

IBM Maximo

West Mountain Maximo Users Group (WMMUG) 2026

Maximo Application Suite

Maximo for Oil & Gas / HSE 9.2 Roadmap session

Jaime Geil

Maximo Product Management

2026



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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.

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The development, release, and timing of any future features or functionality described for our products remains at our sole discretion.



Contents

- What's Maximo O&G/HSE
- What's new in 9.0 & 9.1
- What's being released this June (9.2)
- Demo videos
- Future Roadmap

Safety signs are all around us.

*The real question is—
are we paying attention?*



Oil & Gas Site Incident

A major oil company had multiple safety and maintenance systems running separately. During a routine operation, *a hazard was detected but not communicated effectively across teams*. The disconnected systems delayed corrective action, resulting in a costly explosion.



Manufacturing Plant Near-Miss

At a large manufacturing facility, safety audits revealed several near-miss incidents. However, *these audit findings were manually recorded and not connected to daily work plans*. As a result, critical risks were not mitigated in time, nearly causing a severe injury.



Construction site accident

A construction company used separate compliance and safety software. *Risk assessments were often incomplete and not linked to job execution plans*. This gap contributed to a fatal accident on site.



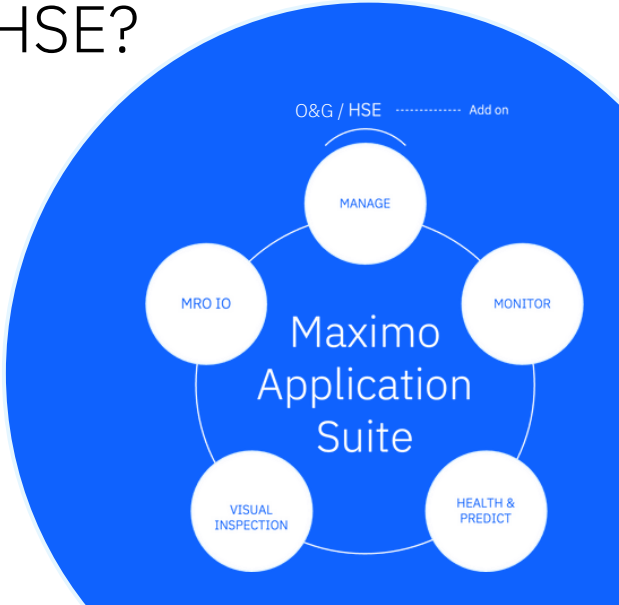
Chemical Plant Fire

In a chemical processing plant, safety and operations teams relied on manual communication and handoffs. *After a detected leak, delays in scheduling maintenance caused a fire that severely damaged the facility*.

What is Maximo O&G/HSE?

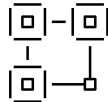
Maximo Oil and Gas / HSE

Is an add-on solution to IBM Maximo Manage that enhances core asset management capabilities by adding and integrating critical health, safety, and environmental processes. It helps organizations to proactively manage operational risks, ensure regulatory compliance, and promote a safer work environment by strengthening both process safety and workplace safety practices.

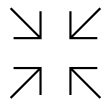


SAFETY FIRST

STARTING WORK
IS NOT
THE FIRST STEP



Comes with a flexible licensing model based on MAS 'app points'



Existing Maximo infrastructure and administration capability can be leveraged for HSE applications : Servers | System administration | Training

An integrated HSE + Work Management approach ensures that safety is not an afterthought, but a built-in component of every job.

Solution Overview

Business Processes and modules

Operations management	Control of work	Asset & work management	HSE management	Compliance	Change management	Knowledge management
Manage operator logs	Risk Management	Asset management	Incident Management	Regulatory Compliance	Management of Change	Capturing Knowledge
Shift handover	Permit to Work	Defect Management	Investigation Management	Managing non-conformance	Continuous Improvement	Identifying Solutions
Operator Rounds & Inspections	Isolation Management & LoTo	Work Management	Managing Corrective Action	Audit Management		Checklist Management
Operator Tasks	Access Permits	Turnaround management	Certification, regulatory permits and environmental Consents	Resource Management		Lessons Learned
Managing Operational Actions	Lock Management	Failure management	Emission Management	Training and Competency Management		
Define operating policies and procedures	Hazard Management	Construction and Commissioning Management	Mobile Incident Reporting	Managing Supply Chain Quality		
Production loss reporting	Bypass Management			Manage Configuration Items		

Summary of new features introduced in HSE 9.0

- **Emission details on Incident Events**
- **Enhanced emission details on Location Meters**
- **New 'View Emissions' action on Locations**
 - **View Continuous Emissions**
 - **View Fugitive Emissions**
- **Emissions Management Operational Dashboard View**
- **Inspections integration on Operator Log / Access Permits**



New Mobile Incident Reporter

New Mobile application enabled by Maximo O&G/HSE license. Self-service licensed



Mobile Inspections integration

Added Mobile Inspections integration in **two new modules**:

- **Incidents**
- **Audit & Surveys**



Emissions Profile

Same emission profile existing in Locations (Oil) has been **included in Assets (Oil) application**. User can now capture **continuous emissions** amounts for assets and locations.



Emissions tracking in Create Incident application

Users are now able to **track fugitive emissions in Create Incidents**, self-service application



Usability Enhancements

Incident Events added into More Search Fields

Addition of Location and Environmental action type into Action Tracking

Usability enhancements in Defects application

MAS 9.2



Contractor Safety

Maximo’s new Contractor Safety capability expands on the core Companies application. Delivers a comprehensive and purpose-built approach to **managing third-party safety performance**. Provides a centralized view of **contractor compliance, required certifications, incident history, and incident working-hour totals**.



Incident categorization and similarity identification with AI

Incidents module is now receiving **AI-generated insights for populating Incident Type and Incident category**. Users can identify trends of similar incidents quickly and act on it preventing a more dangerous situation.



Mobile Permit to Work

Field workers will be able to **request a Permit to Work remotely**, using mobile devices when in need of specific approvals for risky activities.



Mobile Incident Reporter

Continuing to improve the mobile incident reporting capability, we’re **adding map functionalities** that will allow users to create a new incident by long-pressing a specific area in the map or clicking on an asset/location being displayed in the map.



Mobile Inspections integration enhancements

Inspections are **now part of Risk Assessments and MOC workflows**, along with other areas like Incidents, Access Permits, Operator Rounds and Audits & Surveys. On top of that, we’re **adding assignment capability in all the areas where there’s an integration with Inspections**. Also, in accordance with core Inspections move, it’s becoming an Org/Site level function across all O&G/HSE modules.



GHG/CO2e Emissions calculation

O&G/HSE contain **emission capturing mechanisms for Fugitive Emissions (Incidents) and Continuous Emissions (Asset and Location)**. It was able to manually capture emission amounts, but converting it into GHG/CO2e amounts had to be done manually or third-party tool. **Envizi provides now an API that can calculate those values live** based on emission type and amount.



Waste Management

Maximo’s waste management capabilities address a critical element of environmental functionality with a deep, asset centric solution that supports all waste types. Including **tagging waste generating assets or locations, defining waste types, capturing required permits and certificates, linking disposal plans with vendors, supporting inspections** and more.

Contractor Safety

Administration | Report Admin

Quick Insert

- [New Person](#)
- [New User](#)

Security, Users and Groups

- [Users \(Manage\)](#)
- [Security Groups \(Manage\)](#)
- [People](#)
- [Person Groups](#)

Workflow Configuration

- [Workflow Designer](#)
- [Roles](#)
- [Actions](#)
- [Communication Templates](#)
- [Workflow Administration](#)
- [Escalations](#)

Reporting

- [Report Administration](#)
- [KPI Manager](#)

Bulletin Board

Filter > 🔍 🗑️

Subject	Message	Post Date	Expiration Date	Viewed
				N

There are currently no bulletin board messages to view.

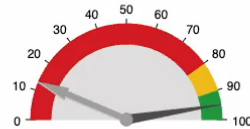
Inbox / Assignments

No Assignments found for Mike Wilson

PM vs CM Work - All Work Orders (%)

Last Run: 8/3/04 3:05 PM
PM Performance (%)

[Update](#)



Status	KPI	Actual	Target	Variance
↓	PM Performance (%)	12.73	95	-82.27

Bedford Work Orders

Filter > 🔍 🗑️ ⬇️ 📄

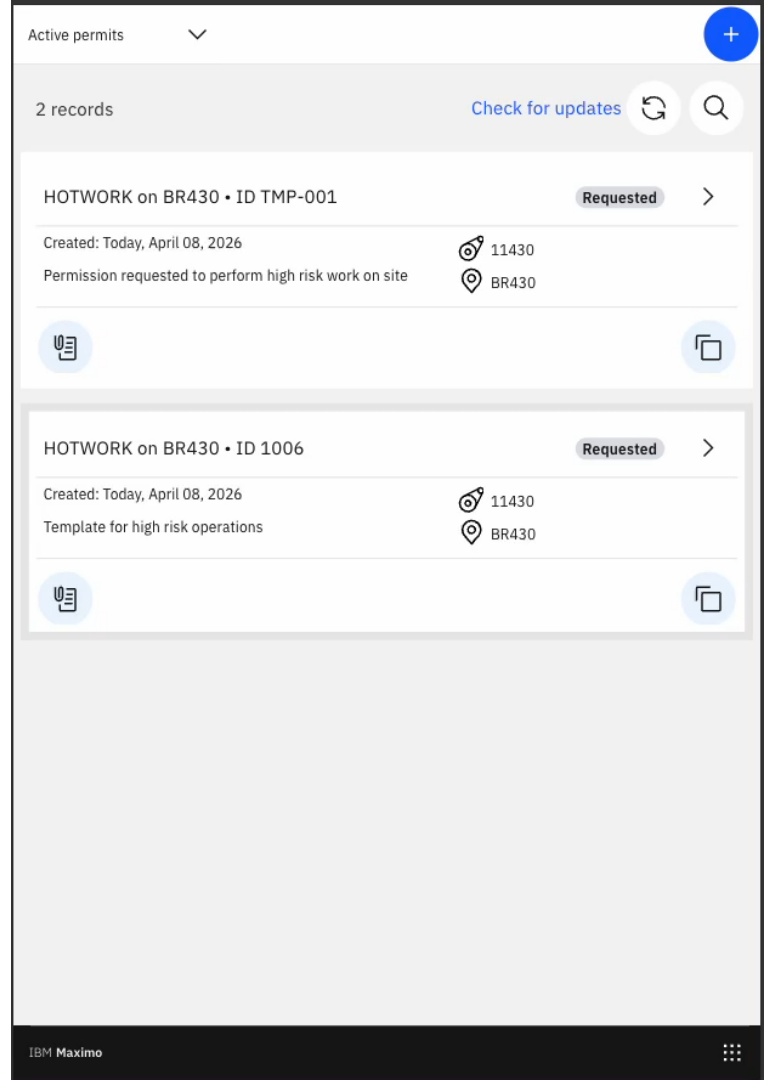
Chart Type: **BAR**
X (By Priority)



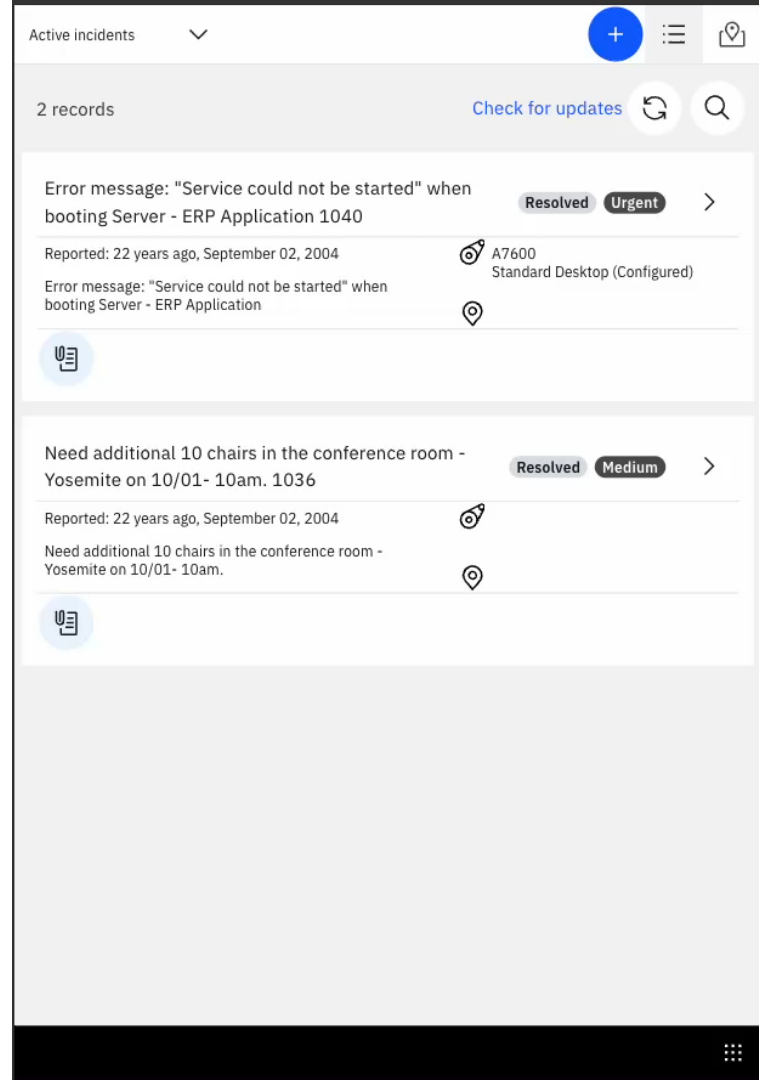
View By: **Priority**

Priority	Count	Percent (%)
1	78	14.47
2	94	17.44
3	60	11.13
4	137	25.42
5	58	10.76
6	9	1.67
7	0	0.00

Mobile Permit to Work



Mobile Incident Reporter



Incident categorization and similarity identification with AI

Tickets

Create ticket +

Results: 5 View: Public Default view

Search: inc-ai

<input type="checkbox"/>	Ticket	Description	Reported by	Priority	Status	Owner	Owner group	Class
<input type="checkbox"/>	INC-AI-2	Belt system stopped...			NEW			INCIDENT
<input type="checkbox"/>	INC-AI-3	HVAC system pressu...			NEW			INCIDENT
<input type="checkbox"/>	INC-AI-1	Water level droppin...			NEW			INCIDENT
<input type="checkbox"/>	INC-AI-4				NEW			INCIDENT
<input type="checkbox"/>	INC-AI-5				NEW			INCIDENT

Items per page: 10 1-5 of 5 items 1 1 of 1 pages

Incident categorization and similarity identification with AI

Tickets / 1004 / Similar tickets

Similar tickets

The following tickets are similar to ticket 1004.

✔️ **Success**
Status of the selected tickets was updated.

Current ticket

Ticket	Description	Class	Asset	Status	Priority	Owner
1004	Generator Overhaul	ClassName	11300	APPR	HIGH	Clarke

Similar Tickets

<input type="checkbox"/>	Ticket	Description	Class	Reported by	Status	Priority	Owner	Similarity Score
<input type="checkbox"/>	1384	Relocate Guard	ClassName	11300	APPR	HIGH	Clarke	92%
<input type="checkbox"/>	1477	Rebuild Feedwater	ClassName	11300	WAPPR	HIGH	Clarke	87%
<input type="checkbox"/>	1006	Generator Overhaul	ClassName	13140	INPRR	HIGH	Clarke	79%
<input type="checkbox"/>	1285	Feedwater Pump	ClassName	11230	WAPPR	HIGH	Clarke	68%
<input type="checkbox"/>	1370	Paint Guard Rail	ClassName	BR200	WAPPR	HIGH	Clarke	64%

GHG/CO2e Emissions calculation

Incidents (HSE)

Find navigation item <

Available Queries ▾

- Common Actions**
- + New Incident
 - 👤 Change Status
 - 👤 Select Owner
 - 👤 Take Ownership
 - 🕒 Create KPI
 - 📄 Incident in queue
 - 🕒 Incident in progress
 - 🕒 Pending Incident
 - 👤 Resolve Incident
 - 📄 Create Report
- More Actions**
- Attachment Library/Folders ▾
 - Run Reports

Incidents (1 - 20 of 70)

Incident	Summary	Reported By	Priority	Status	Owner
1009	Desktop shows blue screen when turned on.	LIBERI	3	RESOLVED	
1010	Error when printing Excel.	BOYD	3	RESOLVED	SINCLAIR
1011	New employee setup.	MILLER	3	CLOSED	MOTIKA
1012	I need to access ITSM folder in my Outlook. How do I do it?	SMITH	3	RESOLVED	ROWLANDS
1013	DVD Issue on Laptop	BALL	2	PENDING	
1014	Copier/Scanner/Fax not working	STANLEY	4	PENDING	
1015	Keyboard Not Working	MILLS	4	RESOLVED	CALDONE
1016	Request PC and Phone Move	ROGERS	2	CLOSED	
1017	Finance application is down.	LIBERI	1	QUEUED	REYNOLDS
1018	When I try to enter a new Order in the Application the system hangs.	ROBERTS	1	INPROG	
1019	Can't login into Finance Application	NEWTON	1	INPROG	
1020	Finance application is down.	LIBERI	1	INPROG	

[Select Records](#)

Waste Management

Administration Report Admin

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- [New User](#)

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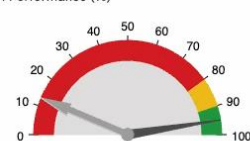
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Bedford Work Orders

Filter >

Chart Type: [BAR](#)
X (By Priority)

View By: [Priority](#)



Bonus Track!

Maximo HSE Maximo Oil and Gas

MAS 9.3



Process Intelligence - AI

Introducing **AI capabilities** to automate process that are currently manually done **like reading regulations and extracting tasks: inspection schedule, training requirements, certifications, etc.** Automating job plan applying into work orders.



Mobile Checklists

New Mobile module related to Maximo O&G/HSE, this will **help technicians to perform all checklists assigned to them using a mobile device**, taking advantage of all Maximo Mobile features – online/offline modes, configurability.



Mobile LOTO

New Mobile application related to Maximo O&G/HSE license, adding up to Mobile Permit to Work application, allowing users to visualize the LOTO steps while reviewing a permit request.



Dashboards and reporting

Predefined charts in Operational Dashboards.
Regulatory reports available out-of-the-box



PTW Map, Signatures and SimOps

New modernized applications to **consolidate ongoing permits in a plant map, allowing identification of simultaneous operations. Centralized view** for reviewers, approvers, issuers, etc. so it's easier to identify each pending signature for the logged user.



Waste Management enhancements

Waste identification and planning in Job Plans and Work Orders, so that **waste and emissions amounts become predictable** and engineers can work on reducing emissions. **Mobile waste management application** is also being considered.

Before we wrap up

Emissions, compliance & Energy monitoring survey



[Scan to take a quick 2-minute survey](#) and share your perspective about Energy Monitoring, Emissions & Compliance

- Learn more about the award-winning performance of IBM Maximo at:

ibm.com/products/maximo

Also more information at the [Knowledge Center](#)

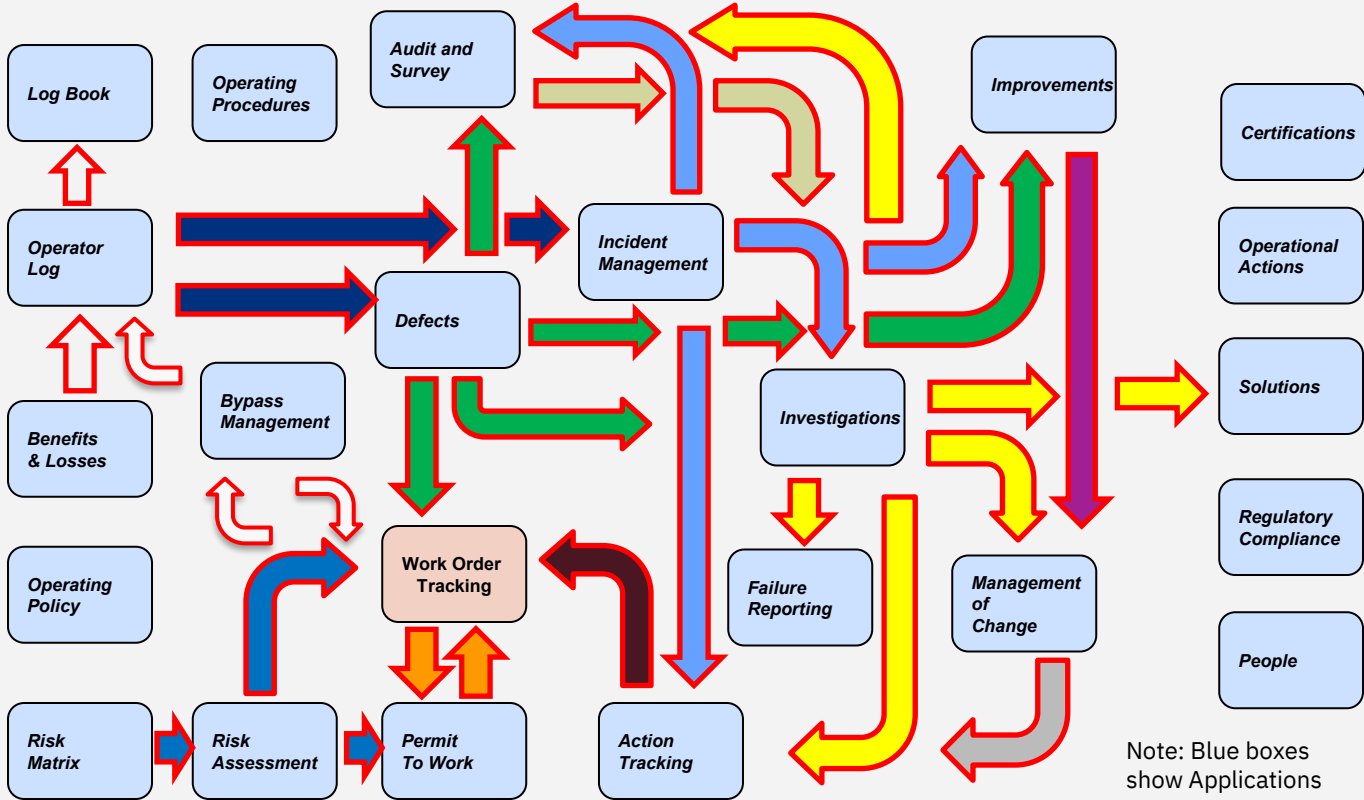
Connect with an IBM expert to start a discussion:

- frcoelho@br.ibm.com
- jaime.geil@ibm.com

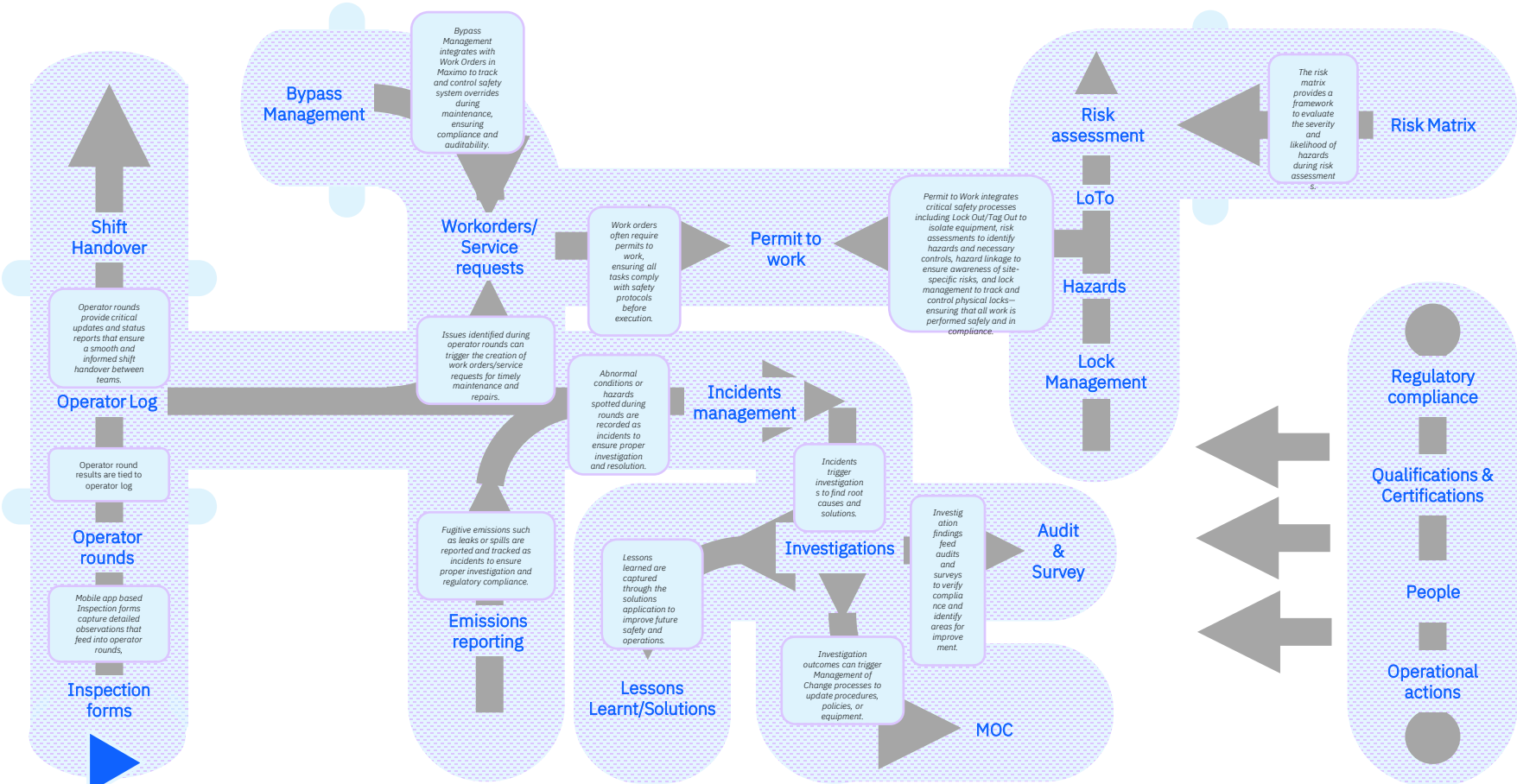


IBM Maximo

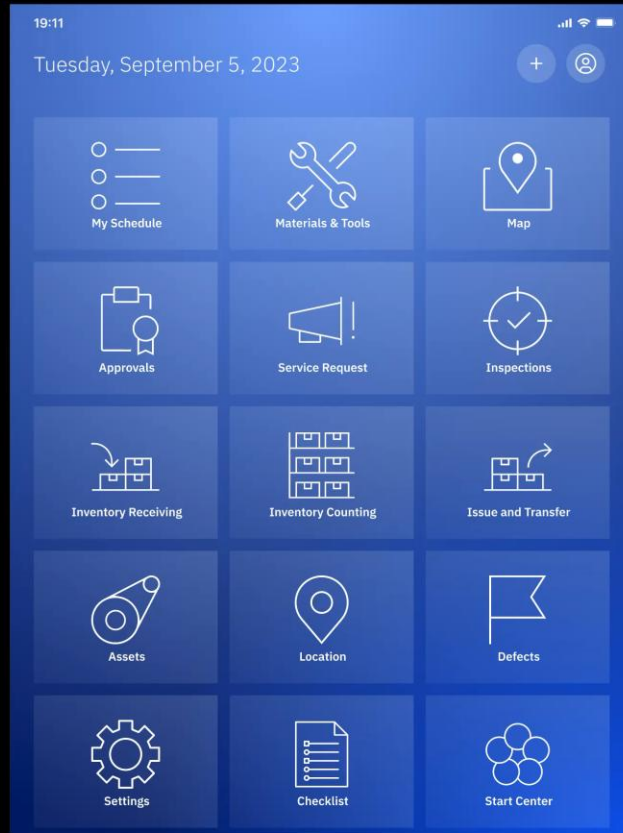
Examples of some of the possible interactions in Maximo HSE 9.1



Interconnected applications



Mobile Checklists



Mobile LOTO

19:11

Active requests ▼ ☰ 📄 +

2 record ↺ 🔍 ⬆️ 🔍

Permit to work on FC HVAC -2330 1006 Requested >

Created: Today, July 30, 2025

MIG welding repairs on mezzanine floor,
Warehouse 3, fixing steel beam cracks

📍 LAP4859
Laptop computer

📍 OFF232
Room 232

📄 📄 🗑️ LOTO 🔍

HOTWORK on BR430 TMP-001 Requested >

Created: Today, July 30, 2025

Template for high risk operations

📍 LAP4859
Laptop computer

📍 OFF232
Room 232

📄 📄 🗑️ LOTO 🔍

Job Plans Intelligence - AI

Incidents (HSE) /
List View /
Work Order Tracking (HSE)

Find navigation item <

Available Queries

Common Actions

- 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
- Create Report
- Unlink GIS Feature
- Delete linked GIS Feature

Work Order Plans Ass

Completions

Completion Stage

Test Type

Job Details

Job Plan

Recommendation + 2 more

- AI BREAKOVER 89%

Job Plan Revision #

PM

Incidents (HSE) /
List View /
Work Order Tracking (HSE)

Find navigation item <

Available Queries

Common Actions

- New Work Order
- Save Work Order
- Clear Changes
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- Initiate Work Order
- Close Work Order
- Create Report
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- Delete linked GIS Feature

Work Order Plans Assignments Related Records Actuals Safety Plan Log Data Sheet Failure Report

Completions

Completion Stage

Test Type

Job Details

Job Plan

Recommendation + 2 more

- AI BREAKOVER 86%

Job Plan Revision #

PM

Last updated 2/14/2024 1:00 pm

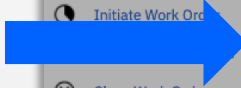
Recommendation

Select a recommended job plan.

Job plan	Description	Confidence
<input checked="" type="radio"/> BREAKOVER	Overhaul breaker	89%
<input type="radio"/> BREAKOP	Operate breaker	79%
<input type="radio"/> BREAKINSP	Breaker inspection	71%

Cancel Apply

Charge to Store? Risk Ass



Regulatory Intelligence - AI

List View / Assets (Oil)

Find navigation item

Available Queries

Common Actions

- New Asset
- Save Asset
- Clear Changes
- Change Status
- Move/Modify Assets
- Swap Assets
- Associate Users and Cust...
- Create Report
- Unlink GIS Feature
- Application Import
- Application Export
- Import Digital Data
- Add/Update Image
- Delete linked GIS Feature

More Actions

- Configure Topology Viewer
- Asset Details
- Report Downtime
- Manage Downtime History
- Add/Modify Linear Referencing ...

1 < Features Relationships Work Zones Service Address **Regulations** Details Audits and Surveys Certifications Work Map Failure Analysis

Asset 11300 Reciprocating Compressor- Air Cooled/100 CFM Site BEDFORD

Regulations (1 - 1 of 1)

Regulation	Description	Regulation Number	Regulation Type	Regulatory Authority
REG1000	49 CFR Parts (190-199) and (100 - 185)	49 CFR	SAFETY	PHMSA and DOT

BMXAA42051 - Record has been saved.

Maximo Assistant 12:46

Regulatory compliance assistance

I see you have associated [Regulation REG100](#) to this asset.

Would you like me to review the regulation and recommend any required actionable items for:

- Preventative maintenance
- Inspections
- Personnel training
- Required permits

You 12:46

Yes

watsonx 12:46 | Reasoning

Analyzing regulation documentation

Type something...

Regulatory Intelligence - AI

Maximo Application Suite | Manage

List View / Assets (Oil)

Find navigation item

Available Queries

Common Actions

- New Asset
- Save Asset
- Clear Changes
- Change Status
- Move/Modify Assets
- Swap Assets
- Associate Users and Cust...
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More Actions

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- Asset Details
- Report Downtime
- Manage Downtime History
- Add/Modify Linear Referencing ...

t < Features Relationships Work Zones Service Address Regulations Details Audits and Surveys **Certifications** Work Map Failure Analysis Calculations Review Actions

Asset: 11300 | Reciprocating Compressor- Air Cooled/100 CFM | Site: BEDFORD

Certificates (1 - 1 of 1)

Select Permit and Certificate Type

Permit and Certificate Type	Description	Category	Status
ELECTACCS1	Access permit for electric components mainte	CERTIFICATE	ACTIVE

Select Permit and Certificate Type | New Row

1 - 1 of 1

AI

watsonx 12:46 | Reasoning

This regulation requires **Permit ELECTACCS1** to be associated to the asset. Would you like me to add the required asset to this asset?

Yes

watsonx 12:47 | Reasoning

Applying ELECTACCS1 to asset

watsonx 12:47 | Reasoning

Task complete, asset saved. **Permit ELECTACCS1** has been the asset. Review the permit by navigating to the [Certifications tab](#) of the asset.

Review certifications tab

Type something...