BarKode Asset Management – Advanced

Description

This consultancy is designed to provide a full ISO 55001 aligned implementation underpinned and enabled by the BarKode Asset Management scanning smart phone application. The BarKode Asset Management – Advanced Services Package includes all features of the Essentials+ Services Package. Sessions will be scheduled in minimum 4-hour increments with remote access to the SMA unless otherwise agreed to by the Consultant and Customer in writing.

Overview

This 40 Hours (5 Day) / Remote Delivery Consultant led engagement is designed to assist customers to implement and document the BarKode Solution (a custom Integration to Quest Software's KACE SMA). The following milestones will be documented:

- Deliverables and scope agreed, including:
    - Corporate High-Level objectives
    - Asset Management program objectives
    - Defined Asset Management Scope
    - Agreed process scope
    - Defined Resources, physical and human
    - Agreed Stakeholders
    - Agreed Timescales
- BarKode Solution implemented and integrated with the Customer KACE SMA
- KACE SMA Configured to match defined Asset Management objectives and scope.
- Processes flows validated and documented.
- Work Instructions will be documented for each process.
- Knowledge Transfer and documentation – Work Instructions.
- Project signoff and closure.

Project Days / Activities – Defined

Day 1 – Project Kick-off- Defining Assets, Processes and Reporting Requirements

Identifying and defining key stakeholders, project sponsors, Asset Management managers and operators. All staff roles will be noted for the Asset Management process document.

Set Asset Management scope. Identify the financial baseline that defines the 'Assets'. Determine any exceptions to that baseline, i.e., business critical assets that may cost less than the threshold.

Discuss and define the managed assets for all fields that should be assigned by BarKode and populated in the KACE SMA. Data attributes may include financial data, purchase price, date-based alerts, depreciation and current asset values or management data such as location, status, owner, department, or cost-center as examples.

The Consultant will work with the Customer to define and document the key processes flows. During the kick-off meeting a choice of up to 6 (six) processes can be made from the following list:

- o Goods in / Order Receiving

- o Building and Commissioning

- o Installation and Assignment

- o Moves, Additions, Deletions

- o Repair / Warranty Management

- o Stores and Spare Equipment

- o Retirement or Removal

- o Ongoing Audits

- o Starters and Leavers

- o Consumables Management

- o Reporting Requirements - Up to 5 (five) custom reports will be included as a deliverable for the project. To ensure that the configuration of KACE reports allows for the data to be extracted in a format that can be used by the defined Stakeholders or Managers, Reporting Requirements will be defined on Day 1. Consideration should be given to the data content, report format and schedule for each report and this should be recorded in the project documentation.
- o Key timescales or delivery dates will be noted and agreed.

Day 2 – Process Definition and Technical Configuration

How BarKode and KACE are used within each process is clarified by the process definition. This enables the Consultant to configure the KACE SMA including Asset types, data fields, ticket rule automation, if required, and reports. This also includes KACE and BarKode configuration to ensure that BarKode app can interact correctly with the KACE SMA, reading data into the BarKode app and updating Asset data from the BarKode Application.

Using the 6 (six) defined processes that have been identified as being in scope, the Consultant works with the Customer to consider potential paths, recording the data changes that occur and require recording during each step. The process flow chart for each process will be

produced based on this data. Each of the 6 defined processes is then verified by the Customer and then added to the documentation.

Day 3 – Work Instruction Creation

Using these 6 (six) defined process, the Consultant creates Work instructions. Work Instructions include documenting each step needed with the KACE SMA UI and the BarKode App UI for staff to follow each of the 6 (six) defined processes. These Work Instructions are the Training and Reference material for the operators and managers of the Asset Management Processes.

Day 4 – Reporting

- Completion of Work Instruction documentation from Day 3.
- Product functionality testing against the Work Functionality as well as defined processes.
- Reporting requirements validated and reports created as required.

Day 5 – Project Completion

- Project completion meeting and review.
- Final validation with Customer on the process and Work Instruction documentation created,
- Reports reviewed. Customer receives the completed solution and documentation as well as knowledge transfer.
- Project closure and signoff.

Additional Training Topics

Customers may work with their LightSpeed PM Sales Representative to make additional purchase of hours for custom elements that can be defined, scoped, and added to the project.

For example:

- Additional Processes requiring definition and configuration.
- Additional formal training program to support the Asset Management Program.
- Additional KACE configuration, such as Ticket rules to support Data automation.
- Asset Identification and physical labelling using BarKode solution.
- Asset Management Dashboards and / or additional reports.