

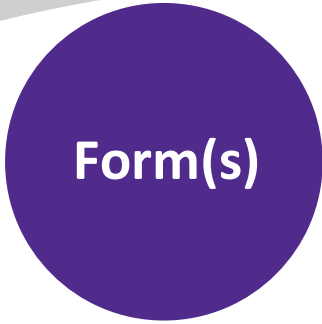


# Asset Management

This custom-built asset management solution allows your organization to maintain and manage your company assets in a user-friendly, dynamic SharePoint site. It provides a single space to register all of your fixed assets, where you can upload photos of the assets, track and schedule maintenance, as well as assign assets to individual staff members. This solution is offered as a fixed-price template, and can easily be customized and enhanced to better suit each business's needs.



365 Solutions Group have developed custom applications within SharePoint for years, and we have packaged up a few of the most commonly requested features into simple bundled applications, which can be added to your existing SharePoint system for a fraction of the cost of developing customized solutions from scratch.



## NEW General Asset form

Asset No \*

Asset Name

Serial Number

Asset Photo [Click here to insert a picture from SharePoint.](#)

Physical Description

Please briefly describe the asset, eg: colour, size, brand/make.

Add-ons

Does this asset have any after market add-ons or upgrades?

Assigned To

Physical Location

Purchased new  Yes  No  
was this asset new when purchased

Buy Date

Buy price

Usage

Expected life

Insurance details

Warranty Details

Requires maintenance  Yes  No  
Does this asset require regular maintenance/Serviceing/Upgrades?

Maintenance Contact

Next maintenance required

Maintenance log

Update each time the asset is upgraded/updated/serviced

Other Asset forms include additional relevant fields (e.g. Last odometer reading for Vehicles, software versions for Devices etc.)

## Asset Management

This bundled solution provides an asset management site containing a complete asset register for a range of organisational assets. Out of the box, this system provides custom forms for general assets, vehicles, devices, machinery, and office equipment. The system allows key staff to locate and manage business assets, as needed, simply and efficiently. It includes processes to track warranty and insurance information, buy price, expected lifespan with upgrade or replacement cycle, and maintenance schedule and logs.

**Asset Management Homepage**

**Quick Links**

- New General Asset
- New Vehicle
- New Device
- New Machinery
- New Office Equipment
- View All Assets
- Maintenance Provider
- Asset Images
- How To Upload Image

**Asset Maintenance Schedule**

Asset Type	Asset Number	Asset Picture	Asset Name	Next Maintenance Req.	Overdue	Maintenance Co.	Maintenance Cont.
Device	TESTING			0			
Machinery	M_IDP_001		HP ID printer	12/12/1992	5,981	Steve Neilson	97 3824 2222
Vehicle	V_TBK_814		Blue Trak truck	21/12/1995	5,207	Mick's Mechanics	1800 111 222
Device	D_LAP_0012		Demey's HP Laptop	21/12/2008	3,758	Productiv	1 800 136 677
Vehicle	V_CAR_1111		CTY_396 Nissan	9/6/2018	363	Knart Tyre and Auto	1 800 712 683
Vehicle	V_CAR_1111		CTY_395 Nissan	9/6/2018	363	Knart Tyre and Auto	1 800 712 683
Machinery	M_DIG_1586		MAC Digger	13/09/2018	175	Mick's Mechanics	1800 111 222
Vehicle	C_CAR_2222		CTY_333 Nissan	13/09/2019	0	Knart Tyre and Auto	1 800 712 683
Vehicle	TESTING VEHICLE		Rank	26/01/2019	0	Mick's Mechanics	1800 111 222

From the landing page above, you immediately see a list of the registered assets that are assigned to the user currently logged in. The buttons in **Quick Links** let you register and manage various types of assets and see a list of maintenance providers' contacts. A list of assets that require upcoming maintenance are highlighted in reddish-pink, prompting a maintenance arrangement or an entry update.

The **View All Assets** lists all asset types and lets you filter specific asset items or different views of the data to fulfill reporting needs.

## Asset Maintenance

Asset Register

Asset Type	Items	Asset Name	Serial Number	Registration number	Phone No or Machi...
Vehicle	C_CAR_2222	CTY_333 Nissan	19UYA315B1L000000	CTY_333	
Device	D_LAP_0012	Kim's HP Laptop	CND148JHRP	LP_00225	



# Functions

## End of Asset Life

The solution calculates the 'Expected End of Life' based on the user entered 'Buy Date' and 'Expected Life' and tells the users when an asset is due for replacement. The 'Expected Life' options can be customized according to your requirements. Assets that are due to replacement will be highlighted in reddish-pink.

Purchased new  Yes  No  
was this asset new when purchased

Buy Date: 15/06/2017

Buy price:

Usage: Daily

Expected life: A - 0 - 6 months (selected), A - 0 - 6 months, B - 6 - 12 months

Vehicle	C_CAR_2222	CTX_333 Nissan	9/03/2018
Vehicle	V_CAR_1111	CTV_395 Nissan	9/03/2018
Machinery	M_DIG_1586	MAC Digger	13/09/2018
Device	D_LAP_0012	Kim's HP Laptop	2/06/2019

A key feature of this bundle system is the ability to schedule and log asset maintenance. This is particularly relevant for Vehicles and Machinery assets, and can also be applied to Devices, Office Equipment and General Assets.

The solution provides a single place for your to record the full information of **Maintenance Contacts** that perform maintenance on your assets, which can be internal staff, manufacturers or third part organizations like the local mechanic. These contacts can then easily be associated to multiple assets through tags when adding or editing an asset, so when it is time for an asset to be maintained, the contact of the responsible party is easily searchable.

+ new item or edit this list

All Assets All Devices Maintenance Find an item

Content Type	Asset No	Asset Name	Next maintenance required	Maintenance Contact	Maintenance Contact:Contact number	Maintenance Contact:Email
Device	D_LAP_0012	Demo's HP Laptop	13/08/2017	Productiv	1300 136 677	support@productiv.com.au
Machinery	M_3DP_001	BNE 3D printer	26/09/2017	Steve Neilson	07 3824 2222	steve@contoso.com.au
Device	D_LAP_0012	Tristram's Dell Laptop	6/10/2017	Productiv	1300 136 677	support@productiv.com.au
Vehicle	V_TRK_896	Orange Dump truck	12/11/2017	Pillyroo manufacturing	07 1234 5678	helpme@pillyroo.com
Vehicle	V_TRK_814	Blue tray truck	12/01/2018	Mac's Mechanic	13 Car Car	info@macsmechanic.com.au
Vehicle	V_CAR_1111	CTV_396 Nissan	9/03/2018	Kmart Tyre and Auto	1300 770 693	Brisbane@kmartyres.com.au
Vehicle	C_CAR_2222	CTX_333 Nissan	9/03/2018	Kmart Tyre and Auto	1300 770 693	Brisbane@kmartyres.com.au
Vehicle	V_CAR_1111	CTV_395 Nissan	9/03/2018	Kmart Tyre and Auto	1300 770 693	Brisbane@kmartyres.com.au
Machinery	M_DIG_1586	MAC Digger	9/09/2018	Mac's Mechanic	13 Car Car	info@macsmechanic.com.au

The assets on the **Asset Maintenance Schedule** are listed in order of 'Next Maintenance Date', the earliest date appearing at the top. By default, 7 days (customizable) prior to the 'Next Maintenance Date', the 'Assigned To' staff members (or specified users) will receive an email notification informing them that the Asset is due for maintenance. If 'Next Maintenance Date' is passed, the asset will be highlighted in reddish-pink for the staff to easily identify and arrange actions. Once the maintenance is completed, the staff can then update the asset by clicking the 'Asset Name' to open the full asset editing form and log the maintenance. The process is all organized in one place and all the details of the maintenance history are easily accessible.

Maintenance Contact: [Mac's Mechanic](#)

Next maintenance required: 12/01/2018

Maintenance log:

- Kim Brian (15/06/2017 4:18 PM): Breaks checked 1/2/2017
- Kim Brian (15/06/2017 4:18 PM): Full Service 12/04/2017

Maintenance Contact:Contact number: 13 Car Car

Maintenance Contact:Email: info@macsmechanic.com.au

Expected end of life: 2/06/2021

A simple and efficient solution making it easy to add and manage assets, log maintenance and access asset life expectancy.

## SharePoint Asset Management

This **complete bundle** includes SharePoint site collection feature configuration, installation of subsite, configurations of library to page connections, user permission levels (management vs. staff), testing and project management. The **Optional Additions** as listed on the right can be included for an additional fee. Restrictions and limitations apply. Further changes and associated costs can be discussed upon expression of interest.

## Assumptions / Restrictions

- To purchase this bundle solution, you must have an existing SharePoint online environment and configured Office 365 users
- A login must be provided to 365 Solutions Group developers with full global admin rights within your tenant for duration of the build
- A 365 Solutions Group work order must be issued, reviewed and signed by an authorized agent prior to work commencing on the solution
- Unless branding addition is purchased, the navigation, colour scheme and overall branding of the SharePoint site will remain the same as your current SharePoint's, and may look different than the screenshots in this document
- The list of staff is populated by the Office 365 users list. Therefore, assigned assets can only be assigned to a single user login
- There are specific features in the backend of SharePoint (such as 'Publishing') that must be configured specifically to ensure a smooth installation. If your SharePoint environment is already highly customised or includes other add-ins, certain features may be conflicting, however any risks can be evaluated or confirmed before purchase

## Bundle Inclusions

This Asset Management bundle includes the following:

- A new Asset Management site added to your SharePoint site
- A cleanly designed home page as above with Quick Links to access the pre-configured forms and reports
- Custom forms for each of the different Asset Types including General Asset, Vehicle, Device, Machinery, and Office Equipment
- A configured Asset Register list
- All Views/Reports listed above
- Highlighting on assets that requires maintenance
- A Maintenance Contacts list
- Email notification workflow
- Custom ability to resize images when adding them to assets
- 'How to upload asset images' page linked from home page
- Specific management guide and user guide

## Optional Additions

The following will incur additional costs if desired:

- Custom form fields/columns
- Additional Red/Green/Yellow status icons in the maintenance reports
- Additional email alert workflows
- Additional Asset Types
- Additional report views
- Custom permissions for the different Asset Types or Reports
- Approval process for addition of assets to register
- Additional training
- Branding

## Questions?

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