Appendix 1

Asset Management Software Requirements

DATA IN/OUT- FINANCIAL

Current 'MRA Excel Spreadsheet' detailing capital works –'Key Components' Under Decent Homes

Data Subject:	Bathrooms	Electrics (Re Wires, Smokes)	Heating	Kitchens	Roofs	Windows / Doors	Planned External Maintenance

Other Changes to Asset Value:

Reactive Repairs / Voids / Adaptations / Social Decarbonisation Fund Works /Ongoing compliance checks, cyclical maintenance

Use Case Needed:

Financial information to be extracted from various systems and sources to a single location that provides management reporting functions to allow costing analysis, identify patterns and trends and strategically plan whole asset management lifecycle

All contractors to be set up on the system so that financial information links directly to orders raised on the system this will give proper cost analysis rather than manual reconciliation of emailed orders

Asset data needs to be synchronised with the Repairs system so that operatives, contractors and staff have access to component information which will inform decision making around repairs and defect liability periods

DATA IN – Current Reconciliation With Other Data Sources

Assets – System Data Required From Other Software / Sources to keep Asset Information current and up to date

Data Subject:	Grounds Maintenance Asset Data	Sold Property Data	New Property Data			Adaptions Data	Planned and Reactive Repairs Data
Software / Data Source:	Astun GIS Software / Ad hoc additions raised via queries	RAMS / MRI Enterprise	Local Land and Property Gazetteer (LLPG) (new property address data)	Strategic Housing (property attribute data)		Disabled Facilities Grants (Capital works –attribute data and maintenance schedules	MRI (works over certain value-= Capital works /attribute data and maintenance schedules)
Data Format:	GIS Shapefiles, Excel, PDFs of maps	CSV File /Business Objects Report	CSV file	CSV / Excel / PDFs/ Word files?		CSV file	Excel File
Purpose:	Informs Maintenance Programmes for Housing Land. Such as: Planned grass cutting, street scene schedules, Planned maintenance scheduling on garage sites, Housing land etc	Ensure sold properties are 'retired from system' Plan future works for any maintenance obligations that are agreed for post sale	Ensures all new properties contain accurate and up to date addresses LLPG UPRN can be used as the 'golden thread' across council data sets (will ensure ease of use of Business Objects)	Informs Maintenance Programmes and compliance scheduling works on new properties		Enable Housing Officers to allocate suitable houses post void. Enable accurate property attribute data used to plan works and gauge amount spent on property	Used as part of Right to Buy - £ spent on property Used to inform decision on Void management and planned works
Use Case Required:	Creation of Housing Maintenance Schedule of Works	Retire property and decommission any works planned.	Data Synchronisation: add/ amend / delete address data	Creation of Improvement Schedules and Compliance Programmes		Data Synchronisation: add / amend / delete adaption data	Data Synchronisation: add / amend / delete repair data (inc. cost)
Frequency:	Ad hoc plus when complaints arise	As and when changes emerge	As and when changes emerge	As and when changes emerge		As and when changes emerge	As and when changes emerge

These processes are currently manually inputted into the Asset Recording Software and manually updated in every compliance excel spreadsheet and within MRI Enterprise

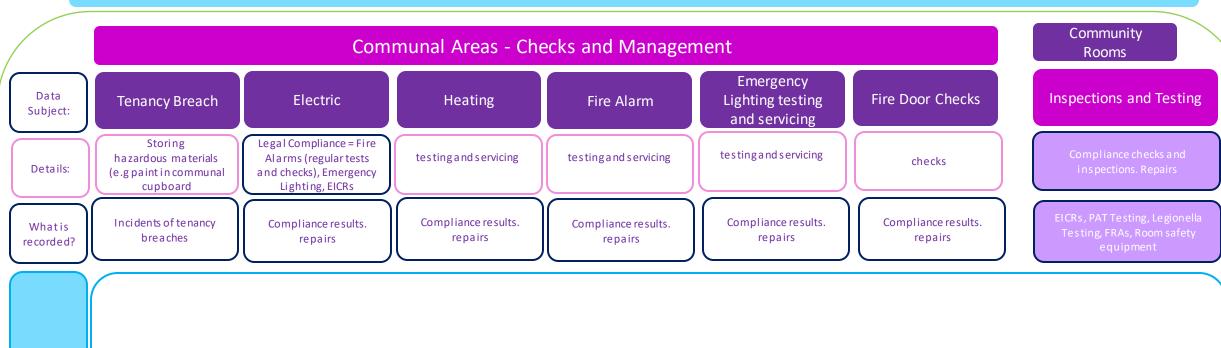Data currently sits in its respective software application and isn't linked or shared with other applications

DATA IN/OUT - FLEGAL – Legal and Regularity Requirements

Compliance – System Data Required To Programme and Manage Compliance Workstreams

Data Subject:	Heating	Environment	Buildings	Buildings (SHDF) Decent Homes	Electrical	Lifts	Fire
Software / Data Source:	Outlook (email)	Outlook (email)	Sharepoint / Outlook / Excel	Outlook (email)	'Master Elec' excel asset record, contractor programmes in excel	Outlook	Outlook
Data Format:	Certs -PDF (new installs and LGSR annual checks)	Certs -PDF	Certs -PDF, MRA data manually transposed from invoices	Certs -PDF, MRA data manually transposed from invoices	Certs -PDF, asset data manually transposed into excel	Certs PDF	Certs -PDF, FRAs managed via excel
Purpose:	Record works, attribute data, and plan future schedules for: New Heating Installs Gas Safety Checks C02 and smoke detection	Record compliance works and plan future schedules of surveying /testing and remedials for: Asbestos Management Legionella Safety Lifts (Communal areas and domestic properties)	Record works and plan future schedules for: FRAs, Fire detection and emergency lighting checks (Communal) Replacement Kitchens, Bathrooms, Windows, Roofs	Record Condition Surveys and plan future schedules	Record compliance works and plan future schedules of surveying /testing and remedials for: Re-Wire Installations Electrical Testing Smoke Detection Upgrades (LD1 And LD2)	Record Lift Inspections (Loler??)	Record Fire Risk Data and associated test and inspections
Use Case Required:	Need 'protected characteristics data' to adapt appointments if need be. Workflow management to raise repair, inspection and tenancy management jobs. Appointment Management Solution. Record and store Compliance Reports and report on overall compliance management – dashboard. Contractors to feed results directly into the solution via existing contractor portal in MRI Repairs and Planned Maintenance						
Frequency:	Daily /Weekly / Monthly						

These compliance workstreams are managed predominantly by email and excel spreadsheets. Results are recorded across multiple systems manually. Many of the data formats are non compatible for management reporting (PDF compliance reports as opposed to CSV files). Remedial works and compliance results are not automated or linked to other systems. No overall compliance dashboards to workflow performance trackers. Risk information not readily available to Direct Labour Organisation for repair Risk Assessment Planning

Compliance / survey data needs to be synchronised with the Repairs system so that operatives and contractors have access to key risk information such as asbestos risk information

DATA IN/OUT- FLEGAL

Communal Areas - Checks and Management

Community Rooms

Data Subject:	Tenancy Breach	Electric	Heating	Fire Alarm	Emergency Lighting testing and servicing	Fire Door Checks	Inspections and Testing
Details:	Storing hazardous materials (e.g paint in communal cupboard	Legal Compliance = Fire Alarms (regular tests and checks), Emergency Lighting, EICRs	testing and servicing	testing and servicing	testing and servicing	checks	Compliance checks and inspections. Repairs
What is recorded?	Incidents of tenancy breaches	Compliance results. repairs	Compliance results. repairs	Compliance results. repairs	Compliance results. repairs	Compliance results. repairs	EICRs, PAT Testing, Legionella Testing, FRAs, Room safety equipment
Purpose:	Meet Health, Safety and Compliance legal and regulatory requirements.						
Use Case Needed:	Workflow management to raise repair, inspection and tenancy management jobs. Record and store Compliance Reports and report on overall compliance management -dashboard						