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Property Management Webpage
http://www.finance.upenn.edu/comptroller/accounting/property/

Property Management Policies
http://www.finance.upenn.edu/vpfinance/fpm/1100/1106.0.shtml

Property Management Documentation
http://www.finance.upenn.edu/ftd/documentation.html

Property Management Forms
http://www.finance.upenn.edu/comptroller/forms/#PropMan

Property Management Category Codes

Contacts

Property Management Group
Office of the Comptroller
317 Franklin Building
3451 Walnut Street
Philadelphia, PA 19104
215-898-7330
property@pobox.upenn.edu
Glossary of Terms

Acquisition Date

Generally the last day of the month in which a paid invoice was generated for the property item – not the receipt date or the date the item was placed in service.

Acquisition date is system-generated when a final payment is posted to a property item, so it will remain blank until final payment is made.

Category Code

A code used to identify the general category of equipment to which a property item belongs. At the University of Pennsylvania, asset categories are divided into approximately 20 major groups. Each of these groups has more specific asset categories associated with it. These specific categories are members of the group.

Examples of group-level categories are “office equipment”, “scientific equipment”, etc. Within the category group “office equipment”, there are more specific categories such as “calculators/adding machines”, “typewriters”, etc.

Group-level category codes always end with three zeros; the specific category codes that are members of this group begin with the same first two digits. For example, the group level category code for “office equipment” is “02000”, categories within this group are “02010” (calculators/adding machines) and “02020” (typewriters).

A group-level category code cannot be assigned to a property item; only a category code that is a “member” of a group-level code may be assigned to a property item.

The system obtains specific default data for a property item, such as useful life and class code, based on the property item’s Category. These default values can be changed online by the PMG.

Custodian

The individual that is responsible for the property item. This is frequently, but not necessarily, the person that is using the item. Custodians must be employees of the University.

Disposition

The status of a property item relative to the University’s property inventory. Only “active” property items are tracked as part of the inventory. “Incomplete” items are not considered part of the inventory until they are fully paid for (become “active”). “Retired” property items have been disposed of and are no longer part of the inventory.

FCG

Federal Compliance Group a.k.a. Property Management Group
Glossary of Terms (continued)

ORS

Office of Research Services

Owning Center

The responsibility center associated with the organization that is responsible for the property item ("owning" organization). In most cases, the owning organization is the organization that is using the property item and not necessarily the organization that purchased the item.

Owning organization and its associated owning responsibility center are used to regulate update access by non-PMG users to all information about a specific property item. A property item may be updated only if the user's organization affiliation matches the property item's owning organization or if the user's center affiliation matches the property item's owning center depending upon whether the user has organization-level or center-level security, respectively.

PMG

The Property Management Group (PMG) is the business unit within the Comptroller's Office that is charged with the responsibility for compliance with all University and regulatory agency policies and procedures regarding property management. The PMG is also responsible for ensuring that all property items valued at $5,000 or more for which the University retains title are tagged and inventoried properly.

Property Administrator

This individual provides the main line of communication concerning equipment between the organization and the Property Management Group within the Comptroller's Office. The PMG is dependent upon the Property Administrator to maintain a complete and accurate inventory of the University's equipment.

SEMS

Space and Equipment Management System

Tagging Contact

The individual whom the PMG contacts to send the property tags and/or resolves any questions during the tagging process. Tagging Contacts must be employees of the University.
Roles & Responsibilities

There are five main roles in managing property:

- Buyer
- Property Management Group
- Property Administrator
- Custodian
- Tagging Contact

Buyer

The Buyer is the PO Manager who creates and/or approves the purchase order (PO) which acquires the property item.

Though Buyers don’t have a role in the PMS, key information from the PO is used when creating a property item in the PMS.

The Buyer must ensure property management information on the PO is complete and accurate. This information includes:

Property Management Group

The Property Management Group (PMG), within the Comptroller’s Office, oversees all University property.

The PMG is responsible for:

- Ensuring compliance with all University & regulatory agency policies & procedures
- Reviewing and adding financial assets greater than $5,000 to the asset management system
- Role: Property Management Group (cont.)
- Recording all financial transactions to the General Ledger involving the assets, i.e. dispositions, transfer of assets to other ORGs, cost adjustments, and depreciation
- Sending tags to Tagging Contacts
- Recording certain changes/edits in the Property Management system
- Movement of item(s) from one building to another
- Movement of item(s) from one CNAC or ORG to another
- Changes in disposition, i.e. disposal, sale, etc.

Property Administrator

A person designated by their School/Center as the liaison between their organization and the PMG on all property issues.

- Coordinates the property management activities of their assigned area(s)
- Records certain changes/edits in the Property Management system
- Maintains complete and accurate inventory of their areas equipment
- Manages the disposal process, including disposal forms
Roles and Responsibilities (continued)

Custodian

An individual responsible for the physical custody of the property item. This is generally, but not necessarily, the person that is using the item. The Custodian is specified on the Purchase Order created by the Buyer. This person must be a Penn employee.

Tagging Contact

An individual responsible for tagging the property item. The tags are supplied by the Property Management Group (PMG). The Tagging Contact also sends notification to the PMG and the Property Administrator of the item(s) tagged (item and tag #) when tagging is completed. The Tagging Contact is specified on the Purchase Order created by the Buyer. This person must be a Penn employee.
Addition to the Property Management System

At the Department level, representatives will make an economic decision to acquire plant assets in accordance with University guidelines. Once the decision has been made, a purchase order is created in BEN Buys. Once the asset is purchased, this financial transaction will appear in the general ledger also known as BEN Financials. Each month the Property Management Group (PMG) will run a GL Activity Report in order to identify all property acquisition transactions that were entered in BEN Financials. These entries are reviewed against the University's Capitalization Policy, 1106.1 to determine whether or not they are to be capitalized. Any assets capitalized in error are required to be expensed by the originating department. All qualifying additions will be added to the Property Management System by the PMG.

Requisition

When an equipment item that qualifies as a capital asset is to be purchased, the Buyer must change the default object code from an expense object code (5xxx) to an equipment object code (183x) in the requisition. This allows a set of fields to be made available to the Buyer to input additional property information related to the equipment. This information, as input by the Buyer, is later added to the Property Management System by PMG. These property fields are:

1. **Description** - For equipment items selected from the Penn Marketplace, the Marketplace description is the default description. For equipment items ordered on a non-catalog requisition, the Description must include an English language description of the item, including the Manufacturer's name and Model # with as much additional detail as possible.

2. **Installation Location** - This is where the item is being placed for use and not the deliver to location or department name.
   - The format for this information is Building, Floor and Room
   - The Building, Floor and Room information should match the information found in Space@Penn and/or Facilities. For additional information on University Buildings go to [http://www.facilities.upenn.edu/mapsBldgs/](http://www.facilities.upenn.edu/mapsBldgs/)

3. **Category Code** - The category field drives the appropriate depreciation method, i.e. the number of years the item will be depreciated. For example, a freezer may have a useful life of 10 years. If the wrong category is selected or if the default category remains, the wrong depreciation amount may be expensed annually over the life of the asset selected, which may not agree to the life of the asset purchased.

   From the drop down box, select the most accurate description of the item being purchased. Be careful not to leave the field with the default category "Absorber" selected, unless an absorber is being purchased.

4. **Responsible Organization** - This defaults from the organization number(s) entered. Type or select the appropriate responsible organization for the property item.

5. **Govt. Retain Title?** - For items purchased with sponsored program funds, the government may retain title. If so, select 'Y'; if not, leave the default 'N'.

6. **Custodian of Item** - The individual that is responsible for the property item. This is frequently, but not necessarily, the person that is using the item. Custodians must be employees of the University.

7. **Tagging Contact** - This is the individual that is responsible for receiving the property tags from PMG and who will physically tag the property. Tagging Contacts must be employees of the University.

8. **Tagging Contact Phone Number** - Type in the phone number of the tagging contact.
Addition to the Property Management System (continued)

Receipt and Payment of Asset
Once the requisition has been completed and approved, it is sent to the supplier who then fills the order and delivers the equipment to the Department. Once the equipment is received in the Department, it must be receipted against the purchase order in BEN Financials.

The invoice is received by Accounts Payable and compared to the receipted assets. If they are in agreement the invoice is then paid.

Addition to Property Management System
On a monthly basis, the PMG runs a GL activity reports that lists all the entries to object codes 1830 to 1833, including payables feeds, manual journals, etc., for the prior month.

The PMG reviews the supporting documentation for all purchases and determines whether the purchase meets the capitalization criteria in the University policy. If so, it then adds the asset to the Property Management System. The last day of the prior month (the month the asset was paid) is entered as the acquisition date. If information is incomplete or inaccurate the PMG will contact the Department for the missing information. If the purchase does not meet the capitalization criteria, PMG will contact the Department and request that it prepare a journal to move the charge from the asset account to an expense account.

Asset Tagging
After the asset has been added to the Property Management System, the Property Management Group will forward to the Tagging Contact a list of the property items added to the system along with a property tag for each property item. The Tagging Contact should locate the property items and affix a property tag to each item. The Tagging Contact should note next to each item on the list the tag number assigned. Once all of the items have been tagged, the Tagging Contact should inform the PMG that the items have been tagged and their assigned tag numbers.

At this point, the PMG will download these items into a hand-held scanner and input the tag numbers. PMG will then upload into the Property Management System the items with their new tag numbers. During the download process, the property items will be frozen and will not be available for update. After the tag numbers are uploaded, the items will no longer be frozen and will be available for future updates.
Figure 1.0 Additions to Property Management from BEN Buys

Property Management Addition to the Property Management System from BEN Buys

Department Creates Requisition in BEN Buys - should use appropriate object code 1830 - 1833

Department Inputs Installation Location - Must Include Building, Floor & Room NOT Deliver-To Address or Dept Name

Department Selects Category Code from Drop Down Menu

Department Selects RESP ORG from Drop Down Menu

Department Answers Question Gov't Retains Title? Y or N

Department Inputs Custodian Name and Tagging Contact w/Phone # Both Must be University EE

Is it an Asset*

Yes

No

Department Charges to Expense on Requisition

Is the Asset Total Cost Over $5,000, Over One Year Useful Life AND will University Retain Title?

Yes

PMG Runs GL Activity Report for Object Codes 1830 - 1833

No

AP Pays Invoice

Supplier Invoices University

PMG Sends Tag to Department

Department Tags Asset & Notifies PMG

PMG Updates Tag #

PO Created and Sent to Supplier

PMG Notifies Department to Charge to Expense via Manual Journal Entry

Department Updates Tag #

PMG Inputs Asset into Property Management System

Supplier Invites University

Department Tags Asset & Notifies PMG

PMG Sends Tag to Department

PMG Notifies Department to Charge to Expense via Manual Journal Entry

PMG Updates Tag #

PO Created and Sent to Supplier

PMG Notifies Department to Charge to Expense via Manual Journal Entry

Figure 1.0 Additions to Property Management from BEN Buys

*Asset Criteria: Item over $5,000, Useful Life of More than One Year & the University has Title to Asset
Chapter 1 Introduction

1.1 In This Chapter

This chapter provides background information on the Property Management System and highlights the organization of the Property Management User Manual.

This chapter is subdivided as follows:

“The Property Management System” provides background information on the development of the current system, outlines benefits of the current system, defines the term “property”, and presents a brief description of the Property Management tracking activity and system structure.

“About this Manual” defines the purpose of the Property Management User Manual, the audience of the manual, and the typographic conventions used in the documentation of procedures.

“Keyboard Maps” provides keyboard translation maps for six different terminal emulation modes used to access the Property Management System.

“Organization of this Document” provides an overview of the chapters in the Property Management User Manual and a brief description of each of those chapters.
1.2 The Property Management System

Background

The Property Management System was created in response to a federal audit that identified some serious weaknesses in the University’s existing equipment tracking system and its equipment management procedures. If not corrected, these weaknesses will severely limit the University's ability to purchase equipment under federal grants and contracts. These weaknesses included:

- Equipment purchases were not tagged, which made physical inventories difficult and exact identification uncertain.
- The main sources of information, paid invoices and purchase orders, did not include information about who was responsible for the property or where it would be located.
- There was no method to identify individuals responsible for property within specific departments.
- Changes in location of equipment went undetected because there was no existing procedure for notifying central property management personnel of such changes.

Current System Features

The Property Management System, together with clearly documented policies and procedures address these issues and offer additional features and benefits.

- When creating a requisition for equipment the following information is required to be completed:
  - Description
  - Installation Location
  - Category Code
  - Responsible Organization
  - Govt. Retain Title. Y or N
  - Custodian of Item
  - Custodian Telephone
  - Tagging Contact
  - Tagging Telephone

- An individual(s) in each organization has been designated as the Property Administrator for that organization. This individual(s) is the liaison between the Organization and the Property Management Group (PMG) within the Comptroller's Office on all issues, policies, and procedures relating to property management.

- The property items are now be tagged by the Tagging Contact, which improves the accuracy of information recorded in the system and facilitate physical inventories.

- The University is able to calculate a more accurate depreciation of its assets to recover their cost over a shorter period of time.

- The Property Management System allows users to participate directly in record-keeping activities about property in their organizations, thus improving the accuracy of the information recorded in the system and reducing the need for separate departmental tracking systems. For example, users are able to update the Property Management System for the following fields:
  - Manufacturer
  - Model Number
  - Serial Number
  - Description
  - Custodian Name
  - Tagging Contact Name
  - Tagging Contact Phone Number
  - Floor and Room
  - Condition
  - In Use
  - Surplus
  - Mark for Retirement
1.2 The Property Management System (continued)

- Users are able to track property based on its custodian, thereby improving tracking of the disposition of such items throughout the University.

- The Property Management System allows users to flag property items as surplus, which facilitates the distribution of such items throughout the University. Surplus items must be removed from the general ledger and any loss must be recognized, if not fully depreciated.

- Users are able to generate customized reports about property in their organizations.

Definition of Property

A property item is any item valued at $5,000 or more that has a useful life of more than one year and to which the University retains title. Property items with a value of $5,000 or more are tagged and inventoried.

Property Tracking

The Property Management System tracks property items from acquisition through disposal. Items that are disposed of ("retired") are kept on the system until the end of the fiscal year in which they are retired.

For the most part, property items purchased by University organizations are identified and then recorded in the system based on reports that identify transactions from the University's Accounting System (a.k.a. BEN Financials) specifically, charges and credits against property object codes. These object codes include: 1820 and 1830 – 1833 in the BEN financial system.

Thus the event that usually triggers record-keeping activity in the Property Management System is not the Equipment Requisition or the Purchase Order (although both of these documents are used as source documents), but the processed invoice. This means that there will generally be a six to eight week delay from the time a piece of property is requisitioned until the time a record is created for it in the Property Management System. Consequently, the “Acquisition date” recorded in the system for a property item is generally the last day of the month in which the item was paid for and not the date it was delivered or placed into service.

Periodic inventories of equipment are performed on a regular, ongoing schedule.

The Property Management System supports six major functions, each of which is represented as a top level item on the Main Menu. Each major system function has its own sub-menu that lists a number of options, or screens, that allow users to perform various activities in the system.

Figure 1-1 shows the organization of the On-Line Property Management System.

Only authorized individuals can create records, delete records, and modify cost/account information about property items in the Property Management System. Authorized individuals can use the system to maintain information about property in their organizations, including descriptive information, location, custodian, and tagging contact. The system also provides a "comment" facility for adding unstructured text about various topics including, for example, maintenance contracts.

Note on Configurations

Multiple property items that are physically connected together form a single logical unit (a “configuration” such as a PC, monitor, keyboard and printer) are handled differently depending on how they were ordered. If the items were purchased on the same purchase order, they will probably be combined and
recorded in the system as a single property item. If the items were purchased on different purchase orders, they will be recorded in the system as separate property items.
Property Management On-Line System Flowchart

Figure 1-1 Property Management On-Line System Flow Chart
1.3 About This Manual

Purpose

The purpose of the Property Management User Manual is to record and briefly describe how to perform a variety of functions within the Property Management System.

Audience

This document was prepared for those people who maintain information about property items in their particular organizations.

Access and Security

To maintain property items in the Property Management System, users need access to the financial area of the CICS region of the University's administrative mainframe. To obtain a UMIS Logon ID that permits access, you will need your Business Administrator and Access Administrator's approval. The user should also register for Property Management Training and complete a “Request for Administrative Mainframe Logon ID and Related Services” form. When completing the form, be sure to include the CNAC(s) OR ORG(s) for which you will be responsible. Users will only have access to property items within their ORG or CNAC depending upon the permission granted on the Logon Form.

The Logon Form can also be printed from the Document/Forms library in the Comptroller’s Website. The form is in the Property Management section. Once completed signed by the appropriate approvers, including the Financial Training Department, the form will be forwarded to the ISC System Administrator.
1.4 Organization of This Document

In addition to this introduction, the Property Management User Manual contains the following chapters.

- **Glossary** provides a list and definition of key terms in the Property Management System.

- **System Conventions** which describe the Property Management features that are common to two or more options in the system.

- **Entry and Exit Procedures** provide instructions for entering and exiting the Property Management System.

- **Quick Reference Guide** provides a list of functions and the corresponding screens and procedures to follow to perform these functions.

- **Item Inquiry** provides instructions for displaying information about property items.

- **Maintaining Property Items** provides instructions for updating information about property items in the Property Management System.

- **Search functions** provides instructions for retrieving lists of employee names, University organizations, University buildings, floors and rooms within these buildings, and property items associated with a specific Purchase Order number from the Property Management System.

- **Standard Reports** provides instructions for selecting, customizing and submitting report requests in the Property Management System.
Chapter 2 System Conventions

2.1 In This Chapter

This chapter describes Property Management features that are common to two or more options in the system.

It is subdivided as follows:

“Screen Formats” describes and illustrates the screen formats in the Property Management System.

“The Function/Option Prompt” provides instructions for moving from one screen to another using the Function/Option prompt.

“Item ID and Tag Number” describes the item ID and tag number, provides instructions for retrieving property item records.

“PF Keys” defines the PF (program function) keys in the Property Management System.

“Online Help Facility” describes the online Help facility in the Property Management System and gives instructions for using it.

“Using Search Functions from Data Entry Screens” gives instructions for using Property Management search functions from data entry screens.
2.2 Screen Formats

Overview

Each of the online screens in the Property Management System is divided into three parts: the header, the footer and the activity region. The header, which comprises the first three lines on the screen, identifies the system, the program name, the date and time and the function and option that is selected from the system menus to get to the screens.

The footer comprises the last two lines on every screen. The first line lists function keys PF1 through PF 12. The second line lists the functions of each PF key that can be used from that screen. If a function is not listed beneath a function key, that key cannot be used from that screen.

The activity region is the area between the header and the footer. It is different for every screen in the system. However, the activity regions can be divided into three categories based on format. Screens with the same format are used the same way.

The types of screens are:

- Menu screens
- Data entry screens
- Scroll screens

The remainder of this section describes and illustrates these screen types.
2.2 Screen Formats (continued)

Menu Screens

The first screen that is displayed when the Property Management System is accessed is the Main Menu as illustrated in Figure 2-1.

![Figure 2-1 Main Menu Screen](image)

The Main Menu lists the nine sub-system menus in the Property Management System. Of these nine sub-systems, only three are available to users outside of the Comptroller's Office. To display a sub-system menu, type the two-digit number of the applicable sub-system following “Enter requested system function”, and press ENTER.

This screen is configured and used just like the other menu screens in the system. It displays a list of options from which one can be selected. When a selection is made from the Main Menu, it is actually a selection of another menu rather than a specific screen. For further discussion of functions/options, see the “Function/Option Prompt” section of this chapter in section 2-3.

Often, optional information is requested on a menu screen (for example, “Enter screen option for function selected”). Nothing has to be typed following the optional prompts. These are there in order to hasten the user’s procedures. Optional information can always be typed on the following screen.
2.2 Screen Formats (continued)

Data Entry Screens

Figure 2-2 illustrates the Update Description/Custodian screen, which is an example of a data entry screen.

![Figure 2-2 Data Entry Screen](image)

Every data entry screen in the Property Management System is organized so that information can be added or modified by TABbing from field to field. The cursor only stops on fields in which information can be typed.

Scroll Screens

A scroll screen is just a list of information that is too long to fit on the screen. To view more of the list, press PF8. To scroll back to a part of the list that has already been viewed, press PF7.

Most of the scroll screens in the system also provide a capability both to specify a starting point for the list and to reorder the list either based on a numeric code or alphabetic name.

The scroll forward PF8 function will only scroll through 50 pages of information. Since the complete list may exceed 50 pages, it is recommended to use the “Starting From” prompt at the top of the screen to position the search as close to the requested information as possible.
2.3 The Function/Option Prompt

Overview

The Function/Option prompt is used throughout the Property Management System to move from screen to screen without returning to a menu. “Function” refers to a sub-system. The sub-systems in Property Management are listed on the Main Menu. “Option” refers to a specific screen within the subsystem.

Moving from one screen to another can be accomplished by using this prompt with the exception of “hidden” screens. A hidden screen is the second page of a screen which can only be accessed from its own first page.

To move to another screen using the Function/Option prompt, simply TAB to the characters following that prompt (the function and option of the displayed screen), type the four-digit number of the screen which the user wants to move to (without a tab, space or a slash between the function and option), and press ENTER. As an alternative, the user can press the “Home” key to have the cursor move to the Function/Option section at the top of the screen.

If the number of the needed screen is not known, press PF2 (EHELP) when the cursor is positioned at Function/Option. This displays a list of available screens and their function/option numbers. A screen can be selected from the list or a number can be noted and typed into the Function/Option field after exiting from EHELP (press PF3 to exit from EHELP).

Warning

When a new function and option are specified at the same time that other new information is specified, the system processes the function/option information (that is, displays another screen) and ignores any other information that has been typed on the screen.

If information is mistakenly typed into the function/option fields, refrain from pressing ENTER. If ENTER is accidentally pressed, another screen will be accessed and the information entered on the first screen during the current session will be lost. Instead, type the Function/Option number of the screen currently in use and press ENTER. This will cause the same screen to remain active and update the displayed record with the new information.
2.4 Item ID and Tag Number

Overview

Every property item created in the Property Management System is assigned a unique nine-digit item ID number. When a property item is tagged, it is assigned a unique nine-character tag number. The tag number primarily consists of one letter followed by eight digits. These numbers remain part of the item's record until the item is disposed of.

Tag numbers begin with the letter B. Note that not all property items are tagged, so not all items have a tag number.

To retrieve the record of a property item in the system, its nine digit ID number or its tag number must be specified. The item ID number can be obtained from the various reports available from the system (see Chapter 8 on standard reports), or, if the PO# is known, by using the List by PO number screen (see Chapter 7).

Screens that display a record of a property item usually display both the item ID number and tag number at the top of the screen, immediately beneath the header region. In this location on the screen, these fields are used to retrieve the record of another property item, not for data entry.

To use the item ID or tag number to retrieve the record of a property item, TAB to either field, type the item ID or tag number of the item to be retrieved, and press ENTER. The record of the newly retrieved item is displayed on the terminal screen.

Warning

When an item ID or tag number is specified on the same screen in which other new information is entered, the system processes the specified item ID or tag number (by displaying the new record) and ignores the other new information. Even if the same item ID or tag number is repeated, any other information that was typed into the screen will be lost (in other words, retyping the same item ID or tag number is just like pressing PF11 to cancel a transaction).
### 2.5 PF Keys

The PF (program function) keys simplify operations that might otherwise require two or more keystrokes. These are defined based on system requirements.

PF1 through PF12 are listed across the bottom of each system screen. The functions of the keys that can be used from that screen are abbreviated beneath the key. If no description of a PF key's function is displayed on a given screen, that PF key cannot be used from that screen.

The following table lists the PF keys in the Property Management System. For each key, it gives the description that appears on the screen, a decoded description, and the function.

<table>
<thead>
<tr>
<th>Key</th>
<th>Description</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>PF1</td>
<td>HELP</td>
<td>Displays a pop-up window with brief instructions for using the screen and for invoking element help for the fields on the screen.</td>
</tr>
<tr>
<td></td>
<td>(screen level help)</td>
<td></td>
</tr>
<tr>
<td>PF2</td>
<td>EHELP</td>
<td>Displays a pop-up window with a description of the field (data element) on which the cursor is positioned.</td>
</tr>
<tr>
<td></td>
<td>(element help)</td>
<td></td>
</tr>
<tr>
<td>PF3</td>
<td>PREV</td>
<td>Returns to the previously displayed screen (not to the logical previous screen).</td>
</tr>
<tr>
<td></td>
<td>(previous)</td>
<td></td>
</tr>
<tr>
<td>PF4</td>
<td>NEXT</td>
<td>Displays the logical next screen. For example, if you press PF4 from the first screen in a data entry operation, the system displays the second screen in that operation.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PF5</td>
<td>TSRCH</td>
<td>Displays either a pop-up window that lists the available search options for the screen or - if only one search option is available for that screen - the appropriate search screen. Appears on the 03/04 screen only for the Tagging Contact search.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## 2.5 PF Keys (continued)

<table>
<thead>
<tr>
<th>Key</th>
<th>Description</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>PF6</td>
<td>SRCH or CSRCH</td>
<td>Displays either a pop-up window that lists the available search options for the screen or - if only one search option is available for that screen - the appropriate search screen. Appears on the 03/04 screen only for the Custodian search.</td>
</tr>
<tr>
<td>PF7</td>
<td>BACK</td>
<td>Scrolls backward through the information on the screen. Does not function when the beginning of a list is displayed.</td>
</tr>
<tr>
<td>PF8</td>
<td>FWD</td>
<td>Scrolls forward through the information on the screen. Does not function when the end of a list is displayed.</td>
</tr>
<tr>
<td>PF9</td>
<td>CFRM</td>
<td>Confirms that a property item record is to be created, updated, or deleted based on the information on the screen.</td>
</tr>
<tr>
<td>PF10</td>
<td>Not assigned</td>
<td></td>
</tr>
<tr>
<td>PF11</td>
<td>CNCL</td>
<td>Cancels a transaction by returning all the fields in a record to their values as of the last update.</td>
</tr>
<tr>
<td>PF12</td>
<td>EXIT</td>
<td>Exits the Property Management system and returns you to your UMIS menu. The second time it is pressed, PF12 exits the administrative mainframe.</td>
</tr>
</tbody>
</table>
2.6 Online Help Facility

The Property Management System provides online Help at both the screen and element levels. Help information, which is accessed by pressing a PF key, is displayed in a pop-up window.

Screen Help gives brief instructions for using the screen and for invoking element Help.

To access screen Help, press PF1. To exit screen Help and return to the screen from which it was invoked press ENTER or PF3.

Figure 2-3 illustrates screen level Help text for the 03/04 Update Description/Custodian screen.

```
** SCREEN LEVEL HELP **

1. Type Item ID or Tag number, and press <ENTER> to display the record to be modified. NOTE: a property item that is frozen or retired CANNOT be modified.
2. Type over the information to be changed, and press <ENTER>.
3. All invalid information is highlighted, and a message explaining the first error is displayed.
4. Edit the invalid information, and press <ENTER>.

WARNING: You may update only those records which belong to your Department (or Center, if you have center level access).
To display information about a data element, position the cursor on the line following the data element, and press <PF2> (HELP).
```

Figure 2-3 Example of Screen Level Help

Element Help describes the data element and how it is used in Property Management and in other administrative systems. If applicable, it also gives a list of valid values for the data element.

To access element Help, TAB to the element (field) that you want to research and press PF2. If you cannot TAB to that field, use the arrow keys to position the cursor in that field, and press PF2. If you are using the arrow keys, the system will not take you to element Help unless you position the cursor at least two spaces following the colon of the data label for the field to be queried. To exit element Help and return to the screen from which it was invoked, press PF3.

Figure 2-4 illustrates element Help text for “Trans ID”.

```
*** UNIVERSITY DATA DICTIONARY ***

DATA ELEMENT NAME: TRANSACTION-REFERENCE-ID-NUMBER
NATURAL ALIASES: TRANS-REF-ITM

DEFINITION
A reference number that identifies the transaction used to purchase the property item. For transactions that originate from the accounting system, this number identifies the accounting transaction. For items created from external sources, the reference number may be used to identify the source document.

SYSTEM NOTES
PM: When a property item is created, the transaction reference number specified for the item will be replicated in the first funding transaction. Subsequent funding transactions posted to the property item have their own transaction reference numbers.

** PF8 TO SEE MORE
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
QUIT
BACK FL0
```

Figure 2-4 Example of Element Level Help
2.7 Using Search Functions from Data Entry Screens

Overview

This section provides instructions for using search functions directly from data entry screens. Search functions, which are described in detail in Chapter 7, can be invoked directly from any data entry screen on which PF6 (SRCH) is an active function key.

To invoke the search function, just press PF5/PF6, depending on which screen. When a menu listing available search options for the screen is displayed, select the elements to be searched. Then select an item from each list that is displayed, and press ENTER. When ENTER is pressed, the existing record is updated with the selected information and the screen on which the search originated is displayed.

The Property Management Search Functions can be used to retrieve values for six different data elements: organization, custodian, tagging contact, building, floor/room and property category. But every search cannot be invoked from every screen. A search for any data element can only be invoked from the screens on which that data element can be entered or updated.

When PF5/PF6 is pressed, the system displays a menu of the search functions that are available on that screen and allows the type or types of searches to be selected. If only one data element can be searched for from that screen, the appropriate search screen is displayed when PF5/PF6 is pressed.

When an Item Cannot Be Updated

If the user does not have authorization to update a property item, or if a property item cannot be updated for another reason (such as retirement of the item), PF5/PF6 is disabled when that item is displayed for maintenance.

On the search function screens, a new starting point can be specified for the list that is displayed. This is accomplished by the prompt at the top of the screen.

For example, the Employee Search Facility screen, illustrated in Figure 2-5, has two prompts above the list of employee names: (Display by name) “Starting from Name” and (Display by SSN) “Starting from SSN”.

To start the list of employees with a particular employee’s name or social security number, type the individual’s last and first name following “Starting from Name” or social security number following “Starting from SSN”. However, before information is typed into either of these fields, use the space bar to erase the information in the other field.

In addition, to redisplay the names beginning at the top of the list, either by name or social security number, type an asterisk (*) in the first position of the appropriate “Starting from” prompt. For specific instructions for each screen, see Chapter 7, “Search Functions”.

Figure 2-5 Screen with Employee Search Facility in Window
2.7 Using Search Functions from Data Entry Screens (continued)

Scrolling Conventions

To view the entire list of any data element, use PF8 and PF7 to scroll forward and backward through the list, as necessary.

If a list is started with a particular value, scrolling forward will be limited to beginning from that point to the end of the list. Pressing PF7 to go backward will not display any information preceding the “starting from” value.

Procedure

To invoke the online search facility when an appropriate data entry screen is displayed as in Figure 2-6:

1. Press PF6

   ![Figure 2-6 Update Screen with Search Capability]

   Result: The system displays the available search options for the screen as illustrated in Figure 2-6,

2. Type an S in front of the selection to be made. Press ENTER.

   RESULT: Figure 2-7 illustrates the result when the Floor and Room search is selected.

   ![Figure 2-7 Screen when Search Facility Invoked]
2.7 Using Search Functions from Data Entry Screens (continued)

3. When the search screen is displayed, scroll back and forth through the list as necessary.

4. If necessary, specify a new starting point for the list.

5. If the appropriate value cannot be located, or in order to cancel the search, press PF3.

6. Repeat steps 3, 4 and 5 for each screen requested.

   RESULT: When the appropriate value is selected from every screen, the system returns to the data screen where PF6 was entered, and updates the displayed record with the information that was selected.

7. Continue with the data entry procedure from the screen in which the search was started.
Chapter 3 Entry and Exit Procedures

3.1 In This Chapter

This chapter provides instructions for entering and exiting the Property Management System.

This chapter is subdivided as follows:

- “In Preparation” provides instructions for getting authorized to use the Property Management System.
- “Entry Procedure” provides instructions for entering the Property Management System.
- “Exit Procedure” provides instructions for exiting the Property Management System.
3.2 In Preparation

Overview

Before the procedures can be followed in this chapter, the user must have authorization to use the Property Management System and have PROPERTY on the UMIS menu in the CICS region.

To obtain access to the Property Management System and individual must be identified by their Senior Business Officer as the individual as the person responsible for handling property for your area. If this is the case, the requirements to receive Property Management access are as follows:

- Complete Property Management Knowledge Building (on-line slides and quiz) and Property Management System Training (hands-on). Both can be found at the following address:
  [http://knowledgelink.upenn.edu/](http://knowledgelink.upenn.edu/)
- Complete ‘Request for Administrative Mainframe Logon ID...’ Form found at the following address:
  [http://www.finance.upenn.edu/comptroller/forms/index.shtml#PropMan](http://www.finance.upenn.edu/comptroller/forms/index.shtml#PropMan)
  - Be sure to identify ORG(s) OR CNAC
  - Requires both Access Administrator and Trainer Signature

3.3 Entry Procedure

To enter the Property Management System when a message stating “Administrative computing facility – please logon” is displayed on the terminal screen.

- Type **cicsaupn**; press **ENTER**
  RESULT: The system displays the CICS logo.
- Press **Pause/ Break**
  RESULT: The system clears the screen
- Type **cssn**, a space, and logon ID, for example, type **cssn p123456**; press **ENTER**
  RESULT: The system prompts for the user's password.
- Type the logon password; press **ENTER**
  RESULT: the system displays various information about the session, including “signon completed”.
- Press **Pause/ Break**
- Type **umis**; press **ENTER**
  RESULT: the system displays the user's UMIS menu for CICS
- Type **property**; press **ENTER**
  RESULT: the system displays the Property Management Main Menu (Figure 3-1). It lists the nine system functions.
3.3 Entry Procedure (continued)

Figure 3-1 Property Management Main Menu

- Type the number of the system function that you wish access and press ENTER.
  
  RESULT: The system displays the appropriate sub-system menu.

- Go to the chapter of this manual that covers the procedure the user wants to perform.

3.4 Exit Procedure

To exit the Property Management System from any system access:

- Press PF12
  
  RESULT: The user exits the system and returns to the UMIS menu.

- Press PF12 again
  
  RESULT: The administrative mainframe is exited.
## Chapter 4 Quick Reference Guide

### 4.1 Functions

<table>
<thead>
<tr>
<th>To Perform This Function</th>
<th>Use This Screen</th>
<th>Follow This Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change Custodian</td>
<td>03/04</td>
<td>Update Description/Custodian</td>
</tr>
<tr>
<td>Change Tagging Contact</td>
<td>03/04</td>
<td>Update Description/Custodian</td>
</tr>
<tr>
<td>Change Tagging Contact Phone Number</td>
<td>03/04</td>
<td>Update Description/Custodian</td>
</tr>
<tr>
<td>Change Asset Information</td>
<td>03/04</td>
<td>Update Description/Custodian</td>
</tr>
<tr>
<td>- Description</td>
<td></td>
<td>Tip: It is recommended that the original description not be overwritten when making any edits/additions to the description.</td>
</tr>
<tr>
<td>- Manufacturer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Model number</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Serial number</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change Location</td>
<td>03/05</td>
<td>Update Location/Tagging/Inventory</td>
</tr>
<tr>
<td>- Within same bldg</td>
<td>N/A</td>
<td>Complete Equipment Change Form</td>
</tr>
<tr>
<td>- To a different bldg</td>
<td>N/A</td>
<td>Complete Home Use Form</td>
</tr>
<tr>
<td>- From on campus to off campus i.e. home use</td>
<td>N/A</td>
<td>Complete Home Use Form (bottom section of the same form used when reporting ‘on campus to off campus’ use)</td>
</tr>
<tr>
<td>- From off to on campus</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dispose of a Property Item</td>
<td>N/A</td>
<td>Complete Notification of Equipment Disposition Form</td>
</tr>
<tr>
<td>Find Category Codes</td>
<td>02/06</td>
<td>Display Categories</td>
</tr>
<tr>
<td>Find Organization Codes</td>
<td>02/02</td>
<td>Display Organizations</td>
</tr>
<tr>
<td>Find Employee by Name</td>
<td>02/01</td>
<td>Display Employee Names</td>
</tr>
<tr>
<td>Find Location Codes</td>
<td>02/03</td>
<td>Display Buildings by Name</td>
</tr>
<tr>
<td>Find All Property Items for a Specific PO</td>
<td>02/05</td>
<td>List Items by PO Number</td>
</tr>
<tr>
<td>Request Reports</td>
<td>04/01</td>
<td>Property Item Listing</td>
</tr>
<tr>
<td></td>
<td>04/02</td>
<td>ORG Code/Name/Administrator Cross-Ref</td>
</tr>
<tr>
<td></td>
<td>04/03</td>
<td>Property Custodians by Organization</td>
</tr>
<tr>
<td></td>
<td>04/04</td>
<td>Building Code/Name Cross-Ref List</td>
</tr>
<tr>
<td></td>
<td>04/05</td>
<td>Category Code Listing</td>
</tr>
</tbody>
</table>
Chapter 5 Item Inquiry

5.1 In This Chapter

This chapter provides instructions for displaying descriptive information about a property item and about the organization and individual responsible for the item.

This chapter is subdivided as follows:

- “Display Description/Responsibility” provides instructions for displaying descriptive information about a property item and about the organization and individual responsible for the item.

- “Display Funding Adjustments” provides instructions for displaying funding transactions and acquisition information about a property item.

- “Display Inventory/Depreciation” provides instructions for displaying inventory and depreciation information about a property item.
5.2 Display Description/Responsibility

Overview

The Display Description/Responsibility function enables authorized operators to display descriptive information about a property item and the organization and the individual responsible for the item.

Procedure

To display descriptive information about a property item and the responsible organization and individual when the Item Inquiry/General Maintenance Menu is displayed:

1. Select function/option 03/01, Display Description/Responsibility. Then, type either the item ID or the tag number of the property item.

2. Press ENTER

RESULT: The system displays the specified record on the Display Description/Responsibility screen, as illustrated in Figure 5-1.

3. Note the relevant information.
Display Description/ Responsibility  5 – 2 (continued)

From this point, the user can perform one of the following:

- To access element Help on any field (data element) on this screen, TAB to the field to be queried and press PF2. If it is not possible to TAB to that particular field, the arrow keys can be used to position the cursor to that field, and press PF2. When using the arrow keys, the system will not access element Help unless the cursor is positioned two spaces following the colon of the data label for the field being queried. In order to exit element Help and return to the screen, press PF3.

- To view additional information (funding adjustment) about this property item, press PF4.

- To view inventory/depreciation information about this property item, BACKTAB to the Function/Option field at the top of the screen, type 0303, and press enter or press HOME, type 0303 and press ENTER.

- To view information about another property item, type over the information on the screen with either the item ID or the tag number of that item, and press ENTER.

- To return to the Item Inquiry/General Maintenance Menu, BACKTAB to the Function/Option field at the top of the screen, type 0300, and press ENTER or press HOME, type 0300 and press ENTER.

- To return to the Property Management Main Menu, BACKTAB to the Function/Option field at the top of the screen, type 0000 (four zeros) and press ENTER or press HOME, type 0000 and press ENTER.

- To exit the system, press PF12.
5.3 Display Funding Adjustments

Overview

The Display Funding Adjustments function enables authorized operators to display funding transactions and acquisition information about a property item. The funding transactions are displayed by transaction date with the oldest transactions listed first.

Scrolling Conventions

If the funding transaction to be viewed is not displayed on the screen, scrolling forward and backward through the information can be accomplished by pressing PF8 and PF7.

Procedure

To display funding transactions and acquisition information about a property item when the Item Inquiry/General Maintenance Menu is displayed:

1. Select function/option 03/02, Display Funding Adjustments, then type either the item ID or the tag number of the property item and press ENTER.

   RESULT: The system displays the specified record on the Display Funding Adjustments screen, as illustrated in Figure 5-2.

   ![Figure 5-2 Display Funding Adjustments Screen](image)

   **Figure 5-2 Display Funding Adjustments Screen**

   CPROGRAM: PM03832P
   PROPERTY MANAGEMENT SYSTEM
   DISPLAY FUNDING ADJUSTMENTS
   DATE: 11/16/05
   FUNCTION/OPTION: 03 / 02
   TIME: 15:09:48
   ITEM ID#: 190 055 811
   TAG#: B 00024789
   CHANGE ITEM ID# OR TAG# ABOVE AND PRESS 'ENTER' TO VIEW ANOTHER ITEM.
   TRANS ID#: 558347 CREATE DATE: 12/10/01 ACQUISITION DATE: 11/30/01
   PON#: 901952 ITEM SOURCE: ACCTG RECORDED DATE: 12/18/01
   DISPOSITION: ACTIVE METHOD: NOT RETIRED METHOD DATE:
   ORG: 4513 - EM-INSTITUTE FOR ENVIRONMENTAL ACQUISITION COST: 11,411.30

   DATE TYP S CYCLE TRNSID ACCOUNT # U/F SPNS DEPT AMOUNT
   -------- --- - ------ ------ ---------- ---------- ----------
   12/18/01 CFP A NOV01 558347 5 10198 260 F PRIV 11211 12,954.53
   02/21/02 PCR A JAN02 558347 5 10198 260 F PRIV 11211 1,543.23 CR

   **END OF DATA

   Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
   HELP EHELP PREV NEXT BACK FWD EXIT

2. Note the relevant information.

3. Scroll back and forth through the funding information as necessary.
5.3 Display Funding Adjustments (continued)

At this point, the user may do one of the following:

- To access element Help on any field (data element) on this screen, TAB to the field to be queried and press PF2. If it is not possible to TAB to that field, use the arrow keys to position the cursor to that field and press PF2. When using the arrow keys, the system will not access element Help unless the cursor is positioned at least two spaces following the colon of the data label for the field to be queried. To exit element Help and return to the screen, press PF3.

- To view additional (inventory/depreciation) information about this property, press PF4.

- To view description/responsibility information about a property item, BACKTAB to the Function/Option field at the top of the screen and type 0301 and press ENTER. As an alternative, press the HOME key, type 0301 and press ENTER.

- To return to the Item Inquiry/General Maintenance Menu, BACKTAB to the Function/Option field at the top of the screen, type 0300 and press ENTER, or press the HOME key, type 0300 and press ENTER.

- To return to the Property Management Main Menu, BACKTAB to the Function/Option field at the top of the screen, type 0000 (four zeros) and press ENTER or press HOME, type 0000 and press ENTER.

- To exit the system, press PF12.
5.4 Display Inventory/Depreciation

Overview

The Display Inventory/Depreciation function enables authorized operators to display inventory and depreciation information about a property item.

Procedure

To display inventory and depreciation information about a property item when the Item Inquiry/General Maintenance Menu is displayed:

1. Select function/option 03/03, Display Inventory/Depreciation, then type either the item ID or the tag number of the property item and press ENTER.

RESULT: The system displays the specified record on the Display Inventory/Depreciation screen as illustrated in Figure 5-3.

2. Note the relevant information.

Figure 5-3 Display Inventory/Depreciation Screen
5.4 Display Inventory/Depreciation (continued)

At this point, the user may do one of the following:

- To access element Help on any field (data element) on this screen, TAB to the field to be queried and press PF2. If TABbing to that field is not permitted, the arrow keys can be used to position the cursor to the field and press PF2. When using the arrow keys, the cursor must be positioned at least two spaces following the colon of the data label for the field to be queried. To exit element Help and return to the screen, press PF3.

- To view funding adjustment information about this property item, BACKTAB to the Function/Option field at the top of the screen, type 0302 and press ENTER or press HOME type 0302 and press ENTER.

- To view description/responsibility information about this property item, BACKTAB to the Function/Option field at the top of the screen, type 0301 and press ENTER or press HOME, type 0301 and press ENTER.

- To view information about another property item, type over the information on the screen with either the item ID or the tag number of that item and press ENTER.

- To return to the Item Inquiry/General Maintenance Menu, BACKTAB to the Function/Option field at the top of the screen, type 0300 and press enter or press HOME, type 0300 and press ENTER.

- To return to the Property Management Main Menu, BACKTAB to the Function/Option field at the top of the screen, type 0000 (four zeros) and press ENTER or press HOME, type 0000, and press ENTER.

- To exit the system, press PF12.
Chapter 6 Maintaining Property Items

6.1 In This Chapter

This chapter provides instructions for maintaining property items online in the Property Management System. With the exception of the tables of “updatable fields”, each section corresponds to an option from the Item Inquiry/General Maintenance Menu.

This chapter is subdivided as follows:

- “Update Description/Custodian” provides instructions for updating descriptive information about property items and for changing Custodians and/or Tagging contact and Tagging Contact phone numbers of the items.

- “Updatable Fields – Screen 03/04” lists and describes the updatable fields on the Update Description/Custodian screen.

- “Update Location/Tagging/Inventory” provides instructions for updating location, tagging and inventory information about a property item.

- “Updatable Fields – Screen 03/05” lists and describes the updatable on the Update Location/Tagging/Inventory screen.

- “Common Functions Performed Using Screen 03/05” lists and describes the common functions of the Update Location/Tagging/Inventory screen, showing which field(s) need to be updated to perform a particular function.

- “Add Update Comments” provides instructions for adding, changing and deleting comments in property item records.
6.2 Update Description/Custodian

Overview

The Update Description/Custodian function enables authorized operators to update the following fields. Please note: Only items that are not frozen and not retired may be updated.

- Manufacturer
- Model Number
- Serial Number
- Description
- Custodian Name
- Tagging Contact Name
- Tagging Contact Phone Number

Frozen and Retired Items

Frozen property items are those items that are in the process of being either tagged or inventoried by the PMG. Retired property items are those that have been disposed of and are no longer part of the property inventory.

When such an item is displayed through this menu option (Update: Description/Custodian), the system will not allow you to update the record.

To Cancel Your Updates

If, for any reason, an update needs to be cancelled, do not press ENTER after new information has been typed. Instead, press PF11 to refresh the screen with the information originally displayed by the system.

Procedure

To update the description and/or custodian of a property item when the Item Inquiry/General Maintenance Menu is displayed:

1. Select function/option 03/04, Update Description/Custodian. Type the item ID or the tag number of the property item and press ENTER.
6.2 Update Description/ Custodian (continued)

2. For most fields simply TAB to the information to be updated and type over it with the new information, for example, the MFR, MODEL, S/N# and Tagging Contact Phone Number.
   a. For the Tagging Contact and the Custodian name, press F5 or F6 respectively to perform a search. You can press these keys from anywhere on the screen, i.e. it is not necessary to place the cursor next to the field.
   b. In order to determine which fields are updatable on the screen, see section 6.3 on updatable fields.

3. After all relevant information has been keyed, press ENTER.
   RESULT: The system validates the information that was typed. If invalid information is displayed on the screen, the system highlights it and displays a message stating the error in the first highlighted item. If no invalid information is displayed, the system displays a message stating “Record has been successfully updated”.

4. If invalid information is highlighted, edit the information and press ENTER.

5. If invalid information is not highlighted move on to the next step and do one of the following:
   a. To update information about another property item, type over the information on the screen with either the item ID or the tag number of that item, press ENTER to display the new record then repeat the procedure beginning with step 2.
   b. To return to the Item Inquiry/General Maintenance Menu, BACKTAB to the Function/Option field at the top of the screen, type 0300, and press ENTER, or press HOME, type 0300 and press ENTER.
   c. To return to the Property Management Main Menu, BACKTAB to the Function/Option field at the top of the screen, type 0000 (four zeros) and press ENTER or press HOME, type 0000 and press ENTER.
# 6.3 Updatable Fields - Screen 03/04

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Item ID#</strong></td>
<td>Unique identifying number of an item record. System generated at the time of record create.</td>
<td>In this location on the screen, only &quot;Item ID#&quot; is required to retrieve the record of another property item. <strong>This field cannot be updated by the Property Administrator.</strong></td>
</tr>
<tr>
<td><strong>Tag#</strong></td>
<td>Unique number of the barcode tag placed on the property item for identification and inventory purposes.</td>
<td>In this location on the screen, only &quot;Tag#&quot; is required to retrieve the record of another property item. <strong>This field cannot be updated by the Property Administrator.</strong></td>
</tr>
<tr>
<td><strong>Item Source</strong></td>
<td>A code specifying the origin of a property item.</td>
<td>The ‘List of Values’ for this field are: ACCTG - Accounting System AUDTD - SEMS, Reviewed By PMG CAPPJ - Capital Project Acquisitions CPUP - Clinical Practices EPLP - Extended Purch Loan PMG GIFF - Gift GNLED - General Ledger OTHER - PMG Corrections, Etc. PFCVT - Plant Fund Converted Items SEMS - Converted From SEMS <strong>This field cannot be updated by the Property Administrator.</strong></td>
</tr>
<tr>
<td><strong>PO#</strong></td>
<td>This number identifies the purchase order that was used to purchase the property item.</td>
<td>It may or may not be present. More than one property item can have the same purchase order number. <strong>This field cannot be updated by the Property Administrator.</strong></td>
</tr>
<tr>
<td><strong>Trans ID#</strong></td>
<td>A reference number that identifies the transaction used to purchase the property item. For transactions that originate from the accounting system, this number identifies the accounting transaction. For items created from external sources, the reference number may be used to identify the source document.</td>
<td>When a property item is created, the transaction reference number specified for the item will be replicated in the first funding transaction. Subsequent funding transactions posted to the property item have their own transaction reference numbers. <strong>This field cannot be updated by the Property Administrator.</strong></td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td>Comments</td>
</tr>
<tr>
<td>---------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Vendor</td>
<td>The Supplier from whom the property item was purchased.</td>
<td>When record created, entered by the PMG from the header region of the purchase order.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>This field cannot be updated by the Property Administrator.</strong></td>
</tr>
<tr>
<td>Mfr</td>
<td>The manufacturer of the property item.</td>
<td>When record created, if number available, entered by PMG from either the purchase order or invoice.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>This field can be updated by the Property Administrator.</strong></td>
</tr>
<tr>
<td>Model</td>
<td>The model number or name of the property item.</td>
<td>When record created, if number available, entered by PMG from either the purchase order or invoice.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>This field can be updated by the Property Administrator.</strong></td>
</tr>
<tr>
<td>S/N#</td>
<td>Manufacturer supplied serial number of the property item.</td>
<td>When record created, if number available, entered by PMG from the invoice. If serial number is only provided when the asset arrives,</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>this field should be updated by the Property Administrator.</strong></td>
</tr>
<tr>
<td>Description</td>
<td>Description of the property item. First line required; second line optional.</td>
<td>When record created, entered by the PMG from the line region of the purchase order.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>This field can be updated by the Property Administrator.</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tip:</strong> It is recommended that the original description not be overwritten when making any edits/additions to the description.</td>
</tr>
<tr>
<td>Category</td>
<td>A code identifying the general asset category or group to which this property item belongs.</td>
<td>The category is selected by the Buyer when the requisition is created. When record created, entered by the PMG from the purchase order.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>For a full listing of categories click on: <a href="#">Category Codes</a>.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>This field cannot be updated by the Property Administrator.</strong></td>
</tr>
<tr>
<td>Class</td>
<td>A code specifying whether the property item is a fixed or moveable piece of equipment or a building.</td>
<td>When a property item is created online, the system obtains a default Class Code for the property item based on the property item’s Category. This default Class Code is modifiable online by the PMG.</td>
</tr>
<tr>
<td>Custodian Name</td>
<td>Name of the individual who is responsible for the property item. This is frequently, but not necessarily, the person who is using the item.</td>
<td><strong>This field cannot be updated by the Property Administrator.</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Format ‘Last, First Middle’.</strong> If no Custodian ID is entered, the system will attempt to find an exact match on PAYROLL based on the Name. If one and only one match is found, the system will automatically retrieve the Custodian Social Security Number based on the name. Warnings: Refer to warnings defined for Custodian ID - failure to enter a name that is found in the Payroll system may result in invalid custodian data for the property item; custodians should be employees of the university. <strong>This field can be updated by the Property Administrator.</strong></td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td>Comments</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Tagging Contact Name</td>
<td>Name of the person whom the PMG should contact to send the property tags or to resolve any questions during the tagging process.</td>
<td>Format 'Last, First Middle'. This field can be updated by the Property Administrator.</td>
</tr>
<tr>
<td>Tagging Contact Phone Number</td>
<td>Phone number of the individual who serves as the tagging contact for this property item.</td>
<td>A five-digit University extension is acceptable. This field can be updated by the Property Administrator.</td>
</tr>
<tr>
<td>ORG</td>
<td>The organization that is responsible for the property item (also referred to as the “owning” organization).</td>
<td>Owning Organization and its associated owning responsibility center are used to regulate update access by non-PMG users to all information about a specific property item. A property item may be updated only if the user’s organization affiliation matches the property item’s owning organization or if the user’s center affiliation matches the property item's owning center depending upon whether the user has organization-level or center-level security, respectively. This field cannot be updated by the Property Administrator.</td>
</tr>
<tr>
<td>Univ Title</td>
<td>Whether or not the University holds title to the property item.</td>
<td>When record created, entered by the PMG from the purchase order. The ‘List of Values’ for this field are: Y - Yes N - No This field cannot be updated by the Property Administrator.</td>
</tr>
<tr>
<td>CNTR</td>
<td>The responsibility center associated with the organization that is responsible for the property item (“owning” organization).</td>
<td>If a property item's owning organization is changed online, the system will proliferate this change across all files for the same property item. If the new organization results in a change to the responsibility center as well, the center will change, likewise, across all files for the same property item. This field cannot be updated by the Property Administrator.</td>
</tr>
<tr>
<td>ORG CNTL</td>
<td>A number that is entered on the purchase requisition by the requesting organization to track the purchase order through the accounting system. No longer used.</td>
<td>This field is no longer used by the University. This field cannot be updated by the Property Administrator.</td>
</tr>
</tbody>
</table>
6.4 Update Location/Tagging/Inventory

Overview

The Update Location/Tagging/Inventory function enables authorized operators to update location and/or inventory information about a property item that is not frozen or retired.

Frozen and Retired Items

Frozen and retired items are those that are in the process of being either inventoried or retired by the PMG. Retired property items are those that have been disposed of and are no longer part of the property inventory. When such an item is displayed through this menu option (Update Location/Tagging/Inventory) the system will not permit the record to be updated.

To Cancel Your Updates

If, for any reason, an update needs to be cancelled, do not press ENTER after new information has been typed. Instead, press PF11 to refresh the screen with the information originally displayed by the system.

Procedure

To update location and/or inventory information about a property item when the Item Inquiry/General Maintenance Menu is displayed.

1. Select function/option 03/05, Update Location/Tagging/Inventory. Type either the item ID or the tag number of the property and press ENTER.

RESULT: The system displays existing information about the item on the Update Location/Tagging/Inventory screen (Figure 6-2).

```
PROGRAM: PM9305P
PROPERTY MANAGEMENT SYSTEM
DATE: 11/17/05
UPDATE LOCATION/TAGGING/INVENTORY
TIME: 09:22:04
FUNCTION/OPTION: 03 / 05
THS#: 89024789

ITEM ID#: 100 855 811
TAG#: 89024789

LOCATION ----- TYPE ITEM INFORMATION BELOW; PRESS 'ENTER' WHEN COMPLETE.
OWNERSHIP ----- BUILDING: 0076 - Chemistry Laboratories- 1973 U
FLR & RM: 1 - 124_ ORG: 4613
CENTER: 40

TAGGING ----- TAG# STATUS: TAG - TAGGED DATE: 06/20/82
RESPSB: PMG - PROP MGMT GROUP FROZEN: N

INVENTORY ----- DATE: 06/28/82 MARK FOR RETIREMENT: N
CONDITION: G - GOOD REASON: _ -
IN USE: Y DATE:_
SURPLUS: N SURPLUS DATE: _

DISPOSITION: A - ACTIVE METHOD: - NOT RETIRED DATE:
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
HELP EHELP PREV Srch CNCL EXIT

Figure 6-2 Update Location/Tagging/Inventory Screen
```
6.4 Update Location/Tagging/Inventory (continued)

2. TAB to the information that is to be updated and type over it with the new information. If the user is unsure as to which fields are eligible for updating, see section 6.5 Updatable Fields - Screen 03/05.

3. After all relevant information has been typed, press ENTER.

RESULT: The system validates the information that has been typed. If invalid information is displayed on the screen, the system highlights it and displays a message stating the error in the first highlighted item. If no invalid information is displayed, the system displays a message stating “Record has been successfully updated”.

4. Is invalid information highlighted? If yes, TAB to the invalid information, edit it, and press ENTER.

5. If no invalid information is highlighted, do the following:

   a. To update information about another property item, type over the information on the screen with either the item ID or the tag number of that item, press ENTER to display the new record then repeat this procedure beginning with step 2.

   b. To return to the Item Inquiry/General Maintenance Menu, BACKTAB to the Function/Option field at the top of the screen, type 0300, and press ENTER, or press HOME, type 0300 and press ENTER.

   c. To return to the Property Management Main Menu, BACKTAB to the Function/Option field at the top of the screen, type 0000 (four zeros) and press ENTER, or press HOME, type 0000 and press ENTER.

   d. To exit the system, press PF12.
### 6.5 Updatable Fields - Screen 03/05

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item ID #</td>
<td>Unique identifying number of an item record. System generated at the time of record creation.</td>
<td>All funding adjustments and comment records for this property item are created with the same identifier. The last Item ID generated is stored on the System Control file to ensure that all Item ID’s are unique. <strong>This field cannot be updated by the Property Administrator.</strong></td>
</tr>
<tr>
<td>(Tagging) Tag#</td>
<td>Unique number of the bar coded tag placed on the property item for identification and inventory purposes.</td>
<td>When this field is updated, “(Tagging) status,” “Tag status date,” and “(Inventory) date” are also changed appropriately. Tag numbers may be blank. <strong>This field cannot be updated by the Property Administrator.</strong></td>
</tr>
<tr>
<td>Location-----Building</td>
<td>A code identifying where the property item resides.</td>
<td>Location codes correspond to the codes used in FIMS. For on campus locations, the location code includes the building, floor, and room number. For off campus locations, only the building is required. <strong>This field cannot be updated by the Property Administrator.</strong></td>
</tr>
<tr>
<td>Location-----Flr &amp; Rm</td>
<td>The Floor and Room number where the property item resides</td>
<td><strong>This field can be updated by the Property Administrator.</strong></td>
</tr>
</tbody>
</table>
### 6.5 Updatable Fields - Screen 03/05 (continued)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ownership-----</td>
<td>The organization that is responsible for the property item (also referred to as the &quot;owning&quot; organization).</td>
<td>In most cases, this is the organization that is using the property item and not necessarily the organization that purchased the item. <strong>This field cannot be updated by the Property Administrator.</strong></td>
</tr>
<tr>
<td>ORG</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ownership-----</td>
<td>The responsibility center associated with the organization that is responsible for the property item (&quot;owning&quot; organization).</td>
<td>In most cases, the owning organization is the organization that is using the property item and not necessarily the organization that purchased the item. <strong>This field cannot be updated by the Property Administrator.</strong></td>
</tr>
<tr>
<td>Center</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tagging--------</td>
<td>A code specifying the organizational entity (PMG or department) responsible for tagging the property item.</td>
<td>The ‘List of Values’ for this field are: DPT – Department PMG – Property Management Group <strong>This field cannot be updated by the Property Administrator.</strong></td>
</tr>
<tr>
<td>Respsb</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tagging--------</td>
<td>A code that indicates whether or not a property item has been or can be tagged regardless of the organizational entity (PMG or Department) responsible for tagging.</td>
<td>The ‘List of Values’ for this field are: Blank – Not Ready RDY - Ready for Tagging TGD - Tagged UPC - Untaggable-Physical URL - Untaggable-Remote UTP - Untaggable-Temporarily <strong>This field cannot be updated by the Property Administrator.</strong></td>
</tr>
<tr>
<td>Status</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tagging--------</td>
<td>See Tag # Above</td>
<td><strong>This field cannot be updated by the Property Administrator.</strong></td>
</tr>
<tr>
<td>Tag #</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tagging--------</td>
<td>Date that the last tagging status change took place.</td>
<td>This date is system generated when the Tagging Status field is updated. <strong>This field cannot be updated by the Property Administrator.</strong></td>
</tr>
<tr>
<td>Tag Status Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Frozen</td>
<td>Flag that indicates whether or not a property item is &quot;frozen&quot; (i.e. cannot be updated) because it is being scanned for tagging or inventory.</td>
<td>Funding adjustment records will also be &quot;frozen&quot; from maintenance since they all relate to a particular property item. This flag is modified only by the scanning process. <strong>This field cannot be updated by the Property Administrator.</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td>Comments</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Inventory Date</td>
<td>The date that this property item was last inventoried.</td>
<td>The last inventory date is populated by the batch process that updates the item from the inventory scanning process. It is also updated online whenever a property item is marked as &quot;tagged&quot; or &quot;untaggable&quot;. Last inventory date will be blank if the property item is neither tagged nor marked as &quot;untaggable&quot;. This field cannot be updated by the Property Administrator.</td>
</tr>
<tr>
<td>Inventory Condition</td>
<td>A code used to describe the current physical condition of the property item.</td>
<td>The 'List of Values' for this field are: D - Damaged G - Good P - Poor This field can be updated by the Property Administrator.</td>
</tr>
<tr>
<td>Inventory In Use</td>
<td>A flag specifying whether or not the property item is currently in use.</td>
<td>For retired items, this flag specifies whether the item was ever in use during the current year (if so, the item is eligible for depreciation). If the item is a surplus item (Surplus Use Flag = 'Y') or if the item is incomplete (Disposition Status = 'I'), the In Use Flag must be 'N' (no). The 'List of Values' for this field are: Y - Yes N - No This field can be updated by the Property Administrator.</td>
</tr>
<tr>
<td>Inventory Surplus</td>
<td>Whether or not a property item has been marked for surplus.</td>
<td>An item that is &quot;in use&quot; cannot be marked for surplus. The 'List of Values' for this field are: Y - Yes N - No This field can be updated by the Property Administrator.</td>
</tr>
<tr>
<td>Inventory Mark for Retirement</td>
<td>Used by non-PMG users to mark a property item as a candidate for retirement.</td>
<td>This flag tells PMG which property items should be disposed of (&quot;retired&quot;). Please note: The PMG will not dispose of an item however until they received a completed Notification of Disposition of Equipment form. This field can be updated by the Property Administrator.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td>Comments</td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Inventory- -Reason</td>
<td>A code specifying the reason a property item was marked by non-PMG users as a candidate for retirement.</td>
<td>The 'List of Values’ for this field are:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Blank - Not Retired</td>
</tr>
<tr>
<td></td>
<td></td>
<td>C - Cancelled Po</td>
</tr>
<tr>
<td></td>
<td></td>
<td>D - Donation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>E - Exchng/Trade-In</td>
</tr>
<tr>
<td></td>
<td></td>
<td>J - Junk</td>
</tr>
<tr>
<td></td>
<td></td>
<td>L - Lost</td>
</tr>
<tr>
<td></td>
<td></td>
<td>M - Mistake</td>
</tr>
<tr>
<td></td>
<td></td>
<td>O - Trfout</td>
</tr>
<tr>
<td></td>
<td></td>
<td>R - Returned</td>
</tr>
<tr>
<td></td>
<td></td>
<td>S - Sale</td>
</tr>
<tr>
<td></td>
<td></td>
<td>This field can be updated by the Property Administrator.</td>
</tr>
<tr>
<td>Inventory- -Date</td>
<td>The date that this property item was marked by a non-PMG user as a candidate for retirement.</td>
<td>The date is system generated when the ‘Mark for Retirement’ field is updated.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>This field can be updated by the Property Administrator.</td>
</tr>
<tr>
<td>Disposition</td>
<td>A code used to identify the status of a property item relative to the University's property inventory. Only &quot;active&quot; property items are tracked as part of the inventory.</td>
<td>&quot;Incomplete&quot; items are not considered part of the inventory until they are fully paid for (become &quot;active&quot;). &quot;Retired&quot; property items have been disposed of and are no longer part of the inventory. The 'List of Values’ for this field are:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>A - Active</td>
</tr>
<tr>
<td></td>
<td></td>
<td>I - Inactive</td>
</tr>
<tr>
<td></td>
<td></td>
<td>R - Retired</td>
</tr>
<tr>
<td></td>
<td></td>
<td>This field cannot be updated by the Property Administrator.</td>
</tr>
<tr>
<td>Method</td>
<td>Method by which a property item was disposed; i.e., the reason a property item was retired.</td>
<td>Will have a value only for retired property items. Entry of Disposition Method causes the system to change Disposition Status to &quot;retired&quot;. The 'List of Values’ for this field are the same as the ‘Reason’ field above.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>This field cannot be updated by the Property Administrator.</td>
</tr>
<tr>
<td>Date</td>
<td>The date the ‘Disposition’ field is updated.</td>
<td>The date is system generated when the ‘Disposition’ field is updated.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>This field cannot be updated by the Property Administrator.</td>
</tr>
</tbody>
</table>
6.6 Add/ Update Comments

Overview

This function enables authorized operators to add, update and delete comments about a property item. Only one comment can be added at a time. However, two comments that are displayed on the same screen can be changed or deleted with a single operation.

Comments are displayed in alphabetical order by the Comment Type code. Comment type codes include the following:

- FCONT – Federal Contract information
- FIELD – General comments from users
- PMG – Property Management Group comments

For a complete list use PF2.

For each property item, there can be only one comment per Comment type. Each comment is limited to five lines of text.

Tag Number

Tag number cannot be used to retrieve an item record on this screen. If the tag number is known but not the item ID, retrieve the property item record on another screen, change the Function/Option to 0306 and press ENTER. This will transfer the user back to this screen where comments can be added.

Scrolling Conventions

If a comment to be updated or deleted is not displayed on the screen, use PF7 and PF8 to scroll forward and backward through the comments as necessary.

In This Section

The remainder of this section gives instructions for performing three procedures – adding, changing and deleting comments.
6.7 Adding Comments

Overview

The maximum number of different comments that can be added about a property item is controlled by the number of Comment Type codes defined in the system. As previously stated, there can be only one comment for each Comment Code type.

Scrolling Conventions

If the comment to be updated is not displayed on the screen, use PF8 and PF7 to scroll forward and backward through the funding records, as necessary.

Procedure

To add comments about a property item when the Item Inquiry/General Maintenance Menu is displayed:

1. Select function/option 03/06, Add/Update Comments, then type the item ID of the property item, press ENTER.

   RESULT: The system displays the first page of comments about the item on the Add/Update Comments screen (Figure 6-3).

2. If no comments exist for the item, the system displays a message stating “No comment records exist for this item ID”.

![Figure 6-3 Add/Update Comments](image-url)
6.7 Adding Comments (continued)

3. Type the code for the comment type that is to be added, use PF2 for a list of valid comment type codes; press ENTER.

RESULT: The system validates the information that has been typed. If the code is invalid or if that comment type already exists for the property item, the system displays a message stating the error. If the code is valid and that comment type does not already exist for the property item, the system displays the code that you have just typed and blank lines for the comment type.

4. Type the comment text to be added and press ENTER.

RESULT: The system displays a message stating “Comment record has been added”.

5. Perform one of the following:
   a. To add, update or delete another comment for this property item, perform the appropriate procedure beginning with step 3 above.
   b. To view all comments for this property item, press PF7.
   c. To add comments about another property item, type over the information on the screen with the item ID of that item, press ENTER to display the new record then repeat this procedure beginning with step 3 above.
   d. To return to the Item Inquiry/General Maintenance Menu, BACKTAB to the Function/Option field at the top of the screen, type 0300 and press ENTER, or press HOME, type 0300 and press ENTER.
   e. To return to the Property Management Main Menu, BACKTAB to the Function/Option field at the top of the screen, type 0000 (four zeros) and press ENTER, or press HOME, type 0000 and press ENTER.
   f. To exit the system, press PF12.
6.8 Changing Comments

Overview

This function allows the user to change all existing comments recorded for a property item. If two comments are displayed on the screen, both can be changed before pressing ENTER to update.

Procedure

To change comments about a property item when the Item Inquiry/General Maintenance Menu is displayed:

1. Select function/option 03/06, Add/Update Comments and then type the item ID of the property item. Press ENTER.

   RESULT: The system displays existing comments about the item on the Add/Update Comments screen. If the property item has no comments, the system displays a message stating “No comment records exist for this item ID”.

2. If the comment to be updated is not displayed on the screen, scroll back and forth through the list as necessary.

3. TAB to the comment to be updated.

4. Perform one of the following functions:
   a. To change existing text, type over it with the new text and press ENTER.
   b. To delete existing text, use the space bar to erase the text and press ENTER.
   c. To add new text to an existing comment, type that text in the unused portion of the comment area and press ENTER.

       RESULT: The system displays a message stating “Comment records have been updated”.

5. Perform one of the following functions:
   a. To add, change or delete another comment for this property item, perform the appropriate procedures beginning with step 3 above.
   b. To view all comments for a property item, press PF7.
   c. To update comments about another property item, type over the item ID on the screen with the item ID of the item on the screen with the item ID of the item whose comments are to be updated, press ENTER to display the new record and then repeat this procedure beginning with step 3 above.
   d. To return to the Item Inquiry/General Maintenance Menu, BACKTAB to the Function/Option field at the top of the screen, type 0300 and press ENTER or press HOME, type 0300 and press ENTER.
   e. To return to the Property Management Main Menu, BACKTAB to the Function/Option field at the top of the screen, type 0000 (four zeros) and press ENTER or press HOME, type 0000 and press ENTER.
   f. To exit the system, press PF12.
6.9 Deleting Comments

Overview

This function allows comments to be deleted for a property item. If two comments are displayed on the screen, both can be deleted before pressing ENTER.

Procedure

To delete comments about a property item when the Item Inquiry/General Maintenance Menu is displayed, do the following:

1. Select function/option 03/06, Add/Update Comments and then type in the item ID of the property item and press ENTER.
   RESULT: The system displays existing comments about the item on the Add/Update Comments screen.

2. If the property item has no comments, the system displays a message stating “No comment records exist for this item ID”.

3. TAB to the blank space (in the DEL column) to the left of the comment that is to be deleted.

4. Type D and press ENTER.
   RESULT: The system will prompt the user to press PF9 to confirm deletion.

5. If the user wishes to confirm the deletion, press PF9.
   RESULT: The system will display a message stating “Comment records have been deleted”.

6. If the user does not wish to confirm the deletion, press PF11 and the deletion will be cancelled.

7. At this point, the user may perform one of the following functions:
   a. To add, change or delete another comment for this property item, perform the appropriate procedure outlined above.
   b. To view all comments for this property, press PF7.
   c. To delete comments about another property item, type over the item ID on the screen with the item ID of the item whose comments are to be deleted and press ENTER to display the new record then repeat the procedure as outlined above.
   d. To return to the Item Inquiry/General Maintenance Menu, BACKTAB to the Function/Option field at the top of the screen, type 0300 and press ENTER or press HOME, type 0300 and press ENTER.
   e. To return to the Property Management Main Menu, BACKTAB to the Function/Option field at the top of the screen, type 0000 (four zeros) and press ENTER or press HOME, type 0000 and press ENTER.
   f. To exit the system, press PF12.
Chapter 7 Search Functions

7.1 In This Chapter

This chapter provides instructions for retrieving information from the Property Management System. Each section in this chapter corresponds to an option on the Search Functions Menu.

This chapter is subdivided as follows:

- “Display Employee Names” provides instructions for retrieving the names and home departments of University employees.
- “Display Organizations” provides instructions for retrieving a list of all organizations
- “Display Buildings by Name” provides instructions for retrieving a list of University buildings, their code numbers and their addresses.
- “Display Floor and Room Information” provides instructions for retrieving lists of floors within University buildings and rooms on these floors.
- “List Items by PO Number” provides instructions for retrieving lists of property items associated with a specific PO number.
- “Display Categories” provides instructions for retrieving a list of University of property item categories and their codes.
7.2 Display Employee Names

Overview

The Display Employee Names function enables authorized operators to retrieve a list of University employees and their home organizations. This list contains all University employees, not just those that have been designated as property custodians.

This information may be displayed organized by employee name or Social Security Number. Please note: For security reasons, the Social Security Numbers are not displayed.

Specifying a Starting Point

From the Search Functions Menu, the employee name may be specified from where the user would like the list to begin. This can be accomplished by typing all or portion of the name following “Option 01 - enter employee name”.

A new name or Social Security Number may be specified on the Display Employee Names screen (a new name, by typing that name following “Display by Name, Starting from Name”, a new Social Security Number by typing that Social Security Number following “Display by SSN, Starting from SSN”).

Whenever the beginning of a new list is needed with a different start name, type all or any portion of the name beginning with the last name. If the user has more information on the name in addition to just the last name, type the full last name, followed by a comma and as much is know of the first name. For example:

a) To begin the list with employees whose last name begins with SM, type SM

b) To begin the list with employees whose last name is Smith and first name begins with J, type Smith,J.

If a nonexistent employee name is specified, the list is started with the next available name in alphabetical sequence.

If a name is already specified following “Display by Name, Starting from Name”, use the space bar to erase that name before entering a Social Security Number following “Display by SSN...”.

Similarly, if a Social Security Number is already specified following “Display by SSN...”, use the space bar to erase that Social Security Number before entering a name following “Display by Name...”.

In addition, to begin the list from the start either by name or Social Security Number, type an asterisk (*) in the appropriate position.
7.2 Display Employee Names

Scrolling Conventions

Use PF8 and PF7 to scroll forward and backward through the list as necessary.

Warning

If a list is started with a particular name, scrolling forward and backward will only be permissible from that starting name. Pressing PF7 will not display any information that precedes the specified name.

The scroll forward (PF8) function will only scroll through 50 pages. Since the list of employees will be more than 50 pages, it is always recommended to use the “Starting from” prompt at the top of the screen to position the search as close to the user’s desired starting point as possible.

Procedure

To retrieve the name or Social Security Number of a University employee when the Search Function is displayed:

1. Select function/option 02/01, Display Employee Names. To start the list with a specific employee name, type that name (last name first), following “Option 01 – enter employee name”.

2. Press ENTER

RESULT: The system displays the Display Employee Names screen. The list will begin at particular starting point if the user entered a start name. Otherwise, the list will begin with A, as illustrated in Figure 7-1.
7.2 Display Employee Names (continued)

3. Scroll back and forth through the list as necessary. (Scrolling conventions are outlined in the introductory text).

4. To reorganize the displayed information, perform one of the following:
   
   a. To begin the list with another name, type all or a portion of that name (as described in the conventions specified on the previous page) following “Display by name, starting from name”, press ENTER.

      RESULT: The system redisplay the information, beginning with the name that was typed.

   b. To display the list by Social Security Number, TAB to “Display by SSN, starting from SSN”, and type all or a portion of the Social Security Number from where the list should begin and press ENTER.

      RESULT: The system redisplay the information beginning with the employee whose number that was typed. (For security reasons, SSN is not displayed.)

   c. To redisplay the beginning of the list by name, TAB to “Display by Name, Starting from Name”, type an asterisk (*); TAB to “Display by SSN, Starting from SSN” and use the space bar to blank out this field, then press ENTER.

   d. To redisplay the beginning of the list by SSN, TAB to “Display by SSN, Starting from SSN”, type and asterisk (*), TAB to “Display by Name, Starting from Name” and use the space bar to blank out this field, then press ENTER.

5. Repeat step 3 as necessary.

6. Do one of the following:
   
   a. To return to the Search Functions Menu, BACKTAB to the Function/Option field at the top of the screen, type 0200 and press ENTER or press HOME, type 0200 and press ENTER.

   b. To return to the Property Management Main Menu, BACKTAB to the Function/Option field at the top of the screen, type 0000 (four zeros) and press ENTER. Or press HOME, type 0000 and press ENTER.

   c. To exit the system, press PF12.
7.3 Display Organizations

Overview

The Organizations Search function enables authorized operators to retrieve a list of University Organizations.

This information may be displayed arranged by ORG name or by ORG code. In the Property Management System, orgs are usually listed by name to retrieve the code number of a department that owns a property item. Orgs are usually listed by code to verify an ORG’s official name.

Specifying a Starting Point for the List

From the Search Functions Menu, the user may specify the organization for the list to begin with by typing all or a portion of that organization’s name following “Option 02 – enter organization name”.

A new organization name or organization code may be specified on the Display Departments screen (a new organization name, by typing that name following, “Display by ORG Name, Starting from ORG” and a new ORG code, by typing that number following “Display by ORG Code, starting from Code”).

If the user types a non-existent organization name or code, the list is started with the next available organization in alphabetical sequence or the next available organization code in numerical sequence.

If an organization name is already specified following “Display by ORG Name, Starting from Name, use the space bar to erase that organization name before entering an organization code following “Display by Code”.

Similarly, if an organization code is already specified following “Display by Code”, use the space bar to erase that organization code before entering an organization name following “Display by Name”.

In addition, to redisplay the organizations beginning at the top of the list (either by organization name or organization code number), type an asterisk (*) in the appropriate position.

Scrolling Conventions

Use PF8 and PF7 to scroll forward and backward through the list as necessary.

Warning

When a list is started with a specific starting point scrolling will only encompass information from that point forward. Any information preceding the specified starting point will not be displayed. The scroll forward function, PF8 will only scroll through 50 pages. Since a list of organizations could be more than 50 pages long, the use of the “Starting from” prompt is recommended.

Procedure

To retrieve a list of University organizations when the Search Functions Menu is displayed:

1. Select function/option 02/02, Display Organizations. To start the list with a specific ORG name, type the ORG name following “Option 02 – enter ORG name”.

2. Press ENTER
7.3 Display Organizations (continued)

RESULT: The system displays the Display ORG's screen. If the user specified a starting point, the list begins with the ORG specified. If the user did not specify a starting point, the list begins with A as illustrated in Figure 7-2.

```
<table>
<thead>
<tr>
<th>CODE</th>
<th>ORGANIZATION NAME</th>
</tr>
</thead>
<tbody>
<tr>
<td>9936</td>
<td>ABRAMSOM INSTITUTE AT PENN</td>
</tr>
<tr>
<td>9936</td>
<td>ABRAMSOM INSTITUTE AT PENN</td>
</tr>
<tr>
<td>ACAU</td>
<td>ACADEMIC ADMINISTRATIVE UNITS</td>
</tr>
<tr>
<td>ACAU</td>
<td>ACADEMIC ADMINISTRATIVE UNITS</td>
</tr>
<tr>
<td>ACAU</td>
<td>ACADEMIC DEPTMENTS</td>
</tr>
<tr>
<td>ACAU</td>
<td>ACADEMIC DEPTMENTS</td>
</tr>
<tr>
<td>8511</td>
<td>ACADEMIC ENRICHMENT PROGRAMS</td>
</tr>
<tr>
<td>8511</td>
<td>ACADEMIC ENRICHMENT PROGRAMS</td>
</tr>
<tr>
<td>APR</td>
<td>ACADEMIC PROGRAMS (OBSCOLE)</td>
</tr>
<tr>
<td>APIA</td>
<td>ACADEMIC PROGRAMS IN RESIDENCE</td>
</tr>
<tr>
<td>APIA</td>
<td>ACADEMIC PROGRAMS IN RESIDENCE</td>
</tr>
</tbody>
</table>
```

** PRESS PF8 TO SEE MORE DATA
Enter-PF1--PF2--PF3--PF4--PF5--PF6--PF7--PF8--PF9--PF10--PF11--PF12---
HELP EHELP PREV BACK FUD EXIT

Figure 7-2 Display Organizations Screen

3. Scroll back and forth through the list, as necessary (Scrolling conventions are outlined in the introductory text).

4. To reorganize the displayed information, perform one of the following.
   a. To begin the list with another ORG, type all or a portion of the ORG's name, following “Display by ORG Name, Starting from Name”; press ENTER.

      RESULT: The system redisplays the information beginning with the ORG name that has been typed.

   b. To display the list by ORG code number, TAB to “Display by ORG Code, Starting from Code”, type all or a portion of the ORG code number with which you wish to begin the list. Press ENTER.

   c. To redisplay the beginning of the list by ORG name, TAB to “Display by ORG Name, Starting from Name”, type an asterisk (*), TAB to Display by ORG Code, Starting from Name”, and use the space bar to blank out this field, then press ENTER.

5. Repeat step 3 as necessary.
7.3 Display Organizations (continued)

6. Do one of the following:

   a) To return to the Search Functions Menu, BACKTAB to the Function/Option field at the top of the screen, type 0200, and press ENTER. Or press HOME, type 0200 and press ENTER.

   b) To return to the Property Management Main Menu, BACKTAB to the Function/Option field at the top of the screen, type 0000 (four zeros), and press ENTER. Or press HOME, type 0000 and press ENTER.

   c) To exit the system, press PF12.
7.4 Display Buildings by Name

Overview

The Display Buildings by Name function enables authorized operators to retrieve a list of all University buildings. In addition to the building name, the list includes the code number and the street address.

Note: The building codes, names and addresses displayed here and used throughout the Property Management System are defined and maintained by the Facilities and Real Estate Services. This information can also be found at the following web address:

http://www.facilities.upenn.edu/mapsBldgs/

Specifying a Starting Point for the List

From the Search Functions Menu, the user may specify the building with which to have the list begin by typing the first letter only of that building following “Option 03 – Enter Building Name”. From there, scroll through the list of buildings to reach the desired building name.

The user may also specify a new building on the Display Buildings by Name screen by typing the first letter only of that building name following “Start display from building name”. From there, scroll through the list of buildings to reach the desired building name.

If the user types a non-existent building name, the list will be started with the next available building in alphabetical sequence.

Additionally, to display the building names at the start of the list, type an asterisk (*) following “Start display from building name”.

Scrolling Conventions

Use PF7 and PF8 to scroll forward and backward through the list as necessary.

The user may also display the rooms within a building from this screen. Rooms within buildings are displayed by floor. That is, only the rooms on the first floor of the building are listed when the user selects a building whose floors and rooms are selected to display. To view the list of rooms on subsequent floors in that building, press PF8. In order to return to a previous screen, type PF7. Note that numbered floors are always displayed before named floors.

Warning

When a list is started with a specific starting point scrolling will only encompass information from that point forward. Any information preceding the specified starting point will not be displayed. The scroll forward function, PF8 will only scroll through 50 pages. Since a list of buildings could be more than 50 pages long, the use of the “Starting from” prompt is recommended.

Procedure

To retrieve a list of University buildings when the Search Functions Menu is displayed:
7.4 Display Buildings by Name (continued)

1. Select function/option 02/03, Display Building by Name. To begin the list with a specific building, type that building’s name following “Option 03 - enter building name”.

2. Press ENTER.

RESULT: The system displays the Display Buildings by Name screen. If a specific start point was input, the list begins with the building name specified. If a starting point was not specified, the list begins with A, as illustrated in Figure 7-3.

3. Scroll back and forth through the list as necessary. Scrolling conventions are outlined in the introductory text.

4. To restart the list with a specific building, type that building’s name following “Start Display from Building Name” and press ENTER. To redisplay the beginning of the list, type an asterisk (*) following “Start Display from Building Name”.

5. To view a list of floors and room within a specific building, TAB to the S column preceding that building’s code, type S and press ENTER.

RESULT: The system displays a list of the room numbers on the first floor of that building. Scroll through the list as necessary, scrolling conventions are outlined in the introductory text.

6. Repeat steps 3, 4 and 5 as necessary.

7. To return to the Display Buildings by Name screen, press PF3.
7.4 Display Buildings by Name (continued)

8. Perform one of the following:
   
   a. To return to the Search Functions Menu, BACKTAB to the Function/Option field at the top of the screen, type 0200 and press ENTER.

   b. To return to the Property Management Main Menu, BACKTAB to the Function/Option field at the top of the screen, type 0000 (four zeros) and press ENTER, or press HOME, type 0000 and press ENTER.

   c. To exit the system, press PF12.
7.5 Display Floor and Room Information

Overview

The Display Floor and Room Information function enables authorized operators to retrieve lists of floors within University Buildings and rooms on these floors.

Specifying a Starting Point for the List

From the Search Functions Menu, information may be displayed beginning with a specific building and floor. This can be done by typing the building code following Option 04 – “Enter building code”, and if appropriate, the floor name or number after “Floor”.

A new building and floor may also be specified by typing that building following “Building code” and the floor name or number following “Start Building from Floor”.

If a non-existent floor name or number is typed, the list is started with the next available floor in sequence (See Warning below).

In addition, if a redisplay of the list from the beginning is needed, type an asterisk (*) following “Start Display from Floor”.

Scrolling Conventions

Rooms within buildings are displayed by floor. Only the rooms on the first floor of the building are listed when it is decided which floors and rooms are needed to be displayed. Use PF8 and PF7 to scroll forward and backward through the list as necessary.

Warning

Numbered floors are always displayed before named floors. For example, the first floor is displayed before the basement. If the list is started with a floor other than the first numbered floor, the user will only be able to scroll from that starting point forward. Pressing PF7 will not display any information that precedes the specified floor.

Procedure

To retrieve a list of University buildings when the Search Functions Menu is displayed:

1. Select function/option 02/04, Display Floor and Room Information. If the user wishes to begin the list with a specific building, or a specific building and floor, type that building's code following “Option 04 – enter building code” and if appropriate, the floor name or number after “Floor”.

2. Press ENTER.

RESULT: The system displays the Display Buildings by Name screen. If he user specified a building and floor, the list begins with the first floor in he specified building, as illustrated in Figure 7-4.
7.5 Display Floor and Room Information (continued)

3. Scroll back and forth through the list as necessary. Scrolling conventions are outlined in the introductory text.

4. To redisplay the list beginning with the first floor, type an asterisk (*) following “Start Display ...” and press ENTER.

5. To display the list beginning with a different building, type that building’s code following “Building Code” and press ENTER.

RESULT: The system redispals the information, beginning with the building code that was typed.

6. To display the list beginning with a different building and floor, type that building and floor, type that building’s code following “Building Code” and the floor’s name or number following “Start Display from Floor”.

RESULT: The system redispals the information, beginning with the building code and floor name or number that was typed.

7. Repeat steps 3, 4, 5 and 6 as necessary.
7.5 Display Floor and Room Information (continued)

8. Perform one of the following steps:

   a. To return to the Search Functions Menu, BACKTAB to the Function/Option field at the top of the screen, type 0200 and press ENTER or press HOME, type 0200 and press ENTER.

   b. To return to the Property Management Menu, BACKTAB to the Functions/Option field at the top of the screen, type 0000 (four zeros) and press ENTER or press HOME, type 0000 and press ENTER.

   c. To exit the system, press PF12.
7.6 List Items by PO Number

Overview

The List Items by PO Number function enables authorized operators to retrieve a list of property items associated with a specific PO number.

On the list items by PO Number screen, a PO number must be supplied for the system to generate a list. After a PO number is specified, the system will provide a list of all property items associated with that PO number and will list these items in order according to their ID numbers.

To View Additional Information about a Property

If the user wishes to see additional information about a specific property item on the list, TAB to the ACT field to the left of the item, type an S in the ACT field and press ENTER. The system will take the user to the Display Description/Responsibility screen (03/01), on which a variety of information about the property selected will be displayed. To return to the item list press PF3.

Scrolling Conventions

Use PF8 and PF7 to scroll forward and backward through the list as necessary.

Procedure

To retrieve a list of property items when the Search Functions Menu is displayed:

1. Select option 05, List Items by PO Number. To generate a list of property items associated with a particular PO number, type that PO number following the PO number field.

2. Press ENTER.

RESULT: The system displays the List Items by PO Number screen. Property items associated with the specified PO number are listed in order according to their item ID numbers, as illustrated in Figure 7-5.

![Figure 7-5 List Items by PO Number Screen](image-url)
7.6 List Items by PO Number (continued)

1. Scroll back and forth through the list, as necessary. Scrolling conventions are outlined in the introductory text.

2. To view additional information about a specific property item:
   a. TAB to the ACT column preceding that property item’s number and press ENTER.
      
      RESULT: The system will take the user to the Display Description/Responsibility screen (03/01), on which a variety of information about the property item that was selected.
   b. To return to the List Items by PO Number screen, press PF3.

3. To display a list of property items for a different PO Number, TAB to the PO Number field, type the new PO number and press ENTER.

4. Repeat steps 2 and 3 as necessary.

5. Perform one of the following:
   a. To return to the Search Function Menu, BACKTAB to the Function/Option field at the top of the screen, type 0200 and press ENTER.
   b. To return to the Property Management Main Menu, BACKTAB to the Function/Option field at the top of the screen, type 0000 (four zeros) and press ENTER, or press HOME, type 0000 and press ENTER.
   c. To exit the system, press PF12.
7.7 Display Categories

Overview

The Display Categories function enables authorized operators to retrieve a list of University property item categories and their codes.

Specifying a Starting Point for the List

On the Display Categories screen, the user may specify the category name or category code with which the user would want the list to begin. A category name can start the list by typing a category name following “Display by name, starting from name” or a category code by typing that code following “Display by code, starting from code”, and press ENTER.

If the user types a non-existent category name or code, the list is started with the next available category in alphabetical sequence or the next available category code in numerical sequence.

From the Search Functions Menu, if a category name is already specified following “Display by Name, Starting from Name”, use the space bar to erase that category name before entering a new category code following “Display by Code, Starting From Code”.

Similarly, if a category code is already specified following “Display by Code…”, use the space bar to erase that category code before entering a category name following “Display by Name, Starting From Name”.

In addition, any list can be redisplayed beginning at the top of the list, either by category name or category code, type an asterisk (*) in the appropriate position and press ENTER.

Scrolling Conventions

Use PF7 and PF8 to scroll forward and backwards through the list as necessary.

Warning

If a list is started with a specific category, the user will only be able to scroll from that point forward. Pressing PF7 will not display any information that precedes the specified category.

If a list is started with a specific category, the user will only be able to scroll through 50 pages. Since the list of categories could be more than 50 pages long, it is recommended to use the “Starting from” prompt at the top of the screen to position the search as close as possible to where the user wants the list to start.
7.7 Display Categories (continued)

Procedure

To retrieve a list of University property item categories when the Search Functions Menu is displayed:

1. Select option 06, Display and press ENTER.

RESULT: The system displays the Display Categories screen, with the list beginning at A, as illustrated in Figure 7-6.

<table>
<thead>
<tr>
<th>CODE</th>
<th>CATEGORY NAME</th>
<th>USEFUL LIFE</th>
<th>CATEGORY STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>03240</td>
<td>ABSORBERS</td>
<td>10</td>
<td>A - ACTIVE CODE</td>
</tr>
<tr>
<td>29040</td>
<td>ABSORPTIONMETERS</td>
<td>10</td>
<td>A - ACTIVE CODE</td>
</tr>
<tr>
<td>29119</td>
<td>ACCELEROMETERS</td>
<td>10</td>
<td>A - ACTIVE CODE</td>
</tr>
<tr>
<td>16050</td>
<td>ACCESSORIES(STAGES,STANDS,ETC)</td>
<td>10</td>
<td>A - ACTIVE CODE</td>
</tr>
<tr>
<td>03060</td>
<td>ACOUSTIC EQPT.</td>
<td>8</td>
<td>A - ACTIVE CODE</td>
</tr>
<tr>
<td>05310</td>
<td>ACTUATOR</td>
<td>10</td>
<td>A - ACTIVE CODE</td>
</tr>
<tr>
<td>02050</td>
<td>ADDRESSING/MAILING EQUIPMENT</td>
<td>10</td>
<td>A - ACTIVE CODE</td>
</tr>
<tr>
<td>12070</td>
<td>AIR COMPRESSOR</td>
<td>15</td>
<td>A - ACTIVE CODE</td>
</tr>
<tr>
<td>12020</td>
<td>AIR CONDITIONER (OTHER)</td>
<td>10</td>
<td>A - ACTIVE CODE</td>
</tr>
<tr>
<td>12010</td>
<td>AIR CONDITIONER (SMALL)</td>
<td>5</td>
<td>A - ACTIVE CODE</td>
</tr>
<tr>
<td>18120</td>
<td>AIRFUGES</td>
<td>10</td>
<td>A - ACTIVE CODE</td>
</tr>
</tbody>
</table>

** PRESS PF8 TO SEE MORE DATA
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
HELP EHELP PREV BACK FWD EXIT

Figure 7-6 Display Categories Screen

2. Scroll back and forth through the list, as necessary. Scrolling conventions are outlined in the introductory text.

3. To reorganize the displayed information, perform one of the following:

   a. To begin the list with another category, type all or a portion of that category’s name following “Display by Name, Starting From Name”, press ENTER.

RESULT: The system redisplayed the information beginning with the category name that has been typed.

   b. To display the list by code number, TAB to “Display by Code, Starting from Code”, type all or a portion of the category code number to begin the list and press ENTER.

RESULT: The system redisplayed the information, beginning with the category code that was typed.
7.7 Display Categories (continued)

c. To redisplay the beginning of the list by category name, TAB to “Display by name, starting from name”, type an asterisk (*); TAB to “Display by code, starting from code” and use the space bar to blank out this field and then press ENTER.

d. To redisplay the beginning of the list by category code, TAB to “Display by code, starting from code”, type an asterisk (*); TAB to “Display by name, starting from name” and use the space bar to blank out this field and then press ENTER.

6. Repeat step 3 as necessary.

7. Perform one of the following:

a. To return to the Search Functions Menu, BACKTAB to the Function/Option field at the top of the screen, type 0200 and press ENTER, or press HOME, type 0200 and press ENTER.

b. To return to the Property Management Main Menu, BACKTAB to the Function/Option field at the top of the screen, type 0000 (four zeros) and press ENTER, or press HOME, type 0000, and press ENTER.

c. To exit the system, press PF12.
Chapter 8 Standard Reports

8.1 In This Chapter

This chapter provides instructions for selecting, customizing and submitting report requests in the Property Management System.

All report requests are submitted online but the actual reports are produced at night. Report output is available the next working day at Information Systems and Computing (ISC), 3401 Walnut St., Suite 265B. If the user does not have a designated bin for report output, contact the Manager of Computer Operations at 8-8715 to have one assigned.

Each section in this chapter corresponds to an option on the Online Report Selection Menu. This chapter is subdivided as follows:

- **“Property Item Listing”** provides instructions for submitting a Property Item Listing report and for selecting optional parameters to customize that report.

- **“Table of Fields-Screen 04/01”** lists and describes the field on the Property Item Listing screen.

- **“Pre-Acquisition Screening Report”** provides instructions for using the 04/01 screen to produce the appropriate inventory report for Pre-Acquisition Screening Procedure.

- **“Dept Code/Name/Administrator Cross-Ref”** provides instructions for submitting an ORG Code/Name/Administrator Cross-Reference report request.

- **“Property Custodians by Organization”** provides instructions for submitting a Property Custodians by Organization report request.

- **“Building Code/ Name Cross Ref-List”** provides instructions for submitting a Building Code/Name Cross-Reference report request.

- **“Category Code Listing”** provides instructions for submitting a Category Code Listing report request.


### 8.2 Property Item Listing

#### Overview

This screen enables authorized operators to request a Property Item Listing Report.

The body of the Property Item Listing is divided into three data entry areas. The first area prompts for information that is required to generate the report. The second and third areas prompt for optional information that can be supplied to customize the report.

#### Basic or Full

The listing requested may be a basic or full listing.

A basic listing contains general information about property items. One item is listed on each page of the report.

A full listing contains complete, detailed information about property items. Approximately five items are listed on each page of the report.

Any authorized user can select a basic or full listing, but only PMG and Office of Research Services (ORS) can request these listings without specifying an organization or center. All other users must specify an organization or a center and the specific organization or center must be one that the user is authorized to update.

#### Customizing the Report

Whether a basic or full listing is selected, the report can be customized to include retired items, only items converted from SEMS, or items whose acquisition date is within a given time period. These prompts are listed in the middle of the screen under the heading “Optional”. All these options can be included in the same report. Refer to Step 4 in the Procedure section of the “Property Item Listing” for information on using these options.

A report can be further customized to include item attributes, item group characteristics and report sequence options. These additional parameters are accessed through the bottom area of the “Property Item Listing” screen under the heading “Do you wish to see more options?” The default is “Y” which automatically brings the user to three consecutive pop-up windows where additional parameters may be selected. Refer to Step 5 in the Procedure section of “Property Item Listing” for information on accessing and using the pop-up windows.

#### Procedure

To request a property item listing when the Online Report Selection Menu is displayed:

1. Select function/option 04/01, Property Item Listing – Basic or Full
2. Press ENTER.

RESULT: The system displays the Property Item Listing screen. See Figure 8-1.
8.2 Property Item Listing (continued)

3. Does the user wish to select the full listing?
   a. If yes, type F over the default response in the Report Type field.
   b. If no, go to Step 4.

4. Does the user wish to restrict the list of property items owned by a specific organization or center?
   Note: This restriction by organization or center is required for all users except those in the PMG or ORS.
   a. If yes, in order to request a list of property items owned by one organization, TAB to “Organization” on the next line and the code of the organization
      To request a list of property items owned by one center, TAB to the “Center” on the next line and type the code of the center.
   b. If no, go to Step 5.

5. Does the user wish to specify that the report include retired items, items converted or not converted from SEMS (Space and Equipment Management System), or only items acquired within a specific time frame?
   a. If yes, follow the instructions on the table below.
   b. If no, go to Step 6.

---

**Figure 8-1 Property Item Listing Screen**

---

Enter:PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
HELP:EHHELP:PREV:CFRM:CMCL:EXIT


8.2 Property Item Listing (continued)

<table>
<thead>
<tr>
<th>To Include This In The Report...</th>
<th>Type This ...</th>
<th>Following This Prompt ...</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Both retired and active items</td>
<td>Y</td>
<td>Include retired items? (Y/N) --</td>
<td>Default is N, exclude retired items.</td>
</tr>
<tr>
<td>Both converted and non-converted items</td>
<td>A</td>
<td>Select converted, non-converted, or all items? (C/N/A)</td>
<td>Default is A, include both converted and non-converted items.</td>
</tr>
<tr>
<td>ONLY items converted from SEMS</td>
<td>C</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ONLY items not converted from SEMS</td>
<td>N</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Only items acquired during a specific time frame</td>
<td>The beginning date in the MM/DD/YY format The end date in the MM/DD/YY format</td>
<td>From To</td>
<td>When a &quot;from&quot; date is specified, the &quot;to&quot; date is optional. Note: Acquisition Date is base on when the item is paid rather than when the item is received.</td>
</tr>
</tbody>
</table>

6. Does the user wish to specify additional selection parameters or report sequence options?

   a. If no, TAB to the “Do you wish to see more options?” field and type N over the default response. Go to step 7.

   b. If yes, press ENTER.

RESULT: The system displays the first of three sequential pop-up windows that requests one or none of the options listed be specified. See Figure 8-2.
7. Follow the instructions on the tables below. Each table corresponds to one of the pop-up windows:

- PF2 takes the user to element Help on any of the updatable fields as long as the cursor is position on the proper field.

- PF11 clears what has been typed so new information may be entered.
8.2 Property Item Listing (continued)

**Item Attributes Pop-Up Window**

<table>
<thead>
<tr>
<th>To Include This In The Report...</th>
<th>Type This ...</th>
<th>Following This Prompt...</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Only surplus items</td>
<td>Y</td>
<td>Surplus items? (Y/N)</td>
<td>Default is N, include both surplus and non surplus items.</td>
</tr>
<tr>
<td>Only items that PMG can tag</td>
<td>Y</td>
<td>PMG items? (Y/N)</td>
<td>Default is N, include both Dept and PMG items.</td>
</tr>
<tr>
<td>Only government property items</td>
<td>Y</td>
<td>Gov't items? (Y/N)</td>
<td>Default is N, include both University and government property items.</td>
</tr>
<tr>
<td>Only items with a specific acquisition cost</td>
<td>The cost of the least expensive item to be included in the report</td>
<td>Acquisition cost from To</td>
<td>&quot;From&quot; can be specified without a &quot;to.&quot;</td>
</tr>
</tbody>
</table>

8. After specifying one or none of the options in the first pop-up window, press ENTER to confirm the selection.

RESULT: The system displays the second of three sequential pop-up windows that asks the user to specify one of none of the attributes.
8.2 Property Item Listing (continued)

9. Does the user wish to include in the report only items funded by a group of account numbers or only items in a specific group of categories?

   a. If yes, type one or more digits of the sub ledger account number in the Account Number field or one or more digits of the category code in the Category Code field and follow with an asterisk (*), and press ENTER.

   RESULT: The system displays a pop-up window with report sequence options specific to an account number or category code. The user may choose from the options provided in this pop-up window and press ENTER, or simply press ENTER to select the default option. See Figure 8-4.
8.2 Property Item Listing (continued)

Figure 8-4 Property Item Listing screen with the Account Number Report Sequence Options Pop-up Window Displayed

b. If no, specify one or none of the options in the second pop-up window, and press ENTER to confirm the selection.

RESULT: The system displays the third of three sequential pop-up windows that asks you to specify one or none of the options listed. See Figure 8-5.
### 8.2 Property Item Listing (continued)

**Report Sequence Options Pop-Up Window**

<table>
<thead>
<tr>
<th>To Sort The Report By...</th>
<th>Type This ...</th>
<th>Following This Prompt...</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>The ID numbers of the selected property items</td>
<td>Nothing, as 00 is the system default for this set of options</td>
<td>Select option number</td>
<td></td>
</tr>
<tr>
<td>The building/location codes of the selected property items</td>
<td>01</td>
<td>Select option number</td>
<td>Floor and room within each building. Totals for each building.</td>
</tr>
<tr>
<td>The owning organization/location codes of the selected property items</td>
<td>02</td>
<td>Select option number</td>
<td>Location (building, floor, room) within organization. Totals for each organization, and subtotals for each building within that organization.</td>
</tr>
<tr>
<td>The category/owning organizations of the selected property items</td>
<td>03</td>
<td>Select option number</td>
<td>Organization within category. Totals for each category, and sub-totals for each organization within that category.</td>
</tr>
<tr>
<td>The purchase order number of the selected property items</td>
<td>04</td>
<td>Select option number</td>
<td></td>
</tr>
<tr>
<td>The center/category codes of the selected property items</td>
<td>05</td>
<td>Select option number</td>
<td>Category within center. Totals for each center, and sub-totals for each category within that center.</td>
</tr>
</tbody>
</table>
8.2 Property Item Listing (continued)

10. When all the optional information has been provided, press ENTER.

RESULT: The system displays a pop-up window requesting such output control information as logon password, bin number, number of copies, and form options. See Figure 8-5.

![Figure 8-5 Property Item Listing Screen with Output Control Information Pop-up Window Displayed](image)

11. The following PF keys are active on this screen:

- PF2 takes the user to element Help on any of the four updatable fields, if the cursor is positioned on the field to be queried.

- PF3 takes the user to the Property Item Listing screen and ignores any output control information that was entered.

12. Complete all information on the output control information screen and press ENTER. For further instructions, see Table of Fields, screen 04/01.

RESULT: The system again displays the Property Item Listing screen, including the updated information and a message stating “Press PF9 to submit request or ENTER to make changes”.

WARNING: The user’s logon password must be entered correctly or the system will not allow the user to submit a report request. The system does not check the password until a report request has been submitted. At that time, if the user typed an incorrect password, the system will provide an error message. The user has only three attempts to correct a password. After three incorrect passwords, the logon ID will be suspended.
8.2 Property Item Listing (continued)

13. Does the user wish to view and/or change any of the information that was entered prior to submitting the report request?
   
a. If yes, press ENTER and then repeat steps 3 through 12, as necessary.

b. If no, press PF9 to send the report request.
   
   RESULT: The system displays a verification message at the top of the Property Item Listing screen confirming both the job and bin number.

14. Perform one of the following:
   
a. To return to the Online Report Selection Menu, BACKTAB to the Function/Option field at the top of the screen, type 0400 and press ENTER or press HOME, type 0400 and press ENTER.

b. To return to the Property Management Main Menu, BACKTAB to the Function/Option field at the top of the screen, type 0000 (four zeros) and press ENTER, or press HOME and type 0000 and press ENTER.

c. To exit the system, press PF12.
### 8.3 Table of Fields - Screen 04/01

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report type</td>
<td>Must be either B (Basic) or F (Full).</td>
<td>A basic report lists basic information about a property item.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>A full report lists ALL information about a property item.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Defaults to B.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Required.</td>
</tr>
<tr>
<td>Organization</td>
<td>The organization responsible for the property item.</td>
<td>Required, if center is left blank.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Except for users in the PMG or Office of Research Services, you must have update access to the organization you list here.</td>
</tr>
<tr>
<td>Center</td>
<td>The center responsible for the property item.</td>
<td>Required, if organization is left blank.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Except for users in the PMG or Office of Research Services, you must have update access to the center you list here.</td>
</tr>
</tbody>
</table>
8.3 Table of Fields 04/01 (continued)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retired items</td>
<td>Whether or not to include retired items in the report.</td>
<td>Y means include retired items.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>N means exclude retired items.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Defaults to N.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Optional.</td>
</tr>
<tr>
<td>Converted items</td>
<td>Whether or not to include converted items in the report.</td>
<td>A means include both converted and non converted items.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>C means include converted items only.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>N means include non converted items only.</td>
</tr>
<tr>
<td></td>
<td>Converted items were converted from the old SEMS System and have not been</td>
<td>Defaults to A.</td>
</tr>
<tr>
<td></td>
<td>audited by the PMG.</td>
<td>Optional.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Acquisition</td>
<td>Date range within which property items were acquired.</td>
<td>Format must be (MM/DD/YY).</td>
</tr>
<tr>
<td>dates</td>
<td></td>
<td>If the “from” date is supplied, the “to” date must be either blank or a</td>
</tr>
<tr>
<td></td>
<td></td>
<td>date later than or equal to the “from” date.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If the “from” date is left blank, the “to” date must also be blank.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Optional.</td>
</tr>
</tbody>
</table>
### 8.3 Table of Fields 04/01 (continued)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>More Options</td>
<td>Additional selection and report sequence options possible through pop-up windows</td>
<td>Y to view a list of additional selection and report sequence options. N to ignore all additional selection and report sequence options. Only one selection is allowed per pop-up window.</td>
</tr>
<tr>
<td>Logon password</td>
<td>The password used to log onto the CICS region to access the Property Management System.</td>
<td>Required</td>
</tr>
<tr>
<td>Bin number</td>
<td>The bin number at Information Systems and Computing (ISC) (3401 Walnut) where the report is delivered</td>
<td>Required. If the user does not have a BIN at (ISC), call the Manager, Computer Operations (8-8715) to have one assigned.</td>
</tr>
<tr>
<td>Number of copies</td>
<td>The number of report copies you want printed.</td>
<td>Optional. The number must be less than or equal to the &quot;maximum allowed&quot; displayed on the screen. Defaults to 1.</td>
</tr>
<tr>
<td>Form option</td>
<td>How you want the report to be printed.</td>
<td>Optional. Number to be entered corresponds to the option numbers listed below the &quot;Form option&quot; field.</td>
</tr>
</tbody>
</table>
8.4 Pre-Acquisition Screening Report

The following tables provide input parameters for the 04/01 screen to produce the appropriate inventory report for the Pre-Acquisition Screening Procedure. The three types of inventory reports are:

- Department Inventory Report
- Center Inventory Report
- University-wide Inventory Report

The Department Inventory Report is used to screen for equipment costing at least $5,000, but not more than $15,000. This screening is conducted at the department level.

### Department Inventory Report

<table>
<thead>
<tr>
<th>Field</th>
<th>You Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report type</td>
<td>B (Basic)</td>
</tr>
<tr>
<td>Department</td>
<td>Your Department Code</td>
</tr>
<tr>
<td>Center</td>
<td>Leave blank</td>
</tr>
<tr>
<td>Include retired items</td>
<td>N (No)</td>
</tr>
<tr>
<td>Select converted, non-converted, or all items</td>
<td>A (All)</td>
</tr>
<tr>
<td>Select only acquisition date range</td>
<td>Leave blank</td>
</tr>
<tr>
<td>Item attribute options:</td>
<td></td>
</tr>
<tr>
<td>Only surplus items</td>
<td>N</td>
</tr>
<tr>
<td>Only PMG Items</td>
<td>N</td>
</tr>
<tr>
<td>Only Govt Items</td>
<td>N</td>
</tr>
<tr>
<td>Only acquisition cost from</td>
<td>5000</td>
</tr>
<tr>
<td>to</td>
<td>15000</td>
</tr>
<tr>
<td>Item group options</td>
<td>Do not specify any parameters within the Item Group Options window</td>
</tr>
<tr>
<td>Sort Sequence</td>
<td>02 (Location within Department)</td>
</tr>
</tbody>
</table>
### 8.4 Pre-Acquisition Screening Report (continued)

#### Center Inventory Report

<table>
<thead>
<tr>
<th>Field</th>
<th>You Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report type</td>
<td>B (Basic)</td>
</tr>
<tr>
<td>Department</td>
<td>Leave blank</td>
</tr>
<tr>
<td>Center</td>
<td>Your Center Code</td>
</tr>
<tr>
<td>Include retired items</td>
<td>N (No)</td>
</tr>
<tr>
<td>Select converted, non-converted, or all items</td>
<td>A (All)</td>
</tr>
<tr>
<td>Select only acquisition date range</td>
<td>Leave blank</td>
</tr>
<tr>
<td>Item attribute options:</td>
<td></td>
</tr>
<tr>
<td>Only surplus items</td>
<td>N</td>
</tr>
<tr>
<td>Only PMG Items</td>
<td>N</td>
</tr>
<tr>
<td>Only Govt Items</td>
<td>N</td>
</tr>
<tr>
<td>Only acquisition cost from</td>
<td>15001</td>
</tr>
<tr>
<td>to</td>
<td>25000</td>
</tr>
<tr>
<td>Item group options</td>
<td>Do not specify any parameters within the Item Group Options window</td>
</tr>
<tr>
<td>Sort Sequence</td>
<td>02 (Location within Department)</td>
</tr>
</tbody>
</table>
### 8.4 Pre-Acquisition Screening Report (continued)

**University-Wide Inventory Report**

<table>
<thead>
<tr>
<th>Field</th>
<th>You Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report type</td>
<td>B (Basic)</td>
</tr>
<tr>
<td>Department</td>
<td>Leave blank</td>
</tr>
<tr>
<td>Center</td>
<td>Leave blank</td>
</tr>
<tr>
<td>Include retired items</td>
<td>N (No)</td>
</tr>
<tr>
<td>Select converted, non-converted, or all items</td>
<td>A (All)</td>
</tr>
<tr>
<td>Select only acquisition date range</td>
<td>Leave blank</td>
</tr>
<tr>
<td><strong>Item attribute options:</strong></td>
<td></td>
</tr>
<tr>
<td>Only surplus items</td>
<td>N</td>
</tr>
<tr>
<td>Only PMG Items</td>
<td>N</td>
</tr>
<tr>
<td>Only Govt Items</td>
<td>N</td>
</tr>
<tr>
<td>Only acquisition cost from</td>
<td>25001</td>
</tr>
<tr>
<td>to</td>
<td>Leave blank</td>
</tr>
<tr>
<td><strong>Item group options</strong></td>
<td></td>
</tr>
<tr>
<td>Do not specify any parameters within the Item Group Options window</td>
<td></td>
</tr>
<tr>
<td><strong>Sort Sequence</strong></td>
<td>02 (Location within Organization)</td>
</tr>
</tbody>
</table>
8.5 ORG Code/ Name/ Administrator Cross-Ref

Overview

This screen enables authorized operators to request an Organization Code/Name/Administrator Cross-Reference report. This report lists the organization code, organization name and property administrator for each Department.

On the ORG Code/Name/Administrator Cross-Ref Screen, the only data entry area is the Report Sort Option field. This field allows the operator to request the report sorted according to Organization Code or Organization Name. Sorting options may be requested from this screen.

Sorting Options

The user must select one of the three sorting options listed below the Report Sort Option field.

Output Control Information

After the user selects one of the sorting options and presses ENTER, the pop-up output control information screen will appear. If the user has already entered the logon password in a previous output control information screen, the system will not ask for the password a second time. The system will also retain the same bin number previously typed in. Before submitting a report request, however, the user may change the bin number.

Procedure

To request an organization code/name/administrator cross reference when the Online Report Selection Menu is displayed:

1. Select function/option 04/02, ORG Code/Name/Administrator Cross-Ref and press ENTER.

   RESULT: The system displays the ORG Code/Name/Administrator Cross-Ref screen. See Figure 8-6.

![Figure 8-6 ORG Code/ Name/ Administrator Cross-Ref Screen](image)
8.5 ORG Code/ Name/ Administrator Cross-Ref (continued)

2. Select a report sorting option by typing 1, 2 or 3 in the Report Sort Option field and press ENTER.

RESULT: The Logon Password field may or may not be present on this screen. If the user has already entered the logon password in a previous output control information screen, the system will not ask for the password a second time.

![Figure 8-7 ORG Code/ Name/ Administrator Cross Ref-Screen with the Output Control Information Pop-up Window Displayed](image)

3. The following PF keys are active on this screen:
   - PF2 takes the user to element Help on any of the four updatable fields, if the cursor is positioned on the field to be queried.
   - PF3 takes the user to the ORG Code/Name/Administrator Cross-Ref screen and ignores any output control information that was entered.

4. Complete all the information on the output control information screen and press ENTER. For further instructions, see Table of Fields, screen 04/01.

RESULT: The system again displays the ORG Code/Name/Administrator Cross-Ref screen, including the updated information and a message stating “Press PF9 to submit report request or ENTER to make changes.

WARNING: The user’s logon password must be entered correctly on the system or the user will not be permitted to submit a report request. The system does not check the user’s password until a report request is submitted. At that time, if the user typed an incorrect password, the system will provide an error message. The user has only three attempts to correct a password. After three incorrect passwords, the logon ID will be suspended.
8.5 ORG Code/ Name/ Administrator Cross-Ref (continued)

5. Does the user wish to view or change any of the information that has been entered before submitting the report request?
   a. If yes, press ENTER and repeat the above steps as necessary.
   b. If no, press PF9 to send the report request.

RESULT: The system displays a verification message at the top of the ORG Code/Name/Administrator Cross-Ref screen confirming both the job and bin number.

6. Perform one of the following:
   a. To return to the Online Report Selection Menu, BACKTAB to the Function/Option field at the top of the screen, type 0400 and press ENTER, or press HOME, type 0400 and press ENTER.
   b. To return to the Property Management Main Menu, BACKTAB to the Function/Option field at the top of the screen, type 0000 (four zeros) and press ENTER, or press HOME, type 0000 and press ENTER.
   c. To exit the system, press PF12.
8.6 Property Custodians by Organization

Overview

This screen enables authorized operators to request a Property Custodians by Organization report. This report lists the name of any individual who has been designated as the custodian of at least one property in the organization. The organization here refers to the organization that owns the property and not the home organization of the custodian.

On the Property Custodians by Organization Screen, the operator may request that the report list custodians in a specific center or organization, but not both. If neither a center nor an organization code is specified, the system will generate a report of custodians in all organizations and centers.

Output Control Information

When the user is ready to submit the report request, press ENTER, and the pop-up output control information screen will appear. If the user has already entered their logon password in a previous output control information screen, the system will not ask the user for the password a second time. The system will also retain the same bin number previously typed in. Before a report request is submitted, the user may change the output bin number.

Procedure

To request a report of property custodians by Organization when the Online Report Selection Menu is displayed:

1. Select function/option 04/03, Property Custodians by Organization.
2. Press ENTER.

RESULT: The system displays the Property Custodians by Organization screen. See Figure 8-8.

```
PROGRAM: PM0463P  PROPERTY MANAGEMENT SYSTEM  DATE: 11/21/05
PROPERTY CUSTOMDANS BY ORGANIZATION  TIME: 14:20:46
FUNCTION/OPTION: 04 / 03

TYPE REQUIRED INFORMATION BELOW; PRESS 'ENTER' WHEN COMPLETE.

JOB NAME: CT5515J - PROPERTY CUSTOMDANS BY ORGANIZATION

(REQUIRED)
LIST ALL CUSTOMDANS WITHIN CENTER:  [ ]
LIST ONLY CUSTOMDANS WITHIN ORGANIZATION:  [ ]

Enter-PF1-----PF2-----PF3-----PF4-----PF5-----PF6-----PF7-----PF8-----PF9-----PF10-----PF11-----PF12-----
HELP  EHELP  PREV  CFRM  CNCL  EXIT
```

Figure 8-8 Property Custodians by Organization Screen
8.6 Property Custodians by Organization (continued)

1. Does the user wish to restrict the list to custodians in a specific center or organization?
   a. If yes, to request a list of custodians in a specific center, type the Center Code following the
      List … Center” prompt; press ENTER.
   b. If yes, to request a list of custodians in a specific organization, TAB to the “List …
      Organization” prompt on the next line, type in the Organization Code; press ENTER.

   NOTE: If the user does not type a specific center or department code in the optional data entry
   area, the system will generate an error message.

   RESULT: The system displays a pop-up window requesting such output control information as
   logon password, bin number, number of copies, and form options. See Figure 8-9.

2. The following PF keys are active on this screen:
   a. PF2 takes the user to element Help on any of the three updatable fields, if the cursor is
      positioned on the field to be queried.
   b. PF3 takes the user to the Property Custodians by Organization screen and ignore any output
      control information that was entered.
8.6 Property Custodians by Organization (continued)

3. Complete all information on the output control information screen and press ENTER. If further instructions are needed, see Table of Fields - Screen 04/01.

RESULT: The system again displays the Property Custodians by Organization screen, including the updated information and a message stating “Press PF9 to submit report requests or ENTER to make changes”.

WARNING: The user’s logon password must be entered correctly on the system or the user will not be permitted to submit a report request. The system does not check the user’s password until a report request is submitted. At that time, if the user typed an incorrect password, the system will provide an error message. The user has only three attempts to correct a password. After three incorrect passwords, the logon ID will be suspended.

4. Does the user wish to view and/or change any of the information that has been entered before submitting the report request?
   a. If yes, press ENTER and then repeat the above steps as necessary.
   b. If no, press PF9 to send the report request.

RESULT: The system displays a verification message at the top of the Property Custodians by Organization screen confirming both the job and bin number.

5. Perform one of the following:
   a. To return to the Online Report Selection Menu, BACKTAB to the Function/Option field at the top of the screen, type 0400, and press ENTER, or press HOME, type 0400 and press ENTER.
   b. To return to the Property Management Main Menu, BACKTAB to the Function/Option field at the top of the screen, type 0000 (four zeros) and press ENTER or press HOME, type 0000 and press ENTER.
   c. To exit the system, press PF12.
8.7 Building Code/Name Cross-Ref List

Overview

This screen enables authorized operators to request a Building Code/Name Cross-Reference List report. This report lists the 4 character building code and the building name for all locations used in the Property Management System.

On the Building Code/Name Cross-Ref List Screen, the only data entry area is the Report Sort Option field. This field allows the operator to request the report sorted according to Building Code or Building Name. The user may request both sorting options from this screen.

Sorting Options

The user must select one of the three sorting options listed below the Report Sort Option field.

Output Control Information

When the user is ready to submit the report request, press ENTER, and the pop-up output control information screen will appear. If the user has already entered their logon password in a previous output control information screen, the system will not ask the user for the password a second time. The system will also retain the same bin number previously typed in. Before a report request is submitted, the user may change the output bin number.

Procedure

To request a building code/building name cross reference when the Online Report Selection Menu is displayed:

1. Select function/option 04/04, Building Code/Name Cross-Ref List.
2. Press ENTER.

RESULT: The system displays the Building Code/Name Cross-Ref List screen. See Figure 8-10.

Figure 8-10 Building Code/Name Cross-Ref List Screen
3. Select a report sorting option by typing 1, 2 or 3 in the Report Sort Option field and press ENTER.

RESULT: The system displays a pop-up window requesting such output control information as logon password, bin number, number of copies, and form options. See Figure 8-11.

Note: The Logon Password field may or may not be present on this screen. If the user has already entered their logon password in a previous output control information screen, the system will not ask the user for the password a second time.

4. The following PF keys are active on this screen:
   - PF2 takes the user to element Help on any of the three updatable fields, if the cursor is positioned on the field to be queried.
   - PF3 takes the user to the Building Code/Name Cross Ref-List screen and ignores any output control information that was entered.

5. Complete all information on the output control information screen and press ENTER, if further instructions are needed, see Table of Fields – Screen 04/01.

RESULT: The system again displays the Building Code/Name Cross-Ref List screen, including the updated information and a message stating “Press PF9 to submit report request or ENTER to make changes”.

WARNING: The user's logon password must be entered correctly or the system will not allow the user to submit a report request. The system does not check the password until a report request has been submitted. At that time if a previously provided password was incorrect, the system will display an error message. The user has three tries to correct the password. After three tries the user's logon ID will be suspended.
8.7 Building Code/Name Cross-Ref List (continued)

6. Does the user wish to view and/or change any of the information that was entered before submitting the request?
   a. If yes, press ENTER and then repeat the above steps as necessary.
   b. If no, press PF9 to send the report request.

RESULT: The system displays a verification message at the top of the Building Code/Name Cross-Ref List screen confirming both the job and the bin number.

7. Perform one of the following:
   a. To return to the Online Report Selection Menu, BACKTAB to the Function/Option field at the top of the screen, type 0400, and press ENTER, or press HOME, type 0400 and press ENTER.
   b. To return to the Property Management Main Menu, BACKTAB to the Function/Option field at the top of the screen, type 0000 (four zeros) and press ENTER or press HOME, type 0000 and press ENTER.
   c. To exit the system press PF12.
8.8 Category Code Listing

Overview

This screen enables authorized operators to request a report of all property item category codes.

On the Category Code Listing screen, there is no data entry area. When this function is selected, the system automatically takes the user to the pop-up output control information screen.

Output Control Information

When the user is ready to submit the report request, press ENTER, and the pop-up output control information screen will appear. If the user has already entered their logon password in a previous output control information screen, the system will not ask the user for the password a second time. The system will also retain the same bin number previously typed in. Before a report request is submitted, the user may change the output bin number.

Procedure

To request a report of category codes when the Online Report Selection Menu is displayed:

1. Select function/option 04/05, Category Code Listing.
2. Press ENTER.

RESULT: The system displays the Category Code Listing screen and the output control information pop-up window, see Figure 8-12.

Note: The Logon Password field may or may not be present on this screen. If the user has already entered their logon password in a previous output control information screen, the system will not ask the user for the password a second time.

![Figure 8-12 Category Code Listing Screen With the Output Control Information Pop-Up Window Displayed](image-url)
Category Code Listing  8 – 8 (continued)

3. The following PF keys are active on this screen:
   • PF2 takes the user to the element Help on any of the three updatable fields, if the cursor is positioned on the field to be queried.
   • PF3 takes the user to the Category Code Listing screen and ignores any output control information that was entered.

4. Complete all information on the output control information screen and press ENTER. If further instruction is needed, refer to “Table of Fields – Screen 04/01”.

RESULT: The system again displays the Category Code Listing screen, including the updated information and a message stating “Press PF9 to submit report request or ENTER to make changes”.

WARNING: The user’s logon password must be entered correctly or the system will not allow the user to submit a report request. The system does not check the password until a report request has been submitted. At that time if a previously provided password was incorrect, the system will display an error message. The user has three tries to correct the password. After three tries the user’s logon ID will be suspended.

5. Does the user wish to view and/or change any of the information that was entered before submitting the report request?
   a. If yes, press ENTER and then repeat the above steps as necessary.
   b. If no, press PF9 to send the report request

RESULT: The system displays a verification message at the top of the Category Code Listing screen confirming both the job and the bin number.

6. Perform one of the following:
   a. To return to the Online Report Selection Menu, BACKTAB to the Function/Option field at the top of the screen, type 0400, and press ENTER, or press HOME, type 0400 and press ENTER.
   b. To return to the Property Management Main Menu, BACKTAB to the Function/Option field at the top of the screen, type 0000 (four zeros) and press ENTER or press HOME, type 0000 and press ENTER.
   c. To exit the system press PF12.
Chapter 9 Ongoing Property Maintenance

9.1 Changes in Property Administrator

In order to ensure that stewardship responsibility related to the capitalized assets within an organization is fulfilled, a Property Administrator must be assigned oversight responsibility for those assets. As employees move from one organization to another or leave the University entirely, a new Property Administrator must be assigned to continue this stewardship role.

The initial set up and change of a Property Administrator within an ORG Code may only be completed by members of the Property Management Group. Departments are required to send an email or memo to a member of the Property Management Group with any Property Administrator changes.

The social security number of the Property Administrator is used to retrieve the name from the UMIS Payroll system. If a Department notifies the Property Management Group with a name only, that individual must be an active employee on the payroll system and by name the Property Management Group personnel will be able to retrieve the social security number and complete the change in Property Administrator in the UMIS Property Management system.

9.2 Changes in Custodian and Tagging Contact

When a new asset is to be acquired, the Departments will prepare a purchase order. As part of the purchase order process, the Custodian and Tagging Contact names are provided. There is significant importance with each position. The custodian is the individual that takes responsibility for the asset. In most cases this will be the individual that utilizes the equipment. The tagging contact will be the individual that the Property Management Group will send the bar code tag for the Tagging Contact to affix to the asset.

Custodian

Assets are generally in use at the University for years while personnel can change positions or leave the employment of the University altogether during an asset's life time. The Custodian of an asset is initially set up when the member of the department creates a purchase order for an asset in BEN Buys. The Property Management Group accesses this same information and enters the name of the Custodian in the Property Management System when the new asset is created. Changes to the Custodian which occur after this initial input should be performed by the departmental Property Administrator. In the Property Administrator’s absence, the Property Management Group has the ability to change custodians in the system.

System Updates

- The Property Administrator changes the Custodian in the Property Management System via function/option 03/04
- From 03/04, enter the Item ID# or Tag #; press ENTER. The information for that asset will appear.
- From anywhere on this screen, press F6 (CSRCH) to access the list of employees.
- Enter the first few letters of the employee's last name and press ENTER.
- Once the desired name is listed, TAB to the appropriate employee name and type ’S’; press ENTER.
9.2 Changes in Custodian and Tagging Contact (continued)

Tagging Contact

The Tagging Contact is initially set up when the member of the Department creates a purchase order in BEN Buys. The Property Management Group accesses this information and enters the name of the Tagging Contact when the new asset is created in the Property Management System. Changes to this field can only be accomplished by the Property Management Group. Changes to the Tagging Contact which occur after initial input should be performed by the departmental Property Administrator. In the Property Administrator’s absence, the Property Management Group has the ability to change custodians in the system.

System Updates

- The Property Administrator changes the Custodian in the Property Management System via function/option 03/04
- From 03/04, enter the Item ID# or Tag #; press ENTER. The information for that asset will appear.
- From anywhere on this screen, press F5 (TSRCH) to access the list of employees.
- Enter the first few letters of the employee’s last name and press ENTER.
- Once the desired name is listed, TAB to the appropriate employee name and type ‘S’; press ENTER.
- TAB also to the Tagging Contact phone number. Type in the phone number of the new tagging contact.
Flow Chart for Changes in Property Administrator, Custodian and/ or Tagging Contact

**Change in Property Administrator**
- Department Notifies Property Management Group (PMG) via E-mail of Change in Property Administrator
- PMG Updates New Property Administrator in Property Management System
- Change in Property Administrator Complete

**Change in Custodian**
- Department Enters Item #
- Press F6 CUSRCH to Search by Name
- Type ‘S’ Next to New Custodian Name
- Change in Custodian Complete

**Change in Tagging Contact**
- Department Enters Item #
- Press F5 TUSRCH to Search by Name
- Type ‘S’ Next to New Tagging Contact Name
- Tab to Tagging Contact Phone Number to Update w/New Number
- Change in Tagging Contact Complete

**Figure 9.1 Change in Property Administrator, Custodian and/ or Tagging Contact**
9.4 Movement of Equipment

In order to ensure that the financial statements of the University accurately reflect the financial condition of the University, it is important that capitalized assets are properly recorded on the general ledger. There are financial audits that occur periodically by the University's independent auditors as well as A-21 and A-110 federal compliance audits. An integral part of any audit is fixed assets and depreciation. In order to properly prepare for this process, a representative of the Property Management Group may perform a physical inventory in order to compare assets listed in the Property Management System against the actual physically identified assets. To facilitate this process, it is important that the departmental Property Administrator take the appropriate action as described below to track asset movement.

Movement of equipment is broken down into four possibilities:

- Change in location within the same building and ORG Code
- Change in location to a different building
- Change in School/Center i.e. CNAC or ORG Code
- Home use

**Change in Location - Same Building and ORG Code**

If an asset is moved within the same building within the same ORG, this process is typically initiated by the Custodian and/or the Tagging Contact. The departmental Property Administrator has the ability to make these changes in the Property Management System. For all changes, the Property Administrator will be required to prepare the **Equipment Change Form** as follows:

- Record the item ID# and/or Tag # which is obtained from the Property Management System.
- Enter the current location from the Property Management System including building name and number, floor and room.
- Enter the new location, building, floor and room.
- The departmental Property Administrator should sign off on the form.
- The Property Administrator should maintain this document in a file with all equipment movements.

**System Updates**

- The information provided on the Equipment Change Form must be entered into the Property Management System by the Property Administrator via function/option 03/05.
- From 03/05, enter the item ID# or tag #; press ENTER. The information for that asset will appear.
- From anywhere on this screen, press F6 to access the list of Floors and Rooms for this Building.
- Once the desired floor and corresponding room numbers have been retrieved, Tab to the appropriate room and Type an ‘S’; press ENTER.

**Change in Location - Different Building and/or School/Center (CNAC) or ORG Code**

If an asset is moved from one building to another and/or from one CNAC or ORG to another, this process is typically initiated by the Custodian and/or the Tagging Contact. The departmental Property Administrator DOES NOT have the ability to make changes in building, CNAC or ORG in the Property Management System. For all changes, the Property Administrator will be required to prepare the **Equipment Change Form** as follows:
9.4 Movement of Equipment (continued)

- Record the item ID# and/or Tag # which is obtained from the Property Management System.
- The original Property Administrator must enter the current location from the Property Management System including building name and number, floor and room.
- The new Property Administrator must enter the new location, building, floor and room.
- Both departmental Property Administrators should sign off on the form.
  - Note: if the original and receiving Property Administrator is the same, only one signature is required. Indicate ‘same’ for the receiving Property Administrator.
- Both Property Administrators should maintain this document in a file with all equipment movements.
- **For CNAC Changes Only** - both Senior Business Administrators must sign off on the form.
- The completed Equipment Change Form should be forwarded to the Property Management Group.

**System Updates**

- The information provided on the Equipment Change form must be entered into the Property Management System by the Property Management Group.
- **For CNAC Changes Only** - The Property Management group will also prepare a journal entry into BEN Financials to move the acquisition cost and the accumulated depreciation of the asset to the new location/CNAC.

**Home Use Statement**

There will be times when it is beneficial for the University and the employee to take an asset home to use rather than using it at the University. In this situation, it is important the asset is reflected in the system at its proper location. This is accomplished through the preparation and processing of a Home Use Statement as follows:

- Enter the name and home address of who will be using the asset and where the equipment will be located.
- Record the item ID# and/or Tag # which is obtained from the Property Management System.
- The Department Chair, Director or Senior Business Administrator must indicate on the form whether or not the organization will assume the $500 deductible liability in the event the equipment is lost, stolen or damaged.
- The employee using the equipment at home must sign off on the form. When the University does not assume the $500 deductible liability, by signing the form, the employee indicates he/she will assume the $500 deductible liability.
- The employee’s Department representative and Property Administrator should maintain a copy in their files.
- The completed Home Use Statement Form should be forwarded to the Property Management Group.

**System Updates**

- The information provided on the Home Use Statement Form must be entered into the Property Management System by the Property Management Group.
- Please note: When/if the asset is returned to a University location, the Property Administrator should put the new location in the bottom section of his/her copy of the original Home Use Statement and sign it acknowledging receipt of the asset.
- A copy of the signed form should be given to the employee and a copy kept for the Property Administrator’s files. A copy with the original return signature should be sent to the Property Management Group to update the location in the Property Management System.
Property Management

Movement of Equipment

Move Equipment Within the Same Building

Property Administrator (PA) Completes Equipment Change Form

PA Updates Property Management System

PA Maintains Original for Files

Move Equipment Complete

Move Equipment to Another Building

Property Administrator (PA) Completes Equipment Change Form

PA Maintains Copy for Files

PA Forwards Original to Property Management Group (PMG)

PMG Updates Property Management System

Move Equipment Complete

Figure 9.4 Movement of Equipment Within Building or to Another Building
Figure 9.5 Movement of Equipment to Another ORG or Another CNAC
Figure 9.5 Movement of Equipment to Another ORG or Another CNAC
9.5 Disposition of Equipment

The Office of the Comptroller is responsible for accounting for all University assets. In order for the Comptroller’s Office to produce accurate financial statements it is required that they be notified of any changes in the ownership of capitalized assets according to the guidelines stated below. It is the responsibility of the Property Administrators or Business Administrators in the Property Administrator's absence to follow these procedures to appropriately and accurately account for any changes in capitalized assets in a timely manner. The Custodian and/or Tagging Contact should initiate the process of reporting disposition of equipment to their departmental Property Administrator.

In the case of externally funded assets, the Office of Research Services (ORS) must follow the guidelines described in OMB Circular A-110 for equipment financed by federally funded grants or similar guidelines of any other organization that externally funded the acquisition of equipment. Paperwork regarding disposition of externally funded assets must be sent to ORS for approval to ensure compliance with sponsor requirements before being sent to the Property Management Group.

- On no less than a quarterly basis, all departmental Property Administrators or their representatives should produce a listing of assets from the Property Management System. This list should be reviewed against actual assets in use. Any changes in disposition should be forwarded to the PMG as soon as possible by completing the Notification of Disposition of Equipment Form as follows:
  - Indicate the name of the Property Administrator for the item being disposed at the top of the form
  - Record the item ID# and/or Tag # which is obtained from the Property Management System
  - Provide the description, serial number, acquisition date and cost, the fund number and if 5 fund, the sponsor, and the reason for and date of disposal - for example: junked, donated, exchanged/traded in, lost, mistake, transferred out, returned or sold (For sale of equipment, see additional steps below)
  - The Business Administrator, Department Chair or Director as well as the Senior Business Administrator should sign off on the form
    - If the acquisition cost was over $50,000, the Associate Treasurer must sign off on the form
    - If the acquisition cost was over $250,000, the VP of Finance and Treasurer must sign off on the form
  - If the assets were originally externally funded, ORS must sign off on the form. See discussion below
  - The completed Notification of Disposition of Equipment Form should be forwarded to the Property Management Group

System Updates

- The information provided on the Notification of Disposition of Equipment Form must be entered into the Property Management System by the Property Management Group
- The Property Management Group will also prepare the appropriate journal entry removing the assets and related accumulated depreciation from BEN Financials
9.5 Disposition of Equipment

Sale of Assets

- If the asset is to be sold, the Property Administrator should contact the PMG to determine the appropriate book value
  - The Property Administrator should also search websites such as e-bay or other used equipment valuation sources (e.g. Kelly Bluebook values for vehicles) to determine a reasonable selling price
  - If the asset was originally externally funded the Property Administrator should contact ORS regarding what to do with proceeds from the sale of such equipment

- The department will transact the sale and deposits the proceeds into object code 5602 Gain/Loss on Sale of Asset
  - If sales tax is to be collected, the sales tax amount is to be deposited into object code 2111. Please note: Sales tax should be collected on all asset sales, except where the buyer provides a copy of their tax exempt certificate.
  - Please note: Pending ORS outcome proceeds may need to go to the Sponsor

- The department should then send both the completed Notification of Disposition of Equipment Form and the copy of the deposit to the Property Management Group

Externally Funded Assets

- As stated above, the preparer of the Notification of Disposition of Equipment must be sure to include the fund number and sponsor of the asset. Once completed, the form must be forwarded to the appropriate Office of Research Services (ORS) Accountant since it is an externally funded asset. Below is the web page where you can locate the appropriate ORS contact:
  - [http://www.upenn.edu/researchservices/](http://www.upenn.edu/researchservices/)

- The ORS Accountant will review the sponsors terms and conditions regarding equipment to determine the disposition requirements and record their findings on the Notification of Disposition of Equipment Form and return the form to the departmental Property Administrator.

- Continue with steps shown above
Property Management

Disposition of Equipment
Internally Funded Assets

Department Identifies Asset to be Disposed

Sale?

Yes

Department Contacts PMG Determines Book Value of Asset from Property Management System (PMS)

Department Transacts Sale

Department Deposits Proceeds of Sale Credit 5992 Gain/Loss on Sale of Asset

*If Applicable, Department Collects Sales Tax (Object Code 2111)

Department Completes Equipment Disposition Form - Attaches Copy of Deposit - Sends to (PMG)

PMG Retires the Asset from PMS and Removes the Asset from GL

Disposition Complete

No

Department Completes Equipment Disposition Form - Sends to Property Management Group (PMG)

Department Disposes Asset

This process includes funding from the General Unrestricted, Endowments and/or Gifts Funds (0, 4, and/or 6 Funds)

Figure 9.6 Disposition of Equipment for Internally Funded Assets
Figure 9.6 Disposition of Equipment for Externally Funded Assets
# Revision History

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