



Lessons Learned from Maximo 6x Upgrade Project





MAX6 Lessons Learned

Agenda:

1. Context & Background
2. Lessons Learned
3. Questions

Project Team Structure

- Combination – Users/IT/Consultants
- Team makeup
 - Core, Expanded, “Plus”
- Leadership
 - Don/Bill/Sean

Western Support

- Management & Sponsors
- Commitment of funding, time, effort.
- Resources
 - Good people
 - Good contract
 - Workload conflicts

Key Elements of the Upgrade Project

- Gap Analysis
- Business Process Review
- Design/Development
 - Functional Design Reviews
- Testing
- Training
- Implementation – “Go-Live”
- Post Live clean-up (5mos)

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Planning

- Don't cut short
- Project Plan and related document
- Realistic estimates
- Involvement of team

*Plans are worthless;
planning is critical*

-Eisenhower



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What Went Well

Communication

- Integral part of project
- Methods
 - E-mail, Conf calls, Face-to-Face meetings
 - Status Reports
- Group Input
- No surprises
- Building up good will



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What Went Well

Training

- Immersion Training – Core Team
- Maximo Wednesdays – Topics of Interest
- Subject Matter Expert Training – Super Users
- User Training
- Excellent Training Materials



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What Went Well

Other Positives

- TRM's Knowledge of Maximo
- Project Leadership
- Development Partnership
- Cookbook for Go-Live
- Rules Manager

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Not So Well

Improvements

- Did not emphasize interface design early enough
- Not enough interface transaction testing
- Test migrated records as well as new
- Lack of input for Oracle Financial transactions
- Database instances built late
- Underestimated report tasks
- Lack of expertise – competing needs
- Stability problems following Go-live



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Rules Manager

- Bypasses need to change core programming



Overview of Rules

- ▶ Customized auditing
- ▶ Front End Edits on 23 apps including:
 - ▶ Assets, Companies, Inventory, Issues and Returns, Locations, PO, PR, Workorders
- ▶ Created 28 Valuelists
- ▶ JS Libraries to support rules
- ▶ Custom Apps to support DataSplice, Automating creating POS from GSA and Citibank, Transfer Labor Application

Audit Tab on Assets

Assets DEVELOPMENT Go To Reports Start Center Profile Sign Out Help

Find: Select Action

List Asset Spare Parts Safety Meters Owners **Change History** Compliance Specifications

Asset Site

The following fields are being audited within this application:

- assettag
- classstructureid
- project
- assettype
- environmental_flag
- ponum
- contract
- status
- classstructureid
- tasknum
- model
- report_area
- mfgdate
- voltage
- trust_flag
- maint_office
- failurecode
- installdate
- manufacturer
- parent
- purchaseprice
- serialnum
- expenditure_org
- leasewonum

Audit History Filter 1 - 7 of 7 Download

Action	Table Name	Columnname	Value before change	New Value after change	Change By	Change Date
CHANGE	ASSET	MODEL	SEL-351-61H42542XX	035161H42542XX	ROGERS	4/21/08 3:02 PM
CHANGE	ASSET	VOLTAGE	125 VDC	69,000	PADGET	1/29/07 12:59 PM
CHANGE	ASSET	MODEL	SEL-351-6	SEL-351-61H42542XX	PADGET	1/29/07 12:59 PM
CHANGE	ASSET	PROJECT	BDW ROUTINE O&M - M	BDW-EQUIP O&M-HIGH PLAINS	ROGERS	2/13/06 7:48 AM
CHANGE	ASSET	TASKNUM	57010	93080	ROGERS	2/13/06 7:48 AM
CHANGE	ASSET	PROJECT	BDW WES M	BDW ROUTINE O&M - M	ROGERS	2/13/06 7:45 AM
CHANGE	ASSET	PURCHASEPRICE	0	2974	ROGERS	9/4/02 8:58 AM

Allows you to capture the old and new value of the column that has been changed

Migration 411 to 6

A combination of PLSQL scripts and the TRM Scripting engine were used to load data. PLSQL was used for the larger tables such as workorder and labtrans.

- 184 cleanup scripts (to make sure tables were empty before the load)
- 102 scripts to get data into csv files for the TRM Scripting Engine
- 420 PLSQL load scripts



MAX6 Lessons Learned

- ▶ Questions?
Thoughts?

