

# Populating Maximo with PREMO XPERTS Data

Integrating Maximo's asset management with PREMO XPERTS' reliability improvement capabilities makes sense: PREMO XPERTS determines which assets are critical, develops a comprehensive strategy, and bundles it into optimized performance groups while Maximo plans and schedules the work, develops the work packages, and documents the resulting activity.

The Maximo modules used to plan and schedule preventive maintenance can be directly updated using PREMO XPERTS, which eliminates redundant data management. PREMO XPERTS enables users to dynamically upload equipment information, cause codes, and PM task recommendations directly into Maximo, saving the time and effort of loading the information manually. Integrating the two systems overcomes the majority of implementation issues and reduces project resource needs.

There are three distinct methods that make this possible: 1) Batch updates, which synchronizes PREMO XPERTS and Maximo data, 2) Individually updating changes made to PREMO XPERTS, and 3) PM Program updates, which establishes and maintains the Master PMs in Maximo.

How to use each method is discussed below.

## Updating Maximo through Batch Operations

The first step is to update Maximo with information previously generated in PREMO XPERTS. This includes Equipment Types, Unit IDs, System IDs, Equipment IDs, and Craft codes. The hierarchical capability of Maximo's Equipment module is exercised by establishing the Unit – System – Equipment parent-child relationships during updates. Craft codes are added to support updating Maximo's Master PM data. Equipment Types update Maximo's Failure Code module.

Batch updating can be used if your facility is engaged in data conversion from a legacy maintenance management system to Maximo. PREMO XPERTS® acts as the transition can be used as a go-between Data can be 'cleaned up' and validated in PREMO XPERTS® before completing the migration.

Batch updating requires administrative level security clearance. The Batch screen is reached through the *Administration Module – Options & Security* tab as shown in Figure 1.

Clicking the *Update Maximo* button opens the *Maximo Batch Operations* dialog box shown in Figure 2.

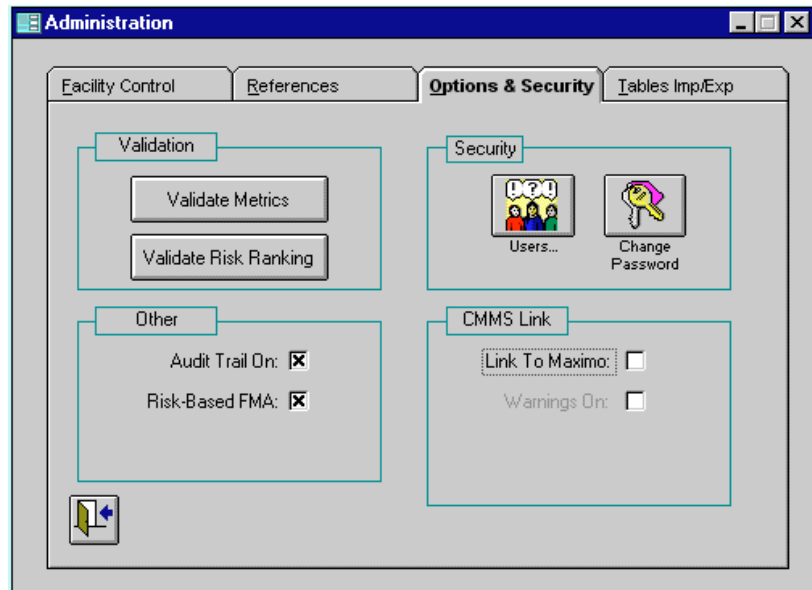


Figure 1: Administrative Form

Choosing the default settings for the first update will ensure that the proper information and relationships are established in Maximo.

Future batch operations will add new data to Maximo with the *Append New* option, or update related data already existing in Maximo with the *Update Existing* option.

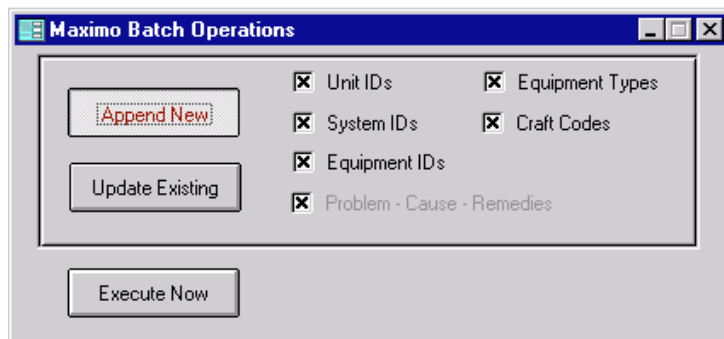


Figure 2: Maximo Batch Operations form

## Individual Updates

Once Maximo and PREMO XPERTS are synchronized, the most direct way to maintain data concurrency is through single record updates as the changes occur. A user is prompted during record changes to update Maximo. PREMO XPERTS will give this prompt if a new record is added or an existing record is changed.

It is important to note that a prompt will not be given when an existing record in PREMO XPERTS is deleted. Because Maximo uses equipment data in many related modules, PREMO XPERTS is not cognizant of the consequences if a delete action would occur.

PREMO XPERTS™ monitors several modules looking for changes. This includes *Equipment Type Reference*, *PM Equipment List*, *System Description and Function*, *Systems*, *Department*, and the *Facility's Units* forms.

Tables are not directly monitored. If changes are made to table data within PREMO XPERTS, then use the Batch Operation process to re-synchronize the systems.

When a user makes a change to a record the message in Figure 3 will display.

Selecting 'Yes' will initiate the update action.

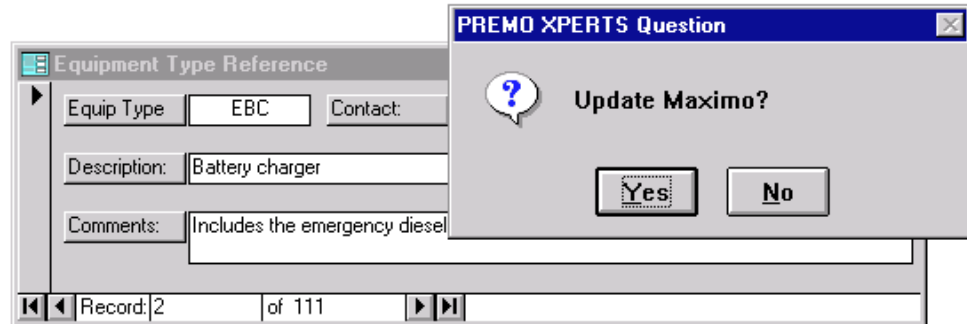


Figure 3: Individual Update Message

## PM Program Updates

PM Masters and Job Plans are developed in the Performance Grouping module. The performance grouping form is similar to Maximo's Job Plan screen. Tasks are grouped under their respective Equipment IDs to form Job Plans. Their assigned performance sequence becomes the Job Operation.

The Performance Grouping module is populated from approved Task Recommendations and implemented Credited PM Tasks. When the Performance Grouping form is opened, PM task recommendations with Peer Review marked as 'Done' are culled for ungrouped tasks. A similar query is performed with Credited PM tasks with 'Implemented' status.

The resulting set is used to create new or modify existing performance groups.

Selecting Records => Update MAXIMO from the drop down menu initiates the update action.

The update action appends new groups to Maximo's PM Master, Job Plan, and Job Operation.

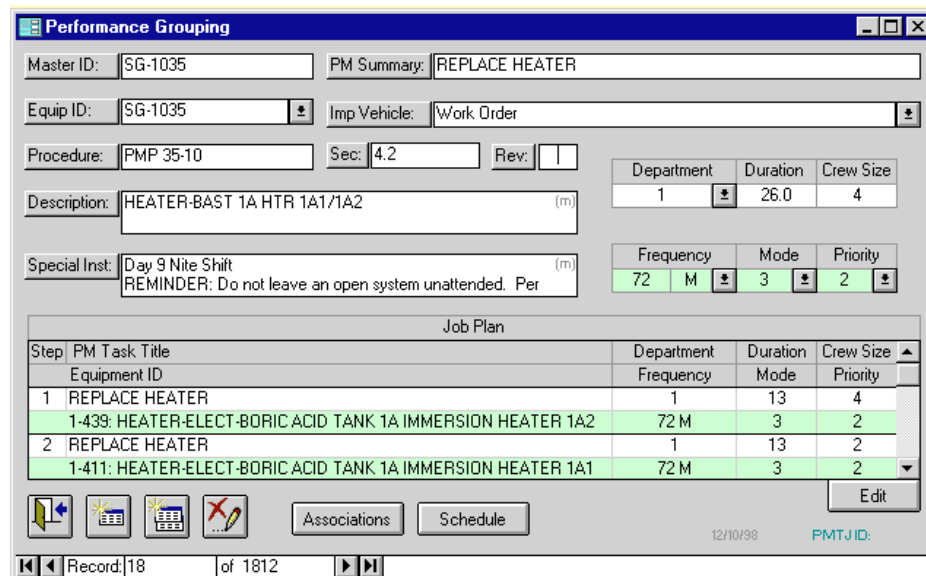
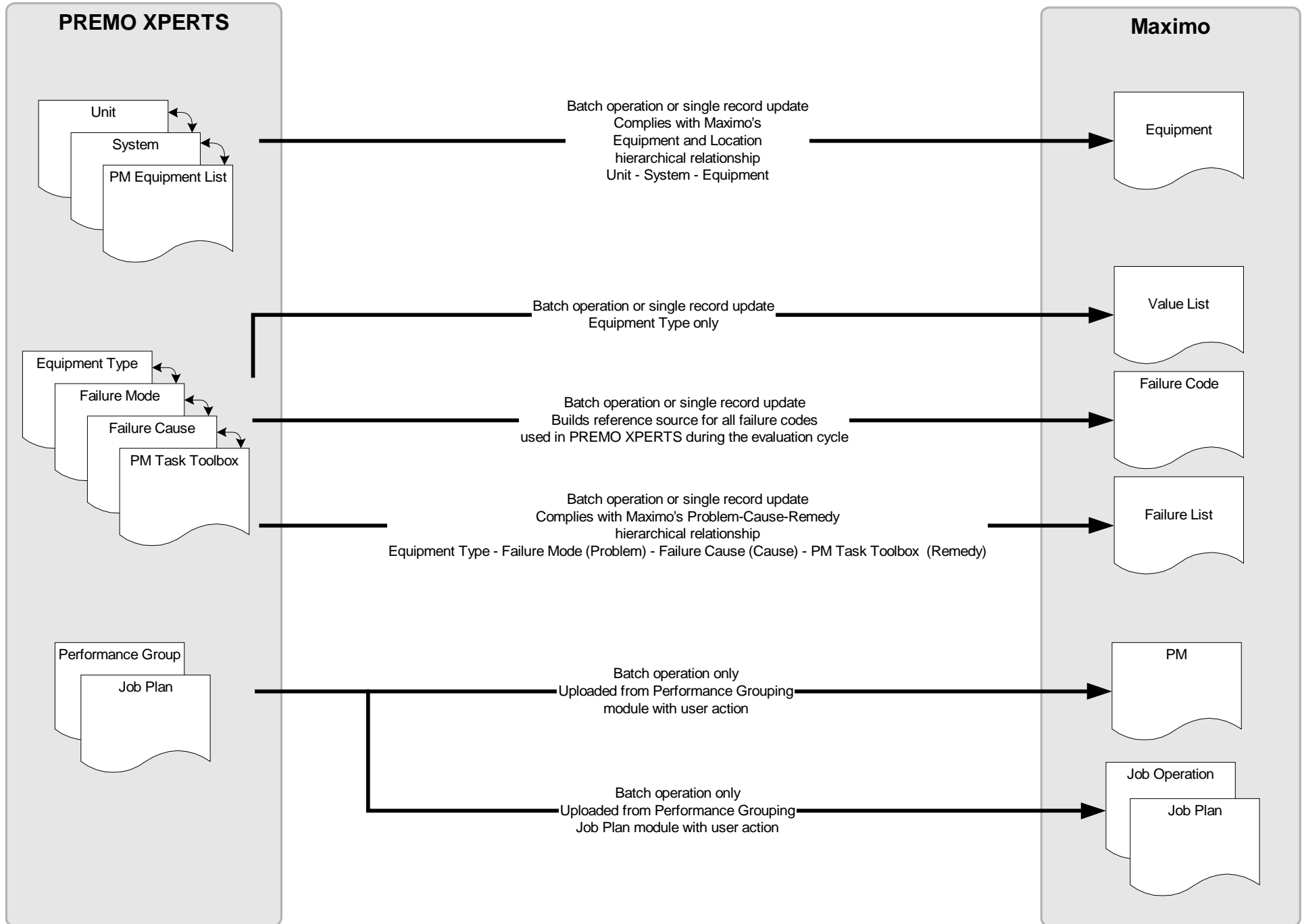
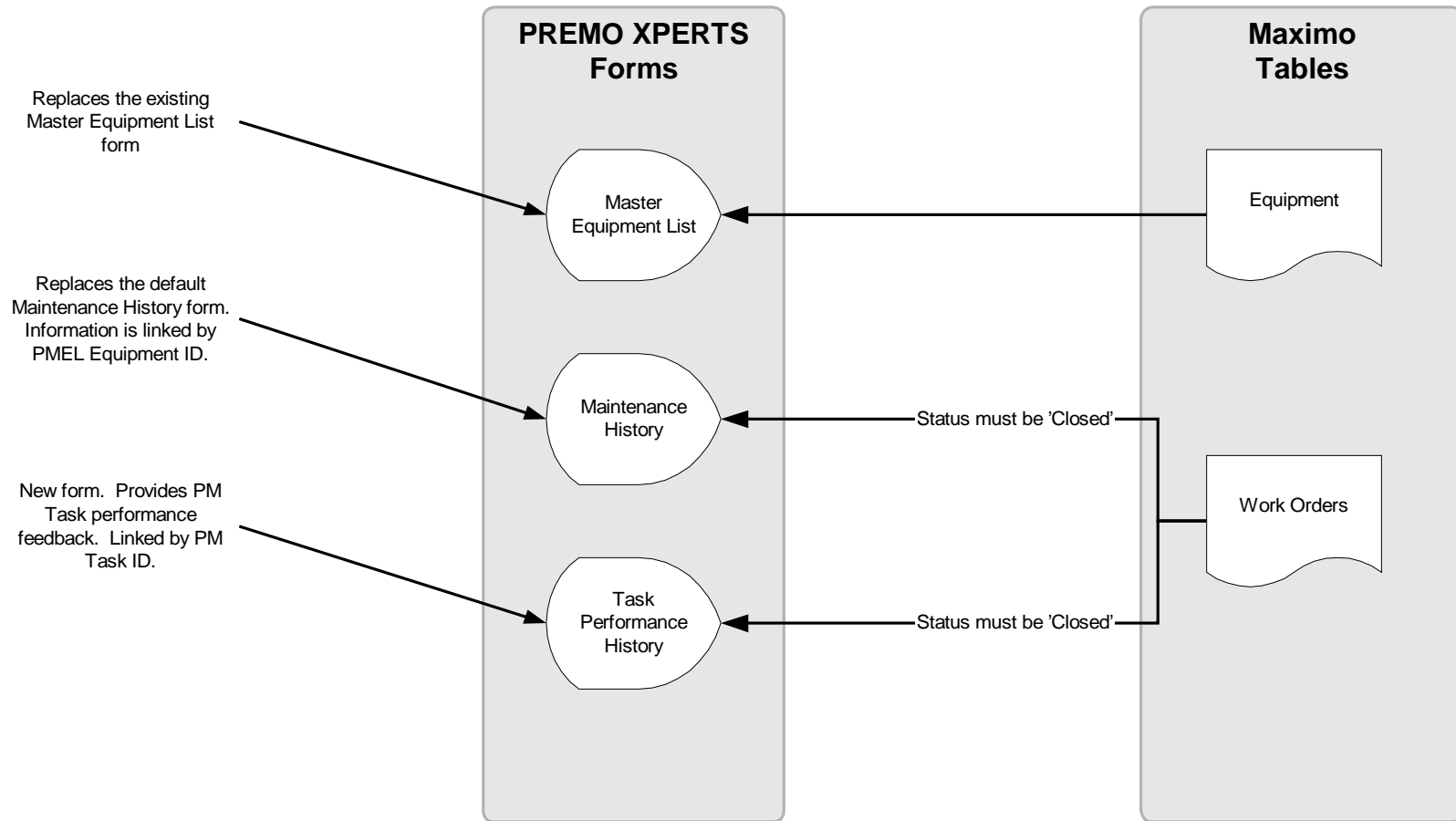


Figure 4: Performance Grouping

# Data Links To Maximo



# Maximo Links To PREMO XPERTS



# Re-evaluation Trigger

