

Asset Management Application Support Document

Overview

The Asset Management Application, built with **Power Apps** and **SharePoint**, provides a centralized and secure platform for managing assets throughout their lifecycle. This support document covers the application's key features, user roles, and guidance on common tasks, helping users effectively track, assign, maintain, and dispose of assets within the organization.

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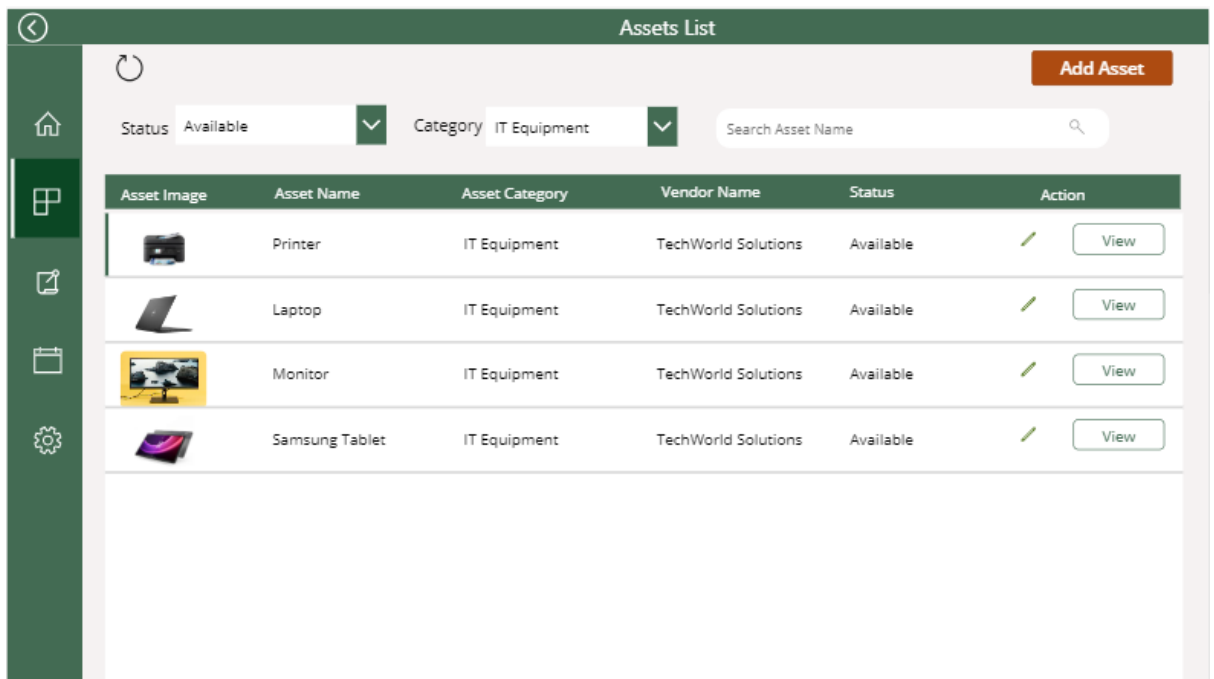
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1. Application Features









Central Asset List

The Central Asset List that holds detailed records of each asset, including:

- **Asset Type:** Categorizes the asset (e.g., Furniture, IT).
- **Condition:** Tracks the current state of the asset.
- **Purchase Date:** Documents when the asset was acquired.
- **Location:** Specifies where the asset is located within the organization.



The screenshot shows a web application interface titled "Assets List". It features a dark green sidebar with navigation icons (home, list, add, calendar, settings). The main content area has a header with a refresh icon, a status dropdown set to "Available", a category dropdown set to "IT Equipment", and a search bar labeled "Search Asset Name". An "Add Asset" button is in the top right. Below is a table with columns: Asset Image, Asset Name, Asset Category, Vendor Name, Status, and Action. The table lists four assets: Printer, Laptop, Monitor, and Samsung Tablet, all from TechWorld Solutions and in Available status. Each row has a pencil icon and a "View" button.

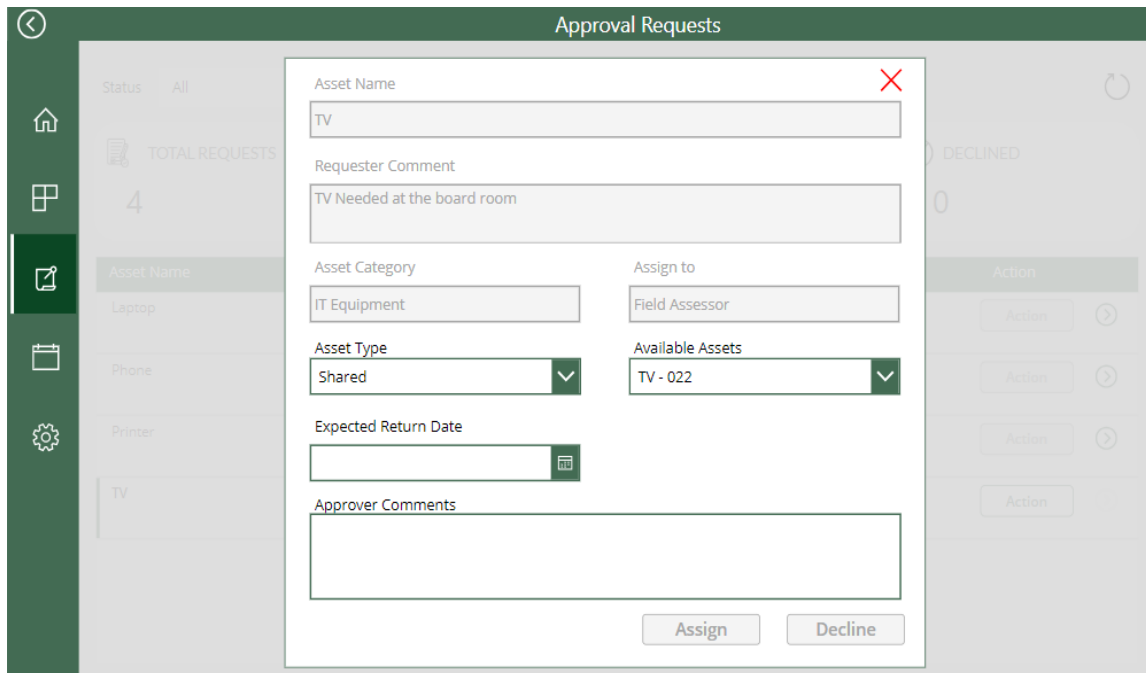
Asset Image	Asset Name	Asset Category	Vendor Name	Status	Action
	Printer	IT Equipment	TechWorld Solutions	Available	 View
	Laptop	IT Equipment	TechWorld Solutions	Available	 View
	Monitor	IT Equipment	TechWorld Solutions	Available	 View
	Samsung Tablet	IT Equipment	TechWorld Solutions	Available	 View

This feature provides a quick and organized way to locate and manage assets.

Asset Assignment Tracking

Assign assets to specific employees, offering transparency over who is responsible for each asset. Key details include:

- **Real-Time Assignments:** Updates the status as assets are assigned or reassigned

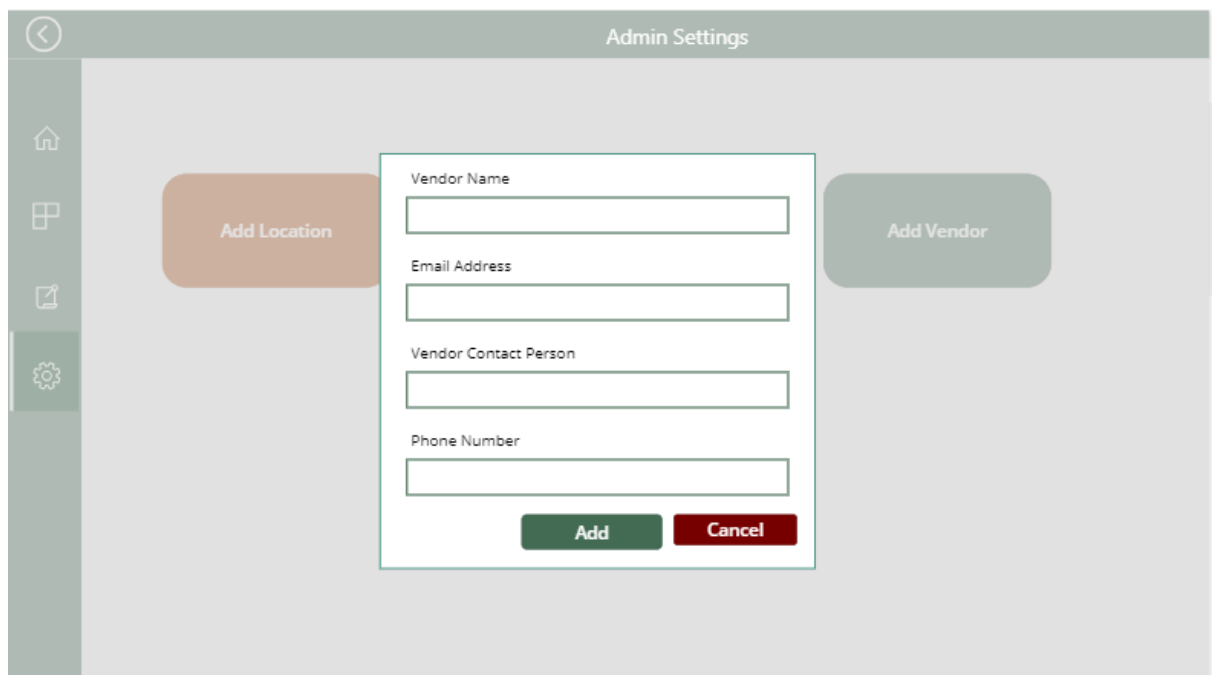


- **Accountability:** Helps track responsibility for assets, minimizing risk of loss.

Vendor Information

The application allows storage and management of vendor information to streamline relationships and contract tracking, including:

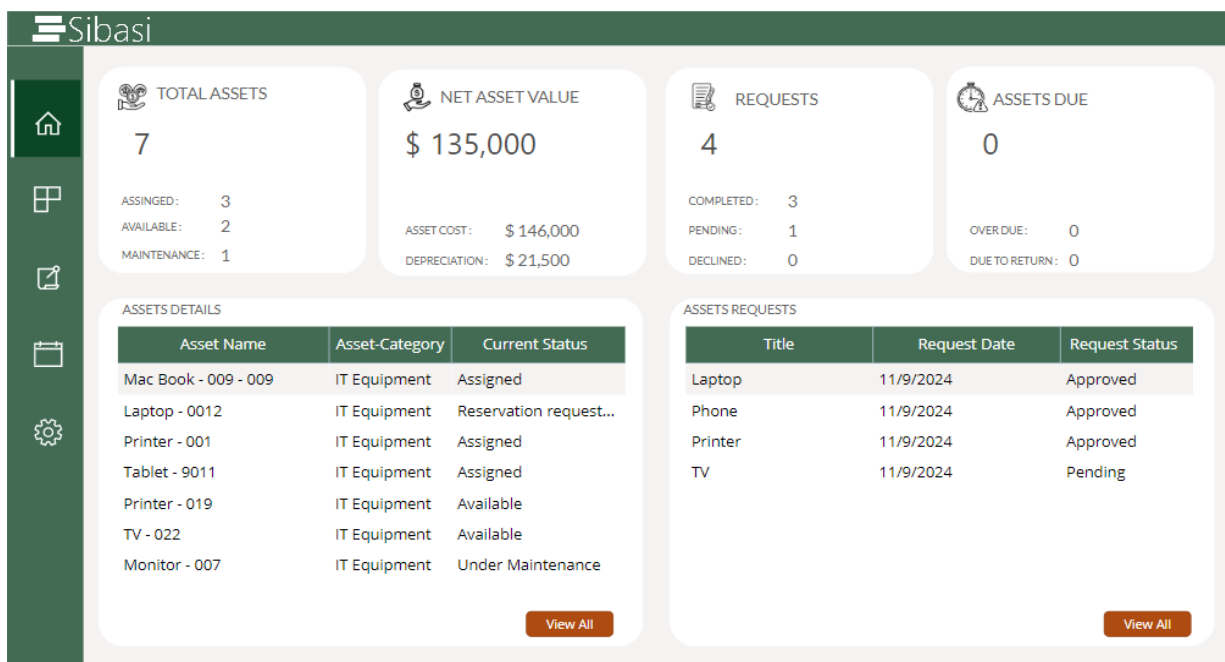
- **Contact Details:** Vendor phone, email, and address.



Reports and Insights

Generate insights and visual reports on asset usage, condition, maintenance, and availability:

- **Asset Performance:** Usage and depreciation reports.
- **Maintenance History:** Track maintenance costs and trends.
- **Asset Availability:** View which assets are currently available or in use.



Automated Workflows

Automate tasks with **Power Automate** integration to streamline processes, such as:

- **Approvals:** Asset disposal or transfer requests.
- **Maintenance Scheduling:** Automated notifications for maintenance needs.
- **Service Request Routing:** Automatically assigns requests to the appropriate team or individual.

Secure Access Control

Role-based access ensures that only authorized personnel can view or edit asset data, protecting sensitive information:

- **Admin Access:** Full control of all features.

The dashboard provides a comprehensive overview of the organization's assets and requests. It features four main summary cards at the top, followed by two detailed tables for assets and requests.

ASSETS DETAILS		
Asset Name	Asset-Category	Current Status
Mac Book - 009 - 009	IT Equipment	Assigned
Laptop - 0012	IT Equipment	Reservation request...
Printer - 001	IT Equipment	Assigned
Tablet - 9011	IT Equipment	Assigned
Printer - 019	IT Equipment	Available
TV - 022	IT Equipment	Available
Monitor - 007	IT Equipment	Under Maintenance

ASSETS REQUESTS		
Title	Request Date	Request Status
Laptop	11/9/2024	Approved
Phone	11/9/2024	Approved
Printer	11/9/2024	Approved
TV	11/9/2024	Pending

- **Manager Access:** Access to request.

The Requests page allows managers to view and manage incoming requests. It includes a search bar, a status filter, and summary cards for request counts by status. Below these is a detailed table of requests with action buttons for each.

Asset Name	Asset Category	Requested by	Status	Action
Laptop	IT Equipment	Field Assessor	Approved	Action
Phone	IT Equipment	Field Assessor	Declined	Action
Printer	IT Equipment	Field Assessor	Approved	Action
TV	IT Equipment	Field Assessor	Pending	Action

- **Employee Access:** Limited view and request access.

Dashboard

TOTAL ASSETS
 1
 DEDICATED: 0
 SHARED: 0

REQUESTS
 4
 APPROVED: 2
 PENDING: 1
 DECLINED: 1

ASSETS DUE
 0
 OVER DUE: 0
 DUE TO RETURN: 0

RESERVATIONS
 1
 APPROVED: 1
 PENDING: 0
 DECLINED: 0

MY ASSETS

Title	Assigned Date	Asset Category
Printer	11/9/2024	IT Equipment

[View All](#)

MY REQUESTS

Title	Request Date	Request Status
Laptop	11/9/2024	Approved
Phone	11/9/2024	Declined
Printer	11/9/2024	Approved
TV	11/9/2024	Pending

[View All](#)

Action History

All actions taken in the application, such as asset assignments or modifications, are logged in the **Action History** for accountability and transparency.

Assets Details

[Check out Maintenance](#) [Dispose Asset](#) [Print Asset details](#)

ASSET DETAILS

ASSET IMAGE

ASSET NAME Monitor - 007
CATEGORY IT Equipment
MODEL HP
PURCHASE DATE 11/10/2024
PURCHASE PRICE 7000
VENDOR NAME OfficeSupplies Co
SERIAL NUMBER 007
WARRANTY EXPIRY DATE 11/10/2026
CURRENT VALUE 0
DEPRECIATION VALUE 0
STATUS Under Maintenance

ASSET HISTORY TABLE

ACTIONER	ACTION DATE	ACTION STATUS	CURRENT USER
Rebecca Anyangu	11/10/2024	Created	
Rebecca Anyangu	11/10/2024	Maintenance Initiated	

2. User Roles & Permissions

Admin

- Full access to all application features.
- Ability to add, update, and delete asset records.
- Manages user roles and permissions.
- Access to reports and vendor information.
- Can submit maintenance requests and assign assets
- Can approve asset reservation

Manager

- Can view and approve assets requests.

Employee

- Limited access to view asset information.
 - Can request asset assignments and view assigned assets.
 - Cannot modify or delete asset records.
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3. Getting Started

Accessing the Application

1. **Log in** with your organizational credentials.
2. Ensure you have the appropriate permissions based on your role (Admin, Manager, Employee).

User Interface Overview

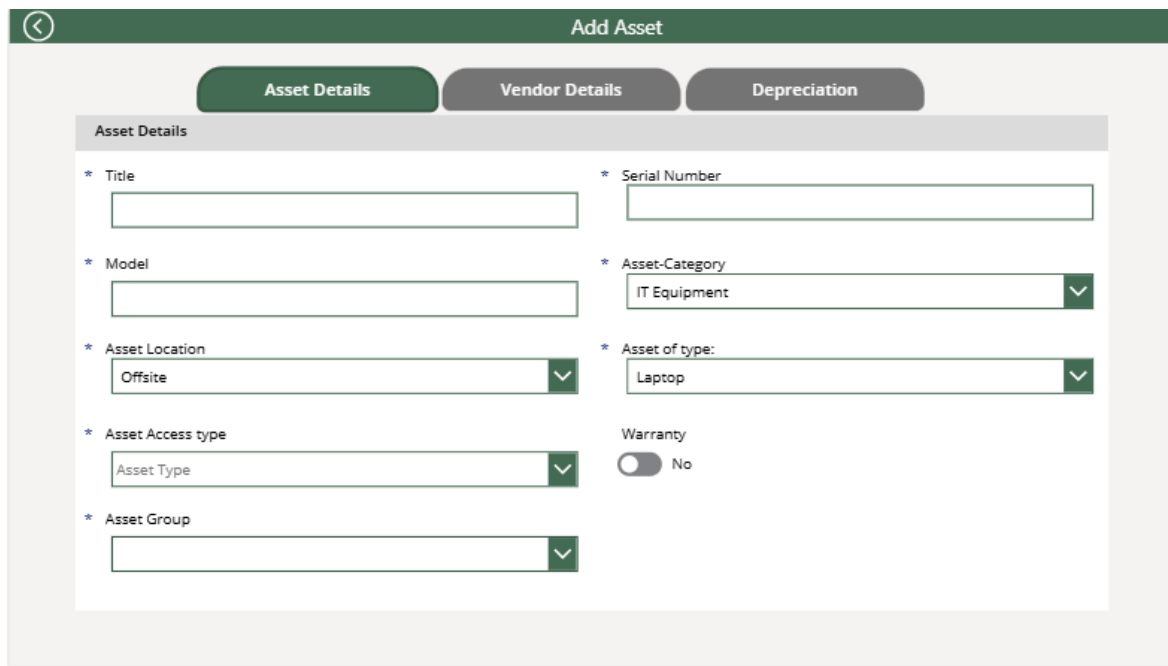
The application interface is organized into modules, including:

- **Dashboard:** A quick overview of total assets, assignments, and pending tasks.
- **Assets:** List view of all registered assets with filter and search options.
- **Reports:** Access various reports and insights on asset utilization and maintenance.
- **Workflows:** Automated processes for approvals, maintenance, and asset requests.

4. How to Use Key Features

Registering a New Asset

1. Go to **Assets > Add New Asset**.
2. Fill in required fields (asset type, purchase date, serial number, etc.).
3. Click **Save** to register the asset.

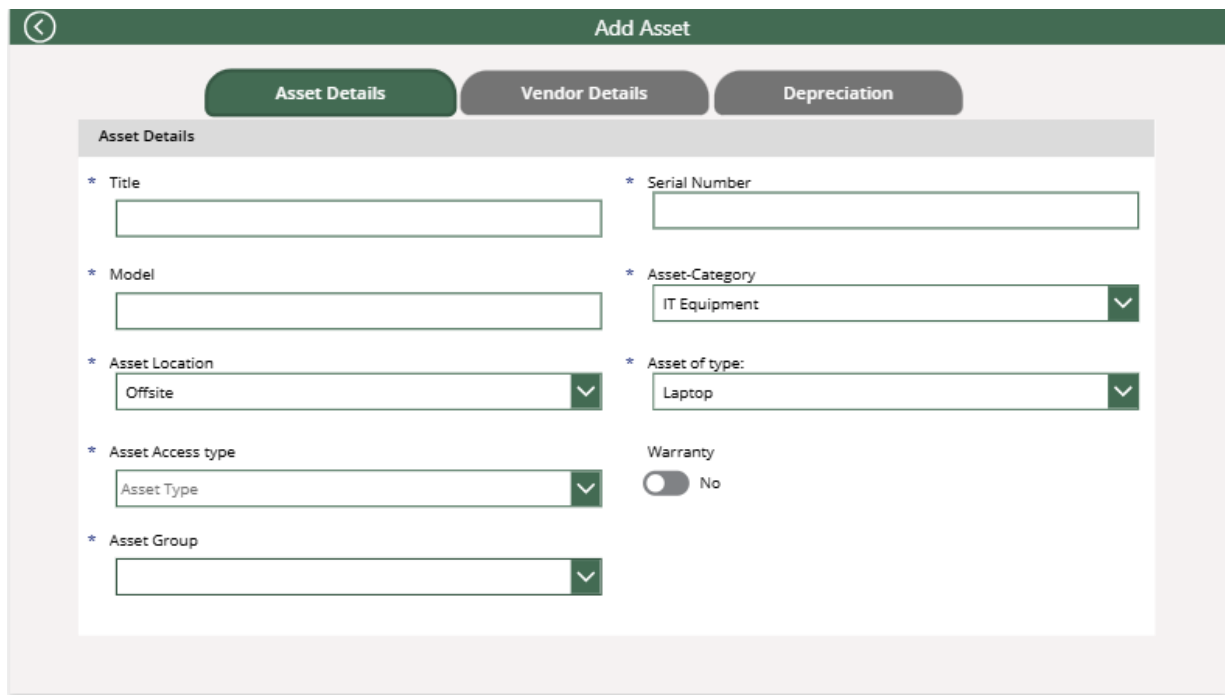


The screenshot shows the 'Add Asset' form with the following fields and values:

- Title**: (Empty text input)
- Model**: (Empty text input)
- Asset Location**: Offsite (Dropdown menu)
- Asset Access type**: Asset Type (Dropdown menu)
- Asset Group**: (Empty dropdown menu)
- Serial Number**: (Empty text input)
- Asset-Category**: IT Equipment (Dropdown menu)
- Asset of type**: Laptop (Dropdown menu)
- Warranty**: No (Toggle switch)

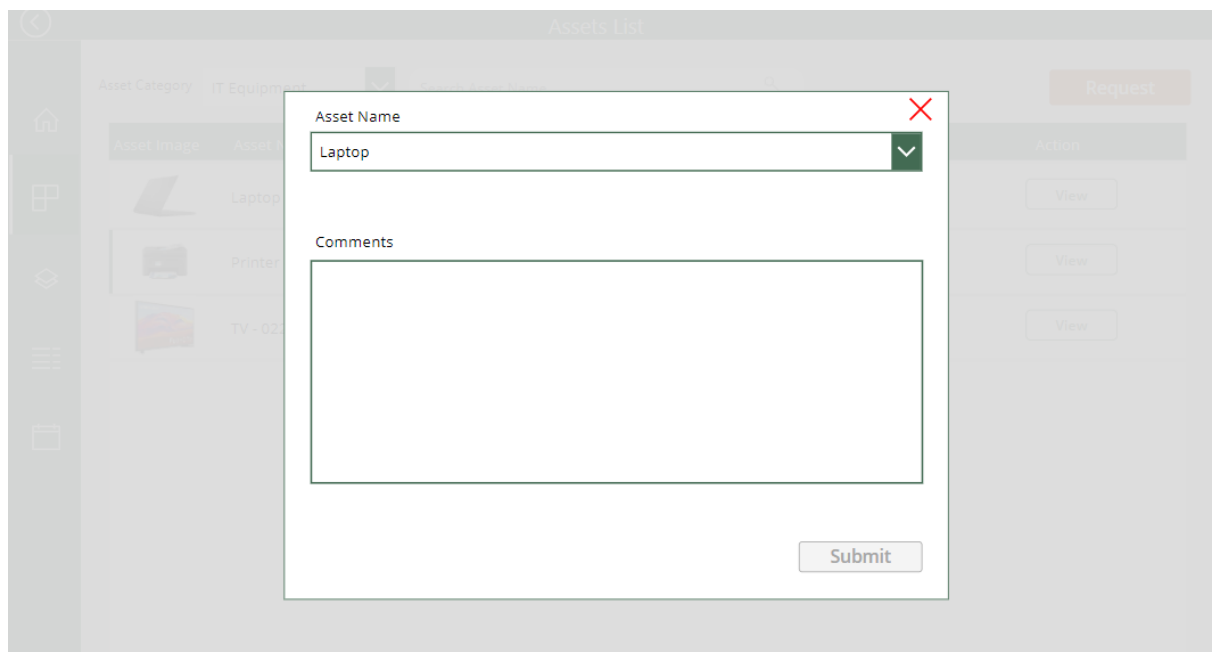
Updating Asset Information

1. Navigate to **Assets** and select the asset to update.
2. Click **Edit** and modify fields as needed (e.g., condition, location).
3. Save changes to update the asset record.



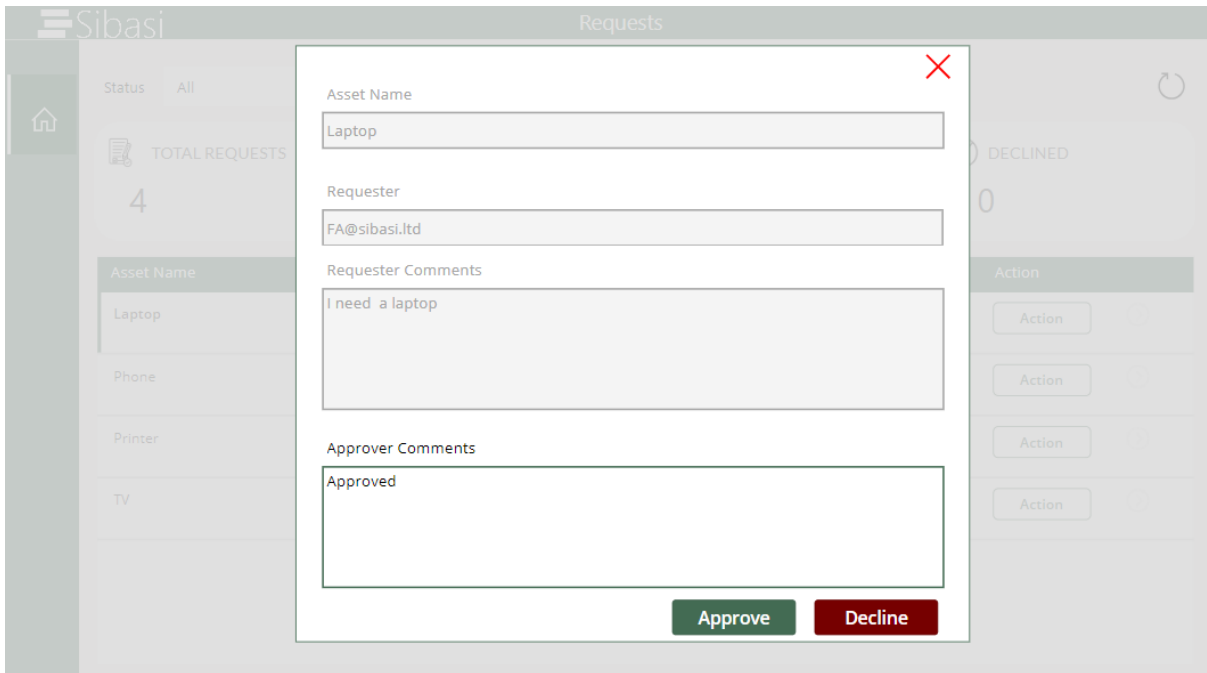
Creating a new Asset request

1. Go to **Assets > Request**.
2. Select the type of asset and enter comments (model of the asset or any specification).
3. Click **Submit** to request the asset.



Assigning Assets

1. Go to **Approval request** and select **Request**.
2. Choose the asset and assign it to an employee.
3. Set a due date if the asset is being borrowed and confirm the assignment.



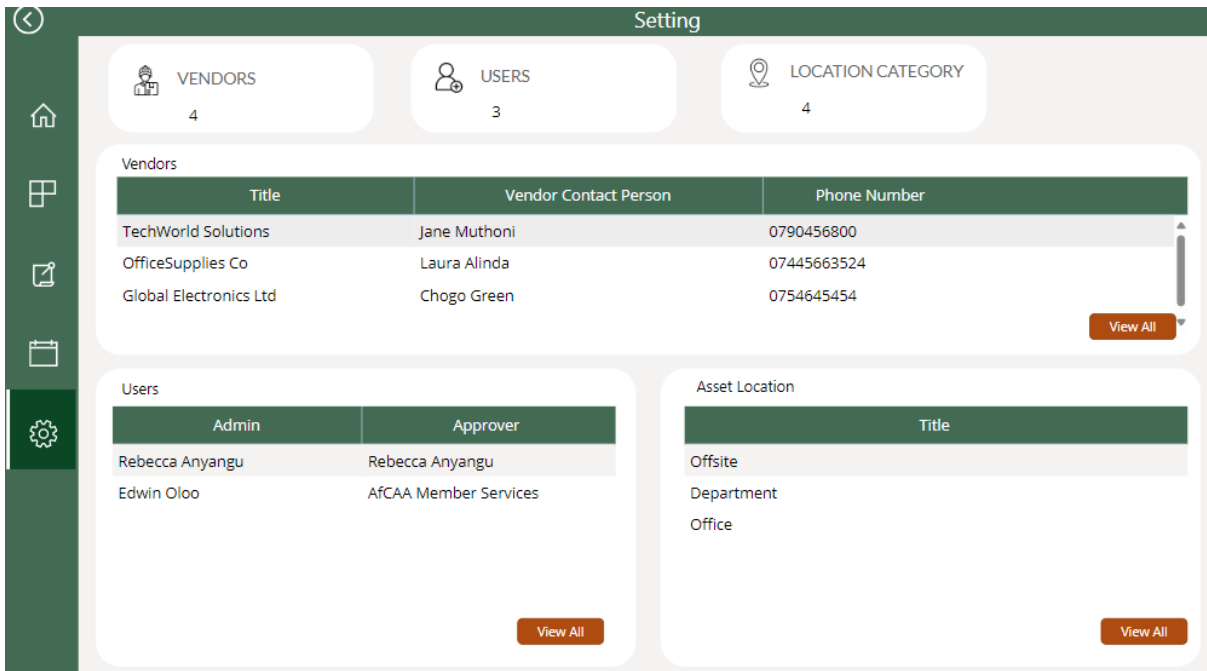
The screenshot displays the 'Requests' page in the Sibasi application. A modal window is open for approving a request. The modal contains the following fields and actions:

- Asset Name:** Laptop
- Requester:** FA@sibasi.ltd
- Requester Comments:** I need a laptop
- Approver Comments:** Approved
- Buttons:** Approve (green) and Decline (red)

The background shows a sidebar with a home icon, a status filter set to 'All', and a 'TOTAL REQUESTS' section showing a count of 4. Below this is a table of assets with columns for 'Asset Name', 'Phone', 'Printer', and 'TV'. The 'Laptop' row is highlighted. On the right side of the background, there is a 'DECLINED' section with a count of 0 and a list of 'Action' buttons.

Managing Vendor Information

1. Access **Vendor Information** from the setting page.
2. Click **View all** then **Add Vendor**.
3. Enter contact details and save.



Setting

VENDORS 4 USERS 3 LOCATION CATEGORY 4

Vendors

Title	Vendor Contact Person	Phone Number
TechWorld Solutions	Jane Muthoni	0790456800
OfficeSupplies Co	Laura Alinda	07445663524
Global Electronics Ltd	Chogo Green	0754645454

[View All](#)

Users

Admin	Approver
Rebecca Anyangu	Rebecca Anyangu
Edwin Oloo	AfCAA Member Services

[View All](#)

Asset Location

Title
Offsite
Department
Office

[View All](#)

Generating Reports

1. Open **Reports & Insights**.
2. Select the report type (e.g., Requests, Asset details).

Automating Workflows

1. Open **Workflows** and choose the task you wish to automate (e.g., approval requests).
2. Define rules and conditions for automation, such as manager approval for disposal.
3. Enable notifications to keep users informed.

Viewing Action History

1. Go to **Action History** under **Assets**.
2. Search or filter by asset name, date, or user to view past actions.
3. Review logged actions for a transparent record of asset activity.

5. FAQs

Q: Who can access vendor information?

A: Only Admins and Managers have access to the Vendor Information section.

Q: Can I automate the asset maintenance schedule?

A: Yes, you can set up automated reminders for asset maintenance through the Workflows module.

Q: How do I request asset disposal?

A: Employees can submit disposal requests through the Asset Management module, which are then routed to the Manager or Admin for approval.

6. Support Contact Information

If you encounter issues or have questions, please contact the Asset Management Support Team:

- **Email:** info@sibasi.ltd
- **Phone:** +254-780742274