

Overtime Offer Tracking

In Maximo

GAMUG June 2023

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People

105,000
Employees



54,000
Scientists and
Engineers



375+
Facilities
Worldwide



Operating in over
54 Countries

With **7,500+**
Employees



Lockheed Martin Business Areas



Aeronautics

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



Missiles and Fire Control

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



Rotary and Mission Systems

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



Space

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

Lockheed Martin Aeronautics

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



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

Lockheed Martin Aeronautics



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

Lockheed Martin Aero Maximo

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

Lockheed Martin Aero Maximo

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

Example Spreadsheet



- 5
- 1
- 4
- 7
- 2
- 6
- 3

11/16/2009

T.O.Shield
Burns, M.

			9/26/2020 0:00
A/C MACHANIC	DAY	7/25/2020 0:00	
IWT OPERATOR		#REF!	0
GROUNDS DRIVER	GRAVAYARC	#REF!	1383.5
CARPENTER	SWING	#REF!	1388
GROUNDS OPERATOR		#REF!	1388
		#REF!	1389
PAINTER		#REF!	1389.5
4/4/2019		#REF!	1390.5
		#REF!	1405
		#REF!	
		#REF!	
PIPE WELDER		#REF!	
PLUMBER/WELDER	1	#REF!	
		#REF!	

PRINTED

12/3 9:14

Recorded Macros

```

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

```

Call In List

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

Lockheed Martin Aero Maximo

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

Lockheed Martin Aero Maximo

- New Tables:

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

Live Demo

Lockheed Martin Aero Maximo

- New Custom Application:

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

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

The interface includes a search bar at the top, a navigation sidebar on the left, and a toolbar with various icons for search, save, and navigation. The table has a 'Filter' button and a pagination indicator showing '1 - 30 of 30'.

Lockheed Martin Aero Maximo

- Week view of offered overtime:

Week Ending: Site: MAF-MARIETTA

Supervisor: Team: Automated Machine Mechanics

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

Call List

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

Filter > 1 - 13 of 13

Person	Name	Phone	DNC?	Rank	PYTD Hours	Fri, 2/17	Code	Sat, 2/18	Code	Sun, 2/19	Code	Mon, 2/20	Code	Tue, 2/21	Code	Wed, 2/22	Code	Thu, 2/23	Code	YTD Hours
10000	John Doe	123456789	<input checked="" type="checkbox"/>		461.13	12.00	R	12.00	R	16.00	R	0.00		0.00		0.00		0.00		501.13
10001	Jane Smith	987654321	<input checked="" type="checkbox"/>		459.22	12.00	W	14.25	R	16.00	R	0.00		0.00		0.00		0.00		501.47
10002	Robert Brown	112233445	<input checked="" type="checkbox"/>		459.28	12.00	W	14.25	W	16.00	W	0.00		0.00		0.00		0.00		501.53
10003	Michael Green	556677889	<input type="checkbox"/>		463.50	12.00	R	12.00	R	16.00	R	0.00		0.00		0.00		0.00		503.50
10004	Thomas White	990011223	<input type="checkbox"/>		463.59	12.00	R	12.00	R	16.00	R	0.00		0.00		0.00		0.00		503.59
10005	David Black	334455667	<input checked="" type="checkbox"/>		459.21	14.25	W	14.25	R	16.00	R	0.00		0.00		0.00		0.00		503.71
10006	Matthew Gray	778899001	<input checked="" type="checkbox"/>		463.89	12.00	A	12.00	A	16.00	A	0.00		0.00		0.00		0.00		503.89
10007	Christopher Blue	223344556	<input checked="" type="checkbox"/>		464.09	12.00	W	12.00	W	16.00	W	0.00		0.00		0.00		0.00		504.09
10008	Timothy Green	667788990	<input type="checkbox"/>		458.10	14.25	W	14.25	R	19.00	R	0.00		0.00		0.00		0.00		505.60
10009	Kevin Brown	001122334	<input type="checkbox"/>		458.89	14.25	R	14.25	R	19.00	R	0.00		0.00		0.00		0.00		506.39
10010	Andrew White	445566778	<input checked="" type="checkbox"/>		458.98	14.25	R	14.25	R	19.00	R	0.00		0.00		0.00		0.00		506.48
10011	Joseph Black	889900112	<input checked="" type="checkbox"/>		459.08	14.25	R	14.25	R	19.00	R	0.00		0.00		0.00		0.00		506.58
10012	William Green	223344556	<input checked="" type="checkbox"/>		459.08	14.25	W	14.25	W	19.00	W	0.00		0.00		0.00		0.00		506.58

Lockheed Martin Aero Maximo

- Call In List via Report

Reporting

Page 1 of 1

Tivoli

Automated Machine Mechanics

Supervisor Group: [Redacted]

Week Ending: [Redacted]

Last Update: [Redacted]

Updated By: [Redacted]

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

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

Observations

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

Next Steps

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

Questions?



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

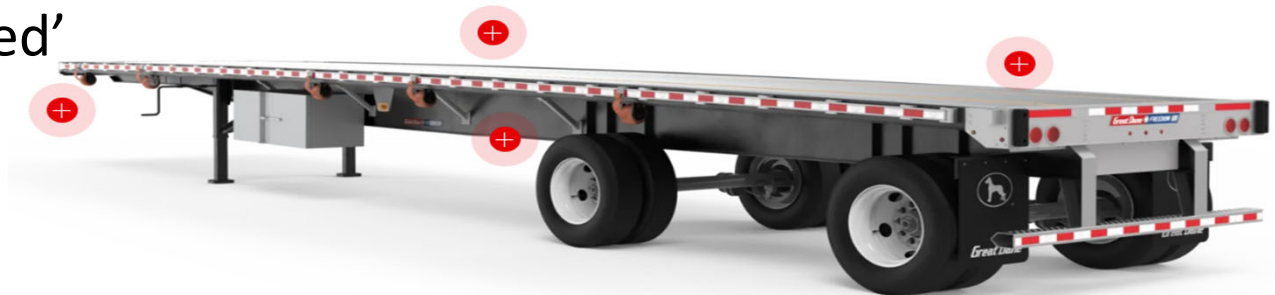
- Refrigerated



- Dry Vans



- Open Deck / 'Flatbed'



Implementation Milestones

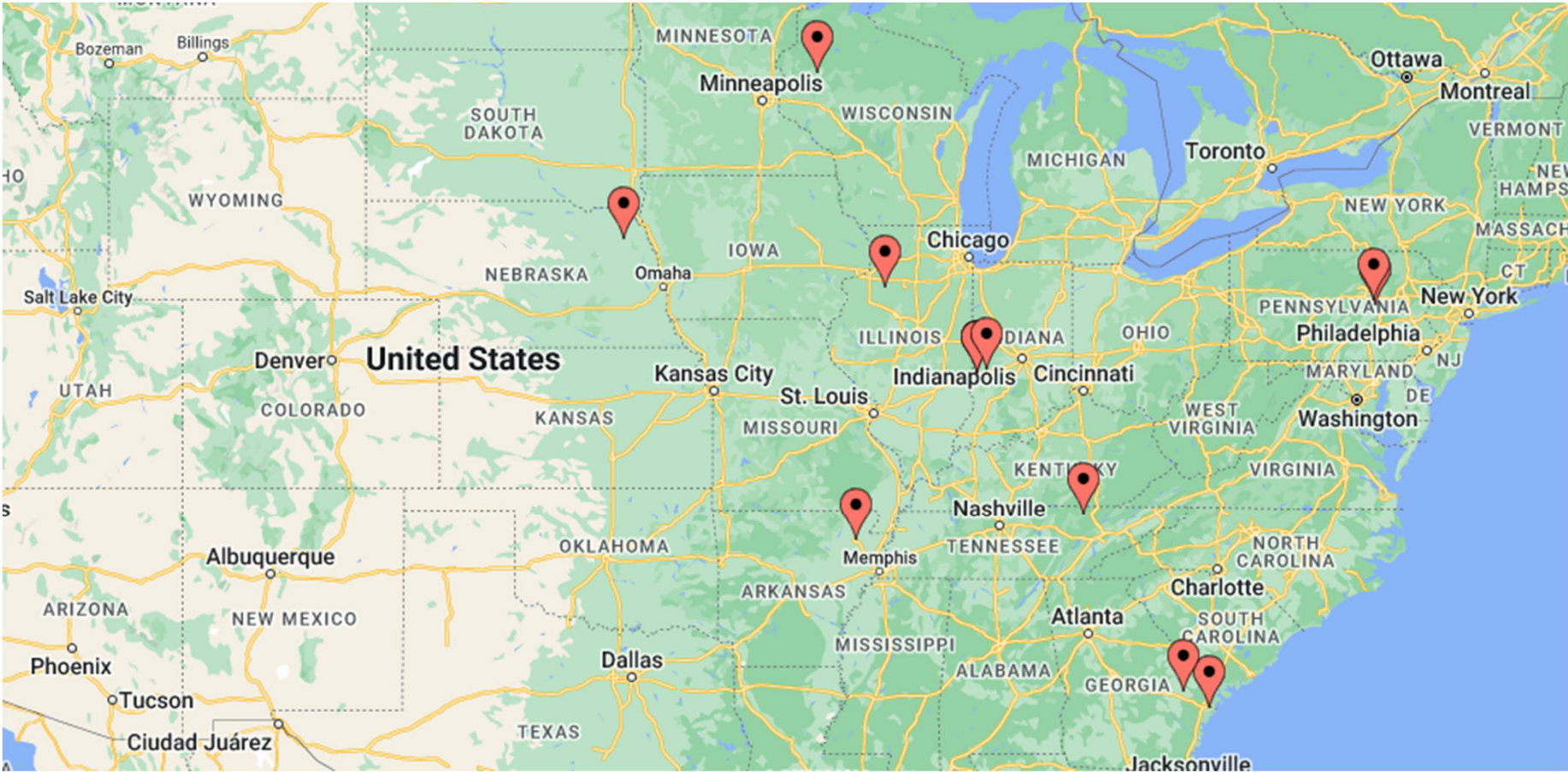
Work Management

- 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



Great Dane

maximo

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

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YEARS
Projetechno Inc.
#SINCE1990



About Projotech

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

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



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

- Configuration &
Tailoring

- ~~Customization~~

Organization Options – maybe too many

Work Order Options ^

Work Type

Edit Rules

Other Organization Options

Site Options

Everyplace Work Query Opti...

Inventory Options ^

Item Options

Inventory Defaults

Reorder

Inventory Costs

Transfer Options

Count Books Options

Crew Assignment Options

Asset Options

Drilldown Options

PM Options

Safety Plan Options

Purchasing Options ^

PO Options

Contract Options

Tax Options

PO Labor Options

Invoice Options

Labor Options

Service Desk Options

Global Ticket Solution Option

SLA Options

Ownership Assignment Options

Workflow Options

Autonumber Setup

System Level

Set Level

Organization Level

Site Level

System Settings

Delete Organization

Add to Bookmarks

Calibration Options

Work Order - Other Organiza.

Work Order - Edit Rules

Associate Time Zone

Maximo Edit Rules for consideration

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

The screenshot shows the 'Organizations' page in the IBM Maximo Application Suite. The 'Edit Rules' section is active, displaying a table of 'Work Order Edit Settings' (1 - 6 of 6). The table has columns for various settings: Status, GL Account?, Asset?, Location?, WP Labor?, WP Materials?, WP Service?, WP Tools?, Safety Tab?, and Dynamic Job Plan?. The 'INPRG' rule is highlighted with a blue box, and a mouse cursor is pointing at the 'Asset?' toggle switch, which is currently turned off. The 'WAPPR' rule has several settings turned on, indicated by green checkmarks.

Status	GL Account?	Asset?	Location?	WP Labor?	WP Materials?	WP Service?	WP Tools?	Safety Tab?	Dynamic Job Plan?
APPR	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COMP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
INPRG	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WAPPR	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
WMATL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WSCH	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Domains – many delivered, but you can add as too

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

SYNONYM Domain

Domain: WOSTATUS

Domain Type: SYNONYM

Length:







SYNONYM Domain 1 - 10 of 11

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

Select Records

Roles & Communication Templates

Communication Templates

Find Template      

List View | Communication Template | Recipients | Attachment Folders

Template: PONOTIFICA1 | Purchase Order Notification | Status: ACTIVE

Role(s) for Communication Template PONOTIFICATION | Filter > | 1 - 2 of 2

Role: POVNDCTCT | Purchase Order Vendor Contacts

*Type: A set of data rel. v

Object: PO

*Value: :PO_VENDOR.CONTACT.email

Parameter: :PO_VENDOR.CONTACT.email

E-mail?

Create Communication

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

Template: PONOTIFICA1 >>


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

cc: George.Defrost@CMC.com, Gerald.Denning@CMC.com

bcc:

Subject: Purchase Order Report 1114 / Changeover Management Coi

Font: | Size: | Format: None



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

If there are any questions or concerns, please contact My Company's Procurement Team at buyer@mycompany.comn.

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

Regards,

Add Calculations to Reporting Library

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

The screenshot displays the IBM Maximo Application Suite interface. On the left, the 'Report Administration' sidebar is visible, with the 'Define Ad Hoc Reporting Library' option highlighted. The main content area shows the 'Ad Hoc Report Expression Library' configuration page. At the top, there is a header 'Ad Hoc Report Expression Library' and a sub-header 'Define the expression keywords that users can use when they create SQL expressions in ad hoc reports.' Below this, a table lists the keywords. The 'DayDateDiff' keyword is selected, and its details are shown in a form below the table.

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

Details

Expression Id
DayDateDiff

Description
DayDateDiff

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

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

Query Based Reporting – Runtime Parameters

How is this done?

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

QBR Report Administration Page

IBM Maximo Application Suite | Manage Take a tour

Report Administration

Report Administration

Parameters (1 - 3 of 3)

Parameter Name	Attribute Name	Sequence	Display Name	Multi-Lookup Enabled?	Operator	Required?
Site ID	siteid		Site ID('s)	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Earliest Actual Finish Date	actfinish	1	Earliest Actual Finish Date	<input type="checkbox"/>	>=	<input checked="" type="checkbox"/>
Latest Actual Finish Date	actfinish	2	Latest Actual Finish Date	<input type="checkbox"/>	<=	<input checked="" type="checkbox"/>

Details

Parameter Name: Site ID

* Attribute Name:

Lookup Name:

Display Name:

Display Sequence:

Required?:

Multi-Lookup Enabled?:

Default Value:

Operator:

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

Integration Module: Object Structures

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

Object Structures

> Object Structure



Source Objects for REP_INVENTOR_ITEM (1 - 4 of 4)



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

Substitution Variables for Q's and QBR's

related to the current user's default insert site:

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

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

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

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

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

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

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

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

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

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

Drilling down into your costs

Reporting IBM.

Page 1 of 1

Cost by System

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

Location	Description	Children	Description	Additional Children?	Total Cost
NEEDHAM	Needham Site			Y	1098.10
		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

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

Reporting IBM.

Page 1 of 1

Cost by System

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

Location	Description	Children	Description	Additional Children?	Total Cost
BOILER	Boiler Room			Y	562.11
		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

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

Backlog of Work On BOILER

More Search Fields| Current Query:

Work Order: Problem Code: Crew Work Group:

Description: Failure Class: Work Type:

Parent WO: Service Group: Status:

Location: Service: Class:

Search Location Hierarchy: Vendor: Site:

Asset: Originating Record: History?:

Configuration Item: Originating Record Class: Priority:

PM: Risk Assessment: Is Task?:

Classification:

Repair Facility:

Repair Facility Site:

-----Actual Usage Search Criteria Area -----

Item:

Description:

Labor:

Work Order Tracking MAXADMIN

Home | Menu | Query | Find Work Ord | [Icons]

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

Advanced Search | Save Query | Bookmarks

Work Orders Filter > | 1 - 10 of 10

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

Select Records



Backlog of Work on BOILER Hierarchy

More Search Fields | Current Query:

Work Order: Problem Code: Crew Work Group:

Description: Failure Class: Work Type:

Parent WO: Service Group: Status:

Location: Service: Class:

Search Location Hierarchy: **BOILER** Vendor: Site:

Asset:

Configuration Item:

PM:

Classification:

Repair Facility:

Repair Facility Site:

Work Order Tracking MAXADMIN

Query Find Work Ord

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

Advanced Search Save Query Bookmarks

Work Orders Filter 1 - 20 of 144

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

Honorable Mentions

Cron Tasks

- KPI Cron Task – 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





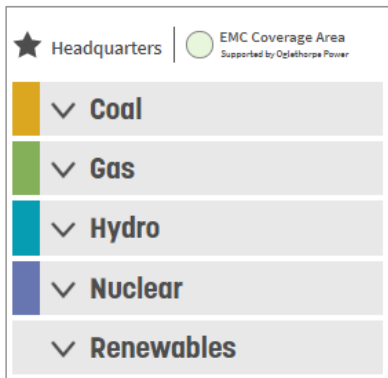
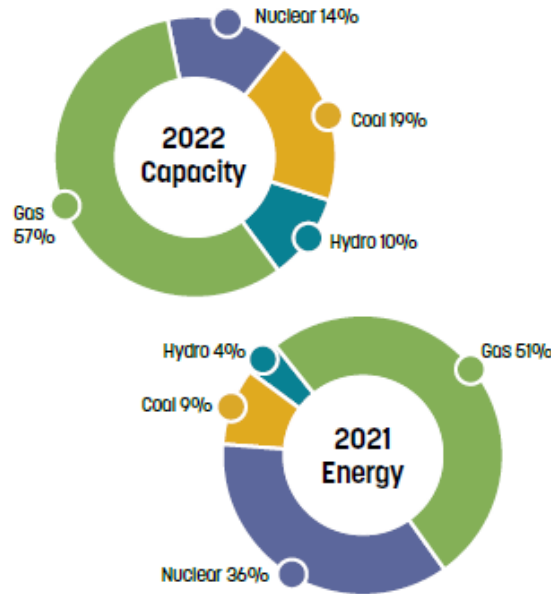
Oglethorpe Power Corporation E-Sourcing Initiative





Oglethorpe Power Corporation

GENERATING FACILITIES



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



Oglethorpe Power Corporation

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



OPC Headquarters



Thomas A. Smith Energy Facility



Bobby C Smith Energy Facility



Chattahoochee Energy Facility



Rocky Mountain Hydroelectric Plant



Doyle Energy Facility



Hawk Road Energy Facility



Hartwell Energy Facility



Baconton Power



Sewell Creek Energy Facility



Smarr Energy Facility



Talbot Energy Facility



Washington County Power



Business Application Usage On Maximo 7.6.1.2

* Workflow-Enabled

**Add-On Product

*** In Progress

MODULE	APPLICATION
Administration	Calendars, Resources, Classifications, 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

EzReq


Max Admin

Catalog Item: 1011

Manufacturer / Model : RIDGID / R9600

×

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



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

Sourcing:

Purchase

Home Depot

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

Punchout

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

Requested Delivery Date *
04 / 04 / 2023

Charging Key

Requester Remarks

Quantity
- 1 + / EA

Line Total: \$179.00

[Update Sourcing](#)

[Update](#)

Why P2Insight's Order Hub?

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

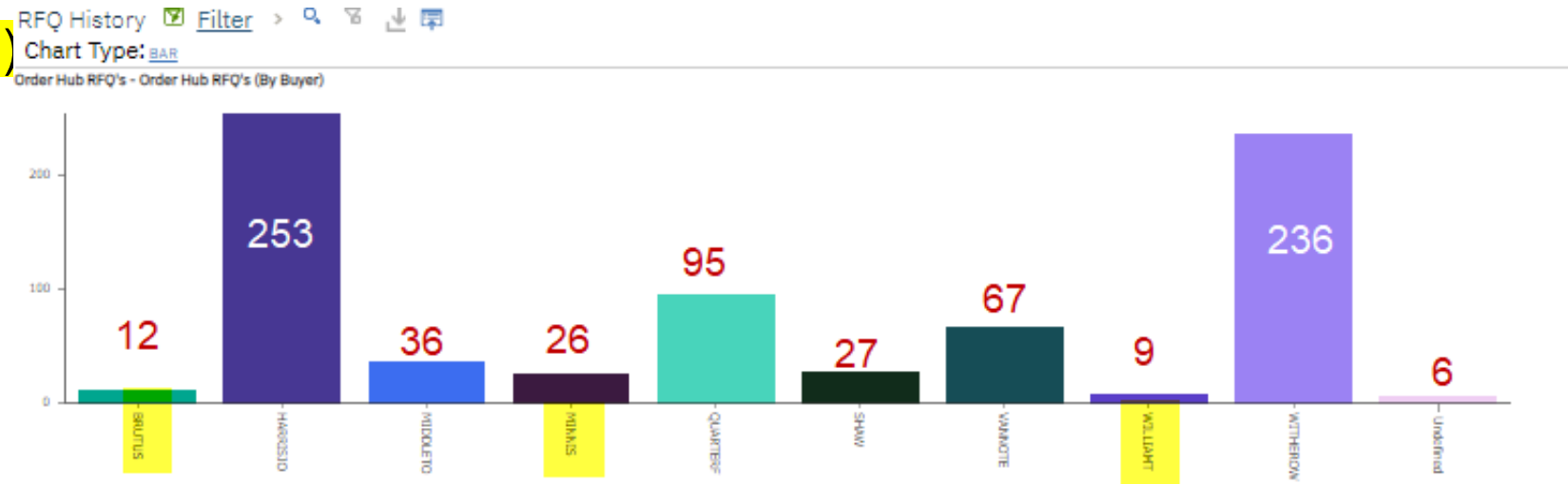


Implementation Schedule

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

Current Status (as of June 1, 2023)

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





RFQ Inventory Items & Direct Issue Materials



Sample RFQ: Inventory Items/Materials

Purchase Requisitions

Find PR

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

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

WF Last Memo Details:

Site: CHATT

Status: APPR

Attachments

Notes:

Details Dates Costs Bid/Quote

Priority: 1

Status Date: 1/27/22 3:46 PM

Pretax Total: 700.0000

Requested By: MAXCH

Requested Date: 12/17/21 5:40 AM

Total Tax: 0.0000

Requested For:

Required Date: 12/17/21 5:40 AM

Total Cost: 700.0000

Supervisor:

Currency: USD

Contract Reference:

Total Cost before RFQ:

Contract Type:

Bid and/or Quote:

Bid/Quote Exception or Explanation:

The Create RFQ button becomes available when the PR changes status to WRFQ (Waiting on RFQ)

The Create PO(s) button will be available ONLY if the PR is not in Workflow and An RFQ was not created OR The RFQ was created and is either fully processed (Finalized) or cancelled

Create RFQ

Create PO(s)

Status is approved



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

The screenshot shows a PR record for 'MSA Ultima X5000 Gas Monitor with visible and audible alarm'. A 'Manual Input' dialog box is open, listing several options: 'Stop Workflow to Create PO', 'Change Status to WRFQ and Hold' (selected with a red arrow), 'Return PR to Originator', 'Return PR to Senior VP Plant Operations', 'Send to CIP-013 Review Team', and 'Cancel PR'. The dialog also includes a 'Memo' field and 'OK' and 'Cancel' buttons.

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

The screenshot shows the same PR record. The 'Manual Input' dialog box is open, listing options: 'Route PR for Approvals', 'Close PR', and 'Change Status to WRFQ and Hold (PR Must be in APPR or WRFQ Status)' (selected with a red arrow). The dialog also includes a 'Memo' field and 'OK' and 'Cancel' buttons.



Sample RFQ: Inventory Items/Materials

Create the RFQ using Create RFQ button

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

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

Notes:

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

Site: CHATT
Status: WRFQ
Attachments

Status is Waiting RFQ

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

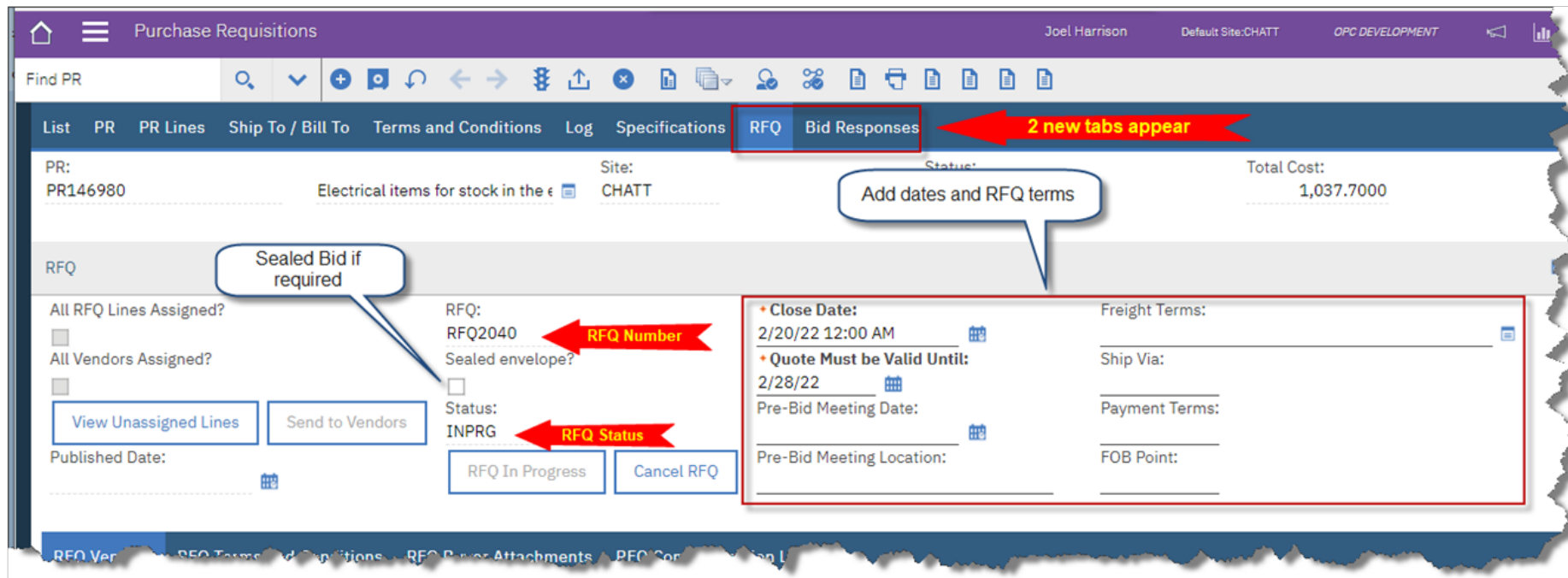
Create RFQ button is enabled. Click to create RFQ

Create RFQ
Create PO(s)



Sample RFQ: Inventory Items/Materials

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



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



Sample RFQ: Inventory Items/Materials

Add vendors to RFQ – Add Vendor button

The screenshot shows the 'RFQ Vendors' section of a system. A table lists vendors, with 'AMETEK POWER' selected. A 'Select Value' dialog box is open, displaying a list of vendors. A red arrow points to the 'Order Hub Vendor?' column header. A callout bubble states: 'Add a Vendor not found in the Select Vendors dialog manually by pressing the Add Vendor button.'

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

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



Sample RFQ: Inventory Items/Materials

Details

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

RFQ Lines for Vendor Filter 0 - 0 of 0

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

Select RFQ Lines

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

OK Cancel

Continue to add vendors and lines as required



Sample RFQ: Inventory Items/Materials

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

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

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

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

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

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



Sample RFQ: Inventory Items/Materials

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

The screenshot displays a software interface for managing RFQs and PR Lines. At the top, a navigation bar includes tabs for List, PR, PR Lines, Ship To / Bill To, Terms and Conditions, Log, Specifications, RFQ, and Bid Responses. The 'RFQ' tab is active, showing details for PR146980, including 'Electrical items for stock in the c', Site: CHATT, Status: WRFQ, and Total Cost: 1,037.7000.

Below the RFQ details, there are sections for 'RFQ Vendors', 'RFQ Terms and Conditions', 'RFQ Buyer Attachments', and 'RFQ Communication'. The 'RFQ Buyer Attachments' section is highlighted with a red box and contains three buttons: 'Add New File', 'Add New Web Page', and 'Add from Library'.

The 'PR Lines' section is also visible, showing a table with columns: Line, Line Type, Item, Description, Quantity, Order Unit, Unit Cost, Line Cost, Tax, and Load. A single line item is listed: Line 1, Material, Item STCRB121 STL-CTY RB121 3/4X1/2 REI, Quantity 20.0000, Order Unit EA, Unit Cost 1.2600, Line Cost 25.2000, Tax 0.0000, and Load 25.

A 'Line Attachments' dialog box is open over the PR Lines section. It has a table with columns: Document, Description, Document Folder, Document Version, Print?, and Application. One attachment is listed: SPEC LINE, Line attachment: DOCUMENTS, Document Folder, Document Version, Print?, and Application. Below the table are the same three buttons: 'Add New File', 'Add New Web Page', and 'Add from Library'. An 'OK' button is at the bottom right of the dialog.

Red arrows point to the 'RFQ' tab, the 'Add from Library' button in the RFQ Buyer Attachments section, the 'Line Attachments' dialog box, and the 'Line Attachments' button in the PR Lines section.

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.

Use the “Send to Vendors” button to publish the RFQ to the Vendors for bidding.

PR: PR146980 Electrical items for stock in the € Site: CHATT Status: WRFAQ Total Cost: 1,037.7000

RFQ: RFQ2040 Sealed envelope? Status: INPRG

Close Date: 2/20/22 12:00 AM Quote Must be Valid Until: 2/28/22

Buttons: [Send to Vendors](#) [RFQ In Progress](#) [Cancel RFQ](#)

RFQ Vendors

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

Buttons: [Select Vendors](#) [Add Vendor](#)



Sample RFQ: Inventory Items/Materials

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

The screenshot displays the RFQ management interface. At the top, there are several fields: 'All RFQ Lines Assigned?' (checked), 'All Vendors Assigned?' (checked), 'Send to Vendors' button, 'Published Date: 2/2/22 3:31 PM' (with a red arrow pointing to it), 'RFQ: RFQ2040', 'Sealed envelope?' (unchecked), 'Status: SENT', 'RFQ In Progress' button, 'Cancel RFQ' button, 'Close Date: 2/20/22 12:00 AM', 'Quote Must be Valid Until: 2/28/22', 'Pre-Bid Meeting Date:', 'Pre-Bid Meeting Location:', 'Freight Terms:', 'Ship Via:', 'Payment Terms:', and 'FOB Point:'. Below these fields is a navigation bar with tabs: 'RFQ Vendors', 'RFQ Terms and Conditions', 'RFQ Buyer Attachments', and 'RFQ Communication Log'. The 'RFQ Vendors' tab is active, showing a table with the following data:

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

A red arrow points to the 'PENDING' status in the table.

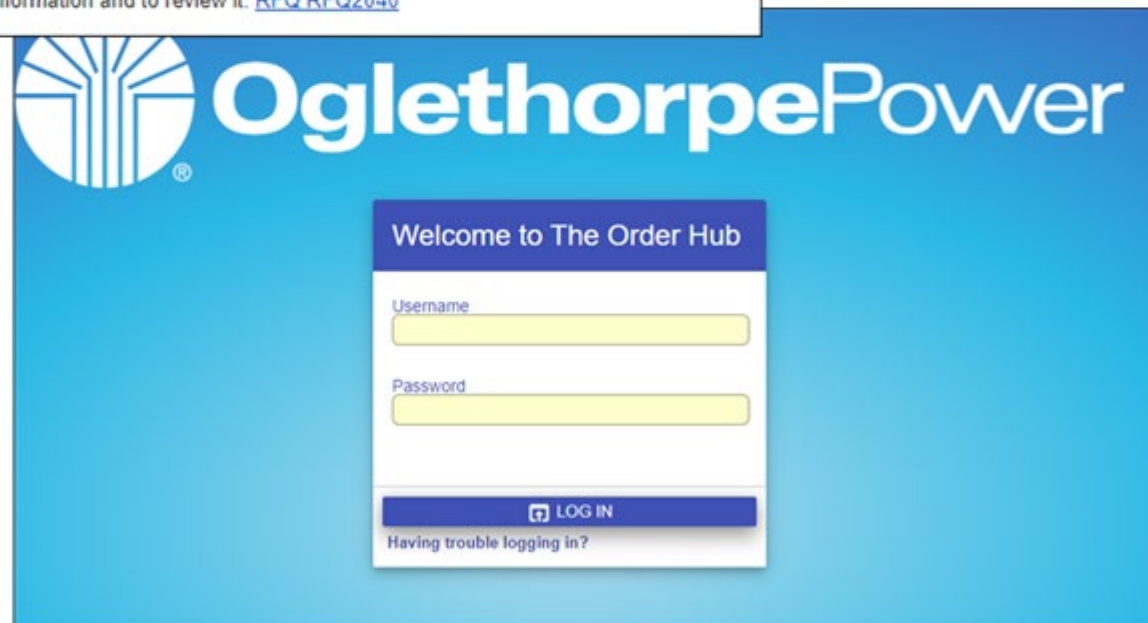
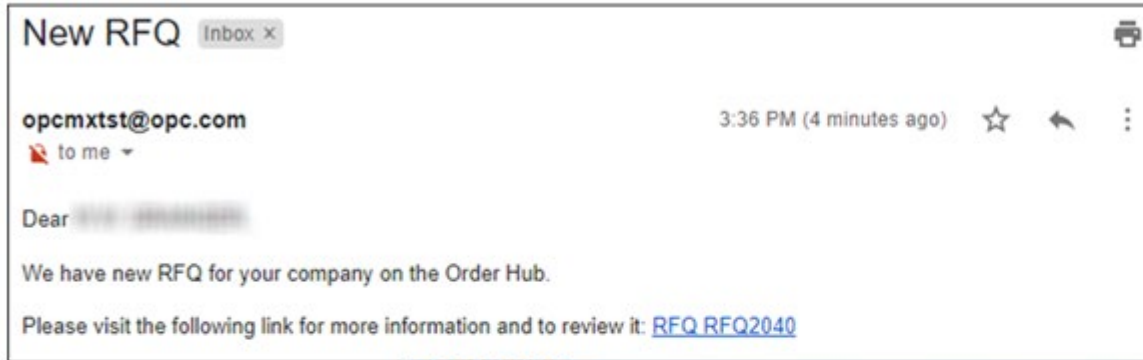
Quote status will change from DRAFT to PENDING for each vendor.

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



Sample RFQ: Inventory Items/Materials

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



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

The Order Hub - Development
Welcome, Biljana Jovanovic

P2Insight

REQUEST FOR QUOTATION

RFQ #: RFQ1262

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

Buyer Information

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

4d 13h 39m 4s

Status & Dates

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

Pre-Bid Meeting

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

Confirmed/Rejected

Date	Confirmed/Rejected Comment

Quote Submitted Date

Quote Must be valid until
01/31/2022

General Terms

This is a RFQ for a one time purchase

Payment Terms	Freight Terms
Ship Via	Fob Point

Currency: USD

Quote #: Quote Valid Until

Description: Replacement Pillows for UPS-A Batteries

RFQ Lines

Show 10 entries

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

Showing 1 to 3 of 3 entries

Review RFQ and confirm will Bid

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

Color Coded Lines help track progress of bid

The Order Hub - Development
Welcome, Bijana Jovanovic


REQUEST FOR QUOTATION

RFQ #: RFQ1262

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

← BACK
X DECLINE BID
UPDATE
REPORT A TECHNICAL ISSUE

Buyer Information



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

3d 23h 35m 29s

Status & Dates

Publish Date: 01/13/2022 02:54 | Close Date: 01/18/2022 02:44 | Status: CONFIRMED

Pre-Bid Meeting Date/Time: 01/17/2022 02:44 | Pre-Bid Meeting Location: Online meeting

Confirmed/Rejected Date: 01/14/2022 02:29 | Confirmed/Rejected Comment: Confirmed

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

General Terms

This is a RFQ for a one time purchase

Payment Terms: | Freight Terms: | Ship Via: | Fob Point: | Currency: USD | Quote #: | Quote Valid Until *:

Description: Replacement Pillows for UPS-A Batteries

RFQ Lines

Show 10 entries

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

Showing 1 to 3 of 3 entries

Ship To

Franklin, MA
10987 Oak Street
Franklin, MA, 03420

Reply To

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

Summary

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

Vendor Totals
Total: \$1,110.0000 USD

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

Yellow means work in progress – Internal Hold

Red line have not been updated yet!

Then for each line they enter Price and other details

Quotation line / RFQ Line # 1

DETAILS BUYER ATTACHMENTS (1) VENDOR ATTACHMENTS (0)

Buyer Request

Item # Description
12"X12X ABSORB & NEUTRALIZE PILLOW

Catalog Code Manufacturer Model #

Allow Substitution
No

Contract # Contract Price

Quantity UOM Delivery Date
30.00 EACH 01/31/2022

Remarks

Catalog Details

Catalog # Description *
12"X12X ABSORB & NEUTRALIZE PILLOW

Manufacturer Model #
ERG MFGa 1-SD5a

Vendor Response

We are responding with:
 Exactly as requested As requested, but with data corrections

Please explain the difference *
Manufacturer and Model# updated

Quantity *	UOM	Reason for Changed Quantity *
32.00	EACH	Packaging

Unit Price *	Currency	Line cost	Delivery Date
32.0000	USD	1024.0000	01/31/2022

Remarks
Line 1 Remarks - see long description

Not bidding on line

UPDATE CANCEL

Vendor can update any missing information

Vendor enter bid price

Vendor can chose NOT to bid on a line

Buyer Request

Vendor Response

Attachments can be sent at RFQ or RFQ Line level

The Order Hub - Development
Welcome, Biljana Jovanovic

REQUEST FOR QUOTATION

RFQ #: RFQ1262

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

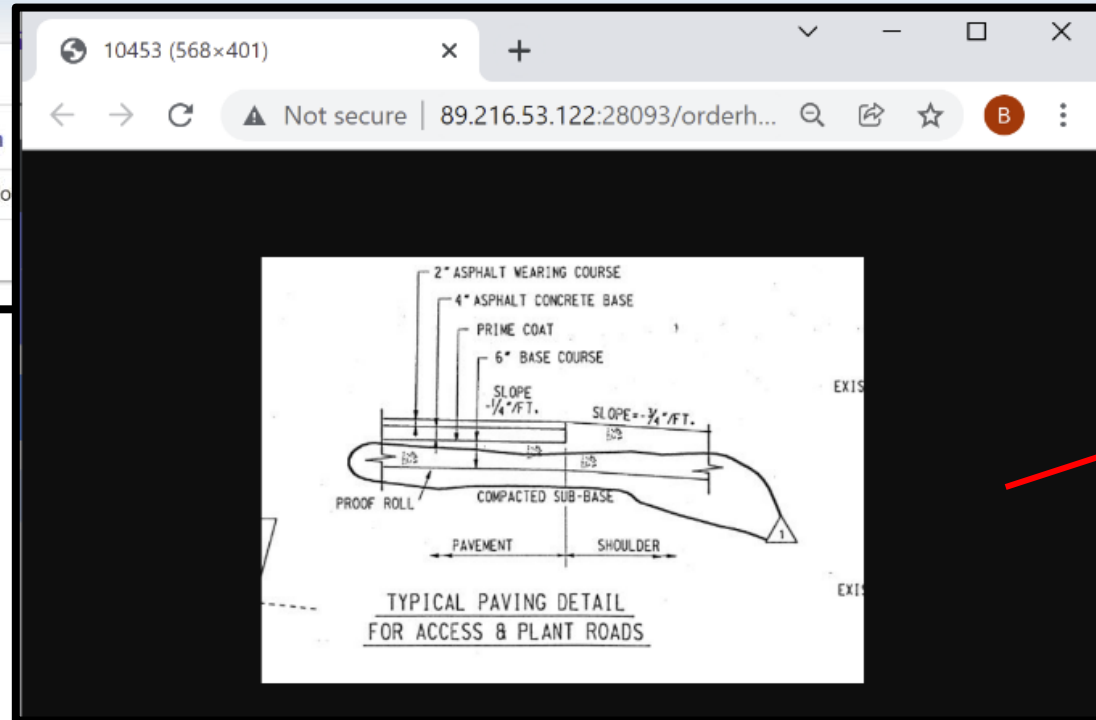
Documents

Id	Name	Description
SPEC1		RFQ spec do

Showing 1 to 1 of 1 entries

← BACK
X DECLINE BID
UPDATE
REPORT A TECHNICAL ISSUE

Type	Synced?	Actions
Attachments	No	↓



View or download

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

The Order Hub - Development
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REQUEST FOR QUOTATION

RFQ #: RFQ1262

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

State History

Show 10 entries

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

Showing 1 to 9 of 9 entries

Communication Log:
Buyer's email notifications
and your messages

System logged events:

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



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

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REQUEST FOR QUOTATION

RFQ #: RFQ1262

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

← BACK
UPDATE
SUBMIT TO CUSTOMER
REPORT A TECHNICAL ISSUE

State History

Show 10 entries CREATE COMMUNICATION LOG

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

Showing 1 to 9 of 9 entries

Message

To: opc.biljana@gmail.com

From: m.wilson@helwig.com

Subject: Request for Quote RFQ1262 notification

Message: Request for Quote RFQ1262 - additional information

Enter content here

Show 10 entries

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

Showing 0 to 0 of 0 entries

REPLY CANCEL

Status Change

To: m.wilson@helwig.com

From: opc.biljana@gmail.com

Subject: RE: Request for Quote RFQ1262 notification

Message:

ADD NEW DOCUMENT

Show 10 entries

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

Showing 0 to 0 of 0 entries

SAVE CANCEL



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

The Order Hub - Development
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REQUEST FOR QUOTATION

RFQ #: RFQ1262

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

← BACK


✕ DECLINE BID

🔄 UPDATE

📄 SUBMIT TO CUSTOMER

🚩 REPORT A TECHNICAL ISSUE

Buyer Information



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

3d 23h 28m 43s

Status & Dates

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

General Terms

This is a RFQ for a one time purchase

Payment Terms: Freight Terms:

Ship Via: Fob Point:

Currency: USD

Quote #: Quote Valid Until *:

Description: Replacement Pillows for UPS-A Batteries

RFQ Lines

Show 10 entries

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

Showing 1 to 3 of 3 entries



Sample RFQ: Inventory Items/Materials

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

RFQ Vendors RFQ Terms and Conditions RFQ Buyer Attachments RFQ Communication Log						
Vendor	Vendor Name	Order Hub Vendor?	Contact	Quote Status	Status Date	
358916	NABCO ELECTR	<input checked="" type="checkbox"/>	JANE NABCO	CONFIRMED	9/7/22 7:28 AM	
359334	MULLINS MECH	<input checked="" type="checkbox"/>	JOHN MULLINS	DECLINED	9/7/22 7:31 AM	

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

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



Sample RFQ: Inventory Items/Materials

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

Quotations for Vendor 80717 Filter 1 - 4 of 4

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

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

Buyer Request information displayed on the left

Vendor Response information displayed on the right



Sample RFQ: Inventory Items/Materials

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

Vendor Response Item Comparative Selection

RFQ Lines Filter 1 - 1 of 1

Line	Item	Not Awarding?	Vendor 1	Unit Cost	Awarded?	Vendor 2	Unit Cost	Awarded?	Vendor 3	Unit Cost	Awarded?	Vendor 4	Unit Cost	Awarded?
1	STCRB121 STL-CTY RB121 3/4X1/2 RED BUSH	<input type="checkbox"/>	100293	3.0000	<input type="checkbox"/>	80717	2.0000	<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>

Requested ←

Item: STCRB121 STL-CTY RB121 3/4X1/2 RED BUSH

Description: STCRB121 STL-CTY RB121 3/4X1/2 RED BUSH

Commodity Group:

Manufacturer:

Model:

Required Date:

Quantity: 20.0000

Order Unit: EA

Vendor 1

Vendor Name: AMETEK POWER INSTRUMENT

Description: STCRB121 STL-CTY RB121 3/4X1/2 RED BUSH

Catalog #:

Manufacturer: FORD MOTORS

Model: 101045

Delivery Date: 2/20/22

Quantity: 5.0000

UOM: EA

Unit Cost: 3.0000

Vendor 2

Vendor Name: W.W. GRAINGER

Description: STCRB121 STL-CTY RB121 3/4X1/2 RED BUSH

Catalog #:

Manufacturer:

Model:

Delivery Date: 2/20/22

Quantity: 20.0000

UOM: EA

Unit Cost: 2.0000

Responses are displayed side by side with differences highlighted in RED



Sample RFQ: Inventory Items/Materials

Request for Quote Details Report

RFQ1999: Fall 2022 Major (Project Name, Budget)

Site: CHATT Required Date: 8/24/22 Est. Total Cost: \$6.00
 Requested By: (Name) Requested Date: 8/24/22
 Status: FINALIZED Sealed Bid: No

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
<small>(Vendor Name)</small>	Quotation Lines Selected	\$3,972.32
	Regret	\$0.00

Bid Line Details

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

9/6/22 4:51 PM



Sample RFQ: Inventory Items/Materials

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

The screenshot shows a Maximo PR workflow interface. At the top, there is a navigation bar with tabs: List, PR, PR Lines, Ship To / Bill To, Terms and Conditions, Log, Specifications, RFQ, and Bid Responses. The main content area displays PR details for PR146980, including the description 'Electrical items for stock in the electrical cabinet in the I&C shop', the requester 'MILLEJOH', and the date '2/2/22 1:30 PM'. A 'Notes' section is visible but empty. A 'Details' tab is active, showing a table of dates and other information:

Details	Dates
Priority: 1	Status Date: 2/4/22 12:16 PM
Requested By: RAYC	Requested Date: 2/2/22 1:26 PM
Requested For: RAYC	Required Date: 2/20/22 12:00 AM

A 'Manual Input' dialog box is overlaid on the screen, containing the following options:

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

A callout bubble points to the 'Stop Workflow to Create PO' option with the text 'Reapproval was not required'. Below the options is a 'Memo:' field and 'OK' and 'Cancel' buttons.



Sample RFQ: Inventory Items/Materials

Before and after cost comparison

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

WF Last Memo Details:

Notes:

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

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



Sample RFQ: Inventory Items/Materials

Next, send award/regret notifications and finalize the RFQ

The screenshot shows a software interface with a top navigation bar containing tabs: List, PR, PR Lines, Ship To / Bill To, Terms and Conditions, Log, Specifications, RFQ, and Bid Responses. The 'Bid Responses' tab is currently selected.

Below the navigation bar, the following information is displayed:

- PR: PR146980
- Electrical items for stock in the electrical cabinet in the I&C shop
- Site: CHATT
- Status: APPR

Three buttons are visible: 'Update PR', 'Notify Vendors', and 'Remove unselected lines'. A callout box points to the 'Notify Vendors' button with the text: "Buyer must select **Notify Vendors** button to finalize RFQ (RFQ status FINALIZED). This triggers the integration to update the Order Hub and send notifications to vendors."

Below the buttons, the RFQ details are shown:

- RFQ: RFQ2040
- Sealed envelope?
- Status: SELECTED
- Published Date: 2/4/22 11:41 AM
- Quote Must be Valid Until: 2/28/22
- Close Date: 2/20/22 12:00 AM
- Buyer: HARRISJO



Sample RFQ: Inventory Items/Materials

The Create PO(s) button is now available.

The screenshot shows a software interface for an RFQ. The top navigation bar includes tabs: List, PR, PR Lines, Ship To / Bill To, Terms and Conditions, Log, Specifications, RFQ, and Bid Responses. The main content area displays details for PR146983, including dates, costs, and a 'Bid/Quote' section. A 'System Message' dialog box is overlaid, stating 'BMXZZ7125I - Successfully created PO's: 122002 for 80717;'. A callout box points to the 'Create PO(s)' button with the text 'Use the Create PO(s) button to create PO's'.

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

Awarded Notification



E-mail notification

The Order Hub - Development
Welcome, MATT WILEMON

87026.Admin

REQUEST FOR QUOTATION

RFQ #: RFQ1058

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

State History

Show 10 entries

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

Showing 1 to 4 of 4 entries

Event Log record

Message

To: jovanovic_biljana@yahoo.ca

From: opcmaximohelp@opc.com

Subject: Awarded Quotation Lines

Message

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

Show 10 entries

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

Showing 0 to 0 of 0 entries

CANCEL

Awarded RFQs – Winning Vendors

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

REQUEST FOR QUOTATION

RFQ #: RFQ1058

[← BACK](#)
[REPORT A TECHNICAL ISSUE](#)

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

Buyer Information

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

EXPIRED

Status & Dates

Publish Date	Close Date	Status
10/19/2021 11:18	10/29/2021 00:00	SELECTED
Pre-Bid Meeting Date/Time	Pre-Bid Meeting Location	
Confirmed/Rejected Date	Confirmed/Rejected Comment	
10/19/2021 11:39	Confirmed.	
Quote Submitted Date	Quote Must be valid until	
10/19/2021 11:41	10/30/2021	

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

General Terms

This is a RFQ for a one time purchase

Payment Terms: _____ Freight Terms: _____

Ship Via: _____ Fob Point: _____

Currency: USD

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

Description: Demo requisition

RFQ Lines

Show 10 entries

Awarded Lines

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

Showing 1 to 4 of 4 entries

Awarded RFQs – Regret Vendors

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


REQUEST FOR QUOTATION

RFQ #: RFQ1260

← BACK
REPORT A TECHNICAL ISSUE

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

Buyer Information



Name
Oglethorpe Power

Address: OPC, OPC, WI, 5461211
E-mail: opcmaximohelp@opc.com
Contact name: Ricardia Brutus
Phone: 1770-270-7058

EXPIRED

Status & Dates

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

Regrets. No lines have been awarded to your company.

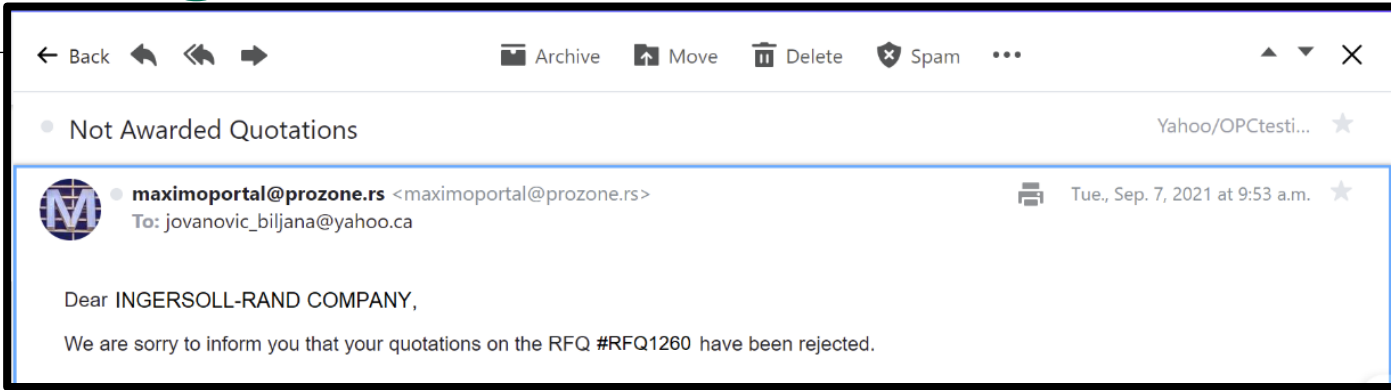
General Terms

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

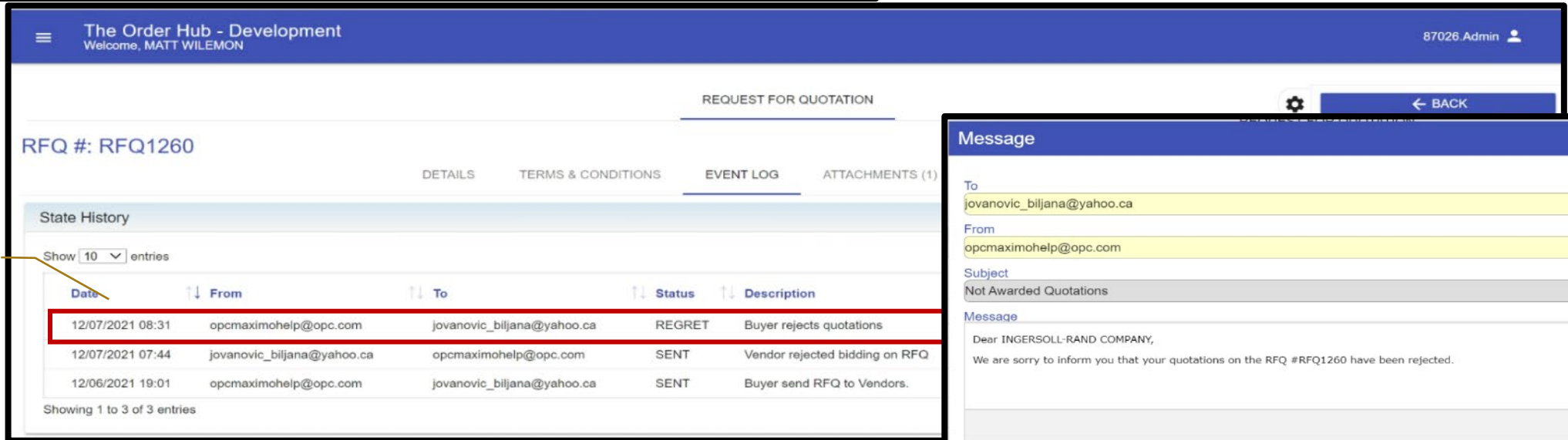
Payment Terms	Freight Terms
Ship Via	Fob Point
Currency	
USD	
Quote #	Quote Valid Until
Description Order hub test spec char	

REGRET message and RFQ status change to REGRET

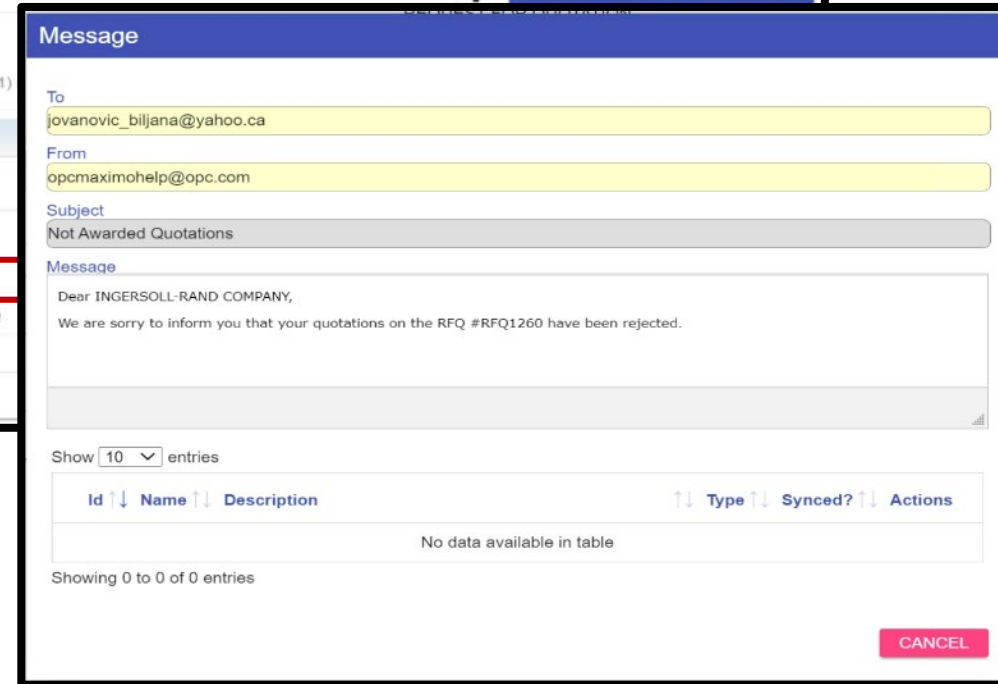
Regret Notification



E-mail notification



Event Log record



RFQ for Services Contracts

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

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

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

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



Sample RFQ: Contracts

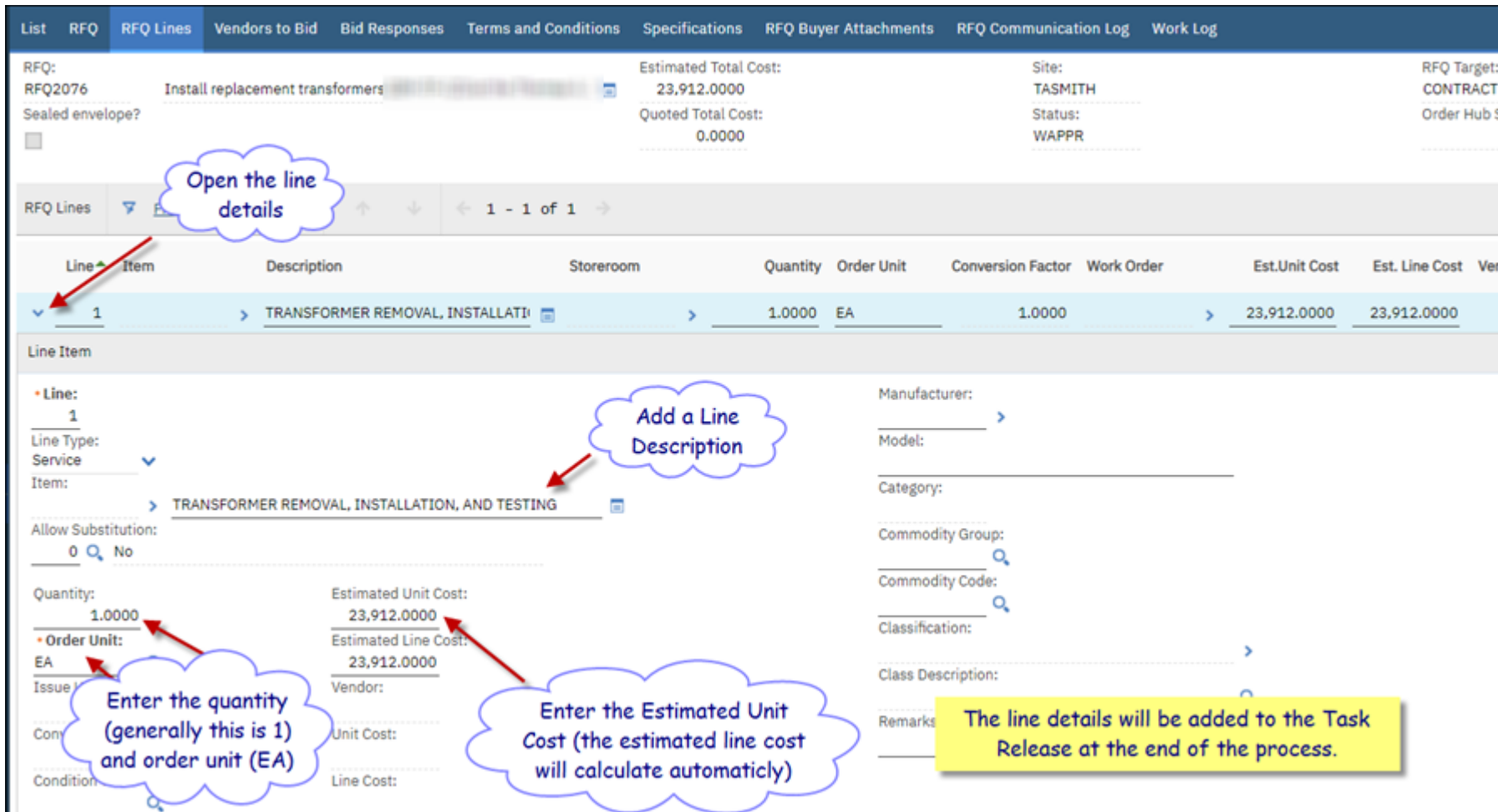
The User (Not Supply Chain) creates an RFQ

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

List	RFQ	RFQ Lines	Vendors to Bid	Bid Responses	Terms and Conditions	Specifications	RFQ Buyer Attachments	RFQ Communication Log	Work	
RFQ:	RFQ2002	Purchase and install firewater booster pump at Talbot Energy Fac			Estimated Total Cost:	0.0000	Site:	TALBOT	RFQ Target:	CONTRACT
Sealed envelope?	<input type="checkbox"/>	<div style="border: 1px solid blue; border-radius: 50%; padding: 5px; display: inline-block;">Add Description</div>			Quoted Total Cost:	539,375.0000	Status:	WAPPR	Order Hub Status:	
							Status Date:	8/25/22 8:17 AM	Order Hub Status Date:	8/25/22 8:17 AM
Details		Dates			<div style="border: 1px solid blue; border-radius: 50%; padding: 5px; display: inline-block;">Enter the contract estimated start and end dates</div>			Terms		
Requested By:	ASHBY				• Contract Start Date:	9/1/22	Freight Terms:			
Buyer:					• Contract End Date:	12/31/22	Payment Terms:			
CP&TS:	Y				Reply Date:		Ship Via:			
• Priority:	1				Published Date:		FOB Point:			
Entered By:	ASHBY									
Type:										

Sample RFQ: Contracts

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



The screenshot shows the 'RFQ Lines' tab in a software application. At the top, there are navigation tabs: List, RFQ, RFQ Lines, Vendors to Bid, Bid Responses, Terms and Conditions, Specifications, RFQ Buyer Attachments, RFQ Communication Log, and Work Log. The main header area displays RFQ details: RFQ: RFQ2076, Description: Install replacement transformers, Estimated Total Cost: 23,912.0000, Site: TASMITH, and RFQ Target: CONTRACT. Below this is a table of RFQ Lines with one line item: Line 1, Description: TRANSFORMER REMOVAL, INSTALLATI, Quantity: 1.0000, Order Unit: EA, Conversion Factor: 1.0000, Est. Unit Cost: 23,912.0000, and Est. Line Cost: 23,912.0000. A red arrow points to the line number '1' with a callout bubble that says 'Open the line details'. Below the table, the 'Line Item' details are shown. A red arrow points to the description field with a callout bubble that says 'Add a Line Description'. Another red arrow points to the 'Quantity' field (1.0000) with a callout bubble that says 'Enter the quantity (generally this is 1) and order unit (EA)'. A third red arrow points to the 'Estimated Unit Cost' field (23,912.0000) with a callout bubble that says 'Enter the Estimated Unit Cost (the estimated line cost will calculate automatically)'. A yellow box at the bottom right contains the text: 'The line details will be added to the Task Release at the end of the process.'



Sample RFQ: Contracts

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

RFQ: RFQ2076 Install replacement transformers Site: TASMITH RFQ Target: CONTRACT

Sealed envelope? Status: WAPPR Order Hub Status:

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

[Add New File](#) [Add New Web Page](#) [Add from Library](#)

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



Sample RFQ: Contracts

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

Manual Input

Submit RFQ for Review

Send RFQ to Contract Admin to Cancel

Memo:

OK Cancel

RFQ Vendors	Filter	Vendor	Vendor Name	Contact
▼		352922	INDUSTRIAL AI	JERRY AIR



Sample RFQ: Contracts

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

The screenshot shows a software interface for managing RFQs. The main window displays details for RFQ 2076, titled 'Install replacement transformers'. A pop-up window titled 'View Workflow Assignments' is overlaid on the main content. This pop-up contains a table with one entry: 'RFQ Ready for your Review' with a process of 'RFQFLOW' and revision '5'. Below the table are buttons for 'View Workflow History', 'View Workflow Map', and 'OK'.

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



Sample RFQ: Contracts

The Contract Administrators complete the following steps:

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

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



Sample RFQ: Contracts

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

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

Sealed envelope?

RFQ In Progress

All RFQ Lines Assigned?

All Vendors Assigned?

View Unassigned Lines

Send to Vendors

Close Date:

Site: TALBOT

RFQ Target: CONTRACT

Status: INPRG

Order Hub Status:

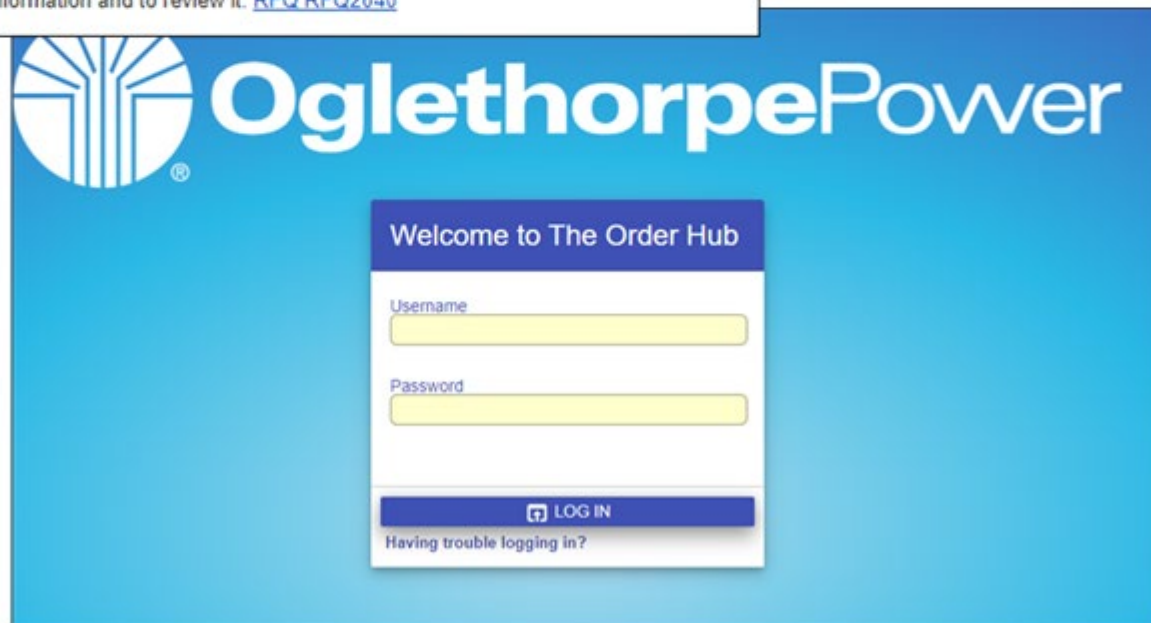
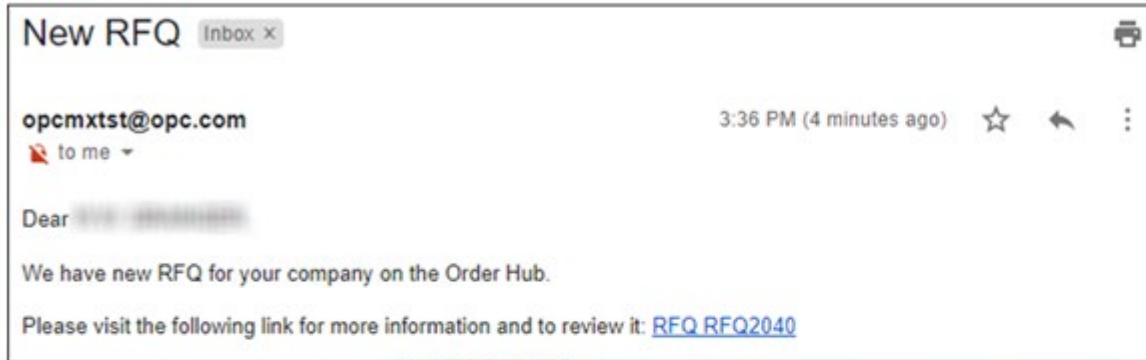
RFQ Vendors [Filter](#) > < 1 - 2 of 2 >

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

Select Vendors Add Vendor Select Commodity Vendors

Vendor Order Hub Screens

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





Sample RFQ: Contracts

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

RFQ: RFQ2076 Install replacement transformers

Site: TASMETH RFQ Target: CONTRACT

Status: BIDSELECT Order Hub Status: SENT

Close Date: 2/25/22 12:00 AM

Line	Item	Not Awarding?	Vendor 1	Unit Cost	Awarded?	Vendor 2	Unit Cost	Awarded?	Vendor 3	Unit Cost	Awarded?	Vendor 4	Unit Cost
1			233569	26,000.0000		352922	23,000.0000		350916				

Requested Vendor 1 Vendor 2 Vendor 3 Vendor 4

Item: TRANSFORMER REMOVAL, INSTALLATION, AND TESTING; VALVES

Quantity: 1.0000

Low Bid Unit Cost: 23,000.0000

Unit Cost: 26,000.0000 (Vendor 1)

Unit Cost: 23,000.0000 (Vendor 2)

Supplier Remarks: (Vendor 3)



Sample RFQ: Contracts

- ▶ Picks winning Bid and Enters Bid exception information

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

Check the Awarded flag to accept the bid

Enter bid exception information



Sample RFQ: Contracts

Request for Quote Details Report										
RFQ1422: Batteries Replacement at the Effingham Energy Facility										
Site: EFFINGHA 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	12V BATTERIES	1	DOLLAR	\$240,464.00	\$240,464.00					
2	12V BATTERIES	1	DOLLAR	\$156,008.00	\$156,008.00					
3	12V BATTERIES	1	DOLLAR	\$156,008.00	\$156,008.00					
4	12V BATTERIES	1	DOLLAR	\$126,683.00	\$126,683.00					
				Total	\$679,163.00					
Vendor Name										
				Vendor Name	Status	Total Bid				
				REGENT POWER SOLUTIONS, LLC	Regret	\$690,883.00				
				REGENT POWER SOLUTIONS, LLC	Regret	\$0.00				
				REGENT POWER SOLUTIONS, LLC	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	
REGENT POWER SOLUTIONS, LLC	\$0.00								\$0.00	
REGENT POWER SOLUTIONS, LLC	\$223,935.00	10/7/22		No					\$223,935.00	
REGENT POWER SOLUTIONS, LLC	\$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	
REGENT POWER SOLUTIONS, LLC	\$0.00								\$0.00	



Sample RFQ: Contracts

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

The screenshot displays the IBM procurement system interface for an RFQ. The top navigation bar includes the IBM logo and user information. The main content area shows the RFQ details for RFQ2076, titled "Install replacement transformers". The status is "FINALIZED" and the close date is 2/25/22 12:00 AM. Below this, the "Vendor Response" tab is active, showing a table of vendors and their responses. The table has columns for Sequence, Vendor, Vendor Name, Order Hub Vendor?, Contact, Quote Status, and Status Date. Three vendors are listed: Vendor 1 (233569) with contact NANCY CONTR and status "SELECTED"; Vendor 2 (352922) with contact JERRY AIR and status "REGRET"; and Vendor 3 (358916) with status "REGRET". A "Create Contract" button is visible in the bottom left, and a "Create Contract" dialog box is open in the bottom right, showing the contract details and an "Autonumber" button. Hand-drawn annotations include a cloud labeled "Award and Regret notifications sent to vendors" pointing to the "SELECTED" and "REGRET" statuses, and another cloud labeled "Create Contract" pointing to the "Create Contract" button.

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



Issues Experienced

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

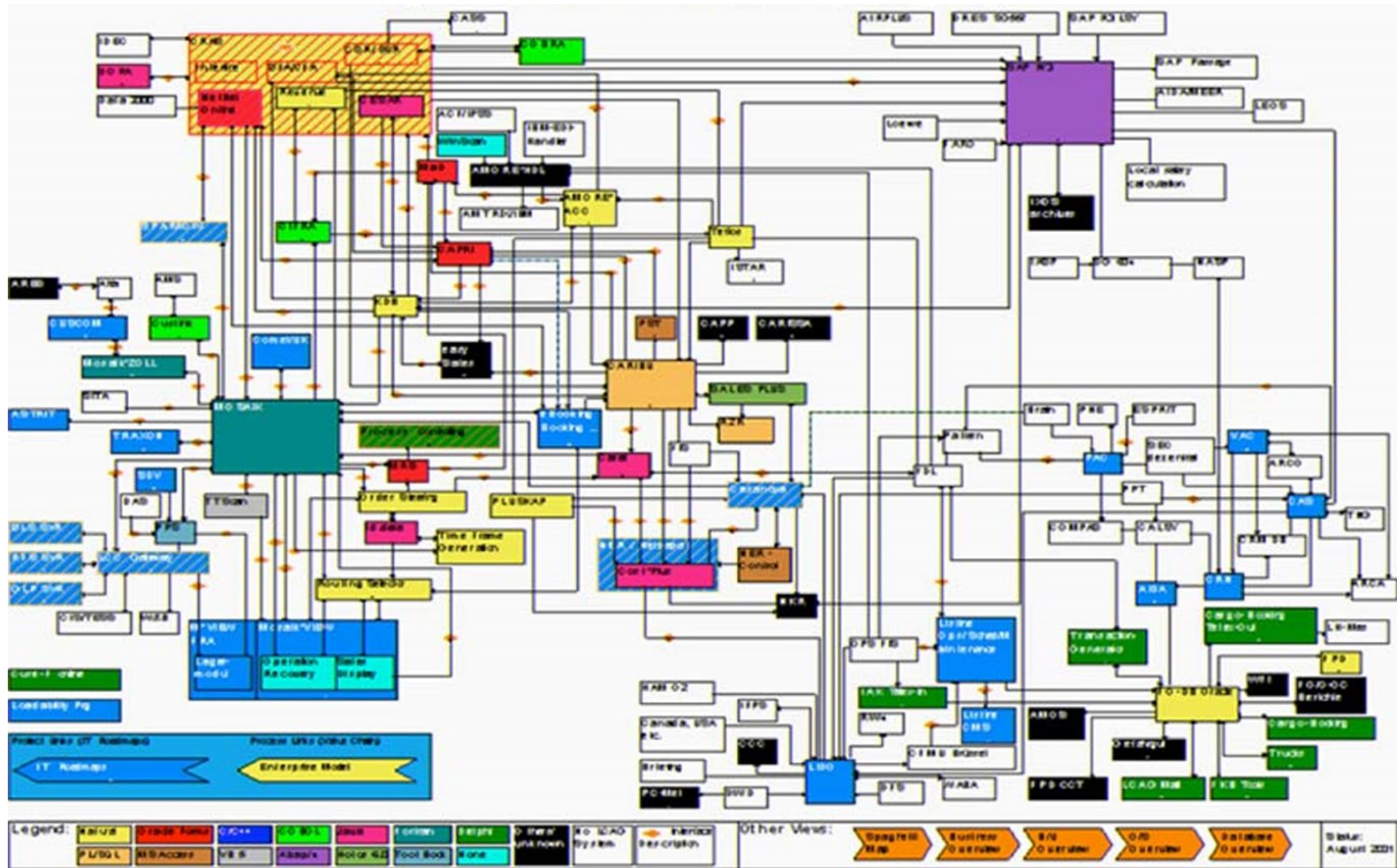
Opportunities in OPC

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

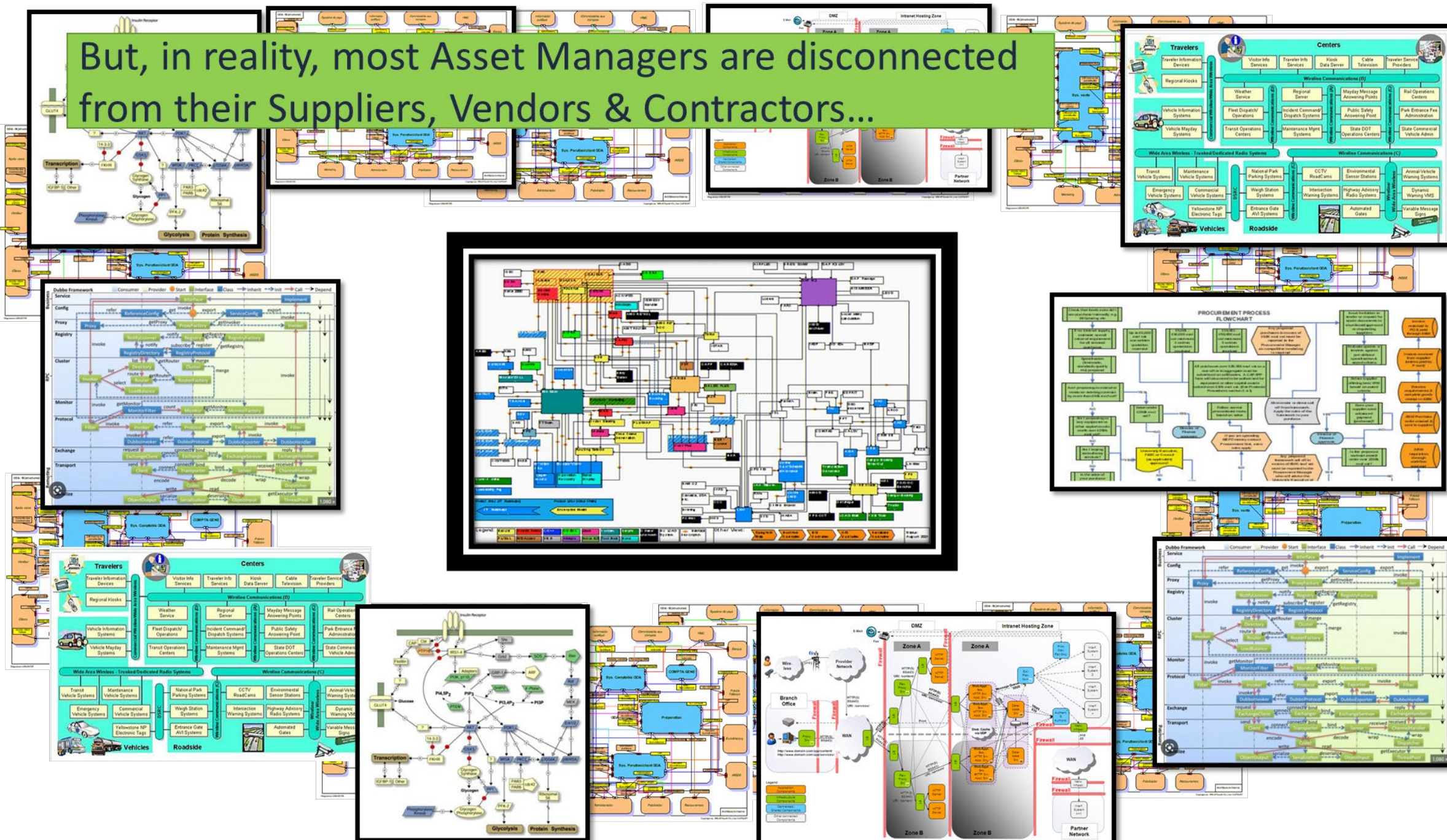
Further Opportunities using P2Insight

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

Most Maximo Users think their systems chart looks like this



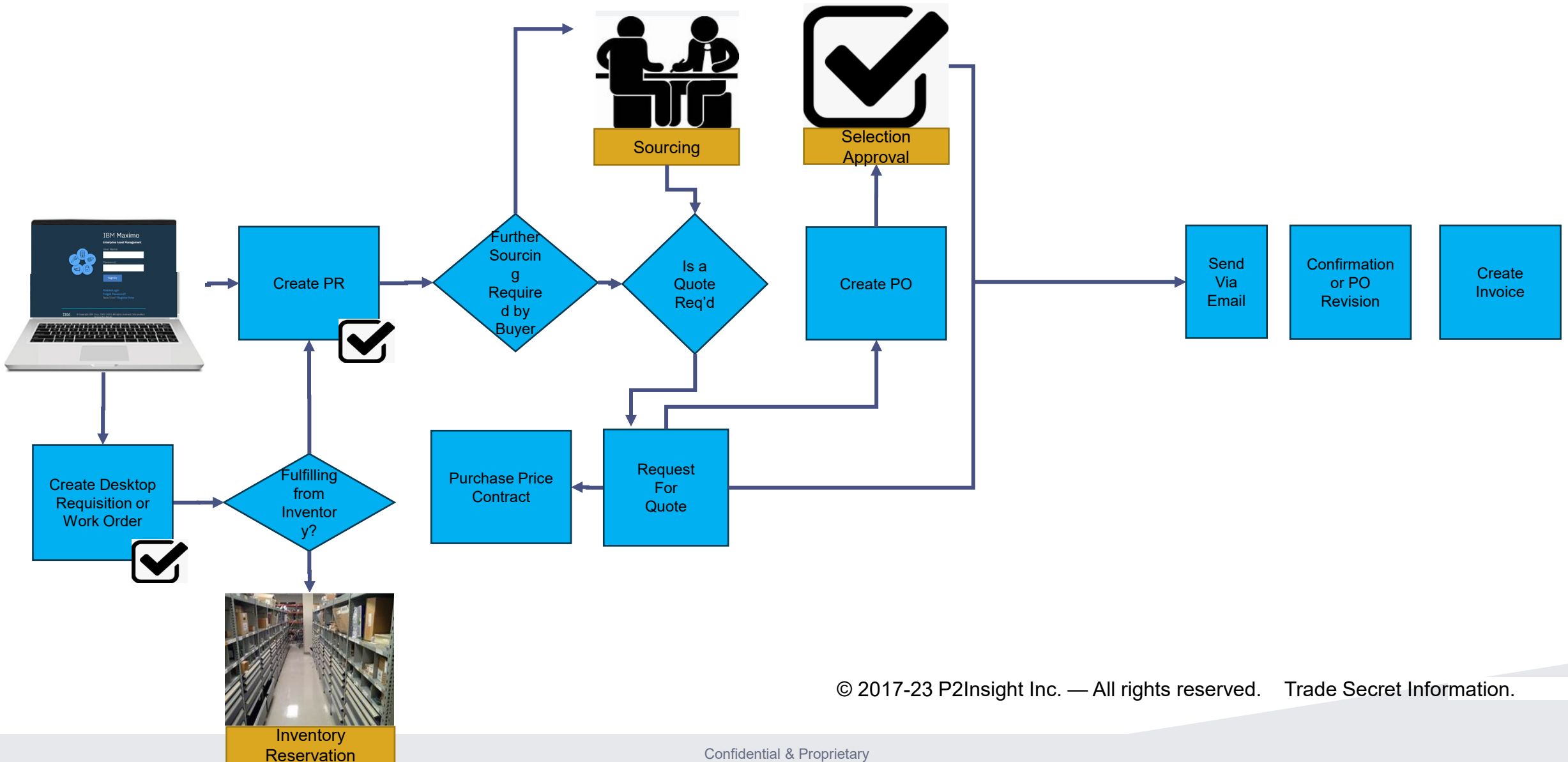
But, in reality, most Asset Managers are disconnected from their Suppliers, Vendors & Contractors...



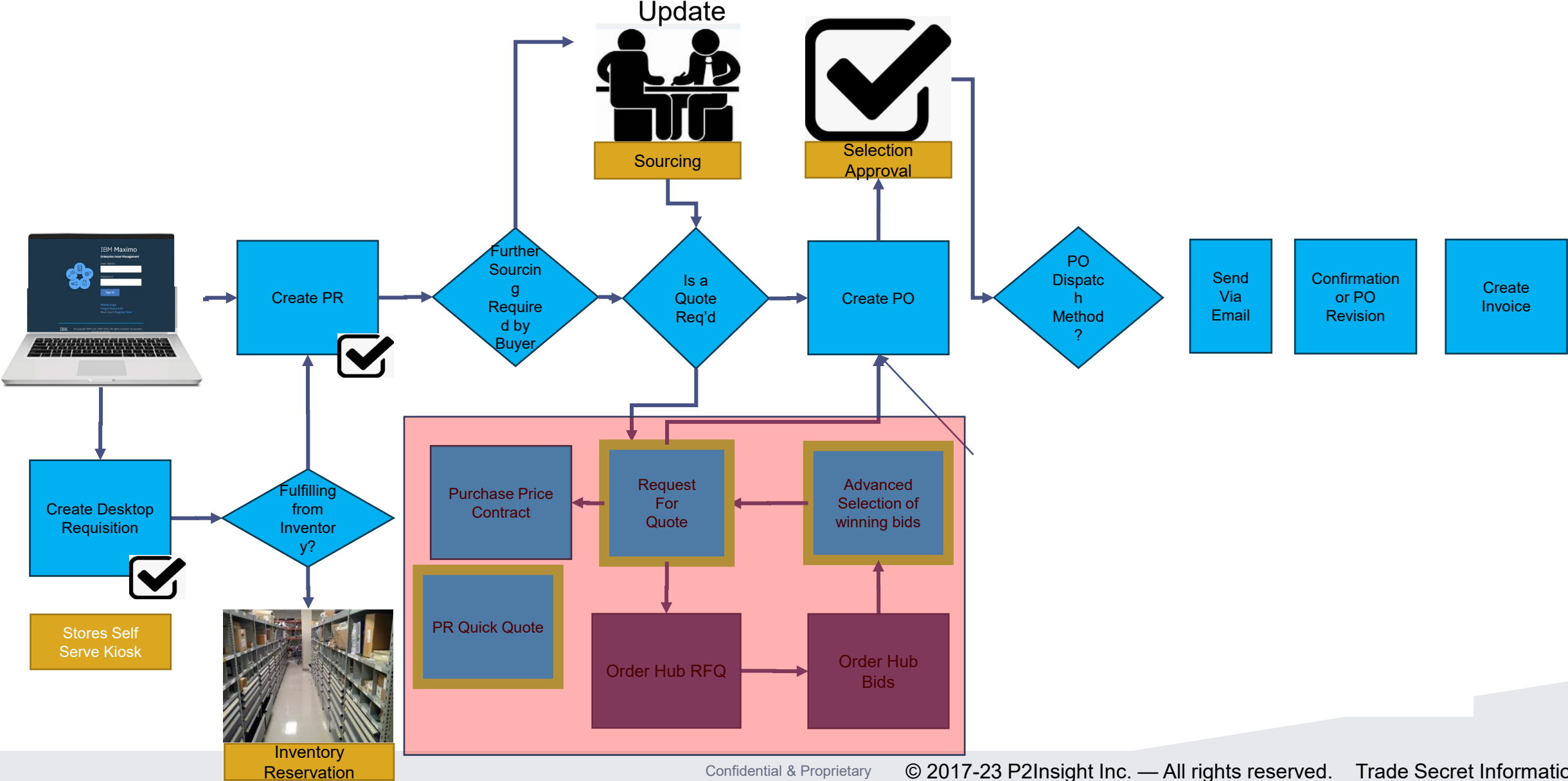
OPC started with one of two of the most common first step with e-commerce

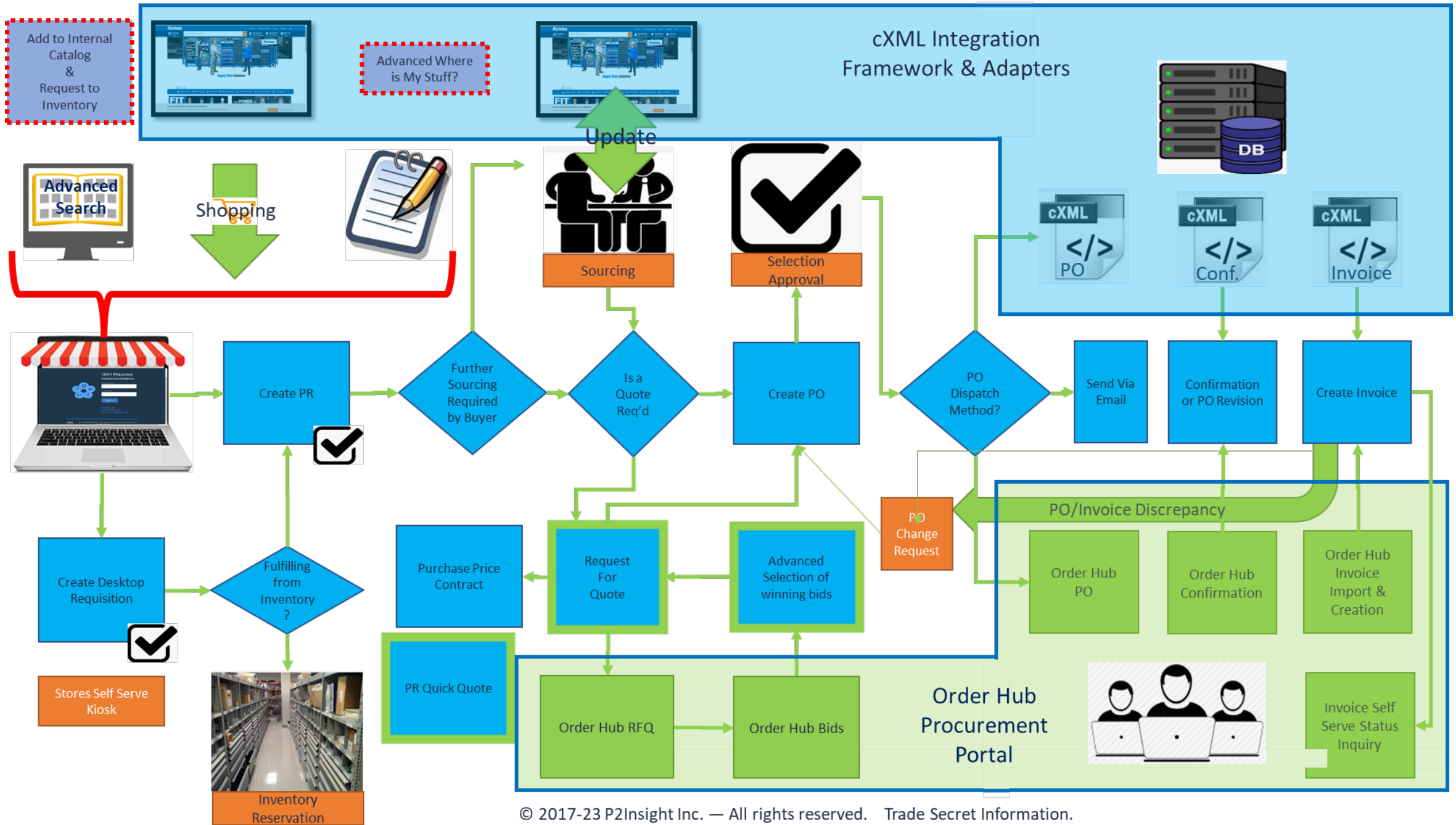
- ▶ Request for Quotations – most companies need a fast and easy way to get quotes for parts and services, for one-off PO's and/or Contracts
- ▶ The other is... Punchout Catalog Shopping direct from Maximo WO or PR applications

This is base Maximo...



OPC Deployment...





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If More Info Needed

- **Contact Information**

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

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brad.vannote@opc.com

tyler.lyon@gasoc.com

- **P2Insight Contact**

- **Mike Popovic (President)**

mike.popovic@P2insight.com

C A F E

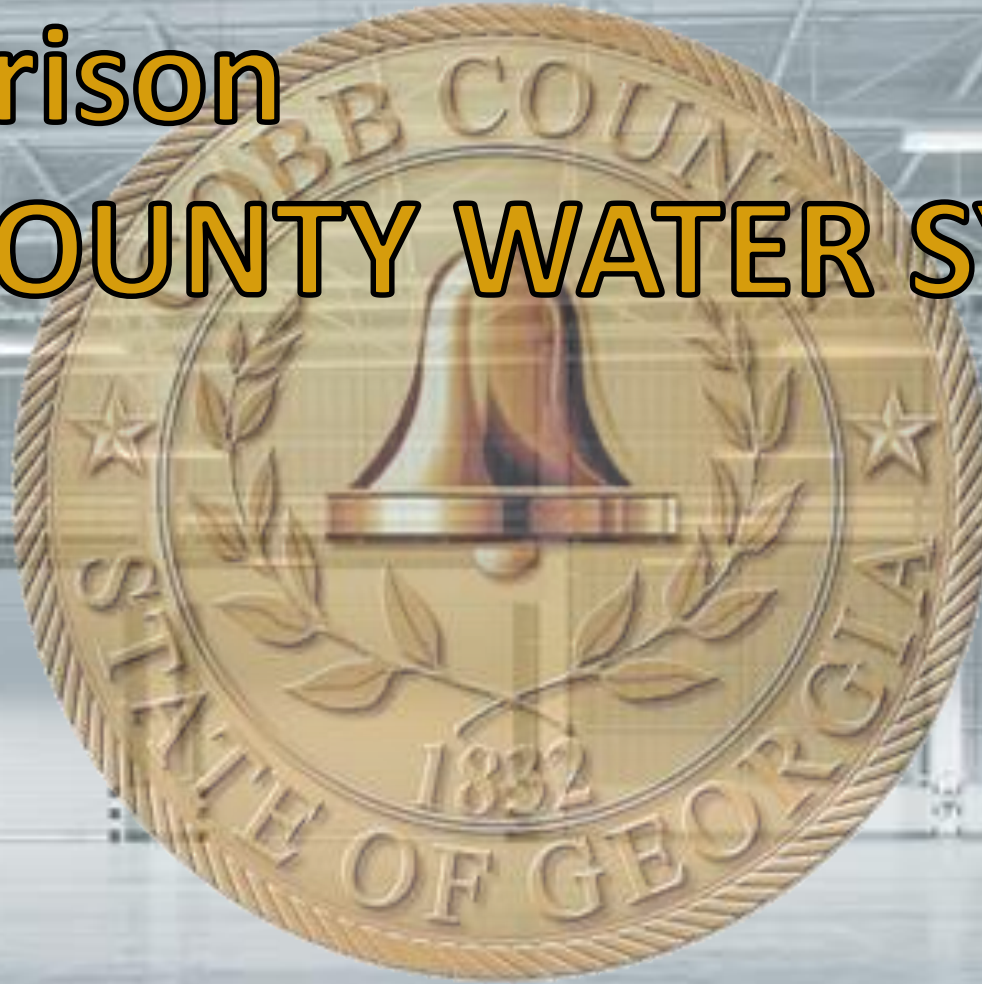
ADVENTURES
IN
INVENTORY

• 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!

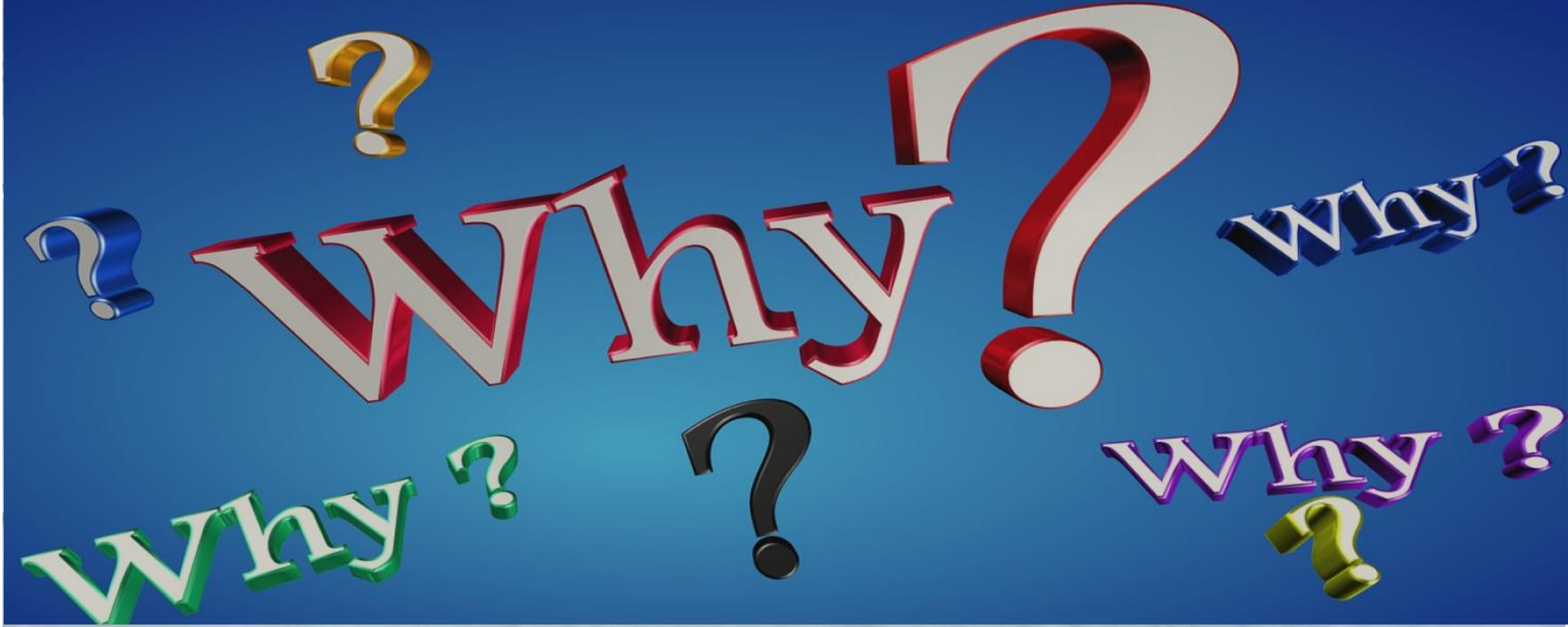




A woman with long brown hair and glasses is shown in a warehouse setting, looking down with a frustrated expression. She is surrounded by stacks of cardboard boxes. The background shows the industrial structure of the warehouse with high ceilings and metal beams. The scene is dimly lit, with a single light fixture visible in the distance.

**I HAVE ABSOLUTELY
NO IDEA**

peacock



**WHAT COULD
BE GAINED
FROM
TRACKING
INVENTORY???**





❖ THE STARTING POINT

START



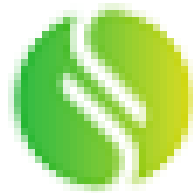
❖ THE STARTING POINT
❖ IDENTIFY EACH ITEM



❖ 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

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

Modifiers for ADAPTER

NO MODIFIER
COMMUNICATIONS
CONDUIT
DRILL
HOSE
HOSE TO PIPE
LAMP SOCKET
PIPE
PLUG TO RECEPTACLE
SANITARY TUBE
SOCKET DRIVE
TUBE
TUBE TO HOSE
TUBE TO PIPE

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

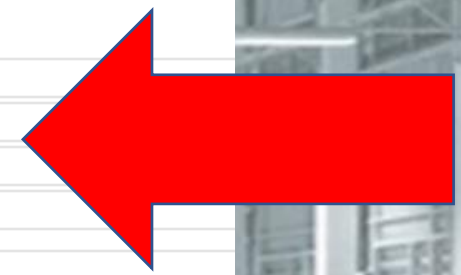
11"

MATERIAL

CONNECTION

Corporate Free Form Text
(6000 characters)

PUMP BODY



Stock Number: 001739

Short and Long Description

Characteristic Value Data

Noun

Modifier

ADAPTER

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





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

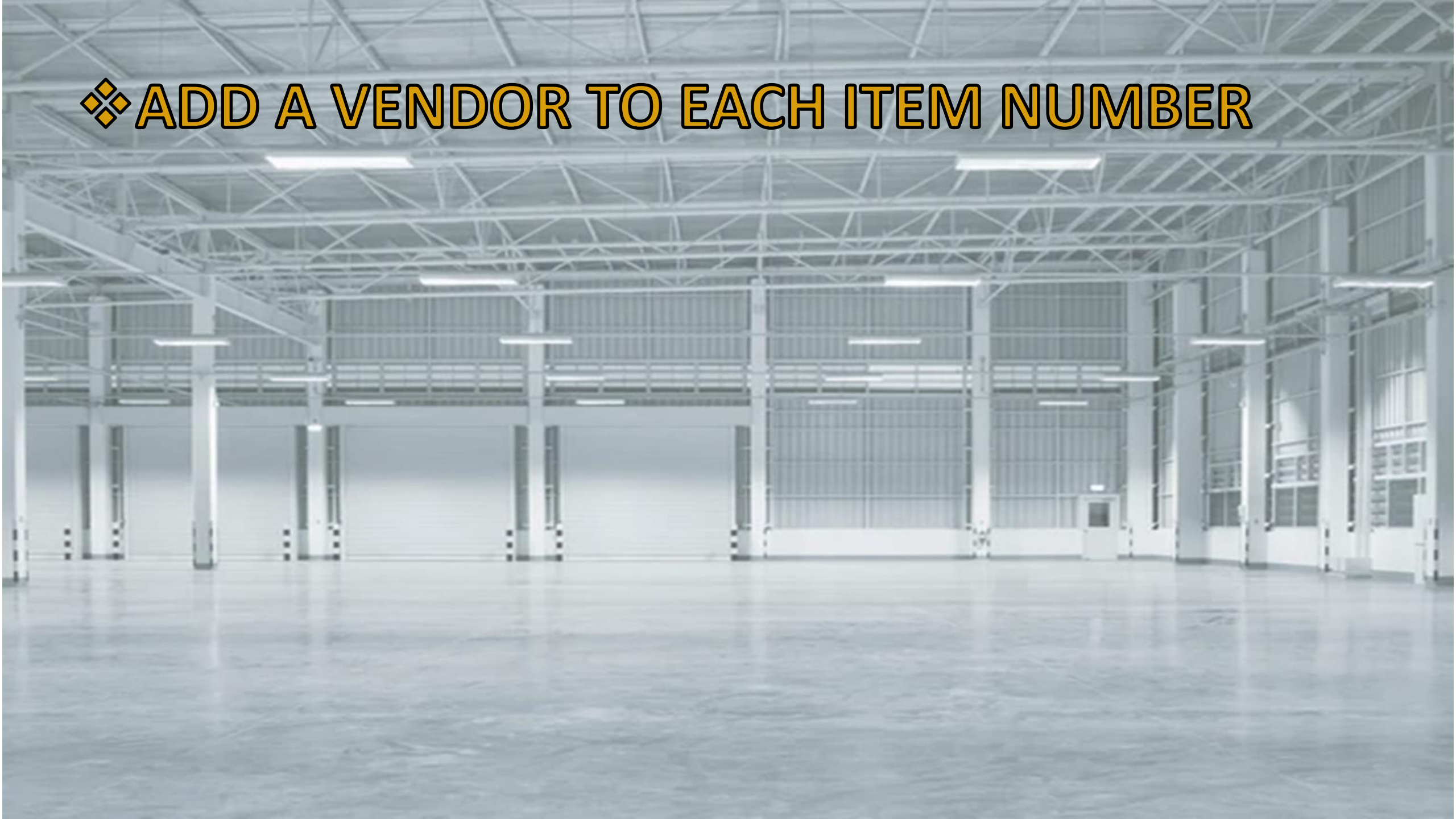
 003453  REDUCER: PUMP DEW-A-4-E-1A	 003452  SHAFT, PUMP DEW-A-4-E-1B	 003469  SEAL: GREASE DEW-A-4-E-1C
 003468  BEARING, BALL DEW-A-4-E-1D	 003464  BEARING, BALL DEW-A-4-E-1E	 003456  MATERIAL: PACKING DEW-A-4-E-1F
 003454  KIT: BEARING DEW-A-4-E-2A	 003455  COVER: BEARING DEW-A-4-E-2B	 003470  GLAND, 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


 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




NEXT STEP

❖ **ADD A VENDOR TO EACH ITEM NUMBER**



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

Storeroom: SOUTHCOBB > SOUTH COBB WRF GENERAL 

Reorder Details

Primary Vendor


Reorder?

+ Reorder Point: 0.00

+ Lead Time (Days): 0

Safety Stock: _____

+ Economic Order Quantity: 1.00

Order Unit: EA 

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

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

Storeroom: SOUTHCOBB > SOUTH COBB WRF GENERAL 

Reorder Details 
Primary Vendor 


Reorder? Primary Vendor: VS0000013933 > TEKWELL SERVICES  Internal?








+ Reorder Point: 0.00 Manufacturer: _____ > _____  Storeroom: _____ 











+ Lead Time (Days): 0 Model: RK114-375R Storeroom Site: _____ 

Safety Stock: _____ Catalog #: RK114-375R

+ Economic Order Quantity: 1.00

Order Unit: EA 

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

Vendor	Manufacturer	Model	Catalog #	Order Unit	Last Price	Last Order Date	Organization	Site
> <u>5596</u> >	>	<u>RK114-375R</u>	<u>6CUP1</u>	<u>EA</u> 	<u>78.77</u>	<u>3/11/22</u> 	<u>COBBGOV</u> 	<u>WATER</u>  
> <u>VS0000013933</u> >	>	<u>RK114-375R</u>	<u>RK114-375R</u>	<u>EA</u> 	<u>66.34</u>	<u>2/13/23</u> 	<u>COBBGOV</u> 	<u>WATER</u>  

New Row




❖ ADD A VENDOR TO EACH ITEM NUMBER

❖ ADD THE COST OF EACH ITEM NUMBER


Item: 008734 > KIT,O-RING 

Site: WATER

[Attachments](#) 

Storeroom: SOUTHCOBB > SOUTH COBB WRF GENERAL 

Status: ACTIVE

+Issue Unit: EA 

Inventory Org: _____

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

Condition Enabled?

Lot Type: NOLOT

Default Stage Bin: _____

Rotating?

Issue Cost Type: STANDARD

Capitalized?

Consignment?





[Adjust Current Balance](#)







Kit?



Requires hard reservation on use?

Receipt Tolerance %: _____

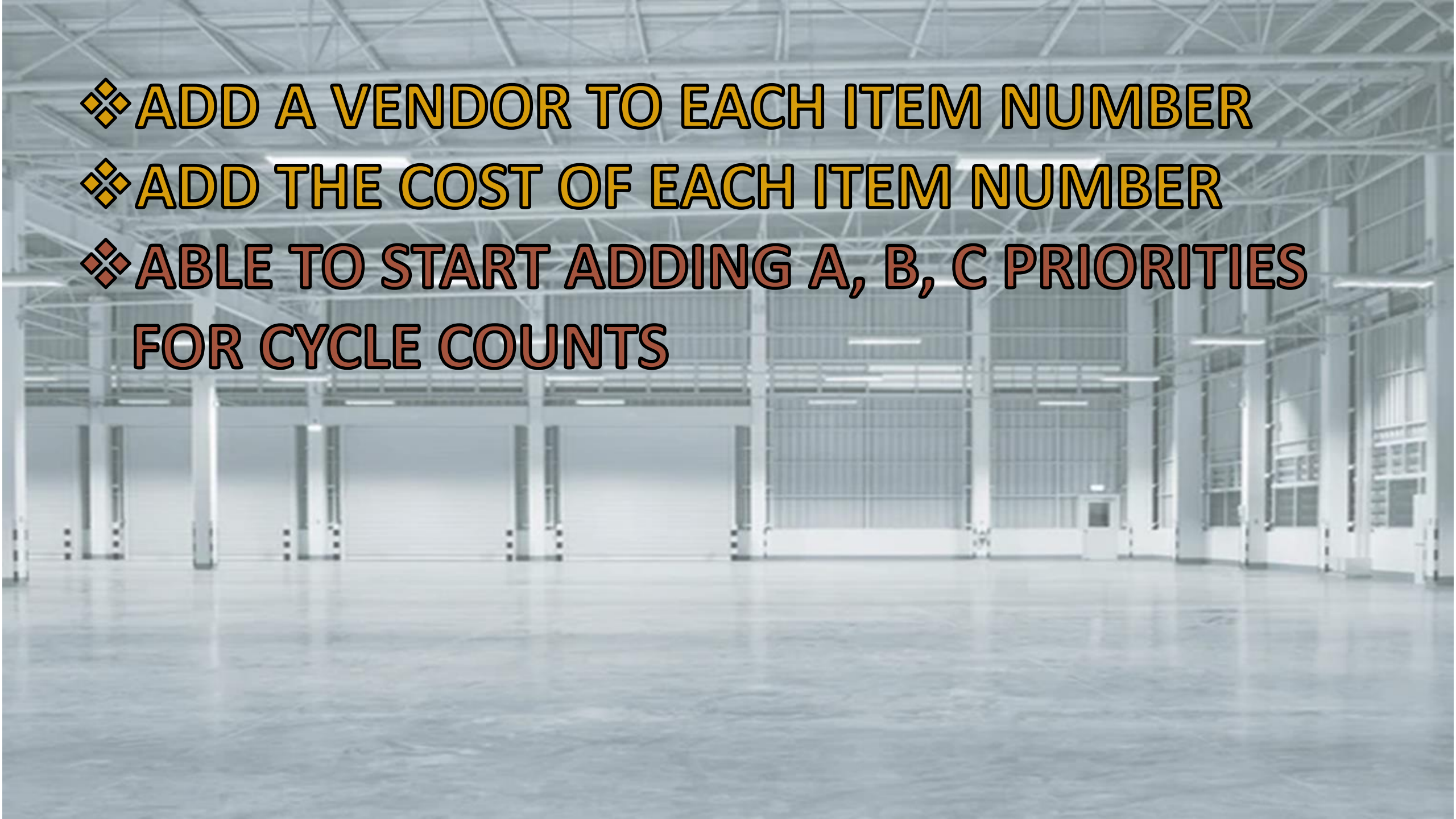
Critical?

- [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


Item: 008734 > KIT,O-RING 

Site: WATER

[Attachments](#) 

Storeroom: SOUTHCOBB > SOUTH COBB WRF GENERAL 

Status: ACTIVE

+ Issue Unit: EA 

Inventory Org: _____

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

Condition Enabled?

Lot Type: NOLOT

Default Stage Bin: _____

Rotating?

Issue Cost Type: STANDARD

Capitalized?

Consignment?


Adjust Current Balance

Kit?


Requires hard reservation on use?


Receipt Tolerance %: _____


Critical?

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


Item: 008734 > KIT,O-RING 

Site: WATER

[Attachments](#) 

Storeroom: SOUTHCOBB > SOUTH COBB WRF GENERAL 

Status: ACTIVE

+ Issue Unit: EA 

Inventory Org: _____

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

Condition Enabled?

Lot Type: NOLOT

Default Stage Bin: _____

Rotating?

Issue Cost Type: STANDARD

Capitalized?

Consignment?

Adjust Current Balance

Kit?


Requires hard reservation on use?


Receipt Tolerance %: _____


Critical?

Available Balance Summary 

Other Balance Summary Information 

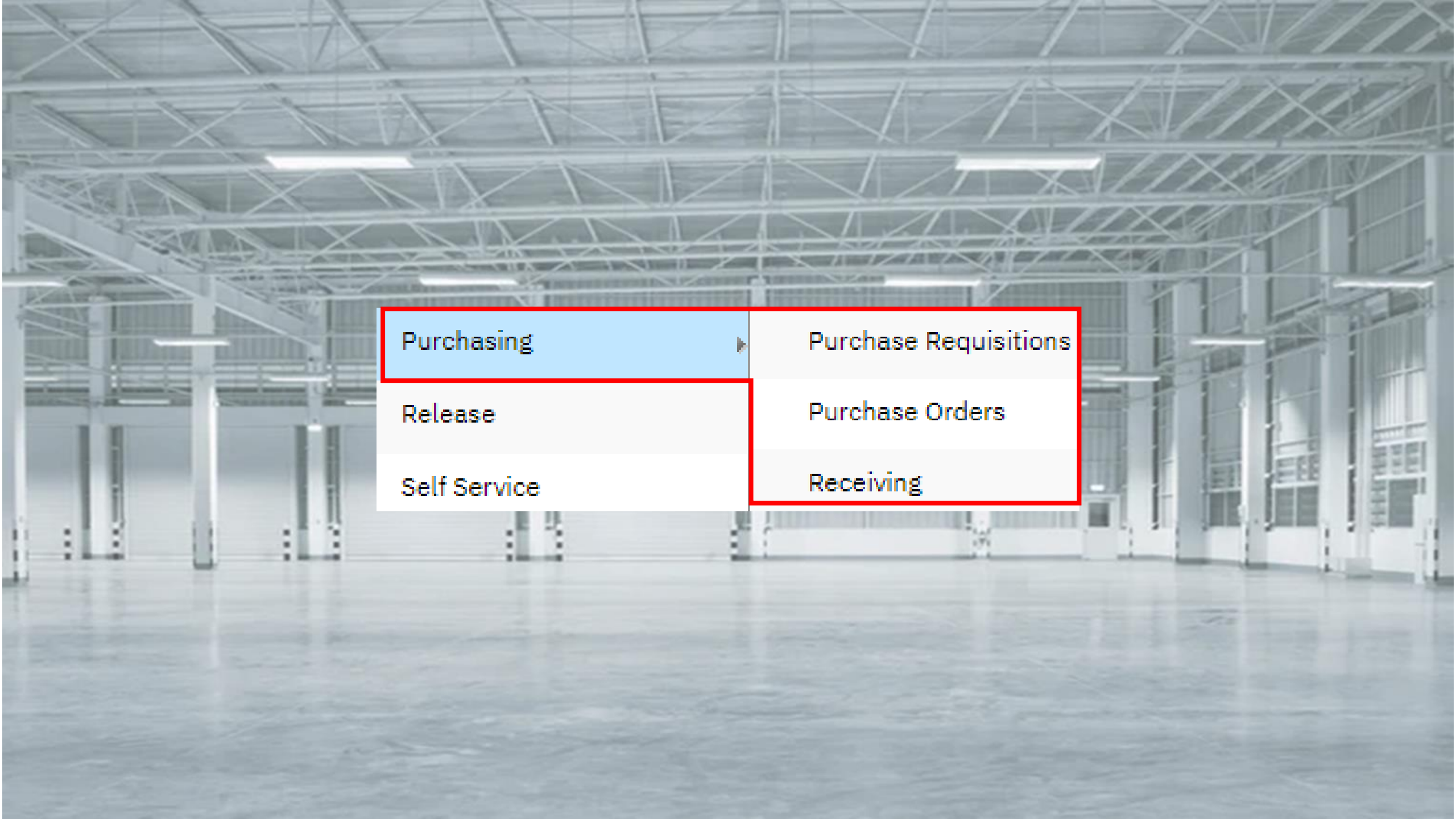
ABC Analysis 

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	Purchase Requisitions
Release	Purchase Orders
Self Service	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

Task	Item	Description	Transaction Type	Storeroom	Quantity	Bin
>	001582	BEARING,BALL:ANGULAR CONTACT,SIM	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 SP	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: Lot:

Item: 001582 > BEARING,BALL:ANGULAR CONTACT,SINGLE ROW,75MM ID,160

Line Type: Item Expiration Date:

Storeroom: SOUTHCOBB Lot Type: NOLOT

Site: WATER Condition Code:

Quantity: 2.00 Rate Percentage: 100

Unit Cost: 358.68 Condition Enabled?

Line Cost: 717.36 Stock Category: STK

Bin: LSR-H-1-E-2-A Entered By: RICHAFO31804

Actual Date: 4/3/23 8:04 AM

Charge Information

Requisition: GL Debit Account: 500-500-5240-

Requisition Line: GL Credit Account: 500-500-5220-

Location: SSWRFSC4005 > PUMP ASSEMBLY, RAS, 8.0, SCWRF, SECONDTREAT, SC-P4248 Transaction Type: ISSUE

Asset: SSWRFSC400 > MOTOR, RASPUMP8, SCWRF, SECONDTREAT, INVERTER DUTY M Outside?

Rotating Asset: Issued To: GILLCR0327! >

Scrap:

- ❖ 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

Task	Item	Description	Transaction Type	Storeroom	Quantity	Bin
>	001582	BEARING,BALL:ANGULAR CONTACT,SIM	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 SF	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: RICHAFO31804

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: SSWRFSC40060 > 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

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, SOLIDSSEWATER	SSWRFNWDBSF	OPERATING	003887		WATER	16068701
1311074	PUMP LOBE, SLUDGE, #04, NWWRF, SOLIDSSEWATER	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!

A man in a pilot's uniform, including a blue cap and sunglasses, is smiling broadly. He is wearing a black leather jacket over a light-colored collared shirt. The background is a large, empty industrial hangar with a high ceiling and structural beams.

**"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

Search Edit

Item
=

Description
=

Status
= ACTIVE ▼

Type
= ITEM ▼

and

Storeroom
= ,NOONDAY ▼

Default Bin
=

Catalog Code
=

Model Number
=

Vendor
=

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

❖ **SCANNING BARCODES FOR
THE ITEM NUMBER**

Search Edit

Item
=

Description
=

Status
= ACTIVE ▼

Type
= ITEM ▼

and
Storeroom
= ,NOONDAY ▼


Default Bin
=

Catalog Code
=


Model Number
=

Vendor
=

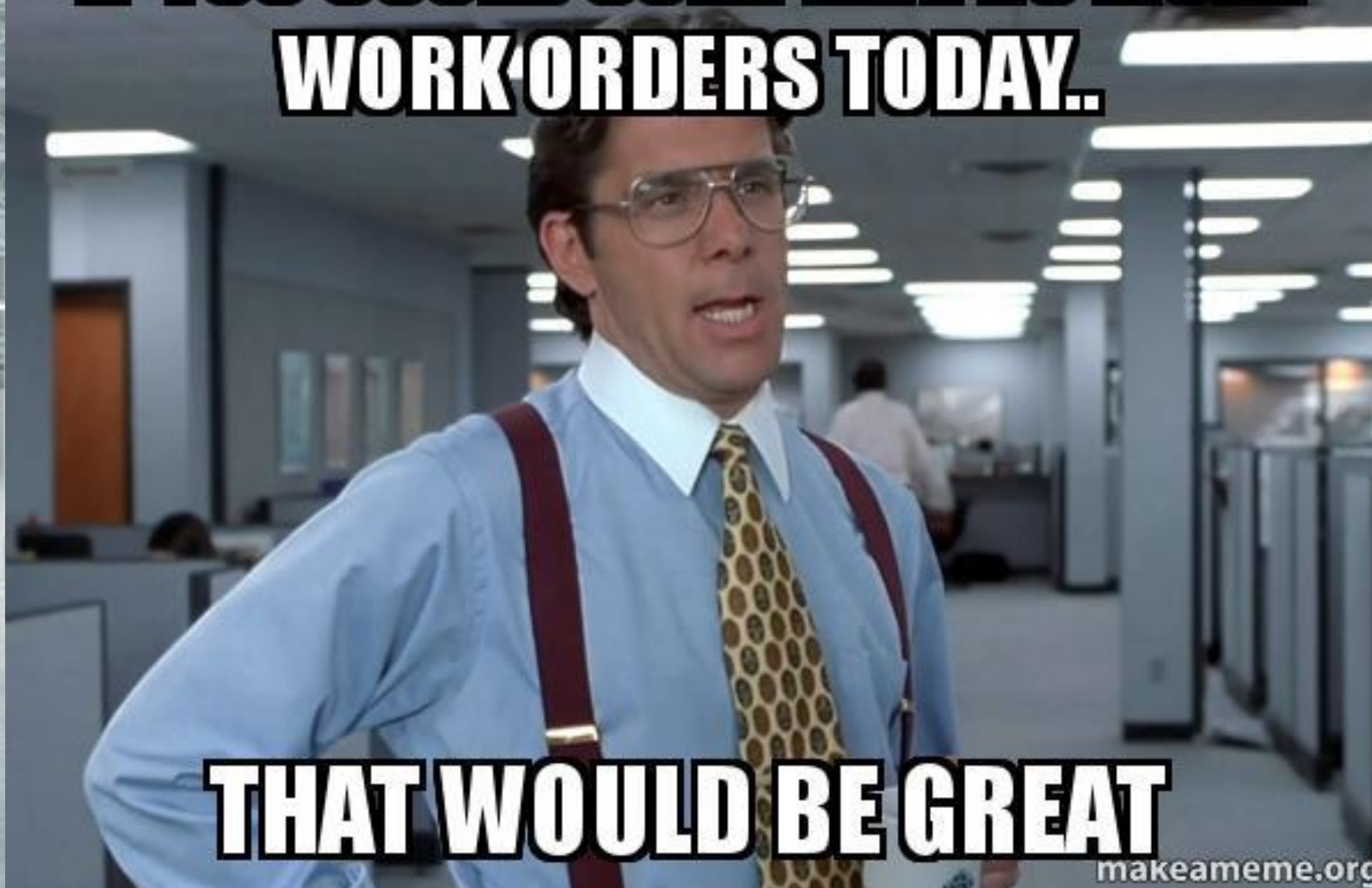
ABILITY TO MOVE INVENTORY TO OTHER LOCATIONS, WORK ORDERS, OR JUST CHECK THE BALANCE

 / [Inventory Search](#) / [More](#) ▾

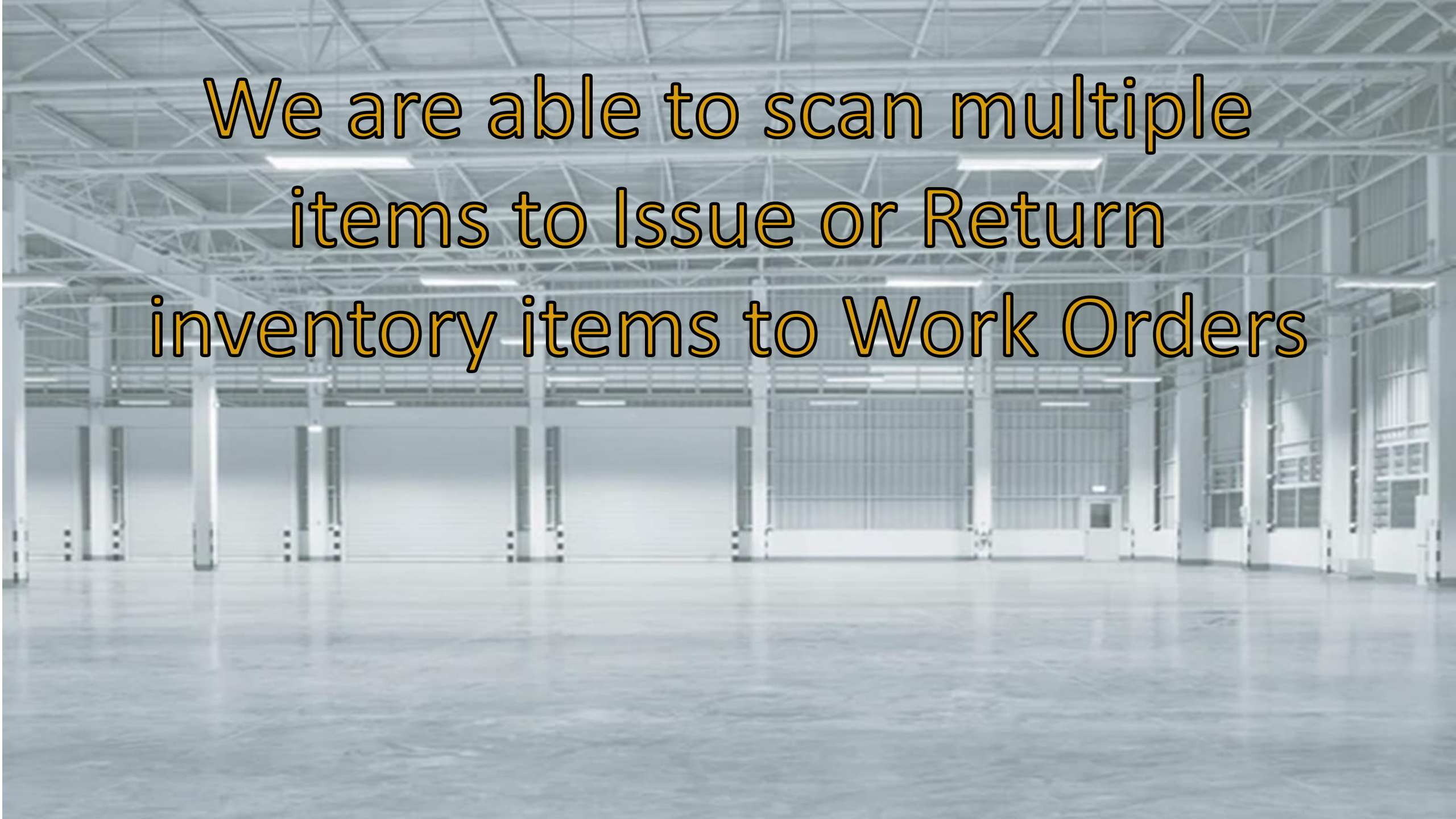
[Issue/Return](#) [Transfer](#) [Connect](#) [Xmit](#)

Item	Description	Type	Storeroom	Issue Unit	Min Level	Max Level	Status
 001307	BEARING,BALL:ANGULAR CONTACT,DBL ROW,0.2756" ID,0.9375" OD,...	ITEM	NOONDAY	EA	0.00	0.00	ACTIVE

**IF YOU COULD COMPLETE 20 MORE
WORK ORDERS TODAY..**



THAT WOULD BE GREAT

A large, empty industrial warehouse with a high ceiling and concrete floor. The ceiling features a complex network of white steel trusses and several long, rectangular fluorescent light fixtures. The floor is a smooth, light-colored concrete that reflects the overhead lights. In the background, there are several large, white roll-up doors and a few smaller windows. The overall atmosphere is clean and spacious.

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

[New Issue](#)

[New Return](#)

[Xmit](#)

Issues and Returns

OK ✓

Work Order



Issue To



Storeroom



Issue Type



← Search

✎ Edit



Display Name

=

Person

=

Department

=

Default Site

=

WATER



and

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
------	-------------	----------	-----------	------------	-----------	-----	----------------	------------	-----------	------------	------------------

[← 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



HAPPY COUNT DAY!

Inventory

Inventory Search

Issues and Returns

Cycle Count

Discrepancy Report

Inventory Usage



Item	New Count	Bin	Description	Issue Unit	Last Counted	Reconciled	ABC Type	Storeroom
------	-----------	-----	-------------	------------	--------------	------------	----------	-----------

Search [Edit] [Search]

Item =

Bin =

ABC Type =

Count By <= 05/05/2023 [Calendar]

Storeroom = ,NOONDAY

Bin Ascending

Item Ascending

← Search Edit 🔍

Item
=

Bin
=

and




ABC Type
= ▼

Count By
<= 📅

Storeroom
= ▼

Bin ▼ Ascending


Item ▼ Ascending


 Search  Edit 


Item
=


Bin
=


and

ABC Type
= 

Count By
<= 

Storeroom
= 

Bin  Ascending

Item  Ascending



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	<input checked="" type="checkbox"/>	B	NOONDAY
	004725		END-A-2-C-1	VALVE,SOLENOID:1/2" PIPE,5/8" ORIFICE,12...	EA	11/23/2021 1:41 PM	<input checked="" type="checkbox"/>	B	NOONDAY
	002364		END-A-2-C-3	VALVE,SOLENOID:3/8" PIPE,5/8" ORIFICE,11...	EA	11/23/2021 1:42 PM	<input checked="" type="checkbox"/>	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	<input checked="" type="checkbox"/>	B	NOONDAY
	007839		END-A-2-D-4-A	SWITCH,LIMIT:10A @ 600V,DPDT,PLUNGER,...	EA	11/23/2021 1:47 PM	<input checked="" type="checkbox"/>	B	NOONDAY



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	<input checked="" type="checkbox"/>	B	NOONDAY
	004725		END-A-2-C-1	VALVE,SOLENOID:1/2" PIPE,5/8" ORIFICE,12...	EA	11/23/2021 1:41 PM	<input checked="" type="checkbox"/>	B	NOONDAY
	002364		END-A-2-C-3	VALVE,SOLENOID:3/8" PIPE,5/8" ORIFICE,11...	EA	11/23/2021 1:42 PM	<input checked="" type="checkbox"/>	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	<input checked="" type="checkbox"/>	B	NOONDAY
	007839		END-A-2-D-4-A	SWITCH,LIMIT:10A @ 600V,DPDT,PLUNGER,...	EA	11/23/2021 1:47 PM	<input checked="" type="checkbox"/>	B	NOONDAY



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

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	<input type="checkbox"/>	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	<input checked="" type="checkbox"/>	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	<input checked="" type="checkbox"/>	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	<input checked="" type="checkbox"/>	B	NOONDAY
007839		END-A-2-D-4-A	SWITCH,LIMIT:10A @ 600V,DPDT,PLUNGER,...	EA	11/23/2021 1:47 PM	<input checked="" type="checkbox"/>	B	NOONDAY

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	<input type="checkbox"/>	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	<input checked="" type="checkbox"/>	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	<input checked="" type="checkbox"/>	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	<input type="checkbox"/>	B	NOONDAY
007839	0.00	END-A-2-D-4-A	SWITCH,LIMIT:10A @ 600V,DPDT,PLUNGER,...	EA	05/05/2023 7:17 AM	<input type="checkbox"/>	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	<input type="checkbox"/>	B	NOONDAY
007839	1.00	END-A-3-D-4	SWITCH,LIMIT:10A @ 600V,DPDT,PLUNGER,...	EA	05/05/2023 7:17 AM	<input type="checkbox"/>	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	<input type="checkbox"/>	B	NOONDAY
007843	1.00	END-A-4-E-1	SWITCH,LIMIT:15A @ 480VAC, 0.02A @ 250V...	EA	05/05/2023 7:17 AM	<input checked="" type="checkbox"/>	B	NOONDAY
004772	1.00	END-A-4-E-2	CONTACT:REPLACEMENT KIT,3A,600V,NEM...	EA	05/05/2023 7:17 AM	<input type="checkbox"/>	B	NOONDAY
002809	1.00	END-A-7-B-1	KIT,CONTACT	EA	05/05/2023 7:17 AM	<input type="checkbox"/>	B	NOONDAY
007839	1.00	END-A-7-C-4-A	SWITCH,LIMIT:10A @ 600V,DPDT,PLUNGER,...	EA	05/05/2023 7:17 AM	<input type="checkbox"/>	B	NOONDAY
007777	1.00	END-A-7-D-5	CONTROLLER:HACH SC200,-20 - 60 DEG C,...	EA	05/05/2023 7:17 AM	<input type="checkbox"/>	A	NOONDAY



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	<input type="checkbox"/>	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	<input checked="" type="checkbox"/>	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	<input checked="" type="checkbox"/>	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	<input type="checkbox"/>	B	NOONDAY
	007839	0.00	END-A-2-D-4-A	SWITCH,LIMIT:10A @ 600V,DPDT,PLUNGER,...	EA	05/05/2023 7:17 AM	<input type="checkbox"/>	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	<input type="checkbox"/>	B	NOONDAY
	007839	1.00	END-A-3-D-4	SWITCH,LIMIT:10A @ 600V,DPDT,PLUNGER,...	EA	05/05/2023 7:17 AM	<input type="checkbox"/>	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	<input type="checkbox"/>	B	NOONDAY
	007843	1.00	END-A-4-E-1	SWITCH,LIMIT:15A @ 480VAC, 0.02A @ 250V...	EA	05/05/2023 7:17 AM	<input checked="" type="checkbox"/>	B	NOONDAY
	004772	1.00	END-A-4-E-2	CONTACT:REPLACEMENT KIT,3A,600V,NEM...	EA	05/05/2023 7:17 AM	<input type="checkbox"/>	B	NOONDAY
	002809	1.00	END-A-7-B-1	KIT,CONTACT	EA	05/05/2023 7:17 AM	<input type="checkbox"/>	B	NOONDAY
	007839	1.00	END-A-7-C-4-A	SWITCH,LIMIT:10A @ 600V,DPDT,PLUNGER,...	EA	05/05/2023 7:17 AM	<input type="checkbox"/>	B	NOONDAY
	007777	1.00	END-A-7-D-5	CONTROLLER:HACH SC200,-20 - 60 DEG C,...	EA	05/05/2023 7:17 AM	<input type="checkbox"/>	A	NOONDAY



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	<input type="checkbox"/>	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	<input checked="" type="checkbox"/>	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	<input checked="" type="checkbox"/>	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	<input type="checkbox"/>	B	NOONDAY
	007839	0.00	END-A-2-D-4-A	SWITCH,LIMIT:10A @ 600V,DPDT,PLUNGER,...	EA	05/05/2023 7:17 AM	<input type="checkbox"/>	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	<input type="checkbox"/>	B	NOONDAY
	007839	1.00	END-A-3-D-4	SWITCH,LIMIT:10A @ 600V,DPDT,PLUNGER,...	EA	05/05/2023 7:17 AM	<input type="checkbox"/>	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	<input type="checkbox"/>	B	NOONDAY
	007843	1.00	END-A-4-E-1	SWITCH,LIMIT:15A @ 480VAC, 0.02A @ 250V...	EA	05/05/2023 7:17 AM	<input checked="" type="checkbox"/>	B	NOONDAY
	004772	1.00	END-A-4-E-2	CONTACT:REPLACEMENT KIT,3A,600V,NEM...	EA	05/05/2023 7:17 AM	<input type="checkbox"/>	B	NOONDAY
	002809	1.00	END-A-7-B-1	KIT,CONTACT	EA	05/05/2023 7:17 AM	<input type="checkbox"/>	B	NOONDAY
	007839	1.00	END-A-7-C-4-A	SWITCH,LIMIT:10A @ 600V,DPDT,PLUNGER,...	EA	05/05/2023 7:17 AM	<input type="checkbox"/>	B	NOONDAY
	007777	1.00	END-A-7-D-5	CONTROLLER:HACH SC200,-20 - 60 DEG C,...	EA	05/05/2023 7:17 AM	<input type="checkbox"/>	A	NOONDAY



DISCREPANCY

**DISCREPANCY
EVERYWHERE**

Inventory

Inventory Search

Issues and Returns




Cycle Count

Discrepancy Report

Inventory Usage

Xmit

Item	New Count	Bin	Description	Physical Count	Issue Unit	Last Counted	Reconciled	ABC Type	Storeroom
------	-----------	-----	-------------	----------------	------------	--------------	------------	----------	-----------

 Search  Edit 

Bin
=

and

Reconciled
=

Storeroom
=

Bin Ascending

Item Ascending

← Search

✎ Edit



Bin

=

Reconciled

=

Storeroom

=

 ▼

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	<input type="checkbox"/>	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	<input type="checkbox"/>	B	NOONDAY
	007839		END-A-2-...	SWITCH,LIMIT:10A @ 600V,DPDT,PLUNGER,...	0.00	EA	05/05/2023 7:17 AM	<input type="checkbox"/>	B	NOONDAY
	006911		END-A-3-...	SLEEVE:SPROCKET AND GEAR,8-3/16" OD,...	12.00	EA	05/05/2023 7:17 AM	<input type="checkbox"/>	B	NOONDAY
	007839		END-A-3-...	SWITCH,LIMIT:10A @ 600V,DPDT,PLUNGER,...	1.00	EA	05/05/2023 7:17 AM	<input type="checkbox"/>	B	NOONDAY
	007844		END-A-3-...	FILTER:GENERAL PURPOSE,9.80" HT X 4.8" ...	2.00	EA	05/05/2023 7:17 AM	<input type="checkbox"/>	B	NOONDAY
	004772		END-A-4-...	CONTACT:REPLACEMENT KIT,3A,600V,NEM...	1.00	EA	05/05/2023 7:17 AM	<input type="checkbox"/>	B	NOONDAY
	002809		END-A-7-...	KIT,CONTACT	1.00	EA	05/05/2023 7:17 AM	<input type="checkbox"/>	B	NOONDAY
	007839		END-A-7-...	SWITCH,LIMIT:10A @ 600V,DPDT,PLUNGER,...	1.00	EA	05/05/2023 7:17 AM	<input type="checkbox"/>	B	NOONDAY
	007777		END-A-7-...	CONTROLLER:HACH SC200,-20 - 60 DEG C,...	1.00	EA	05/05/2023 7:17 AM	<input type="checkbox"/>	A	NOONDAY

YOU GET AN ORDER



YOU GET AN ORDER

Purchasing

PR Search

PO Search



PR	Description	Status	Total Cost	Vendor	Vendor Name	Requested By	Requested Date	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...	



Lines
Vendor

PR	Description	Status	Total Cost	Vendor	Vendor Name	Requested By	Requested Date	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



Lines

Vendor

	^ PR	Description	Status	Total Cost	Vendor	Vendor Name	Requested By	Requested Date	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...	



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



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



Xmit

Material Receipts

	Purchase Order	Description	Waiting Inspection	Receipts	Vendor	Rev
	007213	Parts for st...	APPR	PARTIAL	65860	0
	386214	Siemens p...	APPR	PARTIAL	65860	0



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 Required
	<input type="checkbox"/>	1	001106	PLC:12 CONNECTION...			2.00			0.00	EA		TSG1	11A	6ES7153-2...		5916		<input type="checkbox"/>
	<input type="checkbox"/>	2	001108	PLC:DP,PROFIBUS,E...			1.00			0.00	EA		TSG1	11D	6ES7195-7...		5916		<input type="checkbox"/>








← PO Search / Material Receipts ▾

Xmit

	Complete	^ Line Number	Item	Description	Status	Quantity	Order Quantity	Received Quantity
	<input type="checkbox"/>	1	001106	PLC:12 CONNECTION...		1.00	2.00	
	<input type="checkbox"/>	2	001108	PLC:DP,PROFIBUS,E...	COMP	1.00	1.00	



Xmit

	Complete	^ Line Number	Item	Description	Status	Quantity	Order Q			
	<input type="checkbox"/>	1	001106	PLC:12 CONNECTION...		3 	2.00	0.00	EA	TSG1
	<input type="checkbox"/>	2	001108	PLC:DP,PROFIBUS,E...	COMP	1.00	1.00	0.00	EA	TSG1

✕ Cancel **OK ✓**

A quantity of 3 is being received against PO Line 1, which exceeds the ordered quantity of 2



← PO Search / Material Receipts ▾

Xmit

	Complete	^ Line Number	Item	Description	Status	Quantity	Order Qu
	<input type="checkbox"/>	1	001106	PLC:12 CONNECTION...	COMP	3.00	2.00
	<input type="checkbox"/>	2	001108	PLC:DP,PROFIBUS,E...	COMP	1.00	1.00

QUESTION:

DO YOU HAVE ANY QUESTIONS?

imgflip.com



Cobb County...Expect the Best!



THANK YOU

Cobb County...Expect the Best!

IBM Maximo Application Suite Overview

Manage Roadmap



IBM

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



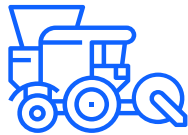
Maintenance strategies differ by asset class

Asset Management Strategy and Maturity Model: Asset utilization and availability

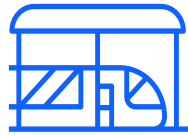
The asset strategy and maturity changes depending on factors including asset/replacement cost, criticality of asset, usage patterns and impact of failure on safety, environment, operations, financial and public image.



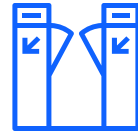
Reactive



Run-to-failure



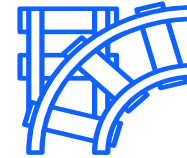
Calendar based



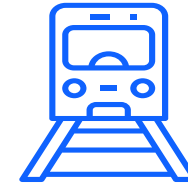
Usage based



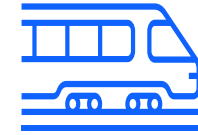
Condition based



Risk-base maintenance



Predictive



Financially optimized

Risk Mitigation

Financial Optimization

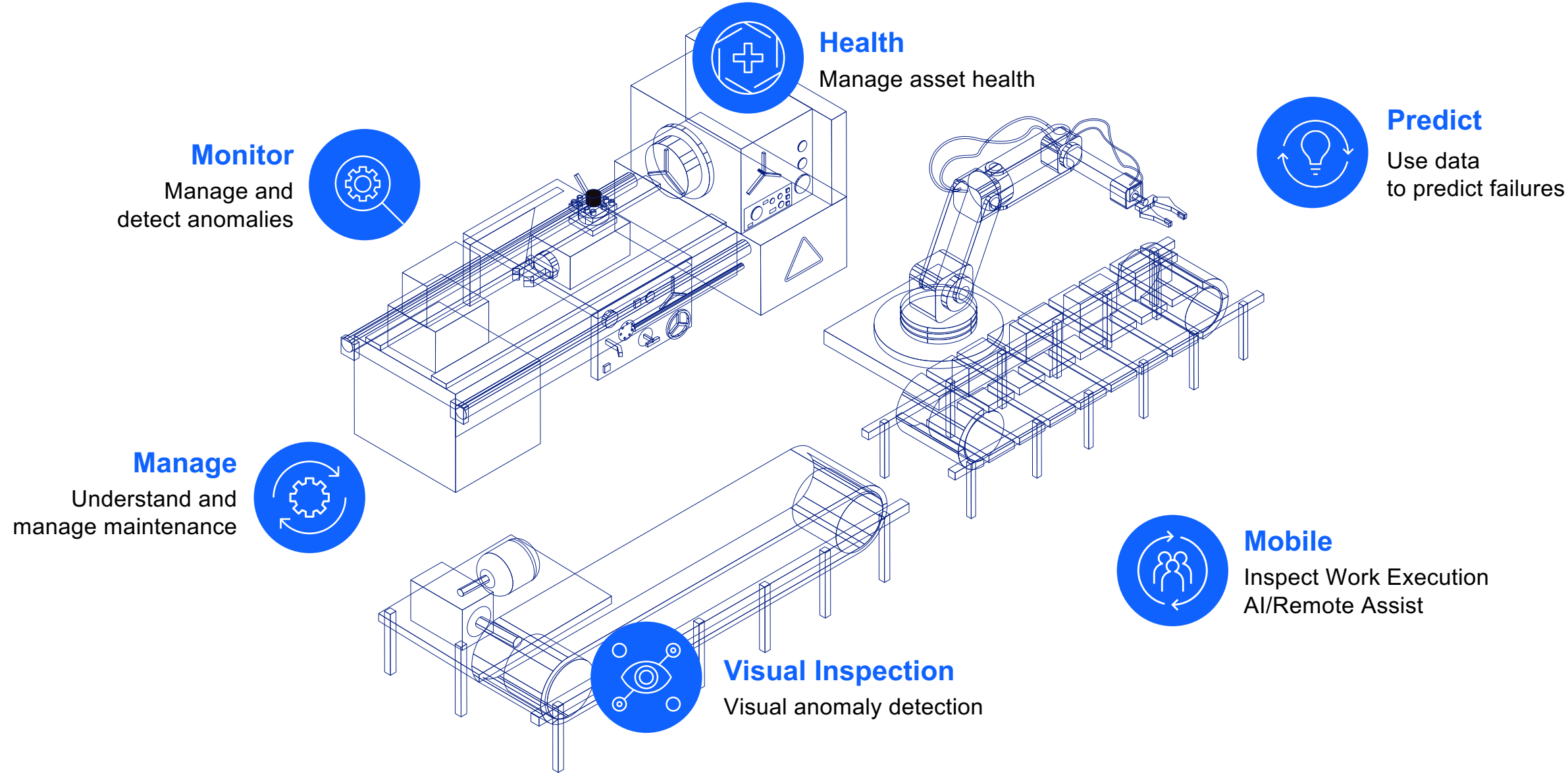
Data driven decisions (analytics)

Asset value and business impact

Maintenance is an expense

Maintenance is an investment

Driving the Automation Journey



Monitor

Manage and detect anomalies



Health

Manage asset health



Predict

Use data to predict failures



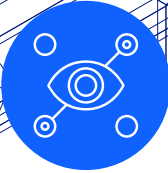
Manage

Understand and manage maintenance



Visual Inspection

Visual anomaly detection



Mobile

Inspect Work Execution
AI/Remote Assist



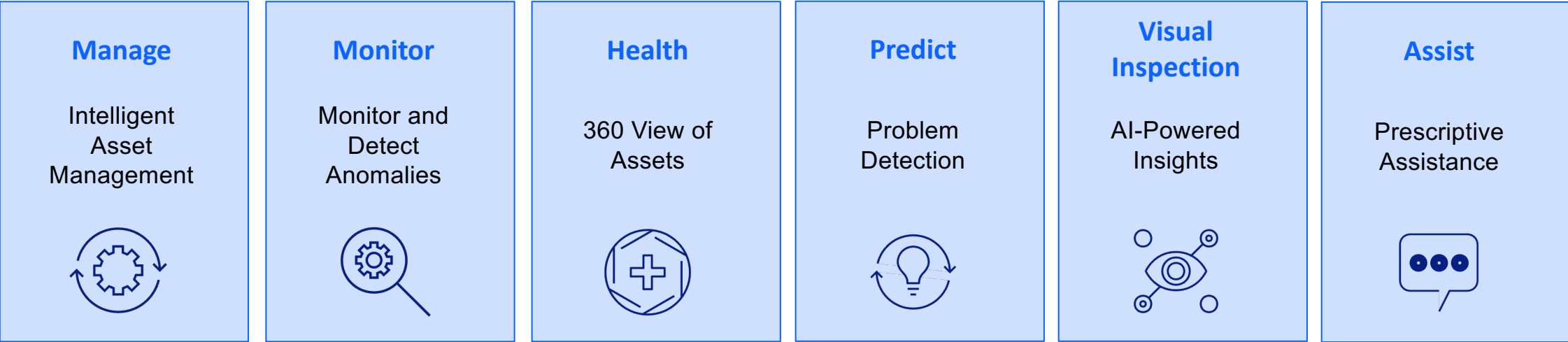
Maximo Application Suite

Accelerate your transformation journey while lowering total cost of ownership

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

Maximo Application Suite

Best of class capabilities to provide complete view of your assets



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

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



Maximo Application Suite Deployment Options

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

Maximo Application Suite Catalog

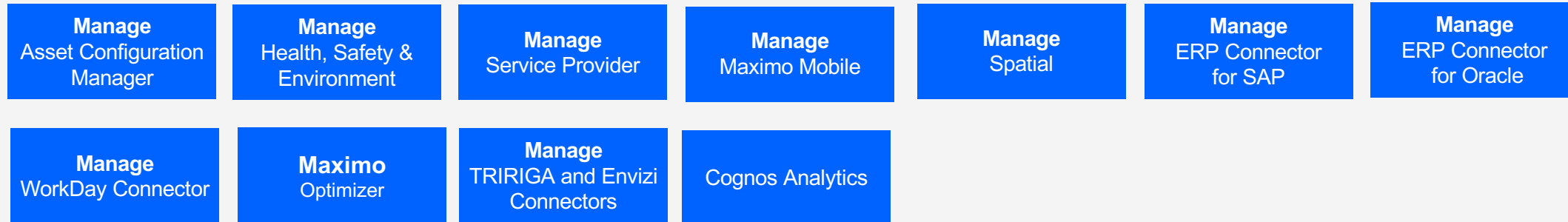
MAS Applications



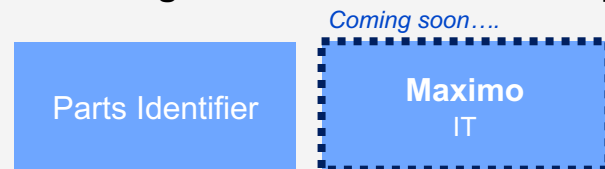
MAS Industry Solutions



MAS Add-on Solutions



MAS Integrations and Add-ons – separate part purchase



Simplified Licensing and Usage

MAS AppPoints will be used across suite

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

1. Single license

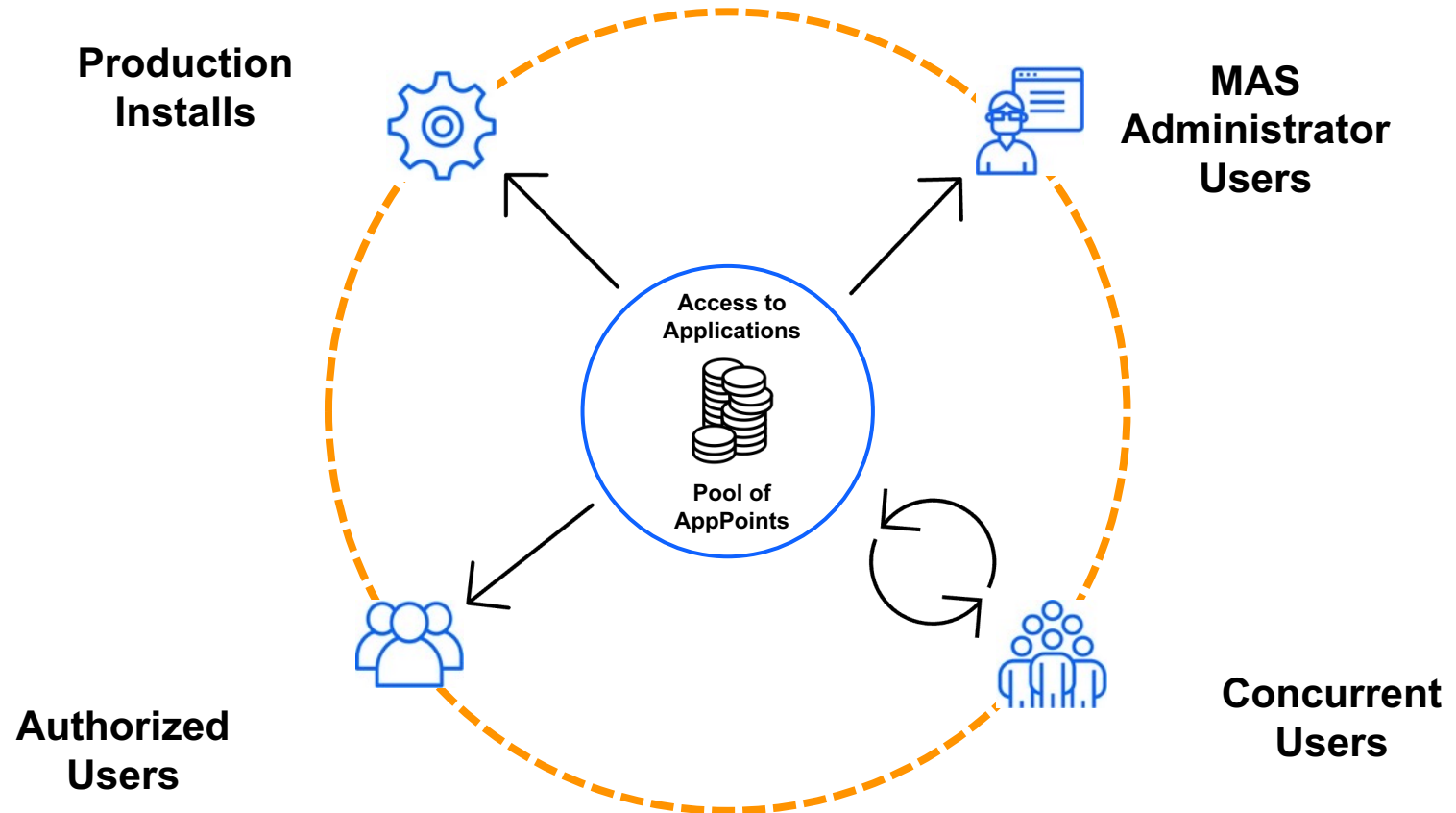
One entitlement to entire Suite

2. Flexible consumption

Sharing of license through concurrent users

3. Simplified usage

Access applications without additional provisioning



MAS LICENSE MODEL

- 4 User types
- Authorized & Concurrent
- Install based

Self Service User

Free
0 AppPoints

Self Service Applications

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

Limited User

Concurrent 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







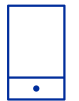


Expand the user experience aligning asset management roles with AI enhanced processes for managers, schedulers, dispatchers and mobile users.



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

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

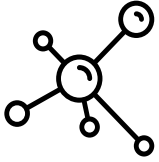
Intelligent Enterprise Asset Management solution to help organizations:

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

Personas

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

Deliver AI driven asset performance @ Scale



Monitor

Monitoring with AI-based Anomaly Detection at Enterprise-Scale

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



Health

Reduce fleetwide operational risk by focusing on the right assets

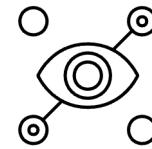
- Consolidated global view of assets
- Flexible health scoring by asset type or groups
- Refurbish vs Replacement Planning
- Reduce unnecessary preventive maintenance



Predict

Identify asset failure and improve maintenance practices and reliability

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



Visual Inspection

Unleash the power of computer vision for inspection automation

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

MAS/Manage Roadmap – 2023

IBM Continuous Delivery model

MAS 8.8/8.9 2022

Inventory Count Books
Spatial - Indoor Mapping

Role Based Apps

- Scheduling Dashboard
- Operational Dashboard

MAF Configuration

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

Manage Mobile Apps

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

Serviceability /Security/Currency

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

Civil Infrastructure enhancements

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

MAS 8.10 Mar. 2023

Role Based Apps

- Scheduler Dashboard enhancements
- Dispatching Dashboard
- Operational Dashboard enhancements

MAF Configuration

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

Manage Mobile Apps

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

Serviceability /Security/Currency

- Operator maturity model enhancements

Reporting

- Cognos 11.2

IS enhancements

- RBA and mobile apps
- Civil Infrastructure enhancements

MAS 8.y Q3 2023

Role Based Apps

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

MAF Configuration

- Drag & drop configuration

Manage Mobile Apps

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

Serviceability /Security/Currency

- Operator maturity model enhancements

Reporting

- Cognos enhancements

IS enhancements

- RBA and mobile apps
- Civil Infrastructure enhancements

MAS 8.z Q1 2024

Role Based Apps

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

MAF Configuration

- Tool Palette
- DataSource Assignment
- Data Dictionary Searching

Manage Mobile Apps

- Current Mobile App enhancements
- Desktop Requisition

Serviceability /Security/Currency

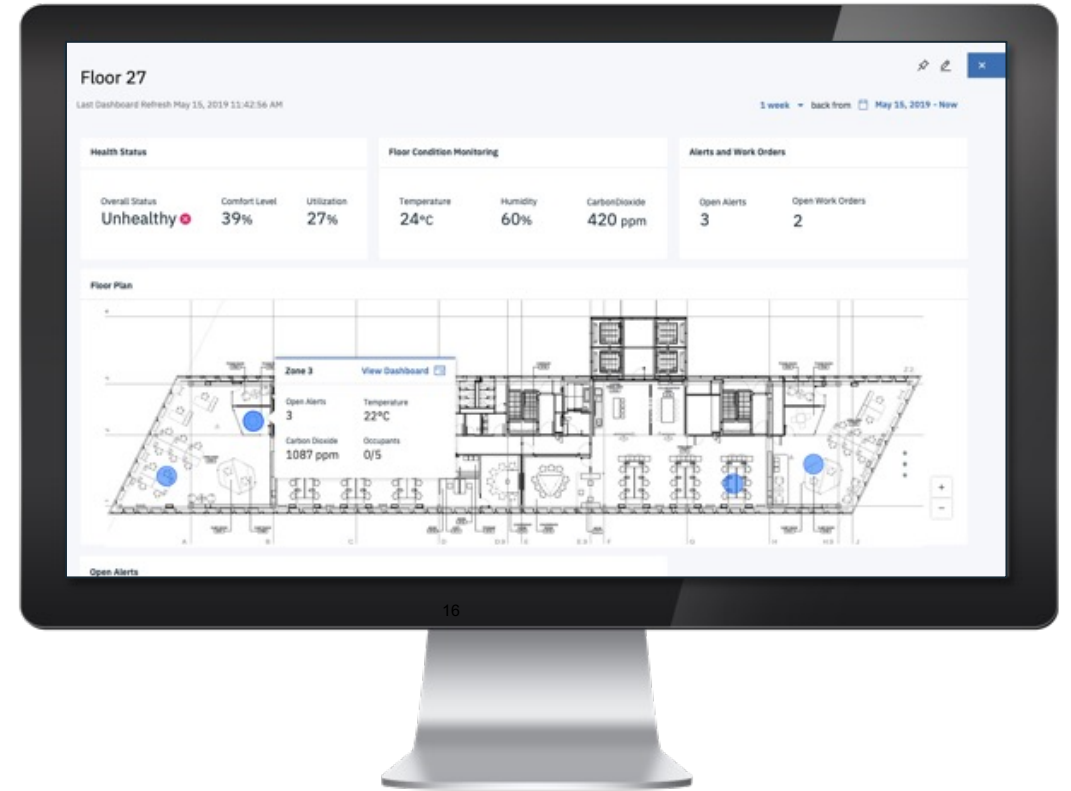
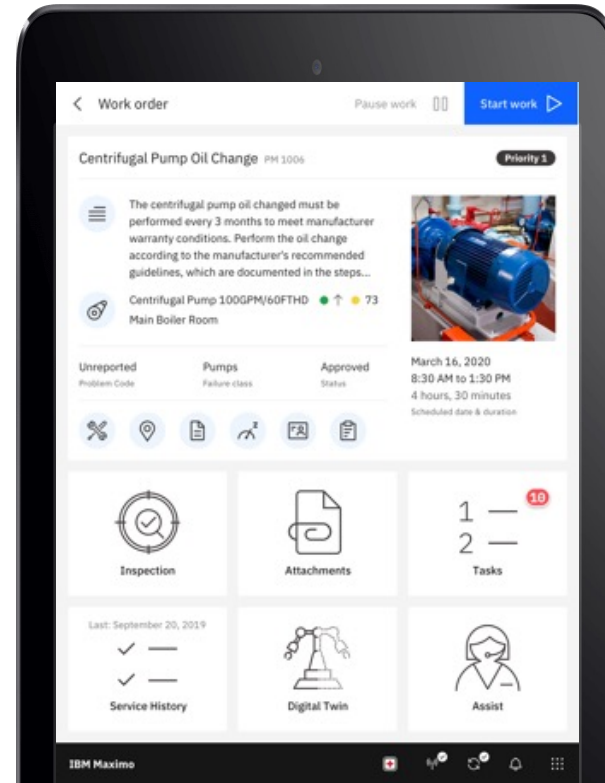
- Operator maturity model enhancements

IS enhancements

- RBA and mobile apps
- Civil Infrastructure enhancements

Modernized User Interface

Easy navigation, common controls and visualization



Updated Look and Feel

- *Maximo Application Suite Manage*

Updated Search Navigation

Collapsed Left side Navigation allows more screen real estate

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

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

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

The screenshot displays the 'Work Order Tracking' interface in the Maximo Application Suite. The main content area shows a work order for 'Relocate Guard Rails Around Compressor' at the 'BEDFORD' site. An 'Asset Details' modal window is open, providing a table of asset information:

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

The interface also features a left-hand navigation sidebar with 'Common Actions' such as 'New Work Order', 'Save Work Order', 'Clear Changes', 'Change Status', 'Select Owner', 'Take Ownership', 'Approve Work Order', 'Initiate Work Order', 'Complete Work Order', 'Close Work Order', and 'Create Report'. The right-hand panel includes 'Attachments' and 'Status' information, with 'Toggles instead of checkboxes' highlighted for 'Inherit Status Changes?' and 'Accepts Charges?'.

Reporting Updates

BIRT

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

Cognos

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



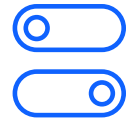
Provide analytic information to meet strategic and operational needs of our customers



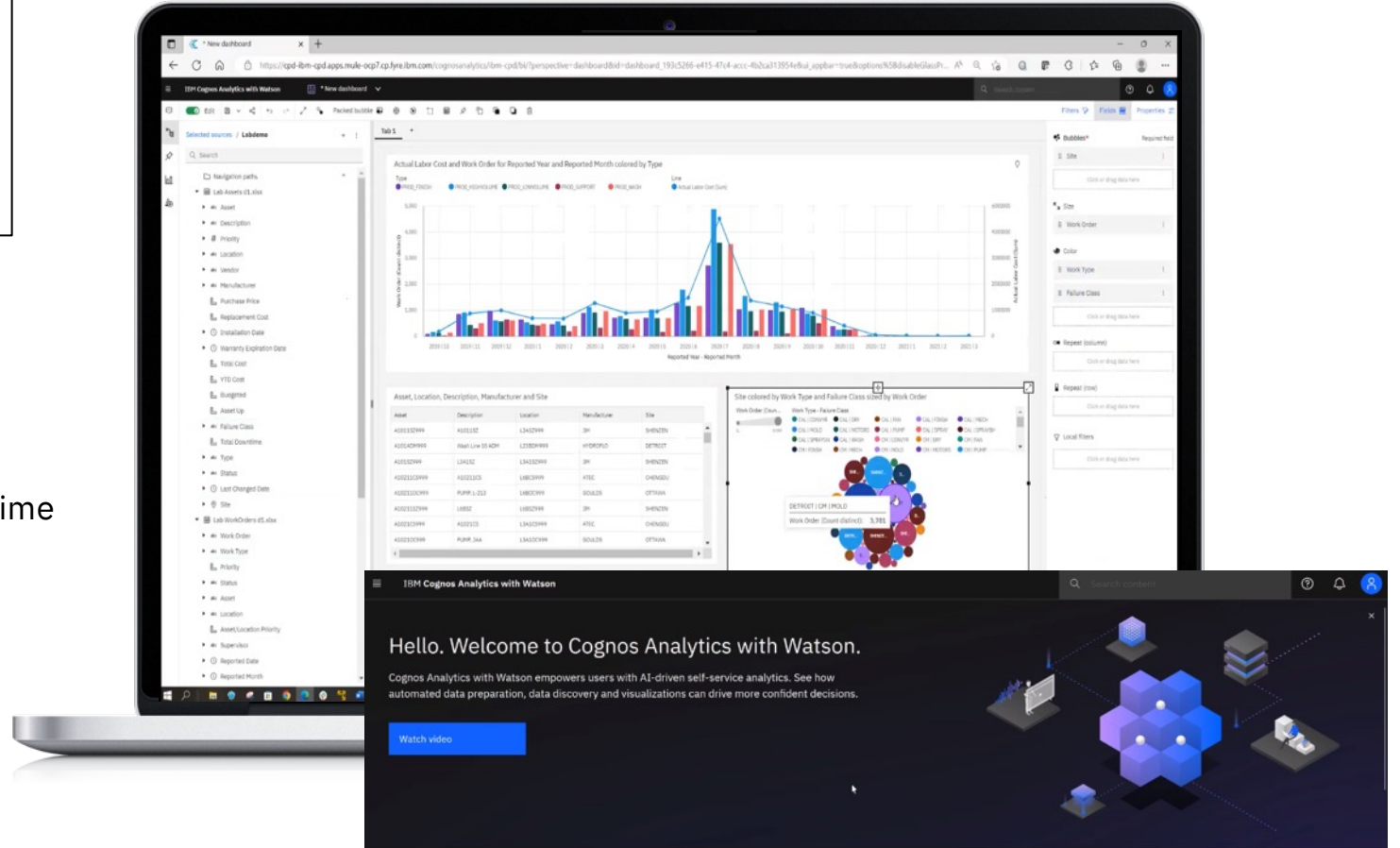
Display information quickly and in real-time



Deliver critical metric to drill down into actionable items



Make content customizable



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Quick launch

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

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

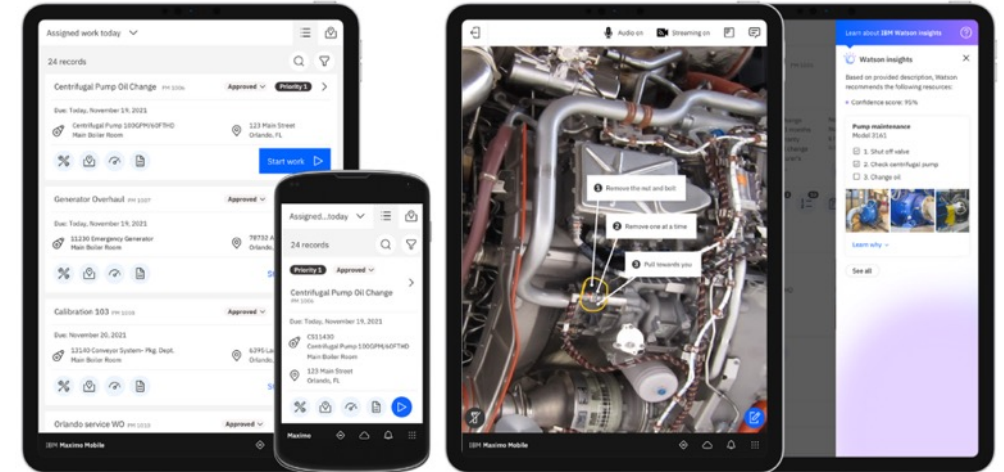
Exploration
Quickly find unbiased answers by identifying trends in your data with data exploration.

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

Modernized experiences to support the new workforce

New Maximo Application Framework

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



Goals include Improved:

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

Role Based Applications

Next Generation User Experience

Available



Actionable Dashboards to improve efficiencies



Intelligent workflows



Configurability

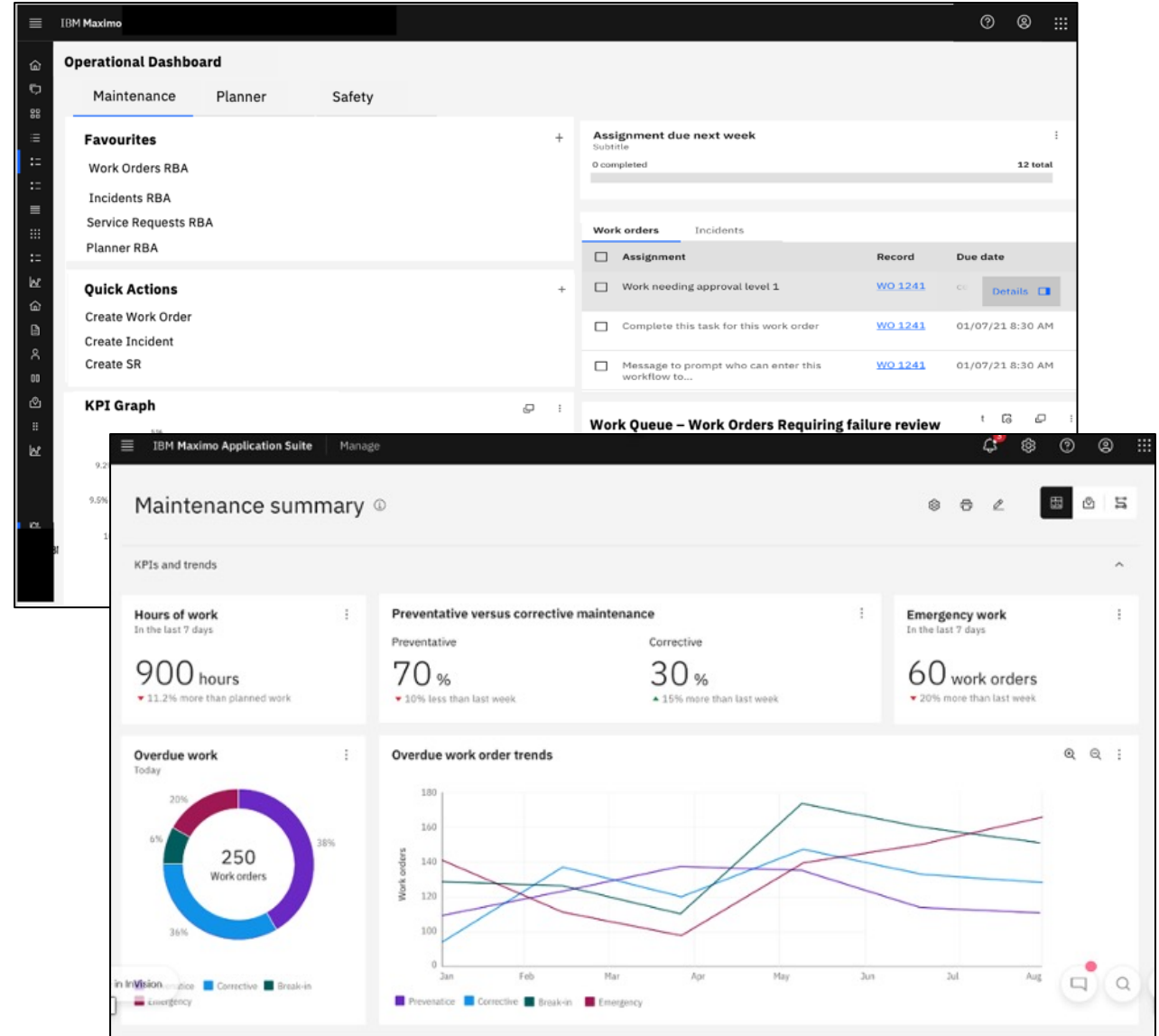


Built on Maximo Application Framework



Connected

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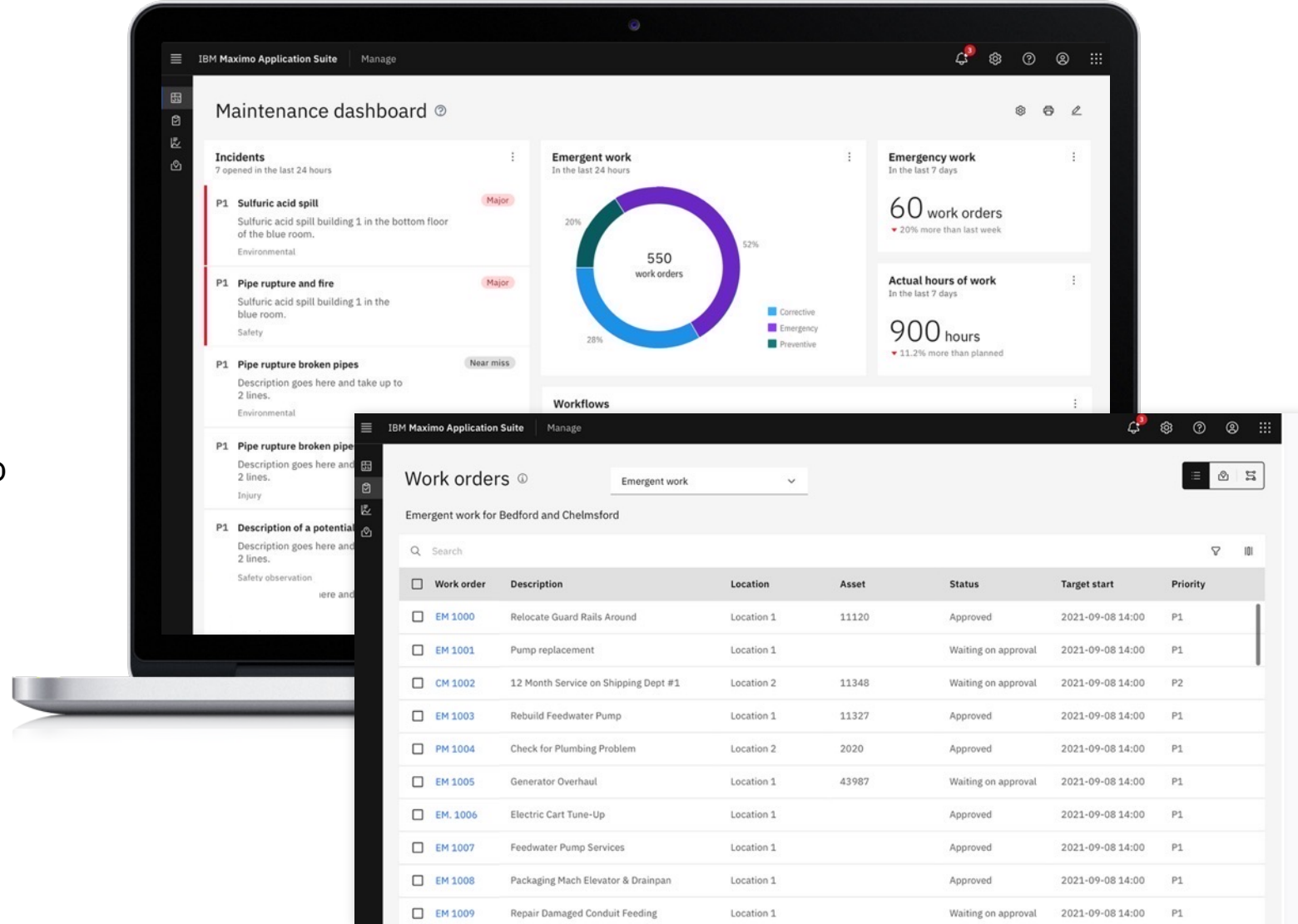
Operational Dashboard

- *Role Based Application*

Available

Overview dashboard and basic navigation

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



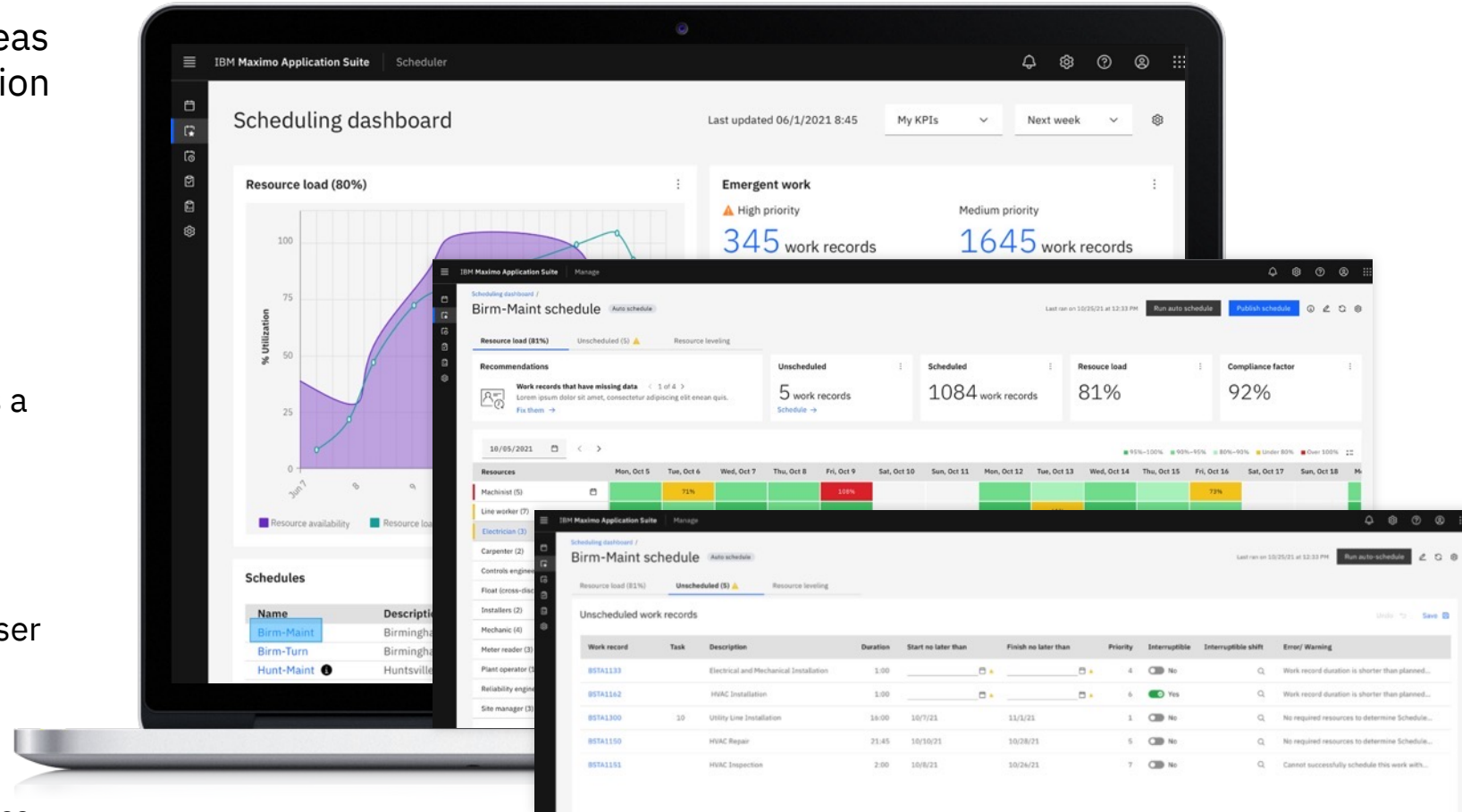
Scheduling Dashboard

Role Based Application

Available

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

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



Dispatching Dashboard

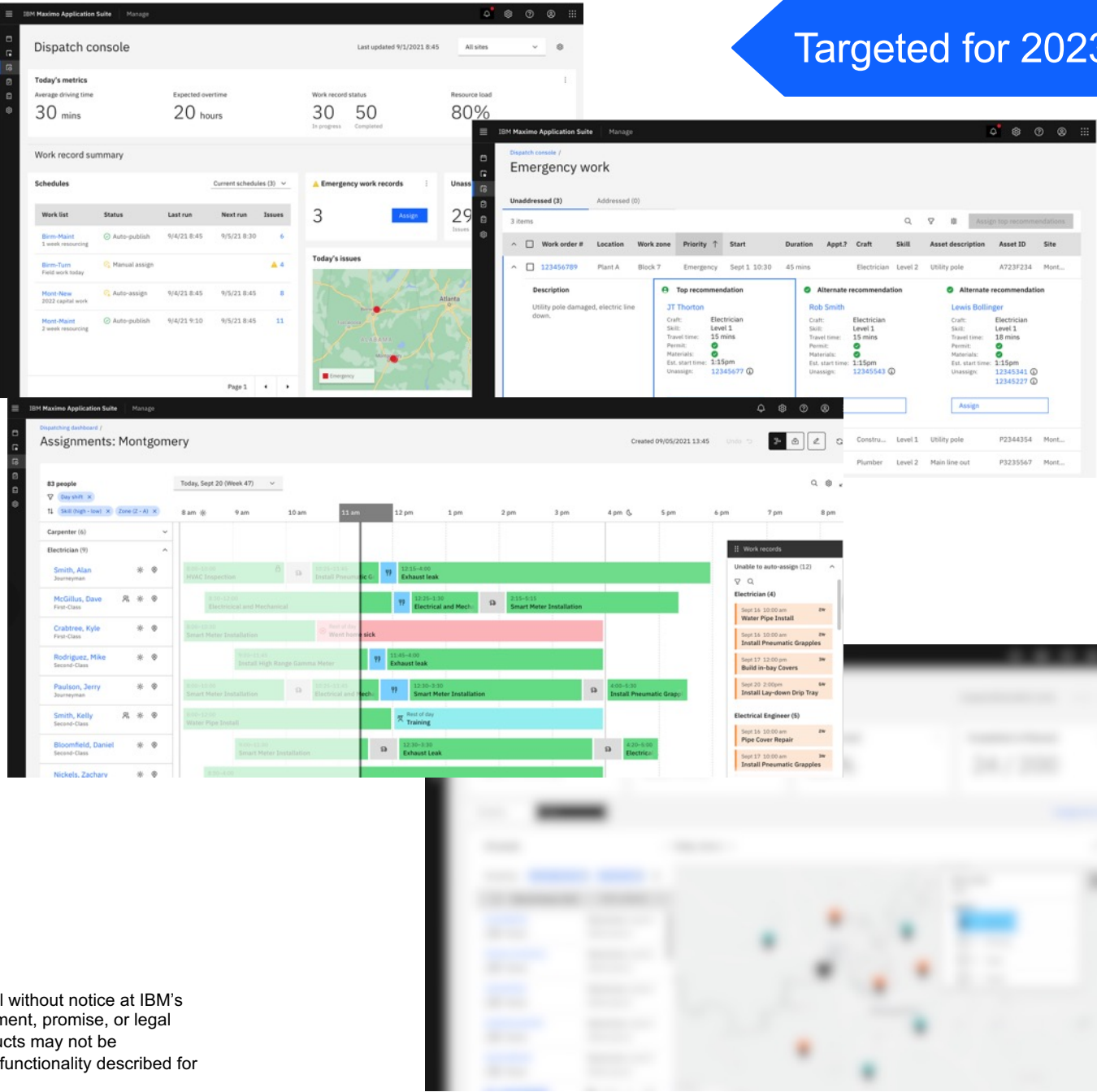
Role Based Application

Targeted for 2023

Overview

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

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



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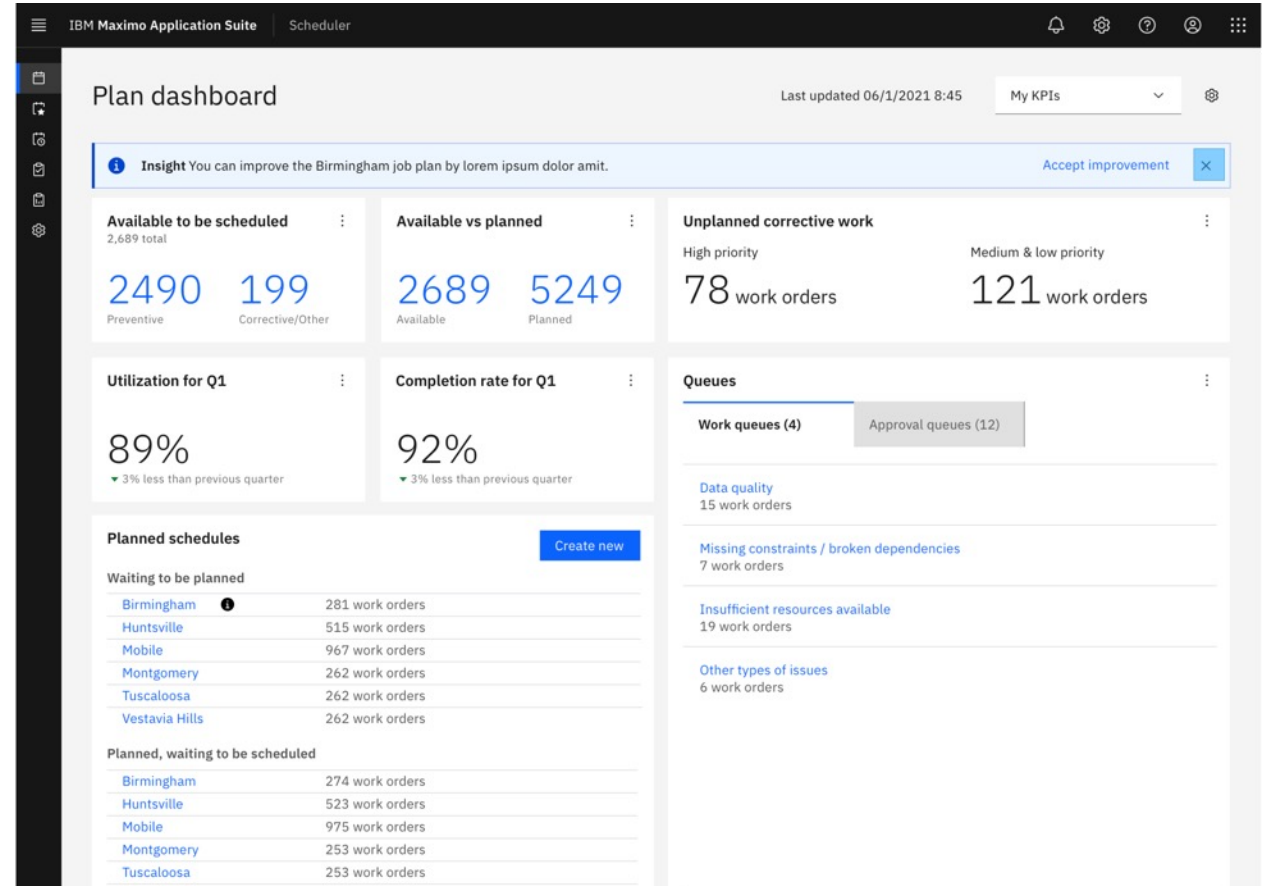
Planning Dashboard

Role Based Application

Targeted for 2024

Overview

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



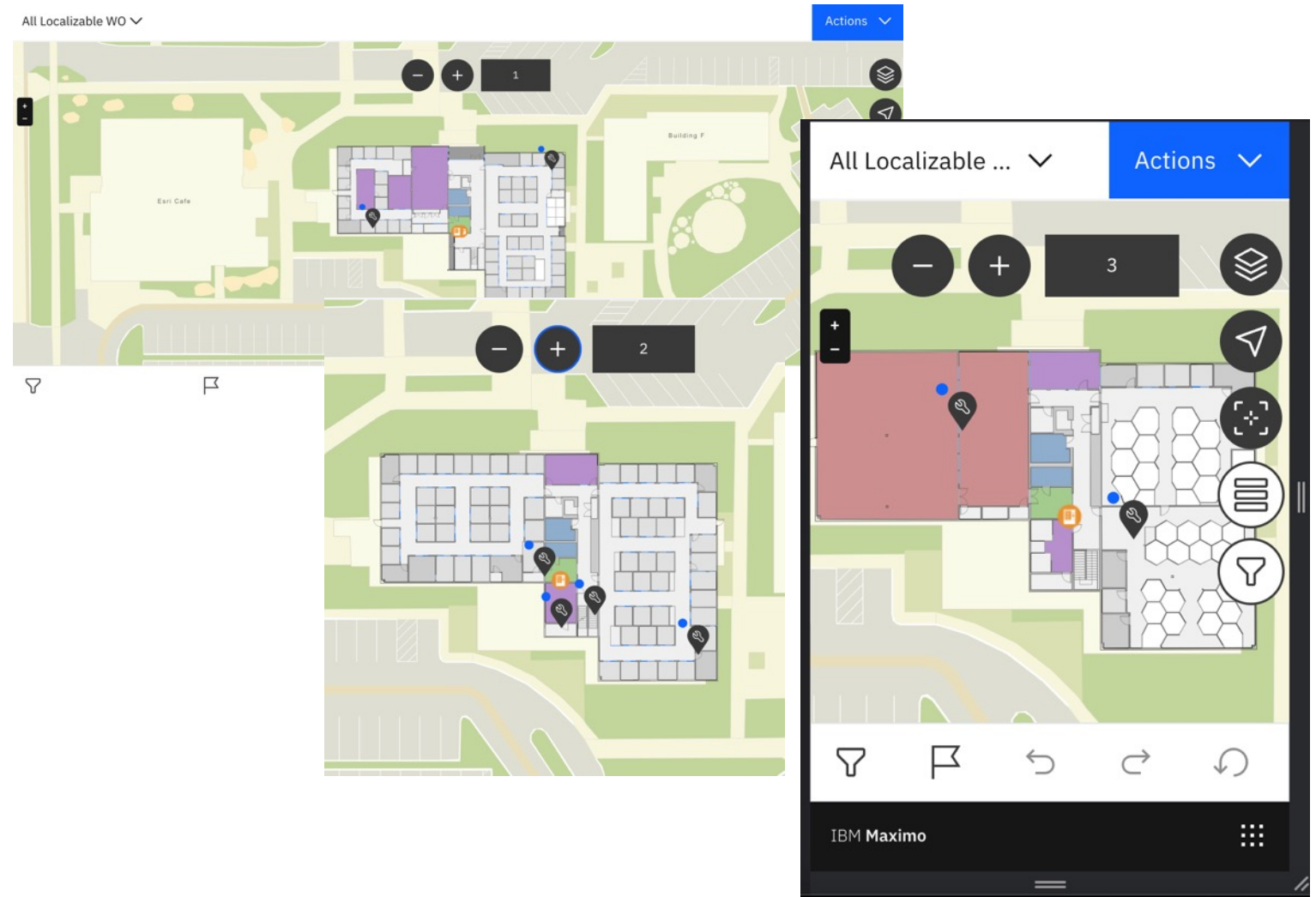
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Spatial – ESRI Indoor mapping

Available

Maximo Spatial

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



MAS Maximo Mobile

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



1 application,
1 role-based interface



Connected
and disconnected



Intelligent workflows =
blue button



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



Intelligent forms =
configurability

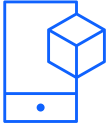
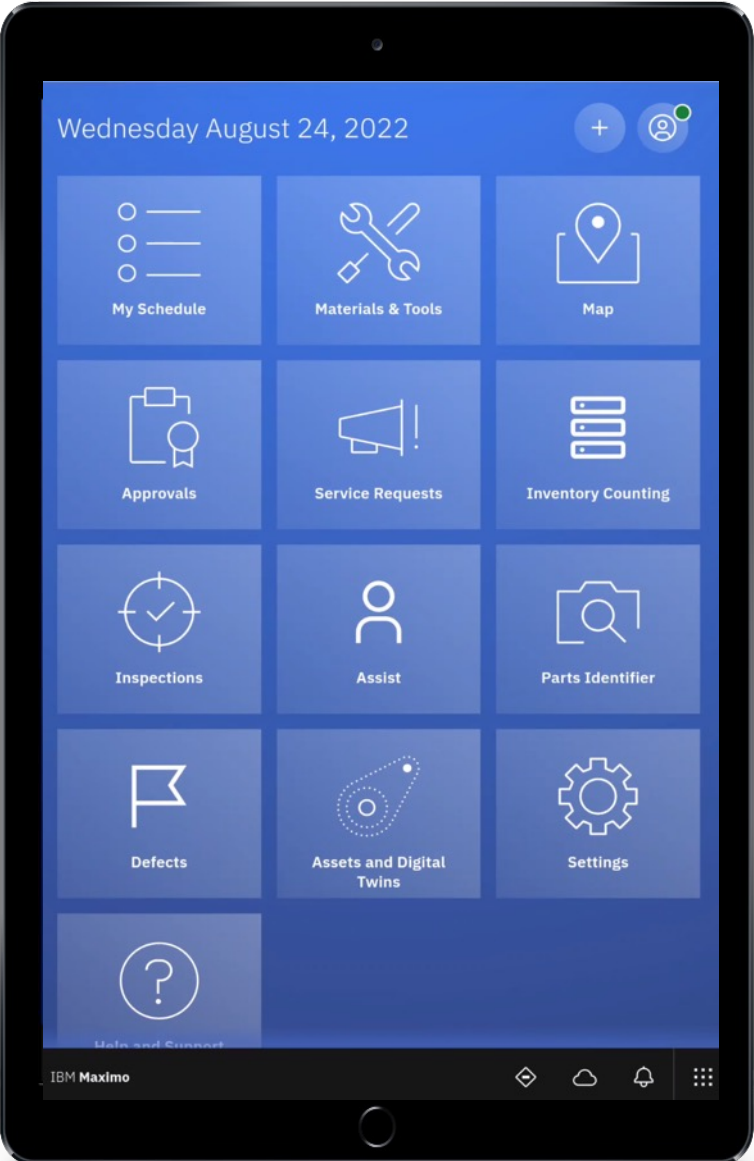
Downloadable from:



Apple App
Store



Google Play
Store



Continuing to deliver on mobile applications



• Technician

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

• Inspection

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

• Work Approvals

- Review work
- Approve work.

• Service Request

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

Inspections

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

The image displays three overlapping screenshots of the IBM Maximo Mobile application interface, illustrating the inspection workflow. The top-left screenshot shows a list of inspection records under the heading 'In Progress', with 15 records and a 'Check for updates' button. The middle screenshot shows a detailed view of a 'Pump Inspection' for asset 'PM T1089', with a 'Complete' button. The bottom-right screenshot shows a 'Previous results' screen for the same inspection, displaying a list of responses to the question 'Any signs of leak?'.

Screenshot 1: Inspection List

- Time: 08:57
- Status: In Progress
- Records: 15 records
- Action: Check for updates
- Item: Pump Inspection
- Due: Today, October 22, 2021
- Asset: 11430 00 BR430 Condensate Return Pump-Centrifugal/100GPM/60FTHD
- Buttons: Estimat, Resu

Screenshot 2: Inspection Details

- Time: 08:57
- Asset: PM T1089
- Action: Complete
- Section: Pump Inspection
- Asset ID: 11430 00
- Section: External Section
- Section: Leaks
- Question: Any signs of leak?
- Options: Yes (selected), No
- Text: Please describe (fdgdfgdf)
- Section: Electrical connections
- Question: Are the connections secure?
- Options: Yes (selected), No
- Section: Corrosion
- Question: Is there visible corrosion or rust?
- Options: Yes, No (selected)
- Section: 2. Pump Engine
- Footer: IBM Maximo Mobile

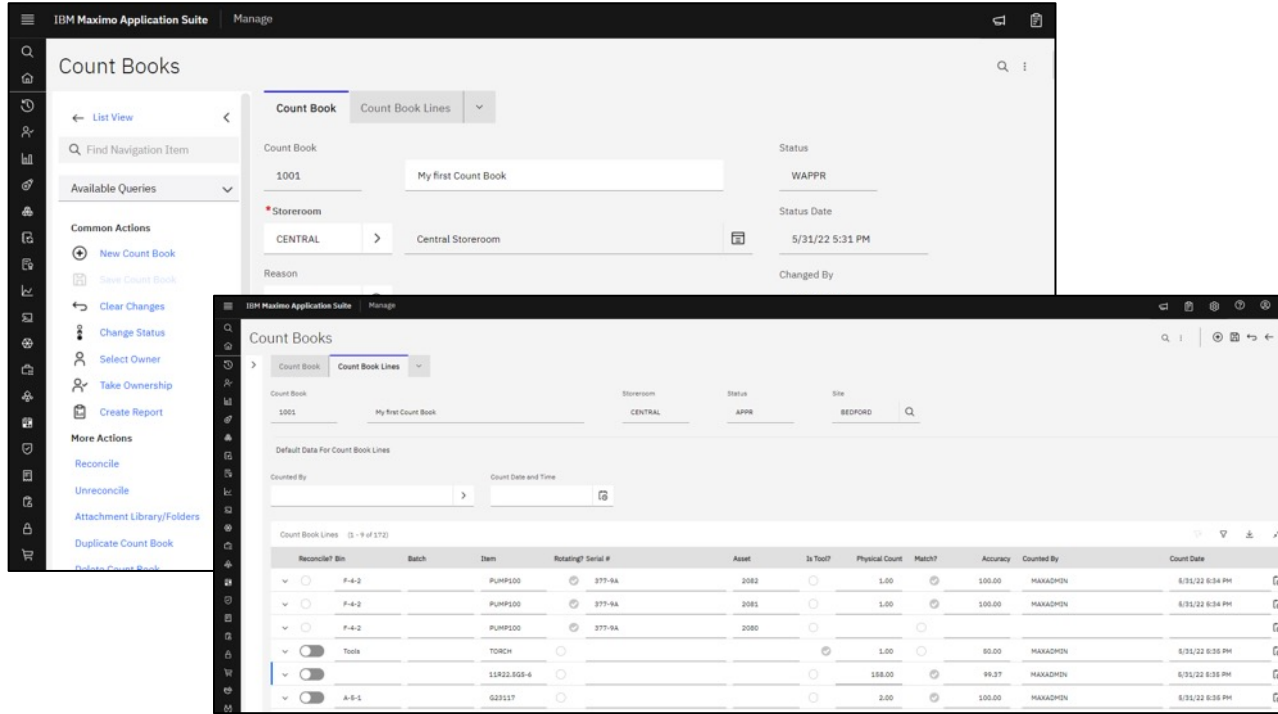
Screenshot 3: Previous Results

- Time: 08:57
- Action: Complete
- Section: Previous results
- Question: Any signs of leak?
- Requirement: 1 required of 1
- Records: 3 records
- Response 1: Yes (October 21, 2021)
- Response 2: No (October 21, 2021)
- Response 3: No (October 22, 2021)
- Footer: IBM Maximo Mobile



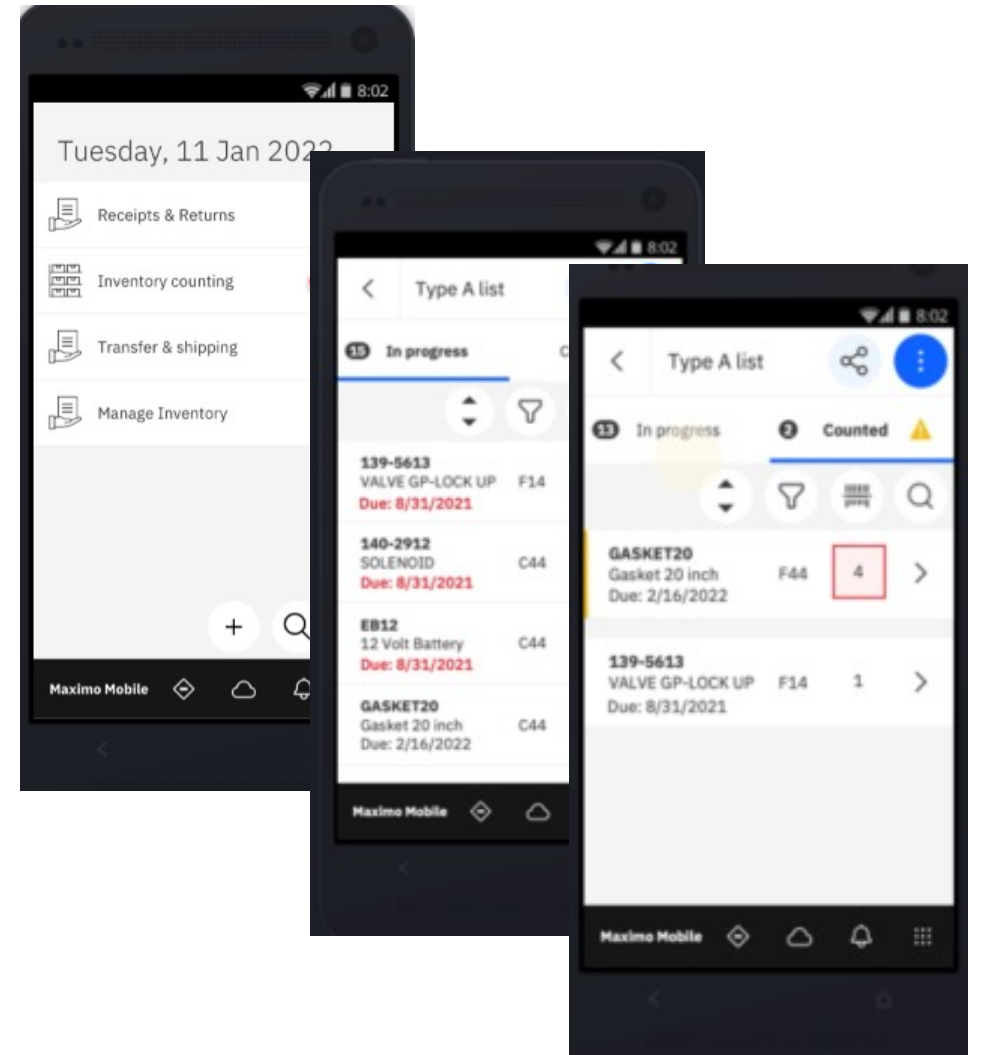
Storeroom Clerk

Inventory Count Books – Inventory Counting



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

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



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

Adaptive UI and Configuration of the Maximo Application Framework

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

Drive Efficiency at Scale



Accelerate adoption



Protect your investment



Quicker time to value

The screenshot displays the IBM Maximo Configuration interface for the 'SEP Work Technician' application. The interface is organized into three main sections:

- Left Navigation Pane:** Lists various work center pages and templates. Under 'Work center pages', items include Work order list, Materials & tools, Work order details, Map, Attachments, Meter readings, Work log, Tasks, and Report work. Under 'Templates', items include Asset details, Materials list, Tools list, Work order details, and Work order list (which is currently selected).
- Main Content Area:** Shows a configuration for a 'Work order list' page. It includes a 'Back to Work order list page' link, a 'Template: Work order list' label, and a 'Tablet' view indicator. The main content displays a work order card for 'Generator Overhaul' (PM 1007) with a status of 'Approved' and 'Priority 1'. The card also shows 'Due tomorrow. Due March 18, 2020.', the location '11230 Emergency Generator Main Boiler Room', and the address '78732 Avenue A Orlando, FL'. A 'Start work' button is visible at the bottom right of the card.
- Right-Hand Panel (Edit card):** Provides configuration options for the work order card. It includes fields for 'Name' (Work Order) and 'Description' (This is a card.). The 'Touchpoints' section has checkboxes for Attachments, Map view, Materials & tools, Meter readings, and Work log notes. The 'Action' section has radio buttons for Change status, Start/stop work, and Z action.

Maximo application framework configuration

Configuration Capabilities:

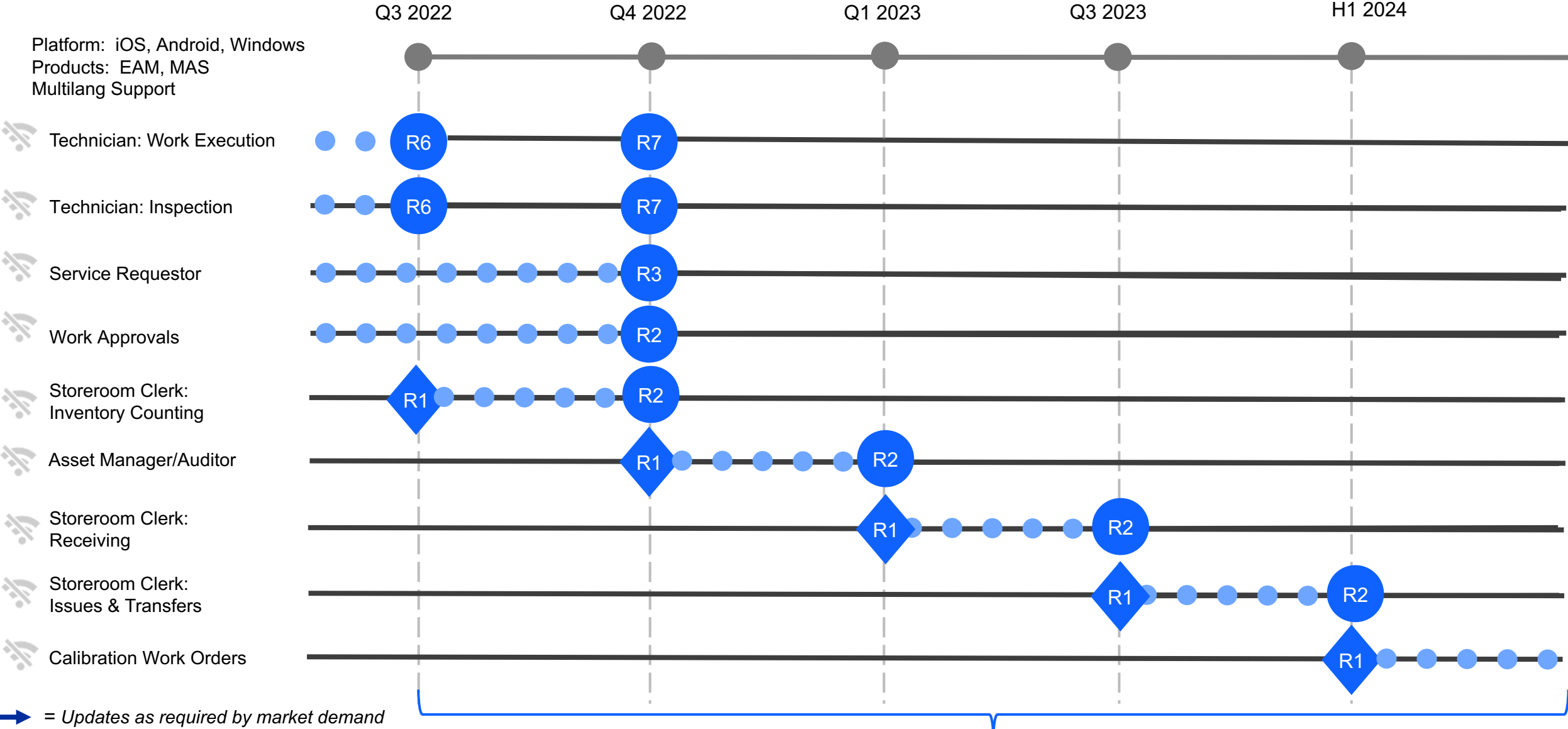
- XML Editing Page
- Component Property Editor
- Duplicate Application
- Customization enablement
- Preview changes
- Upgrade Tooling (XML Diff)

The screenshot displays the IBM Maximo Application Configuration interface. The top section shows the 'Application list' with 8 results. Below this, the 'TECHMOBILE' application is selected for editing. The interface is divided into several panels: a left sidebar with a component tree, a central XML editor showing the 'app.xml' file, and a right 'Properties editor' for the selected component. At the bottom, a mobile app preview is shown with a 'Get materials & tools' button and a list of records, including 'Calibration 102' and 'Calibration 103'. A context menu is visible over the application list, offering options like 'Duplicate', 'Redownload', and 'Delete'.

App name	Description	Status	Last update	Last updated by	Version	Revision
CIMOBILEDFFECT		ACTIVE	2022-02-04T07:...	UPDATEDB	8.3.0.0	0
INSPECTION	Inspections	ACTIVE	2022-02-04T07:...	UPDATEDB	8.7.0.0	0

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

Roadmap to Expand Maximo Mobile



Mobile Platform and Enhanced Configuration Tool

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Maximo Assist

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



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



Custom training repository



Journals, magazines



Customer service/helpdesk data



Ask expert technician

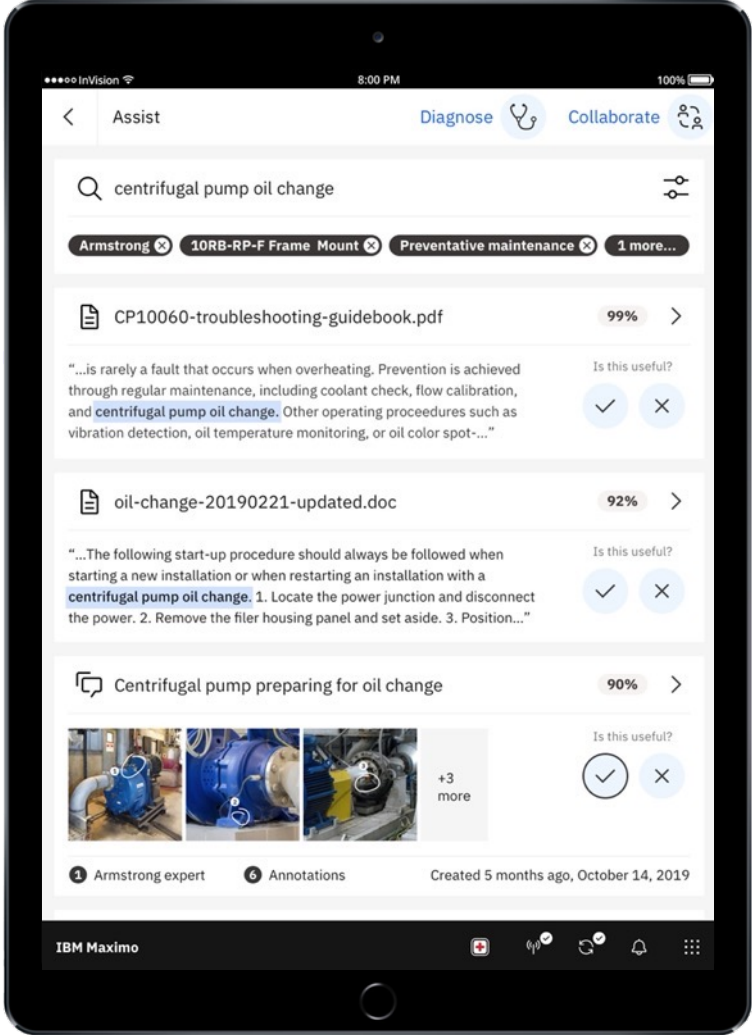
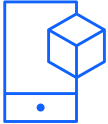


Historical work orders
(EAM data)



Manufacturer and owner manuals, engineering manuals

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



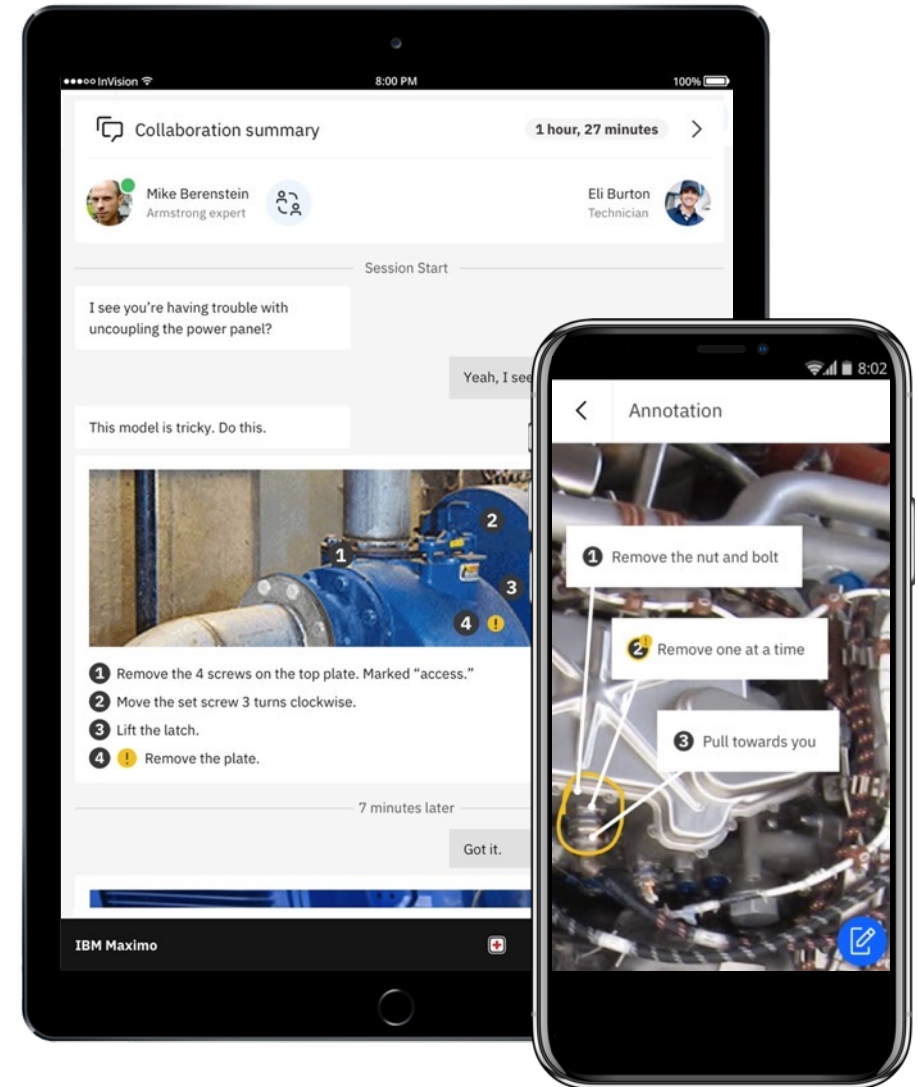
Remote Guidance session history [attached to the Maximo work order](#) for future reference and added to AI knowledge base



[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

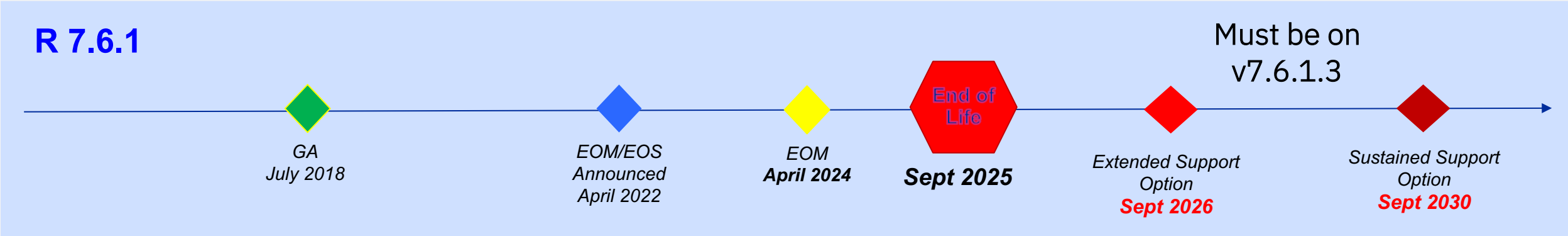
- Between IBM and 3rd Party Solutions
 - MAS to Workday

- **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 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.

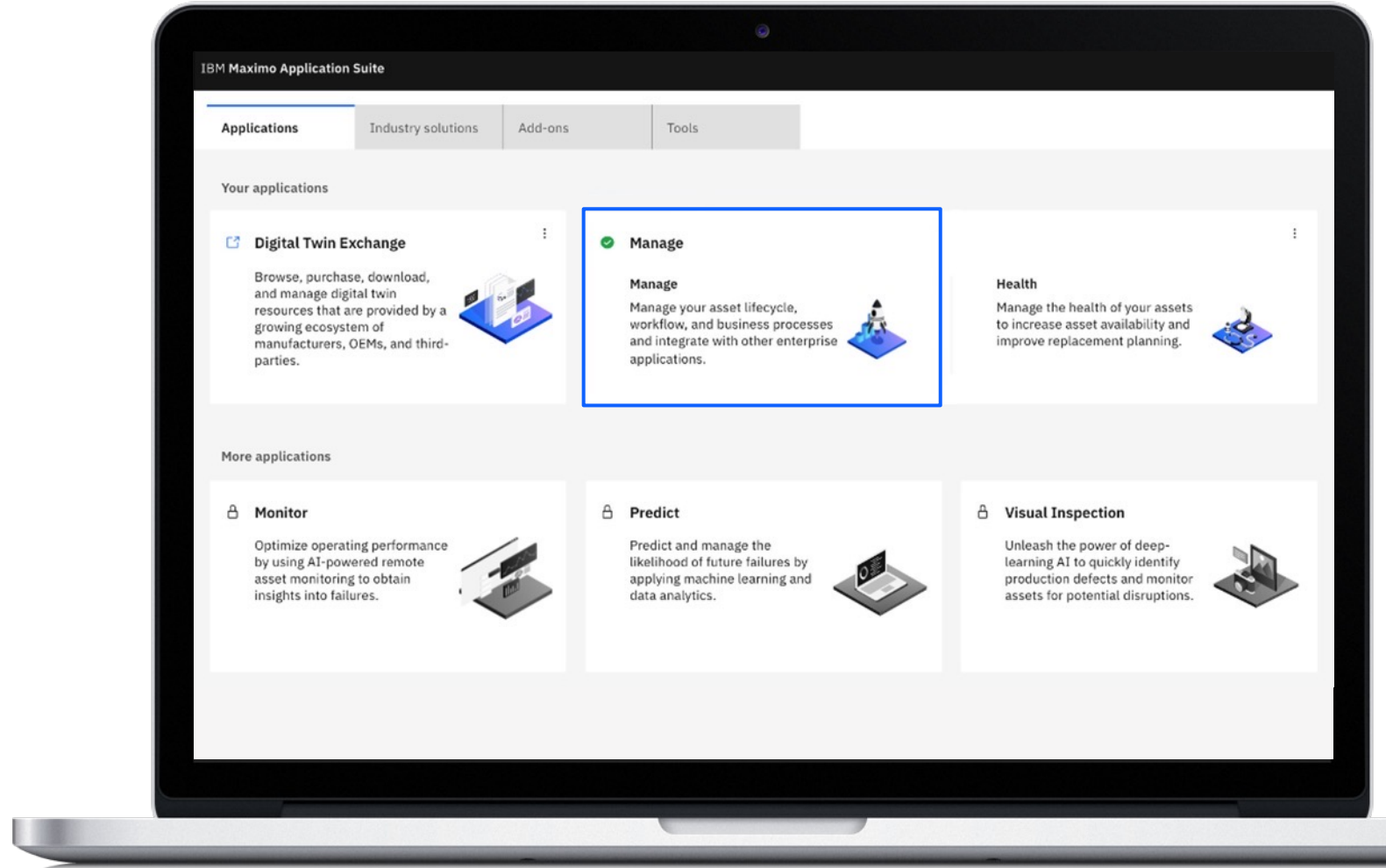
IBM Sustained Support: Enables clients to continue to get support for "how to" questions, usage issues, and known defects published in IBM Fix Central after IBM standard/extended support ends for 7.6.1.x. IBM Sustained Support does not include support for new defects or new security fixes.

Upgrading to Manage in the Suite

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

Manage in the Suite

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



MAS Digital Trials

Maximo Application Suite

(MAS SaaS with Health & Manage capability only)

Environmental Intelligence Suite (EIS)

Envizi ESG Suite



Customer/Partner/Prospect signup links

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

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

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

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

Maximo Digital Learning Subscription

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

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

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

[IBM Maximo Individual Learning Subscription](#)

[IBM Maximo Enterprise Learning Subscription](#)

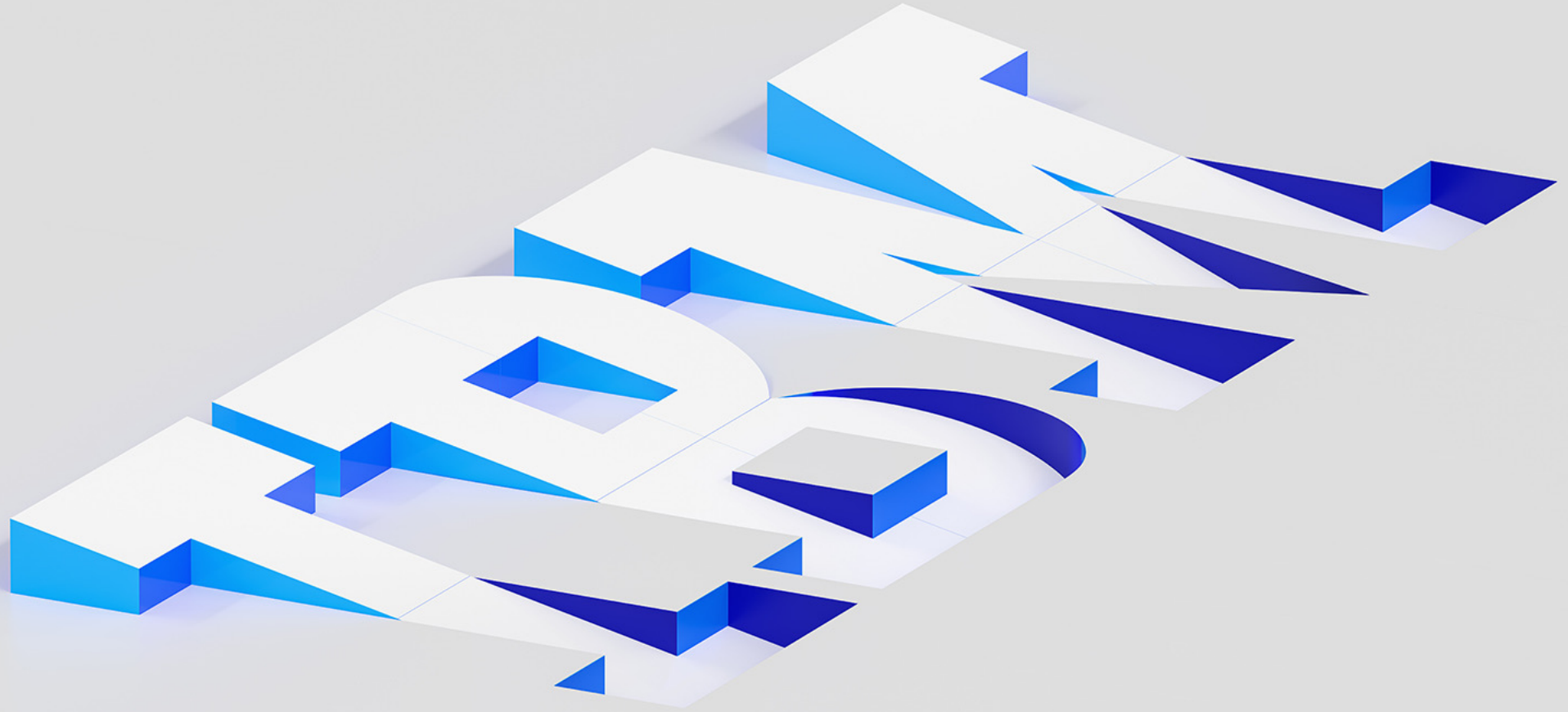
Individual subscription

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

Enterprise subscription

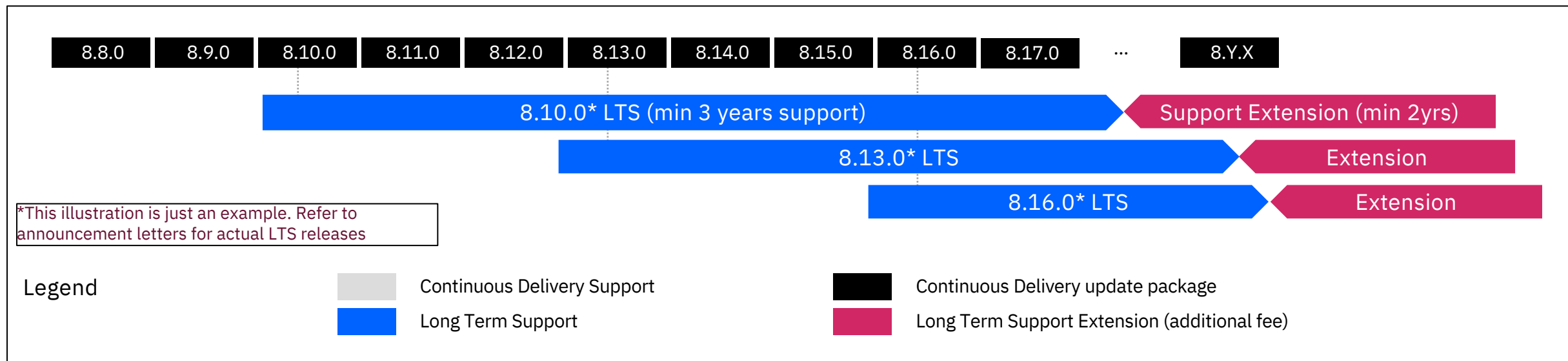
- 30 digital enrollments for up to 30 individual students for 12 months for one fixed price.
- Company Administrator can assign and track up to 30 courses to enterprise employees.
- List price \$12,504 USD

Questions?



IBM Maximo Application Suite continuous delivery support

Starting with MAS v8.7



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

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

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

What's New in MAS 8.10 for Manage

Manage

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

Maximo Mobile

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

Scheduling Dashboard

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

Operational Dashboard

Operational Dashboard

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

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

Workflow Assignment -Advanced Filter added to Workflow Assignment List page

Spatial

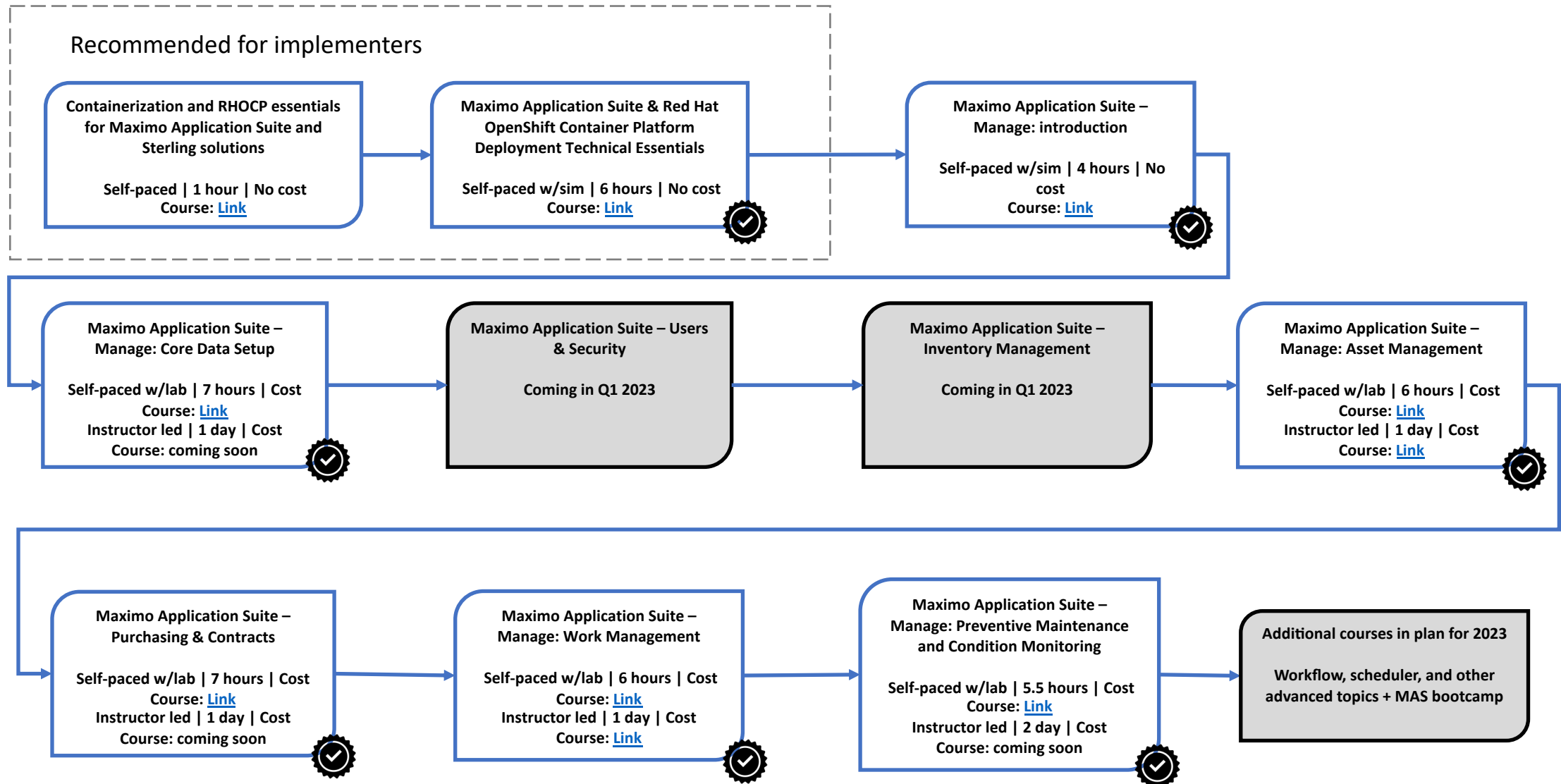
- Add and Edit tool - Phase 1 - Create Feature and Link
- Enhancement of Identify Tool / Preview Card
- Query Tool - Offline mode & Nearby - Around me + Maximo Objects
- Highlight Line Feature. / Enhancement - Data Panel
- Replace PlusSGeoJson for Geometry and auto-locate
- Indoors - Automatic Association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

Civil Infrastructure

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

IBM Maximo Application Suite – Manage 8.x

Technical education recommended roadmap



Technical certification

Maximo v7.6

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

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



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

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



Maximo Application Suite

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

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



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

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



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

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

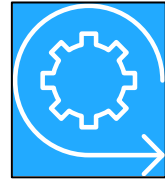


AI Apps on OpenShift– Delivering Expanded Value

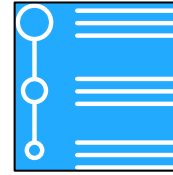
Scale your operations with optimized resources

38% percent lower infrastructure

35% less IT staff time per application



Operations



Management

Manage Deployment Lifecycle through single pane of glass

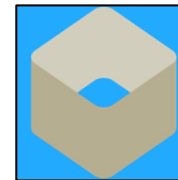
60% increase in IT administrator

Packaged with latest and greatest technology stack

80% reduction in installation effort



Packaging



Containers

Production ready containers built with highest industry standards

80% faster time to market

Secure & Integrated

Value - ROI

Development-Cost

(*)Sources:

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



Georgia MUG 2023 Attendee Survey

Instructions

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

Liked hearing about other companies experiences with implementations

Asset management for Maximo

Variety of Subject Matter

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

Open forum for discussion on best practices

Enjoyed Lessons learned and hearing about people's journeys
Collaborations
Willingness to share
Demonstrations

Innovative add-on solutions- IoT

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

Networking opportunities were great Introductions of users at least by companies represented would have been great

Real World Industry Solutions Offer Training and/or Testing Options

Meeting other Maximo Users!

Customizations vs configuration.

The high tech new screens

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.

Struggles and successes

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 Projotech 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.

