CMMS and EAM System Implementation with IBM Maximo: Assets, Work Orders and Data

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Paris - Right Bank business hotel



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Introduction:

Many organisations buy a CMMS or EAM system and still run maintenance from spreadsheets because the location structure is unclear, asset records are incomplete, job plans and PM records were never loaded and users do not trust the reports. This Core Concept course trains system owners, key users and implementation teams to configure and populate CMMS and EAM software, using IBM Maximo Application Suite as the worked example throughout. Participants build and test records in guided lab exercises and leave with an EAM System Implementation Plan and a configuration and data load workbook.

Course Objectives:

- Distinguish CMMS and EAM scope and map the organisation, site, location and asset structure an enterprise deployment needs
- Configure location hierarchies, asset records, classifications, meters and failure class codes so that asset history can be searched and analysed
- Create job plan templates, preventive maintenance records and work orders in the application and move them through their full status life cycle
- Set up item master, storeroom and reorder records and report actual labour, materials and failures against completed work orders
- Apply master data rules, legacy data migration steps, security groups and KPI reports that keep the system reliable after go-live
- Prepare an EAM System Implementation Plan covering cutover, user roles, training and adoption measures

Target Audience:

- System owners accountable for the configuration and data integrity of a CMMS or EAM application
- Key users and super-users who set up asset, location, job plan and PM records for their departments
- Maintenance and reliability engineers who depend on failure coding and asset history held in the system
- Materials and storeroom staff who maintain item records, stock levels and issues to work orders
- Implementation and data migration team members who load legacy records and support users at go-live

Course Outline:

Day 1: CMMS and EAM Scope, Product Landscape and System Health Check

- CMMS Versus EAM Scope: Maintenance Records, Asset Life Cycle and Enterprise Reach
- IBM Maximo Application Suite Capability Areas: EAM, Asset Performance Management and Asset Investment Planning
- Maximo Navigation Lab: Start Centres, List Views, Saved Queries and Bookmarks
- Organisation, Site and Shared Sets Structure Decisions for Multi-Site Deployments
- Current System Health Check: Data Gaps, Workarounds and Spreadsheet Shadow Records

Day 2: Location Hierarchy, Asset Registers and Classification Architecture

- Location Hierarchy and Systems Design for Plants, Buildings and Linear Networks
- Asset Record Set-Up: Parent-Child Links, Rotating Assets and Asset Moves
- Classification and Specification Attributes for Searchable Asset Templates
- Asset Criticality Fields, Meters and Meter Group Configuration
- Failure Class Hierarchy of Problem, Cause and Remedy Codes

Day 3: Work Order, Job Plan, PM and Inventory Records in the Application

- Work Order Tracking Lab: Status Transitions From Waiting Approval to Closed
- Job Plan Templates With Crafts, Tools, Items and Safety Plan Links
- Preventive Maintenance Records: Time and Meter Frequencies, PM Hierarchies and Forecast Generation
- Item Master, Storerooms, Reorder Points and Issues and Returns Against Work Orders
- Completion Reporting of Actual Labour, Materials, Downtime and Failure Codes

Day 4: Data Governance, Migration, Security and Reporting Controls

- Master Data Governance Rules: Naming Conventions, Mandatory Fields and Record Ownership
- Legacy Data Migration: Extraction, Cleansing, Field Mapping and Load Template Validation
- Security Groups, Role-Based Access and Approval Workflow Configuration
- KPI Portlets, Asset History Queries and Operational Reports for Supervisors and Managers
- Integration Touchpoints With Finance, Purchasing and Condition Monitoring Data

Day 5: EAM Rollout Labs and the System Implementation Plan

- Water Utility Lab: Build a Location, Asset and PM Set for a Pumping Station
- Facilities Lab: Load a Sample Asset File and Resolve Rejected Records
- Go-Live Readiness Checklist, Cutover Sequence and Hypercare Support Model
- User Adoption Plan: Role-Based Training, Super-User Network and Usage Metrics
- EAM System Implementation Plan Presentation and Peer Challenge

Skills You Will Gain:

- Location Hierarchy Design
- Asset Record Configuration
- Failure Class Coding
- Preventive Maintenance Record Set-Up
- Inventory Record Management
- Legacy Data Migration
- Role-Based Security Set-Up
- EAM User Adoption

Why Attend This Course:

- Return with an EAM System Implementation Plan and a configuration and data load workbook ready for your own rollout or clean-up
- Practise on realistic records in guided labs so that asset, PM and work order set-up can be repeated at work without guesswork
- Give engineers and managers asset history and KPI reports they can rely on because records are structured and coded consistently
- Compare CMMS and EAM set-up choices with peers from utilities, oil and gas, manufacturing, transport and facilities management

Conclusion:

A CMMS or EAM system only pays back when its structure, records and users work together. The course moves from CMMS and EAM scope and the IBM Maximo Application Suite landscape, through location hierarchies, asset records, classifications and failure classes, to work orders, job plans, PM records and inventory in the application, then data governance, migration, security and reporting. The final day applies these steps in rollout labs and produces an EAM System Implementation Plan with a configuration and data load workbook.