

Case Study: Energy Industry

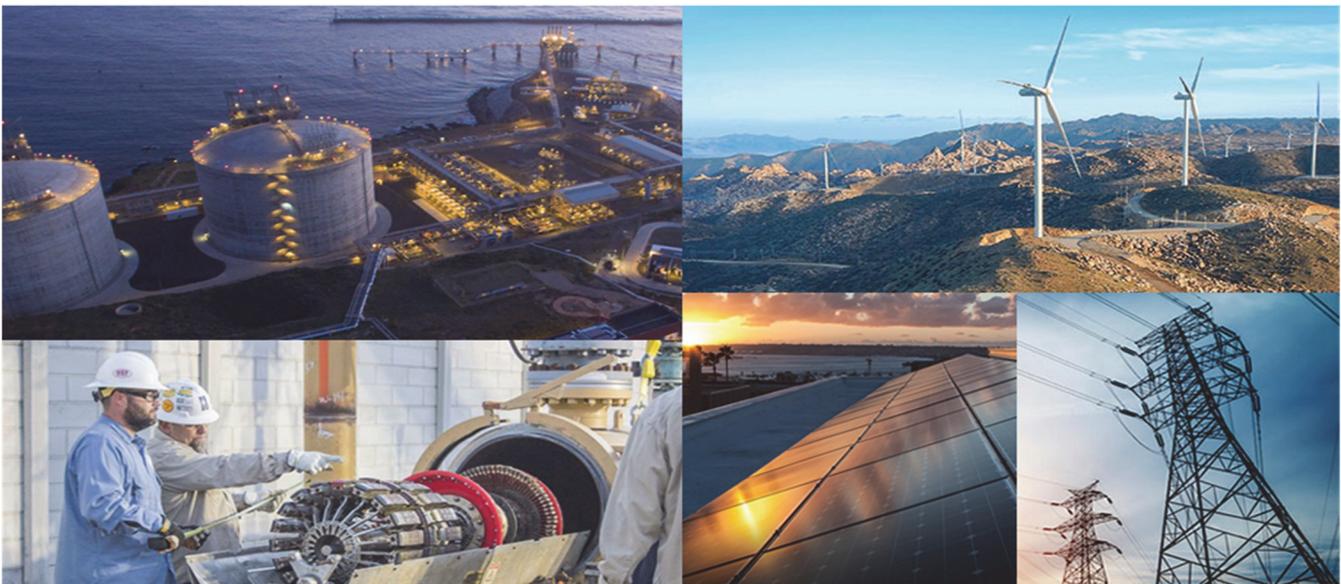
Maximo 7.5 Organizational Division and Migration

Project Synopsis

A major global energy company engaged Ascension Strategies to perform an organizational division of their corporate Maximo 7.5 Enterprise Asset Maintenance system between their US and non-US business units; with these business units configured as 40+ Maximo system Organizations (Orgs) in a common Maximo environment. This organizational split required a new and separate system be brought online as a complete mirror of the corporate deployment, including an integration with Great Plains, DataSplice Mobile, SSRS Reports, TRM Rules Manager, and Maximo Transportation and Calibration industry solutions. This new environment would then need to have only the data for the non-US Orgs retained, while also retaining all configurations, features and functionality, history, and data integrity of the original Corporate Maximo system.

By leveraging a combination of industry and domain experience, engaging a flexible resourcing model, 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, significantly under budget, with less than 48 hours of system downtime for cutover, virtually error or issue free, and at a significantly lower total cost than budgeted.

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 three major constraints to be factored into the project; the largest being that Ascension was also engaged to execute two other client Maximo projects in parallel. One was to add new client business unit companies as Maximo Orgs, and the second to perform a significant data transformation to merge two existing business unit companies configured as two individual Maximo Orgs into a single Org/Multi-Site configuration (1 new Org with 2 Sites); including transformation and updating of all historical information, while retaining data integrity, and performing special handling for the retention of open and partially received purchase orders.

Another constraint was system downtime. As a global Maximo system outage was required affecting all client business units, minimal downtime was necessary to minimize any business impact.

Finally, by the end of the project and cutover to Production on the new non-US business unit system, a complete transition of system ownership, system administration, and Maximo support for new non-USA Maximo system needed to be achieved to the non-USA business unit owning the non-USA companies.

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

Additional Challenges

The organization division and migration project also faced some additional challenges for coordinating with other vendors engaged on components for all of the non-Maximo systems involved, working with key client business unit project team members who were bi-lingual (Spanish-speaking), not all of the Maximo USA data having a direct Org association on the data tables, having to share DEV and TEST environments between the projects running in parallel, and the client having limited staff bandwidth to support the project.

Ancillary Scope Activities

In addition to the core scope effort, there were three key ancillary project activities vital to the data validation, system deployment, and transition for on-going Maximo support by the client non-USA business unit.

These were addressed through multi-layer testing and validation support, development of customized training materials and conducting comprehensive Maximo system administration training, and including an extended post-implementation support.

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

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 not-to-exceed (NTE) project scope that met client requirements and expectations – and which specifically supported Ascension's recommended approach, while addressing key and ancillary project success factors. As part of the scoping effort, Ascension worked with client project management to develop and establish a project schedule to fully assess the level of effort required for the principal organizational division project that also factored in the two other Maximo projects that would run in parallel.

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 all three 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, a Network Systems Engineer, 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 data development effort. Ascension Strategies worked with the client to address their limited staff bandwidth to support the projects by engaging a Staff Augmentation resource to lead the day-to-day Maximo Support for the client's business units, which freed up time for client project team members who would normally provide routine Maximo Support to their end users to instead focus on and deliver project items. Finally, an Ascension Senior Executive Program Manager was also engaged spanning across all projects and support activities to act as the As-

ension single point of authority, and guide the client relationship and monitor execution to ensure quality assurance and conduct routine risk analysis for the projects.

Another distinct approach Ascension Strategies implemented was performing 90% of the work remotely (offsite), and utilizing a flexible resourcing model to engage the resources and subject matter experts only when assigned project activities and support were scheduled or needed. Resources were scheduled onsite only for the key project activities of testing and UAT, training, and initial cutover/go-live and initial post-production support. With the magnitude of the scope and parallel projects, Ascension also extended the post-implementation support beyond typical durations to allow both for adequate support coverage, and to gradually transition all Maximo administration and day-to-day Maximo support functions to the non-US business unit on their new Maximo system.

Ascensions' solution for the client organization division and system migration for the non-US business unit was to install and configure all of the Maximo components on the new non-US business unit hardware to fully mirror the current client corporate Maximo system deployment; which included DEV, QA ("Test"), and PROD environments. Blank databases were created initially in the new Maximo environments, then systematically updated with a full copy from the original source Production environment to the new environment(s) at the appropriate development stages of the project using the DEV to TEST to Production migration and deployment standard. Developed data procedures to remove the US organization data were then executed to the new non-US environment(s) in a data parsing approach. Following each data parsing stage, multi-level functional and technical review, testing, and validation were performed by both the Ascension Project Team and the non-US business unit

Ascension Strategies' Approach, *continued*

owners to ensure accuracy and establishment of a repeatable procedure.

Ascension initiated several no-additional-costs project scope changes utilizing formal Project Change Request (PCR) procedures to enhance overall project success and deliverables, as well as streamline and better support the multiple projects running in parallel. The first, and most significant, was to switch from a traditional resource-based approach to manually map and develop data transformation procedures, to utilization of the *Alchemize*TM data solution. Use of *Alchemize*TM would better address the system downtime constraint, allow for development and control of data tasks between the different projects, provide automated data transformation solutions to address specific project requirements, and reduce data mapping while assisting with handling of data without direct Org association.

The next PCR expanded the training scope two-fold; by creating custom training materials to supplement client standard materials and conduct comprehensive Maximo system administration training, and having all of the Trainers attend the various project training sessions in a secondary or backup capacity to each other. This ensured end-to-end coverage for any overlap between different systems, and also provide a bi-lingual Trainer for any translation needs with the non-US client business unit trainees.

The final change was to review the client standard testing procedures and test scripts to identify and create supplementation testing procedures and test scripts to specifically address the full scope of the project, as well as targeted migration testing procedures for all variances or deficiencies identified during development and testing stages of the project.

To mitigate any risk inherent in the high percentage of remote work 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.

AlchemizeTM 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 on time and significantly under budget, with a nearly error free transition to the new non-US system for Production go-live.

The combination of a predominately remote project model, flexible resource scheduling, and utilization of the *Alchemize*TM data solution resulted in a 34% cost savings from the original project scope – including all no-additional-cost PCRs!

Leveraging *Alchemize*TM achieved an ability to execute all data jobs, migration activities, and cut-over in under 24 hours from a Friday close-of-business release of the original common system, allowing for client non-US business unit validation on Sunday, and fully validated system readiness for Monday morning regular business on the new system, in less than 48 hours total.

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 any idle consulting time.

Regular project monitoring and task completion assessment identified options to provide expanded or additional scope support and changes by utilizing remaining funding for tasks that were completed under project estimates and allocations.

There were only seven (7) minor, non-business-impacting errors identified during go-live and post-implementation, all of which were discovered and resolved within minutes to hours on day one of Production deployment.

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 establishing an effort-based project schedule during the initial scoping phase of the project to eliminate a common project risk of seeking to fit the project scope and execution into pre-determined budget or timeline parameters, having client executive sponsors engaged, regular communication throughout the project, delivering superior project documentation, and utilizing a partnering approach between Ascension, client project teams, and other project Vendors.

Contact Us

Contact us today to learn more about this case study, the AlchemizeTM data solution, or how the experienced Team at Ascension Strategies can exceed your expectations in solving your Maximo project challenges.

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