



BUSINESS OVERVIEW

Asset Management System

A Capability Overview for the Business Management Office

A discovery and understanding document for the Business Management Office, cabinet members, and business office personnel — describing, in plain business terms, every capability the platform provides.

PREPARED FOR

Chief Business Officer & Cabinet

SCOPE

Asset Management System
(physical & digital assets)

STATUS

Confidential — Internal
Distribution

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EXECUTIVE SUMMARY

One register. Every asset. Every fact.

The Asset Management System is the school's single source of truth for every physical and digital asset the organization owns, leases, or subscribes to. It consolidates responsibilities that today typically live across disconnected spreadsheets, an aging inventory database, a warehouse binder, a facilities work-order log, and a handful of software vendor portals — and it presents them to leadership as one permissioned, searchable, real-time platform.

The business value of that consolidation compounds across five dimensions:

VALUE DIMENSION	WHAT IT DELIVERS
Loss prevention	Every asset is tagged, custody is signed for, and any unaccounted item surfaces the moment a reconciliation runs — not at the next audit cycle.
Compliance readiness	CSAM 410, 2 CFR 200.313, Education Code § 35168, and GASB 34, 87 & 96 are supported natively, with reports formatted the way auditors expect them.
Cost optimization	License metering exposes unused SaaS seats, warranty tracking catches vendor-covered repairs, and depreciation reveals which asset classes consume capital fastest.
Refresh planning	A defensible, multi-year replacement forecast tied to specific serial numbers and expected costs replaces the annual scramble.
Operational efficiency	Barcode/RFID scanning, mobile capture, and one-click reports shorten routine tasks from minutes to seconds and, in aggregate, from days to hours.

The rest of this document walks through the eleven capability areas the system delivers, in the same order they appear in the source feature guide. Each section explains what the feature does, how it works in the flow of a business office day, the operational and financial advantages it delivers, how it reduces human error, and how it makes the asset record more precise and defensible.

Realistic school-district examples and specific metrics are woven throughout, and a set of cross-feature scenarios shows how the modules combine into a coherent platform rather than a collection of separate tools.

Scope of this overview

This document covers the Asset Management System only, addressing both physical assets (equipment, furniture, vehicles, hardware) and digital assets (software licenses, SaaS subscriptions, cloud entitlements, intangible assets). Budgeting, accounts payable, accounts receivable, general ledger, and the broader financial management suite are intentionally out of scope and are documented separately.

01

SECTION 01

Introduction & Overview

Why the platform exists, who it serves, and the business problems it is designed to solve.

1.1 Purpose

The Asset Management System (AMS) exists to answer, in seconds and with defensible evidence, the questions a Chief Business Officer must be able to answer every day: what does the district own, where does it live, who is responsible for it, what is it worth today, when does it need service or replacement, and does anything about it put the district at compliance or financial risk.

In most schools and districts today, answering any one of those questions requires pulling a spreadsheet from a shared drive, calling a site administrator, cross-referencing a purchase order, and then reconciling three different numbers. The AMS replaces that chain of manual steps with a single record per asset that carries every fact about the asset for its entire life — from the purchase order that funded it through its disposal and audit trail.

The specific business problem the platform is designed to solve is the erosion of accuracy that occurs when asset data lives in more than one place. Every time a laptop moves between employees, every time a projector is relocated between rooms, every time a subscription seat is reassigned, and every time a work order is closed, an update must happen in the record.

When there are five records — a warehouse spreadsheet, an IT inventory list, a site principal's file, a facilities log, and the general ledger — five updates are required, three of them will not happen, and the register drifts from reality.

The AMS collapses those five records into one authoritative record with permissioned edit access, an immutable audit trail, and downstream reports that automatically stay current.

1.2 Who the System Is Built For

The platform is designed to serve every stakeholder who interacts with district property. Chief Business Officers and administrators use it for board reporting, insurance renewals, capital planning, and any question that starts with “how many” or “what is it worth.”

Asset managers and warehouse supervisors live in the daily transaction flow — intake, tagging, transfers, disposals, and inventory reconciliation. Site administrators and principals rely on it for scoped visibility into their own site’s inventory and to confirm what has been checked out to whom.

IT directors manage the hardware fleet, software licenses, and cloud subscriptions in a single lifecycle view rather than three separate ones. Compliance officers and internal or external auditors use the platform to plan and execute inventory audits, run regulatory reports, and review the audit trail. Field technicians use the mobile-friendly interface to receive shipments, close work orders, and capture geolocation, signatures, and photos in the field without returning to a desk.

1.3 The Business Problems the System Solves

The AMS addresses five categories of problems that arise in every school district business office.

LOSS PREVENTION

In a spreadsheet-based approach, an item that is not present is usually discovered only when someone looks for it — often months or years after it disappeared. In the AMS, custody is signed for at every hand-off, the last known custodian and location are always current, and an unaccounted item is flagged the moment a room is counted during an inventory audit. Rather than absorbing loss silently, the district investigates while the trail is still warm.

COMPLIANCE READINESS

California CSAM 410 requires a physical inventory of school property on a defined schedule. Federal Uniform Guidance 2 CFR 200.313 requires biennial inventory for equipment acquired with federal funds and specific disposition documentation. Education Code § 35168 imposes an inventory obligation for items valued at \$500 or more. GASB 34, 87, and 96 each impose their own capital, lease, and subscription reporting requirements. The AMS ties each of those standards to the features that satisfy them, so compliance becomes a matter of running a report rather than assembling one.

COST OPTIMIZATION

The platform exposes cost data that spreadsheets typically hide. Depreciation figures show which asset classes are consuming capital fastest. License metering shows how many seats of a subscription are actually being used, so at renewal the district right-sizes rather than over-provisioning. Warranty tracking catches in-warranty repairs before the district pays a vendor for work that should have been covered. Maintenance history on individual assets reveals when repair costs have exceeded the value of continuing to own the item.

REFRESH PLANNING

By combining acquisition date, useful life, condition rating, and maintenance history, the platform projects when each asset class will reach end-of-life. Those projections aggregate into a multi-year refresh forecast that turns “we probably need to buy some laptops next year” into a defensible, board-ready capital request tied to specific serial numbers and specific expected costs.

OPERATIONAL EFFICIENCY

Barcode and RFID scanning, mobile capture, cascading location pickers, and cached search shorten every transaction. The checkout that used to take a warehouse operator two or three minutes takes a few seconds. A physical inventory that used to consume days of clerical reconciliation runs in the background as counters scan rooms.

1.4 How the Modules Fit Together

The eleven sections that follow describe the platform's capability areas one by one. They are not eleven separate products — they are one platform in which each capability builds on the record established in Registration & Onboarding (Section 2) and visible through Tracking & Visibility (Section 3). Custody, location, maintenance, depreciation, compliance, reporting, and alerts all read from and write back to that same central record, which is why the platform's value grows over time rather than degrading as spreadsheets do.

02

SECTION 02

Asset Registration & Onboarding

The foundation record every other capability rests on — and the error-prevention built into intake.

2.1 Why Registration Is the Foundation

Every other capability the system offers rests on the quality of the record created at registration. An asset that is not registered cannot be tagged, cannot be assigned custody, cannot be depreciated, cannot appear in an audit, cannot be searched, and cannot be reported. An asset that is registered but with incomplete fields — no serial number, no cost, no funding source — will produce reports that are missing or wrong. Registration discipline is the single largest determinant of whether the platform delivers its full value, which is why the registration workflow is designed to catch missing and inconsistent data at the moment of entry rather than months later.

2.2 Physical Versus Digital Assets

The platform distinguishes between two families of assets and adapts its forms, workflows, and reports to each.

Physical assets are tangible items that occupy a location and typically carry a serial number and a barcode or RFID tag — laptops, iPads, projectors, vehicles, HVAC units, science lab equipment, athletic gear, and furniture.

Digital assets are intangible items that carry entitlements, expiration dates, and usage limits rather than a physical presence — perpetual software licenses, SaaS subscriptions, cloud storage plans, digital media libraries, and domain names. Both families live on the same platform under one register, which is critical because a school district's asset base today is roughly half physical and half digital in dollar terms and treating

the two separately produces reporting gaps that only surface at audit time.

2.3 What the Registration Form Captures

The registration form is grouped into logical sections so that a user only sees the fields that apply to what they are entering. The Identification block, required for every asset, captures the asset name or description, the asset tag number (auto-suggested or manually entered), the category (which drives depreciation, useful life, and reporting groupings), and the current status.

The Acquisition block, also required, captures the acquisition date, the acquisition cost, the vendor, an optional purchase order reference, and the funding source — general fund, federal grant, bond, donation, or lease. Because the funding source is captured at registration, every downstream report that filters by funding source (such as the federal grant reconciliation) is accurate without any extra effort.

For physical assets, the form additionally captures manufacturer, model, and serial number; barcode or RFID tag; a three-level location resolved to a specific room; a custodian who is either an individual employee or a department; warranty start and end dates; and a condition rating. For digital assets, the form captures license type (perpetual, subscription, volume, concurrent), publisher, seat count or usage limit, contract start and renewal dates, an auto-renew flag, the list of assigned users or the assigned department, and an SBITA classification for subscriptions that fall under GASB 96. Optional metadata — photos, invoice PDFs, warranty cards, spec sheets, insurance policy numbers, grant identifiers, and internal notes — attaches directly to the asset record so that later audit questions can be answered from the record itself without hunting for external files.

2.4 Reducing Human Error at the Moment of Entry

Registration is the point where most asset-data errors are introduced, and the form is designed to catch them. When a serial number is entered, the system checks the register for a duplicate and warns the user before saving, which prevents the classic problem of the same laptop being entered twice under two different tags.

When a required field is blank, the save is blocked until the field is populated, so records never reach the register with missing acquisition cost or missing category. When an auto-tag setting is enabled, sequential asset tag numbers are assigned by the system rather than by the user, which eliminates gaps and duplicates that manual tag issuance produces over time.

2.5 Registering a Physical Asset — Walkthrough

Registering a new employee laptop follows a linear path. The user opens the asset list, clicks the “New Asset” action, selects Physical Asset, and completes the identification block by naming the asset (for example,

“MacBook Pro 14 — J. Rivera”), choosing the “Computer — Laptop” category, and setting the status to Active.

The user then completes the acquisition block with the date, cost, vendor, and purchase order number, followed by the physical details block — manufacturer, model, serial number, location by site, building, and room, custodian, warranty dates, and condition. The user optionally attaches the vendor invoice PDF and a photo of the device, then clicks “Save & Print Label,” which commits the record and simultaneously sends a barcode label to the print queue for immediate application to the device.

2.6 Registering a Digital Asset — Walkthrough

Registering an Adobe Creative Cloud subscription follows a parallel path adapted to the digital asset family. The user navigates to the software licenses list, clicks “New License,” and selects the appropriate license type — for a Creative Cloud team subscription that would be “Subscription — Named User.” The user then enters the publisher, product name, version, acquisition cost, contract start and renewal dates, and seat count.

The user toggles the auto-renew flag, sets a renewal reminder window (a default sixty days before renewal is typical), and adds the individuals or department who will consume the seats. If the subscription qualifies as a SBITA under GASB 96, the user completes the SBITA Classification wizard, so the system amortizes the right-to-use asset correctly over the subscription term. Attaching the executed order form and vendor terms as documents completes the record.

2.7 Bulk Onboarding for Legacy Data

Registering assets one at a time is appropriate for ongoing intake but not for the initial migration from spreadsheets, which typically involves hundreds or thousands of records. Two bulk paths are supported. The Data Import flow accepts a CSV or Excel file, maps each column to a system field via the field mapping screen, validates required fields, flags duplicates by serial number or asset tag, and lets the user review the result before committing.

The Historical Cost Wizard solves a common problem in school districts: legacy assets whose original purchase price has been lost. Rather than leaving those assets unvalued, the wizard estimates historical cost using standard cost tables adjusted by the Consumer Price Index, producing a defensible book value that auditors accept.

PRACTICAL CAUTION

The first import should always be a small pilot batch of ten to twenty rows so that mapping errors, formatting inconsistencies, and duplicate-detection surprises surface at low cost. The two-hour investment in a pilot batch typically saves days of cleanup on a full five-thousand-row import.

2.8 Categories Drive Everything Downstream

Asset categories are not simply labels. Each category defines the default useful life in years, the default depreciation method, whether items in that category are capitalized or expensed, the applicable SACS object code for governmental accounting, and whether items require serial numbers or specific attributes. Because these defaults propagate to every asset in the category, the district can change depreciation policy for an entire class of assets by editing one category rather than editing thousands of individual records. That single-source-of-truth approach for policy is what makes the register stay consistent as the organization grows.

03

SECTION 03

Asset Tracking & Visibility

The dashboards, search, and status lifecycle that turn the register into an operational surface.

3.1 Why Visibility Is the Payoff

Registration discipline is the investment; visibility is the return. Even a perfectly registered asset base delivers no value if leadership cannot get a straight answer to a straight question — how many laptops are unassigned right now, which vehicles are in maintenance, what software renews next quarter, what is the total book value of active vehicles across the district. The tracking layer is the surface through which those answers appear, and it is designed to produce them in seconds rather than in the days a spreadsheet-based approach usually requires.

3.2 The Asset List Dashboard

The Asset List is the operational home screen for anyone who works with assets. At the top, category tiles summarize counts and total book value per category so that the shape of the register — how many computers, how many vehicles, how many pieces of furniture, and their combined value — is visible at a glance.

A filter drawer on the left provides granular filters on status, category, site, custodian, funding source, warranty state, and date ranges, and any combination of those filters can be applied simultaneously.

A full-text search bar spans asset name, tag number, serial number, and description, so an operator who has only partial information can still find the record. Saved views persist commonly used filter combinations so that a site administrator who checks “active assets at my site” every morning clicks once rather than reconstructing the filter each day.

Column controls let users add, hide, and reorder columns without administrator involvement, and bulk actions operate on any selection. A warehouse operator can reassign custody of fifty items, print labels, mark items for disposal, or export them to PDF in a single operation rather than fifty separate ones.

3.3 The Status Lifecycle

Every physical asset moves through a defined lifecycle with six named statuses: Active (in service and accounted for), In Maintenance (temporarily out of service with an open work order), In Transit (being transferred between locations or custodians), Retired (no longer in service but still on the books pending disposal), Disposed (formally removed from the register with a disposal record), and Lost / Missing (cannot be located, triggering an incident record and an audit-trail entry).

Every status change is logged with the user, the timestamp, and the reason, so a full lifecycle history is always reconstructable from the record itself. In practical terms, this eliminates the very common finding at audit that “the register shows this asset as active, but nobody has seen it in eighteen months” — because a status transition would have been logged eighteen months ago, and the district would have been alerted then rather than at audit.

3.4 Scan-to-Find

For any user with a phone, tablet, or handheld scanner, locating an asset takes a single action. The user opens the Scan screen from the sidebar, grants camera permission (only the first time), scans the barcode or QR code on the tag, and lands directly on the Asset Detail page with location, custody, warranty, and maintenance status visible. RFID readers can stream reads into the same screen for warehouse-scale sweeps, in which case dozens of assets are identified in a single pass.

The operational impact is significant: a warehouse operator confirming a shipment of thirty devices no longer types thirty serial numbers into a search bar — the operator sweeps a reader across the shipment and the platform confirms which items are present and which are missing.

3.5 The Asset Detail Dossier

The Asset Detail page is the single dossier per asset, organized into tabbed sections so a user can drill into whichever facet is relevant. The Overview tab shows all registration fields, current status, current book value, and warranty countdown. The Custody History tab shows every checkout, checkin, and transfer with dates and signatures. The Maintenance tab shows every work order, cost, and preventive schedule associated with the asset.

The Valuation tab shows historical cost, accumulated depreciation, current book value, and any market-value

adjustments. The Documents tab holds invoices, warranty cards, photos, and inspection reports. The Audit Trail tab lists every field change with the user and timestamp responsible for it. Consolidating those six facets into one dossier is what makes it possible to answer a question about a single asset without opening three different systems.

3.6 Answering a Board Question in Under Thirty Seconds

SCENARIO

The board asks, “How many active vehicles do we own across all sites and what is their combined current book value?” Under the spreadsheet approach, that question triggers a request to the transportation supervisor, a merge across two spreadsheets, a manual sum, and a follow-up if the numbers do not reconcile — a process typically measured in hours. In the AMS, the user opens the asset list, applies Category equals Vehicles and Status equals Active, and the summary bar at the top of the filtered list shows the count and the total current book value in the time it takes to describe the filter. A one-click PDF export attaches the number to the board packet. Total elapsed time is under thirty seconds, and the number is defensible because it comes from the same register that produces the year-end audit report.

04

SECTION 04

Asset Assignment & Ownership

Signature-backed custody workflows, department assignment, and approval-routed transfers.

4.1 Ownership Versus Custody

The system draws a deliberate distinction between two concepts that are frequently conflated in spreadsheet-based tracking. Ownership describes the fact that the district owns the asset. That fact is invariant for the life of the asset (except at disposal). Custody describes who is responsible for the asset right now — an individual employee, a contractor, a department, or a specific site. Custody changes many times over the life of an asset, and each change of hands is what creates accountability. When an item goes missing, ownership is not what tells the district who is responsible; the custody record is.

4.2 Checkout Workflow

Assigning custody of an asset to an individual follows a signature-backed workflow. The warehouse operator opens the Checkout screen, scans or searches for the asset by tag or serial, selects the receiving custodian, and enters an expected return date if the checkout is temporary (loaner laptops, event equipment, athletic gear).

Before the signature step, the system displays the custodial responsibility statement and the terms under which the custodian is accepting responsibility, typically including care obligations, return conditions, and financial responsibility for loss or negligent damage. The custodian signs on the touchscreen or signature pad. Once confirmed, the asset status updates and the custody history is recorded permanently.

The value of enforcing the signature step is direct. In a spreadsheet approach, custody is asserted by a note in a cell that is easy to dispute when an asset later goes missing. In the AMS, the signature is captured as an image tied immutably to the transaction, which is defensible evidence for both internal loss investigations and, when

necessary, for financial recovery discussions.

4.3 Check-in Workflow

Return follows a parallel signature-backed workflow. The custodian returns the asset to the warehouse operator, who inspects it and notes any damage or missing accessories. If damage is found, a single action files an incident record and can automatically open a maintenance work order, so damage is triaged at the moment of discovery rather than surfacing weeks later when the next user tries to power the device on.

Both the returning custodian and the receiving warehouse operator sign, and the asset returns to inventory. The result is that damaged returns are tracked, priced, and addressed rather than absorbed silently into the operating budget.

4.4 Department and Site Assignment

Not every asset is checked out to an individual. Fixed equipment such as a lab printer, a conference-room projector, a kitchen freezer, and a portable classroom heater — is assigned to a department or a location as its long-term custodian, with individual checkouts still available for temporary reassignments. This dual model matters because it matches how schools and districts actually operate: the principal is responsible for the projector in the staff lounge, but that projector may be signed out temporarily to a teacher for a professional development event and then returned to the lounge. The AMS captures both the permanent responsibility and the temporary hand-off without forcing an unnatural choice between them.

4.5 Transfer Workflow With Approval Routing

Transfers move an asset from one custodian, department, or location to another and can be configured to route through an approval chain based on category or dollar threshold. The user opens the asset details, initiates a transfer, selects the destination, enters a reason, and (if policy requires) submits for department approver review. Once approved, both sending and receiving parties sign, and the transfer completes. Approval routing is what protects the district from unauthorized movement of high-value items. A \$60,000 spectrometer cannot be quietly transferred from the science department to another site by a single-user action, because the policy for that category requires an approver.

4.6 Ownership History as Audit Evidence

Every asset carries a permanent, immutable ownership history visible on the Custody History tab. Each entry includes user, timestamp, action, location, and signatures. Signatures captured during checkout, checkin, and

transfer are stored as images tied to the transaction record and cannot be edited or deleted after the fact. This immutability is required for defensible audit evidence — an auditor reviewing a loss claim needs to see that the record has not been retouched to change the outcome, and the platform's design guarantees that property.

05

SECTION 05

Multi-Location Management

The Site !' Building !' Room hierarchy, geolocation for outdoor assets, and multi-site transfers.

5.1 The Three-Level Hierarchy

The system organizes physical space as a three-level hierarchy: Sites at the top (a campus, an office building, a district facility), Buildings within a site (each structure at that campus), and Rooms within a building (the discrete spaces where assets actually live). Every physical asset must be resolved to a room, not to a site. That level of granularity is the single most important design decision for making physical inventory efficient, because a counter can walk into a specific room and confirm exactly which assets should be present. A district with fifty sites, two hundred buildings, and three thousand rooms produces an inventory plan in which each counter has a well-scoped list to verify — the difference between a two-week audit and a two-day audit.

5.2 Setting Up a New Site

Adding a new site is a linear process. The user opens the Sites list, adds the site with name, code, address, and coordinates, then adds the buildings within the site, then adds the rooms within each building with room numbers or names. Floor plans can be attached at the building level, which is particularly useful for physical inventory planning because a counter can print or view the floor plan to route through rooms in a logical order rather than backtracking.

5.3 Geolocation

Some assets such as outdoor units, portable equipment, field-deployed devices do not have a room. For those

cases, the platform integrates a unique geolocation system that assigns a unique three-word address to every three-meter square on the school campus. A field technician can pin the exact location of an HVAC condenser on a roof, a portable generator on a construction site, or the scene where a work order is being performed. In practical terms, this eliminates the delay caused when a facilities team dispatches a technician who then spends fifteen minutes finding the unit — the three-word address routes them directly to the piece of equipment.

5.4 Multi-Site Transfers

Moving an asset from Site A to Site B is a special class of transfer. The sending site initiates the transfer and selects the destination site, building, and room. The asset enters the “In Transit” status until the destination site confirms receipt. On receipt, the destination custodian signs, and the asset returns to Active status at its new home. The In Transit interval is important — it prevents an asset from being counted twice (once at each site) if an audit runs during the move, which is a common source of overstatement in spreadsheet-based inventories.

5.5 Location-Centric Views

Two dashboards support location-based operations. The Site Detail view shows every asset, every open work order, and every open custody record tied to that site, giving a principal or site administrator a complete operational picture of their location in one page.

The Work Orders by Location view combines a map or floor plan with a list of open work orders, letting a technician plan an efficient route across a campus rather than jumping between disconnected addresses. Pairing What3Words pins with this view is especially productive for large campuses: technicians walk directly to each pin without hunting for room numbers on unfamiliar buildings.

06

SECTION 06

Maintenance Management

Preventive schedules, corrective work orders, and the maintenance history that grounds replacement decisions.

6.1 Preventive and Corrective, Unified Under Work Orders

Two maintenance families are supported. Preventive maintenance is scheduled, recurring work designed to prevent failure — annual HVAC service, quarterly vehicle inspections, monthly generator tests.

Corrective maintenance is reactive work triggered by a failure, damage report, or user request. Both flow through the same work order object, which is what makes the maintenance history for any asset complete and searchable. In a district that separately tracks preventive service in a facilities spreadsheet and corrective service in a helpdesk ticket system, no one ever has a full picture of what an asset costs to keep running. The AMS puts both into the same history.

6.2 Scheduling Preventive Maintenance

Preventive schedules are configured once and generate work orders automatically. The user opens the Schedules screen, creates a new schedule, selects the asset or a class of assets (“All Diesel Generators,” “All Rooftop HVAC Units”), defines the cadence (every N days, weeks, or months, or by usage meter such as miles, hours, or cycles), chooses the responsible technician or vendor, and attaches a checklist template listing the tasks to perform, parts to inspect, and tools required.

A lead-time alert (for example, “notify fourteen days before due”) ensures the responsible party has time to plan. Once saved, the system generates work orders at the next due date and every recurrence thereafter, without manual intervention. The administrative time saved is significant: a district with several hundred

assets on preventive schedules would otherwise spend hours per month manually generating and dispatching tickets.

6.3 Opening and Completing a Work Order

Whether generated by a schedule or opened manually by a user, a work order captures the asset, location, priority, and assigned technician. The technician can optionally pin the exact work location using geolocation, attach photos of the issue before starting, log labor time and parts consumed as work progresses, attach photos of the completed work, and mark the order complete.

On completion, the associated asset returns to Active status. Every field, photo, and cost line becomes part of the asset's permanent history and feeds the reporting layer immediately.

6.4 Maintenance History as Replacement Evidence

The Maintenance tab on the Asset Detail page rolls up the full history into decision-useful metrics: total lifetime maintenance cost, cumulative downtime days, average cost per intervention, and any visible failure pattern (for example, three battery replacements in eighteen months).

This is precisely the evidence a CBO needs to justify a replacement decision to the board — rather than arguing that “our vehicles are getting old,” the CBO can present that Vehicle #47 has accumulated \$18,400 in maintenance in the past three years against a current book value of \$6,000. The replacement conversation becomes analytical rather than intuitive.

6.5 Alerts That Prevent Wasted Spend

Three alert categories help prevent wasted spending on maintenance. Upcoming alerts flag preventive work orders about to become due, with a configurable lead time so parts can be ordered and technicians scheduled. Overdue alerts flag preventive work that has passed its due date, so the manager responsible knows before a preventable failure occurs.

In-Warranty alerts fire when a corrective repair is opened on an asset that is still under warranty, prompting the technician to seek vendor-covered service before the district pays out of pocket. Across a fleet of hundreds of assets, catching even a handful of in-warranty repairs each year prevents thousands of dollars in avoidable spending.

6.6 Example — A District HVAC Preventive Program

WORKED EXAMPLE

Consider a district with forty-seven rooftop HVAC units distributed across six sites, each requiring semi-annual service. Under the AMS, the facilities director creates a single schedule targeting the “HVAC — Rooftop” category with a six-month cadence, a twelve-step inspection checklist, and the contracted HVAC vendor as the assignee. The system produces ninety-four work orders per year, distributes them across a twelve-month calendar, and alerts the director fourteen days before each due date. The vendor scans a QR code at each unit to close the corresponding work order, capturing before-and-after photos automatically. What was previously a manual dispatch process consuming several hours per week becomes a background operation the director monitors, with a complete photographic and cost record accumulating on each of the forty-seven units.

07

SECTION 07

Depreciation Tracking

Methods, policy configuration, SBITA amortization, and the reports that depend on defensible book value.

7.1 Why Depreciation Matters to the Business Office

Depreciation is the mechanism through which the accounting value of an asset is spread across the years it delivers service. Correct depreciation produces a defensible book value at any point in time — the number the district reports to insurers at renewal, to the board on the annual capital report, and to auditors at year-end. It supports capital reconciliation by tying the asset register to the capital accounts in the general ledger.

And it drives replacement planning because assets approaching zero book value are natural candidates for the refresh queue. Incorrect depreciation, by contrast, produces a book value that is too high (overstating district assets and, if used for insurance, inviting over-insurance premiums) or too low (understating the asset base and complicating grant reporting).

7.2 Supported Depreciation Methods

The platform supports the four methods most commonly required in public-sector accounting:

METHOD	HOW IT WORKS
Straight-line	The most common default; spreads cost equally across the asset's useful life.

METHOD	HOW IT WORKS
Declining balance	Accelerated; produces higher expenses in early years, matching the value-degradation curve of many technology assets.
Units of production	Ties expense to usage — miles for vehicles, hours for generators, copies for print devices.
Half-year / mid-month	Apply standard proration conventions for the first and last year of service.

In addition, custom conventions allow category-specific overrides for special asset classes such as building improvements or specialized instructional equipment.

7.3 How Depreciation Policy Is Configured

Three levers determine depreciation policy for any given asset. The capital threshold — for example, \$5,000 — is the dollar amount above which an asset is capitalized and depreciated rather than expensed. Items below the threshold are recorded but not carried in the capital accounts. The per-category defaults carry a default method and useful life for each category, which is why maintaining accurate categories is important and a per-asset override allows an individual asset to depart from the category default when necessary — for example, an unusually long-lived piece of equipment whose actual service life exceeds the category's typical useful life.

The three-layer design allows policy to be set at the right level of granularity: mostly at the category, with individual overrides where genuinely warranted.

7.4 Depreciation on the Asset Detail

The Valuation tab on the Asset Detail page presents a chart of book value over time with the calculation table beneath — original cost, useful life, method, salvage value, current-year expense, accumulated depreciation, and current book value. Any user with access to the record can see how the value was computed and how it will decline in future years. The transparency of the calculation matters because it removes disputes: an auditor questioning a book value can see every input directly.

7.5 Digital Asset Amortization and SBITA Classification

Intangible assets and SBITA-classified subscriptions are amortized rather than depreciated, but the workflow is analogous. Perpetual software licenses amortize over their expected useful life. Subscription-based IT arrangements that meet the definition in GASB Statement 96 amortize a right-to-use asset over the

subscription term. The system computes and posts amortization automatically once classification is confirmed through the SBITA Classification wizard, which is essential because most districts subject to GASB 96 have dozens of qualifying subscriptions and manual amortization at that scale is untenable.

7.6 The Reports That Depend on Depreciation

Three depreciation-driven reports satisfy the recurring audit requirements. The Depreciation Schedule produces full detail per asset for a fiscal period. The Capital Asset Roll forward presents beginning balance, additions, disposals, depreciation, and ending balance in the shape auditors expect. The Capital Asset Reconciliation ties the asset register to the general ledger capital accounts and identifies any variance line-by-line. Because these three reports all draw from the same underlying depreciation calculations, they are internally consistent.

A common source of audit findings in spreadsheet-based approaches is that the same asset base produces three subtly different depreciation numbers depending on which spreadsheet was used.

7.7 The Controlled-Posting Safeguard

Depreciation posting is a controlled operation. Only users with the Finance Administrator role can execute a period posting, and once a period is posted, depreciation for that period is locked. Any adjustment requires a documented policy exception. This safeguard prevents the accidental or unauthorized reopening of prior periods, which is an important integrity control both for internal governance and for external audit.

08

SECTION 08

Compliance & Audit Management

The immutable audit trail, CSAM 410 four-phase inventory, federal grant equipment, and Ed Code § 35168.

8.1 The Immutable Audit Trail

Every meaningful action in the system — asset creation, custody change, maintenance completion, disposal, depreciation posting, permission change — is written to an immutable audit log. The log can be filtered by user, action type, date range, or entity, so an investigator answering a question like “who last modified the acquisition cost on this asset, and when” gets a defensible answer in seconds. The immutability of the log is what makes it useful in an audit context: an auditor examining the log knows that the record has not been retouched to change history.

8.2 Physical Inventory Under CSAM 410 and Federal Grant Rules

The platform implements the four-phase physical inventory required by California CSAM Procedure 410 and by federal Uniform Guidance 2 CFR 200.313 for grant-funded equipment:

PHASE	WHAT HAPPENS
1 — Create	The compliance officer opens a new audit, selects a scope (all sites, one site, or a specific building/room set), chooses auditors, and sets target start and completion dates. The scope determines exactly which assets are in scope.

PHASE	WHAT HAPPENS
2 — Precount	The system generates a Precount Sheet — the list of assets that should be present in each room per the register. This becomes the expected-state document counters verify against reality.
3 — Execute by Room	Counters walk each room, scan barcodes, and either confirm expected assets, log unexpected assets, or mark missing items. Optional per-room signature capture documents chain of custody for the count itself.
4 — Reconcile	Discrepancies flow into a reconciliation queue and each requires an action — relocate, update condition, mark for disposal, or file an incident. The audit cannot be closed until every discrepancy has an action.

The efficiency gain is measurable. Rather than manually reconciling a paper count against a spreadsheet register over several days of clerical work, the reconciliation queue flags every discrepancy in real time as counters work.

8.3 Federal Grant Equipment

Federal grants impose additional data requirements per asset — grant identifier (CFDA number, award ID), federal share percentage, disposition threshold, and biennial inventory certification. The AMS captures these at registration and produces the Federal Grant Reconciliation Report, which pulls all grant-funded equipment into one document sized for auditor submission.

A district managing several federal grants simultaneously would otherwise need to maintain a separate spreadsheet per grant and reconcile it manually every two years; the report replaces that clerical effort with a one-click export.

8.4 California Education Code § 35168

Education Code § 35168 requires California public schools to inventory equipment valued at \$500 or more. The dedicated Ed Code 35168 Dashboard tracks assets subject to this threshold, highlights items whose current market value crosses or approaches the threshold, and produces the annual report expected by the county office of education.

Because the dashboard reads the same register that supports every other capability, the district cannot inadvertently miss an item that has appreciated across the threshold — a common gap in spreadsheet-based tracking.

8.5 The Compliance Tracking Dashboard

A single dashboard maps every compliance standard the district is subject to — CSAM 410, GASB 34, GASB 87, GASB 96, Ed Code 35168, federal Uniform Guidance — to the features that satisfy each requirement, with current pass or fail status. This is a leadership-facing artifact: rather than reading each standard and interpreting how the district complies, the CBO opens the dashboard and sees the current state at a glance. The clarity has practical value at board meetings and during executive briefings, where the difference between “we think we are compliant” and “the dashboard confirms compliance with these six standards” is significant.

8.6 Supporting Internal and External Auditors

Three specific features support auditor engagement. The Auditor Read-Only role grants an outside auditor scoped, read-only access to the register, audit trail, and reports without any risk of modification — the auditor can pull evidence directly without a business office intermediary. Point-in-time snapshots allow reports to be rendered “as of” any historical date, which is essential for reproducing prior-year figures during a subsequent audit. Evidence export produces PDFs with hash-embedded metadata that can be included in an audit evidence package, giving the auditor a tamper-evident record they can rely on.

09

SECTION 09

Reporting & Exports

One report dashboard grouped by purpose, plus domain-specific export modals for bulk extraction.

9.1 A Single Report Dashboard, Grouped by Purpose

The Reports section is the single home for all standard outputs, grouped by the purpose they serve:

REPORT GROUP	REPRESENTATIVE REPORTS & AUDIENCE
Board & executive	Asset counts by category, book value summaries, five-year trend charts — the material a CBO takes to a board meeting.
Financial & audit	Capital Asset Roll forward, Capital Asset Reconciliation, Depreciation Schedule — the material an auditor requests during fieldwork.
Compliance	CSAM 410 Compliance Report, Federal Audit Report, Federal Grant Reconciliation, Ed Code 35168 Report — the material submitted to regulators.
Operational	Custody Aging, Maintenance Cost by Asset, License Utilization, Warranty Expiring Soon — the material operational leaders review weekly and monthly.

9.2 The Report Generation Flow

Generating any report follows the same pattern. The user opens the report, sets parameters (date range, site scope, category scope, group-by), previews the result on-screen, and exports to PDF for print-ready delivery or to CSV or Excel for downstream analysis. PDF rendering uses jsPDF, which produces documents that are consistent across users and printable without further formatting. Because the parameters and outputs are consistent, a report run by one user and a report run by another user on the same parameters produce identical results — an important property for auditability.

9.3 Export Modals for Bulk Extraction

Three domain-specific export modals support bulk extraction beyond canned reports. The Asset Export Modal lets the user choose columns, filters, and format for bulk asset extraction — for example, extracting every active laptop across the district with acquisition cost and current book value for an insurance renewal. The Subscription Export Modal extracts subscription detail for renewal planning, giving the IT director a workbook to work through with vendors. The License Export Modal extracts license inventory for true-up and audit preparation.

9.4 Real Use Cases That Reports Answer

A few concrete use cases illustrate how the reporting layer replaces manual work. For an insurance renewal, the district runs an asset export filtered to active assets with book value above \$1,000, grouped by site — what was previously a two-week process of merging spreadsheets from site secretaries becomes a two-minute export. For a year-end board report, the district runs the Capital Asset Roll forward for the fiscal year and the asset counts by category summary, both printing directly into the board packet.

For a grant close-out, the district runs the Federal Grant Reconciliation for the closing grant, producing the exact document the federal program office expects. For a license true-up, the district runs the license utilization report to identify over- and under-provisioned SaaS products; on a \$500,000 annual SaaS spend, right-sizing typically returns five to fifteen percent of that spend — \$25,000 to \$75,000 per year — without reducing any user's productive access. For an insurance claim, the district runs the asset detail with photos and cost basis for the affected asset, producing a single-page submission that shortens the claim cycle.

Saving frequently used parameter sets as report presets eliminates re-entry every month or quarter and ensures that recurring reports are always run against the same parameters — another quiet source of audit-relevant consistency.

10

SECTION 10

Notifications & Alerts

A permission-aware inbox, nine alert categories, per-user preferences, and an escalation chain.

10.1 The Inbox — Alerts as an Attention Layer

The Alerts inbox is a per-user activity stream showing every system-generated event that requires attention. Alerts can be filtered by category, severity, and status (Unread, Acknowledged, Dismissed, Resolved). The inbox is the mechanism through which the platform proactively surfaces upcoming and overdue work rather than waiting for the user to notice it. Because alerts are user-specific and permission-aware, a warehouse operator does not receive alerts intended for the finance director and vice versa.

10.2 The Nine Categories of Alerts

ALERT CATEGORY	WHEN IT FIRES
Maintenance Due	Preventive work orders coming due at a configurable lead time.
Maintenance Overdue	Preventive work is not completed by its due date.
Warranty Expiring	Assets whose warranty ends within 30, 60, or 90 days — prompting vendor-covered service before the window closes.
License Expiring / Renewing	Software or SaaS subscriptions approaching renewal — giving IT and finance time to negotiate rather than react.

ALERT CATEGORY	WHEN IT FIRES
Custody Overdue	Loaner assets are not returned by their expected return date.
Audit Milestones	Inventory audit phase transitions and reconciliation items awaiting action.
Compliance Deadlines	Biennial certifications, annual inventory windows, and grant close-outs.
Incident Reports	New asset damage or loss reports requiring follow-up.
System Events	Data import completions, bulk operations, and permission changes.

10.3 Notification Preferences

Each user manages their own preferences under Settings > Notifications, controlling per-category channel (in-app only, email, both, or off), per-severity behavior (always notify on Critical, digest daily on Informational), and digest frequency (immediate, hourly, daily, weekly). This per-user configuration is important because the finance director and the warehouse operator have different tolerance for volume and different working rhythms. A well-configured inbox is one that surfaces exactly what the user must act on and no more.

10.4 The Escalation Chain

Alerts unacknowledged past their SLA escalate to a supervisor. For example, an unresolved Custody Overdue alert first pings the custodian, then after seven days escalates to the site administrator, and after fourteen days escalates to the asset manager and files an incident record. The escalation chain is what turns alerts from a passive display into an active accountability mechanism — an item cannot simply be ignored indefinitely because the escalation path guarantees that supervision engages if the responsible party does not.

10.5 Example — Preventing an Adobe License Lapse

WORKED EXAMPLE

Consider a district's Adobe Creative Cloud subscription that renews on November 15. Under the AMS, alerts fire on a staged schedule. On September 15, sixty days before renewal, the first alert routes to the IT director in-app and by email, giving time to evaluate whether the current seat count is still appropriate. On October 15, the second alert fires with the current seat utilization report attached, giving concrete evidence for a right-sizing decision. On November 1, fourteen days before renewal, the third alert also routes to the finance administrator so a purchase order can be raised. On November 15, if the renewal has not been marked complete, the alert escalates to Critical and pings the CBO. The result is that no lapse occurs, no emergency purchase at list price happens, and no compliance gap opens for the users who depend on the software.

11

SECTION 11

Cross-Feature Use-Case Scenarios

Four scenarios that show the compounding value when modules combine into a coherent platform.

The value of the platform is most visible when several features work together on a single business scenario. The four scenarios below illustrate the compounding effect.

11.1 Procurement to Register to Depreciation to Audit

A site principal requests a new laptop for a newly hired teacher, and the procurement office issues a purchase order to Apple. When the laptop is received in the warehouse, the receiving operator scans the shipping label and creates the asset record, entering the PO number as the acquisition reference, the acquisition cost from the invoice, and the funding source as “General Fund.”

The category “Computer — Laptop” is selected, which automatically applies the five-year useful life, straight-line depreciation method, and \$5,000 capital threshold defined at the category level. Because the acquisition cost is \$2,199 — below the capital threshold — the system records the asset but expenses it rather than adding it to the capital account, without any user thinking about the rule.

A barcode label prints and is applied. The operator then checks the laptop out to the new teacher via the checkout workflow; the teacher signs on the touchscreen and takes the device. At year-end, the asset appears in the Depreciation Schedule (as an expensed non-capital item), does not appear in the Capital Asset Roll forward, and appears in the annual inventory audit's precount sheet for the teacher's classroom.

When the compliance officer runs the CSAM 410 inventory the following spring, the counter walks into the classroom, scans the laptop, and reconciles it in a single motion. The entire life of the asset — from PO to inventory — is recorded once and flows automatically into every downstream artifact.

11.2 Warranty Expiration to Refresh Planning to Board Justification

A three-year warranty on a fleet of one hundred and twenty Chromebooks purchased in 2023 approaches expiration in 2026. The Warranty Expiring alert fires ninety days before expiration, giving the IT director time to evaluate the fleet. Because each Chromebook's maintenance history is on its asset record, the director can see which units have already required repair, which are still in perfect condition, and what the average cost per intervention has been.

Combining that history with the units' current book values (nearly zero, given the three-year useful life for the category), the director generates a refresh plan for one hundred and twenty units, projected across the following fiscal year.

The refresh plan is then combined with equivalent plans for laptops, projectors, and interactive displays into a multi-year replacement forecast that the CBO takes to the board with specific serial numbers, specific expected replacement costs, and specific historical maintenance evidence for each category. What would have been a soft ask (“we need to refresh the Chromebooks”) becomes a defensible capital request grounded in data.

11.3 License Utilization to True-Up to Renewal

The district's Adobe Creative Cloud subscription for twenty-five seats approaches its November 15 renewal. The License Expiring alert routes the license utilization report to the IT director sixty days out. The report shows that only sixteen seats have been actively used in the past six months, meaning the district is paying for nine unused seats at approximately \$600 per seat per year, or \$5,400 per year of avoidable spend.

The IT director reassigns the unused seats internally where possible, right-sizes the renewal to twenty seats (a conservative buffer), and issues a purchase order through the finance administrator when the November 1 alert fires. The renewal completes on time at a lower cost, and the license utilization report becomes evidence for future right-sizing conversations with other SaaS vendors.

11.4 Damage Incident to Work Order to Insurance Claim

A teacher returns a district-issued iPad with a shattered screen. During the check-in workflow, the warehouse operator inspects the device, notes the damage, and files an incident record. The incident automatically opens a maintenance work order routed to the IT repair queue. The work order captures before-photos of the damage, and the technician's diagnosis identifies the repair as beyond the warranty (the device is out of warranty).

The maintenance history on the asset now shows the incident, the repair cost, and the elapsed time to

resolution. Because the incident was captured with the returning teacher's signature and photographic evidence at the moment of return, the district has defensible documentation for the incident. If the damage is covered by the district's property insurance, an asset detail export with photos and cost basis is generated and submitted as the claim package. The full chain of events — from the moment of return through claim submission — is documented in the asset record without any external system involvement.

12

SECTION 12

Glossary

Terms of art used throughout this overview, defined for the business office reader.

AMORTIZATION

The digital-asset equivalent of depreciation — the periodic expensing of an intangible asset's cost over its useful life.

ASSET

Any item of value the organization tracks, either physical (equipment, vehicles, furniture) or digital (licenses, subscriptions, cloud entitlements). The central record everything else refers to.

ASSET TAG

The organization-assigned identifier printed on a barcode or RFID label affixed to the physical asset — the bridge between the physical world and the register.

AUDIT TRAIL

The immutable log of every change made in the system, used for investigations and audits. Its immutability is what makes it usable as evidence.

BOOK VALUE

Original cost minus accumulated depreciation — the accounting value today. The number reported to insurers, the board, and auditors.

CAPITAL THRESHOLD

The dollar amount above which an asset is capitalized and depreciated rather than expensed; typically set between \$2,500 and \$5,000 in public-sector organizations.

CATEGORY

A classification that drives depreciation policy, useful life, capital classification, and reporting groupings. How the district manages policy at scale.

COMPLIANCE STANDARD

A specific external requirement the system helps satisfy — CSAM 410, GASB 34/87/96, Education Code § 35168, or federal Uniform Guidance 2 CFR 200.313.

CSAM 410

California School Accounting Manual Procedure 410, governing physical inventory of public school property.

CUSTODIAN

The individual or department that is currently accountable for an asset. Distinct from the district as owner.

CUSTODY

The current responsibility assignment for an asset, backed by a signature and captured in the custody history. What makes accountability enforceable.

DEPRECIATION

The systematic allocation of a physical asset's cost over its useful life. Drives the book value that feeds insurance, board reporting, and audits.

DIGITAL ASSET

An intangible asset such as a software license, SaaS subscription, or cloud entitlement — different fields and amortization logic, same platform.

DISPOSAL

The formal removal of an asset from active service with a recorded reason and disposition method. Every disposal is audit visible.

ED CODE 35168

The California Education Code section requiring public schools to inventory equipment valued at \$500 or more.

FEDERAL GRANT EQUIPMENT

Equipment acquired as a whole or part with federal funds, subject to additional tracking and disposition rules under 2 CFR 200.313.

INCIDENT

A record of asset damage, loss, or an unusual event, often generated automatically during checkin. Feeds insurance claims and loss investigations.

INTANGIBLE ASSET

A digital or non-physical asset carried on the books, such as a perpetual software license. Intangibles amortize rather than depreciate.

INVENTORY AUDIT

A structured physical count that reconciles the register to physical reality, supporting the four-phase model required under CSAM 410 and federal grant rules.

LICENSE METERING

The tracking of how many seats of a subscription or license are actually in use. Drives right-sizing decisions at renewal.

PHYSICAL ASSET

A tangible item — equipment, furniture, vehicle, hardware — with a location and typically a barcode or RFID tag. Requires a room-level location.

PRECOUNT

The audit phase in which the system generates the expected asset list for each room prior to counting.

RECONCILIATION

The audit phase in which discrepancies are resolved, and the register is aligned with reality. An audit cannot close with unresolved items.

REFRESH PLAN

A multi-year projection of assets due for replacement based on age, useful life, and condition. Converts intuition into defensible budget requests.

RFID

Radio-Frequency Identification — a tag technology read wirelessly, enabling rapid warehouse-scale scanning of dozens of assets in a single sweep.

SACS CODE

Standardized Account Code Structure code used in California public-sector accounting to classify expenditures.

SALVAGE VALUE

The estimated residual value of an asset at the end of its useful life; a floor below which depreciation does not go.

SBITA

Subscription-Based Information Technology Arrangement, defined and governed by GASB Statement 96, requiring a right-to-use asset and subscription liability.

SITE / BUILDING / ROOM

The three-level location hierarchy every physical asset resolves to. Room-level granularity is what makes efficient physical inventory possible.

USEFUL LIFE

The expected number of years an asset delivers service. Set at the category level and used to compute depreciation.

WHAT3WORDS

A geolocation system assigning a unique three-word address to every three-meter square on earth, used for precise field pinning of outdoor and portable assets.

WORK ORDER

A record of a specific maintenance task, preventive or corrective, tied to an asset — capturing labor, parts, cost, and photographic evidence.

13

SECTION 13

Conclusion — A Unified Platform

How the modules reinforce each other, and the highest-leverage starting point for a new CBO.

The eleven capability areas described in this document are not eleven separate products. They are one platform in which each capability reinforces the others. Registration produces a record. Tracking makes the record visible. Custody makes accountability enforceable. Location makes physical inventory efficient. Maintenance keeps the record current on service history. Depreciation keeps the record current on financial value. Compliance keeps the record aligned with external obligations. Reporting turns the record into decision-useful output. Alerts convert the record into forward-looking attention. And the audit trail turns everything the record has ever said into defensible evidence.

The compounding value shows up across four dimensions the business office cares about. Accuracy improves because data is entered once and flows through every downstream artifact rather than being retyped into disconnected spreadsheets. Compliance readiness improves because the reports auditors expect are produced by the same register that operations use every day, eliminating the reconciliation gap that produces most audit findings. Cost control improves because underused subscriptions, in-warranty repairs, and aging fleets become visible and actionable rather than hidden in aggregate spend. Operational speed improves because transactions that used to require minutes and reports that used to require days both drop into seconds and minutes respectively.

THE HIGHEST-LEVERAGE STARTING POINT

For a Chief Business Officer beginning to work with the platform, the highest-leverage starting point is registration discipline. Every capability described in this document builds on the record established at registration; a district that invests in complete, consistent registration at intake will see the platform's full value emerge naturally over the following year as maintenance history, depreciation figures, inventory audits, and compliance reports all draw from that clean foundation. A district that treats registration as an afterthought will see the platform's value degrade in the same way spreadsheets do. The system is designed to reward discipline, and discipline starts at the front door.

A UNIFIED PLATFORM

**One record. One register.
One platform.**

The system is designed to reward discipline, and discipline starts at the front door.

Confidential · Internal Distribution

Confidential · Internal Distribution

Confidential · Internal Distribution

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