

# PEOPLESOFT ENTERPRISE IT ASSET MANAGEMENT 8.9



*Greater Insight into IT Asset Performance*

*Streamline IT Asset Lifecycle*

*Ensure IT and Corporate Compliance*

*Enterprise-Wide Integration*

Oracle's PeopleSoft Enterprise IT Asset Management streamlines and automates the physical, financial and contractual management of technology assets. IT Asset Management helps you:

- Control IT costs for licenses, hardware and service
- Ensure compliance with Sarbanes Oxley, Business Software Alliance, HIPPA, etc.
- Align IT help desk and software service resources with industry best practices

Whether your company is a corporation, private business, government entity or education institution, IT Asset Management offers a comprehensive solution for reducing hardware/software costs, controlling service expenses and automating software and regulatory compliance.

PeopleSoft Enterprise IT Asset Management 8.9 is a fully integrated solution for the management of distributed IT assets including software, servers, laptops, desktops and PDAs. IT Asset Management integrates with PeopleSoft Enterprise Financial Management 8.9 & PeopleSoft Enterprise CRM IT Help Desk to automatically reconcile physical and financial IT inventory, redeploy underutilized software, provide service agents with visibility into actual hardware/software configurations and help divisions meet growing compliance requirements. IT Asset Management also leverages PeopleSoft Enterprise 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** 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.
- **ASSET RECONCILIATION** uses configurable business rules to enable organizations to compare what has been discovered against what is recorded in the Asset Repository Manager ("Asset Repository"). The Asset Repository -- new in Financial Asset Management 8.9 -- 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.
- **HELP DESK** leverages the 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 Enterprise 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** to help control IT costs are provided with roles-based dashboards including license utilization, hardware statistics, lease statistics, and license costs, along with the ability to drill into the associated detail.

### Solution Integrations

- Pre-requisites: IT Asset Management 8.9, Financial Asset Management 8.9, Asset Lifecycle Management Portal Pack 8.9
- Related integrations:
  - IT Help Desk, Human Resources, Maintenance Management, asset discovery partner integration
  - Real Estate Management
  - ESA for IT, Strategic Sourcing, Services Procurement, eProcurement

### Greater Insight into IT Asset Performance

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. IT Asset Management is pre-configured with a best-in-class third part asset discovery product 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, 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, and assets that unexpectedly stopped reporting to inventory.

The screenshot displays the PeopleSoft IT Asset Management interface. It features a navigation menu on the left and several data-rich panels on the right. The 'Asset Financial Statistics' panel shows a table with columns for Division, Avg Life, Year to Date, Units, and Net Book Value. The 'Inventory Exceptions' panel lists various business rules and their corresponding exception counts. The 'Lease End Metric' panel provides details on lease terms and expiration dates. The 'Software Progress Report' and 'Software Inventory Monitor' panels offer insights into software usage and license management.

DIVISION	Avg Life Remaining	Year to Date Depreciation	Units	Net Book Value
ADMIN_DIV	33.0	0.31	24	3.51
NO_DEPTID	30.8	49.35	141	635.30
ENGR_DIV	N/A		71	

Business Rule	Exceptions
Custodian Differ	39
Custodian DeptID Differ	36
Unauthorized Software	61
Asset not in ARM	6
Asset not in Discovery	60
Manufacturer Differ	11
Model Differ	9

Lessor	Days Before End Date	Lease
DELL-001	3	Dell laptop lease
HP-001	3	HP Compaq laptop lease

Software Title	Inventory	Installed	Authorized	Unauthorized
Adobe Acrobat	50	17	3	14

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

- Inventory Exceptions: Displays a high level view of the differences between discovered IT asset inventory vs. what is recorded on the books.
- 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.

- **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.
- **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 leases renewals with the expiration date, along with drilldown capability into the associated leased assets.

**Streamline IT Asset Lifecycle**

A key feature of the IT Asset Management solution is the ability to compare what has been discovered against the financial records and highlight those exceptions so the appropriate action can be initiated to resolve those differences.

The asset reconciliation engine compares discovered asset inventory to that stored in the Asset Repository. 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:

The screenshot displays the 'Assets with Rule Exceptions' page in the Oracle ITAM system. It features a table with columns for Business Unit HR, Business Unit AM, Department Discovery, Department ARM, Location Code Discovery, Location Code ARM, Custodian Discovery, Custodian ARM, and Software. Below the table, there are sections for 'Confirm Actions', 'Action Settings', and 'Reconcile'.

Item	Business Unit HR	Business Unit AM	Department Discovery	Department ARM	Location Code Discovery	Location Code ARM	Custodian Discovery	Custodian ARM	Software
1	US002	US001	43000	41000	US002	US002	KUJ007	KUTZ485	
2	US001	US001	41000	22000	GBR001	GBR001	SP109	SP109	
3	US002	US001	11000	22000	QUEBEC	QUEBEC	KUTZ492	KUTZ494	
4	US002	US001	41000	13000	US002	US002	KU0042	KUJ006	

  

Item	Rule Description	Available Action	Set Scope	Scope	Comments
1	Unauthorized Software	Email Custodian	No Action	0	
2	Unauthorized Software	Email Custodian Manager	No Action	0	
3	Unauthorized Software	Email Primary User	No Action	0	
4	Unauthorized Software	Email Primary User Manager	No Action	0	
5	Unauthorized Software	Email Software Group Owner	No Action	0	
6	Custodian DeptID Differ	Update Custodian DeptID	Selected Assets	1	

- Configurable business rules enable users to define data points and remedial action recommendations for reconciling discovered IT assets with IT assets recorded in the Asset Repository.
- 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 paglet. 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.
- Nonreporting assets are tracked and audited according to user-defined rules.

A significant portion of the ongoing cost of supporting IT assets includes servicing those assets. The CRM IT Help Desk provides case management and solution delivery tools specific to resolve IT problems and requests. Maintenance Management provides integrated maintenance tracking to capture IT asset maintenance costs. Combined with 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 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 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.
- Collect statistics to manage under-utilized hardware & software.
- Store usage data in the Asset Repository to easily assess ownership and cost.

**Enterprise-Wide Integration**

PeopleSoft Enterprise IT Asset Management is a fully integrated solution that shares information seamlessly across the enterprise with PeopleSoft Enterprise Financial Management (for accounting functions), PeopleSoft Enterprise Human Resources (for employee information), and PeopleSoft Enterprise Supply Chain Management (for procurement) to perform the key IT asset management business processes of planning, requisition, acquisition, discovery and reconciliation of IT assets. Additionally, the IT Asset Management solution integrates with PeopleSoft Enterprise CRM IT Help Desk and PeopleSoft Enterprise 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.

**Oracle's PeopleSoft Enterprise Financial Management Solutions**

Oracle's PeopleSoft Enterprise IT Asset Management is part of our comprehensive suite of powerful financial transaction and analytical applications. These solutions empower finance organizations to drive enterprise value with integrated business processes that deliver financial plans, self-service collaboration, transactions, controls & measurements to all aspects of the business. More than 30,000 companies in 150 countries have licensed Oracle E-Business Suite, PeopleSoft Enterprise, JD Edwards EnterpriseOne, and JD Edwards World solutions.