

Case Study: Energy Industry

Maximo 7.5 Data Reorganization and Transformation

Project Synopsis

A major global energy company engaged Ascension Strategies to perform a significant data reorganization and transformation for two of their business units. Each client business unit was configured as an individual Maximo system Organization (Org) in a common Maximo 7.5 environment, integrated with Great Plains. This reorganization required reconfiguring and transforming the Maximo data from two separation Maximo Orgs into one new Org with two Sites, where each of the former Orgs would now be a Site under the new Org (see diag. 1). Included in the data transformation scope were Purchasing (GLs, Purchase Requests, Purchase Orders, Receipts, Invoices, and Transactions), Inventory (Vendors, GLs, Items, Storerooms, Reorders, and Balances), and Maintenance (Work Orders, Users, Labor/Crafts, Persons, Assets/Locations, and Domains/Value Lists) – all of which also included full historical data and maintaining referential integrity.

By leveraging a combination of industry and domain experience, engaging a flexible resourcing model with effective Project Management, leveraging a strategic approach to executing project scope, and utilization of the *Alchemize™* proprietary data solution tool, Ascension Strategies achieved a highly successful completion of the project on time, within budget, virtually error or issue free, and providing an automated solution for complex Purchase Order handling which saved the client a significant amount of manual effort and rework.

The project Keys to Success were thorough planning and scoping, having executive sponsorship engaged, assembling an experienced team of consultants, utilizing a flexible resourcing model, and leveraging the Alchemize™ data solution.



Project Constraints

There were two significant constraints to be factored into the project. The largest being that Ascension was also engaged to execute another large Maximo project with the client in parallel where this project had to be completed start-to-finish in the middle of the other where a complete mirroring of the Maximo environments was already in-progress, and required some overlap and sharing of DEV and QA Maximo environments, and a limited availability of non-Production Great Plains environments integrated with Maximo. The second was transformations being performed in Maximo needed to match and sync with Great Plains, with updates to each system being performed separately.

Additional Challenges

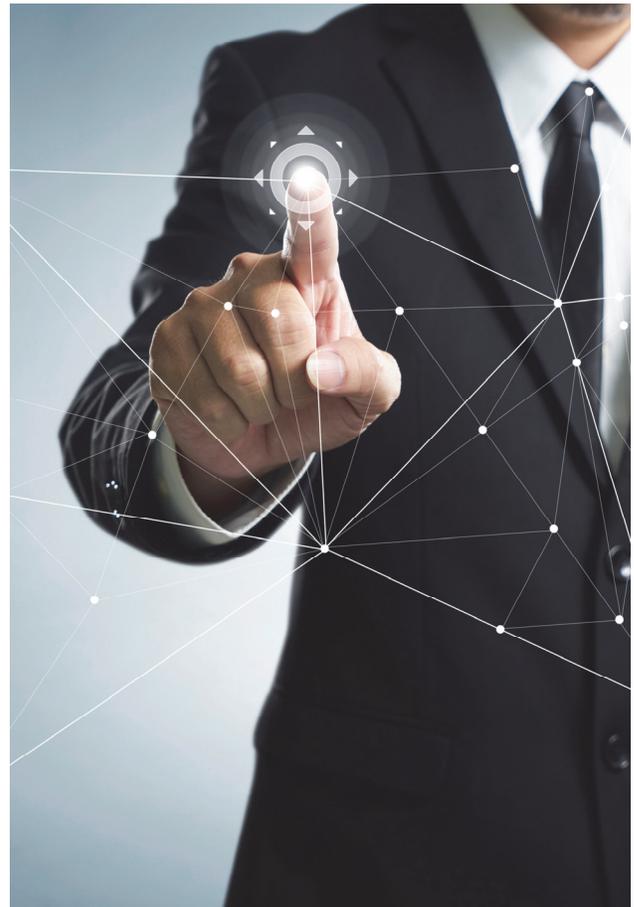
The Data Reorganization and Transformation project faced some additional challenges in mapping and transforming GLs, requiring historic conversion rates between several currencies, and the predominance of purchasing related master data was owned by Great Plains and had to be populated into Maximo via the client integration.

Ascension also had to develop and implement a solution for where the client had a significant number of open Purchase Orders with partial or no receipts that needed to be retained following the migration and transformation.

Note: See the Maximo 7.5 Organizational Division and Migration case study as one of parallel projects executed during this Maximo 7.5 Data Reorganization and Transformation project.

Technology Profile

- Maximo 7.5.0.4
- Microsoft SQL Server 2008 R2
- Maximo Integration with Great Plains
- DataSplice Mobile
- TRM Rules Manager
- Windows Server 2008 R2
- Alchemize™ by Maxis Technology
- BizTalk



Ascension Strategies' Approach

Ascension Strategies leveraged their extensive experience and on-going relationship with the client, and knowledge of the client's Maximo system and deployment, to shape a project scope that met client requirements and expectations – and which specifically supported Ascension's recommended approach, while addressing the identified project constraints and challenges.

The project was also scoped to include utilization of the *Alchemize™* data solution in a monthly rental licensing option. Use of *Alchemize™* would allow for the level of data transformation required, while maintaining data integrity, and at a lower cost than traditional resource-based data efforts. *Alchemize™* also allowed for the development and control of data tasks between the different projects (including being able to quickly and easily reverse and restore jobs to address environment sharing across projects), and provide automated data transformation solutions to address specific project requirements – in-

cluding the open Purchase Order handling.

Ascension developed and implemented a programmatic and automated solution using *Alchemize™*, to identify all open Purchase Orders and classify them into three groups: those having no receipts, those having partial receipts, and those which were either fully received or could otherwise be closed out (see diag. 2). Open POs with no receipts were updated with requisite new Org/Site information and set to waiting for approval (WAPPR) to allow for client business process, workflows, and integration to validate and process. Open POs with partial receipts were split into two POs: one for the original PO number appended with a "-0" with the received values and updated to a closed status, and the second with the original PO number appended with a "-1" for the remaining items to be received and only for the remaining PO value and unreceived items, and set to WAPPR to similarly allow for client business process, workflows, and integration



Diag. 2

Ascension Strategies' Approach, *continued*

to validate and process. Other requisite data and org/site transformations were performed to both "split" POs. Purchase Orders already in a historical status (Close or Canceled) were simply updated as part of the historical data transformation procedures.

To address matching and validating with Great Plains financial data changes for the project and handling identifying transformation rules for GLs and historic conversion rates between multiple currencies, Ascension worked with the client IT support staff and business unit financial system owners to create detailed mapping matrices and transformation tables for the as-is and to-be data updates and transformation. Fortunately, the client was also able to extract historical conversion rates for the multiple currencies to provide the data mapping necessary.

Another distinct approach Ascension Strategies implemented to reduce scope costs was performing 100% of the work remotely (offsite), utilizing a flexible resourcing model to engage the resources and subject matter experts only when assigned project activities and support were scheduled or needed.

Ascension Strategies utilized their *Best-Fit Resourcing™* methodology to engage a dynamic team of experienced consultants who were the right resources for the right jobs, who had the skills and capability to meet the requirements of executing and supporting scope activities across the multiple client Maximo projects running in parallel, and to facilitate continuity across the parallel projects. This Ascension Team consisted of a Senior Project Manager, a bi-lingual Functional Lead, and a tiered data team consisting of a Lead Data Architect to serve as a single point of contact and coordination for all data-related activities, with three Data Engineers responsible for the core data development effort.

Finally, to help mitigate any risk inherent in performing the project entirely offsite and executing multiple and overlapping projects in parallel, the Ascension Strategies Program and Project Managers established and maintained a detailed communication plan, multi-level weekly project team meetings, regular project reporting methodologies which included detailed documentation, and strict and careful project planning and scheduling.

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

- 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 (minutes to hours instead of 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
- Native Maximo rules which provide automatic data validation
- Auto Mapping for one-click matches, which significantly reduces manual analysis

Results Achieved

The Maximo 7.5 Organizational Division and Migration project was delivered as-scheduled with no impact to the other parallel projects, within budget, with a nearly error free deployment to Production, and touted as “highly successful” by the client stakeholders and project personnel.

There were only four (4) minor, non-business -impacting errors identified during go-live and post-implementation, all of which were discovered and resolved within minutes on day one of Production deployment, with only one (1) of the errors being data related.

The programmatic and automated open Purchase Order handling allowed for retention of key record information without the need to reissue new PO numbers to vendors and suppliers, and saved the client end users from having to perform substantial manual handling for transitioning of Purchase Orders.

Alchemize™ was also able to provide technical data record counts for all processing and handling procedures to allow for rapid technical validation during project testing and data comparisons.

The remote work and flexible resourcing approach saved the client tens of thousands of dollars in travel and expenses, additional efficiency savings on consulting services, and allowed for engagement of project resources only when project tasks and support were required, virtually eliminating non-productive project costs and idle consulting time.

The Ascension Data Team was successful by having a front-facing Lead Data Architect engaging with the client and project teams,

thus enabling the Data Engineers to receive direction from a single point and focus on the data development in a heads-down, concentrated ability.

Additional keys to success for the project included having client executive sponsors engaged in throughout the project, performing regular and thorough communication throughout the project, establishing and delivering superior project documentation, and utilizing a partnering approach between Ascension Strategies, the client project teams, and other project

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 exceed your expectations in solving your Maximo project challenges.

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