

Driving Efficiency and Compliance Through Smart Digital Asset Management



Challenges

- Inefficient, paper-based inspection processes that were highly time-consuming
- Lack of visibility into systems requiring monitoring and their scheduled inspections
- Compliance risks from undocumented telephone agreements that cannot be traced

Implementation

Key Objectives

- Digitalization of work order processing in maintenance and mobile inspection tasks
- Ensure internal inspections are fully compliant with legal requirements
- Optimize processes to reduce administrative effort and lead times
- Reassignment of inspection tasks to qualified maintenance staff, enabling the asset management team to focus on strategic priorities

About the Company

Founded in 1948 and based in Hildesheim, Germany, PETROFER is a family-owned manufacturer specializing in industrial lubricants, specialty fluids and process chemicals. With 1,200 employees worldwide, PETROFER is active in 70 countries and operates 10 production sites. As an ISO-certified developer, manufacturer and supplier of chemicals, the company serves a broad range of industries including automotive, aerospace, foundry and heat treatment, metal processing as well as paper and tissue production. PETROFER's hallmarks are its flexibility and quick responsiveness, delivering tailored solutions to both major corporations and specialized niche markets alike.

60%

time saved
in inspection
processes

4850

assets
digitally
documented

Cloud
migration
completed in
just

04 months

When PETROFER rolled out SAP company-wide, the central asset management department at the headquarters decided against adopting the SAP maintenance module. With around ten years of experience using Ultimo On-Premise, especially for inspection-intensive assets, the team chose to significantly expand its use of the trusted solution. Ultimo impressed the PETROFER team with its user-friendliness and flexible configuration options.

The migration from On-Premise to the Cloud version was completed in 2024, within just four months. As part of its technical asset management process, PETROFER uses Ultimo for work order management covering plant and building assets, project management and the self-service portal. The system currently supports 16 full users in plant and maintenance management, and six mobile technicians who carry out inspections on the go via tablets. An additional 67 employees across other departments can report defects or order assets.

"The transition to Ultimo in the Cloud was structured and seamless. Close collaboration with the Ultimo team was highly professional and solution-oriented. Active change management and targeted employee training made the transition significantly easier."

Max Rösner

"Ultimo in the Cloud" Project Manager at PETROFER

Solutions & Results

Supported by Ultimo specialists, the internal PETROFER migration team utilized the Ultimo e-learning platform and its application management training courses. This approach ensured a smooth transition without operational interruptions.

- **Massive Efficiency Gains:**

Tablet-based inspections of approximately 200 shelving units now reduce the overall inspection time by 60% per each inspection cycle, while simultaneously improving the documentation quality. 4,850 assets are currently documented in the Ultimo Enterprise Asset Management (EAM) system, ranging from 500 m³ tank systems and agitators to mixing containers, pallet racks and even toilet seats.

- **Guaranteed Legal Compliance:**

Audit-proof documentation of monitored assets ensures full compliance with legal regulations. Automated job planning with adequate lead times helps meet statutory inspection deadlines and provides legally secure documentation for regulatory audits.

- **Operational Flexibility:**

The mobile tablet solution allows seamless transfer of inspection tasks between technicians, whether during emergencies or staff changes. Digital workflows replace verbal and paper-based communication, eliminating information loss and optimizing work orders prioritization.

- **Strategic Capacity Reallocation:**

By reorganizing workflows, operational inspections are now reassigned to qualified maintenance staff, allowing the asset management team to focus on strategic tasks such as asset expansion and system enhancements. Additionally, an average of 50 to 100 self-service work orders are registered per month which helps reduce the workload of the technical team

"What impresses me most about Ultimo is its ease of use. Even colleagues with minimal computer experience can use it effortlessly. As an application manager, I can also carry out configurations independently without relying on external consultants. This combination of user-friendliness and flexibility is truly unique to the Ultimo EAM platform."

"Thanks to the Ultimo Cloud platform, our data quality has reached a new level - centralized, secure, and always up-to-date. Ultimo enables mobile operations directly on site, paperless processes and reliable compliance documentation. The adaptive Cloud architecture reduces our infrastructure costs and delivers meaningful key performance indicators (KPIs) - a true driver of efficiency and compliance for our technical asset management."

Max Callegari

Head of Technical Division, PETROFER

The Future

The company plans to introduce automatic document creation for legally compliant inspection certificates at the push of a button and expand its use of the building management module in more details.

Integration of the electrical infrastructure into the system is also planned. In the long term, PETROFER aims to fully digitalize order processing across departments.

Another potential future enhancement is the introduction of EHS (Environmental, Health & Safety) management module. As part of its corporate strategy, PETROFER remains committed to an ongoing digitalization journey.

We look forward to continuing to support PETROFER's digital transformation and further expanding its asset management capabilities.