Maximo to MAS 9 Migration Checklist

Complete Data Preparation Guide for IBM Maximo Application Suite Migration

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Before You Start

What's Different in MAS 9

Area	Maximo 7.x	MAS 9	Migration Impact
Deployment	On-premise or hosted	Cloud-native (OpenShift)	Architecture change
Database	DB2, Oracle, SQL Server	DB2 Warehouse on Cloud	Data export/import
Integration	MIF, REST API	App Connect, REST API	Integration rebuild
Customizations	Java, JSP	App Framework + Manage	Custom code review
Automation	Escalations, workflows	Maximo + external tools	Logic migration
Reporting	BIRT, Cognos	Manage Reports + external	Report rebuild

Migration Paths

Path 1: Side-by-Side Migration (Recommended)

- Stand up new MAS 9 environment
- Export data from Maximo 7.x
- Transform and load to MAS 9
- Parallel run and cutover

Path 2: In-Place Upgrade (Limited scenarios)

- Upgrade existing infrastructure
- Higher risk, less flexibility
- Only for specific configurations

This checklist assumes Path 1 (Side-by-Side).

Phase 1: Discovery & Assessment

1.1 Environment Documentation

- [ ] Document current Maximo version (7.6.0.x, 7.6.1.x)
- [ ] Document database platform and version
- [ ] Document application server (WebSphere version)
- [ ] Document integration middleware
- [ ] List all Maximo modules in use:
    - [ ] Asset Management
    - [ ] Work Management
    - [ ] Service Management
    - [ ] Inventory Management
    - [ ] Procurement
    - [ ] Contracts
    - [ ] Transportation
    - [ ] Linear Assets
    - [ ] Calibration
    - [ ] Nuclear
    - [ ] Other: _____
- [ ] Document hosted/managed service provider (if applicable)

1.2 Customization Inventory

Application Customizations:

- [ ] Count custom applications: _____
- [ ] Count modified standard applications: _____
- [ ] List custom applications:
  App Name Purpose Complexity (H/M/L)

Database Customizations:

- [ ] Count custom tables: _____
- [ ] Count custom columns on standard tables: _____
- [ ] Count custom indexes: _____
- [ ] Count custom views: _____
- [ ] Count database triggers: _____
- [ ] Count stored procedures: _____

Business Logic:

- [ ] Count escalations: _____
- [ ] Count workflows: _____
- [ ] Count automation scripts: _____
- [ ] Count custom Java classes: _____
- [ ] Count custom MBOs: _____
- [ ] Count cron tasks: _____

Integration:

- [ ] Count integration channels: _____
- [ ] Count external systems integrated: _____
- [ ] List integration points:

System	Direction	Method	Data
ERP (SAP/Oracle)	Bi-directional	MIF	PO, Receipts, GL
HR System	Inbound	REST	Person records

Reporting:

- [ ] Count BIRT reports: _____
- [ ] Count Cognos reports: _____
- [ ] Count KPI Manager configurations: _____
- [ ] Identify critical reports for Day 1

1.3 Data Volume Assessment

Object	Record Count	Active Records	Data Size (GB)
ASSET			
LOCATIONS			
WORKORDER			
WOACTIVITY			
MATUSETRANS			
LABTRANS			
TOOLTRANS			
INVENTORY			
INVBALANCES			
ITEM			
PO			
PR			
CONTRACT			
TICKET (SR)			
INCIDENT			
PROBLEM			
PERSON			
LABOR			
CRAFT			
FAILURECODE			
COMMLOG			
DOCLINKS			
TOTAL			

1.4 Data Quality Assessment

Run these queries to assess data health:

Asset Data Quality:

```sql
-- Assets missing critical fields
SELECT
  (SELECT COUNT(*) FROM ASSET WHERE MANUFACTURER IS NULL AND STATUS = 'OPERATING') as missing_mfr,
  (SELECT COUNT(*) FROM ASSET WHERE SERIALNUM IS NULL AND STATUS = 'OPERATING') as missing_serial,
  (SELECT COUNT(*) FROM ASSET WHERE INSTALLDATE IS NULL AND STATUS = 'OPERATING') as missing_install,
  (SELECT COUNT(*) FROM ASSET WHERE LOCATION IS NULL AND STATUS = 'OPERATING') as missing_location,
  (SELECT COUNT(*) FROM ASSET WHERE PARENT IS NULL AND STATUS = 'OPERATING') as no_parent,
  (SELECT COUNT(*) FROM ASSET WHERE STATUS = 'OPERATING') as total_operating
FROM SYSIBM.SYSDUMMY1;
```

Duplicate Detection:

```sql
-- Potential duplicate assets
SELECT SERIALNUM, MANUFACTURER, COUNT(*) as count
FROM ASSET
WHERE STATUS = 'OPERATING'
  AND SERIALNUM IS NOT NULL
GROUP BY SERIALNUM, MANUFACTURER
HAVING COUNT(*) > 1;
```

Orphan Records:

```sql
-- Work orders on non-existent assets
SELECT COUNT(*)
FROM WORKORDER w
WHERE w.ASSETNUM IS NOT NULL
  AND NOT EXISTS (SELECT 1 FROM ASSET a WHERE a.ASSETNUM = w.ASSETNUM AND a.SITEID = w.SITEID);

-- Assets at non-existent locations
SELECT COUNT(*)
FROM ASSET a
WHERE a.LOCATION IS NOT NULL
  AND NOT EXISTS (SELECT 1 FROM LOCATIONS l WHERE l.LOCATION = a.LOCATION AND l.SITEID = a.SITEID);
```

Record your findings:

Metric	Count	% of Total	Action Required
Assets missing manufacturer			
Assets missing serial number			
Assets missing location			
Potential duplicate assets			
Orphan work orders			
Orphan assets			

Phase 2: Data Cleansing

2.1 Master Data Cleanup

Organizations & Sites:

- [ ] Review organization structure - still valid?
- [ ] Review site definitions - consolidation needed?
- [ ] Verify GL account mappings
- [ ] Clean up unused organizations/sites

Locations:

- [ ] Verify location hierarchy is correct
- [ ] Remove decommissioned locations (or mark inactive)
- [ ] Standardize location descriptions
- [ ] Verify address data for shipping locations
- [ ] Check location types are consistently applied

Assets:

- [ ] Resolve duplicate assets (merge or delete)
- [ ] Fill missing manufacturer data
- [ ] Fill missing model/serial numbers
- [ ] Verify asset-location relationships

- [ ] Verify parent-child relationships
- [ ] Standardize asset descriptions
- [ ] Review and clean asset specifications
- [ ] Verify classification/class structure assignments
- [ ] Remove decommissioned assets (or mark DECOMMISSIONED)

Items (Spare Parts):

- [ ] Resolve duplicate item numbers
- [ ] Standardize item descriptions
- [ ] Verify item-asset relationships (spare parts)
- [ ] Clean up unused items (no transactions, no inventory)
- [ ] Verify commodity codes
- [ ] Verify units of measure

Vendors:

- [ ] Remove duplicate vendors
- [ ] Verify vendor status (active/inactive)
- [ ] Clean up address data
- [ ] Verify default payment terms

Companies:

- [ ] Merge duplicate company records
- [ ] Verify company type assignments
- [ ] Update contact information

2.2 Transactional Data Decisions

Work Order History:

- [ ] Decide retention period: _____ years
- [ ] Archive work orders older than retention period
- [ ] Verify all work orders to migrate have valid asset references
- [ ] Clean up work orders in draft/open status (cancel or complete)
- [ ] Decide on migrating: Labor transactions? Material transactions? Tool transactions?

Purchase History:

- [ ] Decide retention period: _____ years
- [ ] Archive POs older than retention period
- [ ] Cancel ancient open POs
- [ ] Verify vendor references on POs to migrate

Inventory Transactions:

- [ ] Decide retention period: _____ years
- [ ] Archive transactions older than retention period
- [ ] Verify current balances are accurate

Service Desk History:

- [ ] Decide retention period: _____ years
- [ ] Archive tickets older than retention period
- [ ] Close ancient open tickets

2.3 Configuration Data Cleanup

Failure Codes:

- [ ] Review failure hierarchies - consolidate duplicates
- [ ] Remove unused failure codes
- [ ] Verify failure code associations with asset classes

Job Plans:

- [ ] Review job plan library - remove unused
- [ ] Verify job plan labor/material/tool references
- [ ] Update outdated task instructions

PM Records:

- [ ] Review PM definitions - remove obsolete

- [ ] Verify PM-asset associations
- [ ] Verify PM-job plan associations
- [ ] Recalculate PM frequencies if needed

Routes:

- [ ] Review route definitions
- [ ] Remove routes for decommissioned assets
- [ ] Verify route stop sequences

Safety Plans:

- [ ] Review safety plan library
- [ ] Verify hazard references
- [ ] Update outdated procedures

Phase 3: Data Export

3.1 Export Sequence

Export in this order to maintain referential integrity:

Tier 1: Foundation Data (No dependencies)

1. [ ] Organizations (ORGANIZATION)
2. [ ] Sites (SITE)
3. [ ] GL Components (GLCOMPONENTS)
4. [ ] Currency (CURRENCY)
5. [ ] Exchange Rates (EXCHANGE)
6. [ ] Tax Codes (TAX)

Tier 2: Reference Data (Depends on Tier 1)

1. [ ] Persons (PERSON)
2. [ ] Labor (LABOR)
3. [ ] Crafts (CRAFT)
4. [ ] Labor Craft Rate (LABORCRAFTRATE)
5. [ ] Calendars (CALENDAR)
6. [ ] Calendar Shifts (CALENDARSHIFT)
7. [ ] Modifiers (MODIFIERS)
8. [ ] Work Type (WORKTYPE)
9. [ ] Work Priority (WOPRIORITY)

Tier 3: Classification & Codes (Depends on Tiers 1-2)

1. [ ] Classification (CLASSSTRUCTURE)
2. [ ] Class Spec (CLASSSPEC)
3. [ ] Failure Codes (FAILURECODE, FAILURELIST)
4. [ ] Commodity Codes (COMMODITIES)
5. [ ] Commodity Groups (COMMODITYGROUP)
6. [ ] Condition Codes (CONDITION)
7. [ ] Units of Measure (MEASUREUNIT)
8. [ ] Meter Groups (METERGROUP)
9. [ ] Meter (METER)

Tier 4: Company & Vendor Data (Depends on Tiers 1-3)

1. [ ] Companies (COMPANIES)
2. [ ] Company Contacts (COMPCONTACT)
3. [ ] Company Master (COMPMASTER, if used)

Tier 5: Location Data (Depends on Tiers 1-4)

1. [ ] Locations (LOCATIONS)
2. [ ] Location Hierarchy (via PARENT field)
3. [ ] Location Specs (LOCATIONSPEC)
4. [ ] Location Meters (LOCATIONMETER)

Tier 6: Asset Data (Depends on Tiers 1-5)

1. [ ] Assets (ASSET)
2. [ ] Asset Hierarchy (via PARENT field)

3. [ ] Asset Specs (ASSETSPEC)
4. [ ] Asset Meters (ASSETMETER)
5. [ ] Moving Assets (if used)
6. [ ] Asset Features (if used)

Tier 7: Inventory Data (Depends on Tiers 1-6)

1. [ ] Items (ITEM)
2. [ ] Item Specs (ITEMSPEC)
3. [ ] Storerooms (STOREROOM in LOCATIONS)
4. [ ] Inventory (INVENTORY)
5. [ ] Inventory Balances (INVBALANCES)
6. [ ] Inventory Costs (INVCOST)
7. [ ] Spare Parts (SPAREPART - item-asset relationships)

Tier 8: Maintenance Setup (Depends on Tiers 1-7)

1. [ ] Job Plans (JOBPLAN)
2. [ ] Job Plan Labor (JOBLABOR)
3. [ ] Job Plan Material (JOBMATERIAL)
4. [ ] Job Plan Tool (JOBTOOL)
5. [ ] Job Plan Tasks (JOBTASK)
6. [ ] Routes (ROUTE)
7. [ ] Route Stops (ROUTE_STOP)
8. [ ] Safety Plans (SAFETYPLAN)
9. [ ] Safety Hazards (HAZARD)
10. [ ] PM Master (PM)
11. [ ] PM Sequences (PMSEQUENCE, if used)
12. [ ] PM Forecast (PMFORECAST)

Tier 9: Transactional Data (Depends on Tiers 1-8)

1. [ ] Work Orders (WORKORDER)
2. [ ] Work Order Tasks (WOACTIVITY, WOTASK)
3. [ ] Actual Labor (LABTRANS)
4. [ ] Actual Materials (MATUSETRANS)
5. [ ] Actual Tools (TOOLTRANS)
6. [ ] Work Order Specs (WORKORDERSPEC)
7. [ ] Work Order Failure Reporting (FAILUREREPORT)

Tier 10: Procurement Data (If migrating)

1. [ ] Purchase Requisitions (PR)
2. [ ] PR Lines (PRLINE)
3. [ ] Purchase Orders (PO)
4. [ ] PO Lines (POLINE)
5. [ ] Receipts (MATRECTRANS)
6. [ ] Invoices (INVOICE, if separate from ERP)

Tier 11: Service Desk Data (If migrating)

1. [ ] Tickets/Service Requests (TICKET or SR)
2. [ ] Incidents (INCIDENT)
3. [ ] Problems (PROBLEM)
4. [ ] Solutions (SOLUTION)
5. [ ] Knowledge Base (KBANSWER)

Tier 12: Supporting Data

1. [ ] Document Links (DOCLINKS) - plan for document migration
2. [ ] Communication Logs (COMMLOG)
3. [ ] Work Log (WORKLOG)
4. [ ] Custom table data

3.2 Export Format

Recommended: CSV with defined specifications

Table	File Name	Delimiter	Encoding	Date Format
ASSET	ASSET_export.csv	Pipe ( )	UTF-8	YYYY-MM-DD
LOCATIONS	LOCATIONS_export.csv	Pipe ( )	UTF-8	YYYY-MM-DD
WORKORDER	WORKORDER_export.csv	Pipe ( )	UTF-8	YYYY-MM-DD HH:MM:SS

... ...

Why pipe delimiter: Commas appear in descriptions, addresses, etc.

Export Query Template:

```
-- Export ASSET to CSV
SELECT
  ASSETNUM,
  DESCRIPTION,
  SITEID,
  LOCATION,
  PARENT,
  ASSETTYPE,
  STATUS,
  MANUFACTURER,
  MODELNUM,
  SERIALNUM,
  INSTALLDATE,
  PURCHASEPRICE,
  REPLACECOST,
  PRIORITY,
  CALNUM,
  SHIFTNUM,
  CLASSSTRUCTUREID,
  FAILURECODE,
  ISRUNNING,
  PLUSPCUSTOMER,
  -- Add all required fields
  CHANGEBY,
  CHANGEDATE
FROM ASSET
WHERE SITEID IN ('SITE1', 'SITE2')  -- Limit to sites being migrated
ORDER BY ASSETNUM;
```

Phase 4: Data Transformation

4.1 Field Mapping

Map Maximo 7.x fields to MAS 9 fields. Most are 1:1 but some require transformation.

ASSET Mapping:

Maximo 7.x Field	MAS 9 Field	Transformation	Notes
ASSETNUM	ASSETNUM	None	Primary key
DESCRIPTION	DESCRIPTION	Truncate to 100 chars	Verify length limits
SITEID	SITEID	None	Must exist in MAS
ORGID	ORGID	None	Must exist in MAS
LOCATION	LOCATION	None	Must exist in MAS
PARENT	PARENT	None	Validate exists
ASSETTYPE	ASSETTYPE	None	Verify domain
STATUS	STATUS	None	Verify domain
STATUSDATE	STATUSDATE	Date format	YYYY-MM-DD
MANUFACTURER	MANUFACTURER	Company lookup	Verify exists
VENDOR	VENDOR	Company lookup	Verify exists
MODELNUM	MODELNUM	None	
SERIALNUM	SERIALNUM	None	
INSTALLDATE	INSTALLDATE	Date format	YYYY-MM-DD
PURCHASEPRICE	PURCHASEPRICE	Decimal(10,2)	
REPLACECOST	REPLACECOST	Decimal(10,2)	
TOTALCOST	TOTALCOST	Decimal(10,2)	
YTDCOST	YTDCOST	Decimal(10,2)	
BUDGETCOST	BUDGETCOST	Decimal(10,2)	
PRIORITY	PRIORITY	Integer	Verify domain
CALNUM	CALNUM	None	Verify exists

SHIFTNUM	SHIFTNUM	None	Verify exists
CLASSSTRUCTUREID	CLASSSTRUCTUREID	None	Verify exists
FAILURECODE	FAILURECODE	None	Verify exists
ISRUNNING	ISRUNNING	Y/N	
MAINTHIERCHY	MAINTHIERCHY	None	
ITEMNUM	ITEMNUM	None	Rotating item
ITEMSETID	ITEMSETID	None	
BINNUM	BINNUM	None	Rotating
PLUSCISMTE	PLUSCISMTE	Y/N	Calibration
EQ1-EQ24	(custom fields)	Map to specifications	

WORKORDER Mapping:

Maximo 7.x Field	MAS 9 Field	Transformation	Notes
WONUM	WONUM	None	Primary key
DESCRIPTION	DESCRIPTION	Truncate if needed	
LONGDESCRIPTION	DESCRIPTION_LONGDESCRIPTION	HTML cleanup	Remove unsupported tags
SITEID	SITEID	None	
ASSETNUM	ASSETNUM	None	Validate exists
LOCATION	LOCATION	None	Validate exists
WORKTYPE	WORKTYPE	None	Verify domain
STATUS	STATUS	None	Verify domain
STATUSDATE	STATUSDATE	Datetime	
WOPRIORITY	WOPRIORITY	Integer	
SCHEDSTART	SCHEDSTART	Datetime	
SCHEDFINISH	SCHEDFINISH	Datetime	
ACTSTART	ACTSTART	Datetime	
ACTFINISH	ACTFINISH	Datetime	
ESTDUR	ESTDUR	Decimal	Hours
ACTLABHRS	ACTLABHRS	Decimal	
ACTMATCOST	ACTMATCOST	Decimal	
ACTLABCOST	ACTLABCOST	Decimal	
ACTTOOLCOST	ACTTOOLCOST	Decimal	
ACTSERVCOST	ACTSERVCOST	Decimal	
REPORTEDBY	REPORTEDBY	Person lookup	Verify exists
REPORTDATE	REPORTDATE	Datetime	
LEAD	LEAD	Labor lookup	Verify exists
SUPERVISOR	SUPERVISOR	Person lookup	Verify exists
PMNUM	PMNUM	None	PM reference
JPNUM	JPNUM	None	Job plan reference
FAILURECODE	FAILURECODE	None	
PROBLEMCODE	PROBLEMCODE	None	
FINCNTRLID	FINCNTRLID	None	GL account
GLACCOUNT	GLACCOUNT	None	

4.2 Data Validation Rules

Run these validations on transformed data before loading:

Referential Integrity:

```sql
-- Assets reference valid locations
SELECT a.ASSETNUM, a.LOCATION
FROM ASSET_STAGING a
WHERE a.LOCATION IS NOT NULL
  AND NOT EXISTS (SELECT 1 FROM LOCATIONS_STAGING l
                  WHERE l.LOCATION = a.LOCATION
                  AND l.SITEID = a.SITEID);

-- Work orders reference valid assets
SELECT w.WONUM, w.ASSETNUM
FROM WORKORDER_STAGING w
WHERE w.ASSETNUM IS NOT NULL
  AND NOT EXISTS (SELECT 1 FROM ASSET_STAGING a
                  WHERE a.ASSETNUM = w.ASSETNUM
                  AND a.SITEID = w.SITEID);

-- PMs reference valid assets
SELECT p.PMNUM, p.ASSETNUM
FROM PM_STAGING p
WHERE p.ASSETNUM IS NOT NULL
  AND NOT EXISTS (SELECT 1 FROM ASSET_STAGING a
                  WHERE a.ASSETNUM = p.ASSETNUM
                  AND a.SITEID = p.SITEID);
```

Domain Validation:

```sql
-- Status values in allowed list
SELECT ASSETNUM, STATUS
FROM ASSET_STAGING
WHERE STATUS NOT IN ('OPERATING', 'NOT READY', 'DECOMMISSIONED', 'SEALED');

-- Priority values in range
SELECT ASSETNUM, PRIORITY
FROM ASSET_STAGING
WHERE PRIORITY NOT BETWEEN 1 AND 5;
```

Data Type Validation:

```sql
-- Numeric fields contain valid numbers
SELECT ASSETNUM, PURCHASEPRICE
FROM ASSET_STAGING
WHERE PURCHASEPRICE IS NOT NULL
  AND PURCHASEPRICE NOT REGEXP '^[0-9]+\.?[0-9]*{{content}}#x27;;

-- Date fields contain valid dates
SELECT ASSETNUM, INSTALLDATE
FROM ASSET_STAGING
WHERE INSTALLDATE IS NOT NULL
  AND INSTALLDATE NOT REGEXP '^[0-9]{4}-[0-9]{2}-[0-9]{2}{{content}}#x27;;
```

Uniqueness Validation:

```sql
-- No duplicate asset numbers per site
SELECT ASSETNUM, SITEID, COUNT(*)
FROM ASSET_STAGING
GROUP BY ASSETNUM, SITEID
HAVING COUNT(*) > 1;

-- No duplicate location codes per site
SELECT LOCATION, SITEID, COUNT(*)
FROM LOCATIONS_STAGING
GROUP BY LOCATION, SITEID
HAVING COUNT(*) > 1;
```

Phase 5: MAS 9 Environment Setup

5.1 Pre-Load Configuration

Organizations & Sites:

- [ ] Create organizations in MAS 9
- [ ] Create sites in MAS 9
- [ ] Configure site defaults (storeroom, calendar, etc.)
- [ ] Configure GL accounts

Security:

- [ ] Create security groups matching source
- [ ] Map users to groups
- [ ] Configure application-level security
- [ ] Set up condition restrictions (if used)

System Configuration:

- [ ] Configure system properties
- [ ] Set up cron tasks schedule
- [ ] Configure bulletin board (if used)
- [ ] Set up email configuration

Domains & Lookups:

- [ ] Load/verify synonym domains match source
- [ ] Load/verify ALN domains match source
- [ ] Load/verify numeric domains match source
- [ ] Configure crossover domains

Classifications:

- [ ] Load class structure
- [ ] Load class specifications
- [ ] Verify attribute data types

5.2 Load Sequence

Load data in this sequence:

1. [ ] Reference data (domains, UoM, currencies)
2. [ ] Classifications
3. [ ] Failure codes
4. [ ] Calendars
5. [ ] Persons and Labor
6. [ ] Companies
7. [ ] Locations
8. [ ] Assets
9. [ ] Items
10. [ ] Inventory
11. [ ] Spare parts relationships
12. [ ] Job plans
13. [ ] Routes
14. [ ] Safety plans
15. [ ] PM records
16. [ ] Work orders (historical)
17. [ ] Transactions (labor, material, tools)
18. [ ] Service desk records
19. [ ] Document links

Phase 6: Validation & Testing

6.1 Record Count Reconciliation

Object	Source Count	Target Count	Variance	Status
Organizations				
Sites				
Locations				
Assets				
Items				
Inventory Balances				
Companies				
Persons				

Labor Records
Job Plans
PM Records
Work Orders
Labor Transactions
Material Transactions

6.2 Sample Data Validation

Select 20-50 records per object type. Verify field-by-field accuracy.

Asset Validation Sample:

ASSETNUM	Field	Source Value	Target Value	Match?
AST-001	Description			
AST-001	Location			
AST-001	Manufacturer			
AST-001	Install Date			
AST-002	Description			
...	...	...	...	...

6.3 Functional Testing

Asset Management:

- [ ] Can view asset details
- [ ] Can view asset hierarchy (parent/children)
- [ ] Can view asset specifications
- [ ] Can view asset meters
- [ ] Can view work order history
- [ ] Can view cost history
- [ ] Can create new asset
- [ ] Can move asset

Work Management:

- [ ] Can view work order details
- [ ] Can view work order tasks
- [ ] Can view labor, material, tool actuals
- [ ] Can view failure reporting
- [ ] Can create new work order
- [ ] Can apply job plan
- [ ] PM generation works
- [ ] Route generation works

Inventory:

- [ ] Can view inventory balances
- [ ] Can view item details
- [ ] Can view spare parts for asset
- [ ] Can issue material
- [ ] Can receive material
- [ ] Can transfer material
- [ ] Reorder point processing works

Procurement:

- [ ] Can create PR
- [ ] Can create PO
- [ ] Can receive against PO
- [ ] Approval workflow works

Reporting:

- [ ] Key reports run successfully
- [ ] Data in reports matches expectations
- [ ] KPIs calculate correctly

6.4 Integration Testing

- [ ] ERP integration (PO, receipt, GL)
- [ ] HR integration (person sync)
- [ ] IoT/sensor integration
- [ ] GIS integration
- [ ] Mobile app connectivity
- [ ] Document management integration

Phase 7: Cutover

7.1 Pre-Cutover Checklist

2 Weeks Before:

- [ ] Final user acceptance sign-off
- [ ] Go/No-Go criteria defined
- [ ] Rollback plan documented
- [ ] Support team briefed
- [ ] User communication sent

1 Week Before:

- [ ] Delta load requirements identified
- [ ] Cutover runbook finalized
- [ ] Team roles and responsibilities confirmed
- [ ] Contact list distributed
- [ ] War room scheduled

Day Before:

- [ ] System health check (source and target)
- [ ] Backup source system
- [ ] Verify target system access
- [ ] Notify users of downtime window

7.2 Cutover Runbook

Step	Task	Owner	Est. Duration	Actual Start	Actual End	Status
1	Disable source system access		15 min			
2	Final source data export		2 hrs			
3	Transform delta data		1 hr			
4	Load delta data to target		2 hrs			
5	Reconcile record counts		1 hr			
6	Validate sample records		2 hrs			
7	Run smoke tests		1 hr			
8	Enable target system access		15 min			
9	Go/No-Go decision		30 min			
10	Notify users of go-live		15 min			

7.3 Post-Cutover

Day 1:

- [ ] Monitor system performance
- [ ] Monitor error logs
- [ ] Support team on standby
- [ ] Hourly check-ins with key users
- [ ] Document issues

Week 1:

- [ ] Daily check-ins with key users
- [ ] Address critical issues
- [ ] Performance tuning
- [ ] Integration monitoring

Month 1:

- [ ] Weekly review meetings
- [ ] Training reinforcement

- [ ] Process refinement
- [ ] Issue resolution
- [ ] Lessons learned documentation

Appendix: Common Issues & Solutions

Issue	Cause	Solution
Duplicate key errors on load	Record already exists	Check for existing data, use update vs insert
Foreign key constraint failures	Parent record missing	Verify load sequence, load parents first
Character encoding issues	UTF-8 mismatch	Ensure consistent encoding in export/import
Date format errors	Locale differences	Use ISO format (YYYY-MM-DD)
Truncation errors	Field length exceeded	Truncate long values, document truncations
Invalid domain values	Domain not configured	Load domain values before transactional data
Missing classifications	Class structure not loaded	Load classifications before assets
Broken asset hierarchies	Parent loaded after child	Sort by hierarchy level before loading
PM generation failure	Calendar/frequency issue	Verify calendars, recalculate forecasts
Integration failures	Endpoint changes	Update integration configurations

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Appendix: Key Contacts

Role	Name	Email	Phone
Project Manager			
Technical Lead			
Maximo SME			
IBM Support			
DBA			
Integration Lead			
Business Owner			

Need help with your Maximo to MAS 9 migration? AssetStage provides data staging, transformation, and validation services to ensure clean data migration. Contact us at sales@assetstage.io

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