MAS Upgrade Considerations

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EVP, Cloud & Support Services

Agenda

- Introducing MAS 9
- Legacy Maximo Support
- Upgrade Readiness
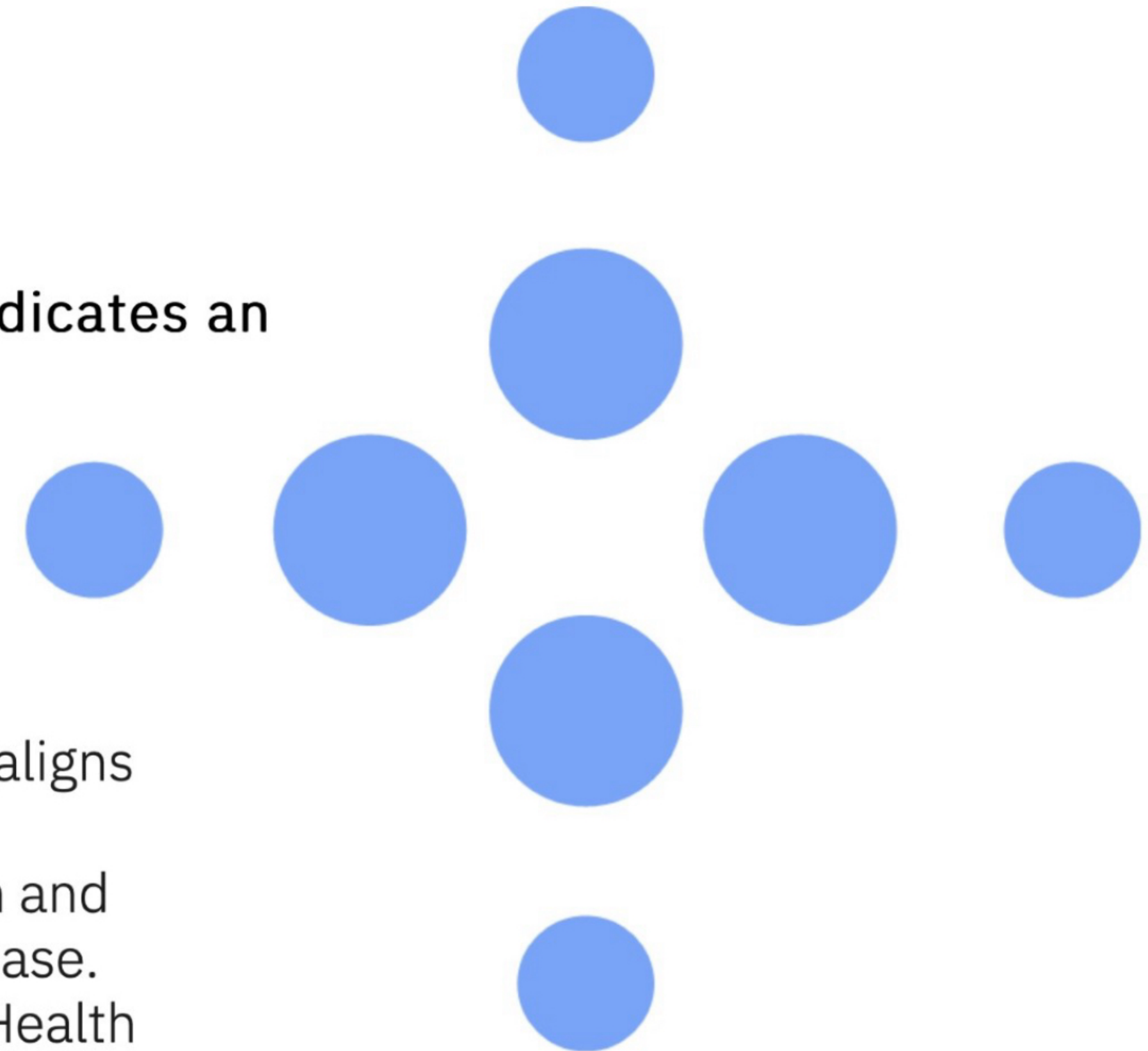- MAS Licensing
- Q&A

Introducing Maximo Application Suite v9.0

What does it mean?

Traditionally, a change to the version number of software indicates an impactful technical or functional difference from the prior release. This is <u>not</u> the case for MAS!

<u>MAS 9.0 will provide:</u>

- Introduction of a new 3+1+3 Lifecycle Policy
- Standardization of MAS product versioning which simplifies and aligns across the MAS portfolio
  - All MAS products (including Maximo Manage, Monitor, Health and Predict) will utilize the same version number within each release. (e.g., MAS 9.0 will contain Maximo Manage 9.0 and Maximo Health 9.0)

What's New in MAS 9.0 for Manage

Manage
- New Inspection Form Builder App
- New Maximo Management Interface (MMI) App
- Enhancements to Configuration Tool
  - Support for PODMAN deployment as an alternative to Docker
- Cognos 12 support
- Reliability Strategy Builder

Maximo Mobile
- Support for Calibration Work Orders
- Complex Asset Switch (ACM)
- Enhanced work order assignment updates - ability to accept/reject assignments
- Device location is now shared with dispatchers
- Quick WO reporting
- Support for Linear Assets
- Data synchronization and error handling updates
- Storeroom Apps – transferring inventory items, creating shipments and staging

Dispatching Dashboard
- Emergency Intelligent Assignment Workflow
- Integration with Mobile
- Gantt View Improvements
- Map Views of Technician's Scheduled Route
- Qualifications

Scheduling Dashboard
- Qualifications
- Customer Work Week configurable start date
- Support for Multiple Email Address
- Adding Milestone to JP/JT
- Support for not splitting assignments in Graphical Work Week
- Support for gaps in Scheduling Compliance

Operational Dashboard
- New Dashboard Page object
- Creating and editing an Operational Dashboard page
- Multi-page dashboard layout and viewing
- Dashboards added to Security Groups application
- Walk-me content

Work Orders
- New tab on Work Orders RBA for Work Plans: tasks, labor,

Work Queues
- Work Queues supporting different object structures
- End user table column personalization extends standard queue configuration

AI
Work Order Intelligence
- New AI model, broker and inference objects to determine WO problem codes from textual input and store the top 3 results.
- Work Orders RBA surfaces the AI recommendations for review/accept
- Demonstration Work Queue surfaces the top recommendation for accept

Spatial
Tools:
- Sketch Tool for Mobile
- Find My Location for Mobile
- Indoors on Desktop
- Query Tool enhancements (Save Query, Geofence + Alphanumeric Search)
- Configuration for Maximo Object Symbology (Icons, Pinpoints)
- Home Button Tool for Mobile

Enhancements:
- UI Standardization (Mobile and Desktop)
- ESRI API Migration (New Version)
- Offline Maps Enhancements
- Performance enhancements (up to 80% faster)

What's New in MAS 9.0 for Monitor, Visual Inspections, Health, Assist, IT and Accelerators

Health
- Health Mean Time Between Failure
- Identify and Correct Missing Asset Data for KPIs
- Health Made Easy with Out of the Box Score Calculations
- Maximo Models for Electric Transformers
- Health Accelerator Installation supports new automation and UI for MAS Accelerator download, installation, activation and deactivation (run-at)

Accelerators
- Know which accelerators are owned
- Simplify administration of accelerators
- Track status of any activated accelerators, including manually activated
- Know when an accelerator has a new version and what's in it
- Enhance trust and credibility with an accelerator certification program for partners

Monitor
- Redesigned the UI to fully integrate EDC and IoTp capabilities into a unified and intuitive user experience in a single user flow
- Easier to administer devices and gateways with detailed views of all the information they need such as connectivity relationships, hierarchy and operational status
- Includes a sample data stream that can be used in demos, trials and provide users with examples to test
- Enhanced Monitor with Workplace Analytics/integration with IBM TRIRIGA. Capabilities and dashboards designed to help space planners monitor and analyze how spaces are utilized

Visual Inspections
- Support GigE Vision cameras providing high-bandwidth, Power Over Ethernet (PoE), Plug-and-Play and Scalability
- Facial Redaction - image blurring technology for MVI Edge outside the detection boxes
- Data Lifecycle Management policy manager providing flexibility to enable policies based on metadata and attributes to automate removing historical images and videos

Assist
- Assist will no longer offer digitized document searching. Watson Discovery and Install AppPoint requirement are removed.
- Collaboration sessions WILL be supported.

IT
- Provides customers the ability to quickly collaborate and focus on rapid restore
  - Integrations for Chatops and Swarm, Slack
  - Microsoft Teams – foundation set
- Enabling Integrations for DevOps and Cloud mgmt., through Jira & ManageIQ
- Delivery of connected responsive Apps (mobile), provides capabilities to move work through processes on smaller form factor devices in a connected mode with rich functionality – focused on
- Service and Site reliability engineers work actions
- End user experience (Self Serve)
- Delivery of New Service View and Insights enables agents and SRE users to quickly restore or prevent outages

Key Product Life Cycle Dates

Maximo Version	Upgradable to MAS	Date of Last iFix for Release	EOM- End of Market Date*	EOS – End of Support Date**
Maximo 7.6.1	Not available	October 17, 2021	April 30, 2024	September 30, 2025
Maximo 7.6.1.1	Not available	December 11, 2022		
Maximo 7.6.1.2	Yes	December 2023 – TBD		
Maximo 7.6.1.3	Yes	July 2025 - TBD		

End of Market means no longer able to purchase licensing of these products

End of Support means product fixes and support no longer available from IBM

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.

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	DESCRIPTION	DATE
Announce End of Market (EOM & EOS)	Announcement Letter published	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

R 7.6.1
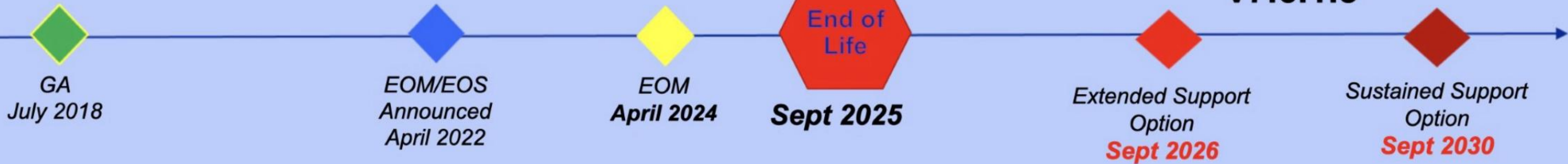
Must be on v7.6.1.3

End of Life

| GA July 2018 | EOM/EOS Announced April 2022 | EOM April 2024 | Sept 2025 | Extended Support Option Sept 2026 | Sustained Support Option Sept 2030 |

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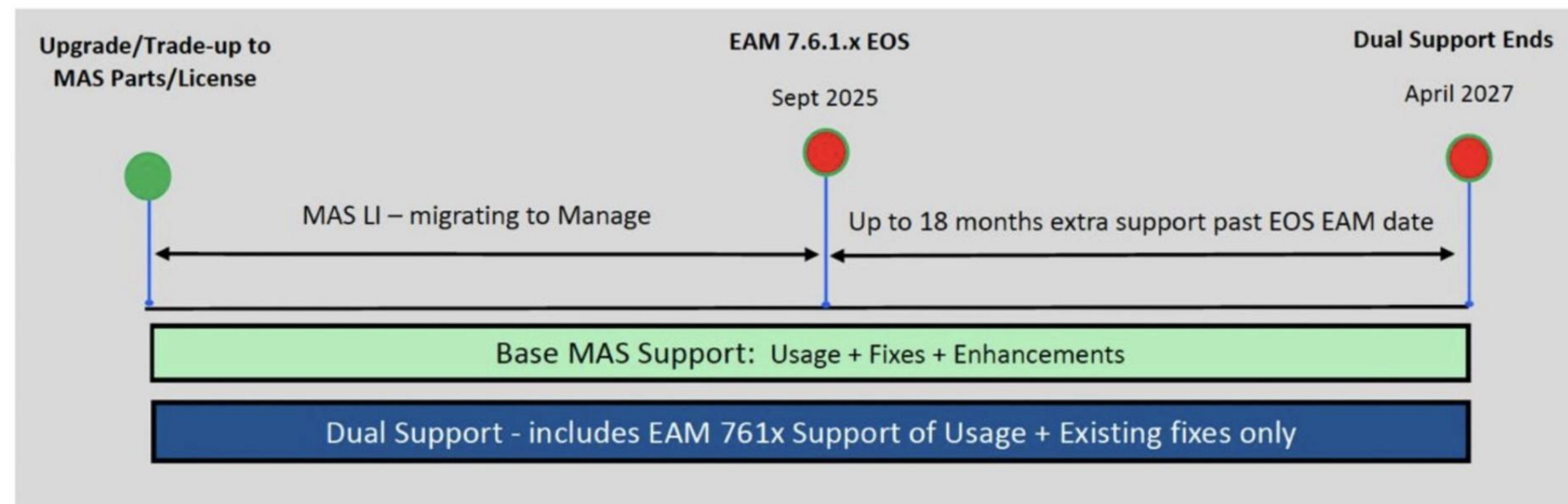**IBM Sustained Support:** Enables clients to continue to get support for "how to" questions, usage issues, and known defects published in IBM Fix Central after IBM standard/extended support ends for 7.6.1.x.
IBM Sustained Support does not include support for new defects or new security fixes.

Effective 30 April 2027, **dual** support under the MAS license for EAM will no longer be available.
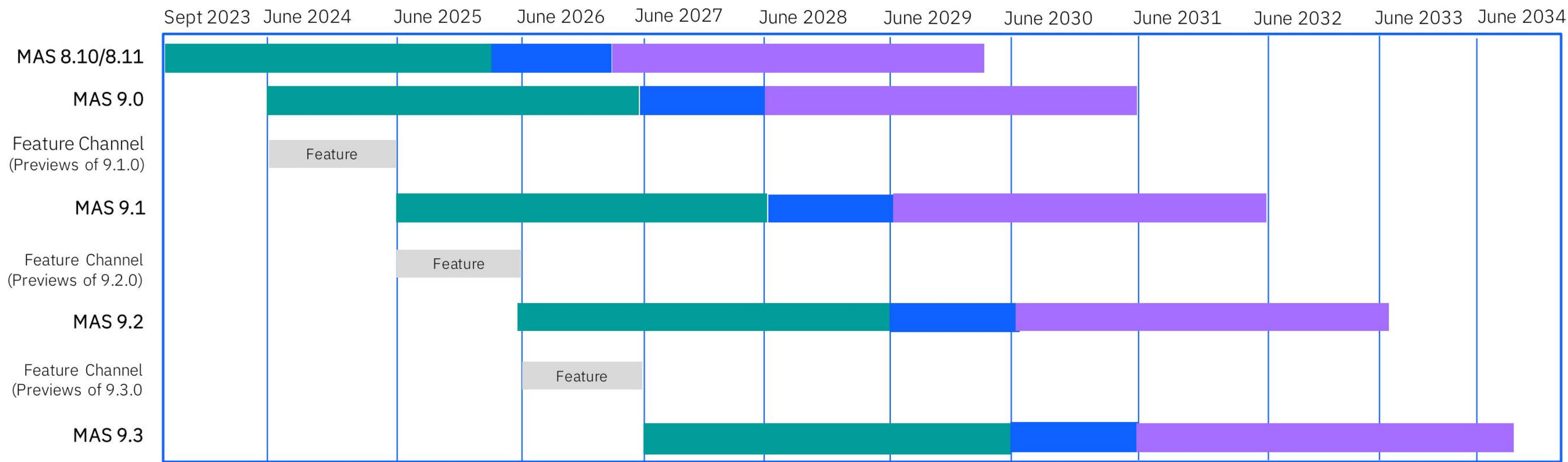
Dual Entitlement

Customers on Maximo Application Suite License Agreement
Maximo EAM 761x Dual Support in MAS

- For customers that have moved to MAS parts and LI commercially and are in the process of migrating to Manage.

- **Dual Support for both EAM 761x and MAS 8.x/9.x up to 18 months past EAM EOS date.**
  - **NOTE: Customers must move to Manage by April 2027 date if support for both platforms is required.**

- EAM 761x Support access is for usage and existing fixes only
  - Available for the last supported version and fix pack

- No new MAS or EAM part purchase is required – IBM is offering this service for our customers to help them during this migration process as part of the S&S of the MAS parts purchased.

Upgrade/Trade-up to MAS Parts/License	EAM 7.6.1.x EOS Sept 2025	Dual Support Ends April 2027
	MAS LI – migrating to Manage	Up to 18 months extra support past EOS EAM date

Base MAS Support: Usage + Fixes + Enhancements

Dual Support - includes EAM 761x Support of Usage + Existing fixes only
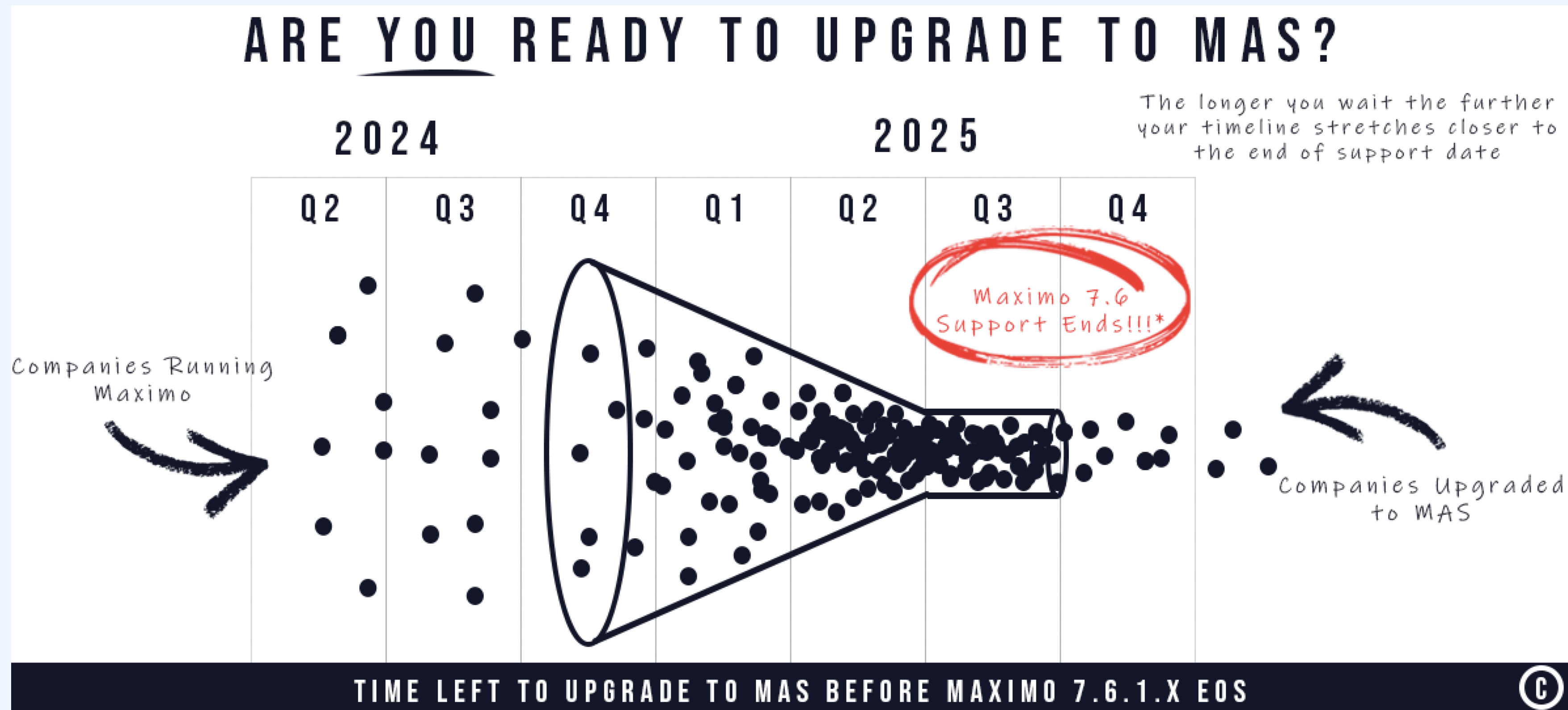
Time is Running Short!

15 months left of Standard Support

Approx. 2500 NA Maximo Clients

Limited Red Hat Open Shift Container Platform Skill Set/Professionals

Only a small number of consulting firms have the needed skills and experience- If you're not upgrading yourself, find an IBM Business Partner NOW!

Upgrade Readiness

Perform a MAS Upgrade Readiness Assessment

What version are you currently on?

- Upgrade from 7.6.0.10, 7.6.1.2 or 7.6.1.3
- Are you running FedRAMP Authorized version of 7.6??
- Run Integrity Checker in REPORT mode, not REPAIR mode

Which MAS apps will you implement?

- Manage? Health? Monitor? Predict? Maximo For IT*
- Do you need to replace legacy work centers?
- Consider your mobility strategy in light of Maximo Mobile and other 3rd party
     mobility solutions

What license types will you need?

- Limited? Base? Premium?
- Concurrent versus Authorized/reserved

How many AppPoints are required?

- Review existing user permissions and access
- Utilize AppPoint tooling in legacy Maximo to estimate MAS AppPoint requirements

Upgrade Readiness

Where to deploy?
- On-prem?
    - Do you have necessary Red Hat skills?
    - Review hardware sizing and adjust for increased resource requirements
- Time to move to the Cloud?
    - Which Cloud?
    - Security, Backup, availability, Disaster Recovery offerings
    - Cloud versus Managed Services

Review Integrations
- MAS uses API keys for web-based interactions-may require changes in integration(s) authentication and construction methods
- Java extensions to Automation scripts?

Customizations
- Review and determine if need to be modified or replaced with new function or automation scripts

Reporting
- Start upgrade at 7.6.1.3 if using complex BIRT reports

Upgrade Readiness

Is this the time to review your data and archive?

Could a fresh install be more beneficial than upgrading?

Do you have all the right stakeholders in the room?

Have you verified all your 3rd party solutions are MAS compatible?

Have you scoped out the upgrade Level of Effort (LoE)?

Do you have a plan for user acceptance and training?

What are your testing & validation requirements/scope?

Do you need a sandbox environment for users, others?

Do you have a Post Go Live Support plan?

<u>Have a clear, defined upgrade project plan!</u>

The Licensing Model for MAS has completely changed

- Your existing licenses convert to a pool of AppPoints

- AppPoints can be Authorized or Concurrent User Licenses

- Real-Time License Usage is now tracked and enforced

- What do you need? How do you tell?

- Run MAS License Utilities

- Authorized vs. Concurrent Users

- All new Functionality requires AppPoints

IBM or your license provider can provide a quote for your AppPoint conversion

MAS AppPoint License Model

USER TYPES	Self Service	Limited	Base	Premium
Administration Users (*Authorized*)	N/A	N/A	10 AppPoints	15 AppPoints
Application Users (*Concurrent*)	0 AppPoints	5 AppPoints	10 AppPoints	15 AppPoints
Application Users (*Authorized*)	0 AppPoints	2 AppPoints	3 AppPoints	5 AppPoints

Applications	**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)
		Manage 3 Modules:
		• Manage (Linear/Calibration/Spatial)
		• Manage Industry Solutions
		• Manage Add-ons
		• IT
		• Maximo Mobile
		• 3rd Party Mobile
		
		Monitor
		Assist
			Manage
			Includes:
			  • Linear
			  • Calibration
			  • Spatial (requires install)
			  • Scheduler
			• IT
			
			Health
				Manage
				Industry Solutions
				• Oil & Gas, Aviation, Transportation, Utilities, Nuclear, Civil Infrastructure
				Add-ons
				• Asset Configuration Manager, Service Provider, Health Safety & Environment Manager
				Predict
				Visual Inspection (requires install)

Install AppPoints (*Production Only*)	SAP/Oracle/Workday Connectors (80)	Civil Infrastructure (50)	Visual Inspection (45) Edge (1)	Spatial (20)	Optimizer (60) / (220)	Location Service for Esri (150) / (220)

MAS 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	•Maximum operational flexibility
Hyperscalers Customer Managed	Now AWS Azure IBM Cloud	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	•Simplifies procurement and deployment •Allows client to select their Hyperscalers •Flexibility for clients to manage and operate their environment
	Now AWS Azure	Paid (Marketplace listing) Client purchases software and infrastructure from Hyperscalers		
SaaS Editions IBM Managed	Now AWS	Client purchase single part (includes software, infrastructure, and operations) from either std IBM sales/channels or AWS Marketplace Essentials Standard Premium	IBM provisions, manages, and operates Client's MAS environment on AWS Cloud using IBM's AWS cloud account Provides a base implementation of Manage or MVI. Limited configuration. Provides full MAS Capability, with limited options and operational options Full MAS with more flexibility.	Reduced time-to-value Reduced operational costs Allows clients to focus on business priorities Entry Level for small implementations. Targeted at most clients requiring MAS and wanting to focus on standard capabilities. For clients wanting more operational features and flexibility.

What is APM?

- Asset Performance Management (APM) refers to a set of practices and technologies aimed at improving the performance, reliability, and lifespan of critical assets

- APM integrates various strategies, tools, and techniques to monitor and manage the health of assets throughout their lifecycle, from design and installation to operation and decommissioning

- Key Aspects of APM:
  - Condition Monitoring (sensors, diagnostic tools)
  - Predictive Analytics (data and AI to predict failure)
  - Performance Optimization (analysis for inefficiencies)
  - Risk Management (assess risk for repair, replace, upgrade)
  - Reliability-Centered Maintenance (determining maintenance approach based on the reliability of each asset)
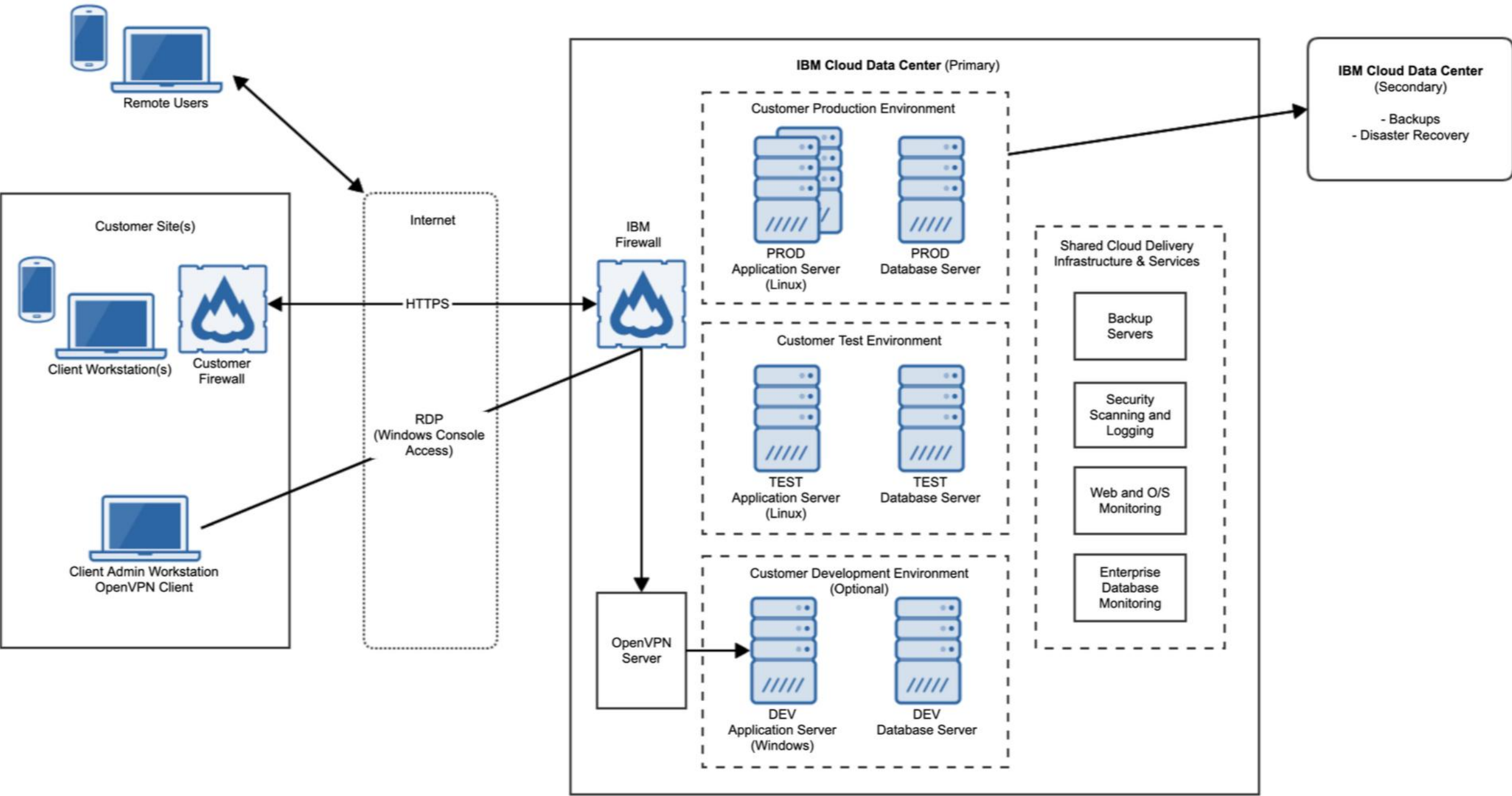 - Data-Driven Decision Making (IT/OT data to make decisions)

Key differences between EAM and APM

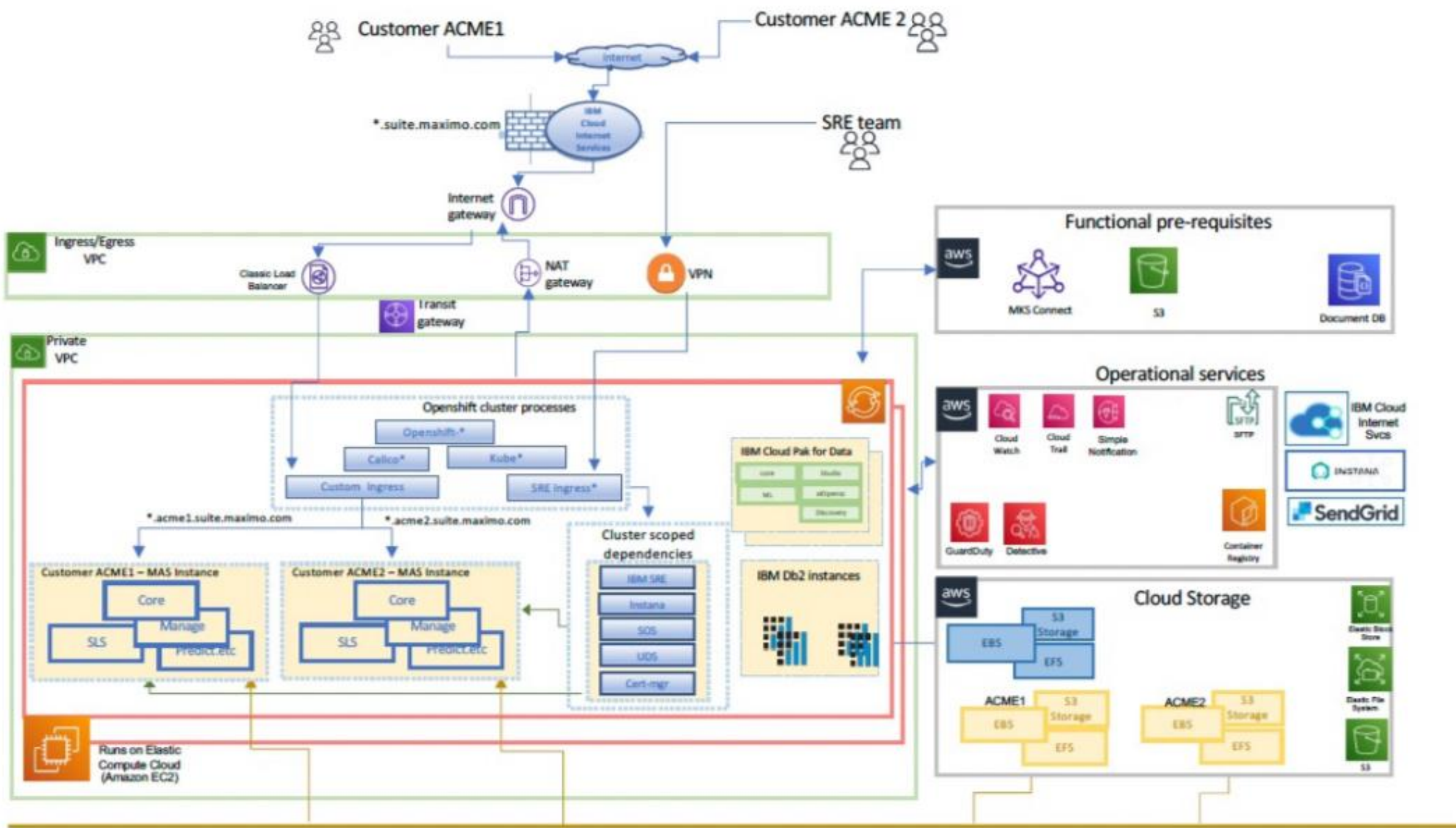|	EAM	APM
Focus	Broader, covering the entire asset lifecycle and focusing on maintenance and operations management	More focused on optimizing asset performance, preventing failures, and improving efficiency using real-time data and analytics
Data Usage	Uses historical data and maintenance records to manage assets effectively	Relies heavily on real-time data, condition monitoring, and predictive analytics to improve asset performance
Objective	Aims to ensure assets are properly maintained and managed throughout their life	Aims to maximize asset performance by preventing unplanned downtime and improving operational efficiency

Useful Links

[Product Lifecycle for Maximo 7.6.1.](#)x

[End of Interim Fixes Maximo 7.6.1.2](#)

[End of Support for Maximo 7.6.1.x](#)

[IBM Subscription & Support Overview](#)

[Upgrading from Maximo Asset Management to Maximo Application Suite](#)

[IBM Community for Asset & Facilities Management](#)

[Maximo Application Suite product Documentation](#)

[MAS Installation, Upgrade, and Deployment](#)

[MAS and Red Hat OpenShift](#)

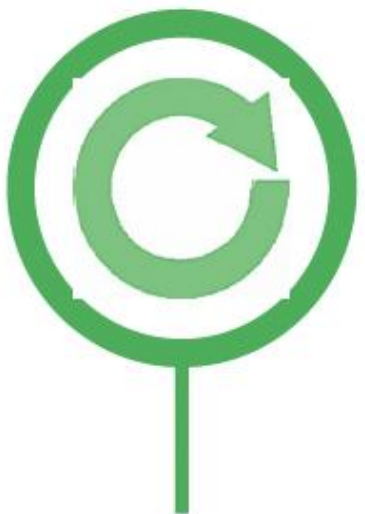[New IBM Support Offerings](#)

[IBM Licensing Terms](#)

Backup

MAS Infrastructure

Legacy Maximo

Maximo Application Suite

Upgrade Tooling

- MAS Infrastructure Sizing
- Customization Tool
- Integrity Checker
- AppPoint calculator utility
- AppPoint 'Magic' scripts

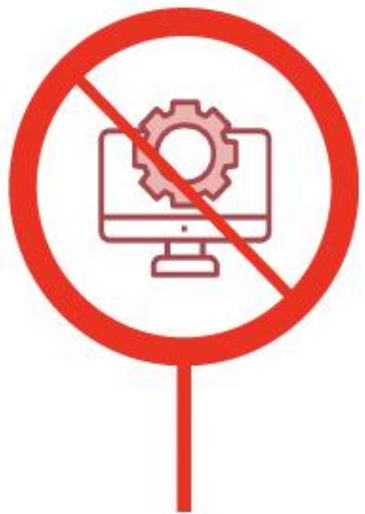# Maximo 7 Extended Support Year 1   *(9/30/25-9/30/26)*

Support for routine Usage and How-to questions

Provide existing code patches and fixes

Critical/Severity 1 defects in the first year (cumulative fix)

No new patches will be provided

Access to documentation, technotes & other online product material

Unlimited number of technical support incidents

No new proactive security fixes will be provided

No new features or enhancements

Basic Troubleshooting

Standard SLO's apply (example 24x7 severity 1)

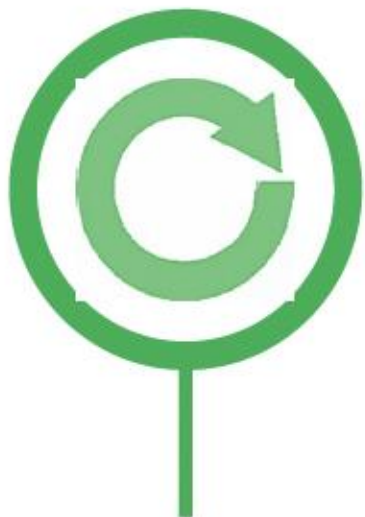No new development analysis of new defects (excluding Sev1 in 1st year)

No support for Supporting Programs and 3rd part components

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Maximo 7 Sustained Support 5 Years   *(Through 9/30/30)*

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