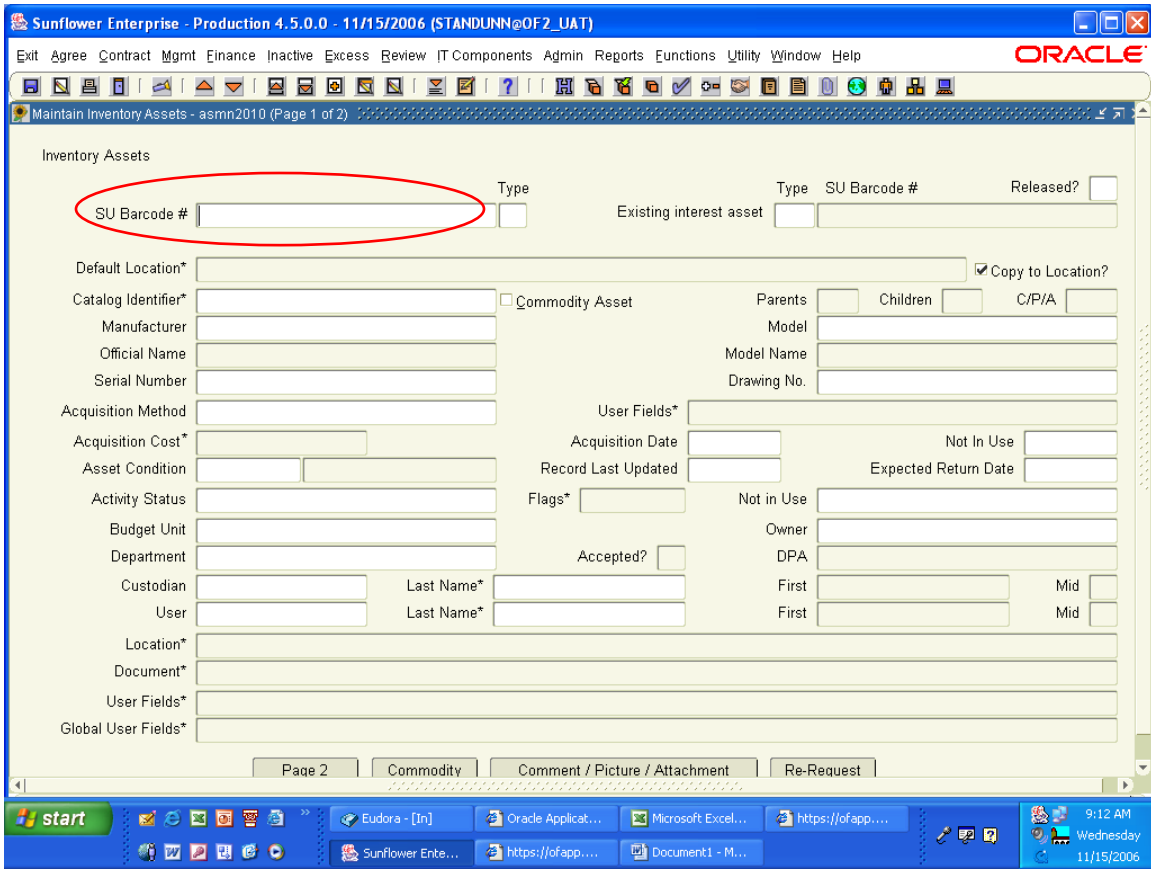


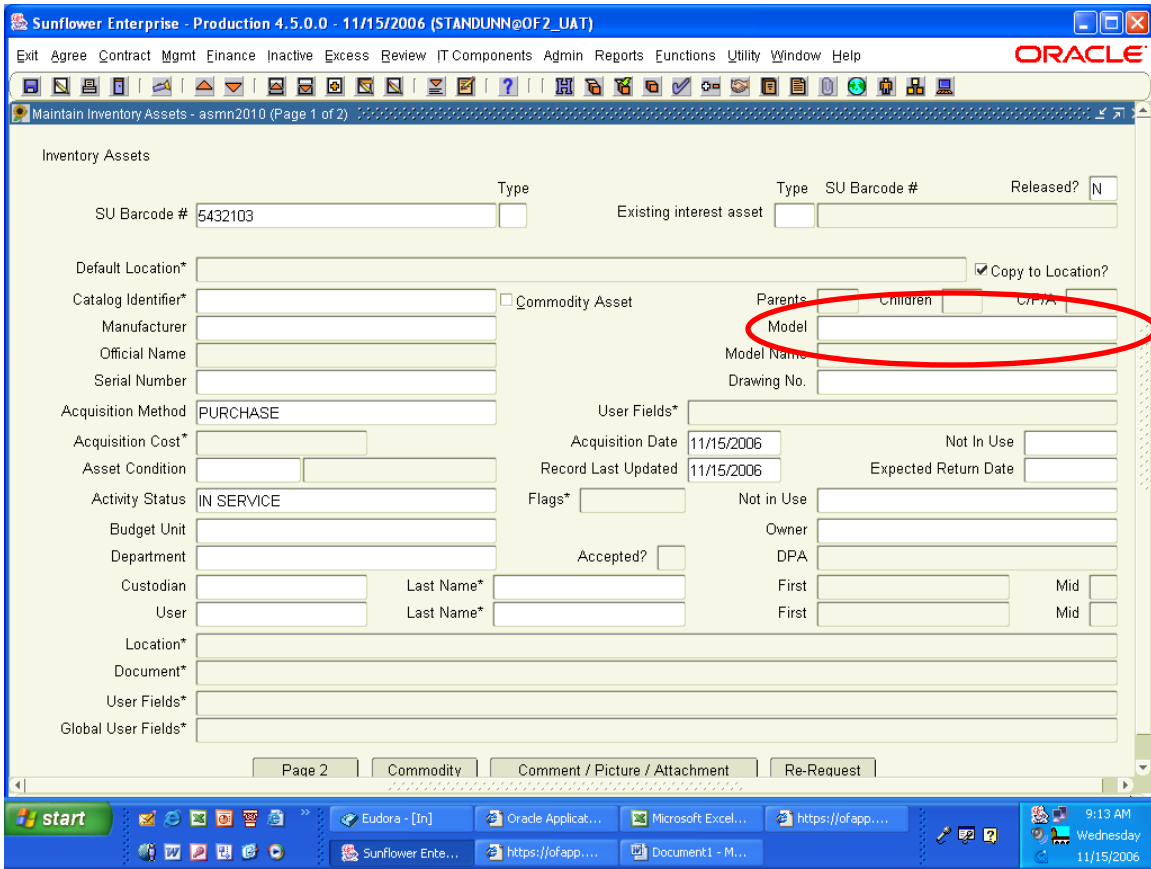
To create a record from scratch use the Maintain Inventory Assets from the Mgmt pull-down menu.

Note: If the PO information exists in the PO interface, please create the record in that module, in order to correctly capture the financial data that flows into Sunflower from the Oracle financial systems.

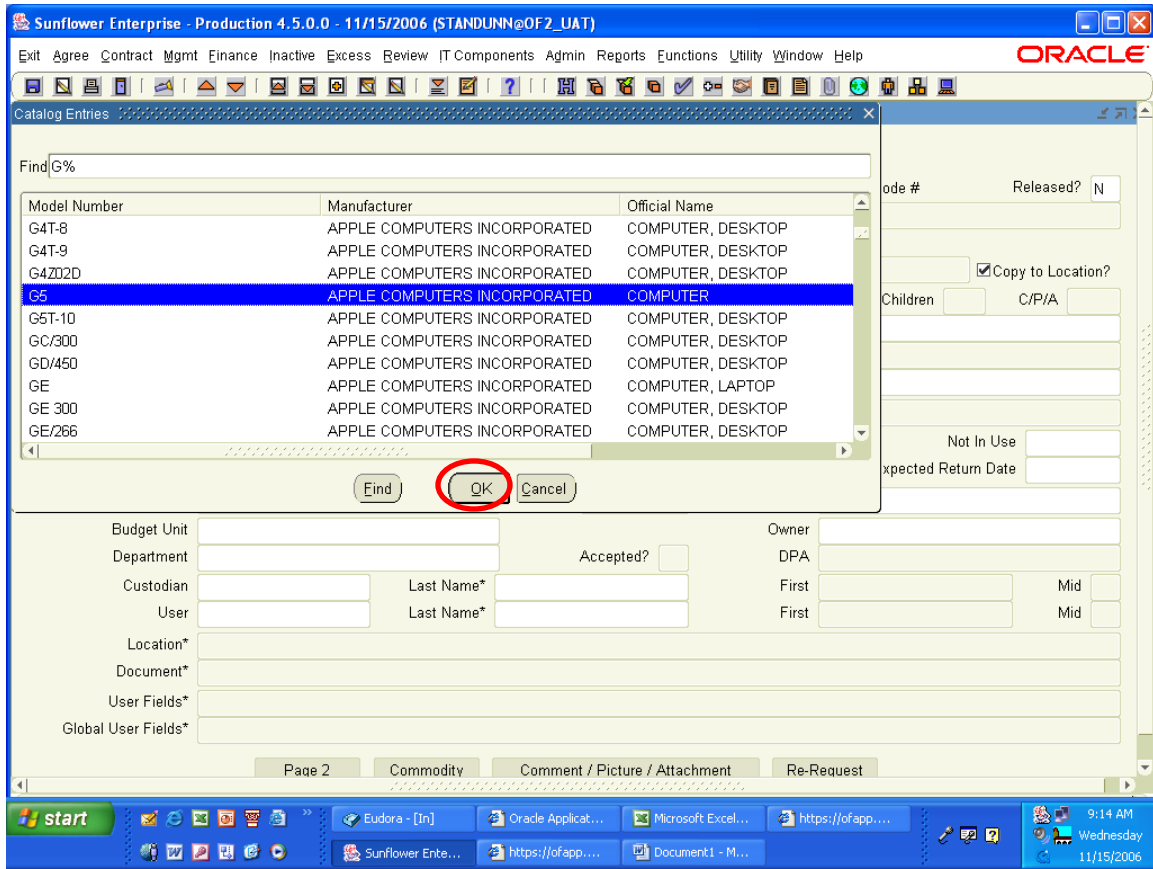


The screen that appears is also the screen you normally see for maintaining records, but all fields are blank.

Enter the SU Barcode tag number in the first field (SU Barcode #), then hit enter or tab.

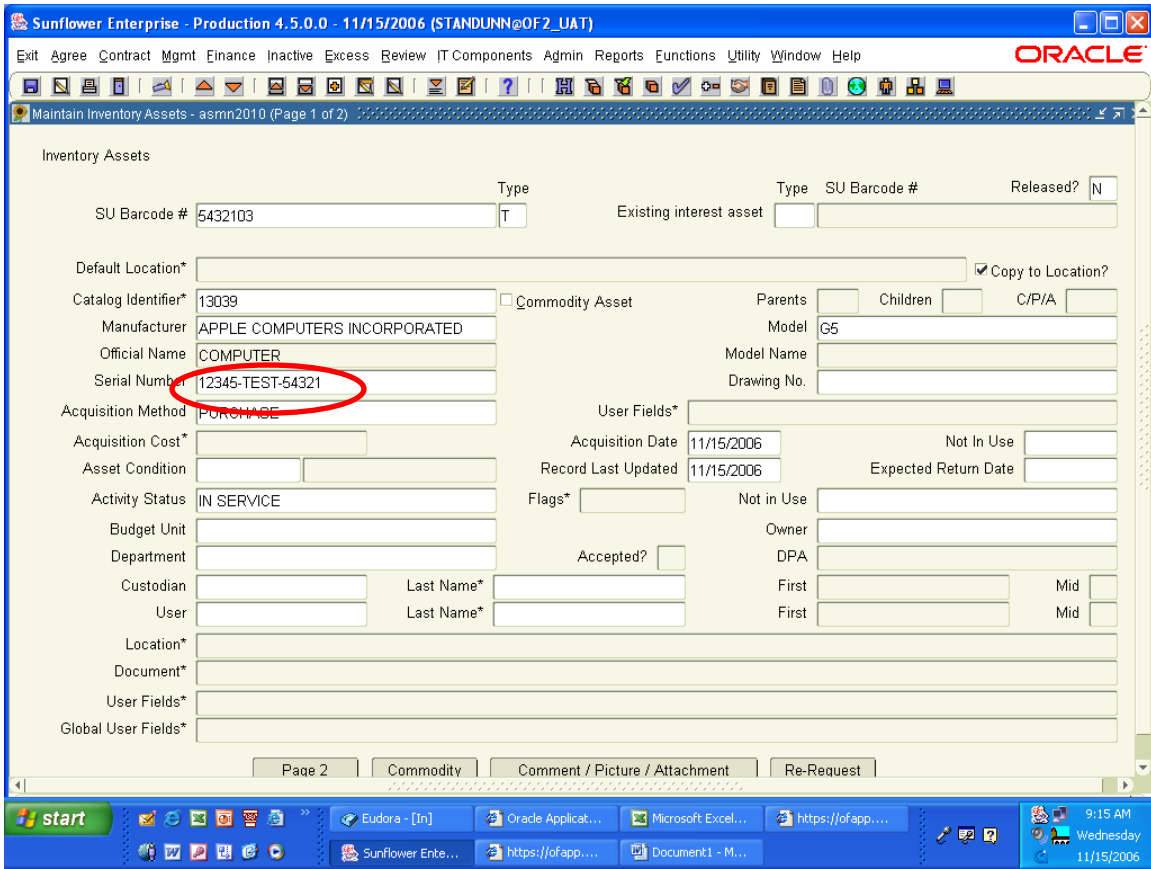


The Acquisition Method and the Activity Status automatically default to Purchase and In Use – these can be changed to other values as needed when you get to them. The “existing interest asset” fields are not used, nor is default location, so skip those and place the cursor directly in the field for Model.



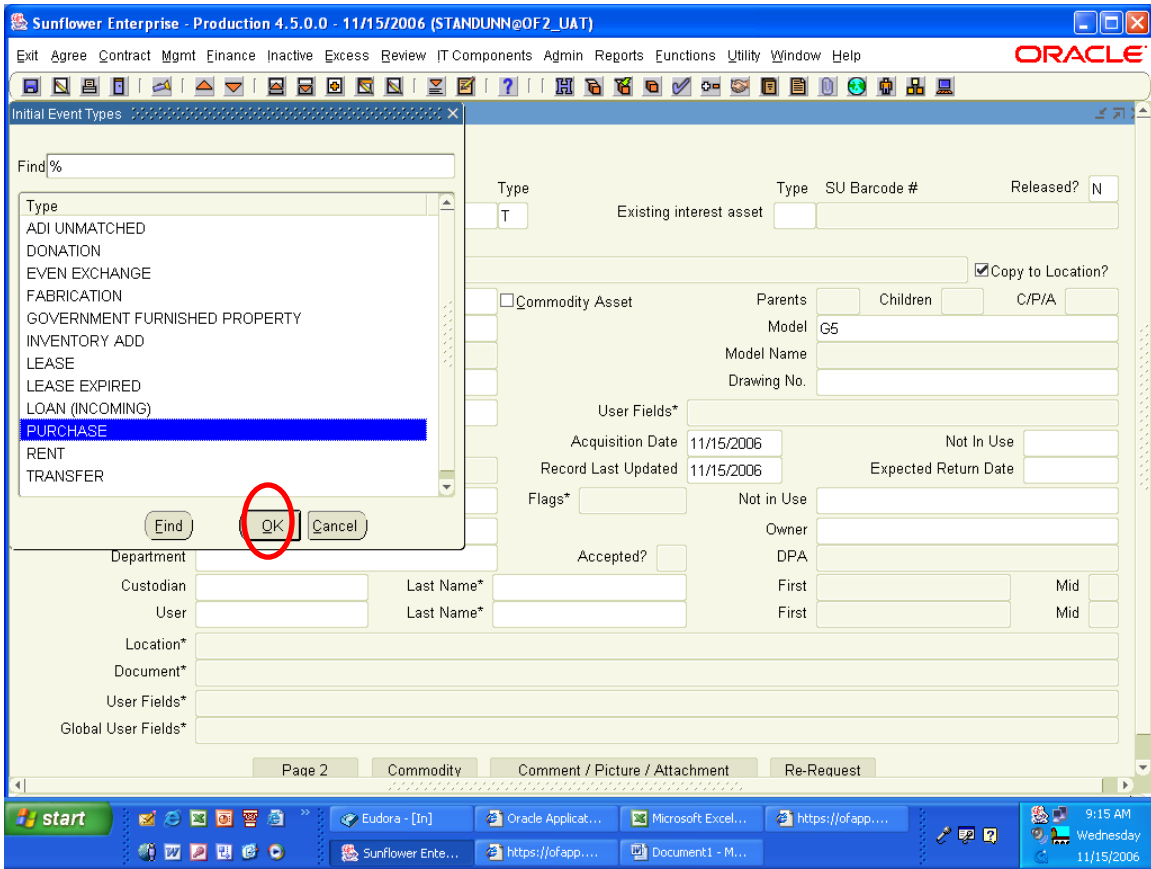
Enter the first few characters of the model number and then double-click on the field. The list of all catalog combinations that have model numbers beginning with those characters will appear. This list is arranged in alphabetical order by Manufacturer. Scroll through the list until you find the correct combination. Highlight that and click the OK button.

Note: if you do not see the combination you need, please contact your PSR and request a new catalog entry.

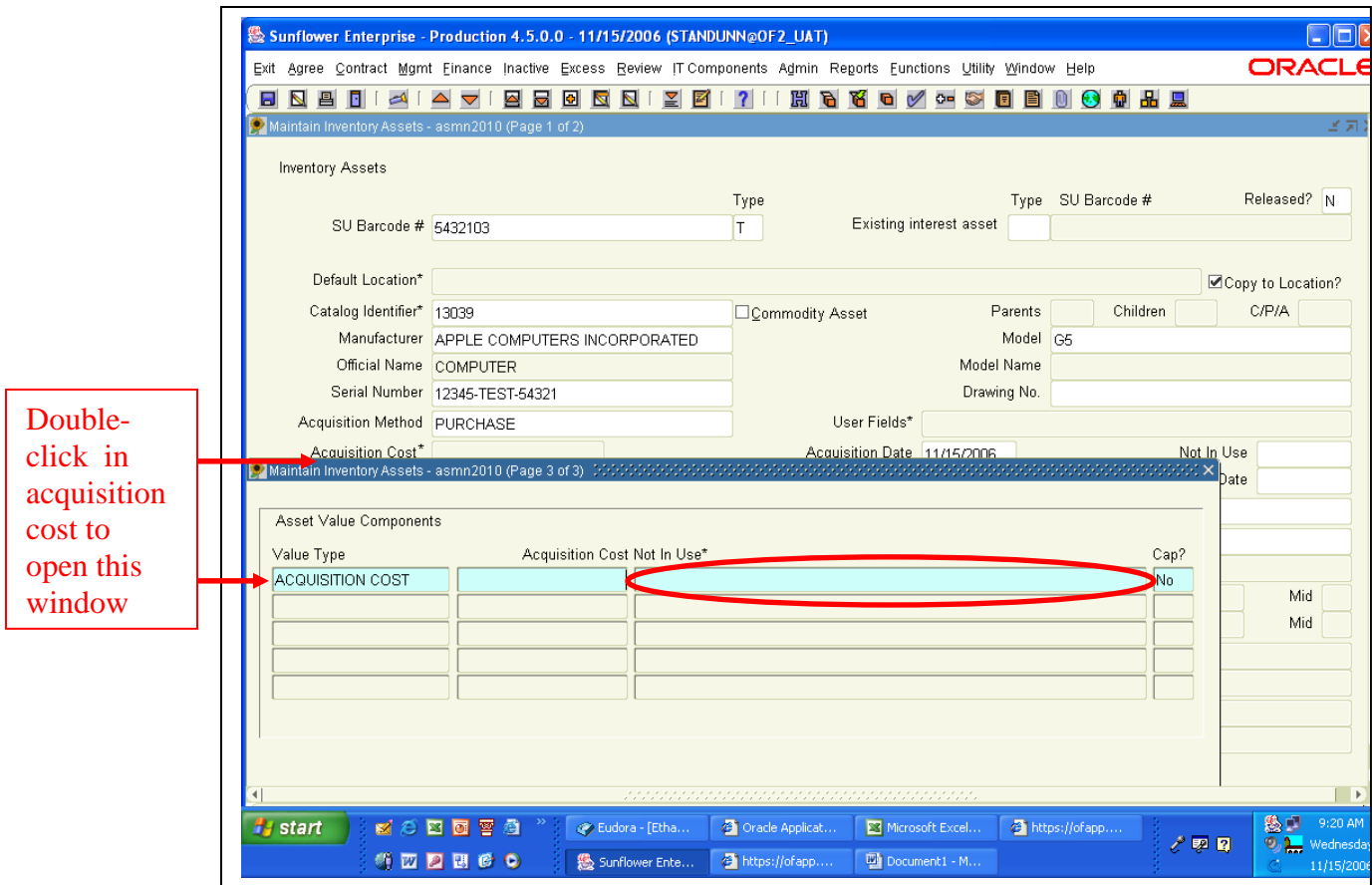


After you've selected the model combination, enter the serial number for the asset. If there is no serial number, leave the field blank.

Note: Serial number is one the most useful pieces of information you can enter for an asset, so always ensure you record the serial number whenever possible.



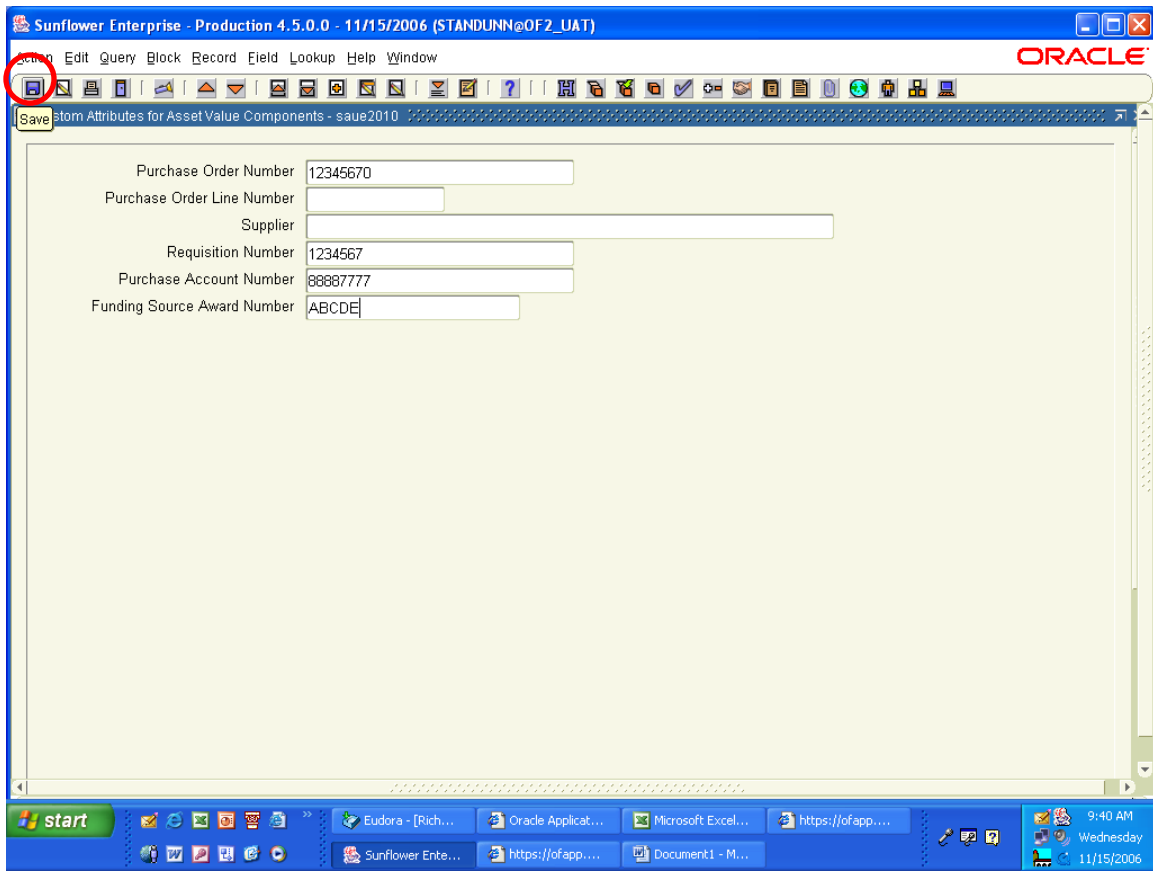
Acquisition method, as noted earlier, defaults to Purchase. If that needs to be changed, double-click on the field for acquisition method to obtain the list of values. Select the appropriate choice and click the OK button.



Next, double-click in the acquisition cost field to open a sub-window. Here you will enter the cost and purchasing information for the item.

Note: If this is a capital asset, it is important that the correct purchase information be entered here for reconciliation by the Property Management Office.

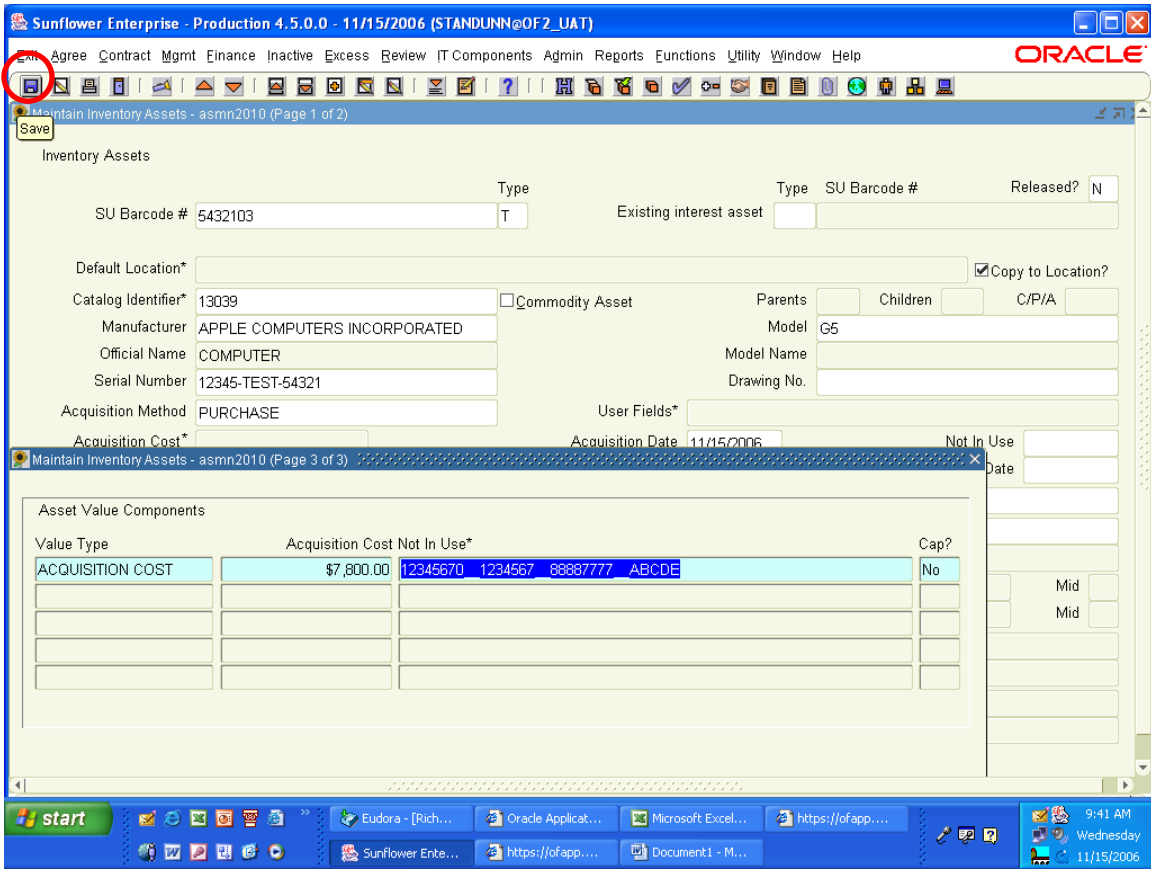
Enter the cost (including tax and freight) and then double-click on the Purchase Information field. This will open a window for entering purchase order information.



In this window, enter the PO number. There are also fields to record the purchase account number (project and task) and funding source award number.

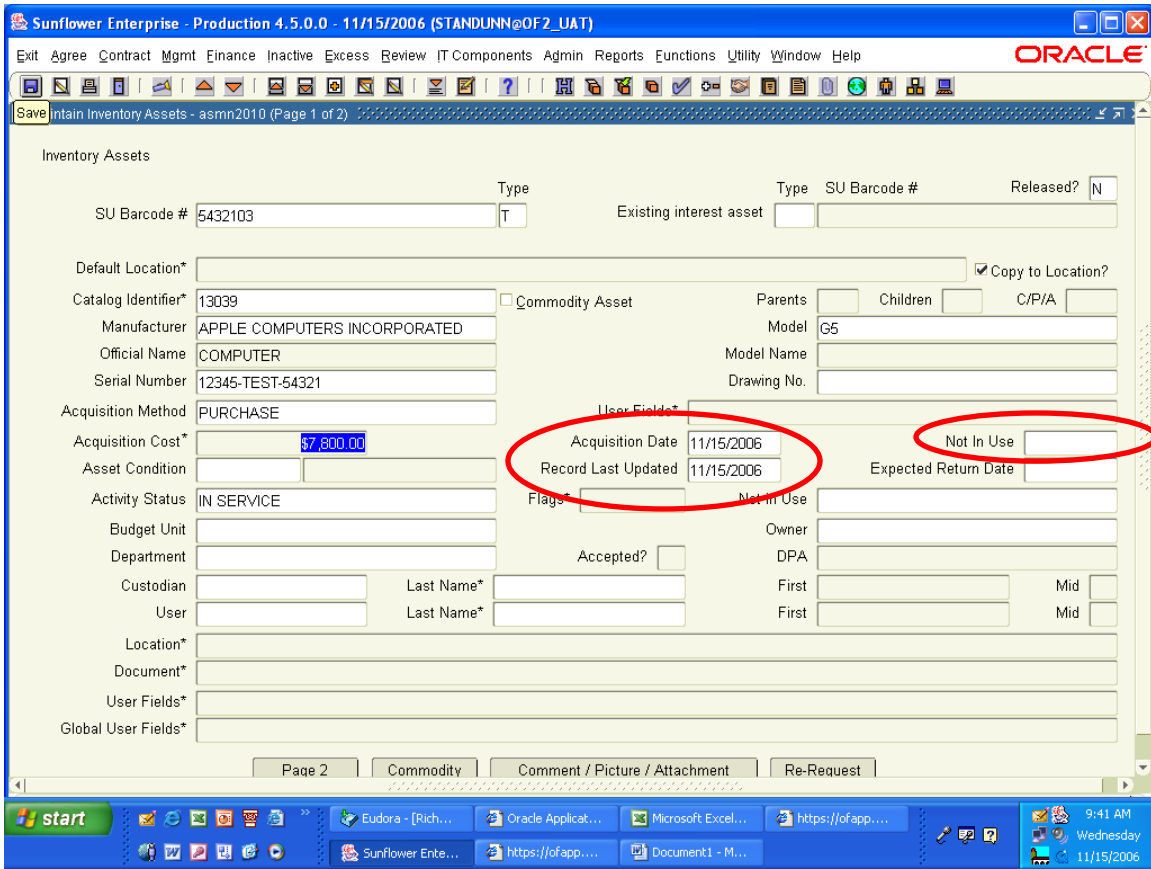
Even if the record is non-capital, or for departmental use only, it's a good idea to at least enter the PO number in the record. Much information can be found on the PO.

After entering the data in the various fields, click on the SAVE icon.



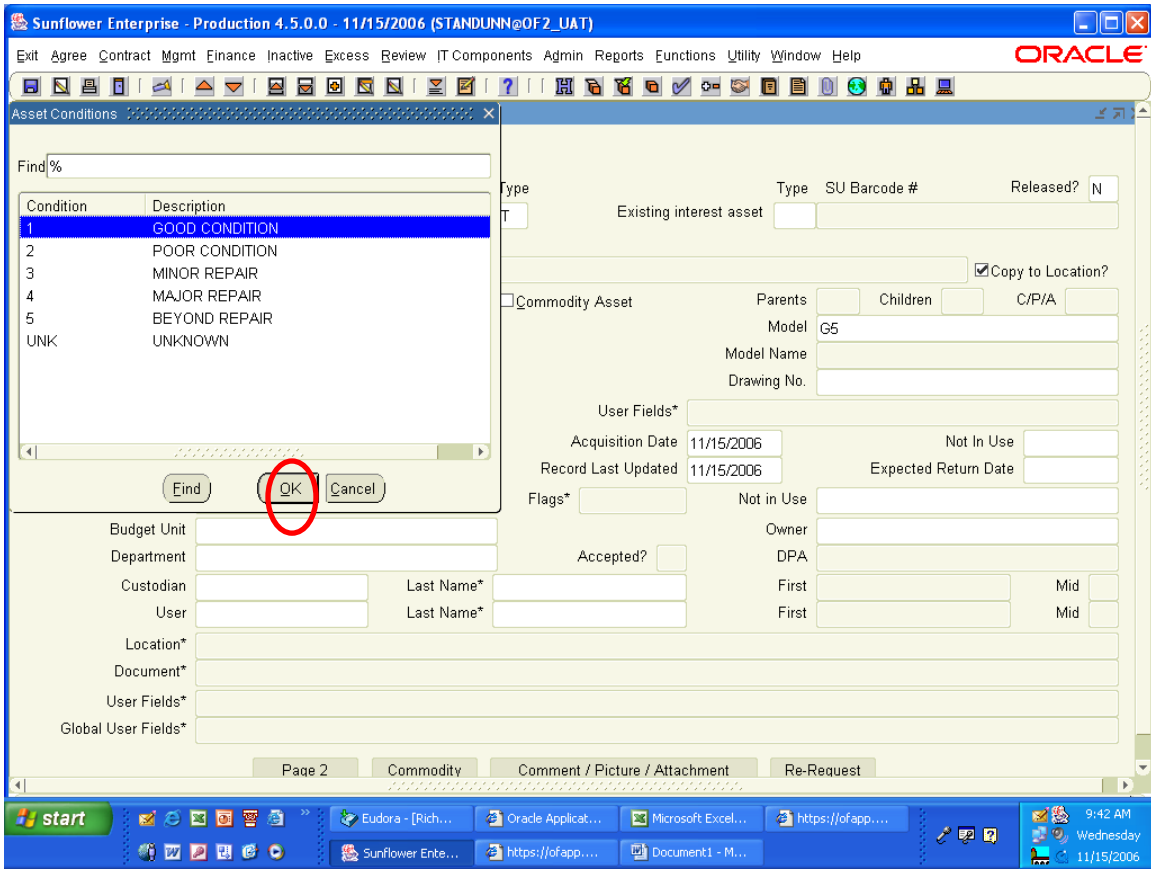
When you save the submenu for PO information, the data becomes a string in the Cost window. The “Cap?” box defaults to no – just ignore it, we don’t use the Sunflower financial module.

Now click on the SAVE icon again, to save the entire block of acquisition cost data.

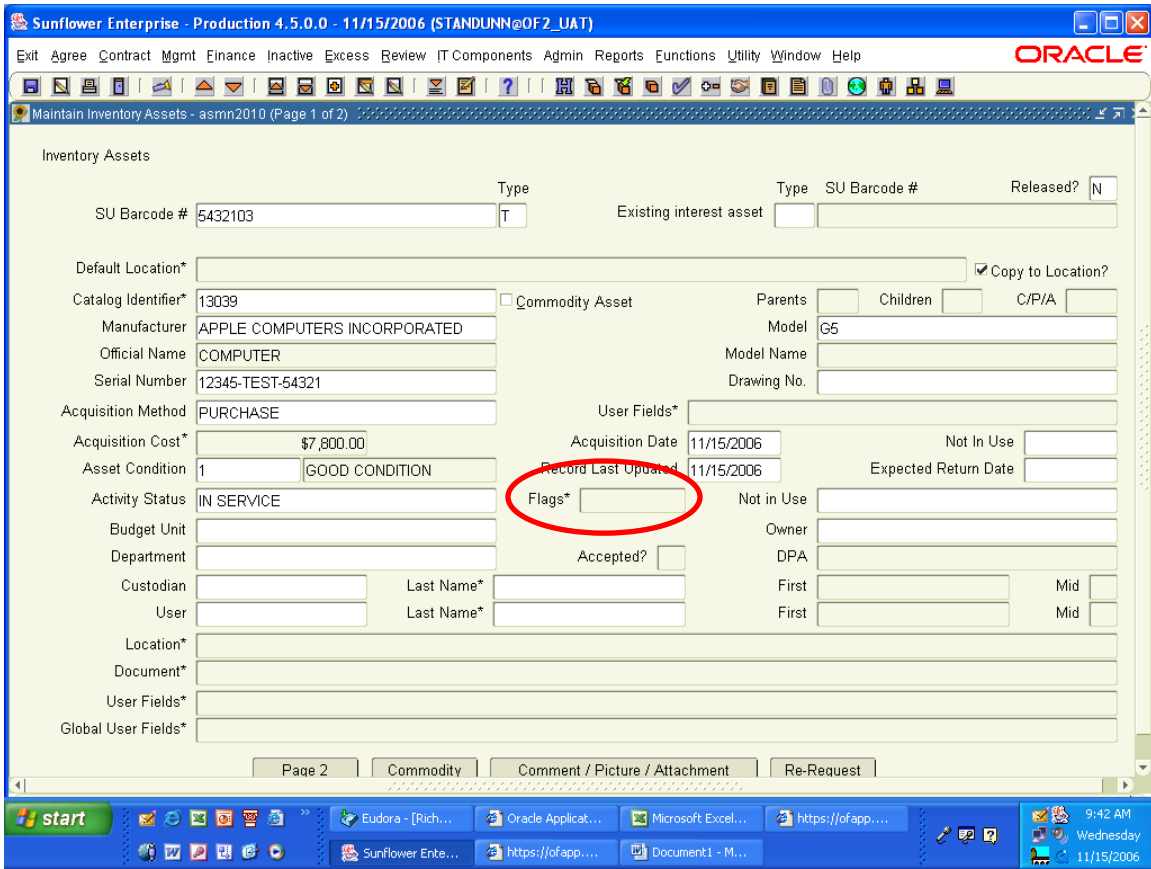


Next is the Acquisition Date – this is the date the item is physically received. If the asset record is for a non-capital item, this can be approximate – otherwise it should be as exact as possible. Ideally, this date should match the receiving date in the purchasing system.

The “Record Last Updated” and “Not in Use” date fields have no benefit or effect for the university, but are required by the application, so let them default to the current date.

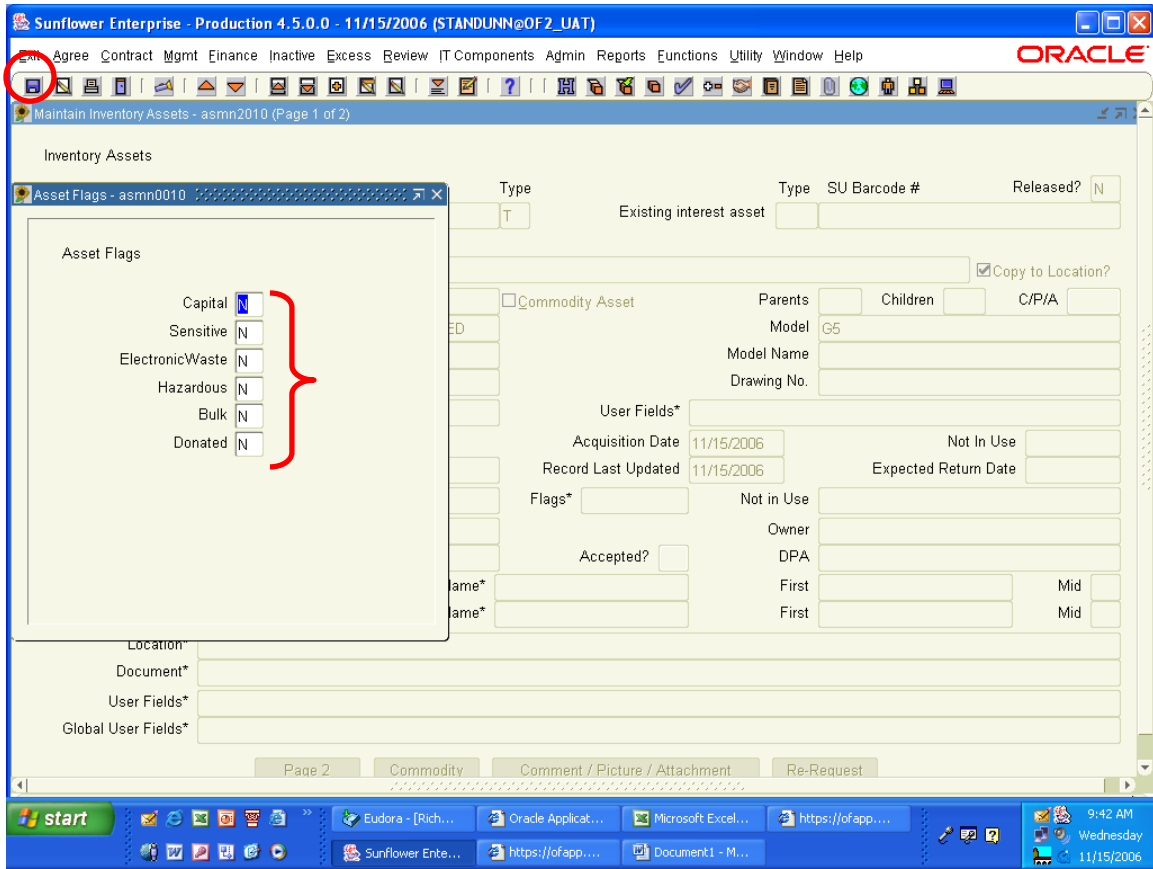


Asset condition is usually Good for a new acquisition. Double-click on the field for the list of choices, or simply enter the appropriate number (1 for Good) in the first condition field and hit TAB. The condition description will populate automatically.



The screen defaults to “In Service” for the Activity Status. If the asset will be in storage, or otherwise not in use for an extended period of time, double-click on this field and select “Inactive”. (Please do not use Excess as an activity status – that is automatic when the excess record is completed.)

Flags is a very important field. Double-click on this field to access the sub-window.



Enter a Y or N in each of the boxes as they pertain to the asset.

Capital – \$5K or more (incl tax and freight) and useful life over one year

Sensitive – capable of holding data or electronic information

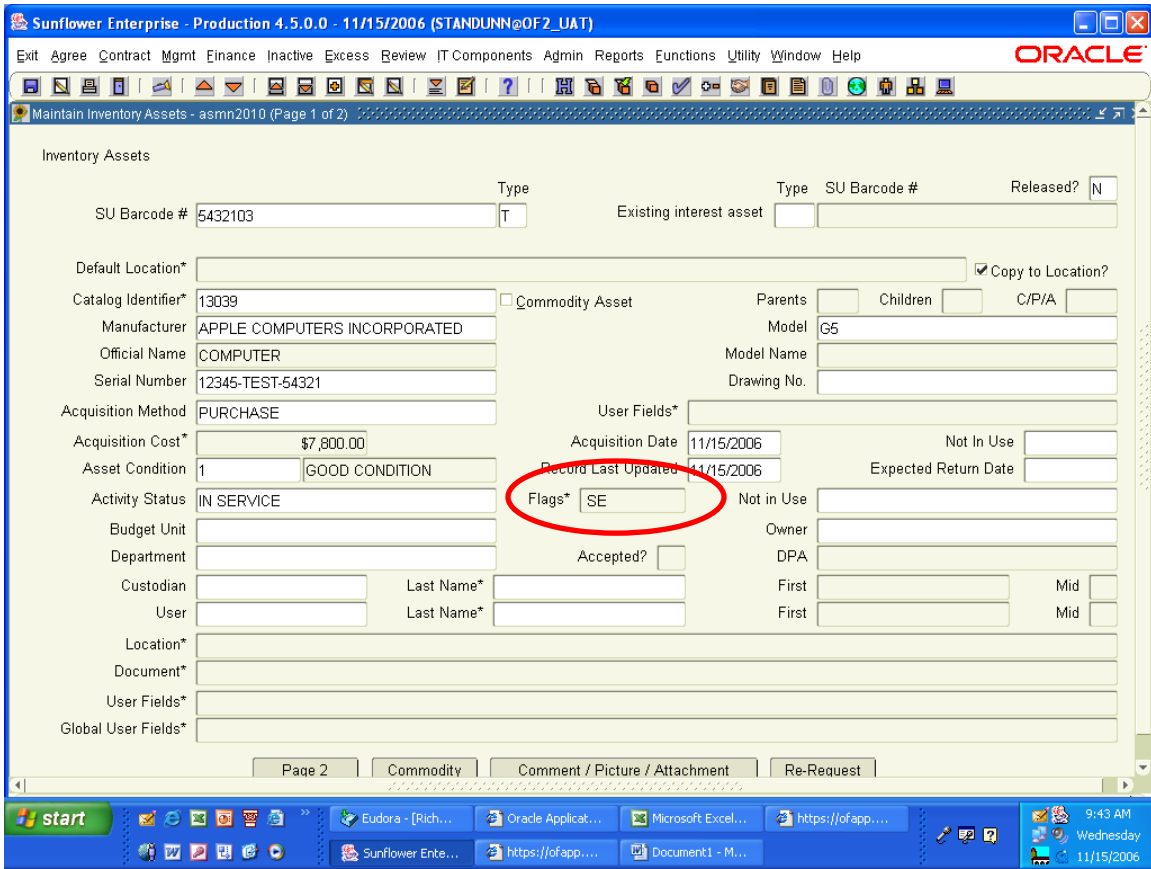
Elect. Waste – contains electronic circuitry so requires recycling

Hazardous – will be used in a biohazard or radioactive lab setting

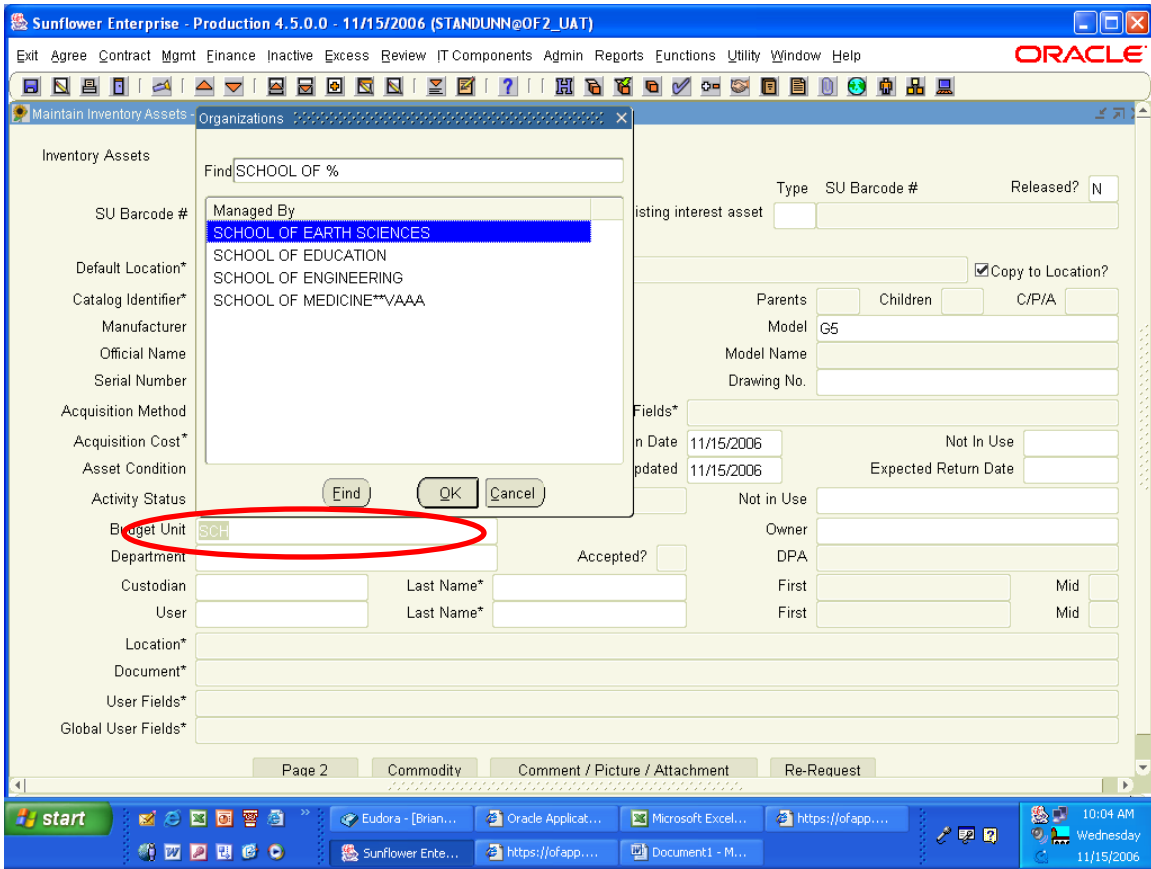
Bulk – See PSR before using, requires approval – see property manual

Donated – the equipment was donated to the university

After entering an answer to each of the criteria, click on the SAVE icon to save the attributes.

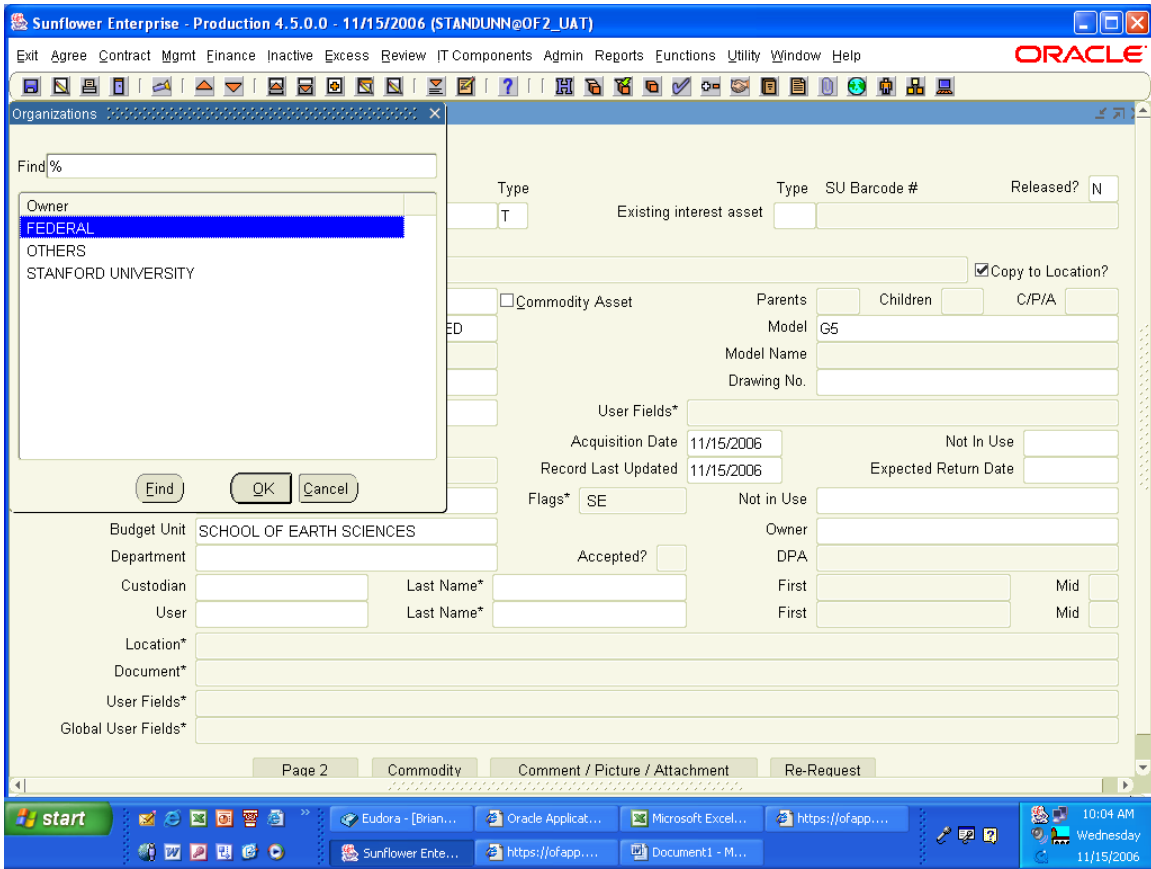


After saving the flags, the field will populate with the first letter of each of the attributes that apply (for example SE = Sensitive and Electronic waste).



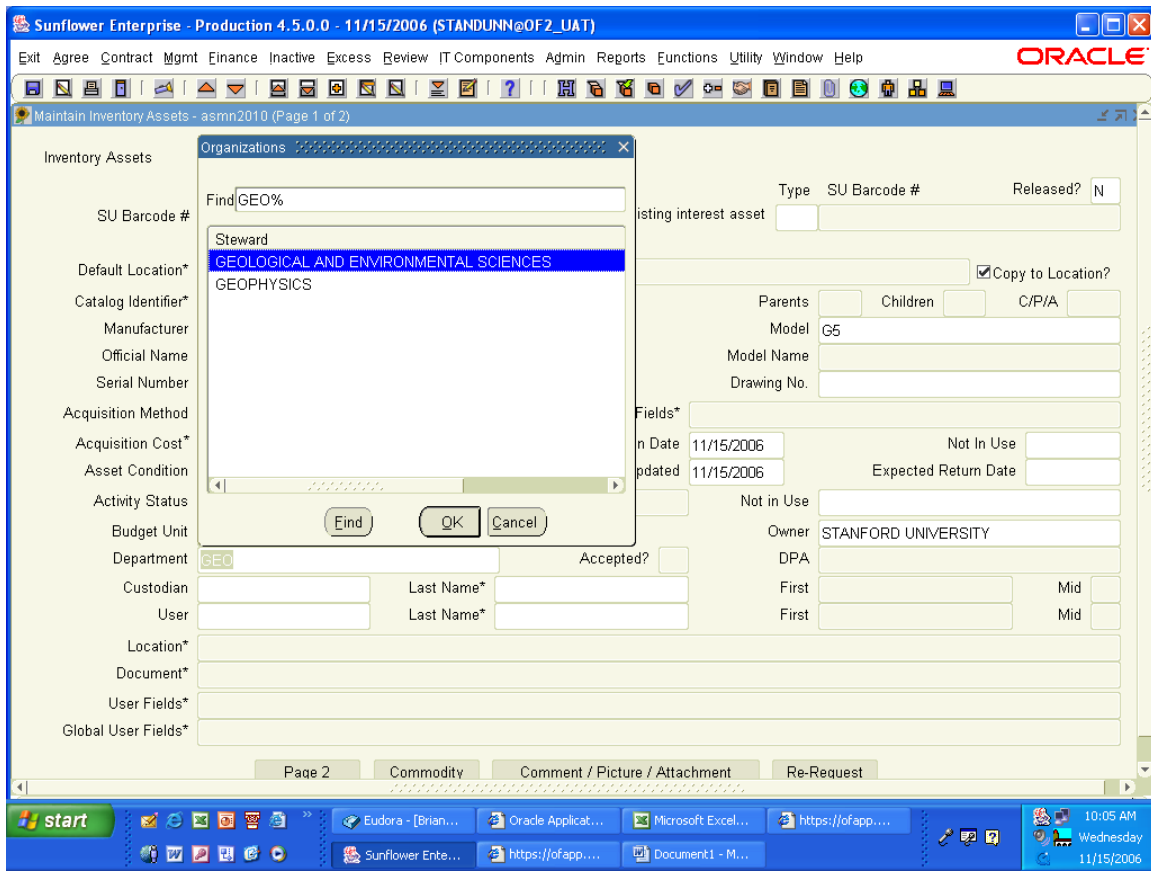
Business Unit (aka Budget Unit, or Manager) is the overarching area of the University that your departments falls under. These are high-level organizations such as a School or major Administrative group. Either double-click on the field for the entire list, or enter the first few characters to narrow it down for faster selection.

Double-click on, or highlight the correct choice and hit OK to complete the field.



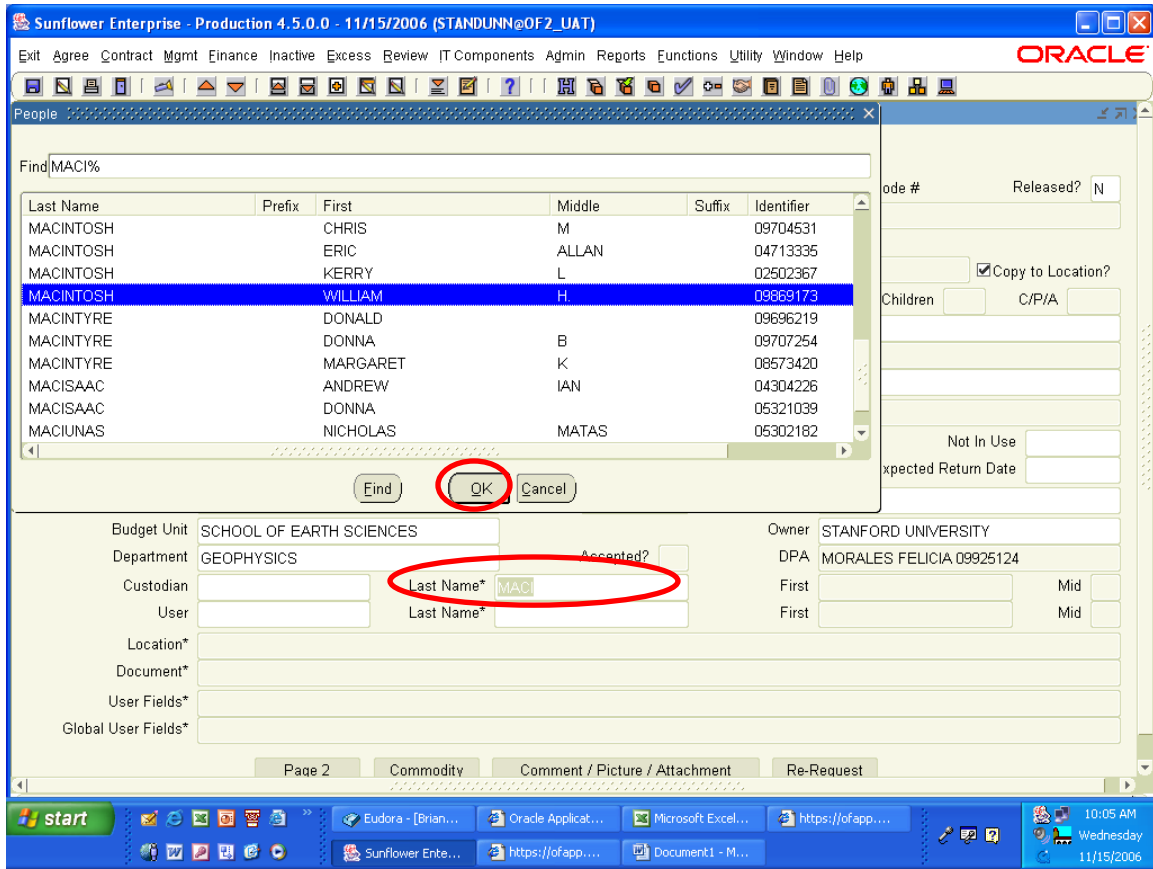
The next field is Owner, which can be one of three choices: “Stanford University”, “Federal”, or “Others”. Select from the double-click list of values and hit OK,

Hint: As a shortcut, simply enter the first letter of the choice you want (S, F, O) and hit TAB.



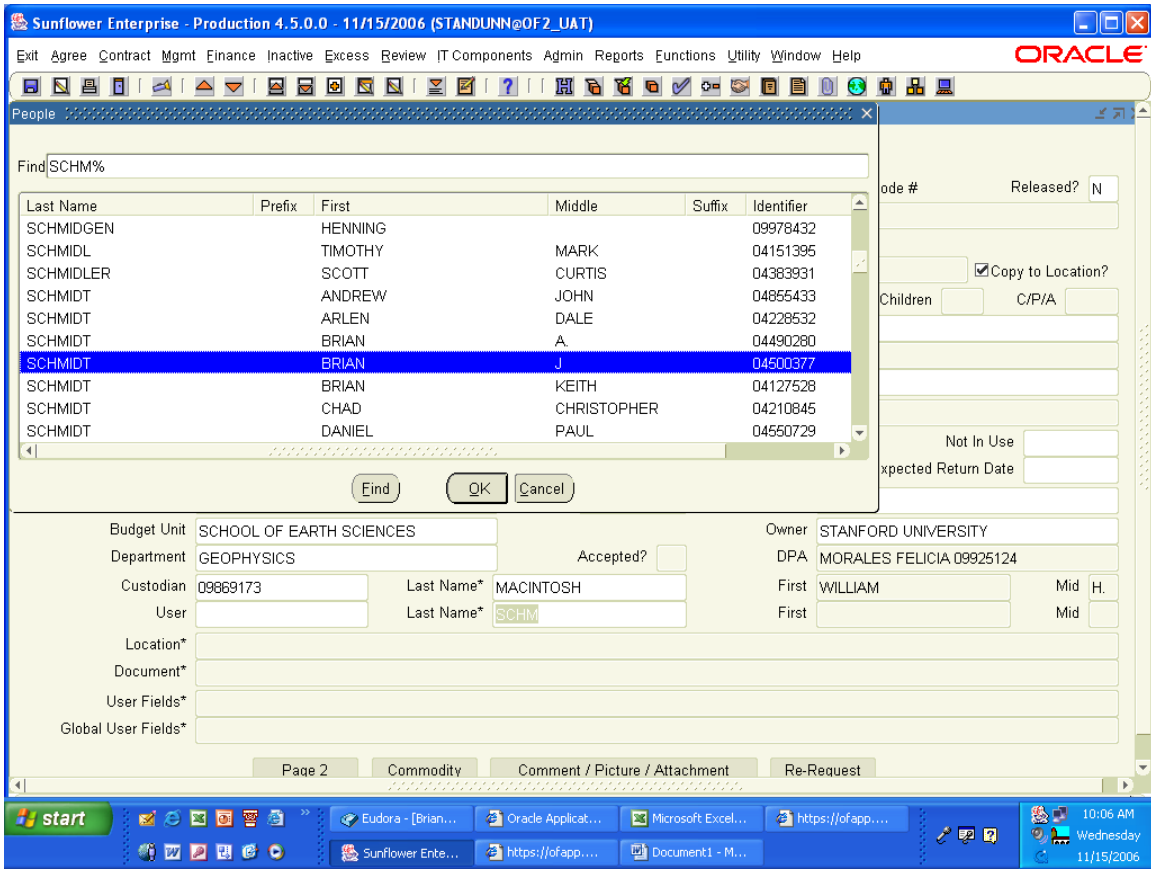
Now enter your Department name in the Department field (aka Steward). Again, you can either type in the name, or double-click in the field and select from the list of values.

Typing the first few characters before double-clicking (or hitting TAB) will bring up a shorter list for faster selection.



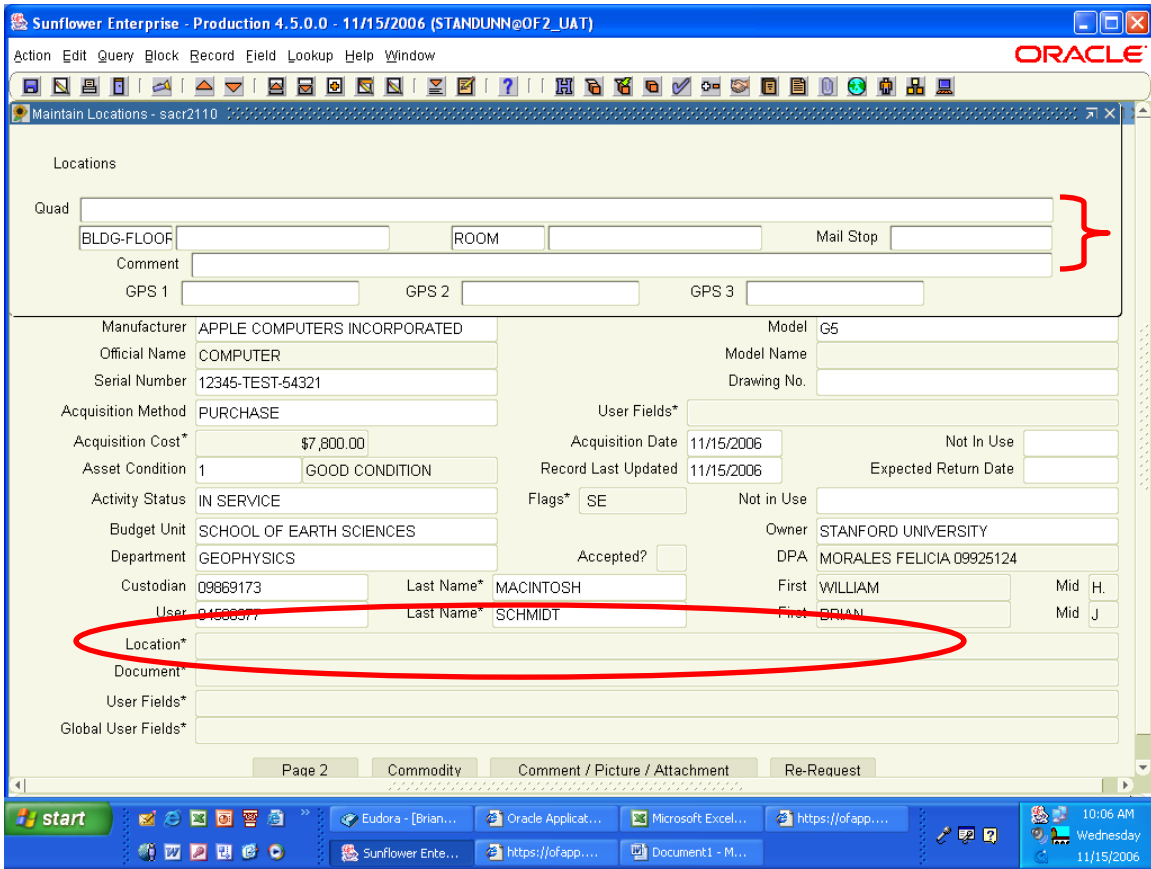
Enter the last name (or first few characters) of the Custodian into that field and hit TAB. From the resulting list of values, select the correct name and double-click on it or hit the OK button..

The custodian should be the person who has authority over the use, movement, and ultimate disposition of the asset. This could be a PI, a lab manager, or office administrator. It must be a permanent employee of the University (not a student or a temporary affiliate).



Do the same for the User, if desired (this is an optional field). This should be the day-to-day user of the item. The only requirement for user is that they be in the Human Resources system.

Note: To record a group or a non-Stanford user, there is a free-form field in Global User Fields that can be used for that.



Double-click on Location to open the sub-window and enter the Quad, Building and Room information.

Quad, Building-Floor, and Room are required. Mail Stop and additional comments are optional. We are currently not using the GPS coordinates.

Locations

Quad

BLDG-FLOOR ROOM Mail Stop

Comment

GPS 1 GPS 2

Manufacturer

Official Name

Serial Number

Acquisition Method

Acquisition Cost*

Asset Condition

Activity Status

Budget Unit

Department

Custodian Last Name*

User Last Name*

Location*

Document*

User Fields*

Global User Fields*

Page 2 Commodity Comment / Picture / Attachment Re-Request

Level Two Structures

Find %

Identifier	Name	Type
101	101	ROOM
103	103	ROOM
104	104	ROOM
105	105	ROOM
107	107	ROOM
109	109	ROOM
121	121	ROOM
122	122	ROOM
123	123	ROOM
124	124	ROOM

Find OK Cancel

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Action Edit Query Block Record Field Lookup Help Window

Maintain Locations - sacr2110

Locations

Quad

BLDG-FLOOR ROOM Mail Stop

Comment

GPS 1 GPS 2 GPS 3

Manufacturer	APPLE COMPUTERS INCORPORATED	Model	G5
Official Name	COMPUTER	Model Name	
Serial Number	12345-TEST-54321	Drawing No.	
Acquisition Method	PURCHASE	User Fields*	
Acquisition Cost*	\$7,800.00	Acquisition Date	11/15/2006
Asset Condition	1 GOOD CONDITION	Record Last Updated	11/15/2006
Activity Status	IN SERVICE	Flags*	SE
Budget Unit	SCHOOL OF EARTH SCIENCES	Not in Use	
Department	GEOPHYSICS	Accepted?	<input type="checkbox"/>
Custodian	09869173	Owner	STANFORD UNIVERSITY
User	04500377	DPA	MORALES FELICIA 09925124
Location*		First	WILLIAM Mid H.
Document*		First	BRIAN Mid J.
User Fields*			
Global User Fields*			

Page 2 Commodity Comment / Picture / Attachment Re-Request

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Exit Agree Contract Mgmt Finance Inactive Excess Review ITComponents Admin Reports Functions Utility Window Help **ORACLE**

Maintain Inventory Assets - asmn2010 (Page 1 of 2)

Inventory Assets

SU Barcode #	5432103	Type	T	Existing interest asset	<input type="checkbox"/>	SU Barcode #		Released?	N
Default Location*								<input checked="" type="checkbox"/> Copy to Location?	
Catalog Identifier*	13039	<input type="checkbox"/> Commodity Asset		Parents	<input type="checkbox"/>	Children	<input type="checkbox"/>	C/P/A	<input type="checkbox"/>
Manufacturer	APPLE COMPUTERS INCORPORATED			Model	G5				
Official Name	COMPUTER			Model Name					
Serial Number	12345-TEST-54321			Drawing No.					
Acquisition Method	PURCHASE			User Fields*					
Acquisition Cost*	\$7,800.00	Acquisition Date	11/15/2006	Not In Use	<input type="checkbox"/>				
Asset Condition	1 GOOD CONDITION	Record Last Updated	11/15/2006	Expected Return Date					
Activity Status	IN SERVICE	Flags*	SE	Not in Use	<input type="checkbox"/>				
Budget Unit	SCHOOL OF EARTH SCIENCES			Owner	STANFORD UNIVERSITY				
Department	GEOPHYSICS			Accepted?	<input type="checkbox"/>	DPA	MORALES FELICIA 09925124		
Custodian	09869173	Last Name*	MACINTOSH	First	WILLIAM	Mid	H.		
User	04500377	Last Name*	SCHMIDT	First	BRIAN	Mid	J.		
Location*	NEAR WEST_BLDG-FLOOR__460-01__ROOM__122__ADDITIONAL LOCATION INFO AS DESIRED (FOR TEMPORARY USE)								
Document*									
User Fields*									
Global User Fields*									

Page 2 Commodity Comment / Picture / Attachment Re-Request

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Action Edit Query Block Record Field Lookup Help Window

ORACLE

Custom Attributes of Asset States - saue2010

FA Asset ID	<input type="text"/>
Other Description	<input type="text" value="Additional descriptive information as desired"/>
Department Tag Number	<input type="text" value="IF NEEDED"/>
Asset User	<input type="text" value="FREE-FORM NAME FIELD"/>
Net Book Value	<input type="text"/>
Year Manufactured	<input type="text" value="2007"/>
Date Retired	<input type="text"/>
Retirement Status	<input type="text"/>
Alternate Location *	<input type="text"/>
IDC Flag (PMO Use Only)	<input type="text" value="ALLOW"/>
Last Calibration/Maintenance	<input type="text"/>
Next Calibration/Maintenance	<input type="text"/>

start

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10:12 AM Wednesday 11/15/2006

Inventory Assets

SU Barcode #	5432103	Type	T	Existing interest asset	<input type="checkbox"/>	SU Barcode #		Released?	N	
Default Location*								<input checked="" type="checkbox"/> Copy to Location?		
Catalog Identifier*	13039	<input type="checkbox"/> Commodity Asset	Parents		<input type="checkbox"/>	Children	<input type="checkbox"/>	C/P/A <input type="checkbox"/>		
Manufacturer	APPLE COMPUTERS INCORPORATED		Model		G5					
Official Name	COMPUTER		Model Name							
Serial Number	12345-TEST-54321		Drawing No.							
Acquisition Method	PURCHASE		User Fields*							
Acquisition Cost*	\$7,800.00		Acquisition Date	11/15/2006		Not In Use		<input type="checkbox"/>		
Asset Condition	1 GOOD CONDITION		Record Last Updated	11/15/2006		Expected Return Date				
Activity Status	IN SERVICE		Flags*	SE		Not in Use				
Budget Unit	SCHOOL OF EARTH SCIENCES		Owner		STANFORD UNIVERSITY					
Department	GEOPHYSICS		Accepted?		<input type="checkbox"/>					
Custodian	09869173	Last Name*	MACINTOSH		First	WILLIAM		Mid	H	
User	04500377	Last Name*	SCHMIDT		First	BRIAN		Mid	J	
Location*	NEAR WEST_BLDG-FLOOR__460-01__ROOM__122__ADDITIONAL LOCATION INFO AS DESIRED (FOR TEMPORARY USE)									
Document*										
User Fields*										
Global User Fields*	Additional descriptive information as desired __IF NEEDED__ FREE-FORM NAME FIELD __2007__ ALLOW									

