

EAMLibrary

Enterprise Asset Management Playbook™

ISO 55000 Asset Management System



Introductory Materials

Title Page	00-00-00
Copyright Page	00-00-01
Short Table of Contents	01-00-00
Introduction to EAM Playbook	02-00-00

Executive Leadership

Executive Leadership Overview	E0-00-00
Table of Contents	E0-01-01
Strategic Asset Management Plan	E1-00-00
Asset Management Policy	E1-01-01
Asset Management Objectives	E1-01-02
Asset Management Strategy	E1-01-03
Organization & Management	E2-00-00
Asset Management Organizational Chart	E2-01-01

Work Management

Work Management Overview	W0-00-00
Table of Contents	W0-01-01
Organization & Management	W1-00-00
Maintenance Organization	W1-01-00
Maintenance Manager Role	W1-01-01
Maintenance Supervisor Role	W1-01-02
Maintenance Planner Role	W1-01-03
Maintenance Scheduler Role	W1-01-04
Maintenance Technician Role	W1-01-05
Requestor Role	W1-01-06
Operations Maintenance Coordinator Role	W1-01-07
Shutdown Event Coordinator Role	W1-01-08
Equipment Focus Team	W1-01-09
Work Management Responsibilities Matrix	W1-01-10
EAM System Administrator Role	W1-01-11
Reliability Organization	W1-02-00
Reliability Manager Role	W1-02-01
Reliability Engineer Role	W1-02-02
Reliability Focus Team	W1-02-03
PM Optimization Focus Team	W1-02-04
Practices	W2-00-00
Flowchart: Work Life Cycle (Overview)	W2-00-F1
Flowchart: Work Management (Overview)	W2-00-F2
Asset Tracking	W2-01-00
Asset Data	W2-01-01
Flowchart: Asset Commission Notification	W2-01-F1

Flowchart: Asset Decommission Notification	W2-01-F2
Flowchart: Asset Data	W2-01-F3
Work Identification and Control	W2-02-00
Routine Work Orders	W2-02-01
Urgent Work Orders	W2-02-02
Emergency Work Orders	W2-02-03
Standing Work Orders	W2-02-04
Flowchart: Work Identification & Control – Routine Work	W2-02-F1
Flowchart: Work Identification & Control – Urgent Work	W2-02-F2
Flowchart: Work Identification & Control – Emergency Work	W2-02-F3
Work Planning	W2-03-00
Scoping and Estimating Work	W2-03-01
Work Plan	W2-03-02
Creating Standard Work Orders	W2-03-03
Implementing the Work Plan	W2-03-04
Flowchart: Work Planning Process (Overview)	W2-03-F1
Flowchart: Scoping and Estimating Process	W2-03-F2
Flowchart: Creating Work Plans	W2-03-F3
Project Management Coordination	W2-04-00
Project Initiation	W2-04-01
Project Cost Tracking	W2-04-02
Project Closure	W2-04-03
MRO Supply Chain Coordination	W2-05-00
Work Scheduling	W2-06-00
Resource Availability Schedule	W2-06-01
Preliminary Weekly Work Schedule	W2-06-02
12-Month Schedule	W2-06-03
8-Week Schedule	W2-06-04
Weekly Work Schedule	W2-06-05
Daily Work Schedule	W2-06-06
Work Scheduling Flows and Calendars	W2-06-07
Flowchart: Work Scheduling Process (Overview)	W2-06-F1
Work Completion	W2-07-00
Emergency Work	W2-07-01
Urgent Work	W2-07-02
Routine Work	W2-07-03
Work Order Feedback	W2-07-04
Flowchart: Work Completion – Emergency Work	W2-07-F1
Flowchart: Work Completion – Non-Emergency Work	W2-07-F2
Shutdown Coordination	W2-08-00
General Shutdown Process	W2-08-01
Minor Shutdown Coordination	W2-08-02
Major Shutdown Coordination	W2-08-03
Asset Reliability Program	W2-09-00

Creating PM / PdM Work Plans	W2-09-01
Reliability Improvement Process	W2-09-02
Work and Asset Coding	W2-09-03
Failure Mode and Effects Analysis	W2-09-04
Root Cause Analysis	W2-09-05
Cause and Effects Analysis	W2-09-06
Flowchart: Creating PM / PdM Work Plans	W2-09-F1
Flowchart: Creating Reliability Improvement Process Report	W2-09-F2
Content	W3-00-00
Data Requirements	
Equipment Data	W3-01-01
Code Libraries	
Work Order Codes	W3-02-01
Information Systems	W4-00-00
Operational Reporting	W4-01-01
Cost & Budget Reporting	W4-01-02
Analysis Reporting	W4-01-03
Data Filters	W4-01-04
Performance Management	W5-00-00
Key Performance Indicators	
PM / PdM Work Schedule Compliance	W5-01-01
PM / PdM Work Percentage	W5-01-02
Urgent Work Percentage	W5-01-03
Emergency Work Percentage	W5-01-04
EAM Work Capture Percentage	W5-01-05
Scheduled Work Percentage	W5-01-06
Critical Equipment with PM / PdM Assigned	W5-01-07
Critical Equipment Emergency Work	W5-01-08
Unscheduled Work Percentage	W5-01-09
Maintenance Safety Incidents	W5-01-10
Maintenance Training Time	W5-01-11
Mean Time Between Failures	W5-01-12
Failure Code Occurrences for Quarter	W5-01-13
Delay Code Occurrences for Month	W5-01-14
Maintenance Overtime Percentage	W5-01-15
Planning Effectiveness	W5-01-16
Maintenance Utilization Percentage	W5-01-17
Contractor Cost Percentage	W5-01-18
Internal Labor Cost Percentage	W5-01-19
Ready Backlog Size in Crew-Weeks	W5-01-20
Weekly Work Schedule Compliance	W5-01-21
Maintenance Percentage of Facility ERV	W5-01-22
Maintenance Cost per Unit of Production	W5-01-23
Catalog Materials on a BOM	W5-01-24
Work Mix by Priority	W5-01-25

Distribution of PM / PdM Work Types	W5-01-26
Maintenance Cost per Square Foot	W5-01-27
Unscheduled Maintenance Downtime	W5-01-28
On-Line Work Request Adoption Rate	W5-01-29
Maintenance Spending to Budget	W5-01-30
Average Age of Completed Work	W5-01-31
Audit Scoresheet	
Audit Scoresheet	W5-02-01
Supplemental Documents	W6-00-00
Blank Forms and Spreadsheets	
Daily Approval Meeting Agenda	W6-01-01
Weekly Scheduling Meeting Agenda	W6-01-02
Daily Scheduling Meeting Agenda	W6-01-03
Labor Estimating Worksheet	W6-01-04
Work Planning Checklist	W6-01-05
Reliability Improvement Process Report	W6-01-06
Failure Mode and Effects Analysis Worksheet	W6-01-07
Root Cause Analysis Worksheet	W6-01-08
Asset Commission Notification Form	W6-01-09
Asset Decommission Notification Form	W6-01-10
Work Order Feedback Form	W6-01-11
Sample Materials	
Sample PM / PdM Work Plan	W6-02-01
Sample Weekly Work Schedule	W6-02-02
Sample Daily Work Schedule	W6-02-03
Sample Maintenance Schedule (Daily and Weekly)	W6-02-04
Sample Resource Availability Schedule (One Month)	W6-02-05

Materials Management

Materials Management Overview	M0-00-00
Table of Contents	M0-01-01
Organization & Management	M1-00-00
Policies & Guidelines	
MRO Materials Management Policy	M1-01-01
Roles & Responsibilities	
Materials Management Organization	M1-02-01
Storeroom Supervisor Role	M1-02-02
Storeroom Attendant Role	M1-02-03
MRO Materials Focus Team	M1-02-04
Materials Management Responsibilities Matrix	M1-02-05
Practices	M2-00-00
Storage Facilities and Equipment	M2-01-00
Number and Location of Storerooms	M2-01-01
Storeroom Security	M2-01-02

Storeroom Space and Layout	M2-01-03
Location Identification Scheme	M2-01-04
Materials Organization	M2-01-05
Storage Equipment	M2-01-06
Material Handling Equipment	M2-01-07
Barcode Scanners	M2-01-08
Item Labels	M2-01-09
Storeroom Environment	M2-01-10
Storeroom Operations	M2-02-00
Receiving	M2-02-01
Receiving Stock Items	M2-02-02
Receiving Direct Expense Items	M2-02-03
Stocking	M2-02-04
Inventory Control	M2-02-05
Inventory Cycle Count	M2-02-06
Inventory Adjustments	M2-02-07
Issuing	M2-02-08
Picking	M2-02-09
Kitting	M2-02-10
Staging	M2-02-11
Delivery	M2-02-12
Return to Storeroom	M2-02-13
Return to Supplier	M2-02-14
Flowchart: Receiving Process (Overview)	M2-02-F1
Flowchart: Receiving Stock Items	M2-02-F2
Flowchart: Receiving Direct Expense Items	M2-02-F3
Flowchart: Inventory Cycle Count Process	M2-02-F4
Flowchart: Issuing Process	M2-02-F5
Flowchart: Return to Storeroom Process	M2-02-F6
Flowchart: Return of Damaged Items	M2-02-F7
Flowchart: Return to Supplier Process	M2-02-F8
Flowchart: Repairable Materials Process	M2-02-F9
Inventory Management	M2-03-00
Inventory Strategies	M2-03-01
Repairable Materials	M2-03-02
Warranty Administration Program	M2-03-03
Critical Spares	M2-03-04
Free-Issue Materials	M2-03-05
Project Materials	M2-03-06
Inventory Analysis	M2-03-07
ABC Classification	M2-03-08
Obsolete Inventory Identification	M2-03-09
Excess Inventory Identification	M2-03-10
XYZ Classification	M2-03-11

Inventory Test Counts	M2-03-12
Inventory Optimization	M2-03-13
Inventory Disposal and Investment Recovery	M2-03-14
Flowchart: Obsolete Inventory Identification Process	M2-03-F1
Flowchart: Excess Inventory Identification Process	M2-03-F2
User Coordination	M2-04-00
Equipment Change Notification	M2-04-01
Bills of Materials	M2-04-02
Catalog Setup Request	M2-04-03
Inventory Setup Request	M2-04-04
Critical Spares Identification	M2-04-05
Delivery and Pickup Zones	M2-04-06
Material Requirements	M2-04-07
Estimating Material Requirements	M2-04-08
Reserving Catalog Materials	M2-04-09
Direct Purchases	M2-04-10
Pick Tickets	M2-04-11
Return to Storeroom	M2-04-12
Shutdown Schedules	M2-04-13
Procurement Coordination	M2-05-00
Materials Purchase Requisition Process	M2-05-F1
Services Purchase Requisition Process	M2-05-F2
Content	M3-00-00
Data Requirements	
Supplier Data	M3-01-01
Equipment Data	M3-01-02
Work Order Data	M3-01-03
Purchase Data	M3-01-04
Usage Data	M3-01-05
Inventory Adjustment Data	M3-01-06
Item Data	M3-01-07
MRO Naming Conventions	M3-01-08
Information Systems	M4-00-00
Operational Reporting	M4-01-01
Cost & Budget Reporting	M4-01-02
Data Filters	M4-01-03
Performance Management	M5-00-00
Key Performance Indicators	
Cycle Count Completion Percentage	M5-01-01
Operational Inventory Accuracy	M5-01-02
Storeroom Service Level	M5-01-03
Internal Lead Time	M5-01-04
Item Analysis	M5-01-05
Inventory Turns	M5-01-06
Scheduled Issue Transactions Percentage	M5-01-07

Storeroom Materials on a BOM	M5-01-08
Cycle Count Inventory Accuracy Percentage	M5-01-09
Audit Scoresheet	
Audit Scoresheet	M5-02-01
Supplemental Documents	M6-00-00
Blank Forms and Spreadsheets	
Catalog Setup Request Template	M6-01-01
Sample Materials	
Sample Audit Scoresheet	M6-02-01

Procurement

Procurement Overview	P0-00-00
Table of Contents	P0-01-01
Organization & Management	P1-00-00
Policies & Guidelines	
Procurement Policy	P1-01-01
Procurement Objectives	P1-01-02
Procurement Authority & Delegation	P1-01-03
Procurement Business Conduct	P1-01-04
Roles & Responsibilities	
Procurement Organization	P1-02-01
Procurement Manager Role	P1-02-02
Buyer Role	P1-02-03
MRO Procurement Team	P1-02-04
Procurement Responsibilities Matrix	P1-02-05
Practices	P2-00-00
Catalog Setup	P2-01-01
Flowchart: Catalog Item Setup Process	P2-01-F1
Purchase Requisitions	P2-02-01
Flowchart: Purchase Requisition Process (Overview)	P2-02-F1
Flowchart: OPEX Purchase Requisition Process	P2-02-F2
Flowchart: CAPEX Purchase Requisition Process	P2-02-F3
Flowchart: Stock Replenishment Process	P2-02-F4
Quotations	P2-03-01
Contracting Overview	P2-04-00
Requirements Definition	P2-04-01
Sole Source	P2-04-02
Supplier Search	P2-04-03
Supplier Qualification	P2-04-04
Supplier Setup	P2-04-05
Request for Proposal	P2-04-06
Bid Evaluation	P2-04-07
Bid Analysis Program	P2-04-08
Supplier Notification	P2-04-09

Contract Development	P2-04-10
Contract Administration	P2-04-11
Flowchart: Contracting Overview	P2-04-F1
Flowchart: Supplier Setup Process	P2-04-F2
Flowchart: Request for Proposal Process	P2-04-F3
Purchase Orders Overview	P2-05-00
Purchase Order Terms & Conditions	P2-05-01
Standard Purchase Orders	P2-05-02
Emergency Purchase Orders	P2-05-03
Blanket Purchase Orders	P2-05-04
Service Purchase Orders	P2-05-05
Automatic Reorder	P2-05-06
Flowchart: Purchase Order Process	P2-05-F1
Flowchart: Emergency Purchase Order Process	P2-05-F2
Shipping & Receiving Overview	P2-06-00
Expediting	P2-06-01
Materials Receiving	P2-06-02
Services Receiving	P2-06-03
Return to Supplier	P2-06-04
Flowchart: Materials Receiving Process	P2-06-F1
Flowchart: Materials Receiving Discrepancy Process	P2-06-F2
Flowchart: Services Receiving Process	P2-06-F3
Flowchart: Return to Supplier Process	P2-06-F4
Accounting & Invoicing	P2-07-00
Accounting Coordination	P2-07-01
Invoicing	P2-07-02
Flowchart: Materials Accounting Coordination Process	P2-07-F1
Flowchart: Services Accounting Coordination Process	P2-07-F2
Warranty Administration	P2-08-01
Supplier Evaluation	P2-09-01
Content	P3-00-00
Data Requirements	
Item Data	P3-01-01
Supplier Data	P3-01-02
Purchase Order Data	P3-01-03
MRO Naming Conventions	P3-01-04
Code Libraries	
Purchase Order Codes	P3-02-01
Information Systems	P4-00-00
Operational Reporting	P4-01-01
Cost & Budget Reporting	P4-01-02
Data Filters	P4-01-03
Performance Management	P5-00-00
Key Performance Indicators	
Average Total Replenishment Time	P5-01-01

Average Internal Lead Time	P5-01-02
Average Supplier Lead Time	P5-01-03
Contract Supplier Spend Percentage	P5-01-04
System Purchase Percentage	P5-01-05
Freight Cost Percentage	P5-01-06
Emergency Purchase Percentage	P5-01-07
Average PO Lines Processed	P5-01-08
Purchase Order Acknowledgement	P5-01-09
Single Line Item Purchase Percentage	P5-01-10
Expedited Purchase Percentage	P5-01-11
Past Due PO Line Percentage	P5-01-12
Supplier Return Percentage	P5-01-13
Supplier On-Time Delivery Percentage	P5-01-14
Supplier Invoice Discrepancy Percentage	P5-01-15
Audit Scoresheet	
Audit Scoresheet	P5-02-01
Supplemental Documents	P6-00-00
Blank Forms and Spreadsheets	
Catalog Setup Request Form	P6-01-01
Supplier Scorecard	P6-01-02
Purchase Order Terms & Conditions	P6-01-03
Sole Source Agreement	P6-01-04
Pre-Qualification Form	P6-01-05
Bid Result Confirmation	P6-01-06
Bid Analysis Program (BAP) Matrix	P6-01-07

Appendices

Appendix A: Glossary of Terms and Acronyms	A1-00-00
Appendix B: Complete Table of Contents	A2-00-00
Appendix C: Change Request Form	A3-00-00