Maximo Roadmap

This roadmap suggests a path for executing the minimal rework necessary to optimize the customer's existing implementation of Maximo and resolve high-priority pain points. It follows through with suggested steps for upgrading Maximo and the underlying infrastructure; implementing data archiving and improved reporting capabilities; and finally process improvements alongside new technology adoption.

OPERATIONAL STREAMLINING

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Assessment

The goal of this phase is to develop a thorough system-level understanding of the existing implementation.

Infrastructure

- Review application server/cluster configuration
- Review virtual host configuration
- Review service bus configuration
- Review physical machine configuration
- Review database configuration
- Review network configuration
- Review operating system configuration
- Review security

Footprint

- Determine object counts and growth
- Determine database size and growth
- Work order trends by day/month/year
- Meter reading trends by day/month/year
- Workflow trends by day/month/year
- User trends by day/month/year
- Licensing compliance

Integrations

- Model inbound/outbound integration
- Assess per-day inflow/outflow volume
- Identify external systems with protocol (e.g. REST, MQ) and inbound domain names used
- Identify existing interface rules

Configuration/Customization

- Review system logs

- Evaluate integrity check results
- Review installed extensions and versions
- Review source code of customization—Java and automation scripts
- Review escalations
- Review workflow
- Review organization configuration

Rework – Phase I

The goal of this phase is to maintain existing "as-is" functionality while optimizing existing infrastructure.

- Design and implement improved functional separation of Maximo instances using existing WebSphere implementation and hardware
- Redirect all inbound/outbound integrations through MIF-specific cluster using new virtual host and domain name in conjunction with reconfiguring external systems
- Redirect all mobile traffic though mobile-specific-specific cluster using new virtual host and domain name in conjunction with reconfiguring mobile clients
- Place all reporting onto reporting-specific cluster
- Add indices to improve long-running queries
- Implement load balancing and failover leveraging existing database implementation

Rework – Phase II

The goal of this phase is to make minimal changes to "as-is" functionality to correct problems with existing customization and interfaces.

- Gather use cases for "as-is" functionality
- Setup up development environment mirroring Production using OPST SaaS platform
- Review existing customizations for memory leaks and other problems
- Generate and install extensions.xml for existing customization
- Confirm that the updatedb tool runs successfully

Rework –Phase III

The goal of this phase is to make moderate changes to "as-is" functionality to support any immediate pain points identified by the customer.

- Identify current pain points with customer
- Gather use cases for "to-be" functionality that addresses **<u>high-priority</u>** pain points only
- Develop and present functional design document for suggested "to-be" functionality
- Develop and present technical design document for suggested "to-be" functionality
- Develop and present project plan for suggested "to-be" functionality
- Execute project plan to implement "to-be" functionality addressing high-priority pain points

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At this point we should have the existing implementation performing well and high-priority pain points resolved with the minimal amount of rework. The next suggested

Upgrade – Phase I

The goal of this phase it to plan the minimal effort required to upgrade the customer to Maximo 7.6 with required infrastructure improvements.

- Determine and propose upgrade path for Maximo, extensions, application server, database and operating systems
- Determine and propose new physical or virtual hardware configuration
- Determine and propose **required** upgrade path for external systems
- Determine and propose optional upgrade path for external systems
- Identify and propose new application load balancing software/hardware
- Update load balancing/switchover configuration for upgraded database
- Develop and propose new archiving strategy
- Develop and propose new reporting configuration
- Identify and propose any mobile solution changes
- Demonstrate prototype of new architecture using OPST SaaS platform and demo data

Upgrade – Phase II

The goal of this phase is to develop and execute with minimal effort an upgrade to Maximo 7.6 with required infrastructure improvements.

- Devise, test and present upgrade steps
- Update out-of-box screens to correlate with "as-is" screens
- Update customization as needed
- Demonstrate prototype using customer data
- Gather prototype feedback from all stakeholders
- Adjust proposed solution as needed
- Implement on-site development and testing environments as needed
- Facilitate user acceptance testing
- Facilitate build-out of require infrastructure components prior to upgrade
- Execute production upgrade
- Implement any mobile solution changes

At this point the customer should have a well working Maximo implementation with the minimal amount of rework required, high-priority pain points resolved, upgraded to the latest software versions, and running on an optimized, robust infrastructure.

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[1] https://www-01.ibm.com/support/docview.wss?uid=swg27049624

Data Management – Phase I

The goal of this phase is to plan a data archiving strategy that will make the Production environment as lean as possible. This will be coupled with planning a reporting configuration change that minimizes impact to the Production environment while offering improved capabilities.

- Gather data and reporting requirements from all stakeholders
- Gather desired capabilities from all stakeholders
- Update "as-is" and "to-be" reporting-specific use cases as needed
- Identify needed changed to "as-is" reports
- Identify all "to-be" reports
- Demonstrate reporting capabilities of BIRT, Cognos and data analytics solutions from IBM
- Demonstrate data archiving solution using IBM Maximo Archiving with Optim Data Growth Solution
- Identify any required data or process changes to implement "to-be" reports, selected reporting technologies, and data archiving strategy
- Develop and implement combined data archiving and reporting solution using existing customer development environment in the OPST SaaS platform
- Implement preliminary "to-be" reports

Data Management – Phase II

The goal of this phase is to implement the devised data archiving and reporting solution in the Production environment.

- Gather prototype feedback from all stakeholders
- Implement remaining "to-be" reports and other functionality
- Implement change to on-site development and testing environments as needed
- Facilitate user acceptance testing
- Implement proposed database archiving and reporting solution in Production
- Update mobile solution as needed

At this point the customer should have an update-to-date, well-performing Maximo implementation with all high-priority pain points resolved for users and data reporting capabilities that provide the desired-level of business insight to support operations.

Process Improvement & Technology Adoption – Phase I

The goal of this phase is to expose the customer to available technological improvements, with an emphasis on out-of-the-box capabilities, coupled with the capture and prioritization of desired long-term "to-be" functionality.

- Demonstrate new Maximo extensions and data analytics capabilities in conjunction with IBM
- Gather use cases for future "to-be" functionality desired by customer

- Devise customization reductions that bring the existing implementation closer to an out-of-the-box configuration
- Update this road map

This is the end of the road for now.