# SAT 444 User Instructions

**Asset Management Framework**

The SAT survey is based on the Asset Management Framework document developed by MFOA. You can view or download the entire document or each section from the **main page**. The Framework contains detailed explanations for each question in the survey.  This is an excellent place to start if you're new to asset management. If you start with the survey, each question in the survey includes a link to the related area of the document to guide you in determining the appropriate answer for your municipality. You may prefer this method if you are already comfortable with the survey and just want some pointers along the way.

**Step 1 – Login**

Clicking on the SAT 444 link from the MFOA Asset Management Portal will bring up the Login page. Enter your login and password, and click the "Login" button to continue. (Don't have a Login and Password yet? Contact ITCoord@mfoa.on.ca to get one.) Clicking the "Return to Portal" button will take you back to the main portal screen.



**Step 2 – Main Menu**

The main menu screen will give you access to your active surveys and some helpful links. If you are an administrator, you will have access to additional functions as described in the "SAT 444 Admin Instructions" document. The basic Main Menu screen is shown below:

The "Actions" column of the survey list shows the functions available to you for each survey:

- Begin survey (admins only) – If you have not started the survey, this link will allow you to read the disclaimer, set up your assets, and start completing the survey.
- Continue Survey (all users) – If your survey is in progress, this link will take you directly to the table of contents in order to continue answering questions.
- Define Assets (admins only) – if your survey is in progress, this link will allow you to add or remove asset categories.
- Print Questions (admins only) – you can use this link to print a hard copy of the survey questions.
- Results (admins only) – once the survey is completed, this link will show you your municipality's score, and allow you to compare the results to other municipalities in your area, population range, etc. on an anonymous basis.

To the right of the actions list are provided some useful links to help you navigate the survey, including the link to this guide. If you are the administrator for your municipality, you will see additional links to add surveys and manage users.

**Step 3 – Disclaimer (Admins only)**

The first time a survey is accessed, it must be done by an administrator, and the following screen will be displayed. Please read the disclaimer, and if you agree with the terms, click "I Agree (continue to tool).

**Self Assessment Tool**

**Disclaimer / Privacy Statement**

This Self Assessment Tool (SAT) is to assist municipalities in progressing through the ASSET MANAGEMENT continuum.

MFOA may use the SAT results for group analysis. All information or reports based on the SAT will be provided at a summary level with no municipalities individually identified.

MFOA is committed to ensuring that your information is secure. In order to prevent unauthorized access or disclosure, we have put in place suitable physical, electronic and managerial procedures to safeguard and secure the information we collect online.

I Do Not Agree          I Agree (continue to tool)

**Step 4 – Asset Configuration (Admins only)**

After the disclaimer, administrators will be directed to the asset configuration screen. There are two important functions to complete here:

1. Select the assets which exist in your municipality, or the ones which you want to assess.
2. If you have configured multiple users for the survey, you can assign assets to specific users to complete the corresponding or appropriate questions.

The configuration screen is shown below:

Assets are selected by checking to appropriate box to the left of the asset name. (For a description of the asset types, click here.) Users can be assigned by selecting their name from the dropdown to the right of the asset name. When you are done, click "Table of Contents" to move to the next step.

**Step 5 – Table of Contents**

This will be the first screen you see when entering the survey once your assets and user assignments are complete. If you need to change that information, click the "Return to Configuration" button. You will also see some hints at the top of the page to help you, but they are not included in the picture below.

There are three colours (green, blue, and red) which indicate the status of each section of the survey. The status is also displayed as text after each title.

- Sections marked green have been completed. You may still click on the link and review or change your answers if you wish.
- Sections marked blue are partially completed.
- Sections marked Red have not been started.

The main sections (1,2,7-12) are always assigned to the administrator. However, beside each asset in sections 3-6 is the name of the user assigned to complete the section. This could be the administrator or another user who specializes in that type of asset.

**Step 6 – Completing the survey**

Clicking on the link for one of the main sections (1,2,7-12) in the table of contents will take you directly to the survey questions for that section. An example is show below:



The answer for each question is selected by clicking the button to the left of each answer. You may only select one answer for each question. If you have answered the question previously, you previous selection will be displayed by default.

> *Important – Clicking on the small "I" in the blue circle at the end of each question will open a new tab and navigate to the exact location in the Asset Management Framework where that question and its related answers are discussed. This should be your very first step if you are unclear of the question or any of the terms used.*

Clicking on a specific asset within each of the remaining sections will display a similar screen to complete your responses.

However, if you are assigned multiple asset categories, you can click on the main header for any of sections 3-6 and see the screen below:



This method allows you to provide answers for multiple assets. In the example above, the user has been assigned to complete Roads, Bridges and Culverts, and Water asset categories. Doing this can save a lot of time when your various assets are managed in the same way.

**Step 7 – Finalizing the Survey**

When all questions have been completed, a new button, titled "Finalize Survey" will become visible at the bottom of the table of contents. Clicking this button will "lock in" your responses, and allow you to view the various reports available from the main menu. If you click this button by mistake, you must contact ITCoord@mfoa.on.ca to reset the survey for you.