

QRG for Acquisition of Equipment (a.k.a. Asset Requisitions)

Let's say you want to order a **freezer**. We'd start by searching for the freezer in the **Penn Marketplace**.

- Click on **[Return to BEN Buys Shopping Cart]**
- Click on **[Checkout]**
- Click on **[Edit Lines]** ; Click on **Account** tab
- Enter the **Charge Account**

Requisition Information: Edit Lines

* Indicates required field

Check Funds Continue

Delivery Accounts Attachments

Select Lines: Copy Delete

Select All | Select None

Select Line	Description	Charge Account	Split
<input type="checkbox"/> 1	Freezer Upright Model ULT 1786-9A 17.2 CF -50 to -86 Deg C Revco,	020-0103-1-000000-1872-4401-0000	

TIP Click on a Split icon to allocate costs to multiple accounts.

- When entering the account number for an asset, the **default object code** must be change to one of the following:
 - **1870** Furniture and Fixtures
 - *e.g. a custom table*
 - **1871** Computer Equipment
 - *e.g. a server*
 - **1872** Other Capitalized Equipment
 - *e.g. research equipment*
 - **1874** Collectibles
 - **1877** Equipment in Process
- Click on the **Attachment** tab
- Select **'Miscellaneous'** and add a note to the Purchasing Services regarding bid info
 - ☞ *The note to Purchasing Services is required for all requisitions over \$5,000*
- Click on **[Submit]**



For Non-Marketplace Requisitions

The 'Description' must be a full English language description, including the Manufacturer name and the Model number, if applicable

☞ *Do not type only a Quote # in the description – use the Note to Supplier to add this information*

Property Management (a.k.a. Asset Requisitions) (continued)

The Property Management Information screen appears. The fields must be completed as outlined below:

The screenshot shows a web-based form for entering property management information. The form is titled "Enter Property Management information" and has a horizontal layout. It contains several rows of data with various input fields. The fields are numbered 1 through 11, corresponding to the list of instructions below. The form includes tabs for "Shop", "Requisitions", and "Receiving".

1. * Indicates required field

2. BLDG-FLR-RM

3. Category Code

4. Responsible Organization

5. Govt. Retain Title?

6. Custodian of Item

7. Custodian Telephone

8. Tagging Contact

9. Tagging Telephone

10. Component Primary Asset Number

11. Primary Asset Number

This page has a horizontal layout. Scroll to the right to enter the required information.

- Description** – defaults from the Penn Marketplace
- BLDG-FLR-RM** – this is where the asset is being placed for use. Select the Bldg/Floor/Room from the drop down box
The Building, Floor and Room information here 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/>
- Category Code** – type in the first few letters of the word 'MOVEABLE'. From the search results select the most accurate category for the asset being purchased.
The category field drives the appropriate depreciation method, i.e. the number of years the item will be depreciated. If the wrong category is selected the wrong depreciation amount will be expensed.
- Responsible Organization** –type or select the appropriate responsible organization for the asset.
- Govt. Retain Title?** – for Sponsored Programs, the government may retain title. If yes, check the box, if not, leave blank.
- Custodian of Item** – select 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 Penn.
- Custodian Telephone** – enter the phone number for the Custodian
- Tagging Contact** – select the name of the person who is to receive the asset tag(s) from their Senior BA/Asset Administrator.
Tagging Contacts must be employees of Penn
- Tagging Telephone** - enter the phone number for the Tagging Contact
- Component of Existing Asset?** – check this box if the purchase is component of an already existing asset. Otherwise leave blank.
- Primary Asset Number** – when the box to 'Component of Existing Asset?' is checked the Buyer must enter the Asset Number of which the item being purchased is a component in this field. The Primary Asset Number will be validated against existing assets in BEN Assets.
Contact the Property Management Group to obtain a Primary Asset Number
property@exchange.upenn.edu

- Click on **[Apply]** to complete the Requisition process