



BUILDER to ESMS Migration Exploration

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DIGON Systems

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TETRA TECH

Jacobs



POND

ESMS Migration Prep

Kurt Sorensen

Presentation Goal

1. Provide the audience with steps to prepare and elements to expect in a migration from BUILDER to ESMS
2. Considerations for program changes to maximize the benefits of ESMS

SMS-TCX Migration Onboarding

File Home Insert Draw Page Layout Formulas Data Review View Help Acrobat

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Complete the ORANGE tabs (worksheets) from LEFT to RIGHT

1. What is E-COP?
E-SMS Customer Onboarding Packet (E-COP) is a step-by-step guide consisting of three phases: intake, integration, and production. This spreadsheet will assist customers (agencies) navigating the E-SMS on-boarding process to establish the initial Organization and Site configurations within the new cArmy E-SMS environment.

2. How does E-COP work?
Customers provide the CERL E-SMS migration team the initial "seed"¹ data to establish the basic functionality for the user community.

Phase I - Intake

1. Initiate Request
a. Customer's Point of Contact (POC) will submit a request with the Organization/Agency and Sites to be integrated into the initial session.
b. E-SMS On-boarding migration team (E-OBMT) will schedule the kickoff meeting with customers.

2. Kickoff Meeting
a. E-OBMT walk through of the entire process of each step in each phase of the onboarding process to address questions and concerns.

3. Submit E-COP - customers complete the packet and submit to SMSsupport@erdc.dren.mil

4. E-COP Review & Approval - the E-SMS Support team will validate that all required² data fields in E-COP are complete.
a. Any required fields not completed will be returned for resubmission. Notes detailing the missing information will be provided.
b. Once the E-COP worksheets are completed and validated, the information will be forwarded to the E-OBMT for processing. (**Tracked within GitLab**)

5. Administrative Required Training - All administrative permissions requested will require the requested individual to complete the required training module (currently under development) in the SMS-TCX Learning Management System (<https://training.sms.erdcdren.mil>). Once the administrative training is verified, then permissions will be available in the STAGING SANDBOX³.

ONCE INTAKE STEPS 1 - 5 ARE COMPLETED MOVE TO PHASE II - STAGING

¹ The initial data from BUILDER, RAILER, WATERFRONT, etc. used to populate the agency/organization data tables.
² Any tabs/fields highlighted Orange in this Workbook.
³ STAGING SANDBOX - this is the initial location for seed data from all customers.

ESMS Customer Onboarding Packet (E-COP)

Intake → **Staging** → **Production**

1 Initiate Request (User)
2 Kickoff Meeting (User, ESMS Support)
3 **Submit E-COP** (User) **You Are Here**
4 E-COP Review And Approval (User, ESMS Support)
5 Administrative Training (User, ESMS Support)

6 Staging Sandbox (User, ESMS Support)
7 Migration Request (User, ESMS Support)
8 Migration Meeting (User, ESMS Support)

9 Data Migration (User, ESMS Support)
10 Account Configuration (User, ESMS Support)
11 Lifecycle Management (User, ESMS Support)

User ESMS Support

Phase II - Staging Phase II Data Migration Form Phase II Validation Checklist Phase II MFR Phase III - Production Phase III Data Migration Form Phase III Validation Checklist Phase III MFR

Prepare BUILDER Early!

Data Quality eases everything!

Sites and Orgs

- Removal of archive, testing and training data

Assets

- Find and address duplicates / missing RPUID values
- Identify clearly the non-sustained assets

Users

- Disable unneeded users

Any “Non-BUILDER” Data

Add other data during import to ease future integration

- Any Asset elements to bulk load real property?
- Any Component pieces to bulk load from a CMMS?

Non-standard BUILDER fields

Has your agency customized or re-worked any BUILDER fields?

Facility Zip Code == Facility Model Type

“Child Occupied” == Assessment Complete Status

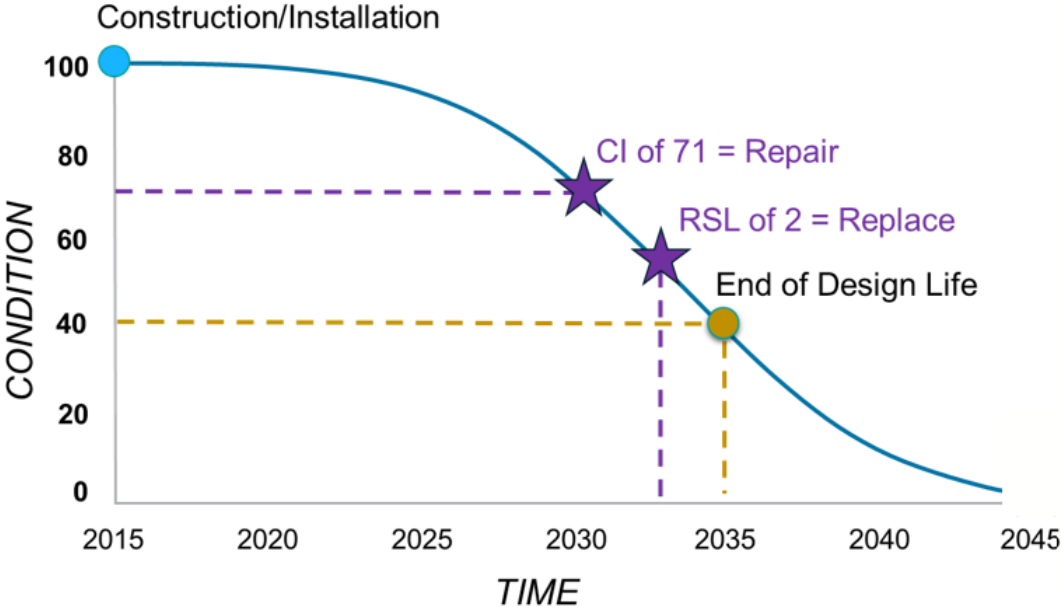
Category Code == FAC Code

Construction Type...

Match BUILDER Work Configuration

Replace

Global Repair



Custom Reports vs Dashboard

SSRS

- Fixed data based on hierarchy
- Limited parameters based on pre-programmed rules
- Export to Excel, Word, **PDF**

PowerBI

- Drill through dashboards
- Dynamically generated data tables, charts and graphs
- Supports bulk data export tables

Import Data to Sandbox

- Import / Export feature
- Field mapping

The screenshot displays the 'Enterprise Sustainment Management System' interface. On the left is a navigation sidebar with options like Domains, Home, Inventory, Assess, Work, Catalog, Reference Books, Administration, Import/Export, Generalized Imports, Documents, and Reports. The 'Import/Export' section is expanded to show 'Import Execution'. The main area shows a list of import jobs. An 'Import Details' modal window is open, providing specific information for a job.

Import Details

| | | | |
|----------------|-----------------------------|----------------|----------------------|
| Type | Generalized | Date Initiated | 11/24/2025, 14:13:45 |
| Initiated By | Ray.L.Butler@erd.c.dren.mil | Status | Completed |
| Date Started | | | 11/24/2025, 20:13:46 |
| Date Completed | | | 11/24/2025, 21:53:28 |

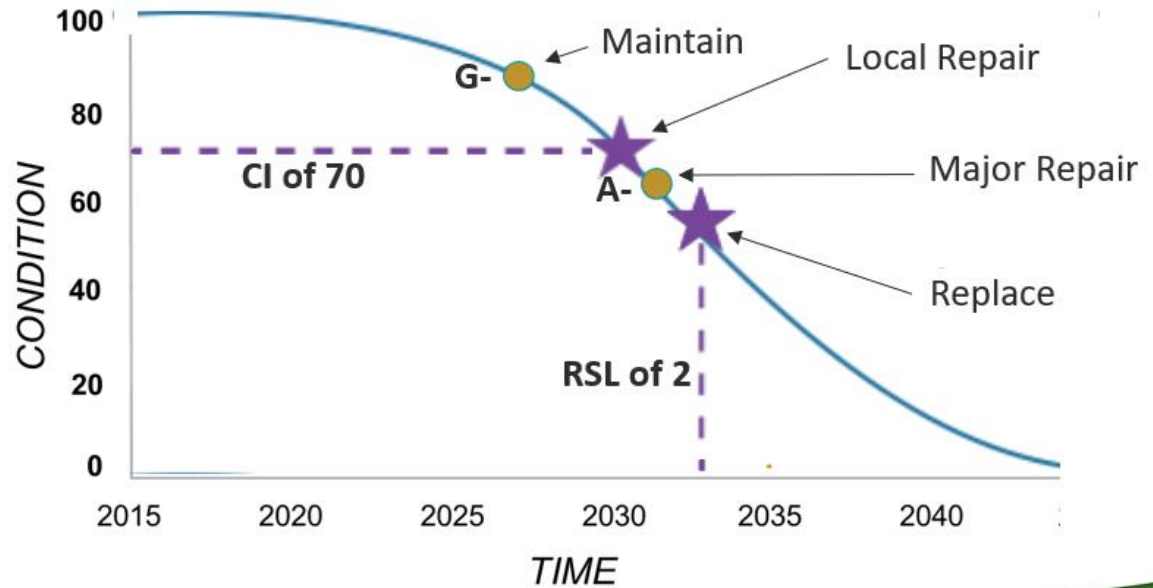
Log Entry

- Starting import.
- Importing from set WMainLine_L into ManagedComponentWithType...
- 5954 records processed from set WMainLine_L, adding 0 and updating 4223 records.
- 5954 records processed from set WMainLine_L.
- Importing from set WServiceLine_L into ManagedComponentWithType...
- Importing from set WControlValve_P into ManagedComponentWithType...
- Importing from set WFitting_P into ManagedComponentWithType...
- Importing from set WHydrant_P into ManagedComponentWithType...
- Importing from set WFireHydrant_P into ManagedComponentWithType...
- Importing from set WMeterPoint_P into ManagedComponentWithType...
- Importing from set WPump_P into ManagedComponentWithType...
- Importing from set WReliefValve_P into ManagedComponentWithType...
- Importing from set WStorageTank_P into ManagedComponentWithType...
- Importing from set WSystemValve_P into ManagedComponentWithType...
- Importing from set WManhole_P into ManagedComponentWithType...

Buttons at the bottom: Show Only Data Errors, Download, Close.

Work Configuration

- Create work configuration



Post Import Data Acceptance

- Check for complete inventory
 - Facilities (RPUID Critical)
 - Components (Overall Count / Price)
- CI Comparisons
 - Average BCI
 - FCI Rollup
- Work Output
 - Work Plans
 - Scenarios

Post Import System Testing

- Verify that those involved can still perform all needed steps.
- Do not accept a system you are not comfortable with

[DD MMM YY]

MEMORANDUM FOR RECORD

SUBJECT: *[Insert Organization]* – cArmy E-SMS PHASE III VALIDATION OF MIGRATION TO PRODUCTION

As the assigned representative for the *[Insert Organization]*, I am verifying that all of the initial requirements and functionality of our data migration of our facilities data into the cArmy E-SMS Production environment has been completed to standard.

The migration has met all of the requirements as identified on the attached Phase III Validation Checklist outlined and agreed upon during the Data Migration Meeting held on *[Insert Date]*.

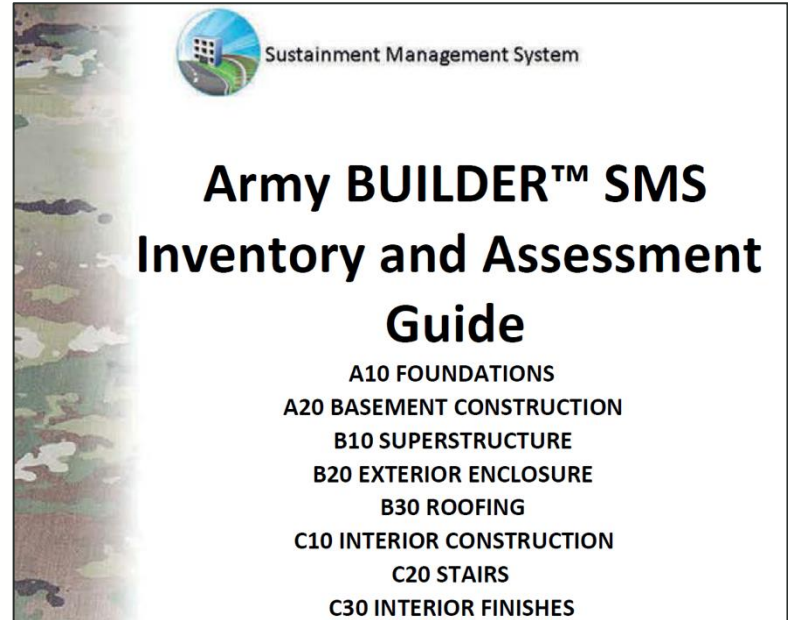
We are satisfied with the current state of our data within the E-SMS Production environment and are ready to go live with full utilization of E-SMS to facilitate our day to day work functions to manage our real property data.

POC for this action is *[Organization POC]*, *[phone number]*, *[email]*.

[Name]
[Title]

Documentation

- Policy documents
- I&A guide update
- Training materials updates
- Reporting
- User setup procedures



Migration to live Production

- Verify that those involved can still perform all needed steps.
- Do not accept a system you are not comfortable with
- Requires change-over scheduled outage

User Permission

- Roles can be different for different orgs / sites
- Separate Workspace (mobile)
Users from Web application Users

| Name | Asset | Inventory | Curator | Work Planner | Assessor | Assessment Supervisor |
|--------------|--------|-----------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Data Curator | NONE | READ | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Researcher | CREATE | CREATE | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Work Planner | NONE | READ | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

E-SMS Permission Overview

This video outlines the available roles in E-SMS and explains key concepts relevant to permissions.

Assigning Permissions Demo

This demo walks through how to assign users permissions at the organization and site scope.

Now let's say you just want to search for

Maximize Organization Benefit

It is not just BUILDER anymore

Learn and create policy around using the new features

Deliberate addition of domains as they come available

New ESMS Asset Fields!

- Exact Construction Date Unknown
- Exact Rebuild Date Unknown
- Description

Create Asset

Name * Domain

Site * CATCODE *

Type Number *

RPUID Quantity *

UOM * Cost Source Computed User Entered

Computed Cost Exact Construction Date Unknown

Construction Year * Exact Rebuild Date Unknown

Year Rebuilt MDI

Operational Status *

Description

Comment

New ESMS Component Fields!

- Exact Repair Date Unknown
- Number
- Cost Overwrite
- Description

The screenshot shows the 'Create Component' form with the following fields and controls:

- Site ***: Select Site button
- Asset Domain ***: Dropdown menu
- Asset ***: Select Asset button with a trash icon
- Type Domain ***: Dropdown menu
- Type ***: Select Component Type button with a trash icon
- Classification**: Select Classification button with a trash icon
- Specification ***: Select Specification button with a trash icon
- Operational Status ***: Dropdown menu
- Quantity ***: Input field
- UOM ***: Dropdown menu
- Exact Installation Date Known
- Installation Date is Approximate
- Year Installed ***: Input field
- Exact Repair Date Known (circled in red)
- Year Repaired**: Input field (circled in red)
- Number**: Input field (circled in red)
- Alternate ID**: Input field
- Cost Source**: Radio buttons for Computed and User Entered (circled in red)
- Computed Cost**: Input field with a note: *Computed Cost requires Classification, Asset, Quantity, and UOM required.*
- Description**: Text area with a slash icon
- Comment**: Text area with a slash icon

At the bottom of the form are three buttons: **Create**, **Create And Navigate To Component**, and **Cancel**.

Asset Assessment Templates

Functionality Index (FI)

- What, if any, BUILDER Asset functional assessments to migrate into ESMS
- What, if any, Asset functional assessment templates to create.
- Testing
 - Do the facility FI scores match expectations?
 - Do the FI roll-ups match expectations?

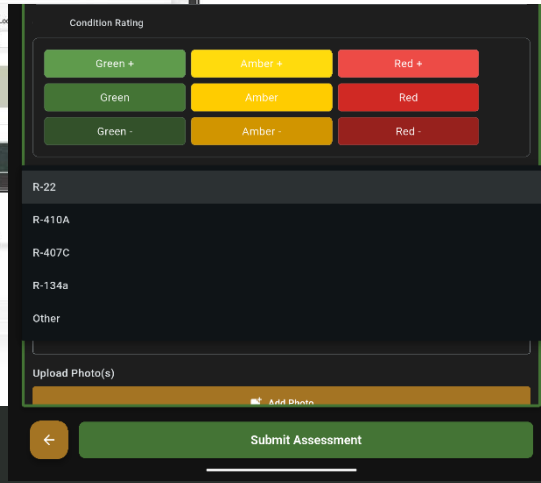
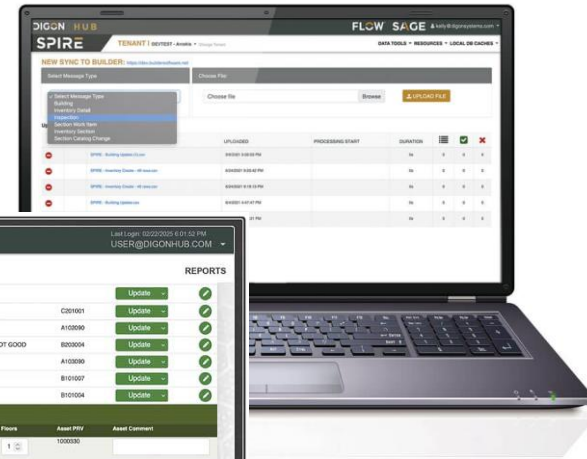
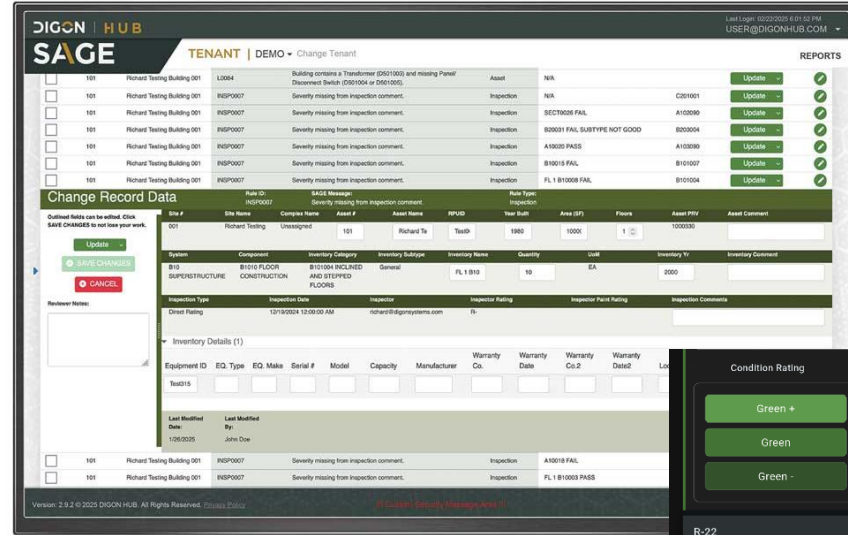
Component Assessment Templates

Condition Index Assessments (CI)

- What, if any, additional questions do you want to ask during a direct rating
- Post Import Testing:
 - Do the new facility CI scores match expectations?
 - Do the new CI roll-ups match expectations?

System Tooling

- QA Tools
- Assessment Tools
- Software Integration
- Report Dashboards



Self-Hosted Systems & CRADA Holders

- Cloud environment requirements
- Learning from ERDC-CERL data migrations
- Ensure migration tools, templates, load scripts and reports are all provided
- Compliance and information security requirements

Thank You



16:00 Central

SUMMIT SOCIAL

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