Asset Management

simPRO Enterprise

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For many businesses, tracking and managing customers' plant and equipment is paramount to success. Tracking this equipment, or "Customer Assets" as referred in simPRO Enterprise, is vital for executing planned preventative maintenance and reporting on its defects and condition.

Configuration

simPRO Enterprise allows organizations to configure an unlimited number of different asset types. Each asset type they configure will then act as a template for how all such assets will behave.
When configuring asset types users can define the following:

Asset Category

Define the type of asset, as well as the basic behavior of default cost centers for jobs and quotes, which engineer or technician to use by default as a specialist for this type of equipment, and relevant standards references.

User defined fields

User defined fields or custom fields are fully searchable and viewable fields for the piece of equipment that will also print out on reports. A custom field can be a text field (no limit on characters), date field, predefined drop down list field or a barcode field. A barcode field is essentially a text field that allows users to print the contents of the field in a barcode format. Each field can also be marked as mandatory, so when field technicians are capturing new asset data they are required to capture certain fields of data.

Service Levels

An asset service level is a configured level or frequency of service. It can be defined in Days, Months or Years. Each service level can also be associated with a charge rate which is used when creating preventative maintenance jobs from the maintenance planner. This is used in order to work out what the default charge rate is for each type of asset being serviced at that particular level. This can also be overridden on a contract.

Failure points and Recommendations

Failure points are a checklist of tests that should be performed on a particular asset type at the defined service level. Evoking a particular failure point indicates the asset has failed its inspection at that point, while leaving it alone will indicate it has passed. Each failure point may be linked with a list of predefined options. If a technician identifies an asset test failure, they will be automatically prompted with options to rectify the problem. Each failure point and recommendation can also be linked with a Pre-build for rectification.

When failure points are identified the user has the option to create a quote using Prebuilds already linked to failure points and recommendations. This will automatically generate a quote, which can be checked and sent to the

customer, significantly reducing the time required to complete the reporting and quoting needed after a preventative maintenance visit.

Test readings

Specific test readings can be also be configured to be captured as tests are being carried out. A test reading can either be recorded as a free text field, a date field or a predefined list of options. It can also be marked as mandatory so it can't be skipped.

Attachments

Attachments on asset types are normally instruction manuals or technical specifications on a type of equipment.

Managing assets

When migrating across from different systems organizations will typically format their asset database on spreadsheets. This is a great opportunity to standardize the data that already exists on customer's assets. Once the cleanup and preparation is completed, assets can then be imported in bulk. Alternatively, a fresh site audit can be performed on all sites using simPRO Connect remote field application. It will produce an up-to-date database of all the equipment installed on your customer's sites.

Customer's assets are typically found on their sites. They can be anything from a fire extinguisher, a coffee machine or even a CAT dump truck. All of this equipment needs to be tracked and serviced, with maintenance being the grease that keeps the business wheels turning. On sites assets are typically arranged in a walk order. That is, when you arrive on site and walk around, it's the order you encounter the equipment.

Many organizations are now putting less emphasis on walk order, which requires constant maintenance, and are instead focusing on barcoding or serializing their assets. For example, when the technician is in front of the piece of equipment they can simply scan it and bring it up on their app to do the testing.

Users also have the option of printing a list of barcodes for the assets on site and linking with contracts, changing the service level dates on bulk, and transferring assets around. Transferring assets is great when doing swap outs, RA's, cyclical asset assignments, tracking customer movement with their assets, and being contracted to physically remove an asset.

A story we get told often is one where people are legitimately transferring assets, then losing them through using ineffective methods of administering. This can result in massive losses of time and money to an organisation. Drilling down and viewing an asset in more detail shows the full recorded history of everything that has ever occurred to that asset. The system will show the full test history such as what has happened, when it happened, what was the outcome, who did it, as well as the full transfer history. Users can also view and edit the details of the asset, the upcoming services and any attachments on the asset such as manuals or photos.

Customer assets can also be nested in with one another creating parent child relationships between assets. This is helpful if you want to view a master system (e.g. control or electrical system) and all the associated assets within it (e.g. control boards).

Physical asset maintenance

The maintenance planner tracks all service frequencies and levels required for assets, collating all the information to show users a list of every piece of equipment on every site, what needs to be serviced and at what service level.

This information can then be used to view all the preventative maintenance jobs required for the month with a single click, often resulting in hundreds or thousands of jobs. Those jobs are then either automatically assigned to technicians based on the asset, site and customer configuration, or they can be manually assigned or scheduled.

While on site assets can be managed from simPRO connect. This allows field technicians to view a list of all assets that need to be serviced and what service level needs to be performed. It then feeds down all the failure points configured in the asset builder when capturing their test readings. Users can also register new assets or edit the details of the existing ones.

Access to asset information

Reporting on asset activity is a very important aspect of asset maintenance. As simPRO comes preloaded with reports, both job specific and at a much higher level, you can report back to your customer on the outcome of test results, defect reports, defect rectification quotes etc. Users also have the option to run higher level reports such as, testing regime tracked against a contract's KPI's, testing efficiency averages and typical life spans of pieces of equipment.

Customers can also access basic information and reports on assets from the customer portal. If your organization grants access for your customers to use the portal they will be able to view the history and details of an asset as well as run their own defect and PPM reports. You are able to direct what your customers can and can't access within the customer portal.