



Maximo to MAS upgrade checklist



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A Maximo to MAS upgrade is not a patch. It is a programme. It is also an opportunity: the only time you get a clean look at a decade or more of accumulated decisions, and the only time replacing a bad decision is cheaper than keeping it.

This is the checklist we work through with our own clients. It is not exhaustive, but it is honest about what matters.

1. Before the upgrade

1.1 1. Audit customisations against current Maximo behaviour

Every customisation should be classified into one of four buckets:

- **Now standard** — Maximo has caught up and the customisation can be retired
- **Now redundant** — the business need has changed; the customisation can be retired
- **Still needed, replatform with configuration** — preferred, because configuration survives upgrades
- **Still needed, replatform with custom code** — last resort; design with future upgrades in mind

A typical estate finds 20–40% of customisations can be retired outright. That alone justifies the audit.

1.2 2. Audit integrations

For each integration, document:

- Direction (in, out, both)
- Volume and pattern (real-time, batch, on-demand)
- Error-handling and reconciliation behaviour
- Owner on both sides

Plan to retest every integration through the upgrade, not just the ones you are ‘sure’ about.

1.3 3. Audit reports and dashboards

Reports are where customisation hides. List every report, identify the active ones (most are not), and decide which survive. The same applies to start-centre layouts, KPIs and BIRT artefacts.

1.4 4. Database health check

Database conversion (often from SQL Server to DB2, sometimes to Oracle) is part of many MAS upgrades. Before the upgrade, identify:

- Indexes that are no longer used
- Tables that have grown unboundedly because of missing housekeeping
- Custom database objects (triggers, views, stored procedures) that need to be migrated or retired

1.5 5. Asset register and data quality

Asset hierarchy, classification, location structures and master data should be cleaned before, not after, the upgrade. The upgrade does not fix bad data. It just moves it to a new platform.

1.6 6. Mobile estate review

If you are on legacy Maximo Anywhere or a third-party mobile, plan the move to Maximo Mobile. The Mobile move is often more disruptive than the application upgrade.

1.7 7. Hosting target decision

MAS deployment options include Red Hat OpenShift on cloud, IBM Cloud Pak, and various managed-service patterns. Make this decision early; the architecture and cost profile differ significantly.

1.8 8. Licensing and AppPoints assessment

MAS licensing is structured around AppPoints. Map your current Maximo footprint to MAS modules and AppPoints before signing. An authorised reseller partner can structure this alongside delivery.

2. During the upgrade

2.1 9. Trial upgrade in a non-production environment first

Always. We do this within the first week of programme start. It de-risks the production cutover by surfacing the unexpected before the cutover plan is locked.

2.2 10. Integration retest in upgrade order

Test each integration as soon as the application stack is stable enough, not at the end. Problems found late are problems found expensive.

2.3 11. Performance testing under realistic load

Performance changes in MAS are real, mostly for the better. Test with realistic concurrent-user load, realistic data volumes and the integrations turned on.

2.4 12. Cutover rehearsal

At least one full cutover rehearsal in non-production. Time everything. Identify the steps that always run long and either parallelise them or budget for them.

2.5 13. Communications plan for users

The visible UI changes will dominate user feedback even when the deep changes matter more. Plan training and communications around the parts users will see immediately.

3. After the upgrade

3.1 14. Hypercare with named engineers

Hypercare is not a generic ticket queue for the first month. It is named engineers on standby, daily standups, and an explicit triage process for issues caught after go-live. Our own model assigns the same architects who designed the upgrade to hypercare.

3.2 15. Post-go-live performance review

Two weeks after cutover, review actual performance against the baseline and against expected gains. This is where you discover whether the upgrade delivered what it promised.

3.3 16. Lessons learned, captured in Maximo

Capture lessons in the Maximo system itself (against the work order or the change record), not in a project office that disbands. The next upgrade will thank you.

3.4 17. Plan the next thing now, not later

Most MAS estates that succeed long-term plan a Mobile rollout, a Health / Monitor / Predict layered deployment, or an additional business unit within twelve months of the upgrade. Putting that on the roadmap immediately keeps momentum and protects the investment in the upgrade itself.

4. Where Maxiron fits

We do this for a living. We commit to fixed-price upgrade quotes within 24 hours of analysis and to trial upgrades within a week. We have upgraded estates from every Maximo version from 5.x onwards. If you are planning an upgrade, get in touch and we will tell you, honestly, where the risks in your specific estate are.