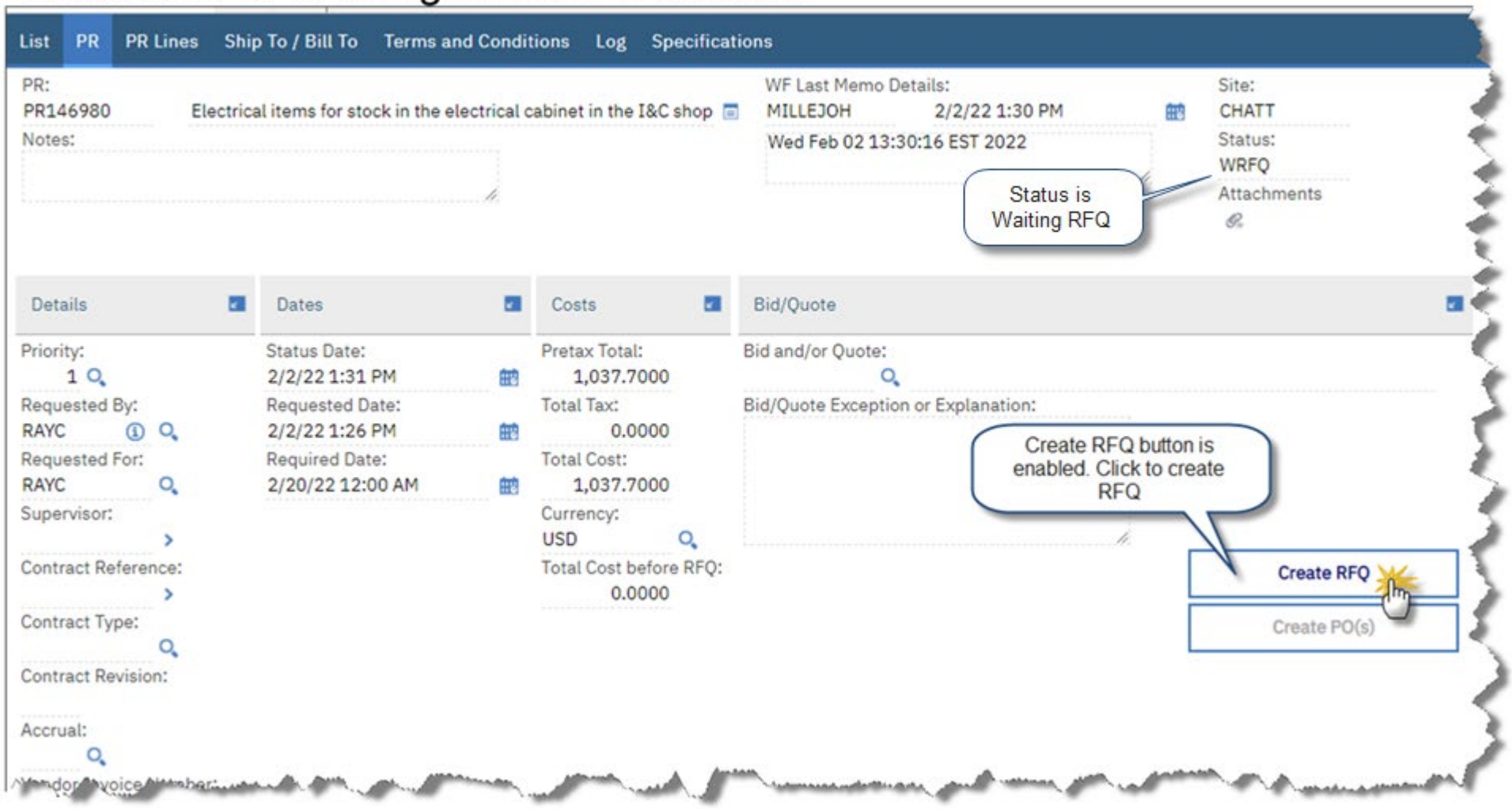



If the PR is approved or in WRFQ status and not in workflow, the buyer should workflow the record and select Change Status to WRFQ and Hold



# Sample RFQ: Inventory Items/Materials

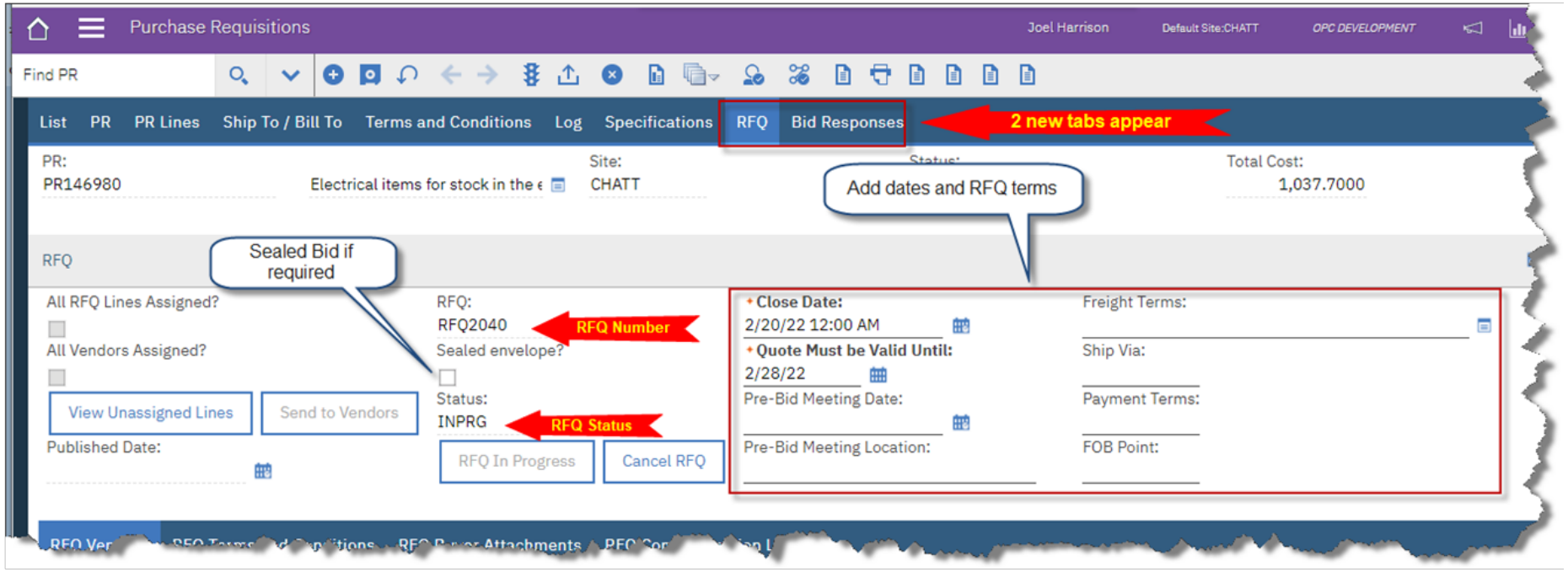
## Create the RFQ using Create RFQ button



# Sample RFQ: Inventory Items/Materials

Once the RFQ is created, the RFQ and Bid Response tabs are visible

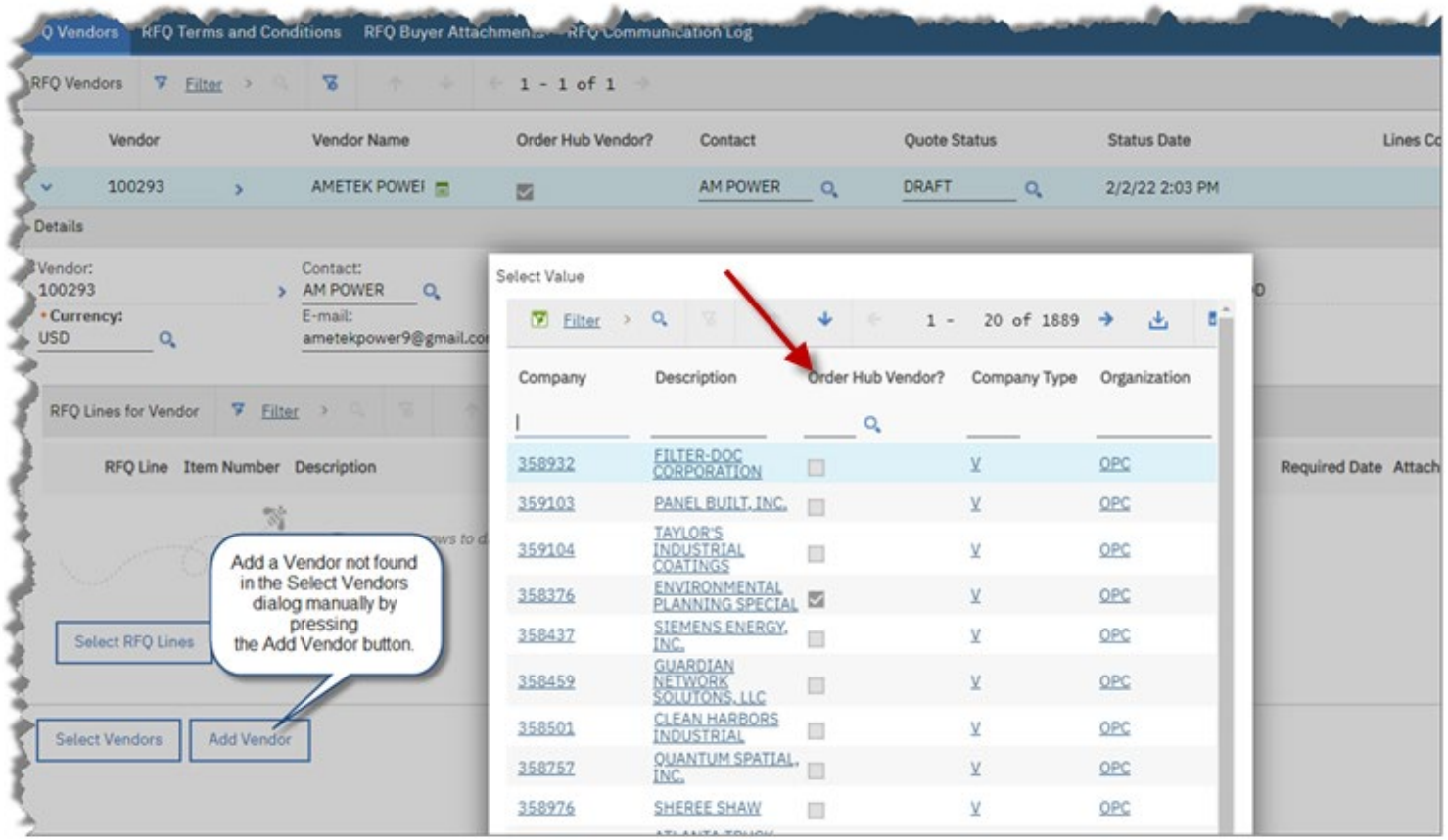
"Close Date" and "Quote Must be Valid Until" are required fields.




- 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

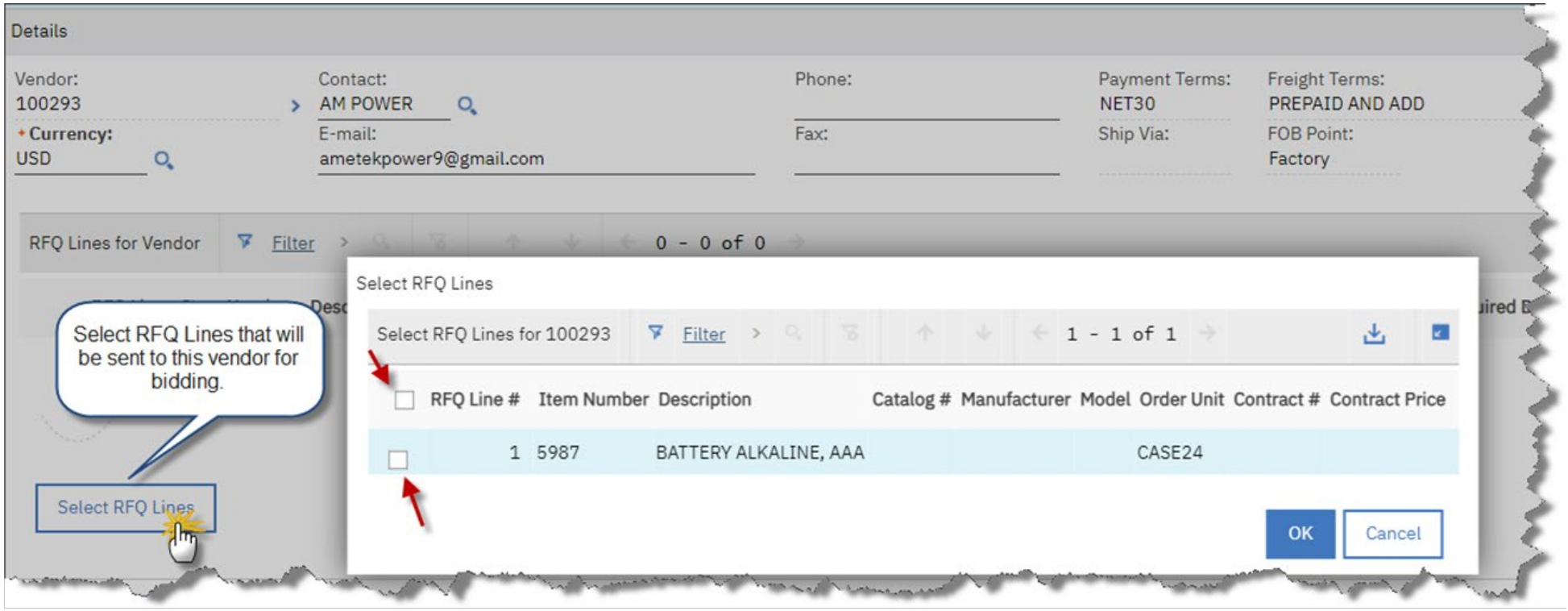
# Sample RFQ: Inventory Items/Materials

## Add vendors to RFQ – Add Vendor button




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

# Sample RFQ: Inventory Items/Materials

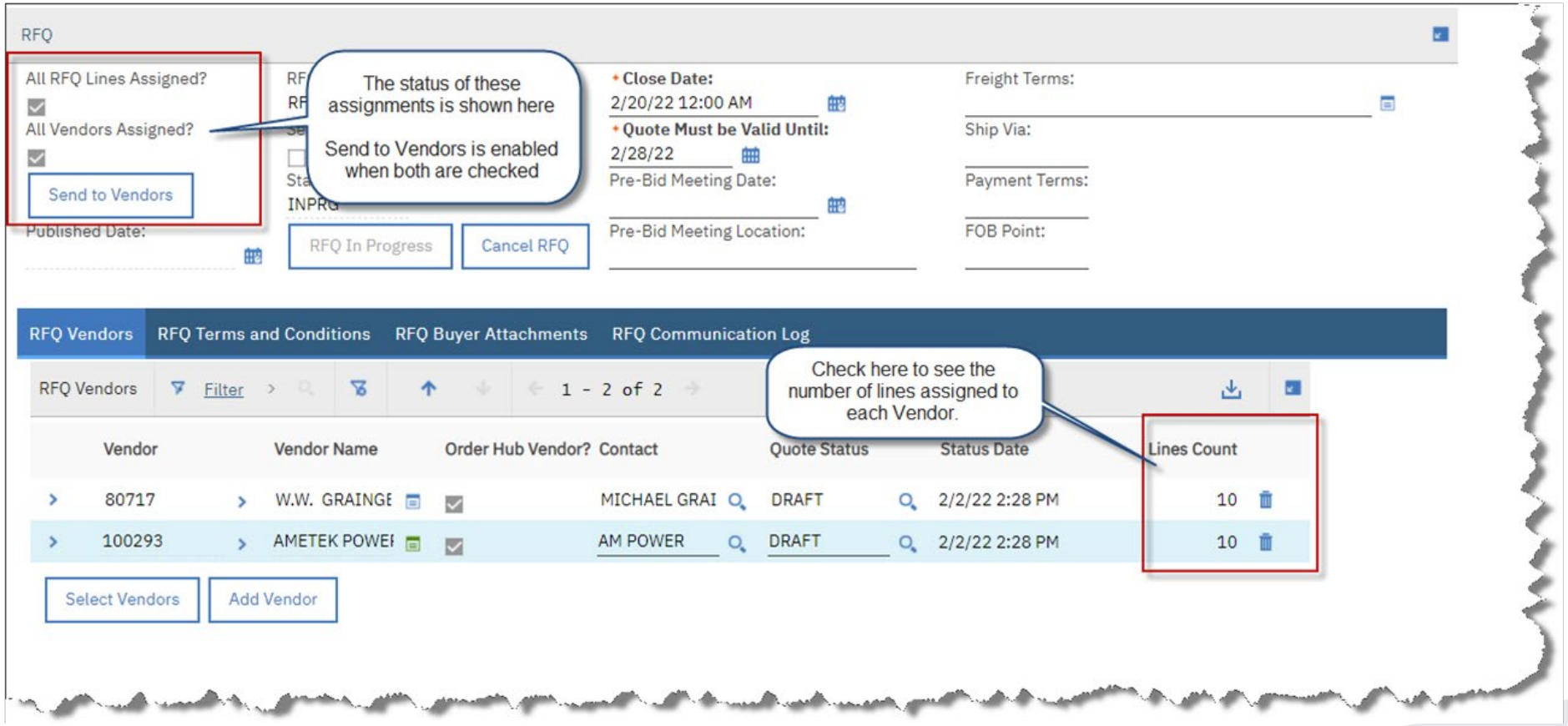



Continue to add vendors and lines as required

# Sample RFQ: Inventory Items/Materials

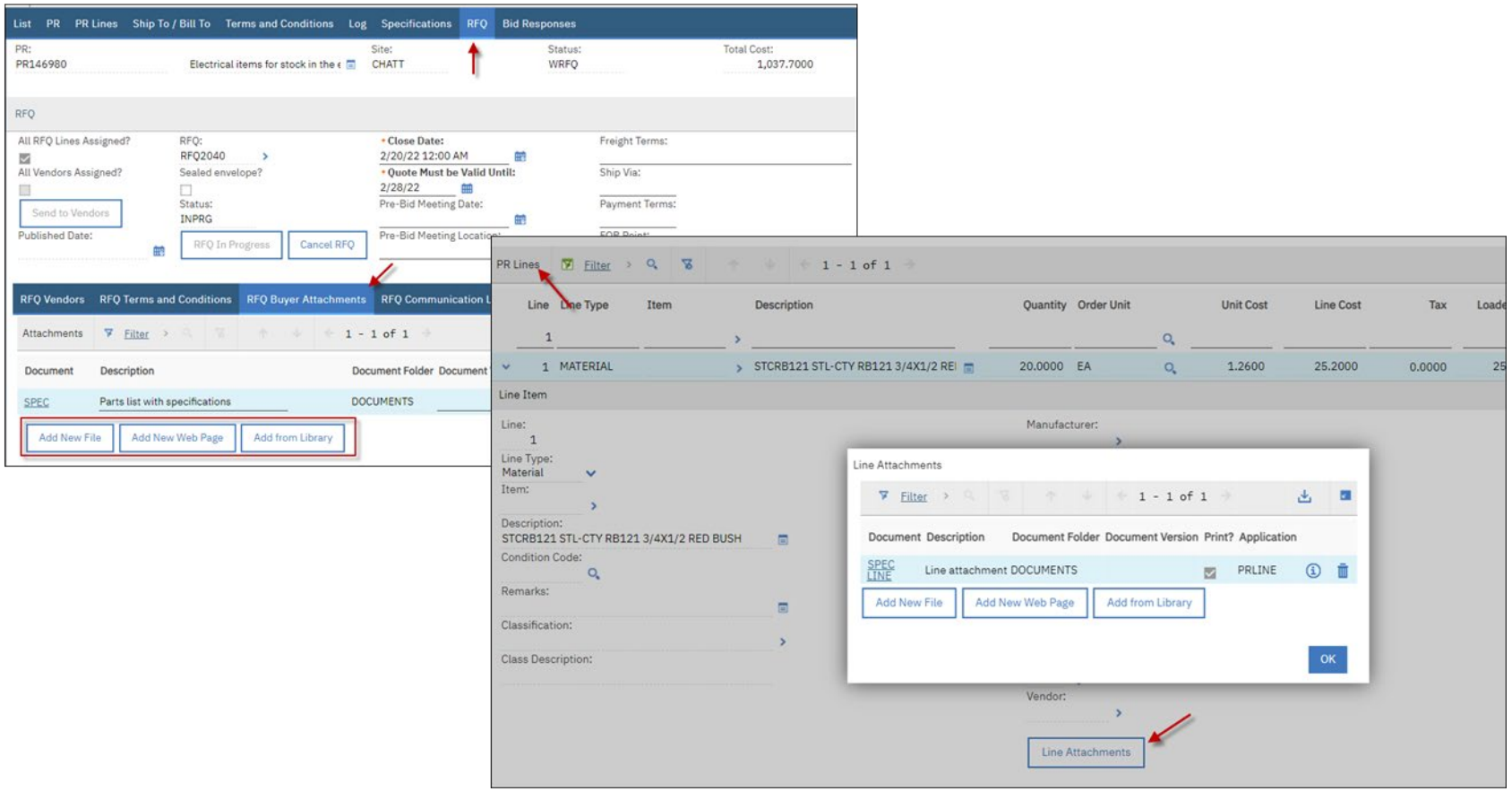
If any vendor(s) or items remain unassigned Maximo will not allow further processing.

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.



# Sample RFQ: Inventory Items/Materials

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

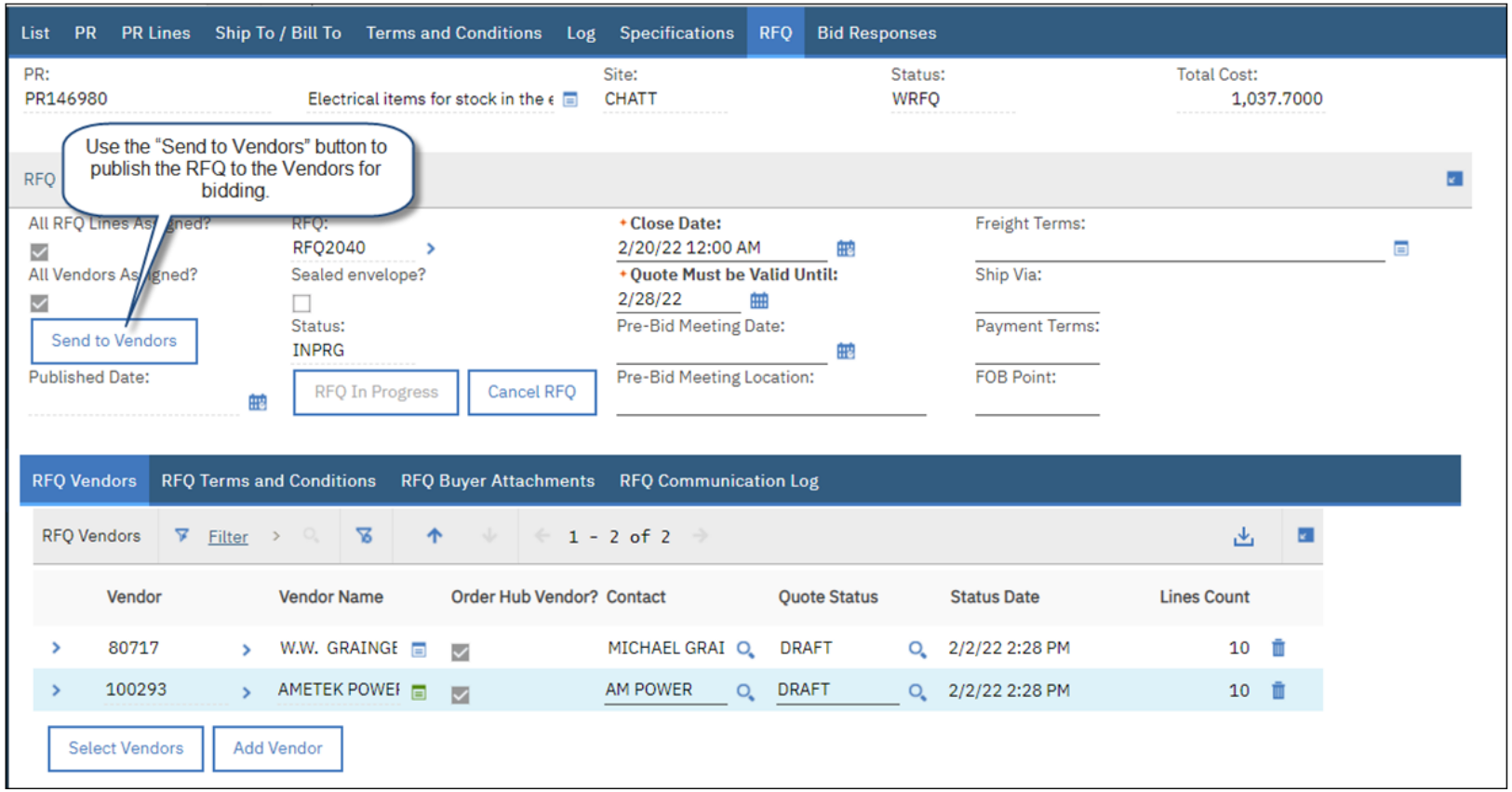



These attachments are sent to all vendors on the RFQ when the RFQ is sent to the vendors

# Sample RFQ: Inventory Items/Materials

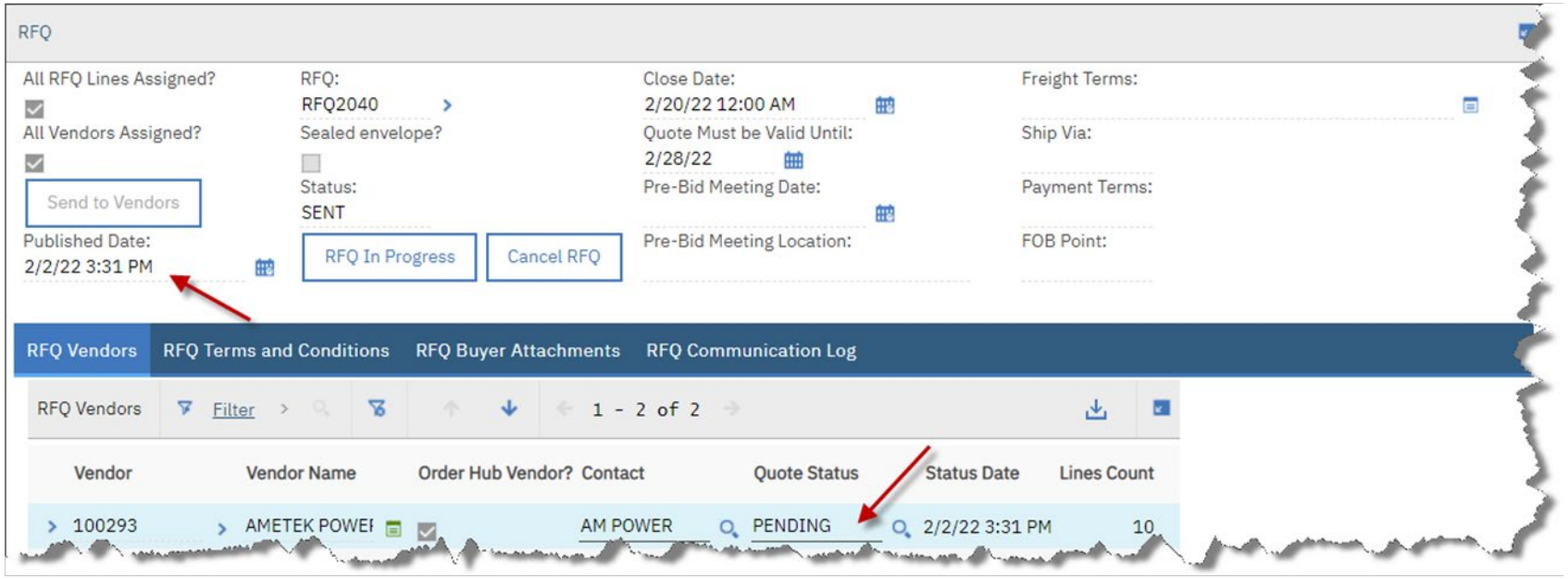
Publish RFQ for vendors to bid

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.



# Sample RFQ: Inventory Items/Materials

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

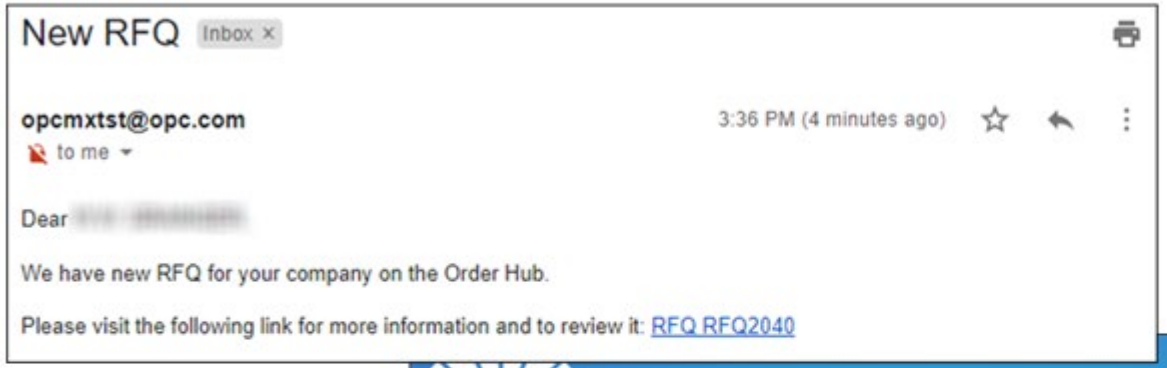


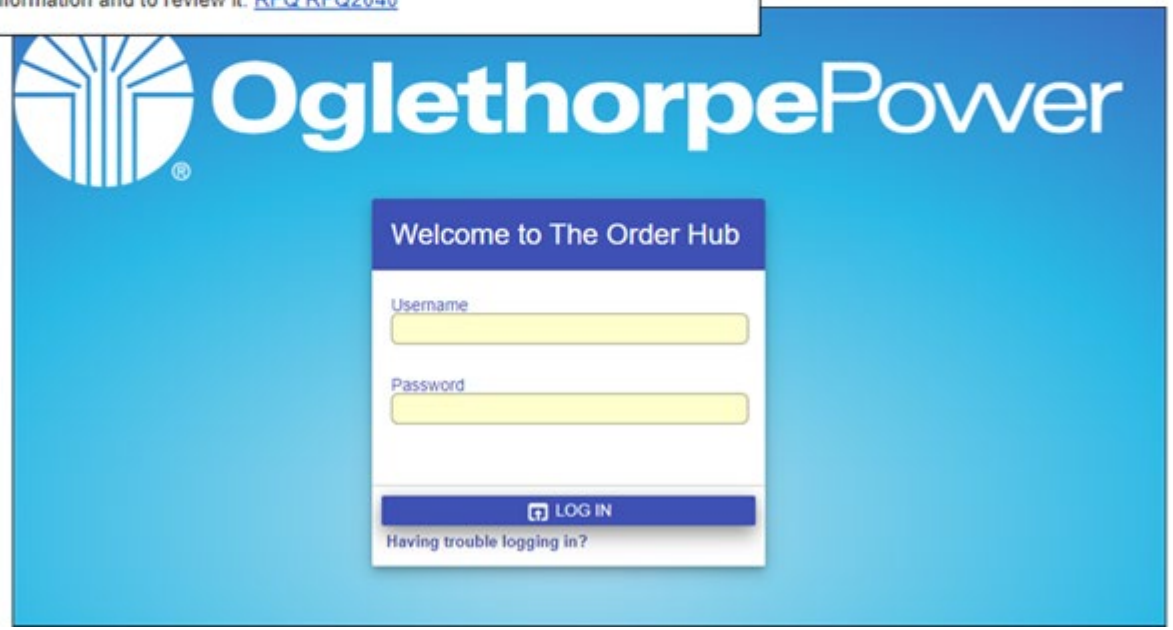

Quote status will change from DRAFT to PENDING for each vendor.

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

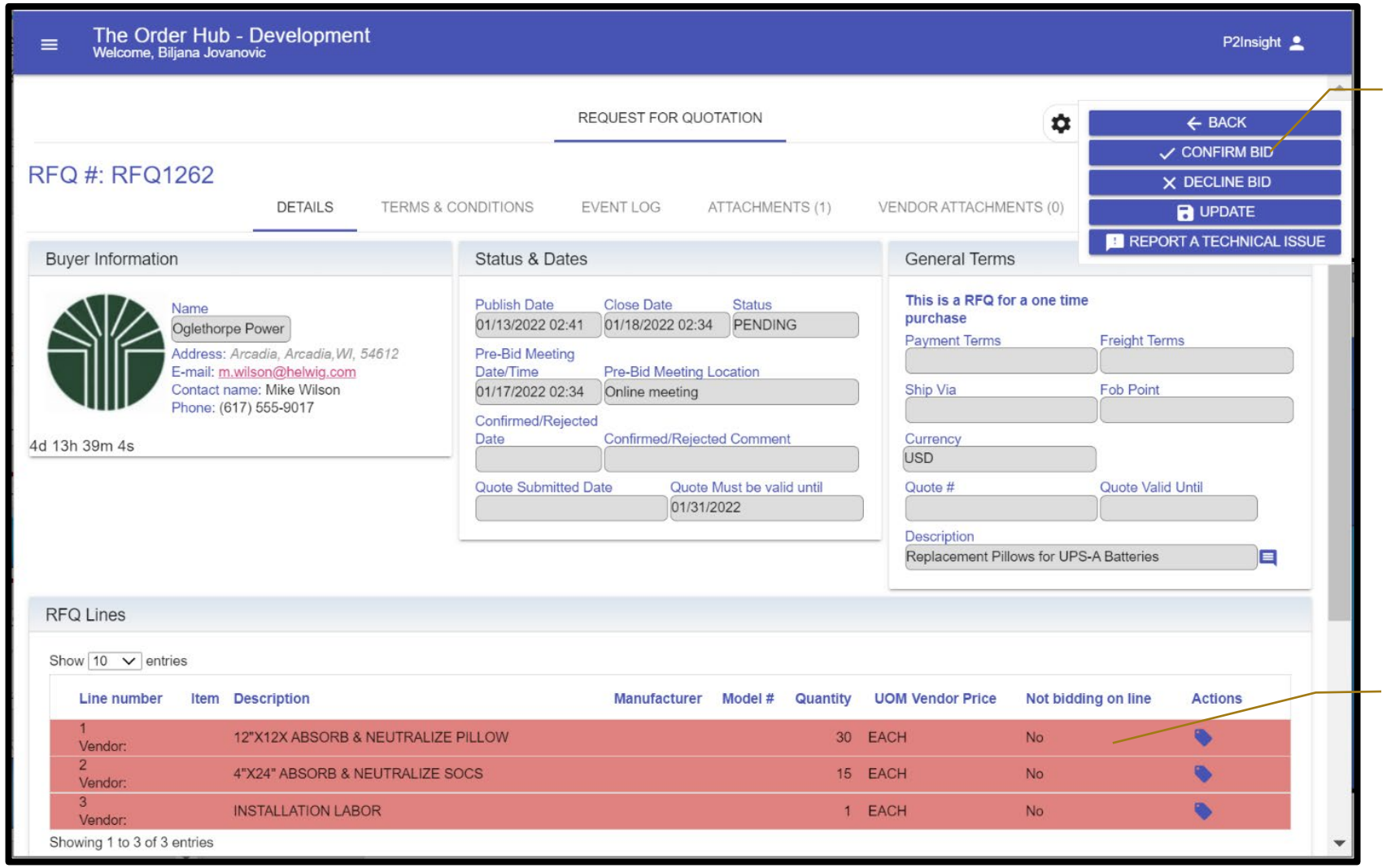
# Sample RFQ: Inventory Items/Materials

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…

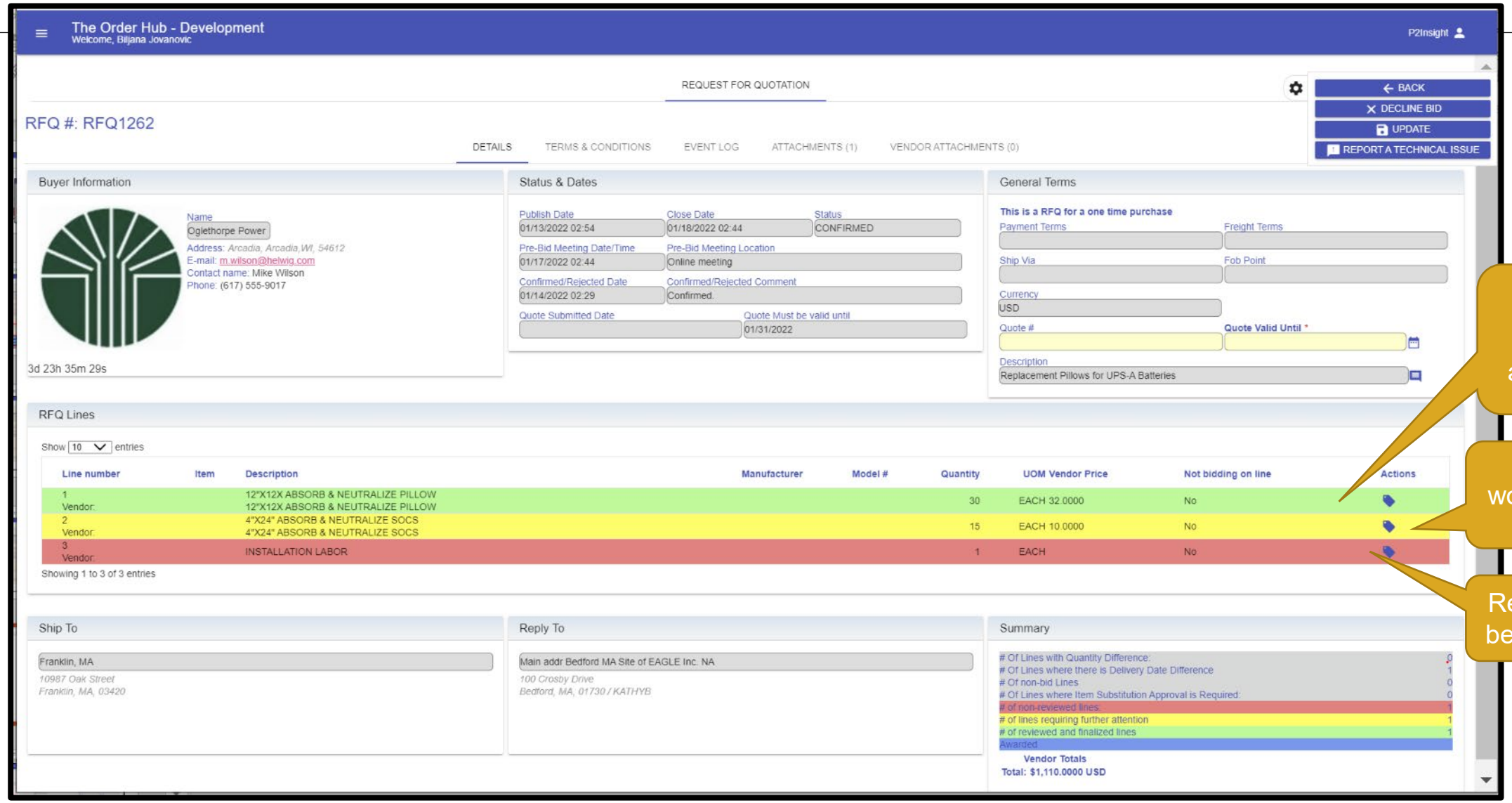



Review RFQ and confirm will Bid

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

© 2016-2022 P2INSIGHT Inc..

# Color Coded Lines help track progress of bid



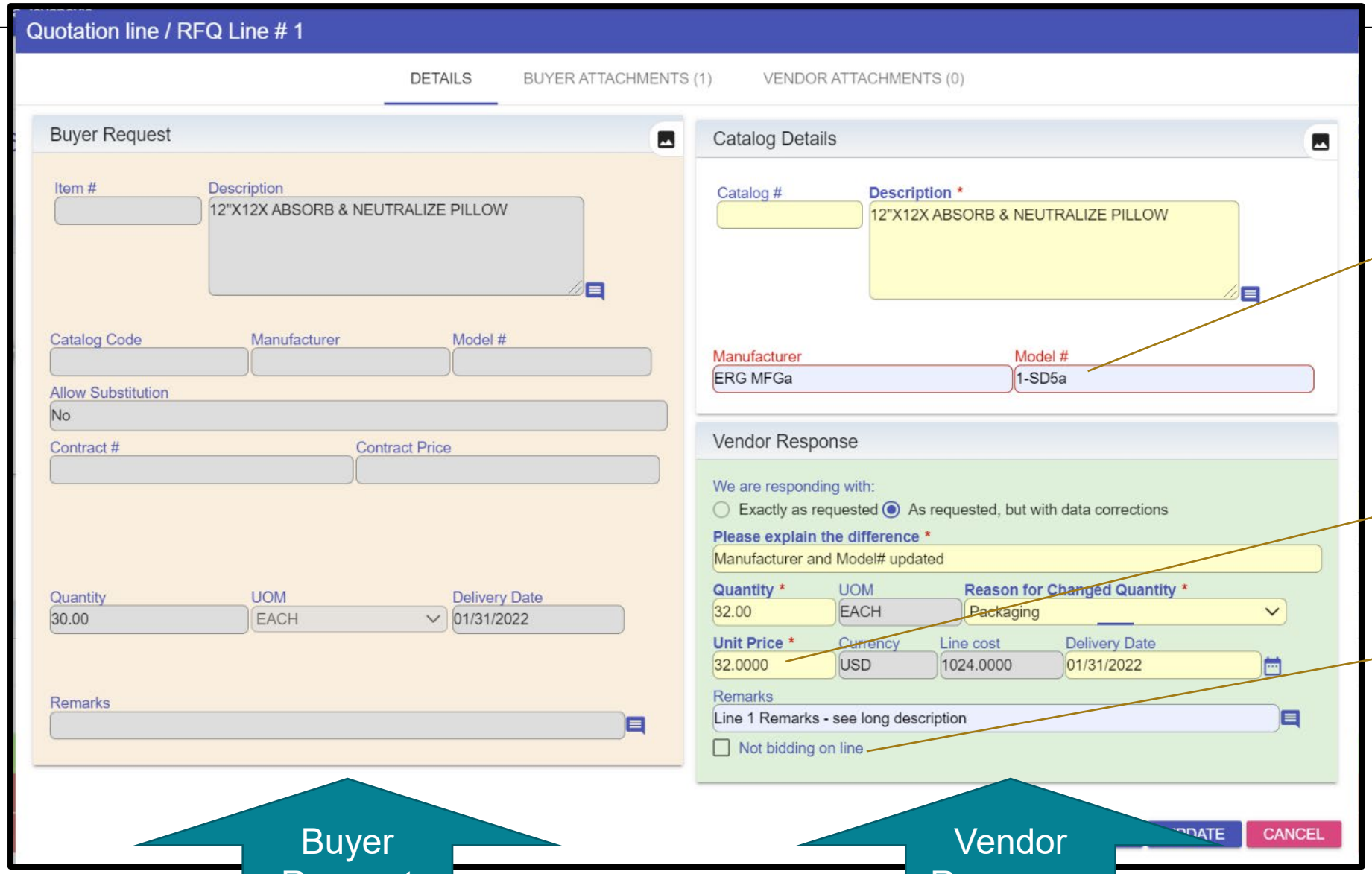

Green Lines have been reviewed and are ready to be submitted.

Yellow means work in progress – Internal Hold

Red line have not been updated yet!

© 2016-2022 P2INSIGHT Inc..

# Then for each line they enter Price and other details




Vendor can update any missing information

Vendor enter bid price

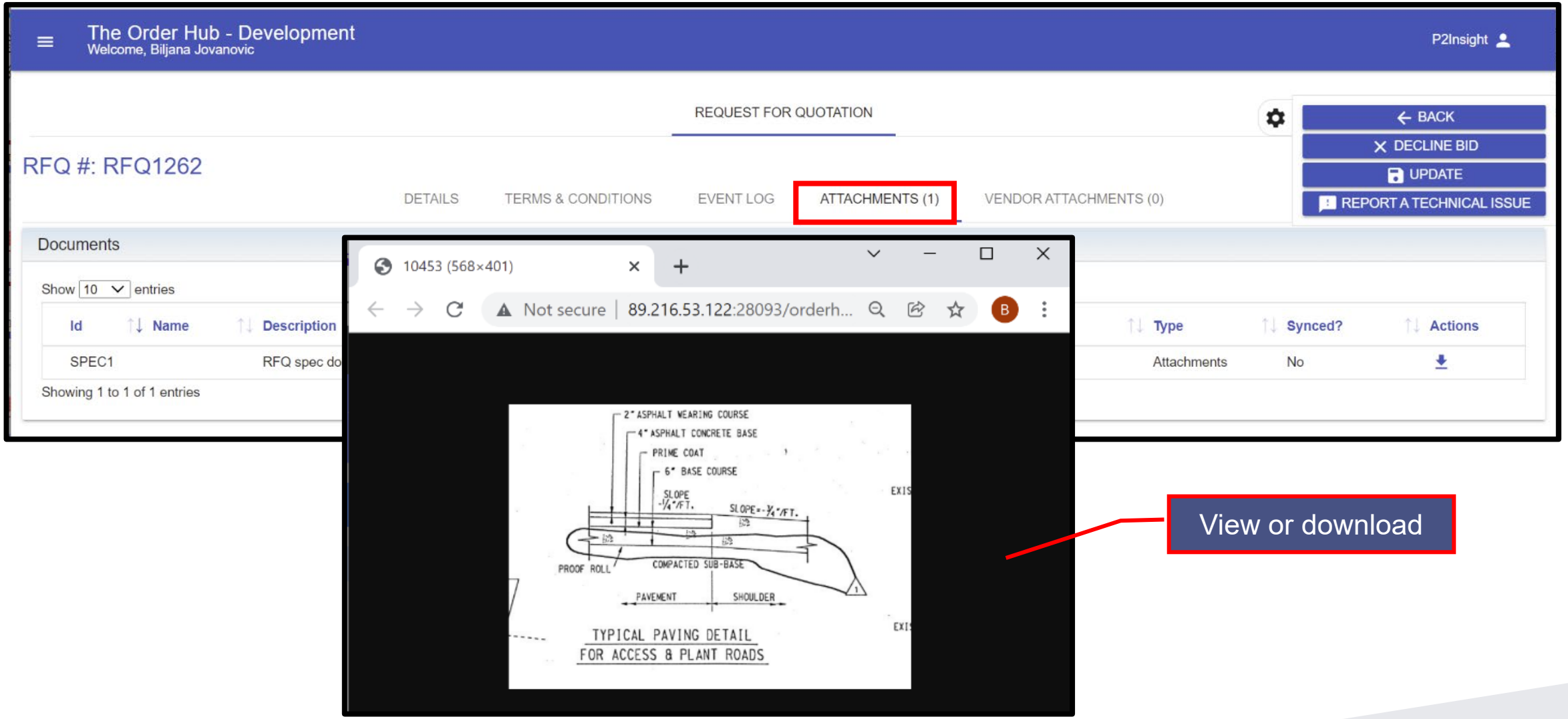
Vendor can chose NOT to bid on a line

Buyer Request

Vendor Response

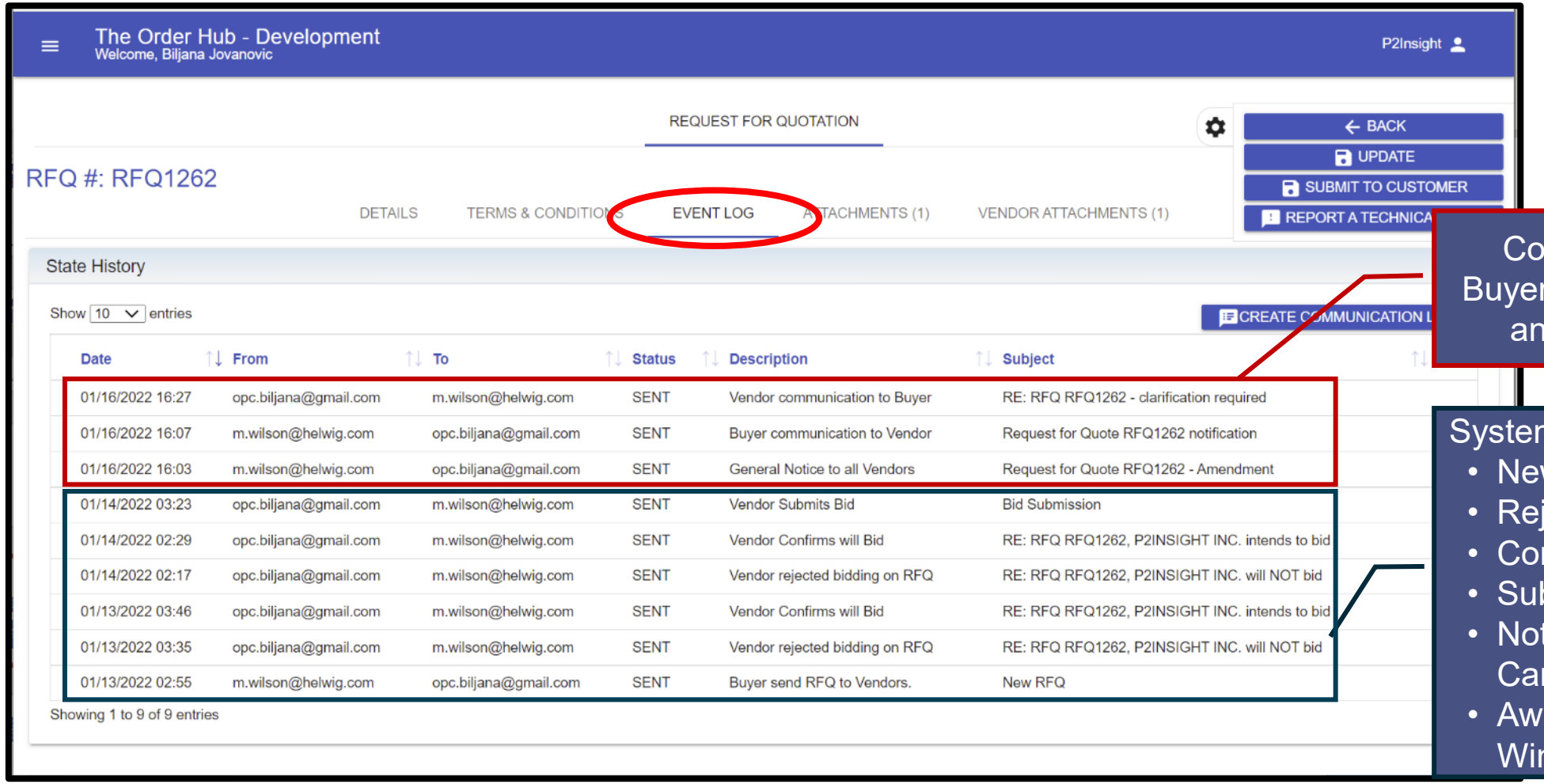
© 2016-2022 P2INSIGHT Inc.,
Confidential & Proprietary

# Attachments can be sent at RFQ or RFQ Line level




© 2016-2022 P2INSIGHT Inc..

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




Communication Log: Buyer's email notifications and your messages

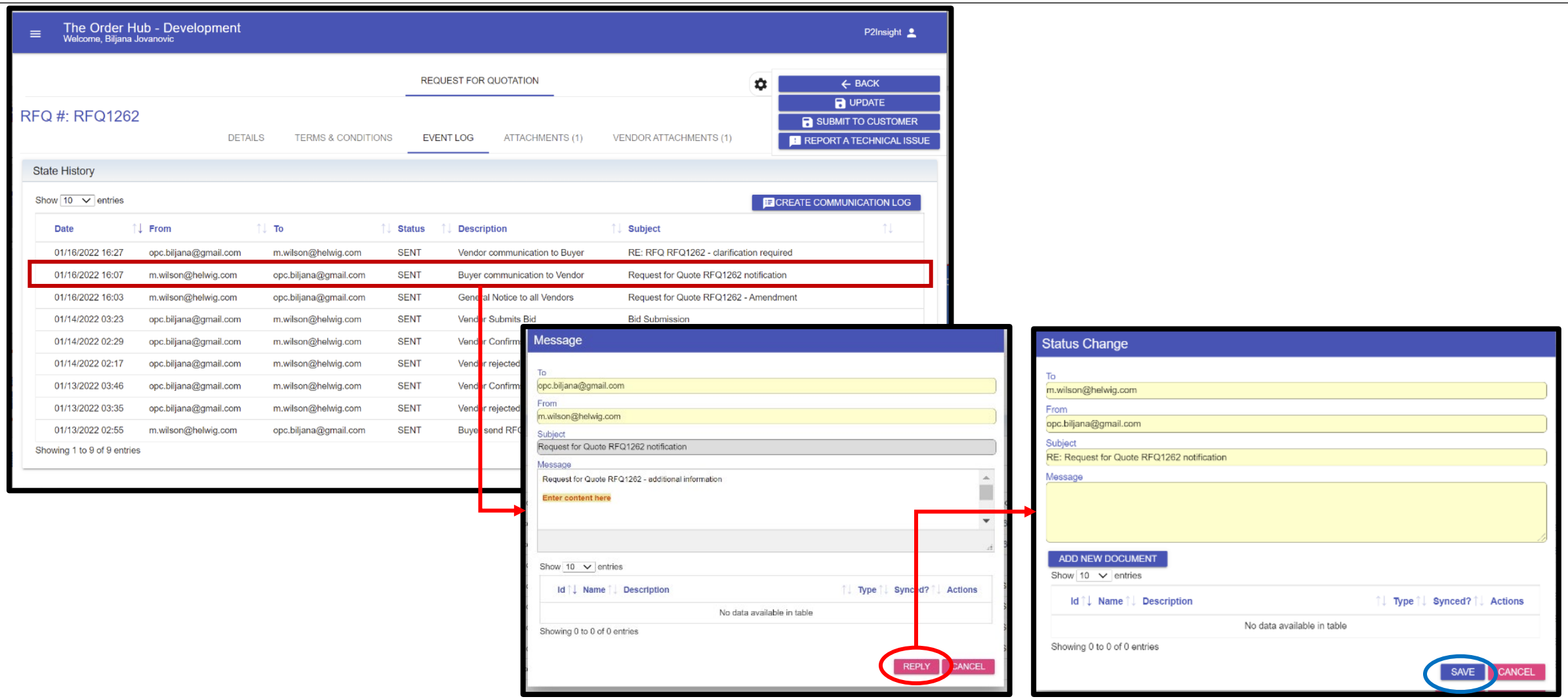
System logged events:

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

© 2016-2022 P2INSIGHT Inc..

Confidential & Proprietary

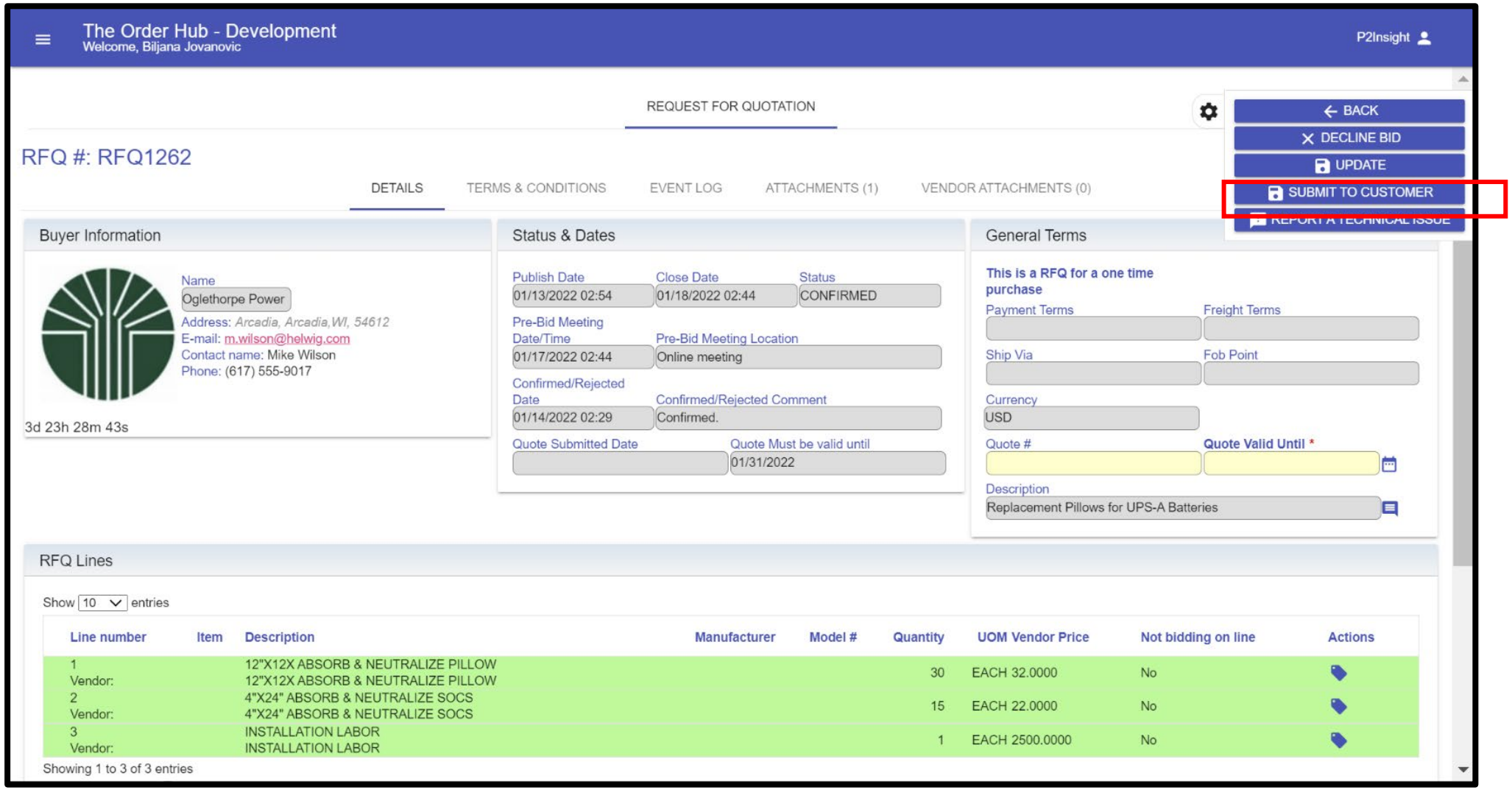
# Buyer can send notifications.
# Vendor can reply or ask for Clarification if appropriate or necessary.




© 2016-2022 P2INSIGHT Inc..

Confidential & Proprietary

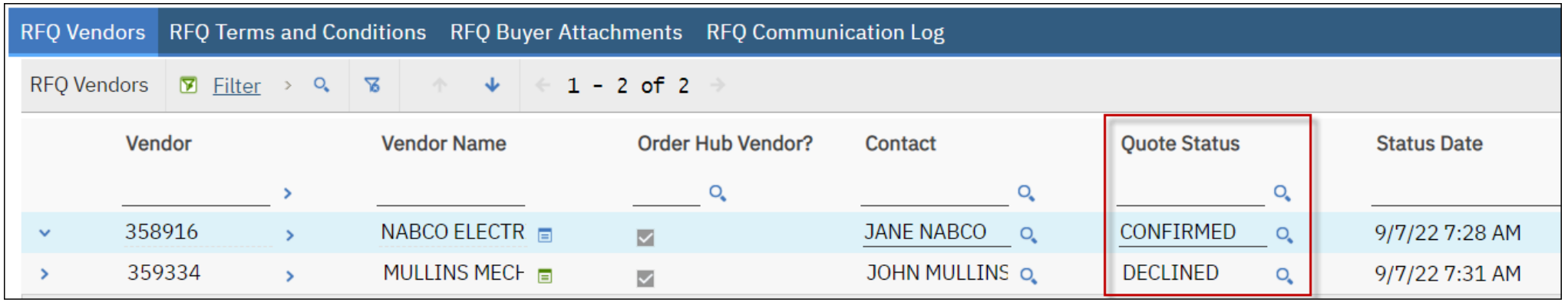
# When all line are priced, they turn green, and Vendor can submit the bid…



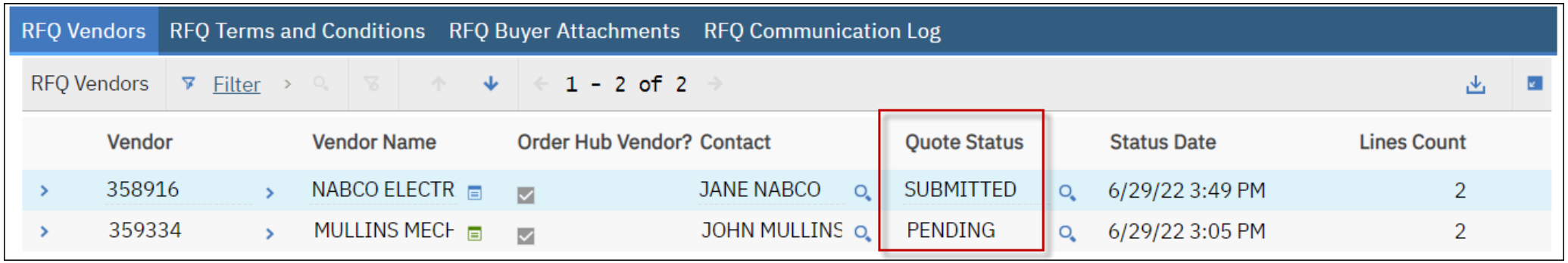

© 2016-2022 P2INSIGHT Inc..

# Sample RFQ: Inventory Items/Materials

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



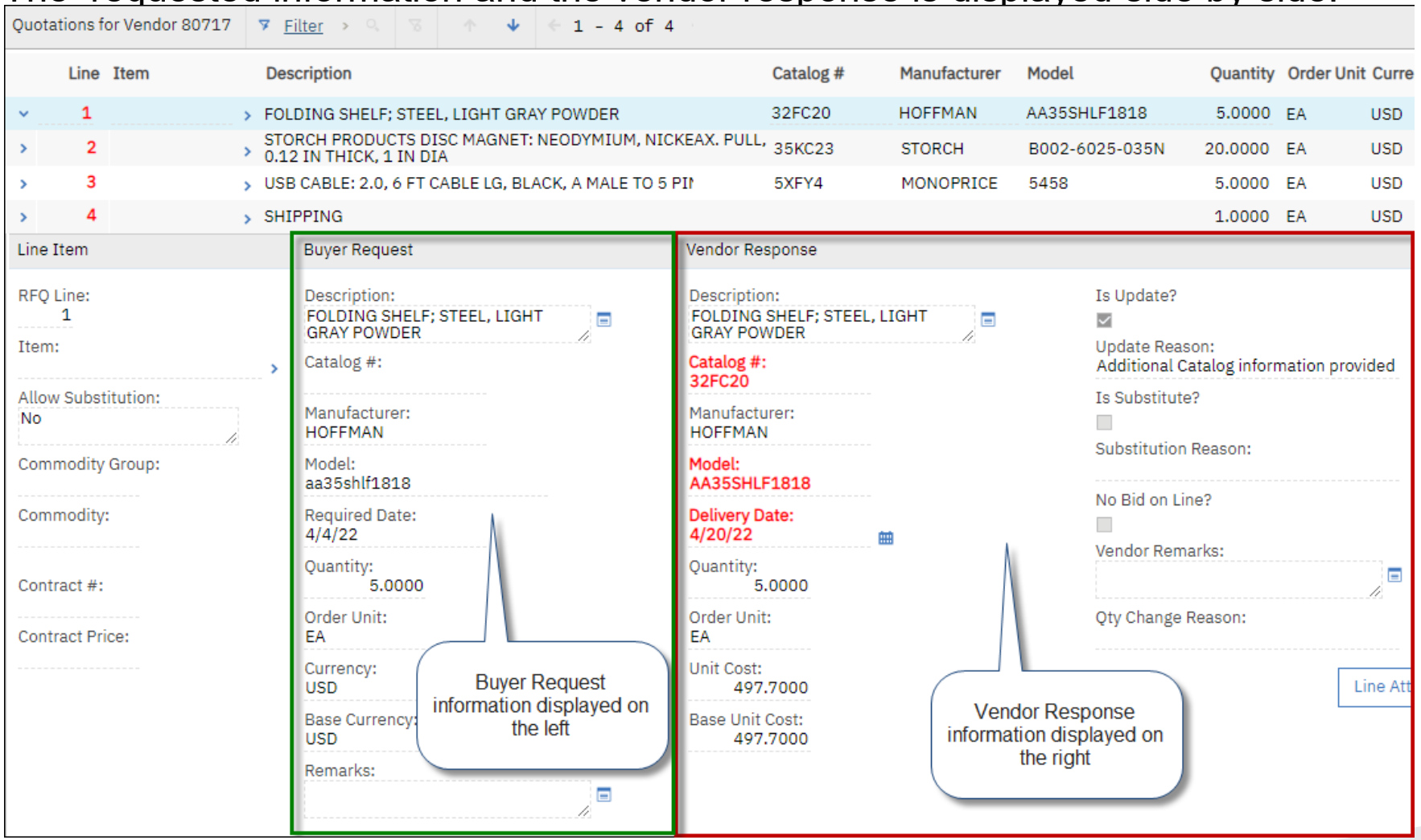

Quote status changes to SUBMITTED when the vendor has submitted their bid unless the bid is sealed



# Sample RFQ: Inventory Items/Materials

Once submitted bids can be reviewed on the Bid Response tab for each line.

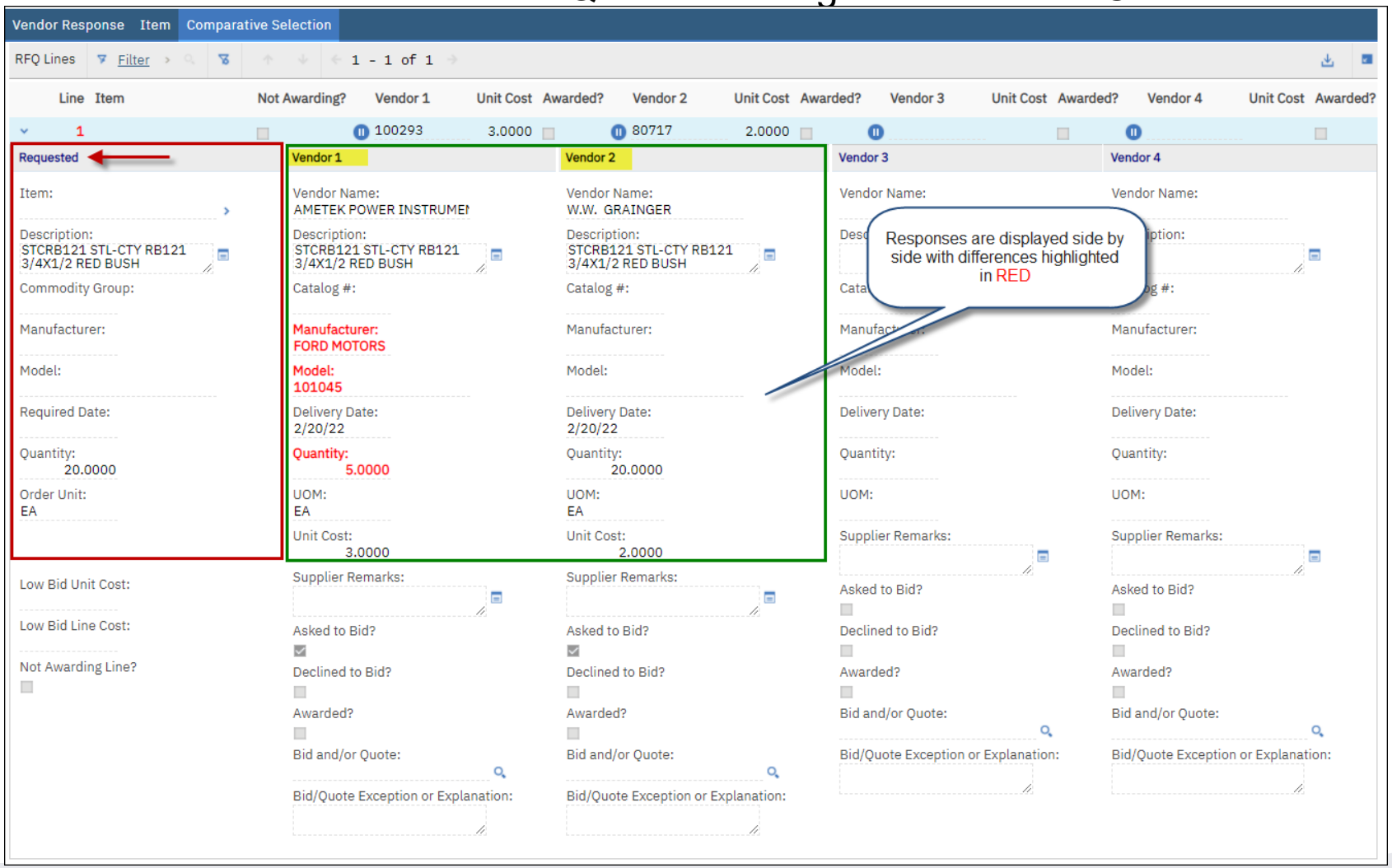
The  requested information and the vendor response is displayed side by side.



# 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.



# Sample RFQ: Inventory Items/Materials

## Request for Quote Details Report

**RFQ1999: Fall 2022 Major** [redacted]

**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 |
| | | | | **Total** | $6.00 |

| Vendor Name | Status | Total Bid |
|---|---|---|
| [redacted] | Quotation Lines Selected | $3,972.32 |
| [redacted] | Regret | $0.00 |

**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 |
|---|---|---|---|---|---|---|---|---|---|
| [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**

| 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 |
|---|---|---|---|---|---|---|---|---|---|
| [redacted] | $0.00 | | | | | | | | $0.00 |
| [redacted] | $1,440.00 | 8/24/22 | | No | Yes | Yes | LOWBID | | $1,440.00 |

**Line # 3: 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 |
|---|---|---|---|---|---|---|---|---|---|
| [redacted] | $0.00 | | | | | | | | $0.00 |
| [redacted] | $33.08 | 8/24/22 | | No | Yes | Yes | LOWBID | | $66.16 |

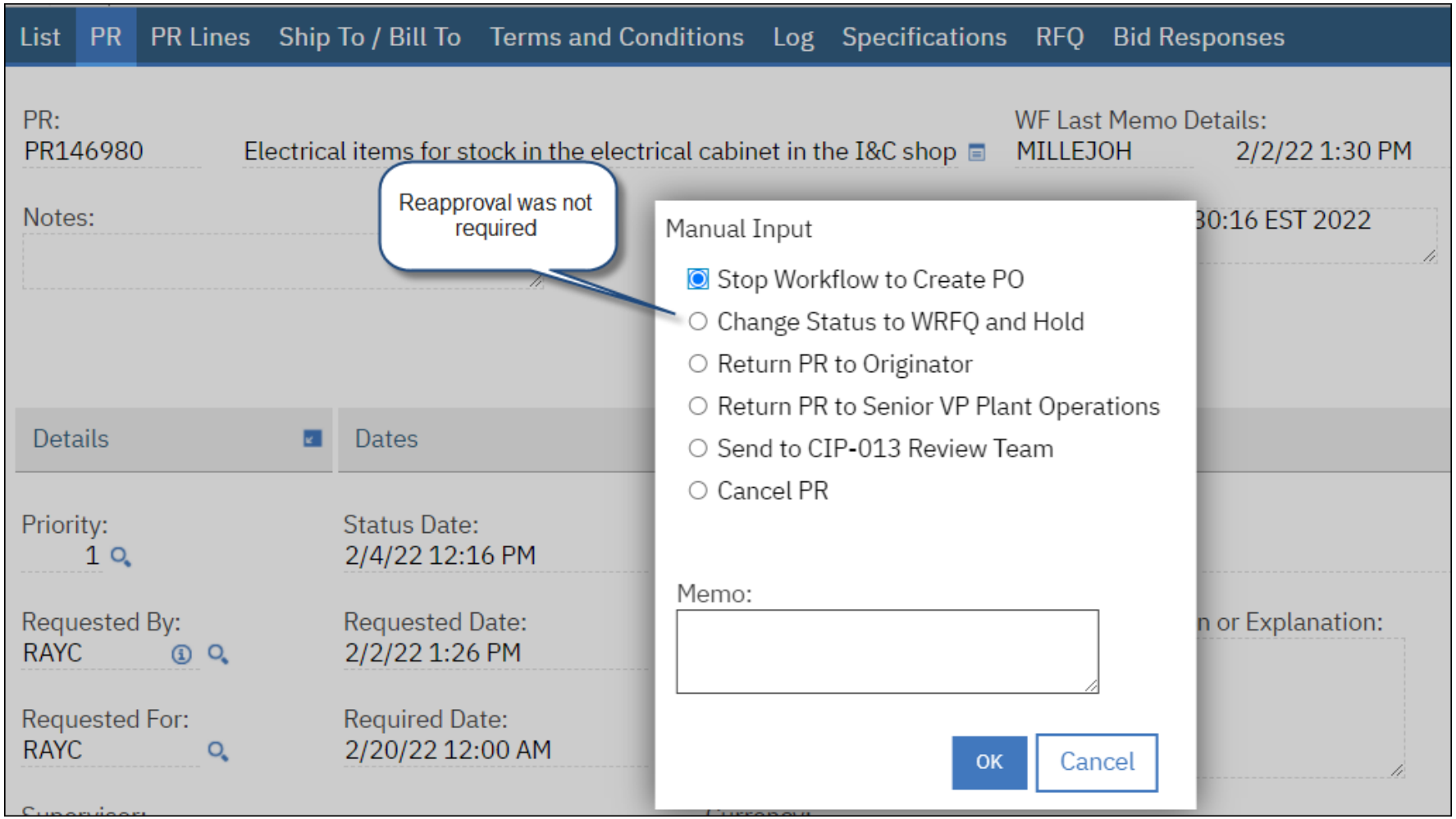
**Line # 4: null**

| 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 |
|---|---|---|---|---|---|---|---|---|---|
| [redacted] | $0.00 | | | | | | | | $0.00 |
| [redacted] | $66.16 | 8/24/22 | | No | Yes | Yes | LOWBID | | $66.16 |

9/6/22 4:51 PM

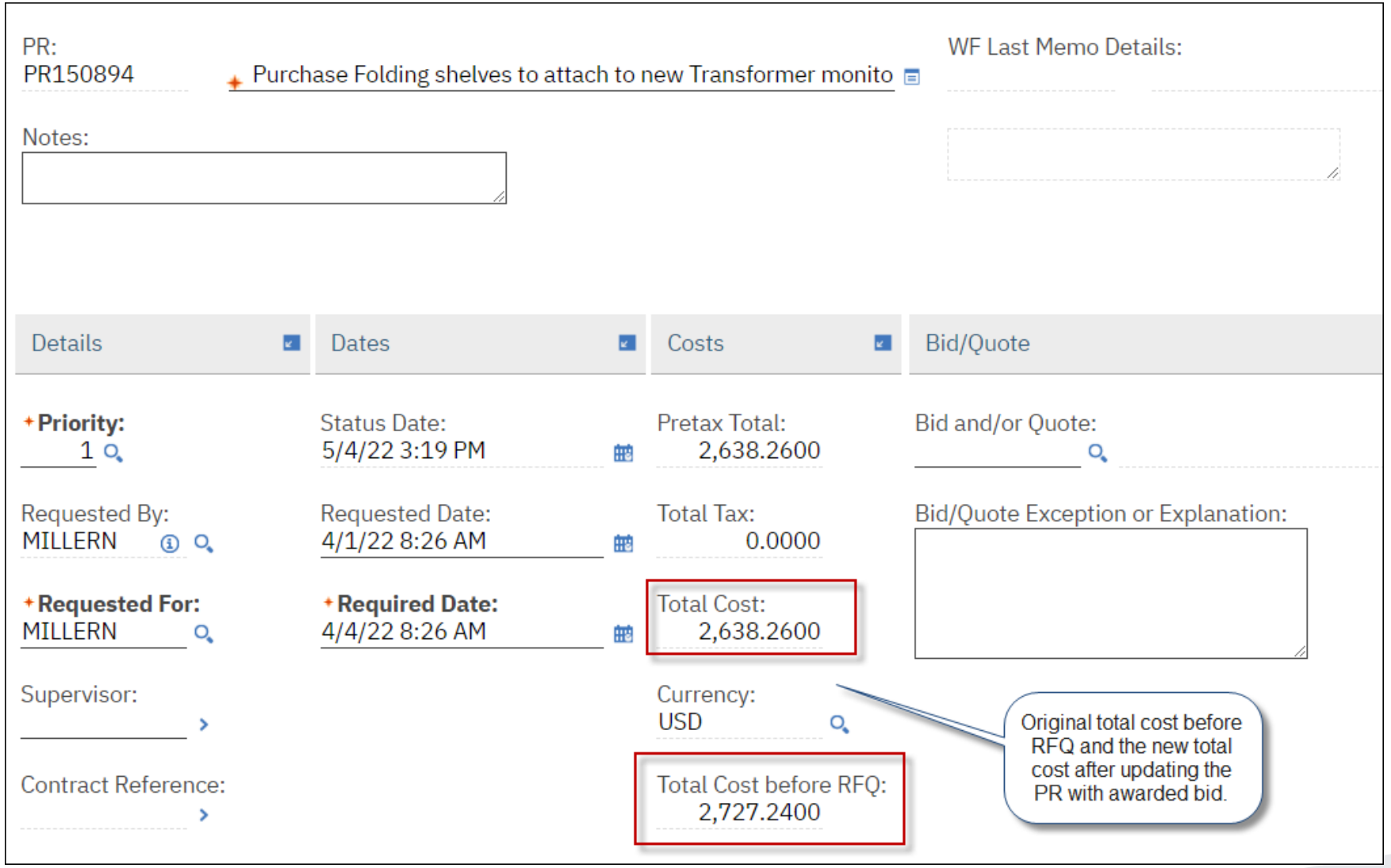
# Sample RFQ: Inventory Items/Materials

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



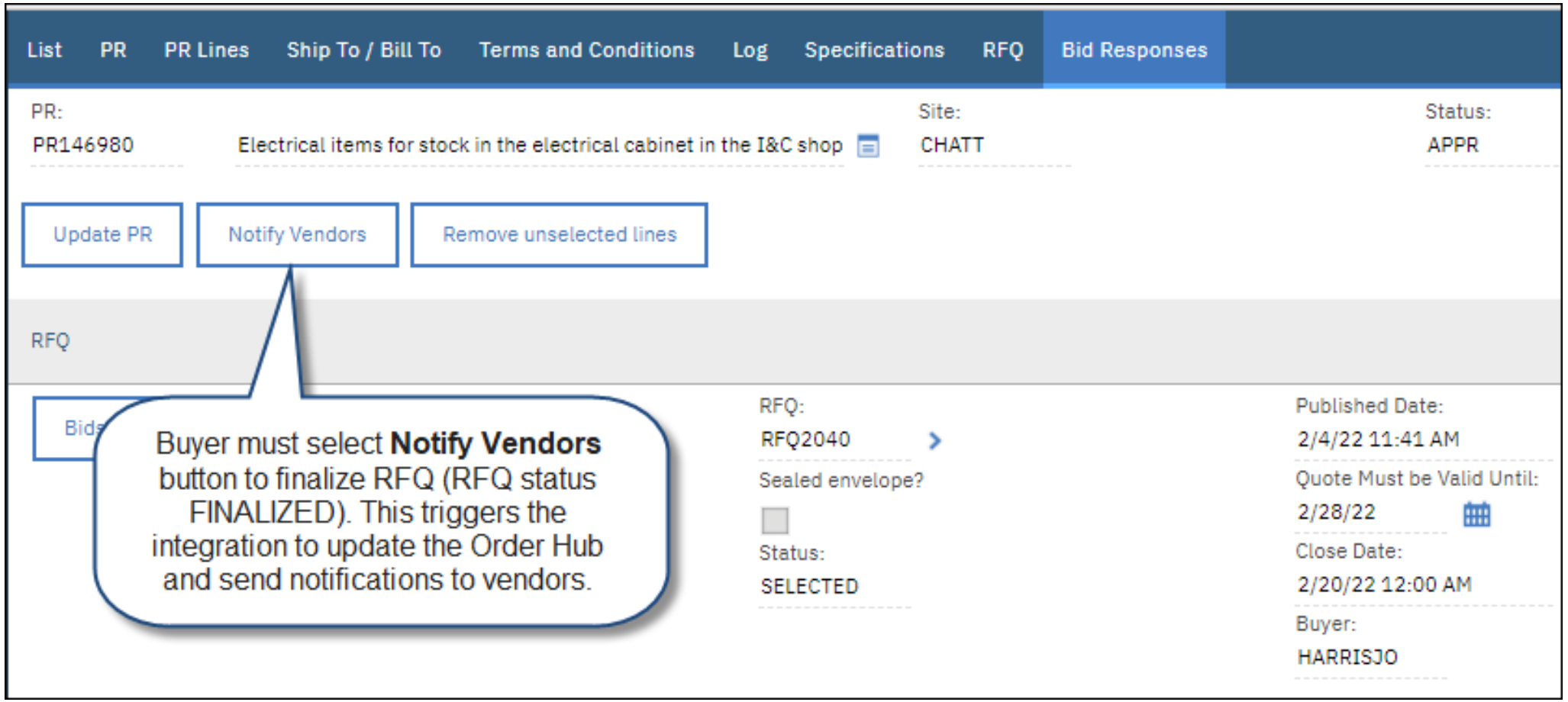
# Sample RFQ: Inventory Items/Materials

Before and after cost comparison



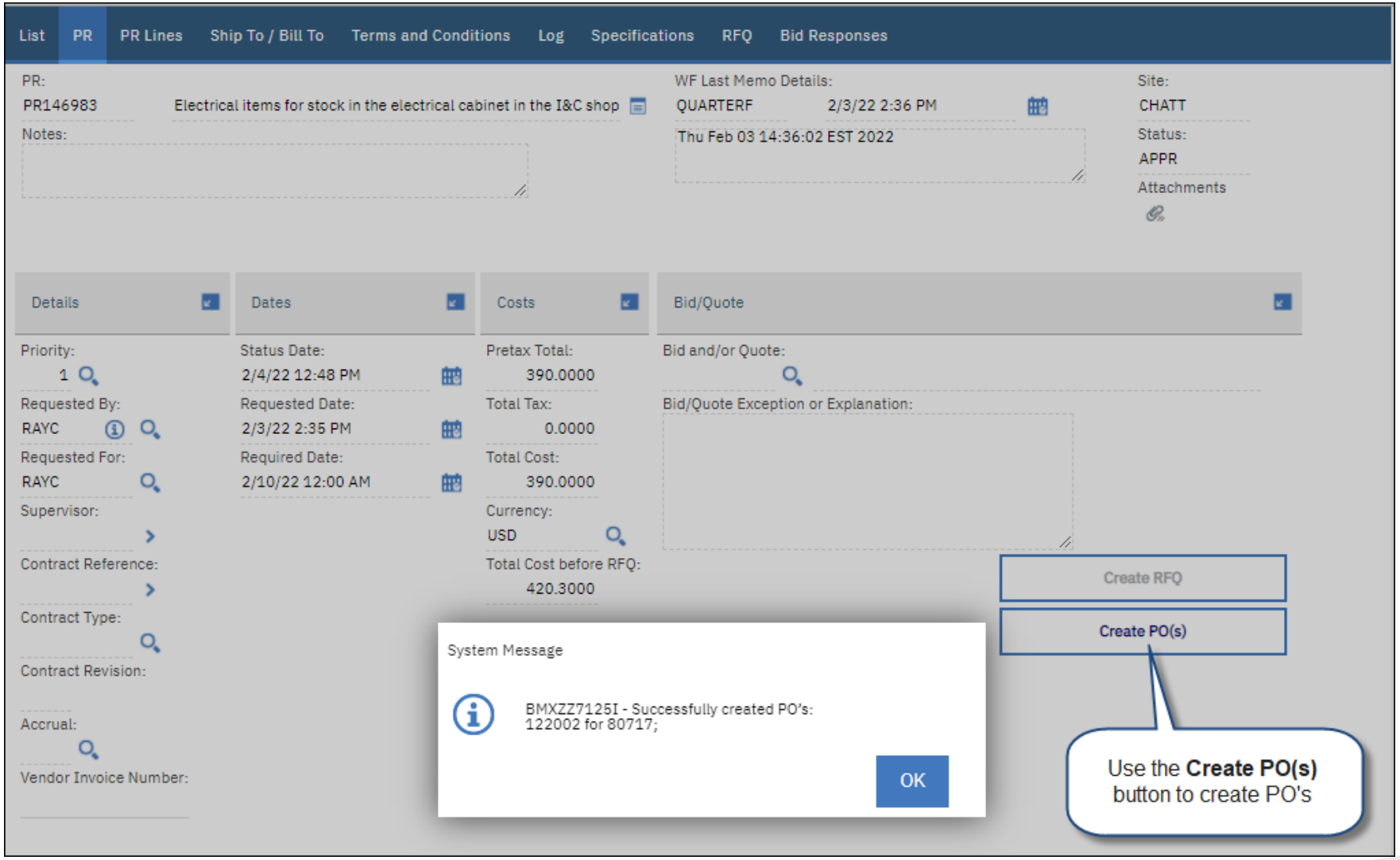
# Sample RFQ: Inventory Items/Materials

Next, send award/regret notifications and finalize the RFQ



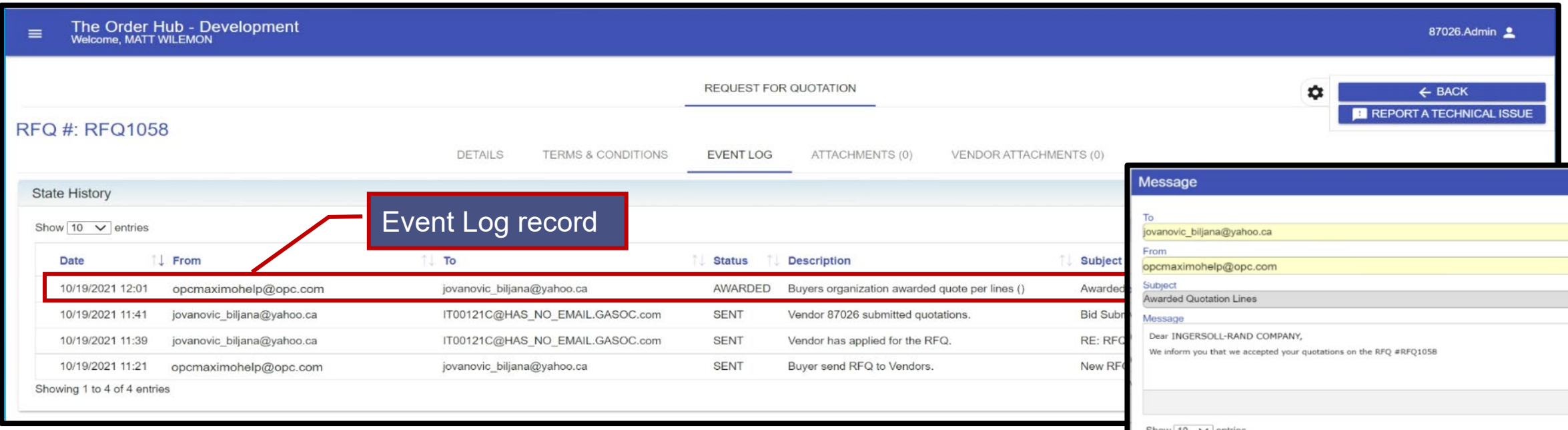
# Sample RFQ: Inventory Items/Materials

The Create PO(s) button is now available.

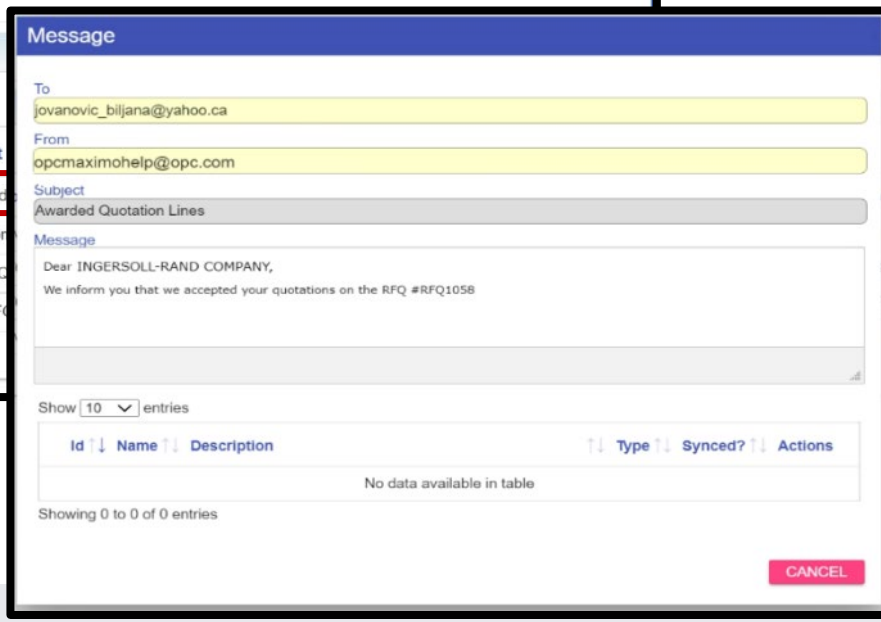


# Awarded Notification

E-mail notification

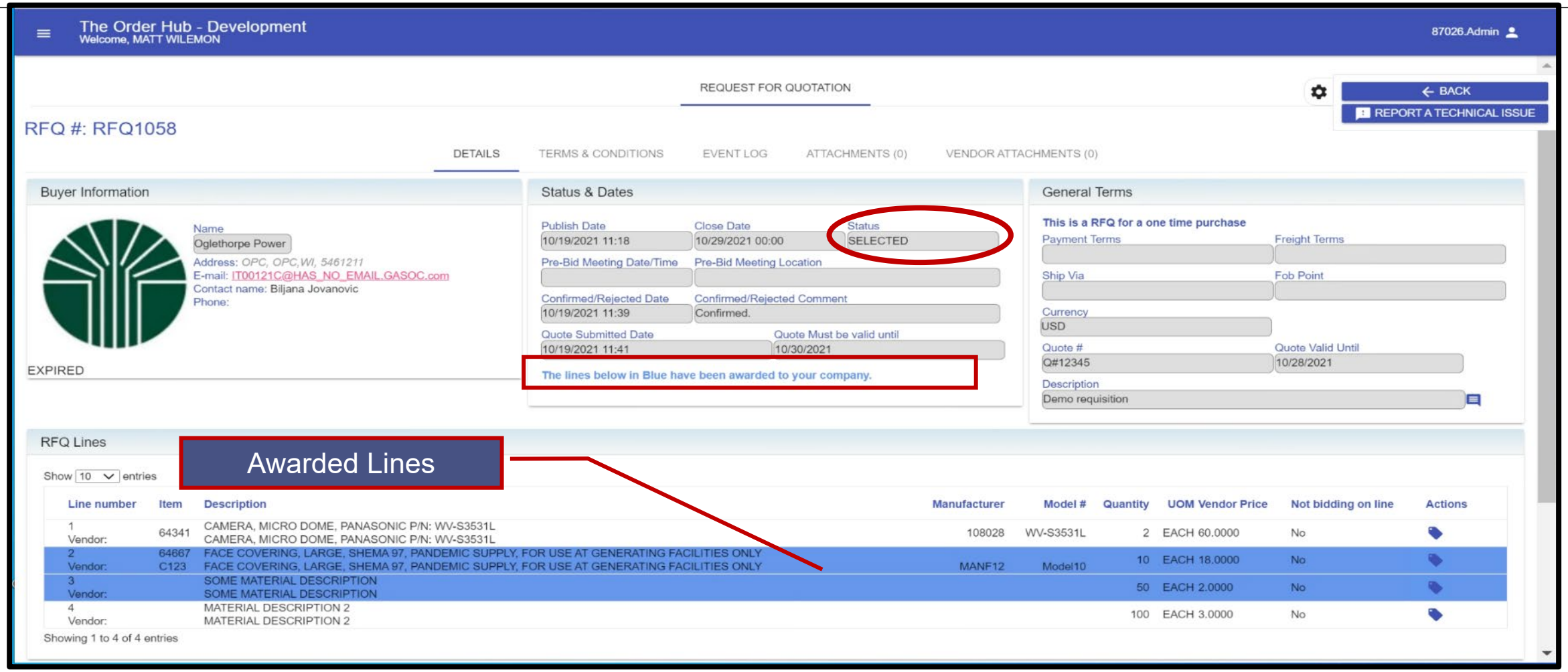



Event Log record



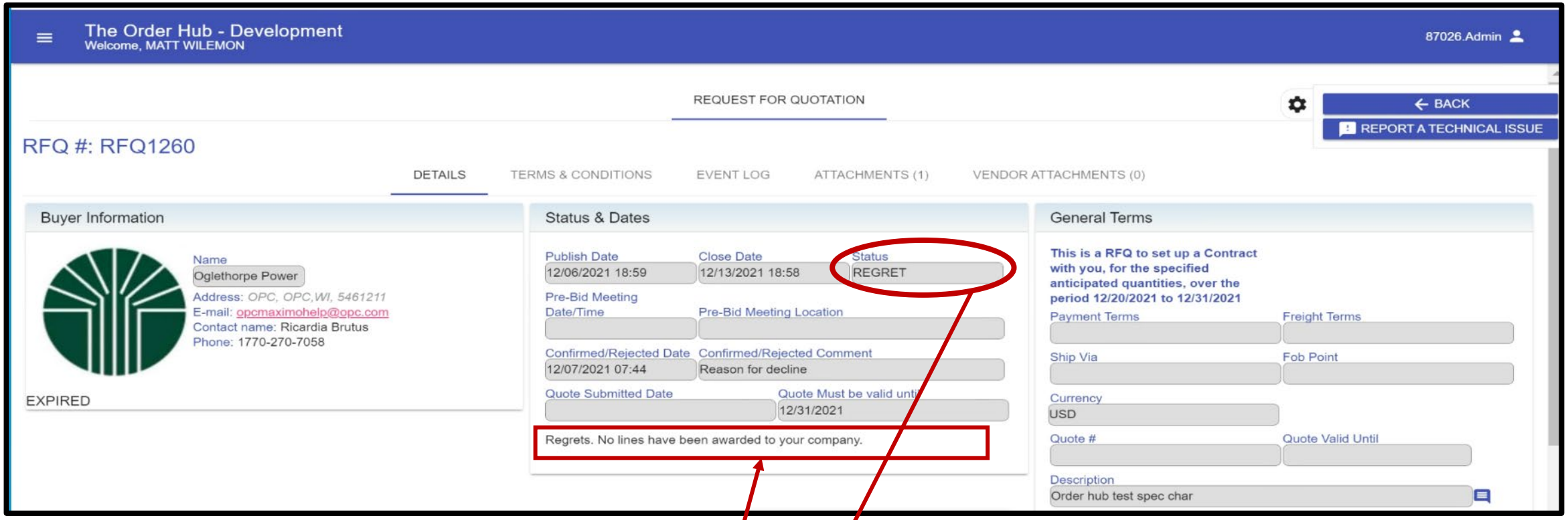

© 2016-2022 P2INSIGHT Inc..

# Awarded RFQs – Winning Vendors




© 2016-2022 P2INSIGHT Inc..

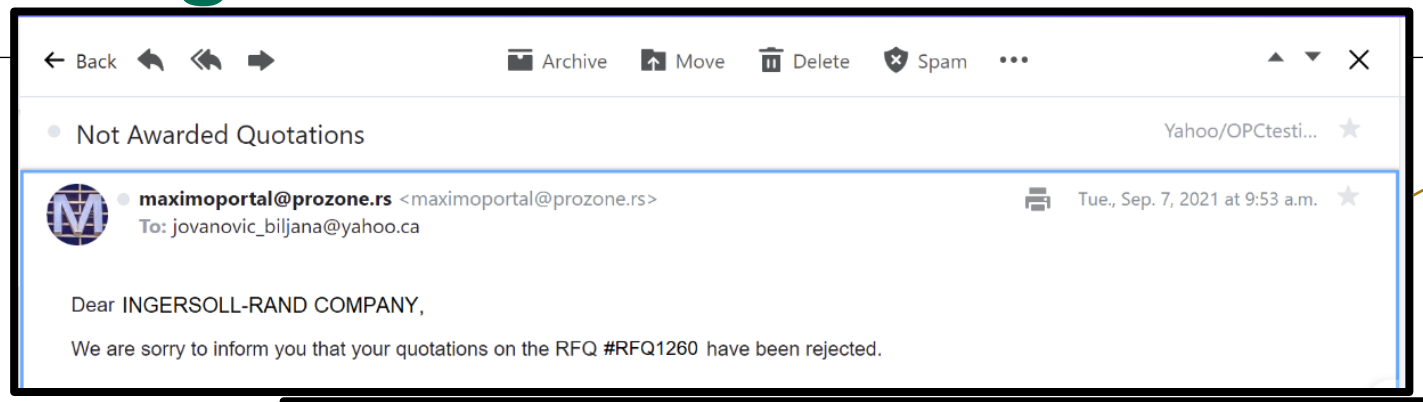
# Awarded RFQs – Regret Vendors




REGRET message and RFQ status change to REGRET

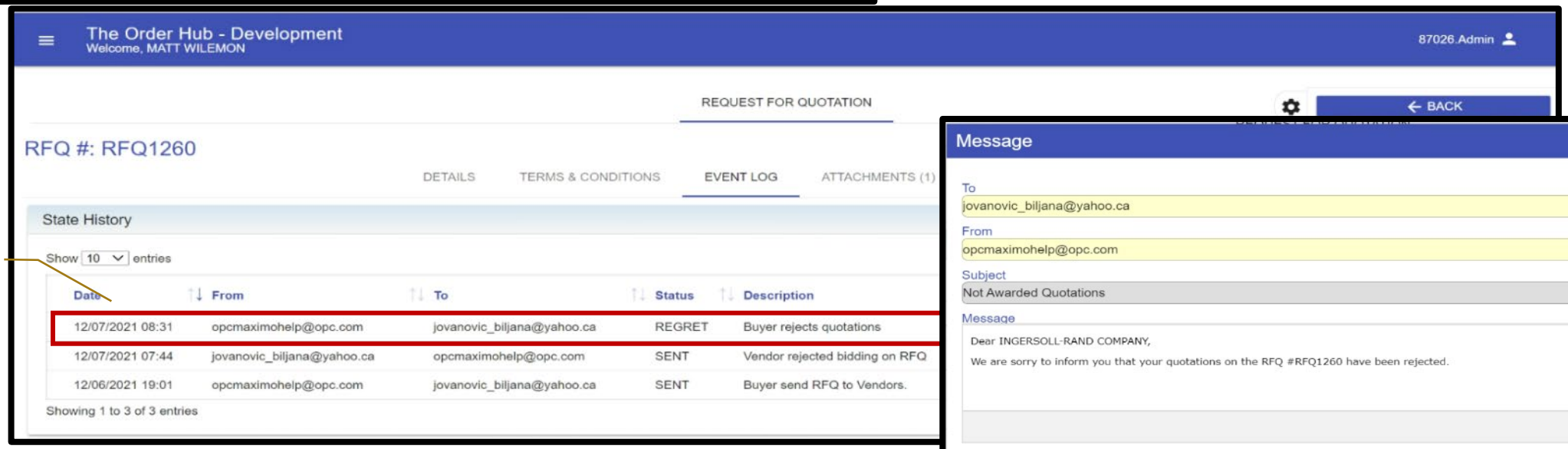
© 2016-2022 P2INSIGHT Inc..

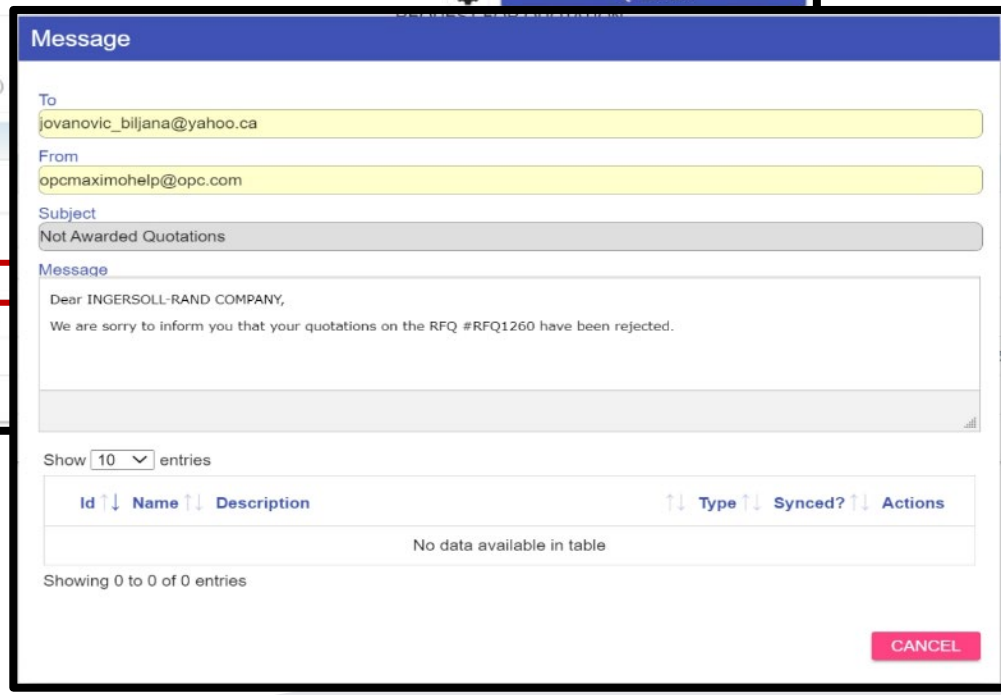
# Regret Notification




E-mail notification

Event Log record




© 2016-2022 P2INSIGHT Inc..

# 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.

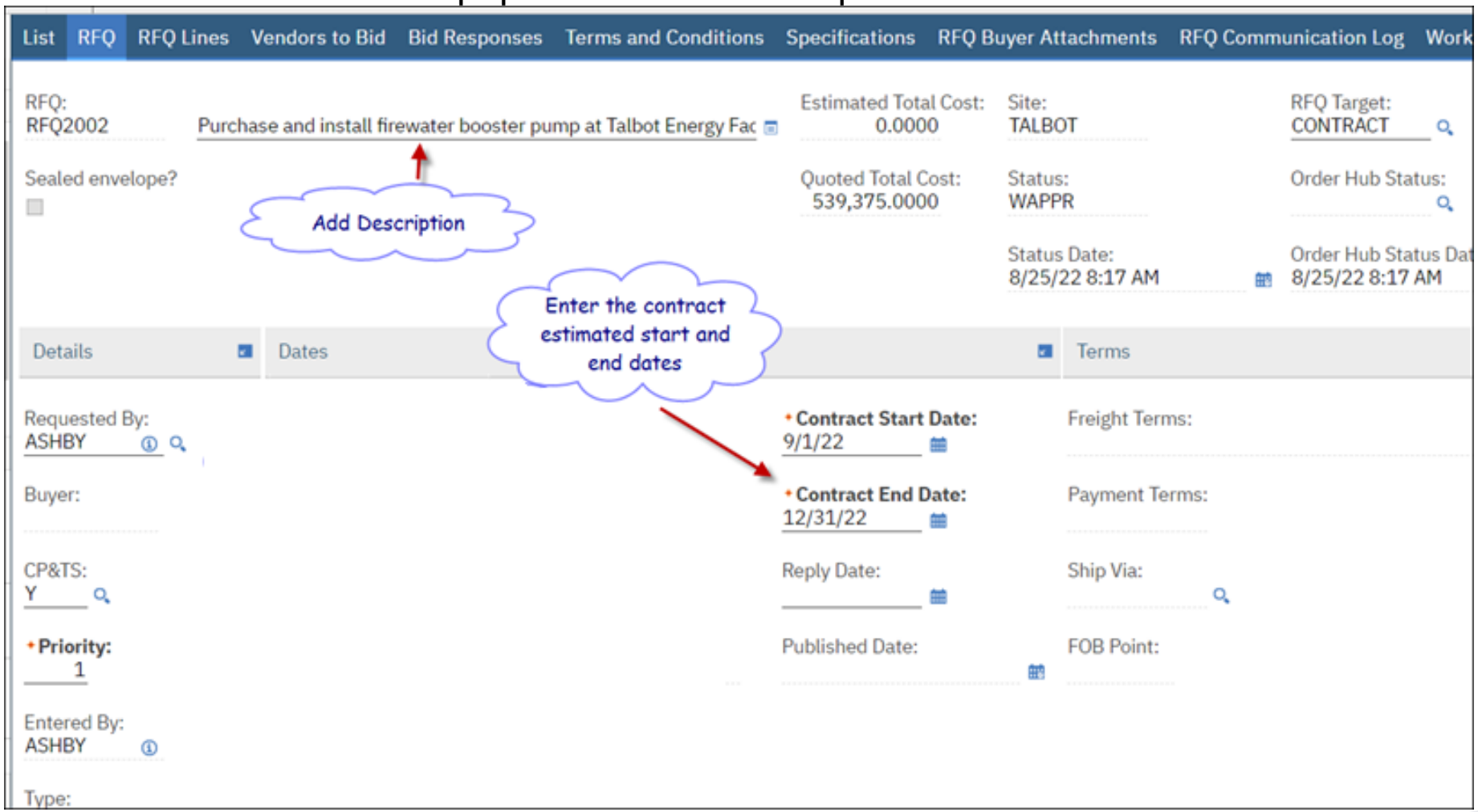
We wanted to combine this into one system (Maximo) so we changed our user's process.

- 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

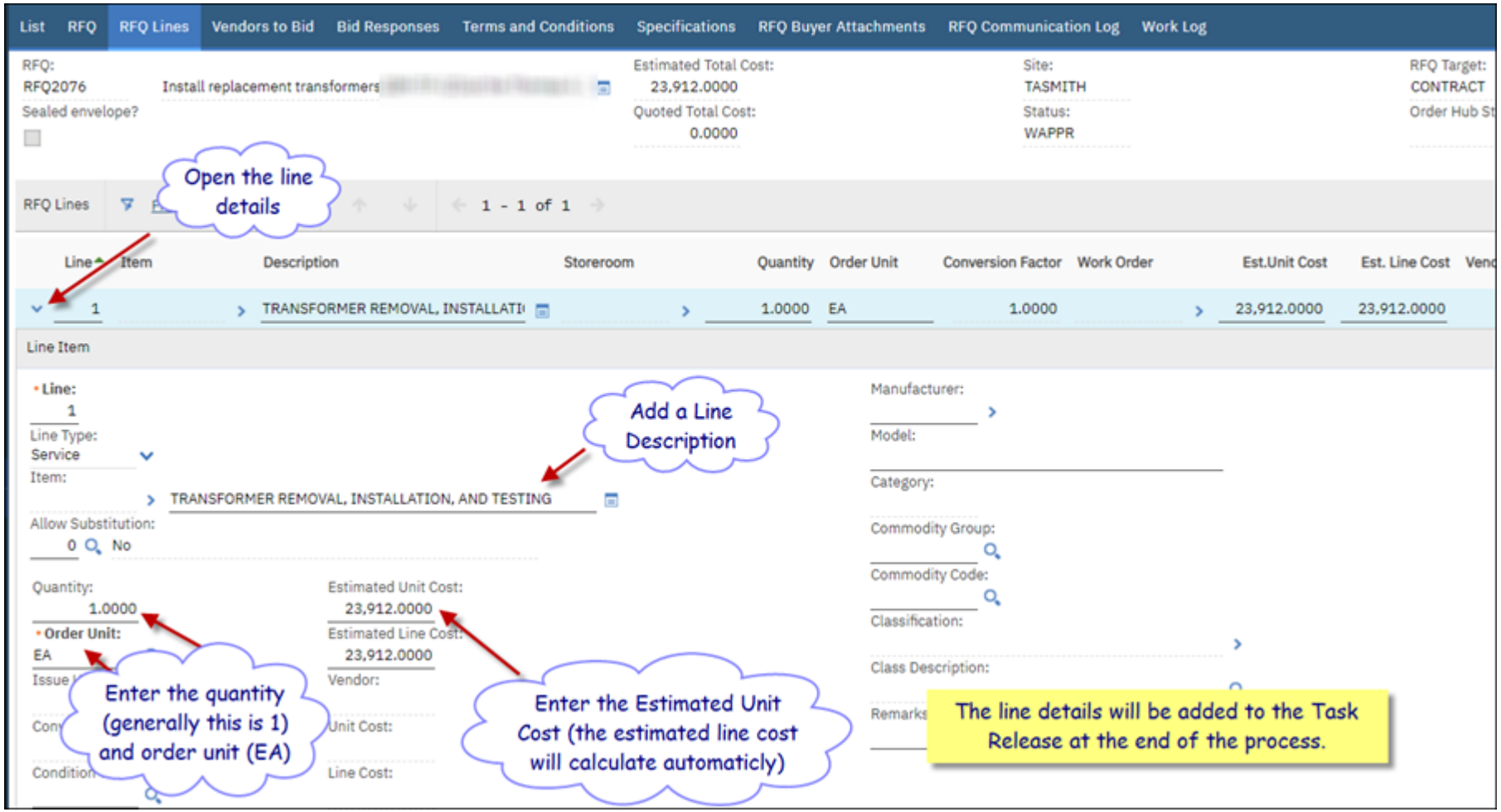
The User (Not Supply Chain) creates an RFQ

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



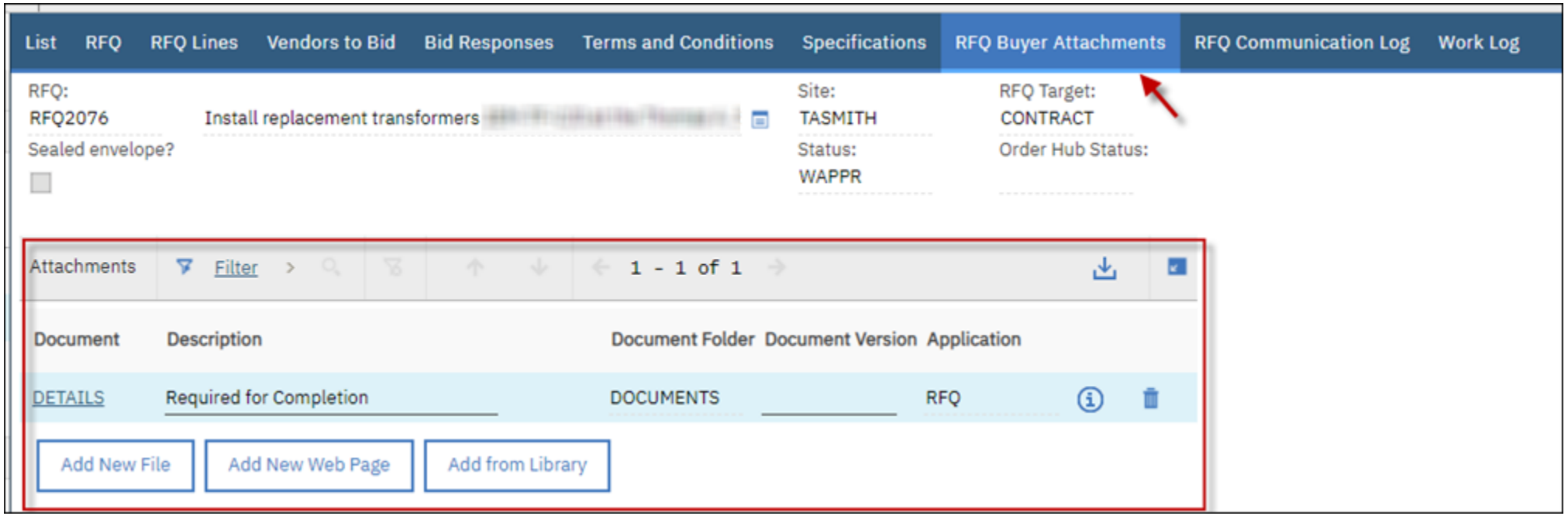
# Sample RFQ: Contracts

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.



# Sample RFQ: Contracts

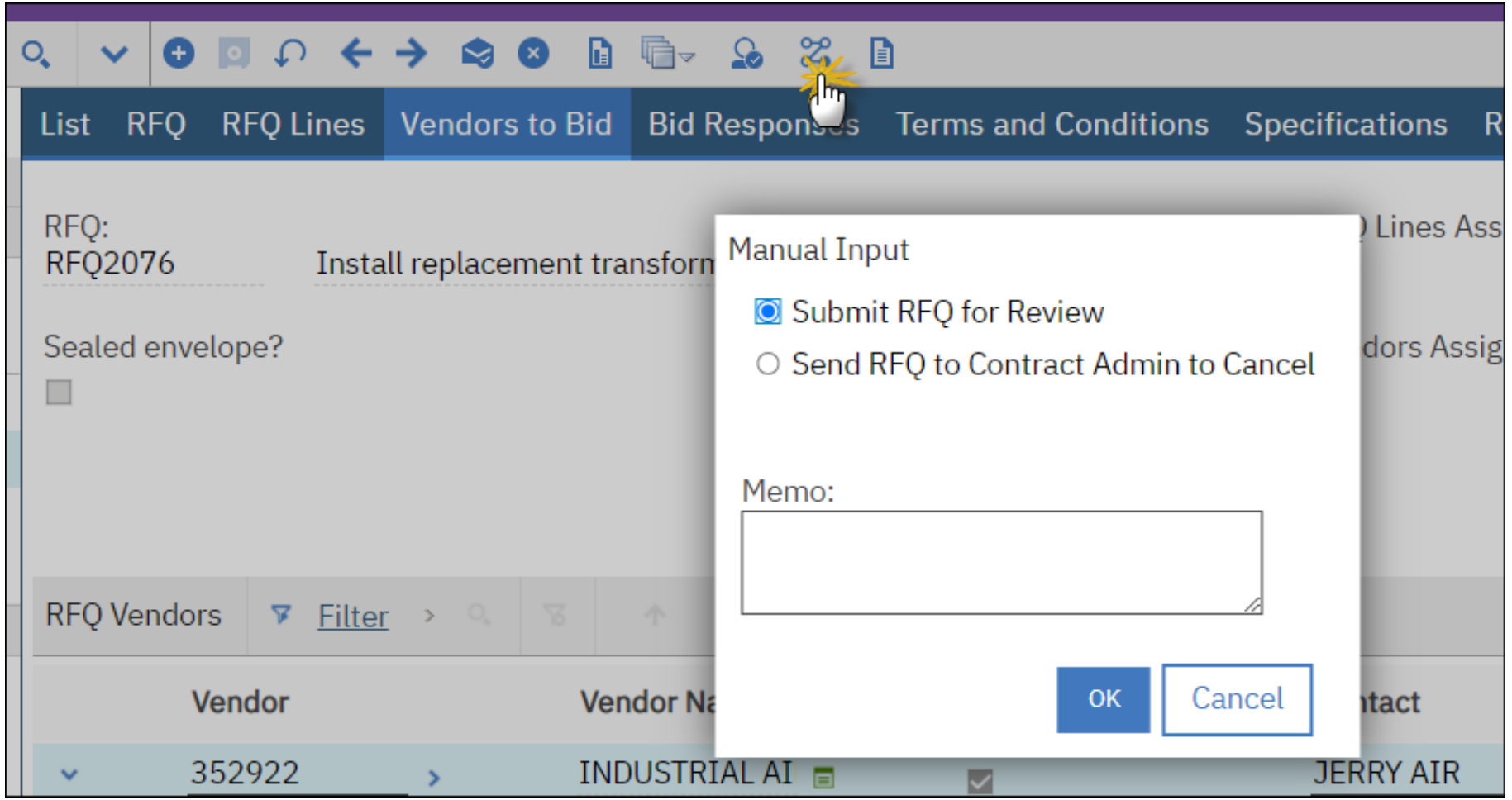
Attachments can be added on the “RFQ Buyer Attachments” tab




These attachments are sent to <u>all</u> vendors on the RFQ when the RFQ is sent to the vendors

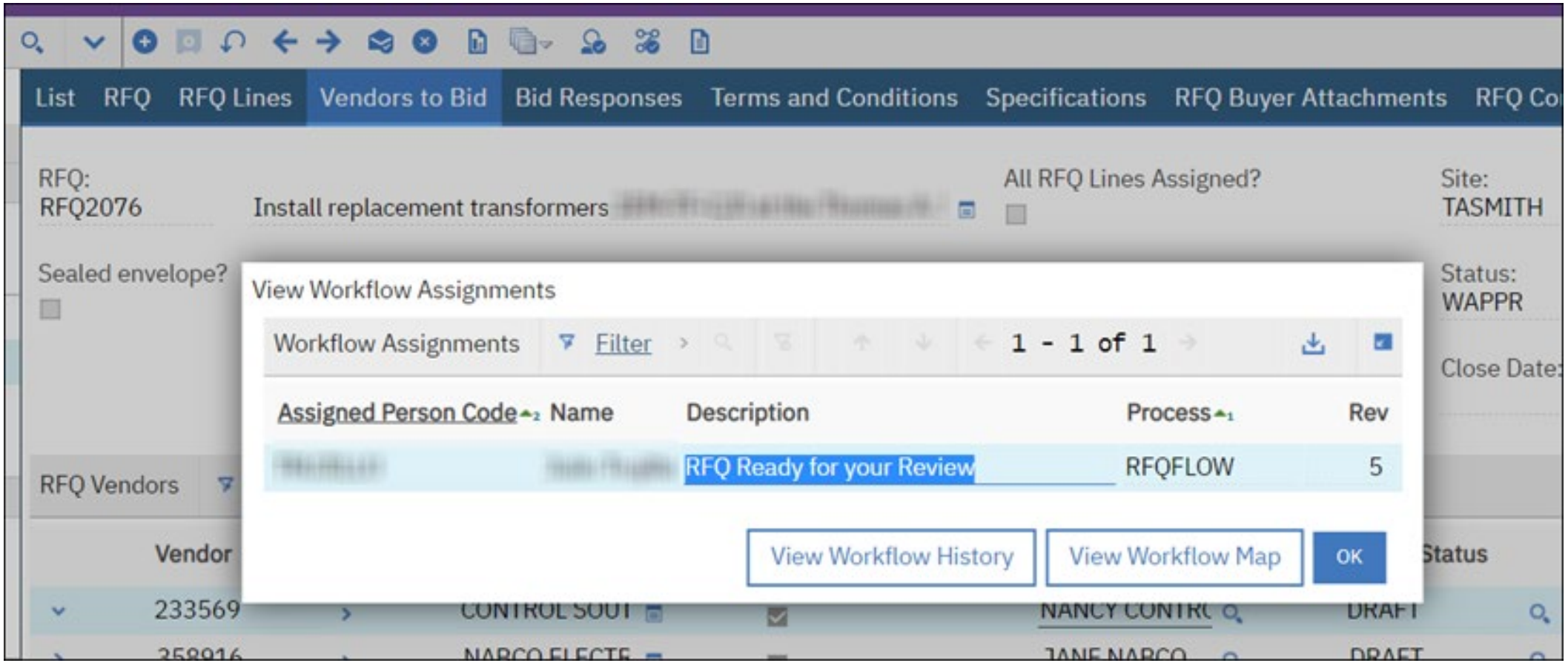
# Sample RFQ: Contracts

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



# Sample RFQ: Contracts

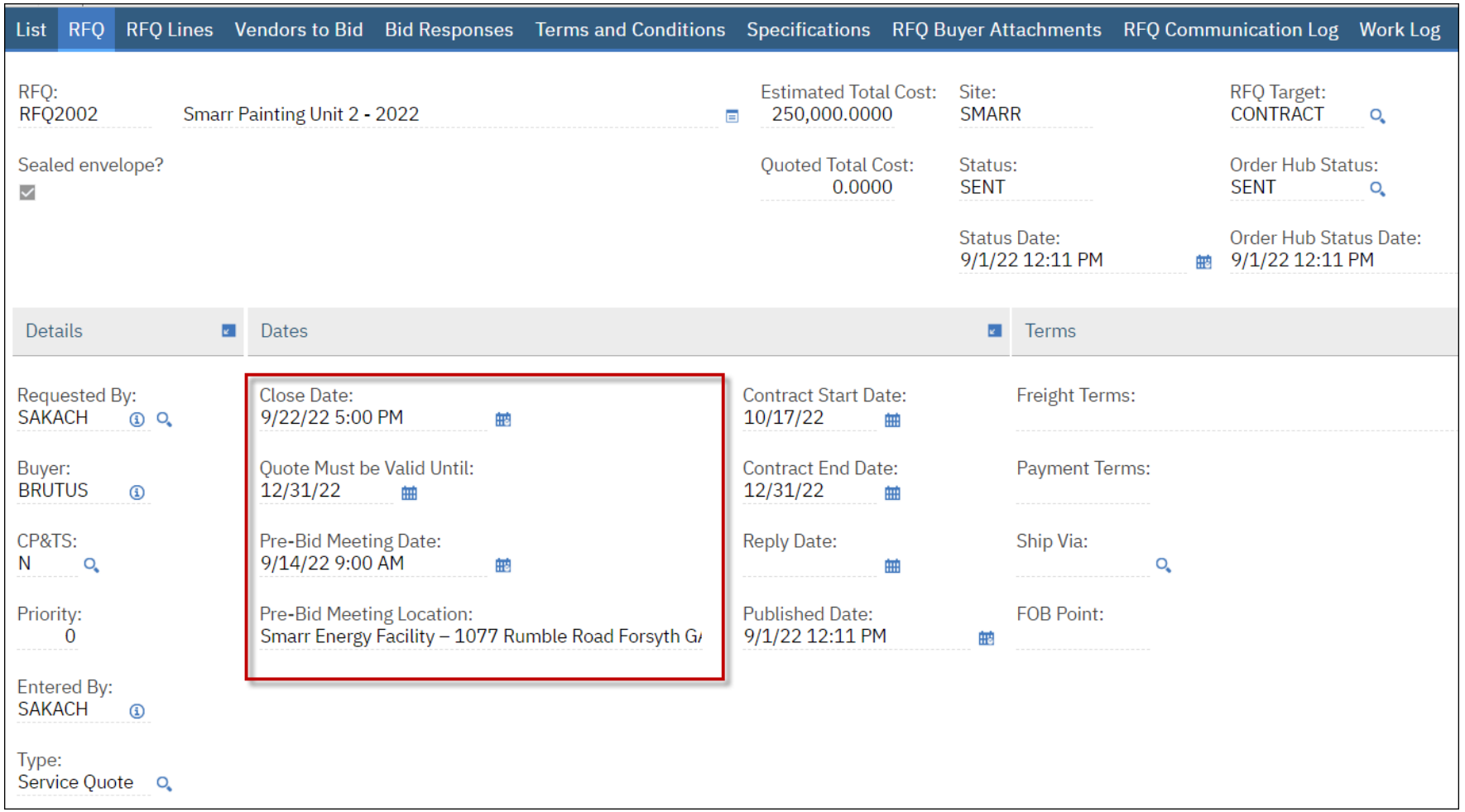
RFQ is sent to Requestor's Supervisor for review and approval to send to Contract Agents



# Sample RFQ: Contracts

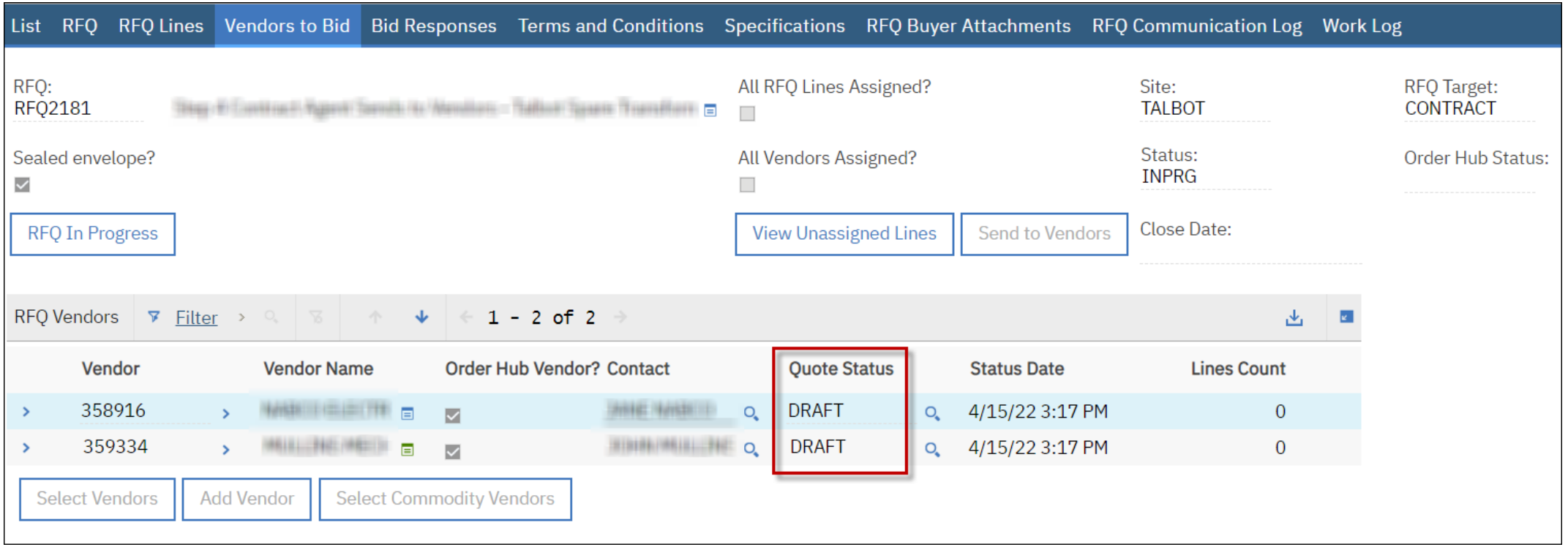
The Contract Administrators complete the following steps:

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



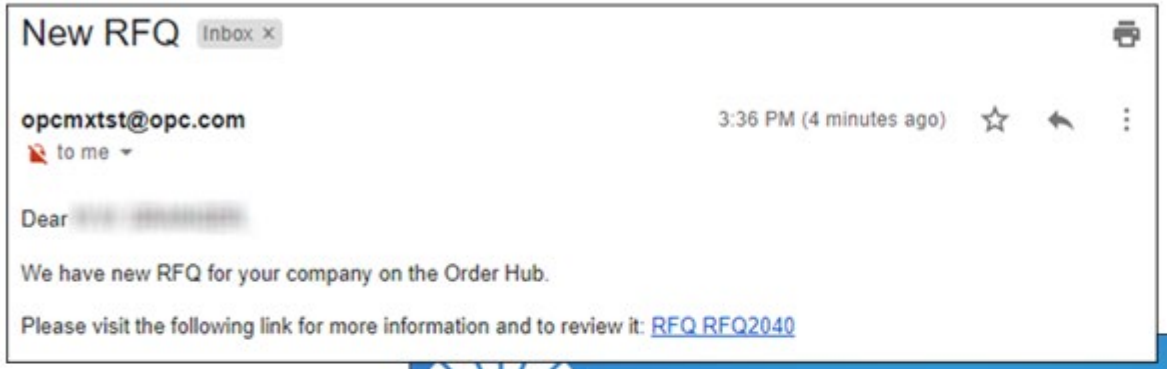
# Sample RFQ: Contracts

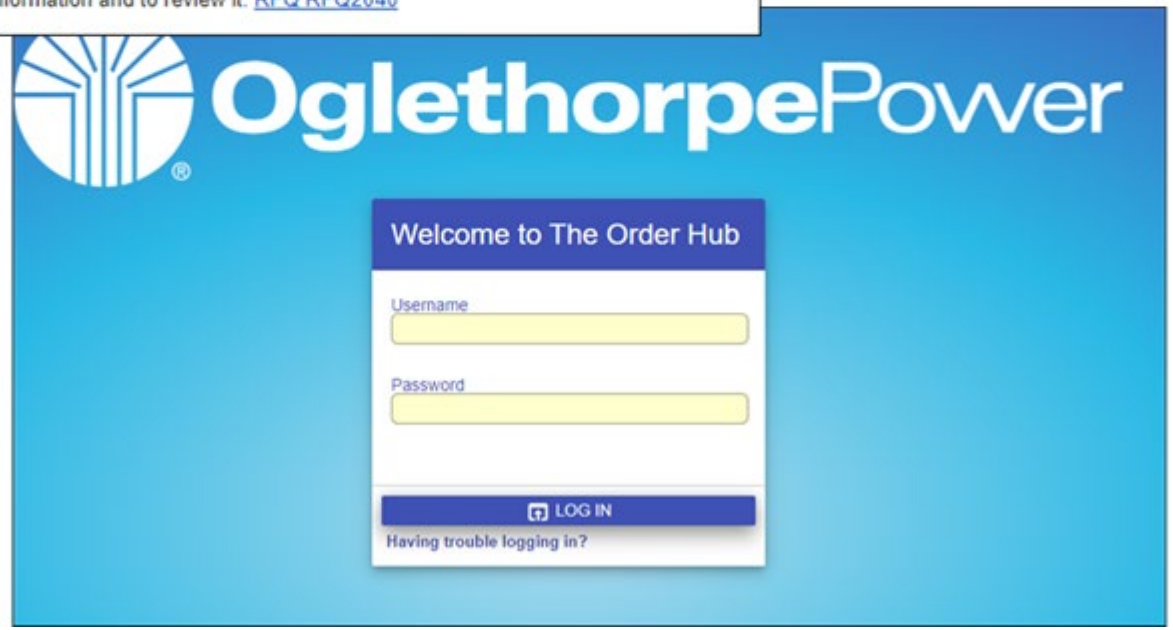
- Add/adjust vendors and assign RFQ lines to each vendor.
  - RFQ status **INPRG**
  - Vendor Quote status **DRAFT**



# 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.

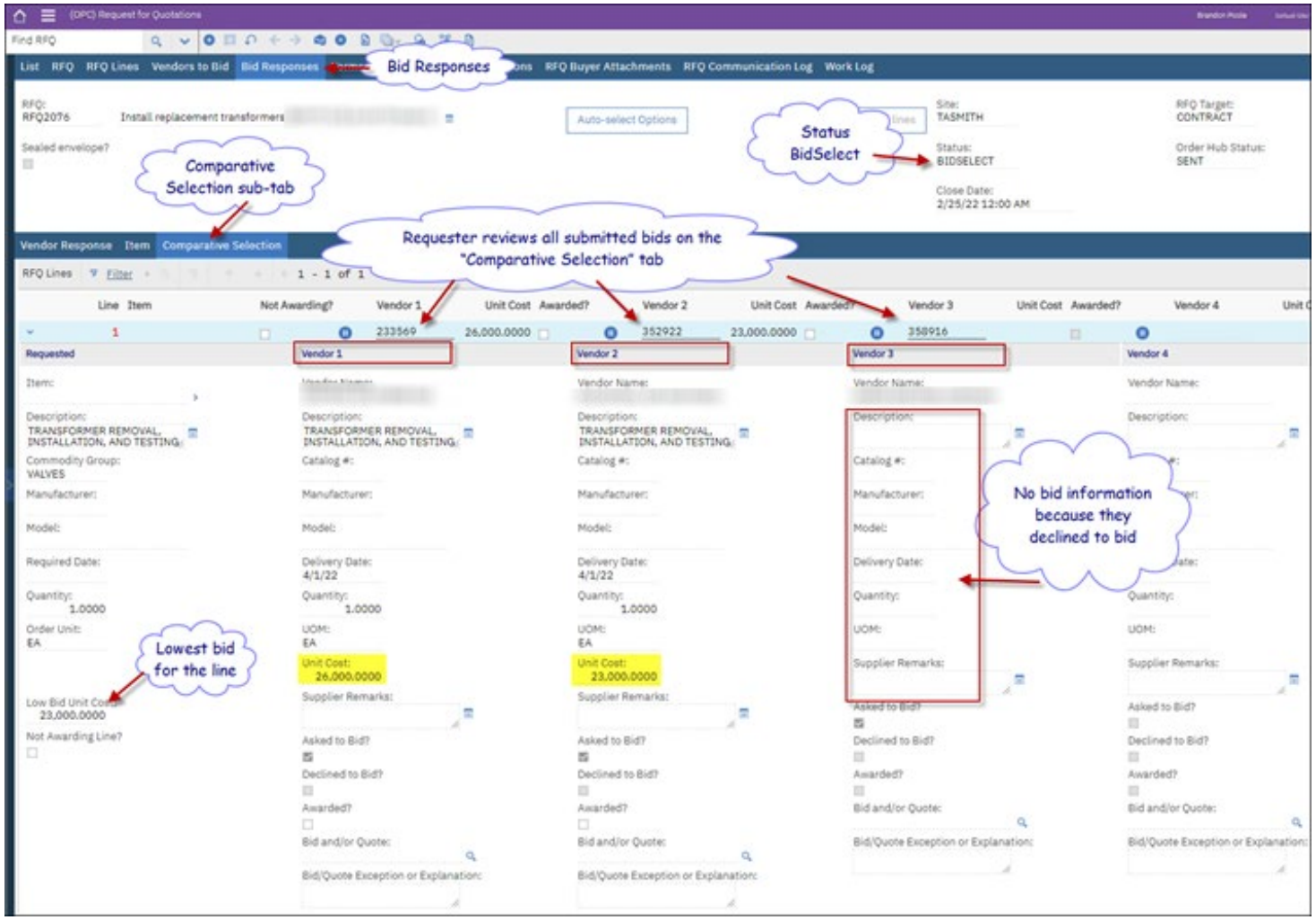


# Sample RFQ: Contracts

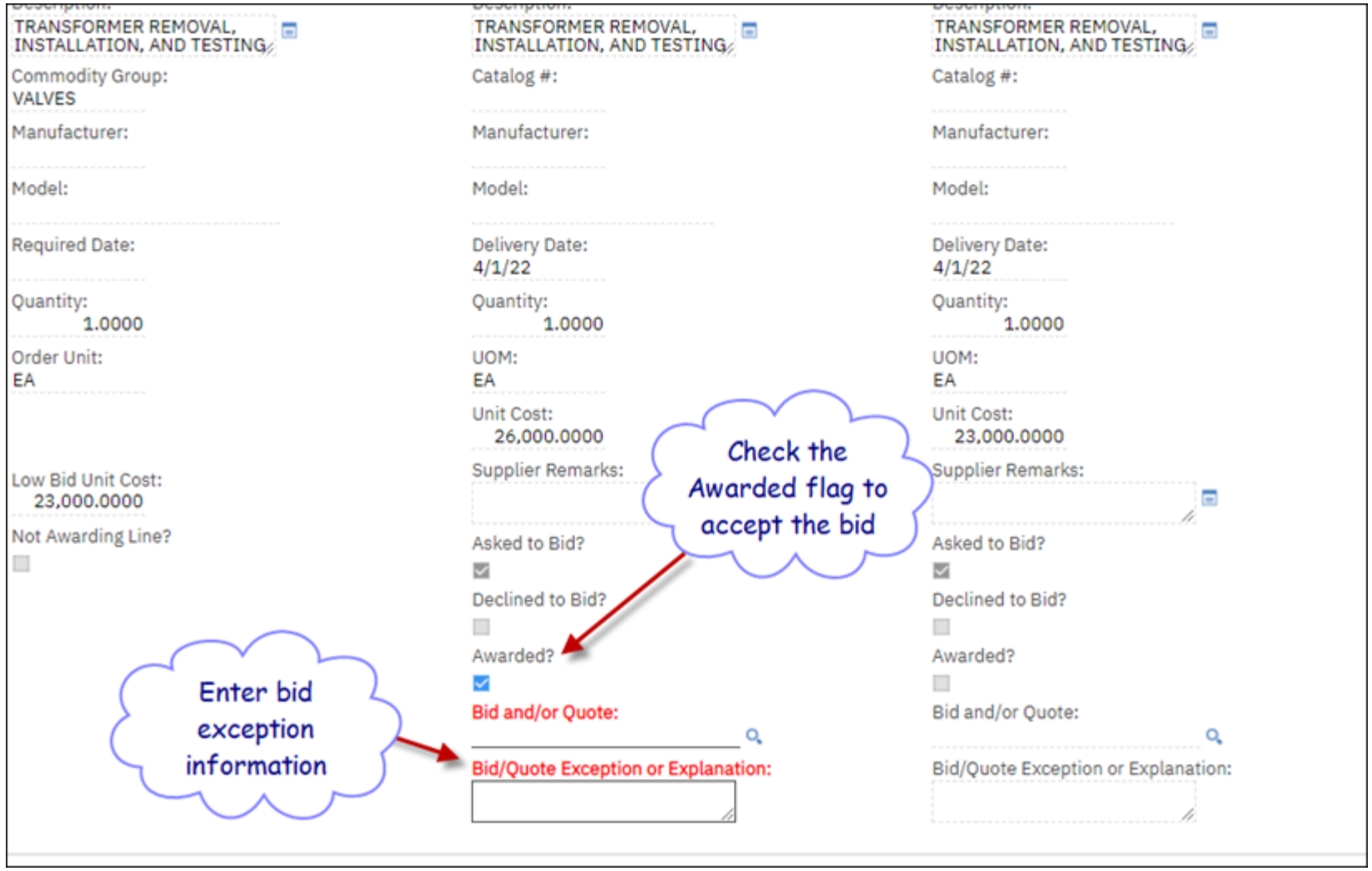
Contract Agent sends RFQ back to the Requestor to review bids

RFQ Status **BIDSELECT**



# Sample RFQ: Contracts

- Picks winning Bid and Enters Bid exception information



# Sample RFQ: Contracts

## Request for Quote Details Report

**RFQ1422: Batteries Replacement at the Effingham Energy Facility**

**Site:** EFFINGHA
**Requested By:** Matt Luchner
**Status:** QUOTAPPR
**Required Date:**
**Requested Date:** 4/12/22
**Sealed Bid:** Yes
**Est. Total Cost: $679,163.00**

**RFQ Line Details**

| Line | Description | Quantity | Order Unit | Est. Unit Cost | Est. Line Cost |
|---|---|---|---|---|---|
| 1 | [redacted] | 1 | DOLLAR | $240,464.00 | $240,464.00 |
| 2 | [redacted] | 1 | DOLLAR | $156,008.00 | $156,008.00 |
| 3 | [redacted] | 1 | DOLLAR | $156,008.00 | $156,008.00 |
| 4 | [redacted] | 1 | DOLLAR | $126,683.00 | $126,683.00 |
| | | | | **Total** | $679,163.00 |

| Vendor Name | Status | Total Bid |
|---|---|---|
| [redacted] | Regret | $690,883.00 |
| [redacted] | Regret | $0.00 |
| [redacted] | Quotation Lines Selected | $445,925.00 |

**Bid Line Details**

**Line # 1: null**

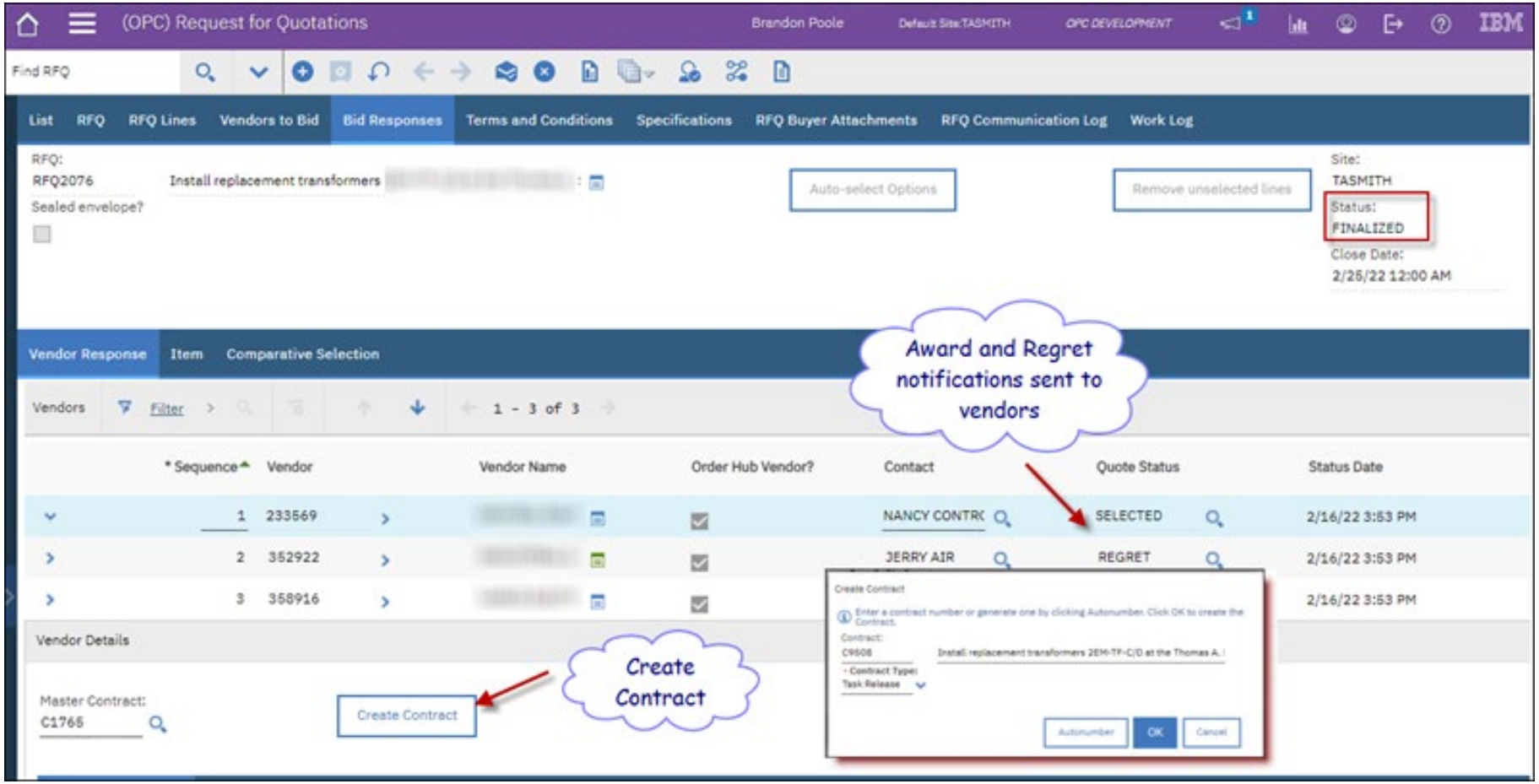
| Name | Unit Cost | Delivery Date | Supplier Remarks | Declined to Bid? | Low Bid | Proposed Awarded Bid | Bid and/or Quote | Bid/Quote Exception | Quote Total Cost |
|---|---|---|---|---|---|---|---|---|---|
| [redacted] | $0.00 | | | | | | | | $0.00 |
| [redacted] | $223,935.00 | 10/7/22 | | No | | | | | $223,935.00 |
| [redacted] | $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 |
|---|---|---|---|---|---|---|---|---|---|
| [redacted] | $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.



# 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 casing 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.

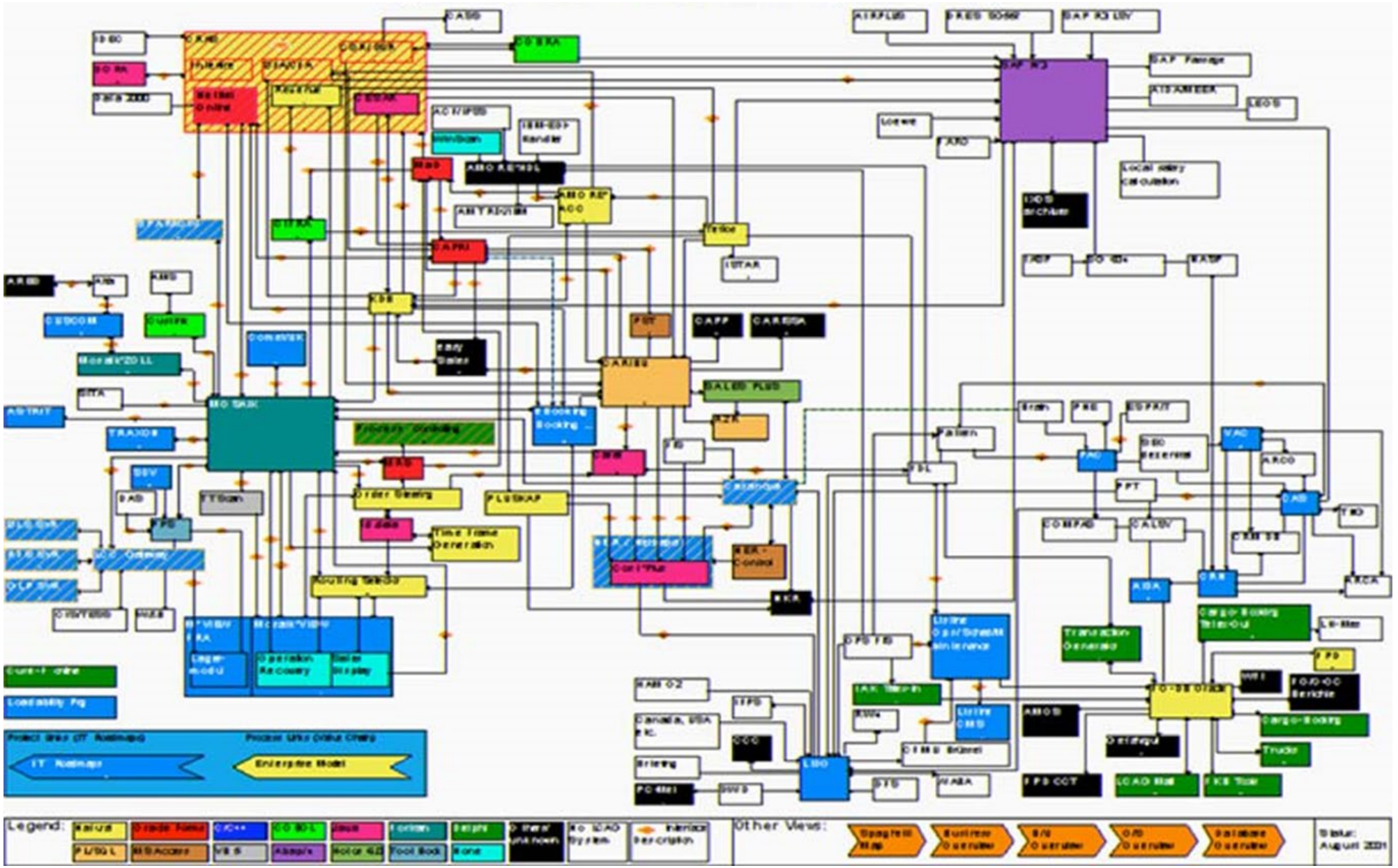
# Opportunities in OPC

- 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

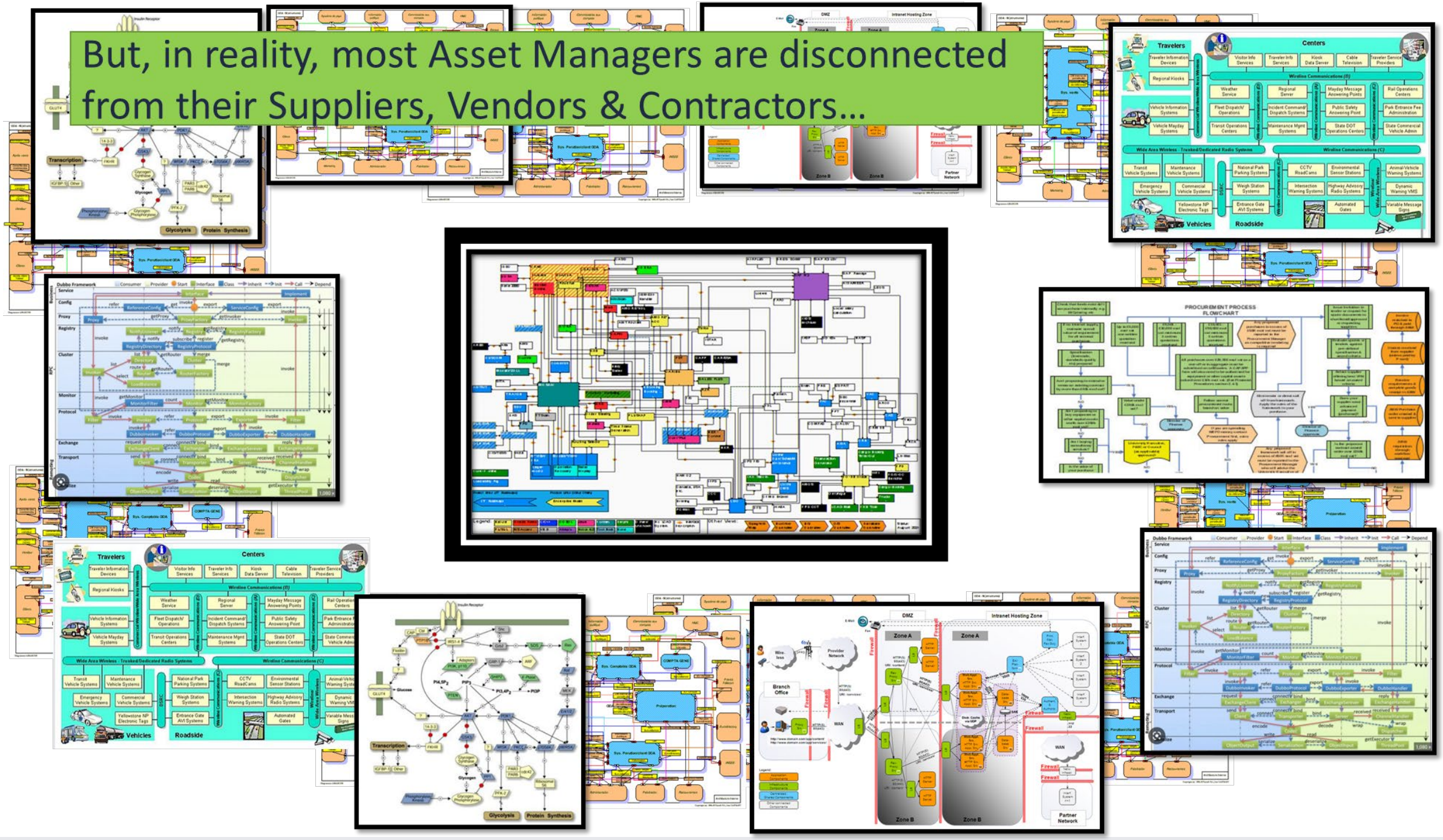
# Further Opportunities using P2Insight

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

**Most Maximo Users think their systems chart looks like this**



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

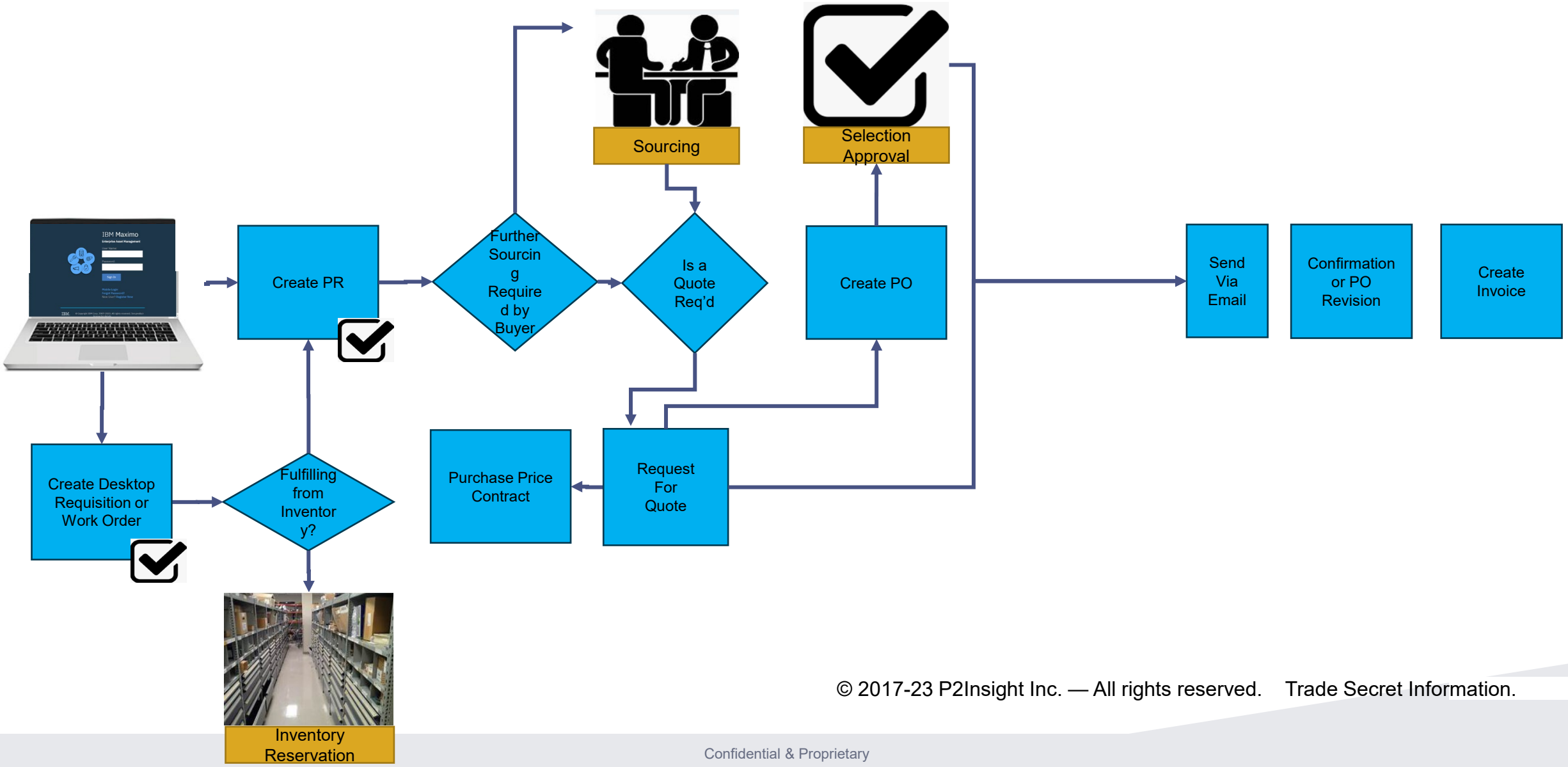


# OPC started with one of two of the most common first step with e-commerce

- 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

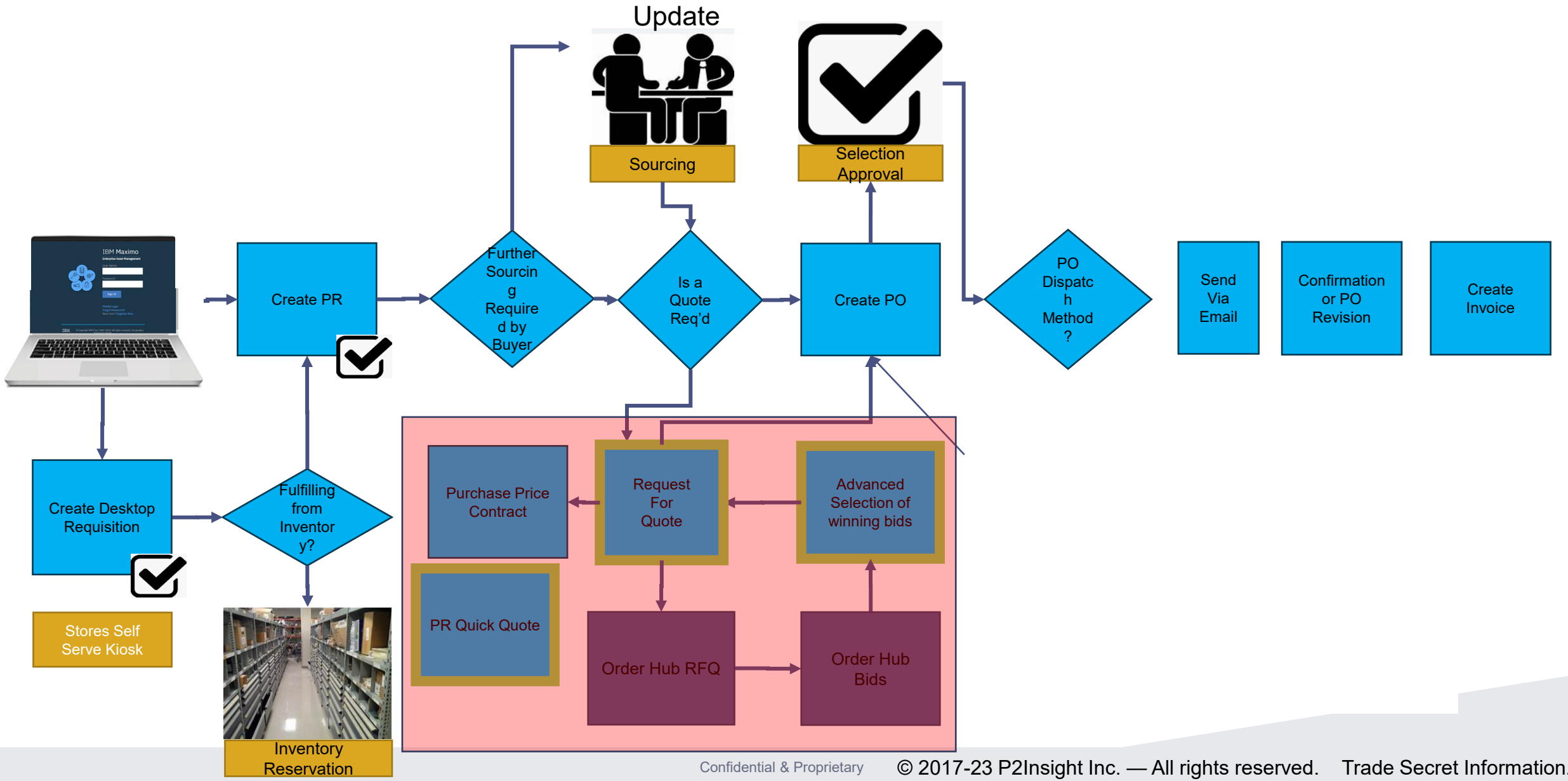
Confidential & Proprietary

# This is base Maximo…

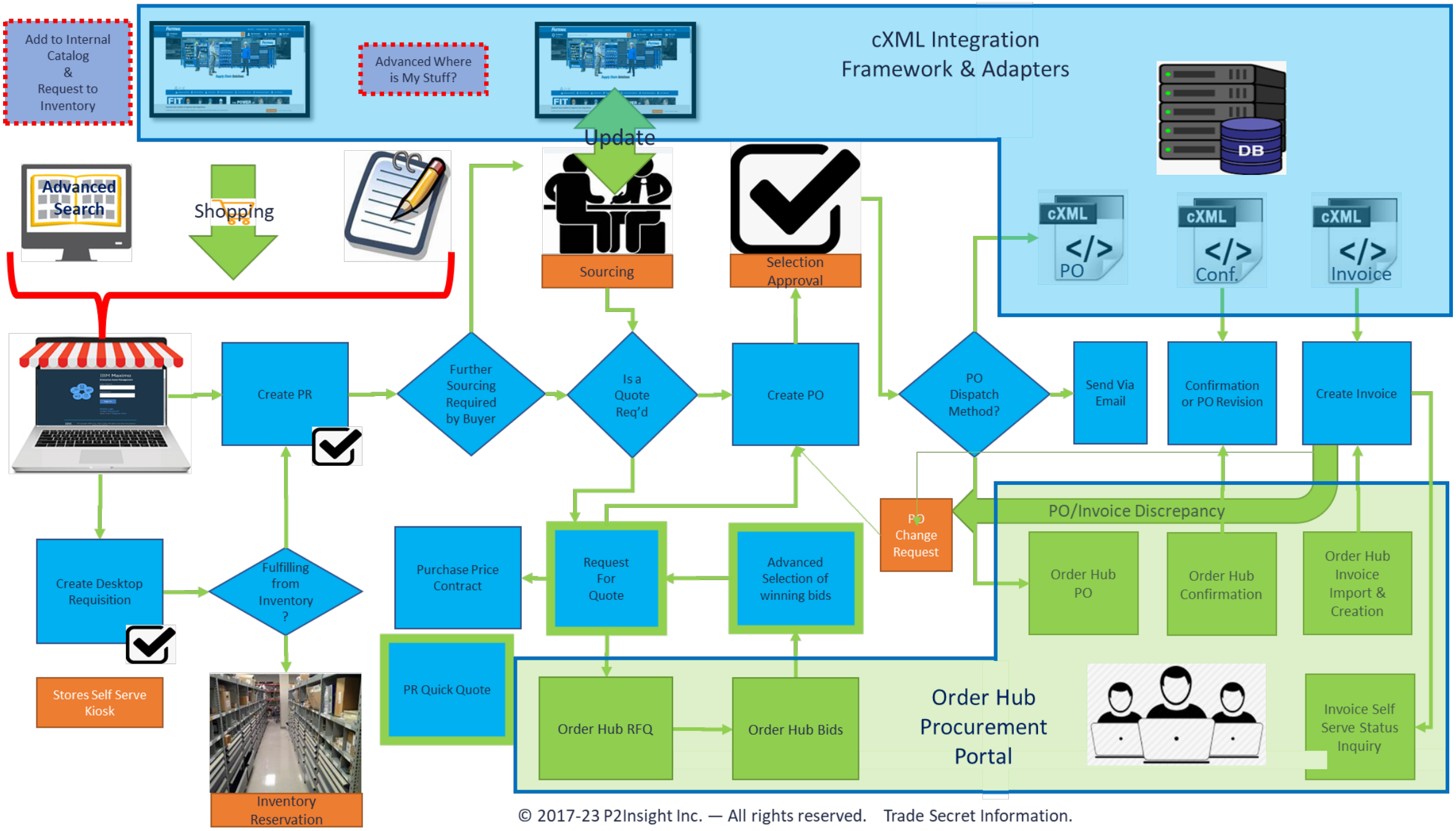



© 2017-23 P2Insight Inc. — All rights reserved. Trade Secret Information.

# OPC Deployment…




Confidential & Proprietary © 2017-23 P2Insight Inc. — All rights reserved. Trade Secret Information.




© 2017-23 P2Insight Inc. — All rights reserved. Trade Secret Information.

Any
Questions

# If More Info Needed

- **Contact Information**
  - Cristy Bennett (General Info) cristy.bennett@opc.com
  - Norris Minnis (Contracts) norris.minnis@opc.com
  - Brad VanNote (Materials) brad.vannote@opc.com
  - Tyler Lyon (IT Maximo Supv) tyler.lyon@gasoc.com

- **P2Insight Contact**
  - Mike Popovic (President) mike.popovic@P2insight.com

CAFE
ADVENTURES
IN
INVENTORY
• SPECIAL AUTHENTIC MENU •

# Greg Morrison

- COBB COUNTY WATER SYSTEM FOR 5 YEARS

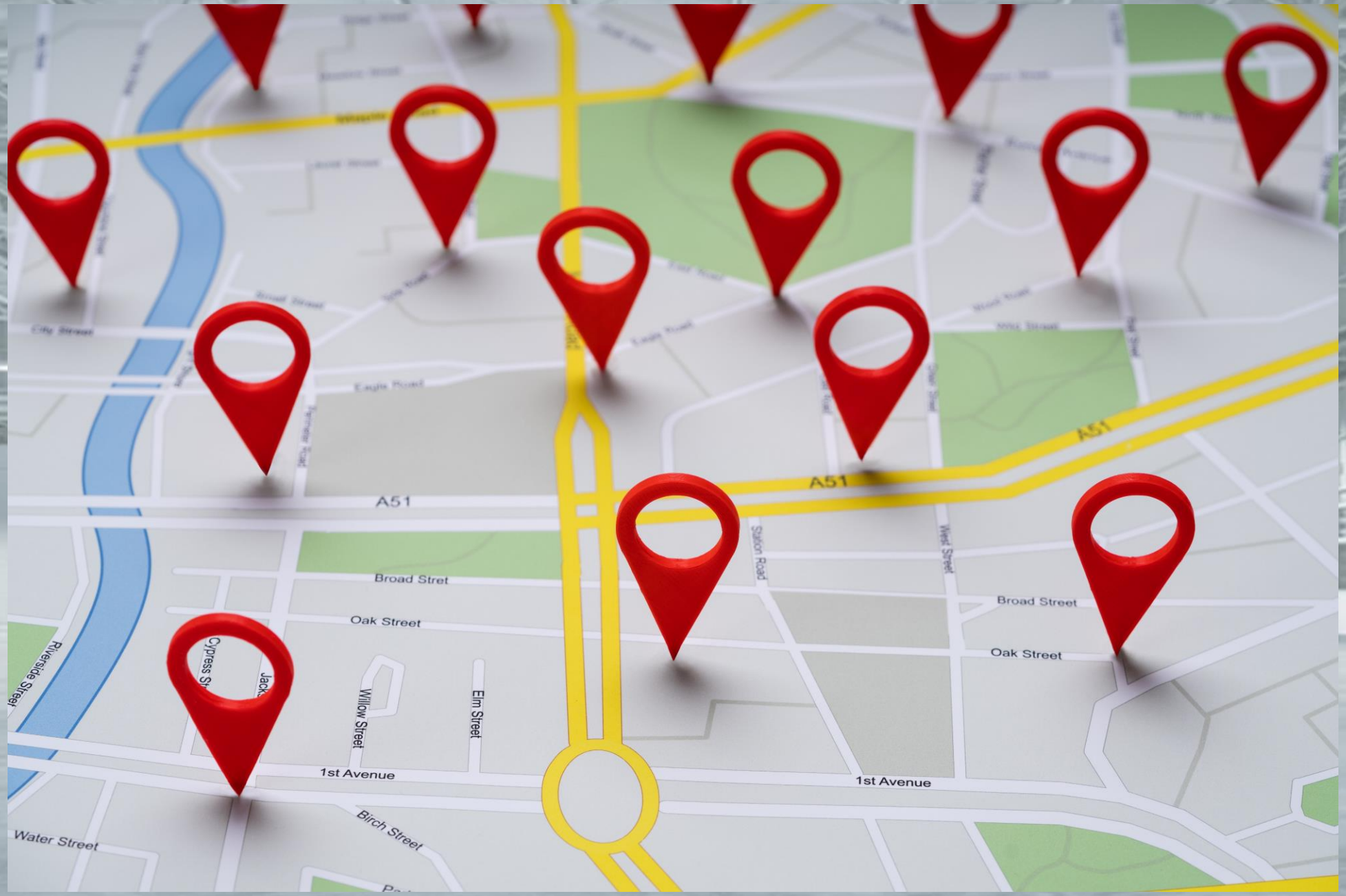
*Cobb County...Expect the Best!*

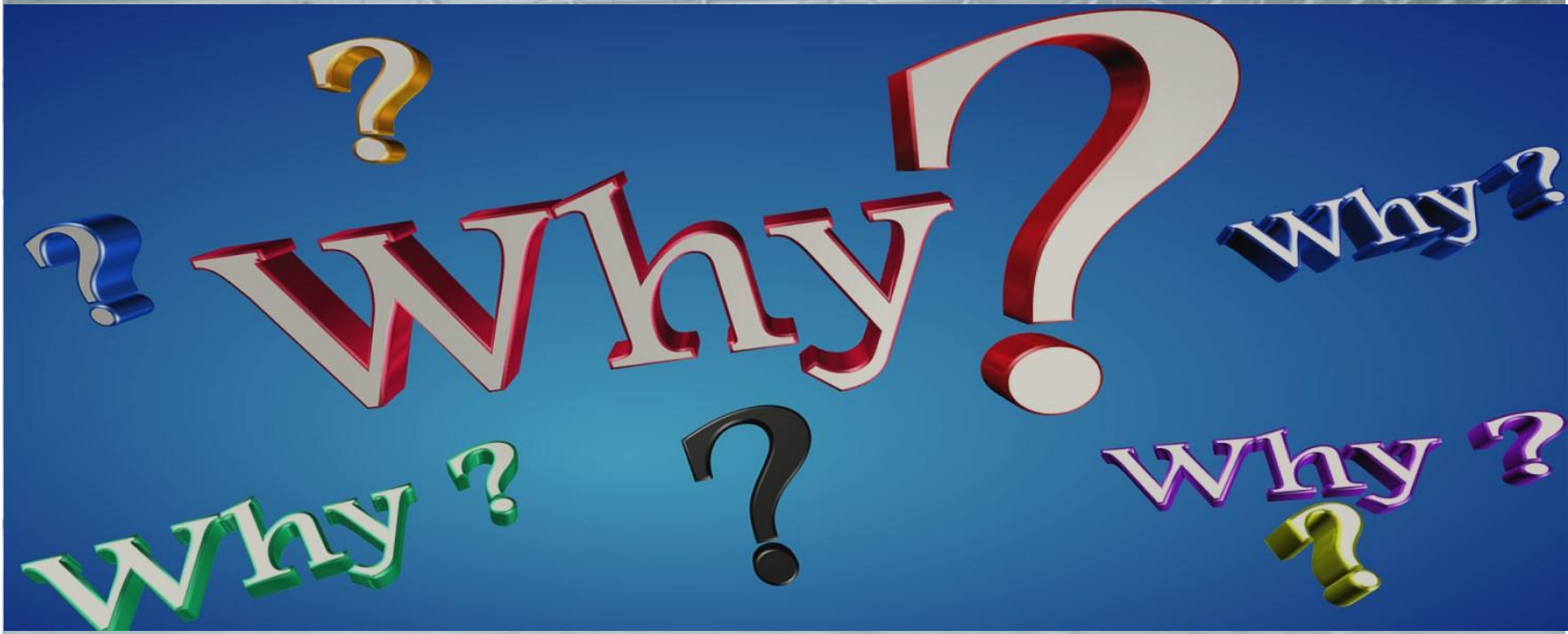
# Greg Morrison

- COBB COUNTY WATER SYSTEM FOR 5 YEARS
- OVER 20 YEARS OF WAREHOUSE EXPERIENCE

*Cobb County...Expect the Best!*

I HAVE ABSOLUTELY
NO IDEA
peacock


A51
A51
A51
Broad Stret
Broad Street
Oak Street
Oak Street
Willow Street
Elm Street
1st Avenue
1st Avenue
Birch Street
Water Street
Eagle Road
Station Road
West Street


Why?
Why?
Why?
Why?
Why?

# WHAT COULD BE GAINED FROM TRACKING INVENTORY???

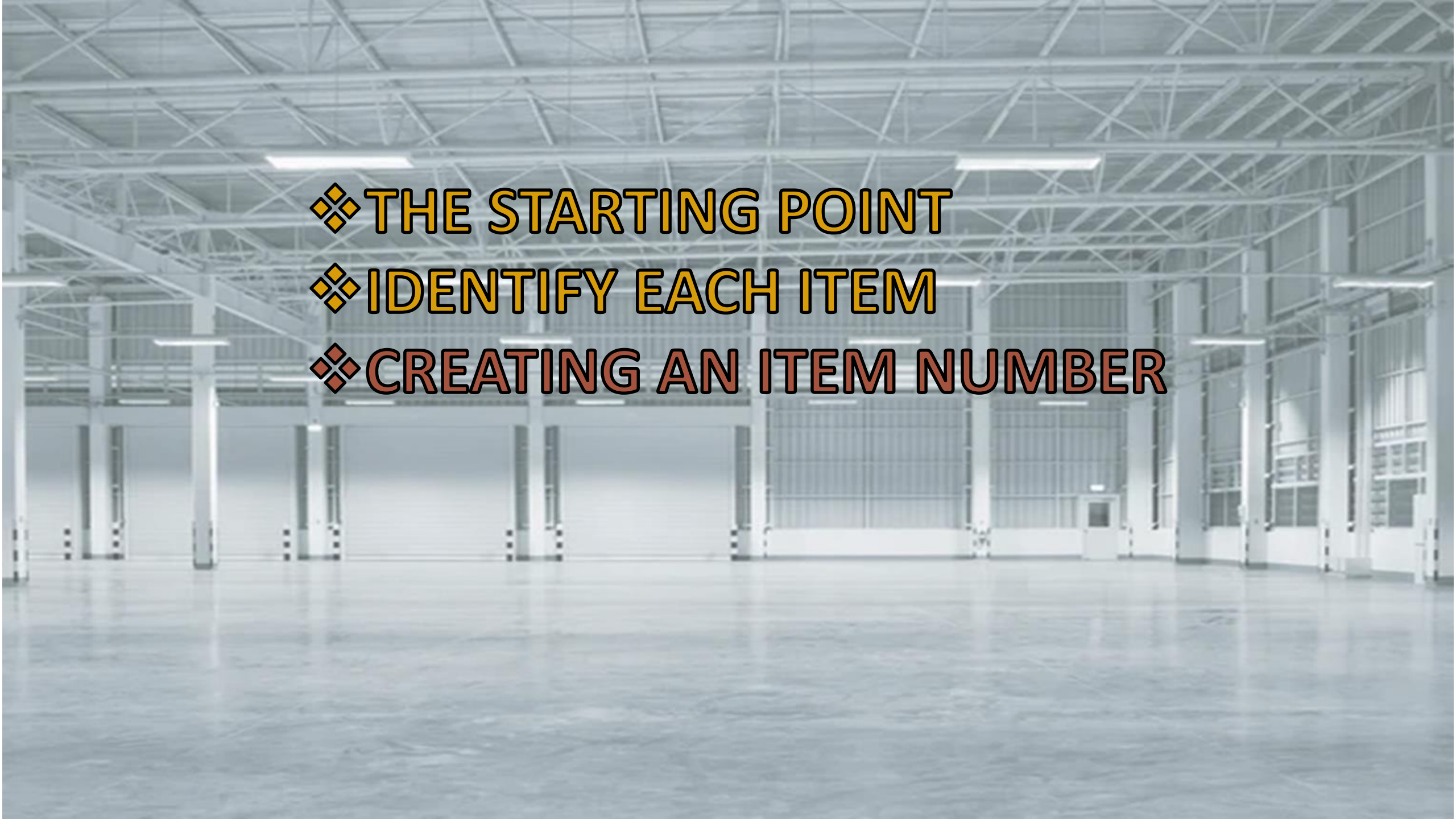
❖THE STARTING POINT
START

❖THE STARTING POINT
❖IDENTIFY EACH ITEM

# PART IDENTIFICATION

| AUDITOR | DATE |
|---|---|
| | |

| STOREROOM | STOREROOM BIN LOCATION | MANUFACTURE/ VENDOR | MANUFACTURE/ VENDOR PART NUMBER | SKU | DESCRIPTION/ SPECIFICATIONS | UNIT OF MEASURE/ PACK | COUNT | ISSUE | END USE/ MISCELLANEOUS | STRUXURE TMP | PART NUMBER | Cycle Count Date | HP | RPM | VOLTS | FRAME | ENCL | AMPS | PHASE |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| NWWRF | | | | | | | | | | | | | | | | | | | |
| NWWRF | | | | | | | | | | | | | | | | | | | |
| NWWRF | | | | | | | | | | | | | | | | | | | |
| NWWRF | | | | | | | | | | | | | | | | | | | |
| NWWRF | | | | | | | | | | | | | | | | | | | |
| NWWRF | | | | | | | | | | | | | | | | | | | |
| NWWRF | | | | | | | | | | | | | | | | | | | |
| NWWRF | | | | | | | | | | | | | | | | | | | |
| NWWRF | | | | | | | | | | | | | | | | | | | |
| NWWRF | | | | | | | | | | | | | | | | | | | |


THE STARTING POINT
IDENTIFY EACH ITEM
CREATING AN ITEM NUMBER

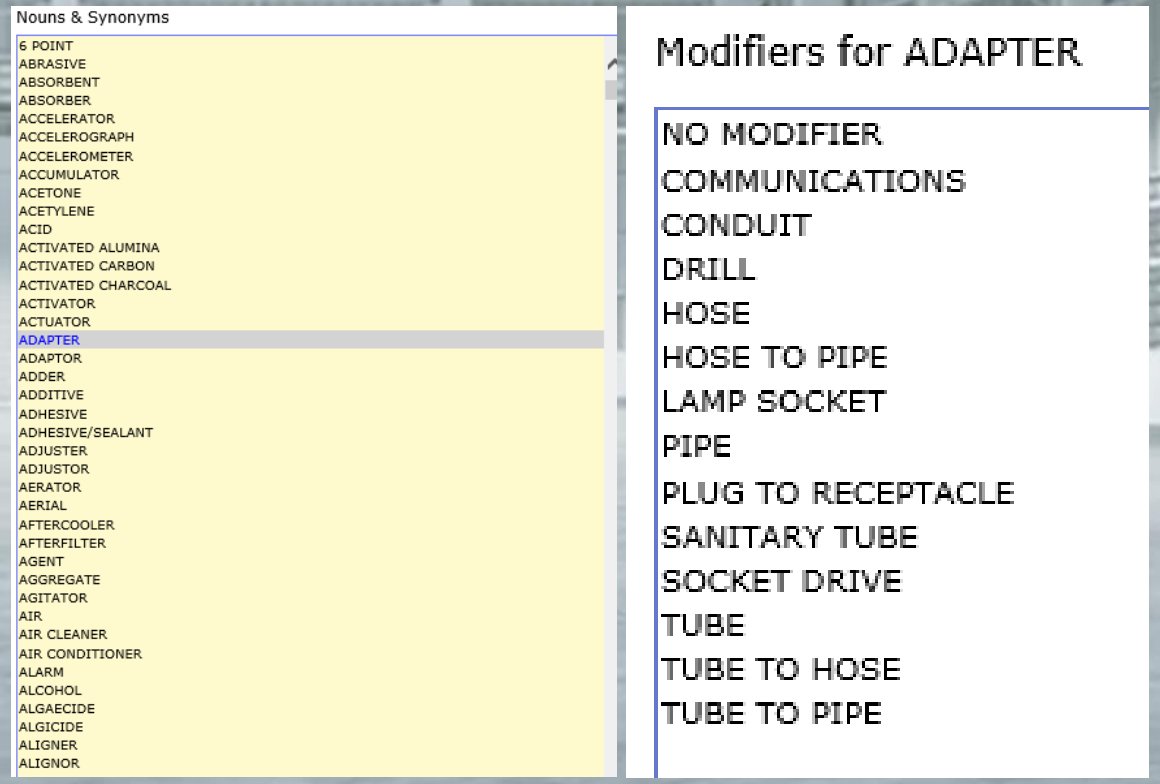
sphera™ Struxure™

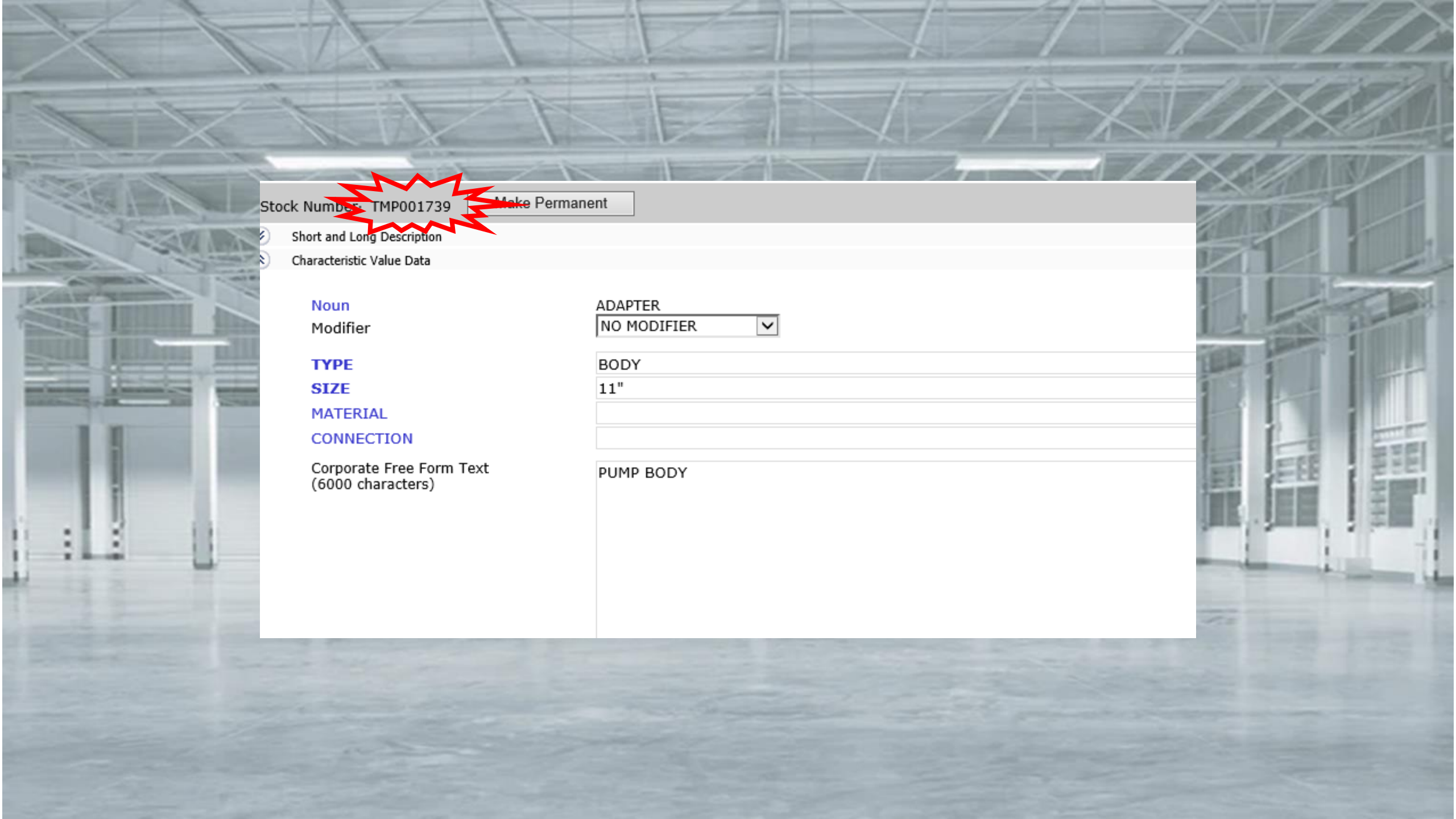
# HERE WE SELECT WHAT THE ITEM IS

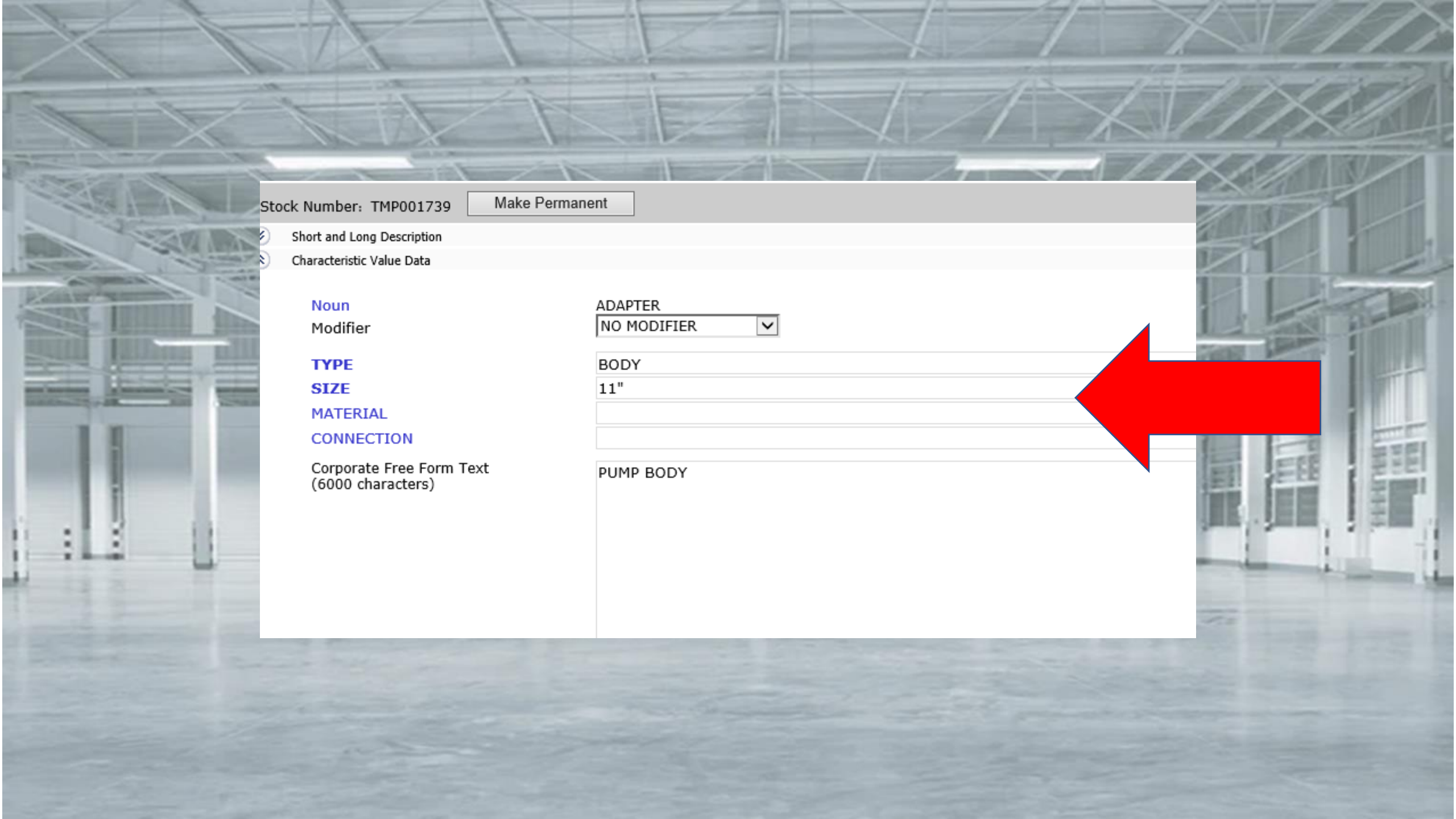
Nouns & Synonyms

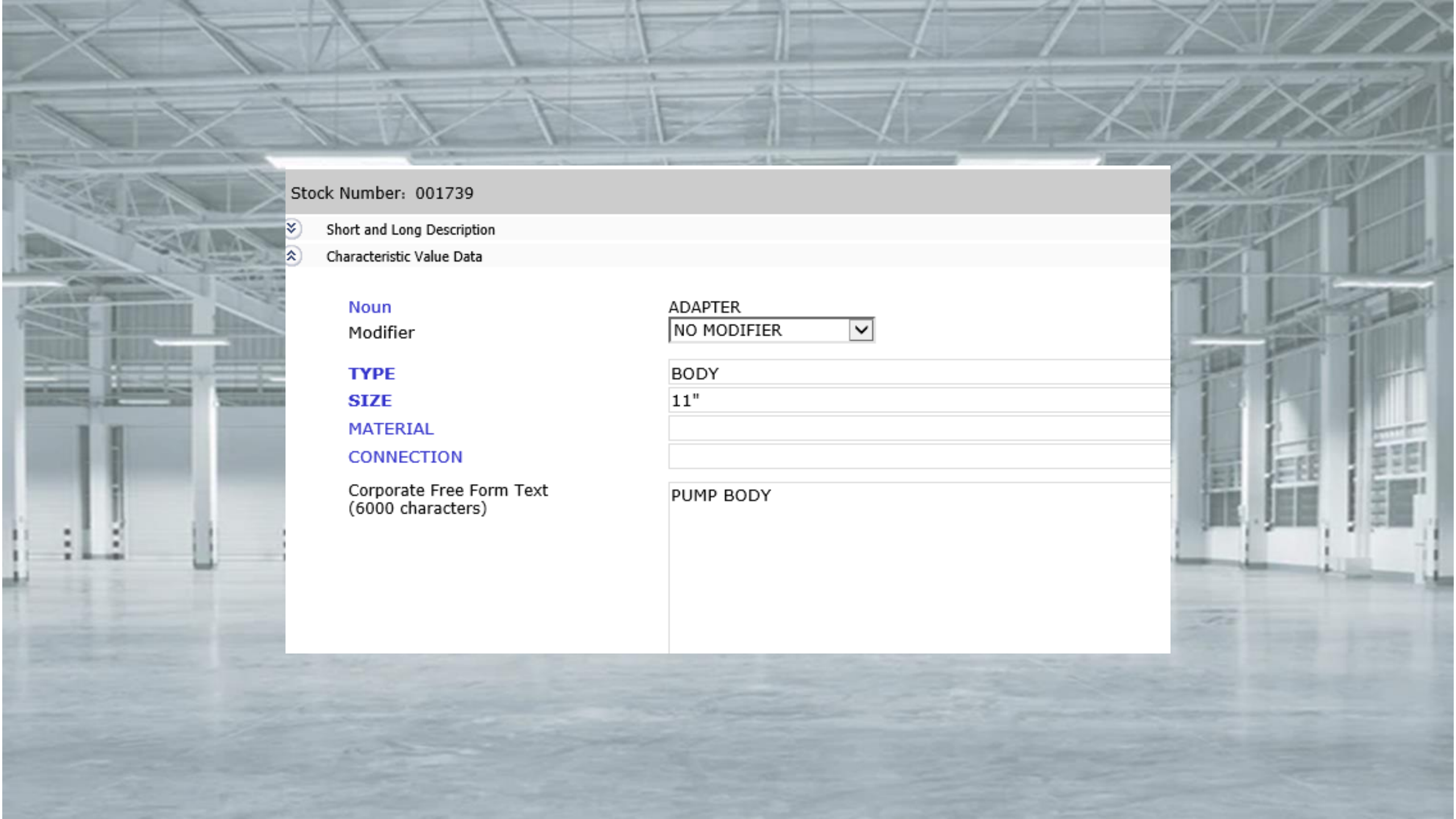
- 6 POINT
- ABRASIVE
- ABSORBENT
- ABSORBER
- ACCELERATOR
- ACCELEROGRAPH
- ACCELEROMETER
- ACCUMULATOR
- ACETONE
- ACETYLENE
- ACID
- ACTIVATED ALUMINA
- ACTIVATED CARBON
- ACTIVATED CHARCOAL
- ACTIVATOR
- ACTUATOR
- ADAPTER
- ADAPTOR
- ADDER
- ADDITIVE
- ADHESIVE
- ADHESIVE/SEALANT
- ADJUSTER
- ADJUSTOR
- AERATOR
- AERIAL
- AFTERCOOLER
- AFTERFILTER
- AGENT
- AGGREGATE
- AGITATOR
- AIR
- AIR CLEANER
- AIR CONDITIONER
- ALARM
- ALCOHOL
- ALGAECIDE
- ALGICIDE
- ALIGNER
- ALIGNOR

# HERE WE SELECT WHAT THE ITEM IS THEN THE MODIFIER IS SELECTED




Stock Number: TMP001739
Make Permanent
Short and Long Description
Characteristic Value Data
Noun
ADAPTER
Modifier
NO MODIFIER
TYPE
BODY
SIZE
11"
MATERIAL
CONNECTION
Corporate Free Form Text
(6000 characters)
PUMP BODY


Stock Number: TMP001739
Make Permanent
Short and Long Description
Characteristic Value Data
Noun
ADAPTER
Modifier
NO MODIFIER
TYPE
BODY
SIZE
11"
MATERIAL
CONNECTION
Corporate Free Form Text
(6000 characters)
PUMP BODY



Stock Number: 001739

Short and Long Description

Characteristic Value Data

| | |
|---|---|
| Noun | ADAPTER |
| Modifier | NO MODIFIER |
| **TYPE** | BODY |
| **SIZE** | 11" |
| MATERIAL | |
| CONNECTION | |
| Corporate Free Form Text (6000 characters) | PUMP BODY |

THE STARTING POINT
IDENTIFY EACH ITEM
CREATING AN ITEM NUMBER
CREATE BIN LOCATION

| | | | | |
|---|---|---|---|---|
| USR-WALL-9 | USR-WALL-10 | USR-WALL-11 | USR-WALL-12 | USR-WALL-13 |
| USR-WALL-8 | | | | |
| USR-WALL-7 | | USR-A-1 | USR-A-2 | USR-A-3 |
| USR-WALL-6 | | USR-B-1 | USR-B-2 | USR-B-3 |
| USR-WALL-5 | | | | |
| USR-WALL-4 | | USR-C-1 | USR-C-2 | USR-C-3 |
| USR-WALL-3 | | USR-D-1 | USR-D-2 | USR-D-3 |
| USR-WALL-2 | | | | |
| USR-WALL-1 | | USR-WALL-14 | USR-WALL-15 | USR-WALL-16 |

| USR-A-1 | USR-A-2 | USR-A-3 |
| --- | --- | --- |
| USR-A-1-D | USR-A-2-D | USR-A-3-D |
| USR-A-1-C | USR-A-2-C | USR-A-3-C |
| USR-A-1-B | USR-A-2-B | USR-A-3-B |
| USR-A-1-A | USR-A-2-A | USR-A-3-A |

- THE STARTING POINT
- IDENTIFY EACH ITEM
- CREATING AN ITEM NUMBER
- CREATE BIN LOCATION
- LABELING BIN LOCATIONS AND ITEMS

BarTender®
BY SEAGULL SCIENTIFIC

DEW-A-4-A-1A

USR-A-1-E-1
USR-A-1-E-2
USR-A-1-E-3
USR-A-1-E-4
USR-A-1-E-5
USR-A-1-E-6
USR-A-1-D-1
USR-A-1-D-2
USR-A-1-D-3
USR-A-1-D-4
USR-A-1-D-5
USR-A-1-C-1
USR-A-1-C-2
USR-A-1-C-3
OIL SEAL

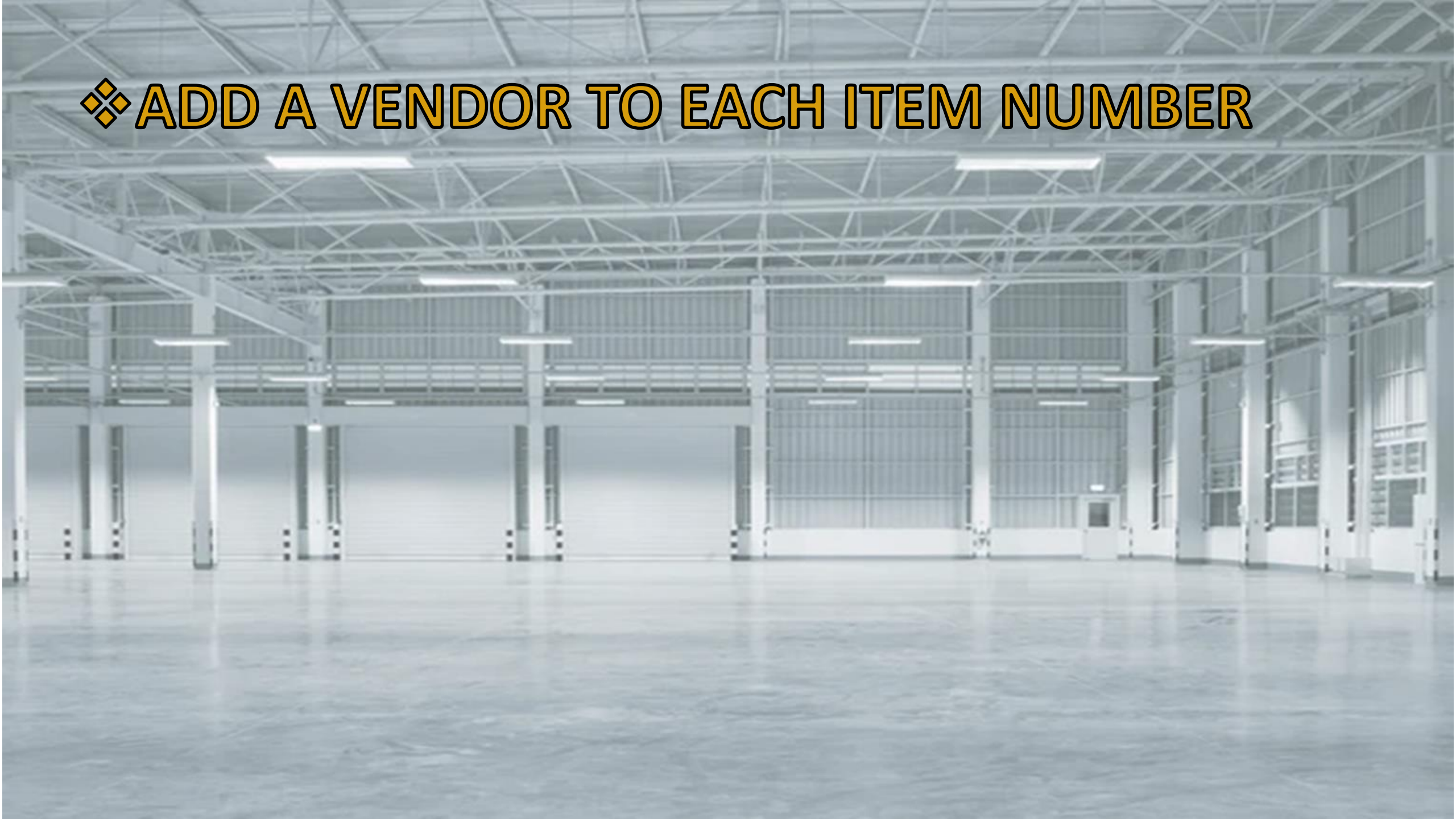
LSR-M-3-K-1
NTN 004613
ROLLER BEARING
33017U
LSR-M-3-K-2
LSR-M-3-K-3
LSR-M-3-J-1
SKF 008205
BALL BEARING
3205 A-2RS1
LSR-M-3-J-2
SKF 001514
ROLLER BEARING
3305 ATN9/C3
LSR-M-3-J-3
SKF 004580
BALL BEARING
3305 A-2Z/C3
LSR-M-3-I-1
SKF 004570
BALL BEARING
5305A-2Z/C3
LSR-M-3-I-2
SKF 001591
BALL BEARING
5306A
LSR-M-3-I-3
MRC 004575
BALL BEARING
5306C
LSR-M-3-H-1
SKF 004555
BALL BEARING
6308-Z/C3
LSR-M-3-H-2
NACHI 004556
BALL BEARING
6203NSE
LSR-M-3-H-3
BEAR. LIMIT 004557
BALL BEARING
6205 ZZ/C3
LSR-M-3-H-4
LSR-M-3-G-1
SKF 004546
BALL BEARING
6208-Z/C3
LSR-M-3-G-2
SKF 004548
BALL BEARING
6208 2RSJEM
LSR-M-3-G-3
SKF 004549
BALL BEARING
6208 NR/C3

003453
REDUCER: PUMP
DEW-A-4-E-1A
003452
SHAFT, PUMP
DEW-A-4-E-1B
003469
SEAL: GREASE
DEW-A-4-E-1C
003468
BEARING, BALL
DEW-A-4-E-1D
003464
BEARING, BALL
DEW-A-4-E-1E
003456
MATERIAL: PACKING
DEW-A-4-E-1F
003454
KIT: BEARING
DEW-A-4-E-2A
003455
COVER: BEARING
DEW-A-4-E-2B
003470
GLAND, PACKING
DEW-A-4-E-2C
003460
COLLAR: SHAFT
DEW-A-4-E-2D
003458
ROD: CONNECTING
DEW-A-4-E-2E
003462
WASHER: CONNECTIN
DEW-A-4-E-2F
003466
PIN:SHAFT
DEW-A-4-E-3A
003459
SPACER:BEARING
DEW-A-4-E-3B
003463
SEAL: GREASE
DEW-A-4-E-3C
003465
ROTOR:PIN
DEW-A-4-E-3D
003467
SCREW:DRIVE
DEW-A-4-E-3E
003461
WASHER:RETAINING
DEW-A-4-E-3F
TMP005346
BUSHING, DRIVE
DEW-A-4-F-1A
TMP005347
SHAFT, GEAR
DEW-A-4-F-2A
003153
SPROCKET:MARTIN SLU
DEW-A-4-F-3A

REDUCER: PUMP
003453
DEW-A-4-E-1A
SHAFT, PUMP
003452
DEW-A-4-E-1B
SEAL: GREASE
003469
DEW-A-4-E-1C
BEARING, BALL
003468
DEW-A-4-E-1D
BEARING, BALL
003464
DEW-A-4-E-1E
MATERIAL: PACKING
003456
DEW-A-4-E-1F
KIT: BEARING
003454
DEW-A-4-E-2A
COVER: BEARING
003455
DEW-A-4-E-2B
GLAND, PACKING
003470
DEW-A-4-E-2C
COLLAR: SHAFT
003460
DEW-A-4-E-2D
ROD: CONNECTING
003458
DEW-A-4-E-2E
WASHER: CONNECTIN
003462
DEW-A-4-E-2F
PIN:SHAFT
003466
DEW-A-4-E-3A
SPACER:BEARING
003459
DEW-A-4-E-3B
SEAL: GREASE
003463
DEW-A-4-E-3C
ROTOR:PIN
003465
DEW-A-4-E-3D
SCREW:DRIVE
003467
DEW-A-4-E-3E
WASHER:RETAINING
003461
DEW-A-4-E-3F
BUSHING, DRIVE
TMP005346
DEW-A-4-F-1A
SHAFT, GEAR
TMP005347
DEW-A-4-F-2A
SPROCKET:MARTIN SLU
003153
DEW-A-4-F-3A

REDUCER: PUMP
003453
DEW-A-4-E-1A
SHAFT, PUMP
003452
DEW-A-4-E-1B
SEAL: GREASE
003469
DEW-A-4-E-1C
BEARING, BALL
003468
DEW-A-4-E-1D
BEARING, BALL
003464
DEW-A-4-E-1E
MATERIAL: PACKING
003456
DEW-A-4-E-1F
KIT: BEARING
003454
DEW-A-4-E-2A
COVER: BEARING
003455
DEW-A-4-E-2B
GLAND, PACKING
003470
DEW-A-4-E-2C
COLLAR: SHAFT
003460
DEW-A-4-E-2D
ROD: CONNECTING
003458
DEW-A-4-E-2E
WASHER: CONNECTIN
003462
DEW-A-4-E-2F
PIN:SHAFT
003466
DEW-A-4-E-3A
SPACER:BEARING
003459
DEW-A-4-E-3B
SEAL: GREASE
003463
DEW-A-4-E-3C
ROTOR:PIN
003465
DEW-A-4-E-3D
SCREW:DRIVE
003467
DEW-A-4-E-3E
WASHER:RETAINING
003461
DEW-A-4-E-3F
BUSHING, DRIVE
TMP005346
DEW-A-4-F-1A
SHAFT, GEAR
TMP005347
DEW-A-4-F-2A
SPROCKET:MARTIN SLU
003153
DEW-A-4-F-3A

NEXT STEP


❖ADD A VENDOR TO EACH ITEM NUMBER

List View | Inventory | Reorder Details | Rotating Assets | Where Used

Item: 009040 > TRANSMITTER,LIQUID LEVEL:4-20MA,240VAC SUPPLY,PANEL M  Site: WATER

Storeroom: SOUTHCOBB > SOUTH COBB WRF GENERAL

## Reorder Details

Reorder? ☑

**Reorder Point:** 0.00

**Lead Time (Days):** 0

Safety Stock:

**Economic Order Quantity:** 1.00

Order Unit: EA

## Primary Vendor

Primary Vendor: 1146 > BESTECH ENVIRONMENTAL RES

Manufacturer: 12813 > PULSAR INC

Model: 1744110002XX

Catalog #: 1744110002XX

Internal? ☐

Storeroom:

Storeroom Site:

## Vendors

Filter > 1 - 1 of 1

| Vendor | Manufacturer | Model | Catalog # | Order Unit | Last Price | Last Order Date | Organization | Site |
|---|---|---|---|---|---|---|---|---|
| 1146 | 12813 | 1744110002XX | 1744110002XX | EA | 1,255.00 | 3/27/23 | COBBGOV | WATER |

New Row

List View | Inventory | Reorder Details | Rotating Assets | Where Used

Item: 008734 › KIT,O-RING  Site: WATER

Storeroom: SOUTHCOBB › SOUTH COBB WRF GENERAL

## Reorder Details

Reorder? ☑

**Reorder Point:** 0.00

**Lead Time (Days):** 0

Safety Stock:

**Economic Order Quantity:** 1.00

Order Unit: EA

## Primary Vendor

Primary Vendor: VS0000013933 › TEKWELL SERVICES

Internal? ☐

Manufacturer: ›

Model: RK114-375R

Catalog #: RK114-375R

Storeroom:

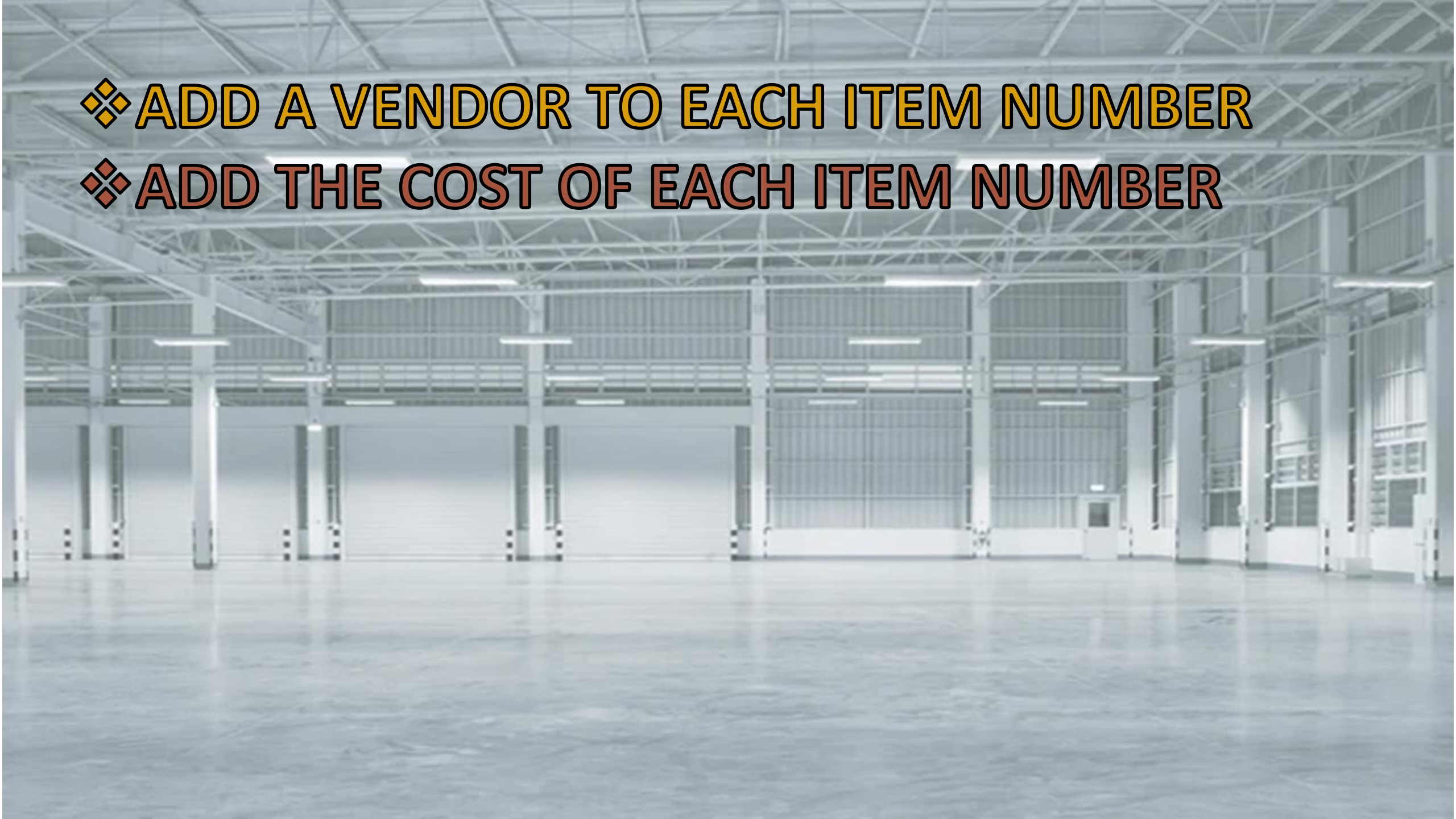
Storeroom Site:

## Vendors

Filter › | 1 - 2 of 2

| Vendor | Manufacturer | Model | Catalog # | Order Unit | Last Price | Last Order Date | Organization | Site |
|---|---|---|---|---|---|---|---|---|
| 5596 | | RK114-375R | 6CUP1 | EA | 78.77 | 3/11/22 | COBBGOV | WATER |
| VS000001393 | | RK114-375R | RK114-375R | EA | 66.34 | 2/13/23 | COBBGOV | WATER |

New Row


❖ADD A VENDOR TO EACH ITEM NUMBER
❖ADD THE COST OF EACH ITEM NUMBER

List View | Inventory | Reorder Details | Rotating Assets | Where Used

Item: 008734 › KIT,O-RING

Storeroom: SOUTHCOBB › SOUTH COBB WRF GENERAL

Inventory Org:

Lot Type: NOLOT

Issue Cost Type: STANDARD

Receipt Tolerance %:

Critical? ☐

Site: WATER

Status: ACTIVE

Default Bin: LSR-L-8-G-2

Default Stage Bin:

Capitalized? ☐

Kit? ☐

Adjust Current Balance

Attachments

*Issue Unit: EA

Condition Enabled? ☐

Rotating? ☐

Consignment? ☐

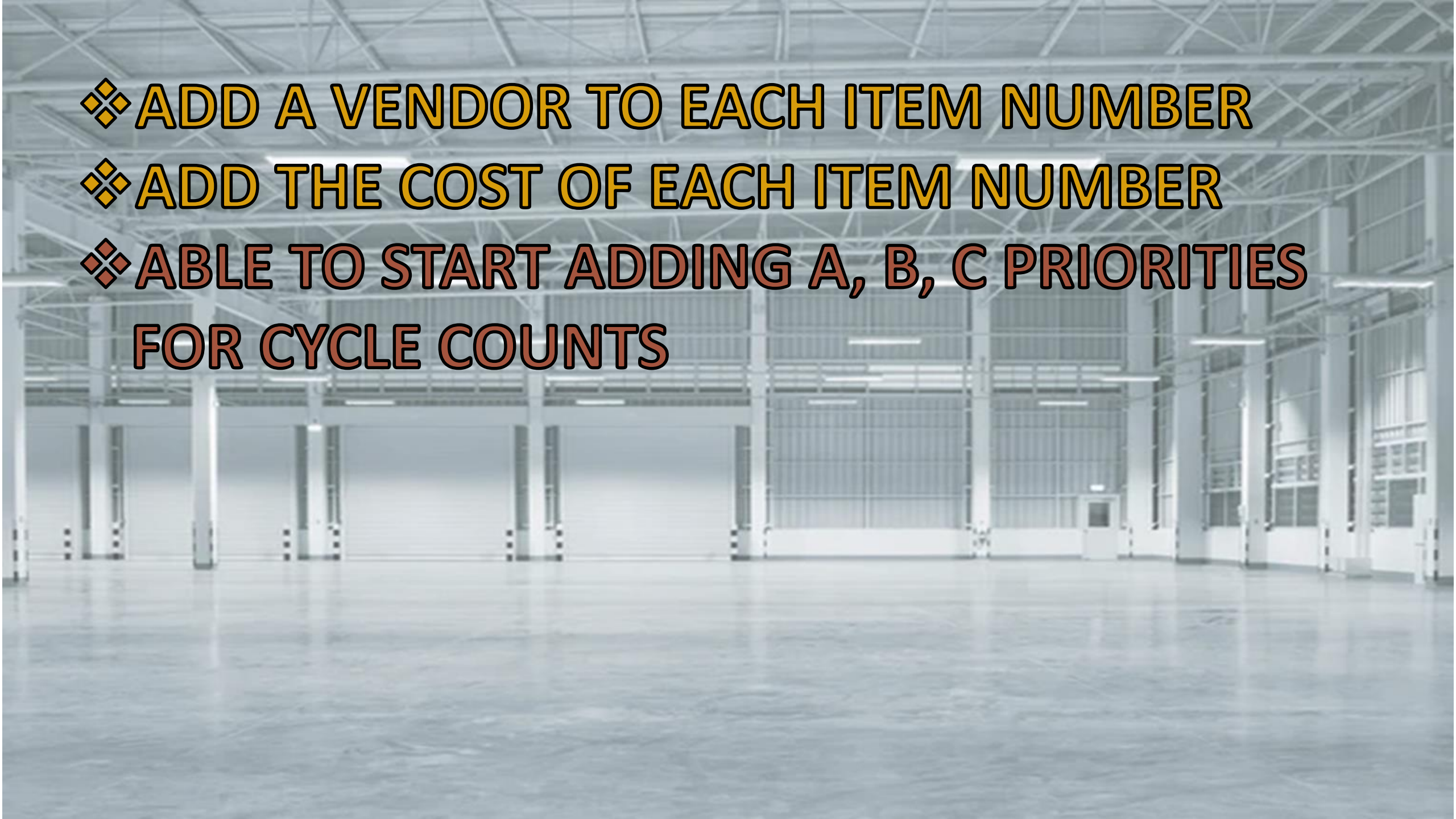
Requires hard reservation on use? ☐

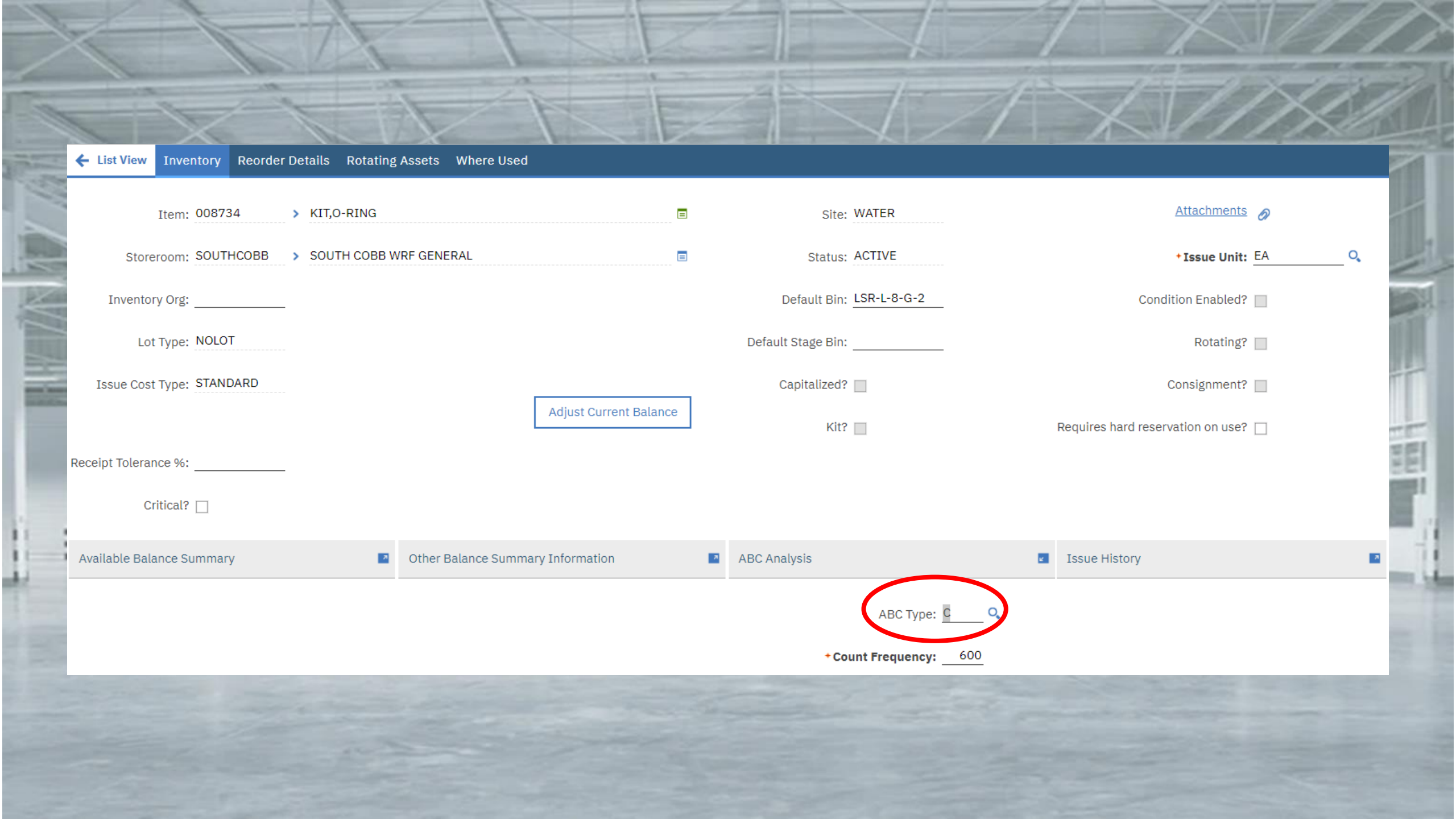
Available Balance Summary | Other Balance Summary Information | ABC Analysis | Issue History

Inventory Costs | Filter | 1 - 1 of 1

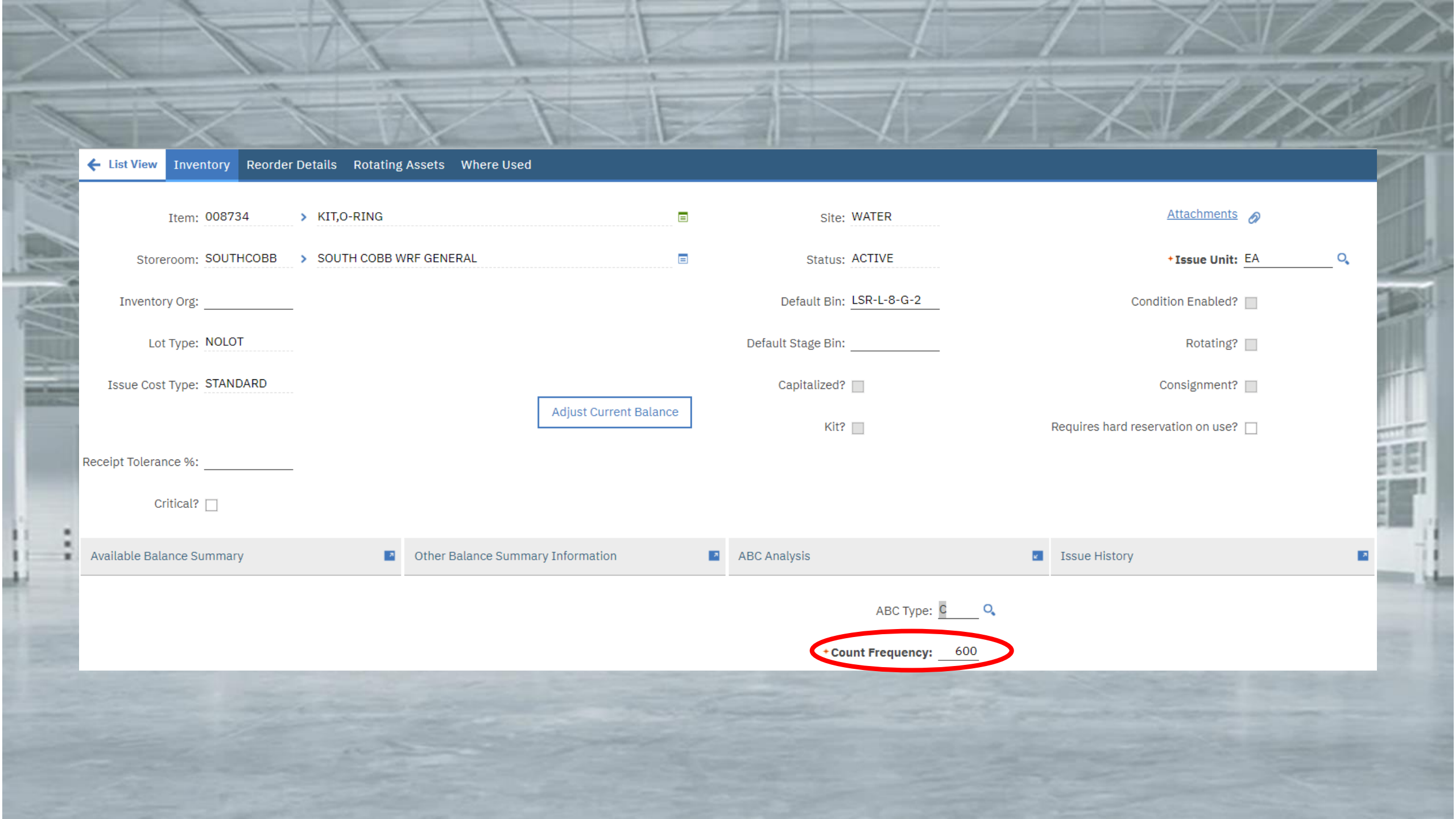
| Condition Code | Description | Condition Rate | Standard Cost | Average Cost | Last Receipt Cost |
|---|---|---|---|---|---|
| | | 100 | 66.34 | 33.17 | 66.34 |

New Row

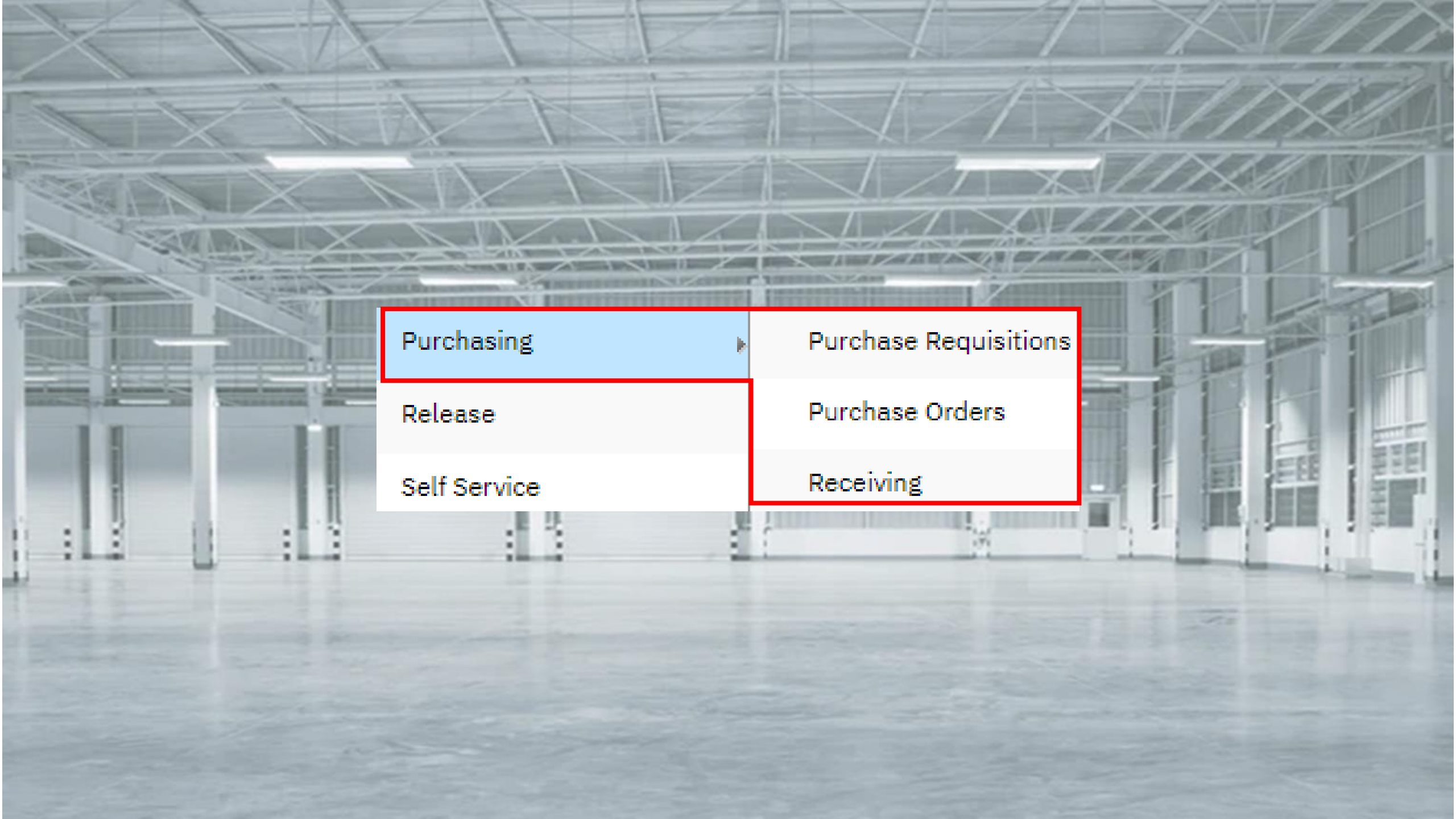

❖ADD A VENDOR TO EACH ITEM NUMBER
❖ADD THE COST OF EACH ITEM NUMBER
❖ABLE TO START ADDING A, B, C PRIORITIES FOR CYCLE COUNTS


List View
Inventory
Reorder Details
Rotating Assets
Where Used
Item: 008734 KIT,O-RING
Storeroom: SOUTHCOBB SOUTH COBB WRF GENERAL
Inventory Org:
Lot Type: NOLOT
Issue Cost Type: STANDARD
Receipt Tolerance %:
Critical?
Adjust Current Balance
Site: WATER
Status: ACTIVE
Default Bin: LSR-L-8-G-2
Default Stage Bin:
Capitalized?
Kit?
Attachments
Issue Unit: EA
Condition Enabled?
Rotating?
Consignment?
Requires hard reservation on use?
Available Balance Summary
Other Balance Summary Information
ABC Analysis
Issue History
ABC Type: C
Count Frequency: 600

- ADD A VENDOR TO EACH ITEM NUMBER
- ADD THE COST OF EACH ITEM NUMBER
- ABLE TO START ADDING A, B, C PRIORITIES FOR CYCLE COUNT
- SET UP CYCLE COUNT DATES TO HELP KEEP INVENTORY CORRECT


List View
Inventory
Reorder Details
Rotating Assets
Where Used
Item: 008734 KIT,O-RING
Storeroom: SOUTHCOBB SOUTH COBB WRF GENERAL
Inventory Org:
Lot Type: NOLOT
Issue Cost Type: STANDARD
Receipt Tolerance %:
Critical?
Site: WATER
Status: ACTIVE
Default Bin: LSR-L-8-G-2
Default Stage Bin:
Capitalized?
Kit?
Adjust Current Balance
Attachments
Issue Unit: EA
Condition Enabled?
Rotating?
Consignment?
Requires hard reservation on use?
Available Balance Summary
Other Balance Summary Information
ABC Analysis
Issue History
ABC Type: C
Count Frequency: 600

- ADD A VENDOR TO EACH ITEM NUMBER
- ADD THE COST OF EACH ITEM NUMBER
- ABLE TO START ADDING A, B, C PRIORITIES FOR CYCLE COUNT
- SET UP CYCLE COUNT DATES TO HELP KEEP INVENTORY CORRECT
- ABLE TO RECEIVE ITEMS IN MAXIMO


Purchasing
Release
Self Service
Purchase Requisitions
Purchase Orders
Receiving

- ADD A VENDOR TO EACH ITEM NUMBER
- ADD THE COST OF EACH ITEM NUMBER
- ABLE TO START ADDING A, B, C PRIORITIES FOR CYCLE COUNT
- SET UP CYCLE COUNT DATES TO HELP KEEP INVENTORY CORRECT
- ABLE TO RECEIVE ITEMS IN MAXIMO
- ADD ITEMS TO WORK ORDERS

Labor | Materials | Services | Tools

Materials | Filter | 1 - 6 of 28

| Task | Item | Description | Transaction Type | Storeroom | Quantity | Bin |
|---|---|---|---|---|---|---|
| | 001582 | BEARING,BALL:ANGULAR CONTACT,SIN | ISSUE | SOUTHCOBB | 2.00 | LSR-H-1-E-2-A |
| | 004332 | BEARING,ROLLER:SPHERICAL,DOUBLE | ISSUE | SOUTHCOBB | 1.00 | LSR-C-1-B-5-A |
| | 004327 | SHIELD:GREASE | ISSUE | SOUTHCOBB | 1.00 | LSR-C-1-B-1-I |
| | 004438 | SEAL,OIL:SINGLE LIP WITH SPRING SH | ISSUE | SOUTHCOBB | 1.00 | LSR-H-3-H-6 |
| | 004427 | SEAL,OIL:SINGLE LIP WITHOUT SPRIN | ISSUE | SOUTHCOBB | 1.00 | LSR-H-3-F-5 |
| | 004339 | RING,RETAINING:316 SS | ISSUE | SOUTHCOBB | 1.00 | LSR-C-1-C-2 |

## Details

Task:
Item: 001582 BEARING,BALL:ANGULAR CONTACT,SINGLE ROW,75MM ID,160
Line Type: Item
Storeroom: SOUTHCOBB
Site: WATER
Quantity: 2.00
Unit Cost: 358.68
Line Cost: 717.36
Bin: LSR-H-1-E-2-A

Lot:
Expiration Date:
Lot Type: NOLOT
Condition Code:
Rate Percentage: 100
Condition Enabled?
Stock Category: STK
Entered By: RICHAF031804
Actual Date: 4/3/23 8:04 AM

## Charge Information

Requisition:
Requisition Line:
Location: SSWRFSC4005 PUMP ASSEMBLY, RAS, 8.0, SCWRF, SECONDTREAT, SC-P4248
Asset: SSWRFSC40( MOTOR, RASPUMP8, SCWRF, SECONDTREAT, INVERTER DUTY M
Rotating Asset:

GL Debit Account: 500-500-5240-
GL Credit Account: 500-500-5220-
Transaction Type: ISSUE
Outside?
Issued To: GILLCR0327!
Scrap:

Select Materials | Select Reserved Items | Select Asset Spare Parts | New Row

- ADD A VENDOR TO EACH ITEM NUMBER
- ADD THE COST OF EACH ITEM NUMBER
- ABLE TO START ADDING A, B, C PRIORITIES FOR CYCLE COUNT
- SET UP CYCLE COUNT DATES TO HELP KEEP INVENTORY CORRECT
- ABLE TO RECEIVE ITEMS IN MAXIMO
- ADD ITEMS TO WORK ORDERS
  - THIS ALLOWS US TO TRACK REPAIR COST TO ASSETS

- ADD A VENDOR TO EACH ITEM NUMBER
- ADD THE COST OF EACH ITEM NUMBER
- ABLE TO START ADDING A, B, C PRIORITIES FOR CYCLE COUNT
- SET UP CYCLE COUNT DATES TO HELP KEEP INVENTORY CORRECT
- ABLE TO RECEIVE ITEMS IN MAXIMO
- ADD ITEMS TO WORK ORDERS
  - THIS ALLOWS US TO TRACK REPAIR COST TO ASSETS
  - CREATES A SPARE PARTS LIST FOR THE ASSET

Labor | Materials | Services | Tools

Materials | Filter | 1 - 6 of 28

| Task | Item | Description | Transaction Type | Storeroom | Quantity | Bin |
|---|---|---|---|---|---|---|
| | 001582 | BEARING,BALL:ANGULAR CONTACT,SIN | ISSUE | SOUTHCOBB | 2.00 | LSR-H-1-E-2-A |
| | 004332 | BEARING,ROLLER:SPHERICAL,DOUBLE | ISSUE | SOUTHCOBB | 1.00 | LSR-C-1-B-5-A |
| | 004327 | SHIELD:GREASE | ISSUE | SOUTHCOBB | 1.00 | LSR-C-1-B-1-I |
| | 004438 | SEAL,OIL:SINGLE LIP WITH SPRING SH | ISSUE | SOUTHCOBB | 1.00 | LSR-H-3-H-6 |
| | 004427 | SEAL,OIL:SINGLE LIP WITHOUT SPRIN | ISSUE | SOUTHCOBB | 1.00 | LSR-H-3-F-5 |
| | 004339 | RING,RETAINING:316 SS | ISSUE | SOUTHCOBB | 1.00 | LSR-C-1-C-2 |

Details

Task:
Item: 001582 BEARING,BALL:ANGULAR CONTACT,SINGLE ROW,75MM ID,160
Line Type: Item
Storeroom: SOUTHCOBB
Site: WATER
Quantity: 2.00
Unit Cost: 358.68
Line Cost: 717.36
Bin: LSR-H-1-E-2-A

Lot:
Expiration Date:
Lot Type: NOLOT
Condition Code:
Rate Percentage: 100
Condition Enabled?
Stock Category: STK
Entered By: RICHAF031804
Actual Date: 4/3/23 8:04 AM

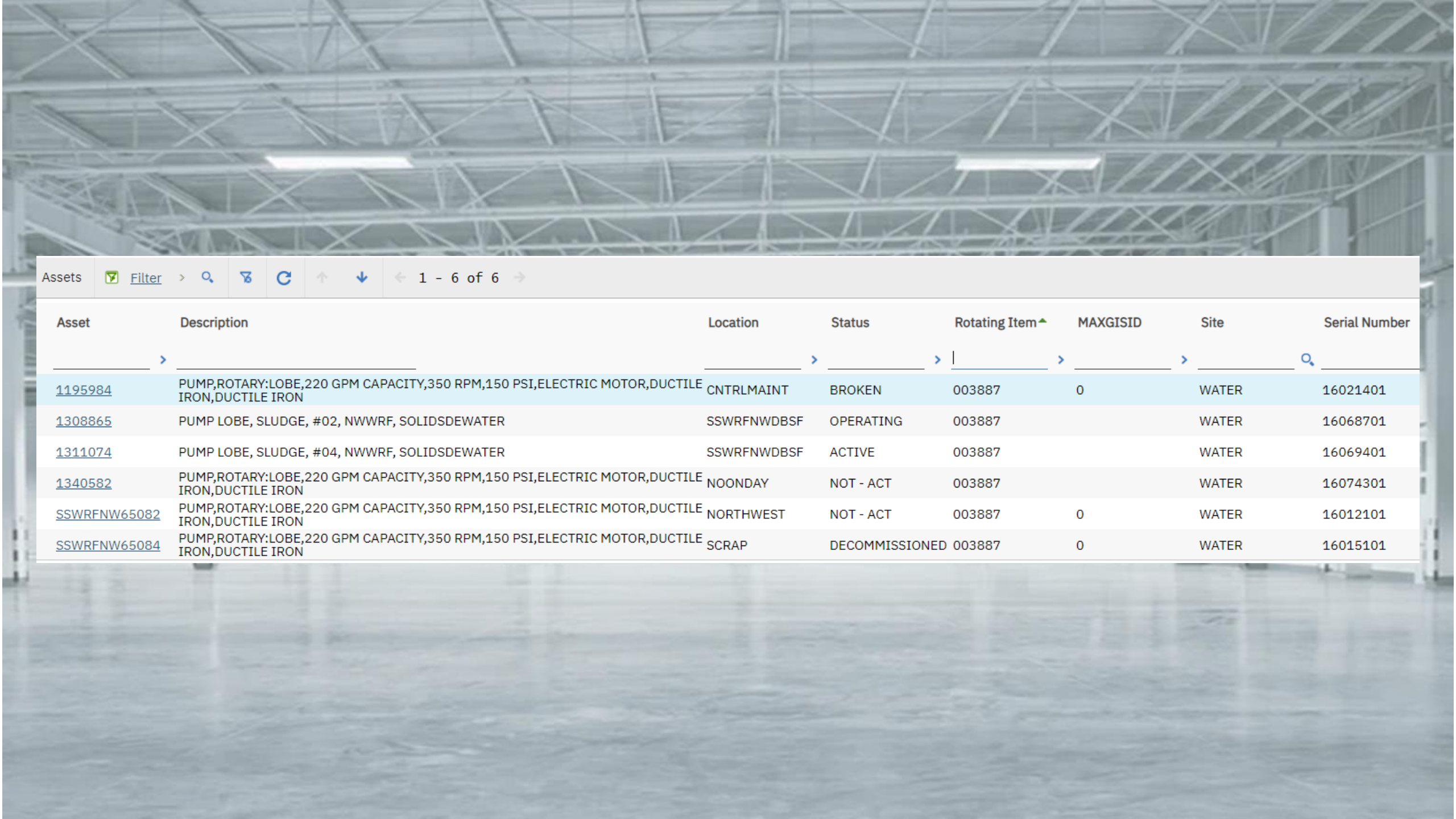
Charge Information

Requisition:
Requisition Line:
Location: SSWRFSC40058 PUMP ASSEMBLY, RAS, 8.0, SCWRF, SECONDTREAT, SC-P4248
Asset: SSWRFSC400 MOTOR, RASPUMP8, SCWRF, SECONDTREAT, INVERTER DUTY M
Rotating Asset:

GL Debit Account: 500-500-5240-
GL Credit Account: 500-500-5220-
Transaction Type: ISSUE
Outside?
Issued To: GILLCR0327!
Scrap:

Select Materials | Select Reserved Items | Select Asset Spare Parts | New Row

- ADD A VENDOR TO EACH ITEM NUMBER
- ADD THE COST OF EACH ITEM NUMBER
- ABLE TO START ADDING A, B, C PRIORITIES FOR CYCLE COUNT
- SET UP CYCLE COUNT DATES TO HELP KEEP INVENTORY CORRECT
- ABLE TO RECEIVE ITEMS IN MAXIMO
- ADD ITEMS TO WORK ORDERS
  - THIS ALLOWS US TO TRACK REPAIR COST TO ASSETS
  - CREATES A SPARE PARTS LIST FOR THE ASSET
- TRACK ROTATING ASSETS



Assets | Filter | 1 - 6 of 6

| Asset | Description | Location | Status | Rotating Item | MAXGISID | Site | Serial Number |
|---|---|---|---|---|---|---|---|
| 1195984 | PUMP,ROTARY:LOBE,220 GPM CAPACITY,350 RPM,150 PSI,ELECTRIC MOTOR,DUCTILE IRON,DUCTILE IRON | CNTRLMAINT | BROKEN | 003887 | 0 | WATER | 16021401 |
| 1308865 | PUMP LOBE, SLUDGE, #02, NWWRF, SOLIDSDEWATER | SSWRFNWDBSF | OPERATING | 003887 | | WATER | 16068701 |
| 1311074 | PUMP LOBE, SLUDGE, #04, NWWRF, SOLIDSDEWATER | SSWRFNWDBSF | ACTIVE | 003887 | | WATER | 16069401 |
| 1340582 | PUMP,ROTARY:LOBE,220 GPM CAPACITY,350 RPM,150 PSI,ELECTRIC MOTOR,DUCTILE IRON,DUCTILE IRON | NOONDAY | NOT - ACT | 003887 | | WATER | 16074301 |
| SSWRFNW65082 | PUMP,ROTARY:LOBE,220 GPM CAPACITY,350 RPM,150 PSI,ELECTRIC MOTOR,DUCTILE IRON,DUCTILE IRON | NORTHWEST | NOT - ACT | 003887 | 0 | WATER | 16012101 |
| SSWRFNW65084 | PUMP,ROTARY:LOBE,220 GPM CAPACITY,350 RPM,150 PSI,ELECTRIC MOTOR,DUCTILE IRON,DUCTILE IRON | SCRAP | DECOMMISSIONED | 003887 | 0 | WATER | 16015101 |

SURPRISE!

"ATTENTION, ATTENTION EVERYONE ON BOARD!"
"THERE IS ABSOLUTELY NO REASON TO BE ALARMED"

❖GETTING WAREHOUSE TECHS AND MAINTENANCE ON BOARD

❖GETTING WAREHOUSE TECHS AND MAINTENANCE ON BOARD
❖IDENTIFYING ITEMS

❖GETTING WAREHOUSE TECHS AND MAINTENANCE ON BOARD
❖IDENTIFYING ITEMS
❖CREATING AND PROVIDING STANDARD OPERATING PROCEDURES (SOP)

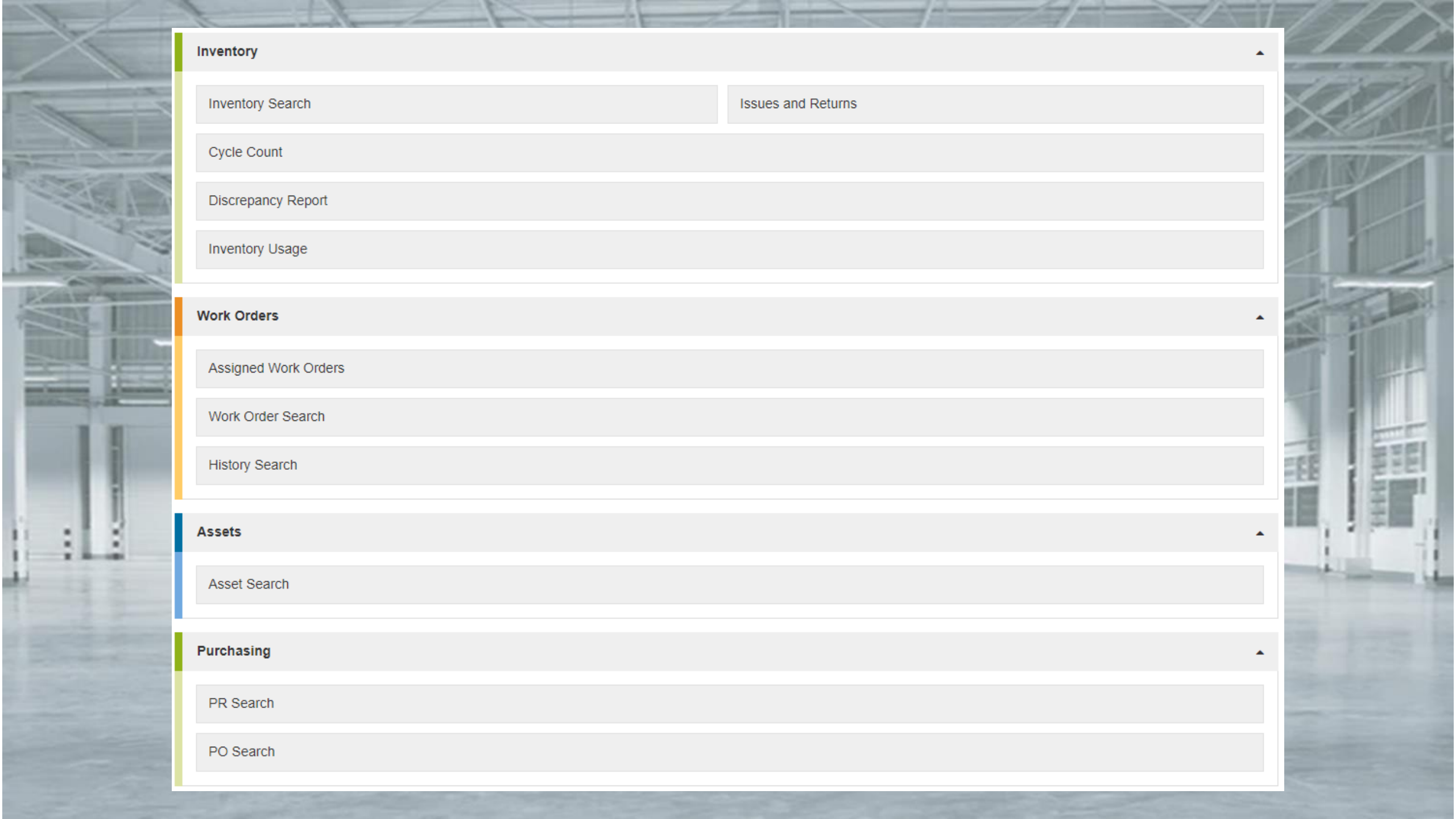
GETTING WAREHOUSE TECHS AND MAINTENANCE ON BOARD
IDENTIFYING ITEMS
CREATING AND PROVIDING SOP
REPORTING ROTATING ASSETS

- GETTING WAREHOUSE TECHS AND MAINTENANCE ON BOARD
- IDENTIFYING ITEMS
- CREATING AND PROVIDING SOP
- REPORTING ROTATING ASSETS
- LABELING SHELVING AND LABELING ITEMS

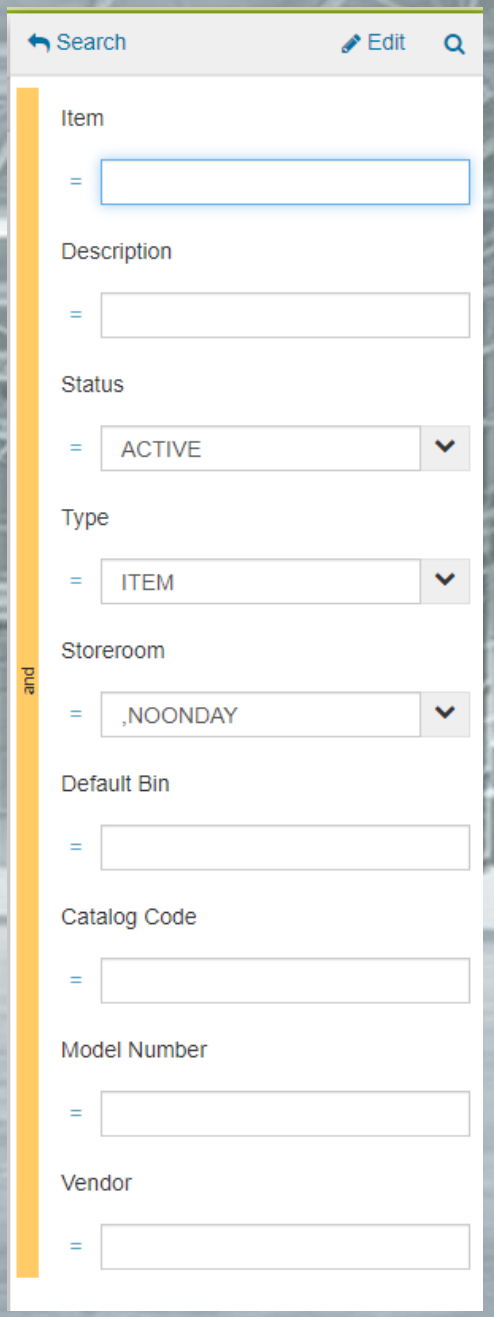
# UNRELIABLE INTERNET SERVICE

01:09:15:03
EUREKA!

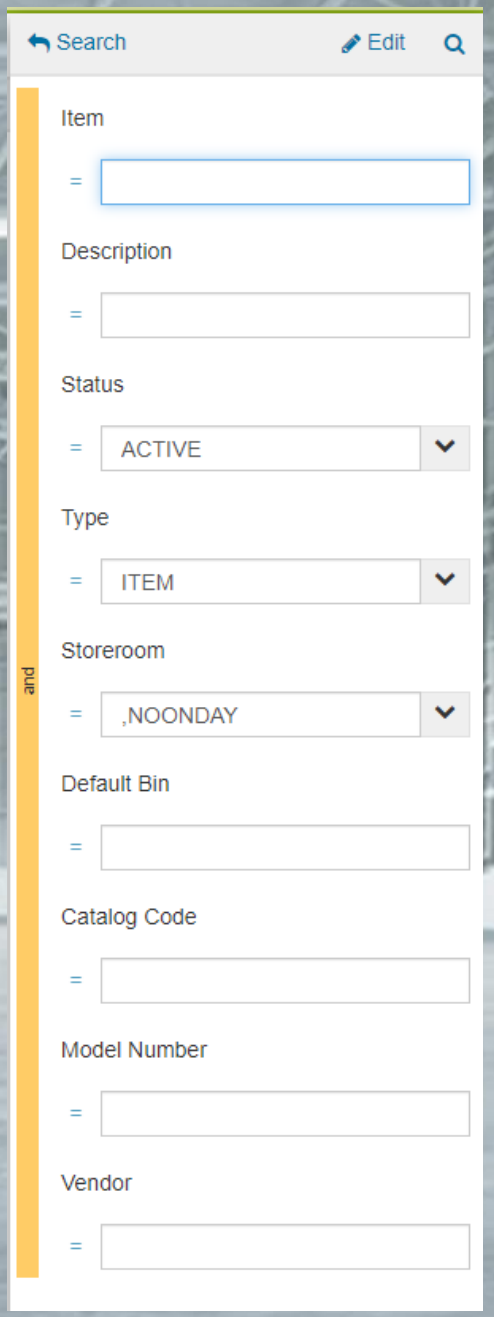
datasplice
PROMETHEUS GROUP


Inventory
Inventory Search
Issues and Returns
Cycle Count
Discrepancy Report
Inventory Usage
Work Orders
Assigned Work Orders
Work Order Search
History Search
Assets
Asset Search
Purchasing
PR Search
PO Search

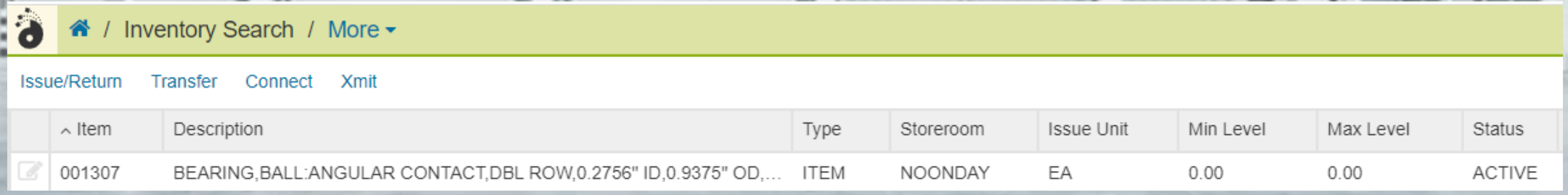
# ❖ADDING SPECIFIC SEARCH FIELDS FOR OUR NEEDS UNDER THE INVENTORY SEARCH

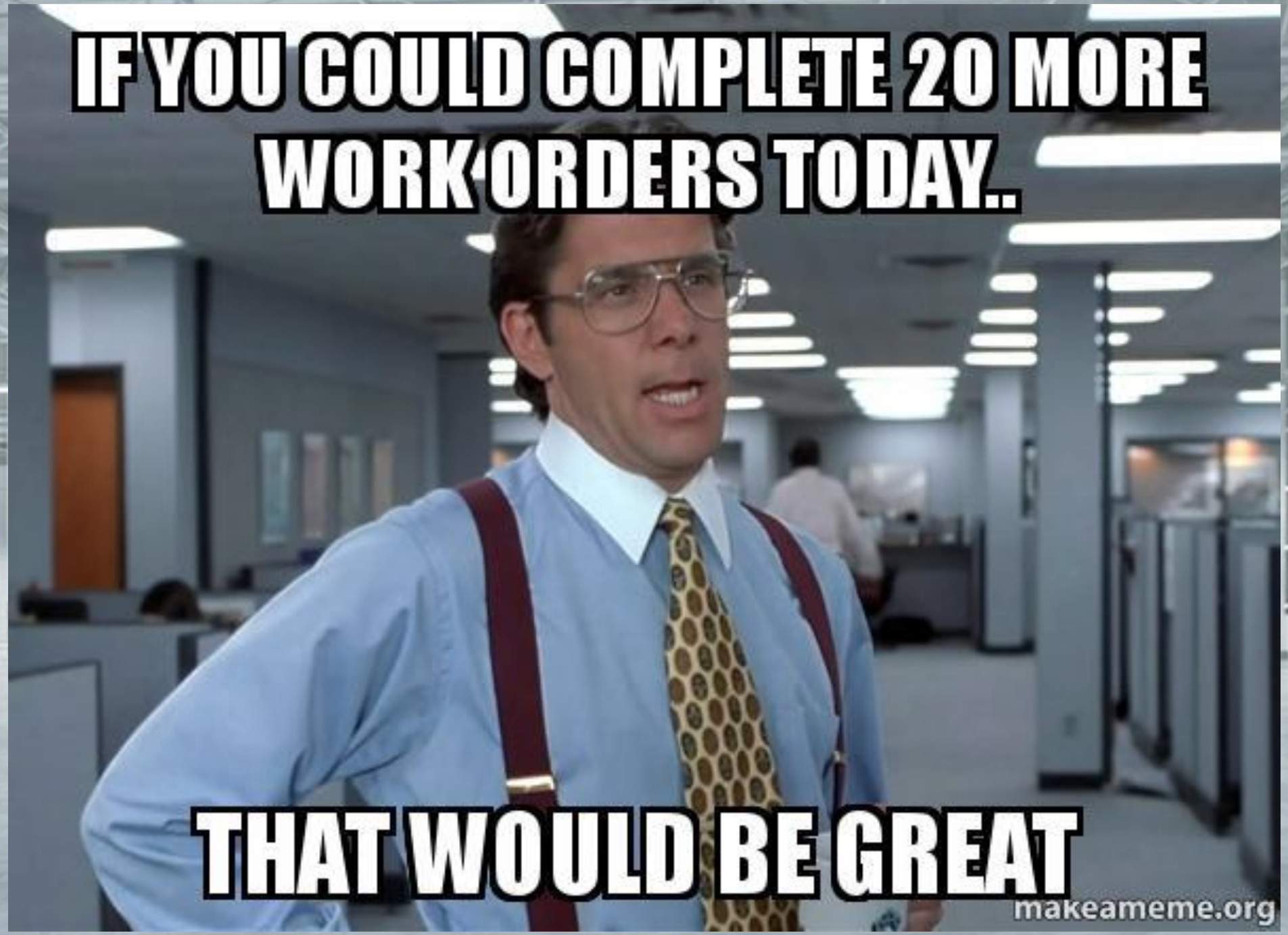


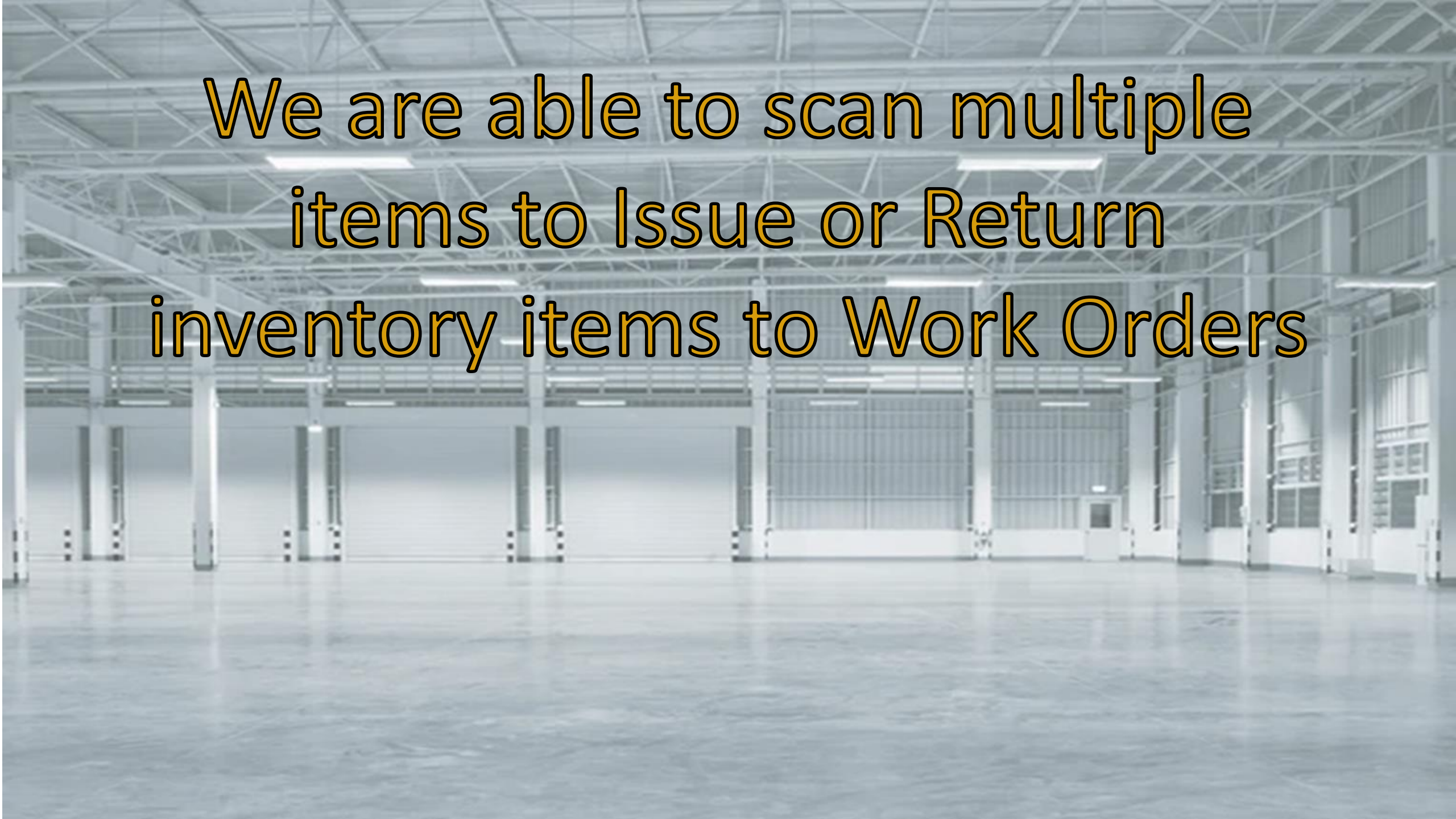
- ADDING SPECIFIC SEARCH FIELDS FOR OUR NEEDS UNDER THE INVENTORY SEARCH
- SCANNING BARCODES FOR THE ITEM NUMBER



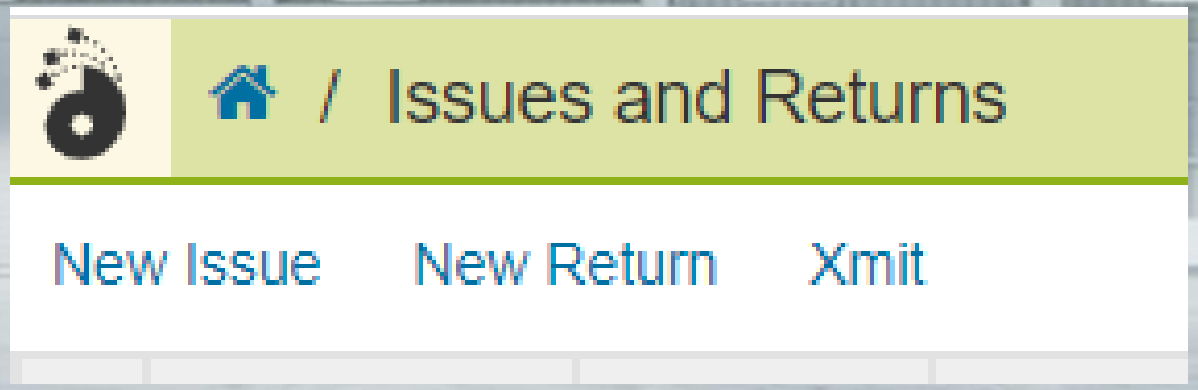
# ABILITY TO MOVE INVENTORY TO OTHER LOCATIONS, WORK ORDERS, OR JUST CHECK THE BALANCE

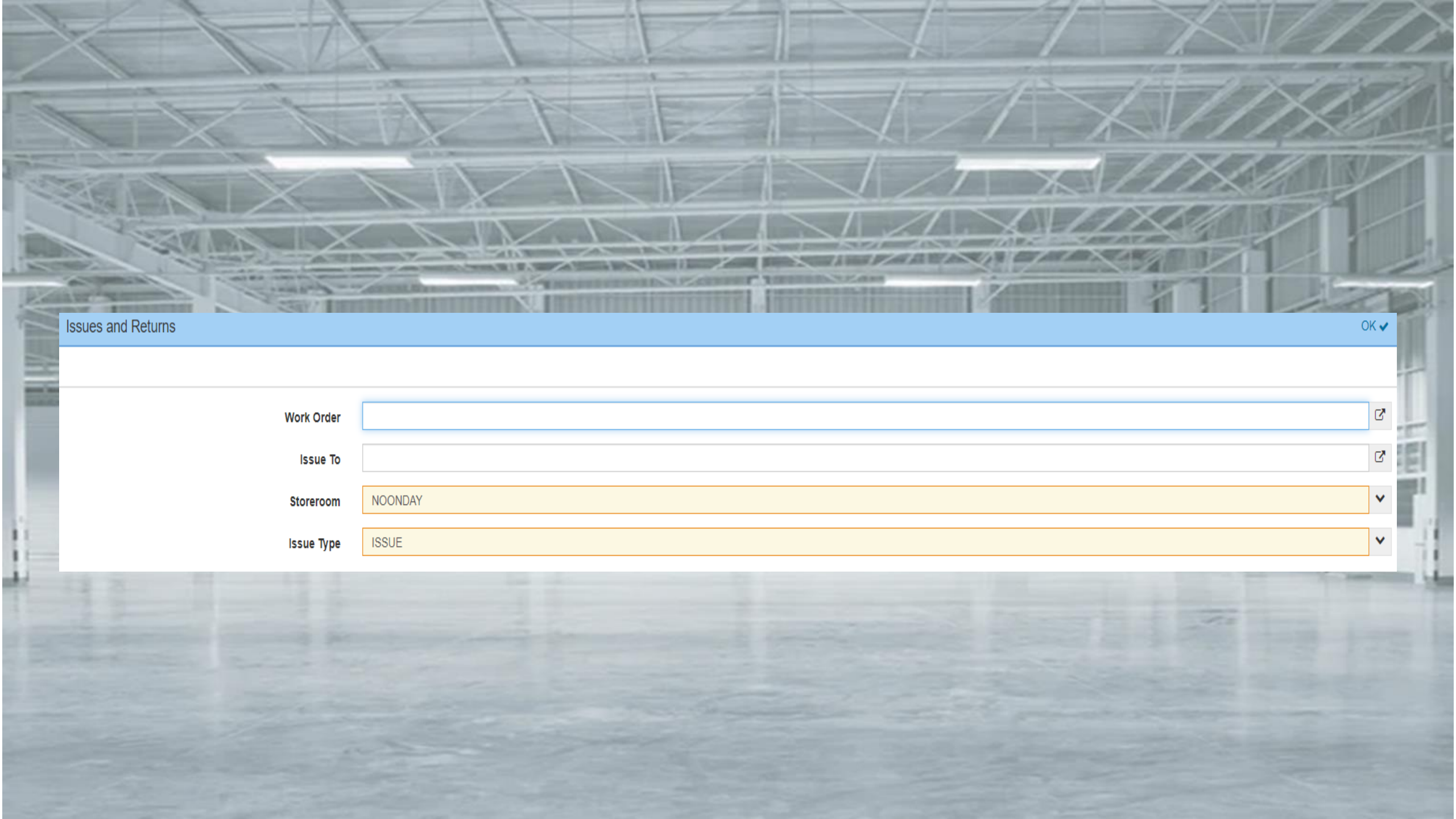


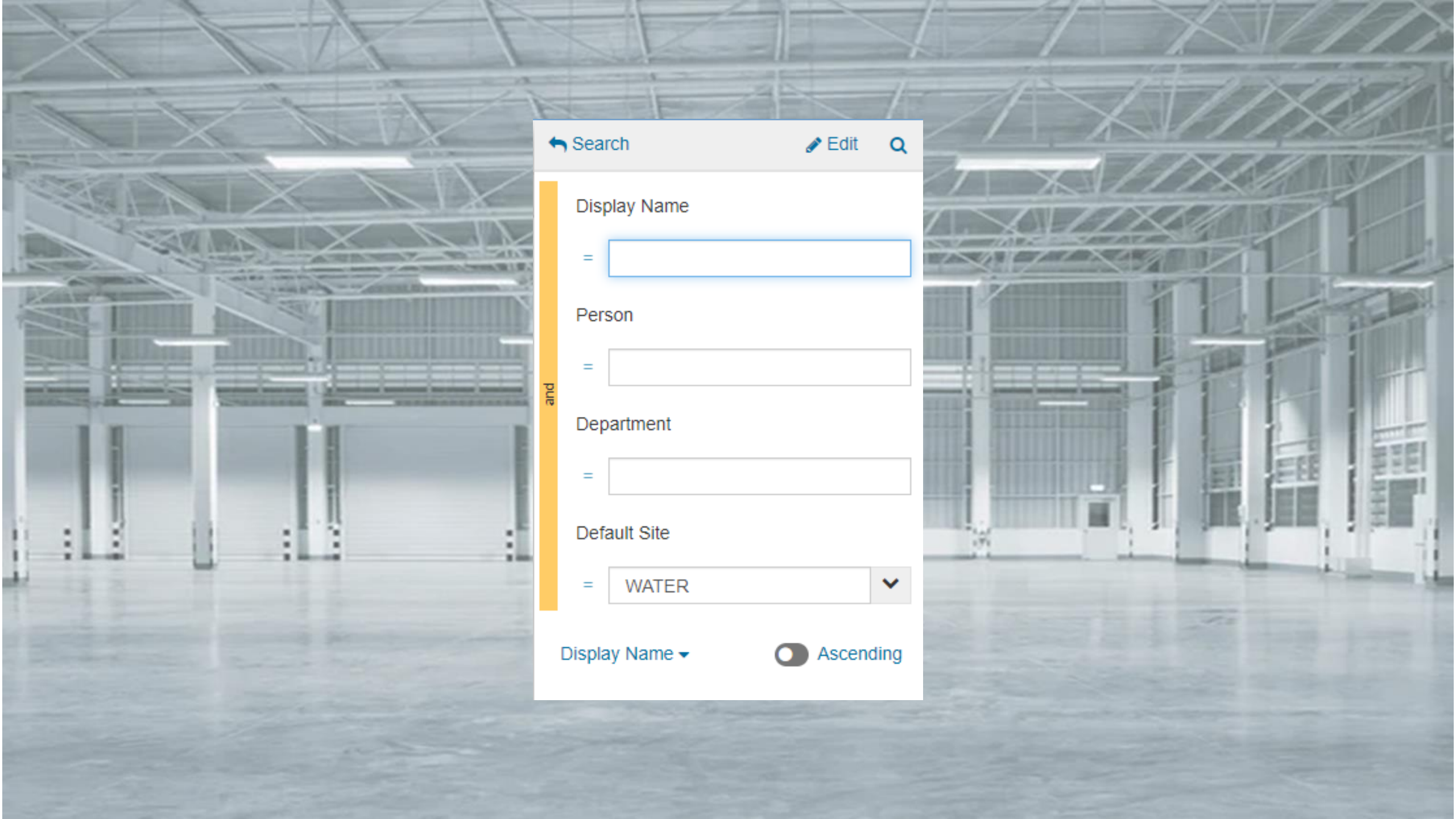

IF YOU COULD COMPLETE 20 MORE WORK ORDERS TODAY..
THAT WOULD BE GREAT
makeameme.org

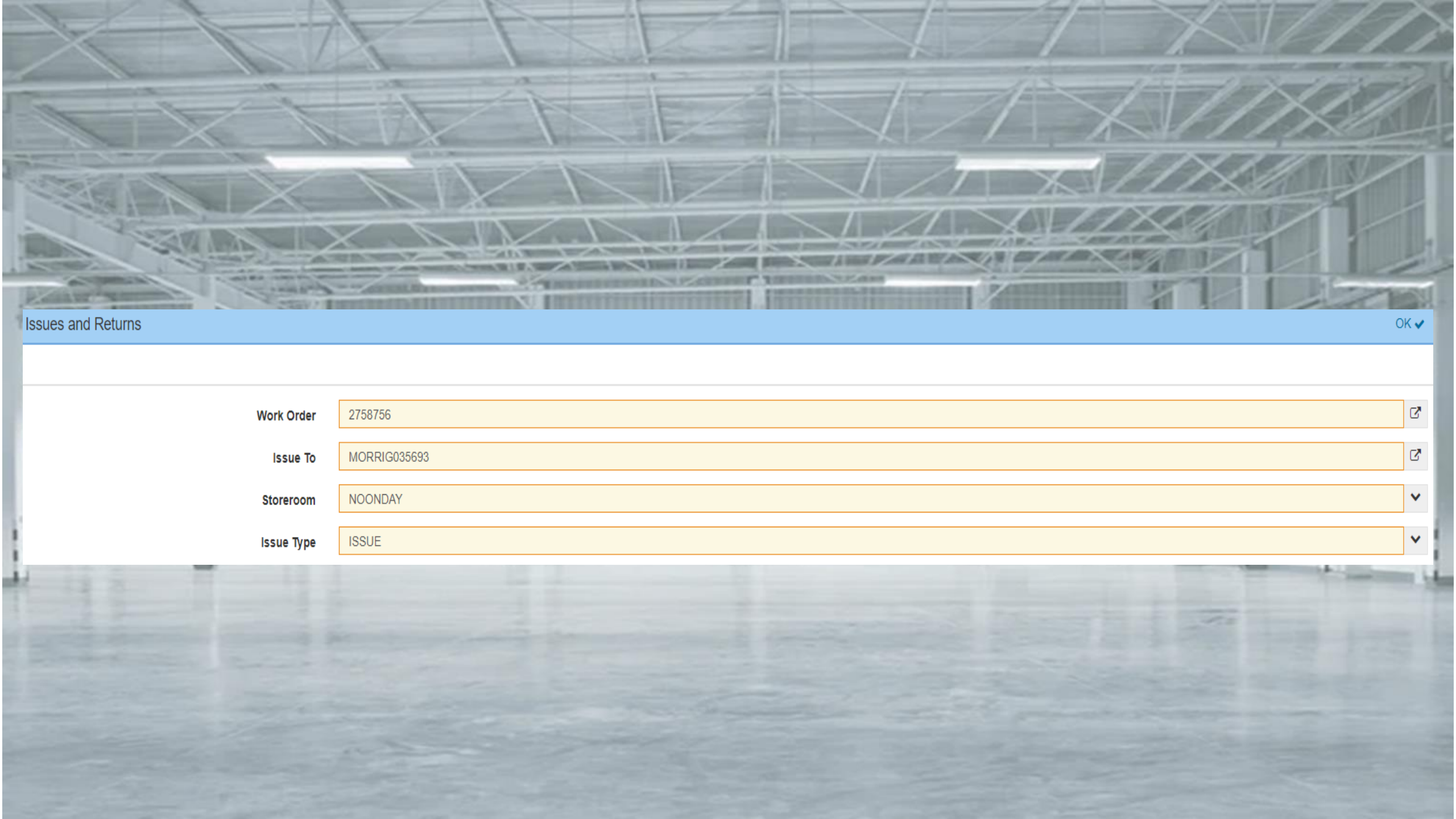

We are able to scan multiple items to Issue or Return inventory items to Work Orders

# We are able to scan multiple items to Issue or Return inventory items to Work Orders

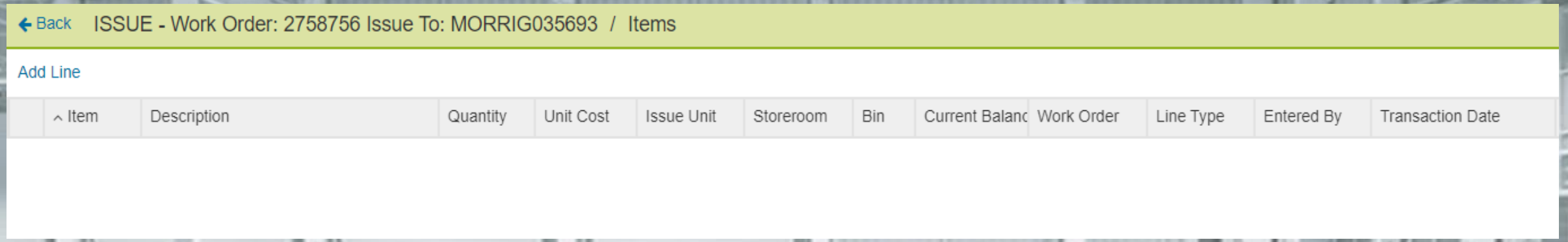



Issues and Returns
OK
Work Order
Issue To
Storeroom
NOONDAY
Issue Type
ISSUE


Search
Edit
Display Name
=
Person
=
and
Department
=
Default Site
=
WATER
Display Name
Ascending


Issues and Returns
OK
Work Order
2758756
Issue To
MORRIG035693
Storeroom
NOONDAY
Issue Type
ISSUE

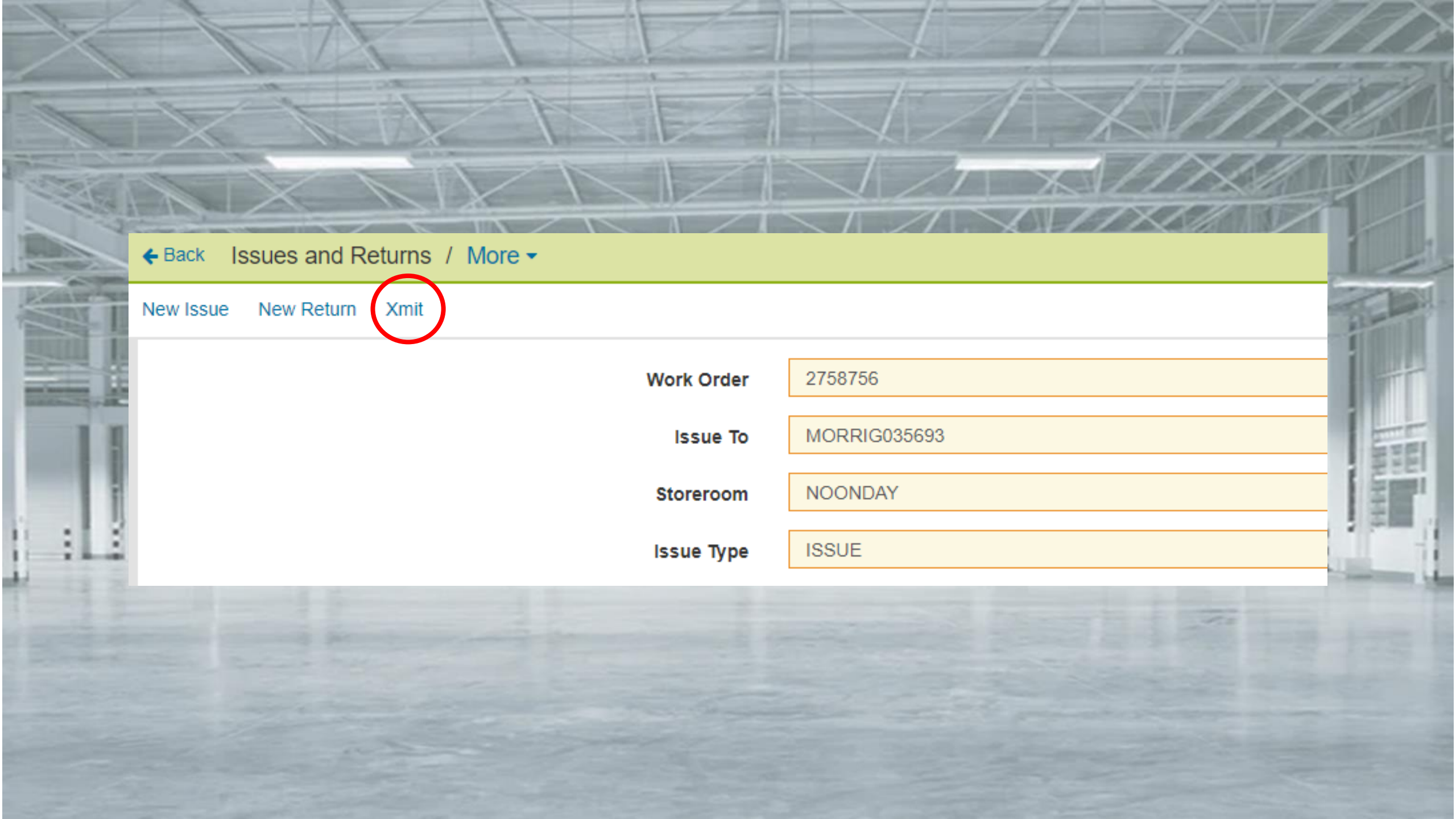
# From here we scan the barcodes that are on the items



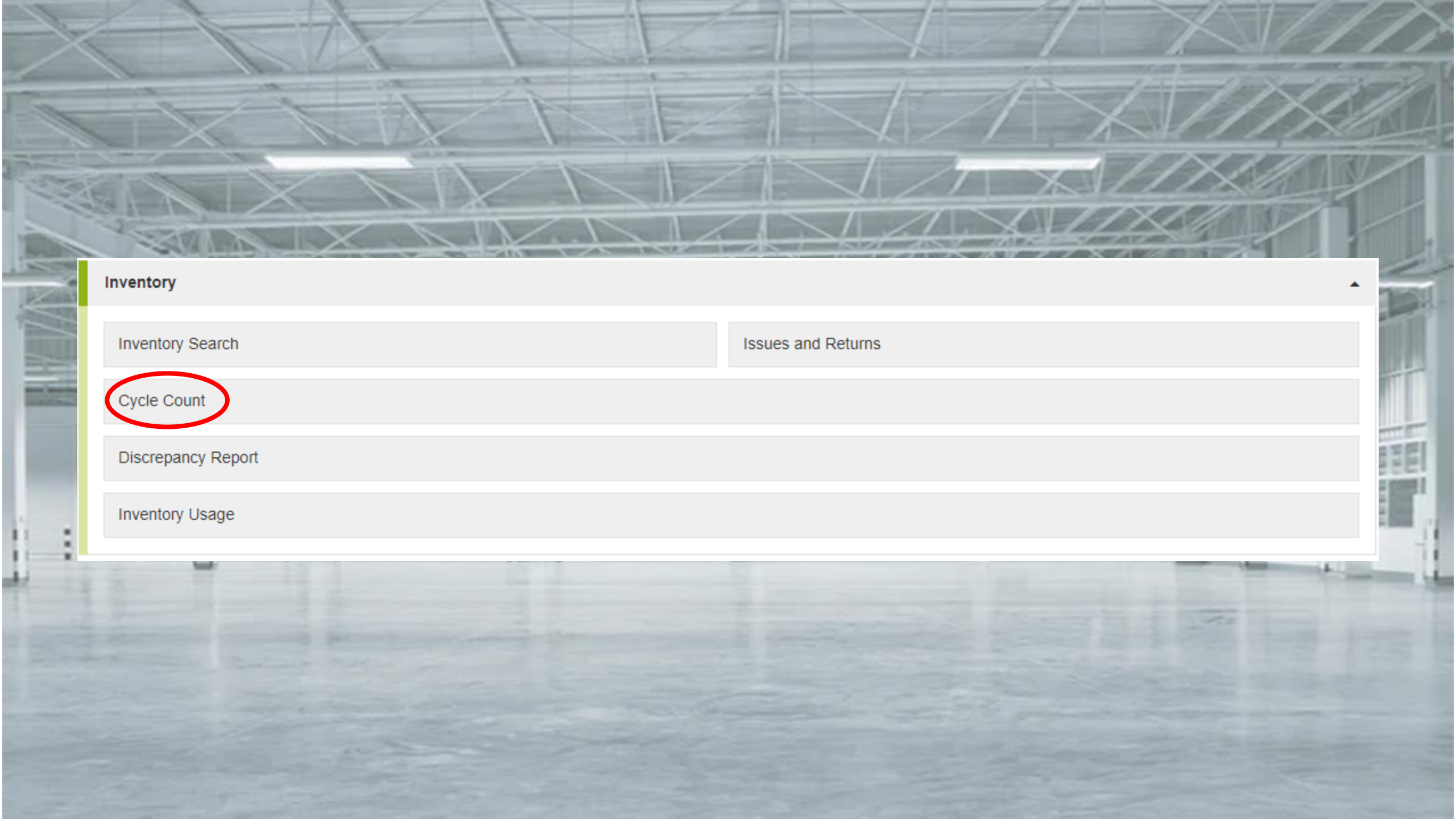
Back ISSUE - Work Order: 2758756 Issue To: MORRIG035693 / Items

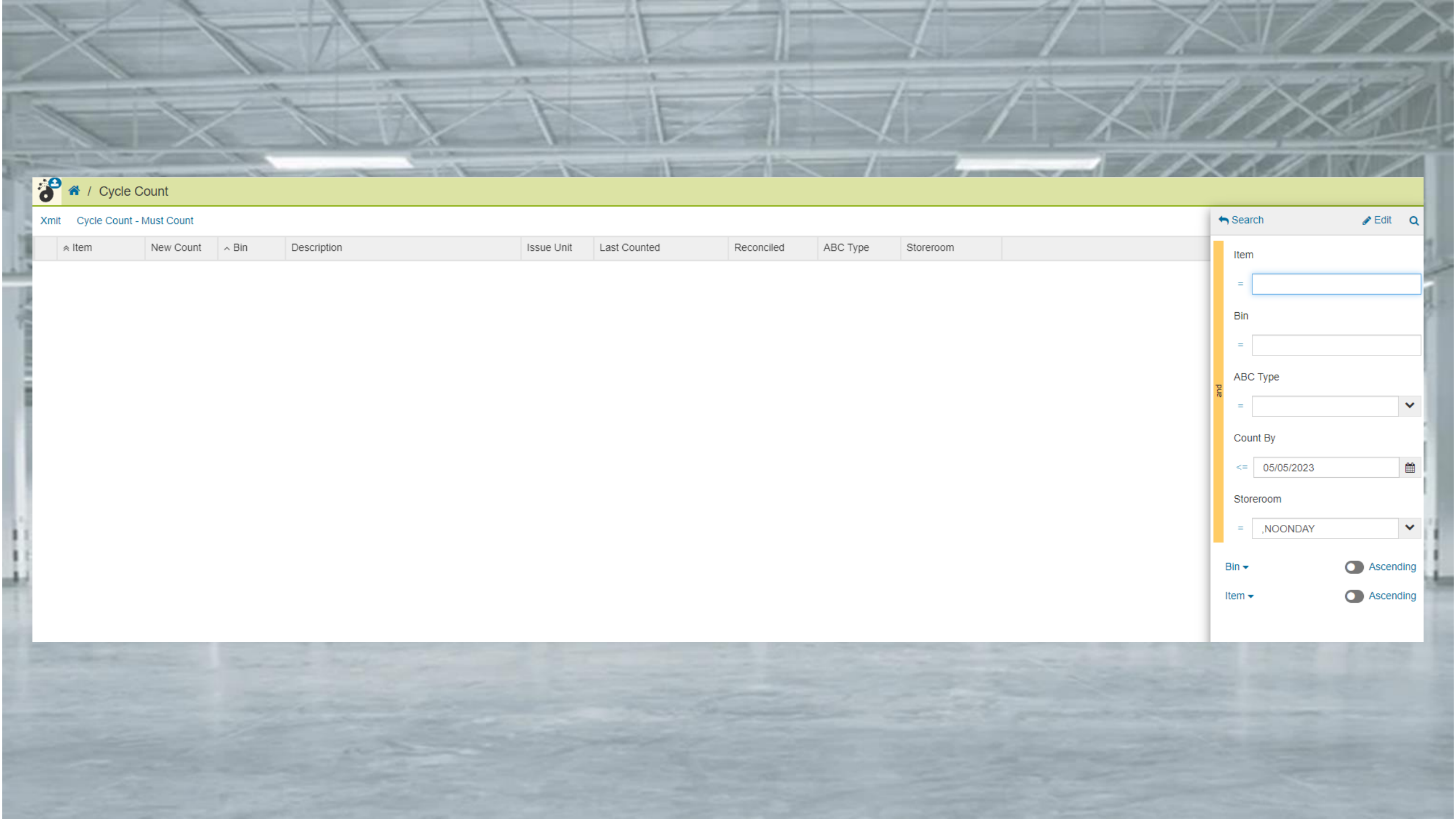
Add Line

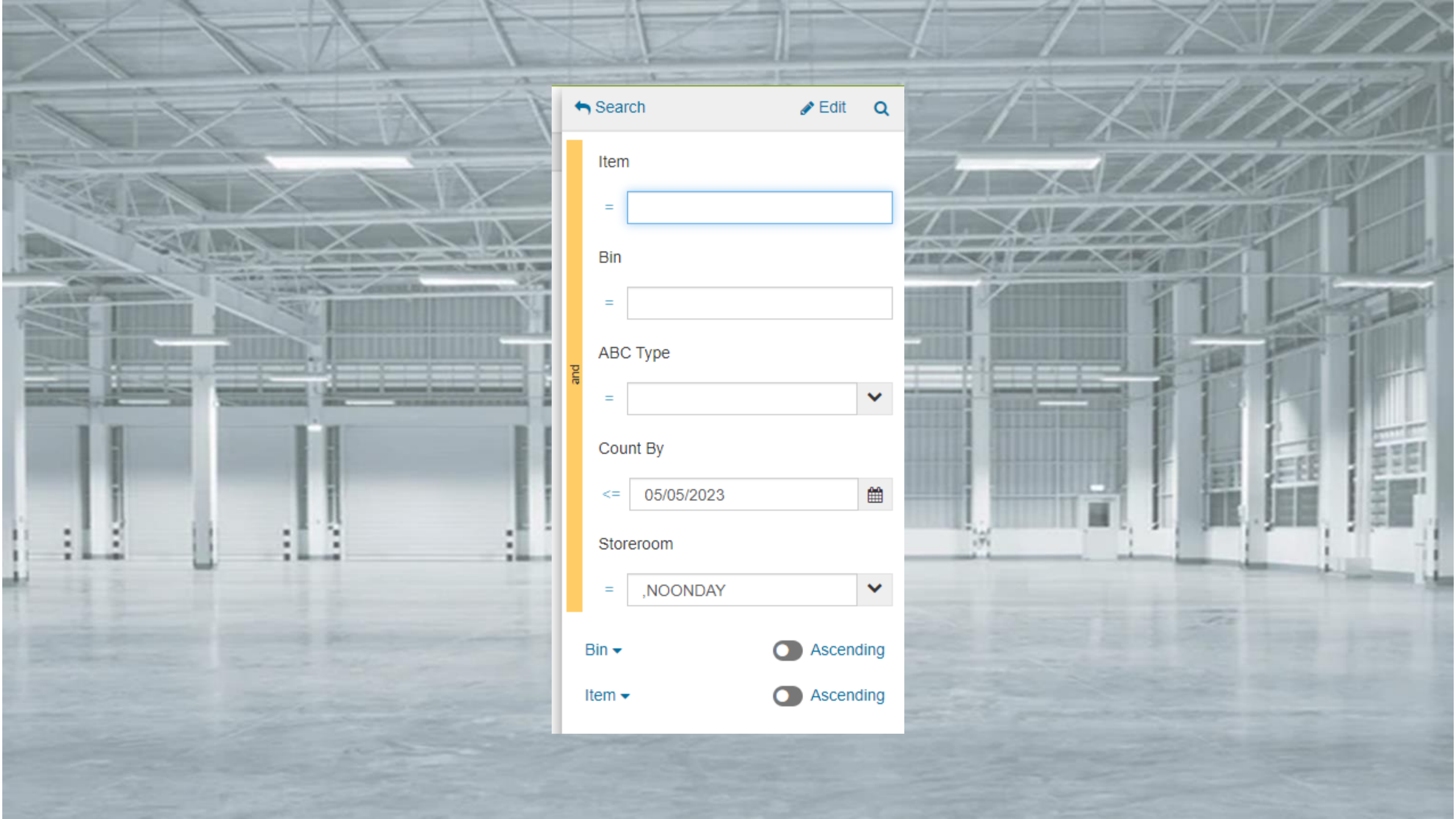
| Item | Description | Quantity | Unit Cost | Issue Unit | Storeroom | Bin | Current Balanc | Work Order | Line Type | Entered By | Transaction Date |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 001318 | BEARING,BALL:DEEP GROOVE,SG... | 1.00 | | EA | NOONDAY | US... | 2.00 | 2758756 | ITEM | MORRIG03... | 05/05/2023 5:42 AM |
| 001412 | SEAL,OIL:SINGLE LIP, SPRING LOA... | 2.00 | | EA | NOONDAY | US... | 4.00 | 2758756 | ITEM | MORRIG03... | 05/05/2023 5:42 AM |

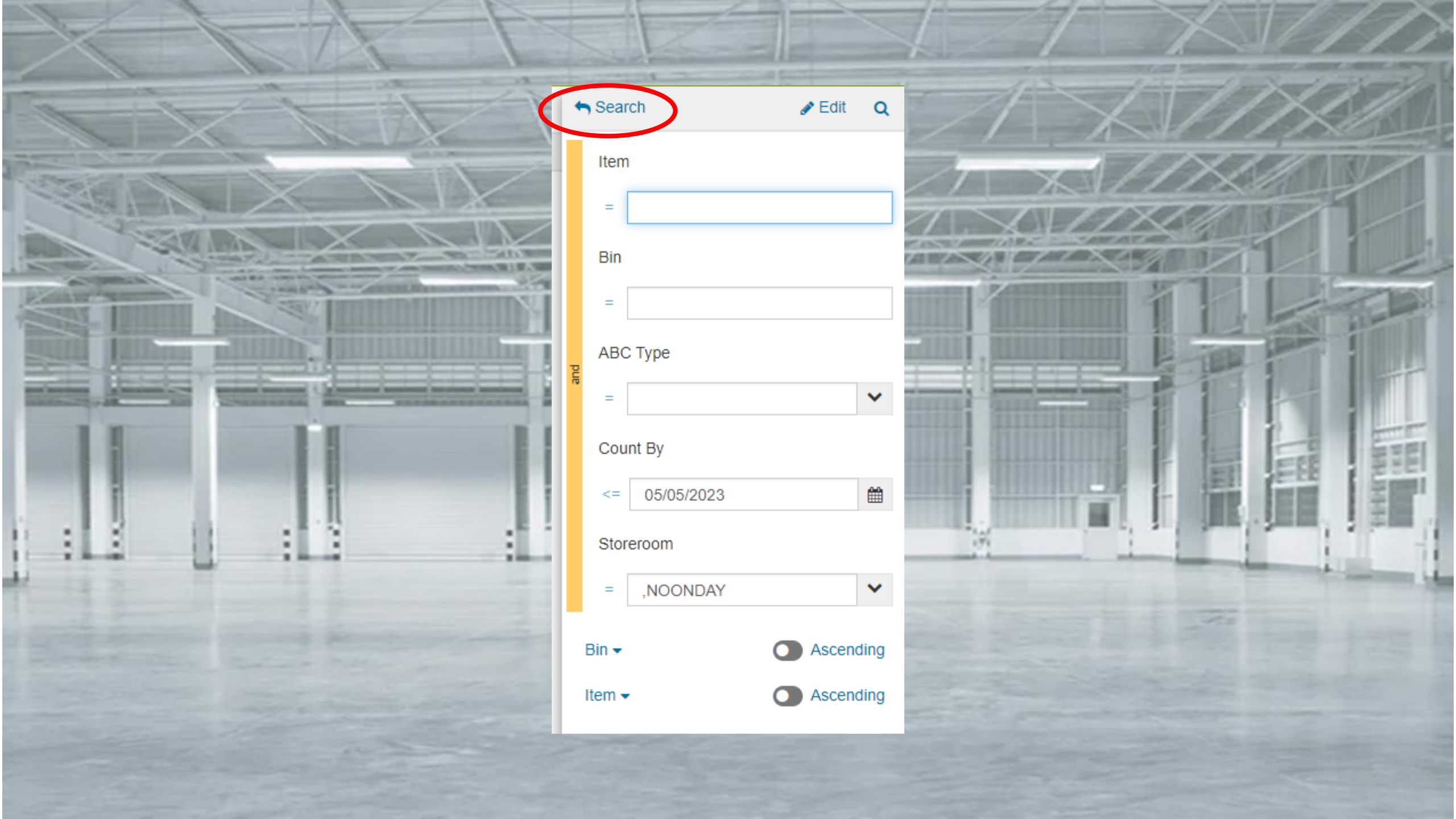

Back
Issues and Returns / More
New Issue
New Return
Xmit
Work Order
2758756
Issue To
MORRIG035693
Storeroom
NOONDAY
Issue Type
ISSUE

# ALL THE CYCLE COUNTS


Inventory
Inventory Search
Issues and Returns
Cycle Count
Discrepancy Report
Inventory Usage


/ Cycle Count
Xmit
Cycle Count - Must Count
Item
New Count
Bin
Description
Issue Unit
Last Counted
Reconciled
ABC Type
Storeroom
Search
Edit
Item
=
Bin
=
ABC Type
=
and
Count By
<=
05/05/2023
Storeroom
=
,NOONDAY
Bin
Ascending
Item
Ascending

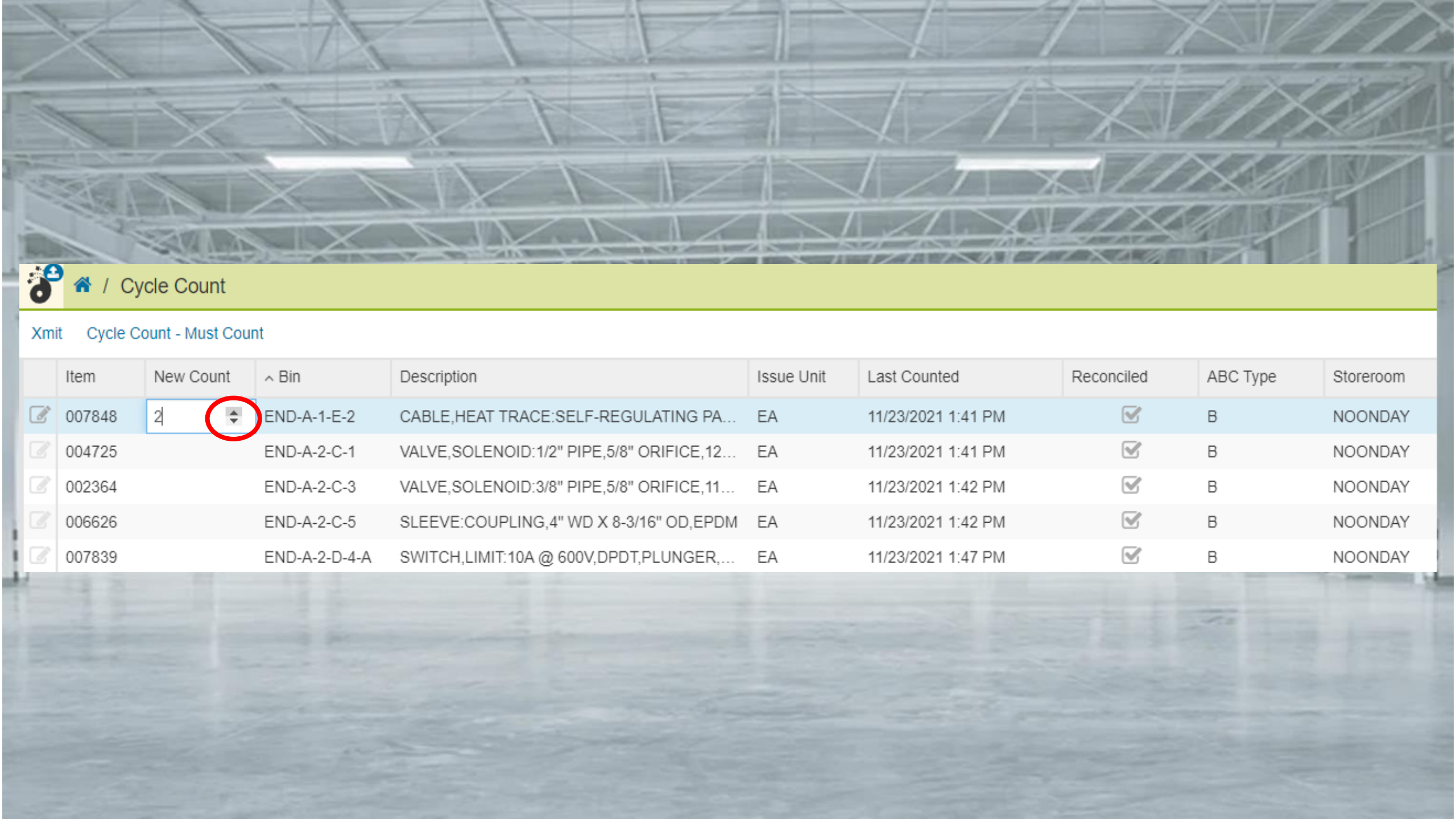

Search
Edit
Item
=
Bin
=
ABC Type
=
and
Count By
<=
05/05/2023
Storeroom
=
,NOONDAY
Bin
Ascending
Item
Ascending


Search
Edit
Item
=
Bin
=
ABC Type
=
and
Count By
<=
05/05/2023
Storeroom
=
,NOONDAY
Bin
Ascending
Item
Ascending

/ Cycle Count

Xmit  Cycle Count - Must Count

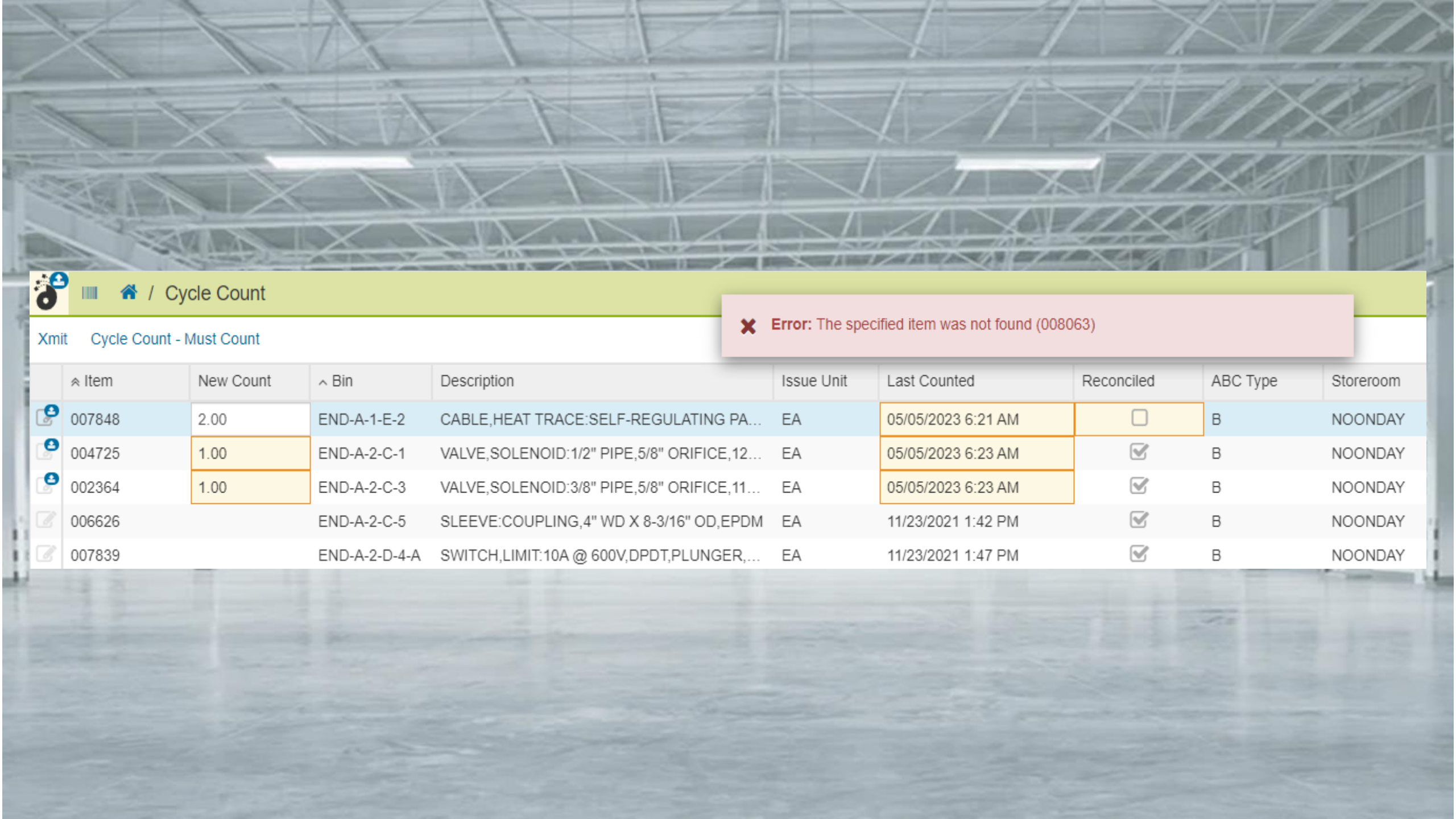
| | Item | New Count | Bin | Description | Issue Unit | Last Counted | Reconciled | ABC Type | Storeroom |
|---|---|---|---|---|---|---|---|---|---|
| | 007848 | | END-A-1-E-2 | CABLE,HEAT TRACE:SELF-REGULATING PA... | EA | 11/23/2021 1:41 PM | ☑ | B | NOONDAY |
| | 004725 | | END-A-2-C-1 | VALVE,SOLENOID:1/2" PIPE,5/8" ORIFICE,12... | EA | 11/23/2021 1:41 PM | ☑ | B | NOONDAY |
| | 002364 | | END-A-2-C-3 | VALVE,SOLENOID:3/8" PIPE,5/8" ORIFICE,11... | EA | 11/23/2021 1:42 PM | ☑ | B | NOONDAY |
| | 006626 | | END-A-2-C-5 | SLEEVE:COUPLING,4" WD X 8-3/16" OD,EPDM | EA | 11/23/2021 1:42 PM | ☑ | B | NOONDAY |
| | 007839 | | END-A-2-D-4-A | SWITCH,LIMIT:10A @ 600V,DPDT,PLUNGER,... | EA | 11/23/2021 1:47 PM | ☑ | B | NOONDAY |



/ Cycle Count

Xmit  Cycle Count - Must Count

| | Item | New Count | Bin | Description | Issue Unit | Last Counted | Reconciled | ABC Type | Storeroom |
|---|---|---|---|---|---|---|---|---|---|
| | 007848 | 2 | END-A-1-E-2 | CABLE,HEAT TRACE:SELF-REGULATING PA... | EA | 11/23/2021 1:41 PM | ☑ | B | NOONDAY |
| | 004725 | | END-A-2-C-1 | VALVE,SOLENOID:1/2" PIPE,5/8" ORIFICE,12... | EA | 11/23/2021 1:41 PM | ☑ | B | NOONDAY |
| | 002364 | | END-A-2-C-3 | VALVE,SOLENOID:3/8" PIPE,5/8" ORIFICE,11... | EA | 11/23/2021 1:42 PM | ☑ | B | NOONDAY |
| | 006626 | | END-A-2-C-5 | SLEEVE:COUPLING,4" WD X 8-3/16" OD,EPDM | EA | 11/23/2021 1:42 PM | ☑ | B | NOONDAY |
| | 007839 | | END-A-2-D-4-A | SWITCH,LIMIT:10A @ 600V,DPDT,PLUNGER,... | EA | 11/23/2021 1:47 PM | ☑ | B | NOONDAY |



/ Cycle Count

**Error:** The specified item was not found (008063)

Xmit  Cycle Count - Must Count

| Item | New Count | Bin | Description | Issue Unit | Last Counted | Reconciled | ABC Type | Storeroom |
|---|---|---|---|---|---|---|---|---|
| 007848 | 2.00 | END-A-1-E-2 | CABLE,HEAT TRACE:SELF-REGULATING PA... | EA | 05/05/2023 6:21 AM | ☐ | B | NOONDAY |
| 004725 | 1.00 | END-A-2-C-1 | VALVE,SOLENOID:1/2" PIPE,5/8" ORIFICE,12... | EA | 05/05/2023 6:23 AM | ☑ | B | NOONDAY |
| 002364 | 1.00 | END-A-2-C-3 | VALVE,SOLENOID:3/8" PIPE,5/8" ORIFICE,11... | EA | 05/05/2023 6:23 AM | ☑ | B | NOONDAY |
| 006626 | | END-A-2-C-5 | SLEEVE:COUPLING,4" WD X 8-3/16" OD,EPDM | EA | 11/23/2021 1:42 PM | ☑ | B | NOONDAY |
| 007839 | | END-A-2-D-4-A | SWITCH,LIMIT:10A @ 600V,DPDT,PLUNGER,... | EA | 11/23/2021 1:47 PM | ☑ | B | NOONDAY |

/ Cycle Count

Xmit | Cycle Count - Must Count

| Item | New Count | Bin | Description | Issue Unit | Last Counted | Reconciled | ABC Type | Storeroom |
|---|---|---|---|---|---|---|---|---|
| 007848 | 2.00 | END-A-1-E-2 | CABLE,HEAT TRACE:SELF-REGULATING PA... | EA | 05/05/2023 6:21 AM | ☐ | B | NOONDAY |
| 004725 | 1.00 | END-A-2-C-1 | VALVE,SOLENOID:1/2" PIPE,5/8" ORIFICE,12... | EA | 05/05/2023 6:23 AM | ☑ | B | NOONDAY |
| 002364 | 1.00 | END-A-2-C-3 | VALVE,SOLENOID:3/8" PIPE,5/8" ORIFICE,11... | EA | 05/05/2023 6:23 AM | ☑ | B | NOONDAY |
| 006626 | 3.00 | END-A-2-C-5 | SLEEVE:COUPLING,4" WD X 8-3/16" OD,EPDM | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| 007839 | 0.00 | END-A-2-D-4-A | SWITCH,LIMIT:10A @ 600V,DPDT,PLUNGER,... | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| 006911 | 12.00 | END-A-3-B-6-B | SLEEVE:SPROCKET AND GEAR,8-3/16" OD,... | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| 007839 | 1.00 | END-A-3-D-4 | SWITCH,LIMIT:10A @ 600V,DPDT,PLUNGER,... | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| 007844 | 2.00 | END-A-3-E-3 | FILTER:GENERAL PURPOSE,9.80" HT X 4.8" ... | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| 007843 | 1.00 | END-A-4-E-1 | SWITCH,LIMIT:15A @ 480VAC, 0.02A @ 250V... | EA | 05/05/2023 7:17 AM | ☑ | B | NOONDAY |
| 004772 | 1.00 | END-A-4-E-2 | CONTACT:REPLACEMENT KIT,3A,600V,NEM... | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| 002809 | 1.00 | END-A-7-B-1 | KIT,CONTACT | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| 007839 | 1.00 | END-A-7-C-4-A | SWITCH,LIMIT:10A @ 600V,DPDT,PLUNGER,... | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| 007777 | 1.00 | END-A-7-D-5 | CONTROLLER:HACH SC200,-20 - 60 DEG C,... | EA | 05/05/2023 7:17 AM | ☐ | A | NOONDAY |

/ Cycle Count

Xmit  Cycle Count - Must Count

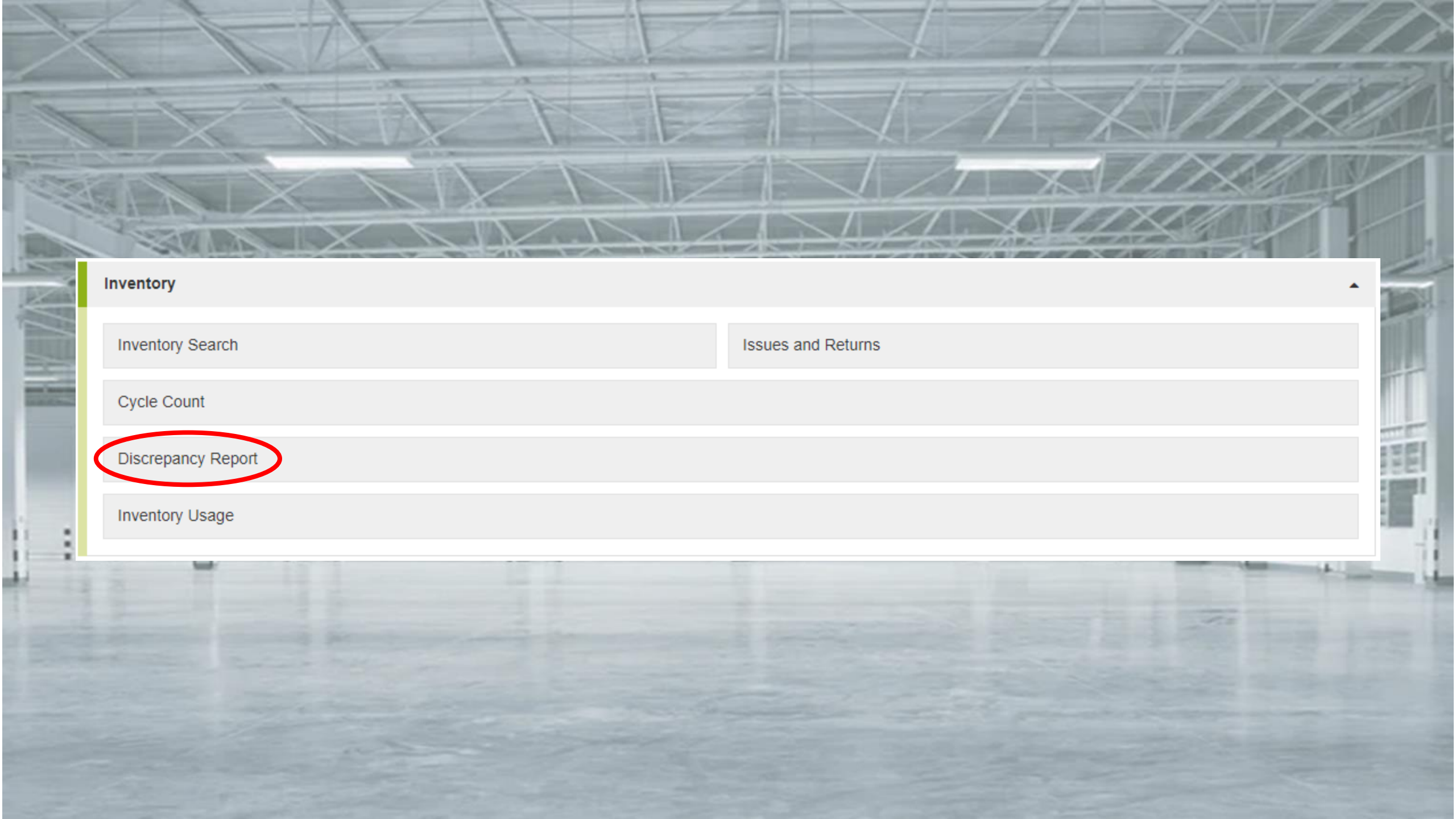
| Item | New Count | Bin | Description | Issue Unit | Last Counted | Reconciled | ABC Type | Storeroom |
|---|---|---|---|---|---|---|---|---|
| 007848 | 2.00 | END-A-1-E-2 | CABLE,HEAT TRACE:SELF-REGULATING PA... | EA | 05/05/2023 6:21 AM | ☐ | B | NOONDAY |
| 004725 | 1.00 | END-A-2-C-1 | VALVE,SOLENOID:1/2" PIPE,5/8" ORIFICE,12... | EA | 05/05/2023 6:23 AM | ☑ | B | NOONDAY |
| 002364 | 1.00 | END-A-2-C-3 | VALVE,SOLENOID:3/8" PIPE,5/8" ORIFICE,11... | EA | 05/05/2023 6:23 AM | ☑ | B | NOONDAY |
| 006626 | 3.00 | END-A-2-C-5 | SLEEVE:COUPLING,4" WD X 8-3/16" OD,EPDM | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| 007839 | 0.00 | END-A-2-D-4-A | SWITCH,LIMIT:10A @ 600V,DPDT,PLUNGER,... | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| 006911 | 12.00 | END-A-3-B-6-B | SLEEVE:SPROCKET AND GEAR,8-3/16" OD,... | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| 007839 | 1.00 | END-A-3-D-4 | SWITCH,LIMIT:10A @ 600V,DPDT,PLUNGER,... | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| 007844 | 2.00 | END-A-3-E-3 | FILTER:GENERAL PURPOSE,9.80" HT X 4.8" ... | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| 007843 | 1.00 | END-A-4-E-1 | SWITCH,LIMIT:15A @ 480VAC, 0.02A @ 250V... | EA | 05/05/2023 7:17 AM | ☑ | B | NOONDAY |
| 004772 | 1.00 | END-A-4-E-2 | CONTACT:REPLACEMENT KIT,3A,600V,NEM... | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| 002809 | 1.00 | END-A-7-B-1 | KIT,CONTACT | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| 007839 | 1.00 | END-A-7-C-4-A | SWITCH,LIMIT:10A @ 600V,DPDT,PLUNGER,... | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| 007777 | 1.00 | END-A-7-D-5 | CONTROLLER:HACH SC200,-20 - 60 DEG C,... | EA | 05/05/2023 7:17 AM | ☐ | A | NOONDAY |

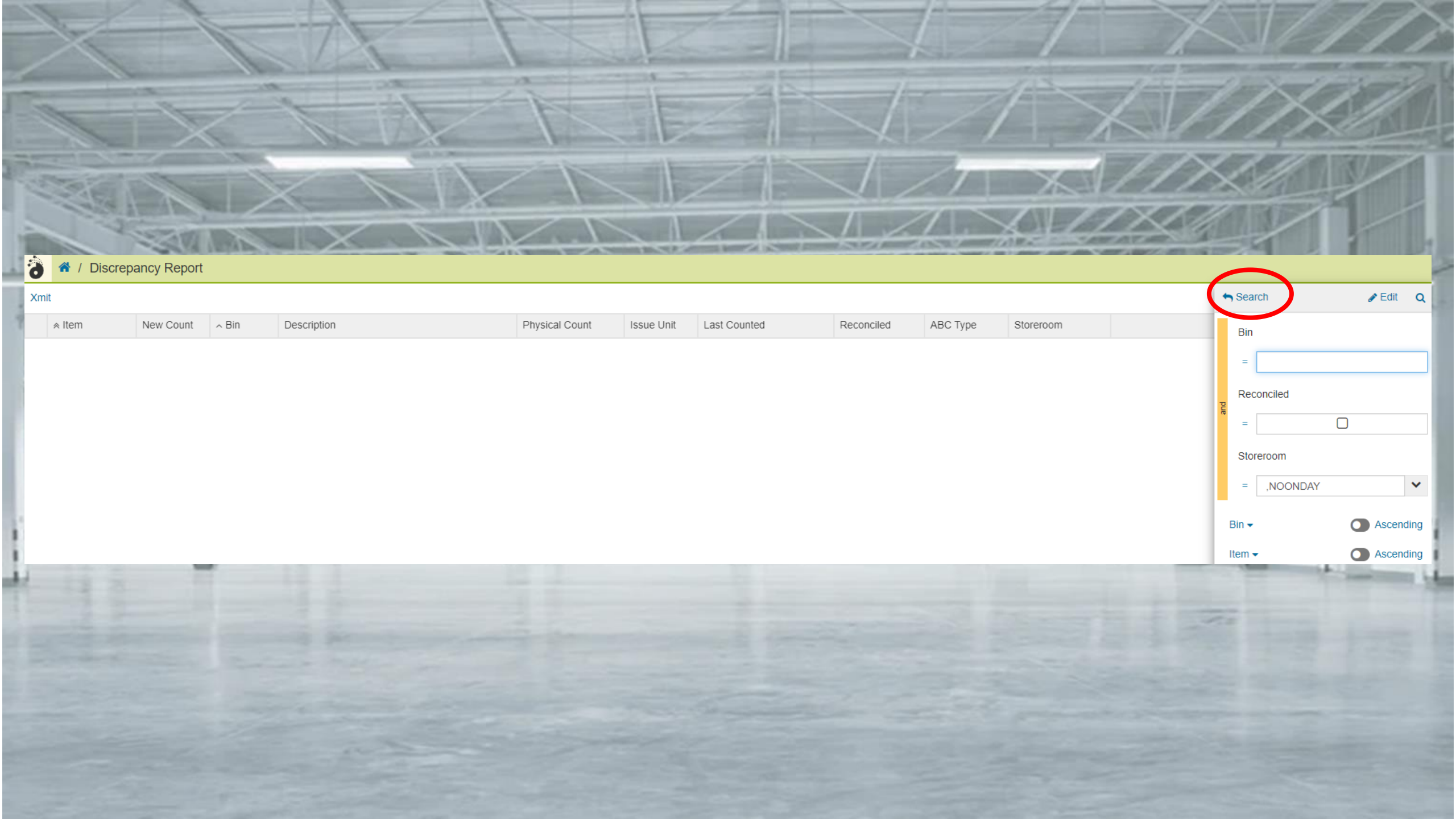
/ Cycle Count

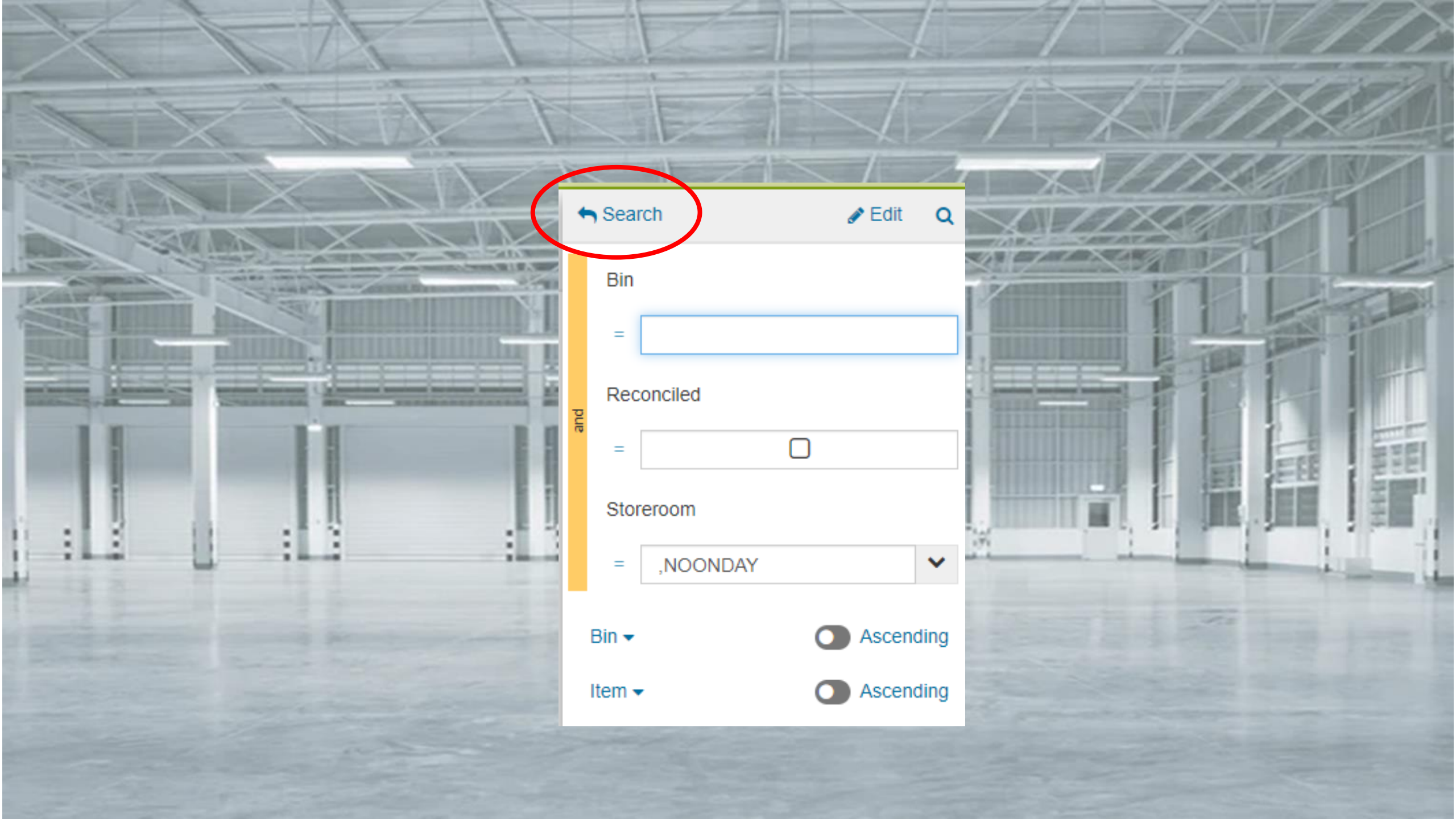
Xmit  Cycle Count - Must Count

| | Item | New Count | Bin | Description | Issue Unit | Last Counted | Reconciled | ABC Type | Storeroom |
|---|---|---|---|---|---|---|---|---|---|
| | 007848 | 2.00 | END-A-1-E-2 | CABLE,HEAT TRACE:SELF-REGULATING PA... | EA | 05/05/2023 6:21 AM | ☐ | B | NOONDAY |
| | 004725 | 1.00 | END-A-2-C-1 | VALVE,SOLENOID:1/2" PIPE,5/8" ORIFICE,12... | EA | 05/05/2023 6:23 AM | ☑ | B | NOONDAY |
| | 002364 | 1.00 | END-A-2-C-3 | VALVE,SOLENOID:3/8" PIPE,5/8" ORIFICE,11... | EA | 05/05/2023 6:23 AM | ☑ | B | NOONDAY |
| | 006626 | 3.00 | END-A-2-C-5 | SLEEVE:COUPLING,4" WD X 8-3/16" OD,EPDM | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| | 007839 | 0.00 | END-A-2-D-4-A | SWITCH,LIMIT:10A @ 600V,DPDT,PLUNGER,... | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| | 006911 | 12.00 | END-A-3-B-6-B | SLEEVE:SPROCKET AND GEAR,8-3/16" OD,... | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| | 007839 | 1.00 | END-A-3-D-4 | SWITCH,LIMIT:10A @ 600V,DPDT,PLUNGER,... | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| | 007844 | 2.00 | END-A-3-E-3 | FILTER:GENERAL PURPOSE,9.80" HT X 4.8" ... | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| | 007843 | 1.00 | END-A-4-E-1 | SWITCH,LIMIT:15A @ 480VAC, 0.02A @ 250V... | EA | 05/05/2023 7:17 AM | ☑ | B | NOONDAY |
| | 004772 | 1.00 | END-A-4-E-2 | CONTACT:REPLACEMENT KIT,3A,600V,NEM... | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| | 002809 | 1.00 | END-A-7-B-1 | KIT,CONTACT | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| | 007839 | 1.00 | END-A-7-C-4-A | SWITCH,LIMIT:10A @ 600V,DPDT,PLUNGER,... | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| | 007777 | 1.00 | END-A-7-D-5 | CONTROLLER:HACH SC200,-20 - 60 DEG C,... | EA | 05/05/2023 7:17 AM | ☐ | A | NOONDAY |

DISCREPANCY
DISCREPANCY
EVERYWHERE
makeameme.org


Inventory
Inventory Search
Issues and Returns
Cycle Count
Discrepancy Report
Inventory Usage


/ Discrepancy Report
Xmit
Search
Edit
Item
New Count
Bin
Description
Physical Count
Issue Unit
Last Counted
Reconciled
ABC Type
Storeroom
Bin
=
Reconciled
=
Storeroom
=
,NOONDAY
and
Bin
Ascending
Item
Ascending

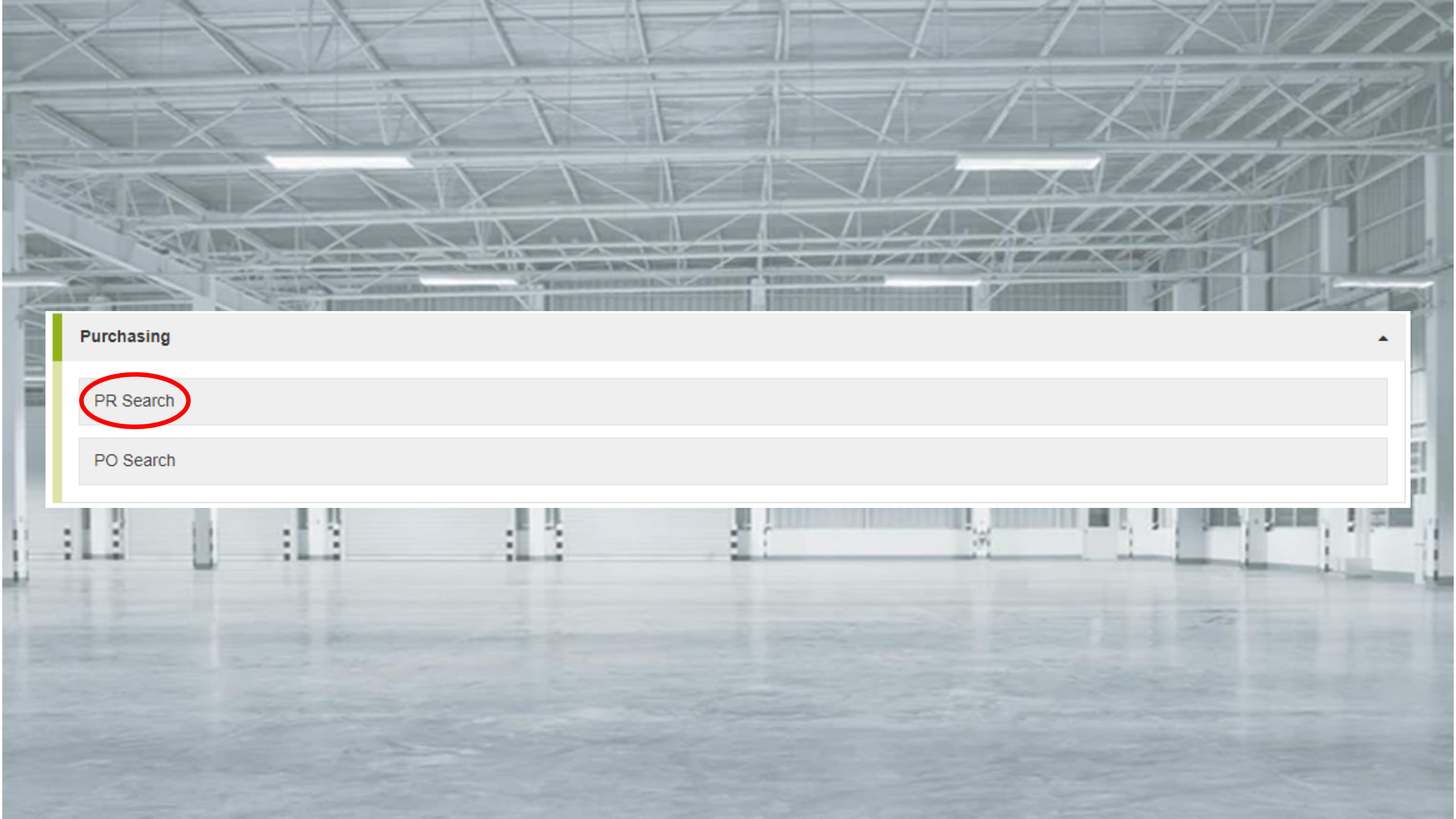

Search
Edit
Bin
=
Reconciled
=
Storeroom
=
,NOONDAY
and
Bin
Ascending
Item
Ascending

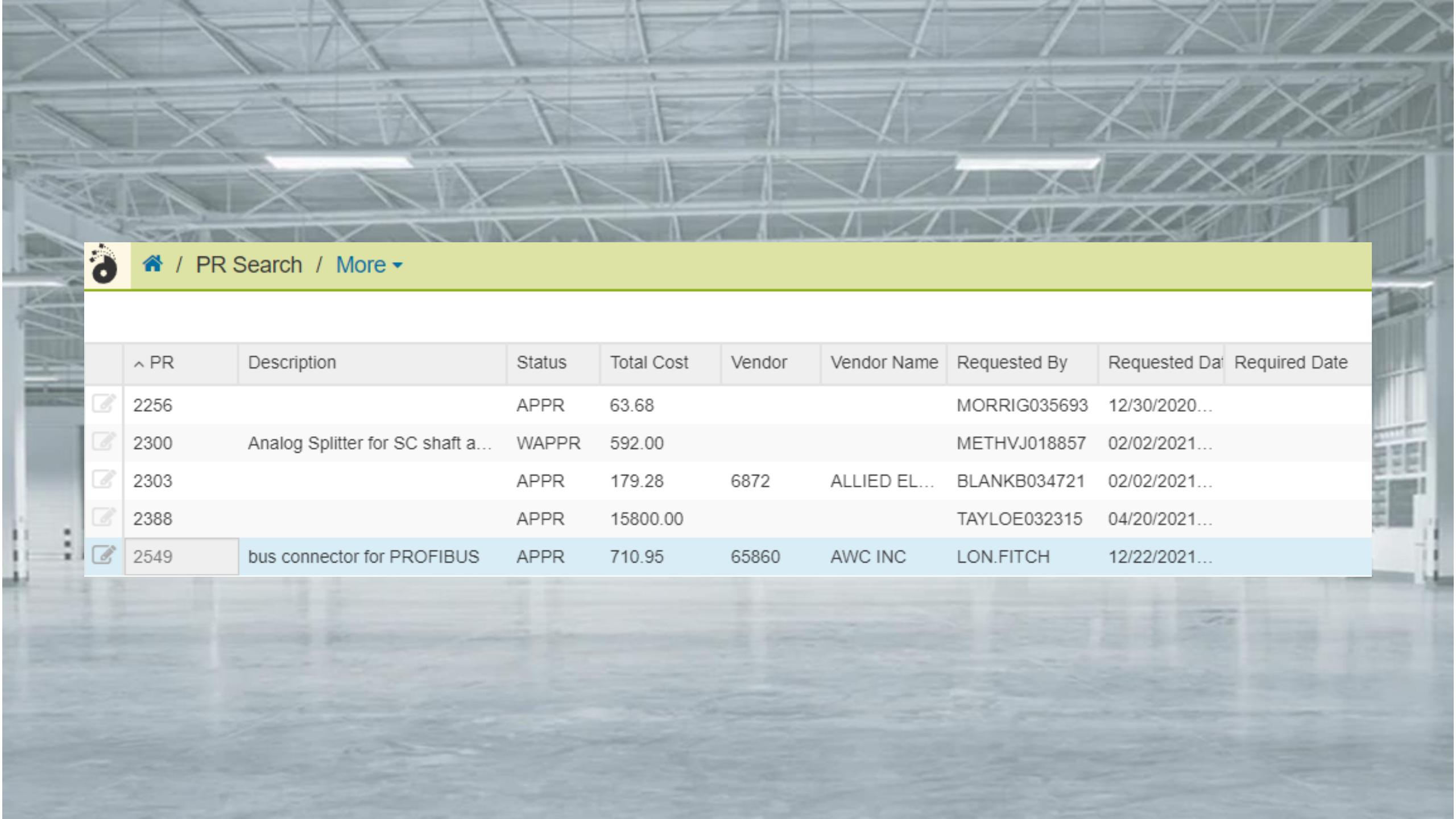
/ Discrepancy Report

Xmit

| | Item | New Count | Bin | Description | Physical Count | Issue Unit | Last Counted | Reconciled | ABC Type | Storeroom |
|---|---|---|---|---|---|---|---|---|---|---|
| | 007848 | | END-A-1-... | CABLE,HEAT TRACE:SELF-REGULATING PA... | 2.00 | EA | 05/05/2023 6:21 AM | ☐ | B | NOONDAY |
| | 006626 | | END-A-2-... | SLEEVE:COUPLING,4" WD X 8-3/16" OD,EPDM | 3.00 | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| | 007839 | | END-A-2-... | SWITCH,LIMIT:10A @ 600V,DPDT,PLUNGER,... | 0.00 | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| | 006911 | | END-A-3-... | SLEEVE:SPROCKET AND GEAR,8-3/16" OD,... | 12.00 | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| | 007839 | | END-A-3-... | SWITCH,LIMIT:10A @ 600V,DPDT,PLUNGER,... | 1.00 | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| | 007844 | | END-A-3-... | FILTER:GENERAL PURPOSE,9.80" HT X 4.8" ... | 2.00 | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| | 004772 | | END-A-4-... | CONTACT:REPLACEMENT KIT,3A,600V,NEM... | 1.00 | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| | 002809 | | END-A-7-... | KIT,CONTACT | 1.00 | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| | 007839 | | END-A-7-... | SWITCH,LIMIT:10A @ 600V,DPDT,PLUNGER,... | 1.00 | EA | 05/05/2023 7:17 AM | ☐ | B | NOONDAY |
| | 007777 | | END-A-7-... | CONTROLLER:HACH SC200,-20 - 60 DEG C,... | 1.00 | EA | 05/05/2023 7:17 AM | ☐ | A | NOONDAY |

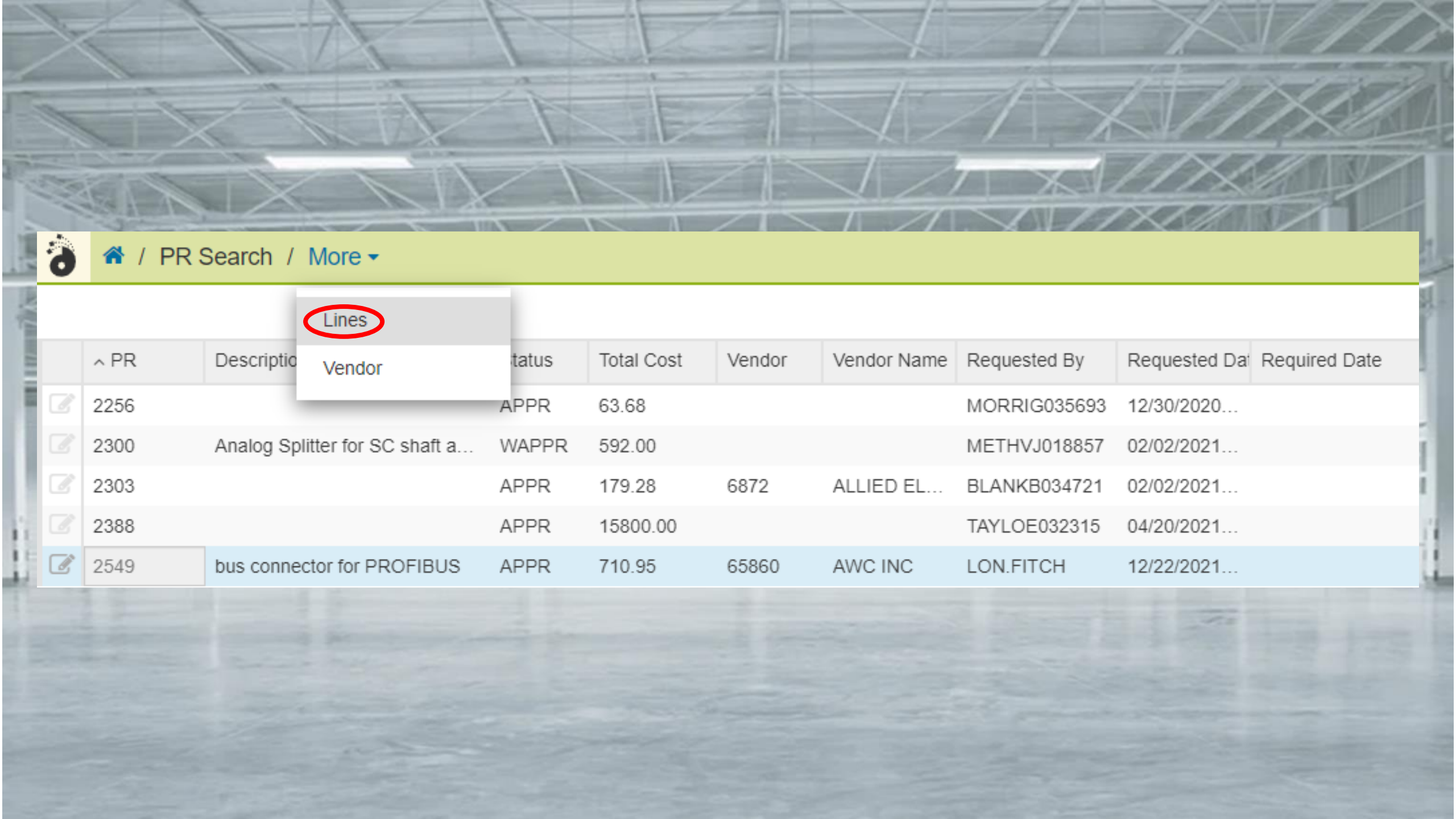
YOU GET AN ORDER
YOU GET AN ORDER
makeameme.org


Purchasing
PR Search
PO Search



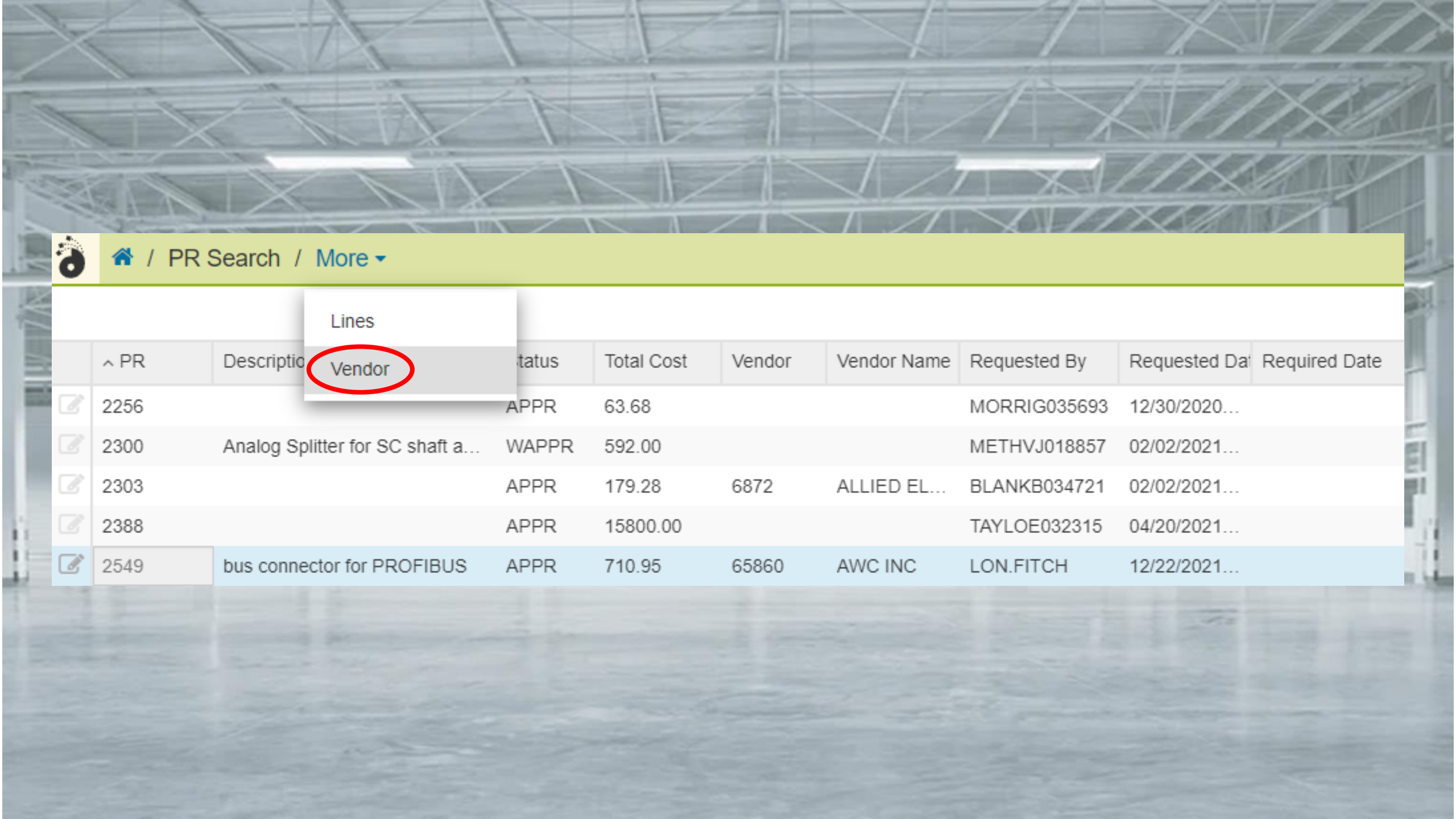
/ PR Search / More

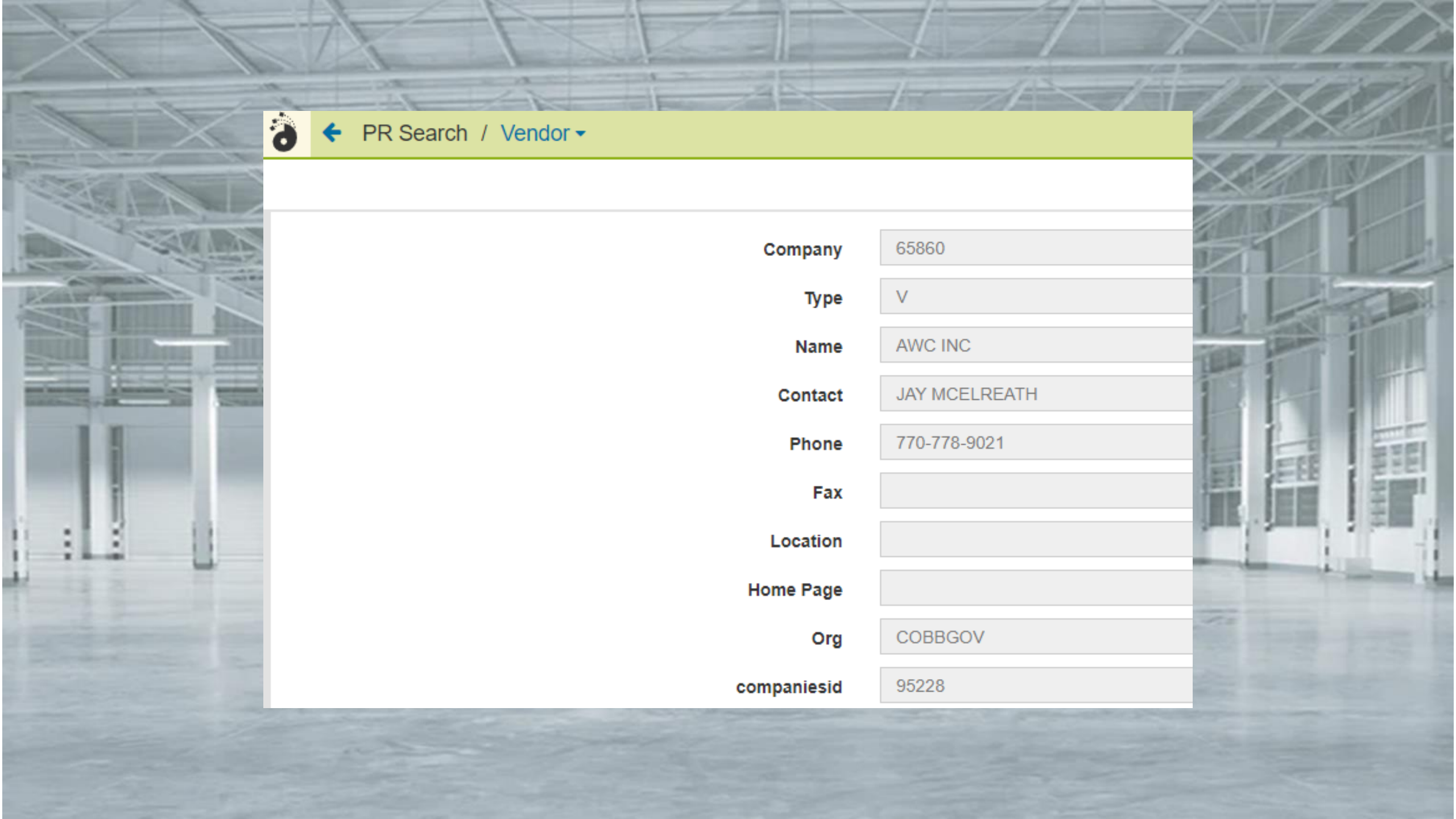
| | PR | Description | Status | Total Cost | Vendor | Vendor Name | Requested By | Requested Dat | Required Date |
|---|---|---|---|---|---|---|---|---|---|
| | 2256 | | APPR | 63.68 | | | MORRIG035693 | 12/30/2020... | |
| | 2300 | Analog Splitter for SC shaft a... | WAPPR | 592.00 | | | METHVJ018857 | 02/02/2021... | |
| | 2303 | | APPR | 179.28 | 6872 | ALLIED EL... | BLANKB034721 | 02/02/2021... | |
| | 2388 | | APPR | 15800.00 | | | TAYLOE032315 | 04/20/2021... | |
| | 2549 | bus connector for PROFIBUS | APPR | 710.95 | 65860 | AWC INC | LON.FITCH | 12/22/2021... | |

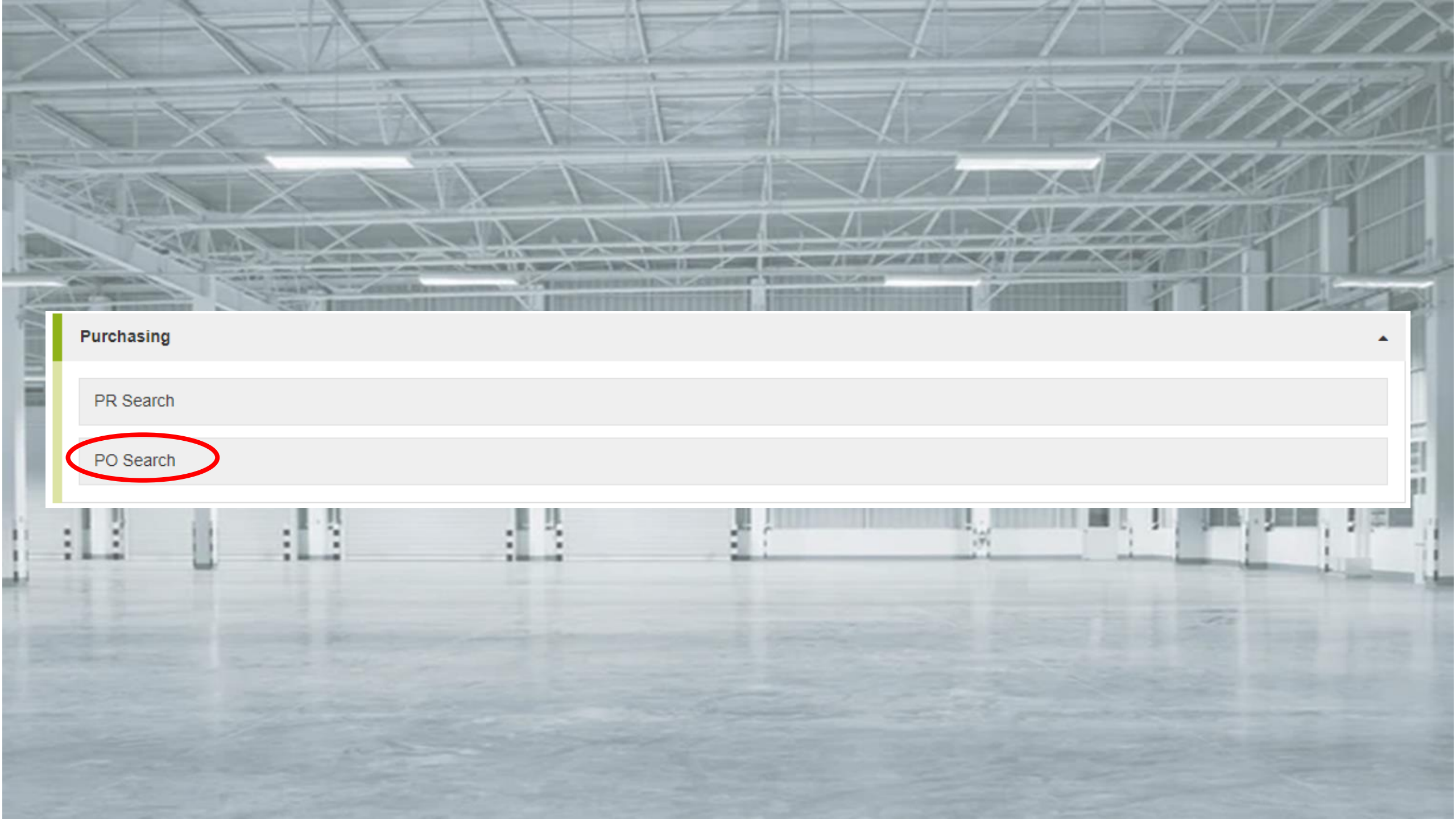

/ PR Search / More
Lines
Vendor
PR
Descriptio
tatus
Total Cost
Vendor
Vendor Name
Requested By
Requested Da
Required Date
2256
APPR
63.68
MORRIG035693
12/30/2020...
2300
Analog Splitter for SC shaft a...
WAPPR
592.00
METHVJ018857
02/02/2021...
2303
APPR
179.28
6872
ALLIED EL...
BLANKB034721
02/02/2021...
2388
APPR
15800.00
TAYLOE032315
04/20/2021...
2549
bus connector for PROFIBUS
APPR
710.95
65860
AWC INC
LON.FITCH
12/22/2021...

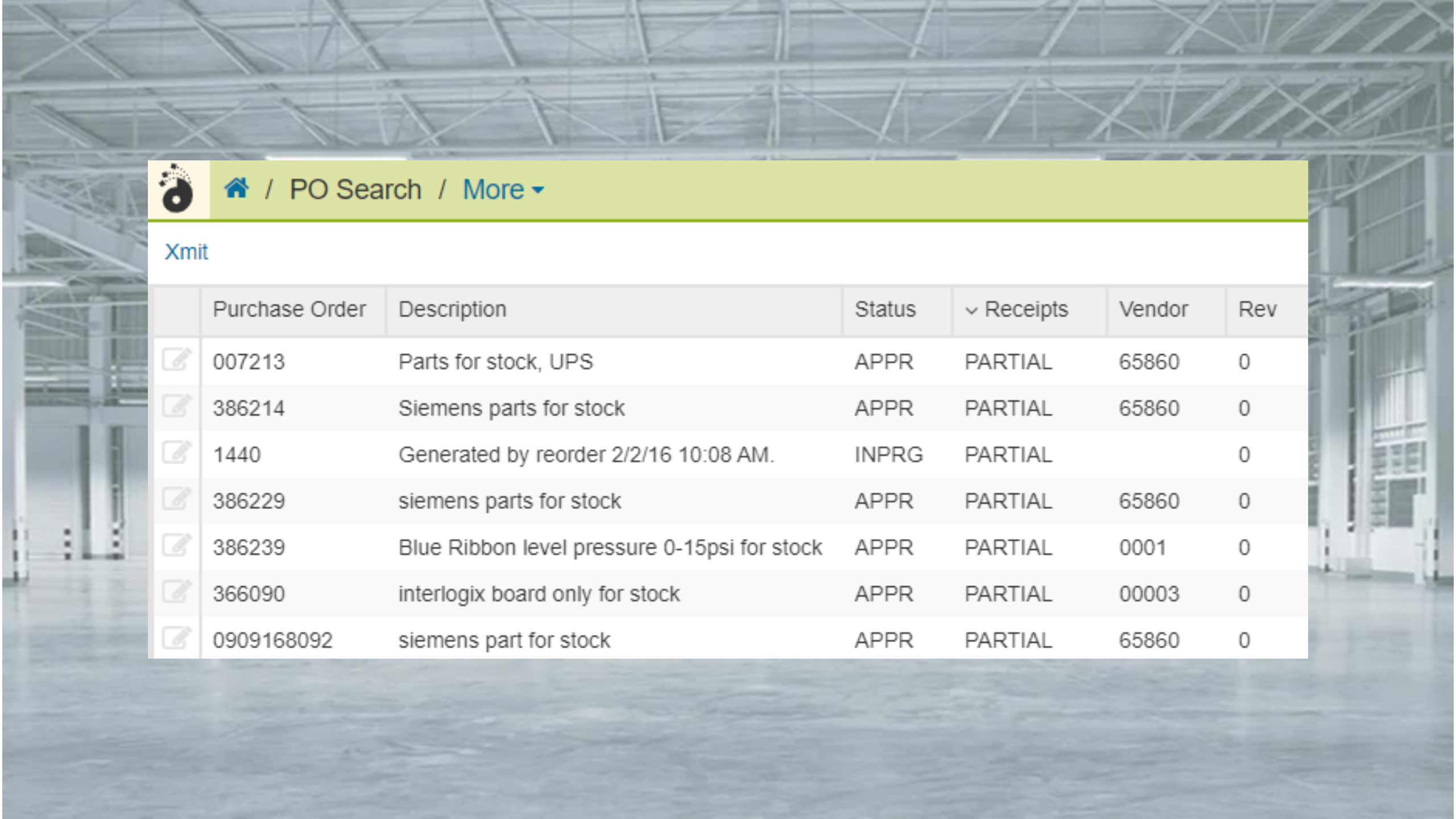
PR Search / Lines

| | Line | Description | Item | Order Quantity | Order Unit | Unit Cost | Storeroom | Work Order | Location | Asset | GL Debit |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | 1 | CONNECTOR,COMMUNICA... | 008677 | 8.00 | EA | 83.71 | TSG1 | | | | 500-500-5200-5206 |
| | 2 | Shipping | | 1.00 | | 41.27 | | | | | 500-500-5200-5206 |


/ PR Search / More
Lines
Vendor
PR
Descriptio
tatus
Total Cost
Vendor
Vendor Name
Requested By
Requested Da
Required Date
2256
APPR
63.68
MORRIG035693
12/30/2020...
2300
Analog Splitter for SC shaft a...
WAPPR
592.00
METHVJ018857
02/02/2021...
2303
APPR
179.28
6872
ALLIED EL...
BLANKB034721
02/02/2021...
2388
APPR
15800.00
TAYLOE032315
04/20/2021...
2549
bus connector for PROFIBUS
APPR
710.95
65860
AWC INC
LON.FITCH
12/22/2021...


PR Search / Vendor
Company
65860
Type
V
Name
AWC INC
Contact
JAY MCELREATH
Phone
770-778-9021
Fax
Location
Home Page
Org
COBBGOV
companiesid
95228

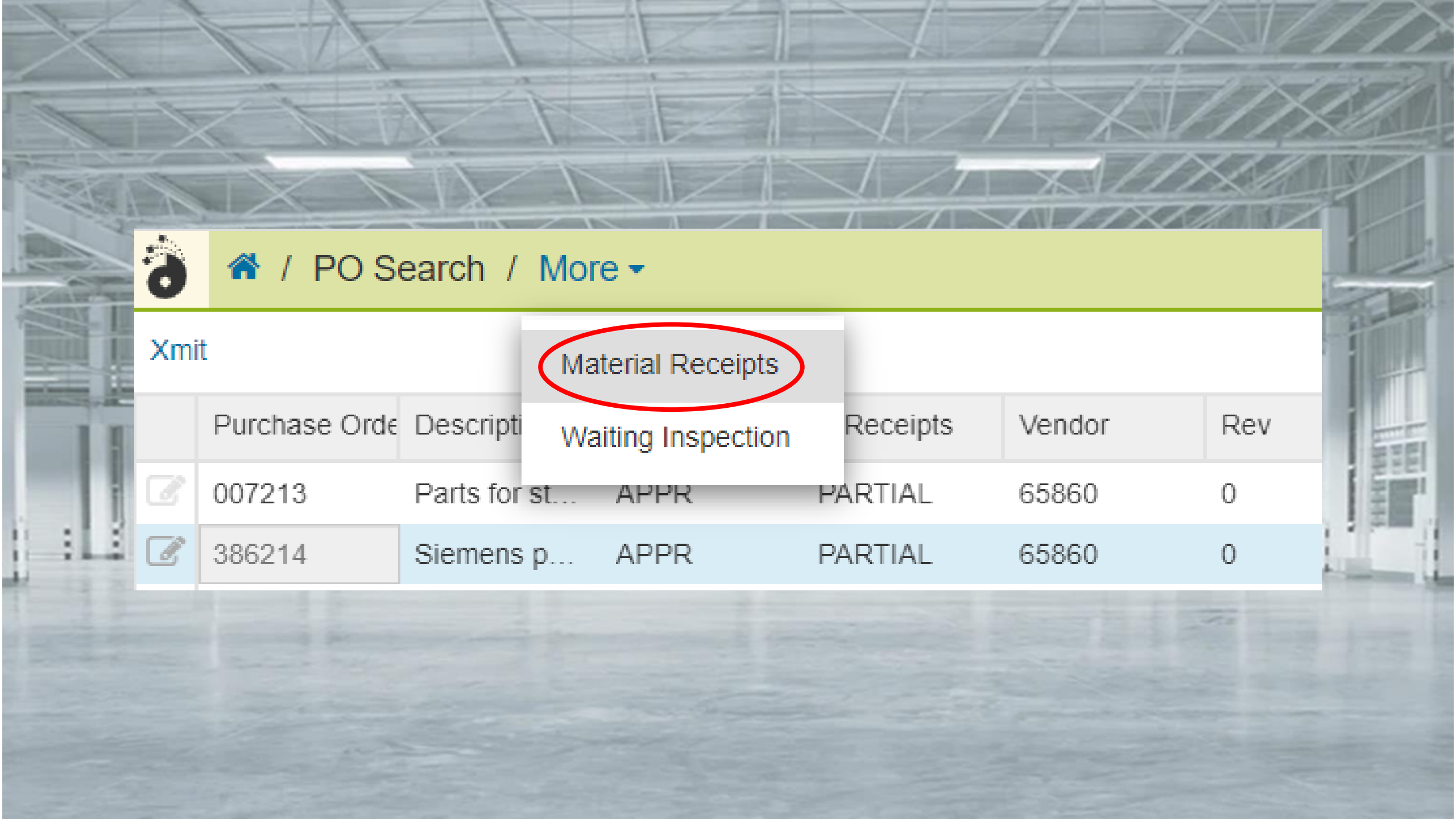

Purchasing
PR Search
PO Search

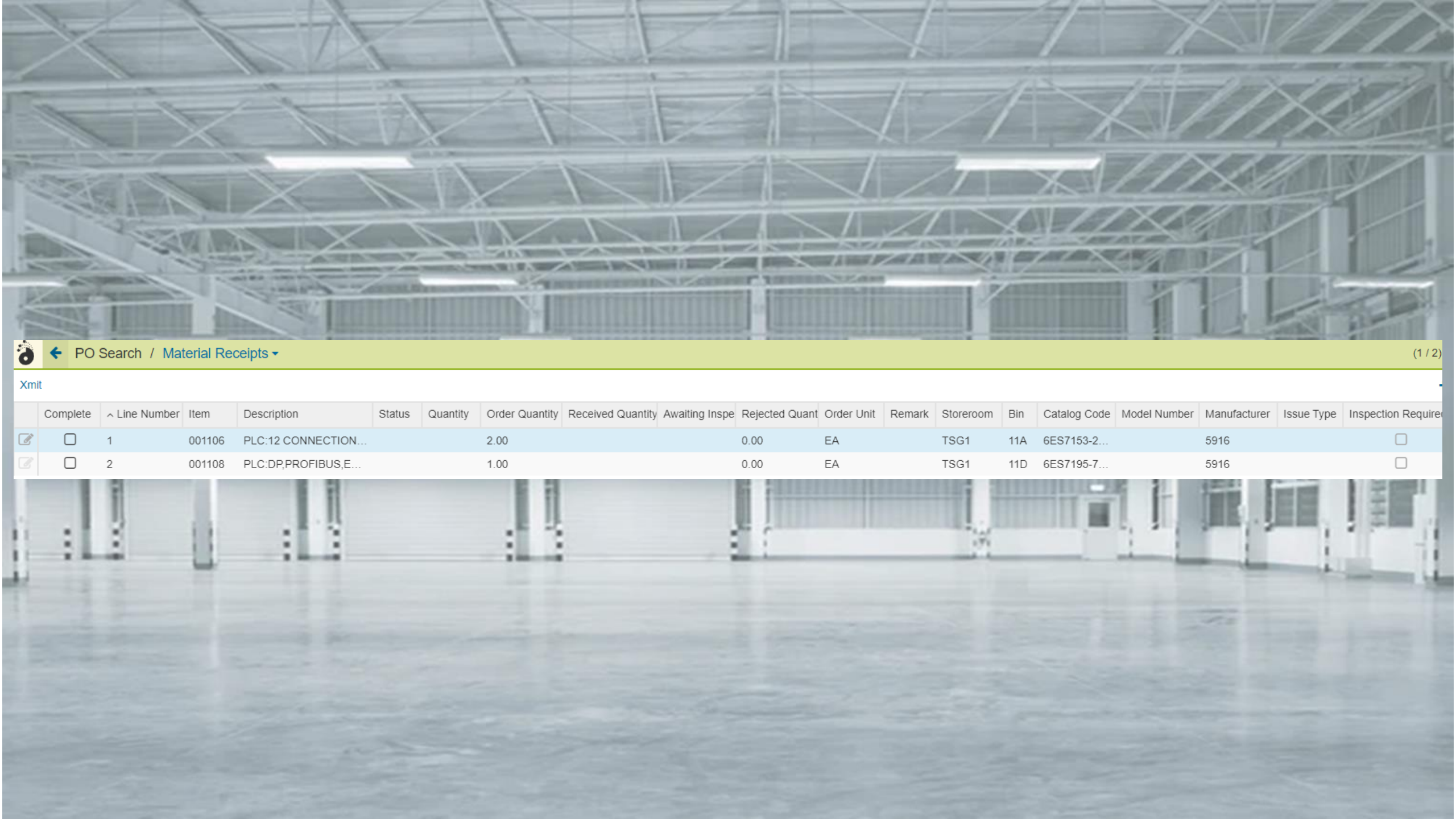


/ PO Search / More

Xmit

| | Purchase Order | Description | Status | Receipts | Vendor | Rev |
|---|---|---|---|---|---|---|
| | 007213 | Parts for stock, UPS | APPR | PARTIAL | 65860 | 0 |
| | 386214 | Siemens parts for stock | APPR | PARTIAL | 65860 | 0 |
| | 1440 | Generated by reorder 2/2/16 10:08 AM. | INPRG | PARTIAL | | 0 |
| | 386229 | siemens parts for stock | APPR | PARTIAL | 65860 | 0 |
| | 386239 | Blue Ribbon level pressure 0-15psi for stock | APPR | PARTIAL | 0001 | 0 |
| | 366090 | interlogix board only for stock | APPR | PARTIAL | 00003 | 0 |
| | 0909168092 | siemens part for stock | APPR | PARTIAL | 65860 | 0 |


/ PO Search / More
Xmit
Material Receipts
Waiting Inspection
Purchase Orde
Descripti
Receipts
Vendor
Rev
007213
Parts for st...
APPR
PARTIAL
65860
0
386214
Siemens p...
APPR
PARTIAL
65860
0

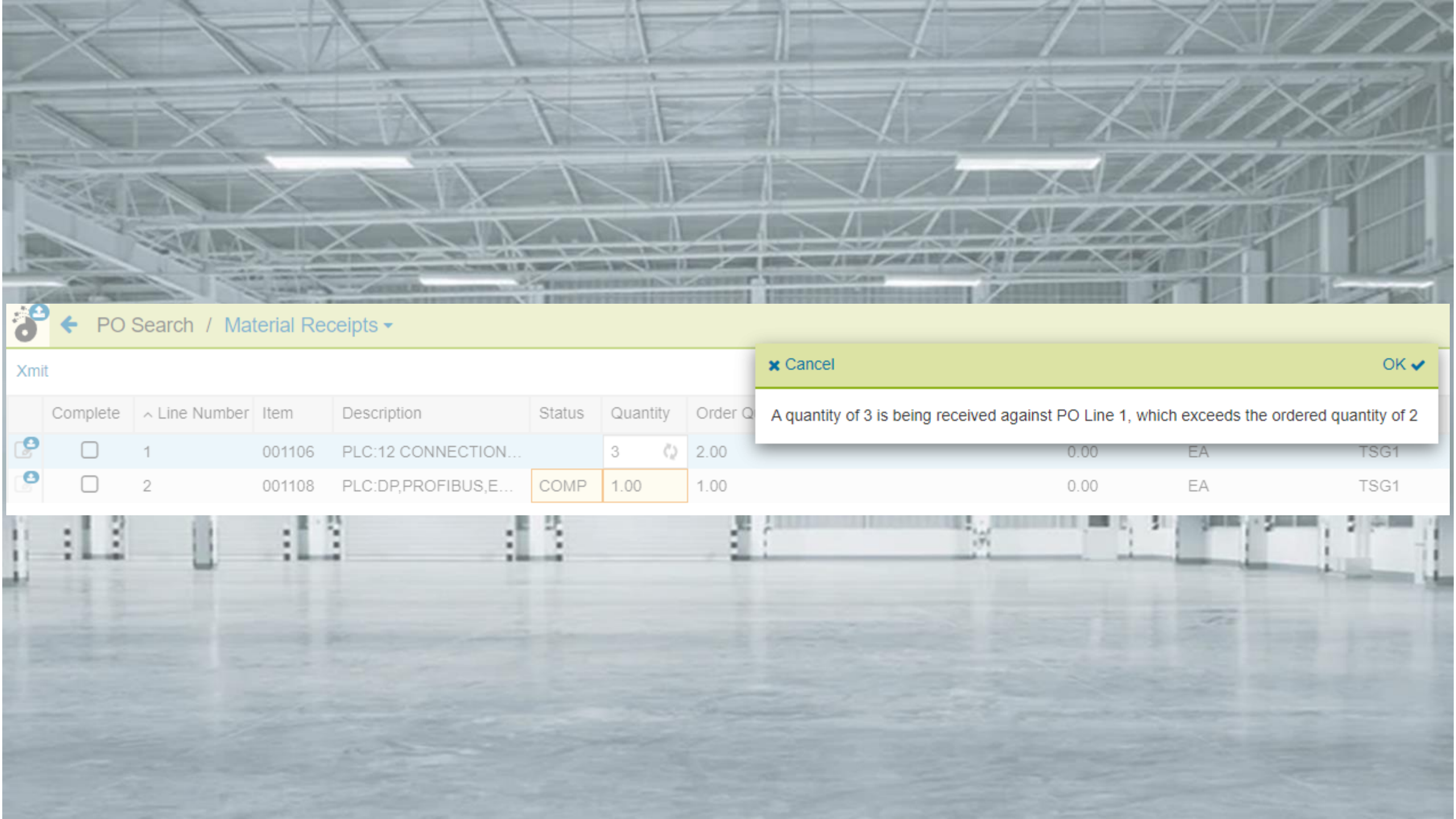


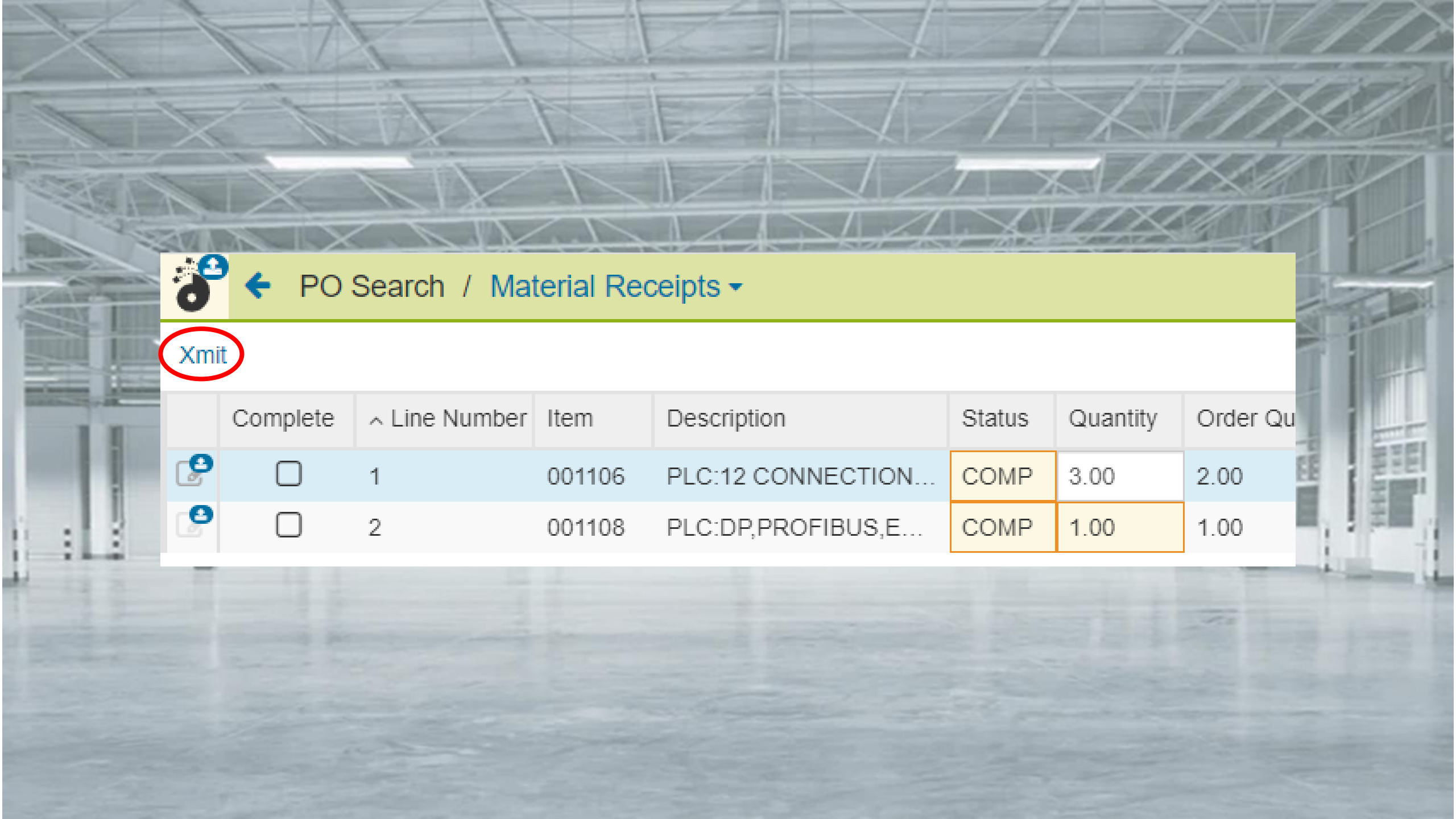
PO Search / Material Receipts (1 / 2)

Xmit

| Complete | Line Number | Item | Description | Status | Quantity | Order Quantity | Received Quantity | Awaiting Inspe | Rejected Quant | Order Unit | Remark | Storeroom | Bin | Catalog Code | Model Number | Manufacturer | Issue Type | Inspection Require |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ☐ | 1 | 001106 | PLC:12 CONNECTION… | | | 2.00 | | | 0.00 | EA | | TSG1 | 11A | 6ES7153-2… | | 5916 | | ☐ |
| ☐ | 2 | 001108 | PLC:DP,PROFIBUS,E… | | | 1.00 | | | 0.00 | EA | | TSG1 | 11D | 6ES7195-7… | | 5916 | | ☐ |

PO Search / Material Receipts
Xmit
Complete
Line Number
Item
Description
Status
Quantity
Order Quantity
Received Quantity
1
001106
PLC:12 CONNECTION...
1.00
2.00
2
001108
PLC:DP,PROFIBUS,E...
COMP
1.00
1.00


PO Search / Material Receipts
Xmit
Cancel
OK
A quantity of 3 is being received against PO Line 1, which exceeds the ordered quantity of 2
Complete
Line Number
Item
Description
Status
Quantity
Order Q
1
001106
PLC:12 CONNECTION...
3
2.00
0.00
EA
TSG1
2
001108
PLC:DP,PROFIBUS,E...
COMP
1.00
1.00
0.00
EA
TSG1


PO Search / Material Receipts
Xmit
Complete
Line Number
Item
Description
Status
Quantity
Order Qu
1
001106
PLC:12 CONNECTION...
COMP
3.00
2.00
2
001108
PLC:DP,PROFIBUS,E...
COMP
1.00
1.00

COBB COUNTY
STATE OF GEORGIA
1832

*Cobb County...Expect the Best!*

COBB COUNTY
1832
OF GEO
THANK YOU
Cobb County...Expect the Best!

# IBM Maximo Application Suite Overview

## Manage Roadmap

June 2023

Dave Gasdia
Program Director
IBM Maximo Product Management
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.
- 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.

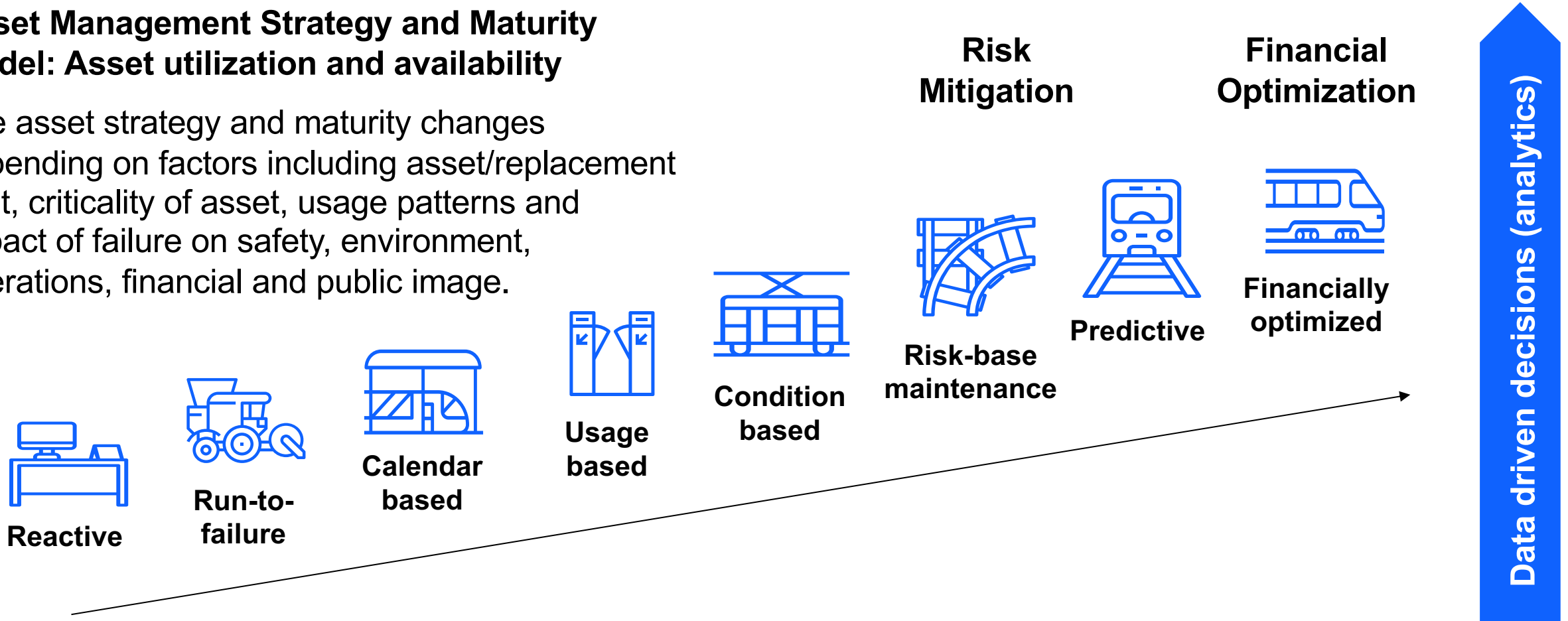
# Roadmap Topics

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

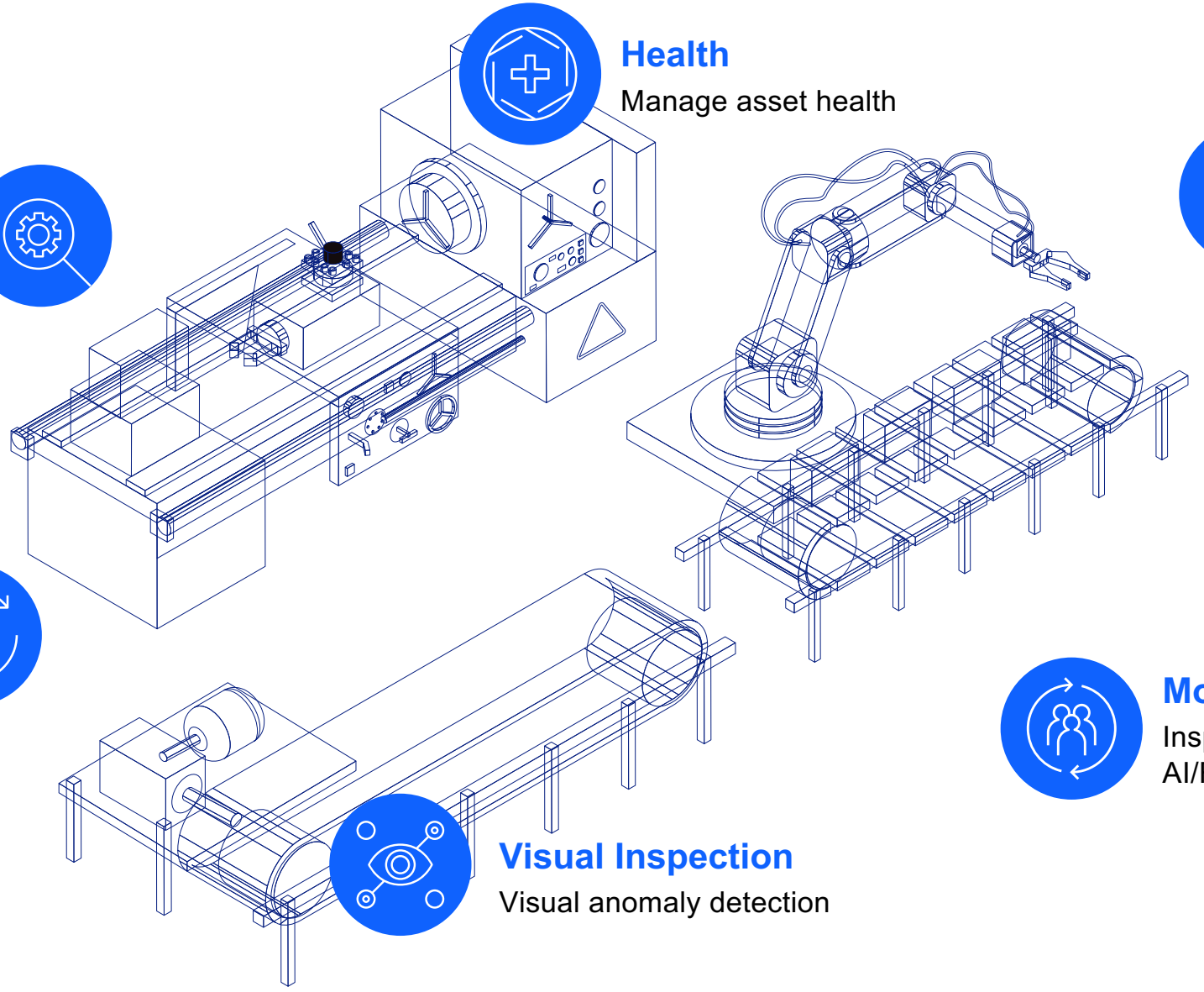
# Maintenance strategies differ by asset class

**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.



# Driving the Automation Journey



**Health**
Manage asset health

**Monitor**
Manage and
detect anomalies

**Predict**
Use data
to predict failures

**Manage**
Understand and
manage maintenance

**Mobile**
Inspect Work Execution
AI/Remote Assist

**Visual Inspection**
Visual anomaly detection

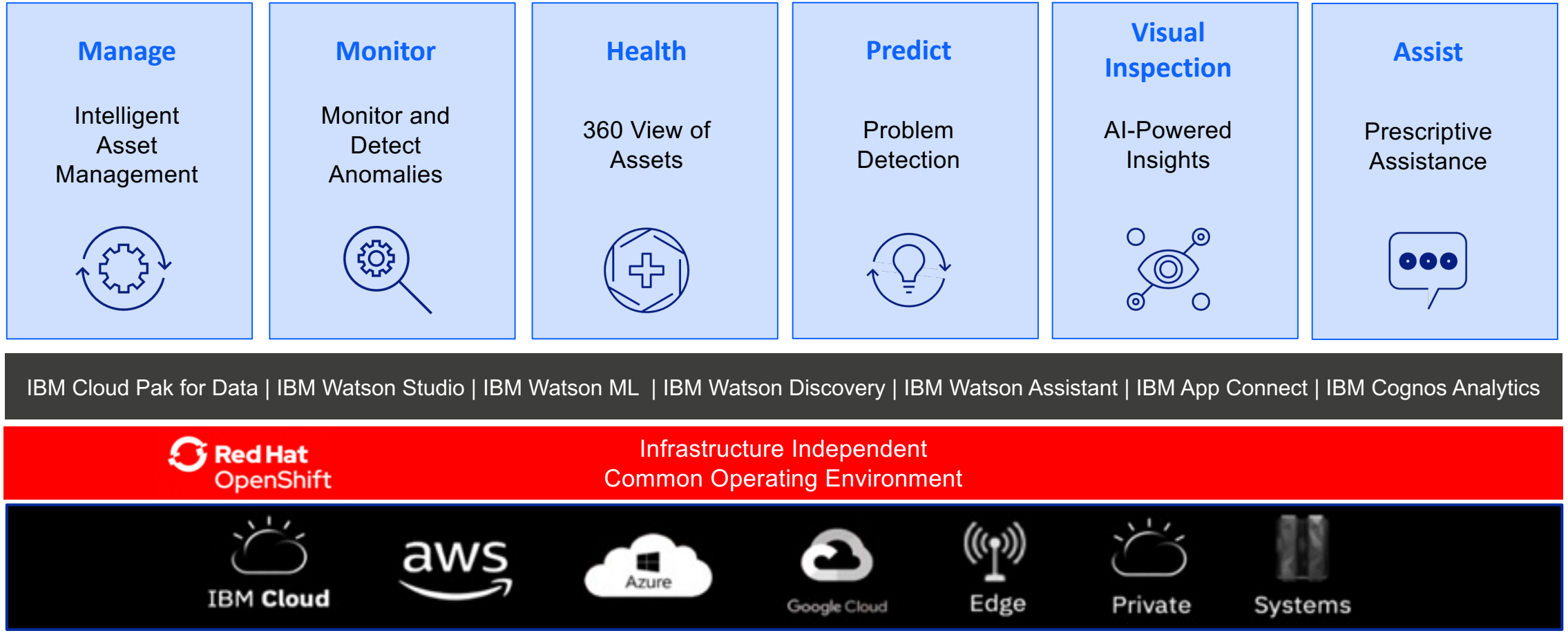
# Maximo Application Suite

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*



# Maximo Application Suite Deployment Options

| Deployment | Availability | Procure | Provision & Operate | Client Benefits |
|---|---|---|---|---|
| **On Premise**<br>Customer Managed | **Now** | Client purchases MAS from IBM<br>Client provides infrastructure | Client provisions, manages, and operates full stack | • Maximum operational flexibility |
| **Hyperscalers**<br>Customer Managed | **Now**<br>AWS 1Q22<br>Azure 2Q22 | **BYOL**<br>Client purchases software from IBM and infrastructure from Hyperscalers | Client runs IBM-provided automation scripts to deploy MAS on Hyperscalers' cloud<br>Client manages and operates both software and infrastructure | • Simplifies procurement and deployment<br>• Allows client to select their Hyperscalers<br>• Flexibility for clients to manage and operate their environment |
| | **Now**<br>AWS 3Q22<br>Azure 4Q22 | **Paid (Marketplace listing)**<br>Client purchases software and infrastructure from Hyperscalers | | |
| **SaaS**<br>IBM Managed | **Now**<br>AWS 3Q22 | Client purchase single part (includes software, infrastructure, and operations) from either 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 | • Reduced time-to-value<br>• Reduced operational costs<br>• Allows clients to focus on business priorities |
| **Dedicated (Managed Service)**<br>IBM Managed | **Now**<br>IBM 2021<br>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. | • Simplifies deployment and operations<br>• Provides more flexibility, than SaaS, to customize environment<br>• Provides more operational flexibility than SaaS |

# Maximo Application Suite Catalog

## MAS Applications

- **Manage** (Sch, Lin, Cal)
- **Monitor**
- **Health**
- **Predict**
- **Visual Inspection**
- **Assist**

## MAS Industry Solutions

- **Manage** Transportation
- **Manage** Nuclear
- **Manage** Utilities
- **Manage** Oil & Gas
- **Manage** Aviation
- **Manage** Civil Infrastructure
- **Health, Predict Utilities**

## MAS Add-on Solutions

- **Manage** Asset Configuration Manager
- **Manage** Health, Safety & Environment
- **Manage** Service Provider
- **Manage** Maximo Mobile
- **Manage** Spatial
- **Manage** ERP Connector for SAP
- **Manage** ERP Connector for Oracle
- **Manage** WorkDay Connector
- **Maximo** Optimizer
- **Manage** TRIRIGA and Envizi Connectors
- Cognos Analytics

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

- Parts Identifier
- *Coming soon….* **Maximo** IT

# 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**

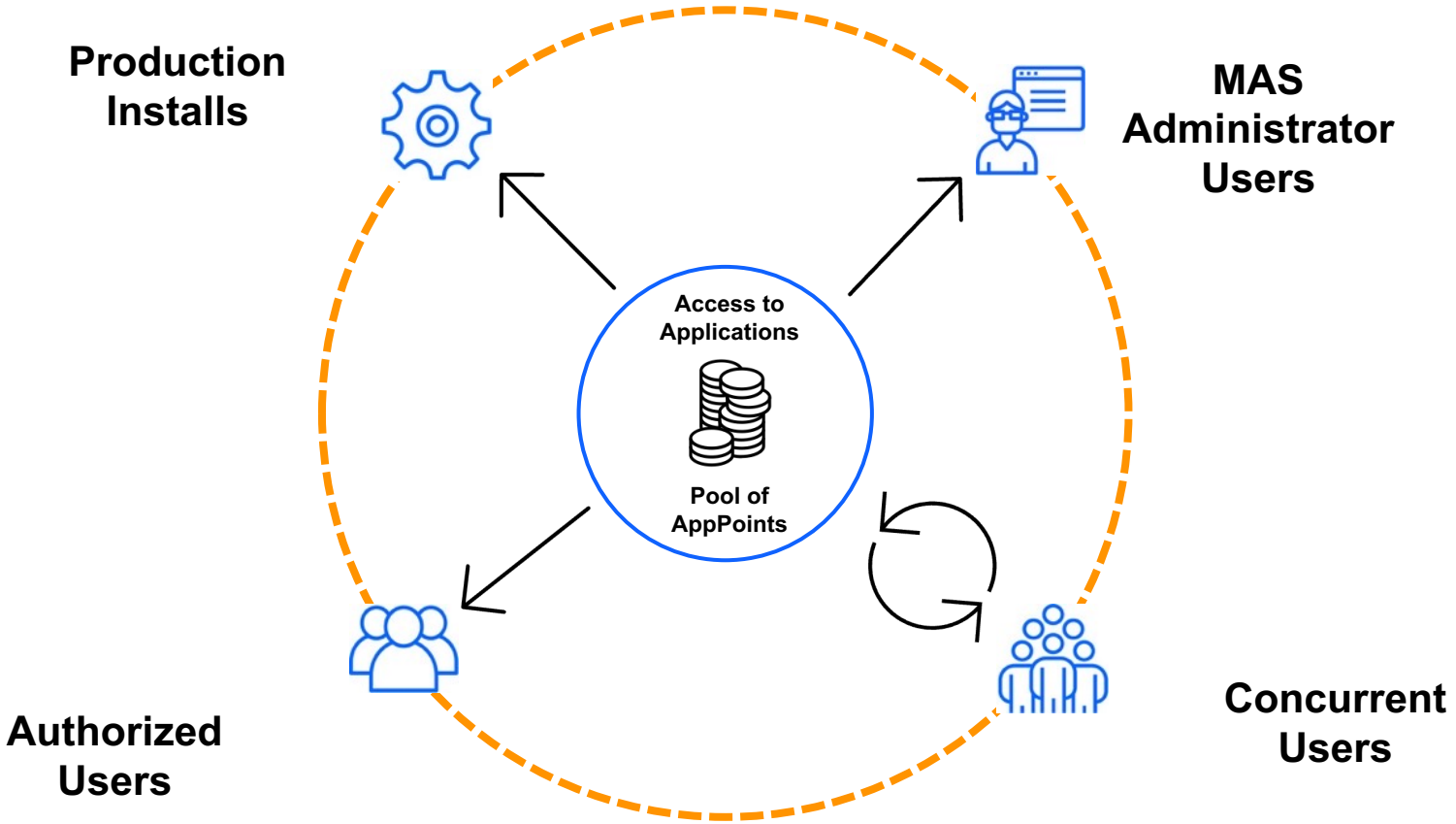
One entitlement to entire Suite

**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
**5**
**AppPoints**

Authorized
**2**
**AppPoints**

3 Modules:
- Manage
- Manage Industry Solutions
- Manage Add-ons

Mobile
- Maximo Mobile
- Assist
- 3rd Party

Monitor

## Base User

Concurrent
**10**
**AppPoints**

Authorized
**3**
**AppPoints**

Manage
Includes:
- Linear
- Calibration
- Spatial (requires install)
- Scheduler

Health

## Premium User

Concurrent
**15**
**AppPoints**

Authorized
**5**
**AppPoints**

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

**Install – 1 AppPoint**
**(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

**Manage**

Intelligent Asset Management

**Monitor**

Monitor and Detect Anomalies

**Health**

360 View of Assets

**Predict**

Predictive Failures

**Visual Inspection**

AI-Powered Insights

**Schedule**

Schedule Work and Resources

**Mobile**

Technician Work Execution

**Assist**

Prescriptive Assistance

**Industry Solutions**

Accelerate Time to Value

IBM Sustainability Software / © 2023 IBM Corporation

## Intelligent Enterprise Asset Management solution to help organizations:

1 Manage assets, infrastructure, and resources

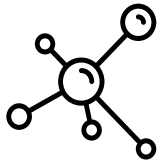
2 Monitor and measure operations

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

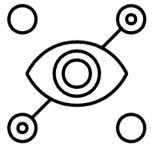
### Reduce fleetwide operational risk by focusing on the right assets

- 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 8.z Q1 2024

Role Based Apps
- Scheduler/Dispatcher enhancements
- Operational Dashboard
  - HSE enhancements
- New Dataloader

MAF Configuration
- Tool Pallette
- DataSource Assignment
- Data Dictionary Searching

Manage Mobile Apps
- Current Mobile App enhancements
- Desktop Requisition

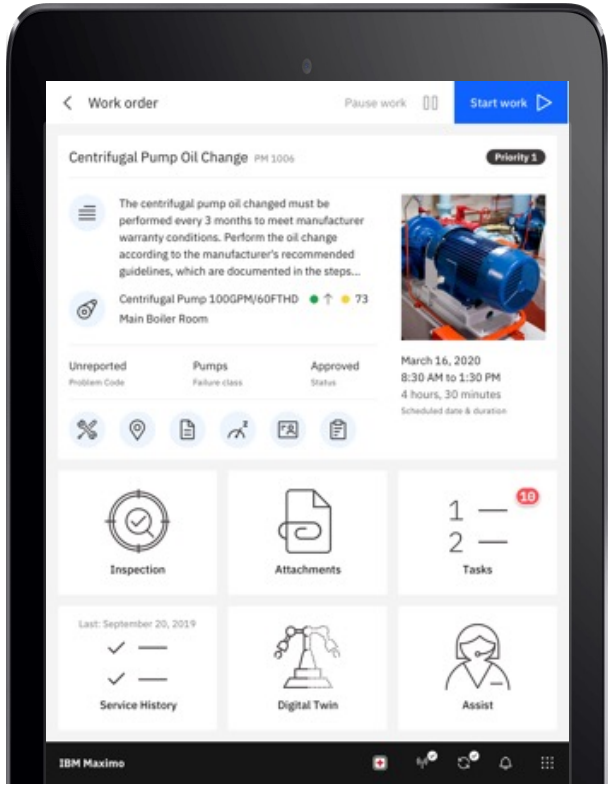
Serviceability /Security/Currency
- Operator maturity model enhancements

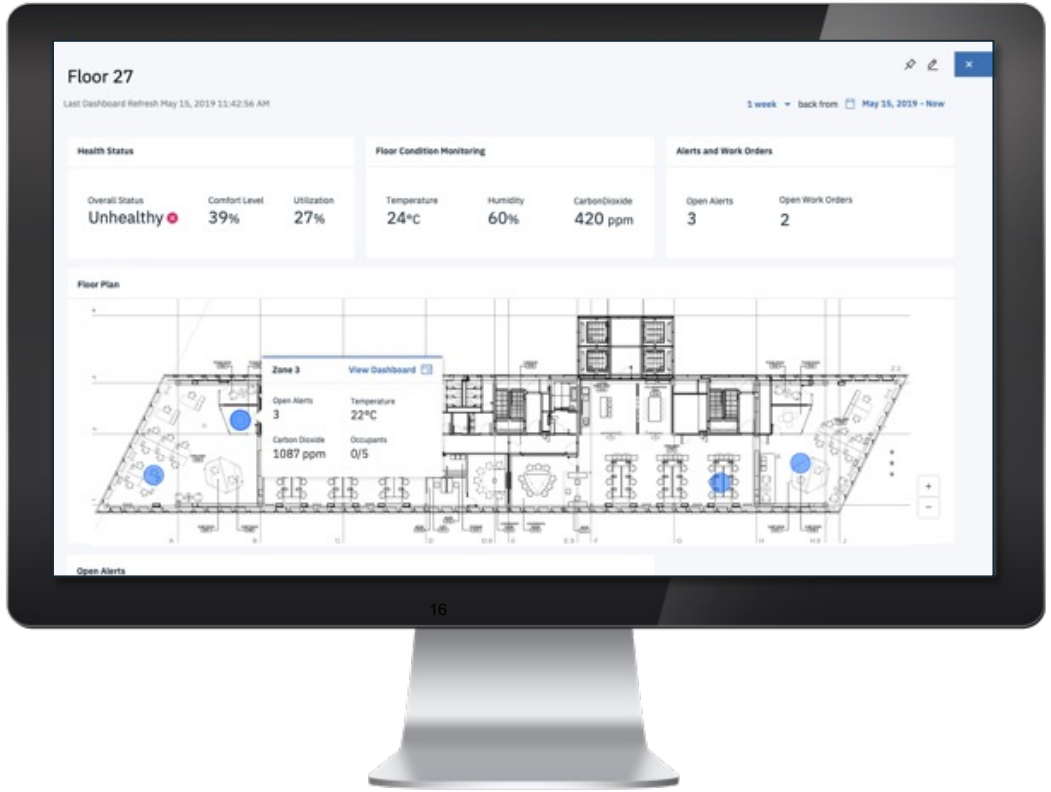
IS enhancements
- RBA and mobile apps
- Civil Infrastructure enhancements

Notice: IBM's statements regarding its plans, directions, and intent are subject to change or withdrawal 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. 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.

# Modernized User Interface

*Easy navigation, common controls and visualization*



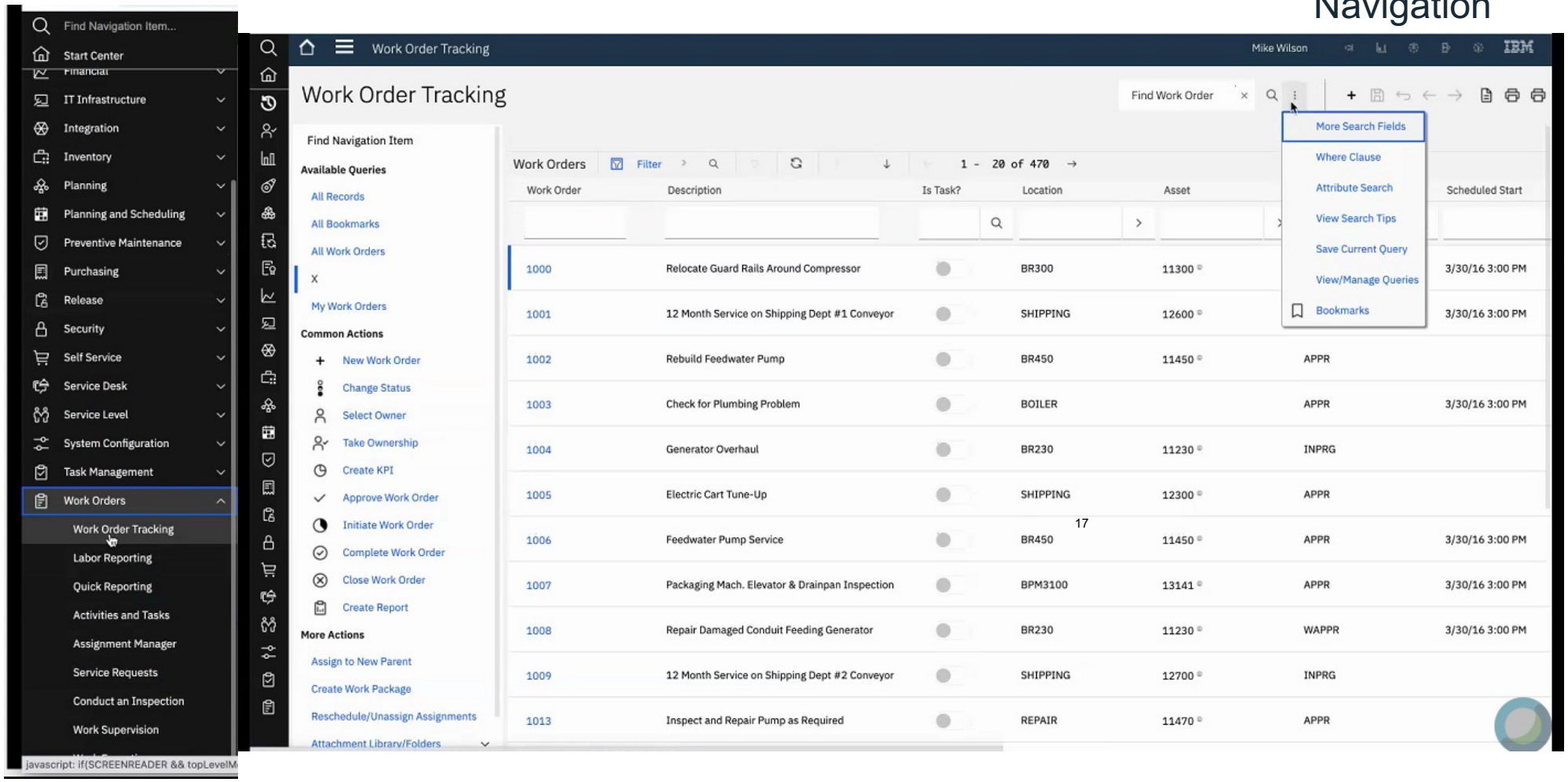



# Updated Look and Feel

- *Maximo Application Suite Manage*

Collapsed Left side Navigation allows more screen real estate

Updated Search Navigation



# Updated Look and Feel

## - *Maximo Application Suite Manage*

### Continues to support previous features

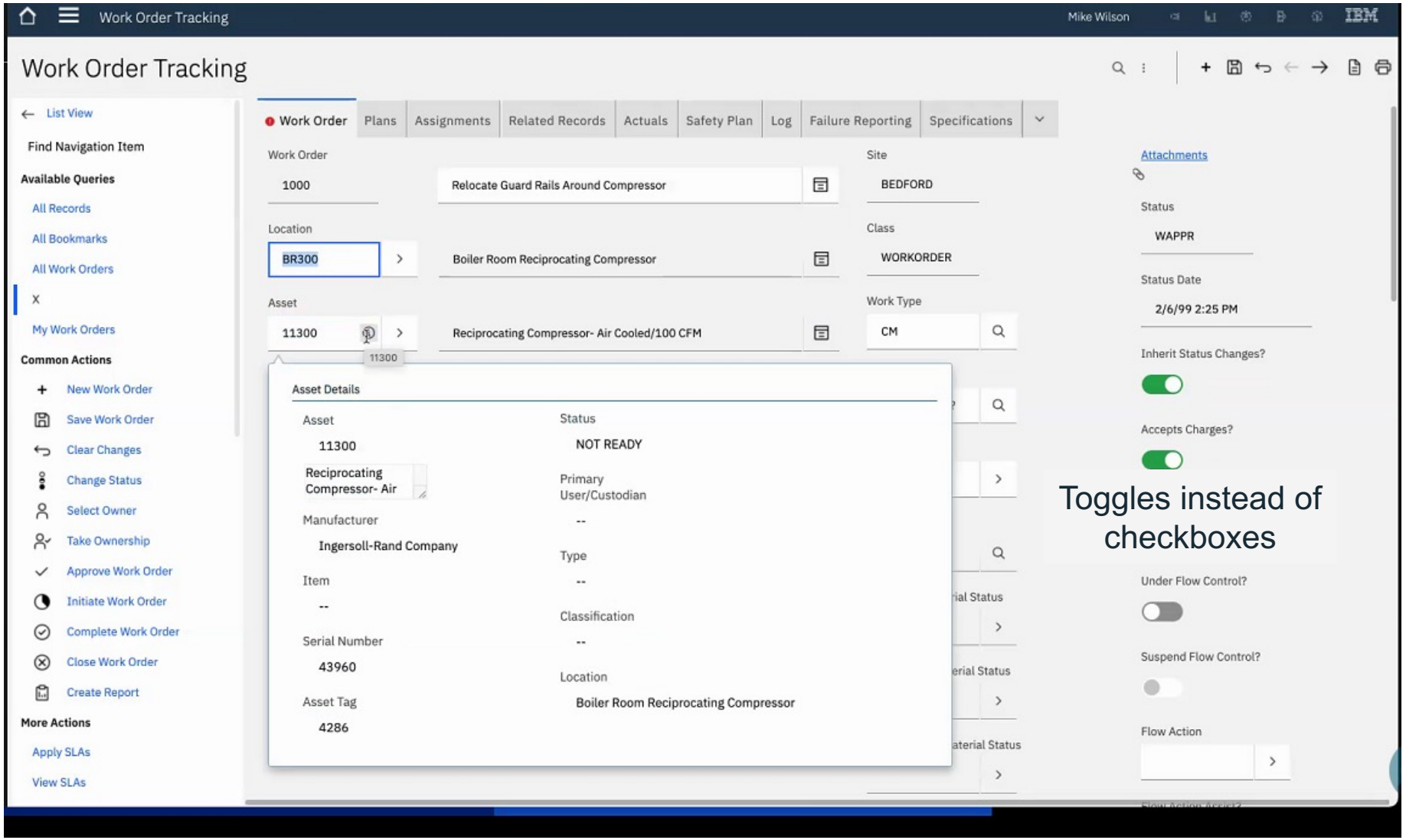
- Application Designer
- Conditional UI

### New Capabilities:

Table Window details embedded

### Removed properties file options

- Skin
- Dynamicfontsize
- Vericallabels
- showOnToolbar



# Reporting Updates

## BIRT

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

## Cognos

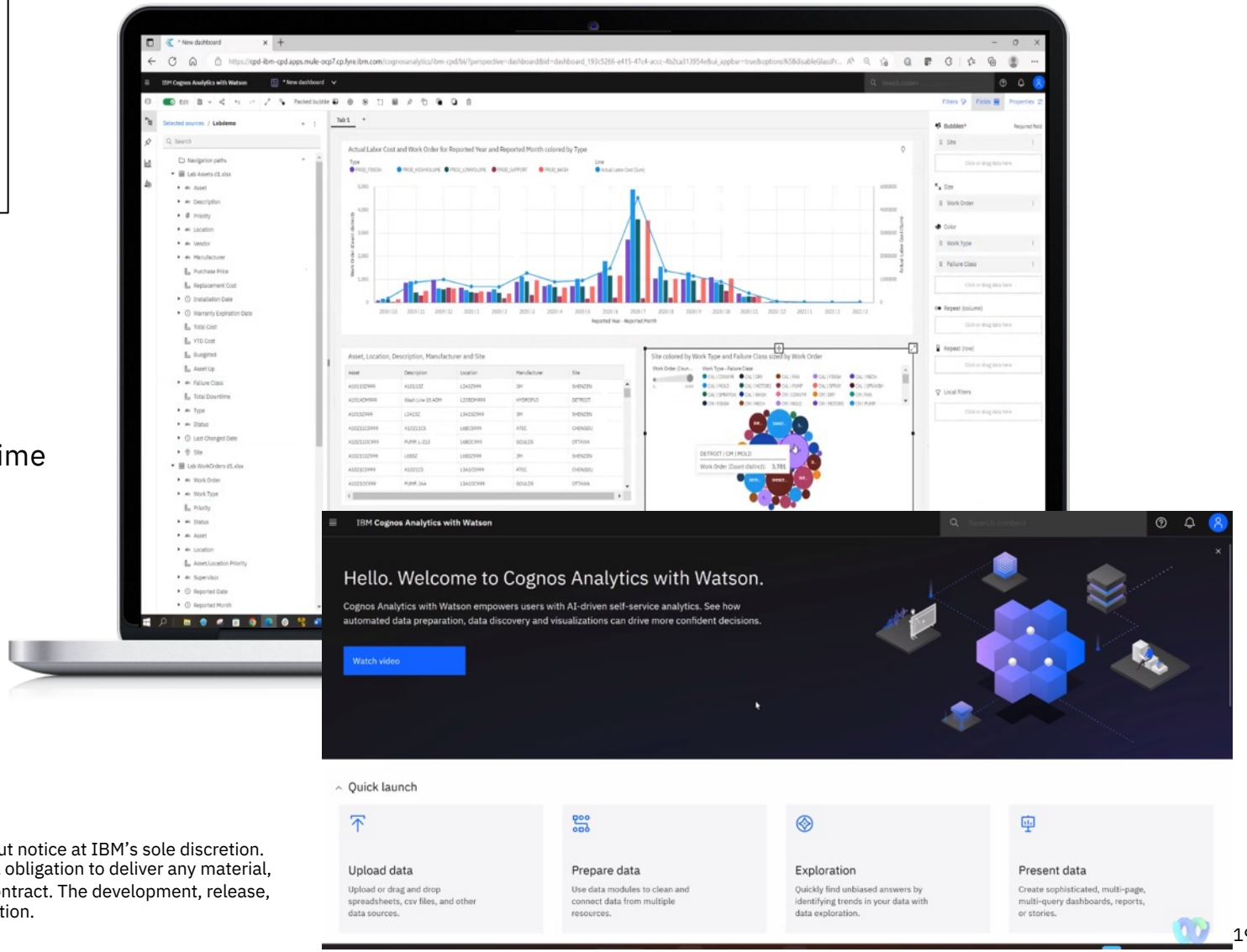
- Adding Cognos to the Maximo Application Suite (Available with MAS 8.10)

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

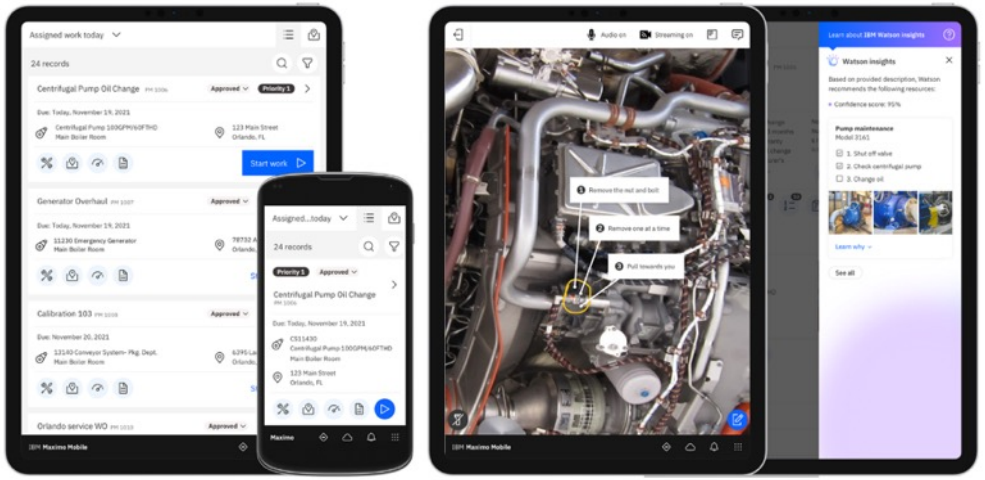



IBM's statements regarding its plans, directions, and intent are subject to change or withdrawal without notice at IBM's sole discretion. The information mentioned regarding potential future products is not a commitment, promise, or legal obligation to deliver any material, code or functionality. Information 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.

# 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:

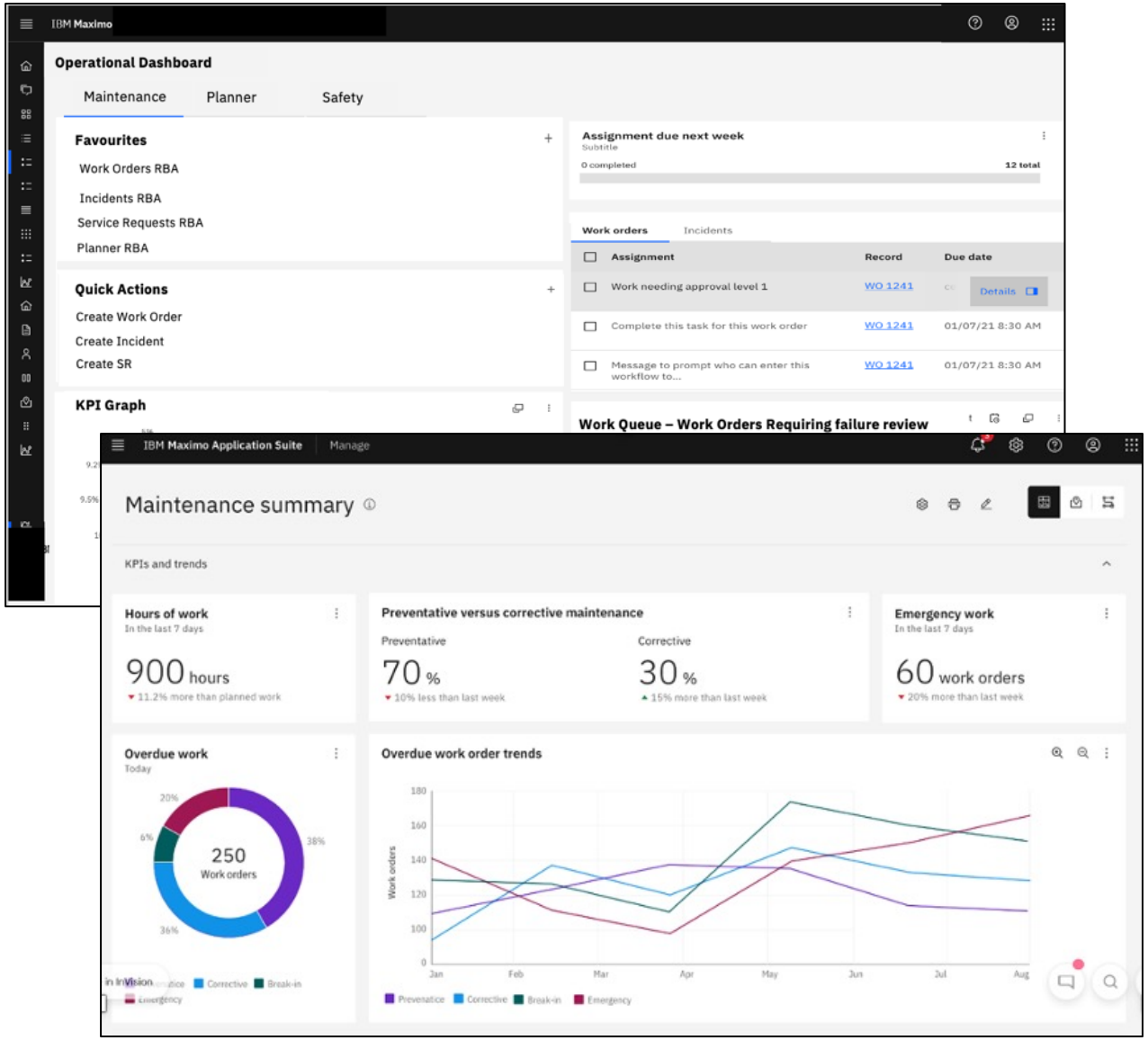
- Increased Productivity
- Actionable Dashboards
- Data accuracy
- First Time Fix Rates

# Role Based Applications

## Next Generation User Experience

Available

- Actionable Dashboards to improve efficiencies
- Intelligent workflows
- Configurability
- Built on Maximo Application Framework
- Connected




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.

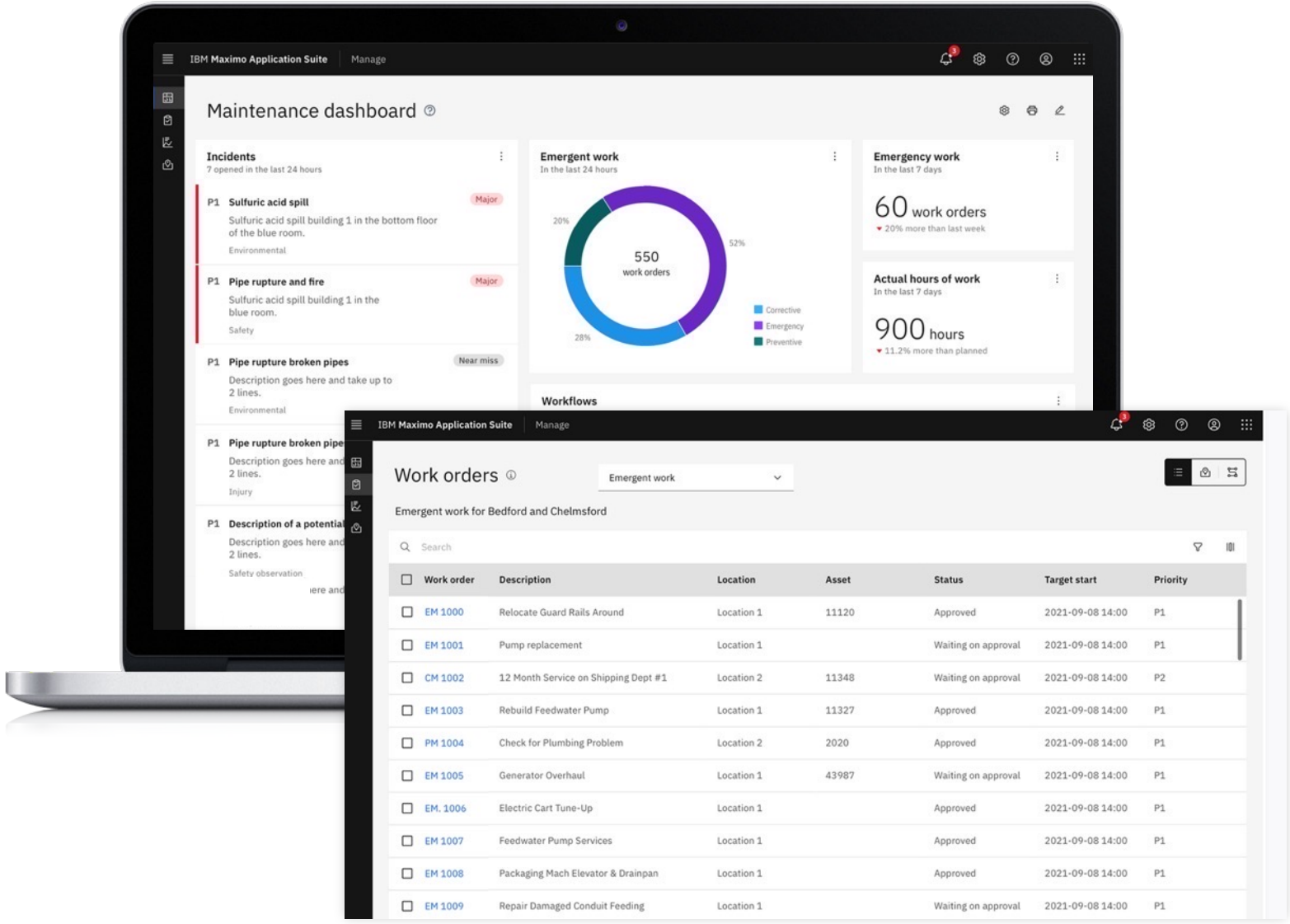
# Operational Dashboard

- *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.



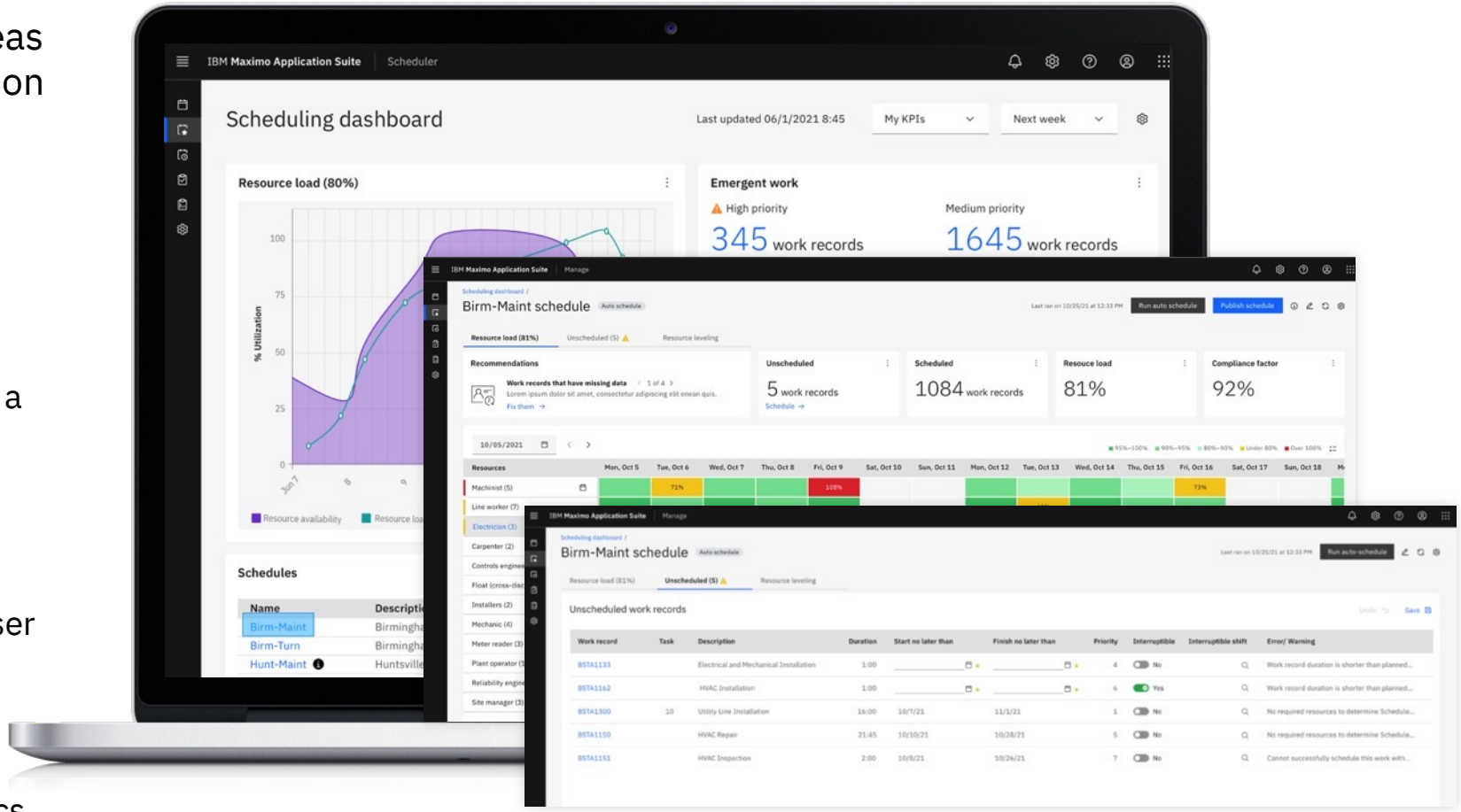
# Scheduling Dashboard

*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



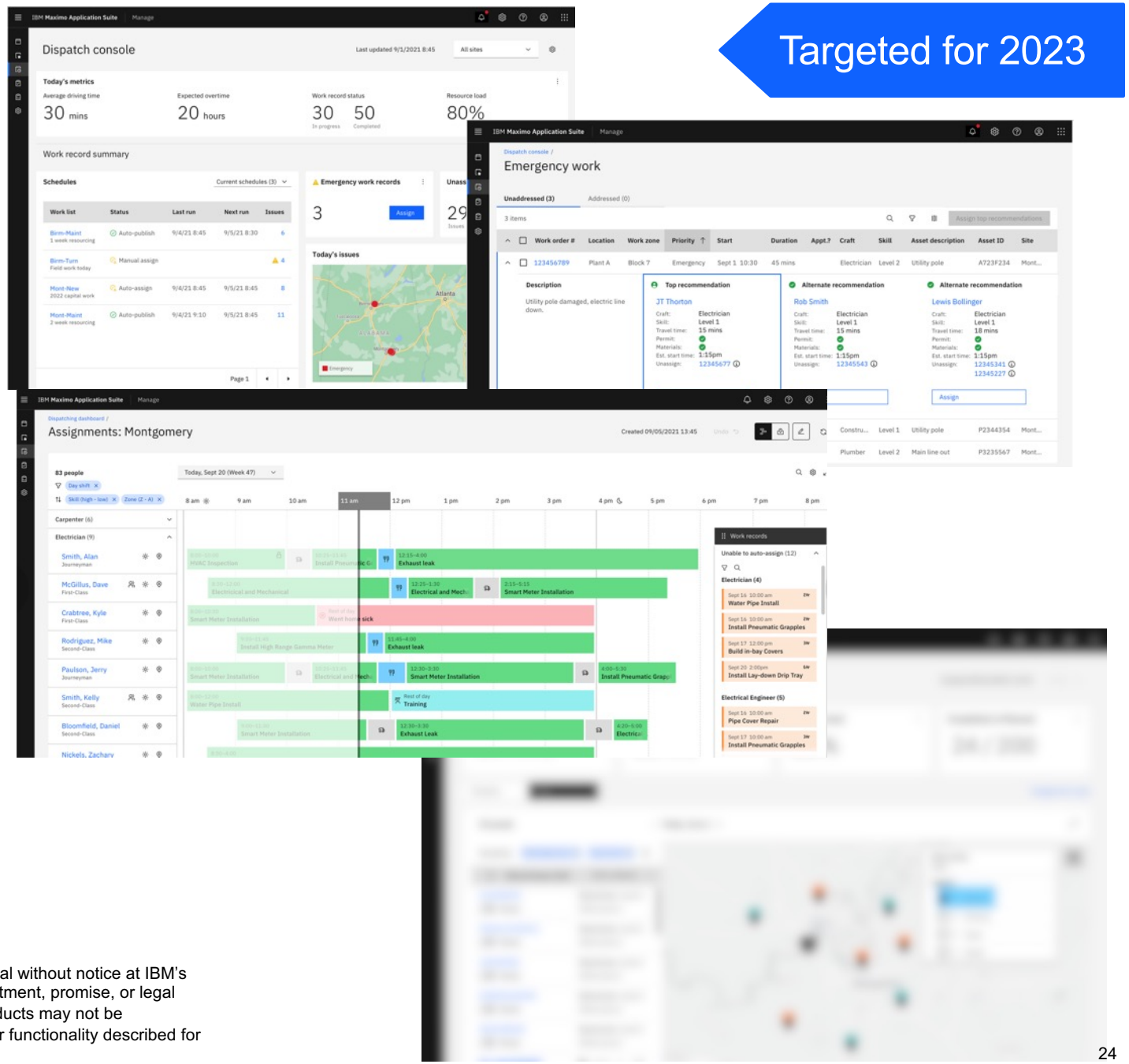
# Dispatching Dashboard
*Role Based Application*

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




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.

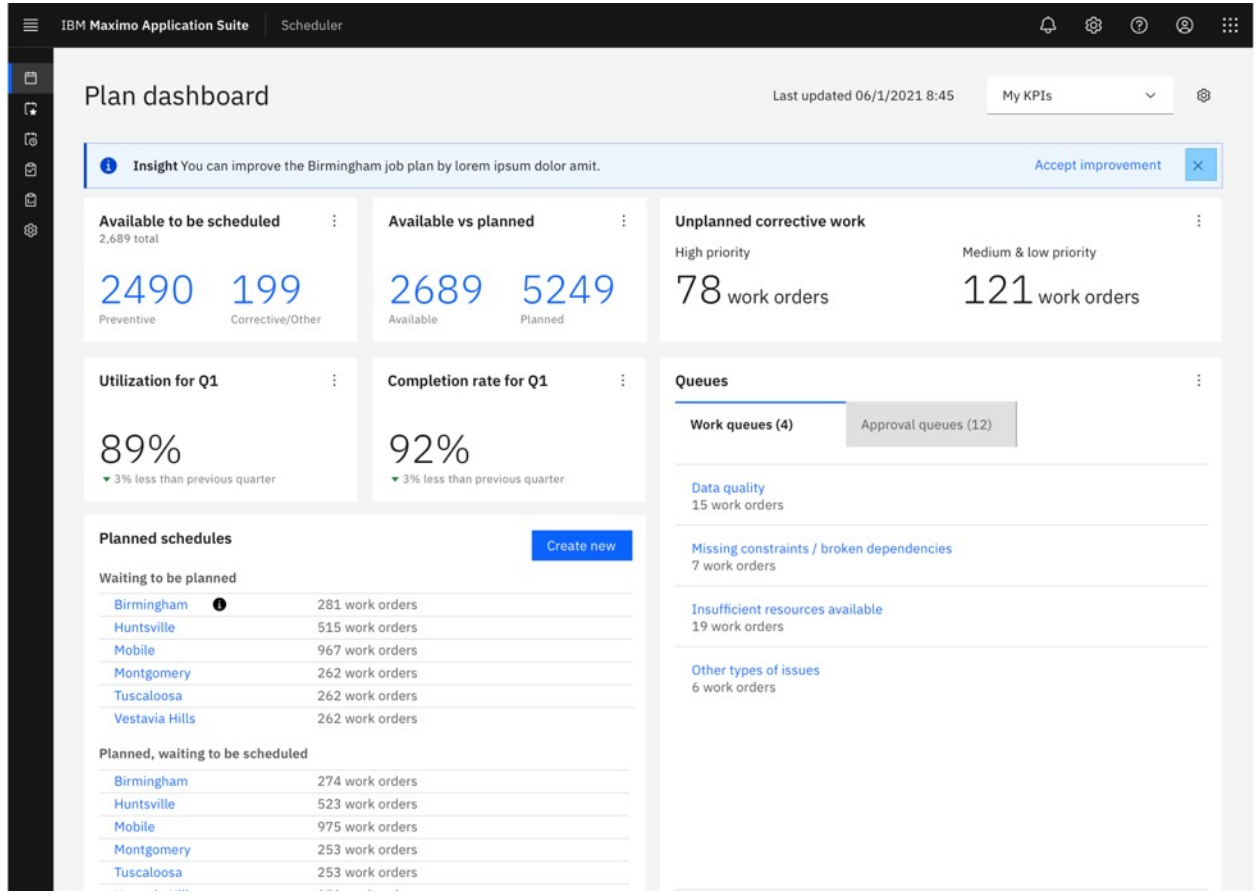
# Planning Dashboard

*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



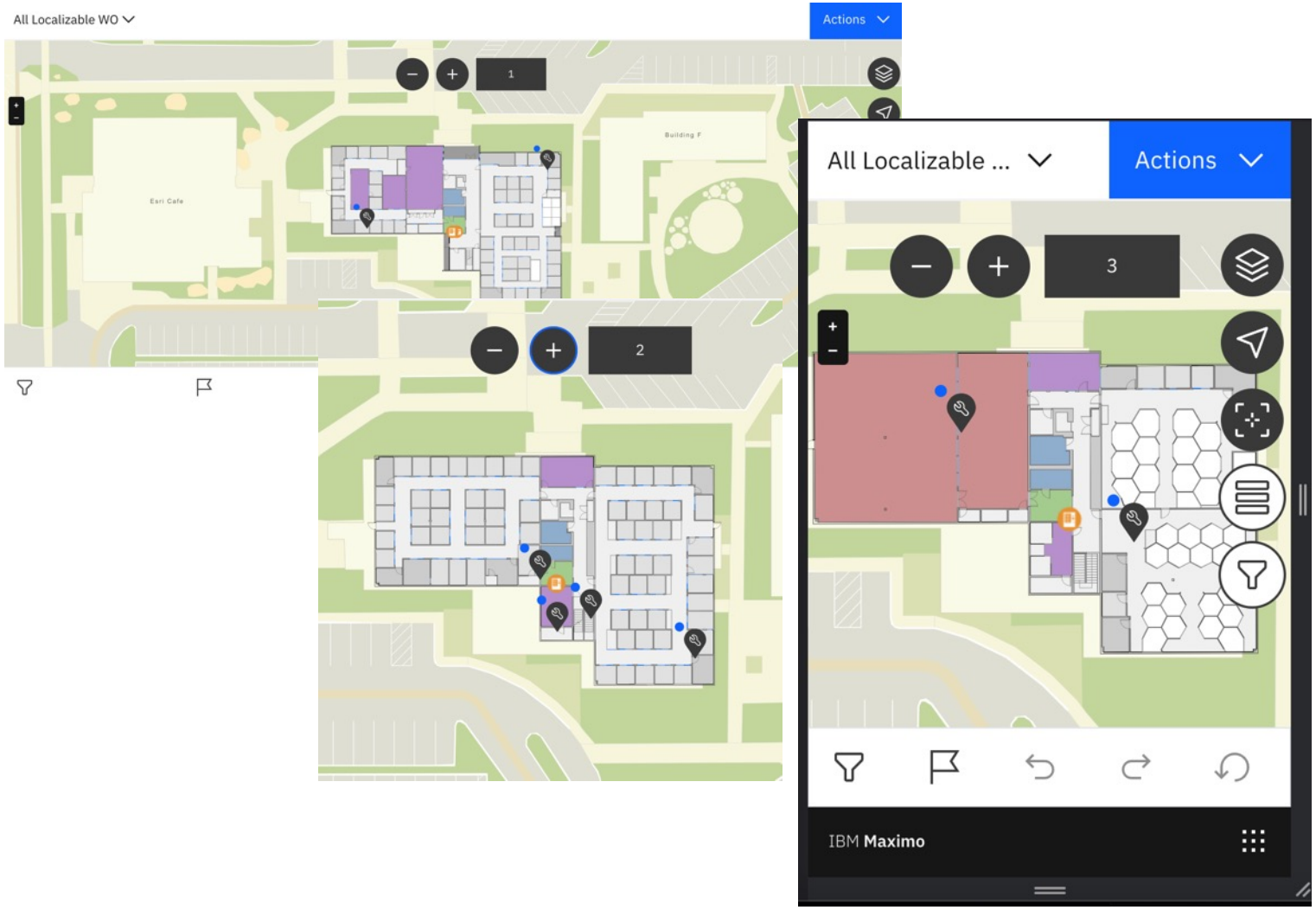

IBM's statements regarding its plans, directions, and intent are subject to change or withdrawal without notice at IBM's sole discretion. The information mentioned regarding potential future products is not a commitment, promise, or legal obligation to deliver any material, code or functionality. Information 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

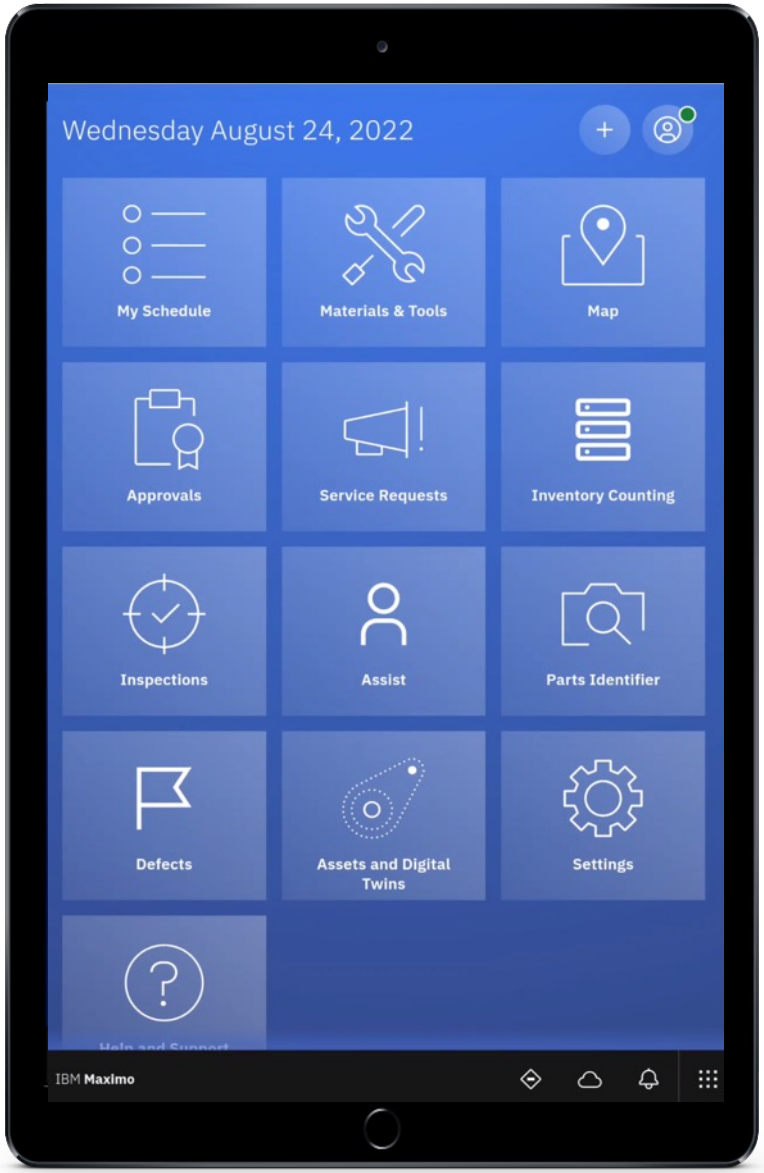
Trustworthiness: data quality
is higher, and real-time updates

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

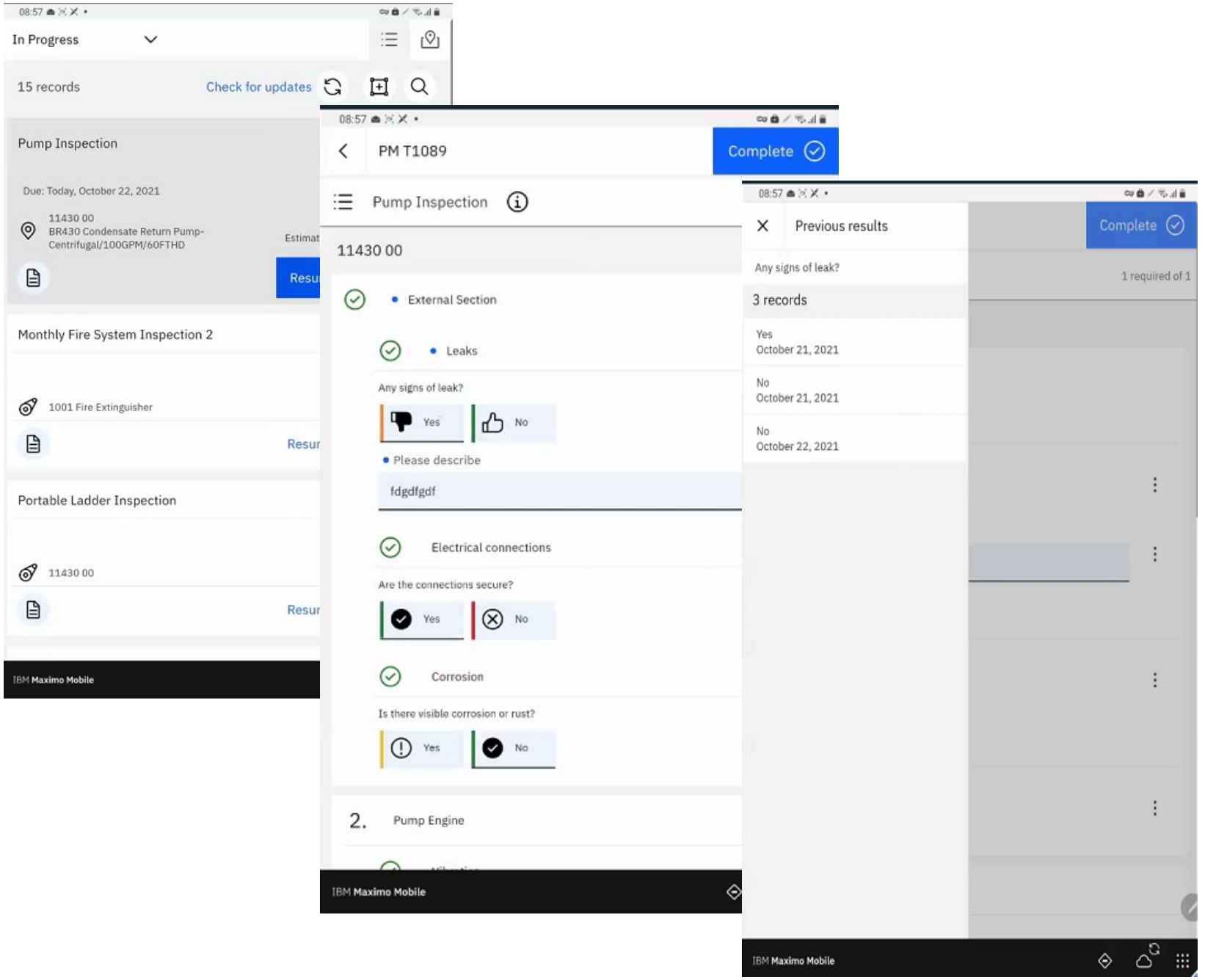
- Review work
- Approve work.

## • Service Request

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

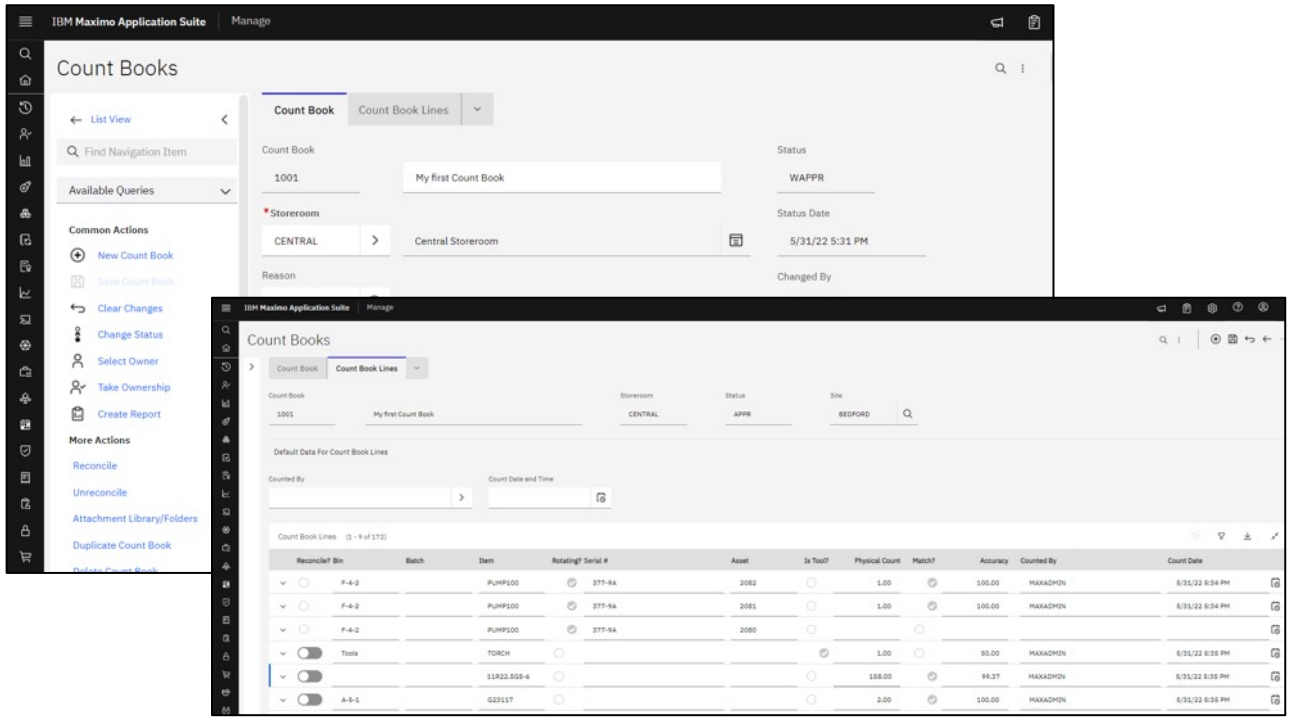
# Inspections

- 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



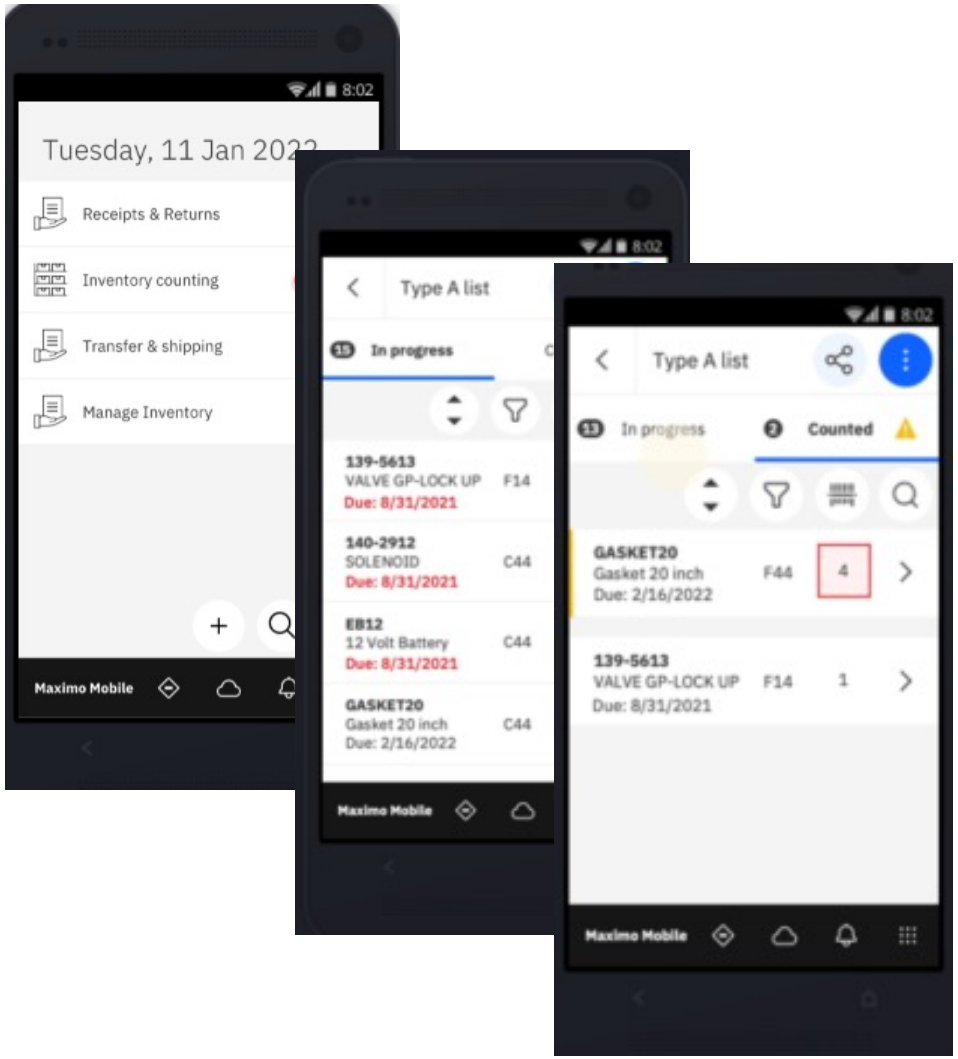
# Storeroom Clerk

## 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.



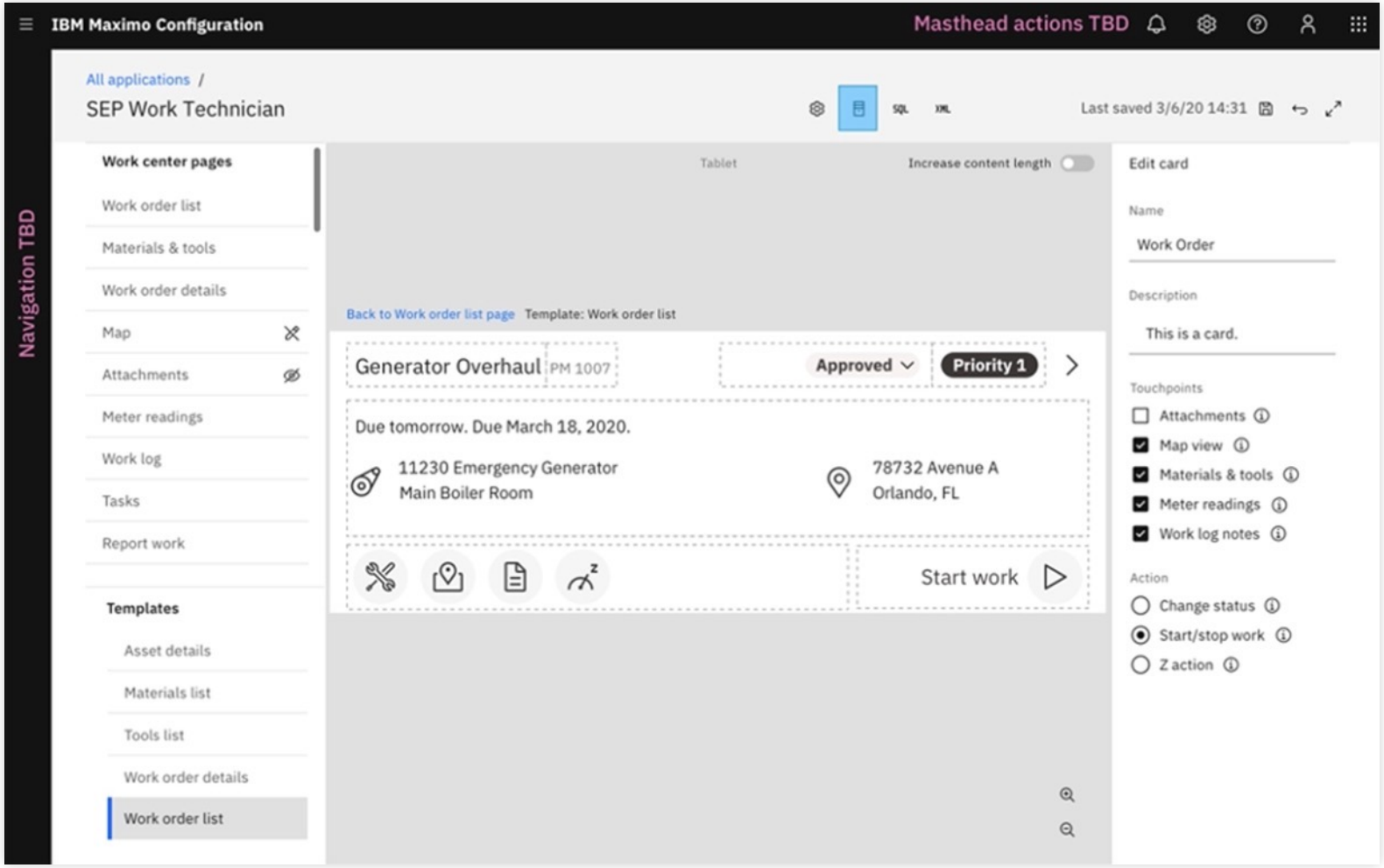

Accept materials being delivered (or returned) and inspect quantity and quality in one place efficiently

# 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

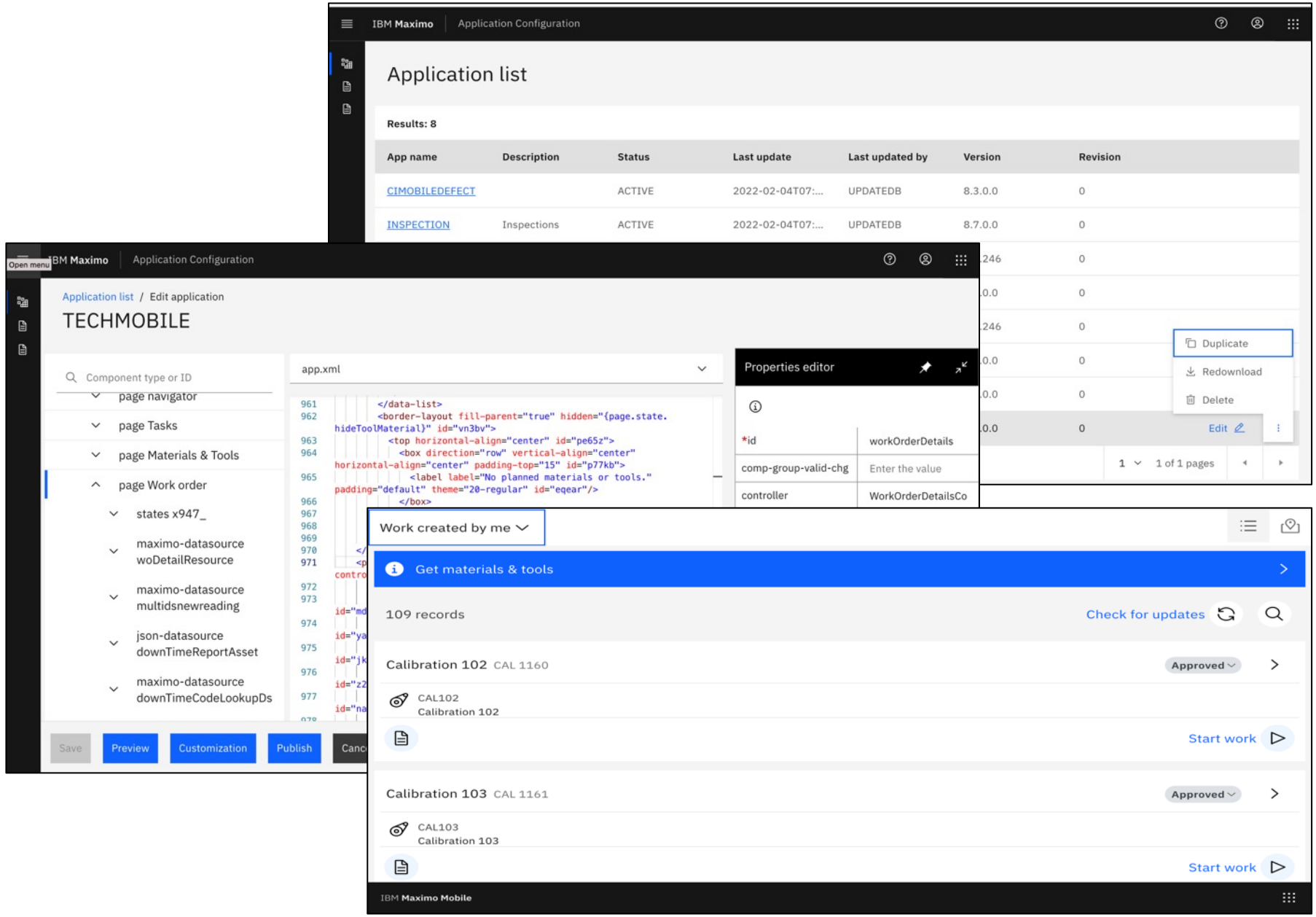
- Accelerate adoption
- Protect your investment
- Quicker time to value



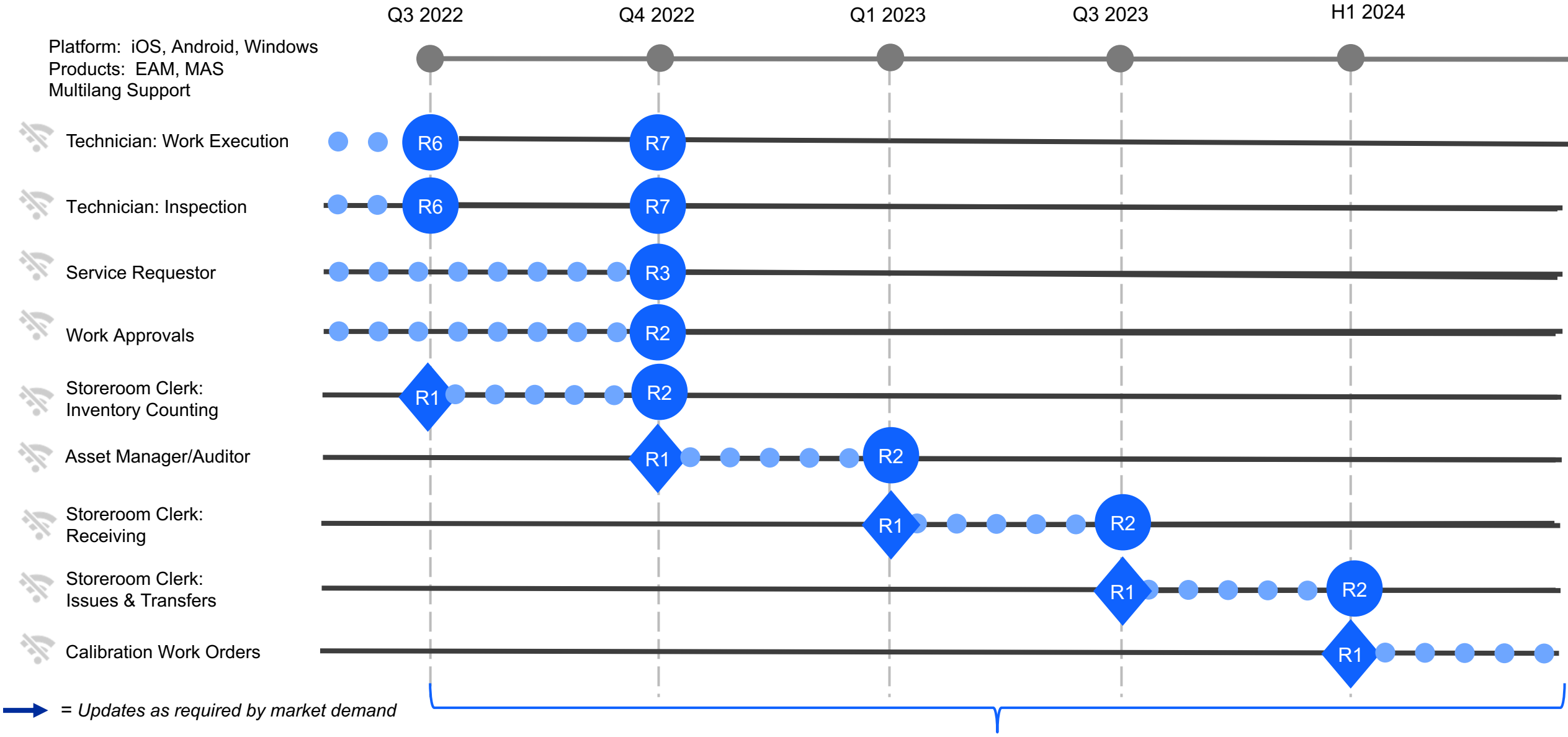
# Maximo application framework configuration

## Configuration Capabilities:

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



# Roadmap to Expand Maximo Mobile




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.

# 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)

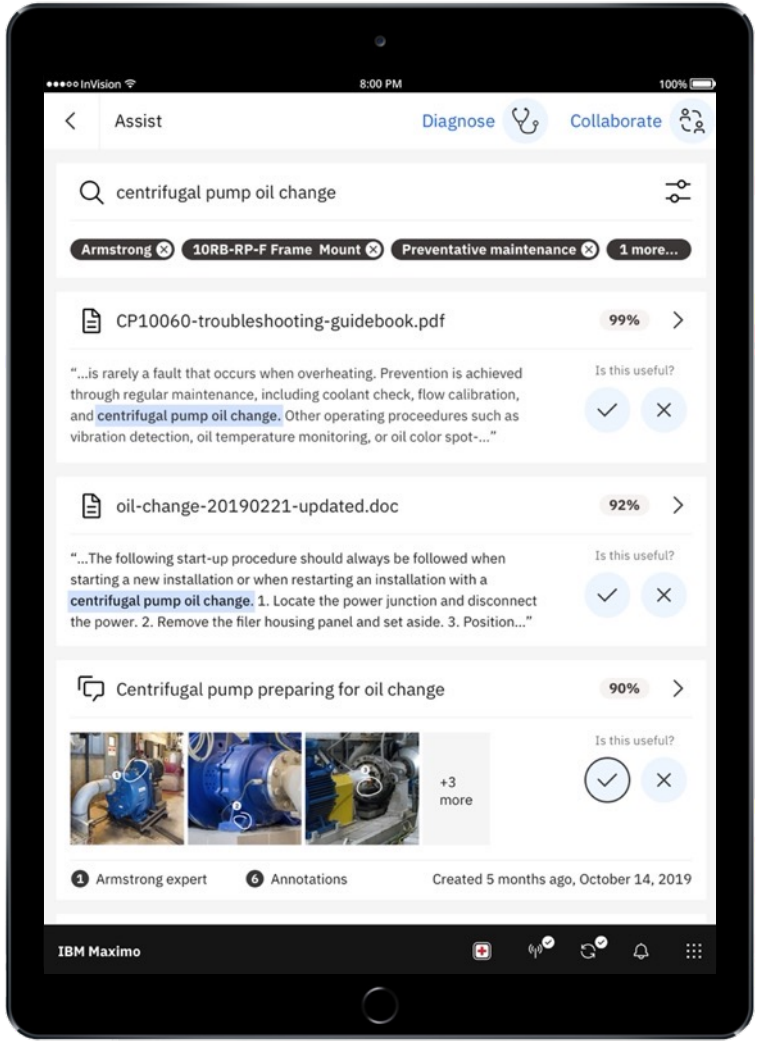
Manufacturer and owner manuals, engineering manuals

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

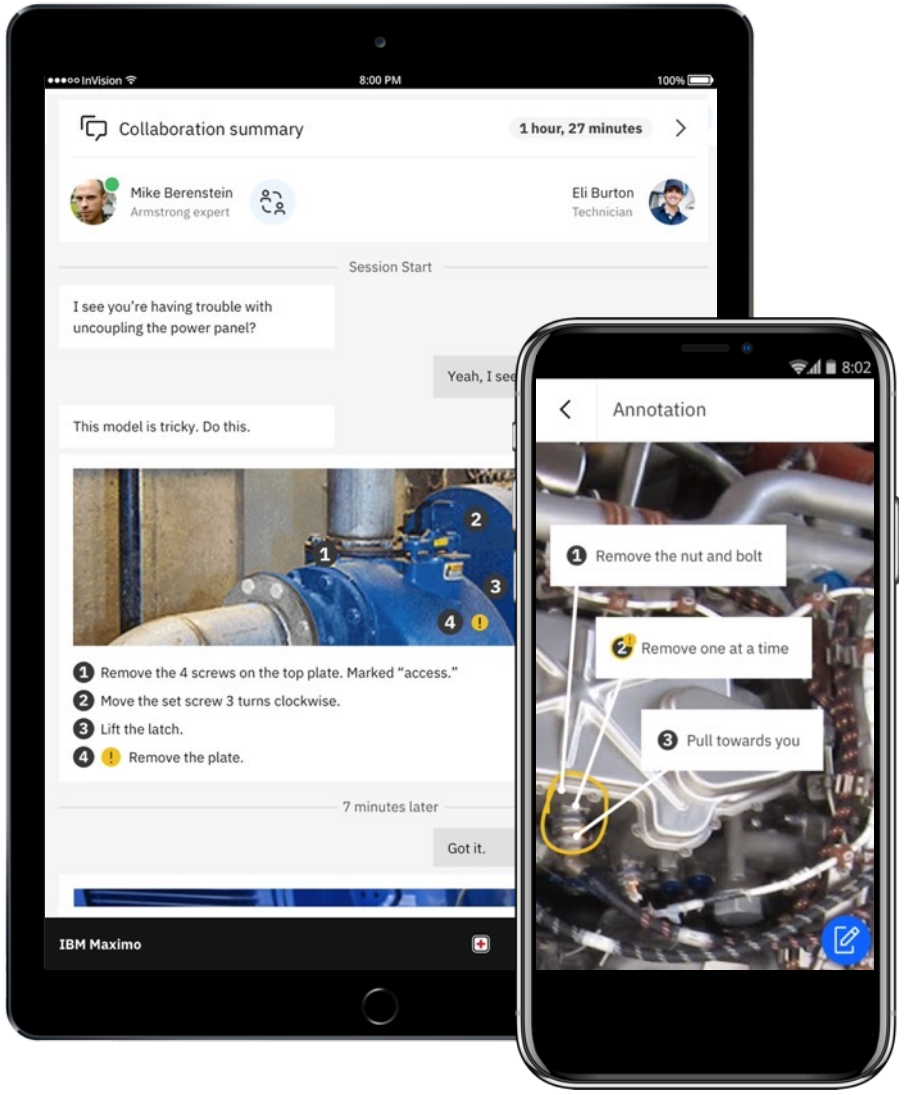
# Assist Remote Guidance

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

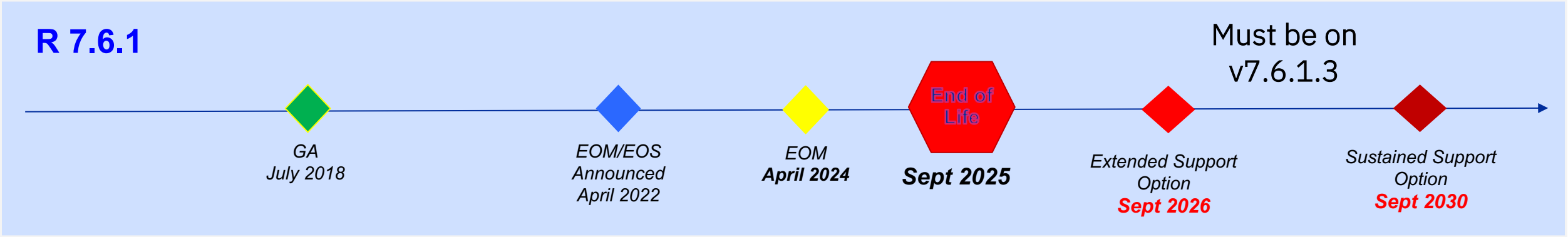
- Between IBM Solutions
  - MAS to TRIRIGA
  - TRIRIGA to Envizi
  - MAS to Envizi

- Between IBM and 3rd 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<br>IBM Announcement Letter #922-024 | 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.



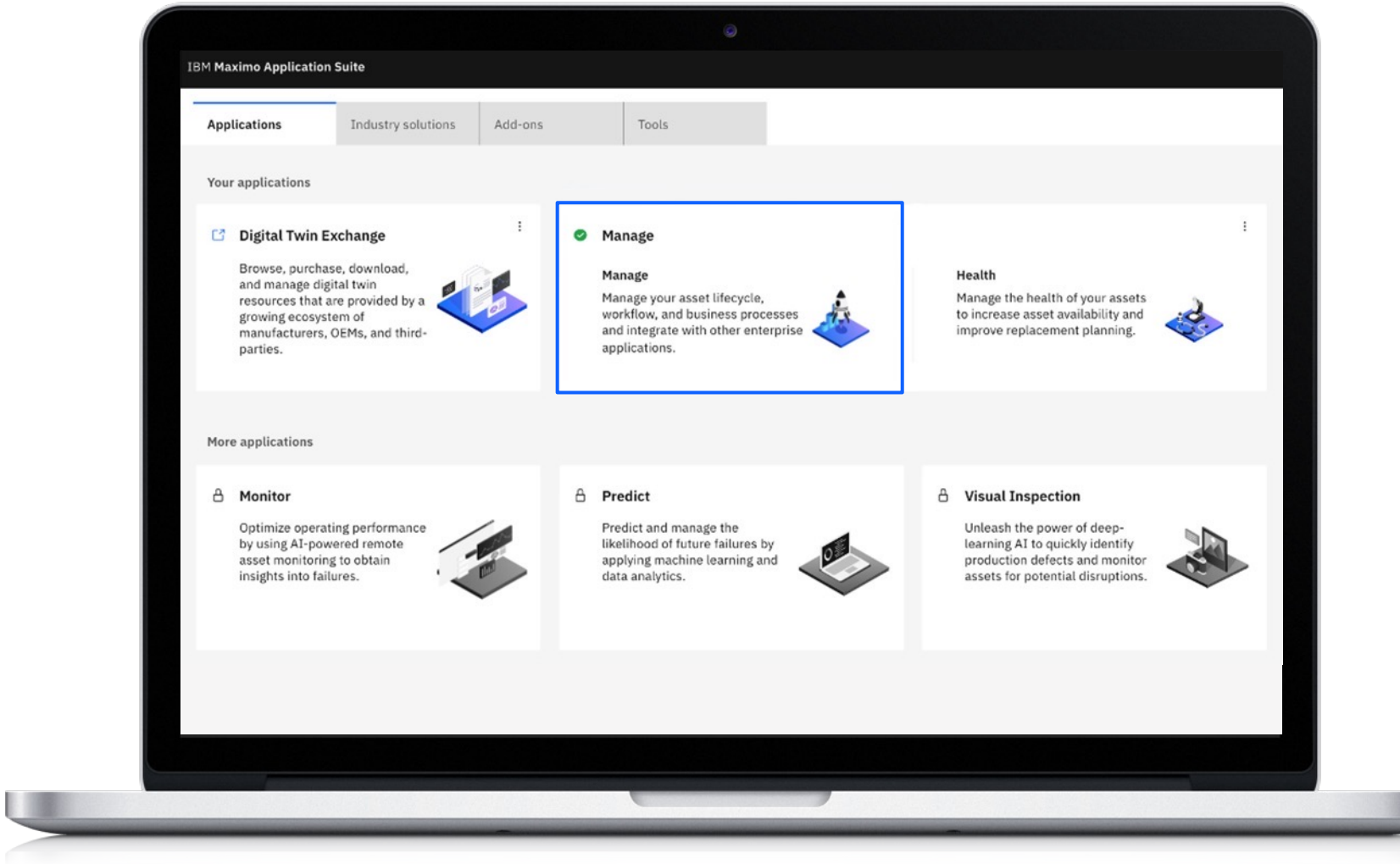
New IBM Support Offerings and EAM EOS Support page

# 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

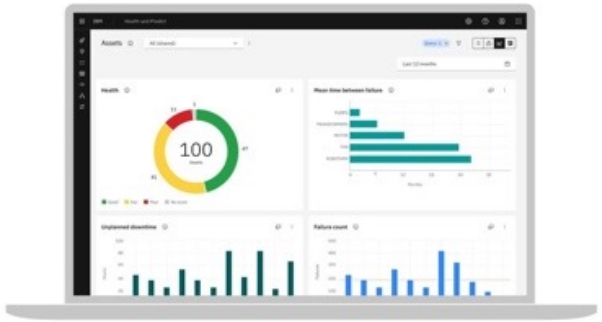
## Manage in the Suite

- 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



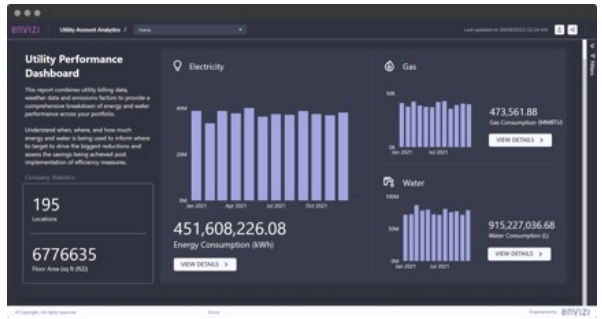

Upgrading from IBM Maximo Enterprise Asset Management to IBM Maximo Manage - IBM Documentation

# 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

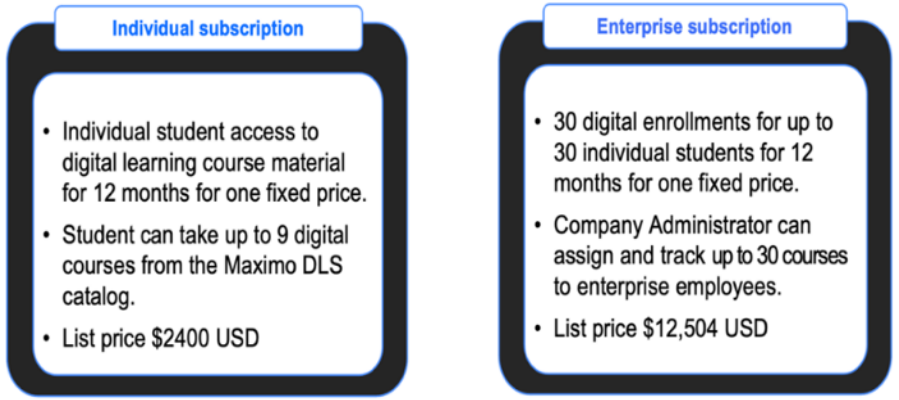
EIS: https://www.ibm.com/account/reg/us-en/signup?formid=urx-51911

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.

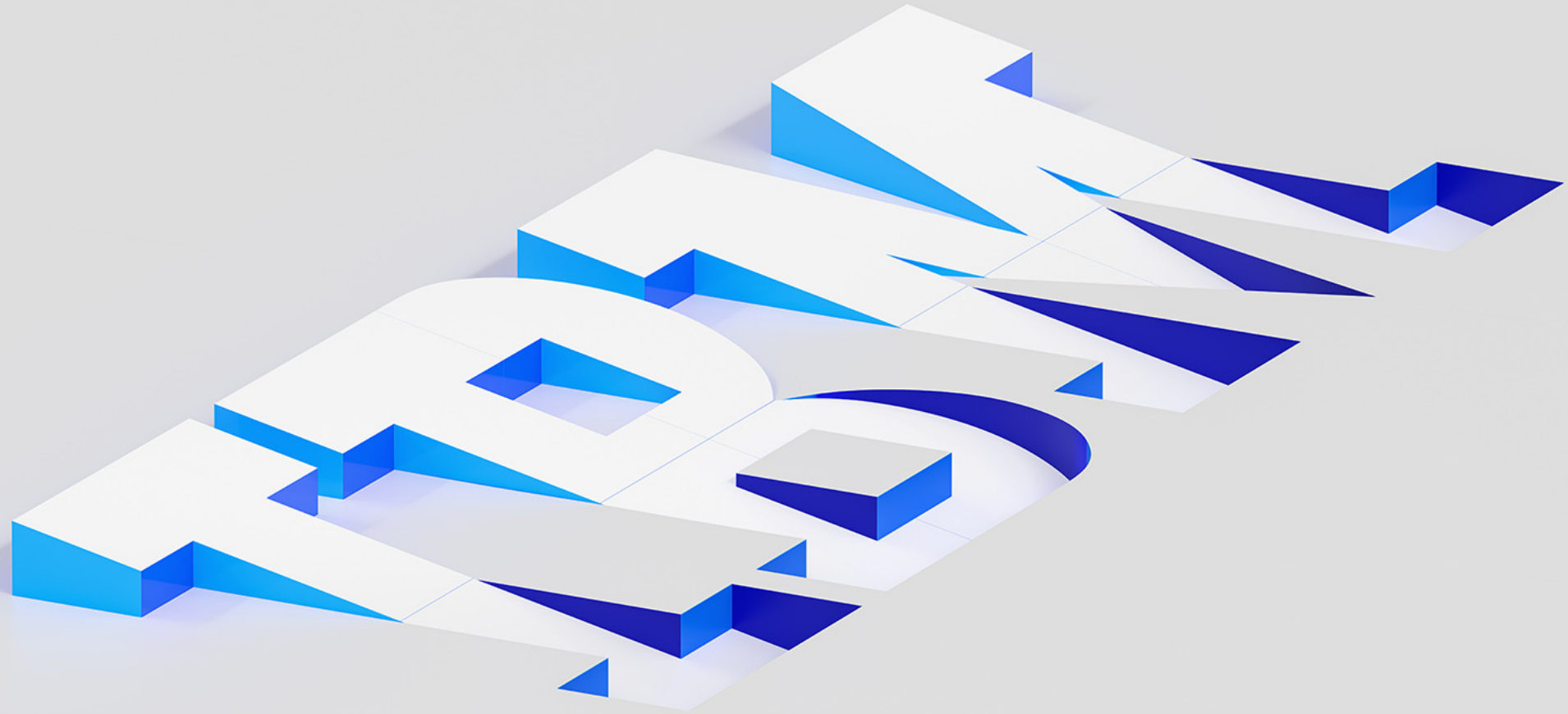
- **Maximize your investment**: Maximize your investment in IBM Maximo solutions. Bring your newly-acquired solutions to life. Pay one price for a 12-month learning subscription. Realize built-in savings compared to individual course purchases.
- **Build expertise, stay current**: Develop skills through 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:

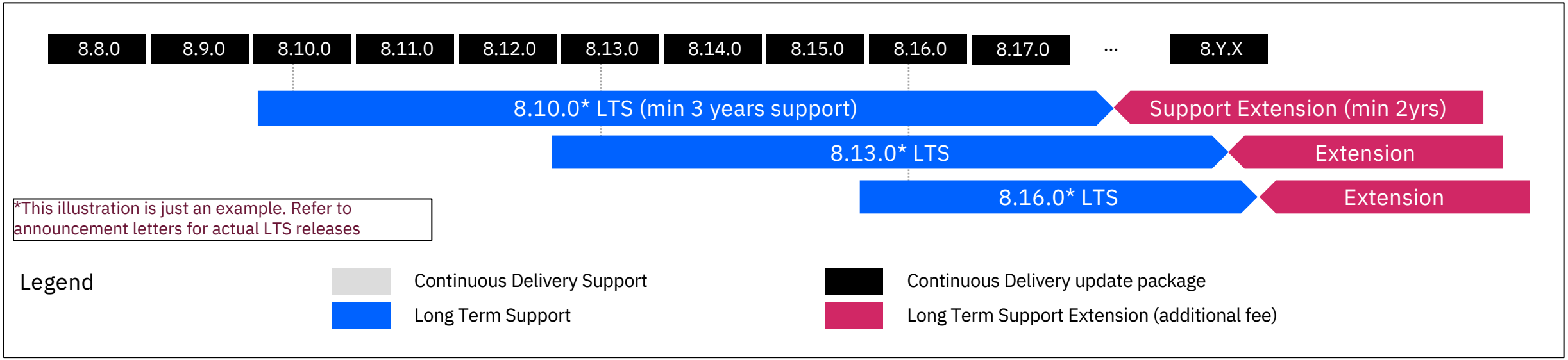
IBM Maximo Individual Learning Subscription
IBM Maximo Enterprise Learning Subscription

# 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

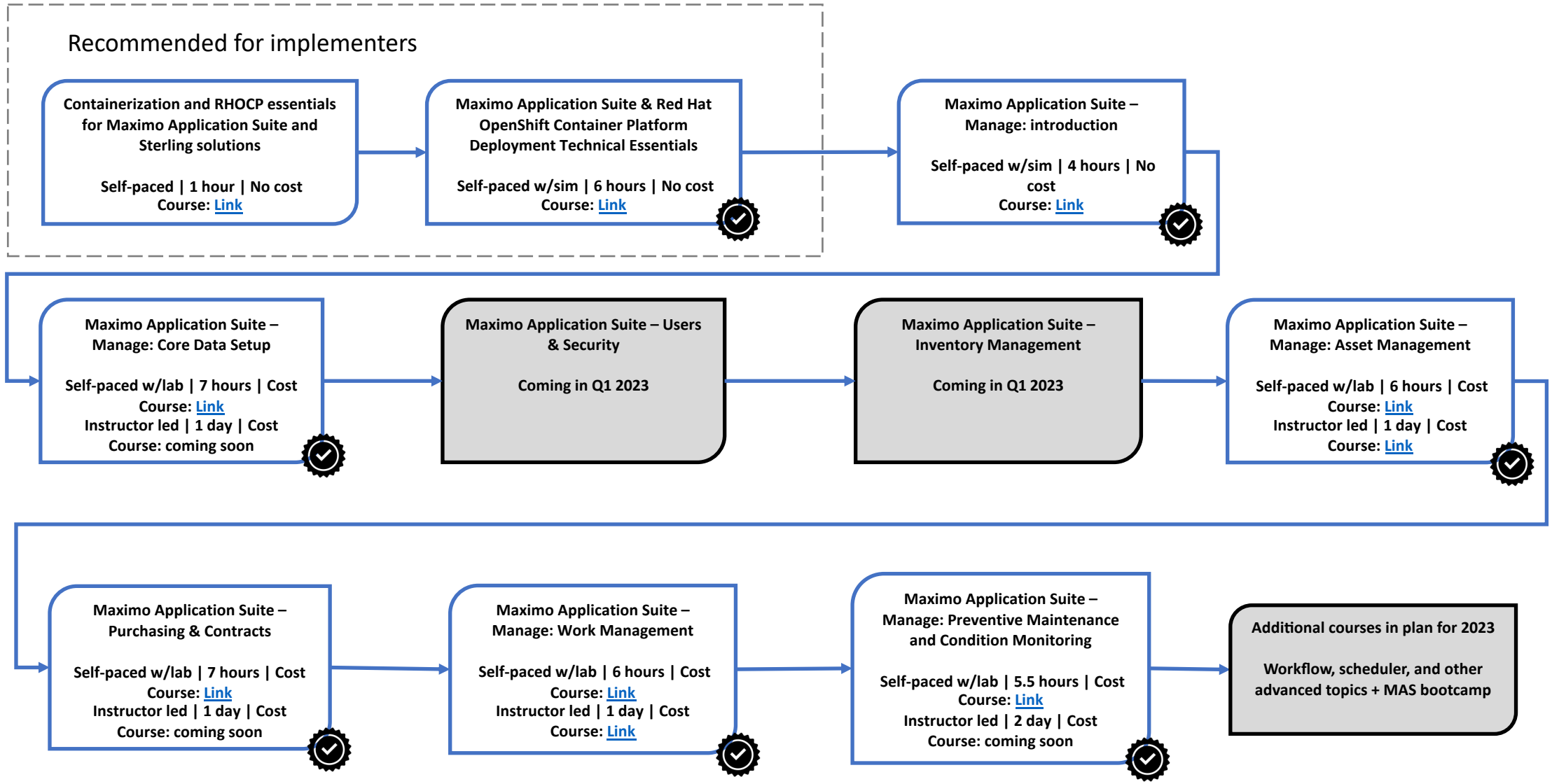
- Add and Edit tool - Phase 1 - Create Feature and Link
- Enhancement of Identify Tool / Preview Card
- Query Tool - Offline mode & Nearby - Around me + Maximo Objects
- Highlight Line Feature. / Enhancement - Data Panel
- Replace PlusSGeoJson for Geometry and auto-locate
- Indoors - Automatic Association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




Legend

Technical education

Technical education Coming soon

Badge

Last Updated: January 25, 2023

# IBM Maximo v7.6 / Maximo Application Suite – Manage v8.x

## 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**

Legend

Technical Certification

Certification

Last Updated: January 25, 2023

# AI Apps on OpenShift– Delivering Expanded Value

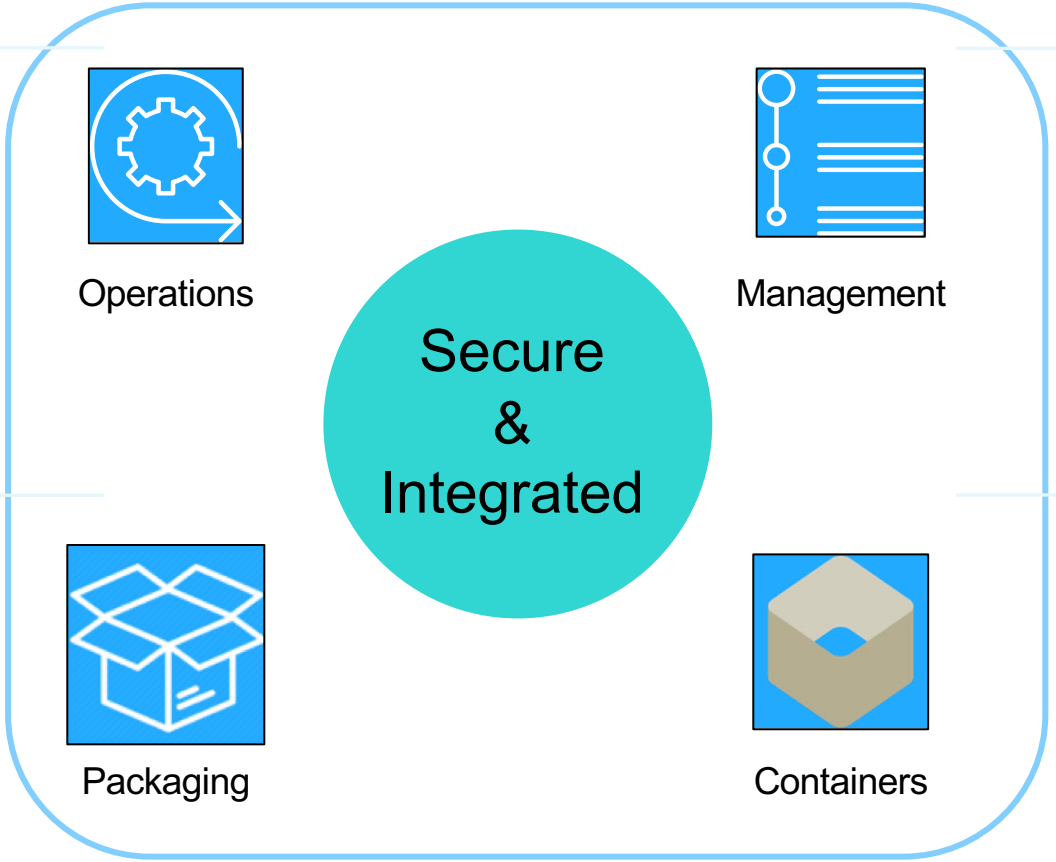
**Scale your operations with optimized resources**

38% percent lower infrastructure

35% less IT staff time per application

**Packaged with latest and greatest technology stack**

80% reduction in installation effort




**Manage Deployment Lifecyle through single pane of glass**

60% increase in IT administrator

**Production ready containers built with highest industry standards**

80% faster time to market

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*

Mentimeter

# Georgia MUG 2023 Attendee Survey

1

Mentimeter

# Instructions

47

# What topics are you most interested in discussing?

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

49 Answers

Seeing other Maximo options and uses

The orange juices were expired on 6/7/23

Good presentations.

Customer Use Cases

Everyone is super friendly and the get together the night before was a great icebreaker

Project use cases

Like hearing other customers use cases and different ways they utilize Maximo

Seeing where Maximo is used

Peer interaction and networking

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

49 Answers

- More Maximo specific demos like Mobile, MVI, MAS8
- Great presentations
- Variety of topics within Maximo, user presentations, business impact of Maximo use
- Enjoyed Interaction with other Maximo users.
- More Cowbell!
- Learning how different companies use Maximo.
- More power outlets
- More training opportunities vs just seeing what others are doing.
- Success stories

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

49 Answers

Different industries

Variety of Subject Matter

Enjoyed Lessons learned and hearing about people's journeysCollaborationsWillingness to shareDemonstrations

Liked hearing about other companies experiences with implementations

Inventory struggles with Great Dane. Conference location (training building) not clear on invite.

Innovative add-on solutions- IoT

Asset management for Maximo

Open forum for discussion on best practices

Good networking! Sam could sing first. Show the benefits on your stories

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

49 Answers

Introduce the room attendees

Meeting other Maximo Users!

I enjoyed meeting fellow peers in the Maximo space that are local(ish) to Atlanta. It was great hearing/seeing what others are up to from both a vendor and customer perspective.

Networking opportunities were greatIntroductions of users at least by companies representied would have been great

Customizations vs configuration.

Struggles and successes

Real World Industry Solutions Offer Training and/or Testing Options

The high tech new screens

Learning about the broad uses Maximo has and how it is being used at other companies.

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

49 Answers

Customer Use Cases. It'd be great to have a session about customizations (auto scripts, escalations, etc)

Maximo Mobile Demo

Presentations, Maximo hints and guidance, and the coffee.

Sharing tips and Implementation challenges

Other industries have similar issues to us.

Variety of topics and presenters.

Local group of Maximo users where collaboration and networking can occur

Enjoyed the networking and the presentation of different integrations.

Overtime tracking and Projetech overview of capabilities in Maximo were quite interesting.

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

49 Answers

User community sharing both positive and negative experiences, as well as custom apps and why they were developed.

Learning about how other company use Maximo to meet their business needs.

Enjoyed danishes. Bigger font on presentations

Anybody hiring?

# That's a wrap!

Thank you for attending & being present here today.