A Switched-on Upgrade Success Story

About the Presentation

- Meridian's Maximo upgrade (5.2 → 7.1.1.6)

  – delivered to scope, on time, and under budget

- This presentation looks at our project from the **business case** to the **close out report** covering how we:

  – Got approval to upgrade
  – Approached the upgrade

- But first… my role on this project…

  – Maximo support & development analyst
  – IT technical lead

About Meridian

- Meridian is a New Zealand state-owned electricity generator and retailer

- Meridian has wind, hydro and solar assets in NZ, Antarctica, the US and Australia

- Greenpeace judged Meridian as NZ's only "green" electricity company

- Meridian aspires to be a global reference company in renewable energy

An overview of Meridian's Maximo Environment

- Used for our NZ power generation assets but not IT ☹

  - Use most of the EAM modules
  - 150 users (licensed for 174☺) – on average about 20 concurrent users
  - 10GB database (90,000 assets, 1.1M work orders)

- Integration with

  - Our financial system Navision (aka Microsoft Dynamics)
  - Our generation event system (work order creation)
  - Condition Monitoring feeds

- CiM Visual Planner Suite

- Coupled to PAM (analyses the condition of our critical plant, and drives predictive based maintenance)

An overview of Meridian's Maximo Environment… PAM

Business Case – Why Upgrade?

- Why?   Maximo V5 @ end of support life
  - Context
    - What is Maximo used for, and how it supports strategic objectives
  - Risks (& increasing costs)
    - **End of support life** & what that does to costs
    - Look at Maximo's MTTR, MTBF & the associated costs to the business
  - Opportunities (& cost savings)
    - Performance improvements from new technology
    - Cheaper environment to implement improvements
    - Simplification of the underlying environment
    - New & Improved functionality
      Linear assets, Conditional UI, LDAP integration

Business Case – Scope & Budget

- Scope
  - "Like for Like" upgrade
  - Maximo + corresponding PAM changes
- Budget Estimates

  - Maximo application
    - The system upgrade $450k
    - External system work on the interfaces $ 40k
    - Implementing new servers & Oracle version $ X

  - PAM application changes $ X

  - Internal staff costs $ X

Writing the RFP

- What would the RFP cover?

  - Maximo application only

    - Parts of PAM out of scope (to be done by Matrikon separately)
    - Oracle & server work out of scope

  - Manage but do not price 3rd party integration work

RFP Format

- Requirements **high level** – "like for like" after all

  - Migrate data & processes to v7 equivalents
  - Use BIRT
  - Use MIF/MEA
  - Rebuild security & use LDAP integration
  - Use our preferred architecture (if possible)

- Background on our Maximo environment – **90% of the RFP document**

RFP Responses

- High quality & competitive responses

- Matrikon was selected for the Maximo upgrade work

- An IT Architecture aside…
  - Weblogic or WebSphere - we went for WebSphere

Project System Design

1 Maximo node on
Weblogic
Windows 2000

Reporting Server (Actuate)
MEA (webMethods)
Windows 2000

Oracle 9i
Windows 2003

V7

2 Maximo nodes on WebSphere
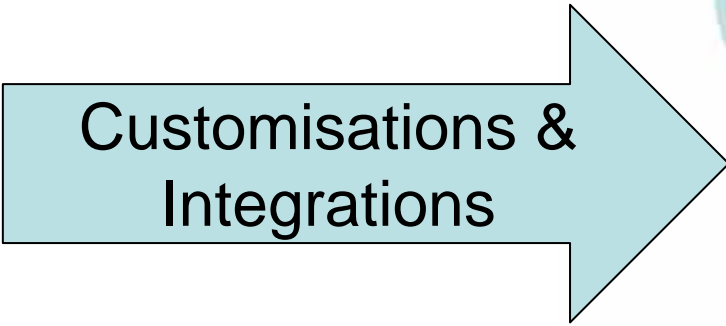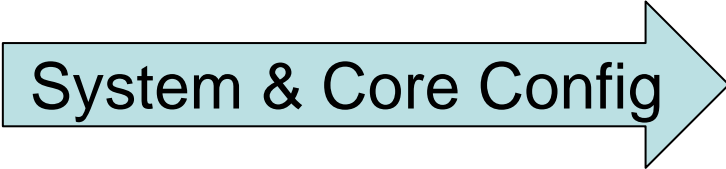Windows 2008 (64bit) physical server

Oracle 11g
Redhat

Simple!

Our Project Approach

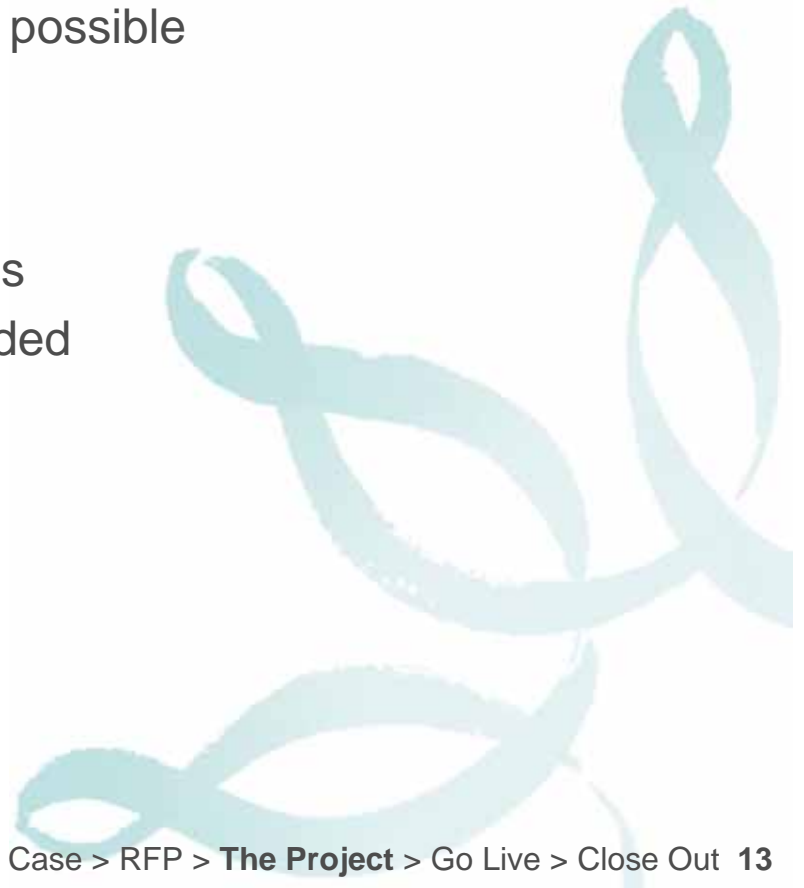**V5**   **V7**

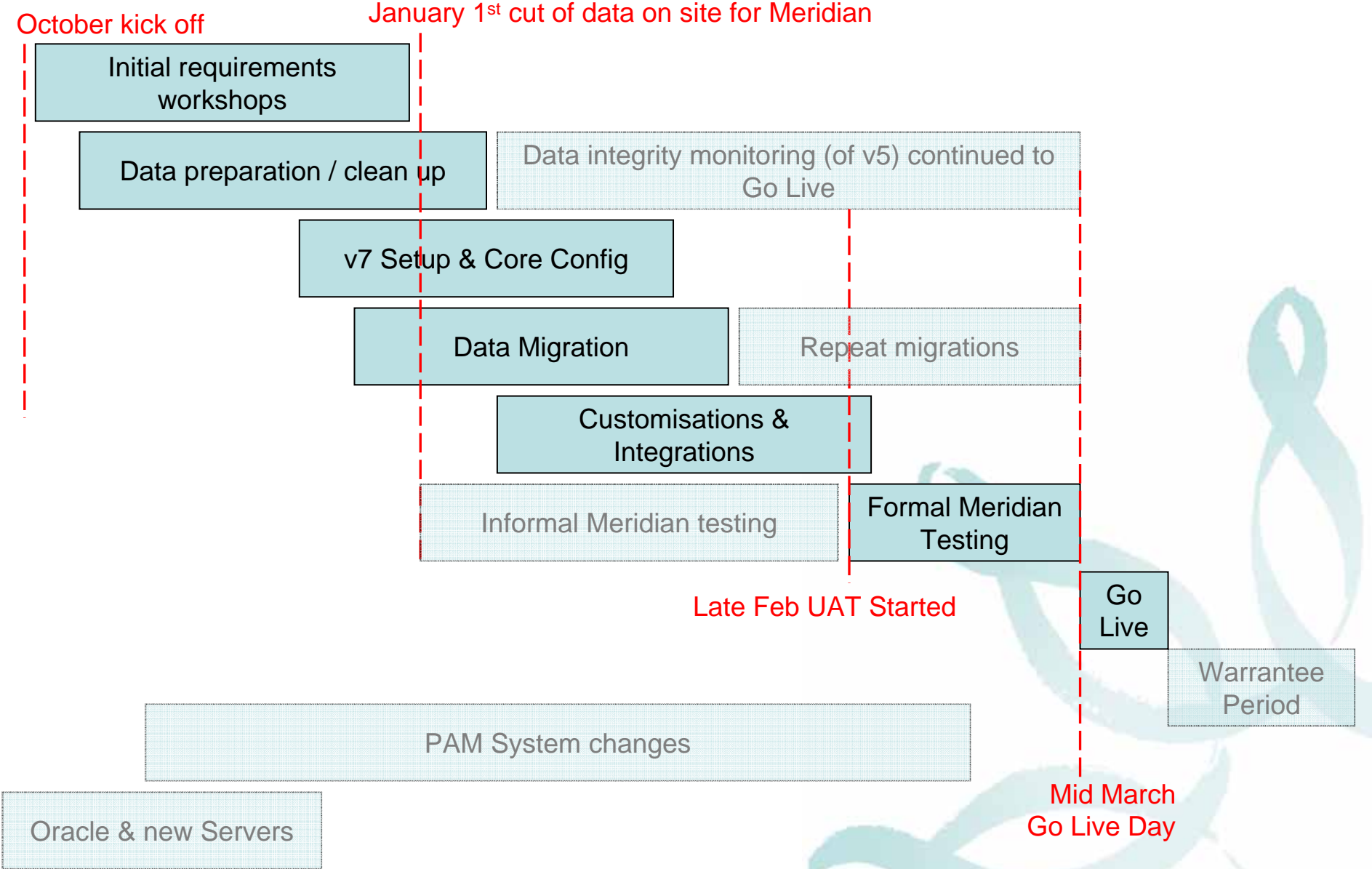System & Core Config

Data

Customisations & Integrations

Our Project Approach…

- System setup → in a template database

- Customisations → Review one by one

- Integrations → Use MIF & kept them vanilla as possible

- Data migration
  - Insert scripts, not Maximo's integration tools
  - Reasonable amount of data cleansing needed
  - What about workflow? We migrated it!

Project Timeframes

October kick off

January 1st cut of data on site for Meridian

| Initial requirements workshops |

| Data preparation / clean up |

Data integrity monitoring (of v5) continued to Go Live

| v7 Setup & Core Config |

| Data Migration |

Repeat migrations

| Customisations & Integrations |

Informal Meridian testing

| Formal Meridian Testing |

Late Feb UAT Started

| Go Live |

Warrantee Period

PAM System changes

Oracle & new Servers

Mid March
Go Live Day

Go Live

- Simple & Short (thanks to our approach)

  – Shut down v5 & import the data into v7

  – Configure external integration systems to point to new Maximo

  – Turn on v7 system

- Weekend outage window

  – Contingency

  – To perform final checks before the users were allowed in

Project Close Out – key success factors

- Project Initiation

  – We set expectations & scope

  – Made the most of the RFP

    • Good understanding of our customisations

    • Prices under our budget

- Project Delivery

  – Early & pragmatic approach to data cleansing

  – Upgrade approach that enabled iterative delivery for testing

- Dedication of the project team! Thank you Matrikon

Project Close Out – what could have been done better?

- End User Testing & Training

- Managing expectations when using a staged go live approach

- A supply of reading glasses!

So what now?

- Honeymoon period is over! System tuning is needed

- Better get onto the opportunities listed in the business case before the project review time

That's it!

QUESTIONS?