Solutions for Unit Backlog

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ACCOUNTANT
[ac·count·ant]
Someone who does precision
guesswork based on unreliable
data provided by those of
questionable knowledge.
See also: wizard, magician
Agenda

§ Why is this an Issue?
§ What causes the backlog
§ Resolving
  • How to clean up backlog
  • How to prevent backlog from recurring
Is this you?

Who here would consider their unitization backlog

**Manageable**

Approaching

Excessive

in

volume

$$$$

Both

Overwhelming
Impact of Backlog

§ Questionable Reporting
   • FERC Audit
   • State Regulatory Scrutiny

§ Inefficient Processing
   • Manual intervention
   • Unproductive communication

§ Inaccurate Reporting
   • Depreciating in the incorrect utility accounts
   • Delay in retirements being processed causing double recording of deprec
What causes backlog

**Bad Data**
- Incorrect Work order set-up
- Inconsistent charges compared to estimate
- No material detail when not issued from inventory
- Missing data
- Delay in final information from field

**System**
- Late charges have different basis buckets
- Difficult to understand error messages
- Outdated RU catalog
- Interface logic
- Configuration

**Business Process**
- WMS built for different purposes
- Management of material out of stock orders
- Timelines for processing orders
- Workflow errors
- Manual updates
Resolution

Eliminate/Reduce the backlog

§ Analyze backlog based on certain criteria
• Status
• Aging
• $ amount
• Functional area
• Status
• Alert/Error/ARC
• Funding Project

§ What to do with this analysis
• Establish metric goals
• Look at high dollar and then age vice versa
• Look for patterns
• Evaluation criteria
• Modeling solution
• Embed Property Accountant with Project responsible party
Preventing Backlog

**Bad Data**
- Field training
- Blanket Work Orders
- Derivations
- Auto-Unitization

**System**
- Retirements on in-service date
- Tolerances/Alerts
- Invest time in CU mapping updates
- Use of SKUs to map materials to RUs
- Job aide for errors

**Business Processes**
- Involve Procurement, Accounting, and WMS change control
- Operations and interface flow control
- Weekly process
- Leadership and metrics
- Regular Review catalog readiness
Questions?