

Six Steps to Successfully Implement **Physical Asset Management** in your City

—
A guide to get you started using SimpleCity



SimpleCity Physical Asset Management

Introduction

Congratulations, you've implemented a Physical Asset Management System! Now that you've made the investment, how do you make the most of your Asset Management System so you can take full advantage of the value and benefits for your city?

This eBook is a guide of steps you should take to make sure your Asset Management System is successful. Implementing Physical Asset Management can be overwhelming. If you break it down and focus on completing one element at a time, it becomes much more manageable. Each chapter will give you practical advice and some tips and tricks on how to get the most of this software. At the end, you'll have some action items you can do to get started today.

We designed SimpleCity to empower municipal government to make data-led decisions and protect your community. We are committed to your success, and this eBook is just one of many tools available to help you make the most of your investment! For more assistance, please review the Tutorials available under the Help Menu or contact your Client Success Manager.

Janelle Heuton

Executive Vice President of
Client Success
janelle@gworks.com

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Chapter 1:

Configure the Platform

While most city utilities and public works share similarities in their form and function, each one has unique needs. We have developed and Administrative Page for you to manage and configure the things that matter to you. This gives you the power to make adjustments so that SimpleCity is optimized to meet the specific needs of your city.

Suggested Workflow

Use the Admin Interface to set up users and permissions, see activity and data usage stats, and configure Activity Management notifications. You can also manage data, manage departments, and more.

1

Open the Configuration Page. Update the email notifications so you and your team are informed with Activity Updates only when you need or want to be.

2

On the Configuration Page, create Custom Activity Types for anything specific you want to track for your city. These will appear in the "Activity Type" dropdown menu when adding a new activity.

3

On the General Page, update the banner with your city's logo or special image to give your site a personal touch.

4

On the Manage Data Tab, choose which layers are visible to each role and related department.

5

On the Manage Users page, create custom roles and assign access to only those tools and information that person or group needs access to.



Pro Tip: Make sure to take advantage of the Projects Tab in the Activity Management Tool to create and manage projects within your city. You can associate all activities with a project to track work and costs associated with that project.

Department Name	Displayed As	Shared With
Public	Public	3 Users
Management	Management	28 Users
Water	Water	7 Users
Storm	Storm	3 Users
Planning & Zoning	Planning & Zoning	2 Users
Sanitary	Sanitary	2 Users
Electric	Electric	2 Users
Cemetery	Cemetery	4 Users
Test	Test	0 Users
Citizen Request	Citizen Request	0 Users
Trees	Tree Department	0 Users
Street	Street	0 Users

Layer Name	Is Visible?	Is Editable?
Select/Unselect All	<input type="checkbox"/>	<input type="checkbox"/>
Zoning - City Zoning	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Storm - Inlets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Storm - Storm Manholes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Storm - Storm Water Mains	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Water - Wells	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Summary

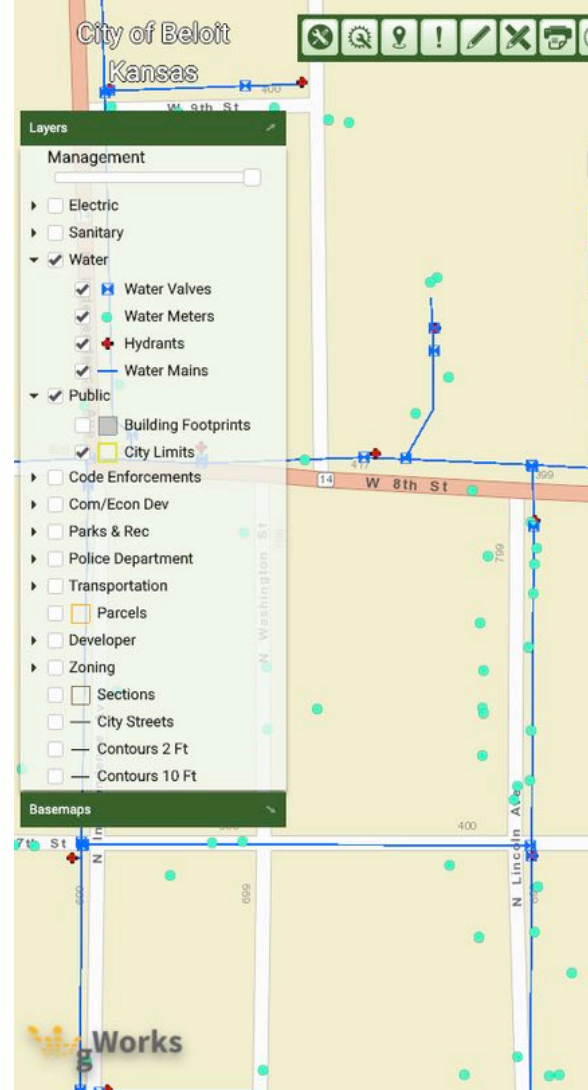
You have the power to configure SimpleCity settings to match your needs. Hire a temporary summer intern who should have limited access? Use the Admin Interface to set the intern up as a user and determine exactly what data and tools they will have access to. Want to track nuisances or animal control calls? Create a custom activity type. Getting too many Activity email notifications? Update the settings in the AMT Configuration page.

These tools also let SimpleCity grow with you, whether you're a town of 500 people with two departments and three users, a City of 10,000 with over ten departments and dozens of users, or somewhere in between.

Chapter 2: Inventory

Your Asset Management is only as good as the data you record so you can access what you need, whenever you need it. Documentation is critical to help mitigate risk!

Make sure you have a complete inventory of all your assets. That includes making sure you have the correct location and all the right details for your assets. Tracking things like manufacturer, serial number, installation date, condition, and replacement costs will ensure you have all the information you need to perform preventive maintenance and make decisions.



An inventory should contain at least the following information:



Asset Name



Location



As-built
Documentation



Condition
Rating



Installment
Date/Date of Service



Useful Life



Original Value



Replacement
Cost/Net Book
Value



Maintenance
History



Photos

Suggested Workflow

Utilize the Identify & Editor Tools to review what you have and add additional details. We recommend starting with one department at a time and doing a completed audit of all your assets, adding anything pertinent that is missing.

1

Open the Editor Tool

2

Select the Layer you wish to edit

3

Select an asset on the map

4

Add in all known information for that asset. Remember, you can run reports on any information included here.

5

Identify the asset and use the Upload Media Tool to upload a photo.

Pro-Tip: You can use the Editor Tool to add or move assets! If your asset inventory is not complete, first add in the missing assets and then add the attribute details.

The screenshot displays the SimpleCity Demo software interface. On the left, an 'Editor' panel shows 'Select Layer: Manholes' and 'Advanced Options' including 'Layer Audit Log' and 'All Audit Log'. The main area is a map of Nebraska with street names like W 3rd St, Grand St, 5th St, and E 5th St. A 'Details' panel on the right shows fields for 'Manholes' such as Asset Type, Latitude (X), Longitude (Y), Nearest Address, Road, Crossroad, Replacement Cost, Date Installed, Elevation, Lid Type, Material, Condition, and Outlet Size. A 'Report Builder' search bar is also visible.

Summary

Having a complete, up-to-date asset inventory ensures the information is there when you need it. There have been 43 major hydrant recalls since 1999, but half of those have never been inspected or repaired. If your data is up to date, you'll know exactly where all the hydrants are that need to be replaced in the event of a recall. Or when that pipe bursts, you'll have access to the most current data so you can respond quickly and efficiently to minimize disruptions.

We've seen cities get insurance claims or FEMA funds requests denied because they have no real records of the assets that got destroyed. Tracking location, age, and maintenance history will not only help risk prevention, but also it will create a record that insurance companies need to pay out claims. It is critical to have a complete inventory of your assets. This includes what you have, where it's located, and details about each item. Learn more about tracking maintenance in the next chapter.

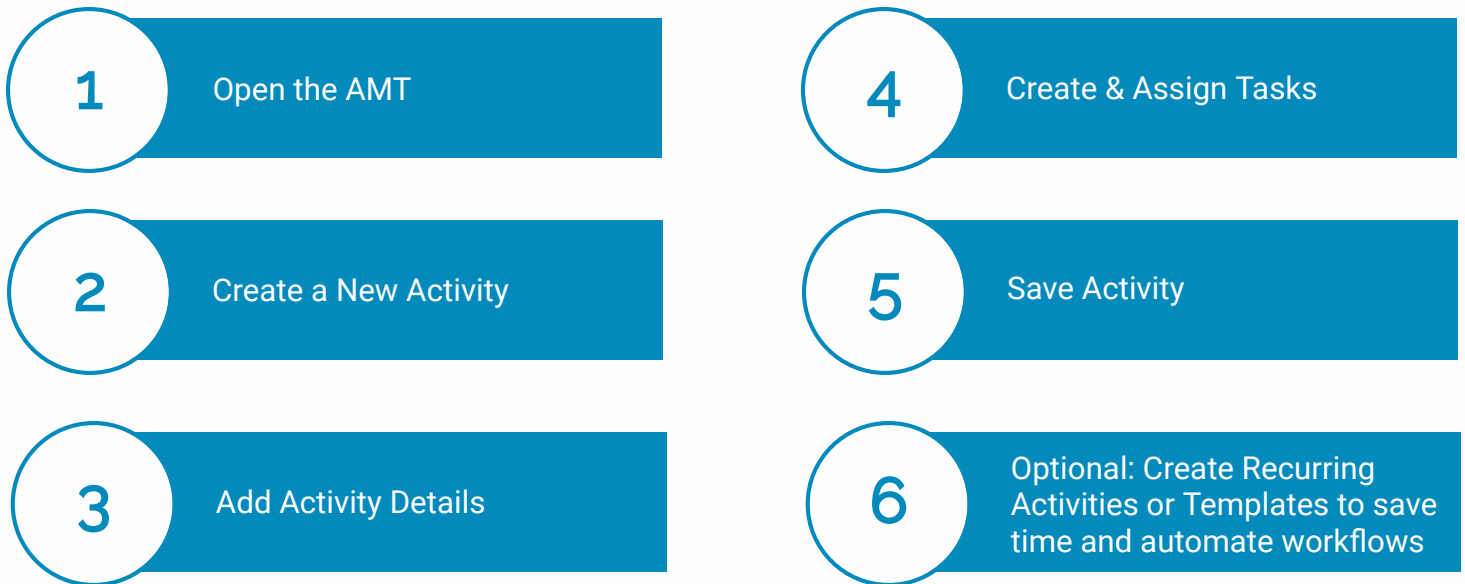
Chapter 3:

Logging Maintenance Activities

Now that you've got an accurate inventory of all your assets, you'll want to keep an active log on all the work done to keep those assets in working order. Practicing and recording planned, preventative maintenance will decrease the amount of unplanned work and surprises that your city may encounter.

Suggested Workflow

Use the Activity Management Tool ("AMT") to create and assign activities. Take advantage of additional options like activity templates, scheduling recurring activities, and Quick Reports.



Pro Tip: You don't have to open the AMT to create a new activity. Save yourself a step by clicking on that asset on the map and then select "Create Activity" from the Details Menu. The Activity that you create will already be associated with that asset. You can always change or add additional assets to be associated with that Activity.

Status	Project Name	Start Date	Due Date	Activity #	Activity Type	Assigned To
Overdue		08/22/2018	08/24/2018	1040	Citizen Report	SimpleCityDemo2
Active	Hazard Material Cleanup	09/11/2018		1050	Preventative Maintenance	SimpleCityDemo
Active	Hazard Material Cleanup	09/11/2018		1051	Installation	SimpleCityDemo
Overdue	Hazard Material Cleanup	09/20/2018	09/29/2018	1055	Installation	Unassigned
Active		10/01/2018		1066	Preventative Maintenance	Unassigned
Overdue		09/26/2018	09/28/2018	1072	Inspection	Multiple
Active		10/18/2018		1075	Preventative Maintenance	SimpleCityDemo
Overdue		10/18/2018	10/19/2018	1076	Preventative Maintenance	SimpleCityDemo
Overdue		10/18/2018	10/20/2018	1077	Preventative Maintenance	ttillman

Now that you're tracking activities, use the AMT to plan your day. Each user can view all work assigned to them and sort by due date. Quickly see unassigned activities or sort by Project to make the most of your time.

SimpleCity@ Demo
Nebraska

Layers
Basemap

Report Builder Search Address, Owner, OwnerExact, PID, STR, GIS Layer:

Log Out Help About Admin Page

Sec: 31
Town: 12
Rng: 9E

Sec: 32
Town: 12
Rng: 9E

Activity Management

Details History Assets/Location Costs

Activity # 1376 Date Created 06/18/2020 03:08 PM

Activity Type Inspection Start Date 06/18/2020 Due Date 06/30/2020

Project Project 2020

Select Assets Select Location Attach Files

To Do List

Department	Assignee	Task Details	Field Comments	Complete	Costs
Water	Tom Fletchall	routine inspection		<input type="checkbox"/>	+

+ Add Task

Comment

Back To List

Save Delete Template Clone Recurring Print

Summary

We know valve exercising is important. But do you have a program in place to ensure reliability in the event of an emergency? Using a Physical Asset Management system can help you stay on top of proactive maintenance.

Get better organized by knowing what you have to do and when it has to be done by. Increase efficiency by having a detailed plan of what you're doing, when it's happening, and where you'll be working on a daily and weekly basis. Save time through Recurring Activities so those valve flushes always get scheduled exactly when they need to.

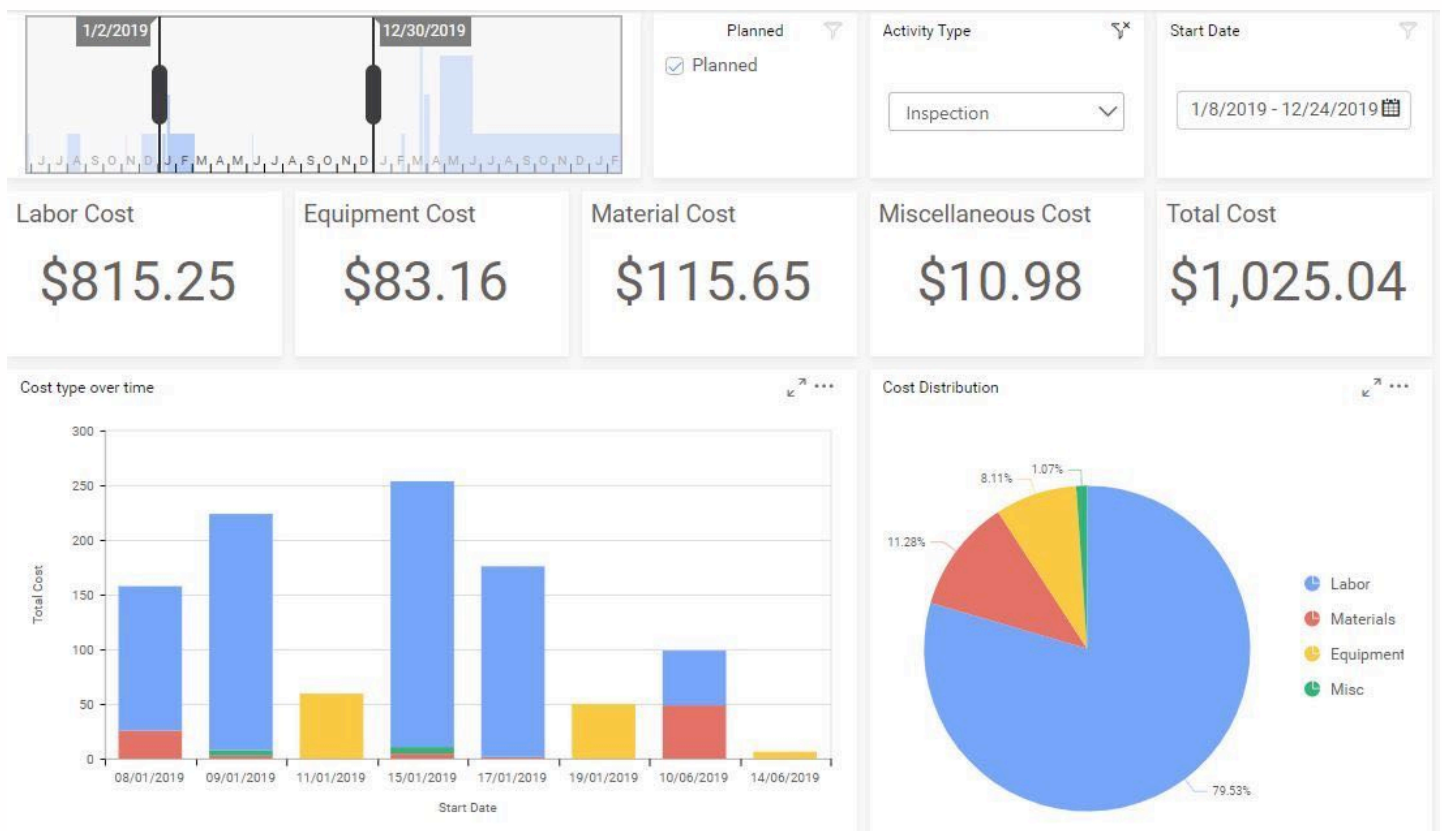
Make sure you're doing everything you can to prevent unplanned work, ensure your insurance claims get processed and paid if and when you need them, and plan for the future. Make informed decisions based on what is being done and where in your city. Use the available Quick Reports for a snapshot of your activity details, or use the Report Builder for more detailed reports. Learn more about the Report Builder in the next chapter.

Chapter 4:

Analytics & Reports for Data-Driven Decision Making

You've been tracking activities. Now you can use the details you've been tracking to make decisions based on data rather than assumptions. Look at frequent issues to determine assets that might need to be replaced and to identify patterns. What needs to be replaced due to useful life or condition rating? What does your five-year Capital Improvement Plan look like? Use Reports generated through SimpleCity for valuable insight and improved decision-making.

Reports will help your city improve planning & budgeting and provide situational awareness of your city's assets. Make good decisions and ensure things are getting done properly & efficiently.



Suggested Workflow

Quick Reports within the Activity Management Tool give you a snapshot into who is doing what and where. The Report Builder lets you configure and save customize reports to get exactly what you need.

1

View available Quick Reports in the AMT.

2

Sort & Filter by Department & Time Range.

3

Open Report Builder. Create a New Report or View Existing Report.

4

Choose a Source from all available Assets, Activities, or Audit Log data.

5

Choose the columns you want to include in your final report.

6

Select Filters to look for specific criteria.

7

Save and Export the Report.

The image displays three screenshots of the Activity Management Tool (AMT) interface, illustrating the suggested workflow steps:

- Step 1:** The main AMT dashboard showing a search bar, date range (05/23/2020 - 06/22/2020), and a table of activities. A dropdown menu is open, showing options like 'Tasks per Employee', 'History by Asset', and 'History by Activity Type'. A blue callout '1' points to the dropdown.
- Step 2:** The same dashboard with a blue callout '2' pointing to the date range filter.
- Step 3:** The 'Report Builder' window is open, showing a 'Saved Reports' section and a 'Create New Report' button. A dropdown menu is open, listing sources like 'American Darling hydrants', 'American Darling hydrants 05 to 11', and 'Assets'. A blue callout '3' points to the 'Create New Report' button.
- Step 4:** The 'Report Builder' window showing a list of sources to choose from.
- Step 5:** The 'Report Builder' window showing the '3. Optional: Add Filters' section. A blue callout '5' points to the 'Select Attribute' dropdown.
- Step 6:** The 'Report Builder' window showing the filter configuration. A blue callout '6' points to the 'Select Operation' dropdown.
- Step 7:** The 'Report Builder' window showing the filter configuration. A blue callout '7' points to the 'Enter Filter Text' input field.

Pro Tip: If you include the Global ID as a column, you'll be able to click that link to select and highlight each specific asset included in that report on the map.

Summary

You've spent time ensuring all your asset data is complete, and you've been logging all the various activities that are performed. Reports let you make use of that valuable data. Use reporting for compliance, budgetary planning, and risk management. The data you are able to extract and analyze will help you determine the lowest cost options for providing the highest desired level of service over a period of time. You can also use it to assess criticality and understand your level of risk exposure across assets and departments. Being able to report on this information will help you prioritize planning and projects.

Reports are also useful on a daily basis. Wouldn't it be nice to be able to show the City Council exactly what you've been doing and what assets have been maintained through a simple report? Or easily get a list of all those fire hydrants in the event of a recall?

Chapter 5:

Job Costing

Tracking costs associated with maintenance activities is an important component of physical asset management. Use Job Costing data for proper planning & budgeting. SimpleCity allows you to itemize and associate costs for labor, equipment, and materials for every task within every activity. This is optional, but something we strongly recommend to get the most out of your data. And some entities, like FEMA, may require that level of detail if you have to report a disaster.

Suggested Workflow

Use the Job Costing options in the Activity Management Tool to track labor, equipment, materials, and miscellaneous items. Add the relevant items and costs are calculated automatically.

1

Use the Job Costing button within an Activity to add labor hours.

2

Add Equipment & Duration.

3

Add Materials & Quantity.

4

Add Miscellaneous Items.

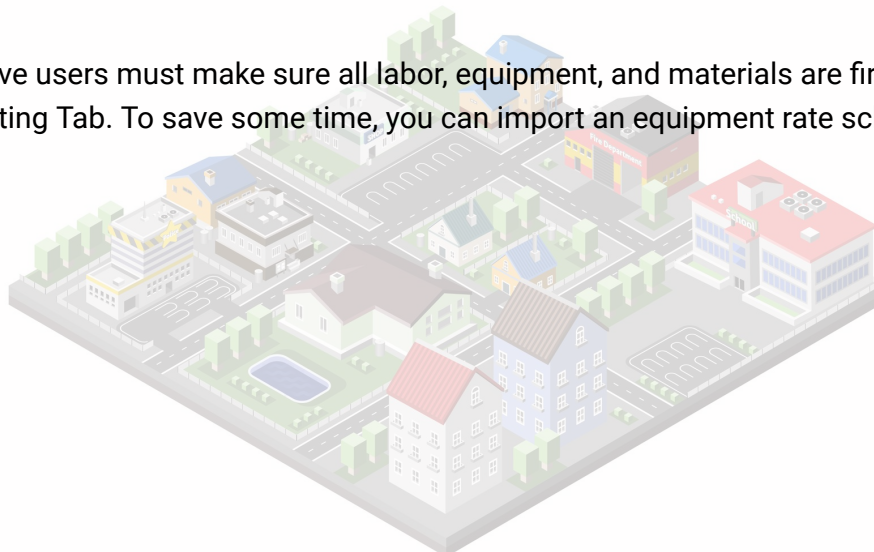
5

View Costs by Activity or Project within the AMT.

6

View Admin Dashboards for more detailed Reporting.

Pro Tip: Administrative users must make sure all labor, equipment, and materials are first added through the Admin Page on the Job Costing Tab. To save some time, you can import an equipment rate schedule directly from FEMA or for your state.



Activity Management

To Do List

Department: Management (2)

Assignee: SimpleCityDemo2

Task Details: []

Field Comments: [] (1)

Labor: Employee: Janelle Heuton (3), Time: 2:00, Overtime: 0:30
 Equipment: Type: 8770 - Welder, Portable (4), Time Used: 1:30
 Materials: Material: 0002 - Surface sealant (5), Quantity: 2.50
 Miscellaneous: Item: Postage, Quantity: 1.00, Item Cost: \$1.50

Add Labor
 Add Equipment
 Add Material
 Add Miscellaneous

Back To List << 1040 (1/242) >> Save Delete Template Clone Recurring Print

Activity Management

Project Details | Project Costs (6) | Project History

Project Name: Sidewalk Repair - 1st & Main St

Project Start Date: 01/08/2020

Project Owner: Quinton Randel

Activities

Status	Start Date	Due Date	Activity #
Scheduled	07/01/2020	08/01/2020	1040
Complete	01/09/2019	01/10/2019	1119

Back To Projects List

Project Name: Sidewalk Repair - 1st & Main St
 Project Owner: Quinton Randel
 Project Status: Complete

Labor Cost	Equipment Cost	Material Cost	Misc. Cost	Total Cost
\$1,085.75	\$1,557.65	\$523.95	\$1.50	\$3,168.85

Labor Costs

Activity #	Employee	Hours	Rate	Cost
1040	Janelle Heuton	2:00	\$25.00	\$50.00
1040	Janelle Heuton - Overtime	0:30	\$42.00	\$21.00
1119	Quinton Randel	6:00	\$24.00	\$144.00
1120	Quinton Randel	24:00	\$24.00	\$576.00
1120	Quinton Randel - Overtime	6:00	\$36.00	\$216.00
1303	SimpleCityDemo	2:30	\$15.83	\$39.56
1303	SimpleCityDemo - Overtime	2:30	\$15.68	\$39.19
		Total Hours:	43:30	Total Cost: \$1,085.75

Equipment Costs

Activity #	Equipment	Hours	Rate	Cost
1119	8209 - Loader - Wheel	4:00	\$97.00	\$388.00
1119	8750 - Vehicle, Small	6:00	\$6.40	\$38.40
1119	8150 - Broom, Pavement	2:00	\$24.50	\$49.00
1120	8750 - Vehicle, Small	30:00	\$6.40	\$192.00
1120	8391 - Loader, Wheel	24:00	\$36.90	\$885.60
1040	8770 - Welder, Portable	1:30	\$3.10	\$4.65
				Total Cost: \$1,557.65

Material Costs

Activity #	Material	Quantity	Rate	Cost
1120	0010 - Concrete	45.00	\$4.99	\$224.55
1120	0002 - Surface sealant	5.00	\$2.49	\$12.45
1120	0003 - Reflective paint	7.00	\$2.99	\$20.93
1120	0004 - Sand	36.00	\$5.95	\$214.20
1120	0005 - Brick	4.00	\$6.25	\$25.00
1303	0010 - Concrete	2.00	\$6.05	\$12.10
1040	0002 - Surface sealant	2.50	\$5.89	\$14.72
				Total Cost: \$523.95

Summary

If you have a disaster and submit a claim to your state or FEMA, chances are you'll need to provide a detailed and itemized lists of all costs associated with that event. But tracking Job Costs is useful on a daily basis as well. If you're using Job Costing, this is available with a couple clicks.

Tracking value and replacements costs associated with your assets is just one piece of the puzzle. Care and operations costs make up a big part of city utilities costs. To get a complete picture of the lifecycle cost of an asset, it's also important to track all the costs that go into maintaining that asset. That includes labor of the people who work on it, the equipment used to form various necessary tasks, and the materials that are used for repair and maintenance. Tracking all of these costs can give you a much more comprehensive total of how much that asset costs over its entire lifecycle. This is also critical for proper planning as your city looks toward the future.

Chapter 6:

Go Mobile

You've got a team of field technicians that do all their work in the field. They need a simple interface so they can quickly and easily see what work they need to do, where that work is, and log the work as it gets done. Use the SimpleCity Mobile App to do all this and more in the field without having to worry about an internet connection. Field staff can see what activities they need to accomplish, when they need to be done, and where they are so they can efficiently plan their day without the need to come back to the office or transfer notes made with pen and paper.



Suggested Workflow

1

Assign mobile app users on the Admin Page. Each user is associated with a single device.

2

Log in on the device and see all activities. Sort by due date, activity type, or status.

3

Sync the Mobile App before going into the field.

4

Complete an activity by closing out tasks.

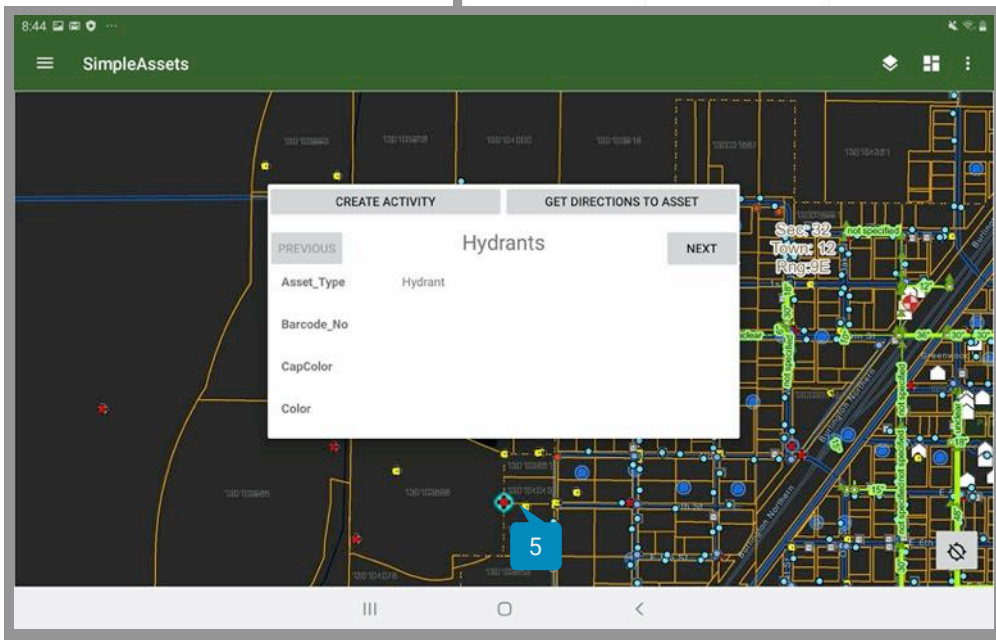
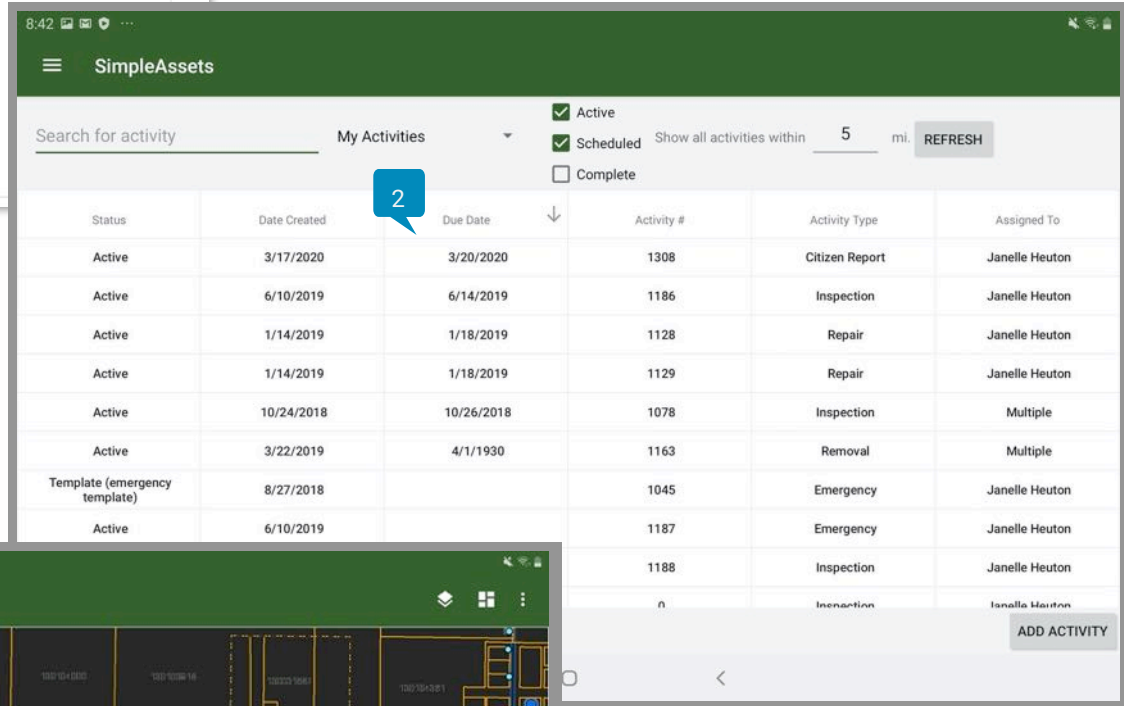
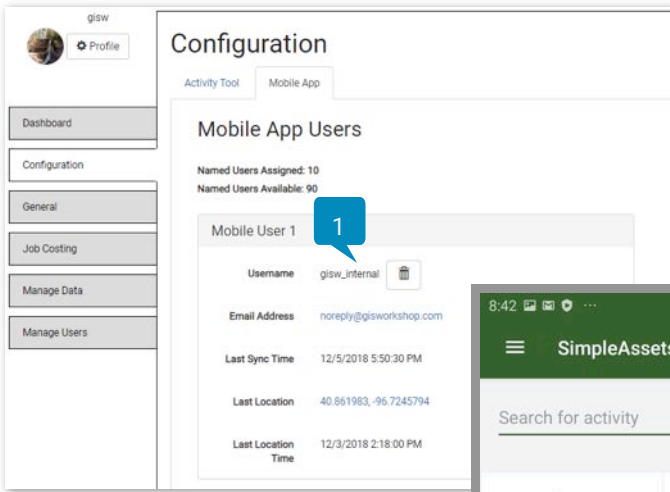
5

Use the map or the Assets Tab to find what you are looking for.

6

Upload photos or open the device's camera to snap photos of work done.

Pro Tip: Update your sync settings to maximize your device's battery life while still making sure that the data you collect on the App will be accessible on your SimpleCity site and to those working in the office.



Summary

The Mobile App increases the efficiency of field staff by giving them everything they need to manage and log their day to day activities in a single app. Wouldn't it be nice to know you or your team is equipped with everything they need to log what's being done in the field without having to come back to the office? Or knowing that work being logged is available in real-time on the web interface without having to sort through paper work orders? Using the Mobile App will solve these issues. Field staff will have the tools they need to effectively plan and log work. Office staff will have increased visibility of what's going on when it's actually happening.

Why It Matters

Implementing a Physical Asset Management software is a great step toward improved awareness, proactive asset management, and improved decision-making. However, the system is only as good as the data it holds. Ultimately it's up to you, the city, to utilize the software so you can truly see the benefits.

In our experience, we've seen cities who use the software experience a significant Return on Investment. With increased efficiencies of getting away from paper and into the cloud to track activities, we've seen ROI upwards of 700%!

At gWorks, we have the software solutions, professional services, and expertise to help you every step of the way on your Physical Asset Management journey.

CASE STUDY

After implementing SimpleCity Physical Asset Management, Mount Ayr, Iowa saw huge savings along with more efficient workflows. With increased efficiencies, they were able to shift unnecessary overhead hours and costs to productive hours and costs that directly benefit the city.

How much more can your city do with the money and time you'll be saving once you've implemented your Physical Asset Management System?

700%

Year 1 ROI

760+%

ROI to Date

\$22,000

Costs per year shifted from overhead to productive costs

1000+

Man-hours per year shifted from overhead to productive hours