PEOPLESOFIT ASSET
MANAGEMENT

Oracle’s PeopleSoft IT Asset Management streamlines and automates the physical, financial and contractual management of technology assets. Whether your company is a corporation, private business, government entity or educational institution, PeopleSoft IT Asset Management offers a comprehensive solution for reducing hardware and software costs, controlling service expenses and automating software and regulatory compliance.

PeopleSoft IT Asset Management helps you:

- Control IT costs for licenses, hardware and service
- Project and manage the financial impact of reconciling assets
- Ensure compliance with Sarbanes Oxley, Business Software Alliance, HIPAA, and other regulations
- Together with PeopleSoft CRM IT Help Desk, align IT help desk and software service resources with industry best practices

PeopleSoft IT Asset Management is a fully integrated solution for the management of distributed IT assets including software, servers, laptops, desktops, and PDAs. PeopleSoft IT Asset Management integrates with PeopleSoft Financial Management, PeopleSoft CRM IT Help Desk and third-party discovery tools to automatically reconcile physical and financial IT inventory and report the associated financial impact, redeploy underutilized software, and help organizations meet growing compliance requirements. PeopleSoft IT Asset Management also leverages PeopleSoft Human Capital Management for employee and organizational information, so you can ensure the employee data associated with an asset is the same data that resides in your human resources system.

Solution Highlights

- AUTODISCOVERY through integration with third-party discovery vendors enables the IT and finance organizations to efficiently gather inventory and monitor compliance with usage statistics on licenses and hardware including desktops, laptops, PDAs, and servers. Auto-discovery is available for both financial and non-financial assets.
- ASSET RECONCILIATION uses configurable business rules to enable organizations to compare what has been discovered against what is recorded in PeopleSoft Asset Management— the central Asset Repository for the PeopleSoft Asset Lifecycle Suite. The Asset Repository stores complete business data, acquisition history, maintenance history and financial data for all organizational assets. Asset Reconciliation provides easy to interpret displays of exceptions between discovery and the Asset Repository so the appropriate corrective action can be initiated. Asset Reconciliation can be enabled so that when particular exception types are found, triggers can be fired to automatically correct the exception. Individual exceptions for Assets Not Reporting and Manage Exceptions can be ignored to allow users to focus on those exceptions with the highest priority.
- AUDITING of software authorization history, and the machines or groups the software
is assigned to, supports your organization's compliance with licensing.

- FINANCIAL IMPACT projects the financial results from retiring assets that are found on the physical network, but need to be retired. A complete picture of the aggregate Cost, Fair Market Value and Net Book Value is integrated into high-level analytics. In addition, financial asset lists can be created for tracking assets or groups of assets with high financial interest.

- HELP DESK leverages the PeopleSoft CRM IT Help Desk to streamline service costs for employees and contingent labor with access to up-to-the-minute details on hardware and software configuration, work orders and costs.

- ASSET MAINTENANCE leverages PeopleSoft Maintenance Management work order functionality to streamline the request for work and the execution of maintenance tasks while systematically accounting for all associated costs.

- ANALYTICS help control IT costs through providing role-based dashboards for license utilization, hardware statistics, lease statistics and license costs. The ability to drill into the associated detail and chart trending to analyze exceptions over time is also provided.

Streamline the IT Asset Lifecycle

PeopleSoft IT Asset Management enables you to implement the best practice of perpetual auto-discovery, which inventories IT assets including software, servers, client devices, and mobile devices that connect to your network. PeopleSoft IT Asset Management is pre-configured to integrate with third-party asset discovery products as part of the solution. Finance organizations now have the added assurance of accurate data based upon routine perpetual inventories, and IT organizations can focus on IT operations instead of duplicating accounting processes to record IT assets.

Leveraging the information gathered in the discovery process, PeopleSoft IT Asset Management provides immediate access to key IT asset metrics including command center dashboard for key statistics on software usage, contract and lease expiration alerts, assets that unexpectedly stopped reporting to inventory as well as integrated financial projections of the financial impact associated with reconciling assets.

![Figure 1. IT Asset Management Key Metrics](image)

Concise Metrics Provide One-Stop Overview

PeopleSoft IT Asset Management pagelets afford IT and Finance managers easy access to key data needed to most efficiently and effectively manage hardware and software assets, requests, and work tasks including:

- Inventory Exceptions: Displays a high level view of the differences between discovered IT asset inventory versus what is recorded on the books. For assets that are found on the network but are not in the Asset Repository, a financial projection is
provided for the Cost, Fair Market Value and Net Book Value associated with reconciling those assets.

- **Manage Exception Trend Chart**: Displays the exceptions from Inventory Exceptions over time to provide a quick snapshot of the number of current exceptions. Customers can analyze business events that may be contributing to the number of exceptions, and work towards reducing these exceptions over time.

- **Software Inventory Monitor**: Provides the count of total licenses in inventory vs. licenses installed in the physical environment, along with the counts for authorized and unauthorized users.

- **Software Device Monitor**: Shows aggregates of software tracked by device in a hierarchical structure, allowing visibility for expensive software used on shared devices (e.g., servers) to be tracked in groups. Each group can in turn belong to a higher-level group, showing aggregate use of software to the highest level of the enterprise.

- **Hardware Inventory**: Counts all IT hardware by subtype that appears in the auto-discovery results and the Asset Repository, along with a summary of differences between discovered IT hardware and the Asset Repository.

- **Assets Not Reporting**: Displays a list of assets that unexpectedly stopped reporting via auto-discovery within specified time periods. A financial projection is provided for the Cost, Fair Market Value and Net Book Value impact for reconciling assets.

- **Asset Financial Statistics**: Displays a snapshot of IT financial statistics, including cost and depreciation on IT hardware and software.

- **Software Progress Report**: Displays a report on progress-to-date for specific software-related projects.

- **Hardware Progress Report**: Displays a report on progress-to-date for specific hardware-related projects.

- **Software Pending Requisitions**: Displays a running scorecard on software licenses for which installations exceed licenses in inventory.

- **Software Renewal Pagelet**: Displays a list of software license renewals along with the associated expiration dates.

- **Lease End Metric**: Displays a list of pending lease renewals with the expiration date, along with drilldown capability into the associated leased assets.

**Reconciliation and Intelligent Actions**

Another key feature of the PeopleSoft IT Asset Management solution is the ability to compare what has been discovered against the financial records and highlight those exceptions. The appropriate intelligent actions can be automated or initiated for individual assets or the entire enterprise to resolve those differences.
Figure 2. Intelligent Actions resolve asset discrepancies

The asset reconciliation engine compares discovered asset inventory to that stored in the Asset Repository. PeopleSoft IT Asset Management serves to complement your existing business policies and procedures, rather than replace or duplicate them. Key features of the asset reconciliation process are the following:

- Configurable business rules enable users to define data points and remedial intelligent action recommendations for reconciling discovered IT assets with IT assets recorded in the Asset Repository including automatically executing the intelligent actions to correct the exception.
- The Inventory Exceptions pagelet displays a list of active Business Rules and a count of assets in exception to each rule. Business Rules that don’t have exceptions don’t appear in the pagelet. Users may drill down to Manage Exceptions, a detailed, highly configurable view of any displayed count.
- From Manage Exceptions users may select specific assets or asset groups then choose from pre-defined Business Rule actions to clear associated exceptions, thereby reconciling discovered inventory with the Asset Repository.
- Workflow, automated comparisons and pagelets are used to monitor progress in clearing exceptions.
- Non-reporting assets are tracked and audited according to user-defined rules.
- Exceptions can be ignored to bring higher priority exceptions into focus, for example to retire those assets not on the books prior to reconciling the model name for an asset.

Financial Forecasting

IT Asset Management provides summary financial information for asset retirements that may have a material impact to enterprise financial reporting. Financial impact can be viewed at the enterprise level as well as user defined asset groups, providing ultimate flexibility.

- Financial Impact analysis provides the projected Cost, Fair Market Value, and Net Book Value for assets that are no longer found on the physical network and that are candidates for retirement.
- Financial Asset Lists can be created for tracking assets or groups of assets of particular interest. Complete lists of assets can be worked as a single asset.

Service to Resolution Help Desk Support

A significant portion of the ongoing cost of supporting IT assets includes servicing those
assets. The PeopleSoft CRM IT Help Desk provides case management and solution delivery tools specific to resolve IT problems and requests. PeopleSoft Maintenance Management provides integrated maintenance tracking to capture IT asset maintenance costs. Combined with PeopleSoft IT Asset Management, the solution provides a complete service-to-resolution process for IT assets. Key features include:

- IT asset data for IT Help Desk sourced from the Asset Repository
- On demand access to the Asset Repository
- Ability to apply install, move, add & change transactions to the Asset Repository to track organizational changes
- Ability to create a work order from an IT Help Desk case to capture material and labor costs associated with IT asset maintenance

Ensure IT and Corporate Compliance

Organizations are required to address a mounting set of IT and corporate compliance requirements including Sarbanes Oxley and the Business Software Alliance. Managing software compliance across thousands of distributed servers, laptops and desktops is further complicated by the accessibility of non-standard software. Using PeopleSoft IT Asset Management’s Software Inventory Monitor, organizations have visibility into key information including the number of software licenses installed vs. licenses in inventory, and authorized and unauthorized installations. Software metrics provide an IT Manager with the ability to monitor and control specified software licenses within the enterprise. Because licenses can be tracked as capital or non-capital assets, compliance can be ensured regardless of the capitalization threshold established by Finance. With PeopleSoft IT Asset Management, organizations can:

- Provide visibility into deployed software licenses and authorized vs. unauthorized installations
- Manage software compliance at the level appropriate to the corresponding license using flexible authorization levels
- Authorize software installations at the user – individual or group -- level for maximum control over the distribution of software across the enterprise
- Authorize software installation at the device – individual or group -- level for maximum control of shared machines across the enterprise
- Collect statistics to manage under-utilized hardware & software
- Store usage data in the Asset Repository to easily assess ownership and cost
- Collect and view the history of software authorizations to provide an audit trail.

Enterprise-Wide Integration

PeopleSoft IT Asset Management is a fully integrated solution that shares information seamlessly across the enterprise with PeopleSoft Financial Management (for accounting functions), PeopleSoft Human Resources (for employee information), and PeopleSoft Supply Chain Management (for procurement) to perform the key IT asset management business processes of planning, requisition, acquisition, discovery (via third party integration) and reconciliation of IT assets. Additionally, the PeopleSoft IT Asset Management solution integrates with PeopleSoft CRM IT Help Desk and PeopleSoft Maintenance Management to service and maintain IT assets. This integration enables the fusion of technical and financial asset management policies into a single centralized application, ensuring data consistency and operational efficiency.
For more information about PeopleSoft IT Asset Management, visit oracle.com/partners or call +1.800.Oracle1 to speak to an Oracle representative.