Before Purchasing an Enterprise Asset Management (EAM) Software Package

We must consider these Agency requirements:

- What is our agency's vision and strategic plan?
- What level of asset management maturity is our agency at presently?
- Where do we want our asset management maturity to be in 1, 5, 10, or more years?
- What are we prepared to invest in operating and maintaining resources (cost and time)?
  - the system
  - the data
  - the personnel
- What are our current business processes? Can they be further optimized with the purchase of an EAM?
- How will our EAM interface or integrate with other software systems?
- What are our current and projected system capacity needs? (storage and speed)
- How agile do we want our EAM to be? Do we want to be able to make user interface changes on the fly or are we willing to wait for updates to software?
- What volume of assets do we presently own, operate, or maintain?
- What volume of assets will we own, operate, or maintain in 5, 10, and 15 years?
- How deep is our asset breakdown structure? How deep do we want it to be?
- What asset data do we want and at what granularity?
  - maintenance
  - finance / accounting / grants
  - capital
  - labor
  - regulatory
- What reports and dashboards do we want? What reports and dashboards do we need?
  - front-line staff
  - management
  - business units
  - execs & regulatory
- How many users do we have and how many will we have?
- User Groups
  - permissions by job position, branch, office & department
  - skill levels: user, advanced user, and super user/SME
- Security of the data and system itself?
- What level of training and training material will we require for 1, 5, 10, or more years?

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Agency Requirements ❯ Agency Budget ❯ Agency Timeline ❯ Agency Goals ❯ Software Selection

Types of Software

➢ COTS: Commercial Off-The-Shelf software. Often a one-time purchase for software. Pay to upgrade. Unusual to have Subscriptions.

➢ aPaaS: Application Platform as a Service. Cloud based. Highly configurable. Subscription based. "New" to the transit industry.

➢ Customized: Built entirely in-house.

Software Options

➢ Out-of-the-Box: Any functionality that comes shipped directly from the software vendor or can be configured easily (where "easily" means configured by a business, not IT user) with built in workflow tools, templates, and/or best practices provided by the vendor.

➢ Configurable: Any functionality that can be created using built-in workflow tools shipped To be considered configurable, functionality should be forward-compatible with future releases.

➢ Customizable: Any functionality that is configured using built-in workflow tools shipped by the vendor, but may not be forward compatible with future releases. Also, other functionality not shipped directly from the vendor that cannot be created using built-in workflow tools shipped by vendor. All customization has no guarantee of compatibility with future releases and contains the risk of beign costly to maintain over time.

Who's driving this train? or bus? or boat?