# Asset Management

## Enter the asset details for different types of assets

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Asset Type** | **Category** | **Data to be captured** | **Procurement Data** |
| 1 | Desktops  Laptops  Thin Clients  Servers | Computers | Mother Board  Processor  RAM  Hard Disk Capacity | Asset ID  Trust  Date of Purchase  Purchase Order Ref.  Invoice Number  Warranty Date |
| 2 | Monitors  Printers  Scanners  Biometric Machines | Accessories | Make  Specification  Description |
| 3 | External Hard Disk  Pen Drive  Storage Units | Storage | Make  Specification  Description |
| 4 | Switches  Routers | Network | Make  Specification  Description |

## Allocate the assets to a user / department.

Select the asset to be allocated from the list of assets.

Select the user to whom the asset needs to be allocated.

Capture the following details:

* Location where the asset need to be deployed.
* Date of Allocating the Asset to the user.

Ideally, each asset is assigned to a single user. But there may be cases where a specific asset can be assigned to more than one user. For example, in preachers’ cabin, each cabin has a system which is used by 2 or 3 preachers. The asset can also be assigned to a department (like common laptop used by HR department for making induction presentations.)

## Return the assets released by the users to the store

The asset is taken back into stock with the release date (the date on which the user / department has released the asset to be taken into IT stock). The asset returned should be shown in IT stock.

## Scrap the assets that are not usable any more

If any asset is coming to stock and it is not in working condition then that asset should be sent to scrap. The reason for scraping the asset should be captured.

## Track the asset movements

The asset movement has to be captured in the following scenarios:

Asset can be transferred from one user to another user. The system allocation procedure has to be followed. Capture the following details:

* Location where the asset need to be deployed.
* Date of Allocating the Asset to the user.

Asset can be shifted from one location to another location. In this case capture the asset location and the date of shifting the asset.

## View the asset inventory

The user can view the list of assets in the inventory.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Asset Type** | **Category** | **Information to be displayed** | **Procurement Data** |
| 1 | Desktops  Laptops  Thin Clients  Servers | Computers | Trust  Asset ID  User ID  IP Address  Processor Type  RAM  Hard Disk  Status | Asset ID  Stock  Status  Allocated to  Allocated On  Released On |
| 2 | Monitors  Printers  Scanners  Biometric Machines | Accessories | Trust  Asset ID  User ID  Description  Make  Specification  Status. |
| 3 | External Hard Disk  Pen Drive  Storage Units | Storage |
| 4 | Switches  Routers | Network |  |

## Search asset based on various parameters

The asset details can be searched based on the various parameters such as:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Asset Type** | **Category** | **Specific Parameters** | **Common Parameters** |
| 1 | Desktops  Laptops  Thin Clients  Servers | Computers | Processor  RAM Capacity  Hard Disk Capacity | Asset ID  User ID  User Name  Trust  Department  Asset Status |
| 2 | Monitors  Printers  Scanners  Biometric Machines | Accessories | Trust  Description  Make  Specification  Status |
| 3 | External Hard Disk  Pen Drive  Storage Units | Storage | Trust  Make  Specification  Status |
| 4 | Switches  Routers | Network |  |

## Calculate depreciation & book value of assets

The depreciation book of asset has to be calculated in every financial year.

To calculate the depreciation value of asset, purchase date and invoice value of asset is required.

In IT, the asset will be depreciated with 60% of its original value every year.

## Dispose the assets that are in scrap

If any asset is coming back to stock and it is moving to scrap location, then that asset should be disposed in an eco-friendly manner. The asset disposal date should be captured.

# Stores Management

## View the inventory

The stores in charge can view the inventory. The below details has to be displayed:

* Trust to which the item belongs to
* Item Code, Name
* Quantity Available in Stock
* Rate (the rate is computed using weighted average method)

## Issue the Item to the User

The stores in-charge receives indents from the users / technicians and issues the item. For every indent received a ticket is generated. The ticket is closed once the item is issued.

The user acknowledges the receipt of the item by signing in the item issue register. Each entry in the item issue register is given a unique serial number which is captured as the reference number.

The below details need to be captured.

* Name of the Requestor
* Date of Issue
* Department to which the user belongs to (to generate debit notes at the end of month)
* Quantity issued
* Reference Number
* Ticket Number, Ticket Date
* Asset Id (if the item is issued to replace any component of an asset)
* Remarks

## Receive the Item into Store

Stores receives the item in two ways: (a) Item Receipts (b) Item Returns.

**Item Receipts:** Items delivered by the vendor. The stores in-charge verifies that the items are delivered by the vendor as per the specifications mentioned in the purchase order and acknowledges the receipt of the item by signing in the delivery challan or the copy of the invoice.

**Item Returns:** Items issued to the users which are returned to the stores. If the item is in usable condition, then it is taken into secondary stock. If the item is not in usable condition, it is scraped.

The following details are updated:

* Trust (to which the item belongs to)
* Item Returned by the user
* Date of Receiving the item
* User who returned the item (for secondary stock) / Vendor who delivered the item
* Quantity Received
* Rate (in case of secondary stock, the rate = 0)
* Remarks

# User Management

## Create a user and update his details

If any request form will come to service desk to create the user then service desk has to take the approval from IT head and has to submit the form to IT admin then It admin can create the user. The below details has to be updated:

* User ID
* Name
* Date Of Joining
* Mobile Number
* Office Extension
* Category
* AD Login ID
* Designation
* Entity Code
* Trust
* Division
* Unit
* Reporting to
* Department
* Remarks

# User Self Service

## View all the assets allocated

In IT, if any asset is allocating to the user then that details have to be updated. User can see the asset allocated details.

The below details has to be displayed:

* Trust
* Asset Id
* User
* IP
* Code
* Status
* RAM
* Hard Disk

## Raise a request

If any request has raise from the user to IT then service desk has to assign the request to IT engineers. IT engineer has to do the first level investigation within one hour and try to resolve the issue with in SLA. If IT engineer fails to resolve the issue with in SLA then he has to update the proper comment in service desk then he has to approach his senior for resolution. These details have to be updated.

## View all tickets raised and the status of it

User can view the request which is raised. The below ticket details has to be captured:

* Request ID
* Requester
* Department
* Category
* Subcategory
* Item
* Subject
* Created Time
* Completed Time
* Technician
* Request Status
* Request Mode

## Participate in the surveys

User can participate in the surveys.

After participating the survey result has to be displayed.

## Access IT Policies and Guidelines

User can access the IT Policies and Guidelines.

## View my access rights (login, email, internet)

As per the user role the screen has to be displayed.

# Access Management

## Update the AD Login and related details of the user

User can update the AD (Active Directory) Login details.

## Update the email id of the user

In IT if any request will come to create / update email id with the approver then email id has to be created / updated. The below details has to be captured:

|  |  |
| --- | --- |
| **Information to be added** | **Information to be displayed** |
| Trust  Employee Name  Display Name  Email Id  Secondary Email Id  Group Name  OWA Access  Created On  Department  Designation  Office Phone  Mobile Number  City  State  Country | Name  Email Id  Employee ID  OWA  Mobile  City |

## Update details of email groups that the user belongs to

Email id has to be categorized as their respective groups.

If it is outside the Bangalore then it has to be defined as # everyone - HKM and others has to be defined as their respective department groups.

## Update the internet id of the user

As per the request the internet id has to be updated. The below details has to be updated:

* Trust
* Employee Name
* Group Name
* Created On
* Employee Name
* Department
* Designation

# Network Administrator

## Manage the IP address Inventory

Administrator can update the IP address details.

All the allocated / not allocated IP address detail has to be captured.

## Allocate IP address to the devices in the network

User can allocate the IP address to the devices in the network.

The below details has to be displayed:

* IP Address
* Device
* Trust
* Asset Id
* Name

## Track the MAC binding of Devices to Network Ports

Network Administrator has .

# Service Desk

## View all the calls logged by the user / engineer / system

Calls status has to be captured.

All calls should be resolved before reaching to SLA.

## Assign the calls to the engineers

If any request is coming or raised from the user then service desk has to assign the request to the engineers.

## Prioritize & Categorize the calls

Based on the call category service desk has to assign the call category with respected levels: (L1 / L2 / L3 / L4).

Based on the priority service desk has to assign the priority (Low / Medium / High / Critical).

# System Administrator

## Log Calls connects to the system and security events

User can log the calls connects to the system and security events.

# Vendor Management

## Create a vendor and update his details

The purchase executive can create a vendor card and update the vendor details. The system generates a vendor code and captures the name of the vendor, address of the vendor, website URL and the status. The vendor account gets activated only when the first purchase is made.

## Create Vendor Contact

The purchase executive can create the vendor contacts to capture the name of the contact person, designation, mobile number, email id and few remarks. The contact status can be marked as active / inactive.

## Create the Contracts entered with Vendors

The purchase executive can add the contract details.

* Contract Type
* Description
* Effective Date
* Next Renewal Date
* Contract Value
* Vendor (the vendor should be active)
* Contract Owner
* Mobile Number / e-Mail ID of the Contract owner
* Signatory for the Contract
* Contract Document (to be uploaded)
* Remarks (renewal procedures, escalation procedure etc.)

## Follow-up for processing renewal

The purchase executive can see the list of contracts (Vendor Name, Contract Type, Effective From, Due for Renewal On, Contract Owner) and the contracts that are due for renewal within a month are marked with red flag to trigger action from purchase executive. The system can automatically send an email to the purchase executive & contract owner a week prior to the renewal due date.

## View the vendor details

User can view the vendor details.

User can update the purchase order details in vendor card.

The below details has to be displayed:

* Vendor Code
* Vendor Name
* Last Invoice
* Business Value
* Pending Bills

## View the list of active / Inactive / Blacklist vendors

User can see the list of active / inactive / Blacklist vendors.

Below details has to be displayed:

* Active
* Inactive
* Black List

## Track the Purchase Requests raised for a vendor

The below details has to be captured:

* Purchase Order Number
* Vendor Code
* Item Code
* Order Date
* Shipping Date
* Quantity
* Location

## Update the invoice details against a purchase order

User can update the invoice details. The below details have to be captured:

|  |  |
| --- | --- |
| **Information to be added** | **Information to be displayed** |
| Trust  Entity Code  Invoice No  Invoice Date  Invoice Amount  Tax Amount  Vendor Code  Contract Id  Payment Mode  Cheque No  Cheque Date  Amount  Deduction Amount  Paid On  Expense Head  File (Attachment)  Remarks | Invoice  Date (Invoice Date)  Trust  Amount  Deduction  Paid On  Cheque No.  Cheque Date  Cheque Amount  Contract Id |

## Attach the invoices to the assets purchased

To maintain the record user has to attach the invoices in vendor card. To attach the invoices below details has to be updated:

|  |  |
| --- | --- |
| **Information to be added** | **Information to be displayed** |
| Trust  Entity Code  Invoice No  Invoice Date  Invoice Amount  Tax Amount  Vendor Code  Contract Id  Payment Mode  Cheque No  Cheque Date  Amount  Deduction Amount  Paid On  Expense Head  File (Attachment)  Remarks | Invoice  Date (Invoice Date)  Trust  Amount  Deduction  Paid On  Cheque No.  Cheque Date  Cheque Amount  Contract Id |

## Attach the invoice to the contract

To maintain the contract record user has to be attached the invoices. The below details has to be captured:

|  |  |
| --- | --- |
| **Information to be added** | **Information to be displayed** |
| Trust  Entity Code  Invoice No  Invoice Date  Invoice Amount  Tax Amount  Vendor Code  Contract Id  Payment Mode  Cheque No  Cheque Date  Amount  Deduction Amount  Paid On  Expense Head  File (Attachment)  Remarks | Invoice  Date (Invoice Date)  Trust  Amount  Tax  Deduction  Paid On  Cheque No.  Cheque Date  Cheque Amount |