Enterprise Asset Management – Mobility Readiness Checklist

Contents

1. What is the stage of the project – is the master data already in the EAM system or is master data entry the starting point?
2. If the master data is present in the EAM system check the quality of master data in the EAM system.
3. If the master data is not present in the EAM system what is the process to capture the master data accurately?
4. Do Equipment and Locations have all the required information in the EAM system? Ex: GPS, Addresses, Characteristics, Classes, etc.
5. How shall the master data updates be done periodically to keep them up to date?
6. If GPS co-ordinates are required for Equipment and Location how will the GPS co-ordinates be captured and updated in the EAM system?
7. Do the Equipment and Locations have associated documents like Operating Procedures, Drawings, Pictures, etc.? Where are these stored and how are they associated with the Equipment and Locations in the EAM system? How does this align with the document management strategy?

Sl. No.	Item	Sub-Item	Status
1	Equipment / Locations	General Information	
		Linear vs. Non-Linear Assets	
		Addresses	
		Characteristics	
		Classes	
		Code Groups and Codes	
		Measuring Points	
		GPS Co-Ordinates	
		Updates from the field	
		Documents (See Document Strategy)	

1. Who is the business process owner?
2. What processes and supporting data are required to be accessed from the mobile devices?
3. What are the different roles/profiles for users on the mobile devices?
4. Is the business process flow completely defined in the EAM system?
5. Does the business process flow need alterations in the EAM system to adapt to mobile device usage?
6. Is mobility aimed to increase the usage of the EAM system or to improve productivity or both?
7. Do the business processes need to be executed on the mobile device in an offline mode in areas without connectivity?

Sl. No.	Item	Sub-Item	Status
1	**Master Data Management**	Creating Equipment & Locations	
		Updating Equipment & Locations – Direct Update vs. 2-level check update via Notifications	
		Associating Documents – Pictures, Standard Operating Procedures, Compliance Documents	
2	**Preventive & Breakdown Maintenance**	Notification Based or Order Based Process or Both	
		Reporting Notifications	
		Order Assignment to Technicians	
		Order Level vs Operation Level Assignment to Technicians	
		Maintenance History for the Technical Objects	
		Object Lists Usage	
		User Status management	

BUSINESS PROCESSES

Sl. No.	Item	Sub-Item	Status
2	**Preventive & Breakdown Maintenance** (contd.)	Time Recording – in SAP PM or outside	
		Materials Availability, Reservation & Consumption	
		Service Management	
		Notification Items - Capturing Object Parts, Damages and Causes	
		Notifications Tasks & Activities	
		Informing Customers about Finished Work	
		Documents (See Document Strategy)	
3	**Inspections & Audits**	Inspection Rounds	
		Record Measurements / Readings for Equipment / location, Historical Readings	
		Record Status	
		Capture Pictures, Access Documents (See Document Strategy)	
4	**Shift Notes**	Capturing Notes during the Shift	
		Centralized Stock (Warehouse) & Decentralized Stock (Van Stock)	
5	**Inventory**	Handling Material Issues	
		Handling Material Returns	
		Centralized Stock (Warehouse) & Decentralized Stock (Van Stock)	

Sl. No.	Item	Sub-Item	Status
6	**Miscellaneous**	Identity Process Owner	
		Personas (User profile) and Process Flow for Each Persona. Ex: Supervisor Process, Technician Process, etc.	
		External Contractors vs. Internal Employees	
		Process on Mobile vs. Process in SAP	
		Global vs. Local Templates: One Process Flow for all Global Locations or Different Process Flows for each Location. Supporting Multiple Process Flows in the same SAP systems and Mobile Application	
		Online vs. Offline Processes	
		Barcoding / RFID / Beacon Reading	

1. What are the different kinds of reports required by the management, plant managers, maintenance managers and other people in the organization?
2. What proactive reports (where the users need to get information pushed to them periodically) and on-demand reports (information available when users demand) required by the organization?

Sl. No.	Item	Sub-Item	Status
1	Maintenance	Current Work Order / Job Status Report – Status based on dates, priorities, work centers, plants	
		Trends Report – Order trends based on priorities, maintenance types, defect types, locations, equipment type, etc.	
		Spending Report – Spending based on plant, work center, location, equipment type, labor cost and material cost	
		Top 10s – Top 10 spends, top 10 visits, top 10 defects, top 10 causes, top 10 parts consumed, top 10 most time consuming job types for different periods	
		Cumulative Costs – Planned vs. Actual Spending in Maintenance	
2	Inspections	Out of Range Reports for inspection values, GPS locations	
		No. of problems reported during inspections during different periods	
		Audit failure frequency and reasons	

1. Is there a document management system in place for company wide usage?
2. Is maintenance using the document management system that is in place?
3. If there is no document management system in place then define the process for selecting the document management system.
4. What documents are required on the mobile devices?
5. Are there suitable applications on the mobile devices that can open the required documents?

Sl. No.	Item	Sub-Item	Status
1	**Documents**	Standard Operating Procedures	
		Compliance / Audit Documents	
		Pictures	
		Signatures	
		Drawings	
		In SAP or outside SAP	
		Document Management System Selection	
		Access Control	
		Finalization of Compliance Documents, Pictures and Signatures after Order Closure	

SYSTEMS & LANDSCAPE

1. What are the different software systems involved in the mobile business processes?
2. Do the external software systems have interfaces to allow 3rd party integration?
3. Create a software system landscape map so that everybody is clear about the systems and process integrations.
4. Identify the leading and trailing systems.

Sl. No.	Item	Sub-Item	Status
1	**Systems**	Leading and Trailing Process Systems	
		Process flow and integration across Systems	

MOBILE STRATEGY

1. Define the larger mobile strategy.
2. Start with a Proof of Concept for apps.
3. Identify the mobility owner – team or person who will be in charge of mobile strategy.

Sl. No.	Item	Sub-Item	Status
1	**Mobility Champion**	Mobility Owner / Champion Selection – Team or One Person	
		Do the required processes fit in one app or should they be segregated into multiple apps?	
		Can the process be simplified in the mobile app for easy use?	
2	**Mobile Device**	Mobile Device Selection	
		BYOD vs. Corporate Devices	
		Single Device (e.g. iPad only) Vs. Multiple Devices (iPad, Android, etc.)	
		Dedicated Device Per Technician vs. Shared Devices among Technicians	
		Mobile Device and Application Management (MDM and MAM)	
		Provisioning	
		Tracking Devices	
		Access Control	
		Device Recovery	
		Anti-Theft and Loss Protection	
		Upgrades – Mobile Operating System and Apps	
3	**Connectivity**	Internet / Intranet Connectivity	
4	**Business Process / Apps**	Processes Required on Mobile	

SECURITY

1. Define the software and data security policy for the organization.
2. Apply the security policy across all layers.
3. Identify both internal and external vulnerabilities that can be caused due to mobility.
4. Define actions / remedies to overcome the identified security vulnerabilities.

Sl. No.	Item	Sub-Item	Status
1	**Authorizations**	Authorization & Access Control	
		SAP Authorizations	
		Mobile Process Authorizations	
2	**Mobile App**	Mobile App and Data Security – In the device, over the wire, etc.	

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Sl. No.	Item	Sub-Item	Status
1	**Users**	Involvement of Users via Partnerships	
		Communicating Changes to Users	

TESTING

1. Define a robust testing process to test mobile apps.
2. Involve app end users in the testing process.
3. Communicate changes in the apps clearly to the end users.

Sl. No.	Item	Sub-Item	Status
1	**Users**	Involvement of Users via Partnerships	
		Communicating Changes to Users	

1. Define a training program that caters to all the people involved in mobility – management, managers, end users and support personnel.
2. Do not make assumptions of proficiency of end users in using the mobile devices. Some of them might need basic training too.
3. Remember that the mobile applications should improve productivity of end users and should not become a bottleneck.

Sl. No.	Item	Sub-Item	Status
1	User Training	Identify Training Needs	
		Create Training Program	
		Deliver Training Program	
		Communicating Changes to Users	
		Cheat Cards for Users – Create small training cards that users can refer to quickly.	

1. Define a detailed go-live plan.
2. Use a phased go-live approach.
3. Identify potential bottlenecks and possible solutions.
4. Build confidence among users in both the applications and the support process.
5. Do not add features during go-live. There is always a next phase!

Sl. No.	Item	Sub-Item	Status
1	**Plan**	Phased go-live	
		Support Model during Go-Live	

SUPPORT & SUSTAINABILITY

1. Clearly define and communicate the support model.
2. Make it easy for users to raise support requests.
3. Handhold users during the go-live and build confidence.
4. Identify super users who can help their peers – this is the key to sustainability.

Sl. No.	Item	Sub-Item	Status
1	**Model**	What is the Support model?	
		Issue Reporting & Resolution	
		Who is responsible for internal support and answering users' questions?	
		Troubleshooting & Monitoring	

VENDOR / MOBILE SOLUTION SELECTION

1. Define vendor selection criteria.
2. Always talk to at least 2 vendors before deciding.

Sl. No.	Item	Sub-Item	Status
1	**Vendor**	Identify vendor selection criteria	
		Check responsiveness, cost, solution quality, technical & business capability and support structure?	
2	**Mobile Solution**	Standard app vs. custom app	
		Technical solution / platform selection criteria	

1. Continuous improvement is not an option. It is a reality in mobility and business.
2. Mobility is changing rapidly. Define processes to enhance and adapt to changes in the mobility world.
3. Consider updating the application at least once a year. But avoid frequent updates that disrupt the users.
4. If updates are very different from older versions of the apps then relook at the training program and use an effective communication strategy.

Sl. No.	Item	Sub-Item	Status
1	**Business Process**	Process for enhancements	
2	**Mobile App**	Process for enhancements	

Sl. No.	Item	Sub-Item	Status
1	**Owners & Users**	Identify Process Owners	
		Identify Mobility Champions – Person or Team	
		Identify Super Users for Mobile Apps	
		Involve Super Users from Process Definition to Go-live and in Continuous Improvement	

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