C-Store, Integrate, and Access Data
3-Other Data Integration Workflows

C.3.a – Financial (Revenue, Budget, Expenditure) Data

Element Description   Established data flows from financial systems to systems used for asset management, work planning and tracking.

Benchmark Level 0	Benchmark Level 1	Benchmark Level 2	Benchmark Level 3	Benchmark Level 4
No defined data flow between asset management systems and financial systems.	Data views are defined to facilitate access to, and review of, financial data supporting asset management decision-making. This data is presented in a manner intended for use in asset improvement optimization and selection, work planning and tracking.	Simple data flows are implemented, allowing pre-population of current budget limits into asset management optimization analysis and/or work planning tools.	More detailed data flows are implemented, allowing current budget limits, total expenditures, remaining funds, and future funding forecasts to be pre-populated by discrete fund, project, or work categories into asset management optimization analysis and/or work planning tools.	Budget and expenditure information automatically flows to systems used for asset management, work planning and tracking. Updated information is available in real time or updated on a daily basis.
Current: ☐ Desired: ☐	Current: ☐ Desired: ☐	Current: ☐ Desired: ☐	Current: ☐ Desired: ☐	Current: ☐ Desired: ☐
☐ Develop standard views or reports to expose financial data for use in asset management processes.	☐ Summarize data stored in financial systems to support integration into optimization and work planning tools.	☐ Transform detailed financial system data to support integration into optimization and work planning tools.	☐ Assess existing data flows and identify refinements to include additional detail (or reduce detail). Develop specifications for direct integration into optimization and work planning tools.	
☐ Engage Subject Matter Experts (SMEs) from asset management and financial business units to identify opportunities for improved coordination.	☐ Pilot test and implement simple, manual or semi-automated financial data integrations. Provide quality assessment tools to support informed data use.	☐ Pilot test and implement batch processes to transfer financial data. Integrate quality assessment tools to ensure appropriate data use.	☐ Pilot test and implement fully automated processes to transfer financial data. Integrate quality assessment tools to ensure appropriate data use.	
☐ Other:	☐ Other:	☐ Other:	☐ Other:	

Assessment Notes:

Improvement Notes: