

Inventory – What to document?



When you know better you do better

Maya Angelou



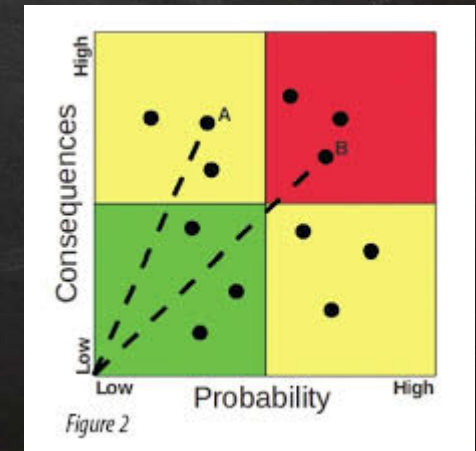
Work Order Entry - Work Order Activity Rules

Order Type: WM Maintenance Work Order

WO Type: 1 Maintenance Order

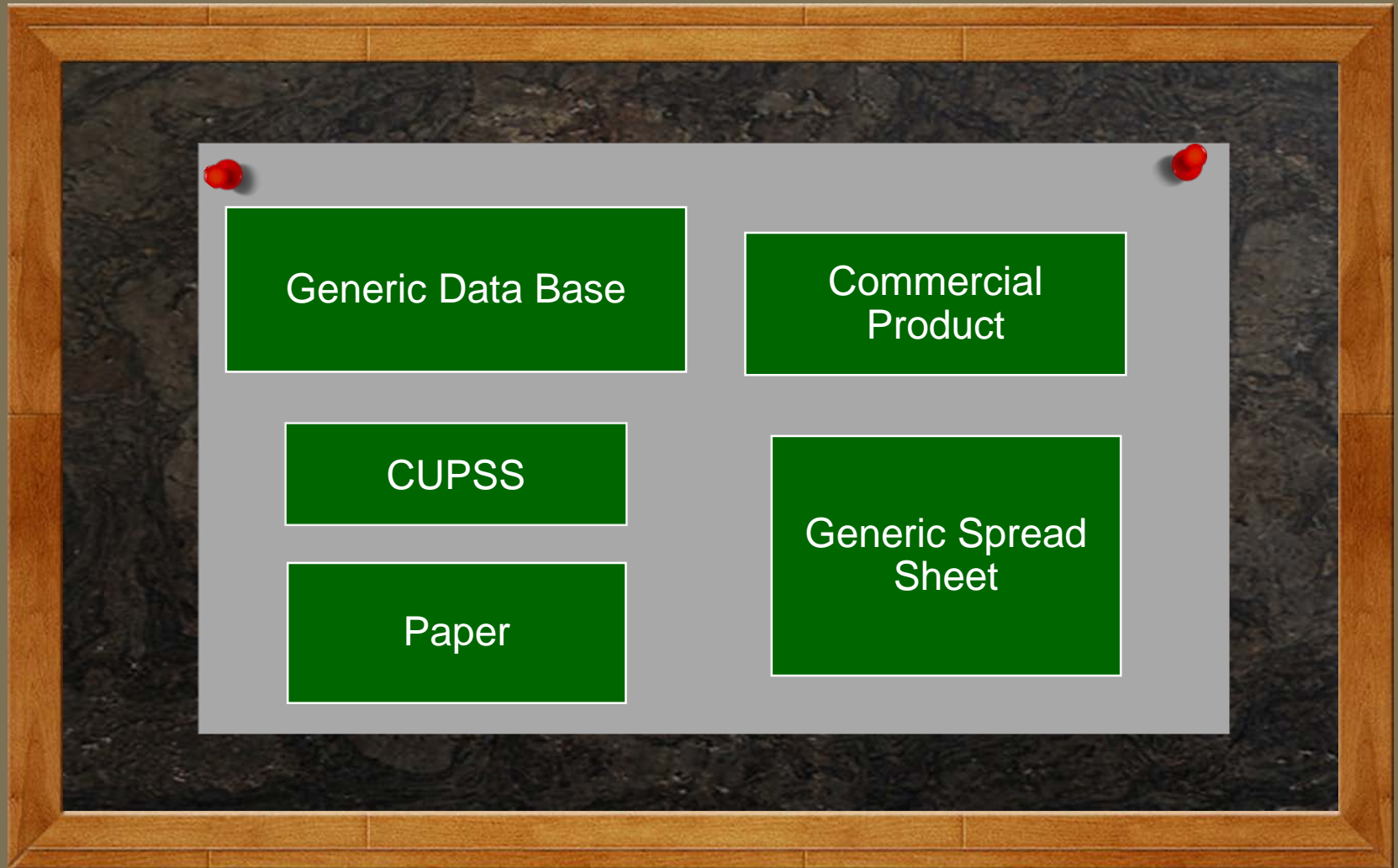
Records 1 - 10

WO Status	WO Status Description	Next Status	Allowed Status 1	Allowed Status 2	Allowed Status 3	Allowed Status 4	Allowed Status 5
M	Maintenance Work Request	M*	MA	MR			
M*	MWO Waiting Manager Approval	MA	ME	MG	MI	MR	
MA	MWO Approved	MB	MD	ME	MI	MM	
MB	MWO Material Issued	MG	MH	MJ	MM		
MC	W/O In Planning	ME	MF	MG	MI	MJ	MM
MD	W/O Plant Shutdown	ME	MF	MG	MI	MJ	MM
ME	W/O Waiting for Parts	MF	MG	MH	MJ	MM	
MF	W/O Parts Staged and Ready	MG	MH	MJ			
MG	W/O Ready to Schedule	MH	MJ				
MH	W/O Issued & Released	MJ					



WHAT ASSETS DO YOU WANT TO TRACK?

LOTS OF WAYS TO STORE DATA



GIVE ASSETS ID NUMBERS



Necessary for Success

What information should you track in your inventory?



ASSET SIZE

[illegible]

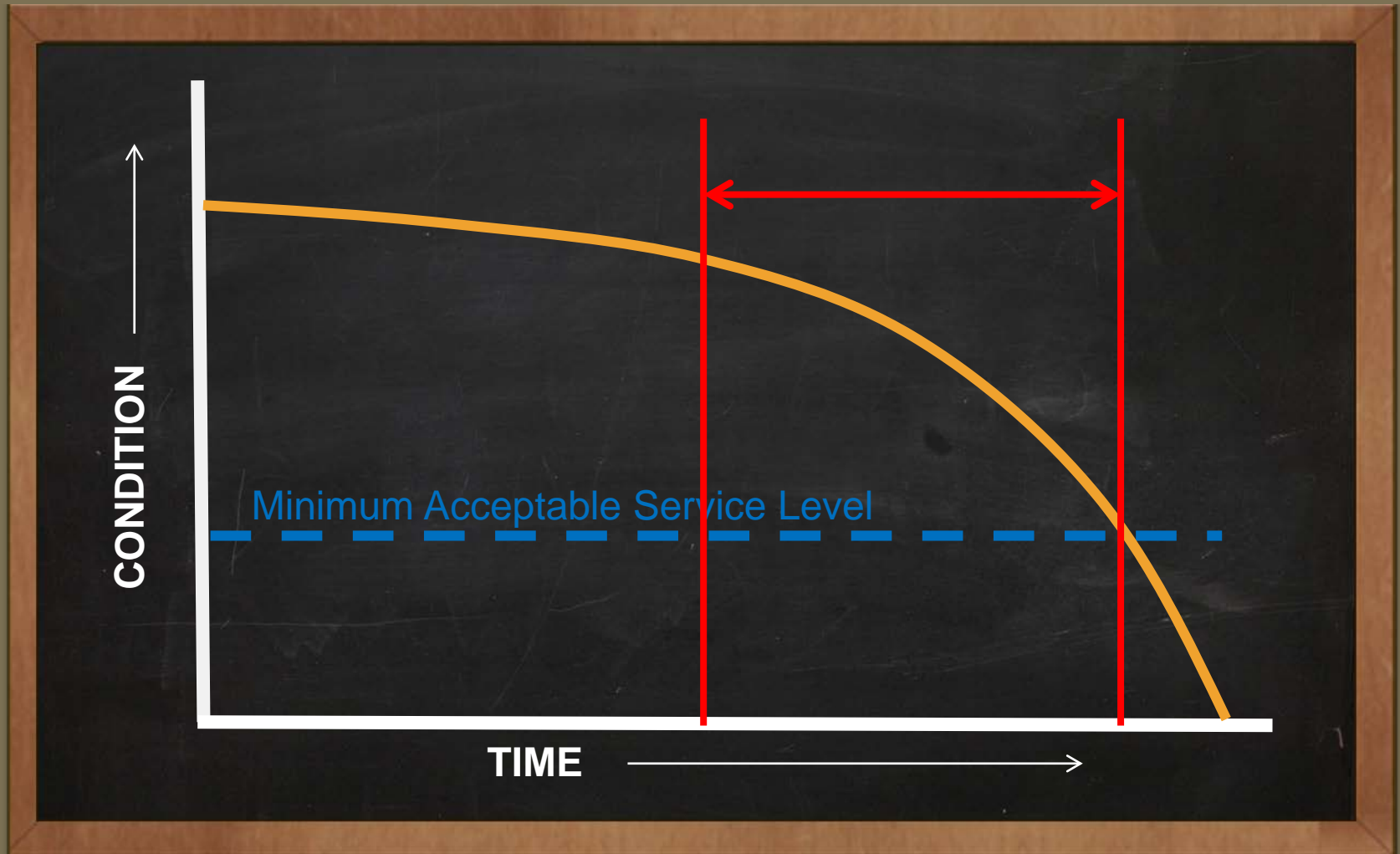
INSTALLATION DATE





**WHAT
CONDITION
ARE THEY
IN?**

WHAT IS THEIR REMAINING USEFUL LIFE?



WHAT IS THEIR REPLACEMENT VALUE?



Optional – Collect if Valuable

What information should you track in your inventory?

Is it valuable to your utility?

Model number

Supplier name
& phone

Under warranty

Warranty
expiration date

Manufacturer

Manufacturer's
recommended
O&M

Maintenance
records

Operational



Systems Maps

Interviews

System
Records

Existing
inventories
Numbering
Systems

Photographs

**START WITH THE
DATA YOU HAVE**

COLLECTING AND IDENTIFYING YOUR ASSETS

The screenshot shows a web-based asset management system. At the top left, the word "Assets" is circled in black. Below it is the "Asset List" section with an "Add Record" button. The "Main Data for Asset" section contains fields for Asset ID, Description, Building, Serial #, Manufacturer, Department, Asset Type, and Notes. The "Purchasing Information" section contains fields for Vendor, Acquisition Date, Rec. in Years, Account, Warranty #, Warranty Start Date, Warranty End Date, P.O. #, and Lease End Date. Three callout boxes are overlaid on the right side of the form: a maroon box with the text "Collect Only What You Will Use", a brown box with "Keep Information Updated", and a dark blue box with "Think About Quality".

Assets

Asset List

Add Record

Main Data for Asset

Asset ID: [assetid]

Description: [text input] Updated: [text input]

Building: [text input] Room: [text input]

Serial #: [text input]

Manufacturer: [text input]

Department: [text input]

Asset Type: [text input]

Notes: [text input]

Purchasing Information

Vendor: [text input] P.O. #: [text input]

Acquisition Date: [text input]

Rec. in Years: [text input]

Account: [text input]

Warranty #: [text input]

Warranty Start Date: [text input]

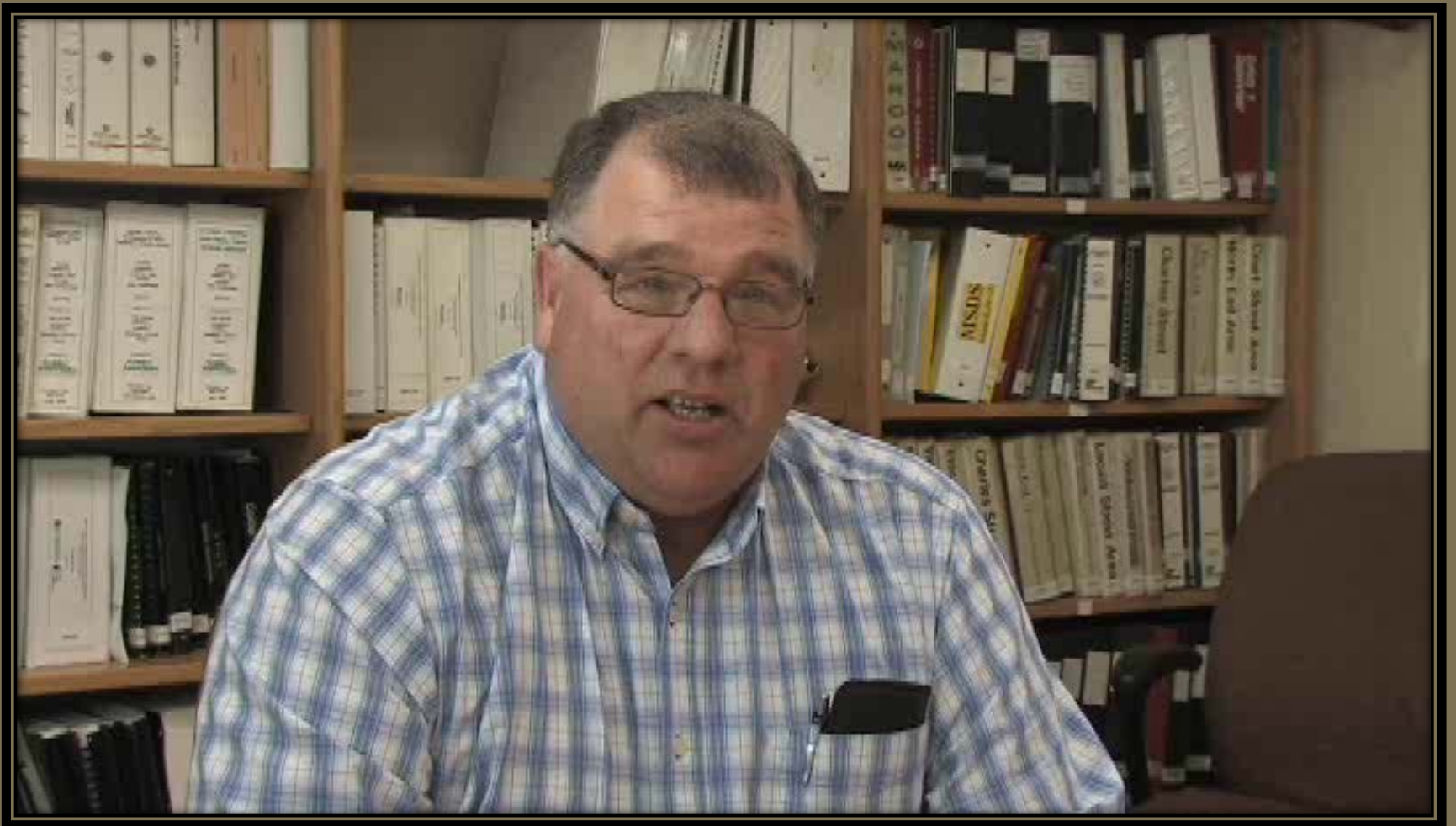
Warranty End Date: [text input] Lease End Date: [text input]

Collect Only What You Will Use

Keep Information Updated

Think About Quality

WHERE TO START YOUR INVENTORY



COLLECTING ASSET DATA



Tools Available

Reference Guide for Asset Management Inventory and Risk Analysis

Inventory	
Necessary Data	Optional Data
<ul style="list-style-type: none">• Asset size - diameter and/or flow rate• Asset location• Installation date• Condition - Visible inspection, then update as needed with Maintenance history, age• Useful life (varies with type, if unknown an estimate is 50 years)	<ul style="list-style-type: none">• Model number• Supplier name & phone• Under warranty• Warranty expiration date• Manufacturer• Manufacturer's recommended O&M• Maintenance records: last date hydrant was flushed or exercised• Operational• Color (if useful)• Were design specifications followed?• Asset use

Provides you with information on what you may want to include in your inventory and where you can look for such data

<http://southwestefc.unm.edu/asset-management/>

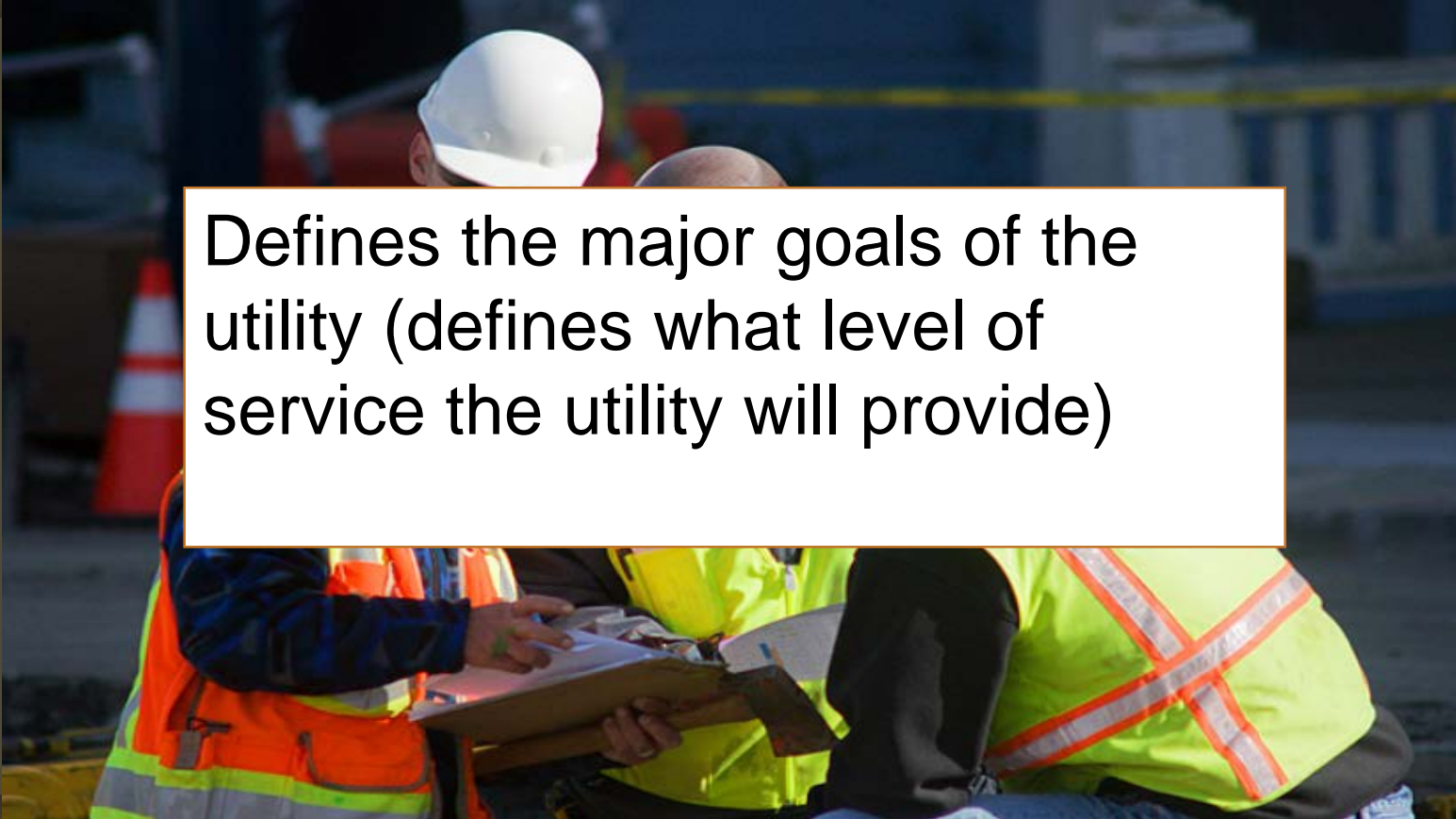
Level of Service – What to document?



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CUSTOMER SERVICE IN ASSET MANAGEMENT TERMS

A photograph of two construction workers wearing hard hats and high-visibility safety vests. They are looking down at a large clipboard or set of plans that one of them is holding. The background is slightly blurred, showing a construction site with orange traffic cones and blue barriers.

Defines the major goals of the utility (defines what level of service the utility will provide)

CALLED LEVEL OF SERVICE

Goals



1. _____

2. _____

3. _____

SETTING SMART GOALS



LoS Goals - Categories

Public Health
and Safety,

Customer
Service,

System
Maintenance,

Response
Time,

Water Loss
Control,

Drought and/or
Demand
Management,


System
Management

SMART Goals - Documentation

- What information is needed to measure if you are meeting the goal?
- How frequently should the information be collected?
- Results of measurement
- Determining if you are meeting the goal

Tools Available

Level of Service: Guidelines, Categories, and Example Goals



LEVEL OF SERVICE

Guidelines, Categories and Example Goals

Guidelines

The Level of Service Goals should define what your customers and employees can expect from the water utility. When customers understand what the utility is providing for them in terms of service and they are given a say in what the utility may provide in the future, they are more willing to pay. Customers need to understand that service is related to cost and typically the higher the level of service desired, the higher the costs associated with producing that level of service. Determining what the customer wants and is willing to pay for drives the decision making for the utility.

When defining your level of service goals, remember to write SMART goals – Specific, Measurable, Attainable, Realistic and Time Bound (when appropriate). This will allow the utility to track its performance, show successes and failures and revise for improvement each year. Goals can be changed or adjusted over time. Goals can also be added or removed from the list.

It's important to involve customers and staff in the process of establishing the goals or service levels. The goals can be either internal or external. External goals are those that directly impact the customers. Internal goals are those that are related to operations and that would not be easily understood by customers. Progress towards meeting the goals should be tracked and reported to upper management and the public.

Determining your Level of Service goals should not be overwhelming. Keep it simple; develop 10 – 12 goals around the most important aspects for your utility. The information below can be used as a resource in setting your utility's goals.

Categories

No matter where the water utility is located, customers desire roughly the same types of things from their utility – water that is safe and reliable, delivered at an adequate pressure, and that their concerns are addressed. Thankfully, this list is relatively small, allowing the utility to develop a targeted list of goals that address the major customer requirements. Level of Service Goals will typically fall into one of the following categories: Public Health and Safety, Customer Service, System Maintenance, Response Time, Water Loss

QUESTIONS

