

# Maximo to MAS 9 Migration Checklist

## *Complete Data Preparation Guide for IBM Maximo Application Suite Migration*

AssetStage

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### Complete Data Preparation Guide for IBM Maximo Application Suite Migration

#### Before You Start

##### What's Different in MAS 9

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

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## **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)
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ASSET

LOCATIONS

WORKORDER

WOACTIVITY

MATUSETRANS

LABTRANS

TOOLTRANS

INVENTORY

INVBALANCES

ITEM

PO

PR

CONTRACT

TICKET (SR)

INCIDENT

PROBLEM

PERSON

Object	Record Count	Active Records	Data Size (GB)
--------	--------------	----------------	----------------

LABOR

CRAFT

FAILURECODE

COMMLOG

DOCLINKS

**TOTAL**

## 1.4 Data Quality Assessment

Run these queries to assess data health:

### Asset Data Quality:

*-- 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:

*-- 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:

*-- 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
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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

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## 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)
1. ☐ Labor (LABOR)
2. ☐ Crafts (CRAFT)
3. ☐ Labor Craft Rate (LABORCRAFTRATE)
4. ☐ Calendars (CALENDAR)
5. ☐ Calendar Shifts (CALENDARSHIFT)
6. ☐ Modifiers (MODIFIERS)
7. ☐ Work Type (WORKTYPE)
8. ☐ 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 (MATUSETTRANS)
- 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
LOCATIONS	LOCATIONS_export.csv	Pipe ( )		UTF-8
WORKORDER	WORKORDER_export.csv	Pipe ( )		UTF-8
...	...	...	...	...

**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	

Maximo 7.x Field	MAS 9 Field	Transformation	Notes
INSTALLDATE	INSTALLDATE	Date format	YYYY-MM-DD
PURCHASEPRICE	PURCHASEPRICE	Decimal(10,2)	
REPLACECOST	REPLACECOST	Decimal(10,2)	
TOTALCOST	TOTALCOST	Decimal(10,2)	
YTD COST	YTD COST	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	
MAINT HIERCHY	MAINT HIERCHY	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	
<b>WORKORDER Mapping:</b>			
Maximo 7.x Field	MAS 9 Field	Transformation	Notes
WONUM	WONUM	None	Primary key

Maximo 7.x Field	MAS 9 Field	Transformation	Notes
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

Maximo 7.x Field	MAS 9 Field	Transformation	Notes
			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:

```
-- 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:

```
-- 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:

```
-- Numeric fields contain valid numbers
SELECT ASSETNUM, PURCHASEPRICE
FROM ASSET_STAGING
WHERE PURCHASEPRICE IS NOT NULL
AND PURCHASEPRICE NOT REGEXP '^[0-9]+\.[0-9]*$';

-- 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}$';
```

#### Uniqueness Validation:

```
-- 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

Object	Source Count	Target Count	Variance	Status
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		1 hr			

Step	Task	Owner	Est. Duration	Actual Start	Actual End	Status
	tests					
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

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## 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			

Role	Name	Email	Phone
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DBA			
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Integration Lead			
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Business Owner			
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*Need help with your CMMS migration? AssetStage provides data staging, transformation, and validation services for any CMMS platform. Contact us at [sales@assetstage.io](mailto:sales@assetstage.io)*

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