Maximo® 6 Upgrade – Assessment Service

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Total Resource Management has been helping clients better use Maximo for over a decade. We have the expertise to help you upgrade versions, migrate, consolidate instances, and integrate with other systems. Our clients are asset-intensive, complex and span industries from the Department of Defense to civilian Federal agencies; from state and local entities to utilities, energy and natural resources; and from manufacturing to retail.

What We Do To Help You Get Started

Since upgrading to Maximo 6 is a relatively challenging IT initiative that involves several business functions, changes to business processes and comprehensive IT requirements, many of our clients want to know the scope of the project. *TRM offers a complete assessment service for upgrading to Maximo 6.*

This assessment typically consists of the following activities. TRM will

- Provide an overview of the new features of Maximo 6 and options for your organization
- Review existing business processes and recommend improvements based on industry best practices
- Identify new features of Maximo 6 that will need to be implemented
- Assess your current security configurations and assist with the development of a Maximo 6 security plan
- Assess current application configurations including screen changes, rules, custom triggers and custom interfaces to identify and document potential issues that could surface during the upgrade process and ensure all required configurations will be migrated and documented

One of the Largest Water Wholesalers
An Upgrade Story

TRM supported one of the largest water wholesalers in the U.S. as they migrated from Maximo 5.2 to 6.2. We evaluated their existing business processes and explained and identified new features of Maximo 6 that could be used. We then made recommendations about how they could improve their business processes using industry best practices and how the technology should be implemented to support these processes.

For the actual upgrade, TRM addressed:

- Actuate reports
- Screen updates
- Database configurations
- User training (system administrator, Maximo administrator and end-user)

The upgrade was completed in their lab environment with detailed documentation and upgrade plan. The entire production environment was upgraded using only a six-hour downtime window. TRM successfully upgraded the development, staging and production environments. The entire project was completed in just under two months.

Each upgrade comes with its own unique challenges. During this project for example, TRM had to write custom SQL scripts to remove inconsistencies in the legacy database in order for the upgrade tool to run. Also, during the upgrade TRM found issues with the upgrade tool and the Actuate installer. TRM partnered with IBM and resolved the issues.

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A Consulting *and* Technology Company

- Validate the data integrity of your existing Maximo database and make recommendations for improvements to facilitate the upgrade process
- Provide feedback and make recommendations on the implementation plan and strategy
- Design a continuous improvement program

How We Do It

TRM uses a standard methodology to capture information, make determinations and work with the client team on the plan going forward. We provide a roadmap for the migration (the "to-be" state).

TRM consultants gain an understanding of your system by using standard consulting data calls (phone, email and conferences) and typically will conduct an onsite assessment.

Additionally, TRM consultants will review a database export of your database or create an environment where a series of scripts can be run. These create objects and statistics that are used for data validation.

TRM Maximo Consultants also assess and review your existing business processes. We typically perform the business process review in the form of a three-to-four day onsite workshop. Prior to the workshop, TRM will review your existing processes and current design documentation. We will then develop an agenda and work with you to determine the right personnel for the onsite workshop.

The workshop enables our consultants to team with your organization to determine the desired business processes and how Maximo can support these business processes. We then document the new requirements in a TRM Functional Requirements and Design Specification (FRDS) document and validate how our clients will proceed with the Maximo 6 upgrade.

During this assessment, TRM will:

1. Conduct a high-level review of the existing Maximo system
2. Review as-is business processes
3. Gain an understanding of desired modules and functionality that will be used in the Maximo 6 upgrade

4. Gain an understanding of the infrastructure
5. Assess data and reports that will be migrated to Maximo 6

Inherent in each task is skilled project management expertise which enables strict control of costs and schedules and facilitation of project review meetings (focusing on teamwork and client coordination).

What We Provide

TRM Maximo consultants will provide:

- Upgrade assessment documents that will summarize the findings and recommendations
- Templates for documenting configurations of your:
  - System
  - Site
  - Organization
  - Security

These deliverables will provide information about areas that need improvement and options for various approaches for the implementation and ongoing improvements where applicable.

About Total Resource Management

Total Resource Management (TRM) is focused on improving the asset and operational performance of organizations through the effective use of information technologies. TRM is an IBM Premier Business Partner with over fifteen years; experience delivering asset and service management solutions based upon IBM Maximo. TRM supports clients across a wide range of industries, including government, defense, cities, facilities, energy, utilities, transportation and life sciences. TRM is based in Alexandria, Virginia and has business centers across the U.S. For more information, visit www.trmnet.com or call 703-548-4285.