

Current Practices Report



**Cross-Industry Analysis of Infor EAM
to Improve System Usage and ROI**

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EXECUTIVE SUMMARY

We know what you're thinking—this wasn't the title of the survey I took. I want to be the best, so I need a "Best Practices Report."

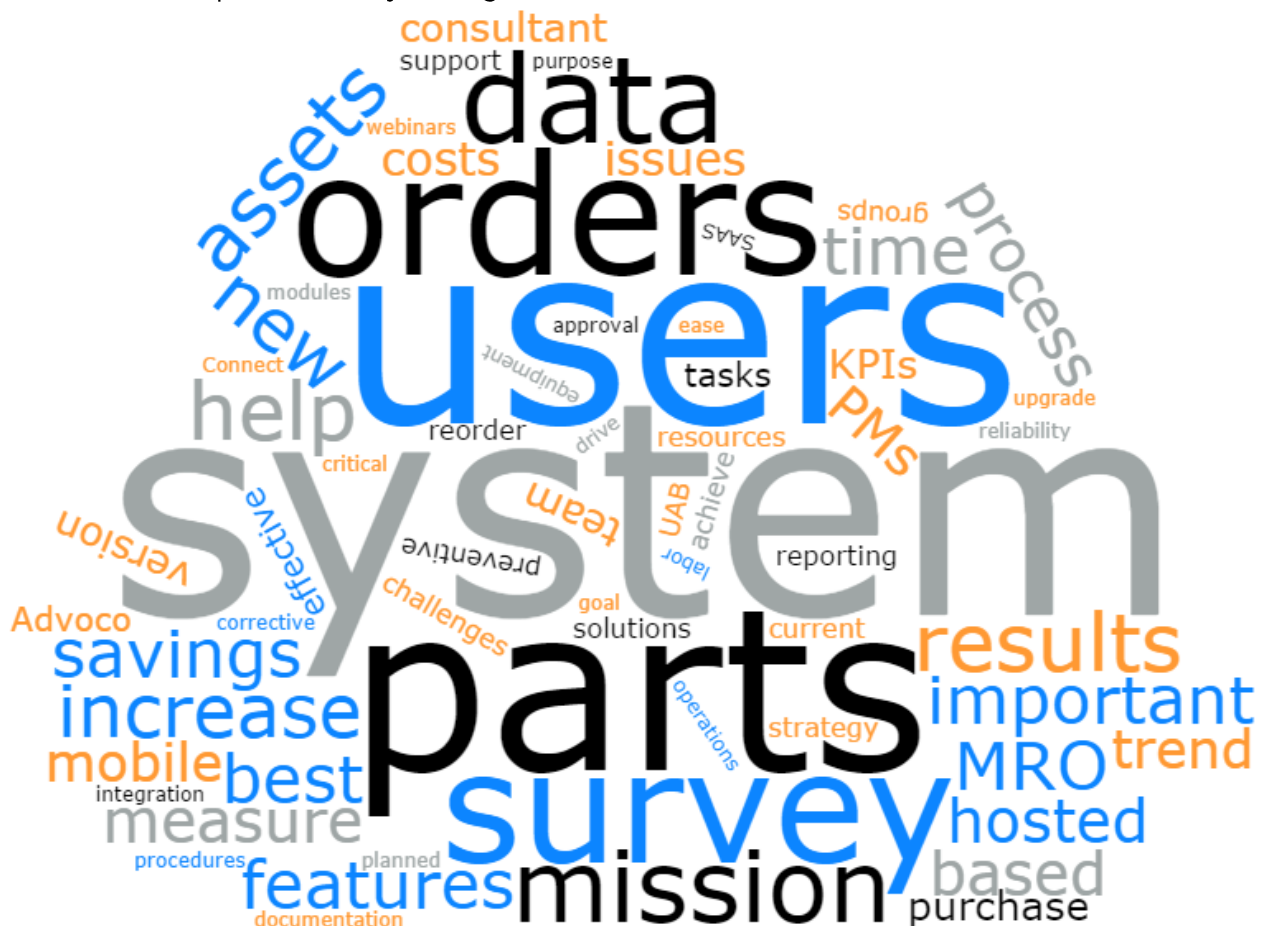
Honestly, we have always felt a little funny about "Best Practices." Everyone loves to use the term; however, we can't help but question it. What does the term even mean? How do you measure it? How do you know when you've achieved it?

There are some flawed assumptions behind "Best Practices." Namely, it does not take into account differences in context, and "best" implies there is no room for improvement.

That's why we've decided to turn the tables and do away with "Best Practices." Instead, calling this our "Current Practices Report" because that's exactly what we were asking about—your *current* practices. Calling it a "Best Practices Report" is a misnomer, because what may be a "Best Practice" for one organization, could be a very bad practice for another. With this "Current Practices Report" you can read through, digest, and pick out **what makes sense for your unique organization**.

The data in this survey was collected on current practices from across multiple different industries, analyzed, and now we are excited to share our findings. We want to share other users' experiences with their Infor EAM system with you—the positives and the negatives, so we can all benefit from the trends and anomalies.

We are hopeful that this report changes the way you see "Best Practices" and helps you understand that one single "Best Practice" does not exist. Instead, we're challenging you to look at this "Current Practices Report" and chart your own course towards a personal solution, to match the unique needs of your organization.



ABOUT THE SURVEY

This report offers the results of an independent survey of nearly 100 Infor EAM users, representing over 50 different companies. Conducted by Advoco, the survey gathered important data from participants who actually use the system, including system administrators, maintenance managers, executive management, parts coordinators, maintenance planners, and more. In fact, nearly 80% of our respondents use Infor EAM on a daily basis. All the information regarding the respondents is confidential.



MANUFACTURING:
41.3%



**PROFESSIONAL
SERVICES:**
3.8%



PUBLIC SECTOR:
30%



ENERGY:
2.5%



**FACILITIES
MANAGEMENT:**
6.3%



CHEMICAL:
2.1%



AEROSPACE:
3.8%



OIL & GAS:
1.3%



FLEET:
3.8%



**RESEARCH AND
DEVELOPMENT:**
1.3%



PHARMACEUTICAL:
3.8%

**INDUSTRIES REPRESENTED
BY 2016 RESPONDENTS**

TOP 5

As we began sifting through the survey results, significant data and trends began to reveal themselves. From these trends we developed our “Top 5” section that are the five key factors that stood out to us most from the survey. These 5 themes will drive your company to take advantage of Infor EAM and will be the foundation for you to start thinking differently. The Top 5 Key Factors cover (1) metrics, (2) usage of the system, (3) maintenance performance and mission, (4) professional engagement, and (5) versions being used and hosting.

1. Metrics



Metrics are essential to maintenance improvement.

Peter Drucker says, “If you can’t measure it, you can’t improve it.”

If your goal is to improve maintenance, then you need to measure what percentage of your work is planned and how effective were the plans.

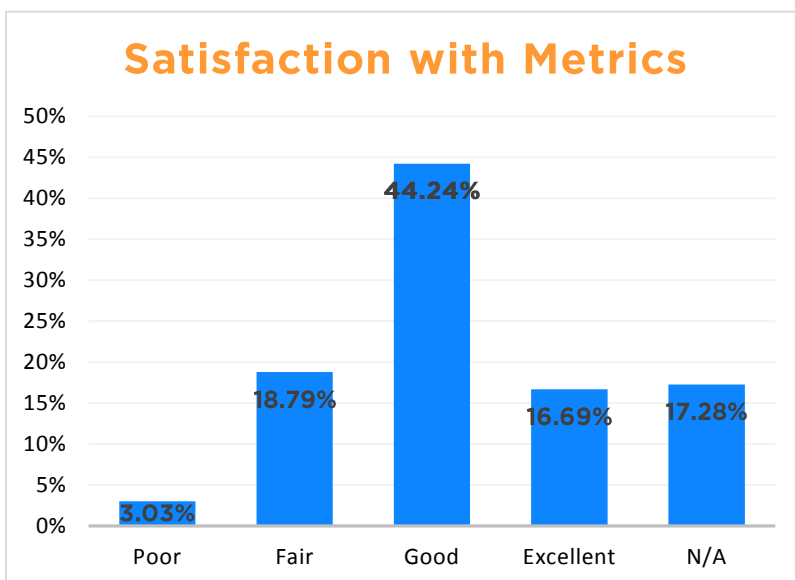
-Joe Mandracchia, VP of West Coast Delivery

Over 70% of respondents are using metrics and scorecards to assess and monitor the performance of their maintenance program, up over 20% from 2012. While we found that increased use of the system is widespread, including for metrics and scorecards, we did not see a major increase in satisfaction with metrics and scorecards, showing us that there is room for growth and more training on this particular topic.

In the survey we asked, “How would you rate your Scorecards/Metrics?” Only 17% of respondents chose “Excellent” to describe their metrics. In our 2012 report, we noted that metrics can be extremely powerful when used correctly. Organizations gather an enormous amount of data about the assets they use and maintain, but for this data to be useful, companies have to ask, “What do these metrics tell us?” And, “How can they help us positively impact business performance?” Organizations are struggling to understand what they should be measuring and searching for in regards to maintenance. The data alone gathered about assets is not valuable; it must be converted into useful information. This information will enable companies to make important decisions, improve processes, and produce cost savings.

For respondents who were rating their scorecards and metrics with a poor, fair, or good, in order to make the jump to ‘excellent,’ we believe it is important to fully understand the capabilities of scorecards and metrics and implement them in your EAM system.

To determine what metrics your organization should be developing, you first need to understand what questions you are looking to answer. What knowledge are you looking to gain from your EAM data: How to improve up-time? Make a fix-



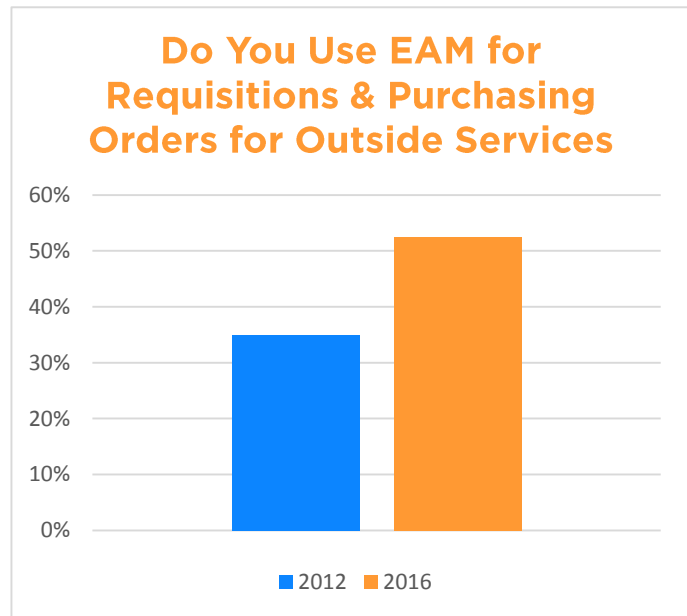
or-replace decision on key equipment? Reduce maintenance labor costs? Understanding what is of value to your organization helps guide the metrics and reporting you should be getting from your EAM solution.

2. Increased Use of the System

We were very interested to see that the respondents from this 2016 survey seemed much more engaged with the technology than the respondents from 2012. In 2012, one of the major themes we wanted people to takeaway was that users can get more out of their system, and we are glad to see that people have heeded this advice.

Daily use of the system remains high—nearly 80% of respondents said they use their Infor EAM system on a daily basis, a slight increase from 2012.

We saw major increases in the percentage of people using Infor EAM for requisitions and purchase orders for MRO and outside services. In 2012, only 34% of respondents were using EAM for requisitions and purchase orders for outside services. We saw a big increase when respondents were asked the same question in 2016, with over half of all respondents saying that they do use EAM for that purpose. This significant increase in usage shows us that people are becoming more engaged and using the full scope of their systems.



This increased usage across the board shows us that people are becoming more comfortable with their systems and are thus using more of the breadth of capabilities, allowing them to do more with increased efficiencies.

3. Maintenance Performance & Mission



You must measure maintenance performance to improve it. Of the multitude of measurements, consider starting at your planning effort. If you believe planned work is safer to execute, creates efficiency and effectiveness, and overall is less expensive; then you should measure what percent of your work is captured on a work order, of that percentage what was planned, then what percentage of planned work was completed on time and finally beyond reconciling labor and materials what percentage of planned work captured the problem and remediating action codes to feed back into the system for reliability analysis? You measure these things and you will improve.

-James Rogers, VP of Reliable Operations

The majority of respondents, over 50%, said that their company chose Infor EAM for improved maintenance performance. We agree EAM has the principal purpose of improving maintenance

performance. Our questions now are: What about maintenance needs improving? How do you improve it? How do you measure the results? In terms of what needs improving, is EAM being used to manage maintenance cost (e.g., labor, parts, services) or is it being used to manage equipment reliability (e.g., uptime, downtime) or both? **Both** is the right answer and to do this you need to capture all of your work on a work order and reconcile labor, parts, and services (this is your cost component) and also reconcile your Problem, Failure, Cause, and Actions Codes (this is your reliability component). There are several indicators that will tell you whether these actions are affecting maintenance performance; two we like are MTTR or Mean Time to Repair and MTBF or Mean Time Between Failures.

We are big fans of the maintenance mission: it defines the maintenance organization's purpose and aligns it with the other organizations in the company. We were pleased to see that 63% of respondents said they have a formal maintenance mission. We believe the mission should be concise (use just a few, simple words) and describe an achievable deliverable. For example, 'maintenance delivers the safe, reliable equipment that enables Company XYZ to achieve its operations mission.' Besides being concise, it is also important to ask yourself two questions about your maintenance mission: Is it displayed somewhere for your team to see? And also, can your team recite what it is?

Just as we are big fans of the maintenance mission, we are also big fans of having a maintenance strategy: this is your process and roadmap to achieve your mission. There are many formal maintenance strategies to adopt and all require discipline to manage your maintenance value stream: the identification, planning and scheduling, execution and closure, and reporting of maintenance work. These fundamentals of maintenance are your Standard Operating Procedures (SOPs) and can be configured and managed within EAM; in fact, EAM should be your catalyst for adoption and enforcement of your SOPs.

4. Professional Engagement with EAM



**Your team cannot improve without the appropriate training:
Left to their own devices, users will create their own devices.
Without proper and continued training, users will create their own way to complete tasks, which could spell trouble down the road.**
-Marty Osborn, Partner

When it comes to personal development around Infor EAM systems, we were surprised by the lack of commitment to ongoing training and professional engagement.

From a training perspective, regular training is seldom, if ever, offered to Infor EAM users. 75% of respondents said they either do not provide regular training or only provide training on an "as needed basis." Regular training is incredibly important in order to stay up to date on the latest EAM advancements so it is paramount to commit and budget for more training of your team. This training can range from end-users 'how to's,' to management training on they 'whys' of the system.

Proper training can also result in cost savings for your organization. For example, if you are not capturing true costs on a work order – both time and parts – you cannot assess an accurate cost for maintaining a piece of equipment which impacts your decision as to when it is time to be replaced. Only 28% of respondents indicated that they consistently use their Infor system to capture parts issued to work orders.

When asked about involvement in professional groups focused on Infor EAM, nearly 90% of respondents said they are not involved in any type of group. This was surprising for us because

we find that people who are thirsty for EAM knowledge and who don't receive regular training, would benefit greatly by taking advantage of opportunities to learn from others in professional groups. While the Infor EAM community continues to grow, there are always new ways to get plugged in including:

- **LinkedIn Groups:** LinkedIn is a great resource for you to connect with other Infor EAM professionals. There are several groups for Infor EAM users including the [Infor EAM Group](#). Also, we have a group on LinkedIn for our Advoco Connectors (people like you who have participated in our events), which you can find [here](#).
- **Advoco Connect:** An annual user conference hosted by Advoco that gives attendees the opportunity to explore the power of their EAM system and join a thriving community of EAM professionals who are passionate about their work. For more information, visit advococonnect.com.
- **Society for Maintenance and Reliability Professionals (SMRP):** A nonprofit professional society formed by practitioners to develop and promote excellence in maintenance, reliability, and physical asset management while creating leaders in the profession. For more information, visit smrp.org.
- **Infor User Advisory Board (UAB):** A group of Infor EAM users who work to enhance EAM design and effectiveness; improve EAM support and services; and improve EAM understanding, best practice, and knowledge. For more information, visit inforcommunities.com.



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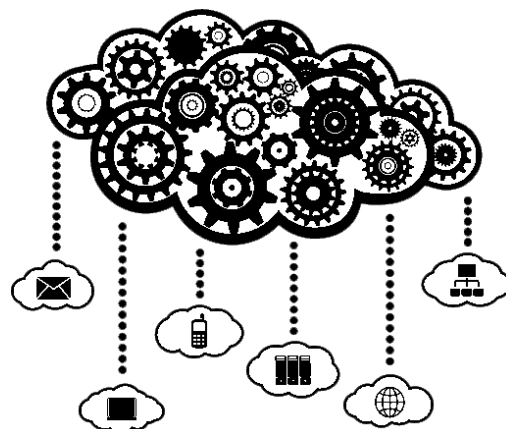
Customer Communities

5. Version & Hosting

From our knowledge of Infor EAM systems, we know the current emerging trend is a movement toward SaaS/cloud-based solutions. This trend away from internally hosted solutions is a way to streamline the process, reduce the demands on the IT department, and eliminate the ongoing challenges of managing an ever changing infrastructure environment. Infor is pushing new clients toward SaaS and looking at our recent clients, approximately 75% have opted for a SaaS-based solution.

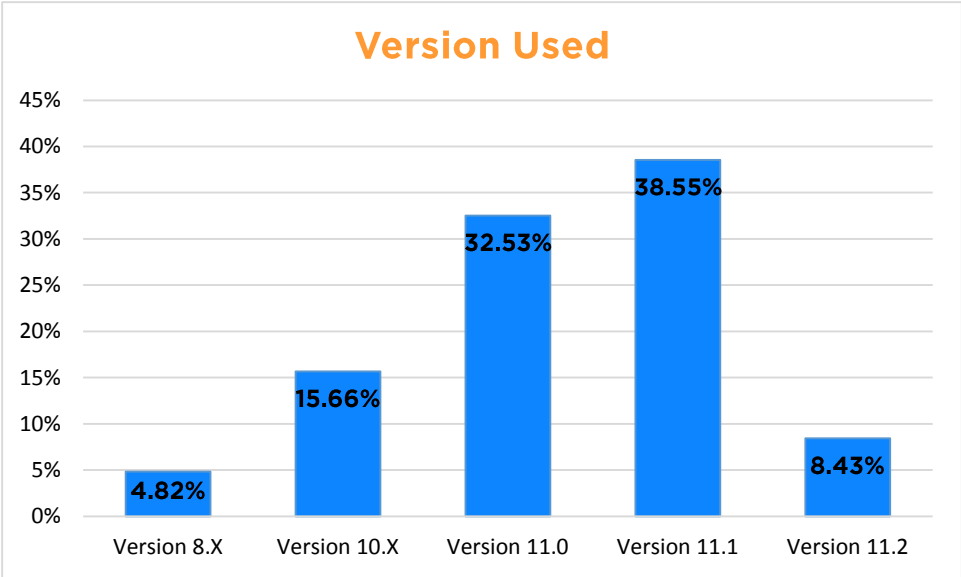
While our survey did not directly support this trend, we believe that this is due to the fact that such a large percentage of respondents are long time Infor users. 70% of respondents have been using Infor for more than three years. This would likely explain why almost 80% of respondents are hosting in-house. The move to SaaS/cloud-based hosting is a newer trend.

Although respondents are more likely to be hosted in-house, this did not impact the version of Infor used, as we would have thought. 80% of respondents are using version 11.0 or higher, showing us that users are upgrading at a more rapid pace, despite being hosted



in house (or simply 'self-hosted') versus hosted by Infor. We attribute this to the increased ease of upgrading, coupled with a desire for new capabilities and functionality available in newer versions.

While the trend is still catching on, it is our opinion that users should seriously consider moving to SaaS and cloud-based solutions in order to help with ease of upgrade and help get full functionality out of your system.



OTHER INSIGHTS

The majority of survey participants are satisfied with Infor EAM, stating configurability, functionality, mobility, and user friendly aspects as their most liked features of the software. These recurring thoughts from respondents show us that users are taking full advantage of the configuration options available to them through features like hyperlinks, screen cache menus, dataspies, inboxes, and screen clean-ups (simplification).

Additionally, we saw reoccurring themes with the least liked features of the software. The following insights will help you alleviate some of the challenges that came up the most from respondents.

- A real challenges seems to exist with **lack of training** on the Infor EAM software. Many of the least liked features mentioned by respondents are issues that could be fixed with training. For example, scheduling, hyperlinks, dataspy set up, and hourly based PMs. We suggest that if there is a specific facet of your configuration that you are unhappy with, training in this can help you to familiarize yourself with it and thus get more out of your system.
- According to our survey, a large number of respondents had issues with the **general performance** of their system. If you are self-hosted and having performance issues, you may need technical support from a person specifically trained in Infor. Additionally, in the latest versions of Infor EAM, many of the issues mentioned have been addressed, including the ability to setup the Start Center and Screen List View layouts for new users

and the functionality to see when users last accessed something. In general, performance issues can be alleviated by staying up to date with the most current version of Infor as well as having access to someone who is specifically trained in technical support of Infor. Some things to look out for:

- › Poorly performing flex
 - › Dataspies that query your whole database
 - › Lack of resources – CPU and RAM on your EAM application and database servers
 - › Database tuning – especially usage of table indices
- There were quite a number of topics that came up that could be rectified with **system enhancements or help from a consultant**. For issues with things such as documentation, reporting/metrics, stores, or user groups, using a qualified consultant to help you streamline modules could dramatically increase your capabilities in your Infor EAM system.
 - We also noticed a pattern of **problems with purchasing**. In order for purchasing to be effective, you need to first take the time to map out your purchasing flow and configure your EAM process to match this process flow. We are finding that more and more clients are asking us to assist in EAM assessments to help get better use, functionality and results out of their systems. An assessment of your EAM system can help fix issues such as purchasing processes.
 - While not explicitly included in the survey, one area where we have seen significant interest and work across Infor's EAM client-base is **integration**. The majority of these are focused on purchasing - linking EAM to corporate ERP/finance systems. This indicates two key facts: (1) EAM is now viewed as a key enterprise-level solution that is being tied into broader company-wide systems; (2) clients are seeing this as an area where there is the ability to gain cost savings – through improved data accuracy and through reducing operator time/double data entry.

RECOMMENDATIONS FOR THE FUTURE

As we wrap up our thoughts from this survey, we wanted to leave you with a checklist of recommendations to drive future improvement.

- | | |
|--|--|
| ✓ Many of you said you have a formal Maintenance Mission. If so, what is it? | What is that Mission? Is it hung on the wall? Once you give an identity to the Mission you are looking to achieve (no longer 'it'), you're <i>committed</i> , you'll <i>invest</i> , and you'll <i>sacrifice</i> for its success. |
| ✓ Does your team need training? | <p>Training improves EAM usage through increased user knowledge, consistent Infor EAM processes, greater user acceptance, quicker and easier implementations, fewer support requests, and overall improved employee productivity. By being able to create your agenda on the EAM subjects you need within the scenario that best suits you, you will walk away with new knowledge and understanding that will cultivate success.</p> <p>Some options that you might consider include:</p> <ul style="list-style-type: none">• UAB• Advoco Connect• Inforum• Online events like webinars |
| ✓ What is one thing that really resonated with you in this report? | Start with the one major action item that you can work on and come up with a plan to make that change happen. |
| ✓ Do you have a proper mobile solution for your Infor EAM system? | <p>The world is becoming more and more mobile and using devices to complete tasks more frequently. Infor EAM mobile can be a huge time and money savings for your company as it takes away time spent going back and forth to enter data. Some major perks of going mobile include:</p> <ul style="list-style-type: none">• Time efficiency - Users do not have to leave the plant floor to enter in data.• Cost savings - At least one hour per day per technician.• Easy access - Parts and instruction right at the technician's fingertips.• Live time - Real-time update of work. |
| ✓ Are you taking advantage of the latest available features? | <p>Some helpful features that you might consider include:</p> <ul style="list-style-type: none">• Case management can be used to record important events without creating a work order.• Install parameters that allow user to easily rebrand Infor EAM log in page and header of application.• Checklists have been added to tasks to allow for gathering of numerous data points for reporting and observation purposes.• Condition based parts give the user the ability to receive and issue parts at different prices based on condition of the part. An example of this can be used for refurbished parts at \$50 vs. new parts at \$150. |

FINAL THOUGHTS FROM THE ADVOCO TEAM

When the term “Best Practices” is used, it implies that you have reached the summit, and there is no more opportunity for advancement or improvement. We know that this is never the case—you can always improve, growing your knowledge and expanding your understanding and use of the system. That’s why we are proponents of doing away with “Best Practices” in favor of “Current Practices,” and we hope you agree with us.

We are thankful for each of our respondents who shared their real, current practices with us, which we could in turn share with you. When we come together as a community of users invested in Infor EAM, there is tremendous potential for learning and growth.

The data that was collected gave insight into how users are managing their Infor EAM system and what areas of improvement exist across the board. We hope that you found something in this report that resonated with you and that you will take this, share it with your team, and make improvements to your own EAM system.

THE RESULTS

You & Infor EAM

1-2. Length of time using Infor EAM

The survey indicated that most respondents have used Infor EAM software for more than 3 years, both organizationally and personally. 70% stated that their organization has used the product for longer than 3 years and over 60% stated they have used the product for more than 3 years themselves. These results show that the vast majority of those who completed this survey are long-time users.

3-4. User role and frequency of product use

Most respondents hold maintenance manager, supervisor, and IT positions, demonstrating that the answers to the survey questions are more user-based - coming from those who actually use the Infor EAM system regularly. In fact, the respondents are very active users, with nearly 80% using the product on a daily basis.

5. Software skill level

On a scale of 1-5, (1 being basic knowledge and 5 being expert) the average response was slightly less than 4. This shows us that users are comfortable with the software, but there is room for continued growth and education.

6. Professional Infor EAM organizations

Approximately 90% of respondents are not involved in a professional organization focused on Infor EAM. Of respondents who were involved in a group, Infor UAB was the most common organization.

7. Infor EAM hosting

There are significantly more respondents who host Infor EAM in-house than who host with Infor; 76% of respondents host in-house.

ROI from moving to Infor hosted EAM is often fast. Less IT costs and upgrades are handled seamlessly.

-James Crow, VP, Technical Delivery

Your Company & Infor EAM

8. Reason for selecting Infor EAM

According to more than 50% of respondents, the primary reason their company selected Infor EAM was to improve maintenance performance.

This begs the question, did maintenance performance improve?

-Marty Osborn, Partner

9. Using a consultant for Infor EAM

Nearly 90% of survey respondents have used a consultant for assistance with Infor EAM, indicating that users see the value in utilizing professional, expert help. What is also interesting to note is that those respondents who used a consultant were more likely to report later in the survey that they were satisfied or very satisfied with their Infor EAM implementation.

10. Reasons for using consultants

The survey results show that there is versatility in how companies are using Infor EAM consultants. However, the top three reasons that respondents selected were implementation, training, and integration. Others use consultants for project management assistance. It is apparent that respondents realize that consultants enable them to better understand their Infor EAM software, which, in turn, allows them to take advantage of the full value of their product.

11. Infor EAM version

If you are on the newest version, you can take advantage of the updated features, like Case Management in v 11.2. This allows reporting events that happen at a plant without having to create a work order.

-Michele Page,
Solutions Training Coordinator

Roughly half of all respondents are using version 11.1 or higher. This is significantly different than our 2012 report where most respondents were unaware of which version of Infor EAM they were using. We attribute this shift to the ease of upgrades and the increased features and functionality that are available with each new upgrade. It is interesting to note that several respondents were still using versions 8.x or 10.x. As Infor continues to drive new releases, adding new or improved product features to create the most powerful EAM software on the market, companies should

consider upgrading to new releases so as not to miss out on needed functionality and to avoid the more involved process of upgrading after getting far behind in the upgrade process.

12. Infor EAM training

About 75% of respondents said that they do not provide regular training for their Infor EAM users. With regular training, Infor EAM users are able to better understand the technology and its capabilities and offer improved solutions.

The goal of education is to create people who are capable of doing new things, not simply repeating what others have done.

-Marty Osborn, Partner

13-14. Using Infor EAM modules

When it comes to which modules Infor EAM users turn to most often, it is clear that companies rely heavily on a select few to manage everyday operations. Close to 100% of respondents answered that they use the Work Orders module, followed closely by Preventive Maintenance, Assets, and Parts, respectively. These responses are very consistent with the 2012 data. Only a small number of respondents indicated using Metrics and Scorecards and Safety Management regularly, signifying that companies could be missing opportunities to use their data better.

15-16. Maintenance mission and strategy

Over 60% of organizations have a formal maintenance mission. Almost 70% responded that Infor EAM is tied to a specific maintenance strategy.

You have to weigh-in to buy-in, so create your Maintenance Mission, proudly sign it and hang it on the wall for everyone to see!

-James Rogers, VP, Reliable Operations

Asset Management & Work Orders

17. Assets/equipment in Infor EAM

Optimization of the MRO storeroom supports increased operating efficiencies and generates significant cost savings resulting in new-found discretionary cash. Skilled maintenance staff dealing with vendors and chasing parts increases downtime.

-Sherry Spaulding,
VP, Northeast Delivery

More than 70% of respondents have a large asset base, with 2,000 parts or more in Infor EAM. This shows us that larger enterprises made up the majority of our respondent pool and it also reflects active use of the system. This response is interesting compared with the 2012 data because only about 50% of respondents had 2,000 parts or more in Infor EAM.

18. Using asset hierarchy or organizations for asset access

Over 75% of respondents utilize hierarchy or organizations to facilitate asset access, an increase of 25% from the 2012 data. Slightly more than 30% indicated that it is "very effective." System hierarchy is highly useful in data analysis, enabling companies to make associations that can lead to significant changes to business processes, generating more value from Infor EAM.

You may have set up the hierarchy, but what are you using it for? Do you know the real power of using hierarchies?

-Marty Osborn, Partner

19-21. Using planning and scheduling features

Planned work affects safety, reaction time, and performance, but have you considered its impact on morale?

-James Rogers,
VP, Reliable Operations

Over 70% of respondents use pre-planned work orders, such as material lists, labor assignments, task lists, etc. Comparing these numbers to the 2012 data, it appears there is a jump in respondents using EAM to pre-plan work orders. Only 60% of respondents currently use EAM systems to schedule work orders. Upwards of 70% of respondents prioritize their work orders.

Using planning and scheduling functionality offers Infor EAM users an opportunity to greatly improve efficiency – allowing companies to schedule jobs, assign personnel, reserve materials, and more. After evaluating the survey results, we determined that this subject may need further clarification to identify how companies are really scheduling work – by date/time, time of day, by importance, etc., and determining if it is organized most efficiently.

22-24. Mechanics receiving work orders

Moving to mobile allows mechanics to receive updated information more quickly. It also improves problem resolution information collection.

-James Crow,
VP, Technical Delivery

Almost 80% of respondents stated that mechanics/technicians receive their work orders in advance using Infor EAM. However, roughly 55% of respondents indicated that the mechanics, technicians, or other staff print the work orders. Because Infor EAM supports mobile technology, we found it surprising that many companies choose to

waste critical resources – time and money – by using precious minutes to manually print work orders on loads of paper each day. As we become an increasingly mobile-friendly culture, it is surprising that there has not been a shift to more mobile use for work

In mobile studies it has been shown that the use of Mobile for work order management can save on average an hour of a mechanic's time each day.

-Marty Osborn, Partner

orders.

Parts Management

25-26. Using Infor EAM to manage MRO parts

Nearly 60% of respondents use Infor EAM to manage MRO parts actively, an increase of almost 20% from 2012. This is a positive trend that demonstrates users are taking advantage of one of the foremost benefits of an EAM system—the ability to manage spare parts. Consistently placing emergency part orders, finding the same product with multiple part numbers, or making duplicate orders means that you are probably spending too much on MRO. Infor EAM enables companies to make informed decisions about MRO spending and gain control over MRO processes, resulting in an immediate return on investment.

27. Using Infor EAM to classify parts

Stop walking past your storeroom! If you can describe it as 'having everything you don't need and nothing you do need,' then take control of the most controllable maintenance cost: MRO and spare parts.

-James Rogers, VP, Reliable Operations

The responses for classifying parts are similar to those for managing parts. A small percentage of respondents - 32% - classify parts, while 31% do not classify parts at all. This is a disappointing trend because standardized naming conventions improve visibility across plants, allowing for better utilization of existing inventory. In addition, standardized naming also reduces the amount of ordering parts already in

stock, saving inventory costs, expediting fees, and reducing unnecessary equipment downtime, inventory ordering, and carrying costs. There is certainly some effort involved in classifying parts, but the results are tangible, leading to real dollar savings.

28-29. Using Infor EAM to optimize parts

Over half of respondents - about 54% - have conducted parts clean up since initial implementation. This is a promising result as it confirms that many users understand the connection between storing "good" data and improving operations. Cleaning up data and inventory, reorganizing, and implementing new processes is a best practice that can produce significant ROI. For example, if you set up your MRO parts warehouse with the proper part numbers and bins, it is easier to identify what you have and determine what you keep. Fortunately, 40% - agree and use part numbers and bins as part of their strategy for organizing and optimizing parts, with another roughly 40% working towards that.

30. Capturing parts issued to work orders in Infor EAM

Only 28% of respondents indicated that they consistently use Infor EAM to capture parts issued to work orders, with another 33% stating "sometimes." Infor EAM offers users the functionality to capture costs and identify those assets that are consuming critical resources. If users are not charging parts to a work order, they are not generating the right information to make the proper decisions - missing opportunities for real savings.

There is big opportunity for savings here!

-Marty Osborn, Partner

Purchasing

31-32. Using Infor EAM for requisitions and purchase orders

61% of respondents use Infor EAM for requisitions and purchase orders for MRO. This is almost double the number of respondents who were using it in 2012. The same is true for using requisitions and purchase orders for outside services, 53% in 2016 versus 26% in 2012. This

shows that users are increasingly becoming aware of the functionality of Infor EAM that allows them to capture costs by assets, resulting in more people using the breadth of their system. When you capture costs, you have documentation – proof as to what is happening. If you do not capture costs, you will be unable to justify, plan, and make the proper decisions.

33. Purchase order approval process

A high number of respondents – over 82% – use a formal purchase order approval process. Adhering to an approval process is crucial for good financial control, and we're glad to see that the majority of users are following this best practice.

34. Using min/max reorder points in Infor EAM for parts

More than 70% of respondents are using min/max reorder points for purchasing parts. Using min/max reorder points is important for automatic reorders, and it is a best practice for companies that are tightly managing their inventory. In 2012, only 33% of respondents were using min/max reorder points in Infor EAM – a considerably low number. This increase shows a trend toward adhering an excellent opportunity for better managing inventory.

35. Integrating Infor EAM with your finance/ERP system

The value of integrating Infor EAM with your finance/ERP system is that it provides the ability to share information, boosting productivity and efficiency. With only 44% of respondents stating that they have integration between systems, many users are missing out on the value of this beneficial practice. This is however, an increase of nearly 20% from 2012, so users are trending toward implementing integration with their finance/ERP systems.

Integration: It makes it better for everyone!
-Steve Brindle, Partner

Integration saves time used to enter the same information into two systems. It also increases information accuracy.

-James Crow,
VP, Technical Delivery

36-37. Using preferred vendors for MRO purchases

Over 80% of respondents use preferred vendors for MRO purchases, and over 50% indicated that they are required to use preferred vendors, depending on the circumstance. Leveraging whom you buy from can help companies obtain the lowest prices.

Preventive Maintenance

38. Generating PM procedures within Infor EAM

A major benefit of Infor EAM is the ability to generate PM procedures. Based on the survey results, most users are taking advantage of this functionality and generating PM procedures regularly.

39. Triggering PMs

Typically, what we have observed regarding triggering PMs is that the complexity of meter-based or condition-based PMs is a challenge for many users. The survey results confirm that most users rely on combination of time and meter-based PMs; however, use of meter-based PMs can provide a company with additional cost savings because they are triggered based on usage rather than an arbitrary timeframe.

40. External compliance/reporting requirements for PMs

The survey results indicate that almost 75% of respondents are required to report on compliance from their PMs. Depending on your industry, reporting may be regulated through the FDA, ATA, or other regulatory agency.

41. Using tasks/check sheets for PM work

Over 85% percent of respondents use tasks or check sheets for PM work. This is a very important part of PM work, and the high numbers indicate that users are taking advantage of this useful functionality.

42. Determining preventive maintenance vs. corrective maintenance

Most companies would agree that it is ideal to have predictive and preventive maintenance at the core of their maintenance program to reduce downtime and inefficiencies. About 40% of respondents are on the right track, answering that 40% - 70% of their work is preventive maintenance. A much smaller number - 7% - stated that 80% of their work is preventive maintenance. Sometimes this is a difficult question in terms of meaning and definition within a company, but the fact is that for most respondents, maintenance is more preventive than corrective. For companies that fall below 40%, there is a big opportunity to be more proactive and eliminate some of those corrective work orders.

Metrics

43. Using Inbox items in the Infor EAM start center

An important productivity tool for the maintenance team, Inbox items in Infor EAM allow users to manage work with a customized “to-do” list. Two-thirds of respondents are using this feature, an increase from 2012. As a starting point, users can begin by tracking what work needs to be done and what is in progress.

44. Using KPIs

KPIs are a way of measuring performance. One of the challenges of KPIs is to build a metric that is important to you or your team. 70% of respondents are using KPIs, a significant increase from the 43% of respondents that were using KPIs in 2012. This is most likely a result of KPIs being easier to use in newer versions of Infor.

45-47. Utilizing metrics and scorecards

One of the benefits and best practices in maintenance is to be able to measure and assess your performance. Metrics and scorecards work like a roadmap - they let you see where you are and where you are going. 70% of respondents are using metrics, an increase from 2012 which signifies that respondents are taking advantage of the opportunity to define what they want to do and where they want to go. Metrics can take you there.