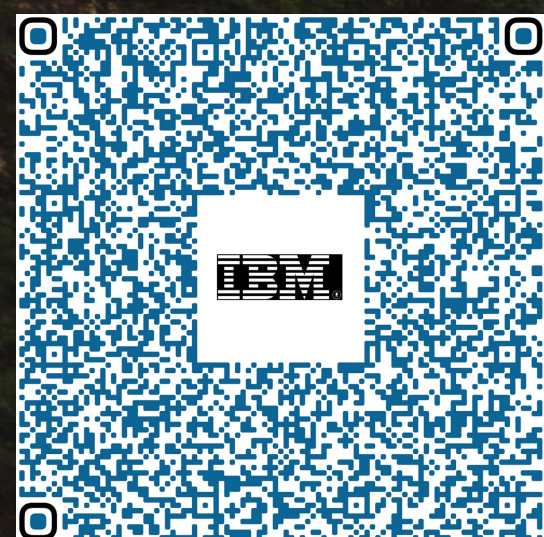


IBM Sustainability Software Maximo Application Suite



*Your Pathway To AI Driven
Asset, Operations, & Maintenance
Performance Management*

Chuck Ratigan
Customer Success Manager
IBM Sustainability Software
cratigan@us.ibm.com



March 21st, 2024

Audience Engagement: Start off with Questions

- 👉 **Release Level** – 7.6.1.2, 7.6.1.3, MAS 8.x
- 👉 **Work Order Mgt** – Job Plans, PM's
- 👉 **Assets** – Condition / Health, Performance, Monitoring
- 👉 **Operations Management** – Assignments, Scheduling, Routes, Decision Support, Operations Dashboards
- 👉 **Business Reporting** – Performance, Data, Reporting, Decision Support, Data
- 👉 **GIS Centric** – Planning, Execution, Role Based, Multi-Platform (desktop, mobile, hybrid)

Define Your Roadmap To Success

IBM

Are You Getting The Most Out Of Your
Maximo Investment?



ABC's of Exploiting Maximo Technology

A

Assess as-is

- current processes, practices, & technology deployment in support of asset operations, maintenance, business management, & value
- application rationalization – current customizations, configurations, integrations, & 3rd party applications with respect to processes, cost and value.
- IT Infrastructure strategy, architecture, & application management strategy.

B

Build the plan

- implementation roadmap
- measurements of success
- deployment plan
- adoption (processes, practices, documentation, training, & support)

C

Execute **Change** management

- process simplification with life cycle integration
- Implement best practices
- Organization Change Management – educate, adopt & perform
- Project governance

ABC's of Exploiting Maximo Technology

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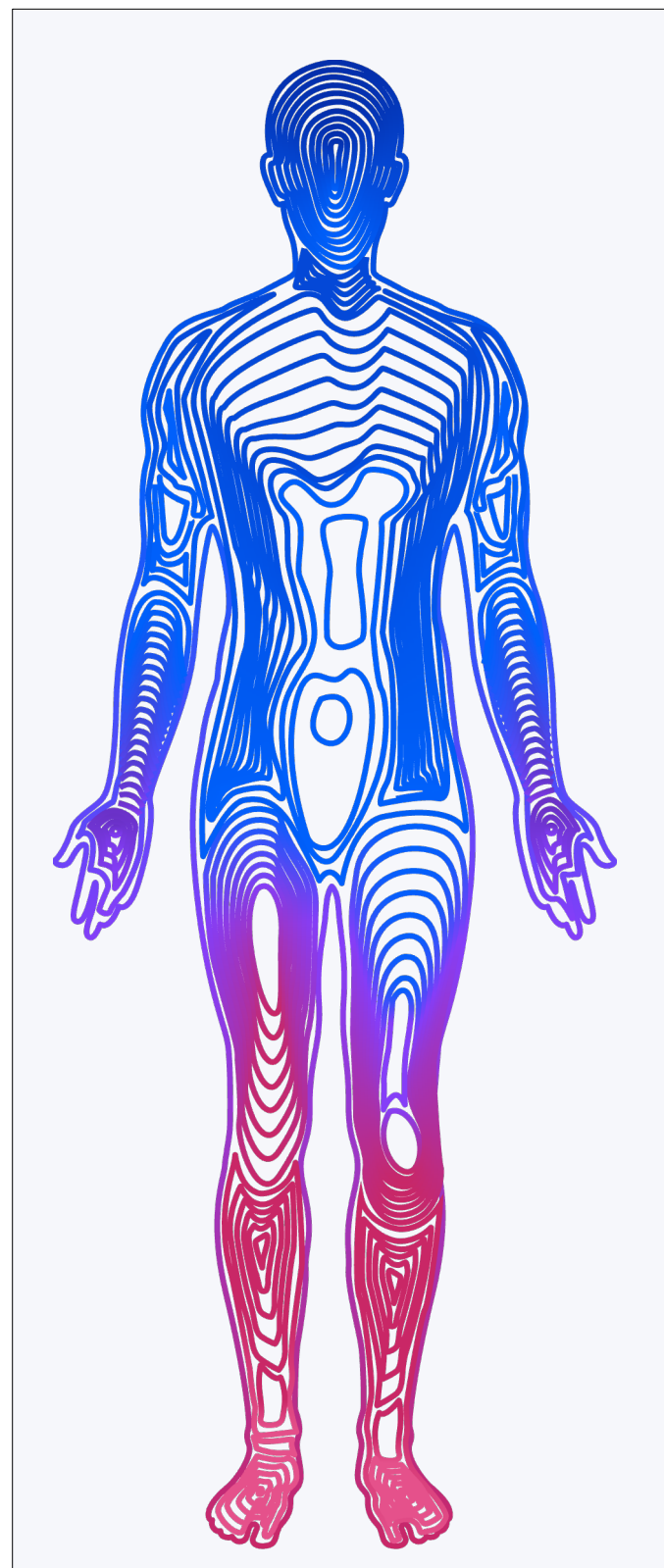
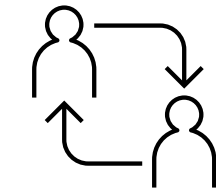
Execute **Change** management

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Implementation Self Assessment : 1,2,3 Approach

1) High Level Health Scan

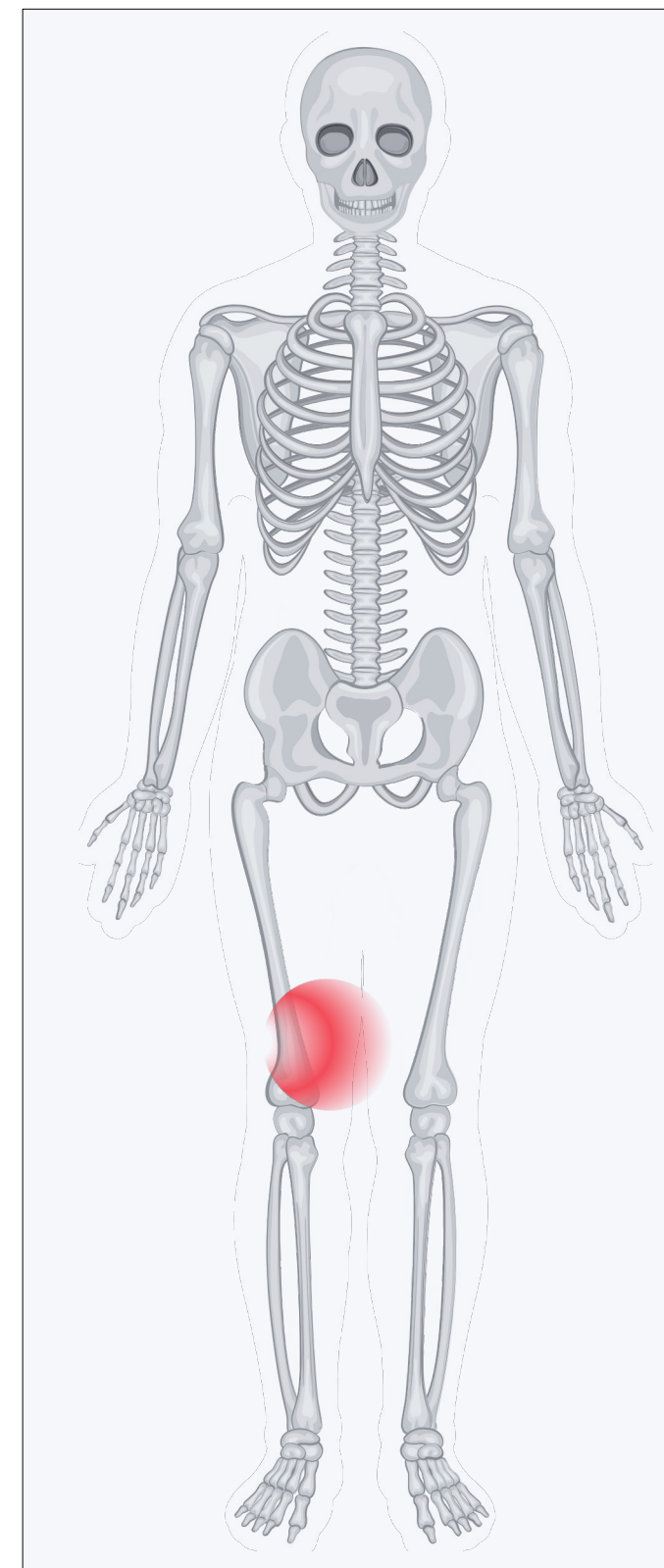
Maturity Self assessment



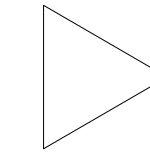
- Business Priorities
- Are objectives being achieved
- Identify areas of needed improvement
- Maturity of deployment / Adoption
- Usage maturity
- Ability to execute (Training)
- Help needed

2) Process Level Diagnostic

Consultative Led Diagnostic

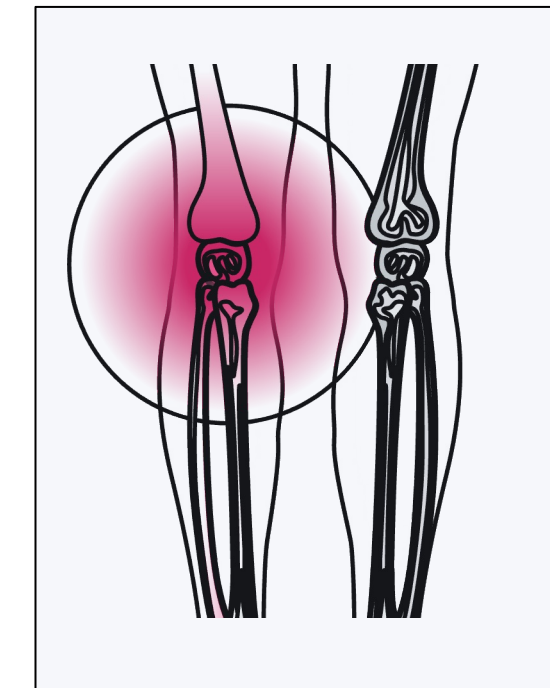


- Identify maturity root condition and impact
- Identify business process areas of improvement and dependencies
- Map current diagnostic, areas of improvement, & priorities
- Determine ability to execute (readiness assessment)
- Define proposed business value (BVA)
- Define next steps



3) Treatment Plan

Solution Design and execution plan - Process Re-engineering, Best Practices, Use Case configuration, ...



- Develop Improvement plan & solution design
- Define execution plan
- Plan execution / development of MVP
- Measure progress / Results against desired outcomes
- Continuous improvement.

Define Your Roadmap To Success

ITBIM

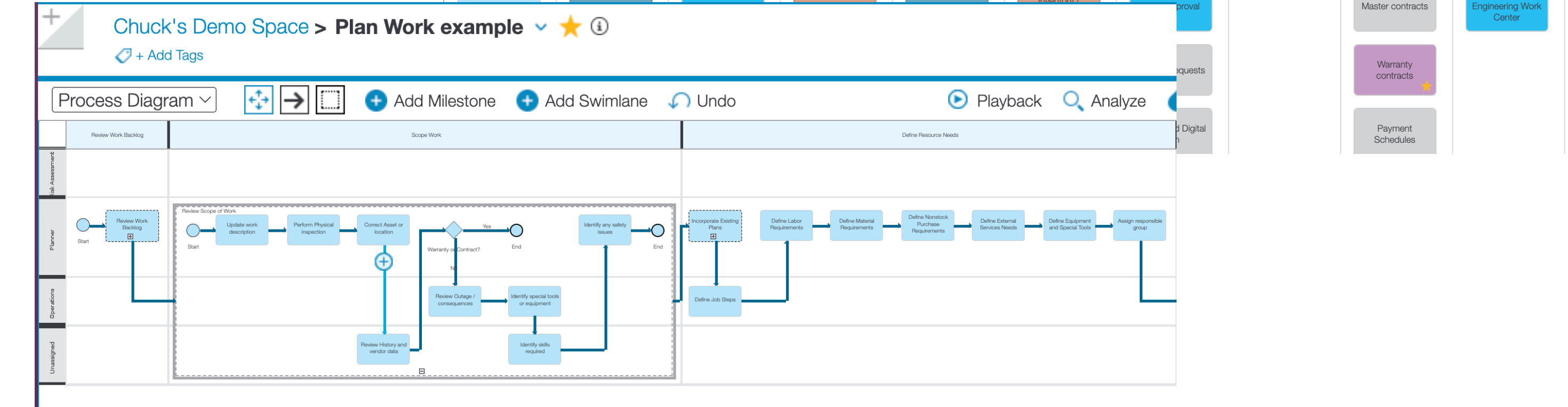
Maximo Discovery Demonstration



Discovery Framework: Artifacts for a plan!

Discovery Map + Add Milestone + Add Activity ↶ Undo 🔍 Analyze ✖ Hide Color Legend

⬜ No Plans to Deploy 🔵 Opportunity to Add 🟢 Value Being Realized 🟡 Follow up Information Needed 🔵 Opportunity to Improve 🟠 Not Yet Assessed
🔴 Value Not Being Delivered



Work Order Tracking

Details Process Links Problems Policies Documentation Attachments Comments

Working with work orders

Last Updated: 2022-05-12

Work orders initiate the maintenance process and create a historical record of the work that is performed.

- Creating work orders**
A work order specifies the information about the work that must be performed for an asset, location, or configuration item. You can add work plans, job plans, or safety plans. You can also record actuals as the work progresses.
- Reporting actuals for work orders**
As work progresses on an approved work order, you can report the actual labor hours, materials, services, and tools used.
- Rescheduling and unassigning work**
You can reschedule work that has been assigned to labor resources to accommodate changes in priority or scheduling. You can reschedule multiple work records at the same time using the Reschedule Assignments window.
- Specifying meter readings on work orders**
You can enter meter readings for the asset and the location on a work order. An asset can be set up to inherit the meter readings of its parent asset or its location.
- Enabling preventive maintenance alerts for work orders**
You can use preventive maintenance alerts to notify you of pending preventive maintenance work that is scheduled for assets or locations in work order records.
- Reporting downtime for assets**
You can report the start time and the end time of the downtime for an asset after it has occurred.
- Swapping assets**
You can swap assets associated with a work order. The swap action applies to the work order and all of the assets, locations, and configuration items on its child work orders. The term "work order" can refer to a work order, change, release, or activity record.

g work orders with classifications and attributes

IBM Maximo

Maximo 7.6.1.2 Assessment Readout
June 16th, 2022

IBM Maximo 7.6.1.2 Assessment

IBM® Maximo® Asset Management is an integrated productivity tool and database that helps you manage all of your asset types on a single software platform. Built on a service-oriented architecture (SOA), Maximo Asset Management delivers a comprehensive view of all asset types, their locations, and the work processes that support them, to provide you with optimal planning control, audit, and compliance capability.

The Maximo database provides critical information about asset resources, including key attributes their configuration, and their physical and logical relationships to other resources. From the start center, you can establish key performance indicators (KPIs) to monitor asset conditions and trigger automated action based on changes. You can create, assign, monitor and report on key process components such as work orders, service desk tickets, and purchase orders, including status, from start to finish. You can also include attachments, such as map pictures, and URLs to each record or task to enhance communication and productivity further.

This Maximo de...

The output leveraging t... We also cap...

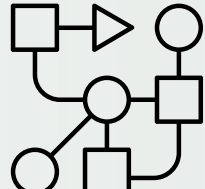
This assess aligns with:

The following...

Challenges	Severity	Frequency
critical level of skilled maintenance technicians	High	High
capturing operational data	High	High
able to generate Business reports due to data not being captured	High	High


Maximo System Condition / Plan

Customizations

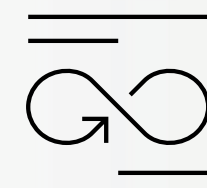
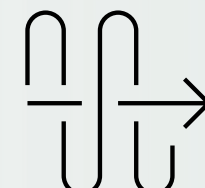
Out of the Box 1		Highly Customized 5
----------------------------	-------------------------------------------------------------------------------------	-------------------------------

MAS Upgrade / Migration

Planning – Completed

Planning 1		Migrated 5
----------------------	---------------------------------------------------------------------------------------	----------------------

Upgrade - Migration

Upgrade 1			Migration 5
---------------------	--------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------	-----------------------

Define Your Roadmap To Success

IBM

Deployment and Migration to
Maximo Application Suite



спасибо 谢谢
GRACIAS 谢谢

THANK YOU

ありがとうございました MERCI

DANKE धन्यवाद

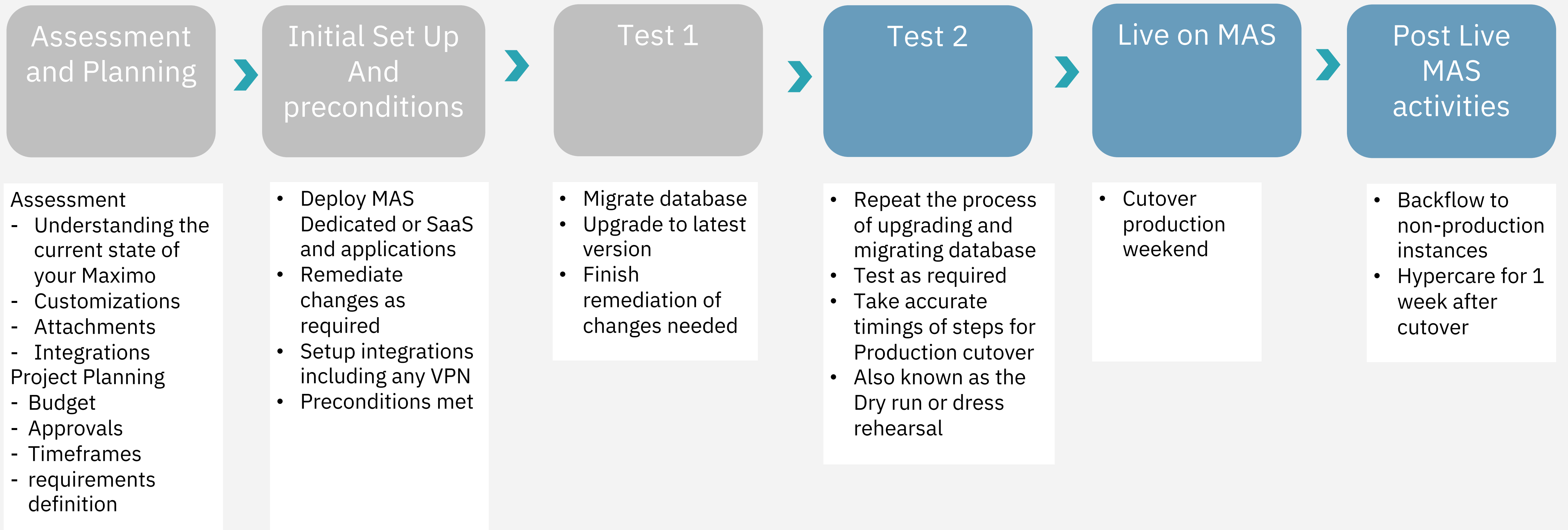
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Define Your Roadmap To Success

ITBM

Resources

Journey to MAS Migration: High level Process Review



Define Your Roadmap To Success

IBM

Are You Getting The Most Out Of Your
Maximo Entitlement?



EAM Technical Assessment: Overview IBM Expert Labs

Technical Assessment for MAXIMO /SaaS Flex upgrade and migration to MAS Managed Services

Key Activities:

- Focus on application layout and technical configurations using the IBM Maximo Sizing questionnaire as a starting point
- Identify areas of impact for upgrade and migration to MAS Managed Services
- Assess data structure
- Identify customizations and assess the gap from leveraging the out of the box adapters

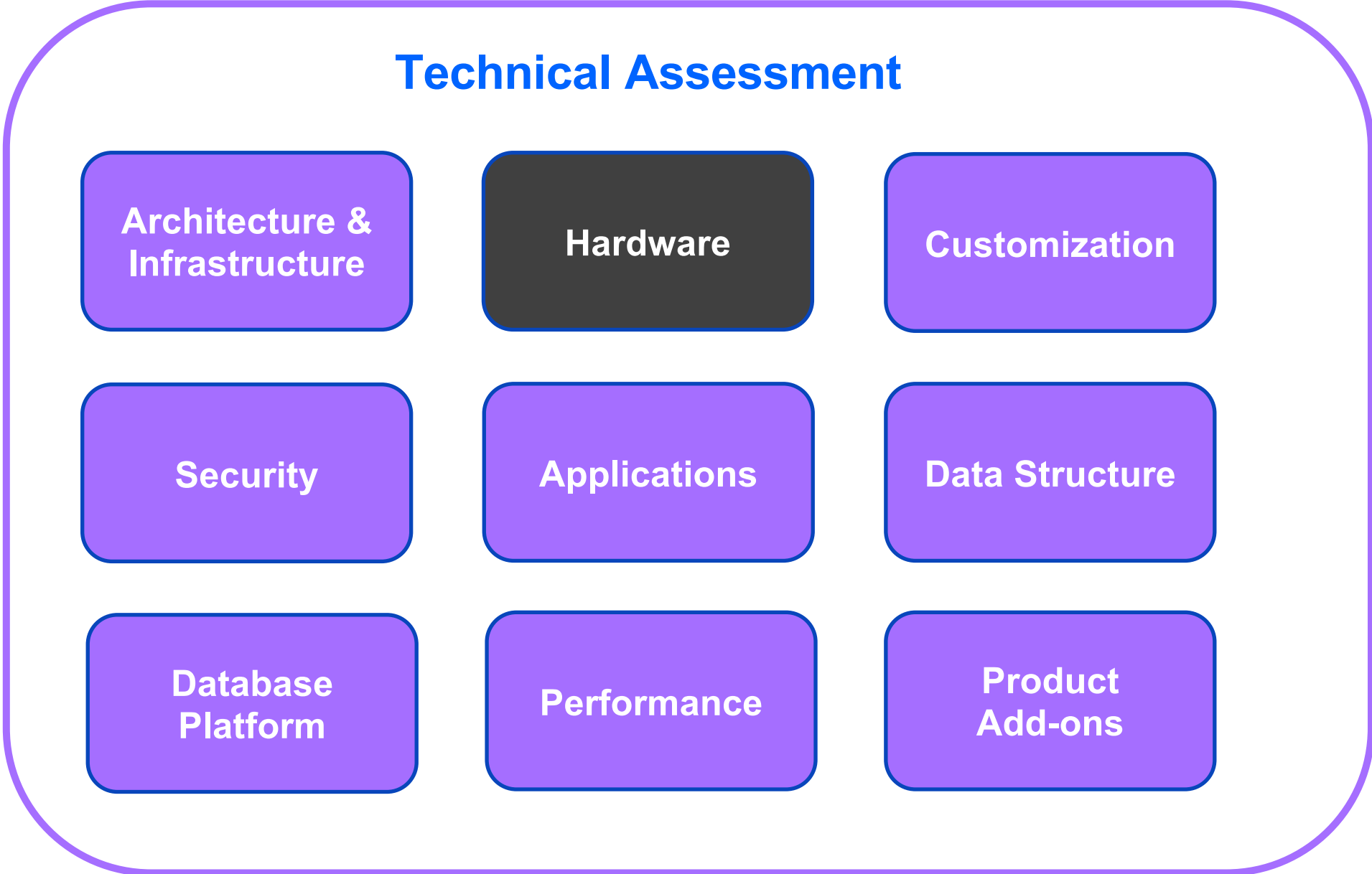
Expected Outcome:

- Maximo Technical Upgrade Assessment document containing tailored recommendations and a journey map for the upgrade

Duration:

- 5-7 weeks

Maximo Assessment Components



Resources

Planning Key Dates:

12/31/2023 – 7.6.1.2 End of ifixes

09/30/2025 – 7.6.1.3 End of Support

Building Your Migration Plan and Resources

Building Migration Plan:

- Maximo Usage application – to determine current license usage patterns
- Understand the MAS 8.x continuous delivery roadmap model
- Assess Current Maximo system customizations with the [IBM Maximo Customization Detection Tool](#).
- [Maximo Integrity Checker](#) Fix any inconsistencies in indexes, and in Maximo metadata before you upgrade to Maximo Application Suite.
- [Installing Maximo Application Suite](#) - Install IBM® Maximo® Application Suite by planning your installation, selecting a supported installation path, and setting up the initial configuration.
 - [Planning](#)

Before you install IBM Maximo Application Suite, you must plan your installation by satisfying the configuration and software dependencies for your chosen installation path.
 - [IBM Maximo Application Suite and components installation](#)

The IBM Maximo Application Suite installation process includes either customer-managed installations or IBM managed installations. Multiple platforms and environments are available to choose from regardless of the installation method.
 - [Setting up IBM Maximo Application Suite](#)

After you install IBM Maximo Application Suite, the setup program guides you through the initial configuration.
 - [Ansible collection](#)

Use the Ansible® collection to automate some of the manual steps that are involved with installing Maximo Application Suite and its components.

Get to Know Maximo Application Suite: Installation & Administration

- [* Maximo Application Suite deployment overview](#) (Self-paced learning)
- [* Red Hat OpenShift Container Platform installation overview](#) (Self-paced learning)
- [Installing Maximo Application Suite dependencies](#)
- [IBM Maximo Application Suite installation on Microsoft Azure](#)
- [MAS Installation guide](#)
- [MAS Configuration guide](#)

Maximo Application Suite: Manage v8.x Technical Education Roadmap

Recommended for implementers

Containerization and RHOCP essentials for Maximo Application Suite and Sterling solutions

Self-paced | 1 hour | No cost
Course: [Link](#)

Maximo Application Suite & Red Hat OpenShift Container Platform Deployment Technical Essentials

Self-paced w/sim | 6 hours | No cost
Course: [Link](#)

Maximo Application Suite – Manage: introduction

Self-paced w/sim | 4 hours | No cost
Course: [Link](#)

Maximo Application Suite – Manage: Core Data Setup

Self-paced w/lab | 7 hours | Cost
Course: [Link](#)
Instructor led | 2 days | Cost
Course: [Link](#)

Maximo Application Suite – Manage: Users & Security

Self-paced w/lab | 6 hours | Cost
Course: [Link](#)
Instructor led | 1 day | Cost
Course: [Link](#)

Maximo Application Suite – Inventory Management

Self-paced w/lab | 7 hours | Cost
Course: [Link](#)
Instructor led | x day | Cost
Course: Coming soon

Maximo Application Suite – Manage: Asset Management

Self-paced w/lab | 6 hours | Cost
Course: [Link](#)
Instructor led | 1 day | Cost
Course: [Link](#)

Maximo Application Suite –Manage: Purchasing & Contracts

Self-paced w/lab | 5.5 hours | Cost
Course: [Link](#)
Instructor led | 1 day | Cost
Course: [Link](#)

Maximo Application Suite – Manage: Work Management

Self-paced w/lab | 6 hours | Cost
Course: [Link](#)
Instructor led | 1 day | Cost
Course: [Link](#)

Maximo Application Suite – Manage: Preventive Maintenance and Condition Monitoring



Self-paced w/lab | 5.5 hours | Cost
Course: [Link](#)
Instructor led | 2 days | Cost
Course: [Link](#)

Maximo Application Suite –Manage: Workflow Development

Self-paced w/lab | 7 hours | Cost
Course: [Link](#)
Instructor led | x day | Cost
Course: Coming soon

Additional courses in plan for 2023

Scheduler, and other advanced topics + MAS bootcamp

 Technical education  Technical education Coming soon  Badge

Maximo Application Suite (MAS)

System Users / Administrators / Consultants

Course Title	Duration	*Format	Cost	Badge
Maximo Application Suite Learning Collection		Mixed		
Containerization and RHOC P essentials for Maximo Application Suite and Sterling solutions (DL25607G)	1 hour	Self-paced	No cost	Yes (for series)
Maximo Application Suite & Red Hat OpenShift Container Platform Deployment Technical Essentials (DL25608G)	6 hours	Self-paced	No cost	Yes (for series)
Maximo Application Suite - Manage: Introduction – (DL25606G)	4 hours	Self-paced	No cost	
Maximo Application Suite - Manage: Core Data Setup (MAX4321G)	7 hours	Self-paced with labs	Cost	
Maximo Application Suite - Manage: Users and Security (MAX4322G)	6 hours	Self-paced with labs	Cost	
Maximo Application Suite - Manage: Inventory Management (MAX4328G)	7 hours	Self-paced with labs	Cost	
Maximo Application Suite - Manage: Asset Management (MAX4316G)	6 hours	Self-paced with labs	Cost	
Maximo Application Suite - Manage: Purchasing and Contracts (MAX4323G)	6 hours	Self-paced with labs	Cost	
Maximo Application Suite - Manage: Work Management (MAX4315G)	6 hours	Self-paced with labs	Cost	
Maximo Application Suite - Manage: Preventive Maintenance and Condition Monitoring (MAX4317G)	5 hours	Self-paced with labs	Cost	
Maximo Application Suite - Manage: Workflow Development (MAX4330G)	7 hours	Self-paced with labs	Cost	
Investment Optimization for Maximo Application Suite - Manage – (DL25609G)	.5 hours	Self-paced	No cost	
Leveraging Health for Maximo Application Suite – Manage (MAX4320G)	5 hours	Self-paced with labs	Cost	
IBM Maximo Visual Inspection Overview (DL43001G)	.5 hours	Self-paced	No cost	No
Getting started with IBM Maximo Visual Inspection v2 (MAX4313G)	2 hours	Self-paced	Cost	Yes
Getting started with IBM Maximo Asset Performance Management v2 (MAX4311G)	5 hours	Self-paced	Cost	Yes
IBM Maximo Monitor solution overview (DL43005G)	.5 hours	Self-paced	No cost	No
IBM Maximo Health and Predict solutions overview (DL43006G)	1.5 hours	Self-paced	No cost	No
IBM Maximo Mobile solution overview (DL43008G)	.5 hours	Self-paced	No cost	No
Getting started with Maximo Mobile v2 (MAX4312G)	4 hours	Self-paced	Cost	No
Maximo Mobile: Customization Overview (DL25632G)	2 hours	Self-paced	No cost	
Maximo Application Suite - Manage: Core Data Setup (MAX4326G)	up 16 hr.	Instructor -Led	Cost	
Maximo Application Suite - Manage: Users and Security (MAX4327G)	up 8 hr.	Instructor -Led	Cost	
Maximo Application Suite - Manage: Inventory Management (MAX4329G)	up 8 hr.	Instructor -Led	Cost	
Maximo Application Suite - Manage: Asset Management (MAX4319G)	up 8 hr.	Instructor -Led	Cost	
Maximo Application Suite - Manage: Purchasing and Contracts (MAX4325G)	up 8 hr.	Instructor -Led	Cost	
Maximo Application Suite - Manage: Work Management (MAX4318G)	up 8 hr.	Instructor -Led	Cost	
Maximo Application Suite - Manage: Preventive Maintenance and Condition Monitoring (MAX4324G)	up 16 hr.	Instructor -Led	Cost	
Maximo Application Suite - Manage: Database configuration (MAX4338G)	16 hours	Instructor -Led	Cost	

IBM TechXchange Community

Together, we can connect via forums, blogs, files and face-to-face networking.

Find your community

IBM Sustainability →

IBM Asset & Facilities Management

Your destination for peer and expert insights to help unlock the power of data with AI and Asset & Facilities Management to advance your digital reinvention.

Join and participate in the Maximo Community [HERE](#)

Maximo Settings

[Group Home](#) [Discussion](#) 5K [Library](#) 220 [Blogs](#) 189 [Events](#) 2 [Members](#) 8.4K

- Main (141)
 - Maximo Upgrade Resources (0)
 - Upgrading to MAS (5)
 - Learn more about MAS (4)
 - Post Attachments (15)
 - Maximo Academy IoT Exchange 2020
 - Maximo Academy (7)
 - Maximo (8)
 - Maximo Application Suite (3)
 - Maximo Scheduler (0)
 - Maximo Integration and Scripting
 - Maximo EAM (0)
 - Maximo Anywhere (0)
 - Maximo Spatial (0)
 - Maximo AVP (0)

Request for Enhancement migration to AHA



AI Applications - Ideas Portal

Welcome to the idea portal for IBM AI Applications Customers

IBM Employees:

The correct URL for entering your ideas is: <https://ibm-ai-apps-internal.ideas.aha.io/>

Clients:

Shape the future of IBM!

We invite you to shape the future of IBM, including product roadmaps, by submitting ideas that matter to you the most. Here's how it works:

Post your ideas

Start by posting ideas and requests to enhance a product or service. Take a look at ideas others have posted and upvote them if they matter to you,

1. Post an idea
2. Upvote ideas that matter most to you
3. Get feedback from the IBM team to refine your idea

Help IBM prioritize your ideas and requests

The IBM team may need your help to refine the ideas so they may ask for more information or feedback. The offering manager team will then decide if they can begin working on your idea. If they can start during the next development cycle, they will put the idea on the priority list. Each team at IBM works on a different schedule, where some ideas can be implemented right away, others may be placed on a different schedule.

Receive notification on the decision

Some ideas can be implemented at IBM, while others may not fit within the development plans for the product. In either case, the team will let you know as soon as possible. In some cases, we may be able to find alternatives for ideas which cannot be implemented in a reasonable time.

<https://ibm-ai-apps.ideas.ibm.com/>

