Welcome to
Niagara Falls

NEW YORK STATE OF OPPORTUNITY. | NY Power Authority

NORTHEAST
MAXIMO USER GROUP

VISION 2030

Best in Class Asset Management

How NYPA uses sound Asset Management Principles and Maximo to better Manage our Assets and Meet the Requirements of ISO 55001

Who We Are

NYPA **VISION** 2030

STRATEGIC PRIORITIES

Preserve and enhance the value of our hydropower assets as a core source of carbon-free power and of flexibility and resilience as the state's grid evolves

Be the leading transmission developer, owner, and operator for New York State and its changing needs

Pioneer the path to decarbonization by acting as a test-bed for innovation while ensuring reliability, resilience, and affordability of the state's energy grid

Partner with our customers and the state to meet their energy goals in alignment with CLCPA[1] by providing clean and affordable energy along with innovative customer solutions

Repurpose the New York Canal System for the economic and recreational benefit of New Yorkers while driving operational efficiency

FOUNDATIONAL PILLARS

Digitization

Environment, Social, and Governance

Diversity, Equity, and Inclusion

Enterprise Resilience

Resource Alignment

The Institute of Asset Management

What is Asset Management?

Asset Management - the coordinated activity of an organisation to realise value from assets

www.theIAM.org

theIAM.org/BigPicture

ASSET MANAGEMENT AT NYPA IS:

- Leveraging technology and data to better monitor asset performance
- Shared decision-making informed by data
- A focus on continual improvement
- Optimizing customer value

NYPA supports the ISO 55001 standard for generation and transmission

ASSET SAVVY

Issues • Actions • Results

2014

NYPA's Strategic Vision established

Asset Management Priority set

2015

Organizational gap analysis completed

Roadmap created

2016

Strategic Asset Management Plan And Regional Asset Management Plans created

Initial Asset Management Projects completed

iSOC piloted

2017

Asset Management Objectives defined

iSOC expanded

EMBED PROCESSES & SYSTEMATIC ASSET MANAGEMENT CULTURE

2018

Asset Management Policy and Governance established

Asset Management Plans continue to Be defined

Asset Savvy Communications campaign launched

2019

ISO 55001 Certification

2020 - 2021

Surveillance Audits

Continuous Improvement

Covid Response using ISO framework

2022

ISO 55001 Recertification

Why Maximo

Maximo allows us to store, organize, track, and evaluate large amounts of asset maintenance information, creating a defined workflow for both record keeping and informing smart business decisions

New Uses for Maximo

Street Lighting

Work Order Tracking

Job Plans

Crafts

Purchase Requisitions

Facilities

Service Requests

Mail Room

Printing Requests

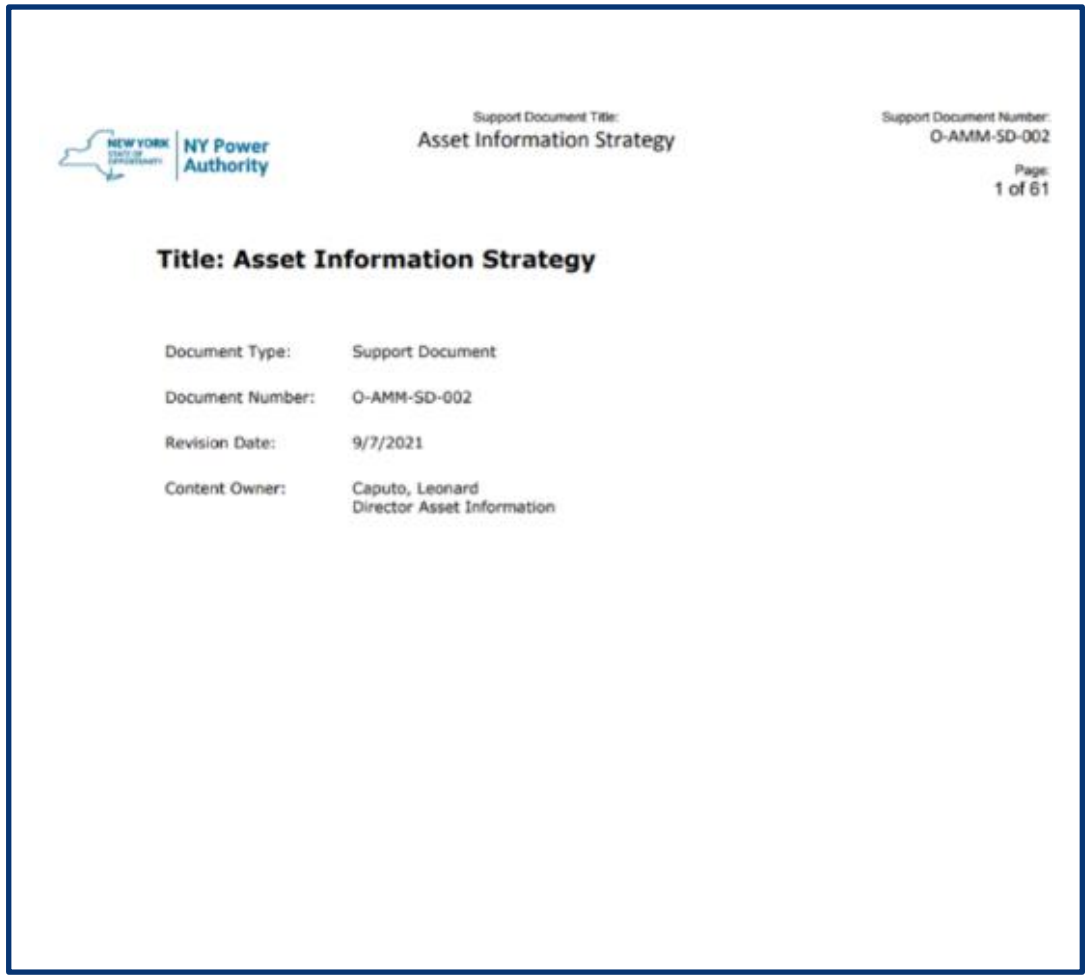
Evolve New York

Assets

Compliance

PRC / CIP Requests

Asset Information Strategy



NY Power Authority

Support Document Title:
Asset Information Strategy

Support Document Number:
O-AMM-SD-002

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Title: Asset Information Strategy

Document Type:	Support Document
Document Number:	O-AMM-SD-002
Revision Date:	9/7/2021
Content Owner:	Caputo, Leonard Director Asset Information

- **Purpose**:
  - Defines the Asset Information Strategy and requirements as well as the scope of asset information, consisting of structured and unstructured information.
- **Highlights**:
  - Vision, principles and objectives
  - Asset Information Scope
  - Current state
  - Asset Information Needs, Opportunities and expectations of stakeholders
  - Future state
  - Milestone activities that support the implementation roadmap
- **Subject to continual improvement:**
  - V5 approved Sept 2021

Managing our Data as an Asset

Treating data like physical assets to maximize value and drive better outcomes for NYPA and its customers

NYPA's Enterprise Data is growing exponentially

Nearly 2 Petabytes by 2020

NYPA's entire strategy & significant investments depend on data

Customer Digital Experience, Sensor Deployment, Asset Performance management

Seamless interoperability is becoming the key to success

Enterprise Analytics Platform, Cloud-first Environments

Data Governance enables an organization to optimize, protect, and leverage all data as an enterprise asset. It is a system of accountability designed to enforce proper management of data assets and the performance of data functions. It succeeds by:

- Making data available and easily accessible
- Establishing consistent definition of data (especially when shared)
- Providing data transparency and traceability (knowing where the data came from)
- Trusting the quality of our data
- Keeping our data safe and secure
- Enabling automation of data processes (collection, transformation, reporting)

Quality Audit Program

NYPA has established an organizational position for Maximo Data Quality

Responsibilities include:

- Defining quality audit procedures
- Performing quality audit and reports
- Remediation and follow-up as appropriate

NYPA has developed a **Data Quality (DQ) Visualizer** tool to support data quality audits

Iterations of the tool are being rolled out on a priority basis as follows:

- MVP 1 (minimum viable product) = Asset Register **Currently in Use**
- MVP 2a = Work Orders **Q3 of 2022**
- MVP X = Consideration for systems / information beyond Maximo and SAP

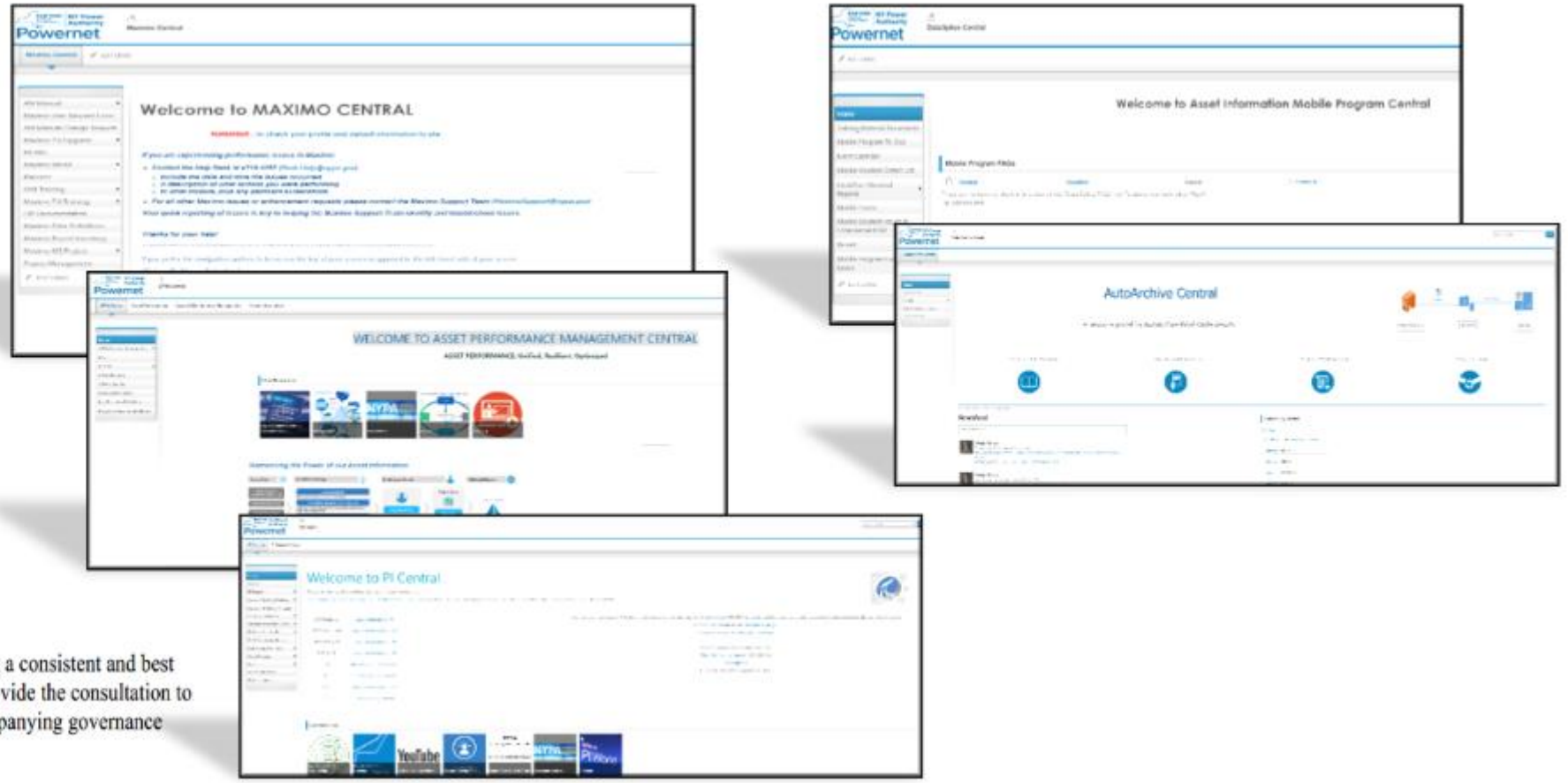
Asset Information Systems Continual Improvement

Asset Information Systems Governance

NY POWER AUTHORITY

EXELE SOFTWARE AND CONSULTING SERVICES

PI SYSTEM CONSULTING SERVICES



II. Summary of Proposed Services

In response to the NY Power Authority's requirement for implementing a consistent and best practice approach to the usage of its PI System, Exele is prepared to provide the consultation to help define an enterprise-wide PI System solution and create the accompanying governance structure (policies, procedures, and supporting process flowcharts).

Asset Maintenance Manual

Type	Document No. ↑	Rev No.	Title
	O-AMM-20-002	2	Lifecycle Maintenace of Asset Maintenance Management Procedures
	O-AMM-20-003	2	Maintenance Programs
	O-AMM-20-004	8	Work Order (WO) Planning
	O-AMM-20-005	2	Maintenance Scheduling Requirements
	O-AMM-20-006	6	Planned & Forced Outage Maintenance Scheduling
	O-AMM-20-007	3	Asset Creation and Disposition
	O-AMM-20-008	4	Failure Analysis
	O-AMM-20-009	2	Process Audits
	O-AMM-20-010	4	Measurement and Test Equipment (M&TE)
	O-AMM-20-011	4	Good Maintenance Work Practices
	O-AMM-20-012	4	Tool and Equipment Control
	O-AMM-20-013	2	Item Creation and Disposition
	O-AMM-20-014	3	Asset Performance Improvement Program
	O-AMM-20-016	3	Project Turnover Procedure
	O-AMM-SD-004	1	Utility Operations Critical Infrastructure Protection (CIP) A...
	O-AMM-SD-005	1	Critical Infrastructure Protection (CIP) Requests and Work Or...
	O-AMM-SD-007	1	Asset Register Standard
	O-AMM-SD-008	2	Failure Reporting Standard
	O-AMM-SD-009	2	Job Plan Standard

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Procedure Title:
Maintenance Programs

Procedure Number:
O-AMM-20-003

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Title: Maintenance Programs

Document Type:	Procedure
Document Number:	O-AMM-20-003
Revision Date:	9/22/2021
Final Approver:	*DaSilva, Ricardo* VP Strategic Operations
Content Owner:	Caputo, Leonard Director Asset Information

Asset Information Training & Certification

Asset Information Systems Training

Asset Information Governance Training (AMM)

Asset Work Management Committee

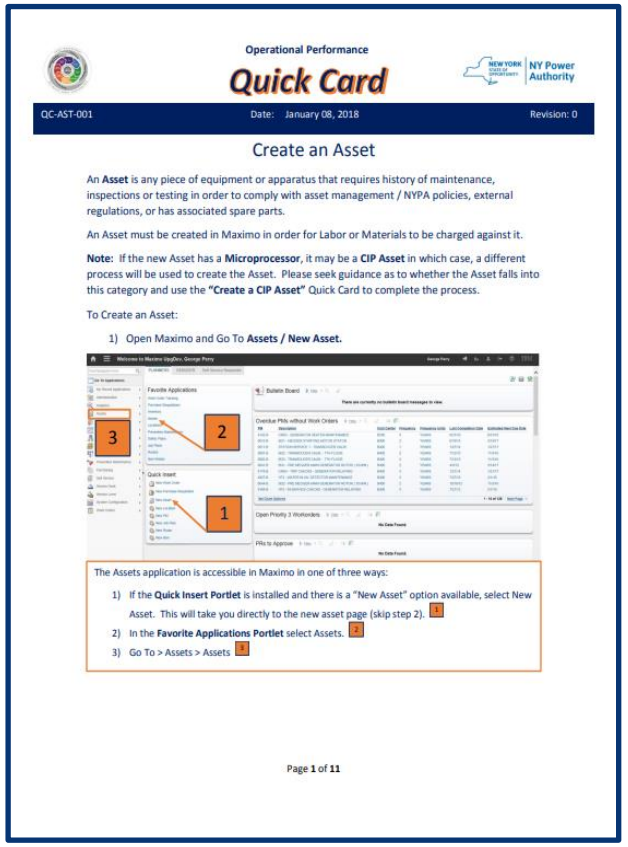
Biannual Planners Conferences

MUWG Planner Scheduler Certification Training (30)

Institute of Asset Management Certifications

- Certificate (35)
- Diploma (7)

Training



Operational Performance

Quick Card

NY Power Authority

QC-AST-001 | Date: January 08, 2018 | Revision: 0

Create an Asset

An **Asset** is any piece of equipment or apparatus that requires history of maintenance, inspections or testing in order to comply with asset management / NYPA policies, external regulations, or has associated spare parts.

An Asset must be created in Maximo in order for Labor or Materials to be charged against it.

Note: If the new Asset has a **Microprocessor**, it may be a **CIP Asset** in which case, a different process will be used to create the Asset. Please seek guidance as to whether the Asset falls into this category and use the **"Create a CIP Asset"** Quick Card to complete the process.

To Create an Asset:

1) Open Maximo and Go To **Assets / New Asset.**

The Assets application is accessible in Maximo in one of three ways:

1) If the **Quick Insert Portlet** is installed and there is a "New Asset" option available, select New Asset. This will take you directly to the new asset page (skip step 2). 1
2) In the **Favorite Applications Portlet** select Assets. 2
3) Go To > Assets > Assets 3

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Asset Maintenance Manual

2020 Update Training

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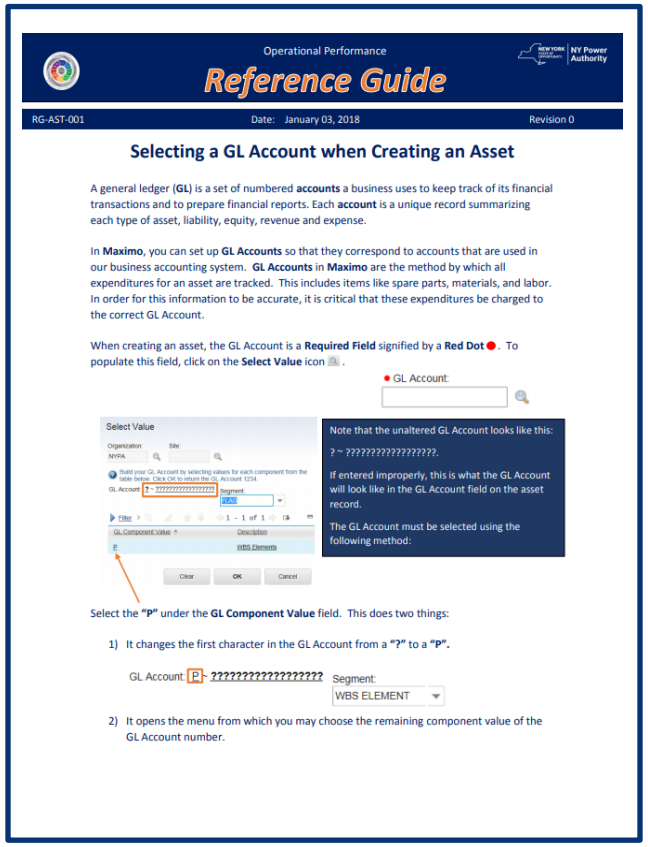
Instructor Led Training



Operational Performance

Reference Guide

NY Power Authority

RG-AST-001 | Date: January 03, 2018 | Revision 0

Selecting a GL Account when Creating an Asset

A general ledger (**GL**) is a set of numbered **accounts** a business uses to keep track of its financial transactions and to prepare financial reports. Each **account** is a unique record summarizing each type of asset, liability, equity, revenue and expense.

In **Maximo**, you can set up **GL Accounts** so that they correspond to accounts that are used in our business accounting system. **GL Accounts** in **Maximo** are the method by which all expenditures for an asset are tracked. This includes items like spare parts, materials, and labor. In order for this information to be accurate, it is critical that these expenditures be charged to the correct GL Account.

When creating an asset, the GL Account is a **Required Field** signified by a **Red Dot** ●. To populate this field, click on the **Select Value** icon .

● GL Account:

Select Value

Note that the unaltered GL Account looks like this:

? ~ ??????????????????.

If entered improperly, this is what the GL Account will look like in the GL Account field on the asset record.

The GL Account must be selected using the following method:

Select the **"P"** under the **GL Component Value** field. This does two things:

1) It changes the first character in the GL Account from a **"?"** to a **"P".**

GL Account: P ~ ?????????????????? Segment: WBS ELEMENT

2) It opens the menu from which you may choose the remaining component value of the GL Account number.

Set Up For Success

Planner Onboarding Program

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Bi-Annual Planners Conference

Asset Work Management Committee

MUWG

MAXIMO UTILITY WORKING GROUP

Planner Scheduler Certification

Level 1

Introduction to Planning & Scheduling

MUWG

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MOBILE USER GROUP FOR MAXIMO

The Institute of Asset Management

EPRI

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