IBM Maximo Training Course: Beginner to Advanced Level

15 November – 3 December 2027
Lyon (France)



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Introduction:

Over 3 weeks, this IBM Maximo training course takes you from beginner to advanced level, so you can run maintenance work in Maximo Manage and then configure and administer it. You build and take back a configured end-to-end maintenance process, from asset hierarchy and job plans to workflow, escalations and a data import template. You need basic computer skills and some exposure to maintenance or stores work; no prior Maximo experience is assumed. You practise in hands-on labs every day, working in a Maximo Application Suite environment on realistic records from more than one sector.

Course Objectives:

- Map your sites, locations and assets into a Maximo hierarchy with classifications and meters
- Run work orders, job plans and PM records through their full lifecycle on your own maintenance tasks
- Run storeroom, reorder and purchasing transactions from requisition to invoice for your spare parts
- Score maintenance performance with KPIs, result sets and BIRT reports built for your supervisors
- Build security groups, Database Configuration changes and Application Designer screens for your user roles
- Test workflow, escalations, automation scripts and data imports on a process you configure end to end

Target Audience:

- You plan and schedule maintenance work and build the job plans and PM schedules behind it
- You carry out or supervise maintenance tasks and record work, failures and readings in the system
- You run storerooms, issue parts, or raise requisitions and purchase orders for maintenance
- You look after asset data and reliability, analysing failure history and condition readings
- You administer Maximo, managing users, security, configuration and data loads

Course Outline:

Day 1: Navigating Maximo Application Suite and Its Core Structure

- Navigating the Maximo Manage Interface, Menus and Start Centres
- Comparing Maximo Asset Management 7.6 With Maximo Application Suite
- Mapping Organisations, Sites and Sets in the Data Model
- Searching Records With List Tabs, Filters and Saved Queries
- Build: Personal Start Centre With Saved Queries and Bookmarks



Day 2: Building Location and Asset Hierarchies

- Structuring Location Systems and Parent-Child Hierarchies in Locations App
- Creating Asset Records With Specifications, Spare Parts and Moves
- Applying Classifications and Attributes to Assets and Locations
- Configuring Meters, Meter Groups and Condition Readings for Assets
- Build: Asset and Location Hierarchy for a Pilot Plant Area

Day 3: Running the Work Order Lifecycle

- Creating Work Orders and Tracking Statuses From WAPPR to CLOSE
- Planning Labour, Materials, Services and Tools on Work Orders
- Reporting Actuals, Downtime and Failure Remarks in Work Order Tracking
- Raising Service Requests and Converting Them Into Work Orders
- Build: Corrective Work Order Taken From Request to Closure

Day 4: Standardising Work With Job Plans, Crafts and Crews

- Writing Job Plans With Tasks, Labour and Material Lines
- Defining Crafts, Skill Levels, Labour Records and Qualifications
- Organising Crews, Crew Types and Person Groups for Assignment
- Linking Hazards and Precautions to Job Plan Tasks
- Build: Job Plan Library for Three Recurring Maintenance Tasks

Day 5: Setting Up Preventive Maintenance, Routes and Condition Monitoring

- Configuring PM Records With Time and Meter-Based Frequencies
- Generating PM Work Orders and Reviewing the PM Forecast
- Building Routes and Route Stops for Inspection Rounds
- Setting Condition Monitoring Points With Upper and Lower Limits
- Build: PM Schedule With Forecast for a Critical Asset Group

Day 6: Managing Storerooms, Items and Reorder

- Creating Item Master Records, Commodity Groups and Item Sets
- Setting Storeroom Balances, Bins, Issues and Transfers in Inventory
- Calculating Reorder Points, Economic Order Quantity and Lead Times
- Running Physical Counts, Adjustments and Inventory Usage Records
- Build: Stocked Spare Parts List With Reorder Settings



Day 7: Processing Purchasing, Vendors and Contracts

- Raising Purchase Requisitions From Work Orders and Reorder Runs
- Converting Requisitions Into Purchase Orders With Approval Limits
- Recording Receipts, Returns and Invoice Matching Against Purchase Orders
- Managing Companies, Vendor Records and Purchase Contracts
- Build: Purchasing Trail for One Contracted Spare Part Order

Day 8: Planning and Scheduling Work in a Guided Case Study

- Tracing a Breakdown Case From Service Request to Purchase Order
- Prioritising Backlog With Work Order Priority and Asset Criticality
- Assigning Work in Graphical Scheduling Using Gantt Views
- Balancing Labour Capacity Against the Weekly Schedule Window
- Build: Weekly Maintenance Schedule for the Case Study Site

Day 9: Controlling Safety and Capturing Reliability Data

- Creating Safety Plans With Hazards, Precautions and Hazardous Materials
- Applying Lock Out Tag Out Operations and Work Permit Concepts
- Building Failure Code Hierarchies of Problem, Cause and Remedy
- Analysing Failure History and Mean Time Between Failures Data
- Build: Safety Plan and Failure Class for One Asset Type

Day 10: Measuring Performance and Reporting From Maximo

- Defining Maintenance KPIs in the KPI Manager Application
- Configuring Start Centre Result Sets, Charts and KPI Portlets
- Running and Scheduling BIRT Reports With Report Administration
- Checking Data Quality With Queries for Missing and Duplicate Records
- Build: Maintenance Performance Start Centre for a Supervisor

Day 11: Administering Users, Security Groups and Access

- Creating Users, Person Records and Login Settings
- Designing Security Groups With Application and Site Authorisations
- Restricting Data With Conditional Expressions and Data Restrictions
- Testing Access With Role-Based Test Users and Audit Trails
- Build: Security Group Matrix for Planners, Technicians and Storeroom Staff



Day 12: Extending the Data Model and Application Screens

- Adding Attributes and Objects in Database Configuration
- Creating ALN, Synonym, Numeric and Table Domains
- Modifying Application Screens and Fields in Application Designer
- Cloning Applications and Managing Signature Options
- Build: Extended Asset Application With New Field and Domain

Day 13: Automating Processes With Workflow, Escalations and Scripts

- Designing Approval Processes in Workflow Designer With Nodes and Roles
- Configuring Escalations, Actions and Communication Templates for Overdue Work
- Writing Introductory Automation Scripts With Object Launch Points
- Debugging Workflow Assignments and Escalation Logs
- Build: Work Order Approval Workflow With Overdue Escalation

Day 14: Integrating Data and Planning Upgrades

- Mapping Object Structures, Enterprise Services and Publish Channels in MIF
- Loading Data With Application Import, Export and Data Loading Templates
- Reviewing Maximo Monitor, Health and Predict Within the Suite
- Planning Migration From Maximo 7.6 With Migration Manager Packages
- Build: Data Import Template and Migration Checklist

Day 15: Configuring an End-to-End Maintenance Process in a Lab

- Setting Up Asset, Job Plan and PM Records for Capstone Site
- Running Work, Inventory and Purchasing Transactions End to End
- Applying Security, Workflow and Escalation Settings to the Process
- Presenting the Configured Process and Testing It With Peers
- Build: Configured End-to-End Maintenance Process With Handover Notes

Skills You Will Gain:

- Asset Hierarchy Design
- Preventive Maintenance Scheduling
- Inventory Reorder Configuration
- Failure Code Analysis
- Graphical Scheduling
- Security Group Administration
- Workflow and Escalation Design
- Maximo Integration Framework Data Loading



Why Attend This Course:

- Set up a personal start centre in the first days and use it to find your own work orders the week after
- Build a job plan library and PM schedule that you can load against your own assets
- Configure security groups, workflow and escalations that you can apply on your test environment straight away
- Take back a configured end-to-end maintenance process with handover notes to reuse as your own configuration reference

Conclusion:

In your first week back, open the configured end-to-end maintenance process and compare it with how work actually flows on your own site, noting the gaps in hierarchy, job plans and approvals. Show the handover notes and security group matrix to your maintenance supervisor and system owner, and agree which changes go to your test environment first. After the first work orders run through the new set-up, check status history, escalation logs and data quality queries to confirm records close correctly and that nobody is blocked by missing access.

Frequently Asked Questions FAQ:

What will you be able to do after this IBM Maximo training course?

You will be able to run work orders, preventive maintenance, inventory and purchasing in Maximo Manage, then configure security groups, database fields, screens, workflow and escalations, and load data, so you can both use and administer the system on your own site.

What do you need to know before starting the IBM Maximo training course?

You need basic computer skills and a working understanding of maintenance or stores activities. No previous Maximo experience is required, because the first week starts with navigation and core records before moving to functional and administration work.

What do you build during the IBM Maximo training course?

You build a configured end-to-end maintenance process: an asset hierarchy, job plans, PM schedules, a spare parts list, a security group matrix, a work order approval workflow with escalation and a data import template, finished with handover notes.

How does this IBM Maximo training course differ from shorter Maximo courses?

Shorter Maximo courses usually cover one area, such as work management or security, over a few days. This course follows one progression across three weeks, from end-user tasks to functional processes and then administration and integration, with a hands-on build each day.

