



Maximo to MAS 9 Migration Checklist

A structured guide to help organizations prepare for migration, including data cleanup, ISO 14224 hierarchy building, and validation steps.

Upgrading from IBM Maximo to MAS 9 (Maximo Application Suite) is a major step forward in capability and user experience. Success depends on data quality, structured hierarchies, and a controlled migration process. This checklist outlines key activities before, during, and after migration.

1. Pre-Migration Preparation

- Define migration scope: sites, assets, work orders, and historical data to be included.
- Engage stakeholders early: IT, maintenance, reliability, operations, and compliance.
- Stand up a staging environment to test migrations safely.
- Backup existing Maximo database and configurations before any migration trial.
- Document integrations (ERP, SCADA, procurement) for re-validation in MAS 9.

2. Data Cleanup Stage

- Remove duplicate assets, locations, and work orders.
- Standardize asset descriptions using naming conventions.
- Validate mandatory fields (location, classification, asset numbers).
- Eliminate obsolete codes and inactive failure modes.
- Align attributes with ISO 14224 requirements where applicable.
- Use AssetStage to stage, validate, and clean data before import.

3. Build ISO 14224 Hierarchies

- Define asset classes, subclasses, and equipment types per ISO 14224.
- Create failure codes and modes aligned with historical failure data.
- Structure hierarchy: Enterprise > Site > Area > System > Equipment.
- Ensure location and asset trees align to ISO 14224 taxonomy.
- Validate hierarchy depth with criticality and maintenance strategies.
- Use staging environment to simulate hierarchy in MAS 9 before go-live.

4. Migration Execution

- Export data from Maximo in agreed format (CSV, XML, APIs).
- Transform datasets to MAS 9 templates.
- Load into staging MAS 9 environment and validate record counts.
- Check integrations: ensure ERP and SCADA links function post-migration.
- Run user acceptance testing (UAT) with real maintenance scenarios.
- Sign-off from IT, maintenance, and reliability before production cutover.

5. Post-Migration Activities

- Audit migrated data for completeness and accuracy.
- Verify dashboards, KPIs, and reports work with new data structures.
- Conduct user training focused on MAS 9 interface and new features.
- Resolve open defects from UAT and track in an issue log.
- Schedule periodic audits to ensure ISO 14224 compliance continues.
- Establish governance for ongoing master data management.

6. Migration Checklist Summary

- ✓ Migration scope defined and stakeholders engaged.
- ✓ Backup completed and staging environment ready.
- ✓ Data cleanup completed: duplicates removed, codes standardized.
- ✓ ISO 14224 hierarchy built and validated in staging.
- ✓ Migration executed with UAT completed and approved.
- ✓ Post-migration audits and governance established.

AssetStage helps accelerate the migration by providing data cleanup, staging, and ISO 14224 validation tools tailored for Maximo to MAS 9 transitions.