



Case Study Overview: Maximo Implementation

Maximo 7 New Implementation: Oil & Gas Refinery

Aqitas Solutions provided complete Maximo implementation services to a major oil refinery to transition their existing systems to the Maximo EAM solution. Our seasoned Maximo consultants, with previous oil and gas industry experience, led the team through the entire process, from the planning and prep stages through installation and the Maximo training and support that followed.

Customer Situation

A major oil refinery assessed its current maintenance processes and determined a need to transition its existing CMMS to the Maximo Oil & Gas Industry Solution. As part of the solution, the company wanted to integrate its current financial system with the new system, while also adding peripherals that would enhance its ability for planning/scheduling and turn-around shutdowns.

Aqitas Role

Aqitas led the charge to conduct an initial assessment of the company's current business requirements and the ability for Maximo to meet its goals. Following the Maximo EAM implementation assessment, Aqitas implemented the Maximo solution with all requested add-ons including Primavera, and MS Project. Maximo was also integrated to the JD Edwards financial system. Aqitas was also responsible for the data migration from the company's legacy systems into Maximo.

Maximo Profile

- Maximo Version: Maximo 7.1.1.5 New Implementation with Oil & Gas Industry Product
- Database: Oracle 10g
- Application Server: IBM Websphere
- Financial Integration: JD Edwards

Additional Technology

- Mobile Product: IBM Maximo Mobile Inventory Manager
- Reports: BIRT Reporting
- Capital Project Integration: Primavera
- Other: IBM Maximo Asset Navigator, MS Project

Project Challenges

The identification of a company's business requirements can be a daunting task. Once the original business requirements are delineated, the implementation of the functionality frequently leads to the discovery of new requirements. For example, one client requirement needed to change the status of a Work Order based on escalations. However, such escalations prevented the approval of Work Order tasks by their supervisors. This discovery led to a new requirements and additional workflows to further enhance Maximo functionality.

Actions Taken

Preparation

Maximo Implementation workshops were conducted between the client and Aqitas consultants to review business and functional requirements and identify configurations and decisions necessary to set up Maximo in support of the company's specific needs.

Integration workshops were also performed with the client and Aqitas Systems Architects to gain understanding of the business and functional requirements between Maximo and the financial system, JD Edwards. These requirements were used to implement and configure the integration between the Maximo Integration Framework (MIF) and JD Edwards.

Installation and Configuration

Aqitas implemented several unique configurations based on the company's requirements, such as the development of Conditional Expressions for controlling field security, and the use of Table Domains to customize application list values based on security profile or other entered data. Many of these changes provided an immediate impact when utilizing customized Start Centers.

Other customizations included the implementation of Workflow for a work management process based on status, priority, and escalation-driven date fields. Workflow was also developed to automate and streamline the PR/PO approval process. The company engaged Aqitas to design and develop 10 custom BIRT reports to meet the business needs.

Finally, all configurations underwent unit testing to ensure functionality met the design needs stated by the business requirements.

Data Migration and Integration

Aqitas worked with the company to determine what data values from the company's various legacy systems should be migrated to the new Maximo 7 implementation. All identified data was validated and transferred through a Data Migration Mapping process and the development of Data Migration Scripts. This case included the migration of Assets, Locations, PMs, POs and PRs. However, the company chose to not migrate historical legacy work orders.

In addition, Aqitas installed and configured the Maximo Integration Framework (MIF) to support the synchronization of financial data between Maximo and JD Edwards executed accurately and efficiently.

Maximo Training and Support

In the effort to educate the company's personnel, Aqitas consultants developed detailed custom training materials for each specific client functional role or business area. In addition, several weeks were allocated to provide direct hands-on training of key users in the company in the use of Maximo and its associated components using a Train-the-Trainer approach.

Following Go-Live Operations, Aqitas remained on-hand to provide immediate support for any questions or issues that arose through the initial stages of operation.

Results Achieved

The combined, dedicated efforts of members from Aqitas and the client led to a successful Maximo 7.1.1.5 implementation with the Oil & Gas Industry Solution. The company's requests to add Primavera, IBM Maximo Asset Navigator and MS Project were accurately met. In addition, the MIF integration with JD Edwards allowed the smooth bi-directional delivery of transactions. Prior to Go-Live, the migration of legacy data through the customized Data Migration Scripts gave users ample time for hands-on training. The combination of these results deemed the Maximo implementation a success.