

Case Study: Energy Industry

Data Migration to Maximo 7.5 using the Alchemize™ Tool

Project Synopsis

A major global energy company engaged Ascension Strategies to assist with their migration of one of its international Business Units from a legacy DataStream 7i instance onto its existing Maximo 7.5 multi-org corporate standard environment. This Business Unit is one of North America's largest natural-gas-fired, combined-cycle power-generation facilities. The cross-platform legacy DataStream system included 12 years of multi-lingual work management, purchasing, and inventory historical data which needed to be migrated into the Maximo 7.5 instance which was integrated with Great Plains.

The use of the Maxis Technology Alchemize™ proprietary data loading tool and sound project management practices were keys to the success of this effort. The migration from the legacy DataStream instance to the Maximo 7.5 instance was completed within the project schedule, within the fixed-price scope, and with all milestones completed and deliverables met, resulting in a high level of client satisfaction.

“The performance of the Alchemize™ tool, the engagement by executive stakeholders, the extra effort by team members, and bi-directional communications were the keys to success on this challenging project.”

- Ascension Project Manager



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Ascension Team

- Senior Project Manager
- Lead Data Architect
- Data Architect
- Functional Lead
- Spanish-Speaking Consultant

Project Constraints

The project required the migration of 12 years of DataStream work management, purchasing, and inventory data and was constrained by the following requirements:

- The project had to be completed within a 3-month calendar timeline.
- The project was a fixed-price engagement.
- Data had to be added to the existing Maximo corporate standard deployment as a new Maximo Organization (Org) which was integrated with Great Plains.
- Migration had to be performed with minimal or no changes to the existing Maximo system and TRM Rules Manager enhancements.

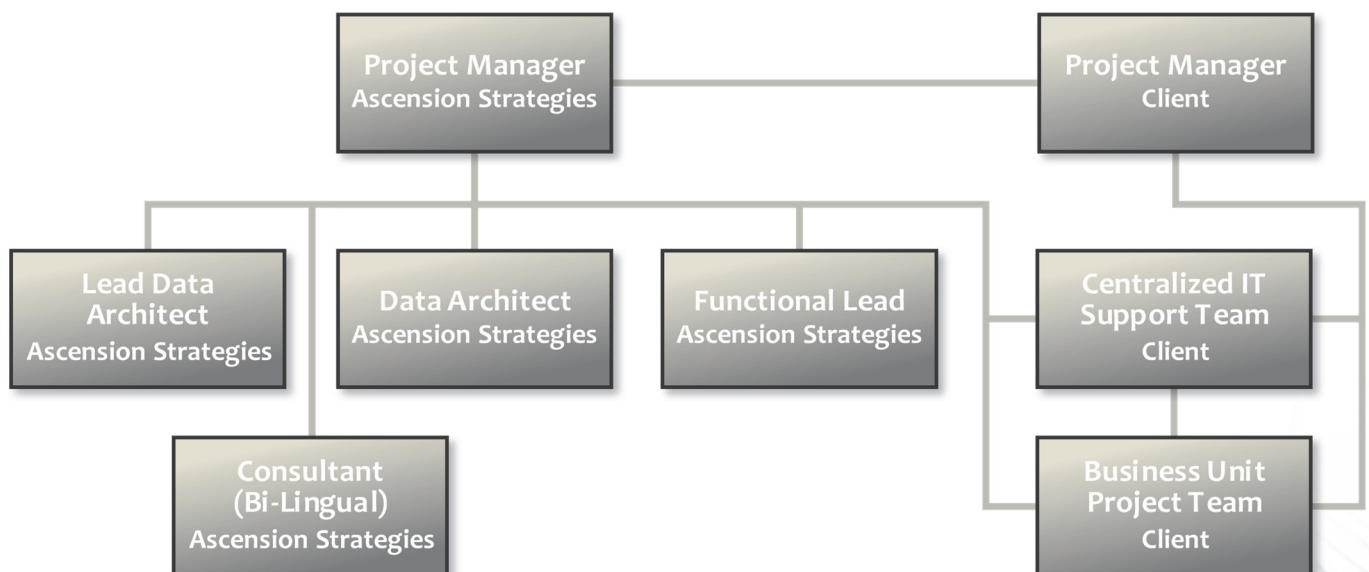
Technology Profile

- Maximo 7.5.0.4 on Microsoft SQL Server 2008 R2
- Maximo Integration with Great Plains
- TRM Rules Manager
- Windows Server 2008 R2
- DataStream 7i on Oracle 10g
- *Alchemize™* by Maxis Technology

Additional Challenges

The fixed price, fixed duration project was further complicated because the 3-month timeline spanned the Q4 US holidays, and the team needed to observe different international holidays.

The project also consisted of a multi-layer client team structure with a centralized US Maximo Support (IT) team as one layer, primarily responsible for system and technical activities. The Business Unit layer served as the actual “end client”, responsible for functional areas and legacy system information, and including multi-lingual team members.



Additional Challenges, *continued*

Another requirement which had to be factored into the scope was the client's policy that contractors and vendors could not have any access to the Production environment, therefore all Production setup, configuration, and data loading had to be done by client staff only.

Project challenges included a fixed timeline which spanned US holidays, fixed cost, migration of 12 years of multi-lingual data to an existing multi-org Maximo instance, and testing by users who had limited Maximo knowledge.

The legacy DataStream system was housed on a hosted platform with extremely limited database access. The multi-lingual data (both Spanish and English within any given record) contained several years of both validated and non-validated data which had been maintained in a stand-alone capacity. These data anomalies required data transformation in order to migrate the legacy DataStream Oracle data to the Maximo SQL Server database, which involved mapping the legacy General Ledger structure and data within the native data itself.

In addition to the data-related challenges, an additional challenge included the inability of the client's Business Unit to perform testing and validation requirements within the scheduled activity periods to maintain the project delivery timeline. A related factor was the Business Unit's decision to engage a separate 3rd party firm to deliver Maximo training, which was insufficient to provide end users with adequate understanding of the client's business processes and did not develop end users' competency in Maximo features and functionality.

Ascension Strategies' Approach

Ascension Strategies utilized their extensive experience to shape the project scope and approach to meet the project parameters and timeline requirements, while factoring in budgetary considerations and utilizing several specific approaches to address risk management for the fixed-price engagement.

A milestone approach utilizing a combination of completion-based and approval-based activities was proposed to meet the fixed price request, which allowed for a stepped project progression and risk mitigation. Additionally,

only professional fees were maintained as a fixed price, while allowable travel expenses were based on actuals against a not-to-exceed project threshold.

To accommodate the aggressive project timeline which spanned several Q4 US holidays, the project was executed utilizing primarily US-based offsite resources. This approach reduced the time lost while these resources would have been traveling and also minimized travel expenses.

Ascension Strategies' Approach, *continued*

Ascension Strategies employed their *Best-Fit Resourcing™* methodology to engage a dynamic team of experienced consultants, including a Senior Project Manager and Functional Lead, both with prior experience and familiarity with the client's Maximo system and deployment; and two Data Architects to accommodate a multi-stream approach to migrating data components, while working on multiple project tasks in parallel. The Functional Lead and Lead Data Architect also possessed both Maximo and DataStream functional and technical knowledge, which helped reduce the data mapping and validation efforts. The Ascension Strategies team also included a Spanish-speaking consultant who was available on an as-needed basis, as bi-lingual communication requirements emerged during the project.

To facilitate the different role and topic based discussions necessary between the client's Business Unit and Maximo IT Support Teams, Ascension Strategies' Project Manager conducted multiple meetings and communication programs across the groups, using a targeted audience approach which involved frequent and regular dissemination of project status, direction, and information. This approach ensured that meetings and discussions stayed on topic, with quick decision turnaround by appropriate stakeholders.

Having prior experience with the client's corporate policy for contractor and vendor access to the Production environment, Ascension Strategies' scope included the following tasks to reduce project risk:

- Development of instructional documentation for using Maxis Technology's *Alchemize™* solution.
- Allocation of consulting services support to client staff to assist them with loading of data to the Production environment.
- Utilizing the Maximo QA ("Test") environment to test the data loading, and also serve as a hands-on training scenario to instruct Maximo support resources responsible for the final client loading to the Production environment.
- Development of detailed procedural, actions, and roles and responsibility checklists, which were routinely reviewed and updated before being validated in the QA environment as a full "dry run" preparation for deployment to the Production environment.

The client's strict timeline for the project and the unique data-related requirements necessitated a more robust solution for mapping, handling, and loading the data than a traditional services-based approach.

Ascension Strategies scoped and utilized the Alchemize™ proprietary data solution by Maxis Technology as the answer to this key data migration challenge.

Ascension Strategies' Approach, *continued*

The *Alchemize*[™] solution is a native Maximo application which has full access to all Maximo Business Objects for data loads through the MBOs and allows for:

- Over 30% reduction in the cost to perform data migration than traditional services-based data migration.
- Ability for multiple load jobs to run in parallel and jobs to be scheduled during non-peak times.
- Significantly reduced data loading time (down to minutes to hours instead of traditional approach requiring hours to days).
- Generation of loading metrics for source/target record counts and load times for project planning and benchmarking.
- Embedded data mapping and transformation rules.
- Use of native Maximo rules which provide automatic data validation.
- Auto Mapping for one-click matches, which significantly reduces manual analysis.

To enable setup and utilization of the *Alchemize*[™] solution with the hosted DataStream application, periodic copies of the DataStream Production database had to be built and migrated to a non-production environment which was accessible by the project. This migrated “staging” DataStream environment was also utilized to facilitate data validation and testing.

After experiencing the significant knowledge gaps in the client's end users' Maximo skills and their inability to perform the necessary Maximo testing within the project schedule, the formal change control process was followed. Two Project Change Requests (PCRs) were created to extend the original scope and provide onsite functional and procedural testing support to the client's Business Unit during key QA testing activities. Ascension Strategies also developed additional documentation which illustrated the translation of where and how data is displayed in DataStream versus Maximo, in order to aid the client's Business Unit personnel who were responsible for conducting testing and data validation.

Ascension Strategies also deployed resources to provide additional post-implementation Production support and da-

Project success was achieved by:

- ***Executing the project in a partner relationship with the client***
 - ***Leveraging Maxis Technology's Alchemize[™] tool***
 - ***Following good project management and change control practices***
 - ***Deploying a diverse team of experienced Maximo consultants***
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Results Achieved

The legacy DataStream data was fully migrated to Maximo with only 5 field length changes and no additional configurations or custom tables or fields required to the Corporate Maximo deployment, and with the Great Plains integration functioning properly.

Utilization of the *Alchemize*™ solution resulted in an ability to execute a complex project in less time, at reduced costs, with a full Production environment load in less than 6 hours for system cutover, and with tool utilization successfully executed by the client's Maximo support staff.

Contact Us

Contact us today to learn more about this case study, the Alchemize™ data solution, or how the experienced Team at Ascension Strategies can solve your Maximo project challenges and requirements.

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