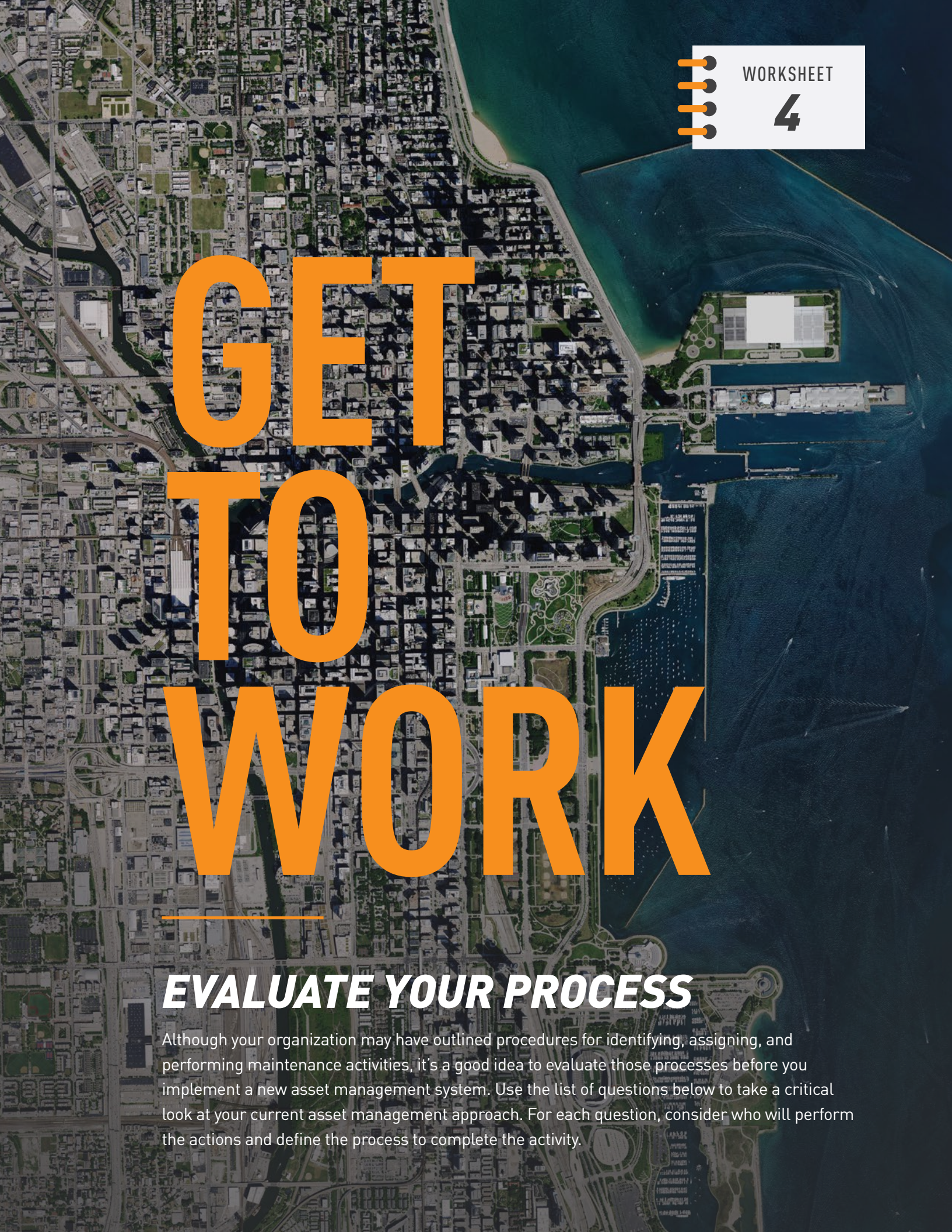

WORKSHEET
4

GET TO WORK

EVALUATE YOUR PROCESS

Although your organization may have outlined procedures for identifying, assigning, and performing maintenance activities, it's a good idea to evaluate those processes before you implement a new asset management system. Use the list of questions below to take a critical look at your current asset management approach. For each question, consider who will perform the actions and define the process to complete the activity.

EVALUATE YOUR PROCESS

WORKSHEET 4

WHO COLLECTS AND ENTERS THE INITIAL INVENTORY?

Who is responsible for developing the initial inventory through either data acquisition, entry, or conversion? E.g. dedicated internal resources, outside consultants, maintenance crews, summer interns.

WHO UPDATES ASSET RECORDS?

There may be multiple individuals responsible for keeping your information up to date. E.g. field professionals, admins, department heads.

HOW IS THE INFORMATION COLLECTED AND TRANSFERRED?

Are your current methods efficient? Or should you consider updating to mobile technology like iPads and smartphone apps? E.g. paper forms, email, online forms.

WHAT DATA IS ENTERED?

Determine the internal controls and procedures as to what information should be entered into the system. E.g. required information, level of detail required, supplemental details—if available.

EVALUATE YOUR PROCESS

WORKSHEET 4

HOW OFTEN SHOULD UPDATES OCCUR?

What does your standard process look like? E.g. as information is received, as activities are assigned, as activities are completed, daily, weekly, monthly.

HOW IS THE INFORMATION CHECKED FOR ACCURACY?

Validating data ensures accuracy and uncovers any potential problems or inconsistencies. E.g. system functionality, use of libraries/data lists, periodic database inspections.

WHAT ARE THE PROCEDURES FOR IDENTIFYING, ASSIGNING, PERFORMING, TRACKING, AND COMPLETING ACTIVITIES?

Look how your current asset and activity data to help. E.g. work orders, citizen complaints, emergency situations, planned activities.

HOW ARE EQUIPMENT AND MATERIALS TRACKED FOR EACH ACTIVITY?

Logging all your resources helps provide clear data on how much you're spending for routine and unexpected activities. E.g. itemized list of materials and equipment used, cost of materials used, equipment assignment, inventory control.

EVALUATE YOUR PROCESS

WORKSHEET 4

WHO NEEDS ACCESS TO THE SYSTEM DATA?

All individuals who rely on the collected information should have easy access, but it's important to determine security levels for each personnel type. After all, not everyone should have full record control. E.g. administrator, user, power user, internal request user.

WHAT TYPE OF INFORMATION DO THESE INDIVIDUALS NEED?

Some users may only need to see location or condition information, while others need to know work orders associated with specific assets. Determine the type of information that will need to be pulled from your asset management system. E.g. inventory data, scheduled maintenance activities, outstanding work activities, historical data, budgeting information, project cost, citizen contact info.

HOW WILL THE DATA BE ACCESSED?

Each user who requires data may need a different access method. E.g. workstations, across the network, printed reports, iPads, smartphones, online.

HOW SHOULD THE DATA BE FORMATTED?

Some users will require more information than simply access to the database. How will they access the required information? E.g. printed reports, graphs, exported data files, online.

EVALUATE YOUR PROCESS

WORKSHEET 4

HOW OFTEN IS THE DATA REQUIRED?

Some users need data on a regular basis, while others may only need it from time to time. E.g. on-demand, daily, weekly, monthly.

WHO WILL PULL DATA FROM SYSTEM?

These individuals must know what types of questions are being asked, so the data can be displayed in a manner that answers those questions. E.g. department heads, admins, data entry technicians, citizens.

WHO WILL MAINTAIN THE SYSTEM?

Real-time data is valuable and should be protected. A system admin should be appointed to maintain and back up your system, set up the security, define user permissions, and perform any updates. E.g. IT staff, admins, office manager.