



ONLINE CONTRACT MANAGEMENT (OCM)

Disclaimer

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ONLINE CONTRACT MANAGEMENT (OCM) MANUAL

NOTE: For your ease of reviewing this Manual, hold the **CTRL** button on your keyboard and use the scroller on your mouse in a forward direction to increase the size of your screen (reverse direction to decrease size). Alternatively, go to **VIEW** on top toolbar of screen select **ZOOM** and then **200%**

1 ABOUT ONLINE CONTRACT MANAGEMENT

Maia Financial's web-based Online Contract Management (**OCM**) enables you to view your rental contracts and asset detail information via the internet, allowing you to manage your assets more easily and effectively.

Information provided includes a list of all active contracts, contract start dates and end dates, terms, contract rental amounts and asset value details. You are able to drill down onto a detailed page for each contract to see information such as asset type, description, serial number, supplier, invoice and user. All pages of OCM can be exported into Excel to enable you to manipulate the data according to your requirements.

You may also store your own data on Maia Financial's system to facilitate cost allocation and asset tracking. The service is password protected for security and all information displayed is encrypted and secure. This service also enables you to assign barcodes, users, locations and cost centre information to assets within each contract by utilising the **Edit Asset** functionality.

2 KEY FUNCTIONALITIES

OCM enables you to view your rental contracts and asset detail information over the Internet.

- Management of contracts online, fully secured
- Asset search across all contracts
- Export data to Microsoft Excel format
- Optional function for you to add - user, location, contract location, custodian, cost centre and user defined details

3 LOGGING IN

OCM can be accessed via the web, we support Internet Explorer 6.0 Service Pack 2 and above at a resolution of 1024x768 or higher. Access is via the following address:

<https://app.maiafinancial.com.au/ocm2/>

To receive access to OCM you will need to contact your Account Manager.

You will be given the following details:

- **Login name** - usually firstname.lastname
- **Password** - which you should change the first time you log into the system
- **A Company Code**

This service is password protected for security, with all information being displayed from an internal SQL Server database. All information displayed is encrypted using a Verisign 128bit certificate.

[DELETE OR AMEND ONLINE LOGIN BELOW OR REPLACE WITH MAIA FINANCIAL SYSTEM LOGIN]

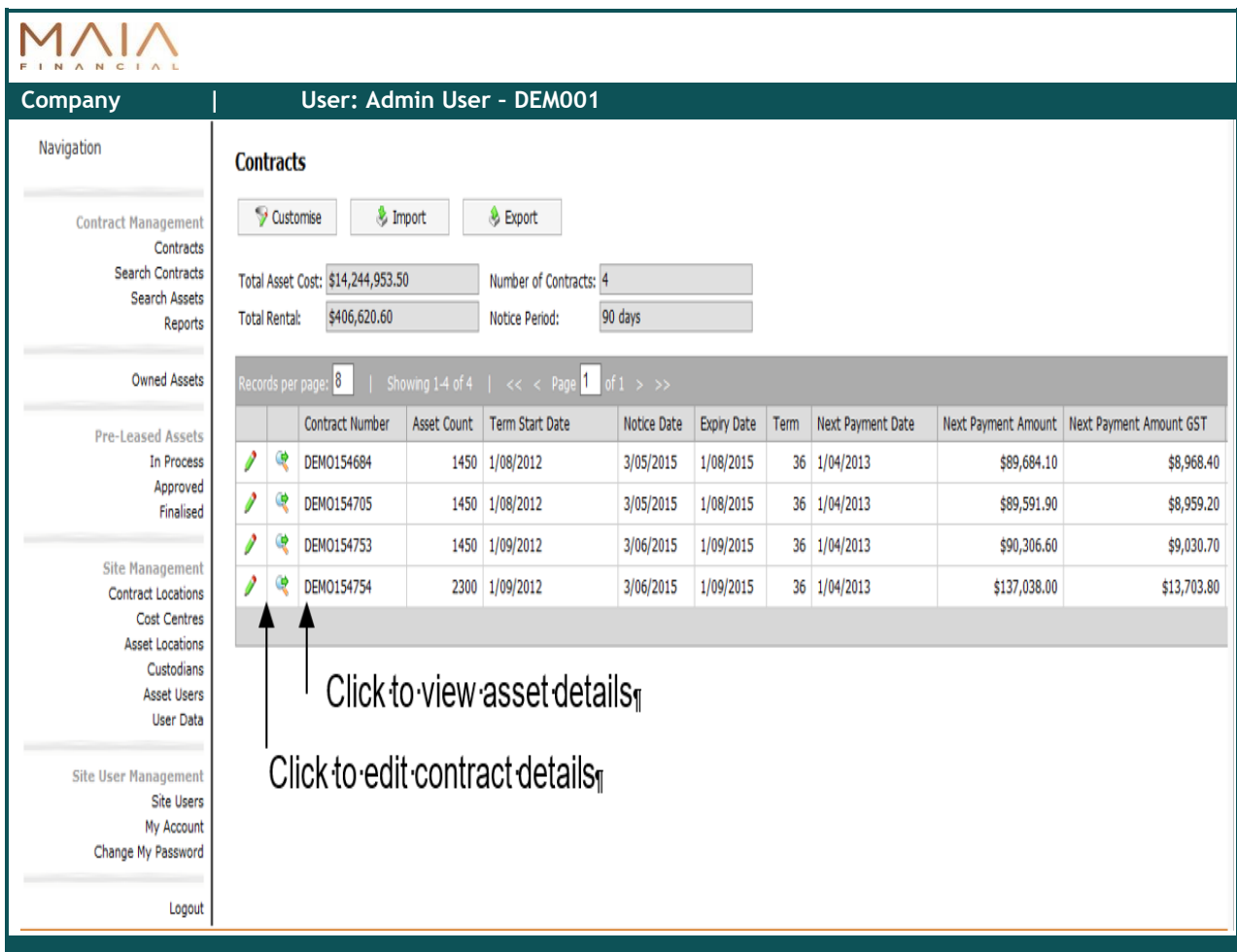
	
Welcome to the Maia Financial Online Contract Management facility. Login to view and manage your contracts.	
Username:	<input type="text"/>
Password:	<input type="password"/>
Company Code:	<input type="text"/>
<input type="button" value="Login"/>	
<small>v.0.029 p002 - 14/09/2015</small>	
Site best viewed under Internet Explorer 6+ By logging into this site you agreed to the Maia Financial OCM Terms & Conditions. <i>Forgotten your password?</i> Please contact your account manager or contact Maia Financial Customer Service. Phone +61 2 9850 5333 (8.30am - 5.30pm AEST)	

4 CONTRACT MANAGEMENT

4.1 Summary Page

By selecting **Contracts**, a summary view of all your active rental contracts will be published, showing all active contracts, term start date, expiry date, term, contract rental and asset value details. From this page you have the ability to edit a contract's location and contract User Defined Fields. You can also drill down into each contract to view asset information such as asset types, descriptions, and serial numbers. From the contract detail page, you may also edit assets to assign a barcode, cost centre, asset location, custodian, user and user defined fields.

- **Customise** button allows you to change the fields currently displayed on screen, this affects the fields that will be exported
- **Import** button allows you to import into the system via an excel template and update contract locations and contract user defined fields for multiple contracts, please contact your account manager for a copy of the import template to be used
- **Export** button allows you to export the current view of information to Excel, note that all records will be returned - not just the currently displayed records per page



Company | **User: Admin User - DEM001**

Contracts

Total Asset Cost: \$14,244,953.50 Number of Contracts: 4
 Total Rental: \$406,620.60 Notice Period: 90 days

Records per page: 8 | Showing 1-4 of 4 | << < Page 1 of 1 >>

	Contract Number	Asset Count	Term Start Date	Notice Date	Expiry Date	Term	Next Payment Date	Next Payment Amount	Next Payment Amount GST
	DEMO154684	1450	1/08/2012	3/05/2015	1/08/2015	36	1/04/2013	\$89,684.10	\$8,968.40
	DEMO154705	1450	1/08/2012	3/05/2015	1/08/2015	36	1/04/2013	\$89,591.90	\$8,959.20
	DEMO154753	1450	1/09/2012	3/06/2015	1/09/2015	36	1/04/2013	\$90,306.60	\$9,030.70
	DEMO154754	2300	1/09/2012	3/06/2015	1/09/2015	36	1/04/2013	\$137,038.00	\$13,703.80

Click to view asset details
 Click to edit contract details

You can click on the **Contact Us** link on the top right of the screen for quick access to your Account Managers details.



4.2 Contract Detail

User: Admin User - DEM001

Navigation

- Contract Management
 - Contracts
 - Search Contracts
 - Search Assets
 - Reports
- Owned Assets
- Pre-Leased Assets
 - In Process
 - Approved
 - Finalised
- Site Management
 - Contract Locations
 - Cost Centres
 - Asset Locations
 - Custodians
 - Asset Users
 - User Data
- Site User Management
 - Site Users
 - My Account
 - Change My Password
- Logout

Assets of Contract No. DEMO154684

Customise
Import
Export Parent Asset(s)
Export Expanded Asset(s)
Export All Asset(s)
Bulk Update
Bulk M

Number of Assets:	1450	Term:	36 months
Total Asset Cost:	\$3,150,690.50	Term Start Date:	13/07/2012
Notice Period:	90 days	Term Expiry Date:	1/08/2015
Next Payment Amount:	\$89,684.10	Next Payment Amount GST:	\$8,968.40
Frequency:	Monthly		

Records per page: 6 | Showing 1-6 of 1450 | << < Page 1 of 242 >> >>

	Contract Number	Asset	Serial Number	Master Serial Number	Description	Barcode	Type	Sub Type	Manufacturer	Model	P/O Number
⊕	DEMO154684	0000998	S12340998652	S12340998652	MC75A6 MOTOROLA PDT WITH VEHIC		Scanner	N/A	N/A		
⊕	DEMO154684	0000998	S12340998653	S12340998653	MC75A6 MOTOROLA PDT WITH VEHIC		Scanner	N/A	N/A		
⊕	DEMO154684	0000998	S12340998654	S12340998654	MC75A6 MOTOROLA PDT WITH VEHIC		Scanner	N/A	N/A		
⊕	DEMO154684	0000998	S12340998655	S12340998655	MC75A6 MOTOROLA PDT WITH VEHIC		Scanner	N/A	N/A		
⊕	DEMO154684	0000998	S12340998656	S12340998656	MC75A6 MOTOROLA PDT WITH VEHIC		Scanner	N/A	N/A		
⊕	DEMO154684	0000998	S12340998657	S12340998657	MC75A6 MOTOROLA PDT WITH VEHIC		Scanner	N/A	N/A		

4.3 Update Assets

Clicking on the **Edit** (Pencil icon) next to an asset will allow you to assign it a barcode, cost centre, asset location, custodian and user. As well as updating any **User Defined Fields**.

Asset Detail

Cancel
 Save

Asset No:

Barcode:

Cost Centre:

Asset Location:

Asset User:

User Defined Fields

MAC Address:

Unique ID:

Checkout Date:

Department:

Scrap Date:

Blue : Yes No

In Use: Yes No

Warranty Expiry:

4.4 Bulk Update

Clicking on the **1→Bulk Update** icon allows you to **4→Assign/Update** cost centre, **3→Location and User** for multiple selected **2→Assets**.

Assets of Contract No. DEMO154684

1. Click Bulk Update

Number of Assets: Term:

Total Asset Cost: Term Start Date:

Notice Period: Term Expiry Date:

Next Payment Amount: Next Payment Amount GST:

Frequency:

Cancel
 Update

Cost Centre: ← 4. Click Update to change details

Asset Location: ← 3. Enter Details


Asset User:

2. Select Assets

Records per page: 4	Showing 1-4 of 1450	<<	<	Page 1 of 363	>	>>					
<input type="checkbox"/>	Contract Number	Asset	Serial Number	Master Serial Number	Description	Barcode	Type	Sub Type	Manufacturer	Model	P/O Numb
<input type="checkbox"/>	DEMO154684	0000998	S12340998652	S12340998652	MC75A6 MOTOROLA PDT WITH VEHIC		Scanner	N/A	N/A		
<input type="checkbox"/>	DEMO154684	0000998	S12340998653	S12340998653	MC75A6 MOTOROLA PDT WITH VEHIC		Scanner	N/A	N/A		
<input checked="" type="checkbox"/>	DEMO154684	0000998	S12340998654	S12340998654	MC75A6 MOTOROLA PDT WITH VEHIC		Scanner	N/A	N/A		
<input checked="" type="checkbox"/>	DEMO154684	0000998	S12340998655	S12340998655	MC75A6 MOTOROLA PDT WITH VEHIC		Scanner	N/A	N/A		

4.5 Audit Trail

Any changes to cost centres, barcodes, contract locations, locations, custodian, users or user defined fields are recorded in an **Audit Trail** at an asset level. Select the **+** sign next to an **Asset** to view the audit history.

Records per page: 8 Showing 1-8 of 332 << < Page 1 of 42 > >>								
	Contract Number	Asset	Serial Number	Description	Barcode	Type	Cost Centre Code	Asset User Code
	09997SLN4002	827	10007	COMPAQ DESKPRO EN SFF	ABC012345	DESKTOP	00123	JONM

Page 1 of 2 (12 items) < [1] 2 >				
Modified By	ModifiedDateTime	Modified Field Name	Changed From	Changed To
Admin User - DEM001	8/01/2010 2:51:18 PM	Cost Centre	3	7
Admin User - DEM001	31/05/2010 2:21:17 PM	Asset Location	Junior School	007
Admin User - DEM001	31/05/2010 2:21:17 PM	Warranty Expiration Date	31/12/2012	31/12/12
Admin User - DEM001	1/06/2010 12:58:45 PM	Warranty Expiration Date	31/12/12	14/12/12
Admin User - DEM001	6/07/2010 9:34:00 AM	Cost Centre	7	00123
Admin User - DEM001	6/07/2010 9:34:00 AM	Asset Location	007	Yr9-07/10
Admin User - DEM001	6/07/2010 9:34:00 AM	Asset User	JLG	JONM
Admin User - DEM001	6/07/2010 9:34:00 AM	Warranty Expiration Date	14/12/12	1/07/13
Admin User - DEM001	21/07/2010 2:12:55 PM	Warranty Expiration Date	1/07/13	1/7/13
Admin User - DEM001	21/07/2010 2:12:55 PM	Serial No Borrowed	E1:56:00:00:43	

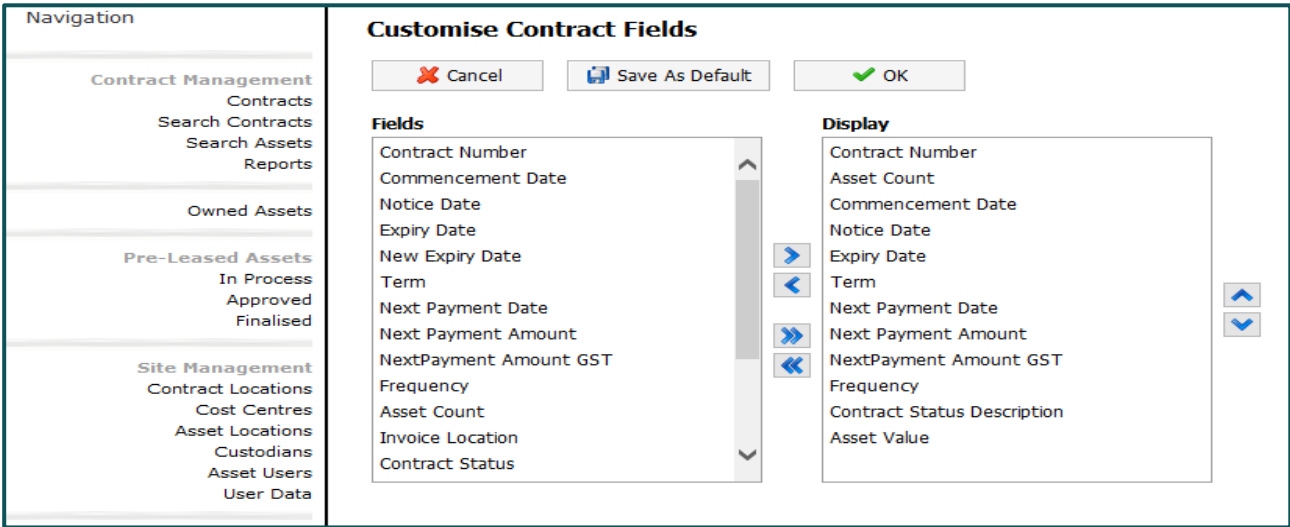
5 MENUS

OCM menus include:

<ul style="list-style-type: none"> Contract Management Contracts Search Contracts Search Assets Reports 	<p>Contract Management</p> <ul style="list-style-type: none"> • Contracts (View contract details) • Search Contracts (Search for contracts with particular characteristics) • Search Assets (Find Assets across all contracts) • Reports (Forecast future rentals and more)
<ul style="list-style-type: none"> Owned Assets 	<p>Owned Assets (Upload, store and manage data about assets you own)</p>
<ul style="list-style-type: none"> Pre-Leased Assets In Process Approved Finalised 	<p>Pre-Leased Assets (Upload, store and manage data about pre-leased assets you wish to lease with <u>Alleasing</u>)</p>
<ul style="list-style-type: none"> Site Management Contract Locations Cost Centres Asset Locations Custodians Asset Users User Data 	<p>Site Management</p> <ul style="list-style-type: none"> • Contract Locations (Define your contract locations) • Cost Centres (Set up <u>cost centres</u> to assign against assets) • Asset Locations (Define your asset locations) • Custodians (Set up your custodians) • Asset Users (Define asset users) • User Data (Set up user defined fields against contracts and assets)
<ul style="list-style-type: none"> Site User Management Site Users My Account Change My Password 	<p>Site User Management</p> <ul style="list-style-type: none"> • Site Users (Add new users) • My Account • Change my Password
<p>Logout</p>	<p>Logout</p>

5.1 Customise Fields

The Customise button allows you to change the fields currently displayed on screen (and also affects the fields that will be exported). On the **Customise** screen you may add and remove columns as well as change the column order. Clicking **OK** will return you to the data grid with the currently selected columns. If you click on the **Save as Default** option, the system will remember your choice for future visits to the site. The reset button will return the columns to your default settings.



5.2 Search Contracts

Customers with a large number of schedules can quickly locate contracts that expire in a certain timeframe or find out when they're due to give notice. You can also locate extended contracts.

Search for multiple contract numbers, contract locations, statuses and user defined fields by selecting them under **?** icon or typing keywords in the field.

Note: You can search by **User Defined Fields** once you have selected **Include in Search Label** in the user data screen.



5.3 Search Assets

Quickly locate assets using a wide range of criteria, from assigned location, to serial number. Also search individual contracts or across all contracts.

Search multiple values by selecting values under **?** icon or typing keywords in the field.

Searching options are available to include and retrieve owned assets and parent serial numbers.

Search results can be quickly exported to Excel.

Note: You can search by **User Defined Fields** once you have selected **Include in Search Label** in the user data screen.

Search Assets (Please select search criteria, then click on the "Search" button)

Clear
Search

Contract No:	<input type="text"/>	<input style="font-size: 8px; border: none; background: none; color: blue; padding: 2px 5px;" type="button" value="?"/>	Notice Date From:	<input type="text"/>	<input style="font-size: 8px; border: none; background: none; color: gray; padding: 2px 5px;" type="button" value="v"/>
Asset Description:	<input type="text"/>	<input style="font-size: 8px; border: none; background: none; color: blue; padding: 2px 5px;" type="button" value="?"/>	Cost Centre:	<input type="text"/>	<input style="font-size: 8px; border: none; background: none; color: blue; padding: 2px 5px;" type="button" value="?"/>
Barcode:	<input type="text"/>	<input style="font-size: 8px; border: none; background: none; color: blue; padding: 2px 5px;" type="button" value="?"/>	Asset Location:	<input type="text"/>	<input style="font-size: 8px; border: none; background: none; color: blue; padding: 2px 5px;" type="button" value="?"/>
Serial No:	<input type="text"/>	<input style="font-size: 8px; border: none; background: none; color: blue; padding: 2px 5px;" type="button" value="?"/>	Asset User:	<input type="text"/>	<input style="font-size: 8px; border: none; background: none; color: blue; padding: 2px 5px;" type="button" value="?"/>
Asset Type:	<input type="text"/>	<input style="font-size: 8px; border: none; background: none; color: blue; padding: 2px 5px;" type="button" value="?"/>	PO Number:	<input type="text"/>	<input style="font-size: 8px; border: none; background: none; color: blue; padding: 2px 5px;" type="button" value="?"/>
			Notice Date To:	<input type="text"/>	<input style="font-size: 8px; border: none; background: none; color: gray; padding: 2px 5px;" type="button" value="v"/>
			Expiry Date From:	<input type="text"/>	<input style="font-size: 8px; border: none; background: none; color: gray; padding: 2px 5px;" type="button" value="v"/>
			Expiry Date To:	<input type="text"/>	<input style="font-size: 8px; border: none; background: none; color: gray; padding: 2px 5px;" type="button" value="v"/>
			New Expiry Date From:	<input type="text"/>	<input style="font-size: 8px; border: none; background: none; color: gray; padding: 2px 5px;" type="button" value="v"/>
			New Expiry Date To:	<input type="text"/>	<input style="font-size: 8px; border: none; background: none; color: gray; padding: 2px 5px;" type="button" value="v"/>

Include Owned Assets?
 Include Parent Serial Number?

User Defined Fields

MAC Address:	<input type="text"/>	<input style="font-size: 8px; border: none; background: none; color: blue; padding: 2px 5px;" type="button" value="?"/>	Blue :	<input type="text"/>	<input style="font-size: 8px; border: none; background: none; color: blue; padding: 2px 5px;" type="button" value="?"/>
Unique ID:	<input type="text"/>	<input style="font-size: 8px; border: none; background: none; color: blue; padding: 2px 5px;" type="button" value="?"/>	In Use:	<input type="text"/>	<input style="font-size: 8px; border: none; background: none; color: blue; padding: 2px 5px;" type="button" value="?"/>
Checkout Date:	<input type="text"/>	<input style="font-size: 8px; border: none; background: none; color: blue; padding: 2px 5px;" type="button" value="?"/>	Warranty Expiry:	<input type="text"/>	<input style="font-size: 8px; border: none; background: none; color: blue; padding: 2px 5px;" type="button" value="?"/>
Department:	<input type="text"/>	<input style="font-size: 8px; border: none; background: none; color: blue; padding: 2px 5px;" type="button" value="?"/>			
Scrap Date:	<input type="text"/>	<input style="font-size: 8px; border: none; background: none; color: blue; padding: 2px 5px;" type="button" value="?"/>			

6 REPORTS

The results of any searches or queries can be quickly exported into Excel to produce a variety of *ad hoc* reports (see **Searching**). Also, a number of pre-defined reports have been designed to make it easy for you to quickly access the information you need.

The screenshot displays the MAIA Financial Reports interface. At the top, the MAIA Financial logo is visible. Below it, the user is identified as 'Admin User - DEM001'. The interface is divided into a navigation menu on the left and a main content area for reports. The navigation menu includes sections for Contract Management, Owned Assets, Pre-Leased Assets, Site Management, and Site User Management. The main content area is titled 'Reports' and includes a 'Run Report' button. Below this, there are two columns: 'Report' and 'Report Criteria'. The 'Report' column lists various report types with radio buttons, and the 'Report Criteria' column includes dropdown menus for 'Contract Number', 'Cost Centre', and 'Asset Location', all set to 'None'.

- **Active Contracts** - shows details for all active contracts
- **Rental Schedules** - shows contracts relating to specific locations or cost centres
- **Equipment Listing by Cost Centre** - provides asset details for specific cost centres or all cost centres, from all contracts or just a specific one
- **Forecast Rental by Cost Centre** - attribute rental payments to different cost centres at an asset level
- **Audit Trail Report** - review asset movements and changes
- **Audit Trail by User** - review asset movements and changes made by a particular user
- **Cost Centre Exception** - shows assets where cost centres that are displayed against those assets no longer exist (in the cost centre list for that customer)

- **Contract Location Exception** - shows contracts where contract locations that are displayed against those assets no longer exist (in the list of contract locations for that customer)
- **Asset Location Exception** - shows assets where asset locations that are displayed against those assets no longer exist (in the list of asset locations for that customer)
- **Custodian Exception** - shows assets where custodians that are displayed against those contracts no longer exist (in the list of custodians for that customer)
- **User Exception** - shows assets where asset users that are displayed against those assets no longer exist (in the list of asset users for that customer)

7 OWNED ASSETS

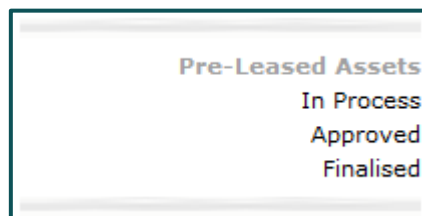
Maia Financial’s OCM allows users to upload and store information about owned assets. This can be helpful in transitioning from capital purchase to a total leasing solution.

Owned assets can be entered into the system one at a time or a spreadsheet can be exported, and details can be entered then uploaded.

7.1 Pre-leased Assets

This functionality provides the capability for you to record and track assets that you wish to lease with Maia Financial.

Please contact your Account Manager if you wish to have this option activated.



8 SITE MANAGEMENT

This section of the site allows you to maintain your companies’ entities (**contract locations, cost centres, asset locations, custodians and asset users**) once created here they can be assigned to assets on the contract detail screen.

8.1 Contract Locations

The **contract locations** page allows you to maintain your companies list of contract locations. Each contract location record consists of a code (unique code representing each contract location) and a description. You may add new Contract Locations, change the description against existing contract location codes, delete contract locations not currently in use and export list of all your companies contract locations in excel format.

If you have a large number of contract locations you may import them into the system via an excel template, please contact your Account Manager for a copy of the import template to be used.

Note: If a user doesn't have access to see a particular contract location, they will not be able to see assets assigned to that contract location. This is configured in the user setup screen.

Navigation

Contract Management

- Contracts
- Search Contracts
- Search Assets
- Reports

Owned Assets

Pre-Leased Assets

- In Process
- Approved
- Finalised

Contract Locations

New
 Import
 Export

Records per page: | Showing 1-2 of 2 | << < Page of 1 > >>

		Contract Location Code	Contract Location Description	Address Line 1	Address Line 2	Address Line 3	State	Postcode
		HO	Head Office	123 Pitt Street	Sydney		NSW	2000
		TEST	Test Location					

8.2 Costs Centres

The cost centre page allows you to maintain your companies list of cost centres. Each cost centre record consists of a code (unique code representing each cost centre) and a description. You may add new cost centres, change the description against existing cost centre codes, delete cost centres not currently in use and export list of all your companies cost centres in excel format.

If you have a large number of cost centres you may import them into the system via an excel template, please contact your account manager for a copy of the import template to be used.

Note: If a user doesn't have access to see a particular cost centre, they will not be able to see assets assigned to that cost centre. This is configured in the user setup screen.

Navigation

Contract Management

- Contracts
- Search Contracts
- Search Assets
- Reports

Owned Assets

Pre-Leased Assets

- In Process
- Approved
- Finalised

Site Management

- Contract Locations
- Cost Centres**
- Asset Locations
- Custodians
- Asset Users
- User Data

Cost Centres

New
 Import
 Export

Records per page: | Showing 9-16 of 294 | << < Page of 37 > >>

		Cost Centre Code	Cost Centre Description
		19	5252 B6130 00000
		10	5252 F0039 00000
		11	5252 F0062 00000
		6	5252 F0624 00000
		4	5252 F2809 00000
		5	5252 F3801 00000
		8	5252 K7091 G0174
		9	5252 K7091 R6908

8.3 Asset Locations

The asset locations page allows you to maintain your companies list of asset locations. Each asset location record consists of a code (unique code representing each location), a description and address details (for reporting purposes). You may add new asset locations, change the description / address against existing asset location codes, delete asset locations not currently in use and export a list of all asset locations in excel format.

Navigation

Contract Management

- Contracts
- Search Contracts
- Search Assets
- Reports

Owned Assets




Pre-Leased Assets

- In Process
- Approved
- Finalised

















Site Management

- Contract Locations
- Cost Centres
- Asset Locations
- Custodians
- Asset Users
- User Data

Asset Locations

 New
 Import
 Export



Records per page: | Showing 1-8 of 8 | << < Page of 1 > >>

		Asset Location Code	Asset Location Description	Address Line 1	Address Line 2	State
		A.06.182		Level 6, 182 Broadway	Auckland	NZ
		A.07.250		Level 7, 250 Queen Steet	Auckland	NZ
		B.03.15		Level 3, 15 Riverbank Parade	Brisbane	QLD
		M.00.101		93-101 Bay Road	Melbourne	VIC
		M.14.180		Level 14, 180 Collins Street	Melbourne	VIC
		S.11.123		Level 11, 123 Pitt Street	Sydney	NSW
		S.4.123		Level 4, 123 Pitt Street	Sydney	NSW
		W.02.065		Level 2, 65 The Terrace	Wellington	NZ

8.4 Asset Location Detail

If you have a large number of asset locations you may import them into the system via an excel template, please contact your Account Manager for a copy of the import template to be used.

Asset Location Detail

 Cancel
 Save

Asset Location Group Code:

Asset Location Code:

Asset Location Description:

Address Line 1:

Address Line 2:

Address Line 3:

State:

Postcode:

8.5 Custodians

The custodian page allows you to maintain your companies list of custodians. Each custodian record consists of a code (unique code representing each custodian) and a description. You may add new custodians, change the description against existing custodian codes, delete custodians not currently in use and export list of all your companies' custodians in excel format.

If you have a large number of custodians you may import them into the system via an excel template, please contact your Account Manager for a copy of the import template to be used.

Navigation

Contract Management

- Contracts
- Search Contracts
- Search Assets
- Reports

Owned Assets




Pre-Leased Assets

- In Process
- Approved
- Finalised







Site Management

- Contract Locations
- Cost Centres
- Asset Locations
- Custodians
- Asset Users
- User Data

Custodians

 New
 Import
 Export

Records per page: | Showing 1-3 of 3 | << < Page of 1 > >>

		Custodian Code	Custodian Description	Address Line 1	Address Line 2	Address Line 3	State	Postcode
		O43563	Auckland Office	Level 7 250 Queen Street	Auckland	New Zealand		
		D46983	Engineering Department	93-101 Bay Road	Melbourne		VIC	3000
		F78325	Finance	123 Pitt Street	Sydney		NSW	2000

8.6 Asset Users

The asset users page allows you to maintain your companies list of asset users. Each asset user record consists of a code (unique code representing each user) and the user name. You may add new Asset users, change the name against existing asset user codes, delete asset users not currently in use and export a list of all asset users in excel format.

If you have a large number of asset users you may import them into the system via an excel template, please contact your Account Manager for a copy of the import template to be used.

Navigation

Contract Management




- Contracts
- Search Contracts
- Search Assets
- Reports

Owned Assets







Pre-Leased Assets


- In Process
- Approved
- Finalised

Asset Users

 New
 Import
 Export

Records per page: | Showing 1-3 of 8 | << < Page of 3 > >>

		Asset User Code	Asset User Description
		ANW	A New User
		Adam Cullen	Adam Cullen
		Cheryl Diaz	Cheryl Diaz



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8.7 User Data

Create your own custom fields to store extra information against contracts or assets. User Defined Fields formats available are **date**, **number**, **text** or **Yes/No**.

There are five User Definable Fields at the contract level and 15 at the asset level.

By selecting **Enabled** this allows you to edit data in the field and adds the field to the customise function so you can choose to make the field visible.

By selecting **Include in Search Label** this will enable you to search the UDF's in the search contract or asset screens.

Note: Once you add a **User Defined Field** you must remember to use the customise function on your contract or asset view and add the new field to the list of those visible.

Navigation		User Data		
Contract Management Contracts Search Contracts Search Assets Reports		<input type="button" value="Save"/>		
Owned Assets		Contract User Defined Fields		
Pre-Leased Assets In Process Approved Finalised		Enabled	Include In Search Label	Format
		<input type="checkbox"/>	<input type="checkbox"/>	Contract UDF1 Text
		<input type="checkbox"/>	<input type="checkbox"/>	Contract UDF2 Text
		<input type="checkbox"/>	<input type="checkbox"/>	Contract UDF3 Text
		<input type="checkbox"/>	<input type="checkbox"/>	Contract UDF4 Text
		<input type="checkbox"/>	<input type="checkbox"/>	Contract UDF5 Text
Site Management Contract Locations Cost Centres Asset Locations Custodians Asset Users User Data		Asset User Defined Fields		
		Enabled	Include In Search Label	Format
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	MAC Address Text
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Unique ID Text
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Checkout Date Date
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Department Text
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Scrap Date Date
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Blue Yes/No
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	In Use Yes/No
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Warranty Expiry Date
		<input type="checkbox"/>	<input type="checkbox"/>	Asset UDF9 Date
Site User Management Site Users My Account Change My Password Logout				

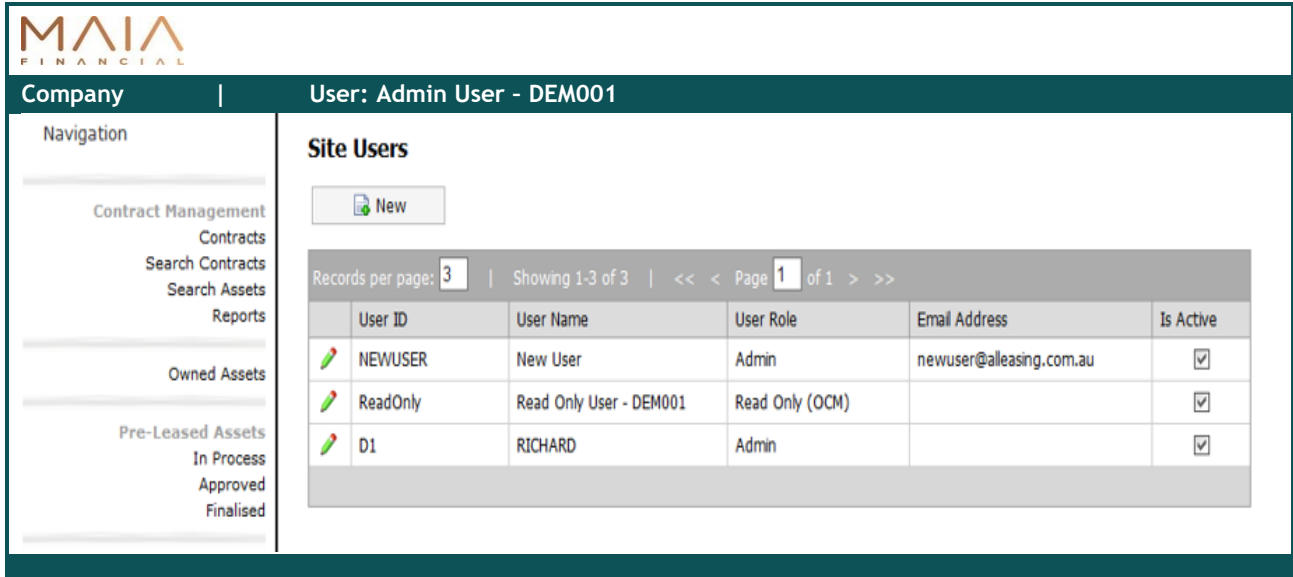
9 SITE USER MANAGEMENT

This section of the site allows you to maintain your companies OCM user accounts.

9.1 Site Users

This page shows you all users currently setup with access to your companies OCM interface. From here you may edit existing users to update their details, assign them to contract locations, cost centres, asset locations or mark them inactive. You may also create new users from this page. When editing an account, you must specify which contract locations, cost centres and asset locations a user has

visibility of, assets not assigned to contract locations, cost centres and/or asset locations a user has been assigned to will not display when they drill down into the contract detail screen.

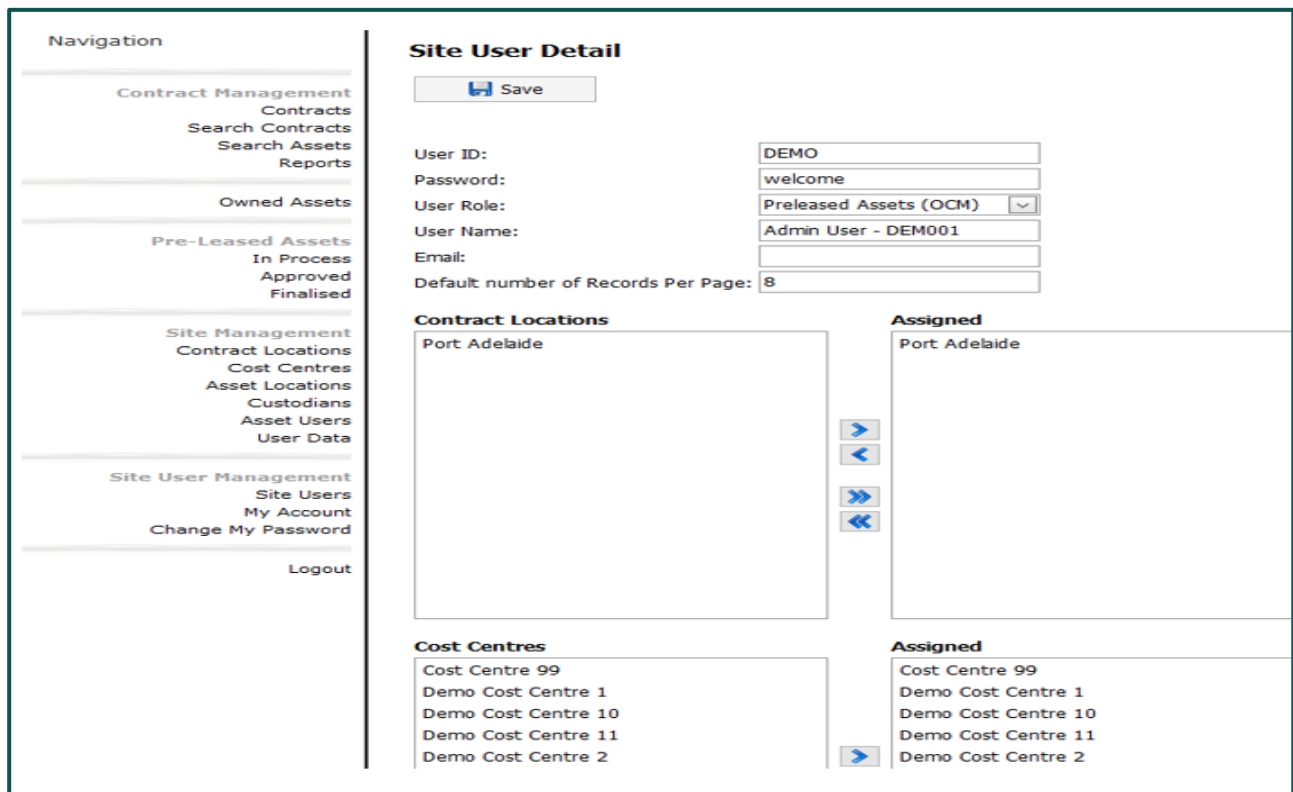


The screenshot shows the 'Site Users' page in the MAIA Financial system. The user is logged in as 'Admin User - DEM001'. The page features a navigation sidebar on the left with categories like 'Contract Management', 'Owned Assets', and 'Pre-Leased Assets'. The main content area displays a table of users with the following data:

User ID	User Name	User Role	Email Address	Is Active
NEWUSER	New User	Admin	newuser@alleasing.com.au	<input checked="" type="checkbox"/>
ReadOnly	Read Only User - DEM001	Read Only (OCM)		<input checked="" type="checkbox"/>
D1	RICHARD	Admin		<input checked="" type="checkbox"/>

9.2 My Account

This page shows details for the currently logged in user and lists what contract locations, cost centres and asset locations they currently have visibility of. Administrators are able to edit which contract locations, cost centres and asset locations are visible to themselves.



The screenshot shows the 'Site User Detail' page for the user 'Admin User - DEM001'. The page includes a 'Save' button and several input fields for user information:

- User ID: DEMO
- Password: welcome
- User Role: Preleased Assets (OCM)
- User Name: Admin User - DEM001
- Email: (empty)
- Default number of Records Per Page: 8

Below the user details, there are four sections for managing visibility:

- Contract Locations:** Port Adelaide
- Assigned:** Port Adelaide
- Cost Centres:** Cost Centre 99, Demo Cost Centre 1, Demo Cost Centre 10, Demo Cost Centre 11, Demo Cost Centre 2
- Assigned:** Cost Centre 99, Demo Cost Centre 1, Demo Cost Centre 10, Demo Cost Centre 11, Demo Cost Centre 2

Navigation arrows are provided between the 'Contract Locations' and 'Assigned' sections, and between the 'Cost Centres' and 'Assigned' sections.

9.3 Change My Password

This page allows the currently logged in user to change their password.

Change Password

Current Password:

New Password:

Confirm New Password:

10 TECHNICAL INFORMATION

10.1 Basic Specifications

- SQL2008 R2 database
- Target browser version IE6 SP2 and above
- Screen size 1024x768
- Web pages are generated using asp, .NET and HTML

10.2 User Security

There are currently 2 types of standard access - **Admin** and **Read only**.

- **Admin** will grant a user full access to OCM2 with ability to modify, add, delete, import, export, bulk update, etc on all sections
- **Read only** will not grant a user any edit or delete permissions, or bulk uploads etc -- the user will only be able to view data

The additional **Cost Centre Admin** access role can be assigned to allow a user control over assets within their assigned cost centres.

10.3 Access Permissions

The below tables illustrate how different access levels are set across OCM.

	View Contract Information	View Asset Information	Run Reports	Maintenance	User Admin
Admin	Y	Y	Y	Y	Y
Cost Centre Admin	Y	Y*	Y*	Y*	N
Read Only	Y	Y*	Y*	N	N

* Only assets within assigned cost centres



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