

# CMO Fixed Assets Dashboard

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## 1. Background

The original fixed assets management process relied on the expense control system for single-item asset registration, resulting in dispersed information and a lack of a consolidated view. Departments compiled asset inventories annually through university-wide stocktaking, and custodians could not access real-time information about assets under their responsibility. Although relevant data existed in the asset system, the absence of a custodian-based permission system and visual reports made it difficult for both individuals and departments to dynamically and intuitively understand asset distribution and status.

## 2. Solutions

Integrated cross-system data through a Business Intelligence (BI) platform and constructed a highly flexible dual-layer permission visual dashboard:

Designed a two-level visual dashboard, matching usage scenarios with permissions:

1) **Custodian Personal Dashboard:** Displays the total volume of assets under the custodian's name, categorizations (asset type, status, service entry year, building distribution), and a detailed ledger, supporting filtering and export.

2) **Department Management Dashboard:** Provides historical and real-time data analysis of the department's fixed assets, covering statistics from custodian, asset attributes, spatial location, and financial dimensions, supporting multi-criteria queries and data export.



Figure 1. Fixed Asset Annual Inventory Results (Last 5 Years)

### Key Optimizations:

- **Data Integration:** Leveraged BI capabilities to successfully merge data from the original asset system and spatial data.

- **Flexible Scalability:** On the BI platform, integrated asset data can be re-edited, calculated, and management fields can be flexibly added or modified, significantly enhancing the data model's adaptability and management granularity.

### 3. Outcomes and Benefits

- **For Custodians:** Enables real-time, one-stop query of complete information (including location details) for all fixed assets under their responsibility, achieving transparent and autonomous asset management.
- **For Managers:** Provides a holistic view of department assets after cross-system integration. Offers multi-dimensional, customizable data analysis, delivering precise and flexible data support for optimal asset allocation, space planning, and resource reallocation.
- **Data Value:** Achieved data fusion and flexible modeling through BI, improving the completeness, readability, scalability, and management efficiency of fixed asset data.

### 4. Replicability and Promotion Value

The dashboard architecture and permission design are scalable to other fixed assets management departments.

## 5. Next Steps

Continuously optimize dashboard functionalities and data analysis dimensions based on user feedback.