Explore the Latest Developments in SAP Enterprise Asset Management

HaJo Lockermann
SAP Labs
Agenda

1. Enhancement Package concept
2. Recap of what was new in EAM Enhancement Package 2
3. What’s new for EAM in Enhancement Package 3
4. What’s new for EAM in Enhancement Package 4
5. Preview of planned topics in Enhancement Package 5
6. Wrap-up
SAP ERP Enhancement Packages: Innovation without Disruption

Business drivers
- Customers want **evolutionary** path rather than large upgrades
- Partners require a stable **platform** on which to offer their applications
- SAP needs more **flexibility** to deliver innovation faster to its installed base

SAP ERP Release Strategy

- **2006**
- **2008**
- **2010**
- **2012+**

Enhancement Packages

- **SAP ERP 6.0**
- **SAP NetWeaver**

Technology enablers
- **Service-Oriented Architecture (SOA)** allows for decoupling of composite and core processes
- **Switch framework** provides flexibility to choose what functionality to activate
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Enterprise Asset Management (EAM) SAP ERP
6.0 Enhancement Package 2

SIMPLIFICATION

Portal roles for EAM
- Maintenance Planner
- Maintenance Supervisor
- Maintenance Technician (enhanced)

PM Order — Simplification of Screen Layout (enhanced)

Basic Maintenance Processing (role)

NEW FUNCTIONALITY

Enhancements to Configuration Control - Enablement of Equipment BOM (non-serialized parts)

Compatible Units (CU) — Work order processing with work packages

Enhancements of SAP NetWeaver® BI Content for EAM

Continuous Improvements in SAP ERP
- Mass Changes for Equipment and Functional Locations
- Measurement Reading Transfer Within a Technical Object
- Assign Calendar for Scheduling of Orders
- Digital Signature for Order Operations
- Define Status Control for Shop Papers
- Transfer Relationships When Creating an Order

SERVICE-ORIENTED ARCHITECTURE (SOA)

Enterprise Service Bundles for EAM
- Maintenance Processing
- Maintenance Collaboration
- Asset Configuration

INDUSTRY RETROFITS

Maintenance Event Builder (MEB)
Hierarchical Task Lists (HTL)
Technical Object Logbook
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Enterprise Asset Management (EAM) SAP ERP 6.0 Enhancement Package 3

NEW FUNCTIONALITY

Take Over/Hand Over (ToHo) of Technical Objects
Shift Notes/Shift Book
Integration of PM with Environmental Compliance
Continuous Improvements in SAP ERP
  - Enhanced Search Capabilities (TREX) for Notifications
  - Digital Signature in Notification
  - New and enhanced BAPIs for Technical Objects
  - New BAdIs
  - Work Clearance Management (WCM) Enhancements

INDUSTRY RETROFITS

Pool Asset Management

Enterprise Service Bundles for EAM
  - Maintenance Processing — continued
  - Maintenance Collaboration — continued
  - Asset Configuration — continued

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SAP ERP 6.0 Enhancement Package 3: What’s New?

- Take Over/Hand Over of Technical Objects
- Pool Asset Management
- Shift Report/Shift Notes
- Continuous Improvements
Physical object, together with object structure, goes from asset owner to sub-contractor — and back

Take Over/Hand Over: Process

Asset Owner

Sub-Contractor

Technical object structure (Funct. Loc, Equip., BOM, Counters)

Material 1

Material 2

Master Parts List (not transferred)
**Take Over/Hand Over: Process Steps**

### Asset Owner

1. **Create & Send XML (Handover)**
   - Object in SAP ERP

2. **Import XML & Create/Upd. Struct. (Takeover)**
   - Object in SAP ERP

   - `<PHIN_S_HANOVER>
     <EQRNR>000000000010001079</EQRNR>
     <SPRAS>E</SPRAS>
     <EKTX>Engine</EKTX>
     <EQTYP>M</EQTYP>
     <IWERK/>
     <SWERK/>
     <STORT/>
     <MSGRP/>
     <BEBER/>
     <ABCKZ/>
   </PHIN_S_HANOVER>`

3. **Save in Records Management**

### Sub-Contractor

1. **Import XML & Create/Upd. Struct. (Takeover)**
   - Object in SAP ERP

2. **Create & Send XML (Handover)**
   - Object in SAP ERP

3. **Save in Records Management**
SAP ERP 6.0 Enhancement Package 3: What’s New?

- Take Over/Hand Over of Technical Objects
- Pool Asset Management
- Shift Report/Shift Notes
- Continuous Improvements
Pool Asset Management: Process Overview

1. Creation of requirement

2. Vehicle scheduling

3. Automatic confirmation of booking

4. Vehicle issue

5. Vehicle return

6. Cost allocation

Requester creates a vehicle requirement in system

Fleet manager assigns requirement to a vehicle

Requester receives confirmation by email

Vehicle usage costs are calculated and allocated to the account assignment object. It is possible to have a resource-related billing.

Vehicle is returned. Mileage and time of return are entered.

Vehicle is issued.

Mileage and time of issue are entered.
Pool Asset Management: Web or Online Entry of Requirement

Create Service Notification:

- Notification: 00000608000001 ZF
- Status: 00000000000000

Trip Data
- Planned Start: 10/14/2008 10:00:00
- Planned End: 10/15/2008 10:00:00
- Request for Driver: [ ]

Settlement
- Settlement Order: [ ]
- Cost Center: 41900
- Customer: [ ]

Vehicle
- Vehicle Type: 02 Economy
- Passenger Number: [ ]
- Roof Rack: [ ]
- Auto. Transmission: [ ]
- Snow Chains: [ ]
- Snow Tyres: [ ]
- Air Cond.: [ ]

Remarks: Visit Customer

Fund: [ ]
Partner: UT-FLEET
Name: Joe Fleet
Address: Fleet, 60441, Frankfurt,
### Pool Asset Management: Planning Board to Book the Reservation

#### Pool Car Management: Graphical Resource Planning

<table>
<thead>
<tr>
<th>Vehicle</th>
<th>Car Pool</th>
<th>Category</th>
</tr>
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<tbody>
<tr>
<td>HD-ZZ 590</td>
<td>F001</td>
<td>Mini</td>
</tr>
<tr>
<td>HD-JA 438</td>
<td>F001</td>
<td>Medium clas</td>
</tr>
<tr>
<td>HD-RV 2381</td>
<td>F001</td>
<td>Economy</td>
</tr>
<tr>
<td>HD-GH 56</td>
<td>F001</td>
<td>Compact cla</td>
</tr>
<tr>
<td>HD-JK 125</td>
<td>F001</td>
<td>Mini van</td>
</tr>
</tbody>
</table>

**Available vehicles**

**Requirements to be planned**

Schedule by drag and drop

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SAP ERP 6.0 Enhancement Package 3: What’s New?

- Take Over/Hand Over of Technical Objects
- Pool Asset Management
- **Shift Report/Shift Notes**
- Continuous Improvements
A shift report will be created by the shift lead or the production supervisor, who will refer to the respective work center and collect all relevant information during the shift. At the end of the shift, the resulting report can be generated as a PDF document. This can be used in the handover meeting for the following shift. It can also serve as an official record for regulatory or legal purposes.
A shift note is a short note with regards to an event that cannot be recorded otherwise, e.g., as a completion confirmation or a maintenance notification. Examples include:

- An employee is late
- Notes regarding machines (examples: mounted coil, started device, …)
- Change of material
Reference object

The user can enter shift notes explicitly with reference to a concrete object.

All objects in the Business Object Repository can be assigned. The following objects can be used by default:

- Material
- Batch
- Planned order
- Completion confirmation
- Completion confirmation (process order)
- Maintenance notification and order
- Confirmation of maintenance order
- Equipment
- Technical location
- Quality notification
- Inspection lot
- Work clearance
- Work clearance item/request
- Work clearance list
- Measuring document
- Measurement point

In three simple steps, the administrator can add new business objects to this list. Thus, it is possible to add customer-specific (Z-) objects.
SAP ERP 6.0 Enhancement Package 3: What’s New?

- Take Over/Hand Over of Technical Objects
- Pool Asset Management
- Shift Report/Shift Notes
- Continuous Improvements
SAP ERP 6.0 Enhancement Package 3: Continuous Improvements

- (Details on conference CD)
  - Enhanced Search for Notifications
  - Digital Signature Process in Notifications
  - Other
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What's New for EAM in Enhancement Package 4?

- Rotables Management (Internal, Sub-Contracting and Warranty Claims)
- Integrated Service Procurement
- Inspection/Operator Rounds
- Continuous Improvements
Rotable Management

Technical Object

Stock
Serviceable
Unserviceable

In-house Repair

Subcontracting
Enhancements to Rotables Processing — Internal Refurbishment

- Integration of Refurbishment Order to Notification
  - Assignment of one or more notifications to a refurbishment order

- Support Material upgrade/exchange process
  - Support of the material upgrade and exchange process by means of a material number change from within the goods receipt for the refurbishment order, including possibility to create a new material from within the goods receipt, as well as a check of the new material via the serial number profile

- Inventory postings from/to Special Stock
  - Support of additional special stock types for refurbishment orders: Sales order stock (special stock indicator E) Project stock (special stock indicator Q)

- Stock determination for PM/CS including Refurbishment orders
  - Stock determination in PM/CS orders enables you to implement various strategies to withdraw material for goods issues and stock transfers in PM/CS orders. You configure these strategies in Customizing. Based on the material requirements entered, the SAP system determines from which storage locations and stock the material should be withdrawn.
Enhancements to Rotables Processing — Internal Refurbishment (cont.)

- **Improved integration with MRP**
  - Plan specific refurbishment of repairs by creating planned orders in Material Requirements Planning (MRP). When required, you convert these planned orders into refurbishment orders (PM) to start the refurbishment process. The planned order provides the quantity and dates for the refurbishment order.

- **Work in Progress (WIP) visibility**
  - Visibility of Work in Progress by means of a field showing the quantity of rotable parts still undergoing the refurbishment process. This is supported by movement types 313 and 315 for two-step stock transfer.
Enhanced Topics for Refurbishment Orders

- Partner Function to ensure third-party maintenance
- Stock determination process for order
- Additional movement type for two-step transfer
- Linking MRP run with refurbishment orders
- Relation between Notifications and order
- Material Upgrade process
- Additional Fields to get better visibility
Refurbishment of Spare Parts by Subcontractor

Damaged parts or parts that have reached hard-life limits are normally kept in a separate stock called *unserviceable stock*. Enhanced solution to manage such repair/refurbishment has the following advantages:

- Integrates processes between Maintenance and Supplies Department
- Provides better visibility for the parts that are under repair
- Provides ability to manage serialized/nonserialized parts
- Provides ability to manage different types of stocks across supply chain, for example, project stock, vendor stock, etc.

Process overview for parts sent to subcontractor for repair/refurbishment:

1. View MRP result
2. Create PR for subcontract
3. Convert PR to PO
4. Subcontracting monitor to track delivery and stocks
5. Receive Returned parts
Warranty Claim Creation from the Notification/Order

Warranty claim can be created from the order/notification.

Claim header receives:
- Business partner
- Technical object (equipment/functional location)

Document flow includes warranty claim

Claim reference is copied from notification to order
What’s New for EAM in Enhancement Package 4?

- Rotables Management (Internal, Sub-Contracting and Warranty Claims)
- Integrated Service Procurement
- Inspection/Operator Rounds
- Continuous Improvements
Service Procurement: Summary

Enable Sourcing for MM-SRV customers
- Enhancing MM-SRV process with Sourcing Capabilities in SAP SRM
  - Enable transfer of Purchase Requisition with hierarchical structure to SAP SRM
  - Sourcing rules, RFx, Back-end Contract
- Enable processing of RFQs
  - Enhance expressive bidding

Enhance SAP SRM for Services Procurement
- Enhance hierarchical structure, including inheritance and roll-up mechanisms to facilitate creation of business objects
- Maintain Model Service Specifications in SAP SRM- MDM Catalog

Collaborative End-to-End process
- Improve Supplier collaboration for services and materials
- Enable SUS for hierarchical structures
- Enhance SUS/MM-SRV connection for Services
- Tracking of changes
- Self-Service for Service Entry

SAP ERP
- Purchase Request
- Contract
- Purchase Order

SAP SRM
- Sourcing Cockpit
- RFx

Buying Company

Supplier Company
- Sales Order
- Confirmation
- Invoice
- Service Entry Sheet

SUS/MM-SRV connection for Services
- Tracking of changes
- Self-Service for Service Entry
Supplier Self-Service Scenario

Key features
- Vendor self-service entry
- Time and expense entry
- Support of complex services
- Vendor evaluation

Options
- SAP SRM Sourcing/Bidding
- SAP SRM-MDM Catalogs
- Contract or PO creation in SAP ERP
Integrated service procurement

Integrated service procurement is targeting maintenance services (planned and unplanned) with focus on collaborative end-to-end process.

Key features

- Generic procurement process in SAP ERP fully integrated with SAP SRM sourcing functionalities
- Support for complex nature of definition of services
- Advanced sourcing functionalities for services utilizing RFx functions in SAP SRM
- Catalog as repository for service specifications
- Supplier collaboration, including service entry by supplier
- Transparency and integration across the process life cycle
What’s New in SAP SRM 7.0: Service Procurement

Transfer external services item including hierarchical structures to SAP SRM

- MM-SRV supports handling of purchasing documents with hierarchical structure of outlines and service lines. You can now also transfer requisitions with hierarchical structures to SAP SRM to use sourcing functionality such as demand aggregation and RFx handling. All subsequent process steps support complex service structures.

(See appendix material on conference CD for details)

SAP ERP MM-SRV service item with hierarchical structure

- Service specification outlines

- Service line

MM-SRV service item with hierarchical structure in sourcing cockpit
Purchaser Portal Role

- A new portal role for purchases combines SAP ERP and SAP SRM data for a unified view
- SAP ERP Purchase requisitions as well as SAP SRM shopping carts can be processed
Complex Services in SAP SRM

- When processing the shopping cart, all the details from SAP ERP are visible
- New with SAP SRM 7.0/SAP ERP 6.0 EhP 4: Complex services (hierarchies) are fully integrated
What’s New for EAM in Enhancement Package 4?

- Rotables Management (Internal, Sub-Contracting and Warranty Claims)
- Integrated Service Procurement
- **Inspection/Operator Rounds**
- Continuous Improvements
Inspection lists contain a set of smaller simpler tasks. Examples:

- Take measurement readings
- Make visual inspections
- Perform lubrication tasks
- Switching actions

The tasks in an inspection list:

- Are sorted, so that the workers can perform the tasks in a predefined or optimal sequence
- Are linked to a technical object (functional location, equipment) and optionally to an assembly
- Point to the measuring points, documents, the lubricants, and other tools, such as test equipment, that are used for this task
- Are performed on a periodic basis (daily, weekly) or on an event basis (before/after a change of the plant or production mode)
- Have to be available on mobile devices, as well as the reporting and confirmation of the tasks
Inspection/Operator Rounds Requirements: Solution Basic Concept

Inspection rounds are modeled based on PM work orders

Planning is done based on task lists and maintenance plans

Advantages of this approach:

- Use of existing reporting and SAP NetWeaver BI infrastructure
- Use of existing functions and infrastructure for mobile applications (MAM)
- Use of classic work order cycle
  - Supports all phases of work order cycle, such as planning, scheduling, execution and confirmation — out of the box
  - Benefits from Integration to materials management, controlling, etc.
Traditional Functions

Production resources/tools are:
- Material (not tracked in inventory, e.g., lubricants)
- Equipments (e.g., measuring instrument)
- Documents (e.g., test procedure)
- Other resources (e.g., crane)
- Description/Free text (e.g., instructions)
**Enhancement: New Fields for Operations**

New fields for operations: Functional location and equipment

<table>
<thead>
<tr>
<th>Header (Task list/work order)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operation 10</td>
</tr>
<tr>
<td>Operation 20</td>
</tr>
</tbody>
</table>

Remark: In work orders, it is already possible to assign functional locations and equipments to operations. This assignment can be done with the object list.
Enhancement: New Production Resources/Tools (PRT) Type — Measuring Point

New Production Resources/Tools (PRT) type: Measuring point

Remark: The measuring point assigned as PRT has to be defined as measuring point for the technical object of the operation.
Task Lists

For operations in a task list, technical objects can be maintained.

For measurement readings, measuring points defined for the technical objects can be assigned to the operation.
Work Orders

- For operations in a work order, technical objects can be maintained.
- For measurement readings, measurement points defined for the technical objects can be assigned to the operation.
- The shop floor papers list the measurement points for each operation.
Confirmations

- With the confirmation of the inspection round, work order measurement readings can be entered.
- The entered measurement readings will be saved as measurement documents for the corresponding measurement point.
What’s New for EAM in Enhancement Package 4?

- Rotables Management (Internal, Sub-Contracting and Warranty Claims)
- Integrated Service Procurement
- Inspection/Operator Rounds
- Continuous Improvements
SAP ERP 6.0 Enhancement Package 4: Continuous Improvements for EAM

- Fleet Maintenance, including SAP NetWeaver BI Business Content for Fleet
- Time Zone Support
- Maintenance Cost Budgeting (MCB)
- Flexible Reporting
- Work Clearance Management (WCM)
- Authorizations
- SOA Services
- Other

(See appendix material on conference CD for further details)
• Plant Maintenance
  • Additional flag added to Maintenance Plan Item “Do not release immediately” which overrides the presetting in the order type customizing
  • See whether documents are attached to an order via Generic Object Services
  • List processing for Equipment and Functional Location lists enhanced to include Maintenance Plan Item information
  • Review changes on task lists
  • Ability to change material requirement date on order
  • SAPscript Forms converted to Adobe Print Forms

• Maintenance Event Builder (MEB)
  • Improvements in assignment of WBS elements to orders
  • Enhanced authorization checks for Technical Objects

• Configuration Control
• Logbook
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Enterprise Asset Management Plans for Enhancement Package 5

- EAM Simplification for Maintenance Workers
- Maintenance Cost Budgeting continued
- Inspection Rounds extended
- Rotables enhancements continued

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EAM Simplicity — Project Charter

Definition
EAM’s simplicity project provides an easy-to-deploy and easy-to-use user interface. Information is provided in an intelligent way to foster efficiency and productivity for occasional users. The user interface is based on the standard of SAP NetWeaver Business Client and includes an enhanced EAM dashboard and analytics.

Development scope
- User interface
- Easy to deploy
- Powerful and easy-to-use search
- Simplified and streamlined EAM end-to-end business processes
- Simplified integration and adaptability

Business value
- Easy to learn and easy to use
- Increase productivity and system acceptance
- Flexibility and adaptability for user demands
- Data quality and motivation
- Easy to deploy and easy to change for faster ROI
- Reduces software maintenance costs
### Screen Prototype: Job List

#### Job List

**View** | **Start Date** | **End Date** | **Priority** | **Work Center** | **Person Responsible Name**
--- | --- | --- | --- | --- | ---
Standard View | 2008.10.10, 08:00 | 2008.10.10, 16:00 | High | Mechanics A | Wayne Intrazyatz
Standard View | 2008.10.10, 08:00 | 2008.10.10, 16:00 | Medium | Mechanics A | Wayne Intrazyatz
Standard View | 2008.10.10, 08:00 | 2008.10.10, 16:00 | High | Mechanics A | Wayne Intrazyatz
Standard View | 2008.10.10, 08:00 | 2008.10.10, 16:00 | Low | Mechanics A | Wayne Intrazyatz
Standard View | 2008.10.10, 08:00 | 2008.10.10, 16:00 | Very High | Mechanics A | Wayne Intrazyatz

**Details for Selected Job**

- **Responsibilities**
  - Main Work Center: WWWWWWWW
  - Plant for Work Center: WWWWW

- **Location Data**
  - Maintenance Plant: WWWWW (DESCRIPTION_WWWWWWWWWWWWWWWWWWWWW)
  - Location: WWWWWWWWW (DESCRIPTION_WWWWWWWWWWWWWWWWWWWWW)
  - Room: WWWWW
  - Plant Section: WWW
  - Person Responsible: WWWWWWWWW
  - Work Center: WWWWWWW (DESCRIPTION_WWWWWWWWWWWWWWWWWWWWW)

- **References**
  - Leading Document: No
  - Technical Object: WWWWWWWWWWWWWWW (DESCRIPTION_WWWWWWWWWWWWWWWWWWWWW)
  - Technical Object Type: WWWWWWWWWWWWWWW (DESCRIPTION_WWWWWWWWWWWWWWWWWWWWW)
Screen Prototype: Asset Viewer

Asset Viewer

Technical Object XYZ > Technical Object EQ P3000-N004

Details for Technical Object EQ P3000-N004

Status: INST
Valid From / To: 26.04.2008 / 31.12.9999

Technical Object Options: 
Navigator Settings: 
Additional Functions:

General Data
Class: ED12
Object Type: 1000
Authorization Group: 0001
Weight / Unit: 1531.9312
Size / Dimension: 378.12
Inventory Number: 378.12
Start-Up Date: 31

Reference Data
Acquisition Value / Currency: 0.001
Acquisition Date: 10.04.2008

Location Data
Maintenance Plant: 1000
Location: Hamburg
Room: Storage Location A
Plant Section: 1
Work Center: ABC

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Resources

Description of SAP Service and Asset Management solution including EAM
- www.sap.com/solutions/sam

SAP Service Marketplace — Enterprise Asset Management
- https://service.sap.com/eam *

Description of Business Function Sets and Business Functions within EhP 4

The Enterprise Services Workplace on SDN
- www.sdn.sap.com/irj/sdn/esworkplace

EAM-related Enterprise Service wikis
- https://wiki.sdn.sap.com/wiki/display/ESpackages/Asset+Configuration

* Requires login credentials to the SAP Service Marketplace
Ramp-up Knowledge Transfer

Update Your Core Competence - Must Know

<table>
<thead>
<tr>
<th>Topic</th>
<th>Open/Close</th>
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Summary Open/Close

Please remember to save & close whenever you leave this learning map.
7 Key Points to Take Home

- Enterprise Asset Management supports the complete life cycle of an asset
- SAP ERP Enhancement Packages deliver new functionality — just like full releases — while limiting the upgrade effort and risk significantly
- SAP’s development roadmap for EAM includes SOA enablement, retrofits of industry functionality into the standard, and process and UI simplification
- Enhancement Package 3 has introduced new functionality for complex subcontracted refurbishment, pool asset management, and shift reports
- Enhancement Package 4 delivers Rotable Management, a new level of integration with SAP SRM for advanced Service Procurement, and support for Operator Rounds
- All enhancement packages include several continuous improvement points based on customer feedback
- The upcoming Enhancement Package 5 will deliver simplified functionality for maintenance technicians that does not require portal deployment
Thank you! Questions?

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