

PM Optimization Checklist

Prepare SAP PM for S/4HANA by Fixing Data, Processes, and UX First

Who this checklist is for

Maintenance leaders, planners, IT, and SAP teams preparing for:

- ✓ ECC → S/4HANA migration
- ✓ RISE with SAP or phased transition
- ✓ PM performance improvement initiatives

Use this checklist to identify gaps **before** migration—when changes are easier, safer, and create lasting value.

Let's Connect

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1. Asset & Functional Location Data

✓ Clear, governed asset structures prevent duplicate records, broken history, and reporting gaps.

Check all that apply:

- Functional location hierarchy reflects how maintenance work is actually planned and reported
- Equipment is not duplicated across plants, locations, or systems
- Equipment is assigned consistently to functional locations
- Asset naming conventions are documented and enforced
- Criticality, class, and classification fields are populated and meaningful
- Decommissioned and obsolete assets are flagged or archived
- Measurement points and counters are active, accurate, and still used

2. Task Lists, Maintenance Plans & Job Quality

✓ Standardized maintenance content improves wrench time and plan adherence.

- Task lists are standardized by asset or asset class (not one-offs)
- Duplicate task lists have been identified and consolidated
- Task list operations reflect current procedures and safety steps
- Estimated labor hours and work centers are accurate
- Maintenance plans are aligned to valid task lists
- Redundant or inactive maintenance plans are retired
- Strategy-based maintenance is used where appropriate
- Plans are reviewed regularly—not “set and forgotten”

3. Master Data Completeness & Consistency

✓ Clean master data = fewer work order errors and faster processing.

- Notification types are rationalized and clearly defined
- Order types are limited, purposeful, and documented
- Priority codes are consistent across plants and teams
- Damage, cause, and activity codes are standardized
- User statuses are understood and used correctly
- Required fields are enforced at creation (not fixed later)
- Data ownership and stewardship roles are defined

If unchecked: reporting becomes unreliable in S/4HANA.

About Transcat

Transcat has over 60 years of experience servicing some of America's largest companies in highly regulated industries. Our experienced teams provide equipment and asset management solutions for high-cost-of-failure environments in **pharmaceutical, biotechnology, and medical device companies, and other FDA-regulated organizations** throughout the US, Canada, Ireland, Europe, and Asia Pacific.

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4. Work Management Process Health

- S/4HANA amplifies good processes—and exposes broken ones.
- Clear process from request → approval → planning → scheduling → execution → closure
- Roles are well defined (requestor, planner, scheduler, technician)
- Notifications are used correctly for work requests
- Backlog is visible, prioritized, and actively managed
- Emergency work is tracked and minimized—not normalized
- Work order completion and confirmations are timely
- Failure data is captured consistently at close

5. Reporting & KPI Readiness

- Protect continuity during transition—no “dark periods.”
 - PM KPIs are agreed and trusted (e.g., backlog, plan adherence, MTTR, MTBF)
 - KPI logic is documented (not tribal knowledge)
 - Reports rely on standard PM fields—not custom workarounds
 - Historical PM data is accurate enough to migrate
 - Reporting dependencies are identified before cutover
- If unchecked:** migration risks breaking executive visibility.

6. Custom Code & Enhancements

- S/4HANA rewards a clean PM core.
 - Custom PM transactions and reports are inventoried
 - Enhancements are still required (business-justified)
 - Legacy workarounds are candidates for removal or redesign
 - Fiori apps can replace custom screens or Z-transactions
 - PM-specific integrations are documented and tested
- If unchecked:** technical debt transfers directly into S/4HANA.

7. Fiori & User Experience Readiness

- UX is where most adoption wins (or losses) happen.
 - Planner, scheduler, and technician roles are clearly defined
 - Fiori apps are mapped to each role’s daily tasks
 - Mobile maintenance use cases are identified
 - Data required by Fiori apps is complete and reliable
 - Security roles are reviewed for least-privilege access
- If unchecked:** users revert to old habits—even in S/4HANA.

8. Governance, Change & Cutover Readiness

- Optimization succeeds when ownership is clear.
 - PM data standards are documented and approved
 - Data quality rules are automated or monitored
 - Cutover approach for PM data is defined (what moves, what doesn’t)
 - Stakeholders are aligned on sequence and scope
 - Training is role-based—not transaction-based
 - Post-go-live support model is defined
- If unchecked:** improvements erode after go-live.

Your Results

Count your checks:

- 60–80% checked:** Strong foundation-ready for targeted optimization
- 40–60% checked:** High-value improvements available before migration
- <40% checked:** Optimize first-migration risk is high

Next Step: PM Readiness Assessment

A **2 week PM Quick Scan** can:

- Baseline your current PM data quality
- Identify top 10 fixes with highest ROI
- Reduce migration risk and rework
- Build a phased, low-disruption roadmap

Getting started

- Free PM Quick Scan (2 weeks): baseline data quality and priority fixes
- Readiness Workshop (half day): stakeholder alignment & roadmap
- Fast-Start Pilot (6–8 weeks): one plant/work center, measurable KPIs

Book your PM Readiness Assessment

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