

Asset Data Collection

Standard Operating Procedure

Document Information

Procedure Owned By:	Planning & Systems Manager, Facilities Services
Intended Audience:	Contractors, Third Party Vendors, Project Team
Last Revision Date:	11/19/2025

Purpose

UW Bothell and Cascadia College Facilities Services utilize the Asset Data Collection Tool (Excel) to import asset information into the Computerized Maintenance Management System (CMMS), Megamation DirectLine. This process ensures the accuracy and integrity of asset data, which is essential for informed budgetary planning, effective preventive maintenance, cost avoidance, and comprehensive management of the campus asset portfolio.

Systems & Tools Used

Fillable Spreadsheet: UWB/CC Asset Data Collection Tool

Reference Documentation: Existing Asset List for the building where the project is taking place (read-only; not for editing or new asset entry)

Procedure

Follow these steps to ensure accurate asset data collection and submission. Responsible roles are noted where applicable.

- 1. Obtain the Asset Data Collection Tool**

At the start of the project, request the fillable Asset Data Collection Tool spreadsheet or download a copy from the UWB/CC Facilities Services

website.

Responsible: Contractor/Project Team

2. **Request Existing Asset List (Optional)**

If needed, request a read-only copy of the Existing Asset List for the building where work will occur. This list is for reference only and must not be edited or used for new asset data entry.

Responsible: Contractor/Project Team

3. **Populate Asset Data (ACTIVE)**

Using the Asset Data Collection Tool, enter individual asset information in each row. Ensure all required fields (highlighted in yellow) are completed. For all newly installed assets set status to **ACTIVE**.

Responsible: Contractor/Project Team

4. **Document Asset Removal (DEMO)**

If the project scope includes removing or demolishing an existing asset, list the asset in the tool and set its status to **DEMO**.

Responsible: Contractor/Project Team

5. **Document Asset Deactivation (INACTIVE)**

If the project scope includes disconnecting an asset from service but leaving it in place, list the asset in the tool and set its status to **INACTIVE**.

Responsible: Contractor/Project Team

6. **Submit Completed Spreadsheet**

After all asset data has been collected and verified for completeness, send the spreadsheet to your designated UWB/CC Project Contact.

Responsible: Contractor/Project Team

7. **Review and Validation**

The Project Contact will collaborate with the Planning & Systems Manager to review the submitted data for accuracy and compliance with required formatting.

Responsible: Project Contact & Planning & Systems Manager

8. **Correction of Errors**

If errors or missing data are identified, the Project Contact will return the spreadsheet to the contractor for correction. Once corrected, resubmit the document to the Project Contact.

Responsible: Contractor/Project Team

9. Data Import into CMMS

After verification, the asset data will be imported into the CMMS (Megamation DirectLine).

Responsible: Planning & Systems Manager

Definitions & Field Requirements

The following outlines each spreadsheet field, its purpose, required format, and any predefined options. Required fields are noted.

Fixed Asset #:

Unique identifier for each asset. Format: **Building-Room-Asset-Tag**. Example: 4th Variable Frequency Device located in the UW1 Penthouse, Fixed Asset # would be UW1-PH-VFD-04. *Required field.*

Asset Tag:

Equipment tag physically attached to the asset.
Required field.

Asset Description:

Longer descriptive text about the asset, including key characteristics.
Required field.

Parent:

Identifies the higher-level asset that includes this individual (child) asset. Builds the hierarchical structure in the system. *Required field.*

Class:

Groups assets of the same type for reporting purposes.
Predefined dropdown list in the system. Required field.

Building:

Building where the asset is located.
Prepopulated dropdown list of all UWB/CC campus buildings. For new buildings, select "NEW." Required field.

Room #:

Room number where the asset is located.
Provided list for existing buildings. Required field.

Location:

Detailed description of the asset's location beyond the room number (e.g., "North wall, near HVAC unit").

Manufacturer:

Name of the asset's manufacturer.

Required field.

Model:

Model designation of the asset.

Required field.

Serial Number:

Serial number assigned by the manufacturer.

Required field.

Status:

Indicates the asset's operational state. Options below. *Required field.*

- **ACTIVE:** Installed and operational
- **DEMO:** Removed or demolished
- **INACTIVE:** Disconnected but left in place
- **TOS:** Temporarily out of service

Warranty End Date:

Date warranty coverage ends. Format: **MM-DD-YYYY**.

Install Date:

Date the asset was installed. Format: **MM-DD-YYYY**.

Required field.

Uniformat:

Classification system for building elements, systems, and assemblies.

Provide Uniformat Level 3 code from the predefined dropdown list. Required field.

Useful Life:

Projected length of time the asset remains functional. Enter as **numeric years only**. *Required field.*

Replacement Cost:

Estimated material cost to replace the asset.