# PEOPLESOFT MAINTENANCE MANAGEMENT

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**KEY BENEFITS**

• Streamline Maintenance Operations

• Manage Full Asset Lifecycle

• Lower Total Cost of Ownership

*Oracle's PeopleSoft Maintenance Management completes the Enterprise Asset Management (EAM) solution. EAM provides the ability to control costs and improve visibility across the asset lifecycle. From capital planning and budgeting, through project management and operations, to maintenance and retirement, EAM provides the tools necessary to control and fully exploit your asset infrastructure.*

At the center of the EAM solution, PeopleSoft Maintenance Management enables organizations to streamline operations, facilitate compliance, and eliminate costly, inadequate custom integrations to third-party systems.

When organizations combine PeopleSoft Maintenance Management with other applications, such as PeopleSoft Project Costing, Asset Management, Purchasing, and Inventory, they gain a solution that enables them to prioritize assets and ensure they are administering the right level of investment to meet utilization and financial goals. PeopleSoft Maintenance Management also supports the PeopleSoft Real Estate Management and IT Asset Management applications with self-service requests for facilities and IT service work.

## Solution Highlights

• WORK MANAGEMENT - Develop efficient, cost-effective processes and templates for maintaining physical assets and maximizing asset performance.

• RESOURCE ASSIGNMENTS - Assign equipment and human resources to work orders, matching work order requirements to availability, skills and locations. Optimize utilization and effectively manage workloads.

• CREW SCHEDULING - Define target workloads as a percent of crew capacity and assign work to crews at both the craft and individual technician level and track actual versus scheduled work to analyze schedule compliance and drive improvements in workforce utilization, minimize overtime, and raise equipment uptime.

• PREVENTIVE MAINTENANCE – Identify and establish recurring maintenance schedules, automatically generate forecasts of work before work orders even appear in the system, and generate work orders automatically to save time and administration.

• CONDITION-BASED MAINTENANCE ALERT MANAGEMENT – Establish rules to enable the maintenance organization to receive "out of tolerance" alerts, take immediate action either by creating a work order, triggering a preventive maintenance work order, or closing the alert, reducing the over-servicing of assets and improving the identification of asset issues before they become problems or failures.

• SUPPLY CHAIN MANAGEMENT - Recognize material need based on

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current and future availability, select vendors, reserve inventory, automatically replenish stock, and view storage area stock levels across the enterprise to minimize inventory balances and unnecessary spending.

- WORK ORDER COMPLETION - Expedite the entry of labor time, inventory usage and returns, and tool usage for the tasks associated with a selected work order.

- CAPITAL PROJECT SUPPORT – Plan and schedule technicians, materials, contracted services, and tools and streamline capital project accounting processes.

- WARRANTY RECOVERY - Automatically load warranty claims with the parts that caused a failure; identify the downtime and repair cost, and track progress in collecting funds from the manufacturer or supplier.

- FAILURE ANALYSIS SUPPORT - Capture and understand the reasons why failures occur. Identify the remedy for those failures, template solutions to speed time to repair and raise quality, determine the impact of different failures, and make informed decisions about which assets require preventive maintenance measures.

- EQUIPMENT MAINTENANCE COST ANALYSIS - View summarized and detailed cost breakouts for equipment and components, and view equipment costs grouped by defined criteria, such as meter type, asset, asset component, maintenance type, and work order.

- INTEGRATION WITH THIRD-PARTY GEOGRAPHIC INFORMATION SYSTEMS (GIS) - View the location of an asset in Asset Management or a work order in Maintenance Management on a map. The asset displays a list of asset characteristics and enables the creation of a Maintenance Management work order for that asset. The work order displays additional details about the work order.

## Streamline Maintenance Operations

Streamline maintenance operations with configurable work orders capable of supporting a variety of approaches to planning and scheduling of maintenance. The express work order is for technicians and equipment operators to rapidly identify problems. The full-feature work order addresses the needs of maintenance planners and schedulers, although it can also be used for shops that allow technicians to do "self-assignment" of work. Work order templates are used to rapidly create work orders, auto-generate Preventive Maintenance work orders, and auto-populate accounting codes. PeopleSoft Maintenance Management also provides the ability to generate a work order from an IT Help Desk case and have the work order update the case as the work proceeds.

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**Figure 1 The Express Work Order is used by technicians and equipment operators to rapidly identify problems.**

**Key work order features include:**

- Two versions of the work order: Express & full-feature

- Flexible work order statuses, data fields, security, and behavioral rules

- Multi-task work orders

- Component change-out functionality

- Configurable work order types

- Ability to generate work orders from IT Help Desk cases

- Work order accounting defaults based on templates

- Ability to track work order durations by fractions of an hour

- Work Order templates for rapid creation of new work orders

- Configurable workflow approval

- Warranty claim generation

- Proactive user alerts of existing hazards, safety checklists, and warranties

- Work order security by shop and project to limit access to work orders

- Work order data export and import to and from Microsoft Project

- Ability to search for components within an asset hierarchy

- Ability to update equipment parts lists from work orders

- Web services integration with mobile devices to enter and retrieve work order data, allowing real time accuracy in reporting

For departments that identify resource requirements for maintenance work and schedule the resources, the Work Order Schedules page provide for scheduling labor, inventoried items, non-inventoried items, and tools.  Users can search the pool of technicians inside and outside of a given shop and receive a recommendation based on qualifications and availability.  PeopleSoft Maintenance Management even helps you search for tools by determining what is available and allowing you to assign the tools to work orders.  Planners and schedulers can select inventory and

non-inventory items from multiple maintenance Equipment Parts Lists, which identify appropriate materials for the repair and maintenance of specific components. For inventoried items, PeopleSoft Maintenance Management examines the supply chain to determine the earliest date items are available, enables inventory reservation and access to the Shortage Workbench for reservation adjustments, and places demand on inventory to affect balances and trigger replenishment. Users can also run a material readiness analysis, which saves technician time by highlighting supply delays and problems in advance and identifying which work orders are ready to release.

PeopleSoft Maintenance Management's Preventive Maintenance (PM) engine not only streamlines administration for routine maintenance work, but also offers work projections based on schedule patterns, meter reading forecasts based on samples of past readings, or both. The application provides the ability to download projections and actual work orders to Microsoft Project to facilitate workload planning and balancing.

**Key features of the PM scheduling feature are:**
- Attach PM schedules to assets, locations, or asset collections

- Assign maintenance types based on asset classification to improve PM reporting and analysis

- Generate work orders automatically according to templates and user-definable default values

- Generate a work order automatically upon entry of an out-of-tolerance meter reading

- Support blackout periods and blackout days of the week

- Drive the creation of work orders by either time, meter readings, or a combination of both

- Generate PM work orders within a user-defined percentage of being due

- Let users control scheduling options (e.g., allow multiple or only one open PM work order at a time, only generate a work order one time, generate a PM work order with a future due date, etc.)

- Require a meter reading at work order completion

- Linking of major and minor preventative maintenance schedules to enable generation of work orders for both at the same time

- Ability to mass update multiple PM schedules by business unit

To prevent unnecessary repairs and maintenance, PeopleSoft Maintenance Management proactively notifies users with visual indicators, when there are warranties in effect for an asset. To cope with the administrative overhead of submitting warranty claims, PeopleSoft Maintenance Management enables maintenance managers to check a box on each Work Order task indicating that the work and costs should be recovered from a third-party.

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**Key Warranty features include:**

- Standard warranties to streamline association of warranty terms to asset/equipment records

- Ability to automatically copy work order maintenance data into a warranty claim to streamline the process of recovering costs

- Warranty claim management facility to track recovery of costs from manufacturers/suppliers

## Manage Full Asset Lifecycle

PeopleSoft Maintenance Management provides role-specific workbenches and interactive work order tracking to organize and prioritize asset maintenance work rapidly. The Work Order Workbench, Crew Scheduling Workbench, Labor Assignment Workbench, and PM Schedule Workbench for planners and schedulers and the Technician's Workbench allow users to select and prioritize work for their specific needs. The workbenches assemble key information about the task, schedule, resources, instructions, and assets while making detailed information accessible via drill down.

- Work Order Workbench:

  - Personalize work order views to filter which and how work orders display

  - Rapidly review and evaluate work progress

  - Prioritize work orders

  - Access resource assignment information

  - Modify work dates

  - Monitor work progress

- Crew Scheduling Workbench

  - Save commonly used views to automatically filter crews and work orders

  - Review crew capacity, target load, scheduled workload, and variances by craft

  - Rapidly assign and reassign work orders to crews.

  - Immediately view impact of assignments on capacity

- Labor Assignment Workbench

  - Specify criteria to identify resources and crews to schedule

  - Review technician availability by day

  - Assign specific technicians to work order tasks

- Preventive Maintenance Schedule Workbench:

  - Access PM Schedule

  - View asset data

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- View related PM Loop information

- View work order default data

- Identify key PM Schedule attributes

- Technician Workbench:

  - Rapidly identify and prioritize work

  - Access work instructions, checklists, and documents

  - Generate pick lists

  - Record time, materials, and tool usage

  - Record meter readings

  - Record parts responsible for causing failures

  - Capture the information necessary for failure tracking and analysis

  - Chart meter readings to predict failures

  - Enter and track personal time, such as vacation, sick time, and jury duty

## Lower Total Cost of Ownership

One of the most important benefits of PeopleSoft Maintenance Management is its extensive, "out-of-the-box" integration to PeopleSoft Supply Chain Management, Financial Management, Human Capital, Project Management, Help Desk, Real Estate Management, and IT Asset Management applications. With integration delivered as part and parcel of the PeopleSoft EAM solution, organizations can focus on the business of constructing, operating, and maintaining assets, not software. Eliminating costly integrations to third-party systems lowers total cost of ownership, improves the quality and integrity of data and reporting, and enables focus on the business issues of streamlining and optimizing the supply chain, improving workforce and asset utilization, lowering the cost of accounting, and raising the ROI on projects. With PeopleSoft Maintenance Management, organizations can direct limited budget to real business value drivers, not on maintaining system integrations.

## Oracle's PeopleSoft Financial Management Solutions

Oracle's PeopleSoft Maintenance Management is part of an integrated family of financial accounting and analytic applications. These solutions provide flexible, best practice business processes and greater insight into performance – helping organizations worldwide to transform finance into a strategic advantage.

## Contact Us

For more information about PeopleSoft Maintenance Management, please visit oracle.com or call +1.800.ORACLE1 to speak to an Oracle representative.

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Oracle is committed to developing practices and products that help protect the environment

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