Date: **Participating Members:** **Assessment Context:**

C-Store, Integrate, and Access Data
1-Databases

C.1.c – Document Linkages

Element Description	Processes and technologies for linking documents to assets, projects, and locations.

Benchmark Level 0	Benchmark Level 1	Benchmark Level 2	Benchmark Level 3	Benchmark Level 4
Documents related to specific assets or projects may be filed in folders for the asset or project but are not directly linked through metadata or other methods.	Selected document types can be linked to associated assets, projects, and locations. Approaches may vary across document types or systems.	Standardized approaches are used to connect documents to assets, projects, locations but there are no established business processes or roles to ensure execution.	An electronic document management system is integrated with asset management, project management, location referencing systems and tools. Business processes and roles for document management are documented, but may not be monitored.	An electronic document management system is integrated with asset management, project management, location referencing systems and tools. Business processes are documented and monitored to ensure application.
Current: ☐ Desired: ☐	Current: ☐ Desired: ☐	Current: ☐ Desired: ☐	Current: ☐ Desired: ☐	Current: ☐ Desired: ☐
☐ Review existing document standards and metadata with asset Subject Matter Experts (SMEs). Flag opportunities to incorporate linkages to assets, projects and locations within individual processes.	☐ Review existing document standards and metadata with asset SMEs. Flag opportunities to incorporate linkages across processes and programs.	☐ Develop an electronic document management system with defined metadata providing linkages for priority documentation.	☐ Document and apply detailed document metadata business rules useful in flagging documentation that has been improperly tagged.	
☐ Take advantage of available document management systems to establish metadata elements for asset ID, project ID and location.	☐ Standardize use of asset, project, work order unique identifiers and location referencing within key asset related documentation.	☐ Document business processes, roles and responsibilities for applying standard metadata during document creation and/or update.	☐ Routinely evaluate document metadata practices to ensure they are meeting business needs.	
☐ Other:	☐ Other:	☐ Other:	☐ Other:	

Assessment Notes:

Improvement Notes: