

## **Maximo Upgrade Project Plan**

Since 1998, we have spent 100% of our time installing and upgrading Maximo for major Fortune 500 companies and the US government. We have upgraded companies from Maximo 4.11 to Maximo 5.2, Maximo 5.2 to 6.2 and currently completing an upgrade for a large US Air Force base from Maximo 5.2 to Maximo 7.2.

The upgrade process we follow is:

1. Train Subject Matter Experts (SMEs) in the capabilities of the new software.
2. Identify opportunities to use the new capabilities.
3. Set data standards.
4. Develop a project plan to upgrade the database and system processes.
5. Perform data mapping from current system to new system.
6. Migrate the data to a new test system using SQL, Microsoft Access, the Maximo MEA, and the Maximo upgrade software as required.
7. Modify Maximo screens to conform to business processes.
8. Work with SMEs to validate new system and modify as required.
9. Upgrade reporting (Crystal, Actuate, BIRT, etc).
10. Set up Security Groups and Users.
11. Implement new workflow processes as required.
12. Plan the conversion.
13. Train users.
14. Convert.

At a major Corn Processing company based in Decatur, IL, we developed Corporate-wide data standards and reporting standards. This allowed cross-facility information sharing and performance comparisons. One benefit was that, for the first time, it allowed factories to share high cost, critical spares (motors, pumps, etc) and also allowed the corporation to develop company-wide procurement contracts for MRO items that significantly decreased the cost of maintenance. We also created standard Key Performance Indicators (KPIs) which encouraged knowledge sharing and Best Practices.

When upgrading Maximo in many facilities or factories, our experience is that it is critical to develop a standard upgrade template/process that is “repeatably reliable” to decrease the time and cost of the upgrade process. Specifically, when upgrading from Maximo 4 to Maximo 7, you have an exceptional opportunity to consider a consolidated Maximo implementation using the Maximo Organization and Site functionality.

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